

Department of Health Care Policy and Financing

Funding Request for the FY 2026-27 Budget Cycle

Request Title R-11 Resources to Support Client Services & Trust Determination

Dept. Approval By: Supplemental FY 2025-26
OSPB Approval By: Budget Amendment FY 2026-27
X Change Request FY 2026-27

Summary Information	Fund	FY 2025-26		FY 2026-27		FY 2027-28
		Initial Appropriation	Supplemental Request	Base Request	Change Request	Continuation
Total of All Line Items Impacted by Change Request	Total	\$168,597,958	\$0	\$171,739,550	\$700,172	\$707,567
	FTE	800.7	0.0	795.6	1.8	2.0
	GF	\$65,138,379	\$0	\$65,650,140	\$223,727	\$226,092
	CF	\$13,188,286	\$0	\$13,921,322	\$120,059	\$121,326
	RF	\$3,838,121	\$0	\$3,874,058	\$0	\$0
	FF	\$86,433,172	\$0	\$88,294,030	\$356,386	\$360,149

Line Item Information	Fund	FY 2025-26	FY 2026-27		FY 2027-28	
		Initial	Supplemental	Base Request	Change Request	Continuation
		Appropriation	Request			
	Total	\$76,602,942	\$0	\$78,913,644	\$159,343	\$173,199
	FTE	800.7	0.0	795.6	1.8	2.0
01. Executive Director's Office, (A) General Administration, (1)	GF	\$29,477,201	\$0	\$30,293,906	\$50,915	\$55,343
General Administration - Personal Services	CF	\$6,407,940	\$0	\$6,602,894	\$27,323	\$29,698
	RF	\$3,155,881	\$0	\$3,211,037	\$0	\$0
	FF	\$37,561,920	\$0	\$38,805,807	\$81,105	\$88,158
	Total	\$12,823,330	\$0	\$16,840,982	\$29,720	\$35,534
	FTE	0.0	0.0	0.0	0.0	0.0
01. Executive Director's Office, (A) General Administration, (1)	GF	\$5,434,254	\$0	\$6,493,890	\$9,496	\$11,355
General Administration - Health, Life, and Dental	CF	\$702,241	\$0	\$1,438,304	\$5,096	\$6,093
	RF	\$0	\$0	\$0	\$0	\$0
	FF	\$6,686,835	\$0	\$8,908,788	\$15,128	\$18,086
	Total	\$51,482	\$0	\$64,918	\$99	\$107
	FTE	0.0	0.0	0.0	0.0	0.0
01. Executive Director's Office, (A) General Administration, (1)	GF	\$23,801	\$0	\$25,314	\$32	\$35
General Administration - Short-term Disability	CF	\$427	\$0	\$5,360	\$17	\$18
	RF	\$0	\$0	\$0	\$0	\$0
	FF	\$27,254	\$0	\$34,244	\$50	\$54
	Total	\$377,655	\$0	\$417,668	\$635	\$689
	FTE	0.0	0.0	0.0	0.0	0.0
01. Executive Director's Office, (A) General Administration, (1)	GF	\$152,639	\$0	\$162,880	\$203	\$221
General Administration - Paid Family and Medical Leave Insurance	CF	\$27,098	\$0	\$34,480	\$109	\$118
	RF	\$0	\$0	\$0	\$0	\$0
	FF	\$197,918	\$0	\$220,308	\$323	\$350
	Total	\$7,918,630	\$0	\$9,281,509	\$14,091	\$15,316
	FTE	0.0	0.0	0.0	0.0	0.0
01. Executive Director's Office, (A) General Administration, (1)	GF	\$3,391,947	\$0	\$3,619,548	\$4,503	\$4,894
General Administration - Unfunded Liability AED Payments	CF	\$365,358	\$0	\$766,216	\$2,416	\$2,626
	RF	\$0	\$0	\$0	\$0	\$0
	FF	\$4,161,325	\$0	\$4,895,745	\$7,172	\$7,796

