



August 18, 2026

CaAIM: Connecting Patients to Services Referral Pathways & Community Based Partnerships for FQHCs

PART 2 of 3

Presented by Noetic Consulting



Disclosure

CPCA staff and speakers have reviewed all financial relationships with ineligible companies and the presenters have no relevant financial relationships to disclose.



Welcome

While we're waiting, please rename yourself.

RENAME YOURSELF

- 1 Click** the Participants icon
- 2 Hover** over your name & click rename
- 3 Add** your name, pronouns, and organization
- 4 Click** OK

**Please no acronyms*

ON PHONE AUDIO?

Here's how to connect.

- 1** Find your participant ID in the top-left of your Zoom window.
- 2** Press #number# (e.g., #24321#) to connect.
- 3** You'll see: "You are now using your audio for your meeting."

Housekeeping Reminders



Mute

We'll mute lines during the presentation to prevent background noise.



Questions

Submit questions using the chat feature or unmute and ask!



Slides + Recording

Slides and recording will be posted to PopHealth Website and emailed out after the session.



Tech Issues

Private chat **Kathleen Figoni** for assistance.

Continuing Education Credit

In support of improving patient care, the Learning Center has partnered with the California Primary Care Association (CPCA) to provide continuing education for the healthcare team:

- **Accreditation Council for Continuing Medical Education (ACCME)**
- **Accreditation Council for Pharmacy Education (ACPE)**
- **American Nurses Credentialing Center (ANCC)**



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INTERPROFESSIONAL CONTINUING EDUCATION



TO RECEIVE CREDIT:

You will need to fill out the evaluation that will be shared at the end of this session.

Continuing Education Credit

Credit Type	Profession	Accreditation Statement
AMA PRA Category 1™ (CME)	Physicians	In support of improving patient care, this activity has been planned and implemented by the Population Health Learning Center and the California Primary Care Association. The California Primary Care Association is jointly accredited by the Accreditation Council for Continuing Medical Education (ACCME), the Accreditation Council for Pharmacy Education (ACPE), and the American Nurses Credentialing Center (ANCC), to provide continuing education for the healthcare team. This activity is approved for 1 AMA PRA Category 1™ Credit.
Nursing ANCC	Nurses	In support of improving patient care, this activity has been planned and implemented by the Population Health Learning Center and the California Primary Care Association. The California Primary Care Association is jointly accredited by the Accreditation Council for Continuing Medical Education (ACCME), the Accreditation Council for Pharmacy Education (ACPE), and the American Nurses Credentialing Center (ANCC), to provide continuing education for the healthcare team. This activity is approved for 1 ANCC contact hour.
ASWB ACE Credits	Social Workers	In support of improving patient care, this activity has been planned and implemented by the Population Health Learning Center and the California Primary Care Association. The California Primary Care Association is approved to offer social work continuing education by the Association of Social Work Boards (ASWB) . Approved Continuing Education (ACE) program. Organizations, not individual courses, are approved under this program. Regulatory boards are the final authority on courses accepted for continuing education credit. Social workers completing this course will receive 1 credit.



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Introduce Yourself in the Chat

1	Your Name	Type your first and last name
2	Your Role	E.g. Medical Director, Care Manager, Medical Assistant
3	Your Organization	Practice Name
4	What brings you here today?	Tell us one thing you're hoping to learn about referral pathways or CBO partnerships.



Alison Tudor

MPH

CaAIM & Independent
Consultant

alison@noetic.consulting

Alison Tudor provides technical assistance and implementation support to county human services and behavioral health agencies, healthcare providers, and community-based organizations on CaAIM & CYBHI implementation.

Drawing on over 18 years of nonprofit leadership experience in behavioral health, foster youth services, and domestic violence programming, she brings an understanding of service delivery operations and the organizational capacity required for sustainable Medi-Cal integration.

She holds an MPA from University of Colorado Denver where her focus was on Gender-Based Violence.



