

HCPF Escalations

Partner Integration - Cohort #1

Part 1 Meeting
10/16/2025

What Should Be Completed in Bright

- Part 1 Module - Navigation
 - ☐ Escalation Ticket Components
 - ☐ Escalation Tab Review
 - ☐ Salesforce Navigation
 - ☐ Citizen's Details Page
 - ☐ Case Details Page
- Review & download all resources included in this section!
- REMINDER: All trainings must be completed by 10/30/25 to get access to Salesforce!

Escalation Ticket Components

Escalation Ticket Components

- In the Escalation Ticket Components module, you reviewed the different components and fields of an Escalation Ticket in each of the following sections:
 - Ticket Header
 - Special Indicators
 - Ticket Status Flow
 - Citizen Details
 - Activity and Correspondence
 - Related List Quick Links
 - Case Information & Ticket Details
 - Webform Submission Details
 - Description
 - Tier 1 (HCPF Specialists, Counties, & CMAs)
 - Across HCPF Tracking
 - Tier 2 (HCPF SME Specialists)
 - Root Cause Analysis
 - System Information
 - Ticket Details
- We will briefly cover these sections together, as well as review some best practices in Salesforce!

Escalation Ticket Components

- Ticket Header section
 - Top section of Escalation Ticket that which contains a quick summary of ticket data, as well as some internal functionalities.
- Flags/Notice on Case and Citizens (Special Indicators)
 - Banner that alerts ticket owners of any contacts or cases that require specific attention or actions.

The screenshot displays the HCPF Ticket interface. At the top, there is a search bar and navigation tabs for 'HCPF' and 'Tickets'. The 'Tickets' tab is active, showing a dropdown menu with '04007974 | Ticket' selected. Below this, the 'Ticket 04007974' header is visible, including a '+ Follow' button and links for 'Create MCC Dental Ticket', 'Edit', 'Change Owner', and 'View Ticket Hierarchy'. A table below the header lists ticket details:

Case Number	State ID_From Citizen	Status	Ticket Type	Date/Time Opened
1BTrain	U111111	TA: New	Tier1	9/15/2025 1:39 PM

Below the table, a red banner displays the text: '***** FLAG ON CASE NUMBER ***** READ NOTICE ON CASE Number *****'. At the bottom, there is a 'Citizen Details' section with a dropdown menu and a series of buttons for ticket status: 'TA: New', 'TA: Pendi...', 'TA: Intern...', 'TA: Not S...', 'T1: Pendi...', 'T1: In Pro...', 'T1: Count...', and 'T1: S'.

This screenshot is identical to the one on the left, showing the HCPF Ticket interface for ticket 04007974. It includes the same search bar, navigation tabs, ticket header with buttons, data table, red banner flag, and citizen details section.

Escalation Ticket Components

- Ticket Status Flow/Progression of an Escalation Ticket
 - TA: New
 - TA: Pending Ticket Assignment
 - TA: Internal Queue Reassignment
 - TA: Not Successfully Assigned - Non-Medical Assistance Related
 - T1: Pending Initial Review
 - T1: In Progress with Ticket Owner
 - T1: County/CMA Review
 - T1: Successfully Resolved
 - T1: Not Successfully Resolved
 - T2: Pending Initial Review
 - T2: In Progress with Ticket Owner
 - T2: Successfully Resolved
 - T2: Not Successfully Resolved
 - Closed

The screenshot displays a web application for managing tickets. At the top, there is a search bar and a navigation menu. Below the search bar, the ticket number '7974' is shown with a dropdown menu. A row of buttons includes '+ Follow', 'Create MCC Dental Ticket', 'Edit', 'Change Owner', and 'View Ticket Hierarchy'. The 'e/Time Opened' field shows '5/2025 1:39 PM'. A red banner with the text '***** FLAG ON CASE NUMBER ***** READ NOTICE ON CASE Number *****' is visible. Below this, a horizontal flow of status buttons is shown: 'TA: New' (highlighted with a red border), 'TA: Pendi...', 'TA: Intern...', 'TA: Not S...', 'T1: Pendi...', 'T1: In Pro...', 'T1: Count...', 'T1: Succe...', 'T1: Not S...', 'T2: Pendi...', 'T2: In Pro...', and 'T2: Succe...'. Below the flow, the 'Status: TA: New' is displayed, and a 'Mark Status as Complete' button is visible. At the bottom, there is a 'New Task' section with a 'Post' button, a 'Ticket Comment' field, and a 'Close Ticket' button. A 'Create a task...' field and an 'Add' button are also present.

Escalation Ticket Components

- Citizen Details section
 - Provides additional information for the individual listed as the Contact in Case Information & Ticket Details.
- Activity and Correspondence section
 - Tracks all incoming/outgoing external communication, all internal communication, and all ticket activity.

Search...

HCPF Tickets

Ticket 04007974

+ Follow Create MCC Dental Ticket Edit Change Owner View Ticket Hierarchy

Case Number	State ID From Citizen	Status	Ticket Type	Date/Time Opened
18Train	U11111	TA: New	Tier1	9/15/2025 1:39 PM

***** FLAG ON CASE NUMBER ***** READ NOTICE ON CASE Number *****

T1: New T1: Pending T1: Internal T1: Not S... T1: Pending T1: In Pro... T1: Count... T1: Success... T1: Not S...

Status: TA: New

✓ Mark Status as Complete

New Task Post Ticket Comment Close Ticket

Create a task... Add

Related List Quick Links

- Emails (0)
- Google Docs & Attachments (0)
- Ticket History (3)
- Ticket Status Histories (3)

Related Details Chatter Activity

Case Information & Ticket Details

Ticket Number 04007974 Ticket Owner Escalation Ticket Queue

Search...

HCPF Tickets

Ticket 03954237

+ Follow Create MCC Dental Ticket Edit Change Owner View Ticket Hierarchy

Case Number	State ID From Citizen	Status	Ticket Type	Date/Time Opened
18Train	U11111	Closed	INTERNAL USE ONLY - Invalid Request	7/14/2025 7:19 PM

***** FLAG ON CASE NUMBER ***** READ NOTICE ON CASE Number *****

T1: Pending T1: In Pro... T1: Success... T1: Not S... T2: Pending T2: In Pro... T2: Success... T2: Not S... Closed

Status: Closed

✓ Mark Status as Complete

New Task Post Ticket Comment Close Ticket

Write an email... Compose

Related Details Chatter Activity

Case Information & Ticket Details

Ticket Number 03954237 Ticket Owner Angela Eiler

Contact Name Jon Snow Status Closed

Subject TEST TICKET Ticket Type INTERNAL USE ONLY - Invalid Request

Ticket Sub-Type County Action

New Member from Web Form

Escalation Ticket Components

- Related List Quick Links section
 - Offers Ticket Owners a quick way to navigate to other tables and sections.
- Case Information and Ticket Details section
 - Contains all information regarding the member in question, the tier of the ticket, and the entities involved.

The screenshot shows the HCPCF Tickets interface. At the top, there's a search bar and a navigation bar with 'HCPCF' and 'Tickets'. Below the navigation bar, there's a 'Create a task...' button. The main content area is divided into two sections: 'Ticket Details' on the left and 'Related List Quick Links' on the right. The 'Ticket Details' section includes fields for Contact Name (Jon Snow), Status (TA: New), Subject (TEST TICKET), Ticket Sub-Type, Description (TEST TICKET), and County Action. The 'Related List Quick Links' section, highlighted with a red box, contains links for Emails (0), Google Docs & Attachments (0), Ticket History (3), and Ticket Status Histories (3). Below this, there's a 'Case Information & Ticket Details' section with tabs for Related, Details, Chatter, and Activity. The 'Details' tab is selected, showing fields for Ticket Number (04007974), Ticket Owner (Angela Eiler), Contact Name (Jon Snow), Status (Closed), Case Number (18Train), Relation to Member, Authorized Representative?, 3rd Party Form Effective Date, 3rd Party Form Expiration Date, Program Name, Ticket Type (INTERNAL USE ONLY - Duplicate Ticket), Tier1 SME Area, Subject (Member Complaint TEST), and Eligibility Site.

This screenshot shows a detailed view of the 'Case Information & Ticket Details' section, which is highlighted with a red box. It contains a comprehensive list of fields for a ticket, organized into two columns. The left column includes fields like Ticket Number (03235069), Contact Name (Jon Snow), Case Number (18Train), Relation to Member, Authorized Representative?, 3rd Party Form Effective Date, 3rd Party Form Expiration Date, Program Name, Ticket Type (INTERNAL USE ONLY - Duplicate Ticket), Tier1 SME Area, and Subject (Member Complaint TEST). The right column includes fields like Ticket Owner (Angela Eiler), Status (Closed), New Member from Web Form, State ID (U111111), Web Form State ID (Letter + 6 Digits), Aid Code Category (MAGI), Aid Code/ Program (MAGI Adult), County of Incident (Jefferson), County Size (Large), CMA, Eligibility Site, Tribe, and Other Agency or Contractor. Each field has an edit icon next to it.

Escalation Ticket Components

- Webform Submission Details section
 - Lists the submitter's contact information and preferred method of contact for updates.
- Description section
 - Brief summary of the escalation/grievance.

Webform Submission Details

SuppliedCompany	Receive updates? ⓘ
HCPF	Yes
Web Name	Preferred Method of Contact ⓘ
Angela Eiler	Email
Web Email	Date of Incident ⓘ
angela.eiler@state.co.us	
SuppliedPhone	

Description

Web Name: Angela Eiler

Web Email: angela.eiler@state.co.us

SuppliedPhone:

Preferred Method of Contact ⓘ: Email

Date of Incident ⓘ:

Description ⓘ: TEST TICKET

Tier 1 (HCPF Specialists, Counties, & CMAs)

Escalation Ticket Components

- Tier 1 (HCPF Specialists, Counties, & CMAs) section
 - Houses all resolution, transfer, research, and priority information for internal Tier 1 specialists and County/CMA users.
- Across HCPF Tracking section
 - Tracks tickets related to various internal HCPF projects.

