

# 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](mailto: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

The image displays two screenshots of the Salesforce interface for the Colorado Department of Health Care Policy & Financing (HCPF).

**Left Screenshot:** Shows the navigation menu. The 'Home' button is highlighted with a red box. Below it, the 'Dashboards' button is also highlighted with a red box.

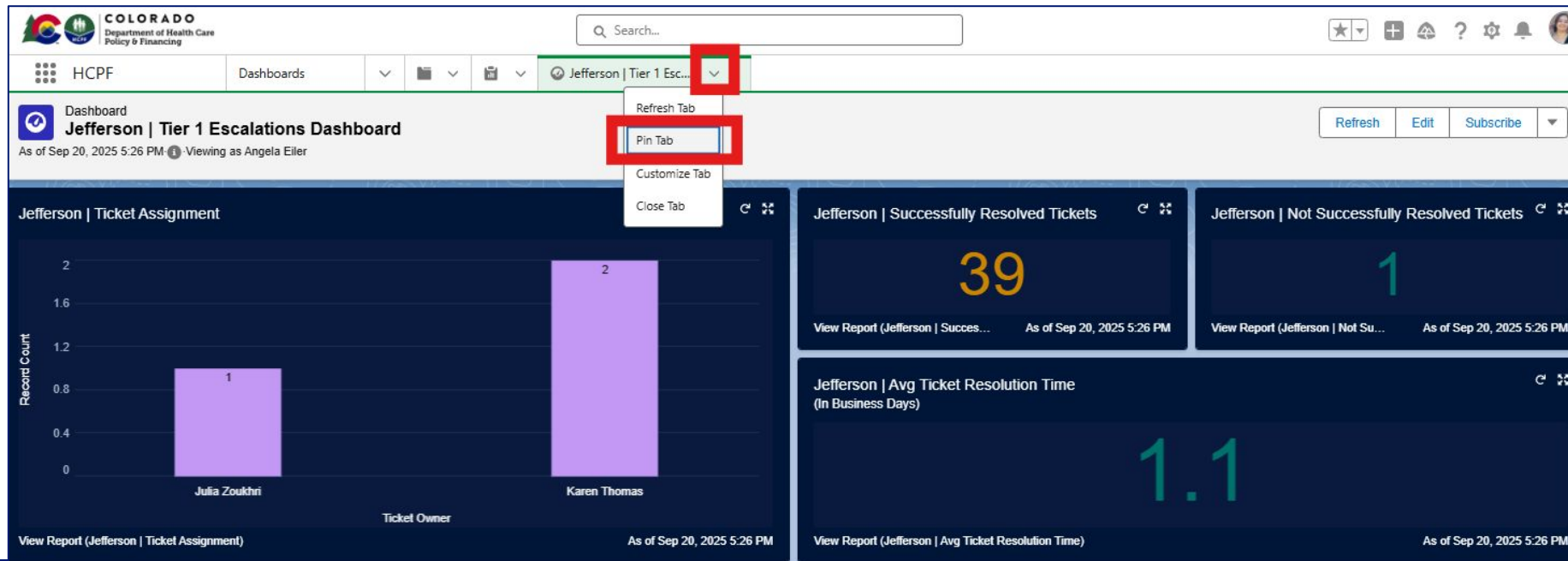
**Right Screenshot:** Shows the 'Dashboards' page. The 'Dashboards' tab is selected. A search bar is highlighted with a red box, containing the text 'Jefferson'. Below the search bar, the 'All Dashboards' section is highlighted with a red box. A table lists the dashboards, with the 'Jefferson | Tier 1 Escalations Dashboard' highlighted by a red box.

| DASHBOARD | Dashboard Name                           | Description | Folder                               | Created By   | Created On        | Subscribed |
|-----------|------------------------------------------|-------------|--------------------------------------|--------------|-------------------|------------|
| Recent    | Jefferson   Tier 1 Escalations Dashboard |             | 2025 Escalations - County Dashboards | Angela Eiler | 7/8/2025, 2:28 PM |            |

# Dashboard Navigation: Best Practices!

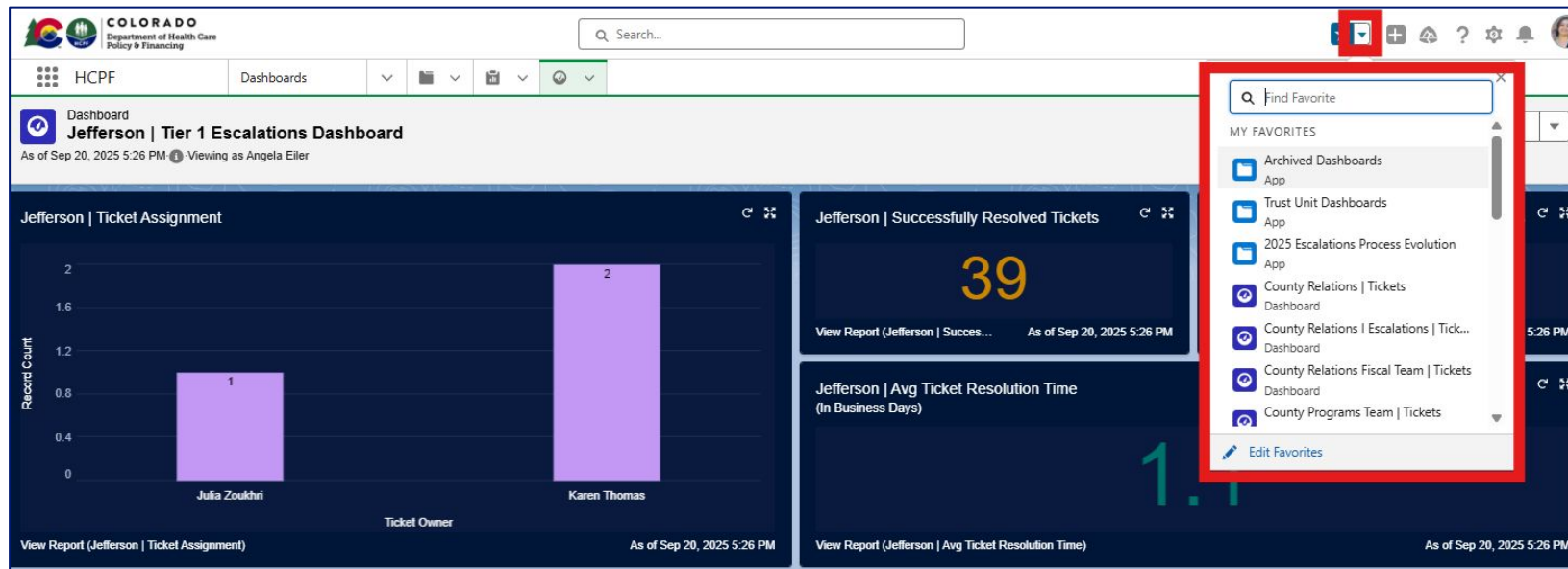
# Pinning the Dashboard

- 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.