Agenda Overview

- Navigate CalAIM referral pathways
- Closed-Loop Referrals
- Strategies for formalizing CalAIM provider partnerships
- Co-location Model
- Learn from Santa Clara School-Based Health Center

Understanding CalAIM: What is it?

CalAIM is a System of Care,
not just a list of programs.

CalAIM: California Advancing & Innovating Medi-Cal

- Why Transform Medi-cal?
 - Members often have complex health conditions
 - Multiple delivery systems can be complicated
 - High need = High Cost

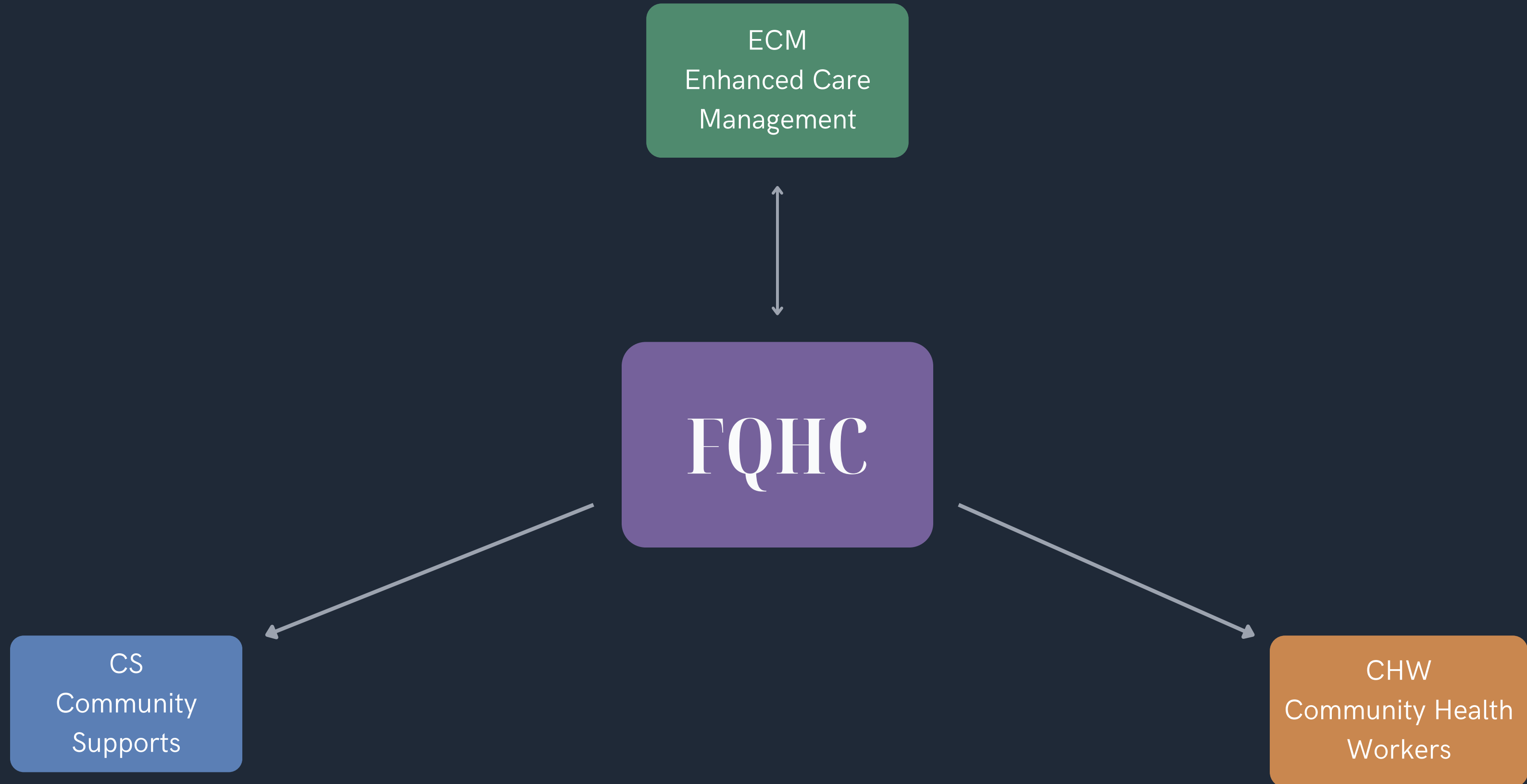
Address CA's
physical &
mental health
needs

Improve &
integrate care
for
Californians

Be a catalyst
for equity &
justice

Work together
to build a
healthier state

FQHC's & CalAIM



Referral Pathways

How can my practice access CalAIM services for patients?



