



# PEAKPro for Case Management Agencies

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# Purpose

Explain the functionality of *PEAKPro* and how Case Management Agencies (CMAs) will use it

# Objectives

At the end of today's training, you will be able to:

- Explain the purpose of *PEAKPro*
- Understand what you will be able to do and see in *PEAKPro*
- Know how to request access to *PEAKPro* and submit HD tickets for *PEAKPro*



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# What is PEAK?

**P**rogram **E**ligibility and **A**pplication **K**it

Learn about, apply for and manage assistance benefits online  
24 hours a day, 7 days a week.

[PEAK Brochure](#)



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# PEAK Account Services

View Account  
Information

View  
Correspondence

View/Pay  
Monthly Health  
First Colorado  
Buy-in Premiums

Complete and  
submit Renewals

Upload  
Documents

Receive  
text/email  
correspondence  
alerts

View needed  
verifications

Report case  
changes

View/Print  
Medical ID Cards



# What is PEAKPro?

PEAKPro allows for sharing of information and automation of processes that are currently manual and paper-based between the eligibility sites and long-term services and supports (LTSS) case management agencies

- Streamline Implementation Date: February 17, 2024
- Case Management Agencies (CMAs) will begin utilizing some PEAKPro functions as of March 1, 2024 and some on July 1, 2024
- Continue current referral process through June 30, 2024



# Systems Interfaces

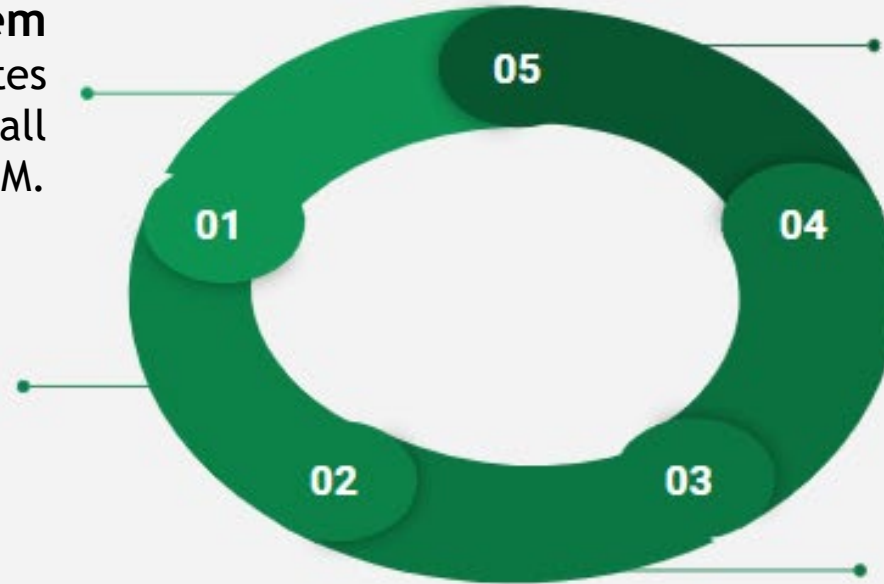
Eligibility and level of care (LOC) status communicated electronically through systems

## Care and Case Management (CCM) System

Case manager completes functional assessments and all required steps in CCM.

## PEAKPro

CCM interfaces with PEAKPro, requesting eligibility for LTSS programs from CBMS.



## Bridge

Bridge receives updated eligibility, goals and service planning approval for PARs.

## interChange

interChange communicates eligibility status back to CCM and Bridge.

## Colorado Benefits Management System (CBMS)

CBMS holds current eligibility information. CBMS communicates with PEAKPro and interChange, communicating eligibility status.



# What will a Case Manager use PEAKPro for?

## Referrals

- CMA will have ability to retrieve Assessment referrals from members via PEAK or CBMS Effective 7/1/2024
- CMA will have ability to search for any member that is known to CBMS and retrieve current eligibility data

## Ongoing Eligibility

- CMA will have ability to search for any member that is known to CBMS and retrieve current eligibility data
- CMA will have the ability to view the current processing status of the LTC LOC certification that they entered in CCM and sent to PEAKPro/CBMS for processing