	Total	\$3,400,167	\$0	\$3,097,991	\$19,032	\$5,470
	FTE	0.0	0.0	0.0	0.0	0.0
01. Executive Director's Office, (A) General Administration, (1)	GF	\$1,344,473	\$0	\$1,287,723	\$6,082	\$1,748
General Administration - Operating Expenses	CF	\$296,462	\$0	\$257,147	\$3,263	\$938
	RF	\$50,071	\$0	\$30,852	\$0	\$0
	FF	\$1,709,161	\$0	\$1,522,269	\$9,687	\$2,784
	Total	\$3,700,205	\$0	\$3,700,205	\$9,300	\$9,300
	FTE	0.0	0.0	0.0	0.0	0.0
01. Executive Director's Office, (A) General Administration, (1)	GF	\$1,482,562	\$0	\$1,482,562	\$2,972	\$2,972
General Administration - Leased Space	CF	\$322,276	\$0	\$322,276	\$1,595	\$1,595
	RF	\$38,849	\$0	\$38,849	\$0	\$0
	FF	\$1,856,518	\$0	\$1,856,518	\$4,733	\$4,733
	Total	\$17,787,189	\$0	\$19,025,164	\$125,952	\$125,952
	FTE	0.0	0.0	0.0	0.0	0.0
01. Executive Director's Office, (A) General Administration, (1)	GF	\$7,168,016	\$0	\$7,576,548	\$40,245	\$40,245
General Administration - Payments to OIT	CF	\$1,437,336	\$0	\$1,647,792	\$21,597	\$21,597
	RF	\$512,320	\$0	\$512,320	\$0	\$0
	FF	\$8,669,517	\$0	\$9,288,504	\$64,110	\$64,110
	Total	\$45,936,358	\$0	\$40,397,469	\$342,000	\$342,000
	FTE	0.0	0.0	0.0	0.0	0.0
01. Executive Director's Office, (A) General Administration, (1)	GF	\$16,663,486	\$0	\$14,707,769	\$109,279	\$109,279
General Administration - General Professional Services and Special Projects	CF	\$3,629,148	\$0	\$2,846,853	\$58,643	\$58,643
	RF	\$81,000	\$0	\$81,000	\$0	\$0
	FF	\$25,562,724	\$0	\$22,761,847	\$174,078	\$174,078

Auxiliary Data			
Requires Legislation?	NO		
Type of Request?	Health Care Policy and Financing Prioritized Request	Interagency Approval or Related Schedule 13s:	No Other Agency Impact



Department Priority: R-11 Resources to Support Client Services & Trust Determinations

Summary of Funding Change for FY 2026-27

Fund Type	FY 2026-27 Base Request	FY 2026-27 Incremental Request	FY 2027-28 Incremental Request
Total Funds	\$171,739,550	\$700,172	\$707,567
General Fund	\$65,650,140	\$223,727	\$226,092
Cash Funds	\$13,921,322	\$120,059	\$121,326
Reappropriated Funds	\$3,874,058	\$0	\$0
Federal Funds	\$88,294,030	\$356,386	\$360,149
FTE	795.6	1.8	2.0

Summary of Request

Problem or Opportunity

The Department is experiencing increasing demand in Client Services operations for Salesforce and System Operations Support. In addition, the Eligibility Trust Determinations Access tracking was converted and modernized to the Salesforce environment without an increase in user Salesforce support licenses, data storage, and staff to maintain and support the modernized Salesforce systems.

Proposed Solution

The Department proposes adding more Salesforce licenses, data storage, and staff to manage system changes, contracts, and operational demands for the Salesforce and Five9 systems, and for the Salesforce Trust system modernization management. This request will directly support system administration, improve system reliability, improve member communication, provide access to member files, and expedite eligibility trust review with an automated system.

Fiscal Impact of Solution

The Department requests \$700,171 total funds, including \$223,725 in General Fund and 1.8 FTE in FY 2026-27 and \$707,563 total funds, including \$226,088 in General Fund and 2.0 FTE in FY 2027-28 and \$342,000 in contractor resources ongoing to manage the increased administrative burden resulting from Salesforce system usage increase.

Requires Legislation	Colorado for All Impacts	Revenue Impacts	Impacts Another Department?	Statutory Authority
No	Positive	No	No	25.5-1-104 (3), C.R.S. 15-14-412.6 (2), C.R.S.

Background and Opportunity

Salesforce is a cloud-based system that allows governments to collaborate, connect, and engage by collecting constituent information to communicate more quickly and efficiently. It is best known for its Customer Relationship Management (CRM) platform. Salesforce allows integration connectors for internal and external systems, customizable platforms, and easy integration with business applications.

The Department has been using Salesforce since 2012 with the passage of the Affordable Care Act (ACA) and its resulting healthcare reform. The Department saw an increase in the number of people eligible for Medicaid, and only 10 agents to manage the phone calls, emails, and inquiries about the Department's portfolio of services for its members statewide, all managed within an Access database. The Department has received funding to implement improvements to the contact center. After comparing current versus automated capabilities, the Department determined that migrating the contact center to the cloud CMR solution would provide agents with the modern digital tools necessary to increase service capacity.

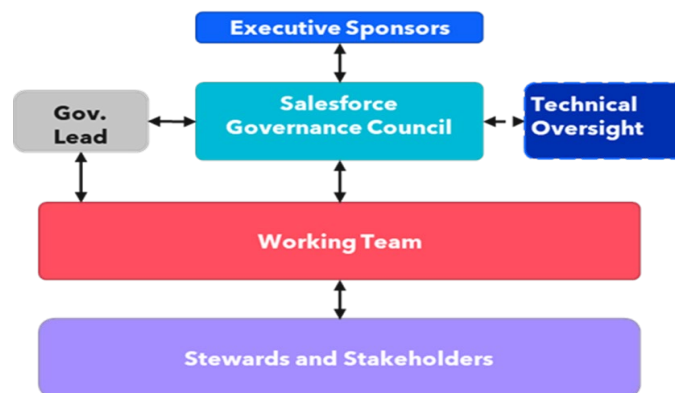
In 2018 the Department modernized the Colorado Benefit Management System (CBMS) system to Salesforce to provide faster service to members in need of food, cash and medical assistance. Salesforce is now used to determine an individual's eligibility and allow the Department to respond to members requests in a timely manner. Additionally, the Department deployed Salesforce Analytics to automate reporting and gain a deeper understanding of the CBMS data and performance and both the state and county levels.

