

Peak Inbox – Filtering for MA LOC Certifications

This desk reference provides directions on how to locate Long-Term Care (LTC) Level of Care (LOC) certifications in the PEAK Inbox that CBMS received from the Case Management Agencies (CMA) via the Care and Case Management (CCM) system feed to PEAKPro/CBMS.

Table: LOC Status/Worker Action, Locate/Filtering Options, Additional Information

LOC Status Worker Action	Locate Filtering Options	Additional Information
MA LOC certification was posted to the LOC screen, but the case must be reviewed by the worker	RTE Status: "EDBC Pending," "EDBC Error," or "Individuals Pending."	The LOC was posted to the LOC screen, but there were errors encountered by EDBC and/or at authorization. This may have resulted in EDBC running offline and/or have a pending status.
Requires Manual Entry and Review of MA LOC certification by worker	RTE Status: "II Incomplete"	CBMS RTE is trying to process the LOC record, however, the LOC fails due to overlapping LOC records.

LOC Status Worker Action	Locate Filtering Options	Additional Information
Individual is unknown to CBMS or not active or pending MA and will need to apply for MA	Application Type: "LOC Cert"	<ul style="list-style-type: none"> The LOC should not be entered until an application for MA is received. Ensure users are searching the correct date range. <i>In addition to updating the county to "State of Colorado" also try searching by the member's first name, last name and/or SSN. Ensure you update the date range in the "App Submit From Date" and "App Submit To Date" to the date range you are searching for. Finally, from the "Application Status" field, remove the status of "Submitted."</i>
MA LOC Certification (drop down)	HCBS	HCBS LOC that was received after 10/12/2024 (Effective date of logic and functionality updates to CBMS, PEAK and PEAKPro related to MA LOC certifications.)
MA LOC Certification (drop down)	PACE	PACE LOC that was received after 10/12/2024
MA LOC Certification (drop down)	Nursing Facility	Nursing Facility LOC that was received after 10/12/2024
MA LOC Certification (drop down)	All	<ul style="list-style-type: none"> Will show all HCBS, PACE, and Nursing Facility LOCs All MA LOC Certifications received in the PEAK Inbox prior to 10/12/2024 will be categorized as "All"
MA LOC Cert Type (radio button)	Admission	Reserved for new NF LOCs where the previous LOC was not NF or if there is a gap in dates between the previous and new NF records

LOC Status Worker Action	Locate Filtering Options	Additional Information
MA LOC Cert Type (radio button)	CSR (Continued Stay Review/Reassessment)	For any type of LOC where there is a previous matching LOC record and there is no gap in dates between the previous and new record
No worker action needed: The MA LOC posted to the LOC screen and the member's eligibility was processed and authorized	RTE Status: "Auth Success"	<ul style="list-style-type: none"> • LOC Certification was processed and authorized. • Follow your current eligibility site processes regarding saving the LOC certification to the case file.

Other LOC Status/Worker Action Situations

1. There may be multiple spellings for a member that do not match between CBMS and CCM so the worker will need to search the PEAK Inbox for variations.
 - a. Example: Last name Allen, case manager entered it as Alen, so the worker would need to search the PEAK Inbox by both spellings.
 - i. In cases like these it may be helpful for the worker to request the CMA provide the full name and any suffixes exactly how it is listed on the LOC in case there are any misspellings between CCM and CBMS. If the person is a Sr. or Jr, or III, that suffix should be added in the last name field to search for the member. Additionally, members who have the same name or share the same birthdate (like twins or triplets), may not match, causing the LOCs to be sent to the inbox. It is important to ensure the LOC is entered on the correct individual by the worker.
2. Address Change (checkbox)
 - a. If selected, results will show address changes received from the CMA/CCM without an LOC

Quick Tip

If the LOC cert cannot be found in the PEAK Inbox and the CMA has provided a confirmation number and the transmit date, then the worker should submit an HDT. Ensure the CMA has verified the LOC in PEAKPro when providing the confirmation number and transmit date.

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