PATH Collaborative Planning & Implementation (CPI)

Welcome! The Southwest Collaborative Planning Convening will begin shortly.

January 15, 2026
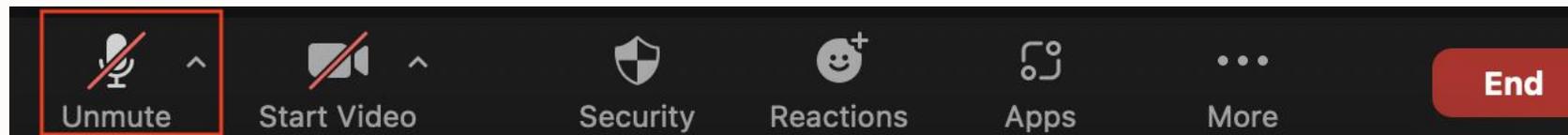
This event is being recorded and transcribed.

Why? PHIL uses the recording and transcription to assess key takeaways, CPI participant needs, and to develop better events for you in the future.

Recordings will be available by request after the event.
Email **PATH@pophealthinnovationlab.org** to request access.

Please mute your microphone during the presentation.

PATH Collaborative Planning & Implementation (CPI)

Southwest Collaborative Monthly Convening

January 15, 2026

Thank you to our sponsors

Land Acknowledgment

The Population Health Innovation Lab team respectfully acknowledges that we live and operate on the unceded land of Indigenous peoples throughout the U.S.

We acknowledge the land and country we are on today as the traditional and treaty territory of the Native American, Alaska Native, and Tribal nations who have lived here and cared for the Land since time immemorial. We further acknowledge the role Native American, Alaska Native, and Tribal nations have today in taking care of these lands, as well as the sacrifices they have endured to survive to this day.

Welcome & Housekeeping

Roll Call

Please share your name, location, and organization in the chat.

Request for Vendors

Vendors and salespeople should recuse themselves from soliciting during this collaborative convening.

Population Health Innovation Lab (PHIL) PATH CPI Project Team

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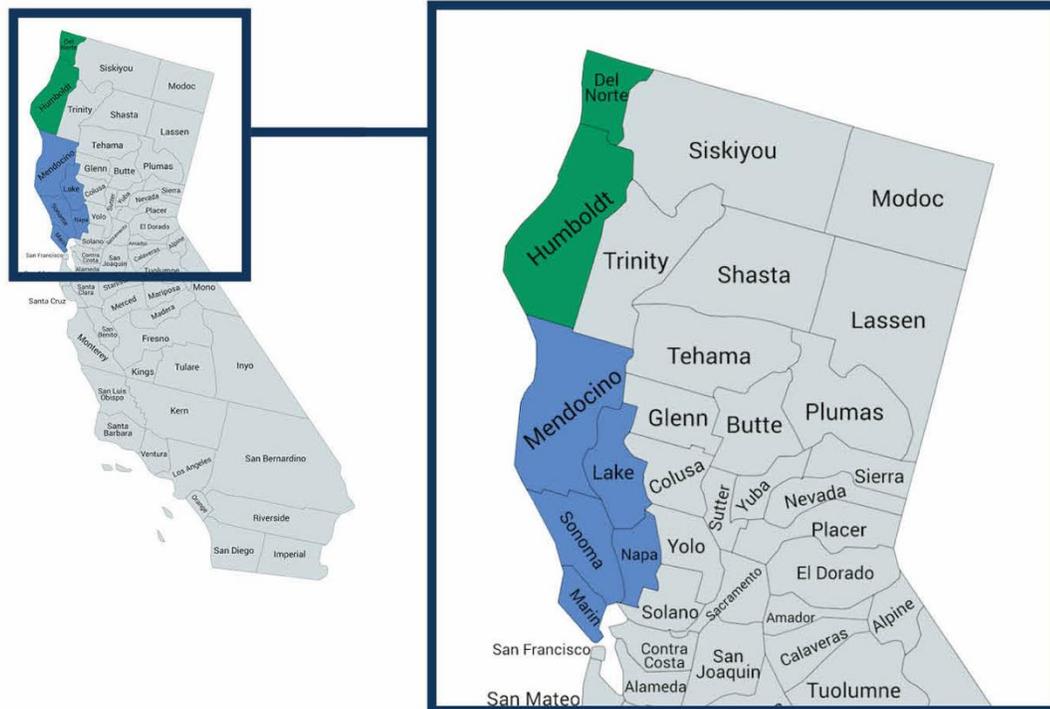**Christina Olson**
PHIL Collective Director
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Collaborative Planning & Implementation Overview

Region Counties Supported by PHIL

Northwest

Southwest

CPI collaboratives will work together to identify, discuss, and resolve CalAIM implementation issues.