Salesforce is now being utilized as the member relationship management system in the Healthy Communities program ([Force.com](https://www.force.com)) to facilitate work of the Federally Qualified Health Centers (FHCs) and provide a centralized system for data exchange and reporting. Salesforce is also being utilized for the Quality-of-Care Grievance (QOCG), reporting to track complaints on covered services received where the quality of care provided by the health care provider does not meet professionally recognized standards of health care. In addition, the redesigned Case Management infrastructure was transitioned to Salesforce so that the process for addressing Medicaid members' needs has a stronger alignment with the Member Contract Center (MCC) design of ticketing in Salesforce.

The Department has now rolled out Salesforce to more county users and launched a new eligibility trust determination application to enable staff and county agents to deliver better and faster service, open up new service channels, and provide the Department as a whole a single platform that connects Medicaid members, local governments, and community partners through a centralized eligibility trust system and CCM system.

The Department developed the Salesforce organization governance structure to better promote a culture of transparency and buy-in by documenting and sharing key policies and procedures, establishing a consistent prioritization framework, and to encourage feedback and knowledge sharing across the organization.

Figure 1: Salesforce Governance Structure



Salesforce has proved to be a successful and reliable one-stop cloud solution for the Department CRM system. As more programs are moved to the Salesforce environment, additional county users and providers access the system, and more centralized documentation warehousing is provided, the Department has identified a need for additional support staff, licenses, and data storage to accommodate the Salesforce CRM solutions.

Client Services Operations

The Client Services Operations team supports the Salesforce and Five9 operations for the Department, which includes the Contact Center Telephony systems for the member contact center, Program and Eligibility Application Kit (PEAK) help desk, and the Colorado Medical Assistance Program (CMAP) help desk. The Five9 software integrates with Salesforce, enabling agents to effortlessly log into the native Customer Relationship Management (CRM) environment to manage all customer interactions. The CRM is the strategy and technology that is used primarily by the Contact Center agents in the Department to manage and analyze customer interactions and data throughout the customer lifecycle. The CRM is utilized by staff outside of the Contact Center and includes Member Relationship Management (MRM), Appeals, Benefits Management, County Relations, Cost Control and Quality Improvement (CCQI), and others. County and state partners and contractors also utilized the CRM in their day-to-day operations.

In addition, the Department is preparing to scale from 250 to 450 users across key platforms including Salesforce and Five9 in reaction to the approved County Relations budget. This

expansion, combined with current workload demands, requires immediate investment in additional technical staff to maintain service quality, address growing system complexity, and ensure operational resilience. To date, the Department has relied on contracted Salesforce developers and/or vendors such as Slalom to meet workload overflow, highlighting the internal resource gap and the unsustainability of contractor dependence over time.

Since the fall of 2023, the use of Salesforce and Five9 in the Department has rapidly increased outside of the Member Contact Center with providers, members and staff as more programs and functionality are integrated into the system. The Client Services Division (CSD) Salesforce team uses “heat tickets” to track technical support (system issues, password resets, etc.) needed or change requests (updates to functionality) in order to prioritize workloads to streamline operations. The volume of heat tickets has increased dramatically as new projects are released and/or incorporated into the Salesforce environment, referring to Table 1. These projects include adding the Housing application management solution, the LTSS presumptive eligibility module, and the Appeals letters document creation tool.

Table 1: Salesforce Heat Tickets Closed

Heat Ticket Type	FY 2023-24	FY 2024-25
CBMS Data Pulls	31	54
Multi-Factor Authentication	22	7
Password Reset	28	35
Performance Degradation	11	2
Salesforce General Issues	63	74
Other	30	17
Total	185	189

In FY25 with 250 users, the Department resolved 189 technical tickets and 18 project-related tickets. Scaling to 450 users, it is projected to generate 653 Heat Tickets annually, based on a common productivity benchmark (150 tickets per system admin/year), supporting the need for dedicated contract dollars for Salesforce Heat Tickets support alone. Two program support contractors were calculated at a rate of \$40/hour for 2000 hours annually ongoing.

There are currently two staff that support 258 Salesforce users and 95 Five9 users. A detailed workload report (Nov 1, 2024, to June 30, 2025) confirms that the two current system administrators logged a combined 857.75 hours over 8 months across all systems, which annualizes the support workload for current users at 1,287 hours/year. Scaling this to 450 users yields 2,316 hours/year of support needed. At an industry standard of 1,500 hours per FTE annually, the Department will require approximately 1.8 FTE to manage system-wide operational support workload.

