HCPF Escalations Shared Definitions
5/27/2025

1. **Escalation**
   a. An increase in the severity or seriousness of an issue, typically tied to whether the applicant or member's case is or has been impacted by the actions taken or not taken by the eligibility site.

2. **Complaint**
   a. A statement received expressing dissatisfaction or concern about a specific scenario or incident.

3. **Grievance**
   a. A complaint about a perceived or actual wrong that can be the basis for action

4. **Salesforce**
   a. Integrated customer relationship management platform that HCPF uses to manage incoming tickets received by stakeholders.

5. **Ticket**
   a. Is a request submitted by members, stakeholders and HCPF staff requesting assistance or seeking solution to their grievances.

6. **Parent Ticket**
   a. Establishes connection with other tickets. Original submission for a specific request.

7. **Child Ticket**
   a. Also establishes connection with other tickets. All submissions after the original submission, all concerning the same request.

8. **HEAT Ticket**
   a. Requests that Salesforce users can submit for change requests and technical support.

9. **Ticket Type**
   a. A single label that is used for reporting purposes, to identify the ticket belongs in HCPF's Escalations queue.

10. **Ticket SME Areas**

a. Multiple labels used for reporting purposes and to further clarify the reason for the ticket. This also assists in ensuring that the ticket gets assigned to the correct person who can resolve the issue or grievance.

11. Status
   a. An ordered collection that allows the ticket assignee to organize and assign tickets to reflect what step in the process each ticket is at. A list of the existing status' and their intended purposes are below:
      i. "TA: New"
         1. Any ticket that has been received but no action has been taken by the Ticket Assigner
      ii. "TA: Pending: Ticket Assignment"
         1. When the ticket is received but the Tier 1 ticket owner has yet to be identified by the Ticket Assigner
      iii. "TA: Not Successfully Assigned - Non-Medical Assistance Related"
         1. Any ticket that was received, initially reviewed by the Ticket Assigner but that is not related to Medical Assistance in any way and could be sent to another state agency as identified
      iv. "T1: Pending: Initial Review"
         1. A ticket that has already been reviewed by the Ticket Assigner and is assigned to a Tier 1 user will automatically default to this, indicating that an initial review of a Tier 1 user is still needed
      v. "T1: In Progress with Ticket Owner"
         1. A ticket in this status indicates that it has had an initial review completed by a Tier 1 user, but additional work is needed
      vi. "T1: Successfully Resolved"
         1. A ticket where the submitted escalation, grievance or complaint was able to be resolved, all actions that HCPF could take to resolve have been completed (no additional HCPF action is needed)
      vii. "T1: Not Successfully Resolved"
         1. A ticket where the submitted escalation, grievance or complaint was not able to be resolved
            a. Ex: A member has not responded to a request we made for additional information, which is critical to resolve the submitted grievance.
      viii. "T2: Pending Initial Review"
         1. A ticket that has already been reviewed by a Tier 1 user and is assigned to a Tier 2 user will automatically default to this, indicating that an initial review of a Tier 2 user is still needed
      ix. "T2: In Progress with Ticket Owner"
         1. A ticket in this status indicates that it has had an initial review completed by a Tier 2 user, but additional work is needed
      x. "T2: Successfully Resolved"

1. A ticket where the submitted escalation, grievance or complaint was able to be resolved, all actions that HCPF could take to resolve have been completed (no additional HCPF action is needed)

xi. "T2: Not Successfully Resolved"

1. A ticket where the submitted escalation, grievance or complaint was not able to be resolved

   a. Ex: A member has not responded to a request we made for additional information, which is critical to resolve the submitted grievance.

xii. "Closed"

1. Not a status that should be selected, this represents the Salesforce system automatically "closing" after 21 days to no longer allow communications to be routed to a closed ticket

12. Ticket Owner

a. The person that reviews the ticket and addresses the request.

13. Ticket Assigner

a. The person who is responsible for management of the incoming tickets, completes mandatory ticket fields, and assigns the ticket to the appropriate owner within Tier 1.