- Learn more about the PATH CPI initiative here.

- Catch up with us! Find meeting materials, Readiness Roadmap Resources, and registration links on the PHIL website.

- Find all the specific resources for today's meeting on our SW CPI Resource Hub (Zoom Doc).

Scan for Zoom Doc

Southwest CPI Agenda for Today

- Welcome & Framing

- 2025 CPI Data Review: Regional Reflections

- Mini-Training & Resource Review: Open Space Technology

- Applying Open Space Technology: Equity in Practice Conversations (Breakout Rooms)

- Managed Care Plan Updates from Partnership HealthPlan of California and Kaiser Permanente

- CalAIM Announcements & Policy Updates

- Closing and Evaluation

Commitments to Community Inclusivity

Be Present, Brave, and Curious

- Encourage different opinions and respectful disagreement
- Embrace conflict which can deepen our understanding
- **Acknowledge the risk speakers take, and value the privilege to learn from one another**
- Make use of opportunities to connect person-to-person

Create An Inclusive Space

- Invite the unheard voices
- **Take responsibility for our own voices (make space)**
- Resist the temptation to only witness the dialogue (take space)

Invite Anti-Racist Dialogue

- Be aware we all have a bias that may impact action; biases are learned and can be unlearned
- Address racially biased systems and norms
- **Recognize the vast and varied lived experiences participants have with racism**
- Be intentional about power dynamics and how you exercise your privilege
- Avoid defensive responses when people speak from lived experiences with racism

Be Accountable

- Foster awareness of unrepresented community members not "in the room"
- Respect each other's time - participate fully and prepare for each activity
- Commit to actions that move items beyond discussion
- **Practice patience and persistence – we cannot solve everything in a single conversation and will revisit topics that require additional discussion**

CPI Resource Hub (Zoom Doc)

PATH Southwest Region CPI Monthly Meeting Resource Hub

Updated at 09:37 PM 08/20/2025 | ✦ Quick preview•

Event Details
Beyond Land Acknowledg...
Monthly Meetings Links
    August 21, 2025
Upcoming Events
Stay in Touch with PHIL & ...

Welcome to the resource page for our monthly CPI Meeting!

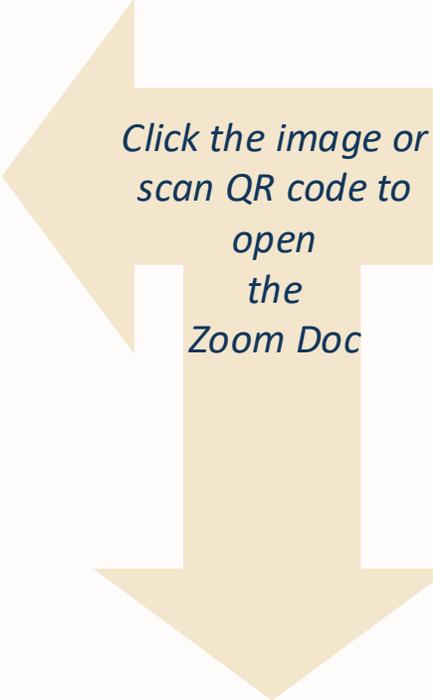Meetings Occur the Third Thursday of the Month | 11 am -12:30 pm PT

Our Sponsors:

DHCS

PUBLIC CONSULTING GROUP™

Event Details

A monthly event is hosted by the Population Health Innovation Lab (PHIL) for the PATH Southwest Collaborative Implementation and Planning (CPI) Region which includes five California counties: Lake, Marin, Mendocino, Napa, and Sonoma.