Based on current Salesforce system modification requests, there are 363 Heat Tickets pending (Table 2) and the increased volume of users, current staff cannot support any other additional services to users. Growing demands and workload increases of the CCM content center’s staff have resulted in the need for temporary staff and referrals to vendors for member support as an interim solution. At the time of the original request, FY 2023-24 R-13, “Case Management

Redesign,” staff was able to utilize Home & Community Based Services (HCBS) American Rescue Plan Act (ARPA) funding to temporarily offset the General Fund costs related to CCM operations. The Department no longer has access to HCBS funds, and the FY 2025-26 R-08, “County Administration and CBMS Enhancements,” only addressed county staffing needs and did not include the ongoing need for the Department’s operations staff. The Department has been unsuccessful in absorbing the ongoing costs within its existing budget.

Table 2: Salesforce Heat Tickets Backlog

Heat Ticket Type	FY 2023-24	FY 2024-25
General Backlog	191	227
Projects	101	94
Special Projects	2	23
Other	0	19
Total	294	363

Eligibility Trust Determinations

Health First Colorado members or applicants can establish a trust as a legal arrangement where assets are transferred by the settler with the intention that it is administered, held and managed by a trustee for the benefit of a beneficiary. The applicant or member shall submit trust documents and records to the Department in accordance with rule.¹

The Department is responsible for reviewing and managing any trust (income, disability, and pooled) established by a Health First Colorado member or applicant. In 2003, the staff reviewed and processed approximately 705 new income trusts, and it is estimated that there are at least 5,000 active income trusts requiring monitoring for compliance. The Department currently leverages Smartsheet and a Microsoft Access database as the solutions for trust management and manual operations for member correspondence on eligibility trust determinations and those that are processed through legal escalations. The current process requires software-specific customizations to complete its daily operations and has become inefficient, lacking sufficient data storage to allow users (counties and Department staff) to attach documents and information into the Salesforce and trust environment.

Communication between relevant parties is manual and reliant on the postal service, fax machines and/or hand-to-hand delivery which result in higher breach of member sensitive Personal Identifying Information (PII) data.

The Department has recently automated the trust process within the Salesforce environment including allowing the system to follow up with the user on any pending approvals related to level of care, disability, trusts, etc., and providing more individualized member correspondence regarding verifications and eligibility trust determinations. The Department is currently capped within our existing budget to 300 Salesforce licenses/portal logins, and 40.0GB in data storage, thus limiting the accessibility of cross-agency trust reviews, document

¹ 10 CCR 2505-10 Section 8.100.7.E.7

attachment capabilities, and expedited and efficient resolutions of eligibility trust determinations.

Proposed Solution and Anticipated Outcomes

The Department requests \$700,171 total funds, including \$223,725 in General Fund and 1.8 FTE in FY 2026-27 and \$707,563 total funds, including \$226,088 in General Fund and 2.0 FTE in FY 2027-28, and \$342,000 in contractor resources ongoing to manage the increased administrative burden resulting from additional users accessing the Salesforce system, increased heat tickets requiring system maintenance and programming, and increase data storage capability for records retention.

The Department anticipates that approval of the request would provide resources to obtain efficiencies and cost savings in accessing Salesforce, contract management of system improvements, and member trust management. Staffing allows for better retention of institutional knowledge and subject matter expertise. These positions will provide standardized customer experience for members and greater accessibility for cross-agency agents. If this request is not funded, there will be increased delays in contact center call support and volume, potential Salesforce system degradation as enhancements are delayed, and members potentially becoming Medicaid ineligible due to income trust limitations.

The CRM Models do not conflict but represent complementary dimensions of demand: one by service volume (tickets), the other by time investment (hours). Together, they make a clear case that without dedicated internal staffing, the Department is at risk of growing backlog and system instability, burnout of current staff, heightened long-term costs from contractor reliance, and delays in responding to frontline needs and regulatory mandates.

Client Services Operations

The Department is requesting 2.0 FTE (1.8 FTE prorated in FY 2026-27) staff members with a primary focus on Salesforce support, while ensuring these roles can flexibly contribute to Five9 systems and case management operations. This investment will scale system support proportionally with user growth, eliminate reliance on costly contract developers, preserve institutional knowledge and technical continuity, and strengthen the Department's responsiveness and reliability in operations.

The Department is requesting the following positions:

Salesforce Administrator - 1.0 FTE at the Data Management IV Administrator V level will support the Governance structures within the system, specifically when it comes to groups using the system to track complaints/grievances. This position is critical for user groups within the Salesforce organization as it continues to expand, and other program areas request additional work for the system. This position ensures software configurations are implemented as needed and cross coordination of structural implementation.

Salesforce Project Coordinator - 1.0 FTE at the Project Coordinator I level will track heat tickets and workflows to provide more efficient and higher levels of follow-up on requests. The position will also provide business analysis for all projects the team undertakes, dashboard reporting, and stakeholder coordination.

