HCPF Escalations

Partner Integration - Cohort #1

Part 2 Meeting
10/22/2025

Reminder

Please get us any acronym list that you operate from by Friday, October 24, 2025 so we can compile them together and share at the final cohort 1 meeting.

Send to HCPF_PCA_Strategy@state.co.us

Thank you!!

What Should Be Completed in Bright

- Part 2 Module - Navigation
  - Dashboard Navigation
  - Dashboard Widget Review
  - Exporting Reports
  - Tier 1 Review
  - County/CMA Ticket Resolution
  - Ticket Reassignment
- Review & download all resources included in this section!
- REMINDER: All trainings must be completed by 10/30/25 to get access to Salesforce!
  - For those impacted by the Bright outage, all Cohort #1 users will have access until EOD Monday, November 3rd.

Escalations: Dashboard Navigation

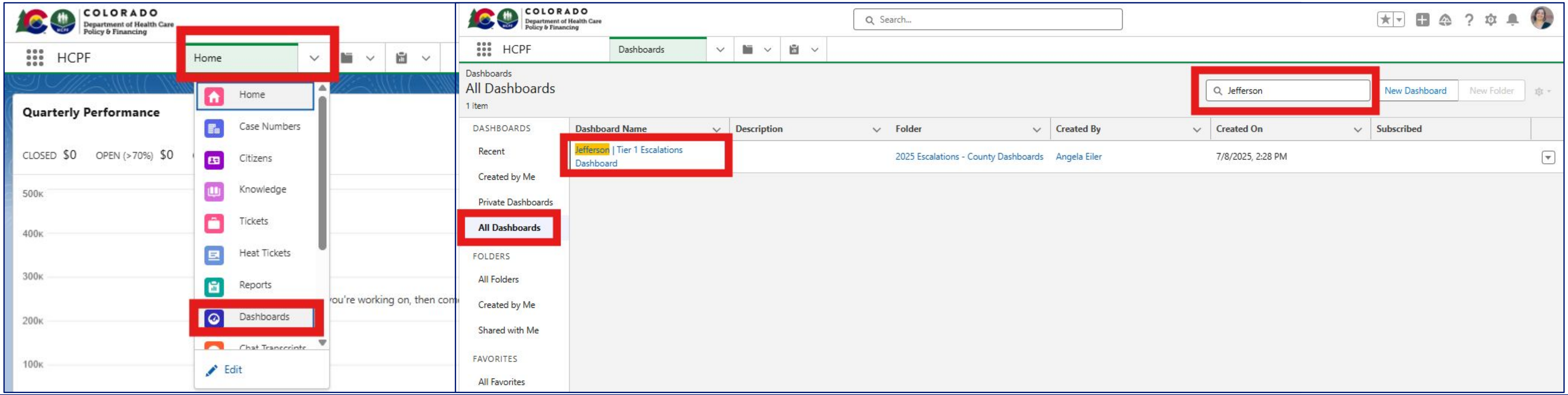
Escalations: Dashboard Navigation

- In the Escalations: Dashboard Navigation module, you reviewed how to access your site's escalations dashboard.
- We will briefly cover this module together, as well as review some best practices in Salesforce!

Accessing the Dashboard

Each County/CMA user will be able to review their ticket assignment and their site's escalations data by accessing their site's escalations dashboard using the following steps:

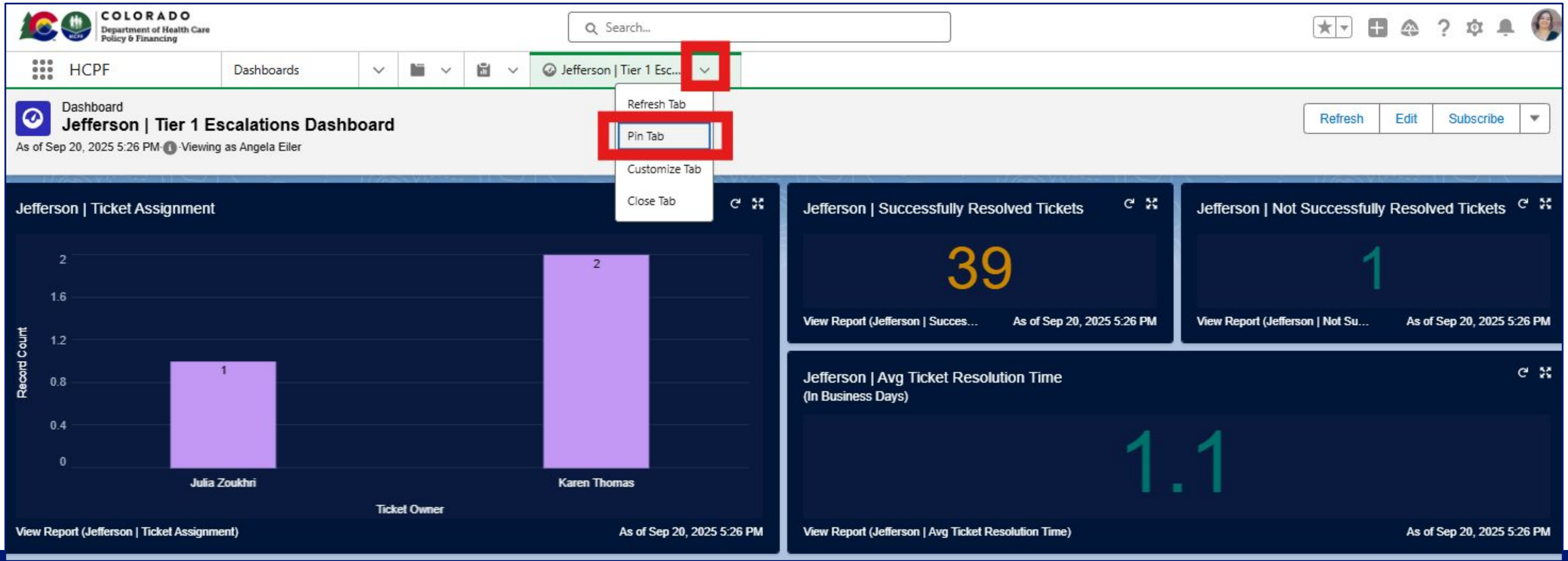
1. Logging to Salesforce
2. Going to the **Navigation Menu** towards the top of the screen and select **Dashboards**
3. Searching for their site's name in Dashboards menu



Dashboard Navigation: Best Practices!

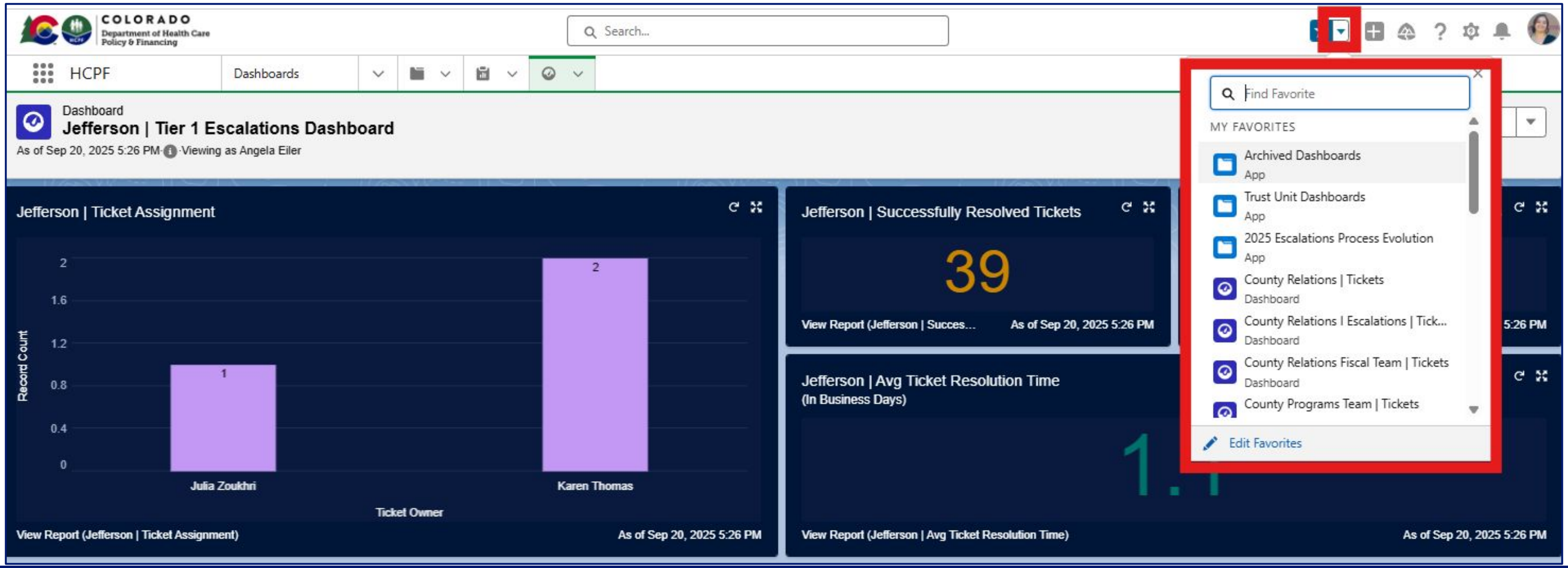
Pinning the Dashboard

- Salesforce users have the option to “pin” dashboards, reports, tickets, contacts, etc. to their toolbar, so they can quickly navigate back to it whenever they’d like.
- It is recommended to pin your site’s dashboard at first login.



Adding the Dashboard to Favorites

- Salesforce users also have the option to add a dashboard, report, ticket, contact, etc. to their favorites, so they can quickly navigate back to it whenever they'd like.
- This is a good substitute to pinning a dashboard to your toolbar, if you often tend to have a lot of tabs open at one time.



Refresh Dashboard at Every Login!

- Salesforce unfortunately does not refresh dashboards automatically
- At each login, it is recommended to click the Refresh button on the top right corner of the dashboard to bring up the most recent info
- You can only refresh once a minute.

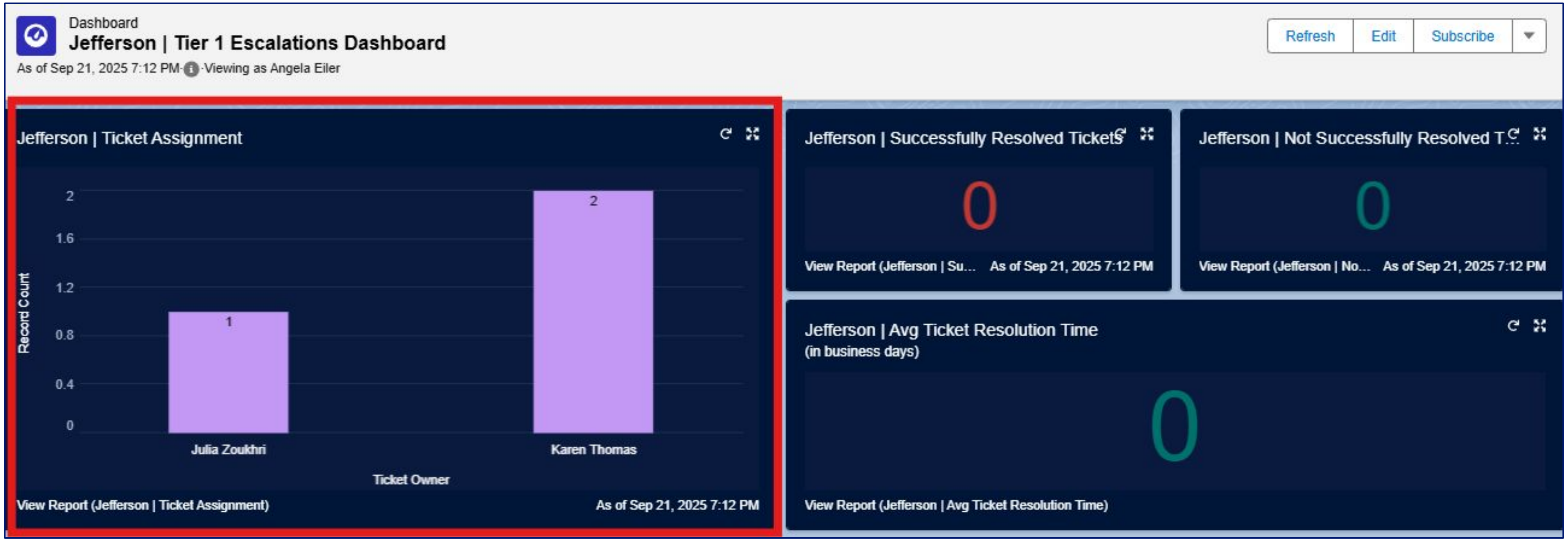
Escalations: Dashboard Widget Review

Dashboard Widget Review

- In the Escalations: Dashboard Widget Review module, you reviewed all the reports/widgets that are available on each county/CMA escalations dashboard:
  - Ticket Assignment
  - Ticket Status
  - Successfully Resolved Tickets
  - Not Successfully Resolved Tickets
  - Average Ticket Resolution Time
  - County/CMA Subject Areas
  - Upcoming Resolution Due Date
  - Tickets per User
- We will briefly cover these widgets together, as well as review some best practices in Salesforce!

