

COMMUNITY LIVING, AGING & PROTECTIVE SERVICES

*Self-Guided Orientation*

*ADvantage Program*  
**CDPASS**



**OKLAHOMA**  
**Human Services**

<https://oklahoma.gov/OKDHS>

## ***Consumer-Directed Personal Assistance Services & Supports***

CDPASS is a service option available to *ADvantage* members who need personal assistance services. CDPASS stands for Consumer-Directed Personal Assistance Services and Supports.

With CDPASS, you are the employer – meaning you choose who provides your services, and you choose when and how those services are provided.

By assuming employer responsibility you gain more control over how and when your services are delivered.

Please read this self-guided orientation to help you decide if CDPASS is the right choice for you.

If you would like to apply or have any additional questions, please contact your Case Manager or call us at 1-800-435-4711.

CDPASS is an exciting service option for *ADvantage* members. Read on to see if it's the right choice for you!

# *Table of Contents*

• The Choice Is Yours!	4
• Who's Eligible for CDPASS Service Option?	6
• Frequently Asked Questions	7
• Robert's Story	9
• Who's Involved in CDPASS?	10
• Brenda's Story	13
• Understanding the Program Rules	14
• Getting Started on CDPASS	15

## *The Choice Is Yours!*

The *ADvantage* team designed our supports and services in the state of Oklahoma to be Member-centered. Our program assists people with long-term care needs in staying in their homes and communities. *ADvantage* is funded by Medicaid and provides services from medical and assistive equipment to prescriptions and personal care.

One service option available under *ADvantage* is Consumer-Directed Personal Assistance Services and Supports, also known as CDPASS. CDPASS is voluntary and available to you at no cost. If you decide to enroll in CDPASS, you will become a CDPASS Member/employer.

Here are some facts about CDPASS Members/employers:

Members/employers make and direct decisions regarding their personal care services. They choose their employees, and where, when, and how they perform tasks in the service plan.

Members act as employers of personal services assistants, complete with an Employer Identification Number (EIN) from the Internal Revenue Service (IRS). CDPASS Members agree to comply with the Electronic Visit Verification requirement (more on that later). They recruit, hire, train, supervise and evaluate the performance of personal services assistants.

A Financial Management Service team, Case Manager and State of Oklahoma CDPASS team supports Members/employers in managing employer responsibilities, such as budgeting, completing paperwork, and managing your health and safety.

Members/employers continue to enjoy their other *ADvantage* services. When enrolled in CDPASS, the Member/employer acts as the employer of the personal services assistants (PSA) instead of a Provider agency. All other *ADvantage* services remain in place.

Members/employers can have greater flexibility in how their personal care services are delivered. Although the number of personal care hours generally remains the same, scheduling the delivery of hours is up to the Member/employer. For example, a PSA could be scheduled to work on weekends or any time that works for you. And, in some cases, the PSA may also provide non-medical transportation to approved activities and events.

## ***NEW for CDPASS!***

CDPASS is ready for the next generation with Electronic Visit Verification (EVV). EVV is a requirement for all home based services with *ADvantage*, including CDPASS. Together with the help of our FMS you must use EVV to create a record of your in-home care. This can be done a couple of ways. One, using a Smart Phone; or, Two using a landline telephone. This simple electronic process ensures accuracy and timeliness of payment to your employee. And, it protects you against fraud, waste and abuse. The EVV system is available at no additional cost.



## *Who's Eligible for CDPASS?*

- An individual who is enrolled in the *ADvantage* Program has personal assistance needs
- Resides in the state of Oklahoma
- Can direct his/her care or knows someone willing to assume the role of an authorized representative to provide member assistance with employer-related responsibilities
- Agrees to comply with the Electronic Visit Verification (EVV) requirement, and
- Successfully applies and enrolls to receive CDPASS services



# Frequently Asked Questions

## **What's the difference between CDPASS and the service I'm receiving now?**

Instead of a home care agency being in charge of the person who provides personal services assistance, you are. You will act as the employer and supervisor for this person. You will decide when your employee comes to your home, how they will perform the duties in your service plan, and what level of service is acceptable.

