

Creating a Case Management CPA for Brokerage Enrollments

CDDP Instructions

To successfully enroll an individual with a Brokerage in eXPRS to receive Adult Support Services, two (2) separate Case Management CPAs are required:

- A Case Management (SE48) CPA from the individual's CDDP designating the Brokerage agency the individual has chosen, **and**
- A Case Management (SE148) CPA from that Brokerage

Prior to completing any Case Management 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 should complete & submit any enrollment information, as needed, via the Eligibility & Enrollment pages/process in eXPRS.

The SE48 Case Management CPA from the CDDP which designates the Brokerage is required in eXPRS *before* the Brokerage SE148 Case Management CPA work can be completed.

Effective 7/1/17: The Case Management CPA procedure codes are now:

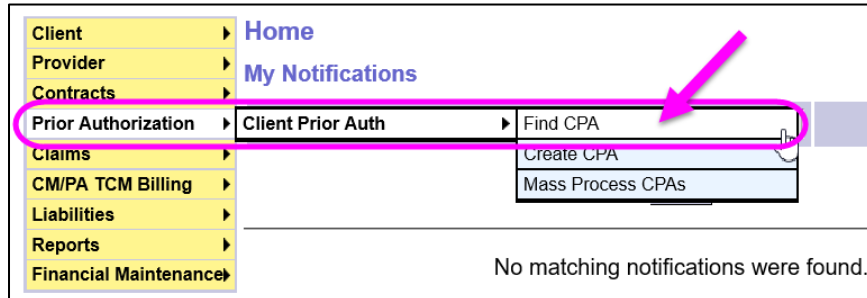
- SE48 CDDP Case Management: **ORCCM**
- SE148 Brokerage Case Management: **ORBCM**

If the individual is currently enrolled with a CDDP, the CDDP *must first* end that current SE48 (and any other service CPAs and/or POCs first).

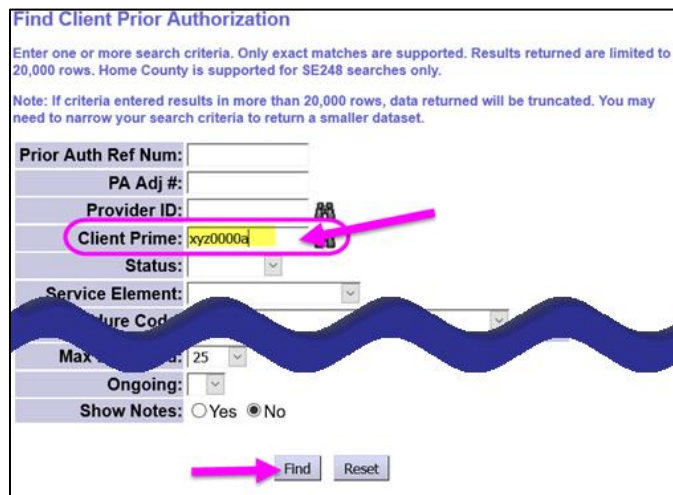
To do the following work, a user must have the **CPA Manager** role.

Ending an Existing SE48 CPA

1. While logged in as the **Case Management Provider (Provider)**, Select **Prior Authorization > Client Prior Auth > Find CPA**.



2. Enter search criteria fields to find the current SE48 CM CPA for the individual



Tip: Using only the individual's Prime Number will return all the CM CPAs for them.

3. From the results list, open the CA by clicking the hyperlink number in the **PA Adj #** column.

PA Adj #	Client Prime	Client Name	Service Element	Proc Code	Svc Modifier Cd	Units	DHS Contract Num	Provider ID	Effective Date	End Date	Rate	Amount	Status	Ong
15*****7	xyz0000a	QXRZXA, YXCCBUXA BHX	48	ORCCM	All	1.00			7/1/2017	12/31/2017	\$237.81	\$43,757.04	Accepted	N
19*****0	xyz0000a	QXRZXA, YXCCBUXA BHX	48	ORCCM	All	1.00			1/1/2018	6/30/2019	\$299.43	\$194,769.12	Accepted	Y