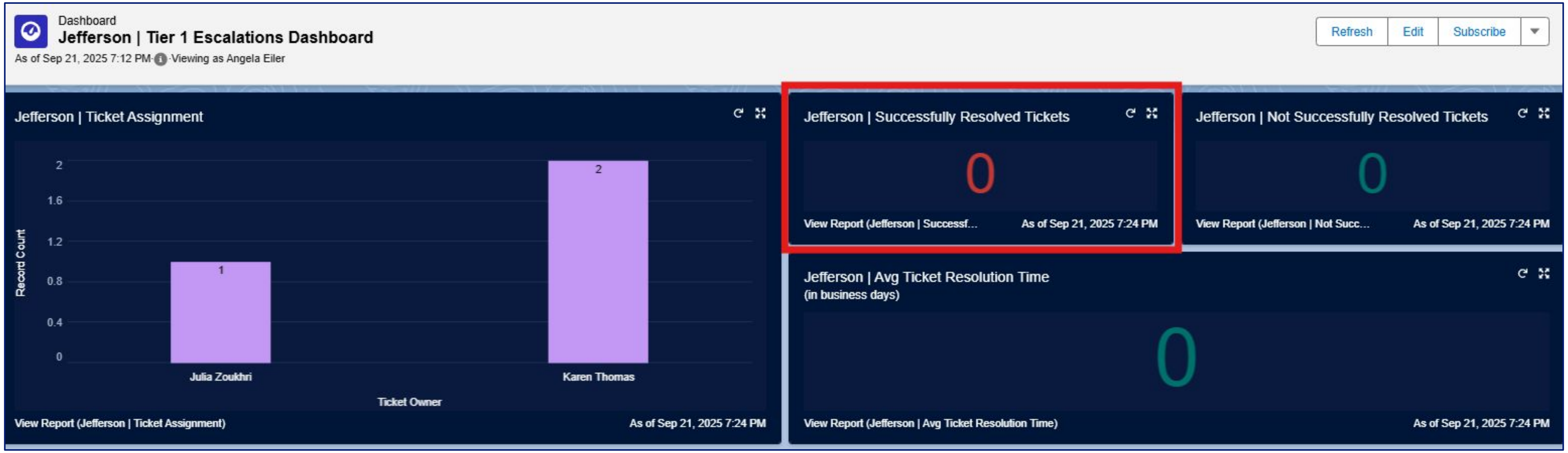
Ticket Assignment

- This widget's report will list open tickets by Ticket Owner.
- This will be the widget that County/CMA users will access to get to their open ticket assignments.



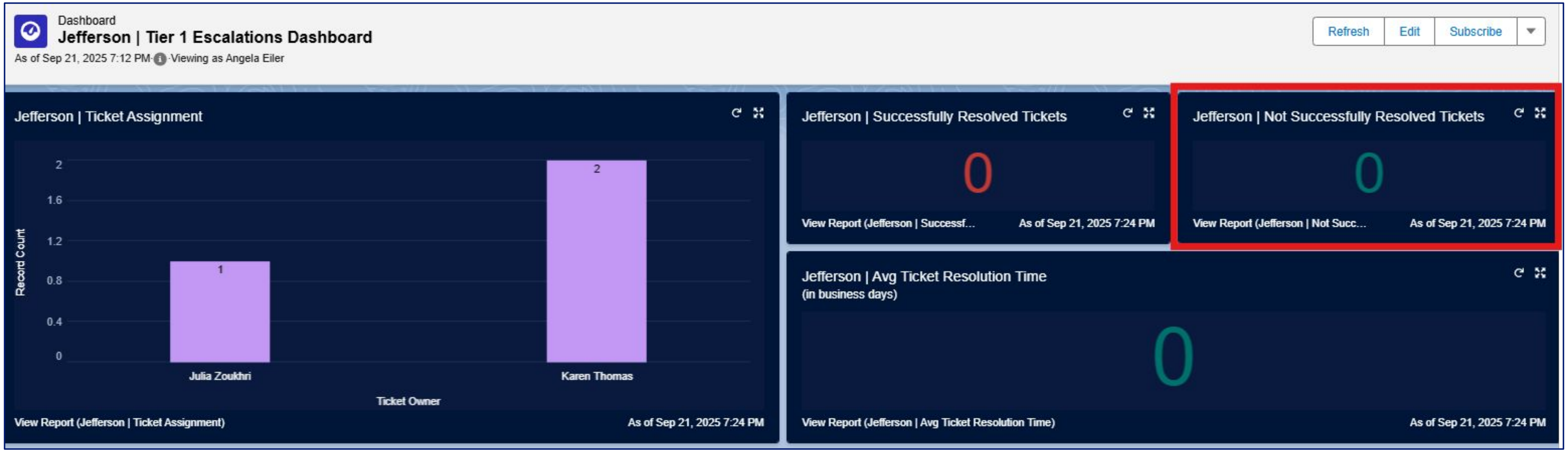
Successfully Resolved Tickets

- This widget's report will track the number of tickets for the site where the status was updated to "T1: Successfully Resolved".



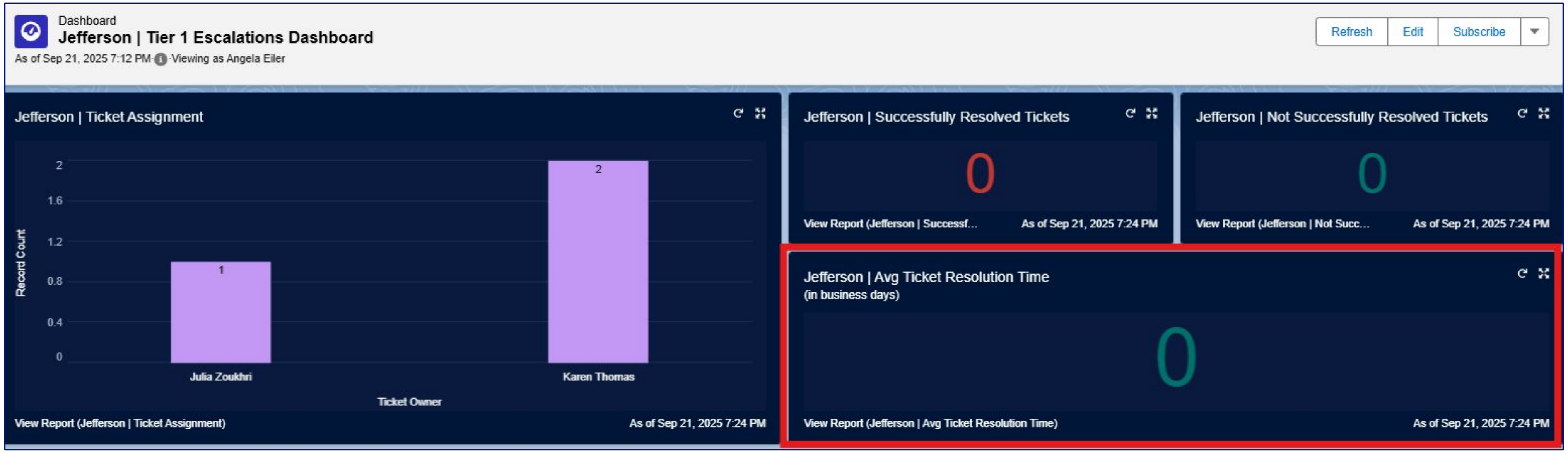
Not Successfully Resolved Tickets

- This widget's report will track the number of tickets for the site where the status was updated to "T1: Not Successfully Resolved".



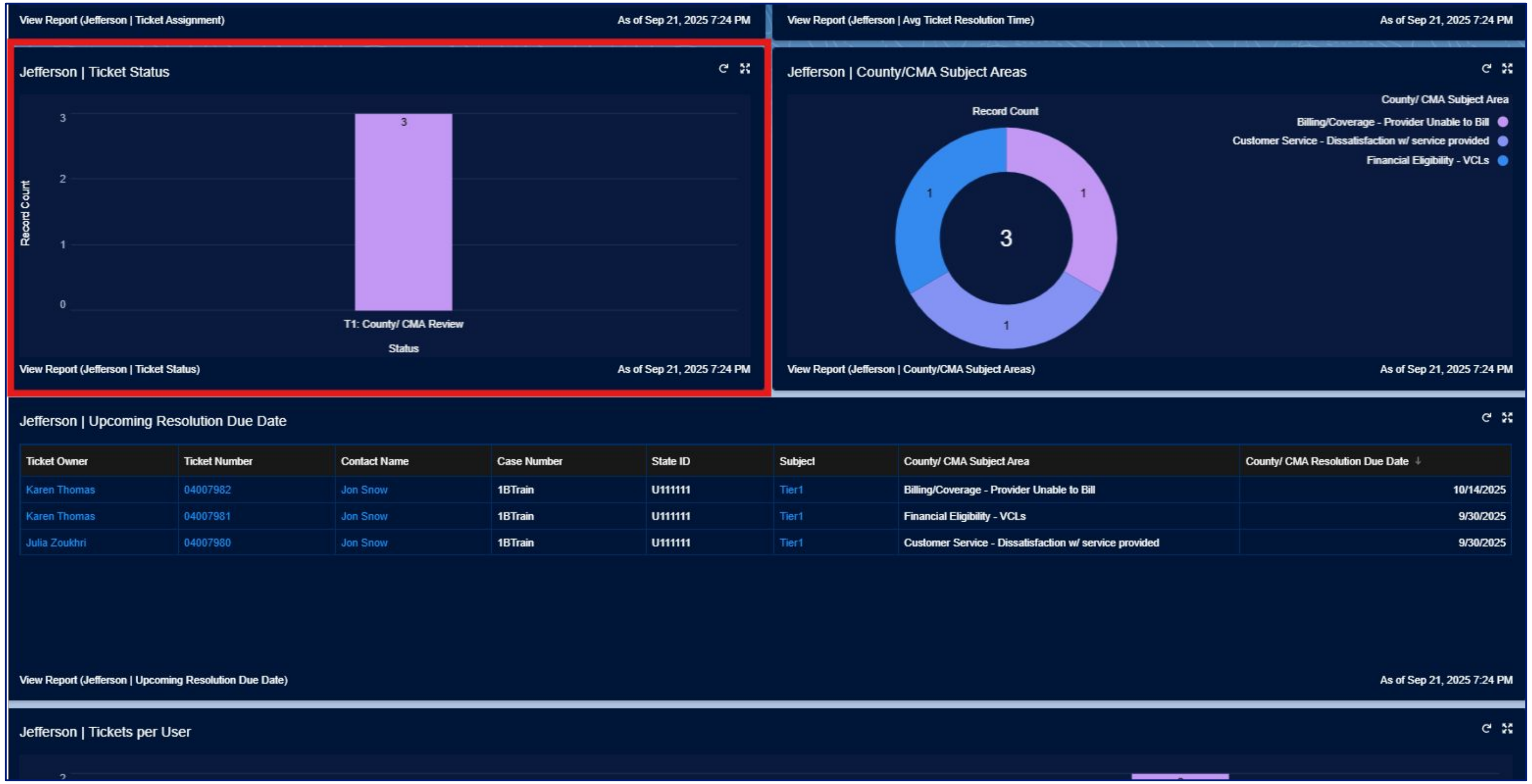
Average Ticket Resolution Time

- This widget's report will track the number of business days it takes each County/CMA user for the site to resolve a ticket and average it for the site.
  - Sites are not penalized for any time the ticket is in the Ticket Assigner, internal Tier 1, or Tier 2 stage. Salesforce will only calculate the time the ticket is in "County/CMA Review".



