



## OPERATIONAL MEMO

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<b>Title:</b> Case Management Agency and Case Manager Roles and Responsibilities	<b>Topic:</b> Case Management
<b>Audience:</b> Case Management Agencies	<b>Sub-Topic:</b> N/A
<b>Supersedes Number:</b> N/A	<b>Division:</b> Case Management Quality Performance
<b>Effective Date:</b> Nov. 26, 2024	<b>Office:</b> Office of Community Living
<b>Expiration Date:</b> Nov. 26, 2026	<b>Program Area:</b> Case Management
<b>Key Words:</b> Case Management, Case Manager, Long-Term Care, LTC, Long-Term Care Services and Supports, LTSS	
<b>Legal Authority:</b> Case Management Contract, 10 CCR 2505-8.7000	
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<b>Issue Date:</b> Nov. 26, 2024	
<b>Approved By:</b> Amanda Lofgren	

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### **Purpose and Audience:**

The purpose of this Operational Memo is to notify Case Management Agencies (CMAs) administering the delivery of Long-Term Services and Supports and the Case Managers of the guidance outlining their respective roles and responsibilities performing case management activities for Health First Colorado, Colorado's Medicaid Program.

### **Information:**

The Department of Health Care Policy and Financing (HCPF) worked collaboratively with CMAs and community partners to create documents that identify the roles and responsibilities of CMAs and Case Managers. These documents are intended to outline the Department's expectations for CMAs, Case Managers, Members, and community partners the roles and responsibilities of the CMA and Case Managers.

## Action To Be Taken:

CMA agency leadership, including administrators and supervisors, are required to review both documents (CMA Roles and Responsibilities and Case Manager Roles and Responsibilities) to ensure their CMA has operationalized these requirements within their organizations. CMAs are encouraged to share these documents on their websites.

All existing Case Managers are required to access the Case Manager Roles and Responsibilities document in the Learning Management System (LMS) to review and complete the acknowledgement that the document has been reviewed in its entirety prior to Jan. 15, 2025.

- To access the content within the LMS, please login and search “Long-Term Services and Supports Case Manager Roles and Responsibilities Form”.
- Case Managers are to read the document and attest they understand and will meet the outlined roles and responsibilities. The Case Manager will select “Yes I Have” when finished reviewing the document to attest that the document has been reviewed in its entirety.
- Case Managers who have questions or concerns about their ability to perform their role and responsibilities should work with their CMA leadership to obtain training and support as needed.

After Jan. 1, 2025, all newly hired Case Managers are required to access the Case Manager Roles and Responsibilities document in the LMS and complete the required attestation within 120 days of their employment start date along with all required CMA training material as outlined in section 1.3.4 of CMA contracts.

## Definition(s):

Case Management Agency means a public, private, or non-governmental non-profit agency that meets all applicable state and federal requirements and is certified by HCPF to provide Case Management services for Home and Community-Based Services waivers.

Case Manager means an employee of a Case Management Agency who performs the required Case Management Activities.

## Attachment(s):

[Case Management Agency Roles and Responsibilities](#)

[Case Manager Roles and Responsibilities](#)

**HCPF Contact:**

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