▼ Tier 1 (HCPF Specialists, Counties, & CMAs)

Tier1 Resolution Description ⓘ	Tier1 Priority ⓘ Medium
Reassigned to Tier? ⓘ	Tier1 Priority Level ⓘ
Tier2 SME Area ⓘ	Tier1 Resolution Due Date ⓘ 10/28/2025
Reassigned to County/ CMA? ⓘ	County of Incident ⓘ Jefferson
County/ CMA Subject Area ⓘ	CMA ⓘ
CMA Research ⓘ	County/ CMA Priority ⓘ
CMA Action Item ⓘ	County/ CMA Priority Level ⓘ
County Research ⓘ	County/ CMA Resolution Due Date ⓘ
County Action Item ⓘ	

▼ Across HCPF Tracking

Access Rule ⓘ	Department of Justice ⓘ
Cover All Coloradans ⓘ	Rapid Reintegration ⓘ

▼ Tier 2 (HCPF SME Specialists)

Tier2 Resolution Description ⓘ	Tier2 Priority ⓘ
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Escalation Ticket Components

- Tier 2 (HCPF SME Specialists) section
 - Houses all resolution and priority information for internal/external Tier 2 specialists.
- Root Cause Analysis section
 - Tracks primary root causes of the ticket of each entity involved.

▼ Tier 2 (HCPF SME Specialists)

Tier2 Resolution Description ⓘ

Tier2 Priority ⓘ

Tier2 Priority Level ⓘ

Tier2 Resolution Due Date ⓘ

▼ Root Cause Analysis

▼ Root Cause Analysis

Primary Root Cause - HCPF ⓘ

Primary Root Cause - Eligibility Site ⓘ

Primary Root Cause - County ⓘ

Primary Root Cause - CMA ⓘ

Enrollment

▼ System Information

Escalation Ticket Components

- System Information section
 - Houses all SLA data, ticket origin information, ticket connections, and dates of resolution.
- Ticket Details section
 - Summary of information populated from the Case Information & Ticket Details section.

System Information

Parent Ticket	Ticket Origin
Created By	Web
Angela Eiler, 10/8/2025 11:34 AM	Date/Time Closed
Date/Time Opened	Last Modified By
10/8/2025 11:34 AM	Angela Eiler, 10/8/2025 3:21 PM
HCPF Tier1 Date Resolved	TA Date Assigned
	10/8/2025 11:35 AM
County/ CMA Tier1 Date Resolved	RollUp - TA SLA in BH
	0.0036
Tier2 Date Resolved	Ticket Record Type
	Escalation Ticket
RollUp - T1 SLA in BD	
0.0000	
RollUp - County/ CMA SLA in BD	
0.0000	
RollUp - T2 SLA in BD	
0.0000	

Search...

HCPF Tickets 04007974 | Ticket More

U111111 1/1/1991

Related List Quick Links

- Emails (0)
- Google Docs & Attachments (0)
- Ticket History (3)
- Ticket Status Histories (3)

Ticket Details

Contact Name	Status
Jon Snow	TA: New
Subject	Ticket Type
TEST TICKET	Tier1
Ticket Sub-Type	County Action
Description	
TEST TICKET	

Details Chatter Activity

Case Information & Ticket Details

Ticket Number	Ticket Owner
04007974	Escalation Ticket Queue
Contact Name	Status
Jon Snow	TA: New
Case Number	New Member from Web Form
1BTrain	

Escalation Ticket Components: Best Practices!

Permissions

- County/CMA users have the ability to update the following fields on the ticket:

- Case Information & Ticket Details

- Contact Name
 - Case Number
 - Ticket Owner
 - Ticket Status
 - State ID/Web Form State ID
 - Aid Code Category
 - Aid Code/Program
 - County of Incident
 - CMA
 - Eligibility Site

The screenshot shows a 'Details' tab for a ticket. The form is divided into two columns. The left column contains fields for Ticket Number (03235069), Contact Name (Jon Snow), Case Number (18Train), Relation to Member, Authorized Representative?, 3rd Party Form Effective Date, 3rd Party Form Expiration Date, Program Name, Ticket Type (INTERNAL USE ONLY - Duplicate Ticket), Tier1 SME Area, Subject (Member Complaint TEST), and Other Agency or Contractor. The right column contains fields for Ticket Owner (Angela Eiler), Status (Closed), New Member from Web Form, State ID (U111111), Web Form State ID (Letter + 6 Digits), Aid Code Category (MAGI), Aid Code/ Program (MAGI Adult), County of Incident (Jefferson), County Size (Large), CMA, and Eligibility Site. Red boxes highlight the following fields: Contact Name, Case Number, Ticket Owner, Status, State ID, Web Form State ID, Aid Code Category, Aid Code/ Program, County of Incident, CMA, and Eligibility Site. Each highlighted field has an edit icon (pencil) next to it.

Permissions

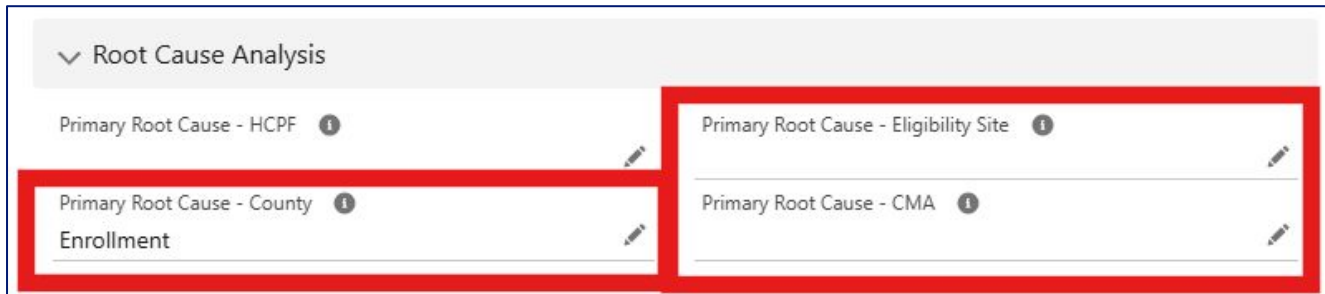
- County/CMA users have the ability to update the following fields on the ticket:
 - Tier 1 (HCPF Specialists, Counties, & CMAs)
 - Tier 1 Resolution Description
 - County/CMA Subject Area
 - County/CMA Priority
 - County/CMA Resolution Due Date

✓ Tier 1 (HCPF Specialists, Counties, & CMAs)

Tier1 Resolution Description ⓘ	Tier1 Priority ⓘ Medium
Reassigned to Tier2? ⓘ	Tier1 Priority Level ⓘ
Tier2 SME Area ⓘ	Tier1 Resolution Due Date ⓘ 10/28/2025
Reassigned to County/ CMA? ⓘ	County of Incident Jefferson
County/ CMA Subject Area ⓘ	CMA ⓘ
CMA Research ⓘ	County/ CMA Priority ⓘ
CMA Action Item ⓘ	County/ CMA Priority Level ⓘ
County Research ⓘ	County/ CMA Resolution Due Date ⓘ
County Action Item ⓘ	

Permissions

- County/CMA users have the ability to update the following fields on the ticket:
 - Root Cause Analysis
 - Primary Root Cause - County
 - Primary Root Cause - Eligibility Site
 - Primary Root Cause - CMA
 - System Information
 - Parent Ticket