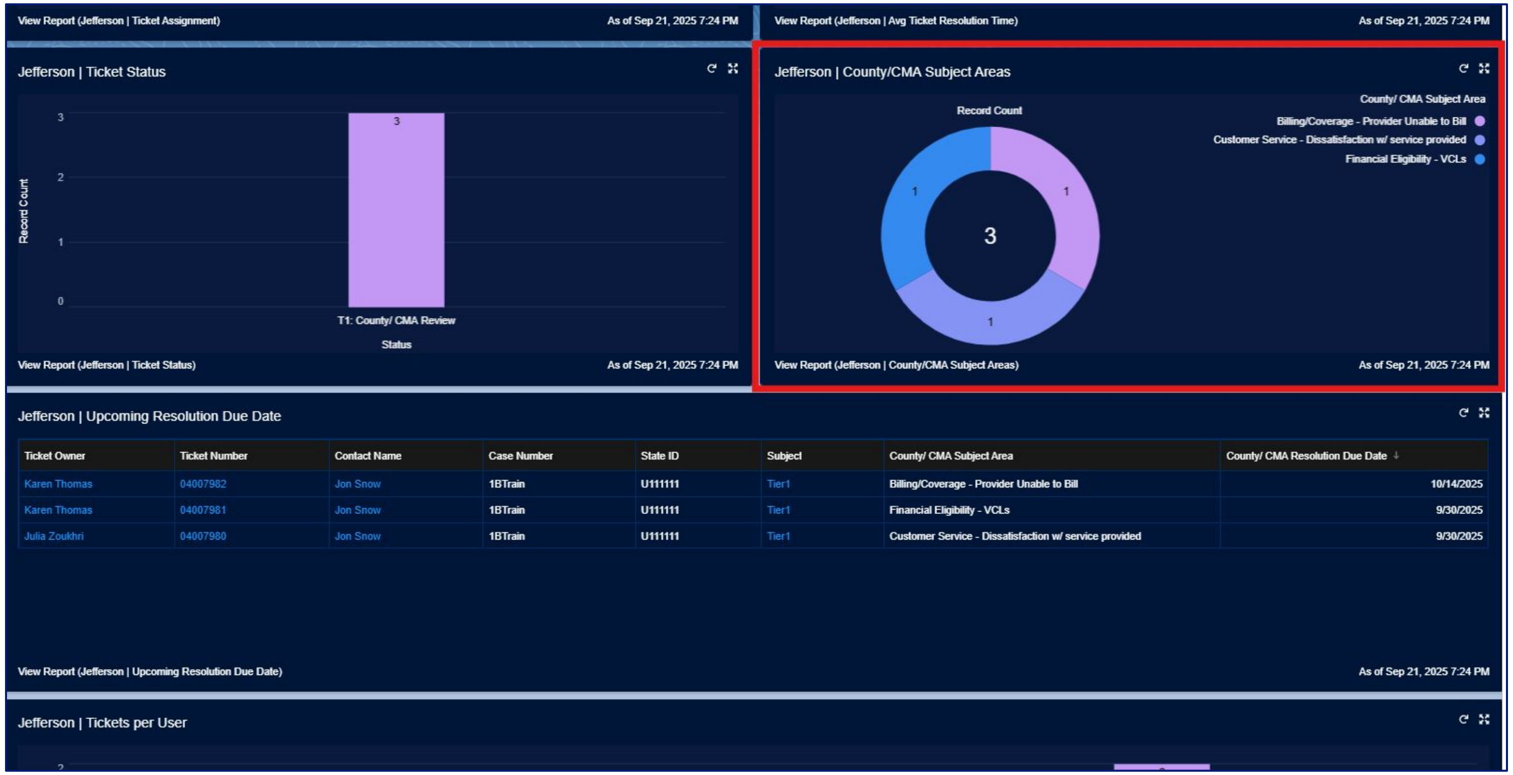
Ticket Status

- This widget's report will list open tickets by Status.



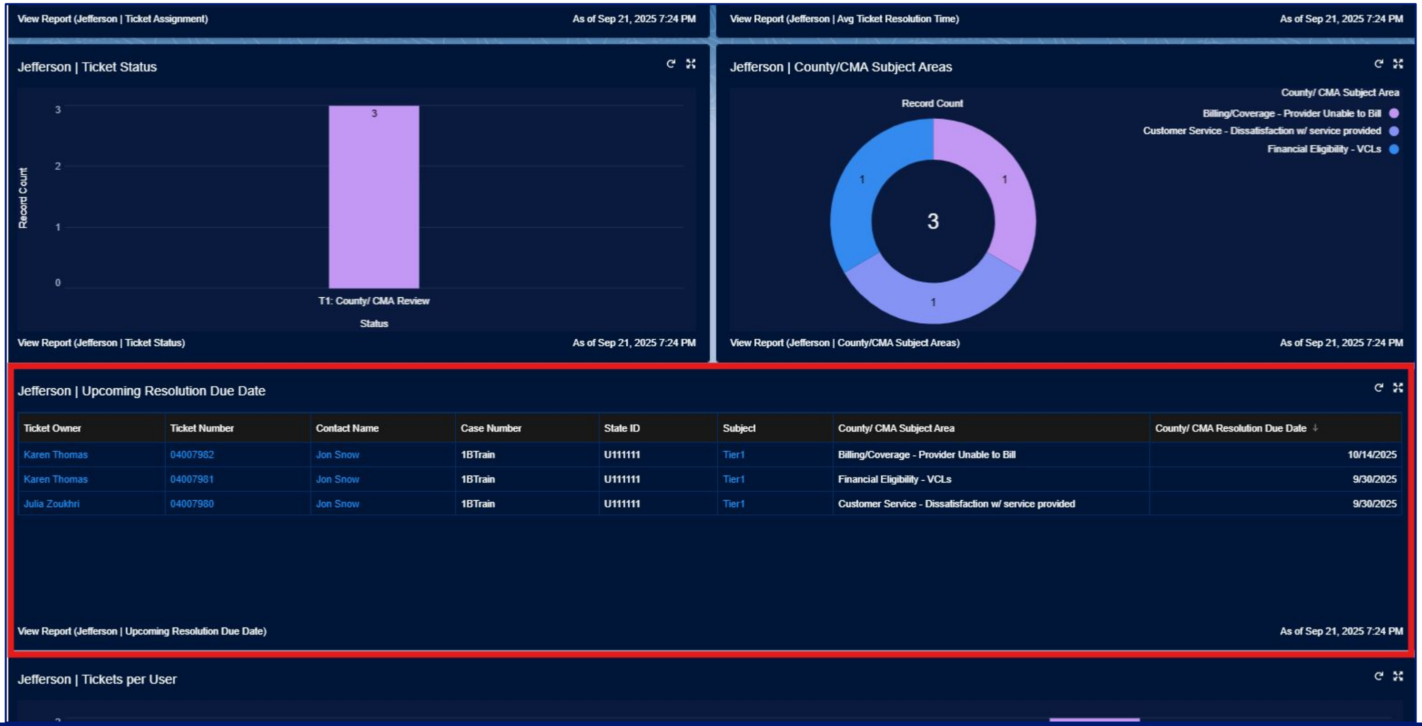
County/CMA Subject Areas

- This widget's report track the County/CMA Subject Area for each ticket.



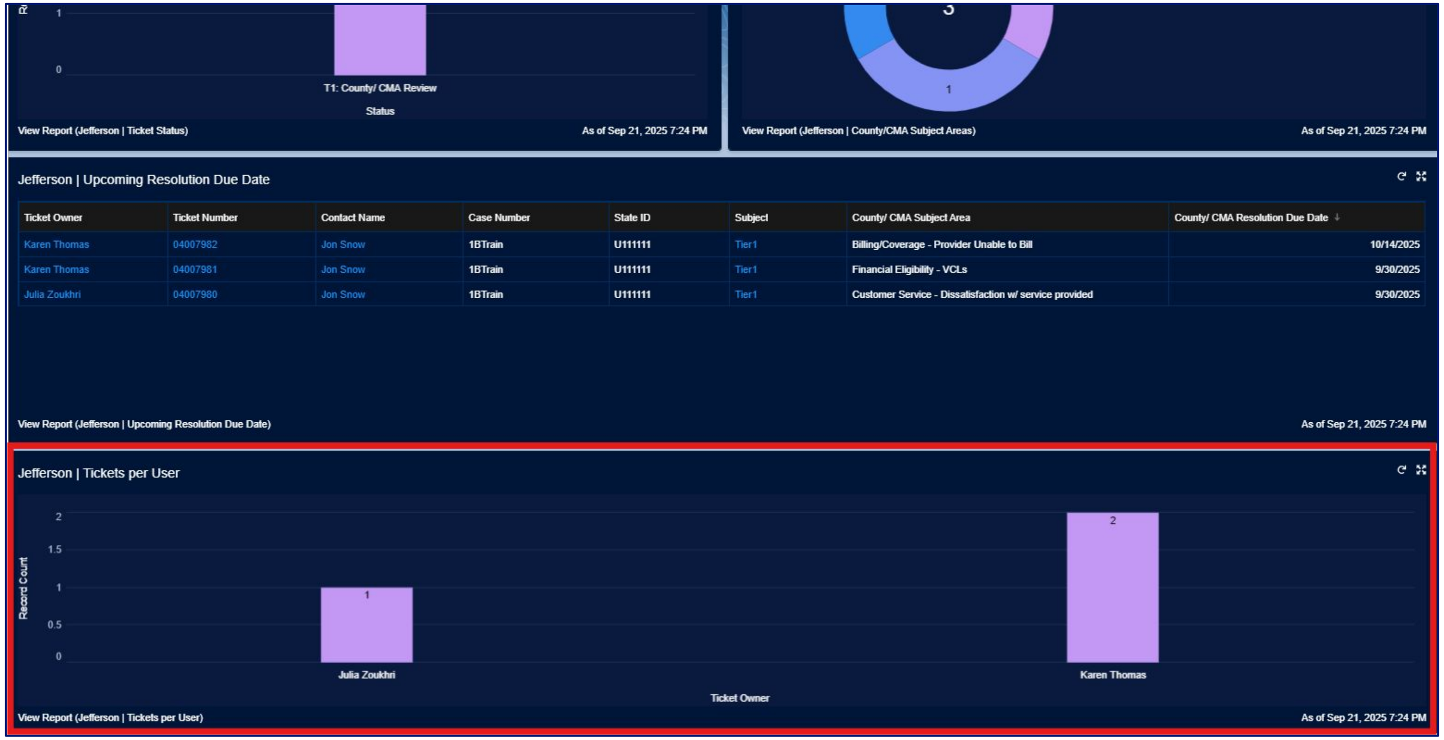
Upcoming Resolution Due Date

- This widget's report will list all open tickets for the site, with the County/CMA Resolution Due Dates in ascending order.



Tickets per User

- This widget's report will list all tickets by Ticket Owner, both open and resolved/closed.



Dashboard Widget Review: Best Practices!

Operational vs Informational

- Dashboards are great tools for teams to quickly access tickets and review team data.
- You can access tickets from each dashboard widget; however, most widgets are meant to be informational and not operational.
- Operational Widgets:
  - Ticket Assignment
  - Upcoming Resolution Due Date
- Informational:
  - Successfully/Not Successfully Resolved Tickets
  - Average Ticket Resolution Time
  - Ticket Status
  - County/CMA Subject Areas
  - Tickets per User

Representative Ticket Data

- To ensure that ticket data is representative, users must ensure they are completing ticket fields and following their escalations process correctly.
- Example: The Successfully/Not Successfully Resolved Ticket Widgets
  - If a user accidentally uses the incorrect resolution status on their ticket, these widgets will not count correctly.
  - Salesforce will also not automatically exclude tickets from these reports that were updated to “T1:Successfully/T1: Not Successfully Resolved” incorrectly.
  - Exceptions have to be entered manually by the Strategy Team, so following workflow correctly is very important for representative data collection.