Providers & community referral partners identify individuals eligible for CalAIM services



Individuals & families can also access services through self-referrals



MCPs may also use member data to identify eligible individuals



Managed Care Plan

Closed-Loop Referral Process

- Closed-Loop Referral (CLR) means that a referral is tracked, supported, monitored, and reaches a “known-closure”.
- CLR was mandatory July 1, 2025.
- Across the state, referrers are often reporting back that they do not hear from the MCP regarding the status of the referral.
- Your organization may be able to go into the MCP portal and see if there is an assigned CalAIM provider.
- You can also call the MCP CalAIM team and ask for a status update.



How can my practice access CalAIM services for patients?



Practitioner identifies individuals eligible for ECM, CS, CHW



Practitioner discusses CalAIM services with patient



Practitioner makes a referral to the MCP or to a CalAIM provider directly



Practitioner is a part of the care team

Practice as a Referring Entity

Direct MCP Referral

- Establish potential eligibility keeping in mind Community Supports vary between MCPs
- Each MCP has their own preferred method for referrals.
- DHCS has created a standardized ECM referral form that many MCPs will accept; Community Supports do not have a standardized referral form.



Direct CalAIM Provider Referral

- Establish potential eligibility keeping in mind Community Supports vary between MCPs
- Each CalAIM Provider likely has a different referral method, but likely more referral pathways than an MCP
- This referral pathway may connect you patient to services more quickly



How to make a successful referral

1. Patient Identification- Understand eligibility requirements
2. Determine CalAIM providers in your area OR determine Referral Process for MCP(s) in your area
3. Determine Referral Process for MCP(s) or Providers in your area
4. Create a Workflow- Build in eligibility screenings & determine best way to follow up on referral

How to determine referral pathway

- There really is no wrong or right way to refer someone to CalAIM services, but there are some things to consider. Responses will vary based on you community:

Do you want to connect your patient to services quickly?

Are you unsure of a patient's eligibility?

Does your patient need both ECM & CS?

Do you need a referral process that isn't overly burdensome?

Do you need to know the outcome of the referral?

Strategies for Formalizing Partnerships



Develop Referral Pathways with local organizations

- Use your MCP(s) Provider Directory to determine what CalAIM providers are active in your area
- Determine which organizations have a local presence
- Host a 'Meet & Greet' where your providers can meet the CalAIM providers
OR set up individual meetings
 - Learn the CalAIM services they provide
 - Learn the languages they speak
 - Learn about their referral processes

Strategies for Formalizing Partnerships



Consider a Co-Location Model

Once you have identified a trusted partner, you could embed them at your facility. An agreement should be put in place that outlines:

- Purpose of the co-location
- The space provided
- Workflow
- Data-Sharing
- Budget
- Performance Expectations

How can my practice access CalAIM services for patients?