Contractor Resources - \$160,000 annually for two Program Assistants to support all functions of the Operations team as needed and to provide administrative day-to-day support by attending meetings, monitoring contact center performance, and dashboard reporting as required.

During the soft launch, contractors assisted the CCM by providing guidance and administration of the CCM contact center. The management of those duties have now transitioned to the Department without resources to support the increase in deskside support and telephone systems. Salesforce is used as a centralized case management and communication tool that requires dedicated technical and operational support. The Salesforce system is critical to the departmental operations as more users rely on the system for their day-to-day work. By bolstering administrative staff, the team will improve communications, resolve Heat Tickets, provide training, and updates for end users. Staff will contribute to proactive problem identification and prevention, more thorough auditing and reporting, and achieve balanced workloads thereby reducing operational costs in staff attrition. In addition, having staff on board will provide continuity in process system improvements and maintain knowledge of prior, current and future needs of the Salesforce system for CCM reliability.

Staff members are also participating in the contact center community of practice established by the Governor's office to align statewide contact center best practices. The request would support the continued involvement as the practices continue towards the new Average Speed to Answer (ASA) targets.

Eligibility Trust Determinations

The Department is seeking to leverage the existing Salesforce environment as the centralized system that will become the modernized solution to manage eligibility trusts. Migrating the Trust business process to Salesforce will enable advanced automated features for case management and will increase efficiency, provide one source of document management, and allow all cross-agency users to access the system as required for eligibility trust determinations and member correspondence. Written communications for all active income trusts must be completed to inform members and trustees of the required trust balance and monthly required deposit amount for that year.

Migrating the business process will enable advanced automated features for trust management that will increase efficiency for users and staff. This migration will protect sensitive PII data which is crucial to the program goals of identifying and mitigating legal risk and improving member communication. Migration also established an extensible tool that expands functionality for features like digital experience sites for the intake of trusts, reporting features, and integration with other systems (i.e. CBMS).

In order to successfully migrate the system, the Department is requesting to buy additional Salesforce licenses, portal logins, and data storage to enable current and future staff to increase efficiency, cross-agency coordination, and improve outcomes for members. The Department is also requesting \$182,000 annually for a Trust Compliance Attorney to issue communications to members who require income trusts for eligibility members. This position would be responsible for auditing trust records to ensure trusts are properly funded and financially eligible for medical assistance benefits.

Currently CBMS does not have the capability to generate these communications automatically and it would be several years of program development before the CBMS system could perform this action. In 2024, there were over 705 new income trusts, and at least 5,000 active income trusts that required monitoring, compliance review, and communication to the trustee. Existing staff can review 1,200 trusts (which include disabilities and pooled trusts) annually and cannot fully complete the additional communications for income trusts without additional resources.

Providing additional resources increases timely resolution of eligibility trust determinations and legal escalations, ensures county portal log-in access for trust reviews, and ensures the Salesforce platform has sufficient data storage to allow users to attach documents and information to Salesforce tickets.

Supporting Evidence and Evidence Designation

The Department assumes that Evidence Designation is not applicable to this request because the request does not meet the statutory definition for a program or practice. To be considered a program or practice, the request must meet the specific outcomes, a target population, and defined and replicable elements. This request is only asking for FTE to manage the changes in the Salesforce system, licenses, and data storage, and is strictly administrative.

Salesforce has been proven to increase staff efficiency and timely resolution of escalations. Implementing this automation will provide members the determinations faster and provide a centralized data warehouse of portfolios for cross-agency coordination.

Promoting Colorado for All

Client Services Operations

Client Services Operations request is expected to have a positive impact on Medicaid members by providing operational excellence and customer service in the Salesforce environment. It will enable members, community partners, and staff to access community portal information and specific system areas, and to request updates and changes in data thereby obtaining live status updates for more effective communication between parties. This request aligns with the Governor's goal of Access to Healthcare by providing the solutions that all partners can access. The request aligns with the Department's goal of Automate Member Coverage Renewals -

Member Communication by enhancing the accessibility and communication of system changes and partner needs.

Eligibility Trust Determinations

Eligibility Trust Determination's request is expected to have a positive impact as it aligns with the governor's priority of Keeping Coloradans Covered and Saving People Money on Healthcare by providing timely trust reviews and processing of Medicaid applications. It will enable members, community partners, and staff to access community portal information and specific system areas, and to request updates and changes in data thereby obtaining live status updates for more effective communication between parties.

Assumptions and Calculations

In order to determine the number of FTE for the Client Services Operations team, the Department reviewed current staffing in similar operations, current temporary positions, contractors, the anticipated growth of the program, and the Community of Practice targets to determine that 1.8 FTE and \$160,000 in contractor resources would be needed to manage the Salesforce system and provide deskside support. Staff calculated the FTE based on a common productivity benchmark of 150 tickets per system administrator per year. The positions are assumed at minimum of the range and eligible for 50% federal participation, 6.63% from Hospital Affordability & Sustainability cash fund, and 43.37% from the General Fund. The contractor was calculated at \$40/hours for 2000 annually based on State Price Agreements.