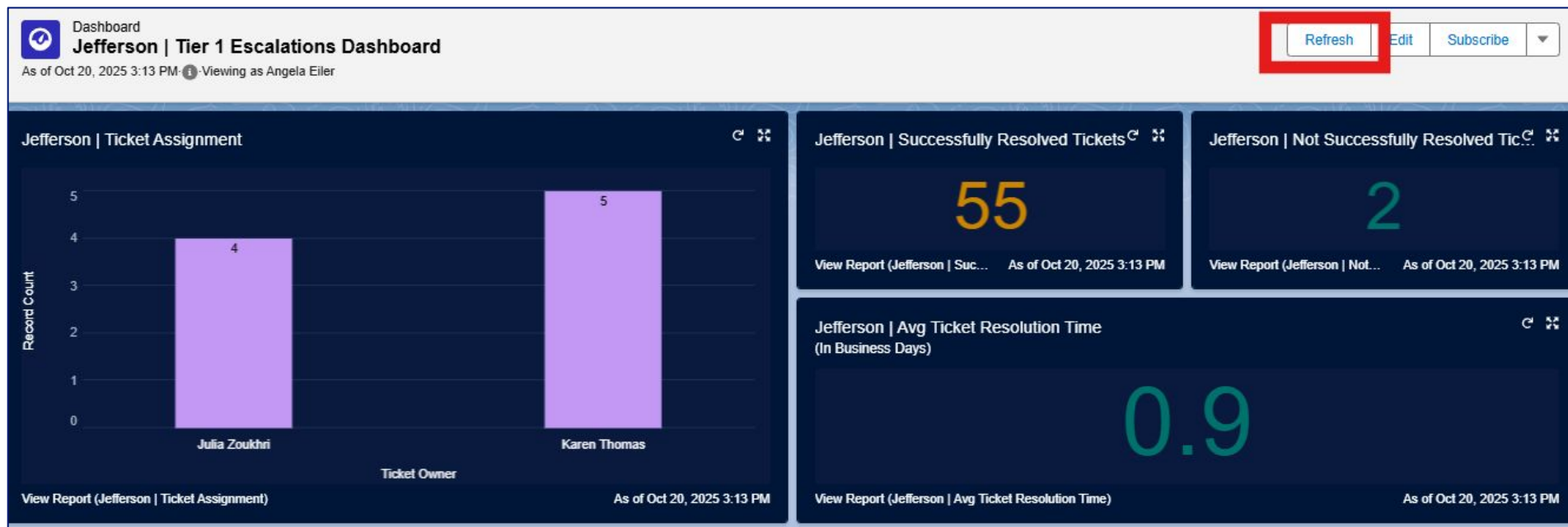
# Adding the Dashboard to Favorites

- 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.



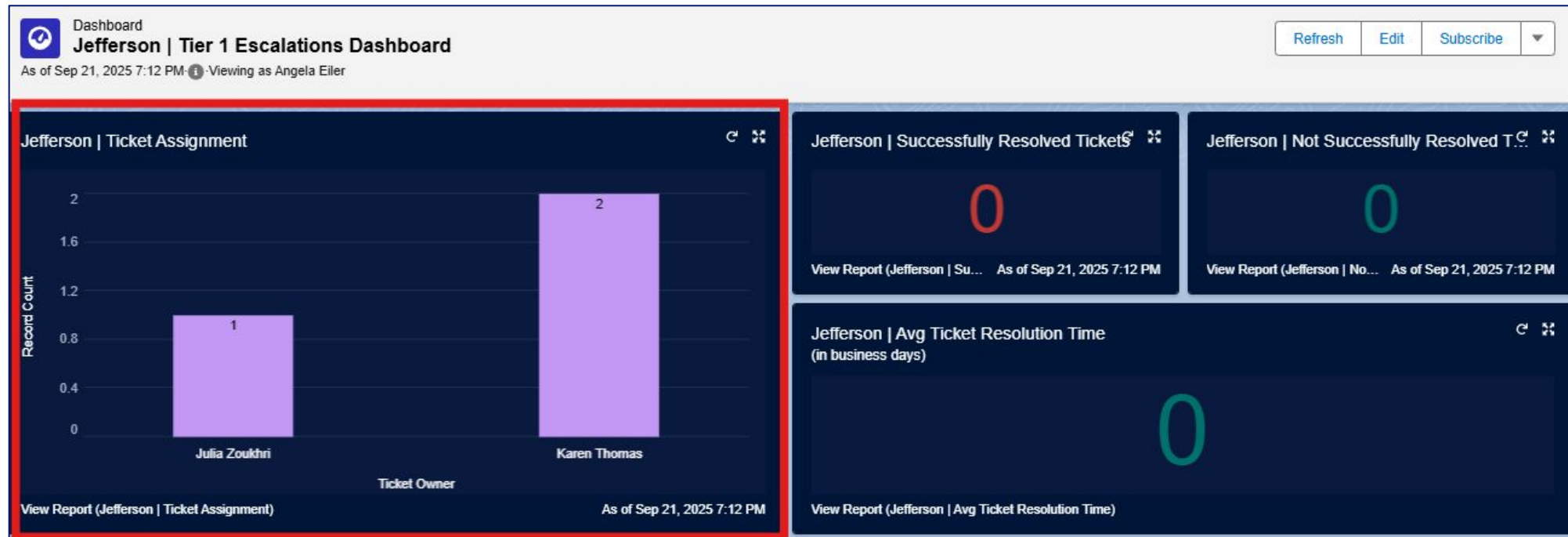
# Escalations: Dashboard Widget Review

# 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!

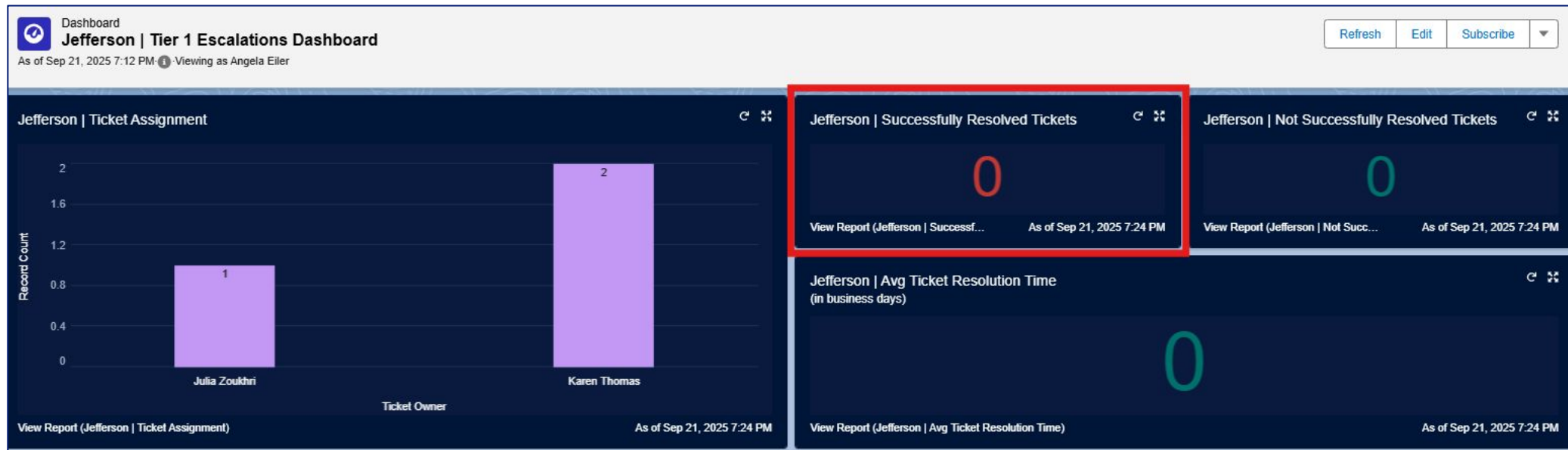
# Ticket Assignment

- 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.