Practitioner identifies individuals eligible for ECM



Practitioner discusses CalAIM services with patient



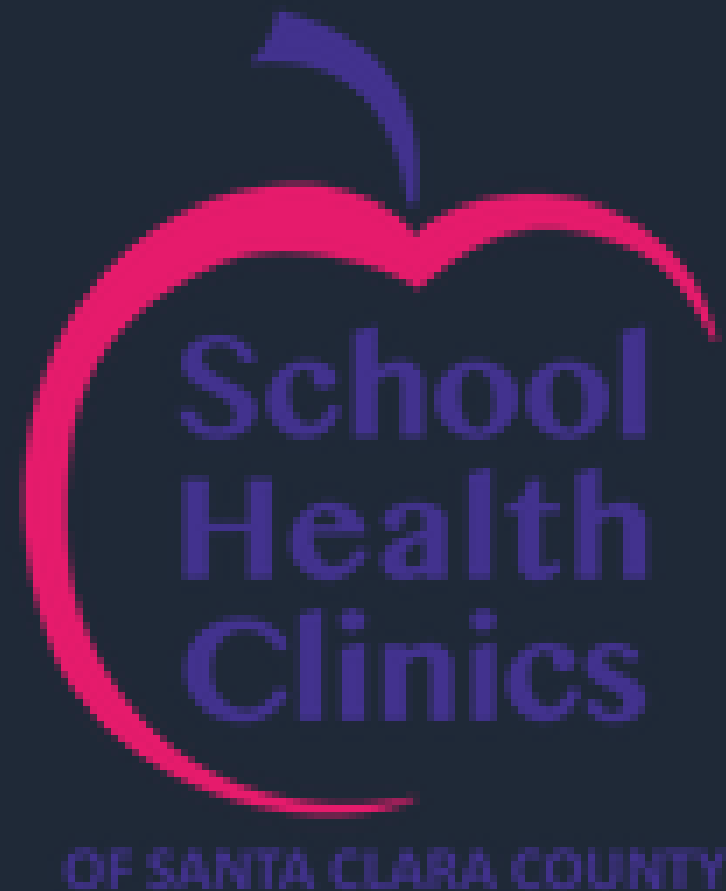
Practice submits a TAR for services



Lead Care Manager provides contracted services

Practice as a Provider

Provider Spotlight



Rose Anne Pierre, DrPH, MPH- CalAIM Program Director, Care Coordination Manager

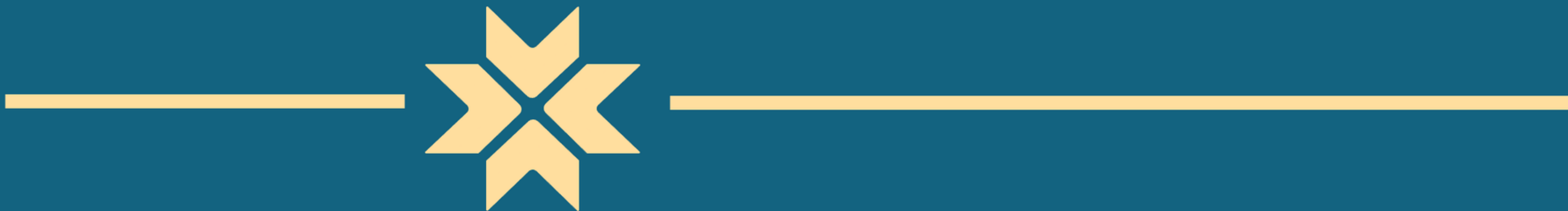
Addie Nurrachmayani, MS-HCA- Quality Improvement Director, Clinical Content Builder, ESA

Barbara Estrada-Reyes, CHW- Community Health Partnership

Questions?



Close & Next Steps



Evaluation

Please fill out the evaluation.

Chose **Part 2A** on
Tuesday, August 18 as the
date.

**When completing the
evaluation, you will need to
confirm that you would like to
receive CECs and provide the
necessary information to
receive them.**

The link will be posted in
the chat and shared in the
follow up email.

