

Is Your State Ready for Medicaid Community Engagement?

CMS has established the federal framework. Now states need to build the people, processes, data connections, and technology to make it work.

Four Areas of Readiness



Know Who Needs Action

Before verification begins, states need to determine who is subject to community engagement requirements and who may be excluded or qualify for an exception.

One Workflow Won't Work for Everyone

Some cases resolve automatically. Others need information from the member or caseworker review.

Verify: Engage routes each case based on what is known and what still needs to be resolved.

SUBJECT TO REQUIREMENTS

Continue to verification

EXCEPTION

Verify + record exception

EXCLUDED

Record basis + effective period

STATUS CHANGE

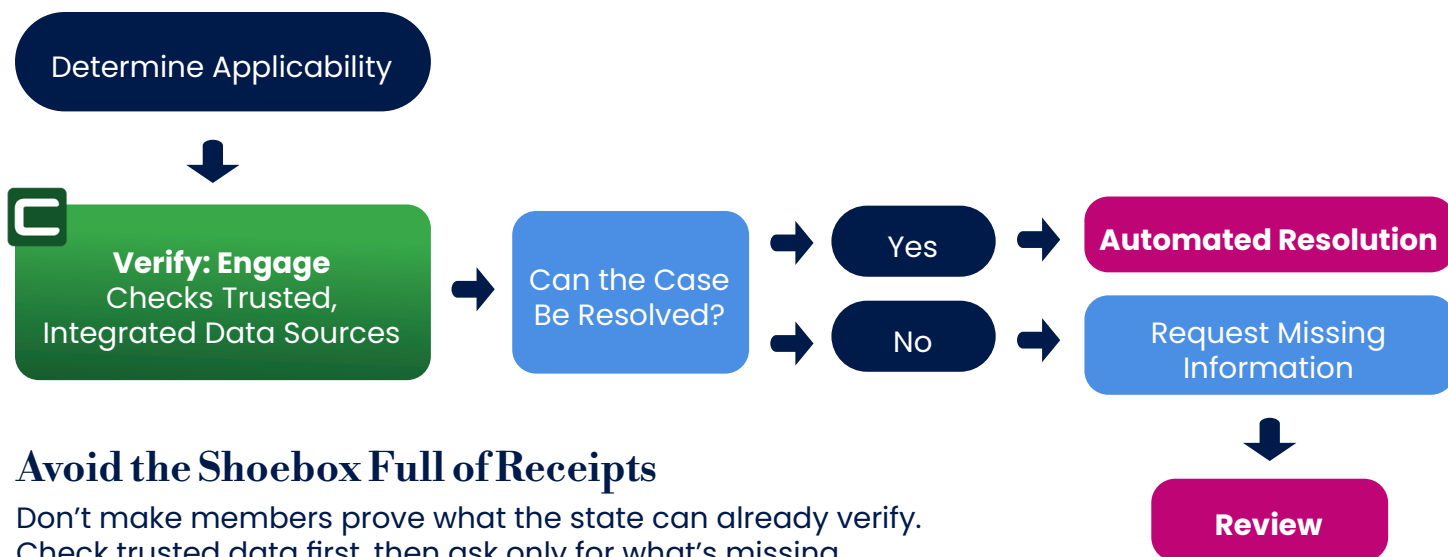
Reevaluate + route accordingly



Verify Before You Ask

The Member Is the Last Data Source

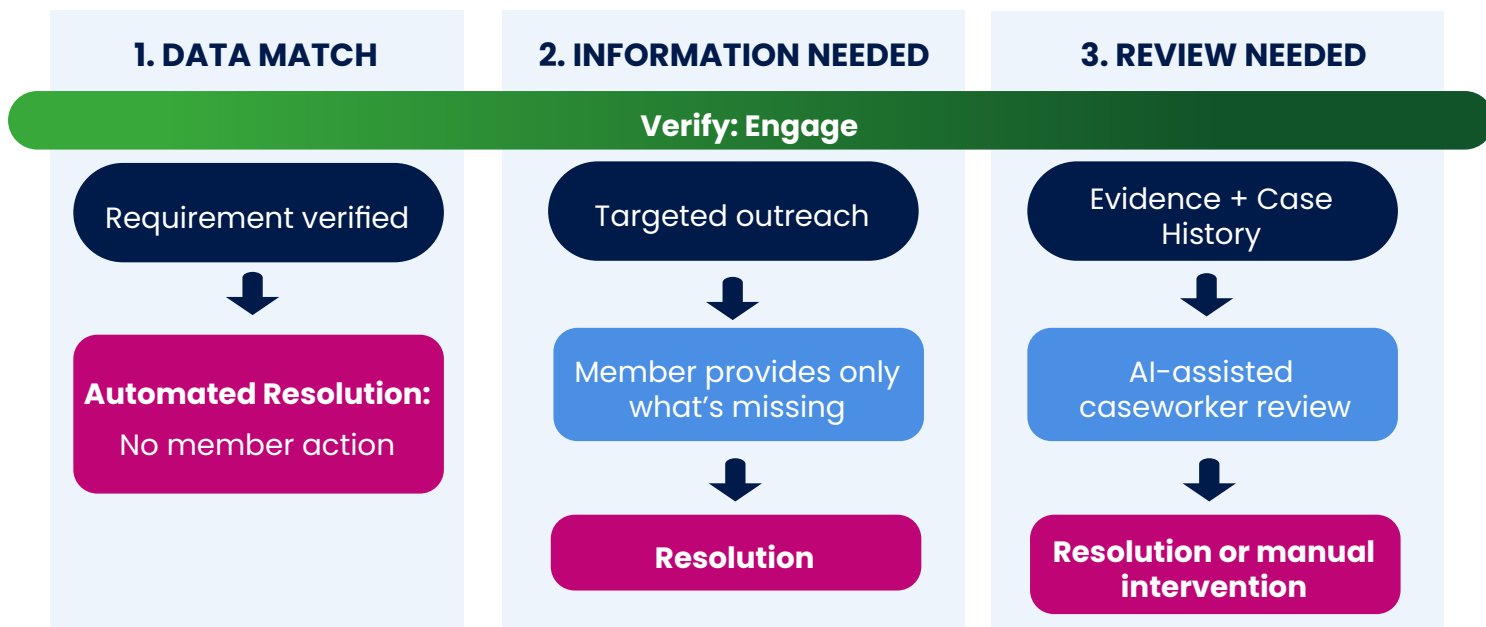
Before requesting documentation, states should check reliable data sources and information already available in the case record. Member reporting and manual review should come in when existing information cannot resolve the case.



Avoid the Shoebox Full of Receipts

Don't make members prove what the state can already verify. Check trusted data first, then ask only for what's missing.

Build Clear Resolution Paths



READINESS CHECK: When a case cannot be resolved automatically, is the next step clear for both the member and the worker?



Make Every Decision Traceable

Build for the Audit

Requirements change and a determination may be questioned months after it was made. States need to know what information was available, which rules applied, and why the decision was made.

Every determination needs a receipt.

DETERMINATION RECORD

- ✓ Data sources
- ✓ Rule version
- ✓ Evidence
- ✓ Member communications
- ✓ Worker actions
- ✓ Outcome
- ✓ Timestamps

Where Does Your Strategy Stand?

Connect with CITIZ3N to assess your current approach and identify opportunities to strengthen verification, workflows, and operational readiness.

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