Escalations: Exporting Reports

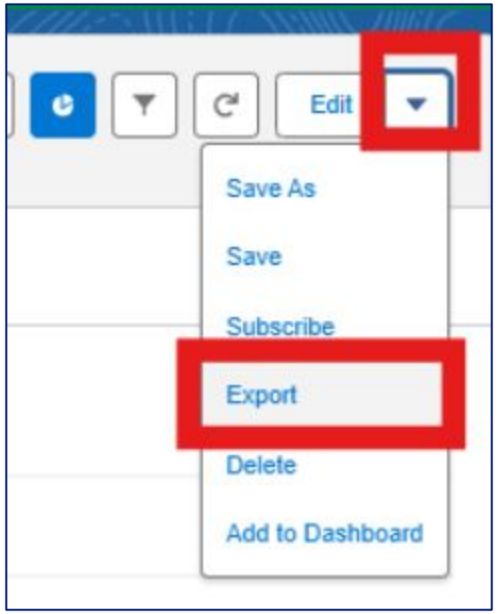
Exporting Reports

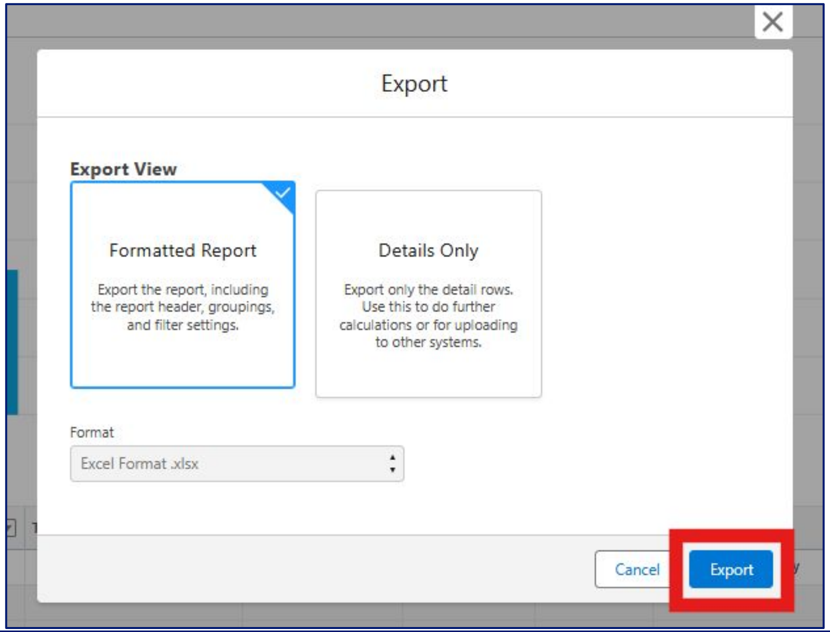
- In the Escalations: Exporting Reports module, you reviewed how to export reports and charts from your site's escalations dashboard to help triage escalations, report out on escalations data within your organization, etc. You reviewed the following topics:
  - Exporting Reports
  - Exporting Report Charts
  - Exporting Dashboards
- We will briefly cover these topics together, as well as review some best practices in Salesforce!

Exporting Reports

County/CMA users have the option to export reports from the widgets from their site's escalations dashboard by doing the following:

1. Access the report you want to export by selecting the **View Report** link on the bottom of the widget.
2. Select **Export** in the dropdown next to the Edit button on the top right side of the screen.
3. Export a Formatted Report in an Excel file.

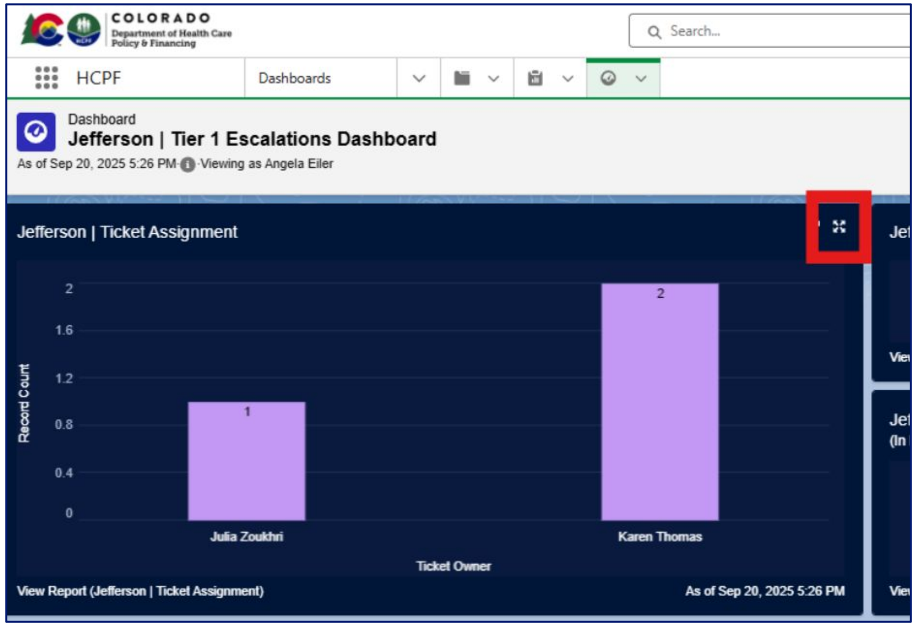




Exporting Report Charts

County/CMA users have the option to export report charts from the widgets from their site's escalations dashboard by doing the following:

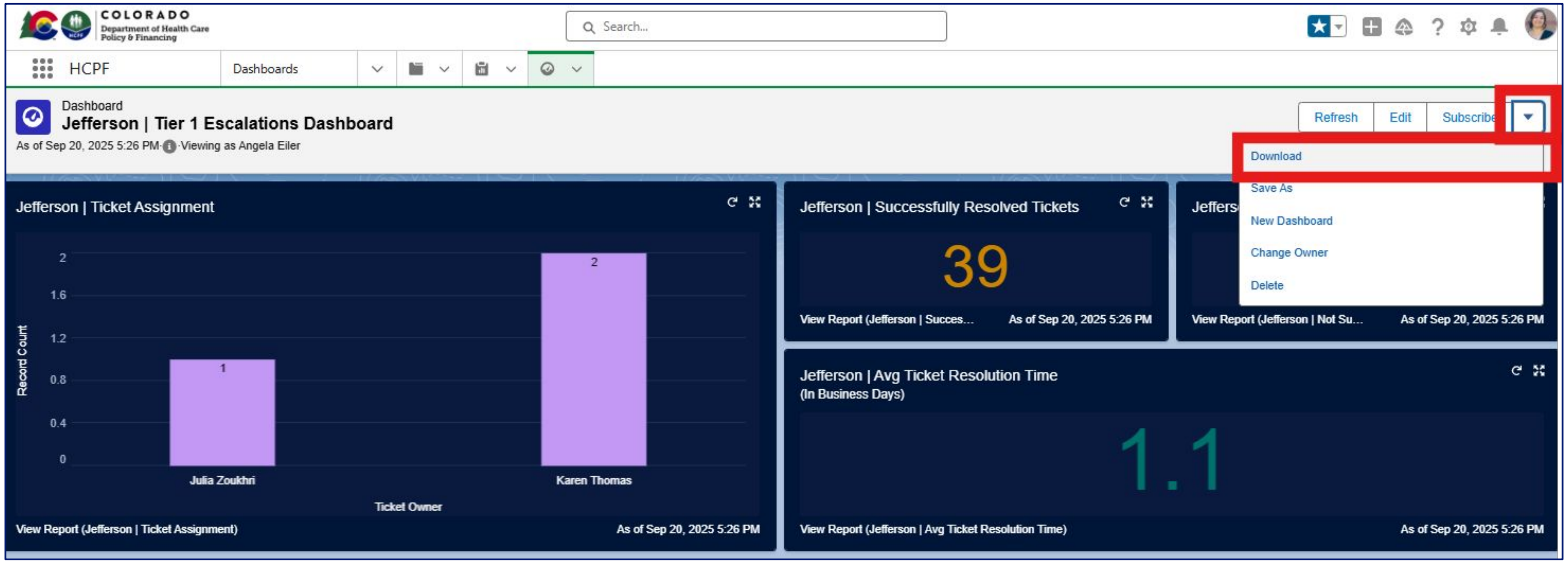
1. Access the report chart you want to export by selecting the expanding arrows icon on the top of the widget.
2. Select the download icon on the top right of the window to export the chart as a PNG file.



Exporting Dashboards

County/CMA users have the option to export a screenshot from their site's escalations dashboard by doing the following:

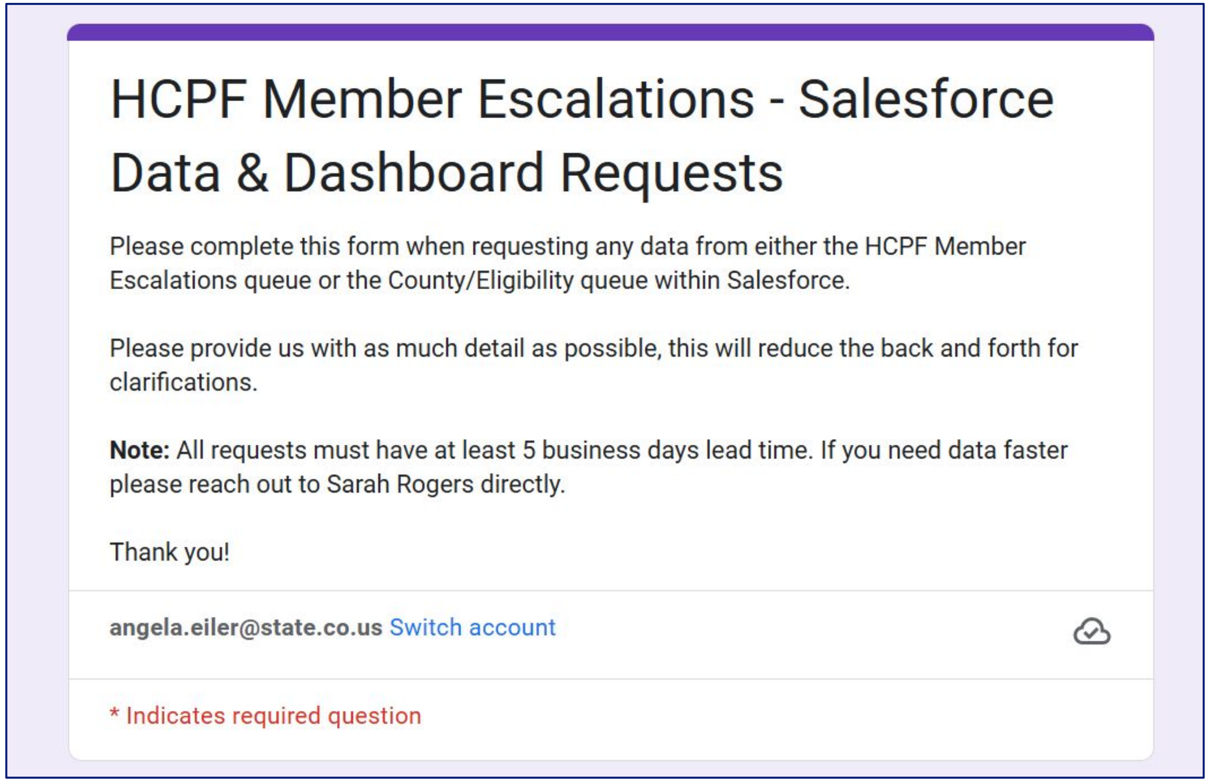
1. Select **Download** in the dropdown icon at the top right to export the dashboard as a PNG file.



Exporting Reports: Best Practices!

Escalations Report Requests

- Users can request additional escalations reports from the PCA Strategy Team via our Google Form!



HCPF Member Escalations - Salesforce Data & Dashboard Requests

Please complete this form when requesting any data from either the HCPF Member Escalations queue or the County/Eligibility queue within Salesforce.

Please provide us with as much detail as possible, this will reduce the back and forth for clarifications.

Note: All requests must have at least 5 business days lead time. If you need data faster please reach out to Sarah Rogers directly.

