

How to Create a CPA for Brokerage Enrollments (CDDP Instructions)

To successfully enroll an individual with a Brokerage in eXPRS to receive Adult Support Services, two CPAs are required:

- a SE48 CPA from the individual's CDDP designating the Brokerage agency, and
- a SE148 CPA from the Brokerage

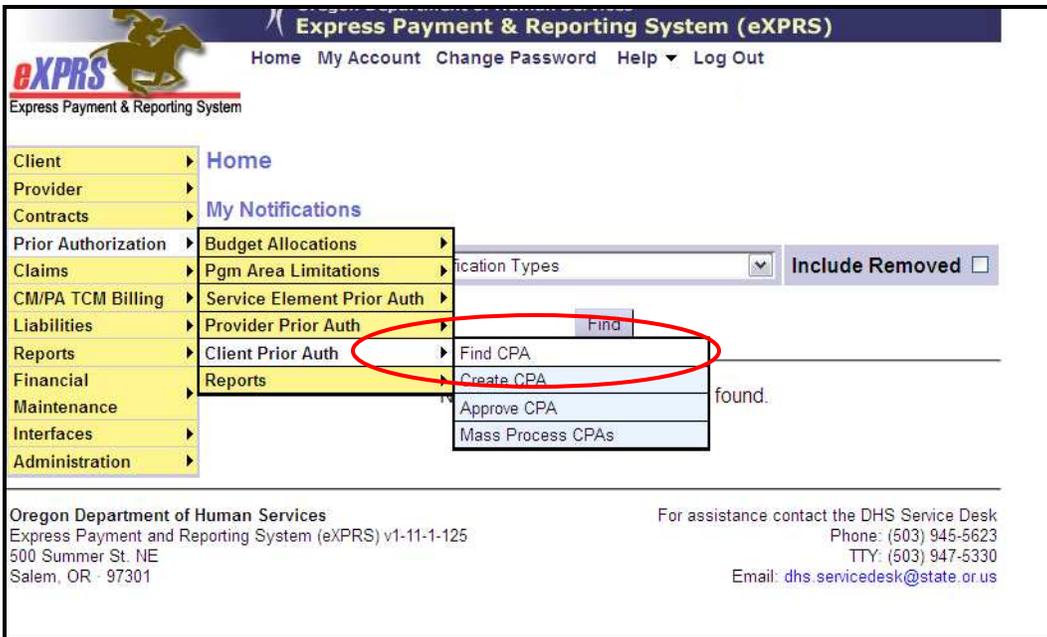
Prior to completing any CPA work, the CDDP and the brokerage must communicate and agree on the individual's enrollment (or start) date of their services with the Brokerage.

Once that enrollment (or start) date has been determined, the CDDP must submit the enrollment information and additional forms to the DDPTAU via the Eligibility & Enrollment pages/process in eXPRS. A completed and signed TXIX Level of Care form may also need to be submitted (if not already done so) to the with the Eligibility Enrollment record information.

The SE48 CPA from the CDDP which identifies and designates the Brokerage the individual is to receive their Adult Support Services from is required in eXPRS before the Brokerage SE148 CPA work can be completed. ***All SE48 CPAs that designate a Brokerage must be created using the SE48 "TCM" (non-waiver CM) procedure code.*** If the individual has requested and is eligible to receive Waiver Case Management (WCM) services from the Brokerage, then the Brokerage's SE148 CPA will be the one to use the "WCM" procedure code.

The CDDP must first end their current SE48 CPA (if they have one). Follow the instructions below to do this:

1. Login to eXPRS. You must have the CM CPA Manager role to do this work.
2. From the **yellow** left-hand navigation menu, click **PRIOR AUTHORIZATION**
→ **CLIENT PRIOR AUTH** → **FIND CPA**.



This will take the user to the [Find Client Prior Authorization](#) page.

- In the [Find Client Prior Authorization](#) page, enter enough information in the search criteria to find the current SE48 CPA for the individual who is moving to Adult Support Services.

TIP: If you know the individual’s Prime Number, enter that in the **CLIENT PRIME NUM** field, select one of the “48” options from the **SERVICE ELEMENT** drop down field, and click **FIND**. That will take you directly to their SE48 CPA.