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# New State

## With implementation of Streamline eligibility:

- CMAs will no longer send the Case Management Agency and Eligibility Information Sharing Form (DSS1) and LTSS certification pages to the county eligibility site. This information is automatically communicated between systems.
- [CMA and Eligibility Information Sharing Form](#) would only be used for:
  - Communication regarding cases completed prior to 2/19/24
  - Communication if the System Interface is not functioning
  - Other communication when needed, e.g., Referrals

## With the implementation of PEAKPro a case manager will

- Check Member Eligibility
- Check the processing status of the LTC LOC certification
- Receive referrals for LTSS programs (coming 7/1/2024)



# Getting Access to PEAKPro

1. The Department of Health Care Policy and Financing (HCPF) will send the [3rd Party User Access Request forms](#) to all users that are currently provisioned for CCM. The applications will be sent out via Adobe Sign with the PeakPro application section filled out for the users.
  - The user will only need to complete Section 2 - Individual User Information and sign the form.
  - The form will be automatically routed for supervisor and security admin signatures
  - Once the appropriate agency signatures are completed, the application will be routed back to HCPF via Adobe Pro for processing.
1. For those who do not have existing CCM access and need access to PEAKPro, the standard provisioning process will be followed. Completed HCPF 3rd Party Access Request forms should be sent to [HCPF\\_OCLSystemApplications@state.co.us](mailto:HCPF_OCLSystemApplications@state.co.us) for processing.



# Getting Access to PEAKPro

3. Communication will come from HCPF with approval of access with org ID and passcode.
3. To self-register go to PeakPro, create account, request new user, put in org ID and passcode, verify email address, receive verification code
3. Once you've completed this step reply to the email you received

**Note:** Due to the volume of provisioning, you may not have an account right away on 3/1/2024. We are working through these as fast as possible.

# Getting Started

- Logging in
- Ping ID
- Tips and Tricks



## Sign in

Email address or mobile number

Enter email address or mobile number

[Forgot email address or mobile number?](#)

Password

Enter password

Show

[Forgot password?](#)

Remember me

Sign in

Or



Sign in with Connect for Health Colorado

Don't have an account? [Sign up](#)



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# Navigating *PEAKPro*

- Case Management Inbox (starting 7/2024)
- CBMS Eligibility Check (starting 3/1/2024)
- LTC LOC Certification Processing Status (starting 3/1/2024)



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# Case Management Agency Inbox

PEAKPro SIT TEST Sign Out

PEAKPro

**> INBOX**

Eligibility Check

LTC LOC Certification Processing Status

Upload Documents

Reports

Change Type

## Case Management Agency Inbox

### LTC Assessment Referrals

Submit Date	Tracking #	Status	Name	Social Secur Number
01/23/2024	6158455968	New	Swithin, Tommie	5152
01/24/2024			Hogan, Shanita	5520
01/25/2024			Kennicot, Magdalen	4210
01/29/2024			test, MAJAMIE	5355
01/26/2024			LTCtest, AFB	3679

