OPERATIONAL MEMO

Title: Launch of Referral Functionality in PEAKPro for Long Term Services and Supports	**Topic:** Case Management
Audience: Case Management Agencies	**Sub-Topic:** HCBS
Supersedes Number: N/A	**Division:** Case Management Quality Performance
Effective Date: Nov. 1, 2024	**Office:** Office of Community Living
Expiration Date: Nov. 1, 2027	**Program Area:** Case Management Agencies
Key Words: Case Management, CMA, PEAK*Pro*, Referrals, Long-Term Services and Supports, Long-Term Care	
Legal Authority: N/A	
Memo Author: Rhyann Lubitz	
Operational Memo Number: HCPF OM 24-046 **Issue Date:** September 13, 2024 **Approved By:** Bonnie Silva	

Purpose and Audience:

The purpose of this Operational Memo is to notify Case Management Agencies (CMAs) of the launch of the referral functionality in PEAK*Pro* for Long-Term Services and Supports (LTSS) effective Friday, Nov. 1, 2024.

Information:

CMA staff currently utilize the PEAK*Pro* system to check members' financial eligibility and view the LTSS Level of Care certification processing status. Effective Nov. 1, 2024, PEAK*Pro* will be used to receive referrals for Level of Care Assessments for LTSS. Referrals in PEAKPro will come from both PEAK and Colorado Benefits Management System (CBMS).

CBMS referrals are from eligibility site staff who have received information from members who have a need for LTSS and have been pended in CBMS for an LOC

determination. Referrals from PEAK are from members who have indicated a need for LTSS through their PEAK portal. CMAs are required to incorporate PEAK*Pro* as one of the systems they utilize to complete their case management roles and responsibilities. As of Nov. 1, 2024, CMA staff will process referrals from PEAK*Pro* according to the same timelines for other referral sources as outlined in regulation and contract, according to their CMAs identified operational policies and procedures.

CMA staff will also have access to two new reports in PEAK*Pro* located on the 'Reports' page.

Report 1 is titled: "Total number of assessment referrals". When a date range is entered, this report will provide the total number of assessment referrals per CMA/county within the entered date range.

Report 2 is titled: "Assessment referral details". When a date range is entered, this report provides a detailed list of each referral within each case management agency/county:

- Date the assessment referral was received

- Current status

- # of Days in New Status

- # of Days from New to Complete Status

- # of Days from New to Pending Status

- # of Days from New to Withdrawn Status

- # of Days from New to Duplicate Status

Your CMA organizational contact for PEAK*Pro* will receive a weekly email indicating the total number of assessment referrals that your CMA received for the previous week through PEAK*Pro* that are either New or in a Pending status.

Action To Be Taken:

CMA staff are required to complete training on the use of the referral and reporting functionality within PEAK*Pro*.

A PEAK*Pro* training module will be available for Case Managers to access in the CM Learning Management System by October 14, 2024. This module will include a

refresher on all PEAK*Pro* functionality and highlight using the referral and reporting features. Case Managers are required to access and complete the module by Oct. 28, 2024.

Additionally, a PEAK*Pro* training presentation deck and CM Desk Resource will be available on the LTSS Training Website.

PEAK*Pro* Training Office Hours for Case Managers

Three office hour sessions are available for Case Managers to attend with their questions and receive support in learning the new features in PEAK*Pro*. Attendance is highly encouraged for CMA staff who perform intake and referral functions.

Register for one session using this Zoom link.

Date: Monday, Oct. 28, 2024, 1 to 2 p.m.

Date: Tuesday, Oct. 29, 2024, 11 a.m. to 12 p.m.

Date: Wednesday, Oct. 30, 2024, 10 to 11 a.m.

Operational Changes:

CMAs are to update policies and procedures, as appropriate, to include operational changes required by the implementation of PEAKPro as a new referral source.

Resources:

- Operational Memo 24-002 - Launch of Streamline Eligibility and PEAKPro

- Case Management Agency Peak*Pro* Desk Resource located on the LTSS Training Website

Definition(s):

None

Attachment(s):

None

HCPF Contact:

hcpf_hcbs_casemanagement@state.co.us