The Southwest CPI is comprised of partners who come together to improve the quality of care for families and individuals in the region. Registered participants collaboratively support the implementation of Enhanced Care Management (ECM) and Community Supports initiatives by

Click the image or scan QR code to open the Zoom Doc

2025 CPI Data Review: Regional Reflections

Engagement snapshot

- 12 monthly convenings delivered (Jan–Dec 2025)

- Attendance: Monthly aggregated attendance across the past year reflects participation from 593 individuals representing approximately 103 organizations.

- Evaluation surveys submitted: 214

91%

Positive: open & transparent forum

Across 2025 session evaluations (n=133)

91%

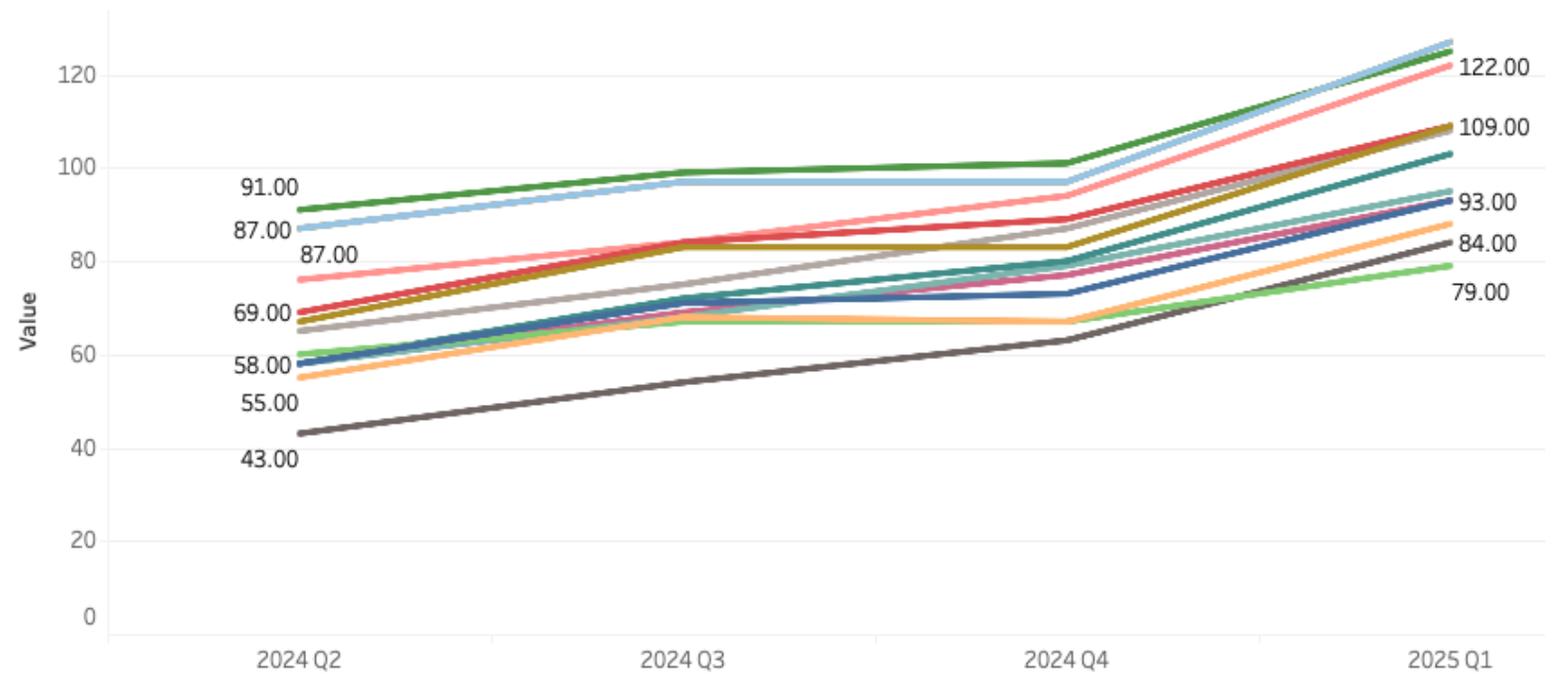**Positive: shared learning & dialogue**

Across 2025 session evaluations (n=148)

How many attended?