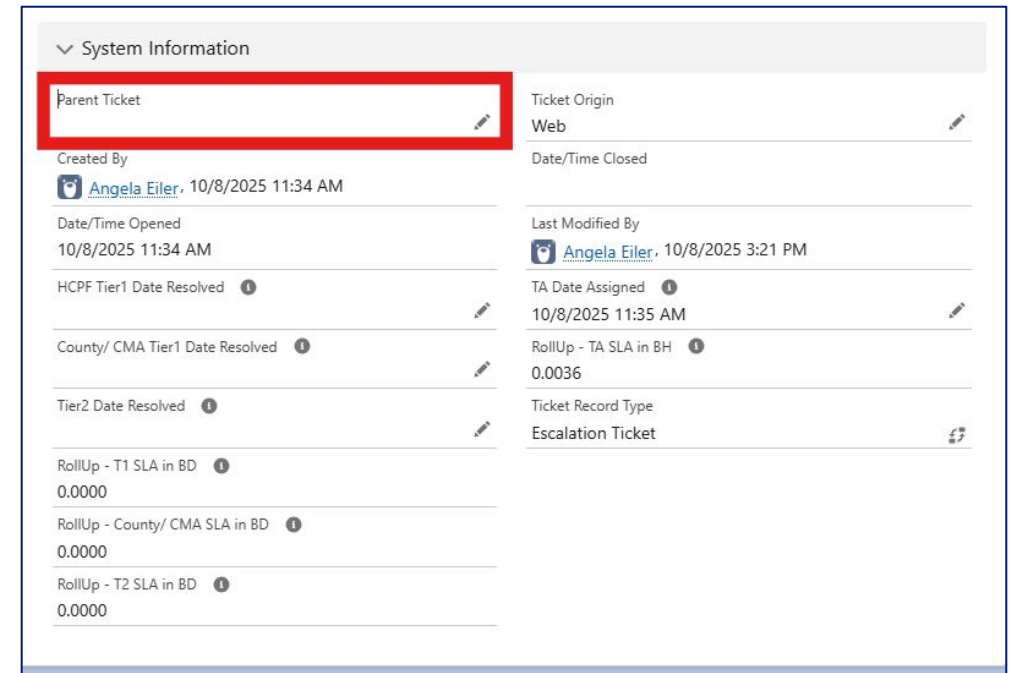
Root Cause Analysis

Primary Root Cause - HCPF ⓘ

Primary Root Cause - Eligibility Site ⓘ

Primary Root Cause - County ⓘ

Enrollment ⓘ



System Information

Parent Ticket ⓘ

Ticket Origin
Web ⓘ

Created By
Angela Eiler, 10/8/2025 11:34 AM

Date/Time Closed

Last Modified By
Angela Eiler, 10/8/2025 3:21 PM

TA Date Assigned ⓘ
10/8/2025 11:35 AM ⓘ

RollUp - TA SLA in BH ⓘ
0.0036

Ticket Record Type
Escalation Ticket ⓘ

HCPF Tier1 Date Resolved ⓘ

County/ CMA Tier1 Date Resolved ⓘ

Tier2 Date Resolved ⓘ

RollUp - T1 SLA in BD ⓘ
0.0000

RollUp - County/ CMA SLA in BD ⓘ
0.0000

RollUp - T2 SLA in BD ⓘ
0.0000

Anonymous Anonymous - CR

- A contact you may see on incoming tickets is “Anonymous Anonymous - CR”. This is a dummy contact created by the Salesforce Team to be utilized for the following scenarios:
 - If a member has a closed case in CBMS, and is not a contact option in the HCPF Salesforce instance. In this case, the Ticket Assigner/Tier 1 user will list the member’s State ID in the corresponding fields, or in another area of the ticket.
 - If the ticket is about multiple Medicaid members. In this case, the Ticket Assigner/Tier 1 user will document all the member information in another area of the ticket.
 - If the member in question is truly anonymous. For example, an anonymous complaint regarding customer service.

Related	Details	Chatter	Activity
▼ Case Information & Ticket Details			
Ticket Number 04046157		Ticket Owner Billy Thompson	
Contact Name Anonymous Anonymous-CR		Status T1: Pending Initial Review	
Case Number Anonymous Anonymous-CR Account MASTER		New Member from Web Form Yes	
Relation to Member Self		State ID	
Authorized Representative? No		Web Form State ID (Letter + 6 Digits)	
3rd Party Form Effective Date		Aid Code Category	

Updating the Status

- The status on Escalation Tickets can be updated two ways:
 - A) **RECOMMENDED**: Updating the status in the Case Information & Ticket Details section.
 - B) Selecting the status on the Ticket Status Flow and selecting “Mark as Current Status”.

A)

Related Details Chatter Activity

Case Information & Ticket Details

Ticket Number: 04007974

Contact Name: Jon Snow

Case Number: 18Train

Relation to Member

Authorized Representative?

3rd Party Form Effective Date

3rd Party Form Expiration Date

Program Name

Ticket Type: Tier1

Tier1 SME Area

Escalations - Billing/Coverage

Subject: TEST TICKET

Ticket Owner: Escalation Ticket Queue

Status: TA: New

New Member from Web Form

State ID: U111111

Web Form State ID (Letter + 6 Digits)

Aid Code Category

Aid Code/ Program

County of Incident: Jefferson

County Size: Large

CMA

Eligibility Site

Tribe

Other Agency or Contractor

B)

04007974 | Ticket

+ Follow Create MCC Dental Ticket Edit Change Owner View Ticket Hierarchy

Date/Time Opened: 9/15/2025 1:39 PM

***** FLAG ON CASE NUMBER ***** READ NOTICE ON CASE Number *****

TA: New TA: Pending Ticket Assignment TA: Intern... TA: Not S... T1: Pendi... T1: In Pro... T1: Count... T1: Succe... T1: Not S... T2: Pendi... T2: In Pro...

Status: TA: Pending Ticket Assignment

Mark as Current Status

New Task Post Ticket Comment Close Ticket

Create a task... Add

Related List Quick Links

- Emails (0)
- Google Docs & Attachments (0)
- Ticket History (3)
- Ticket Status Histories (3)

Don't Touch the Citizen Details Box!

- The Citizen Details box on the left hand side of the ticket page layout provides additional information for the individual listed as the Contact in Case Information & Ticket Details. Once a Contact is entered, their information in Salesforce will automatically populate in the Citizen Details box.
- **THIS BOX IS FOR YOUR REFERENCE, AND NOT FOR YOU TO UPDATE TICKET INFORMATION!** If you need to update the Contact, State ID, etc. please do so in the Details section of the ticket.
- If any information is updated in this box, the information will carry over to their Citizen Detail Page and impact every other HCPF ticket that the contact is listed on!
- This requires technical assistance from the HCPF Salesforce Team to fix.

The screenshot displays a Salesforce ticket interface. At the top, a red banner reads: "***** FLAG ON CASE NUMBER ***** READ NOTICE ON CASE Number *****". Below this, a progress bar shows stages: T1: Pendi... (active), T1: In Pro..., T1: Count..., T1: Succe..., T1: Not S..., T2: Pendi..., and T2: In Pro... with navigation arrows. The status is "T1: Pending Initial Review" with a "Mark Status as Complete" button. Below the status bar are tabs for "Email", "New Task", "Post", "Ticket Comment", and "Close Ticket". An email composition area includes a "Write an email..." text box and a "Compose" button. At the bottom, there is a "Related List Quick Links" section. On the left side of the interface, the "Citizen Details" box is highlighted with a red border. It contains the following information:

Citizen Details	
Name	Preferred Email
Jon Snow	
Case Number	Preferred Phone
18Train	(720) 334-5260
Coverage Status	Date of Birth
PASS	1/25/1990
State ID	Encryption Exception
U111111	☒

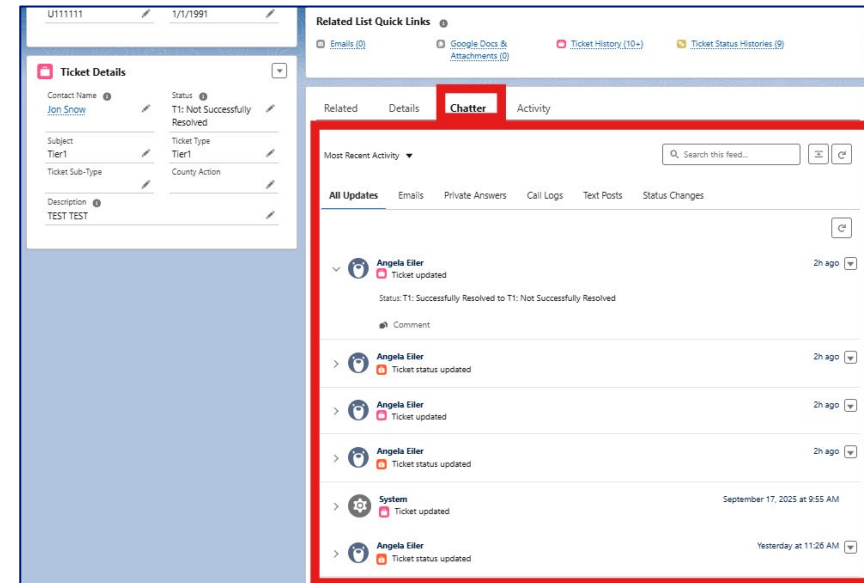
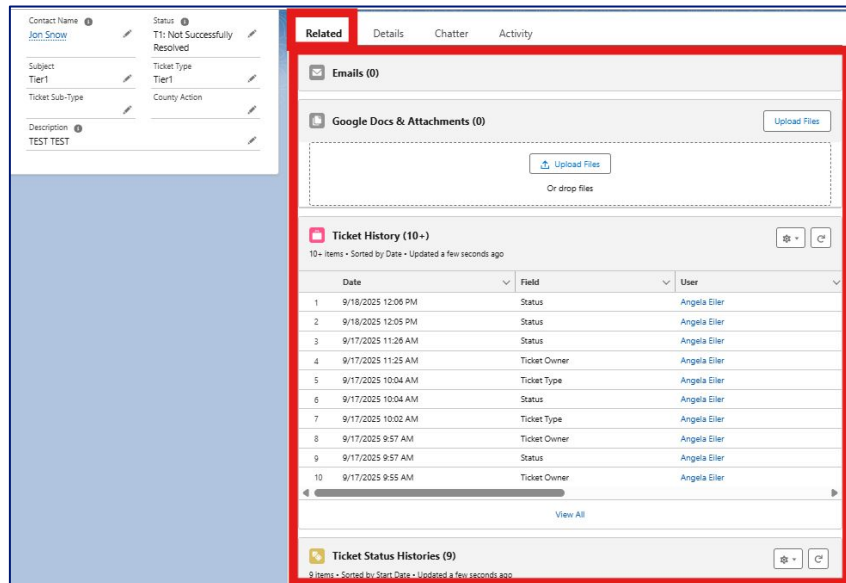
Escalation Tab Review

Escalations Tab Review

- In the Escalations Tab Review module, you reviewed the following tabs in Salesforce:
 - Related Tab
 - Chatter Tab
 - Activity Tab
 - Additional Items
- We will briefly cover these tabs together, as well as review some best practices in Salesforce!

Escalations Tab Review

- Related Tab
 - Lists all email correspondence, attachments, and ticket history that is associated with the ticket the user is currently viewing
- Chatter Tab
 - Allows users to review all ticket updates/changes, incoming/outgoing email correspondence, posts, and ticket comments.



