



OPERATIONAL MEMO

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Purpose and Audience:

The purpose of this Operational Memo is to provide instructions to county departments of human/social services (counties), Medical Assistance (MA) sites, and Eligibility Application Partners sites (EAP) regarding the Public Health Emergency (PHE) Long Term Care Extension Outreach project implemented by the Department of Health Care Policy and Financing (HCPF) in September 2023. The purpose of the project is to ensure individuals with Long Term Care coverage at risk of procedural denials receive an additional outreach before being disenrolled, in accordance with federal direction.

Background Information:

The end of Continuous Coverage and the return to normal eligibility operations began with May 2023 renewals (noticing in March) and will continue through renewals due in April 2024. As part of its monitoring of state Medicaid Programs during the PHE Unwind, the federal government's Centers for Medicare and Medicaid Services (CMS)

sent letters to states to encourage reductions in procedural denials. The Long Term Care (LTC) Extension and Outreach project is meant to reduce procedural denials for failure to return the renewal packet in the LTC population, by extending the packet due date an additional 60 days.

HCPF has established an Outbound Contact Center (OBCC) which will outreach to members who have yet to renew their coverage but are still within their “60-day extension” period. This outreach will occur throughout each month to new cohorts that enter into the “60-day extension period” throughout the rest of the PHE unwind. **As this is a new initiative, the Department will issue revised guidance and update this memo as additional federal directives or new operational details are known.**

The purpose of the outreach is to determine whether the member needs additional assistance completing their renewal, or if the member no longer needs coverage, to document that and take appropriate action. If the member needs assistance completing their renewal, their information will be forwarded to the county of residence or eligibility site assigned to the case. The county of residence or eligibility site assigned to the case will need to reach out to the member to assist with the renewal which will help the member complete before the extension period ends. Counties also can leverage the Good Faith extension. This outreach and additional assistance provides LTC members, whose applications are often complex and time intensive to complete, another opportunity to renew before losing their coverage.

LTC Outreach Process Overview: Narrowing Outreach to Reduce County Impact
HCPF communications to counties regarding members and cases will occur directly with the county’s identified Escalation Contact.

Outreach lists target LTC members up for renewal who are at risk of a procedural denial for failing to return their renewal packet or signature but are within their 60-day extension period. The OBCC agents have been trained to research the member case and status within CBMS prior to outreach. If the renewal has been completed, case comments indicate the county is actively working the renewal or the member is deceased, no outreach will be conducted; and the member will be removed from the outbound dialer. We will not be contacting counties about these cases.

Once initial research to narrow the outreach list has been completed, the OBCC workflow has two (2) options, if the member answers and if they do not answer.

- If the member answers,
 - The member states that they have returned the renewal packet
 - If less than 10 business days, not forwarded to county. OBCC will inform the member to check PEAK for updates

- If more than 10 business days, ticket will be created and sent to the County Relations Team so that the county can research to be sure the packet was received, and then complete the renewal.
 - The member states they did not know they needed to do anything
 - If they need help, a ticket is created for the county
 - If they do not need help, the OBCC will stress the importance of returning the packet and will remove the member from their outbound call list
 - The OBCC agent sees that the Verification Checklist (VCL) is outstanding
 - If they need help, a ticket is created for the county
 - If they do not need help, the OBCC will stress the importance of returning verifications
 - The member states they never received anything
 - Guide member to complete renewal on-line through PEAK or the Mobile Health App
 - If they need a packet resent, the OBCC agent will send another packet to the member. Should the member state that their address is incorrect, the OBCC agent will update the member's mailing address in PEAK then send out the packet.
 - If the member gets a packet resent, they will remain on the OBCC outbound call list for an additional 7 business days, after which another call will be made to ensure the member received the packet and no longer needs assistance. If they still need further assistance, a ticket will be created and escalated to the county or EAP site.
 - Should the member state that they are homeless, the OBCC will flag this and transfer the ticket to the county for further assistance
 - If they do not need help, the OBCC will stress the importance of completing the renewal
 - The member no longer needs/wants benefits, the OBCC will remove the member from their outbound call list and in PEAK Pro enter that they are no longer requesting assistance
- If the member **does not** answer,
 - If the call is connected, the agent will leave a voicemail message informing the member of the purpose of the outreach and to call the OBCC back when they are available. The OBCC will attempt outreach a total of three (3) times.
 - If the call is connected and there is no voicemail option, the OBCC will keep this member on their outbound call list. The OBCC will attempt outreach a total of three (3) times.

