

## **How to Create a CPA for Brokerage Enrollments (Brokerage Instructions)**

To 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.

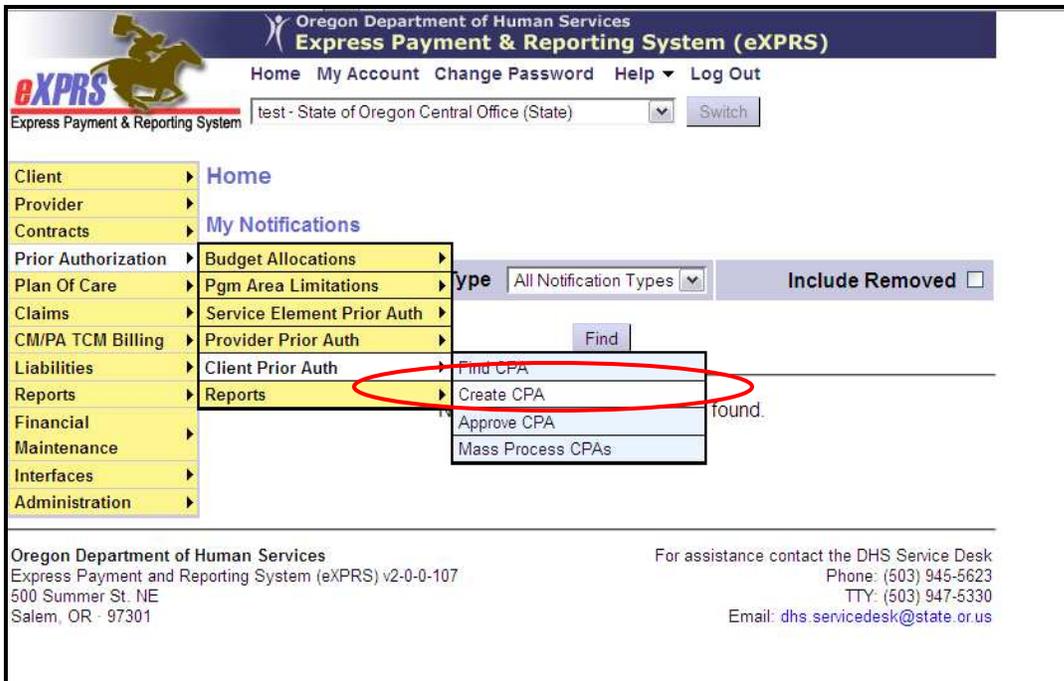
Prior to completing any CPA work, the CDDP and the Brokerage must communicate and agree on the individual's enrollment (or start) date of their services with the brokerage.

The SE48 CPA from the CDDP that designates the brokerage the individual is to receive their Adult Support Services from is required in eXPRS first.

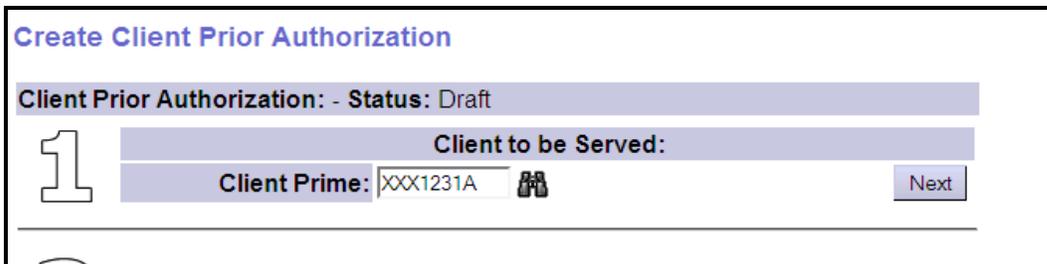
Once the CDDP completes their CPA work, the Brokerage can create their SE148 CPA. Follow the below instructions to do this:

As of 7/1/13, ODDS has implemented an additional type of case management service called Waiver Case Management. Please see the "***How to Create a Waiver Case Management (WCM) Client Prior Authorization (CPA) in eXPRS for SE48 and SE148 services***" help guide for more information.

1. Login to eXPRS. You must have the ***PA CPA Manager*** role to do this work.
2. From the **yellow** left-hand navigation menu, click ***PRIOR AUTHORIZATION → CLIENT PRIOR AUTH → CREATE CPA***. This will take you to the CPA creation window.



3. In the **Create Client Prior Authorization** page, in Section 1, enter the prime number for the client in the **Client Prime** field. Click **NEXT**. This will auto-fill in the client's name and move you to Section #2.



4. In Section 2, select "148" from the **Service Element** dropdown menu. Then select the applicable service procedure code (as shown in the table above) for the service the client is enrolling in to from the **Proc Code** dropdown. Click **NEXT** to move to Section #3.
  - **PATCM** = Personal Agent Non-Waiver Case Management services
  - **PAWCM** = Personal Agent WAIVER Case Management services

2 Service to be Provided:

Service Element: 148 Proc Code: PATCM  
PAWCM Svc Modifier Cd: All Next

3 Provider of Service:

- In Section 3, select the provider of the service from the **Provider ID** dropdown. This will be your Brokerage Case Management provider number.