1-5 of 5 records Page 1 of 1

**The Inbox will not be used until July 1, 2024**

### Search criteria

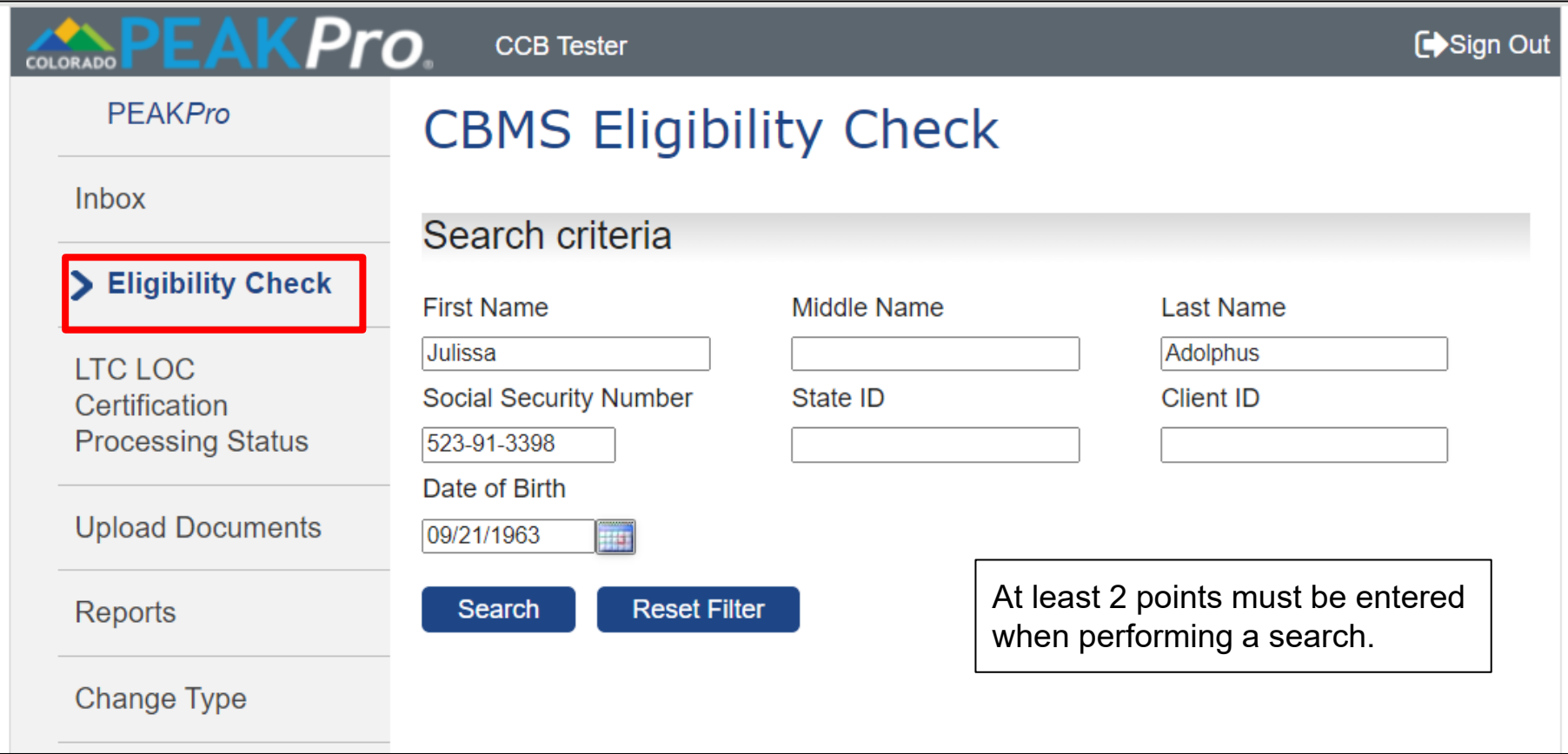
From Date: 01/22/2024 To Date: 01/29/2024 Status: < click here to choose >

First Name: Last Name: Social Security Number:

CBMS Case #: Source: Assigned To: pro\_1702255817834@pea...

Search

# CBMS Eligibility check



**PEAKPro** COLORADO CCB Tester Sign Out

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Inbox

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LTC LOC Certification Processing Status


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## CBMS Eligibility Check

Search criteria

First Name	Middle Name	Last Name
<input type="text" value="Julissa"/>	<input type="text"/>	<input type="text" value="Adolphus"/>
Social Security Number	State ID	Client ID
<input type="text" value="523-91-3398"/>	<input type="text"/>	<input type="text"/>
Date of Birth		
<input type="text" value="09/21/1963"/> 		

At least 2 points must be entered when performing a search.



# Eligibility Check

Name	DOB	Case ID	Program	Status	Mailing Address
Julissa Augusta Adolphus	09/21/1963	1B1P7L0	AF	Denied	2229 CHEYENNE AVE PUEBLO 81003 CO
Julissa Augusta Adolphus	09/21/1963	1B1P7L0	CW	Denied	2229 CHEYENNE AVE PUEBLO 81003 CO
Julissa Augusta Adolphus	09/21/1963	1B1P7L0	EX	Discontinued	2229 CHEYENNE AVE PUEBLO 81003 CO
Julissa Augusta Adolphus	09/21/1963	1B1P7L0	FS	Approved	2229 CHEYENNE AVE PUEBLO 81003 CO
Julissa Augusta Adolphus	09/21/1963	1B1P7L0	FT	Denied	2229 CHEYENNE AVE PUEBLO 81003 CO
Julissa Augusta Adolphus	09/21/1963	1B1P7L0	MA	Approved	2229 CHEYENNE AVE PUEBLO 81003 CO