Thank you!

angela.eiler@state.co.us Switch account

* Indicates required question

Escalations: Tier 1 Review

Tier 1 Review

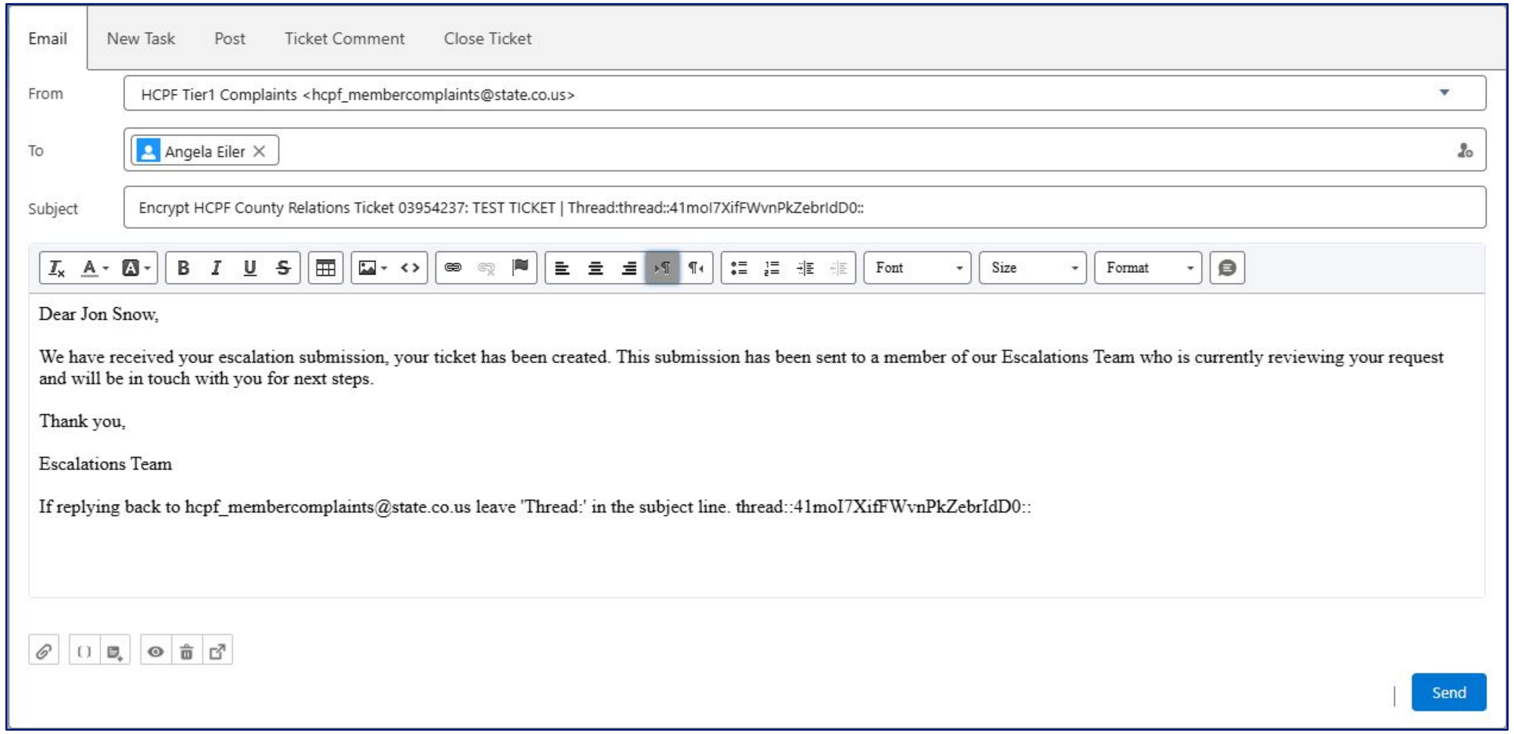
- In the Escalations: Tier 1 Module module, you reviewed the different steps an internal Tier 1 user takes when reviewing a ticket for resolution or transfer:
  - Review Ticket Information and Tabs
  - Initial Member-Centered Contact
  - Resolution
  - Reassignment
- We will briefly cover these steps together!

Review Ticket Information and Tabs

- After an Escalation Ticket is assigned to a Tier 1 user, they will first review the information in the following sections:
  - Case Information & Ticket Details Section
  - Webform Submission Details
  - Description
  - Tier 1 (HCPF Specialists, Counties, & CMAs) Section
  - Chatter Tab
  - Related Tab

Initial Member-Centered Contact

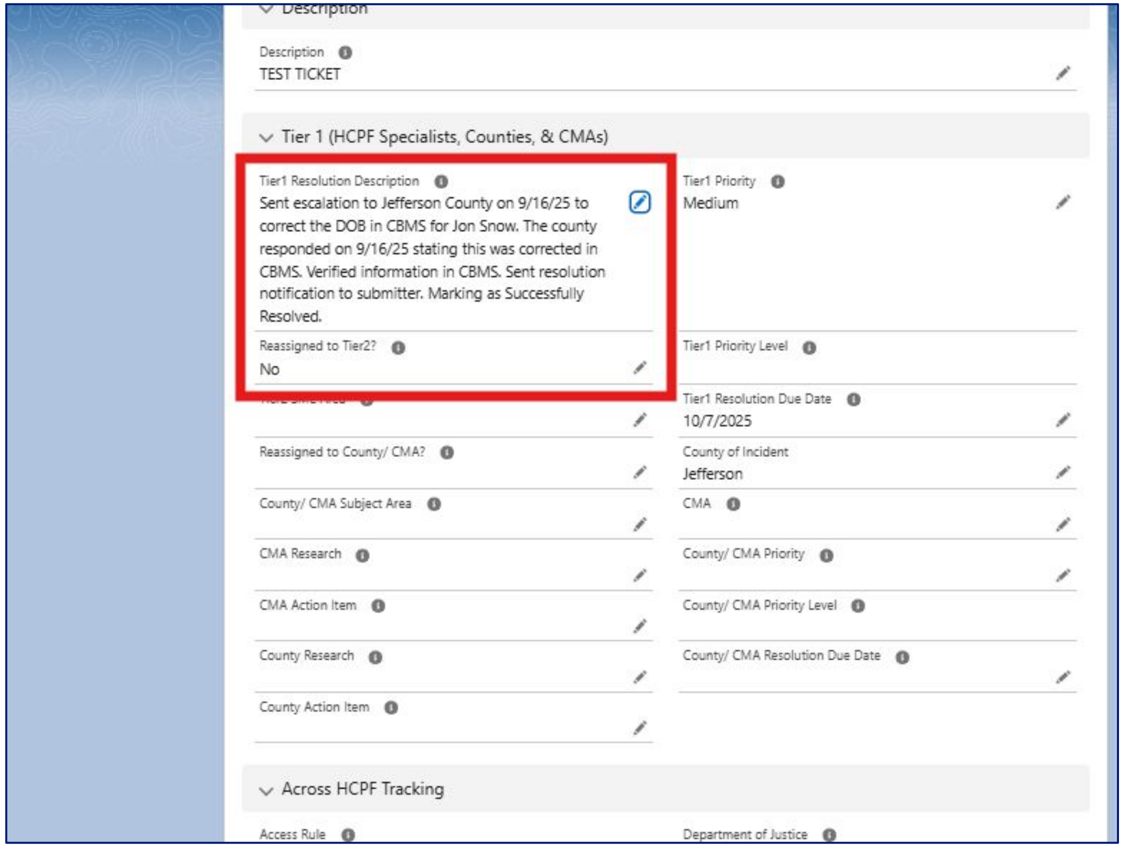
- Tier 1 users must initiate first contact with the submitter after thoroughly reviewing the ticket, to inform them of the current plan to resolve their escalation.



Resolution

- If a Tier 1 user is able to resolve the fully resolve the ticket after completing their initial review, they are taking the following steps:
  - Reaching out to the member/submitter and summarizing how their escalation was either “Successfully Resolved” or “Not Successfully Resolved”.
  - Documenting a quick summary of the ticket resolution in the Tier 1 Resolution Description field.
  - Selecting “No” in the Reassigned to Tier 2? field.
  - Updating the Status field to either “T1: Successfully Resolved” or “T1: Not Successfully Resolved”, as appropriate.

Resolution



Description

Description
TEST TICKET

Tier 1 (HCPF Specialists, Counties, & CMAs)

Tier1 Resolution Description
Sent escalation to Jefferson County on 9/16/25 to correct the DOB in CBMS for Jon Snow. The county responded on 9/16/25 stating this was corrected in CBMS. Verified information in CBMS. Sent resolution notification to submitter. Marking as Successfully Resolved.

Tier1 Priority
Medium

Reassigned to Tier2?
No

Tier1 Priority Level

Tier1 Resolution Due Date
10/7/2025

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

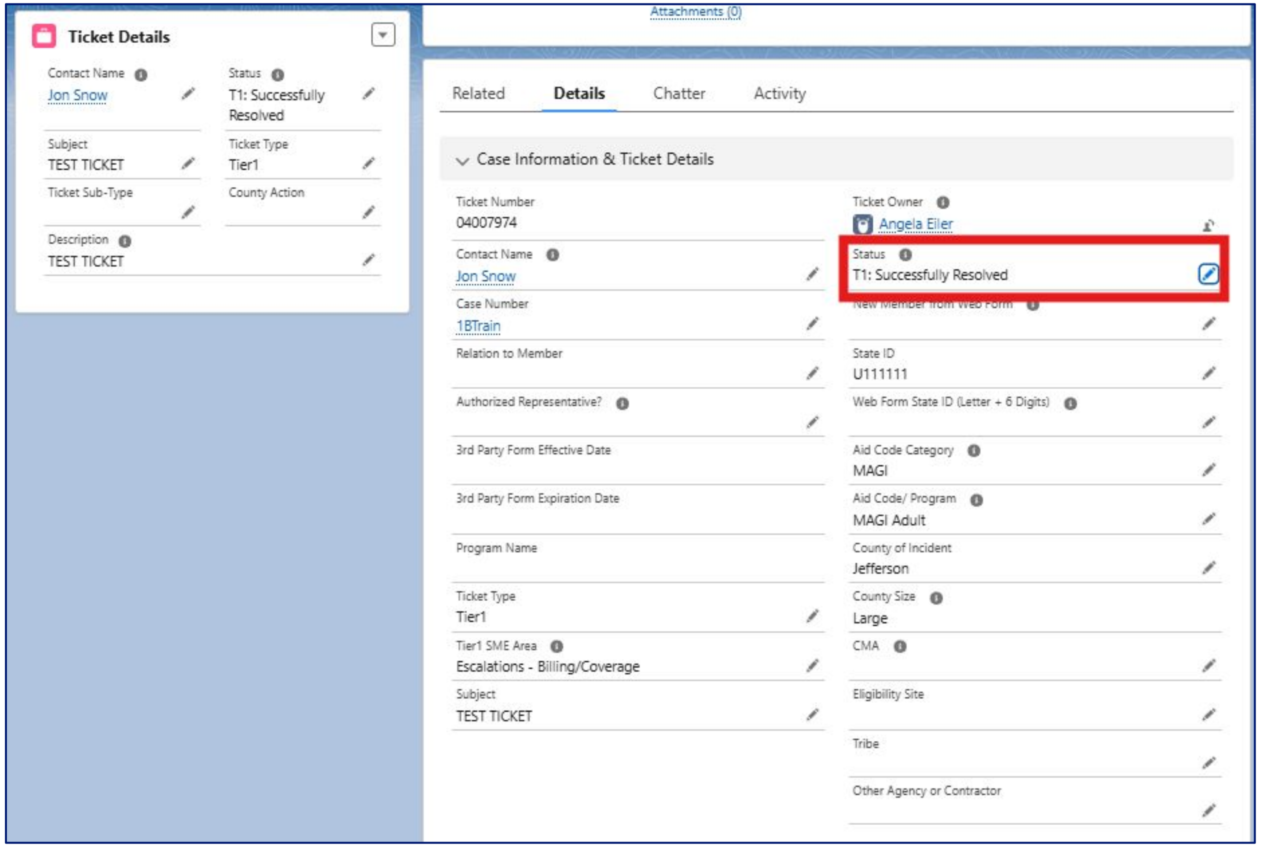
County/ CMA Resolution Due Date

County Action Item

Across HCPF Tracking

Access Rule

Department of Justice



Ticket Details

Contact Name
Jon Snow

Status
T1: Successfully Resolved

Subject
TEST TICKET

Ticket Type
Tier1

Ticket Sub-Type

County Action

Description
TEST TICKET

Attachments (0)

Related | Details | Chatter | Activity

Case Information & Ticket Details

Ticket Number
04007974

Ticket Owner
Angela Eller

Contact Name
Jon Snow

Status
T1: Successfully Resolved

Case Number
1BTrain

New Member from Web Form

Relation to Member

State ID
U111111

Authorized Representative?