4. On the authorization, scroll to the bottom and select **Edit**.

Rate and Duration of Services:

Effective Date:	1/1/2018	End Date:	6/30/2019	Ongoing:	Y
End Reason Code:	Rate Change				
Unit Type:	Days	Units:	1.00	Rate:	\$299.43
Created By:		Created Date:	12/8/2017		
Updated By:		Updated Date:	12/8/2017		
Notes:	12/08/2017 - : Rate Change				

5

Edit **Void** **Copy** **Cancel** **Previous**

5. While in edit mode, you can enter an End date for the SE48 CPA and change the Ongoing Code to "N".

- In the example below, the individual is set to start services with the brokerage on 7/1/2018, so the end date of the current CPA would be the day before: 6/30/2018.

Rate and Duration of Services:

Effective Date:	7/1/2017	End Date:	6/30/2018	Ongoing:	N
End Reason Code:	[Dropdown]				
Unit Type:	Days	Units:	1	Rate:	
Notes:	[Empty]				
Add Notes:	[Empty]				

5

Save **Cancel**

Change the End Date to the last day of CDDP CM services.

Change the Ongoing flag to "N" or no.

That will trigger the End Reason Code dropdown to appear.

6. Select the appropriate **End Reason Code** from the dropdown menu. For example, when an individual moves to a brokerage, choose **“Transferred to Brokerage”**.

A screenshot of a software interface showing a dropdown menu for 'End Reason Code'. The menu is open, displaying a list of options. The option 'Transferred to Brokerage' is highlighted. To the left of the dropdown, there are labels for 'End Reason Code:', 'Unit Type:', 'Notes:', and 'Add Notes:'. A large blue number '5' is overlaid on the left side of the dropdown. At the bottom of the dropdown, there is a 'Save' button.

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

Creating a new SE48 CPA Designating a Brokerage

1. On the CPA that was just ended, select **Copy**.

A screenshot of a software interface showing a form for a CPA. The form has fields for 'Created By:', 'Created Date:', 'Updated By: Test Test', and 'Updated Date:'. There is a 'Notes:' field. At the bottom of the form, there are buttons for 'Edit', 'Void', 'Copy', 'Cancel', and 'Previous'. A red callout box points to the 'Copy' button with the text: 'Click COPY to create a new draft copy CPA you can edit.' A large blue number '5' is overlaid on the left side of the form.

2. In the new **“draft”** CPA, click **Edit** to open it to edit.

A screenshot of a software interface showing a form for a CPA. The form has a 'Notes:' field. At the bottom of the form, there are buttons for 'Edit', 'Submit', 'Copy', 'Cancel', and 'Previous'. A red callout box points to the 'Edit' button with the text: 'Click EDIT to open the CPA for edits/changes.'

3. Select **Previous** until Section 3 of the draft CPA opens. Once in Section 3 CPA, select **Next** to open more fields in Section 3.

4. In the **Assigned Brokerage** menu, select the brokerage being designated. Then click **Next**.

5. In Section 4, select the correct **DHS Contract Num.** Then click **Next**.

6. In Section 5, enter the **Effective Date** of the individual's services with the Brokerage. This is the start date you agreed on with the Brokerage. Confirm the **End Date** is the last day of the current contract period. Enter this date if not pre-filled in. Confirm the **Ongoing** code is "Y".

Rate and Duration of Services:

5 Effective Date: End Date: 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

7. Click **Next**. Add any notes, if you wish, in the **Add Notes** field, or leave blank. Click **Next** a second time.

5 Notes:

Add notes here, if you like.

Add any notes you wish, in this space.

Click NEXT.

Next Previous Delete Cancel

8. Click **Save** to save the CPA. Click **Submit** to submit the CPA.

5 Added Notes:

Add any notes you wish, in this space.

Click SAVE, and then SUBMIT to submit the CPA.

Previous Save Submit Delete Cancel

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