■ Aggregated Attendance 2025 (individuals)

■ Aggregated Attendance 2025 (Organizations)

Contracted ECM Providers Trend, Last four Quarters

Contracted ECM providers increased by approximately **24%** across the region over the past year.
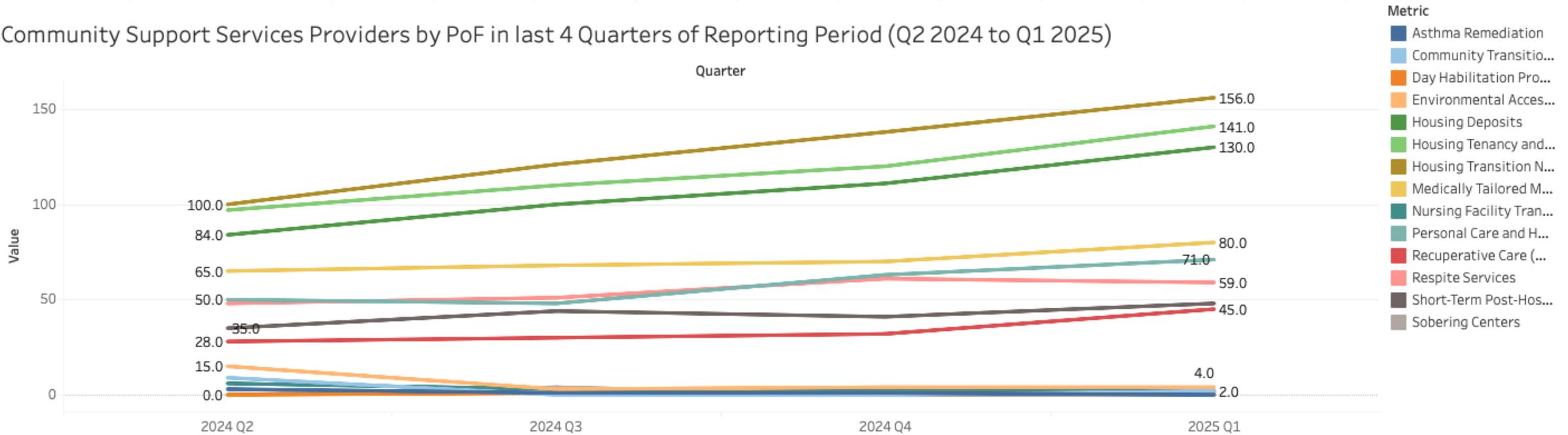
Members Receiving ECM Services, Last Four Quarters

Members receiving ECM services increased by approximately **68%** across the region over the reporting period.

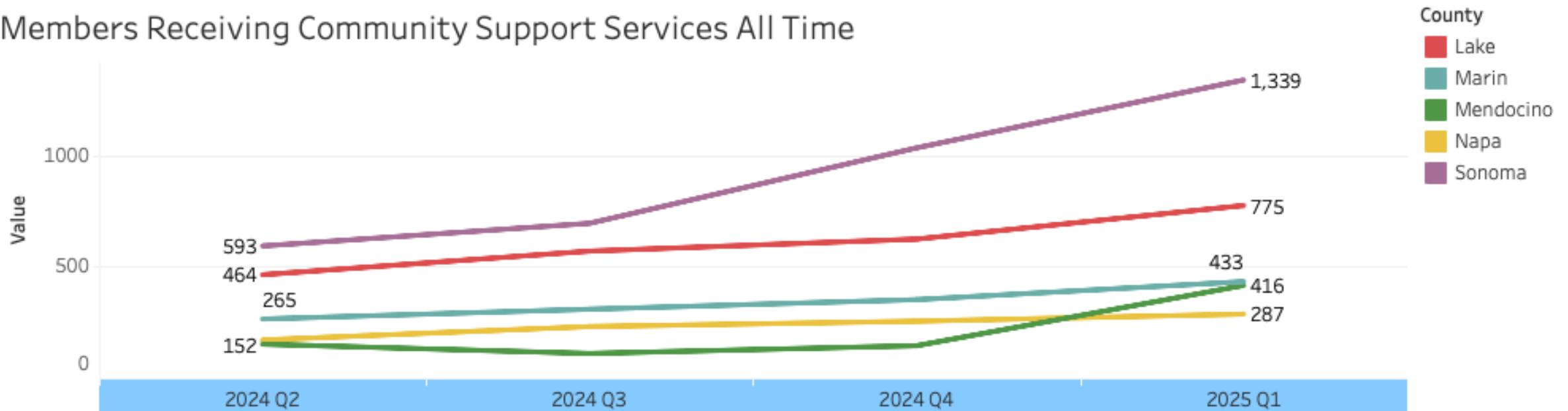# Contracted Community Support Providers, Last Four Quarters

