



Dear Case Manager,

July 1, 2024, marked the completion of Phase III of Case Management Redesign (CMRD) member transitions. There was a substantial movement of members among agencies based on their county of residence and cleanup of old case manager profiles, some of which were created when agencies were still using the Benefits Utilization System (BUS) and were brought over as a necessary part of data migration.

- Escalations about caseload assignment and requests to assign members are being received by the Care and Case Management (CCM) Support Center.
- The Department of Health Care Policy & Financing (the Department) wants to provide more context for some of the changes that case managers may be seeing in the CCM System, and what to do when action is needed.

Impacts of CMRD on case managers

- Members who did not have any case management activity in the last two years were put into an "inactive" status, meaning case managers no longer have access to these records. Through the preliminary Member Transition List review efforts during Case Management Redesign, opportunities were provided for agencies to indicate that these members needed to remain in an "active" status.
- Case managers report that the incorrect case manager name is on Program Cards. Maintenance of this data point is a required task of case managers.
 - If there was not an active case manager on the Program Card for an active member, the agency's designated contact for transitions was assigned to the Program Card accordingly.
 - If there was not an active case manager on the Program Card for an active member, the agency's designated contact for transitions was assigned to the Program Card.
 - Case managers that had their name end-dated from the Program Card likely had an older profile attached to the record. When the older profiles were cleaned up or removed, the agency's designated contact was added.

Requested action for case managers:

- Case managers are responsible for verifying members' status against the Final Member Transition Lists to evaluate what may have happened to the member record and to determine if access is truly required before requesting access to an orphaned record from the Support Center or from another agency.
- If you do not have access to this file, please contact the designated lead at your agency for Case Management Redesign.
- Obtain access to member records using the following options:
 - ***Members who are orphaned/are not affiliated with an agency:*** Request access from the [CCM Support Center](#).
 - ***Members assigned to another agency:*** Request access from the agency. Please note it is important to coordinate with the other agency as the CCM Support Center cannot move an active member from one agency to another.

A version of this communication has been provided to agency leadership.

Thank you,

The Department of Health Care Policy & Financing