## **Can my employee drive me to places?**

Yes, your employee can provide non-medical transportation to approved activities and events. Approved activities and events are identified in your *ADvantage* service plan for personal care.

## **How much can you pay your employees?**

The maximum amount you can pay your employee is based on several factors. Your case manager will explain the budgeting process and help you determine how much you can pay your employee(s).

## **May I hire a family member to be my employee?**

Yes, some family members are eligible to work for you. However, spouses, legal guardians, powers of attorney, and authorized representatives may not serve as your employee. Some exceptions are allowed, but only for spouses in the most exceptional situations. Anyone hired must pass a background check.

## **What happens if CDPASS doesn't work out for me?**

You can always return to personal care services provided through a home care agency. Request any change to your *ADvantage* service plan through your case manager.

## **Are there any risks with CDPASS enrollment?**

If you enroll in CDPASS, you will no longer have an agency PCA working to keep you healthy and safe. Instead, you will develop supports and coordinate efforts to manage your health and safety. For instance, if you need assistance to get out of bed and your employee does not show up, you will not be able to call a home care agency. Instead, you will rely on your backup plan and supports and call those individuals.

### **Will I be handling the money for my employee's pay?**

No. A Financial Management Service (FMS) will serve as your payroll agent. They will work with you to approve your employee's time electronically using their EVV system and issue paychecks via direct deposit or even the mail.

### **Is there workers' compensation insurance and unemployment insurance?**

Yes. Workers' compensation insurance is withheld in the budget along with all required taxes. More information is available from the FMS and your case manager.

### **How much time does it take to get started on CDPASS?**

The amount of time varies with each participant. First, you must apply to CDPASS. Next, you will receive paperwork to enroll yourself and your employee(s) with the payroll agent or FMS. Lastly, your case manager will submit a request to change your ADvantage services to add CDPASS to DHS for authorization.

### **How much paperwork do I have to fill out?**

Initially, you will need to complete several forms for you and your prospective employee(s). Once enrolled, you will have occasional forms to complete for payroll and reimbursement for allowable expenses. However, you can appoint someone you trust, a family member or friend, to serve as your authorized representative to complete some or all of the paperwork for you. If you have questions about the paperwork you need to complete the FMS is available to support you.

### **Who do I call if I have questions about CDPASS enrollment?**

You may call us at Oklahoma Human Services, CDPASS services at 1-800-435-4711.

## Robert's Story

Last year, following a heart attack, Robert's doctors gave him two months to live.

Today, Robert, who also has diabetes, is still very much alive at age 70, but he requires help with daily personal care activities and his health care needs. He considers himself fortunate that the person taking care of him is also someone who knows him well: his sister, Daisy. She has been his paid caregiver since Robert's enrollment in *ADvantage* services' CDPASS option for personal care.

"He's much more comfortable with me," Daisy said. "I know what kind of food he likes to eat and how he likes it prepared, and I know much more about his symptoms."

Following an episode of insulin shock that put Robert in the hospital, both Daisy and Robert suffered a great deal of stress and anxiety that it would happen again. Robert cannot recognize when he's in danger of insulin shock, and neither could his home health aides employed through a home health care agency.

Following Robert's heart attack, his case manager told him about the CDPASS service, and he requested a brochure in the mail. "I didn't know a relative could do that," Robert said. "I thought I'd try it."

Once Daisy started work as Robert's PSA, she was able to devote her time to caring for Robert: monitoring his blood-sugar levels, preparing his meals, and making sure he takes his medications. And, having known Robert his whole life, Daisy also knows the warning signs of insulin shock. "He kind of slows down, and if he talks, his voice sounds different," she explained.

Since his enrollment in CDPASS a little over a year ago, Robert has not been hospitalized once and Daisy says CDPASS has significantly relieved the strain in both their lives.

## *Who's Involved in CDPASS?*

“Unity is strength. . . when there is teamwork and collaboration, wonderful things can be achieved.”

