

# Memo Series

## Phase II

Presented by: Sarah Rogers



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# Memo Series Refresher & What is Phase II?

The Memo Series was operationalized in 2018, allowing for over 4 years experience in the process.

## Why issue a memo?

- 3 Types: Policy (highest level), Operational and Informational
- Memos standardize policy communications for counties and eligibility sites, contractors, case managers, providers and other partners.
- Supplements, clarifies and operationalizes rules, contract or requirements and can help communicate Department expectations and guidance quickly

Memo Series Phase II is a Department-wide project that will implement and focus improvements to both processes and the Memos issued.

All Phase II project requirements are based on internal and external feedback.



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# County/Continuous Improvement Feedback Sessions

In 2019 and 2020, our Continuous Improvement team conducted Learning Sessions on the Memo Series, specifically to capture front-line staff feedback

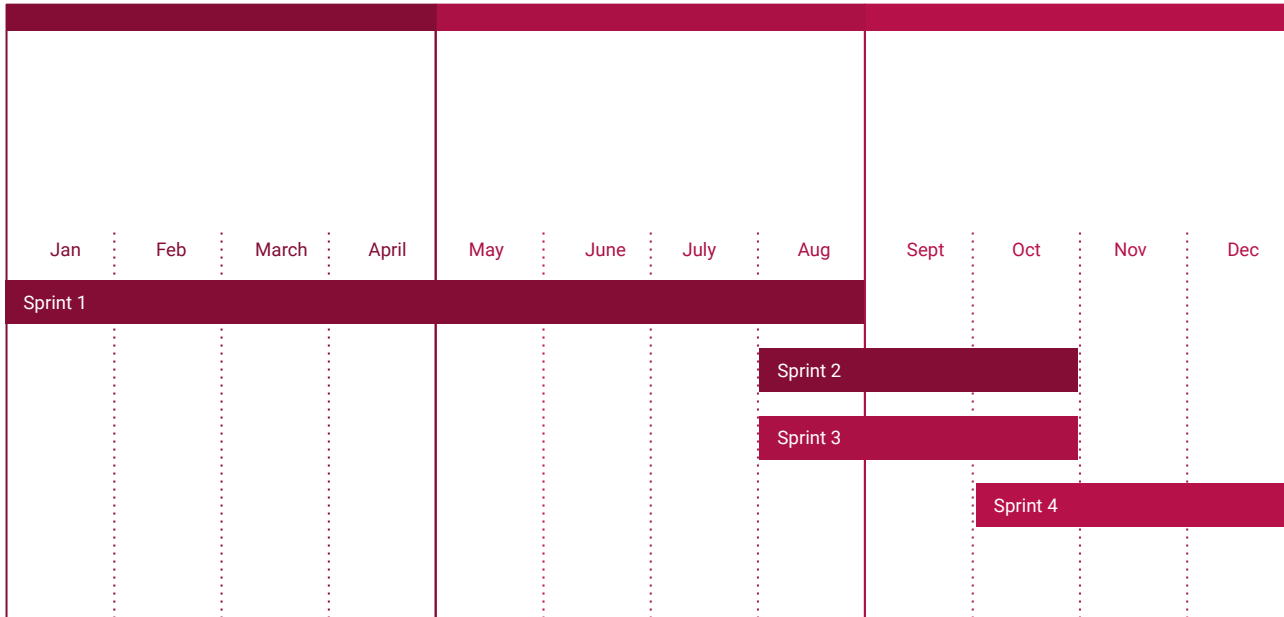
Improvements included in Phase II include many of the aspects reported by front-line staff, including improving templates and readability, distributing information more broadly and effectively, and more.