- Just the number “48” will give you ALL SE48 CPAs (both Waiver and non-Waiver CM CPAs).
- 48 (TCM/ALL) will give you the “non Waiver Case Management” CPAs for SE48
- 48 (WCM/All) will give you the “Waiver Case Management” CPAs for SE48.

Express Payment & Reporting System (eXPRS)

Home My Account Change Password Help Log Out

Express Payment & Reporting System

Client Find Client Prior Authorization

Provider

Contracts

Prior Authorization Enter one or more search criteria. Only exact matches are supported. Results returned are limited to 20,000 rows.
Note: If criteria entered results in more than 20,000 rows, data returned will be truncated. You may need to narrow your search criteria to return a smaller dataset.

Plan Of Care

Claims

CM/PA TCM Billing

Liabilities

Reports

Financial

Maintenance

Interfaces

Administration

Prior Auth Ref Num:

CPA Adj #:

Provider ID:

Client Prime: XXX1234A

Status:

Service Element: 48

DHS Contract Num: 48 (All/All) - Specialized Services in NF

Service Location: 48

Units: 48 (TCM/All) - Targeted Case Management
48 (WCM/All) - Waivered Targeted Case Management
50 (WCM/All) - Residential Facilities

Effective Date: 51 (All/All) - Supported Living Services

End Date: 52 (All/All) - Host Homes

Max Displayed: 53 (TRFFS/All) - DD Non-Medical Transportation

Ongoing: 54 (All/All) - Employment & Community Inclusion

Show Notes: 141 (All/All) - State Operated Community Program
142 (All/All) - Children's Residential
143 (All/All) - Proctor Care
148
148 (PATCM/All) - Personal Agent Services
148 (PAWCM/All) - Waivered Targeted Case Management
149
149 (A9999) - Misc DME supply or accessory, not otherwise specified
149 (OR003) - Service Related Transportation, Commercial
149 (OR004) - Service Related Transportation, Mileage

Oregon Department of Human Services
Express Payment and Reporting System (eXPRS) v2-0-0-70
500 Summer St. NE
Salem, OR 97301

Phone: (503) 945-5623
TTY: (503) 947-5330

- From the results list, click on the **blue hyperlink number** in the **CPA Adj #** column to open the individual's SE48 CPA you need to end.
- With the selected CPA open, scroll to the bottom and click **EDIT** at the bottom of the CPA to open the CPA.

Unit Type: Days

Units: 1

Rate: \$174.14

Created By:

Created Date: 7/3/2013

Updated By: System Maintenance

Updated Date: 8/15/2013

Notes: 07/03/2013 - rollover Created for 13-15
07/03/2013 - Case Management
CPA cannot be submitted without an accepted Provider
Prior Auth in place

Click **EDIT** to open the CPA

Edit Void Copy Cancel Previous

Action Log Entries

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For assistance contact the DHS Service Desk
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Email: dhs.servicedesk@state.or.us

6. With this CPA edit fields open, you can now end the individual's current SE48 CPA.
- Enter the correct **END DATE**. (*The **END DATE** will be the day before the agreed upon start date of their brokerage services. For example, if the individual is to start services with the brokerage on 11/1/13, the end date of their current SE48 CPA would be the day before: 10/31/13.*)
 - Change the **ONGOING** code to "N".

The screenshot shows a software interface for editing a CPA. A large blue number '5' is on the left. The form includes fields for 'Effective Date' (7/1/2013), 'End Date' (10/31/13), and 'Ongoing' (N). A dropdown menu for 'End Reason Code' is highlighted with a red box and a callout that says 'That will trigger the End Reason Code dropdown to appear.' Another callout points to the 'End Date' field, stating 'Change the End Date to the last day of CDDP CM services.' A third callout points to the 'Ongoing' dropdown, stating 'Change the Ongoing flag to "N" or no.' Below these fields are 'Unit Type' (Days) and 'Units' (1). A 'Notes' section contains two entries: '07/03/2013 - Created for 13-15 rollover' and '07/03/2013 - Case Management CPA cannot be submitted without an accepted Provider Prior Auth in place'. At the bottom are 'Save' and 'Cancel' buttons.

This will prompt the system to ask you for an **END REASON CODE**. Select the appropriate **END REASON CODE** from the dropdown menu. For individuals moving to Adult Support Service brokerages, you would select "**Transferred to Brokerage**".