Escalations Tab Review

- Activity Tab
 - Allows users to view the system changes and history of the ticket
- Additional Items
 - Functionalities built into an Escalation Ticket that Tier 1 and Tier 2 users **should not** utilize.
 - New Task
 - Close Ticket

Ticket Details

Contact Name: Jon Snow
Status: T1: Not Successfully Resolved
Subject: Tier1
Ticket Type: Tier1
Ticket Sub-Type: County Action
Description: TEST TEST

Activity

Ticket History (10+)
10+ Items • Sorted by Date • Updated a few seconds ago

	Date	Field	User
1	9/18/2025 12:06 PM	Status	Angela Eiler
2	9/18/2025 12:05 PM	Status	Angela Eiler
3	9/17/2025 11:26 AM	Status	Angela Eiler
4	9/17/2025 11:25 AM	Ticket Owner	Angela Eiler
5	9/17/2025 10:04 AM	Ticket Type	Angela Eiler
6	9/17/2025 10:04 AM	Status	Angela Eiler
7	9/17/2025 10:02 AM	Ticket Type	Angela Eiler
8	9/17/2025 9:57 AM	Ticket Owner	Angela Eiler
9	9/17/2025 9:57 AM	Status	Angela Eiler
10	9/17/2025 9:55 AM	Ticket Owner	Angela Eiler

View All

Email **New Task** Post Ticket Comment **Close Ticket**

Write an email... **Compose**

Escalation Tab Review: Best Practices!

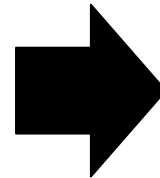
Viewing Full Emails

- To bring up a full preview of an incoming/outgoing email, click on the blue hyperlink in the Subject column with viewing the Email table.

 **Emails (7)**
7 items • Sorted by Message Date • Updated a few seconds ago

	Subject	From Address	To Address	Message Date
1	Encrypt HCPF County Relations Ticket 03235069: Mem...	hcpf_county_membercomplaints@state.co...	angela.eiler@state.co.us	9/25
2	RE: ENCRYPT RE: Member Complaint TEST [thread:xs...	hcpf_county_membercomplaints@state.co...	angela.eiler@state.co.us	9/20
3	RE: ENCRYPT RE: Member Complaint TEST [thread:xs...	hcpf_county_membercomplaints@state.co...	angela.eiler@state.co.us	9/20
4	ENCRYPT RE: Member Complaint TEST [thread:xsSQ4...	hcpf_membercomplaints@state.co.us	angela.eiler@state.co.us	10/9
5	RE: Member Complaint TEST [thread:xsSQ4Hmdf5mR...	hcpf_membercomplaints@state.co.us	angela.eiler@state.co.us	10/4
6	RE: Member Complaint TEST [thread:xsSQ4Hmdf5mR...	hcpf_membercomplaints@state.co.us	angela.eiler@state.co.us	10/4
7	Member Complaint TEST	angela.eiler@state.co.us	hcpf_membercomplaints@state.co.us	8/25

[View All](#)



03235069 | Ticket RE: Mem...

 **RE: Member Complaint TEST [thread:xsSQ4Hmdf5mRHEtby5iaj0::]**

Message Details

 **From:** HCPF CountyMemberComplaints
To: angela.eiler@state.co.us **Bcc:** angela.eiler@state.co.us 6:04 PM | Oct 4, 2023

TEST

----- Original Message -----
From: Eiler - HCPF, Angela [angela.eiler@state.co.us]
Sent: 8/25/2023 1:16 PM
To: hcpf_membercomplaints@state.co.us
Subject: Member Complaint TEST

TEST

...
Angela Eiler
Program Assistant II
Policy, Communication, Administration Office

 **COLORADO**
Department of Health Care
Policy & Financing

P 303.866.5132 | F 303.866.4517 | State Relay: 711
1570 Grant Street, Denver, CO 80203
angela.eiler@state.co.us | [Colorado.gov/hcpf](https://colorado.gov/hcpf)

 **Onspring**
v30

Chatter Icons

- Briefcase icon
 - Indicates a ticket update. Lists the fields on the ticket that were updated, showing the old and new values. Also shows which Salesforce user created the change.
- Speech bubble
 - Indicates Post or Ticket Comment created by Salesforce user.
- Envelope icon
 - Indicates incoming and/or outgoing email correspondence. Also shows which user/individual sent the email.



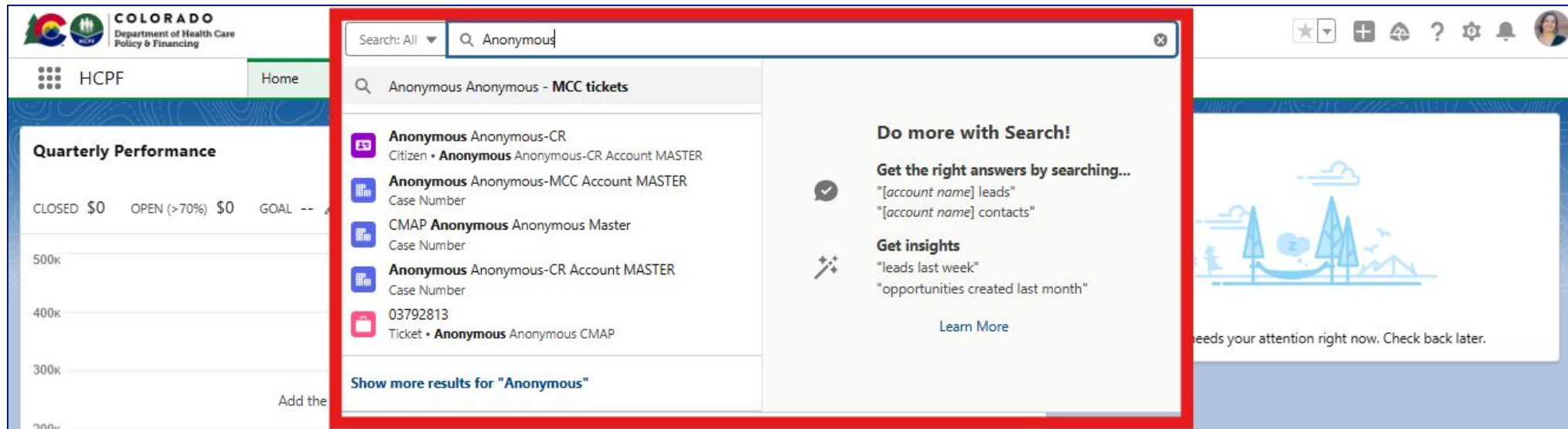
Salesforce Navigation

Salesforce Navigation

- In the Salesforce Navigation module, you reviewed how to navigate within Salesforce and how to utilize the following functions:
 - General Search Bar
 - Global Actions: CBMS Search
- We will briefly cover these functions together, as well as review some best practices in Salesforce!

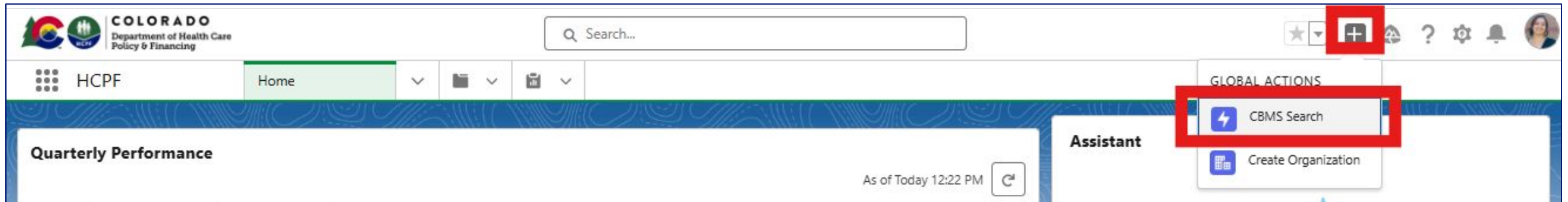
Salesforce Navigation

- General Search Bar
 - Scans the entire HCPF Salesforce instance for any reference of the search entered. Any available information can be entered into the General Search Bar: name, date of birth, email address, phone number, etc.



Salesforce Navigation

- Global Actions: CBMS Search
 - Allows users to do a quick CBMS search from the HCPF Salesforce instance. **PLEASE NOTE:** If you have CBMS access, it is strongly recommended to use that system to research for member eligibility information, CBMS case numbers, State IDs, etc.



Salesforce Navigation: Best Practices!

General Search Results

- When utilizing the General Search bar, you often have to wade through results for tickets outside of escalations. HCPF has a lot of teams that utilize the platform!
- A good tip when reviewing ticket results, look at the ticket record type.
 - Reminder: The ticket record type for escalations is “Escalation Ticket”.

Tickets

5+ Results • Sorted by Relevance ▾

View More

Ticket Nu... ▾	Date/Time Opened ▾	Subject ▾	Status ▾	Ticket Record Type ▾	Ticket... ▾	
03979410	8/6/2025 11:33 AM	Tier2	Closed	Escalation Ticket	ndani	▾
03792813	2/20/2025 12:32 PM	Anonymous Anonymous CMAP	Closed	Open - CMAP	jisas	▾
04013286	9/8/2025 9:19 AM	Fraud Referral	Closed	Open - County Relations	adele	▾
04026944	9/22/2025 8:14 AM		Pending Response from Submitter	Trust Unit Ticket	llock	▾
04042950	10/7/2025 3:37 PM	Anonymous	Closed	Open - PEAK Help Desk	kpavl	▾

CBMS Global Action Search Results

- You can “pull” or access the Case Details Page for a member’s case from the CBMS Search Global Action Button. Just click on the blue hyperlink on the Case # column!

