



## OPERATIONAL MEMO

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**OPERATIONAL MEMO NUMBER: HCPF OM 18-015**

**TITLE: BUS LOG NOTE CHANGES**

**SUPERSEDES NUMBER: N/A**

**ISSUE DATE: SEPTEMBER 17, 2018**

**EFFECTIVE DATE: SEPTEMBER 17, 2018**

**DIVISION AND OFFICE: CASE MANAGEMENT AND QUALITY PERFORMANCE  
DIVISION, OFFICE OF COMMUNITY LIVING**

**PROGRAM AREA: CASE MANAGEMENT**

**APPROVED BY: JENNIFER MARTINEZ**

**KEY WORDS: BUS, LOG NOTES, REPORT**

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### **Purpose and Audience:**

To provide case management agencies with clarification regarding recent Benefits Utilization System (BUS) log note changes as well as to request the tracking of cases where a case manager exceeds the 240 unit cap for Targeted Case Management (TCM) for individuals enrolled in a Home and Community Based Services (HCBS) waiver specific for individuals with intellectual and developmental disabilities (I/DD).

### **Background:**

As of July 1, 2012, a 240 unit cap for TCM was implemented. A unit consists of an activity up to 15 minutes in duration. The 240 cap is per fiscal year. Case management agencies are responsible for ensuring billing does not occur over the 240 cap for one individual per fiscal year.

In August 2018 the Department of Health Care Policy and Financing (Department) provided training for case managers regarding monitoring. During this training case managers were instructed to use the "Summary Report" options for "Type of Contact" to document all required contacts for the HCBS waiver.

Effective September 1, 2018 changes were made to the BUS log note screen and reporting capabilities. New items were added to the "Type of Contact" dropdown and enhancements were made to the "Face-to-Face" log note report as well as a newly titled "Log Notes Detailed Report." Additional radio buttons were added to indicate if the log note is documenting a TCM activity and if the documented units are "billable" or "non-billable".

**Information/Procedure:**

Case managers are to use the "Summary Report" options for "Type of Contact" to document all required contacts for the HCBS waiver for which they are providing case management. While some of these contacts are required to occur face-to-face, the "Summary Report" options provide a consistent method across all case management agencies to ensure required contacts are occurring. As part of the log note narrative, case managers should document who the contact was with and how the contact occurred (e.g., face-to-face, phone, etc.).

The "Log Notes Detailed Report" provides the "Type of Contact" information as part of the report, allowing agency leadership to obtain a detailed report of log notes, thus ensuring the required contacts are occurring. The report also provides the log note narrative, if desired.

Only case managers who document units per the requirements of the waiver should use the "billable" and "non-billable" options. Case managers are to refer to the Department's regulations and training for the waiver and/or type of case management they provide for information on what can and cannot be billed. For those agencies who provide TCM, this option must also be selected if the documented activity meets the criteria for a TCM activity.

Some Community Centered Boards (CCBs) currently track cases where case managers provide more than 240 units of TCM in a fiscal year. For those CCBs who have not tracked this, please begin tracking now using the "Log Notes Detailed Report". All CCBs should send the data to Brittani Trujillo, [brittani.trujillo@state.co.us](mailto:brittani.trujillo@state.co.us) by the 30<sup>th</sup> of every month, beginning September 30, 2018-March 31, 2019. CCBs should not submit claims for units that exceed the 240 cap.

**Attachments:**

None

**Department Contact:**

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