Rate and Duration of Services:

Effective Date: 7/1/2013 End Date: 10/31/13 Ongoing: N

End Reason Code: [Dropdown]

Unit Type: [Dropdown]

Rate: 174.14

Notes:

- Created for 13-15 rollover
- Case Management CPA
- and Provider Prior Auth in place

Add Notes:

- Client Refused Services
- Deceased
- Ineligible for DD Services
- Involuntary Withdraw-NoContact/Unavail
- Left Brokerage Services
- Moved out of State
- Moved to Comprehensive Services
- Prime Number Updated
- Redetermine eligibility - Client 18
- To align with service eligibility codes
- Transferred to APD
- Transferred to Another Brokerage
- Transferred to Another County
- Transferred to Another State System
- Transferred to Brokerage
- Transferred to MH
- Transition Allotment to RFFS
- Voluntarily Left System
- Voluntary Withdraw-Dissatisfied w/Srvcs

Save Cancel

7. Click **SAVE** to close the CPA with those changes made.

8. To create a new CPA to add the Brokerage assignment, click **COPY** on the CPA you just saved.

Rate and Duration of Services:

Effective Date: 7/1/2013 End Date: 10/31/2013 Ongoing: N

End Reason Code: Transferred to Brokerage

Unit Type: Days Units: 1 Rate: \$174.14

Created By: Created Date: 7/3/2013

Updated By: Test Test Updated Date: 10/11/2013

Notes:

- 07/03/2013 - rollover
- 07/03/2013 - CPA cannot be submitted without accepted Provider Prior Auth in place

Click **COPY** to create a new draft copy CPA you can edit.

Edit Void Copy Cancel Previous

▶ **Action Log Entries**

Department of Human Services
 Reporting System (eXPRS) v2.0-0-107

For assistance contact the DHS Service Desk
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 TTY: (503) 947-5330
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This will make a copy of the current CPA so you don't have to create the new one completely from scratch. This new COPY CPA will be in **"draft"** status

The CDDP must now create a NEW SE48 CPA with the appropriate Brokerage designated. Follow instructions below to do this:

9. In the new **"draft"** CPA, click **EDIT** to open it to edit.

The screenshot shows a web application interface for managing CPA (Contract Performance Agreement) records. A large blue number '5' is overlaid on the left side of the screen. The main content area displays the following information:

Rate and Duration of Services:		
Effective Date:	7/1/2013	End Date: 10/31/2013
End Reason Code:	Transferred to Brokerage	
Unit Type:	Days	Units: 1
Rate:	\$174.14	
Created By:	Test Test	Created Date: 10/11/2013
Updated By:	Test Test	Updated Date: 10/11/2013

Below the table, there is a red callout box with the text: "Click **EDIT** to open the CPA for edits/changes." A red arrow points from this callout box to the **Edit** button in the navigation bar.

The navigation bar contains the following buttons: **Edit**, **Submit**, **Copy**, **Cancel**, and **Previous**.

At the bottom of the screen, there is a footer section with the following text:

Department of Human Services
eXPRS Reporting System (eXPRS) v2-0-0-107

For assistance contact the DHS Service Desk
Phone: (503) 945-5623
TTY: (503) 947-5330
Email: dhs.servicedesk@state.or.us

10. Click **PREVIOUS** several (3 to 4) times to back you up into Section 3 of the **"draft"** CPA.

11. Once in Section 3 of the “draft” CPA, click **NEXT** to open more fields in Section 3.

2 Service to be Provided:
Service Element: 48 Proc Code: TCM Svc Modifier Cd: All

3 Provider of Service:
Provider ID: Case Management Provider **Next**

4 DHS Contract Funding Services:

5 Date and Duration of Services:

Click **PREVIOUS** several times to move up to Section 3.

When the CPA looks like this, click **NEXT** to open Section 3 fields for edits.

Next Previous Delete Cancel

12. With the fields open in Section 3, select the brokerage the individual is being assigned to from the dropdown menu next to **ASSIGNED BROKERAGE**.

2 Service to be Provided:
Service Element: 48 Proc Code: TCM Svc Modifier Cd: All

3 Provider of Service:
Provider: Case Management Provider Provider ID:
Address: Phone:
City/State:
Service Area: Case Management Provider SE48 TCM (7/1/20
Brokerage Request Date:
Assigned Brokerage: CDDP CM only **Next**

Select the Brokerage the client is transferring to from the Assigned Brokerage dropdown.