Community Support Services Providers by PoF in last 4 Quarters of Reporting Period (Q2 2024 to Q1 2025)

Contracted Community Support providers increased by approximately **45%** across the region over the past year.

Members Receiving Community Support Services — Regional Trend

Members Receiving Community Support Services All Time

County
- Lake
- Marin
- Mendocino
- Napa
- Sonoma

Value: 1,339, 775, 593, 464, 433, 416, 287, 265, 152

2024 Q2   2024 Q3   2024 Q4   2025 Q1

Members receiving Community Support services increased by approximately **98%** across the region over the reporting period.

Equity: What We Heard & Our Progress

What We Heard	Our Progress & Next Steps

What We Heard

Addressing Service Gaps

- **Expand outreach & program support** to underserved populations
- **Increase availability & accessibility** of services

Tailored Support for Tribal and Rural Providers

- Address **cultural, geographic**, & **logistical** challenges
- Provide **targeted guidance** to strengthen local capacity
- Prioritize **Tribal partner participation**

Resource Sharing and Capacity Awareness

- **Improve access to information** on services and local community resources
- **Enhance awareness** of provider capacity

Our Progress & Next Steps

Progress We've Made

- Hosted three **Tribal Roundtable** meetings in 2025 (1 in person, 2 virtual)
- Discussed **Guiding Principles for Equitable Data Sharing**
- Shared **Resources & Tools** (e.g. ECM/Community Support Contracted Providers List)

Looking Ahead: Equity in 2026

- **Sustain & Expand** Equitable Practices
- Continue **Tribal Roundtable**
- Strengthen child/youth pathways (coordination, workflows, legalities)
- Improve TA marketplace access and direct points of contact

Mini-Training & Resource Review: Open Space Technology

What is Open Space Technology (OST)?

- Open Space Technology (OST) is a methodology of hosting events around a central topic where participants create the agenda themselves.

- The process is designed to be highly participatory, inclusive and collaborative and can be with groups ranging in size from 5 to over 1000.

- Participants are in full control of their experience and the outcome of the session – collectively they create the agenda

When do you use Open Space Technology?

- Open Space Technology is particularly effective when no one knows the answer, and when a diverse group of people with different perspectives is required to find a solution.

- Examples of use:
  - Community Planning and Collaboration
  - Deep learning about issues and gaining perspectives

How does Open Space Technology work?

- **Set a Conversation Theme**
  - The theme helps to focus discussion and to inspire participation
  - Today's Open Space theme is *Equity in CalAIM Practice*

- **Create the Agenda and Marketplace**
  - Participants are invited to identify topics related to the theme they want to discuss
  - Not everyone needs to put forward a topic
  - The participants that suggest themes are the hosts of the conversations
  - You do **NOT** have to be an expert of the topic – it should be something you want to discuss with others

- **Break into groups by the topics related to the Theme**
  - Participants will choose which topic they are interested in discussing and go the relevant breakout room

- **Follow the OST Roles and Principles**

Open Space Roles

- The host is always the person that proposed the topic of discussion and does not change during a round of conversation.

- You can play one role or in some cases, start in one role and switch to another!

Bumble bees

Butterflies

Roles

Hosts

Participants

Scribes

4 Principles of Open Space

4 Principles and 1 Law

- Whoever comes are the right people
- Whenever it starts its the right time
- Whatever happens is the only thing that could have
- When its over its over

The Law of Two Feet

IF AT ANY TIME YOU FIND YOURSELF IN ANY SITUATION WHERE YOU ARE NEITHER LEARNING NOR CONTRIBUTING, USE YOUR TWO FEET.

Questions?

