

Medical Services Board Rule Repeal Presentation

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Office of Community Living

February 13, 2026

Purpose of the Rule Repeal

- Remove outdated guidance in Section 8.7202.B.
- Case Managers are no longer required to complete Comprehensive Life Reviews.

Impact & Summary

- The repeal of this portion in 8.7202 will clarify Case Manager expectations.
- This rule repeal will not have any negative impact on day-to-day case management functions, nor fiscal impacts.
- Stakeholder engagement with Case Management Agencies was completed on July 8, 2025 with no concerns from stakeholders.

Old v. New Rule Comparison and Examples

Category	Former Rule (8.7202.B)	New Rule 8.7202.B.8
Rule Placement / Authority	Comprehensive Life Review located in Intake, Screening and Referral in section 8.7202.B	Section 8.7202.B (8, 9, 10, 11) have been repealed.
Updating Language & Terminology	Section 8.7202.B (8, 9, 10, 11) have been repealed. Preview on next slide.	8.7202.B.8 (formerly point 12) now only contains “The Case Manager shall make Referrals to the Regional Centers when individuals with intellectual and/or developmental disabilities cannot be safely served in a community setting and shall comply with the Regional Centers admission policy.”

Rule Repeal Preview

8.7200 Case Management Agency Requirements

8.7202 Functions of A Case Management Agency

8.7202.B Intake, Screening, and Referral

~~8. — When a person needs assistance with challenging behavior, including behavior that presents a danger to self, or others, or behavior which results in significant property destruction, the Provider Agency in conjunction with the individual, their Guardian or other Legally Authorized Representative, and other members of Member Identified Team, as appropriate including the Member's appointed Case Manager shall complete a Comprehensive Review of the Person's Life Situation including:~~

- ~~a. — The status of friendships, the degree to which the person has access to the community, and the person's satisfaction with his or her current job or housing situation;~~
- ~~b. — The status of the Family ties and involvement, the person's satisfaction with roommates or staff and other providers, and the person's level of freedom and opportunity to make and carry out decisions;~~
- ~~c. — A review of the person's sense of belonging to any groups, organizations or programs for which they may have an interest, a review of the person's sense of personal security, and a review of the person's feeling of self respect;~~
- ~~d. — A review of other issues in the person's current life situation such as staff turnover, long travel times, relationship difficulties and immediate life Crises, which may be negatively affecting the person;~~
- ~~e. — A review of the person's medical situation which may be contributing to the challenging behavior; and~~



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Rule Repeal Preview

~~f. — A review of the person's Individualized Plan and any Individual Service and Person-Centered Support Plans to see if the services being provided are meeting the individual's needs and are addressing the challenging behavior using positive approaches.~~

~~8.9. The Case Manager shall make Referrals to the Regional Centers when individuals with intellectual and/or developmental disabilities cannot be safely served in a community setting and shall comply with the Regional Centers admission policy.~~

~~10. If any aspects of this review suggests that the person's life situation could be or is adversely affecting his or her behavior, these circumstances shall be evaluated by the Member Identified Team, and specific actions necessary to address those issues shall be included in the Individualized Plan~~

~~and/or Individual Service and Person-Centered Support Plan, prior to the use of any Rights Modifications to manage the person's behavior.~~

~~11. Issues identified in this comprehensive review that cannot be addressed by the Member Identified Team as led by the individual or their Guardian or other Legally Authorized Representative should be documented in the Person-Centered Support Plan, and the Case Management Agency, or regional center administration should be notified of these issues and the present or potential effect they will have on the person involved.~~

~~12. The Case Management Agency shall make a Referral to the regional center if, in this review, these issues cannot be maintained safely in a community setting.~~