



Dear Case Manager,

BUS Data Migration Strategy: Background and Constraints

The original data migration strategy for members with data in the Benefits Utilization System (BUS) was to migrate only “active” BUS member data with all case statuses excluding “closed,” as of January 1, 2020, or later.

During the data migration testing in June 2023, it was determined that members created before January 1, 2020, with a case status of “open” with any agency (primary or secondary) would not migrate in the July 2023 Go Live. Basing Go Live data migration from the BUS on the “most recent” case status recorded by a primary agency was not possible as the case statuses recorded by secondary agencies could have been closed recently while the primary agency case status remained open and unchanged.

It was decided to move all members regardless of case status because of these constraints and the need to migrate all current members. This ensures all current members are migrated.

Member Assignment in the Care and Case Management (CCM) System Based on Legacy System Data

Members are assigned to case managers in the CCM system based on the member history below:

- The case manager who documented a case status in the BUS
- The case manager who documented a program area in the BUS since 1/1/2020
- The case manager who was assigned in the Case Management tab in the BUS
- The case manager who was assigned in DDDWeb

Resolution

Navigate to the Member Record > Case Management > Program Screen to remove a member who should not be listed on a case manager’s Dashboard. Navigate to any program card(s) that have the case manager listed erroneously on the Program Summary screen in the “Case Manager/CM Supervisor” field and remove or change the name of the case manager, as appropriate, and save. This will remove that member from the Dashboard of that case manager as long as there are no member programs associated with that case manager.

To remove a case manager erroneously listed on a member record Care Team > Staff Member screen, navigate to that Staff Member > Staff screen for the case manager and enter a date in the “end date” field, as appropriate, and save. If the case manager is identified as primary (“Primary” toggle switch in the “Yes” position) then also move the toggle switch to “No” position. This will

remove that case manager from the "Active" view and into the "Closed" view on the Staff Member screen. As long as a case manager is not listed as "Primary" the member will not appear on the case manager's caseload in the Department 01 or Agency 09 reports.

These actions can be completed by anyone who has a Case Manager, Case Manager Supervisor, or CMA Administrator role. The Department of Health Care Policy & Financing is exploring how it may be able to support agencies with the cleanup effort.

Contact the [Provider Services Call Center](#) with any questions or requests for support. **Callers are reminded to wait until the virtual agent asks for a Provider ID number before stating "Case Manager."** Callers are encouraged to provide detailed information regarding the issue(s) being experienced and record the Call Tracking Number (CTN) as provided by the Provider Services Call Center Agent at the end of the call.

Thank you,

Department of Health Care Policy & Financing