1-6 of 6 records       << < > >>      Page 1 of 1

# Eligibility Check

PEAKPro CCB Tester Sign Out

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PEAKPro

**> INBOX**

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Eligibility Check

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LTC LOC Certification Processing Status

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Account Management

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Upload Documents

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Reports

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Change Type

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## CBMS Eligibility Check

**Contact Info** -

<b>Home Address</b>	<b>Mailing Address</b>	<b>County of Residence</b>
2229 CHEYENNE AVE PUEBLO CO 81003-1428	2229 CHEYENNE AVE PUEBLO CO 81003-1428	Pueblo
<b>Home Phone Number</b>	<b>Cell Phone Number</b>	<b>Email Address</b>
719-555-4500	719-555-4500	

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**Eligibility Info** -

<b>Case #</b>	<b>Redetermination Date</b>	
1B1P7L0	09/30/2024	
<b>Primary MA Category</b>	<b>Status</b>	
HCBS EBD	Pass	
<b>Eligibility Begin Date</b>	<b>Eligibility End Date</b>	<b>Reason</b>
07/21/2011		
<b>Secondary MA Category</b>	<b>Status</b>	
QMB	Pass	
<b>Eligibility Begin Date</b>	<b>Eligibility End Date</b>	<b>Reason</b>
10/01/2013		
<b>Current Med Span Begin Date</b>	<b>Current Med Span End Date</b>	
<b>Disability Diary Date</b>	<b>SSI Eligible</b>	
	No	
<b>Limited to EMS/RHCS</b>	<b>Active POI</b>	
No	No	
<b>Home Care Allowance Amount</b>	<b>NF Patient Payment Amount</b>	
0.00	0.00	

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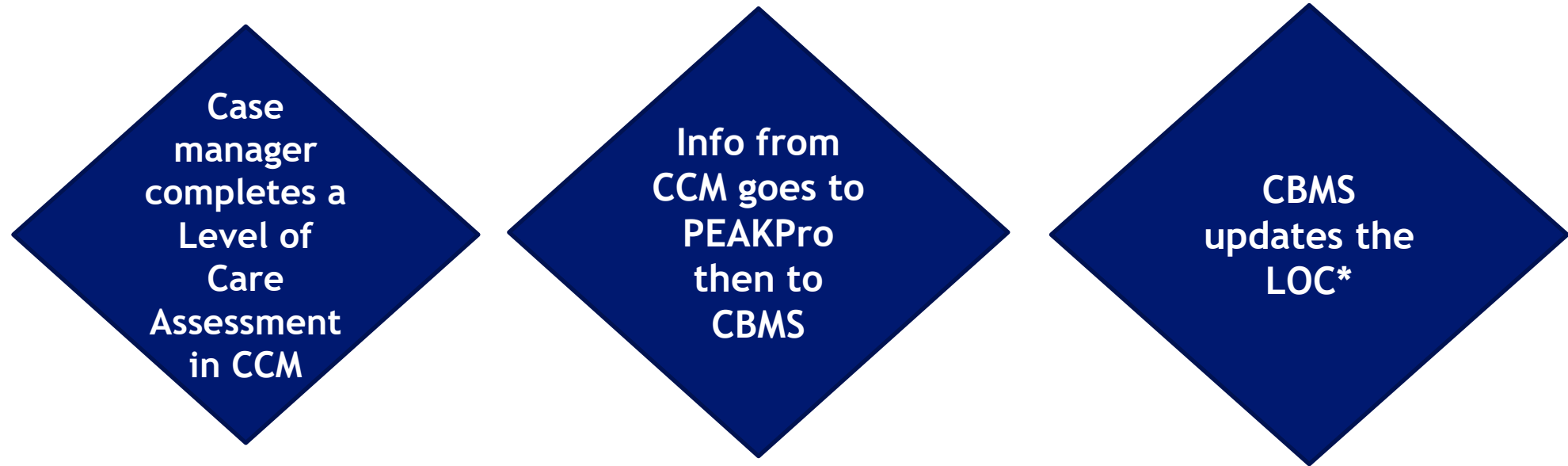
**Income Info** +

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**LTC Level of Care Info** +