Web Form State ID (Letter + 6 Digits)

3rd Party Form Effective Date

Aid Code Category
MAGI

3rd Party Form Expiration Date

Aid Code/ Program
MAGI Adult

Program Name

County of Incident
Jefferson

Ticket Type
Tier1

County Size
Large

Tier1 SME Area
Escalations - Billing/Coverage

CMA

Subject
TEST TICKET

Eligibility Site

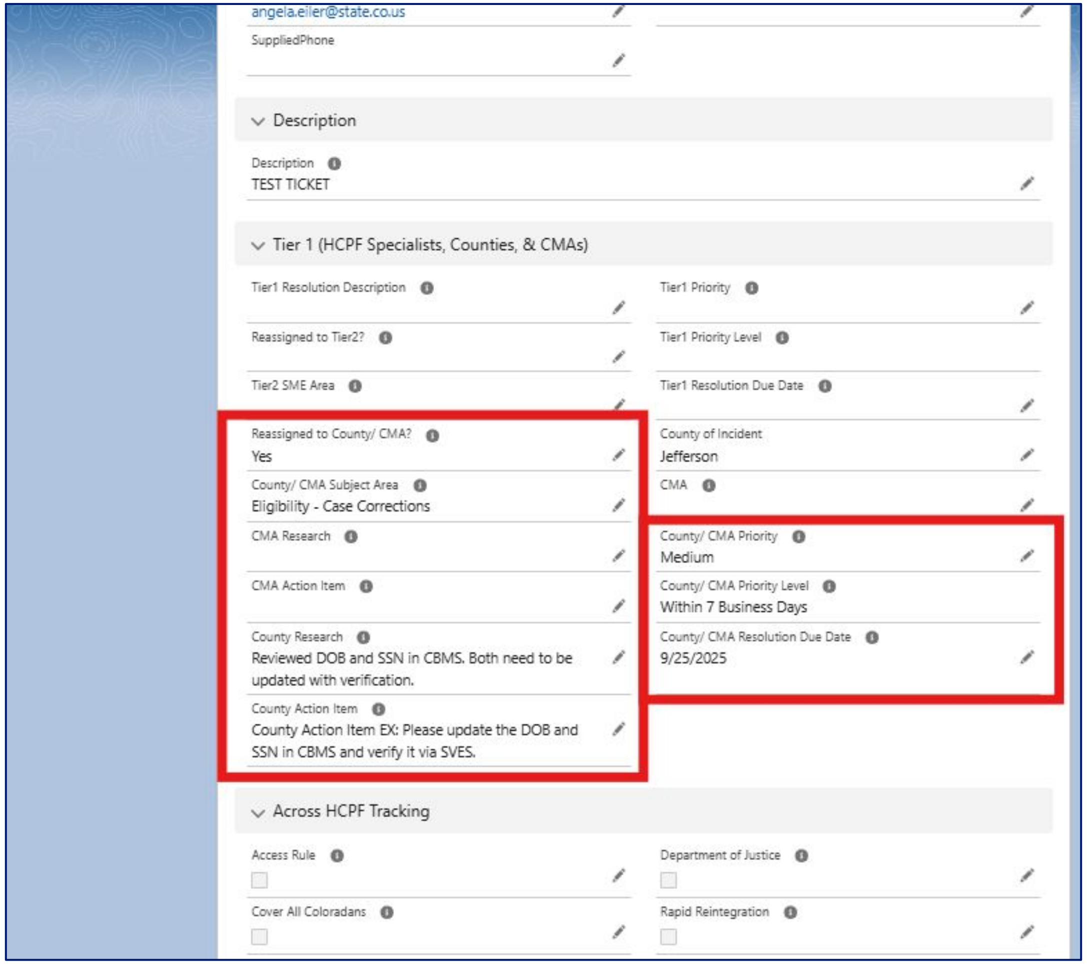
Tribe

Other Agency or Contractor

Reassignment

- If a Tier 1 user is unable to resolve the fully resolve the ticket after completing their initial review and need to transfer to a County/CMA user to further review, they are taking the following steps:
  - Documenting a quick summary of their research of the escalation in the County or CMA Research field.
  - Documenting the directive the County/CMA user needs to take to resolve the ticket in the County or CMA Action Item field.
  - Selecting “Yes” in the Reassigned to County/CMA? Field.
  - Referring to the **County/CMA Subject Area List** to determine the correct selection for the County/CMA Subject Area field based on the nature of the escalation.
  - Entering a County/CMA Resolution Due Date based on County/CMA Priority Level.
  - Updating the Status field to “T1: County/CMA Review”.
  - Changing the owner of the ticket to a County/CMA user.

Reassignment



angela.eiler@state.co.us

SuppliedPhone

Description

Description
TEST TICKET

Tier 1 (HCPF Specialists, Counties, & CMAs)

Tier1 Resolution Description

Tier1 Priority

Reassigned to Tier2?

Tier1 Priority Level

Tier2 SME Area

Tier1 Resolution Due Date

Reassigned to County/ CMA?
Yes

County of Incident
Jefferson

County/ CMA Subject Area
Eligibility - Case Corrections

CMA

CMA Research

County/ CMA Priority
Medium

CMA Action Item

County/ CMA Priority Level
Within 7 Business Days

County Research
Reviewed DOB and SSN in CBMS. Both need to be updated with verification.

County/ CMA Resolution Due Date
9/25/2025

County Action Item
County Action Item EX: Please update the DOB and SSN in CBMS and verify it via SVES.

Across HCPF Tracking

Access Rule

Department of Justice

Cover All Coloradans

Rapid Reintegration

Tier 1 Review: Best Practices

Missing Tier 1 Information

- Having a good understanding of the Tier 1 Review process is crucial to identify if required information is missing.
- If you receive a ticket that is missing important information, such as an action item or research, please tag Angela Eiler or Sarah Rogers for assistance within the ticket as a post.
  - We can connect with the Tier 1 team on your behalf to get the information you need!

Escalations: County/CMA Resolution

Escalations: County/CMA Ticket Resolution

- In this module, you reviewed the different steps a County/CMA user takes when reviewing a ticket for resolution:
  - Review Ticket Information and Tabs
  - Updating Ticket Information
  - Resolution
- We will briefly cover these steps together, as well as review some best practices in Salesforce!

Review Ticket Information and Tabs

- After an Escalation Ticket is assigned to a Tier 1 user, they should first review the information in the following sections:
  - Case Information & Ticket Details Section
  - Webform Submission Details
  - Description
  - Tier 1 (HCPF Specialists, Counties, & CMAs) Section
  - Chatter Tab
  - Related Tab

Updating Ticket Information

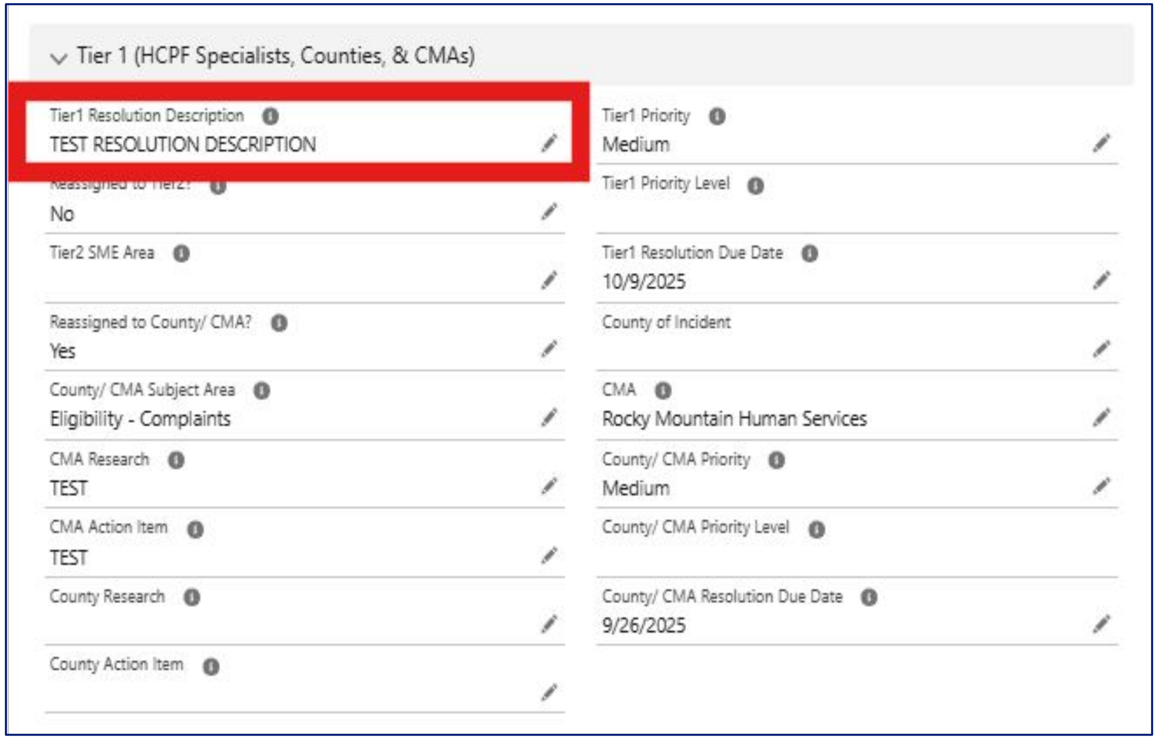
- County/CMA users should update ticket information, depending on the situation. This is to ensure that we are reporting out on ticket information accurately.
- County/CMA have access to update ticket fields in the following sections when working towards a resolution:
  - Case Information & Ticket Details
  - Tier 1 (HCPF Specialists, Counties, & CMAs)
  - Root Cause Analysis

Resolution

Counties and CMAs are still encouraged to triage escalations within their organization; however, the updated escalation process requires that County/CMA users now document the details of their escalation resolutions directly within the Salesforce platform. The following steps should be taken to resolve a ticket:

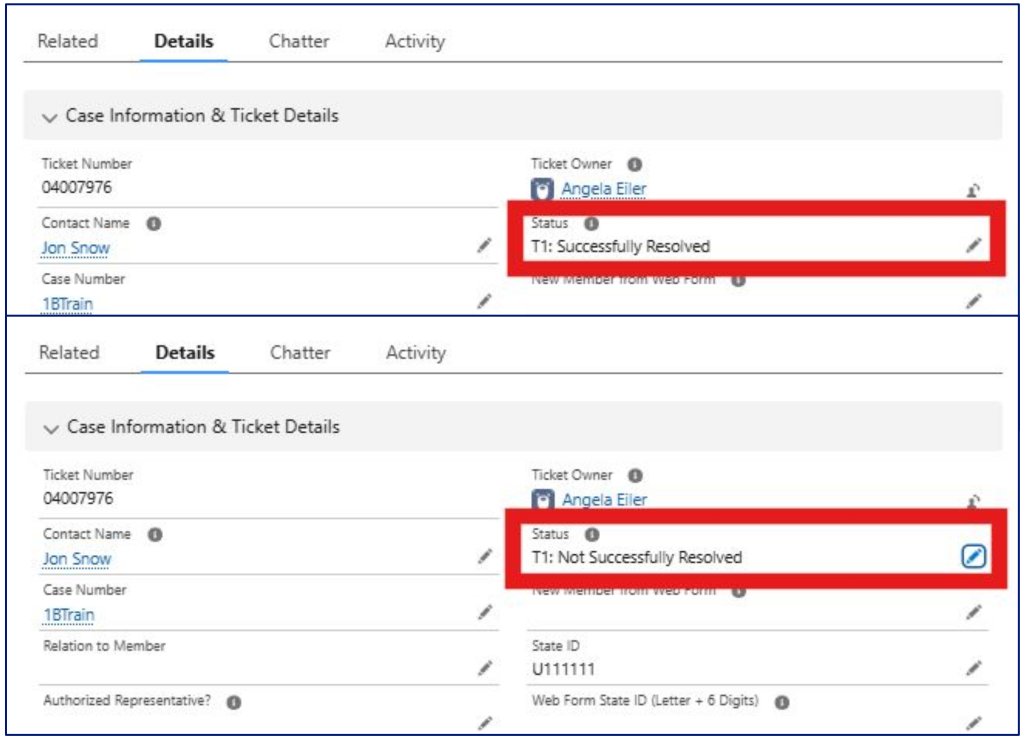
1. Notify the member/submitter and summarize how their escalation was either Successfully Resolved or Not Successfully Resolved.
   a. County/CMA users are encouraged to use the following email templates for email correspondence.
2. Document a quick summary of the ticket resolution in the Tier 1 Resolution Description field.
3. Update the Status field to either “T1: Successfully Resolved” or “T1: Not Successfully Resolved”, as appropriate.