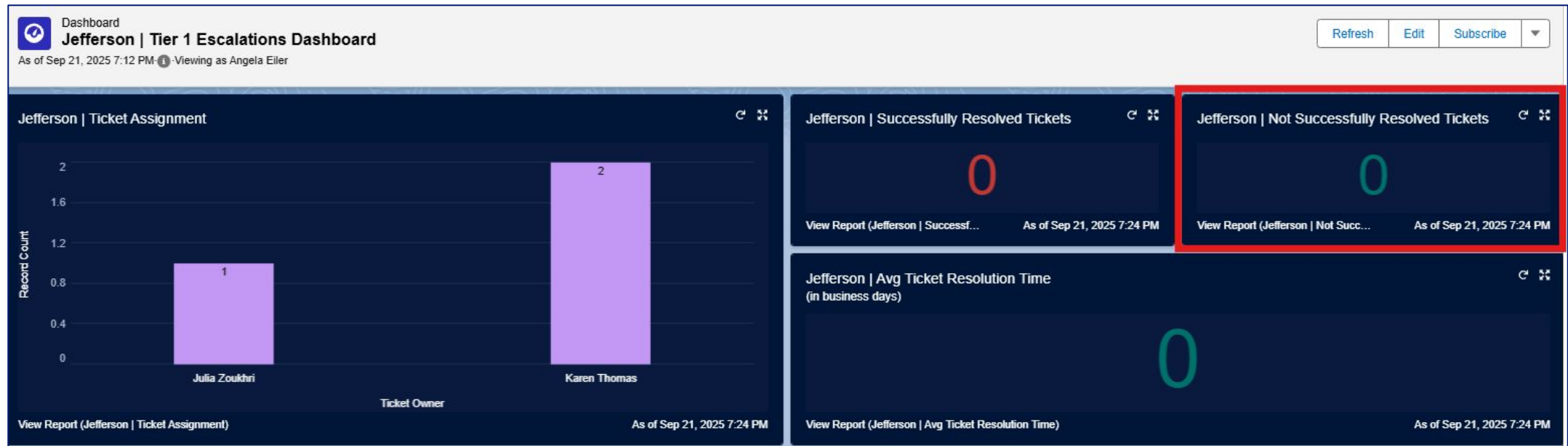
# Successfully Resolved Tickets

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



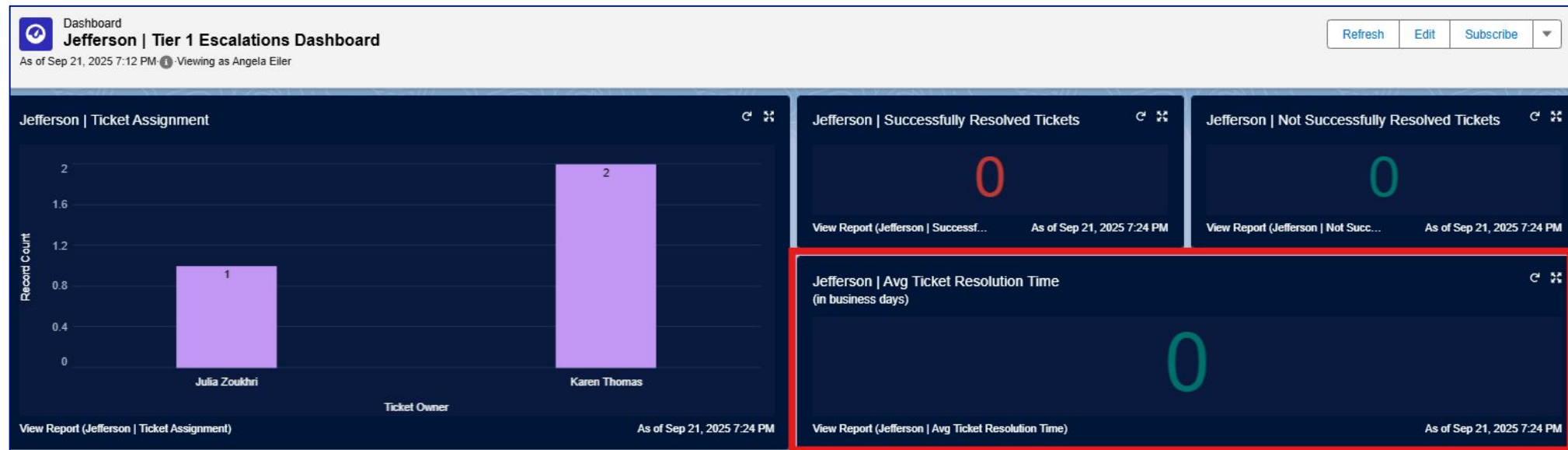
# Not Successfully Resolved Tickets

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



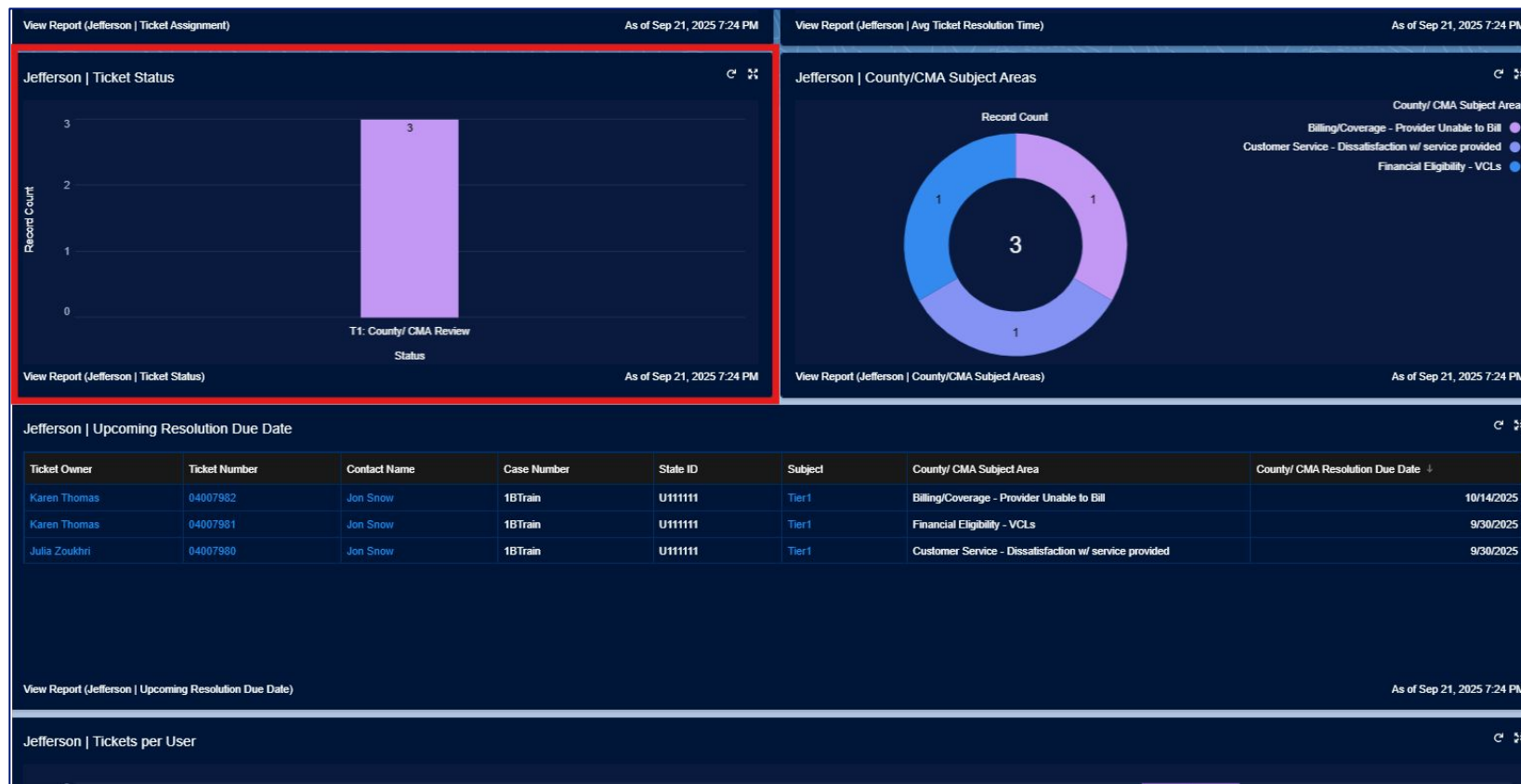
# Average Ticket Resolution Time

- 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”.