- If the call is not connected, the OBCC will make note that the phone number provided is not in service and will remove the member from their outbound call list

Once the OBCC gets in contact with the intended member and if needed creates a ticket in Salesforce, this ticket will be internally transferred to the County Relations team. On a daily basis the identified members of the County Relations team will go into each member's ticket and based on the county of incident, the HCPF team will follow one of two processes:

- County receives EAP site assistance
- County **does not** receive EAP site assistance

EAP Site

There are two EAP sites available to provide assistance with LTC renewal processing at HCPF's direction. For the counties that receive EAP site assistance, the County Relations team will forward all tickets received daily for that county to the appropriate EAP site. The counties assigned to the EAP sites are subject to change, this change can occur at the start of each month through June 2024. ***Please note: EAP sites work Medical Assistance-only cases. Any member with a case that is related to any Buy-In programs go to Colorado Medical Assistance Program (CMAP); cases where the member is also on any other high level program groups (cash assistance or food assistance) will be routed to the county of residence.***

Counties

For the counties that **do not** receive EAP site assistance, the next steps will depend on what each individual county has selected for the receiving of these tickets.

- Option 1 - Daily Salesforce Tickets will be sent directly to the county escalations contact(s)
 - The county can expect to receive an individual email for each ticket sent, the email will include all information the OBCC was provided. This can include:
 - Member Information
 - Priority Level
 - Resolution Timeline
 - Best Contact Information (phone numbers, good days and times to contact, name of who the OBCC agent spoke to)
 - Renewal Packet Information (Was a packet submitted? Date the packet was sent back, did the member renew in PEAK, does the member need assistance)
 - Other Details (any other information the OBCC agent was provided that is relevant for the counties)
- Option 2 - Daily report including all assigned tickets to your county will be sent directly to the county escalations contact(s)

- The county can expect to receive a single report for each day. This report will be sent daily at 9:00am and will include all the previous days tickets for that county. (***Please note: The Service Level Agreement (SLA) will not start until the daily report is sent to counties.***)

Escalation Ticket Communications Expectations

Every Monday by 9:00am, the County Relations team will send each county and EAP site a weekly report which will include all tickets received for the previous week. This report will include columns for counties and EAP sites to provide updates on each ticket's status and the required outreach attempt(s). An outreach attempt can be defined as any of the below, please make note of the date and time for each attempt:

- Making an outbound call with no answer,
- leaving a voicemail,
- and/or connecting with the member.

Each county, MA, and EAP site will determine what process will be used, within their existing processes, for these outreach attempts.

The Service Level Agreement (SLA) for each county, MA, and EAP site attempt will be four (4) business days per outreach attempt. The required two (2) attempts in total will allow for an eight (8) business day span. The Service Level Agreement (SLA) for each county, MA and EAP site will be a first outreach attempt will be made within four (4) business days. If the member is not reached, a second attempt will be made within four (4) more business days, for a total of up to two (2) outreach attempts in eight (8) business days. If you connect with a member after the first attempt, document that in your reporting and you do not need to do any further outreach.

These ticket status updates will be required to be sent back to the County Relations team the Monday after the initial report is sent by 9:00am.

- **Example:** Weekly report is sent to the county on Monday, October 23, 2023, which will include all open tickets from October 16 - 20, 2023. These updates will be due back to HCPF no later than Monday, October 30, 2023.

Updating Daily and Weekly Reports

The daily and weekly reports created and sent out to counties and EAP sites, will be saved into the [Eligibility Site Reports SharePoint site](#), managed by HCPF. All county Directors and county escalation contact(s) have been granted access to this SharePoint site. All updates provided by counties or EAP sites should be updated through the appropriate report saved in the "LTC Outreach Project - Reports" folder located in the upper right corner of this SharePoint page.

Please **DO NOT** save a new copy of these reports, simply open the report you wish to update and make changes directly in the document. Each of these reports has a tab for each county and EAP site. Please only change the areas you are responsible for as to not skew the data.

Resolution of a Ticket

A ticket is considered resolved if/when any of the below takes place:

- County/EAP site attempts outreaches to member two (2) times and responds back to HCPF to confirm these attempts,
 - Yes, connection with member was successful
 - No, no connection with member was not successful
- Member's renewal packet was submitted
- Member confirms no assistance was needed

If on the first attempt a connection was made there is no need to do a second call/outreach attempt, the goal is to connect with the member to support them in completing the renewal process.

Action To Be Taken:

Departments of Human/Social Services (counties) shall work all tickets received throughout the duration of this outreach project, June 2024, and shall provide HCPF with updates on a consistent basis utilizing the provided daily and weekly reports.

Definition(s):

Salesforce - The integrated customer service relationship management platform that HCPF uses to manage incoming member grievances and other stakeholder related items.

Ticket - Is a request submitted by members, stakeholders, and HCPF staff requesting assistance, seeking a solution to their grievances, or submitting information to remain in compliance.

Attachment(s):

Long Term Care Extension Outreach - Visual Process Map

[Health and Human Services \(HHS\) - Letter to US Governor's on Medicaid Redeterminations](#)

HCPF Contact:

[Member Escalation Webform](#)

HCPF_MemberEscalations@state.co.us