<Date>

<CDASS Client/AR Name>

<Address>

<City, State ZIP>

RE: Notice of CDASS Overutilization

Dear <Client/AR Name>,

This letter is to summarize the conversation and agreement we had on <DATE>.

I have reviewed your CDASS Monthly Member Expenditure Statement (MMES) for <MONTH/YEAR>, which shows that you have spent <$X,XXX>, which is ten percent (10%) or more than your approved average Monthly Allocation. Your approved Average Monthly Allocation is <$X,XXX> for certification period ending <MM/DD/YYYY>.

Due to the over expenditure you are required to participate in further CDASS training provided by Consumer Direct of Colorado. During this retraining you will learn how to better manage your allocation, how taxes are paid, and be provided with personalized assistance, if needed, to recoup overspent funds. You will also be able to ask any questions you may have around budgeting or other CDASS components. I will be sending a referral for additional CDASS training and you will be contacted by Consumer Direct of Colorado to schedule a time for this mandatory retraining to occur.

You have also agreed to budget within a reduced Average Monthly Allocation of <$X,XXX> for the month(s) of <MONTH> and <MONTH> YYYY, to resolve this occurrence of overutilization.

If you fail to comply with these terms and/or continue to overutilize CDASS services, you will be terminated from the CDASS program. In accordance with 10 CCR 2505-10 8.510.13.A you may ultimately be terminated from CDASS if you fail to comply. Therefore, if you are unable to manage your own care within these terms please consider designating an Authorized Representative (AR) or a new Authorized Representative (AR) if one is already assigned.

Keep in mind that CDASS is not necessarily the best option for all clients who meet eligibility and I am happy to work with you to select another option for care.

If you have any questions, my office hours are <insert hours.>. If you call and I am not available, please leave a voicemail message and I will return your call as soon as I can.

Sincerely,

Care Manager

Case management agency

(303) XXX-XXXX