

AGING SERVICES

Self-Guided Orientation

ADvantage Program
CD-PASS



**Aging
Services**

www.OKDHS.org

Consumer-Directed Personal Assistance Services & Supports

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

In CD-PASS, you are the employer – meaning you choose who provides your services, and you choose when and how those services are provided.

If you sign up for this service option, you'll have more control over how and when your services are delivered, but you'll also have more responsibilities.

Deciding whether to join CD-PASS is a choice you'll make, and this guide will provide you with the information you will need to make the decision that's right for you.

To help you make your decision, we've provided some materials so you can learn more about CD-PASS. If you decide to participate, complete the enclosed documents and return them by mail to DHS in the provided envelope.

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

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The Choice Is Yours!

The *ADvantage* Program was designed to provide supports and services that assist people with long-term care needs, like you, in staying in their homes and communities. *ADvantage*, funded by Medicaid, provides in-home support to Oklahomans. The services offered range from medical and assistive equipment to prescriptions and personal care.

One service available under the *ADvantage* Program is Consumer-Directed Personal Assistance Services and Supports, also known as CD-PASS. CD-PASS is voluntary and available to you at no cost. If you decide to enroll in CD-PASS, you will become a CD-PASS member/employer. Here are some facts about CD-PASS 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/employers act as supervisors and employers of personal services assistants. They recruit, hire, train, supervise and evaluate the performance of personal services assistants.

Members/employers are supported as employers. Assistance in managing employer responsibilities, such as budgeting, completing paperwork, and managing your health and safety is provided.

Members/employers continue to enjoy their other *ADvantage* services. When enrolled in CD-PASS, the member/employer, rather than a home care agency, acts as the employer of the personal services assistants. All other *ADvantage* services remain in place.

Members/employers 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 personal services assistant could be scheduled to work on weekends. They may also be used to provide transportation to approved activities and events.



Who's Eligible for CD-PASS?

- An individual who is enrolled in the *ADvantage* Program, has personal assistance needs,
- Resides in an eligible county (available statewide by 2016),
- Is able to direct his/her care or knows someone who is willing to assume the role of authorized representative to provide member assistance with employer-related responsibilities, and
- Elects to receive CD-PASS services



Frequently Asked Questions

What's the difference between CD-PASS 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 he or she 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 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 CD-PASS 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 CD-PASS enrollment?

If you enroll in CD-PASS, 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 company named Public Partnerships LLC will serve as your payroll agent. They will receive your employee's timesheet and issue paychecks via mail or direct deposit.

Is there workers' compensation insurance and unemployment insurance?

Unemployment benefits are available through the State of Oklahoma unemployment insurance. The payroll agent, PPL, withholds required taxes for this benefit and pays them to the appropriate federal and state entities. Workers' compensation insurance is not withheld, but individual members can use their budget to purchase individual policies and receive reimbursement for the expense.

How much time does it take to get started on CD-PASS?

The amount of time varies with each participant. First, you must apply to CD-PASS. Next, you will receive paperwork to enroll yourself and your employee(s) with the payroll agent, PPL. Lastly, your case manager will submit a request to change your *ADvantage* services to add CD-PASS 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 payroll agent, PPL, can help you.

Who do I call if I have questions about CD-PASS enrollment?

You may call the Oklahoma Department of Human Services, CD-PASS 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'* CD-PASS 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 CD-PASS 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 CD-PASS a little over a year ago, Robert has not been hospitalized once and Daisy says CD-PASS has significantly relieved the strain in both their lives.

Who's Involved in CD-PASS?

“Coming together is a beginning.

Staying together is progress.

Working together is success.”

- *Henry Ford*

As a CD-PASS member/employer, you will not need to go it alone. In fact, there are many people who are committed to helping you succeed. These people make up a team that will support you in different ways. 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 CD-PASS, you will have an entire team to help you – a Consumer-Directed Agent / Case Manager (CDA/CM), the Public Partnerships LLC (payroll agent), CD-PASS staff, the DHS ADvantage Administration, 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 keeping track of how many personal care hours you've used.

CD-PASS Services/ADvantage Administration (DHS)

DHS provides you with information about the CD-PASS option, sends you employer training materials, and supports you in your role as an employer. DHS conducts background checks on individuals you want to hire as your PSA to make sure they're safe to work for you. If you have questions or comments about CD-PASS, you may call DHS toll-free at 1-800-435-4711.

Consumer-Directed Agent Case Manager (CDA/CM)

CDA/CMs are Case Managers with additional training in the CD-PASS 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 CD-PASS.

If you decide that you no longer want to participate in CD-PASS, 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 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.

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)

It is recommended that you appoint someone to assist you with your employer responsibilities. At the very least, you may need an AR to help review paperwork, fax timesheets, or talk to the payroll agent or DHS 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.

Public Partnerships LLC (PPL) - payroll agent

Public Partnership LLC (PPL) will process and retain copies of member and employee packets, work with DHS 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.

PPL will provide member/employers with monthly service plan spending reports, including wages paid and employer expenses reimbursed. You may contact PPL's customer service staff with questions at 1-866-537-8379.

Brenda's Story

Brenda is a fan of the services *ADvantage* provides, but her favorite service is CD-PASS.

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 CD-PASS 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 CD-PASS 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 advertised in her local newspaper for an assistant. She was flooded with responses.

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

Two years later, Brenda has no regrets about enrolling in CD-PASS. 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 CD-PASS has made her life easier.

Understanding the Program Rules

Everyone involved in CD-PASS want 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 CD-PASS is a service offered through the *ADvantage* Program 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 payroll agent and also result in your inability to continue to receive CD-PASS services.

1. Employees cannot begin providing services until PPL 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
 - CD-PASS services must be authorized on your *ADvantage* service plan

2. You must remain within your weekly authorization of 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 letter from *ADvantage* 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 work week of greater than 40 hours.

4. Your employee cannot be paid to provide care while you are in a nursing facility or hospital, or for any time while you are on vacation or out of state.

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

Getting Started on CD-PASS

1. If you decide you want to apply to CD-PASS, complete and mail the enclosed forms in the envelope provided.
2. Upon approval of your application, DHS will send you the employer and employee handbooks in the mail. Review these handbooks carefully, and call DHS if you have any questions, 1-800-435-4711.
3. PPL will mail the enrollment packets for you and your employee(s). If you have any questions, call PPL at 1-866-537-8379.
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.
5. Once you have found someone you want to hire, complete the new employee packet provided by PPL with your applicant(s). Mail this packet back to PPL.
6. DHS will conduct background checks for potential employees.
7. Once your applicant has cleared the background check, your CDA/CM will receive notice to end your PCA/ASR services from your home care agency, and add the CD-PASS service option to your *ADvantage* service plan.
8. Once CD-PASS services have been authorized on your *ADvantage* service plan, you will receive notice from PPL that you may instruct your employee to begin working.
9. Begin your role as a CD-PASS member/employer. Turn in timesheets every two weeks. Follow your backup plan when necessary. Supervise your employee(s). Terminate and rehire employees as needed.
10. Contact your Authorized Representative, your CDA/CM, DHS (1-800-435-4711), and PPL (1-866-537-8379) for guidance and assistance as you participate in this service option.



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