



OPERATIONAL MEMO

Title: Updated Case Management Daily Operations During Care and Case Management (CCM) Implementation	Topic: Case Management
Audience: Case Management Agencies (CMA), Single Entry Point Agencies, Community Centered Boards, Private Case Management Agencies	Sub-Topic: Care and Case Management (CCM) Implementation
Supersedes Number: HCPF OM 23-043	Division: Case Management and Quality Performance Division
Effective Date: July 28, 2023	Office: Office of Community Living
Expiration Date: August 1, 2024	Program Area: Case Management Agencies (CMA), Single Entry Point Agencies, Community Centered Boards, Private Case Management Agencies
Key Words: CIR, CCM, BUS, Critical Incident Reporting, Case Management Agency, Critical Incident Reporting; Intake Screening, Hospital and Nursing Facility Referrals, Level of Care Assessment, Functional Eligibility Notification, Certification Notice, And Log Note Documentation	
Legal Authority: 10 CCR 2505-10, 8.401.1;10 CCR 2505-10, 8.393.2.C ;10 CCR 2505-10 8.393.2.G.10 ;10 CCR 2505-10 8.300.E; Criminal Code § 18-6.5-108 C.R.S.;10 CCR 2505-10 8.393.2.C.1.a.-c ;10 CCR 2505-10 8.393.2.H.3.b	
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Purpose and Audience:

The purpose of this Operational Memo is to inform Case Management Agencies (CMAs) of the updated operational procedures and timelines related to the data migration

“freeze” of the Business Utilization System (BUS), DDDWeb, and implementation of documentation and use of the Care and Case Management System (CCM).

Information:

On June 29, 2023, HCPF released OM 23-043, in which CMAs were notified of operational procedures and timelines related to the data migration “freeze” of the Benefits Utilization System (BUS), DDDWeb, and Care and Case Management System (CCM). Previously provisioned users of the BUS and DDDWeb are only able to access records in a “read only” capacity, as of June 27, 2023; case management activities are no longer entered in those systems. Time-sensitive daily operations since June 27, 2023, have continued to be completed by CMAs as directed in OM 23-043. However, due to identified system errors at CCM “Go-Live” on July 5, 2023, some CMAs were unable to complete documentation as outlined in the timelines required by HCPF.

Critical Case Management Activity Operational Changes:

The Department is aware that some CMAs were unable to meet the required timelines outlined in HCPF OM 23-043, therefore, HCPF is adjusting requirements and timelines to account for the identified system errors. Effective immediately, CMAs shall:

- Complete all Critical Incident Reports entry and follow-up from the “freeze” period in the CCM as of July 12, 2023.
- Complete all documentation in the CCM within regulatory and contractual requirements, using the allowances below as a last resort.
- Continue to report all CCM issues to the CCM Provider Support Call Center at 1-844-235-2387 and obtain a Customer Tracking Number (CTN).

Updated timelines for documenting case management activities in the CCM that occurred during the “freeze” are as follows:

Department Prescribed Fillable PDF/ Activity	Must be entered in CCM by:
Colorado Intake Screen Tool	Friday, August 18, 2023, at 5:00 PM MT
Long Term Care Level of Care Eligibility Assessment	Friday, August 18, 2023, at 5:00 PM MT
Long Term Care Certification Form	Friday, August 18, 2023, at 5:00 PM MT
Log Note Activity (Activity Log)	Friday, August 18, 2023, at 5:00 PM MT
Information entered in Qualitrac portal for URUM and Target Criteria Reviews	Friday, August 18, 2023, at 5:00 PM MT

For the case management activities that have been extended to August 18, 2023, at 5:00 PM MT, this one-time timeline extension and allowance will expire at that time, and all regulatory and contractual requirements of case management activity timelines will resume.

Ongoing CCM Implementation Guidance

Department prescribed fillable PDFs documents are provided to use have been updated since the release of OM 23-043 and will continue to be updated as needed. HCPF will continue to include version dates on all posted PDF documents. CMAs shall instruct their employees to use the forms posted on the [Long-Term Services and Supports Case Management Forms and Tools](#) webpage. CMAs shall not use copies downloaded or otherwise saved versions, to ensure the correct forms are being used.

