

Electronic Med-9 Forms: Overview for County Workers

The Employment and Benefits Division (EBD) 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.

The complete Med-9 training for providers, “PeakPro Electronic Med-9 Form: Provider Training” can be found in [TrainColorado.com](https://traincolorado.com)

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 into the Medical Conditions Screen in CBMS.

The screenshot shows a web-based form titled "Medical Conditions" with a blue header bar. The form is organized into several sections:

- Detail:** Includes "Effective Begin Date" and "Effective End Date" fields with calendar icons.
- EED Verification:** Includes a dropdown menu "Select EED Verification ...".
- EED Source:** Includes a dropdown menu "Select EED Source ...".
- Ability to Work:** Includes radio buttons for "Yes" and "No", a dropdown menu "Select Disability Type ...", and a "Percent of Disability" input field.
- Begin Date:** Includes a date field with a calendar icon.
- End Date:** Includes a date field with a calendar icon.
- RFCSM Score:** Includes a greyed-out input field.
- Qualifying Disability:** Includes a dropdown menu "Select Qualifying Disability ...".
- Disability Indicator:** Includes a dropdown menu "Select Disability Indicator ...".
- Notes for Qualifying Disability:** Includes a large text area for notes.
- Social Factors:** Includes a dropdown menu "Select Social Factors ...".
- Notes for Social Factors:** Includes a large text area for notes.

At the bottom right of the form, there are buttons for "Cancel", "Save & New", "Save & Continue", and "Save". A small "0/512" character count is visible in the bottom left corner of the form area.



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 the Med-9 checkbox (highlighted in red) in the search criteria. If the individual associated with that 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".

The screenshot shows the 'PEAK Inbox Search' interface. The search criteria are as follows:

- Tracking #: [Empty]
- Program Type: [Select Program Type...]
- AF Late RRR:
- Program(s) Ended:
- First Name: [Empty]
- RTE Status: [Select RTE Status...]
- Application Source: [Select Application Source...]
- *County: ADAMS
- Expedited:
- CW Late RRR:
- CW Extension:
- User Assigned Status: Assigned Unassigned Both
- Telephonically Signed:
- *MED 9: (highlighted in red)
- *APP Late RRR:
- SSN: [Empty]
- Application Status: Submitted
- Application Type: [Select Application Type...]
- *App Submit From Date: 07/23/2022
- *App Submit To Date: 08/22/2022

Navigation bar below search criteria:

- App Type
- Tracking #
- User Assigned
- Program(s) R...
- Program(s) A...
- Program(s) E...
- RRR Program...
- RTE Case #
- Non RTE Case #
- RMC Case #
- Expedited SN...
- ACP
- App Submit ...

Buttons below navigation bar:

- Assign a User
- Download
- Queue
- Invalidate
- View PDF
- Manual Process
- Process Application
- Inside CBMS Supportive Services
- Outside CBMS Supportive Services
- Review Handwriting