Would you like Continuing Education Credits? *

☒ Yes

☐ No

What type of CECs are you requesting? *

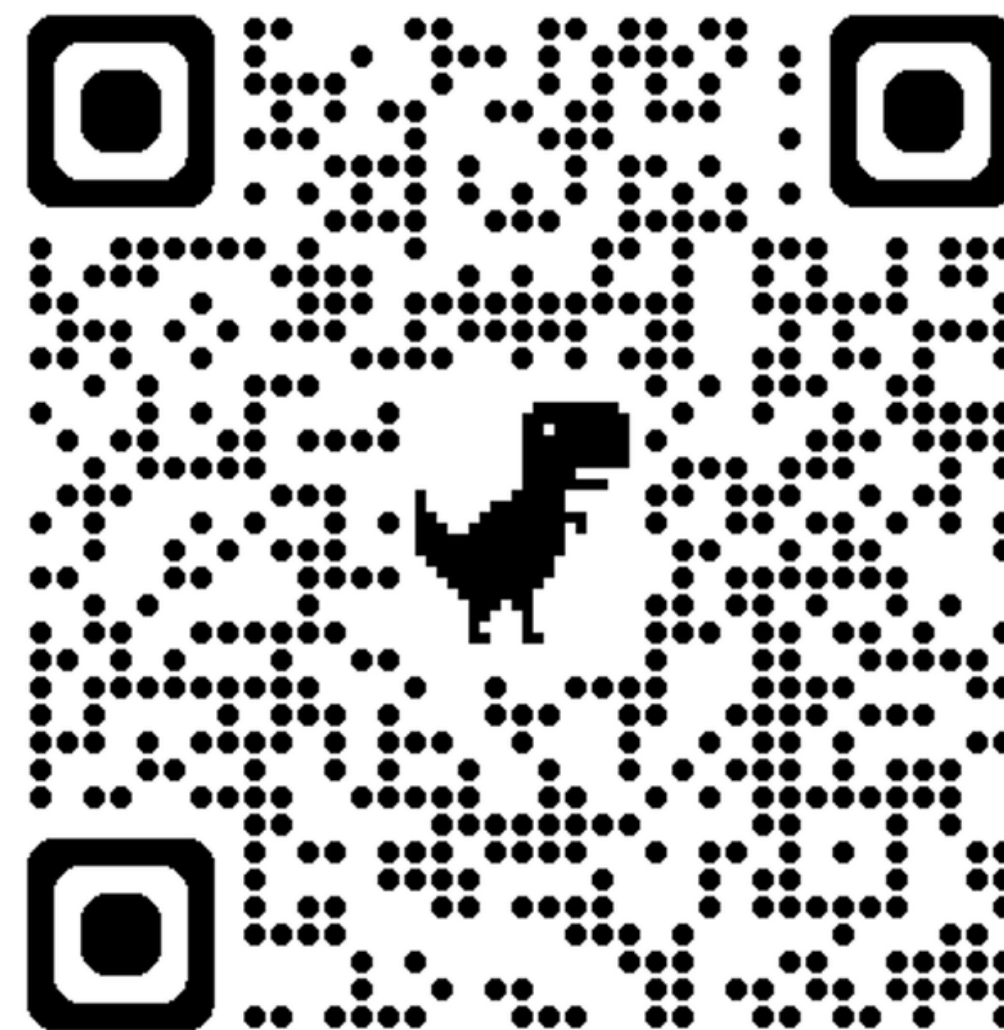
What is your license number? *

First Name *

Last Name *

Email *

Organization *



Key Reminders

01 Interim Submission Window

The optional Interim Submission Window for BH & HRSN deliverables is now open in the portal and will remain active through August 31. Submitting early allows your practice to receive, direct non-binding feedback before the formal fall deadline.

02 One-on-One Coaching

30-minute 1:1 coaching sessions, available for BH, HRSN and VBP only, run now through September. It can be tailored to whatever your practice needs most, refining a workflow, getting feedback on a deliverable draft, or troubleshooting an operational hurdle.

03 Office Hours

Our August Office Hours session on **August 25 has been canceled**. For tailored support with your BH, HRSN, or VBP deliverables, please book a 1:1 coaching session.

04 Final Learning Community

Please register for our Final Learning Community Part 1 & Part 2

Part 1 (select one)

- Session A: Tuesday, September 29 | 3:00 – 5:00PM
- Session B: Thursday, October 1 | 11:00 – 1:00PM

Part 2 (select one)

- Session A: Tuesday, October 6 | 3:00 – 5:00PM
- Session B: Thursday, October 8 | 11:00 – 1:00PM

Thank you!

Alison Tudor
alison@noetic.consulting