For members who require a revision to an active BUS Service Plan not yet migrated to the CCM, the case manager shall complete the service revision to the PAR in the Bridge, document revision details then obtain signatures on the [Service Plan Signature Page](#) and document the revision in the CCM Activity Log. The case manager shall upload the completed, signed Service Plan Signature Page to the CCM and provide a copy to the member and service providers, as applicable.

For members who have completed a portion of the process (e.g., ULTC 100.2) in the BUS and who still need to complete other steps in the process (e.g., IADL and/or Legacy Service Plan) in the CCM, case managers will reference additional step-by-step instructions for case managers on the [Known Issues web page](#) under the Case Manager tab as soon as the solution is announced and posted.

If a CMA has an urgent matter related to service planning with an imminent threat to a member's services, they may contact the HCPF Case Management Unit directly by emailing: [HCPF HCBS casemanagement@state.co.us](mailto:HCPF_HCBS_casemanagement@state.co.us).

All provisioned users will continue to have read-only access to the BUS/DDDWeb until all data from the BUS and DDDWeb data has been migrated to the CCM and throughout Phase 2 of CCM Implementation.

Impacts to Community Centered Board (CCB) and Single Entry Point (SEP) Contract Payments

The Department will process July payments on the regular schedule with reports being pulled on August 14, 2023, for SEP payments and CCB administrative payments on August 16, 2023, which will include CCB State General Fund program payments. This will minimize impacts to frequency of payment to all agencies. The Department will pull a second report for July payments for both CCBs and SEPs on August 21, 2023, to identify any activities that were not processed under the previous payment.

These discrepancies will automatically be added to the CCB and SEP August payments processed in September by the Department. CCBs and SEPs will not be required to submit payment correction forms until August payments are processed in September. The Department will continue to rerun payment reports and cross check for missing activities through the December payment to ensure there is limited disruption to CCB and SEP reimbursement.

CCBs and SEPs that will be in Phase 1 of the CMA transitions will have shortened timeframes for the month of October. Additional communication related to data entry and October payments will be provided during the CMA transition process.

Please refer to the *Community Centered Board Data and Rates Technical Guide* and *Single Entry Point Data and Rates Technical Guide* that were updated and posted to the [Long-Term Services and Supports Case Management Forms and Tools](#) webpage.

Post System Implementation Agency Review

No later than August 31, 2023, HCPF requests that each CMA complete an internal audit to ensure that requirements and timelines outlined in this MEMO, including all Critical Incident Reporting and Follow-up and CMA documentation have been documented in the CCM and to ensure that all regulatory and contractual obligations have been fulfilled; statutory and regulatory requirements are listed below:

- 10 CCR 2505-10, 8.401.1 - Level of Care Screening
- 10 CCR 2505-10, 8.393.2.C - Functions of a Single Entry Point
- 10 CCR 2505-10 8.393.2.G.10 - CIR Notification timeline requirement
- 10 CCR 2505-10 8.300.E - CIR Follow-up timeline requirements
- Criminal Code § 18-6.5-108 C.R.S - Mandatory Reporting Rule
- 10 CCR 2505-10 8.393.2.C.1.a.-c. Assessment and PASRR
- 10 CCR 2505-10 8.393.2.H.3.b - Log note timeline requirements

Action To Be Taken:

CMAs shall familiarize themselves with the processes and timelines described in this communication and go to the [Long-Term Services and Supports Case Management Forms and Tools](#) webpage for all current and Department required forms for case management activities until otherwise instructed. As previously mentioned, **this communication is not final** and minor changes may occur to communication until the final document has been approved through the Department's clearance process. HCPF will post the final

Operational Memo communication via the HCPF Memo Series at that time. Please reference the final Operational Memo after it is posted via the HCPF Memo Series.

Definition(s):

None

Attachment(s):

None

HCPF Contact:

For Critical Incident Questions, contact us at:

HCPF_CIRs@state.co.us

For all Case Management Operational and Policy questions, contact us at:

HCPF_HCBS_casemanagement@state.co.us

For all CCM escalations not resolved by the CCM Call Center, contact us at:

hcpf_ccm_stakeholder@state.co.us

For all CCB Contract payment questions, contact

Lindsay.Snyder-Hurley@state.co.us.

For all SEP Contract payment questions, contact

Sarah.McDonnell@state.co.us.

For all CCB and SEP billing report questions, contact

Amanda.Allen@state.co.us and Lauren.Stanislaw@state.co.us.