Resolution



Tier 1 (HCPF Specialists, Counties, & CMAs)

Tier1 Resolution Description: TEST RESOLUTION DESCRIPTION	Tier1 Priority: Medium
Reassigned to Tier2?: No	Tier1 Priority Level:
Tier2 SME Area:	Tier1 Resolution Due Date: 10/9/2025
Reassigned to County/ CMA?: Yes	County of Incident:
County/ CMA Subject Area: Eligibility - Complaints	CMA: Rocky Mountain Human Services
CMA Research: TEST	County/ CMA Priority: Medium
CMA Action Item: TEST	County/ CMA Priority Level:
County Research:	County/ CMA Resolution Due Date: 9/26/2025
County Action Item:	



Related Details Chatter Activity

Case Information & Ticket Details

Ticket Number: 04007976	Ticket Owner: Angela Eiler
Contact Name: Jon Snow	Status: T1: Successfully Resolved
Case Number: 1BTrain	New Member from Web Form

Related Details Chatter Activity

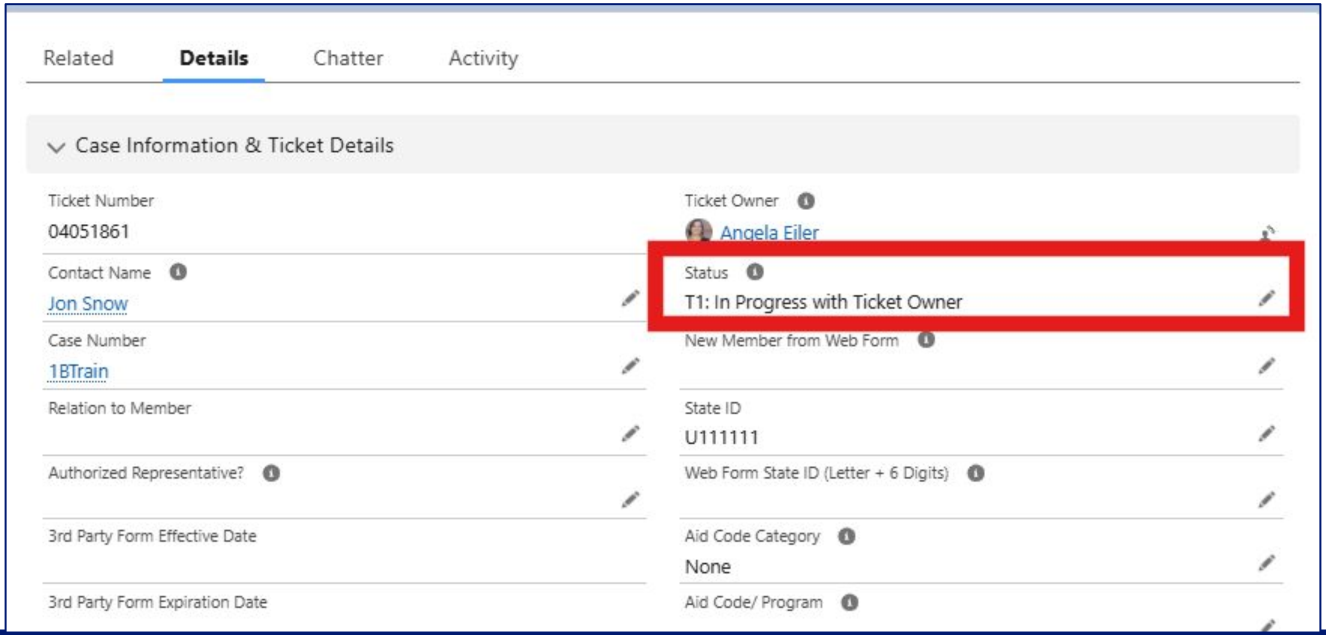
Case Information & Ticket Details

Ticket Number: 04007976	Ticket Owner: Angela Eiler
Contact Name: Jon Snow	Status: T1: Not Successfully Resolved
Case Number: 1BTrain	New Member from Web Form
Relation to Member:	State ID: U111111
Authorized Representative?:	Web Form State ID (Letter + 6 Digits):

County/CMA Resolution: Best Practices!

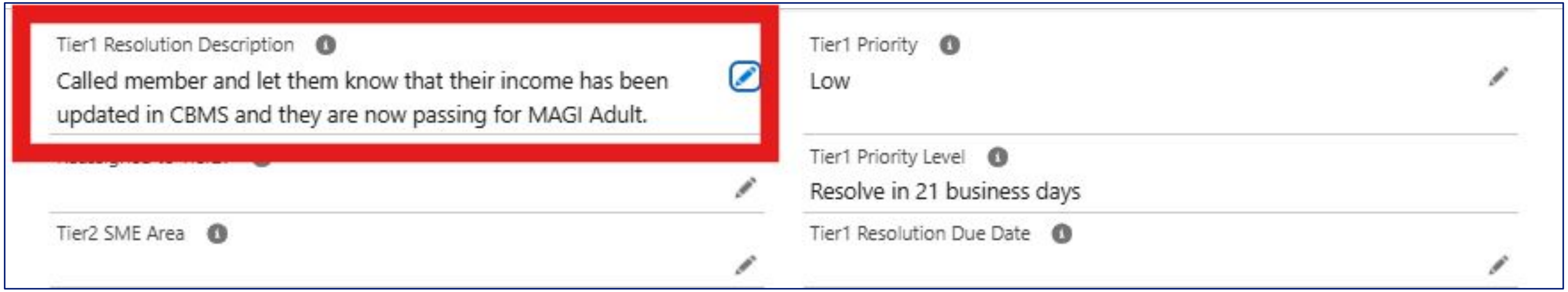
Updating Status

- It is recommended to update the status of your ticket to "T1: In Progress with Ticket Owner" after your initial review.
- This should help users identify which tickets still need to be reviewed.
- This will have no negative impact on your Service Level Agreement.



Tier 1 Resolution Description

- It is recommended to make your resolution descriptions clear and concise.
- These resolution descriptions can be imported into email templates that are communicated out to members/submitters, so ensure that external stakeholders can understand it!



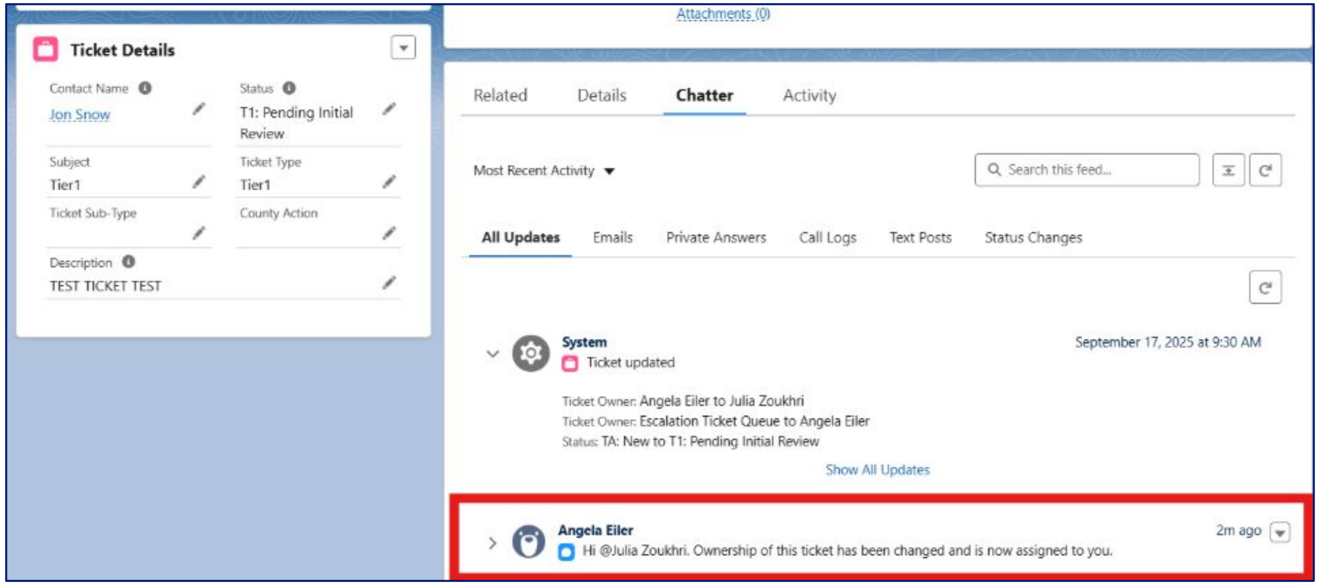
Escalations: Ticket Reassignment

Escalations: Ticket Reassignment

- In the Escalations: Ticket Reassignment module, you reviewed the steps a County/CMA user needs to take to send a ticket back to a Tier 1 user to direct it to the correct County/CMA user or to a Tier 2 user.
  - Identify the Correct Tier 1 User
  - Create a Ticket Comment
  - Status Update
  - Ticket Reassignment
- We will briefly cover these steps together, as well as review some best practices in Salesforce!

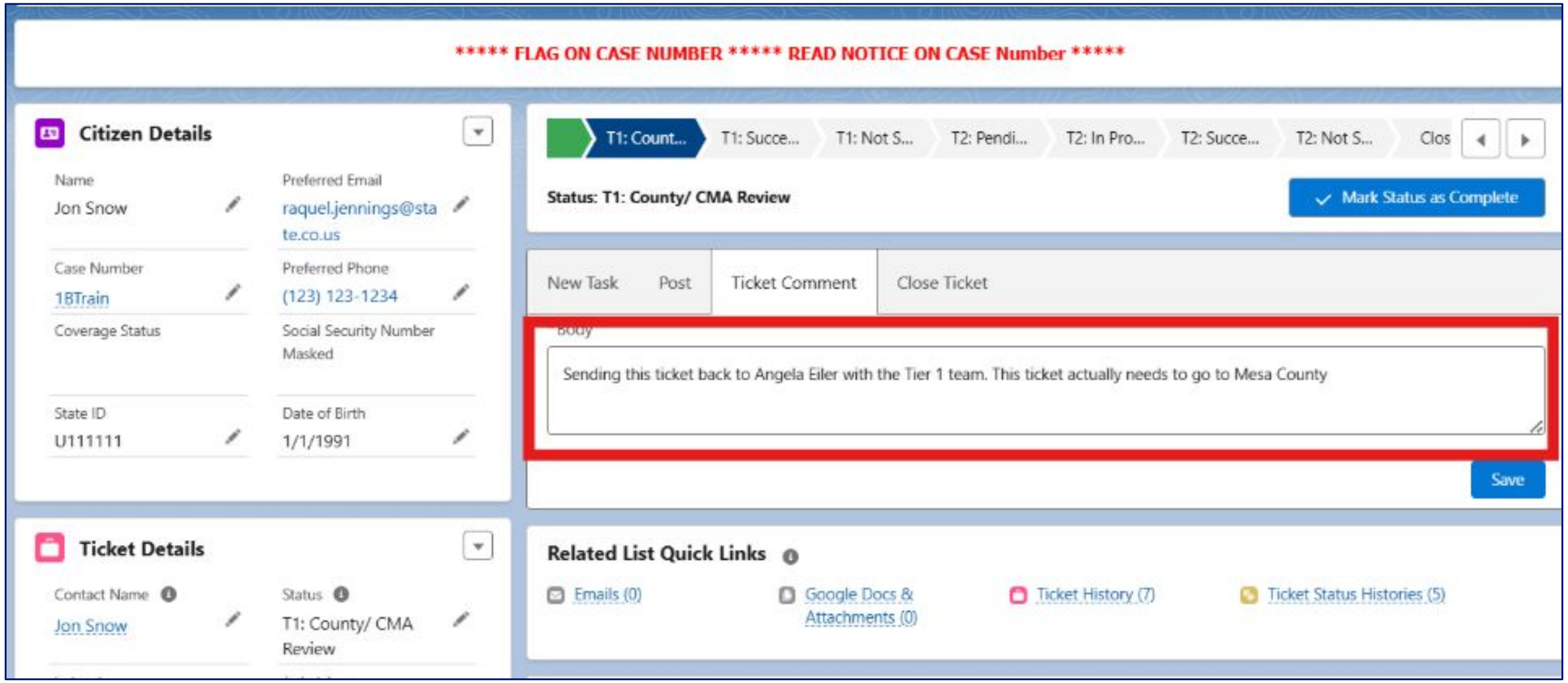
Identify the Correct Tier 1 User

- The County/CMA user will need to identify the Tier 1 user that assigned the ticket to them in the Chatter Tab.
- County/CMA users will need to locate the automatic Post generated when the ticket was assigned to find the correct user.
- If the Tier 1 user cannot be identified, please tag Angela Eiler or Sarah Rogers in a Post for assistance.