The Eligibility Trust Determinations resources were estimated by the number of Salesforce licenses, portal logins, and data storage needed to provide minimum access to records for member determinations. The Trust Compliance Attorney is estimated at 1040 hours at \$175/hour based on current Department of Law Attorney rates.

The Department determined that the staff and contractors would be eligible for 50% federal participation, and the state portion would be 33% from the General Fund and 17% from the Hospital Affordability & Sustainability Fee Cash Fund.

Salesforce Licenses assumes 40 users at \$2,532 per user and 4 units of 10GB of data storage at \$6,167.64 for each unit based on current Salesforce quotes and access requirements.

R-11 Resources to Support Client Services & Trust Determinations
Appendix A: Assumptions and Calculations

Table 1.1 Summary by Line Item FY 2026-27									
Row	Line Item	Total Funds	FTE	General Fund	Cash Funds	Reappropriated Funds	Federal Funds	FFP Rate	Notes/Calculations
A	(1) Executive Director's Office; (A) Administration, Personal Services	\$159,343	1.8	\$50,915	\$27,323	\$0	\$81,105	50.90%	Table 2.1 Row A
B	(1) Executive Director's Office; (A) Administration, Health, Life, Dental	\$29,720	0.0	\$9,496	\$5,096	\$0	\$15,128	50.90%	Table 2.1 Row A
C	(1) Executive Director's Office; (A) Administration, Short Term Disability	\$99	0.0	\$32	\$17	\$0	\$50	50.51%	Table 2.1 Row A
D	(1) Executive Director's Office; (A) Administration, Unfunded Liability AED Payments	\$14,091	0.0	\$4,503	\$2,416	\$0	\$7,172	50.90%	Table 2.1 Row A
E	(1) Executive Director's Office; (A) Administration, Paid Family and Medical Leave Insurance	\$635	0.0	\$203	\$109	\$0	\$323	50.87%	Table 2.1 Row A
F	(1) Executive Director's Office; (A) Administration, Operating Expenses	\$19,032	0.0	\$6,082	\$3,263	\$0	\$9,687	50.90%	Table 2.1 Row A
G	(1) Executive Director's Office; (A) Administration, Leased Space	\$9,300	0.0	\$2,972	\$1,595	\$0	\$4,733	50.89%	Table 2.1 Row B
H	(1) Executive Director's Office; (A) Administration, Payments to OIT	\$125,952	0.0	\$40,245	\$21,597	\$0	\$64,110	50.90%	Table 2.1 Row A
I	(1) Executive Director's Office; (A) Administration, General Professional Services and Special Projects	\$342,000	0.0	\$109,279	\$58,643	\$0	\$174,078	50.90%	Table 2.1 Row C
J	Total Request	\$700,172	1.8	\$223,727	\$120,059	\$0	\$356,386		Sum of Rows A through I

R-11 Resources to Support Client Services & Trust Determinations
Appendix A: Assumptions and Calculations

Table 1.2 Summary by Line Item FY 2027-28									
Row	Line Item	Total Funds	FTE	General Fund	Cash Funds	Reappropriated Funds	Federal Funds	FFP Rate	Notes/Calculations
A	(1) Executive Director's Office; (A) Administration, Personal Services	\$173,199	2.0	\$55,343	\$29,698	\$0	\$88,158	50.90%	Table 2.2 Row A
B	(1) Executive Director's Office; (A) Administration, Health, Life, Dental	\$35,534	0.0	\$11,355	\$6,093	\$0	\$18,086	50.90%	Table 2.2 Row A
C	(1) Executive Director's Office; (A) Administration, Short Term Disability	\$107	0.0	\$35	\$18	\$0	\$54	50.47%	Table 2.2 Row A
D	(1) Executive Director's Office; (A) Administration, Unfunded Liability AED Payments	\$15,316	0.0	\$4,894	\$2,626	\$0	\$7,796	50.90%	Table 2.2 Row A
E	(1) Executive Director's Office; (A) Administration, Paid Family and Medical Leave Insurance	\$689	0.0	\$221	\$118	\$0	\$350	50.80%	Table 2.2 Row A
F	(1) Executive Director's Office; (A) Administration, Operating Expenses	\$5,470	0.0	\$1,748	\$938	\$0	\$2,784	50.90%	Table 2.2 Row A
G	(1) Executive Director's Office; (A) Administration, Leased Space	\$9,300	0.0	\$2,972	\$1,595	\$0	\$4,733	50.89%	Table 2.2 Row B
H	(1) Executive Director's Office; (A) Administration, Payments to OIT	\$125,952	0.0	\$40,245	\$21,597	\$0	\$64,110	50.90%	Table 2.2 Row A
I	(1) Executive Director's Office; (A) Administration, General Professional Services and Special Projects	\$342,000	0.0	\$109,279	\$58,643	\$0	\$174,078	50.90%	Table 2.2 Row C
J	Total Request	\$707,567	2.0	\$226,092	\$121,326	\$0	\$360,149		Sum of Rows A through I

