

# Electronic Med-9 Forms: Overview for County Workers

The Division of Economic and Workforce Support (DEWS) oversees the administration of Adult Financial (AF) and Colorado Works (CW) programs in 64 county Human Services departments across the state. The AF programs provide financial grants to low-income aged, blind and/or disabled persons in the state of Colorado. Applicants for Aid to the Needy Disabled-State Only (AND-SO) must meet financial, disability and SSI application requirements for the program. Clients establish a qualifying disability using a Med-9 form that is completed by a licensed professional. For more information on qualifying disabilities, please review the Adult Financial Categories and Special Circumstances web-based training (WBT) in COLearn.

Clients may have a Med-9 form completed manually with a licensed provider or providers can submit an electronic Med-9 form on behalf of the client. The electronic Med-9 form is available on the PeakPro website. The electronic Med-9 is generated from the Colorado Benefits Management System (CBMS) into the PEAKPro provider portal to allow providers to complete and submit it to the county department.

Electronic Med-9 forms can be submitted by providers at any time, and all of the same information contained on the paper Med-9 form is also collected by the electronic Med-9. If the client is known to CBMS and has an AF application that is pending at intake, or if it is within sixty days of their recertification, the Med-9 information will be automatically uploaded the Med-9 related list (highlighted in red) on the Medical Conditions page in CBMS.

The screenshot displays the 'Medical Conditions' page in the CBMS system. The page has a top navigation bar with tabs: Non-Financial, Income, Expenses, Resources, Non-Citizen, Cash Program, Food Program, MA Program, and APTC. Below this is a sub-navigation bar with tabs: Attributes, Case Individual, Case Individual Program Requested, Compliance, Demographics, Household Relationship Details, Medical Conditions (active), Disability Determination, Pregnancy, Residency, Sanctions and POIs, Disqualifications, SSI, and More. The main content area shows a table with columns: Disability Type, Effective Begin Date, and Effective End Date. A row is visible with 'Permanent' as the disability type and '06/01/2022' as the effective begin date. To the right of the table is a sidebar with a list of medical conditions: Treatment Summary, Alcohol/Controlled Substance Use Addiction Summary, Diagnosis, Source of AND Disability, and Med-9. The 'Med-9' item is highlighted with a red border. Below the table, there is a 'Detail' section with fields for Effective Begin Date, Effective End Date, Disability Type, Percent of Disability, Verification, Source, Date Reported, and Date Verified. The 'Med-9' item is also highlighted in red in the sidebar.



If the client is not known to CBMS, or if it is not within sixty days of their next Adult Financial certification period, the electronic Med-9 will be sent to the Program Eligibility Application Kit (PEAK) Inbox to be worked manually by the county worker.

County workers are able to search for electronic Med-9s in the PEAK inbox by selecting one of the two radio buttons, Linked or Unlinked, under Med-9 (highlighted in red) in the search criteria. An unlinked Med-9 is an electronic Med-9 received for a client that is unknown to CBMS or does not have AF active and must only be processed manually. If the individual associated with an unlinked Med-9 later applies for an AF program, an informational message will display in CBMS that states, “There is an unlinked Med-9 for this client in the PEAK inbox.”

Inquire on Individual

Application

Medicare Buy-In Summary Individual Details

PEAK Inbox

ICR Documents

Work Program Hours

Case Information

SSA COLA

Return Mail

Case Address

Case Comments

Provider

EDMS Doc Upload

More

PEAK Inbox Search

PEAK Verif Docs

Search Criteria

Tracking #

\*County

STATE OF COLORADO

User Assigned Status

Assigned

Unassigned

Both

MA LTC Request

User Assigned

Q

Program Type

Select Program Type ...

Med-9

Linked

Unlinked

MA Type

MAGI

Non-MAGI

All

First Name

Last Name

SSN

Case #

AF Late RRR

CW Late RRR

SNAP Late RRR

MA Late RRR

BHA Late RRR

Program(s) Ended

CW Extension

CW child-only

Expedited

Telephonically Signed

MA LOC Certifications

Select MA LOC Certifications ...

MA LOC Cert Type

Admission

CSR

Address Change

RTE Status

Select RTE Status ...

Application Status

Submitted

Application Type

Select Application Type ...

MA LOC Cert Status

New

Updated

Both

Application Source

Select Application Source ...

\*App Submit From Date

05/05/2025

\*App Submit To Date

06/04/2025

Search

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