# LTC LOC Certification Processing Status



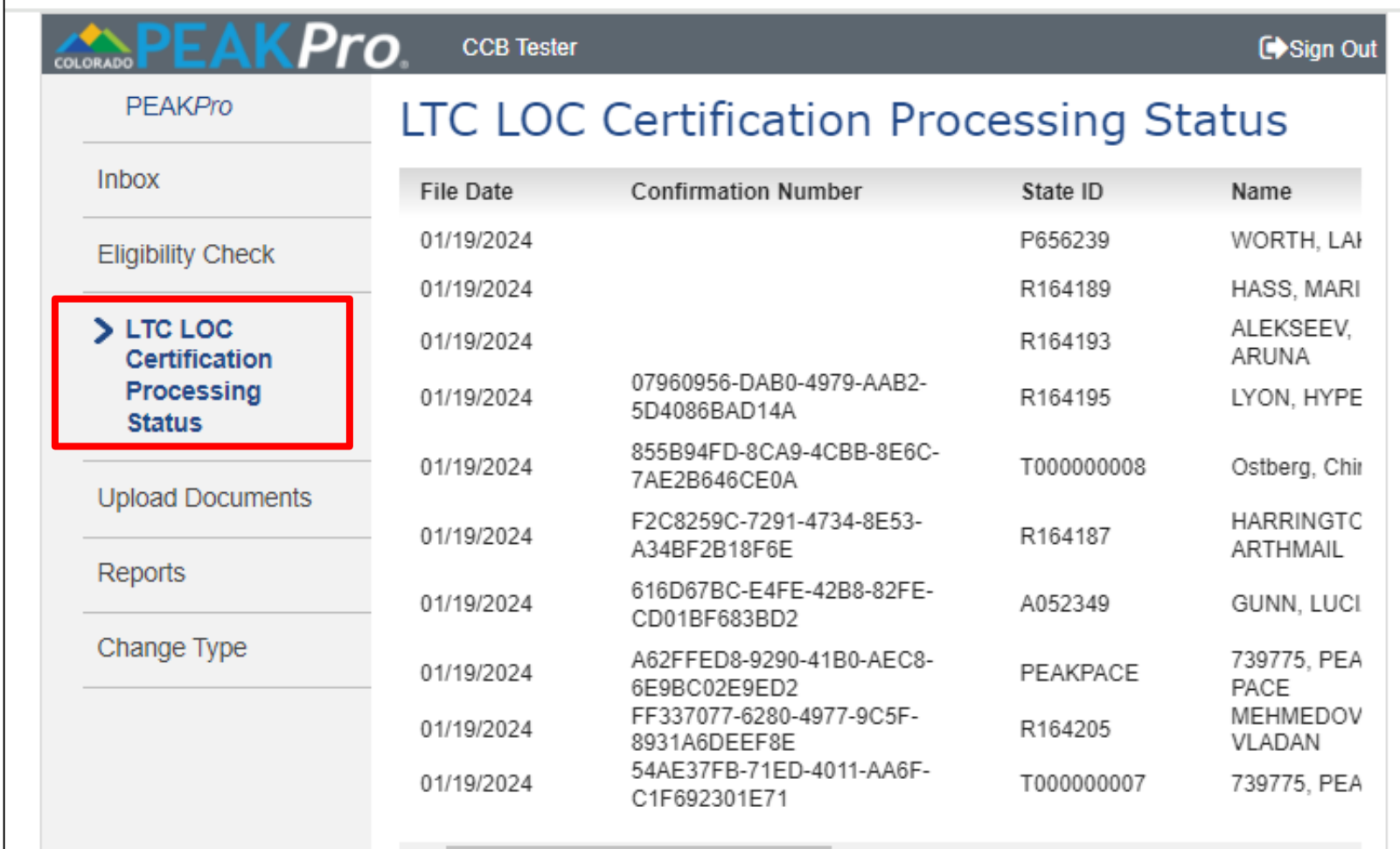
\* Not all Level of Care (LOC) assessments will auto update in CBMS. See slide 21 for reasons why CBMS may not update the LOC



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# LTC LOC Certification Processing Status



PEAKPro CCB Tester Sign Out

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Inbox

Eligibility Check

**> LTC LOC Certification Processing Status**

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## LTC LOC Certification Processing Status