Search CBMS

Search Type: State ID

Look up State ID

CASE #	STATUS	FIRST NAME	LAST NAME	DATE OF BIRTH	STATE ID	PROGRAM DETAILS										
[Redacted]	Closed	[Redacted]	[Redacted]	[Redacted]	[Redacted]	<table border="1"><thead><tr><th>PROGRAM</th><th>STATUS</th></tr></thead><tbody><tr><td>Medical Assistance</td><td>Discontinued</td></tr><tr><td>SNAP</td><td>Denied</td></tr></tbody></table>	PROGRAM	STATUS	Medical Assistance	Discontinued	SNAP	Denied				
PROGRAM	STATUS															
Medical Assistance	Discontinued															
SNAP	Denied															
[Redacted]	Closed	[Redacted]	[Redacted]	[Redacted]	[Redacted]	<table border="1"><thead><tr><th>PROGRAM</th><th>STATUS</th></tr></thead><tbody><tr><td>Medical Assistance</td><td>Discontinued</td></tr><tr><td>EXSNAP</td><td>Denied</td></tr><tr><td>Employment First</td><td>Denied</td></tr><tr><td>SNAP</td><td>Denied</td></tr></tbody></table>	PROGRAM	STATUS	Medical Assistance	Discontinued	EXSNAP	Denied	Employment First	Denied	SNAP	Denied
PROGRAM	STATUS															
Medical Assistance	Discontinued															
EXSNAP	Denied															
Employment First	Denied															
SNAP	Denied															
[Redacted]	Closed	[Redacted]	[Redacted]	[Redacted]	[Redacted]	<table border="1"><thead><tr><th>PROGRAM</th><th>STATUS</th></tr></thead><tbody><tr><td>Medical Assistance</td><td>Cancelled</td></tr><tr><td>Family Medical Assistance</td><td>Denied</td></tr><tr><td>Childrens Health Plan Plus</td><td>Denied</td></tr><tr><td>SNAP</td><td>Cancelled</td></tr></tbody></table>	PROGRAM	STATUS	Medical Assistance	Cancelled	Family Medical Assistance	Denied	Childrens Health Plan Plus	Denied	SNAP	Cancelled
PROGRAM	STATUS															
Medical Assistance	Cancelled															
Family Medical Assistance	Denied															
Childrens Health Plan Plus	Denied															
SNAP	Cancelled															

Okay

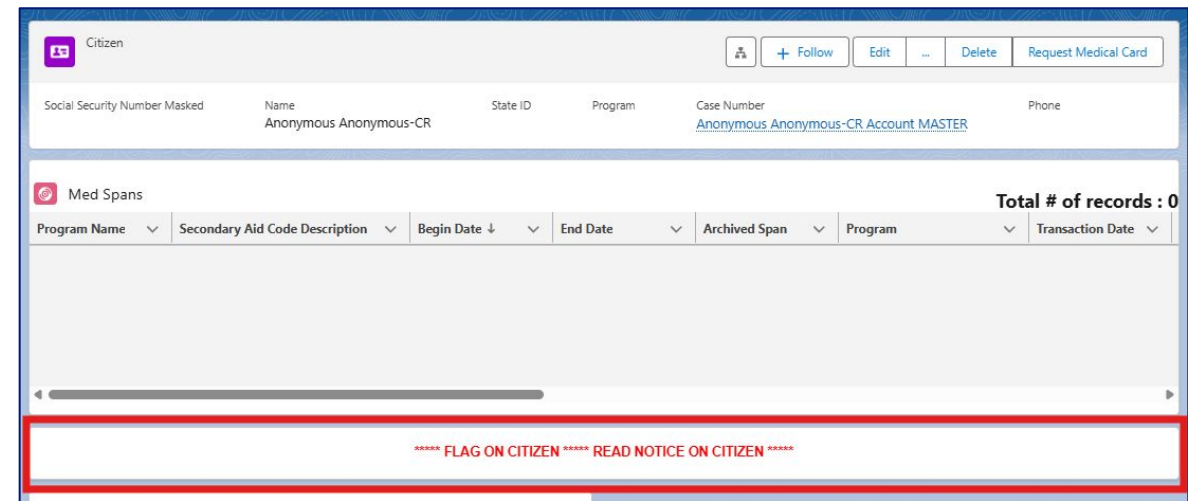
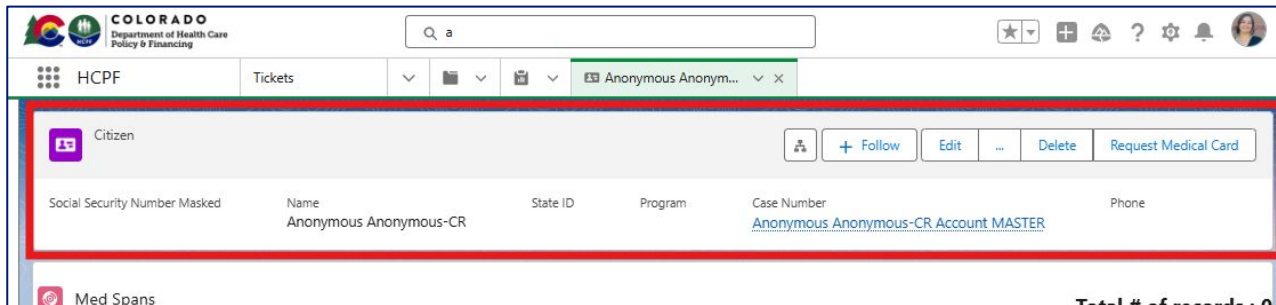
Citizen's Details Page

Citizen's Details Page

- In the Citizen's Details module, you reviewed the sections related to escalations from the Citizen's Details Page:
 - Citizen Header
 - Med Spans
 - Notice on Citizens (Special Indicators)
 - Demographics
 - Tickets
 - Third Party & Personal Representative Info
 - Address Information
 - Eligibility Information
- We will briefly cover these sections together, as well as review some best practices in Salesforce!

Citizen's Details Page

- Citizen Header
 - Top section of the Citizen's Details Page that which contains a quick summary of contact, as well as some internal functionalities.
- Notice on Citizens (Special Indicators)
 - Banner that alerts Salesforce users of any contacts that require specific attention or actions.



Citizen's Details Page

- Med Spans
 - Displays the period of medical eligibility for members, listing the program they are participating in, their certification period begin date, their certification period end date, etc.

 Med Spans							Total # of records : 32	
Program Name ▾	Secondary Aid Code Description ▾	Begin Date ↓ ▾	End Date ▾	Archived Span ▾	Program ▾	Transaction Date ▾		
HCBS	QMB	7/01/25			Medical Assistance	8/19/25		
HCBS	QMB	5/01/25	6/30/25		Medical Assistance	7/18/25		
HCBS	QMB	4/28/25	4/30/25		Medical Assistance	5/22/25		
NF/Hospital 300% Ins...	QMB	3/01/25	4/27/25		Medical Assistance	5/22/25		
NF/Hospital 300% Ins...	QMB	1/01/25	2/28/25		Medical Assistance	2/08/25		

Citizen's Details Page

- Demographics
 - Lists the most recent demographics for a member that was pulled from CBMS and some HCPF Salesforce instance specific fields.
- Tickets
 - Lists all related tickets for the contact.

***** FLAG ON CITIZEN ***** READ NOTICE ON CITIZEN *****

HOH ☐	Preferred Phone
State ID 	Preferred Email
Case Number Anonymous Anonymous-CR Account MASTER	Phone
Name Anonymous Anonymous-CR	Mobile
Social Security Number Masked	Email
Date of Birth 1/1/1901	CLIENT_ID
Gender 	
Notice on Citizen DO NOT ALTER NAME OR DELETE RECORD -- Anonymous Anonymous-CR Citizen Master	

Tickets (6+) [New](#)

04026842 Subje... Connect for Health ... Date/... 9/19/2025 4:05 PM Status: T1: Pending Initial R...	04026448 Subje... Your one-time passc... Date/... 9/19/2025 1:14 PM Status: Closed	04026403 Subje... [encrypt] Fwd: RENE... Date/... 9/19/2025 12:56 PM Status: T1: Pending Initial R...
04026172 Subje... You have received a... Date/... 9/19/2025 11:38 AM Status: T1: In Progress with ...	04025536 Subje... HCPF Tier1 Complai... Date/... 9/18/2025 3:40 PM Status: T1: Successfully Res...	04025316 Subje... Your one-time passc... Date/... 9/18/2025 2:18 PM Status: Closed

[View All](#)

Open Activities (0) [New Task](#) [New Event](#)

FLAG ON CITIZEN READ NOTICE ON CITIZEN

HOH ☐	Preferred Phone
State ID 	Preferred Email
Case Number Anonymous Anonymous-CR Account MASTER	Phone
Name Anonymous Anonymous-CR	Mobile
Social Security Number Masked	Email
Date of Birth 1/1/1901	CLIENT_ID
Gender 	
Notice on Citizen DO NOT ALTER NAME OR DELETE RECORD -- Anonymous Anonymous-CR Citizen Master	

Tickets (6+) [New](#)

04026842 Subje... Connect for Health ... Date/... 9/19/2025 4:05 PM Status: T1: Pending Initial R...	04026448 Subje... Your one-time passc... Date/... 9/19/2025 1:14 PM Status: Closed	04026403 Subje... [encrypt] Fwd: RENE... Date/... 9/19/2025 12:56 PM Status: T1: Pending Initial R...
04026172 Subje... You have received a... Date/... 9/19/2025 11:38 AM Status: T1: In Progress with ...	04025536 Subje... HCPF Tier1 Complai... Date/... 9/18/2025 3:40 PM Status: T1: Successfully Res...	04025316 Subje... Your one-time passc... Date/... 9/18/2025 2:18 PM Status: Closed

[View All](#)

Open Activities (0) [New Task](#) [New Event](#)

Citizen's Details Page

- Third Party & Personal Representative Info
 - Lists any Third Party & Personal Representatives that have been approved by the HCPF Privacy Team.

