

Member Handbook Submission and Review Guidelines

CCOs should follow the submission and review guidelines included in this document to assist with OHA's review of the Member Handbook.

1. **Submission Date:** CCO Member Handbooks are due to OHA for review and approval (a) annually between September 1 and November 1; (b) upon any material change prior to or after initial review and approval by OHA; and (c) within five (5) Business Days after request by OHA as may be made from time to time.
2. **Evaluation Criteria and Guidance:** OHA's evaluation criteria and guidance must be released 90 days in advance of the deliverable due date. Updated evaluation criteria and guidance are posted on the [CCO Contract Forms](#) website. OHA has updated the Member Handbook evaluation criteria for the 2024 Member Handbook submission. The criteria included in the *2024 CCO Member Handbook Evaluation Criteria* (Excel document) will be used by OHA to evaluate the member handbook submissions. The Member Handbook must address all criteria outlined by OHA. The CCO must validate the accuracy of any regulatory and/or contractual references included in the Member Handbook prior to submission for review and approval.
3. **Model handbook language:** CCOs may use model handbook language. The Model Handbook reflects suggested language to meet rules and guidelines set forth in the review criteria elements. CCOs are not required to use the language within the model handbook and can reorganize sections, use different graphics or format to fit CCOs desired flow.
 - It is the CCO's responsibility to ensure that all sections of their Member Handbook address all elements of the review criteria and meets all readability and access standards.
4. **Technical Assistance:** OHA is available for technical assistance prior to submission of the Member Handbook and during the re-submission process. Please email all technical assistance requests to OHA via email at HSD.QualityAssurance@odhsoha.oregon.gov.
5. **Delivery Method:** Member Handbooks shall be submitted between September 1 and November 1 to OHA via the [CCO Contract Deliverable Portal](#). In addition, the **CCO must complete column E** in the document titled *2024 CCO Member Handbook Evaluation Criteria* (Excel) and include with Member Handbook submission via the [CCO Contract Deliverable Portal](#).

Please note: OHA will return Member Handbook submissions to the CCO if the following occur:

- 1) The Member Handbook is not accompanied by the completed Excel spreadsheet; or
- 2) The designated columns in the Excel spreadsheet are not completed with the requested information.

6. **Format and Formatting Requirements:**

- a. The Member Handbook must be submitted via the [CCO Contract Deliverable Portal](#) in Word format. OHA will allow those CCOs with extenuating circumstances to submit in another format if they have any issues with a Word submission. Please submit extenuating

circumstance to OHA at

HSD.QualityAssurance@odhsoha.oregon.gov prior to the submission of the Member Handbook.

- b. Use naming convention **CCO_NameOfDeliverable_Version_YYYYMMDD**. The date should be the date the CCO submits the deliverable to OHA. (ex: **YCCO_MemberHandbook_v01_20220315**)
 - c. Include page numbers in the Member Handbook.
 - d. All OAR and CFR citations should be accompanied by an explanation of the information/requirement(s) in the state or federal rule. The CCO should not cite an OAR or CFR without any additional information or summary of the OAR requirement(s).
 - e. Ensure the Member Handbook is member friendly and easy-to-follow. The Member Handbook should include a table of contents, make use of graphics and white space, group similar information in the same section, and be organized in an easy to understand manner.
7. **Readability:** Prior to submitting, CCO must ensure member handbook is at a 6th grade reading level (between 6.0-6.9). OHA uses the Flesch-Kincaid Readability Scale via the spelling and grammar check function in Microsoft Word. Please reference the list of items that can be excluded from the readability calculation in the document titled *2024 CCO Member Handbook Evaluation Criteria* (excel).
8. **Identification of 2024 Changes:** The CCO must use track changes or highlight revisions made to the 2024 Member Handbook submission that were not included in the approved 2023 Member Handbook. If the CCO does not include track changes or highlight text, OHA will return the submission to the CCO and request the Member Handbook be resubmitted.
9. **OHA Evaluation Results**
- a. **OHA scoring:** Each element will be scored with either a "score=1" for met or "score=0" for not met. Each element must be fully met to score a "1". All compliant elements will be tallied to determine the overall percentage of compliance. The CCO will have to achieve 100% compliance to obtain OHA approval
 - b. **Required changes:** OHA will provide each CCO with their individual evaluation results via email. OHA reviewers will complete the OHA comments column in the *2024 CCO Member Handbook Evaluation Criteria* (Excel) document. Unless otherwise indicated, all requested edits are required and all comments must be addressed. To limit the number of re-submissions, please do not resubmit to OHA until ALL required changes and comments have been addressed. OHA will identify any other required edits not already captured in the evaluation criteria (e.g., format, structure of document, grammar, etc). OHA will score those additional edits using the scoring described above.

