



Telephonic Signature Enhancements

County Directors & County IT
September 29, 2022



COLORADO

Benefits Management System

Health Care Policy & Financing
Human Services
Office of Information Technology

Implementation Timeline Update

The renewal revamp and end of the PHE necessitate the need for telephonic signature to be in place. HCPF is targeting a March 31, 2023 for full compliance.

- By **October 21**, the State needs each county to formalize which option they will implement
- Counties should think about how they will incorporate recording telephonic signatures into their business processes

Options

1) Use the Google Platform with a @state.co.us account

- No additional costs for Option 2 counties
apx. \$11/month/user for Option 3 counties
- No storage fees (stored within Google and CBMS)

2) NEW! Use your own recording platform

- Based on feedback, new CBMS initiative to allow upload from county recording system into CBMS
- No storage fees (stored within the state administered Hyland Perceptive system)
- This will be implemented in CBMS in the February 2023 build

Outreach

- OIT performed outreach to counties about the 2 options for telephonic signature
 - Option 3 counties provided initial feedback on their preference
 - State Platform/State Google Account or County Recording Platform
- Following today's session each County will be asked to formalize their preference with CBMS OIT by Oct 21

State Google Account



PROS

- CBMS end users will leverage the State Google Hangouts feature for recording (instead of using their own recording system)
- No additional county system would be needed to perform the recording



CONS

- CBMS end users will have 2 different email addresses (state and county). CBMS end users will need to forward state email to county email
- County Security Administrator will need to manage the new state Google accounts
- Financial cost for a state Google Account (apx. \$11 per user per month)

County Records & Uploads Within CBMS

- County uses current recording system (Teams, Zoom, Google Hangouts, etc) to record the telephonic signature
- County uploads to the Signature Screens in CBMS
- County has the ability to download the recording



PROS

- CBMS end users are familiar with their county recording system
- Recordings will be stored within the state administered Hyland Perceptive state content management platform (*unlimited storage)
- No additional financial cost to implement another recording system



CONS

- CBMS end users have CBMS up on one screen and county recording system on other screen to record
- CBMS end users have the additional step of uploading the external recording into CBMS

Demo

In Development

State User: @state.co.us

Telephone Meeting/Signature

Detail

*Type
State.co User

Date Time *E-mail
cdhs_telephonicsignature_user@state.co.us

Calendar

Virtual Meeting Details

Meeting link	Meeting Phone Number	Meeting ID	Meeting Pin
https://meet.google.com/	() -		

Start Meeting

Communication Script

Language English

Hello, my name is Rahul Narra and I will be assisting you in completing your application by obtaining your recorded verbal agreement, also known as a telephonic signature or assent, for your application. This agreement is being recorded and will be kept on file as verification of your signature and confirmation that your application is complete.

I am going to confirm the programs you have applied for and that the information you have provided is correct and accurate.

Please listen carefully. This next part will take about 3 minutes.

In Development

State User: @state.co.us

This is a summary of your requests:

You are applying for the following programs: (SNAP, Colorado Works Adult Financial, Medical Assistance.)

Now I am going to read a list of 8 statements. Please listen carefully to each statement. If you do not understand a statement, please let me know so I can provide additional information.

1. We will send you a copy of your application. You are required to review it and notify us within 10 days if you see anything that is not correct. If you do not contact us, we assume that you agree with everything recorded on the application.
2. With the copy of your completed application, we will include a full description of your Rights and Responsibilities in a section titled "What I Should Know." You agree to review the information and contact your local county office with any questions.
3. You may need to provide proof or verification of your answers to the application questions. By verbally signing this application, we are authorized to contact any person or organization to obtain needed information in order to determine if you can receive benefits.
4. There are penalties for giving false information or breaking the rules. Information about this is provided in the Rights and Responsibilities section titled "What I Should Know."
5. The local office cannot discriminate on the basis of race, color, national origin, sex, age, disability, religious or political beliefs. Your Civil Rights will be upheld.
6. Your private information will be treated confidentially.
7. If you have a disability, you may request information about your case in a different format.
8. You have the right to request a Fair Hearing if you disagree with the agency actions regarding your benefits.

Closing

Thank you for completing the application process. As mentioned, we will be sending you a copy of your application for review and confirmation. Please submit any changes to the Department of Human services within 10 days of receipt. You can find contact information for your local Department of Human Services on the cover letter attached to your application copy.

Telephonic Signature Completed <input type="radio"/> Yes <input type="radio"/> No	Signature captured Select Signature captured ...	Telephonic Signature Date <input type="text"/>
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Cancel Save & New Save


In Development


Non-State.co User

Telephone Meeting/Signature

Detail

*Type
Non-State.co User

*Date 

*Time 

*E-mail [Calendar](#)

Virtual Meeting Details

Meeting link

Meeting Phone Number

Meeting ID

Meeting Pin

[Start Meeting](#)

Communication Script

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I am going to confirm the programs you have applied for and that the information you have provided is correct and accurate.

Please listen carefully. This next part will take about 3 minutes.

[Cancel](#) [Save & New](#) [Save](#)

In Development

Non-State.co User

Your recorded verbal agreement regarding this application for benefits will be treated just like a written signature by the [County Name] Department of Human/Social Services.

NOTE FOR EMPLOYEE READING SCRIPT: FOR THE FOLLOWING QUESTIONS, THE APPLICANT WILL NEED TO ANSWER YES OR NO. "YEAH," "SURE," "OKAY," ETC. CANNOT BE ACCEPTED.

- Do you certify, under penalty of law and perjury, that you understand the statements I just read to you, and that your answers to your application are correct and complete to the best of your knowledge?
- Would you like to sign this application over the phone?

NOTE FOR EMPLOYEE READING SCRIPT: THE APPLICANT MUST CONFIRM (STATE "YES") TO BOTH QUESTIONS ABOVE IN ORDER FOR THE SIGNATURE TO BE ACCEPTED AND THE APPLICATION TO BE COMPLETE.

- Please state your full legal name, today's date, and the current time.

Closing

Thank you for completing the application process. As mentioned, we will be sending you a copy of your application for review and confirmation. Please submit any changes to the Department of Human services within 10 days of receipt. You can find contact information for your local Department of Human Services on the cover letter attached to your application copy.

Telephonic Signature Completed

Yes No

Signature captured

Select Signature captured ...

Telephonic Signature Date



Upload

Cancel

Save & New

Save

In Development

*New View- list telephonic signature recordings saved to State platform (Hylands Perceptive System)

9/26/2022, 12:32 PM - narraxx - STATE OF COLORADO

Search Criteria

Case ID: CBMS Application ID: Telephonic App Tracking #:

Individual Name: Telephonic signature date: Telephonic signature link:

No of records = 1 / Page 1 of 1

Case #	Application #	Telephonic Tracking #	Date	Time	Meeting Url
180Z190	11296786	2	04/04/2022	12:41	https://meet.google.com/wfg-u...

Detail

Type of Appointment:

*Date: *Time: E-meeting:

Virtual Meeting Details

Meeting link: Meeting Phone Number: Meeting ID: Meeting Pin:

Telephonic Signature Completed: Yes No *Signature captured: Telephonic Signature Date:

Google Telephonic Recording

Name	File Id	Created Date
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Hylands Telephonic Recording

Name	File Id	Created Date
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Next Steps

- Accepting a few counties to be part of pilot/testing the CBMS functionality. Any volunteers?
- Contact Joetta Fisher by no later than October 21st to formalize your county's option
- Start thinking about and documenting incorporation of telephonic signature within your business processes



Questions?