- *Mattie Stepanek*

As a CDPASS member/employer, you have support from a team of professionals committed to helping you succeed. Some will support you in protecting your health and safety, some will make sure your employees get paid, and some will be ready to answer when you have questions or concerns.

If you choose CDPASS, you will have an entire team to help you – a Consumer-Directed Agent / Case Manager (CDA/CM), the Financial Management Service team(FMS), the *ADvantage* CDPASS Team, and, if you want, an authorized representative. Read on to find out the different roles that each team member plays.

# Who's Who?

## **Member/Employer**

You are the Member/employer, and you will recruit, determine pay rates, hire, train, supervise and evaluate the performance of your PSA. You will have other responsibilities, such as creating a plan that will keep you safe when your PSA can't come to work and keep track of how many personal care hours you've used using the FMS's EVV system.

## **ADvantage CDPASS Team**

Oklahoma Human Services provides you with information about the CDPASS option, authorizes service plans, sends you employer training materials, and supports you in your role as an employer. If you have questions or comments you may call the CDPASS team toll-free at 1-800-435-4711

## **Consumer-Directed Agent Case Manager (CDA/CM)**

CDA/CMs are Case Managers with additional training in the CDPASS service option. CDA/CMs will assist in your transition from using a home care agency for your personal care services to employing your own assistant. Your CDA/CM will assist you with certain activities, such as the budget process, monitoring your monthly budget statements, and the performance of others assisting you with CDPASS.

If you decide that you no longer want to participate in CDPASS, the CDA/CMs will also support you in transitioning back to receiving assistance from a home care agency.

## **Personal Services Assistant**

The PSA is someone you hire to provide the personal services listed in your ADvantage service plan, which may include activities such as housekeeping, meal preparation, assisting with bathing and grooming, and non-medical transportation to approved activities and events.

As the member/employer, you will set the PSA's work schedule, hourly rate of pay, and provide supervision and training to do tasks the way you like them done. Your PSA is required to use the EVV system which helps both you to remain compliant and the PSA to be paid accurately.

### **Advanced Personal Services Assistant (APSA)**

The APSA is someone you hire to provide advanced care tasks, such as maintenance of a bowel program, or external catheter care. These services will be listed on your *ADvantage* service plan.

### **Authorized Representative (AR)**

The CDPASS team recommends that you appoint someone to assist you with your employer responsibilities. Several CDPASS Members really appreciate the support an AR can offer. For example, you may need an AR to help review paperwork, learn the EVV system, or talk to the FMS or CDPASS team on your behalf when you don't feel well.

The AR is a non-paid position, and can be a family member or a friend you trust. Anyone you designate as your Authorized Representative cannot also be employed as your PSA or your APSA.

### **Financial Management Service (FMS)**

The FMS will process and retain copies of member and employee packets, work with the CDPASS team to ensure employees are clear to begin work, pay employees, withhold and deposit payroll taxes, and file tax and labor reports on behalf of members. The FMS also offers ongoing training on their EVV system.

The FMS will provide member/employers with monthly service plan spending reports online or by mail, including wages paid and employer expenses reimbursed.

## *Brenda's Story*

Brenda is a fan of the services *ADvantage* provides, but her favorite service option is CDPASS.

Brenda has muscular dystrophy and has used a powered wheelchair for the last 20 years. She requires assistance getting into and out of bed — assistance her husband, who has a work-related disability, cannot provide.

“Tony makes all our meals and takes care of our home, but, since he got hurt, he can’t help me take a shower or get into bed at night,” Brenda said.

Because Brenda needs support every day of the week, in the mornings and at night, becoming a CDPASS employer works better for her than using a home health agency.

“Agencies have a lot of restrictions on them, and it was hard for me to find someone who could provide the morning and evening schedule I needed. Enrolling in CDPASS gave me the flexibility I needed to find an employee who could provide the services at a time most convenient to fit my needs,” Brenda said.

Since she didn’t know anyone who could work for her, Brenda posted online for an assistant. She was flooded with responses.