Today's Open Space Marketplace Theme:

Equity in Practice

Partnership HealthPlan of California (PHC)
Managed Care Plan CalAIM Updates
January 2026

Amber Kovalchuk

MCP CalAIM Updates
January 2026

Agenda

- Transitional Rent
- Housing Deposit Changes
- ECM Exclusion-DSNP

Transitional Rent

- Partnership is working with County BHA to complete contracting

- DHCS is still working on finalizing the referral requirements and the policy guide for Transitional Rent

- Partnership has added Transitional Rent to the referral form. Please note:
  - Transitional Rent may not be used to cover eviction prevention including back rent or prospective rental assistance for individuals who are housed and at risk of homelessness
  - Members must meet all three of the eligibility requirements to be referred to a provider
  - Once deemed eligible, the member will work with provider to identify appropriate housing and work on a sustainability plan which is a requirement of Transitional Rent approval

Community Supports: Housing Deposit Changes

- Beginning in January, certain Household Furnishings will be reimbursable under the Housing Deposit Service using the *Housing Deposit Services Request for Funds Form.*
- Providers will be expected to submit the following with the HD TARs
    - o HD Form request
    - o Housing Support Plan
    - o Copy of the lease or similar document
    - o Household item receipts and/or PO
- Providers will also indicate date of inspection and communication with landlord on the form
- Form was reviewed at the January provider webinar
- Form is posted on the Partnership CalAIM website

ECM Exclusion: DSNP

- Dual-eligible Medicare and Medi-Cal Members enrolled in full scope Medicare with a DSNP plan are excluded from ECM

- Per DHCS, since 2024, these members should receive coordination of services ("ECM"-like supports) from their Medicare DSNP plan.

- Providers should proactively verify Medicare eligibility and confirm the Member is not enrolled in a DSNP by obtaining their Medicare plan, checking Medicare eligibility online, or calling Medicare.

- If a Member is found to not be enrolled in a DSNP, a TAR correction or reauthorization should be submitted including the Medicare card and a simple statement of attestation documenting the call to the insurance plan with date and contact.

- If a Member is enrolled in a DSNP, the Member is required to receive coordination of care through their Medicare plan.

Medi-Medi Exclusion Resources

For any questions or concerns with this requirement, you may reach out to DHCS directly at CalAIMECMILOS@dhcs.ca.gov

Please refer to the DHCS ECM policy guide for additional information: https://www.dhcs.ca.gov/CalAIM/ECM/Documents/ECM-Policy-Guide.pdf

Questions

Contacts:
- **ECM@partnershiphp.org**
- **CommunitySupports@partnershiphp.org**
- **ClaimsECMhelpdesk@partnershiphp.org**

Register for upcoming CalAIM Office Hours [here](#)

Kaiser Permanente
Managed Care Plan CalAIM Updates
January 2026

Tamar Kurlaender

Southwest
PATH CPI

Tamar Kurlaender, Medi-Cal Local Engagement

January 15, 2026

Federal Update: HR 1: Eligibility Changes to Medi-Cal

Effective Date	Medi-Cal Change
October 1, 2026	Restricts Medi-Cal eligibility for some immigrant populations such as refugees.
December 31, 2026 (potential delay of two years).	Requires (with some exceptions) adults 19-64 of age to work, go to school, or volunteer to keep their Medi-Cal. This will depend on how much money their household makes.
January 1, 2027	Some individuals will be required to confirm Medi-Cal eligibility every six months, based on: • Age (ages 19 through 64); and • Income (for example, $21,597 for a single individual, $29,187 for a couple)
October 1, 2028	Require Medi-Cal to impose fees for certain medical services on some individuals based on: • Age (ages 19 through 64); and • Income (for example, $21,597 for a single individual, $29,187 for a couple)

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State Budget: Eligibility Changes to Medi-Cal

Effective Date	Medi-Cal Change
January 1, 2026	The state is changing the rules for Medi-Cal. Older adults and people with disabilities may need to have less money and property to qualify.
January 1, 2026	Freezes future Medi-Cal enrollment for undocumented members aged 19 years of age and older.
July 1, 2026	Eliminates Medi-Cal dental benefits for Medi-Cal members with specific immigration status.
July 1, 2027	Requires $30 monthly payment for Medi-Cal members 19-59 years of age with specific immigration status but will still provide full Medi-Cal coverage for pregnant members with those specific immigration statuses.