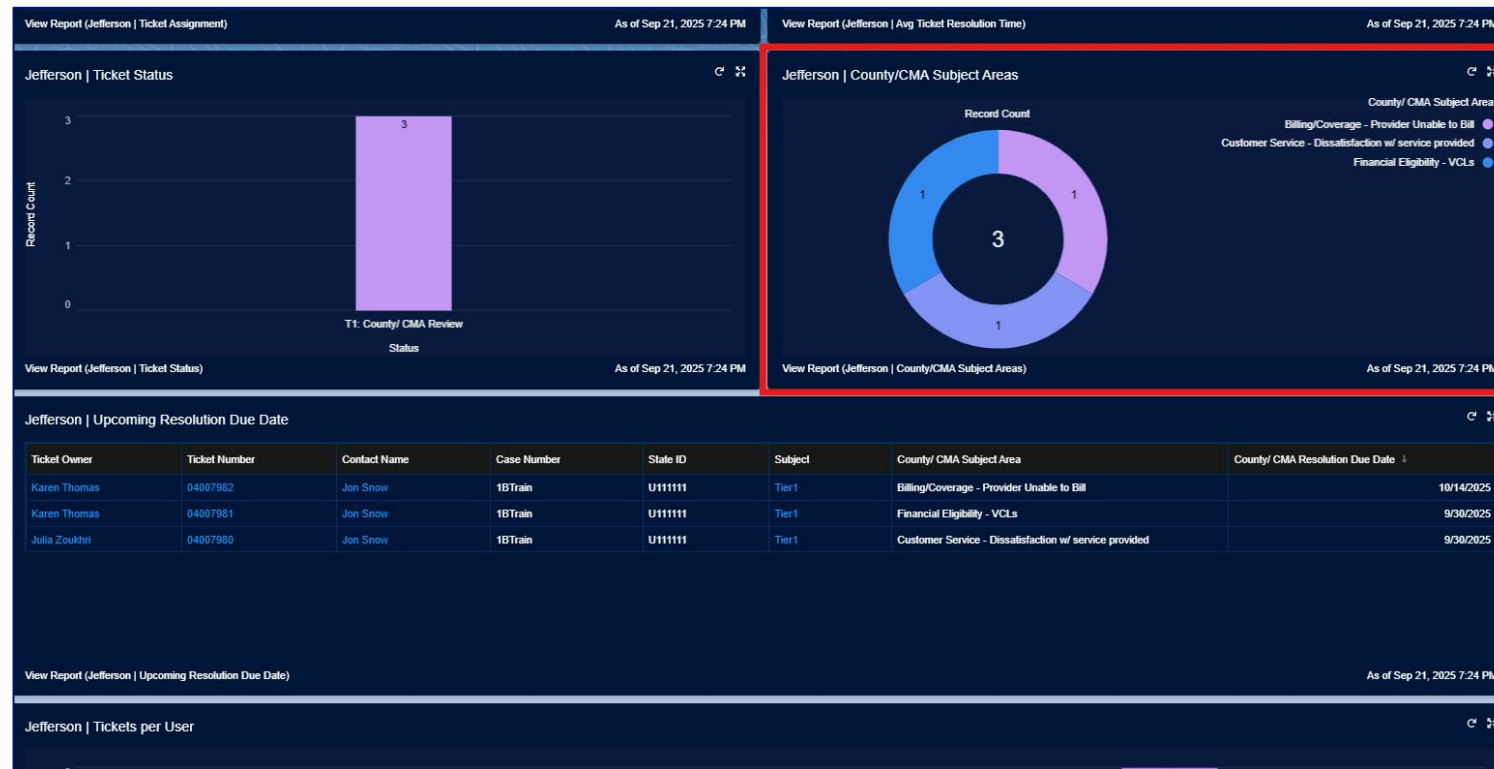
# Ticket Status

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



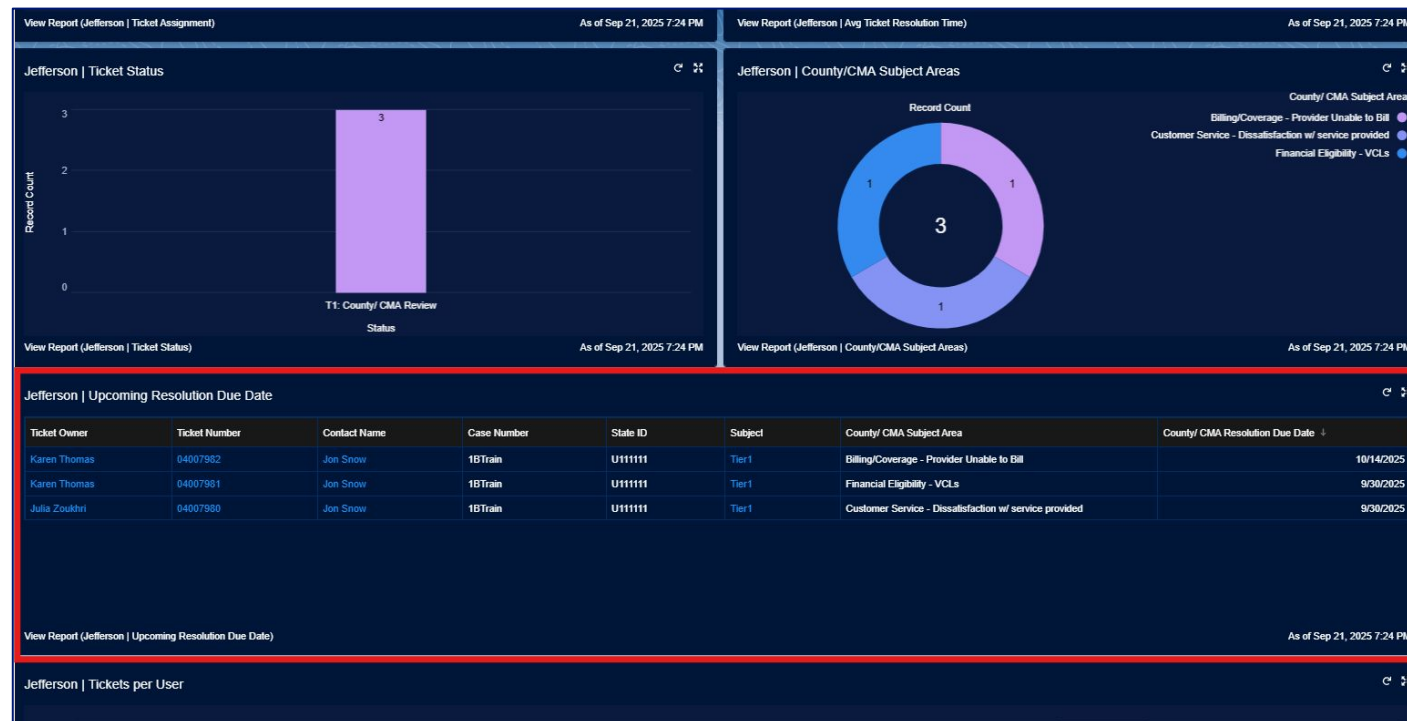
# County/CMA Subject Areas

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



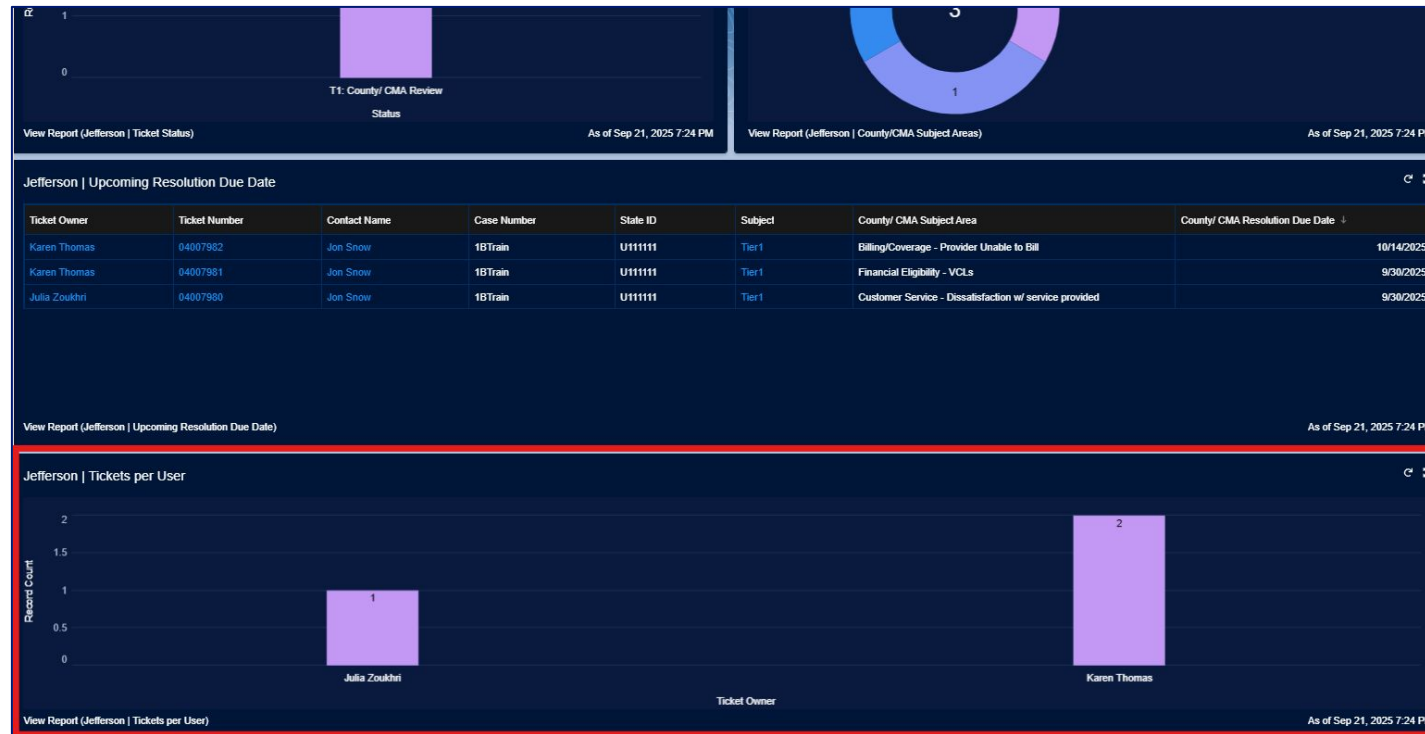