R-11 Resources to Support Client Services & Trust Determinations
Appendix A: Assumptions and Calculations

Table 1.3 Summary by Line Item FY 2028-29 and Ongoing									
Row	Line Item	Total Funds	FTE	General Fund	Cash Funds	Reappropriated Funds	Federal Funds	FFP Rate	Notes/Calculations
A	(1) Executive Director's Office; (A) Administration, Personal Services	\$173,199	2.0	\$55,343	\$29,698	\$0	\$88,158	50.90%	Table 2.3 Row A
B	(1) Executive Director's Office; (A) Administration, Health, Life, Dental	\$35,534	0.0	\$11,355	\$6,093	\$0	\$18,086	50.90%	Table 2.3 Row A
C	(1) Executive Director's Office; (A) Administration, Short Term Disability	\$107	0.0	\$35	\$18	\$0	\$54	50.47%	Table 2.3 Row A
D	(1) Executive Director's Office; (A) Administration, Unfunded Liability AED Payments	\$15,316	0.0	\$4,894	\$2,626	\$0	\$7,796	50.90%	Table 2.3 Row A
E	(1) Executive Director's Office; (A) Administration, Paid Family and Medical Leave Insurance	\$689	0.0	\$221	\$118	\$0	\$350	50.80%	Table 2.3 Row A
F	(1) Executive Director's Office; (A) Administration, Operating Expenses	\$5,470	0.0	\$1,748	\$938	\$0	\$2,784	50.90%	Table 2.3 Row A
G	(1) Executive Director's Office; (A) Administration, Leased Space	\$9,300	0.0	\$2,972	\$1,595	\$0	\$4,733	50.89%	Table 2.3 Row B
H	(1) Executive Director's Office; (A) Administration, Payments to OIT	\$125,952	0.0	\$40,245	\$21,597	\$0	\$64,110	50.90%	Table 2.3 Row A
I	(1) Executive Director's Office; (A) Administration, General Professional Services and Special Projects	\$342,000	0.0	\$109,279	\$58,643	\$0	\$174,078	50.90%	Table 2.3 Row C
J	Total Request	\$707,567	2.0	\$226,092	\$121,326	\$0	\$360,149		Sum of Rows A through I

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Table 2.1 Summary by Initiative FY 2026-27									
Row	Item	Total Funds	FTE	General Fund	Cash Funds	Reappropriate d Funds	Federal Funds	FFP Rate	Notes/Calculations
A	Salesforce Staffing	\$232,220	1.8	\$74,203	\$39,819	\$0	\$118,198	50.90%	Table 5
B	Salesforce Licenses	\$125,952	0.0	\$40,245	\$21,597	\$0	\$64,110	50.90%	Table 4.2 Row C
C	Contractor Resources	\$342,000	0.0	\$109,279	\$58,643	\$0	\$174,078	50.90%	Table 3.2 Row B
D	Total Request	\$700,172	1.8	\$223,727	\$120,059	\$0	\$356,386	50.00%	Sum of Rows A through C
Table 2.2 Summary by Initiative FY 2027-28									
Row	Item	Total Funds	FTE	General Fund	Cash Funds	Reappropriate d Funds	Federal Funds	FFP Rate	Notes/Calculations
A	Salesforce Staffing	\$239,615	2.0	\$76,568	\$41,086	\$0	\$121,961	50.00%	Table 5
B	Salesforce Licenses	\$125,952	0.0	\$40,245	\$21,597	\$0	\$64,110	50.00%	Table 4.2 Row C
C	Contractor Resources	\$342,000	0.0	\$109,279	\$58,643	\$0	\$174,078	50.00%	Table 3.2 Row B
D	Total Request	\$707,567	2.0	\$226,092	\$121,326	\$0	\$360,149	50.00%	Sum of Rows A through C
Table 2.3 Summary by Initiative FY 2028-29 and Ongoing									
Row	Item	Total Funds	FTE	General Fund	Cash Funds	Reappropriate d Funds	Federal Funds	FFP Rate	Notes/Calculations
A	Salesforce Staffing	\$239,615	2.0	\$76,568	\$41,086	\$0	\$121,961	50.00%	Table 5
B	Salesforce Licenses	\$125,952	0.0	\$40,245	\$21,597	\$0	\$64,110	50.00%	Table 4.2 Row C
C	Contractor Resources	\$342,000	0.0	\$109,279	\$58,643	\$0	\$174,078	50.00%	Table 3.2 Row B
D	Total Request	\$707,567	2.0	\$226,092	\$121,326	\$0	\$360,149	N/A	Sum of Rows A through C

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Table 3.1 Contractor Resources					
Row	Item	Rate	Hours	FY 2026-27 and Ongoing	Notes
A	Trust Compliance Attorney	\$175.00	1,040	\$182,000	TRB Common Policy
B	Program Assistance	\$40.00	4,000	\$160,000	Salesforce Support
C	Total			\$342,000	Sum of Row A + Row B

