

Prior to Sending to the County
Escalation Specialist Checklist
Escalation Ticket #00000000

Step 1: Internal Check-List

Task	Details	Notes	Completed	Date/Time Completed
Chatter	Review any notes in Chatter			
"Related" Tab	Check this tab and review all emails and attachments <i>(do NOT send ticket to counties unless LOC is present, when applicable)</i>			
Citizen Details	View this section for all open tickets (parent/child tickets and duplicates)			
Description	Review the entire description and review for next steps			
Members State ID	Pull and run in CBMS - read the			

	notes & check to see where the case is housed			
Reporting Party	Review the reporting party (CMA, County, Member, Provider, etc...) to determine request for information (ROI)			
Priority Level	Determine priority level, ensure you are familiar with this as the service level agreement (SLA) is tied to this priority level			
Ticket Details	Make updates where appropriate; ticket owner, ticket details, root cause, etc... <i>(don't forget to save!)</i>			
Email	Begin drafting email (please make sure that you are sending from the HCPF_MemberComplaints@state.co.us shared inbox!)			
Email Template	Ensure you add and are using the appropriate email template based on the issue reported			
Smartsheet Resource	Check the Smartsheet resource to ensure you are addressing the email to the appropriate county contact and/or shared inbox			
Send to the County/External Party!	Once all is completed, you are good to send to the county/external party!			

Step 2: CBMS

Task	Details	Notes	Completed	Date Completed
Companion cases	When searching for the member you should check for companion cases and determine which case the member was/is most recently active or applied for benefits on.			
Med Spans	Verify which HLPG the member is currently receiving, and if that has changed in the last 6 months.			
DOB	Check to make sure that the member's DOB is correct.			
Case Individual	Check to make sure the member is not marked as "out of the home". If so, check the EBB to see when their status changed.			
Eligibility Determination (Wrap-Up)	Review for information on the reason why a member has lost benefits, or why their HLPG changed (ex: HCBS to MAGI)			
Correspondence	Review the communications that may have been sent to the member.			
VCL checklist	Review to determine if the member has outstanding verifications to turn			

	in.			
Case Comments	Review previous comments made by counties, eligibility sites, etc.			
Caseload	Determine which site currently holds the member's benefits case. You may have to look in history to determine when the member moved from one site to another site (to determine which site should receive the escalation)			
History (user matches the caseload)	It may be necessary to review history on any screen in CBMS to determine when a change was made, and the user (site) made the change.			
Authorized Representative	Review to see if the member has appointed any ARs at the county level.			

Step 3: CBMS: Program Specific

Task	Details	Notes	Completed	Date Completed
Long Term Care Programs (including LTSS)	Is the escalation ticket regarding any LTC programs? (HCBS)			

SSI/SSDI status	If the member is active SSI or SSDI, they are not required to obtain a disability determination from Arbor.			
Disability Determination	Review this screen to determine If the member has had an approved ARG application. If the member does have an approved ARG application, you need to check to see if the diary date is expired. If the member is pending a disability determination you should check to see when the packet was sent to the vendor (Arbor).			
Long Term Care Institution	Is the escalation ticket regarding any LTC institutions? (nursing facilities, assisted living facilities, etc)			
Trust screen	Is the escalation ticket regarding any trusts? (income and resource)			
Non-MAGI Programs	Is the escalation ticket regarding any Non-MAGI Programs? (QMB, SLMB, etc).			
Resource Summary	Is the escalation ticket regarding the member's resources in CBMS?			
Medicare Expense	Is the escalation ticket regarding Medicare expenses? (Medicare premiums, copays, etc).			

MAGI Programs	Is the escalation ticket regarding any MAGI Programs? (MAGI Children, MAGI Adult, etc)			
Annualized Income Summary	Is the escalation ticket regarding the member's income in CBMS?			
Provider Billing	Is the escalation ticket regarding provider billing issues?			
Eligibility Bridge Breaks/Issues	Is the escalation ticket regarding eligibility breaks/issues caused by Bridge?			

Step 3: County/Site Action

County/Site Action Required?	Required Actions	Due Date