# Upcoming Resolution Due Date

- 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

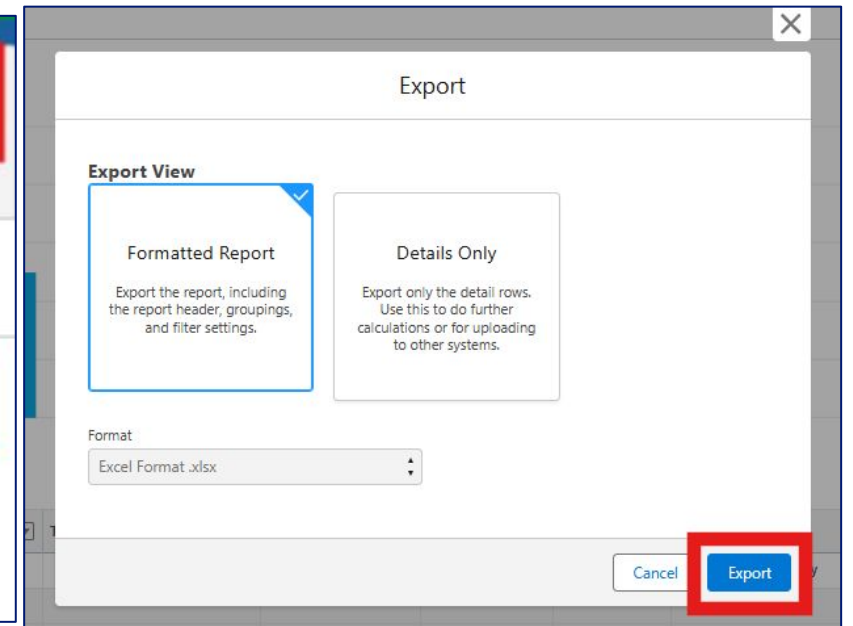
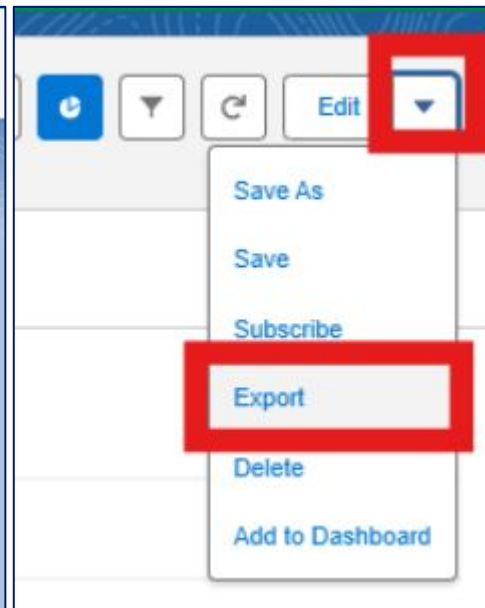
# Exporting Reports

- 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:

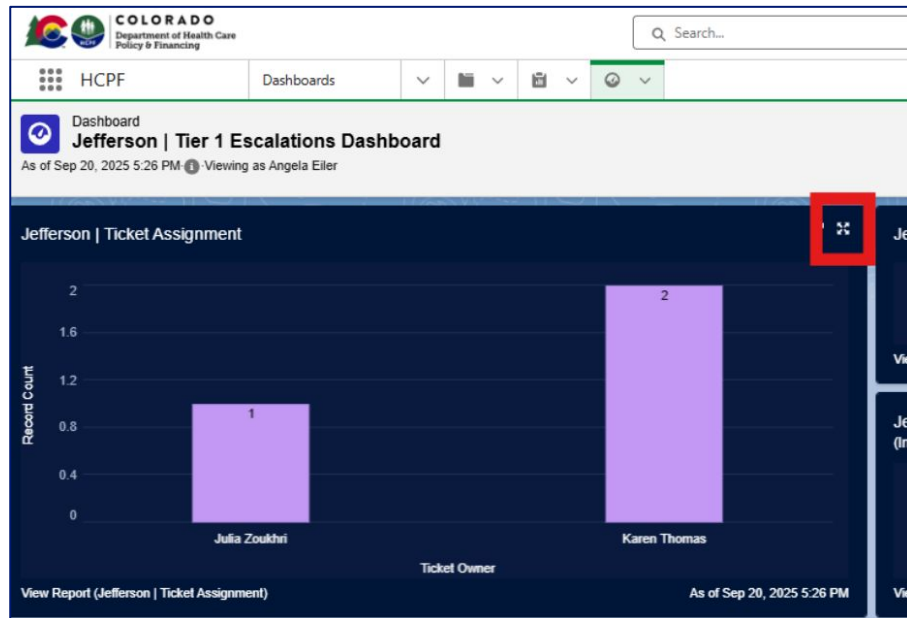
1. Access the report you want to export by selecting the **View Report** link on the bottom of the widget.
2. Select **Export** in the dropdown next to the Edit button on the top right side of the screen.
3. Export a Formatted Report in an Excel file.



# 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:

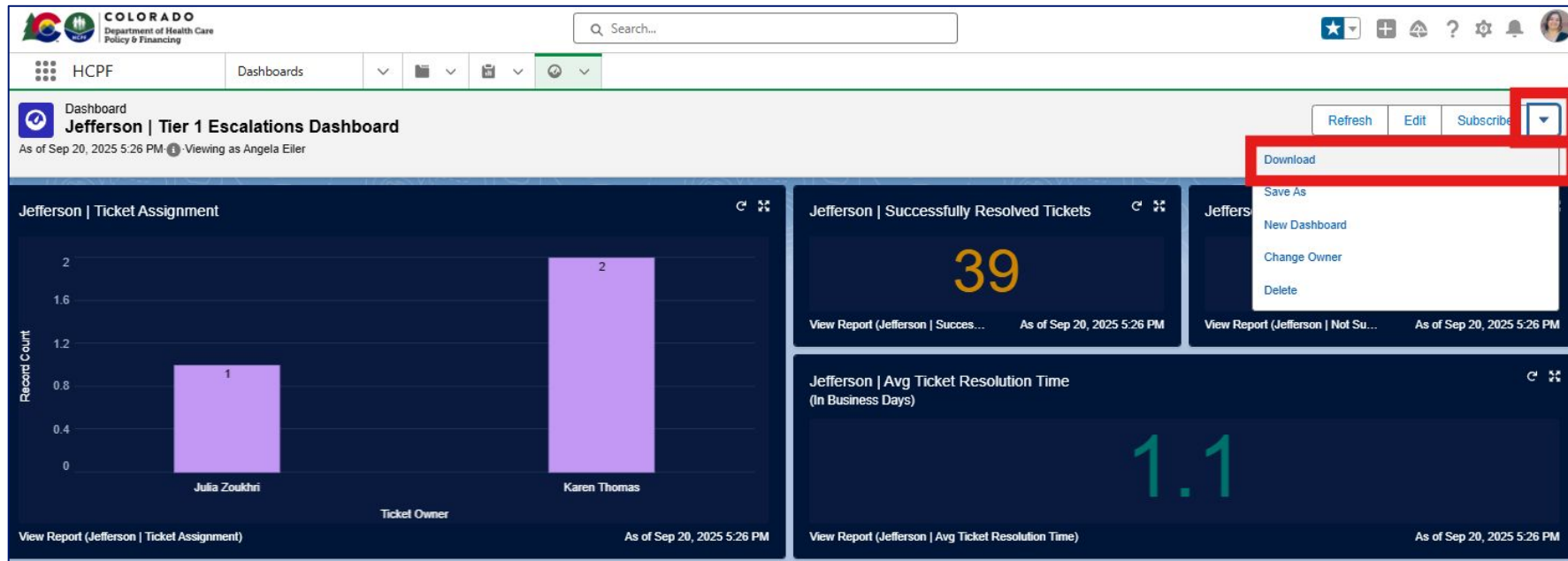
1. Access the report chart you want to export by selecting the expanding arrows icon on the top of the widget.
2. Select the download icon on the top right of the window to export the chart as a PNG file.



# 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

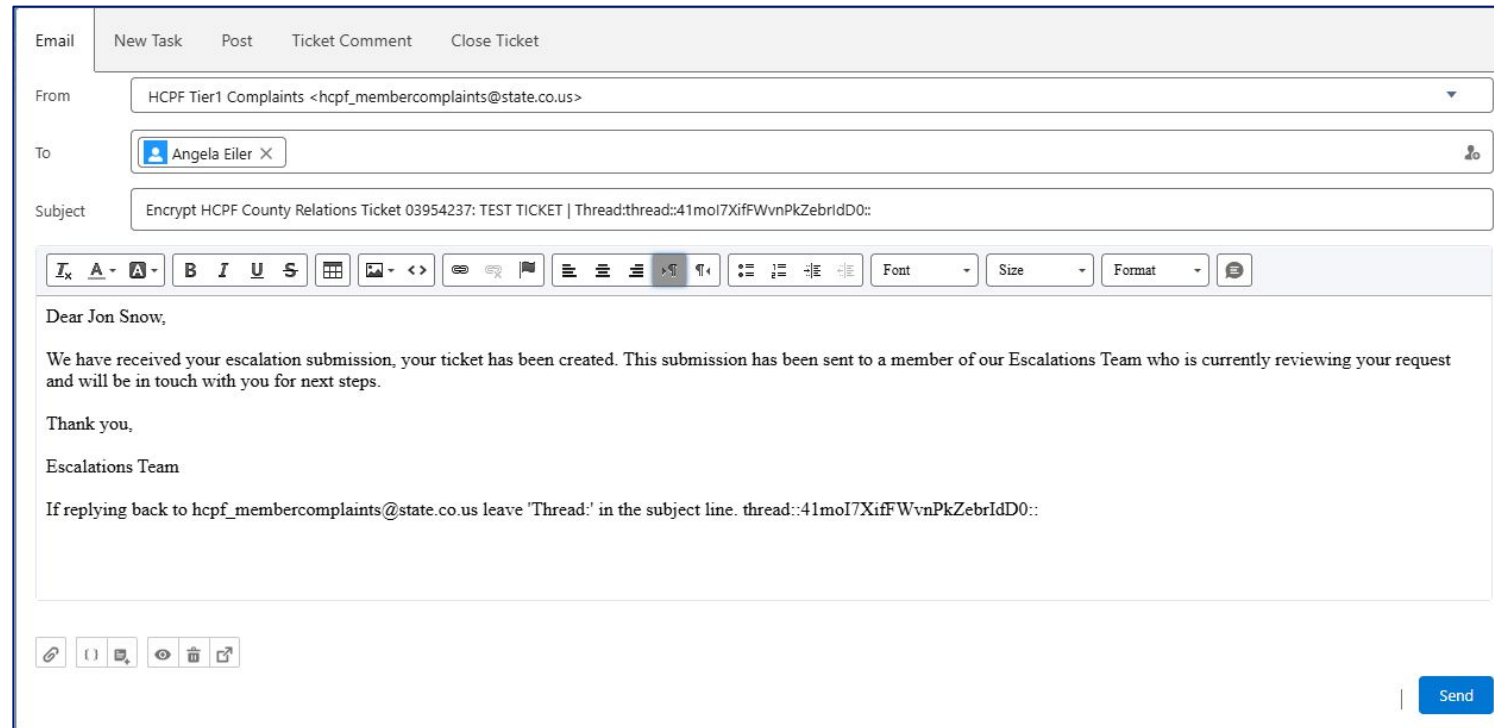
- In the Escalations: Tier 1 Module module, you reviewed the different steps an internal Tier 1 user takes when reviewing a ticket for resolution or transfer:
  - Review Ticket Information and Tabs
  - Initial Member-Centered Contact
  - Resolution
  - Reassignment
- We will briefly cover these steps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