OHA is available to provide technical assistance upon receipt of OHA's evaluation. Please email all technical assistance requests to OHA via email at

HSD.QualityAssurance@odhsoha.oregon.gov.

- c. **Re-submission delivery method:** revised Member Handbooks must be submitted via the [CCO Contract Deliverable Portal](#). The CCO must also complete the designated columns in the document titled *2024 CCO Member Handbook Evaluation Criteria* (Excel) and return to the OHA with the Member Handbook submission via the [CCO Contract Deliverable Portal](#).
- d. **Review timeframes:** OHA will complete the initial review of the 2024 Member Handbook within 30 days of receipt. OHA recommends CCOs submit the 2024 Member Handbook as early as possible within the submission timeframe (October 1 – November 1) to allow enough time to the CCO to submit the approved Member Handbook for translation, printing and mailing.

OHA will complete the evaluation of each Member Handbook re-submission (after the first review) within two weeks of receipt. Please note numerous re-submissions to address the corrections in OHA’s original evaluation will impact the CCO’s overall timeline for translation, printing, and distribution of the Member Handbooks.

10. **Final Approval:** A final clean copy must be uploaded to the [CCO Contract Deliverable Portal](#) for final approval. Final approval will be granted in the [CCO Contract Deliverable Portal](#).
11. **Translation Requirements:** OAR 410-141-3575 defines “prevalent non-English languages” as all non-English languages that are identified during the eligibility process as the preferred written language by the lesser of: (A) Five percent of the MCE’s total OHP enrollment; or (B) One thousand of the MCE’s members. If a prevalent language is identified in a CCO service area, the CCO will need to provide written translation of the member handbook in the prevalent language.

Once a final translated copy of the Member Handbook is available, CCOs must submit the MH in the prevalent non-English languages via the [CCO Contract Deliverable Portal](#). OHA will not review translated materials, but will confirm the material is available in the prevalent languages within the service area.

12. **Member Notification:** CCOs must notify members of the availability of the Member Handbook. For 2024 Member Handbooks, OHA will not grant a grace period for translation and printing, similar to 2023 Member Handbook distribution, and all Member Handbooks must be mailed within the timelines outlined in OAR. OHA strongly encourages all CCOs to submit the 2024 member handbooks as close as possible to September 2023.
 - a. OAR 410-141-3585 (8) states existing MCE members must be notified annually of the availability of a member handbook and provider directory and how to access those materials. MCEs shall send hard copies upon request within five days. OHA interprets this to mean current members must be sent a notice informing them of the availability of the updated member handbook and provider directory.
 - b. OAR 410-141-3585 (7) states within 14 days of an MCE receiving notice of a member’s enrollment, MCEs shall mail a welcome packet to new members and to members returning to the MCE 12 months or more after previous enrollment. The packet shall include, at a minimum, a welcome letter, a member handbook, and information on how to access a

provider directory, including a list of any in-network retail and mail-order pharmacies. Only new members or members returning to the CCO 12 months or more after previous enrollment are required to receive a hard copy of the handbook along with the welcome packet. OHA interprets this to mean the packet must be mailed within 14 days of being notified of a member's enrollment.