Assigned Brokerage:	CDDP CM only
	<ul style="list-style-type: none"> - INCLUSION INC /Case Mgmt Prov - SELF DETERMINATION RESOURCES INC /Case Mgmt Prov - CHILD YOUTH & FAMILY INTEGRATED SVC NTWK /CMP - RESOURCE CONNECTIONS OF ORE /Case Mgmt Prov - CREATIVE SUPPORTS INC /Case Mgmt Prov - EASTERN OR SUPPORT SVCS BROKERAGE /Case Mgmt Prov - Southern Oregon Regional Brokerage /Case Mgmt Prv - FULL ACCESS /Case Mgmt Prov - The Arc of Multnomah Clackamas /Case Mgmt Prov - NW Community Connection dba INW /Case Mgmt Prov - Mentor OR Metro /Case Mgmt Prov - Mentor OR Mid Valley /Case Mgmt Prv - Community Pathways Inc /Case Mgmt Prov - United Cerebral Palsy /Case Mgmt Prov

13. Click **NEXT**.

14. Confirm the correct **DHS Contract** info is showing in Section 4. Select the correct contract number, if not. Click **NEXT**.

Service Area:		Assigned Brokerage:	INCLUSION INC /Case Mgmt Prov
Brokerage Request Date:			
DHS Contract Funding Services:			
4	DHS Contract Num:	<input type="text"/> County <input type="button" value="Next"/>	

15. Once in Section 5, you can now enter the **EFFECTIVE DATE** (the first day of service) of the individual's services with the Brokerage. This is the start date you agreed on with the Brokerage.

16. Confirm the **END DATE** as the last day of the current contract period. Enter this date if not pre-filled in.

17. Confirm the **ONGOING** code is "Y". Select, if not.

5

Rate and Duration of Services:

Effective Date: 11/1/13 End Date: 6/30/15 Ongoing: Y

Enter the first day of Brokerage service here.

Enter the last day of the contract period here, and select "Y" for Ongoing.

Next Previous Delete Cancel

18. Click **NEXT**. Add any notes, if you wish, in the ADD NOTES field, or leave blank. Click **NEXT** a second time.

5

Unit Type: Days Units: 1 Rate: 174.14

Notes:

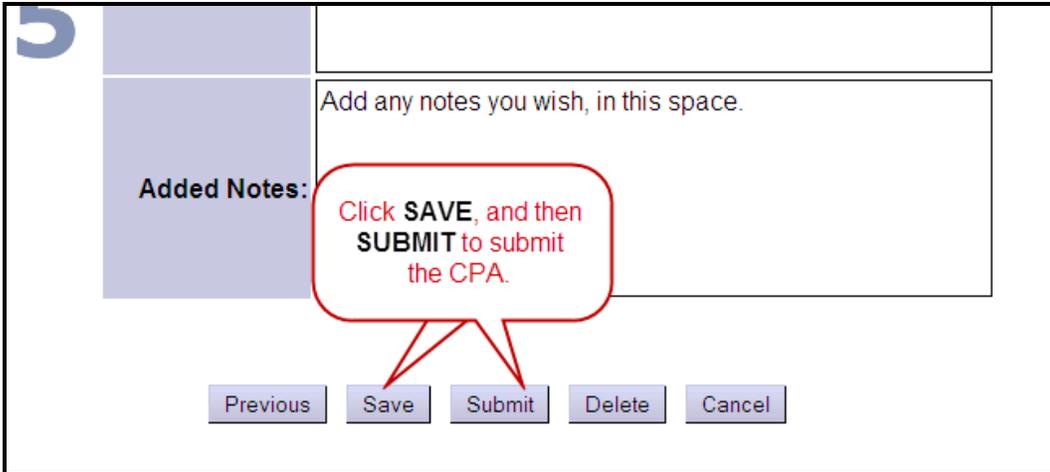
Add notes here, if you like.

Add any notes you wish, in this space.

Click NEXT.

Next Previous Delete Cancel

19. Click **SAVE** to save the CPA. Click **SUBMIT** to submit the CPA.



You may only have permissions to SAVE, but not Submit. If that is the case, then notify the person at your organization who has the CPA Manager role to submit the CPA.

Once this work is completed, the brokerage can now complete their CPA work in eXPRS.