The screenshot shows an email composition interface. At the top, there are tabs: "Email", "New Task", "Post", "Ticket Comment", and "Close Ticket". The "Email" tab is selected. Below the tabs, the "From" field is set to "HCPF Tier1 Complaints <hcpf\_membercomplaints@state.co.us>". The "To" field contains a contact named "Angela Eiler" with a small "X" icon to its right. The "Subject" field is populated with "Encrypt HCPF County Relations Ticket 03954237: TEST TICKET | Thread:thread::41moI7XiffWvnPkZebrIdD0:". Below the subject field is a rich text editor toolbar with various icons for text formatting (bold, italic, underline, strikethrough), alignment, and other functions. The email body text reads: "Dear Jon Snow," followed by a paragraph: "We have received your escalation submission, your ticket has been created. This submission has been sent to a member of our Escalations Team who is currently reviewing your request and will be in touch with you for next steps." Below this is "Thank you," and "Escalations Team". At the bottom of the body, it says: "If replying back to hcpf\_membercomplaints@state.co.us leave 'Thread:' in the subject line. thread::41moI7XiffWvnPkZebrIdD0:". At the bottom right of the composition area is a blue "Send" button.

# 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

County of Incident ⓘ  
Jefferson

CMA ⓘ

County/ CMA Priority ⓘ

County/ CMA Priority Level ⓘ

County/ CMA Resolution Due Date ⓘ

Reassigned to County/ CMA? ⓘ

County/ CMA Subject Area ⓘ

CMA Research ⓘ

CMA Action Item ⓘ

County Research ⓘ

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 Sub-Type ⓘ  
Tier1

Description ⓘ  
TEST TICKET

County Action ⓘ

Attachments (0)

Related **Details** Chatter Activity

▼ Case Information & Ticket Details

Ticket Number ⓘ  
04007974

Ticket Owner ⓘ  
[Angela Eiler](#)

Contact Name ⓘ  
[Jon Snow](#)

Status ⓘ  
T1: Successfully Resolved

Case Number ⓘ  
[18Train](#)

Relation to Member ⓘ  
New Member from Web Form ⓘ

Authorized Representative? ⓘ

State ID ⓘ  
U111111

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 ⓘ

CMA ⓘ

Escalations - Billing/Coverage ⓘ

Eligibility Site ⓘ

Subject ⓘ  
TEST TICKET

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

|                                                                                                              |                                                        |
|--------------------------------------------------------------------------------------------------------------|--------------------------------------------------------|
| <a href="mailto:angela.eiler@state.co.us">angela.eiler@state.co.us</a>                                       |                                                        |
| SuppliedPhone                                                                                                |                                                        |
| ▼ Description                                                                                                |                                                        |
| Description ⓘ<br>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? ⓘ<br>Yes                                                                          | County of Incident<br>Jefferson                        |
| County/ CMA Subject Area ⓘ                                                                                   | CMA ⓘ                                                  |
| Eligibility - Case Corrections                                                                               | County/ CMA Priority ⓘ<br>Medium                       |
| CMA Research ⓘ                                                                                               | County/ CMA Priority Level ⓘ<br>Within 7 Business Days |
| CMA Action Item ⓘ                                                                                            | County/ CMA Resolution Due Date ⓘ<br>9/25/2025         |
| County Research ⓘ<br>Reviewed DOB and SSN in CBMS. Both need to be updated with verification.                |                                                        |
| County Action Item ⓘ<br>County Action Item EX: Please update the DOB and SSN in CBMS and verify it via SVES. |                                                        |
| ▼ Across HCPF Tracking                                                                                       |                                                        |
| Access Rule ⓘ<br><input type="checkbox"/>                                                                    | Department of Justice ⓘ<br><input type="checkbox"/>    |
| Cover All Coloradans ⓘ<br><input type="checkbox"/>                                                           | Rapid Reintegration ⓘ<br><input type="checkbox"/>      |

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

Related Details Chatter Activity

▼ Case Information & Ticket Details

|                            |                                       |
|----------------------------|---------------------------------------|
| Ticket Number<br>04007976  | Ticket Owner ⓘ<br>Angela Eiler        |
| Contact Name ⓘ<br>Jon Snow | Status ⓘ<br>T1: Successfully Resolved |
| Case Number<br>18Train     | New member from web form ⓘ            |

Related Details Chatter Activity

▼ Case Information & Ticket Details

|                              |                                           |
|------------------------------|-------------------------------------------|
| Ticket Number<br>04007976    | Ticket Owner ⓘ<br>Angela Eiler            |
| Contact Name ⓘ<br>Jon Snow   | Status ⓘ<br>T1: Not Successfully Resolved |
| Case Number<br>18Train       | New member from web form ⓘ                |
| Relation to Member           | State ID<br>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.

The screenshot displays a web interface for managing tickets. At the top, there are tabs for 'Related', 'Details' (which is selected), 'Chatter', and 'Activity'. Below the tabs is a section titled 'Case Information & Ticket Details'. This section contains two columns of fields. The left column includes 'Ticket Number' (04051861), 'Contact Name' (Jon Snow), 'Case Number' (18Train), 'Relation to Member', 'Authorized Representative?', '3rd Party Form Effective Date', and '3rd Party Form Expiration Date'. The right column includes 'Ticket Owner' (Angela Eiler), 'Status' (T1: In Progress with Ticket Owner), 'New Member from Web Form', 'State ID' (U111111), 'Web Form State ID (Letter + 6 Digits)', 'Aid Code Category' (None), and 'Aid Code/ Program'. The 'Status' field is highlighted with a red rectangular box. Each field has a small edit icon (pencil) to its right.

# 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!

|                                                                                                                                                                     |                                                                   |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------|
| <div>Tier1 Resolution Description ⓘ<br/>Called member and let them know that their income has been updated in CBMS and they are now passing for MAGI Adult. ⓘ</div> | <div>Tier1 Priority ⓘ<br/>Low ⓘ</div>                             |
| <div>Tier2 SME Area ⓘ ⓘ</div>                                                                                                                                       | <div>Tier1 Priority Level ⓘ<br/>Resolve in 21 business days</div> |
|                                                                                                                                                                     | <div>Tier1 Resolution Due Date ⓘ ⓘ</div>                          |

# 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.

The screenshot displays a ticket management interface. On the left, the 'Ticket Details' panel shows the following information:

- Contact Name: Jon Snow
- Status: T1: Pending Initial Review
- Subject: Tier1
- Ticket Type: Tier1
- Ticket Sub-Type: County Action
- Description: TEST TICKET TEST

On the right, the 'Chatter' tab is active, showing a feed of updates. The most recent activity is a system message dated September 17, 2025 at 9:30 AM, stating: 'Ticket updated. Ticket Owner: Angela Eiler to Julia Zoukhri. Ticket Owner: Escalation Ticket Queue to Angela Eiler. Status: TA: New to T1: Pending Initial Review.' Below this, a post from Angela Eiler is highlighted with a red box, stating: 'Hi @Julia Zoukhri. Ownership of this ticket has been changed and is now assigned to you.' The post is timestamped '2m ago'.