“I couldn’t believe how many calls and emails I got when I placed that ad. I was a little overwhelmed, but I found a great PSA right away,” Brenda said.

Two years later, Brenda has no regrets about enrolling in CDPASS. She did have to find another assistant when her first employee moved from Oklahoma, but the effort was worth it. Despite the added responsibilities she has as an employer, Brenda said CDPASS has made her life easier.

# Understanding the Program Rules

Everyone involved in CDPASS wants to help you, the Member/employer, to be successful and get the services that you need to be safe in your home. As the employer of record, you will be responsible to ensure that your employees are paid for time that they work. Since CDPASS is a service offered through *ADvantage* and must remain within its approved budgets, you will need to know these limits so you do not direct your employee to work when payment cannot be guaranteed. Failure to follow any of these program rules could result in your employee not getting reimbursed from the FMS and also result in your inability to continue to receive CDPASS services.

**1. Employees cannot begin providing services until your Case Manager informs you they can begin.**

- Several things must be completed before your employee can begin working.
  - Your employer file must be completed
  - The employee file must be completed
  - Your employee must pass a background check and register with Oklahoma Health Care Authority (OHCA). \*The FMS will help you with this
  - CDPASS services must be authorized on your *ADvantage* service plan

**2. You must remain within your weekly authorization of units. The FMS' EVV system help make this possible by locking in weekly units.**

- Upon developing a service plan with your CDA/CM, you will know how many hours per week of personal services you have requested.
- Once authorized, you will receive a communication from your CDA/CM telling you how many are approved. Whether you hire one or more employees, you must stay within this weekly hour limit.
- If your needs increase, let your CDA/CM know so a change can be made to your service plan.

**3. No matter how many hours you are authorized, no single employee(s) is permitted to work more than eight hours per day or 40 hours per week.**

- If your service plan approves you to have this many hours, you will need to select more than one employee to work any shifts longer than eight hours in a single day or a workweek of greater than 40 hours.

**4. Your employee cannot be paid to provide care while you are in a nursing facility or hospital, or out of the state of Oklahoma.**

- Your CDPASS services are to be used to take care of you only. If you are in a hospital or nursing facility, no additional assistance can be provided.
- If you are out of state, then you will need to arrange for informal, or unpaid, supports to assist you until you return home.

**5. EVV must be used by the PSA and verified by the Member in order to ensure payment and compliance with State and Federal law.**

- If for some reason the EVV is unavailable, the FMS will assist you and your employee in documenting time worked. No paper timesheets can be accepted.

## Getting Started on CDPASS

1. If you decide you want to apply to CDPASS tell your CDA/CM or call us at 1-800-435-4711.
2. We can take your application over the phone. Upon approval of your application, the CDPASS team will give you access to the employer and employee handbooks. Review these handbooks carefully, and let us know if you have any questions. We will also schedule a time for the FMS to complete necessary forms with you.
3. The FMS will mail the enrollment packets for you and your employee(s).
4. Locate a person you are interested in hiring as your employee. You may advertise for your employee or you may ask someone you already know to apply. You may want to have someone in mind before you even apply in Step 2.
5. Once you have found someone you want to hire, complete the new employee packet provided by the FMS with your applicant(s). Mail this packet back to the FMS and be sure to call them if you have questions.
6. A background check will be conducted for all potential employees.
7. Once your applicant has cleared the background check and they are registered with OHCA, your CDA/CM will receive notice to end your PCA/ASR services from your home care agency, and add the CDPASS service option to your *ADvantage* service plan.
8. Once CDPASS services have been authorized on your *ADvantage* service plan, you will receive notice from your CDA/CM that you may instruct your employee to begin working. Remember, your employee may not begin working until this step has been completed.
9. Begin your role as a CDPASS Member/employer. Approve your employee check-in and check-outs within the FMS's EVV system. Follow your backup plan when necessary. Supervise your employee(s). Terminate and rehire employees as needed.
10. Contact your Authorized Representative, your CDA/CM, the *ADvantage* CDPASS team (1-800-435-4711) for guidance and assistance as you participate in this service option.



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