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REMINDER: Kaiser Permanente Referral Forms

Kaiser Permanente has CalAIM referral forms. These referral forms aim to improve successful linkages and enhance information collected, thereby reducing authorization delays.

1. [Enhanced Care Management, Complex Care Management (CCM), and Community Health Workers Referral Form](#)

2. [Community Supports – Referral Form Housing Insecurities](#)

3. [Community Supports – Referral Form Keeping Members at the Home and Chronic Conditions](#)

More information available at [Provider Information | Community Provider Portal | Kaiser Permanente](#)

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Additional NLE Provider Support | Provider Office Hours

Kaiser Permanente is working with Network Lead Entities (NLEs) to develop a network of community-based ECM, CS, and CHW providers.

INDEPENDENT Living Systems

Contracted Providers
Second/Fourth Thursdays
1:00 – 2:00 pm
Zoom: Join Meeting Now

Prospective Providers
First Thursdays of the Month
1:00 - 2:00 pm
Zoom: Join Meeting Now

Questions?
ILSCAProviderRelations@ilshealth.com
Phone number: 844-269-3447

Full Circle Health Network

Contracted Providers
Tuesdays
3:00 - 4:00 pm
Microsoft Teams: Register and Join Here

Prospective Providers
Second/Fourth Thursdays of the Month
12:00 - 1:00 pm
Microsoft Teams: Register and Join Here

Questions?
network@fullcirclehn.org
Phone number: 888-749-8877

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Questions?   **Reflections?**   **Ideas?**

Contact your Medi-Cal Local Engagement Representative!

Tamar Kurlaender

tamar.x.kurlaender@kp.org

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CalAIM Policy Updates

Medi-Medi Plan Expansion

- [California Expands Medi-Medi Plans to 29 New Counties](#)

- [Medi-Medi Plan Expansion Fact Sheet](#)

- [Medicare Medi-Cal Plan List](#)

Federal Use of Medi-Cal Data & Member Privacy

[Statement from DHCS on the Federal Use of Medi-Cal Data and Member Privacy](#)

Updated January 2, 2026

MCP-Hub Toolkit: A Resource for MCPs and CalAIM Providers

The MCP-Hub Toolkit is intended for MCPs, existing Hubs, and organizations interested in becoming Hubs to support the delivery of Medi-Cal services. It includes a series of modules that highlight opportunities, basic requirements, considerations, and provide practical tools to support MCPs and Hubs to operationalize voluntary contracting partnerships.

- Informational Webinar: **January 16, 2026, 1:00pm – 2:30pm** (Webinar Registration Link)
  - Present the MCP-Hub Toolkit and discuss opportunities and basic requirements
  - Review considerations for Medi-Cal managed care plans (MCP) and Hubs to operationalize voluntary contracting partnerships.
  - Q&A session

Coverage Ambassadors Webinar

Thursday, January 29, 2026

11:00am – 12:00pm

Register Here

Find resources and learn more about Coverage Ambassadors here*.*

Coverage Ambassadors are trusted messengers who help raise awareness about Medi-Cal benefits, enrollment opportunities, and new initiatives aimed at building a healthier California for all.

Upcoming Events
Find All Registration Links on the Zoom Doc Resource Hub

January	February	March
20 CalAIM Deep Dive Webinar – Financial Sustainability (HC2 & IHI)	**19** Tribal Roundtable	**19** Tribal Roundtable
22 Rural Resilience Innovation Hub Meeting	**19** SW Monthly Meeting	**19** SW Monthly Meeting
30 Indian Health Collaborative Meeting	**27** Indian Health Collaborative Meeting	**27** Indian Health Collaborative Meeting

CPI Resource Hub (Zoom Doc)

Click the image or scan QR code to open the Zoom Doc

Post-Event Evaluation

To continue improving our work as your CPI Facilitator, PHIL kindly asks that you complete the brief survey that pops up in a new tab at the close of the meeting. Your feedback ensures quality improvement and will inform planning and activities through the evolution of the collaborative.

https://s.zoom.us/m/bPlRxXdOF

Thank You!

Feel free to contact our PATH CPI team any time at PATH@pophealthinnovationlab.org

Thank you!