2 Service to be Provided:

Service Element: 148 Proc Code: PAWCM Svc Modifier Cd: All

3 Provider of Service:

Provider ID: /Case Mgmt Prov Next

- Click **NEXT**.
- This will open up additional fields in Section 3 for you to complete. In the Service Area box, select the **location of the Brokerage office** that the client's Personal Agent will be working from. You may only have one choice.

2 Service to be Provided:

Service Element: 148 Proc Code: PAWCM Svc Modifier Cd: All

3 Provider of Service:

Provider: /Case Mgmt Prov Provider ID:

Address: Phone:

City/State:

Service Area: /Case Mgmt Prov SE148 Statewide (7/1/2009 to 12/31/9999) Next

- Click **NEXT** to move to Section #4.
- In section 4, select the applicable contract authorizing the service from the **DHS Contract Num** dropdown.

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**DHS Contract Funding Services:**

DHS Contract Num:

10. Click **NEXT** to move to Section #5.

11. In Section 5, enter the **Effective Date** (aka: the start date) and **End Date** of the service in the fields provided. Then select “Y” or “N” in the **Ongoing** dropdown.

5

**Rate and Duration of Services:**

Effective Date:   End Date:   Ongoing:

12. Click **NEXT**. This will open the notes field. Feel free to add any notes you wish.

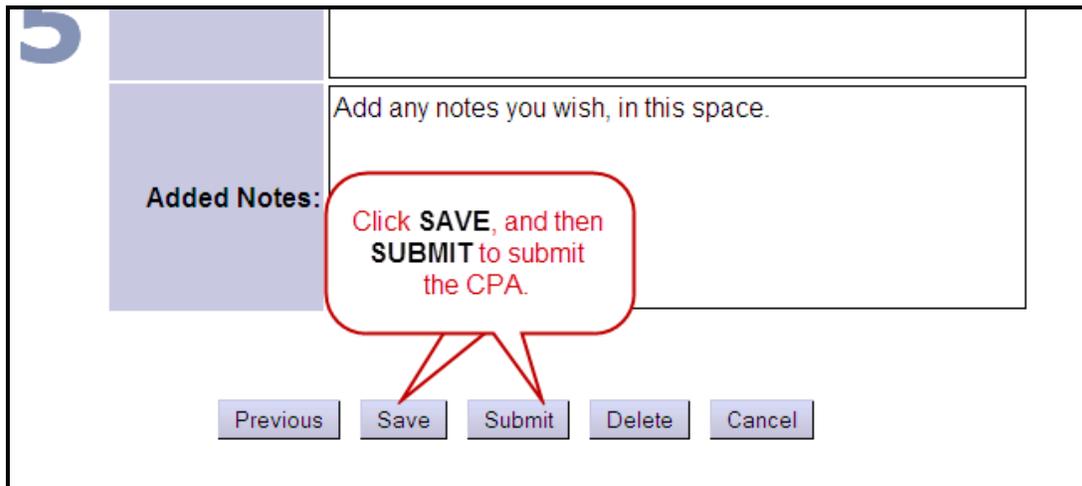
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**Rate and Duration of Services:**

<b>Effective Date:</b>	11/1/2013	<b>End Date:</b>	12/31/2013	<b>Ongoing:</b>	Y
<b>Unit Type:</b>	Days	<b>Units:</b>	1	<b>Rate:</b>	<input type="text" value="174.14"/>
<b>Notes:</b>	<input type="text"/>				
<b>Add Notes:</b>	<input type="text"/>				

13. Click **NEXT**.

14. Click **SAVE**. If you have the CPA Preparer role, this is all you can do. If you have the CPA Manager role, click **SUBMIT** to activate the CPA in the system.



The screenshot shows a software interface with a 'Notes' section. The 'Notes' section has a header 'Added Notes:' and a text area containing the instruction 'Add any notes you wish, in this space.' Below the text area is a row of five buttons: 'Previous', 'Save', 'Submit', 'Delete', and 'Cancel'. A red callout bubble points to the 'Save' and 'Submit' buttons with the text: 'Click SAVE, and then SUBMIT to submit the CPA.'

15. Once you've completed your work, you may want to review the status of the CPA.

- If it's in "**accepted**" status, then nothing else needs to be done.
- If in "**pending**", then it requires State staff review/acceptance (for geographical exceptions).
- If still in "**draft**" status, you most likely got an error message when you attempted to submit. Refer to the "**Brokerage CPA Problem Solving Matrix**" guide for assistance.

If you have additional questions regarding Waiver Case Management and CPAs, please see the **Waiver Case Management FAQ** document.