14. Tier 1 Specialists

a. A group of individuals identified to work all incoming HCPF escalations tickets as an initial review. These Specialists will be provided specific training to HCPF's various programs, platforms, processes, etc… that will allow them to attempt to resolve as many received member escalations as possible. These Specialists will report to the County Administration Program Section Manager.

15. Tier 1 Users

a. A group of contacts from both Counties and CMAs that will resolve tickets that are assigned to their County and/or CMA.

16. Tier 2 SMEs

a. A group of identified subject matter experts (SMEs) that will attempt to resolve any member escalations that are assigned to their specific SME area. The SME areas at HCPF can include, but are not limited to, Case Management Specialists, Transition Housing Specialists, Appeals Specialists, Systems Specialists, Pharmacy Specialists, etc…

17. Ticket Origin

a. The location of where any ticket originated from. Within the HCPF Escalation queue a ticket could have been generated from a shared email, listed below, or by a submission of the webform.
    i. HCPF_MemberComplaints@state.co.us
    ii. HCPF_HCBS_CMEscalationsInbox@state.co.us
    iii. HCPF_EDO.Inquiries@state.co.us
    iv. HCPF_TCM_TC_Escalations@state.co.us
    v. [Health First Colorado and Child Health Plan Plus Grievance Form](#)

18. Service Level Agreement (SLA)

a. An agreement that is made between HCPF, Counties, Case Management Agencies (CMAs), Members and Stakeholders that outlines the assignment, response and resolution times for all tickets. The Ticket Assigner, Tier 1 and Tier 2 SLAs are broken down into different priority levels, each having its own time frame expectations. These SLAs will be published via an Operational Memo and sent to all stakeholders.

19. Queue Owner

a. The team responsible for the management of the HCPF Escalations queue within Salesforce. For this instance, the queue owner is identified as the County Relations team within the Policy, Communications and Administration (PCA) Office at HCPF.

20. Dashboards

a. A dashboard is a feature within Salesforce that is made up of specific reporting components which together provide at a glance information as to what is occurring within HCPF's Escalation queue at any given point.

21. Subject Matter Expert (SME)

a. A HCPF employee identified to be the expert of a particular subject within the department. This SME would be the go to person for a question surrounding that particular subject.

22. Priority Level

a. Predefined terms that ensure a ticket is worked by HCPF or a partner integrated into Salesforce, within a certain level of time. A list of the existing Priority Levels and their intended purposes are below:
    i. Urgent
        1. This status is used for member issues that are escalated through HCPF leadership Only
    ii. High
        1. A member has no access to care and/or no access to medication
    iii. Medium
        1. A member has access to care, but is pending termination

iv. Low
    1. A member has access to care, but is experiencing another issue related to access of care and/or anything else is reported

23. Ticket Fields

a. These are individual fields that each represent a critical piece of information that all HCPF Escalations Users would utilize to attempt to resolve any submitted ticket. A list of the existing ticket fields and their intended purposes are below:

i. "Ticket Number"
    1. A number automatically assigned to a new record when submitted into Salesforce, these numbers are unique and do not duplicate.

ii. "Contact Name"
    1. The name of either the member who is affected. If a ticket was submitted anonymously, this field will be populated with "Anonymous, Anonymous - CR"

iii. "Case Number"
    1. A case number assigned to a members open case

iv. "Relation to Member"
    1. If the submitter is not the member, this field will indicate the relationship of the submitter to the member.