File Date	Confirmation Number	State ID	Name
01/19/2024		P656239	WORTH, LAI
01/19/2024		R164189	HASS, MARI
01/19/2024		R164193	ALEKSEEV, ARUNA
01/19/2024	07960956-DAB0-4979-AAB2-5D4086BAD14A	R164195	LYON, HYPE
01/19/2024	855B94FD-8CA9-4CBB-8E6C-7AE2B646CE0A	T000000008	Ostberg, Chir
01/19/2024	F2C8259C-7291-4734-8E53-A34BF2B18F6E	R164187	HARRINGTC ARTHMAIL
01/19/2024	616D67BC-E4FE-42B8-82FE-CD01BF683BD2	A052349	GUNN, LUCI
01/19/2024	A62FFED8-9290-41B0-AEC8-6E9BC02E9ED2	PEAKPACE	739775, PEA PACE
01/19/2024	FF337077-6280-4977-9C5F-8931A6DEEF8E	R164205	MEHMEDOV VLADAN
01/19/2024	54AE37FB-71ED-4011-AA6F-C1F692301E71	T000000007	739775, PEA



# LTC LOC Certification Processing Status Columns

- **File Date** - date the file was sent through PEAKPro to CBMS
- **Confirmation Number** - LOC confirmation number from the CCM
- **State ID** - member's State ID
- **Name** - member's name
- **SSN** - member's SSN
- **CBMS Case #** - associated CBMS case number

# LTC LOC Certification Processing Status Columns

- **Record Type -**
  - **LOC Determination:** This is set whenever the record includes a LOC determination. This record can also include an address change.
  - **Nursing Facility:** This is set whenever the record includes updated Nursing Facility info and no new or updated LOC determination. This record can also include an address change.
  - **Address Change:** This is set whenever the record includes an Address Change and no new or updated LOC determination or Nursing Facility info.
- **Status -** indicate of whether the LOC updated the CBMS case, see below
  - **Processed:** Set when the member was known to CBMS and currently active or pending for Medical and eligibility has been determined and authorized.
  - **Not Processed:** Set whenever the record was sent to the inbox, or could not be processed through authorization.



# LTC LOC Certification Processing Status Columns

- **Reason** - if Status is “Not Processed” a reason will display here as to why the file was not processed in CBMS - see below.
  - **Unknown to CBMS:** If the member is not known to CBMS, the record cannot post. The record will be sent to the PEAK inbox for the CBMS user to manually data enter. Member will need to submit an application for Medical Assistance.
  - **Known to CBMS - not active or pending:** If the member is known to CBMS, but is not active or pending for an Medical Assistance aid code, the record cannot post. The record will be sent to the PEAK inbox for the CBMS user to manually data enter. Member will need to submit an application for Medical Assistance.
  - **System Exception:** Set for any record submitted but the record could not be posted due to a system issue
  - **Requires manual review:** This is set when an address change is received. CBMS user will need to review the address change and enter manually.



# Resources

- [LTSS Training Page](#)
- [Help Desk Ticket Template](#)
- [3rd party system user access request form](#)
- [PeakPro Multi-factor Authentication \(PingID\)](#)



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# Help Desk Tickets

PEAK Technical Support	Help Desk Ticket Prep	Help Desk Ticket Tips
<p>The PEAK Technical Support team can help you with:</p> <ul style="list-style-type: none"><li>● Reset passwords</li><li>● Error messages</li><li>● Account locks from multiple password attempts</li><li>● PING ID (lost phone, forgot phone, removal of device, etc.)</li></ul>	<p>Before Submitting a Help Desk Ticket:</p> <ul style="list-style-type: none"><li>● Work with your organization contact first. The organization contact will determine if there is a technical issue</li><li>● If it is a technical issue the user should gather the information in the <a href="#">PEAKPro help desk ticket template</a></li><li>● The user should call the Help Desk @ 1-800-250-7741</li></ul>	<p>When Submitting A Help Desk Ticket:</p> <ul style="list-style-type: none"><li>● Add any additional information to the <a href="#">PEAKPro help desk ticket template</a></li><li>● The user should take screenshots of what they are doing in PEAK and the case number they are working on</li><li>● Help Desk tickets <b>will not</b> be accepted without case number and screenshots</li></ul>



# Key Takeaways

- PEAKPro launches 3/1/2024
  - Used for reviewing member financial eligibility and LOC certification processing status
  - Not being used for receipt of referrals at this time

What do you need to do?

- Create your account
- Explore the system
- Check a members eligibility at any time or when prompted by the CCM





# Questions?



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