# 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.

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

**Citizen Details**

Name

Jon Snow

Preferred Email

raquel.jennings@state.co.us

Case Number

18Train

Coverage Status

State ID

U111111

Preferred Phone

(123) 123-1234

Social Security Number

Masked

Date of Birth

1/1/1991

T1: Count...

T1: Succe...

T1: Not S...

T2: Pendi...

T2: In Pro...

T2: Succe...

T2: Not S...

Clos

Status: T1: County/ CMA Review

Mark Status as Complete

New Task

Post

Ticket Comment

Close Ticket

body

Sending this ticket back to Angela Eiler with the Tier 1 team. This ticket actually needs to go to Mesa County

Save

**Ticket Details**

Contact Name

Jon Snow

Status

T1: County/ CMA Review

**Related List Quick Links**

Emails (0)

Google Docs & Attachments (0)

Ticket History (7)

Ticket Status Histories (5)

# 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”.

The screenshot displays a web application interface for managing tickets. On the left, a 'Ticket Details' sidebar shows fields for Contact Name (Jon Snow), Status (T1: County/ CMA Review), Subject (Tier1), Ticket Type (Tier1), Ticket Sub-Type (County Action), and Description (TEST TICKET TEST). The main area, titled 'Case Information & Ticket Details', contains fields for Ticket Number (04007975), Contact Name (Jon Snow), Case Number (18Train), Relation to Member (--None--), Authorized Representative? (--None--), 3rd Party Form Effective Date, and 3rd Party Form Expiration Date. On the right, the 'Ticket Owner' is listed as Julia Zoukhri, and the 'Status' dropdown menu is open, showing a list of options. The option 'T1: Pending Initial Review' is highlighted with a red box, indicating the next step in the process.

| Field                          | Value                      |
|--------------------------------|----------------------------|
| Contact Name                   | Jon Snow                   |
| Status                         | T1: County/ CMA Review     |
| Subject                        | Tier1                      |
| Ticket Type                    | Tier1                      |
| Ticket Sub-Type                | County Action              |
| Description                    | TEST TICKET TEST           |
| Ticket Number                  | 04007975                   |
| Contact Name                   | Jon Snow                   |
| Case Number                    | 18Train                    |
| Relation to Member             | --None--                   |
| Authorized Representative?     | --None--                   |
| 3rd Party Form Effective Date  |                            |
| 3rd Party Form Expiration Date |                            |
| Ticket Owner                   | Julia Zoukhri              |
| Status                         | 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.

The screenshot displays the 'Ticket Details' form. On the left is a sidebar with a 'Ticket Details' section containing fields for Contact Name (Jon Snow), Status (T1: Pending Initial Review), Subject (Tier1), Ticket Type (Tier1), Ticket Sub-Type, County Action, Description (TEST TICKET TEST), and a Description field. The main area is titled 'Case Information & Ticket Details' and contains a grid of fields. The 'Ticket Owner' field, showing 'Julia Zoukhri' with a person icon, is highlighted with a red rectangular box. Other fields in the grid include Ticket Number (04007975), 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 - Case Corrections, Subject (Tier1), Status (T1: Pending Initial Review), 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, and Tribe.

# Ticket Reassignment

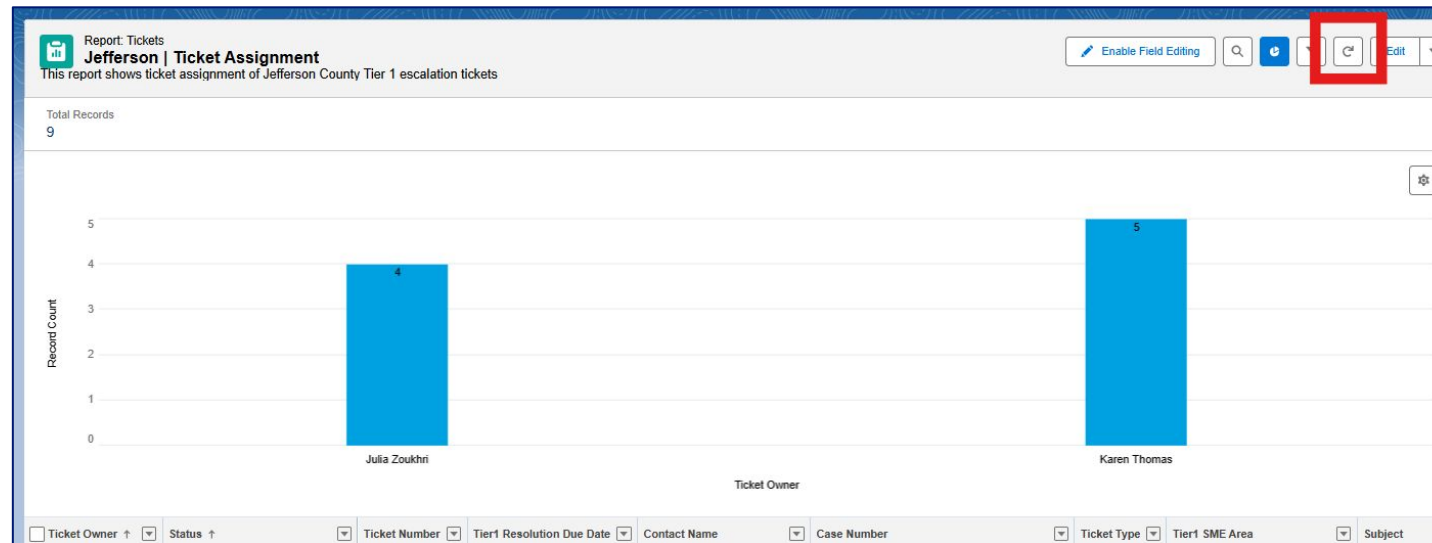
- A separate screen should appear titled “Change Ticket Owner”. The following steps should be taken to ensure that the ticket transfers ownership to another individual properly:
  - Ensure that the icon on the left side of the search bar shows a light blue box with a person’s profile inside
  - Type 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.

The screenshot shows a 'Change Ticket Owner' modal window. At the top, it says 'Change Ticket Owner'. Below that, there's a section titled '\* Select New Owner' with a search bar containing 'Search Users...'. To the left of the search bar is a person icon. Below the search bar is a checkbox labeled 'Send notification email', which is checked. Underneath, there's a warning: 'The new owner will also become the owner of these records related to 04051861 that are owned by you.' Below this warning are two bullet points: 'Notes and attachments' and 'Open activities'. At the bottom right, there are 'Cancel' and 'Submit' buttons. The 'Submit' button is highlighted with a red box. The background shows a blurred view of a Salesforce record page with various fields and a table of ticket status histories.

# 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](mailto: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](mailto:HCPF_PCA_Strategy@state.co.us)

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