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# Process for Updates



# Sprint 1

- Website Revision

- New web pages - page for Memo Type, not year
- Searchable code added to each page, top of each column.
  - Can search multiple columns at once
  - Demo site, [click here](#)

- Distribution

- CBMS Community Page - working in conjunction with CBMS for distribution (completed)
- Expanding distribution lists
- cross-posting in other systems, if possible



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# Sprint 2

Department SOP (ADM-021) revisions in progress include:

- Instructions on issuing appropriate guidance to make Memos more legally defensible
- Addition of mandatory expiration dates, retroactive to Agency Letters to remove outdated guidance (some ALs date from 2002)
- Require an audit archives where all previously issued Memos are posted, with stamp of effective dates
- Require additional accountability by authors for Memos issued



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# Sprint 3

## • Process Revisions

### □ Standardize:

- Topics
- Sub-topics
- Audience

### □ Additional tracking of initiators/authors/supervisors to account for staff turnover

## • Template Revisions

### □ Title, Supersedes #, Effective date, Program area & key words - stay the same

### □ Addition of

- Topic (dropdown)
- Subtopic (dropdown)
- Audience (dropdown)
- Expiration Date (useful for IM's re: Stakeholder engagement)
- Legal Authority and performance expectations (Ex: Do \_\_\_ within XX calendar days.)



# Sprint 4

- Website Revision - Archiving

- Separate page for superseded memos and previously issued Memos
- Operationalizes SOP ADM-021 requirements for Audit Archive
- Allows for searchability of all previously issued guidance, will making clear effective dates of guidance

- Rules/Contract Changes

- County Administration rule will be passed institutionalizing Memo Series as operational guidance for counties
  - Further information will be shared when county administration rules are up for regulatory efficiency review later this year
- Contract managers encouraged to add language to contracts, as needed



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# Contact Info

Sarah Rogers

[Sarah.Rogers@state.co.us](mailto:Sarah.Rogers@state.co.us)



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# Quality Assurance/Quality Control Memo

Presented By: Terri Alexander



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# MAP Dashboard Transition to Tableau

Presented By: Eli Kaplow & Veronica  
Irizarry



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# Road to Tableau

MAP Dashboards, in Excel version, were implemented in late 2021.

Since that time, county feedback has focused on the usability and readability of the Excel version, being able to access background data, and more.

In early 2022, the Department partnered with CDHS' C-STAT to implement a shared performance management portal in Tableau - this move improves the MAP Dashboard in the areas counties identified.

# Road to Tableau

Thank you to the Tableau pilot volunteers for their time and feedback!



<b>Connect For Health</b>	Roshawn Fisher
	Jennifer VanCleave
<b>Denver County</b>	Michael Lamp
<b>Jeffco County</b>	Cody Short
<b>La Plata/ San Juan County</b>	Martha Johnson
<b>Larimer County</b>	Heather O'Hayre
	Jill Maasch
	Bernadette O'Keefe
<b>Mesa County</b>	Michelle Trujillo
<b>Rio Blanco County</b>	Carmen McKay
<b>Weld County</b>	Jessica Antonucci
	Sarah Rhoten
	Vanessa Fewell
	Andie Garnand

# Tableau Work in Progress

- Trials have started with a small group of sites
- Database infrastructure complete
- All 4 dashboards combined into a single solution
- Currently working with IT to get access for all sites



# MAP Dashboard: Tableau Walkthrough

Eli Kaplow,  
Eligibility Data  
Analyst

# Tableau MAP Dashboard Users

The county/MA site user list provided to CDHS was our Map Dashboard list that is maintained on the MAP Dashboard SharePoint site.

- We are currently not adding or removing any new users to Tableau until CDHS provides us with their process.
  - *\* New accounts estimated to be added- November 2022*
- The MAP Dashboards will also be available on SharePoint until January 2023. We will continue to add SharePoint MAP users until we transition fully to Tableau. *Note, these new users will not have Tableau access.*



# Tableau Access

1. For **Existing** Tableau users: Please email the [Map\\_dashboard@state.co.us](mailto:Map_dashboard@state.co.us) inbox and we will provide you with a Tableau link to access the HCPF MAP Dashboards.
2. For **New** Tableau users: In your email let us know you're a new user, we will provide you with your Tableau login, temporary password and OIT login instructions.
3. **Good news!** CDHS will provide Tableau licenses, at no cost to counties and eligibility sites, up to 5 user licenses (instead of 2). *Note: If your county has over 5 MAP Dashboard owners listed, they were all provided with Tableau access, however you have exceeded the cap and therefore cannot request new licenses without removing users.*
4. **All MAP Dashboard Tableau Users Walkthrough:** November meeting invite to follow (tentatively 11/17/22)



# Questions?