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Table 4.1 Salesforce Licenses & Data Storage					
Row	Item	Rate	Quantity	FY 2026-27 and Ongoing	Notes
A	Salesforce Licenses	\$2,532.00	40	\$101,280	Actual Costs from OIT
B	Salesforce Data Storage	\$6,167.64	4	\$24,672	10GB Storage Units
C	Total			\$125,952	Sum of Row A + Row B

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Table 5 Salesforce FTE Calculations										
Personal Services										
Position Classification	FTE	Start Month	End Month (if Applicable)	FY 2025-26	FY 2026-27	FY 2027-28	FY 2028-29	FY 2029-30	FY 2030-31	Notes
PROGRAM ASSISTANT II	0.0	Jul 2026	N/A	\$0	\$0	\$0	\$0	\$0	\$0	
DATA MANAGEMENT V	1.0	Jul 2026	N/A	\$0	\$96,888	\$105,313	\$105,313	\$105,313	\$105,313	
PROJECT COORDINATOR	1.0	Jul 2026	N/A	\$0	\$62,455	\$67,886	\$67,886	\$67,886	\$67,886	
PROGRAM ASSISTANT II	0.0	Jul 2026	N/A	\$0	\$0	\$0	\$0	\$0	\$0	
Total Personal Services (Salary, PERA, FICA)	2.0			\$0	\$159,343	\$173,199	\$173,199	\$173,199	\$173,199	
Centrally Appropriated Costs										
Cost Center	FTE	FTE	Cost or Percentage	FY 2025-26	FY 2026-27	FY 2027-28	FY 2028-29	FY 2029-30	FY 2030-31	Notes
Health, Life, and Dental	0.0	0.0	Varies	\$0	\$29,720	\$35,534	\$35,534	\$35,534	\$35,534	
Short-term Disability	-	-	0.07%	\$0	\$99	\$107	\$107	\$107	\$107	
Paid Family and Medical Leave Insurance	-	-	0.45%	\$0	\$635	\$689	\$689	\$689	\$689	
Unfunded Liability AED Payments	-	-	10.00%	\$0	\$14,091	\$15,316	\$15,316	\$15,316	\$15,316	
Centrally Appropriated Costs Total				\$0	\$44,545	\$51,646	\$51,646	\$51,646	\$51,646	
Operating Expenses										
Ongoing Costs	FTE	FTE	Cost	FY 2025-26	FY 2026-27	FY 2027-28	FY 2028-29	FY 2029-30	FY 2030-31	Notes
Standard Allowance	0.0	0.0	\$500	\$0	\$920	\$1,000	\$1,000	\$1,000	\$1,000	
Communications	0.0	0.0	\$235	\$0	\$432	\$470	\$470	\$470	\$470	
Salesforce Licenses	0.0	0.0	\$2,000	\$0	\$3,680	\$4,000	\$4,000	\$4,000	\$4,000	
Subtotal				\$0	\$5,032	\$5,470	\$5,470	\$5,470	\$5,470	
Column1	Column2	Column3	Column4	Column5	Column6	Column7	Column8	Column9	Column10	Notes
One-Time Costs (Capital Outlay)	FTE		Cost	FY 2025-26	FY 2026-27	FY 2027-28	FY 2028-29	FY 2029-30	FY 2030-31	
Cubicle	2.0		\$5,000	\$0	\$10,000	\$0	\$0	\$0	\$0	
PC	2.0		\$2,000	\$0	\$4,000	\$0	\$0	\$0	\$0	
Other	0.0		\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Subtotal				\$0	\$14,000	\$0	\$0	\$0	\$0	
Total Operating				\$0	\$19,032	\$5,470	\$5,470	\$5,470	\$5,470	
Leased Space										
	FTE	FTE	Cost	FY 2025-26	FY 2026-27	FY 2027-28	FY 2028-29	FY 2029-30	FY 2030-31	Notes
Leased Space	0.0	0.0	\$4,650	\$0	\$9,300	\$9,300	\$9,300	\$9,300	\$9,300	

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Table 6.1 FTE Description			
Working Title	Position Classification	FTE	Description
Salesforce Administrator	Data Management V	1.0	This position is critical and the staff authority over both Salesforce and Five9 systems. The position leads all development and implementations of varying work and projects to expand, to include management and maintenance of the system. This position will support the Governance structures within the system, specifically when it comes to groups using the system to track complaints/grievances. Position will be responsible for current and future Accessibility testing and remediation for both systems related to HB21-1110.
Salesforce Project Coordinator	Project Coordinator II	1.0	This position is a contract and project coordinator for the Member Contact Center and will identify opportunities to improve customer services. Position researches, evaluates and recommends contracting best practices to maximize program and contractor performance. Responds to stakeholder concerns via meetings, emails, phone contact and provides ad hoc information as required. Maintains formal contract administration files and reviews contractor's compliance with state and federal statute to determine when corrective actions are needed. Tracks metrics and provide higher levels of follow-up on the Salesforce system. Provides business analysis for all projects the team undertakes with the Salesforce environment.