The screenshot displays the 'Citizen's Details Page' interface. It features three main sections: 'Demographic Info', 'Third Party & Personal Representative Info', and 'Activity History (6+)'. The 'Third Party & Personal Representative Info' section is highlighted with a red border. The 'Activity History' section contains a table of tasks.

Demographic Info

Member of Federally Recognized Tribe	Race Code
Tribal State	Tribal Name
Long Term Care Provider ID	Health Care Provider Name
	Long Term Care Provider Name
	Out of State Former Foster Care

Third Party & Personal Representative Info

Personal Representative	Third Party Rep
Personal Rep Form Receipt Date	3rd Party Form Receipt Date
Personal Rep Form Pending	3rd Party Form Pending
Personal Rep Form Effective Date	3rd Party Form Effective Date
Personal Rep Form Expiration Date	3rd Party Form Expiration Date

Activity History (6+)

Subject	Related To	Task	Due Date
Call 02/07/2025 02:47...	Anonymous Anonymou...	✓	2/7/2025
Call 02/07/2025 02:36...	Anonymous Anonymou...	✓	2/7/2025
Call 02/07/2025 02:02...	Anonymous Anonymou...	✓	2/7/2025
Call 10/25/2024 01:37...		✓	10/25/2024
Call 10/23/2024 12:00...	03665324	✓	10/23/2024
Call 10/21/2024 10:09...	Anonymous Anonymou...	✓	10/21/2024

Citizen's Details Page

- Address Information
 - Lists the most recent physical and mailing address for the member listed in CBMS.
- Eligibility Information
 - Lists the most recent eligibility summary for the member listed in CBMS.

Third Party & Personal Representative Info

Personal Representative	Third Party Rep
Personal Rep Form Receipt Date	3rd Party Form Receipt Date
Personal Rep Form Pending	3rd Party Form Pending
Personal Rep Form Effective Date	3rd Party Form Effective Date
Personal Rep Form Expiration Date	3rd Party Form Expiration Date

Address Information

Home Street	Mailing Street
Home City	Mailing City
Home County	Mailing County
Home State/Province	Mailing State/Province
Home Zip/Postal Code	Mailing Zip/Postal Code
Description	

Eligibility Information

Coverage Begin Date	Caseworker Name
Coverage End Date	Major Program
Transaction Date	Program group
SSI Eligibility	Eligibility Type
SSI Elig Date	User County
Coverage Status	Program Name
Reason	Grant Code
Comment Type	Effective Begin Date
Comment	Effective End Date
Expected Due Date	Waiver Type
Date of Death	

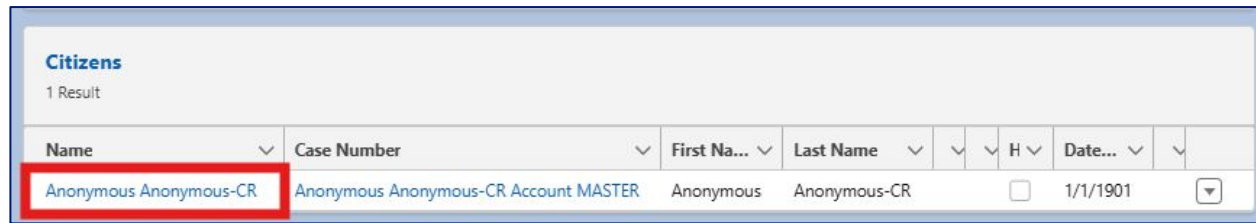
System Information

Contact Owner Jeanette Albert	Contact Record Type Personal Contact
Created By Jeanette Albert, 7/25/2023 11:29 AM	Last Modified By Raquel Jennings, 9/9/2025 12:24 PM

Citizen's Details Page: Best Practices!

Accessing the Citizen's Details Page

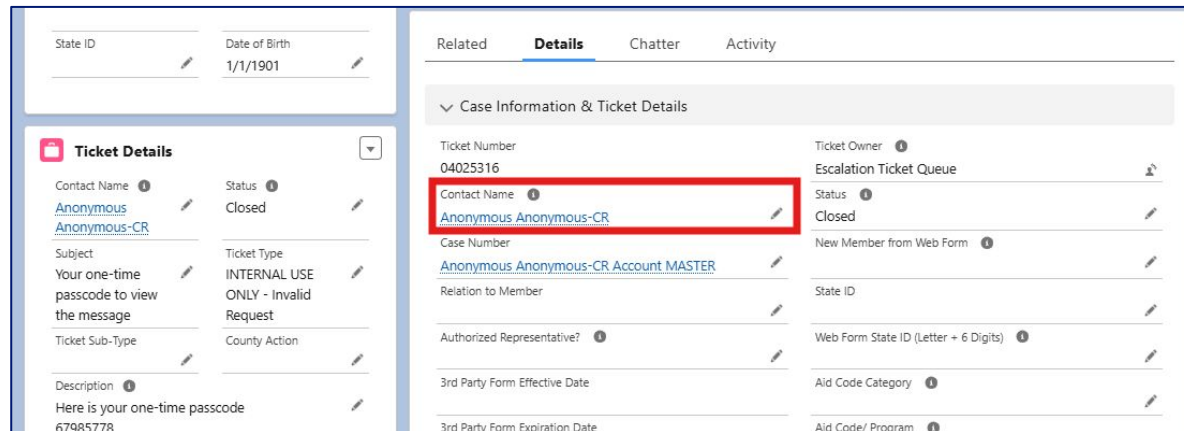
- When using the General Search Bar or reviewing a ticket, Salesforce users have the option to navigate to a Citizen's Details Page to by clicking on the contact's blue hyperlink.



Citizens
1 Result

Name	Case Number	First Na...	Last Name	H	Date...
Anonymous Anonymous-CR	Anonymous Anonymous-CR Account MASTER	Anonymous	Anonymous-CR	☐	1/1/1901

OR



State ID: [edit] Date of Birth: 1/1/1901 [edit]

Ticket Details

Contact Name	Status
Anonymous Anonymous-CR	Closed

Subject: Your one-time passcode to view the message
Ticket Type: INTERNAL USE ONLY - Invalid Request
Ticket Sub-Type: County Action

Description: Here is your one-time passcode 67985778

Case Information & Ticket Details

Ticket Number	Ticket Owner
04025316	Escalation Ticket Queue

Contact Name: [Anonymous Anonymous-CR](#) [edit]

Case Number: [Anonymous Anonymous-CR Account MASTER](#) [edit]

Relation to Member: [edit]

Authorized Representative?: [edit]

3rd Party Form Effective Date: [edit]

3rd Party Form Expiration Date: [edit]

Status: Closed [edit]

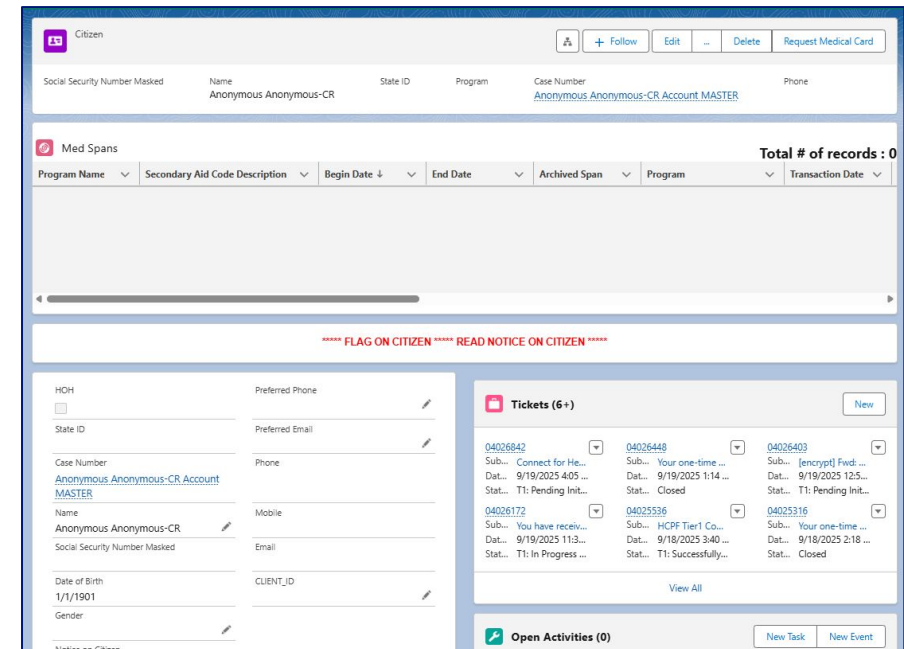
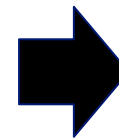
New Member from Web Form: [edit]

State ID: [edit]

Web Form State ID (Letter + 6 Digits): [edit]

Aid Code Category: [edit]

Aid Code/ Program: [edit]



Citizen

Follow Edit Delete Request Medical Card

Social Security Number Masked: [edit] Name: Anonymous Anonymous-CR State ID: [edit] Program: [edit] Case Number: Anonymous Anonymous-CR Account MASTER Phone: [edit]

Med Spans

Program Name	Secondary Aid Code Description	Begin Date	End Date	Archived Span	Program	Transaction Date
--------------	--------------------------------	------------	----------	---------------	---------	------------------

