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*.
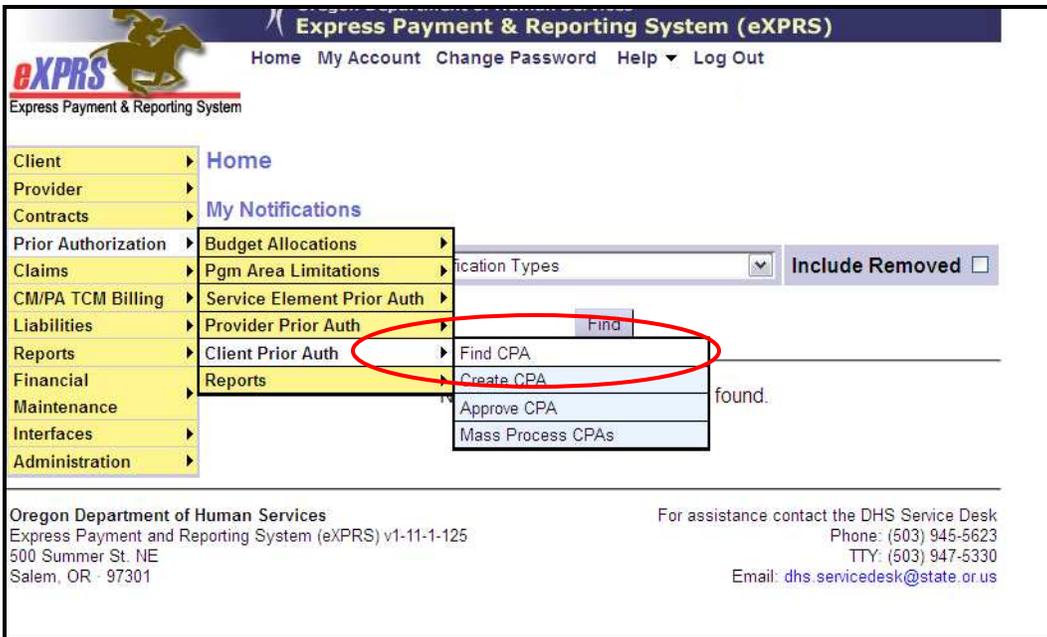
This will take the user to the **Find Client Prior Authorization** page.

3. 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.

4. 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.

5. With the selected CPA open, scroll to the bottom and click *EDIT* at the bottom of the CPA to open the CPA.

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**".

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***".

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.

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.

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.

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**.

13. Click **NEXT**.

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

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.

Unit Type: Days   **Units:** 1   **Rate:** 174.14

Notes:

Add any notes you wish, in this space.

Add notes here, if you like.

Click **NEXT**.

Next   Previous   Delete   Cancel

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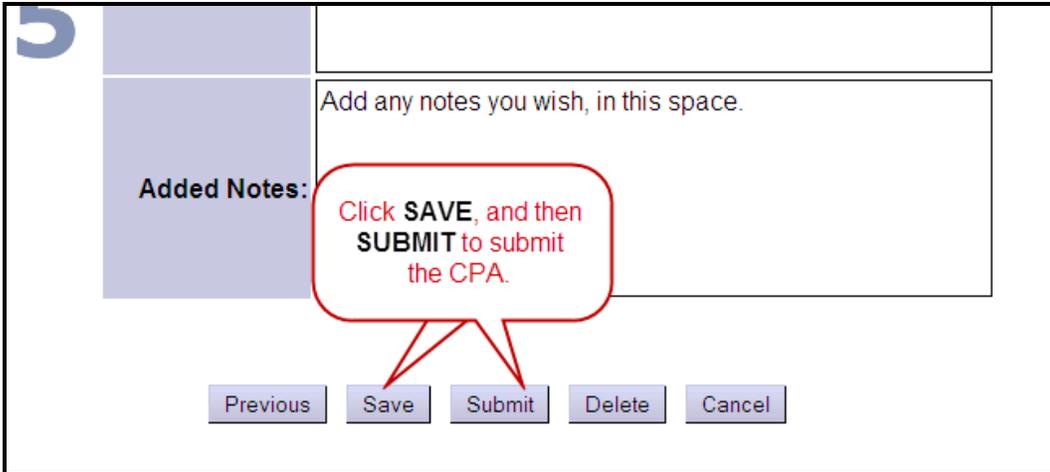
You may only have permissions to SAVE, but not Submit. If that is the case, then notify the person at your organization who has the CPA Manager role to submit the CPA.

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