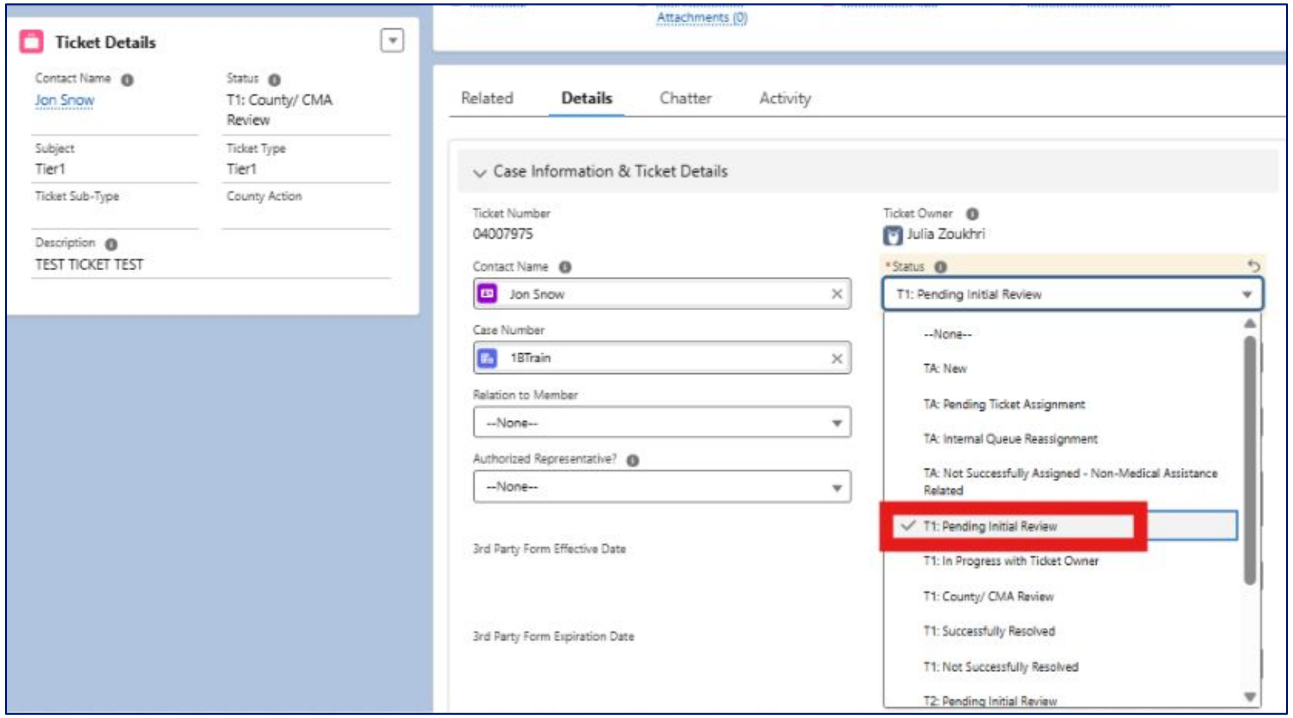
Create a Ticket Comment

- Once the correct Tier 1 user has been identified, County/CMA users should enter a Ticket Comment regarding the reason for the ticket reassignment.



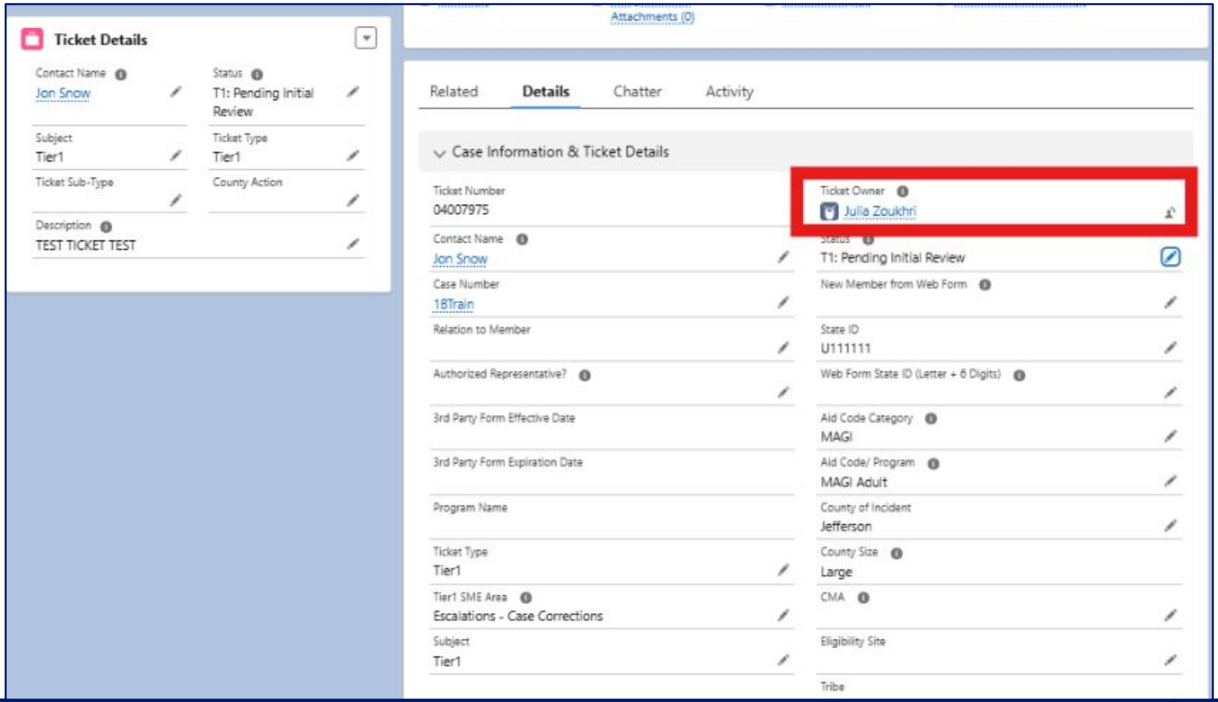
Status Update

- Once the Ticket Comment has been entered, the County/CMA user should update the Status from “T1: County/CMA Review” to “T1: Pending Initial Review”.



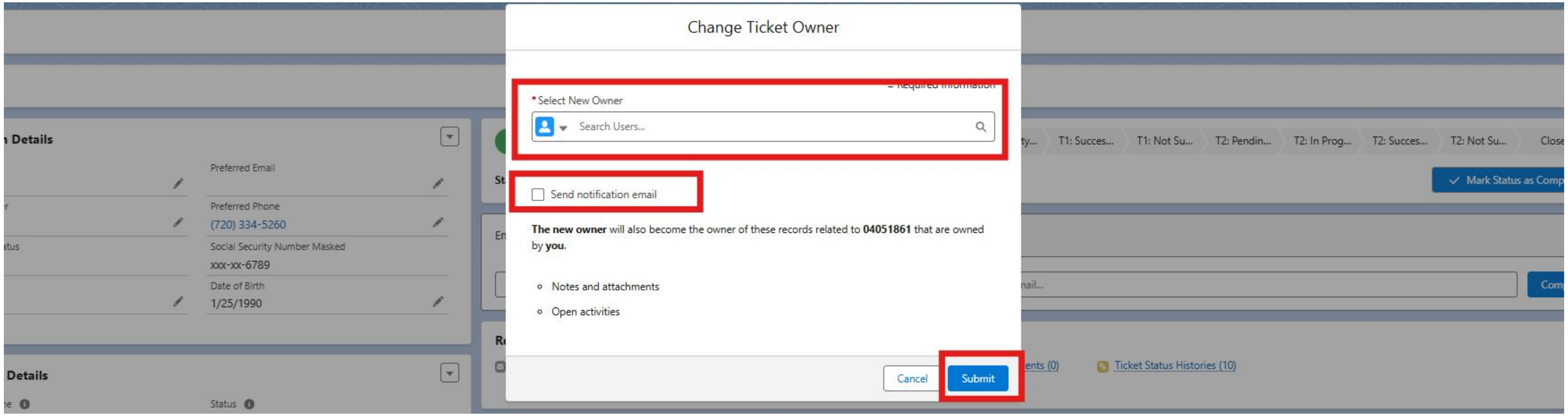
Ticket Reassignment

- Select the person-shaped icon in the Ticket Owner field in the Case Information & Ticket Details section of the ticket.
  - This functionality is also available using the Change Owner button located in the Ticket Header.



Ticket Reassignment

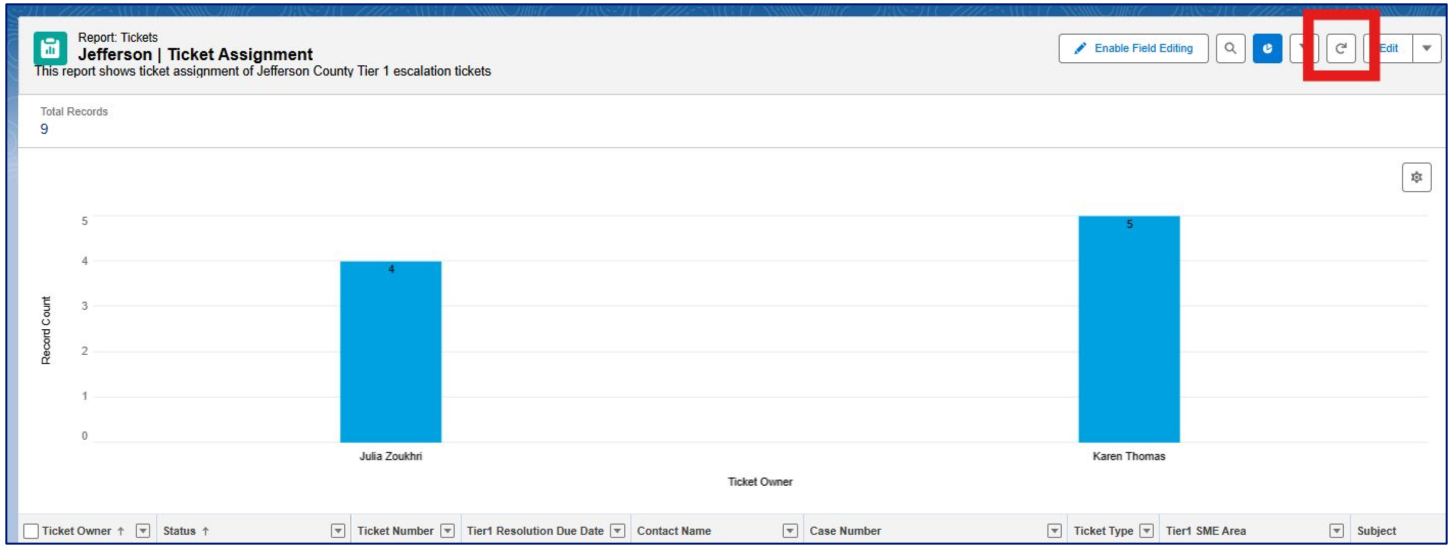
- A separate screen should appear titled “Change Ticket Owner”. The following steps should be taken to ensure that the ticket transfers ownership to another individual properly:
  - Ensure that the icon on the left side of the search bar shows a light blue box with a person’s profile inside
  - Type in the name of the Salesforce User you want to re-assign to in the search bar.
  - Select the person you are re-assigning the ticket to.
  - Make sure the box next to Send Notification Email is checked.
  - Click the blue Change User button to finalize the ticket assignment.



Ticket Reassignment: Best Practices!

Refresh Assignment Report

- Again, Salesforce does not automatically update dashboards/reports.
- It is recommended to refresh your ticket assignment report, using the arrow icon at the top right corner, to ensure a ticket was successfully removed from your ownership.



Q & A

Playlist to Complete Before Part 3

Before Next Meeting, Complete

- Part 3 Module - Communications
  - External Communications
  - Internal Communications
  - Salesforce Sign-In & MFA
- Review & download all resources included in this section!

Salesforce Team Request

- Our Salesforce Team has requested the following information for each user to create their logins:
  - Job Title
  - Mobile Phone Number (For device that will be used for MFA)
- Please get submit this info to hcpf_pca_strategy@state.co.us prior to 10/30/2025!

Next Meeting

Thursday, Oct. 30, 2025

1:30pm-3:00pm

Questions?

Need Help?

HCPF_PCA_Strategy@state.co.us

Submit a County Relations Webform, click here!