Total # of records: 0

***** FLAG ON CITIZEN ***** READ NOTICE ON CITIZEN *****

HOH

State ID: [edit] Case Number: [Anonymous Anonymous-CR Account MASTER](#) [edit]

Name: Anonymous Anonymous-CR [edit] Social Security Number Masked: [edit]

Date of Birth: 1/1/1901 [edit] Gender: [edit]

Preferred Phone: [edit] Preferred Email: [edit] Phone: [edit] Mobile: [edit] Email: [edit] CLIENT_ID: [edit]

Tickets (6+)

Case Number	Subject	Date	Status
04026842	Connect for He...	9/19/2025 405 ...	T1: Pending Init...
04026448	Your one-time ...	9/19/2025 1:14 ...	Closed
04026403	encrypt[Q] Fwd...	9/19/2025 12:5...	T1: Pending Init...
04026172	You have receiv...	9/19/2025 11:3...	T1: In Progress ...
04025536	HCPF Tier1 Co...	9/18/2025 3:40 ...	T1: Successfully...
04025316	Your one-time ...	9/18/2025 2:18 ...	Closed

View All

Open Activities (0)

New Task New Event

Case Details Page

Case Details Page

- In the Case Details Page module, you reviewed the important sections for escalations from the Case Details Page:
 - Case Header
 - Notice on Case (Special Indicators)
 - Demographics
 - Citizens
 - Tickets
 - Third Party & Personal Representative Info
 - Address Information
 - Eligibility Information
 - Additional Info & Comments
- We will briefly cover these sections together, as well as review some best practices in Salesforce!



Case Details Page

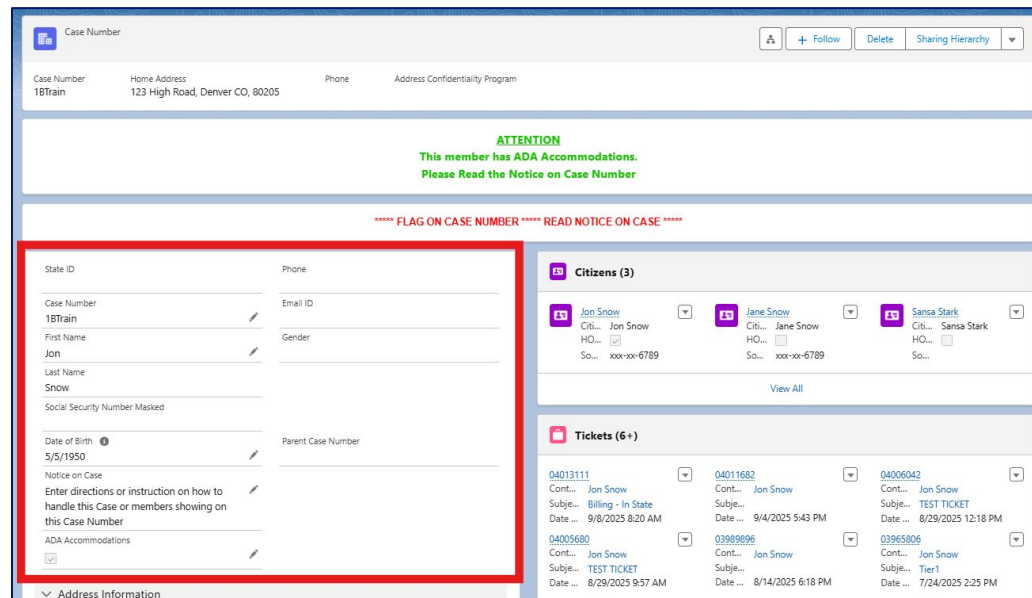
- Case Header
 - Top section of the Case Details Page that which contains a quick summary of case, as well as some internal functionalities.
- Notice on Case (Special Indicators)
 - Banner that alerts Salesforce users of any cases that require specific attention or actions.

The screenshot displays the Case Details Page for a case titled "Anonymous Anonymous-CR Account MASTER". The Case Header section, highlighted with a red border, includes fields for Case Number, Home Address, Phone, and Address Confidentiality Program, along with buttons for "+ Follow", "Change Owner", and "Change Record Type". Below the header, a red banner displays the text "***** FLAG ON CASE NUMBER ***** READ NOTICE ON CASE *****". The bottom section contains input fields for State ID, Case ID, Social Security Number Masked, Phone, Email ID, and Gender, as well as a "Citizens (1)" section with a "New" button.

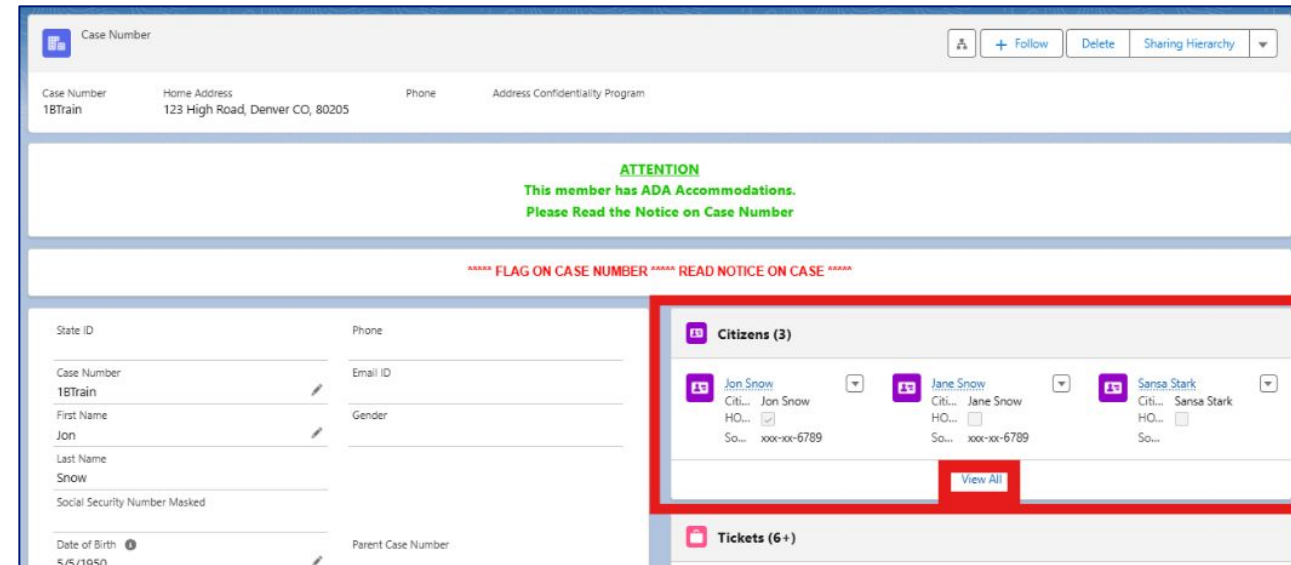
The screenshot displays the Case Details Page for a case titled "Anonymous Anonymous-CR Account MASTER". The Case Header section, highlighted with a red border, includes fields for Case Number, Home Address, Phone, and Address Confidentiality Program, along with buttons for "+ Follow", "Change Owner", and "Change Record Type". Below the header, a red banner displays the text "***** FLAG ON CASE NUMBER ***** READ NOTICE ON CASE *****". The bottom section contains input fields for State ID, Case ID, Social Security Number Masked, Phone, Email ID, and Gender, as well as a "Citizens (1)" section with a "New" button.

Case Details Page

- Demographics
 - Lists the most recent demographics for a member that was pulled from CBMS and some HCPF Salesforce instance specific fields.
- Citizens
 - Lists any household members on the case, active or inactive.



This screenshot shows the left side of the Case Details Page. The top section contains a header with the case number '18Train' and a home address '123 High Road, Denver CO, 80205'. Below this is a green attention banner stating 'This member has ADA Accommodations. Please Read the Notice on Case Number'. A red box highlights the 'State ID' section, which includes fields for Case Number, First Name, Last Name, Social Security Number Masked, Date of Birth, and Notice on Case. To the right of this section is a 'Citizens (3)' list showing three members: Jon Snow, Jane Snow, and Sansa Stark, each with a dropdown menu and a 'View All' link. Below the citizens list is a 'Tickets (6+)' section showing a list of tickets with columns for Case Number, Subject, and Date.



This screenshot shows the right side of the Case Details Page. It features the same header and attention banner as the left side. A red box highlights the 'Citizens (3)' list, which shows the same three members: Jon Snow, Jane Snow, and Sansa Stark. Below the citizens list is a 'Tickets (6+)' section. The 'View All' link under the citizens list is highlighted with a red box.

Case Details Page

- Tickets
 - Lists all related tickets for the case.
- Case Programs
 - Offers a quick summary of the HLPGs that the household is or previously enrolled in.

State ID

Case Number
18Train

First Name
Jon

Last Name
Snow

Social Security Number Masked

Date of Birth
5/5/1950

Notice on Case
Enter directions or instruction on how to handle this Case or members showing on this Case Number

ADA Accommodations
☒

Address Information

Home Street
123 High Road

Home City
Denver

Home County
Denver

Phone

Email ID

Gender

Parent Case Number

Citizens (3)

Jon Snow

Citi... Jon Snow

HO... ☒

So... xxx-xx-6789

Jane Snow

Citi... Jane Snow

HO... ☐

So... xxx-xx-6789

Sansa Stark

Citi... Sansa Stark

HO... ☐

So...

View All

Tickets (6+)

04013111

Cont... Jon Snow

Subje... Billing - In State

Date ... 9/8/2025 8:20 AM

04011682

Cont... Jon Snow

Subje...