v. "Authorized Representative"
    1. Yes/No question, is the submitter an Authorized Representative

vi. "Third Party Form Effective Date"
    1. The date the Third Party Form begins

vii. "Third Party Form Expiration Date"
    1. The date the Third Party Form ends

viii. "Ticket Type (Tire 1/Tier 2)"
    1. Indicates if it is a current Tier 1 or Tier 2 ticket

ix. "Ticket Tier 1 SME Area"
    1. A list of SME areas within HCPF that indicates which Tier 1 SME will be assigned a ticket for resolution

x. Subject"
    1. Title of the email submitted and/or the issue reported on the webform

xi. Ticket Owner"
    1. The user who currently has the ticket in their possession

xii. "Ticket Status"
    1. The current status the ticket is in which indicates where it is at in the ticket lifecycle

xiii. Webform State ID
    1. The Medicaid State ID associated with the member who the grievance is submitted by and/or about

xiv. "Aid Code Category"
    1. Program and services that a ticket can be related to

     xv.   "Aid Code/Program"
         1.   Program and services that a ticket can be related to
    xvi.   "County of Incident"
         1.   Selection of which County the member resides in
   xvii.   "County Size"
         1.   Size of the county selected above
  xviii.   "CMA"
         1.   Selection of the Case Management Agency (CMA) of incident
    xix.   "Eligibility Site"
         1.   Selection of the Eligibility Site of incident
     xx.   "Tribe"
         1.   Selection of the Tribe of incident
    xxi.   "Other Agency or Contractor"
         1.   Any other agency or contractor of incident that was not already captured by the above fields
   xxii.   "Web Name"
         1.   The name provided on the webform submission, this field will be blank if escalation was received via email
  xxiii.   "Web Email"
         1.   The email provided on the webform submission, this field will be blank if escalation was received via email and/or the submitter decided not to provide
  xxiv.   "Supplied Phone"
         1.   The phone number provided on the webform submission, this field will be blank if escalation was received via email and/or the submitter decided not to provide
   xxv.   "Receive Update?"
         1.   Yes/No question, does the submitter want to be provided updates. Note: Updates are only given to a non-member if appropriate release of information is on file
  xxvi.   "Preferred Method of Contact"
         1.   The preferred method of contact for the submitter; phone or email
  xxvii.   "Date of Incident"
         1.   Date the incident reported took place
 xxviii.   "Submitted Description"
         1.   Details submitted about the incident
  xxix.   "Tier 1 Resolution Description"
         1.   The details of what a Tier 1 Specialist has done to resolve the submitted ticket
   xxx.   "Is this being reassigned to Tier 2?"
         1.   Yes/No question, does this ticket need to go to a Tier 2 SME for resolution
  xxxi.   "Tier 2 SME Area"

1. A list of SME areas within HCPF that indicates which Tier 2 SME will be assigned a ticket for resolution

xxxii. "Tier 1 Priority"
    1. Priority level set, determined by situation and Tier 1 SLA

xxxiii. "Date Assigned to Tier 2"
    1. If the ticket is being reassigned to a Tier 2 SME, what is the date the ticket was assigned

xxxiv. "Tier 1 Resolution Due Date"
    1. Date the ticket is due to be completed per Tier 1 SLA

xxxv. "Rapid Reintegration"
    1. Checkbox, does this ticket involve Rapid Reintegration

xxxvi. "Department of Justice"
    1. Checkbox, does this ticket involve Department of Justice

xxxvii. "Access Rule"
    1. Checkbox, does this ticket involve Access Rule

xxxviii. "Cover All Coloradans"
    1. Checkbox, does this ticket involve

xxxix. "Tier 2 Resolution Description"
    1. The details of what a Tier 2 SME has done to resolve the submitted ticket

xl. "Tier 2 Priority"
    1. Priority level set, determined by situation and Tier 2 SLA

xli. "Tier 2 Resolution Due Date"
    1. Date the ticket is due to be completed per Tier 2 SLA

xlii. "Primary Root Cause - HCPF"
    1. Indicates a root cause related to HCPF

xliii. "Primary Root Cause - County"
    1. Indicates a root cause related to the County

xliv. "Primary Root Cause - Eligibility Site"
    1. Indicates a root cause related to the Eligibility Site

xlv. "Primary Root Cause - CMA"
    1. Indicates a root cause related to the CMA

xlvi. "Parent Ticket"
    1. A ticket that is related to another and is linked through a "Parent" and "Child" relationship in Salesforce