Date ... 9/4/2025 5:43 PM

04006042

Cont... Jon Snow

Subje... TEST TICKET

Date ... 8/29/2025 12:18 PM

04005680

Cont... Jon Snow

Subje... TEST TICKET

Date ... 8/29/2025 9:57 AM

03989896

Cont... Jon Snow

Subje...

Date ... 8/14/2025 6:18 PM

03965806

Cont... Jon Snow

Subje... Tier1

Date ... 7/24/2025 2:25 PM

View All

Case Programs

Total # of records : 0

Case Program ↑

Program

Program Status

Count

Case Programs						Total # of records : 5
Case Program ↑	Program	Program Status	County Name	Office Name	Status Date	
SNAP	SNAP	Approved	LAS ANIMAS	Las Animas - Main	11/01/24	
Medical Assistance	Medical Assistance	Approved	LAS ANIMAS	Las Animas - Main	11/01/24	
Employment First	Employment First	Approved	LAS ANIMAS	Las Animas - Main	7/15/11	
EXSNAP	EXSNAP	Discontinued	LAS ANIMAS	Las Animas - Main	7/31/11	
Adult Financial	Adult Financial	Approved	LAS ANIMAS	Las Animas - Main	10/23/24	

Case Details Page

- Client Correspondence
 - Lists all correspondence generated/sent out from CBMS for the case.
- Address Information
 - Lists the most recent physical and mailing address for the case listed in CBMS.

 Client Correspondence Total # of records : 24

Prgm	Client Correspondence Type	Reason Description	Print Date
Medical Assistance	Forms	INITIAL FORM 1095B_EN	1/29/25
Medical Assistance	Speed Letter	INITIAL COVER_LTR 1095B	1/29/25
Medical Assistance	Notice Of Action	Failed to provide verification	2/01/25
Medical Assistance	Notice Of Action	Approved For Medical Assistance	2/14/25
Medical Assistance	Notice Of Action	Individual is rolling from lower benefit category to highe...	2/14/25

5/5/1950

Notice on Case

Enter directions or instruction on how to handle this Case or members showing on this Case Number

ADA Accommodations

☒

Address Information

Home Street	Mailing Street
123 High Road	123 High Road
Home City	Mailing City
Denver	Denver
Home County	Mailing County
Denver	Denver
Home State/Province	Mailing State/Province
CO	CO
Home Zip/Postal Code	Mailing Zip/Postal Code
80205	80205

Eligibility

Coverage Begin Date	Expected Due Date
Coverage End Date	Date of Death

04013111 Co... Jon Snow Su... Billing - In State Da... 9/8/2025 8:20 ...

04011682 Co... Jon Snow Su... 9/4/2025 5:43 ...

04006042 Co... Jon Snow Su... TEST TICKET Da... 8/29/2025 12:...

04005680 Co... Jon Snow Su... TEST TICKET Da... 8/29/2025 9:5...

03989896 Co... Jon Snow Su... 8/14/2025 6:1...

03965806 Co... Jon Snow Su... Tier1 Da... 7/24/2025 2:2...

[View All](#)

Case Programs Total # of records : 0

Case Program	Program	Program
--------------	---------	---------

Client Correspondence Total # of records : 0

Case Details Page

- Eligibility Information
 - List the most recent eligibility summary for the case listed in CBMS.

The screenshot displays the 'Case Details Page' interface. At the top, there are two input fields for 'Home Zip/Postal Code' and 'Mailing Zip/Postal Code', both containing the value '80205'. Below these, the 'Eligibility' section is highlighted with a red border. This section contains several input fields arranged in two columns: 'Coverage Begin Date', 'Expected Due Date', 'Coverage End Date', 'Date of Death', 'Span Transaction Date', 'Waiver Type', 'SSI Eligibility', 'Eligibility Type', 'SSI Elig Date', 'Program Name', 'Case Status', 'Grant Code', 'Comment Type', 'Waiver Effective Begin Date', and 'Waiver Effective End Date'. To the right of the 'Eligibility' section, there is a 'Client Correspondence' section with a 'Total # of records : 0' and a table with columns 'Prgm', 'Client Correspondence Type', and 'Reason Description'. Below this is an 'Open Activities (2)' section with 'New Task' and 'New Event' buttons, and a table with columns 'Subject', 'Name', 'Related To', and 'Task'.

Case Details Page

- Additional Info
 - Section for any additional notes or descriptions.
- Comments
 - Comment log that is pulled from the Case Comments in CBMS.

Span Transaction Date: _____ Waiver Type: _____

SSI Eligibility: Y Eligibility Type: _____

SSI Elig Date: 3/1/2025 Program Name: OAP Med-A

Case Status: Open Grant Code: _____

Comment Type: _____

Waiver Effective Begin Date: _____ Waiver Effective End Date: _____

▼ Additional Information

Notes	Description

▼ Comments

Comment: 09/05/2025 [REDACTED]

RRR

Interview letter generated for 09/12/2025 10 AM. LT PH 09/05/2025

09/05/2025 [REDACTED]

General

AF

09/05/2025 [REDACTED]

General

Client Correspondence

Total # of records : 24

Prgrm	Client Correspondence Type	Reason Description
Medical Assistance	Forms	INITIAL FORM 1095B_EN
Medical Assistance	Speed Letter	INITIAL COVER_LTR 1095B
Medical Assistance	Notice Of Action	Failed to provide verification
Medical Assistance	Notice Of Action	Approved For Medical Assistance
Medical Assistance	Notice Of Action	Individual is rolling from lower benefit cat

Open Activities (0) [New Task](#) [New Event](#)

Activity History (6) [Email](#) [View All](#)

Subject	Name	Related To	Task
Call 09/09/2025 08:...	[REDACTED]	[REDACTED]	✓
Email: Encrypt HCPF...	[REDACTED]	[REDACTED]	✓
Email: Encrypt HCPF...	[REDACTED]	[REDACTED]	✓
Email: Ticket 03769...	[REDACTED]	[REDACTED]	✓
Email: Encrypt HCPF...	[REDACTED]	[REDACTED]	✓
Email: Encrypt Re: H...	[REDACTED]	[REDACTED]	✓

View All

Chat Transcripts (0)

Case Details Page: Best Practices!

Accessing the Case Details Page

- When using the General Search Bar or reviewing a ticket, Salesforce users have the option to navigate to a Case Details Page to by clicking on the case's blue hyperlink.

Case Numbers
2 Results • Sorted by Relevance ▾

Case Number	C..	P..	C..	Case ...	Created Date	Last Modified Date	
Anonymous Anonymous-CR Account MASTER				jalbe	5/23/2023 9:39 AM	10/28/2024 9:03 AM	▾
Citizen Advocate Anonymous Anonymous Master				jalbe	11/14/2022 9:28 AM	11/14/2022 9:30 AM	▾

OR

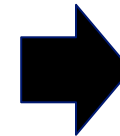
Ticket Details

Contact Name: Anonymous Anonymous-CR
Status: Closed
Subject: Your one-time passcode to view the message
Ticket Sub-Type: INTERNAL USE ONLY - Invalid Request
Description: Here is your one-time passcode 05442501

Case Information & Ticket Details

Ticket Number: 04026448
Contact Name: Anonymous Anonymous-CR
Case Number: **Anonymous Anonymous-CR Account MASTER**
Relation to Member: [blank]
Authorized Representative? [blank]
3rd Party Form Effective Date: [blank]
3rd Party Form Expiration Date: [blank]

Ticket Owner: Escalation Ticket Queue
Status: Closed
New Member from Web Form: [blank]
State ID: [blank]
Web Form State ID (Letter + 6 Digits): [blank]
Aid Code Category: [blank]
Aid Code/ Program: [blank]



Case Number

Case Number: Anonymous Anonymous-CR Account MASTER
Home Address: [blank] Phone: [blank] Address Confidentiality Program: [blank]

***** FLAG ON CASE NUMBER ***** READ NOTICE ON CASE *****

State ID: [blank] Phone: [blank]
Case ID: [blank] Email ID: [blank]
Social Security Number Masked: [blank] Gender: [blank]
Parent Case Number: [blank] Payee: [blank]
First Name: Anonymous
Last Name: Anonymous - CR
Case Number: Anonymous Anonymous-CR Account MASTER
Date of Birth: 1/1/1900
Notice on Case: DO NOT ALTER NAME OR DELETE RECORD -- Anonymous Anonymous-CR Case Number MASTER
Third Party Rep: [blank]
Personal Representative: [blank]

Citizens (1)
Anonymous An...
View All

Tickets (6+)
04026448: Anonymous An... Sub... Your one-time p... Prio... Medium
04026172: Anonymous An... Sub... You have receiv... Prio... Medium
04025316: Anonymous An... Sub... Your one-time p... Prio... Medium
04025003: Anonymous An... Sub... Weld has submi... Prio... Medium
04024412: Anonymous An... Sub... Your one-time p... Prio... Medium
04023356: Anonymous An... Sub... Can someone pl... Prio... Medium
View All

Open Activities (0)
New Task New Event



Q & A

Playlist to Complete Before Part 2

Before Next Meeting, Complete

- Part 2 Module - Reporting/Dashboard/Data
 - Escalations: Dashboard Navigation
 - Escalations: Dashboard Widget Review
 - Escalations: Exporting Reports
 - Escalations: Tier 1 Review
 - Escalations: County/CMA Ticket Resolution
 - Escalations: Ticket Reassignment
- Review & download all resources included in this section!

Next Meeting

Wednesday, Oct. 22,
2025
10:30am-12:00pm



Questions?

Need Help?

HCPF_PCA_Strategy@state.co.us

Submit a County Relations Webform, [click here!](#)