



**ADvantage  
Program  
CD-PASS**

# **SELF-GUIDED** *Orientation*

## Consumer-Directed Personal Assistance Services & Supports

CD-PASS is a new 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 to handle.

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 a self-assessment so you can determine if CD-PASS is what you want. If you decide to participate, complete the enclosed application and mail it in the provided envelope, along with your self-assessment.

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



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As you know, 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 over 15,000 Oklahomans. The services offered range from medical and assistive equipment to prescriptions and personal care.

The newest 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 Member/Employers:

**They make and direct all decisions regarding their personal care services.**

You would choose who works for you, where, when, how, and what tasks are performed.

**They act as supervisors and employers of their personal care assistants.** You would recruit, hire, train, supervise, and, when necessary, fire your personal service assistants.

**They are supported as employers.** You would have assistance in managing your employer responsibilities, such as budgeting, completing paperwork, and managing your health and safety.

# The Choice Is Yours!

**They continue to enjoy their other ADvantage services.** If you join CD-PASS, you will continue to receive all the services you have now. The only thing that changes is that you, rather than a home health agency, act as the employer of your personal services assistants.

**They have greater flexibility in how their personal care services are delivered.**

The amount of your personal care hours will stay the same, but when you use them and how is up to you. You can hire a personal care assistant to provide support on the weekends. They can provide you with transportation to approved activities and events.

## Who's Eligible for CD-PASS?

An individual who is eligible for ADvantage Services, has personal assistance needs, and:

- Resides in Tulsa, Creek, Rogers, or Wagoner Counties or within the following Osage County zip codes: 74126, 74127, 74106, or 74063\*,
- Is able to direct his/her care or knows someone who is willing to assume the role of Authorized Representative (Authorized Representatives provide assistance with employer-related responsibilities), and
- Volunteers to receive CD-PASS services.

*\*Other counties may be added in the future*

# Frequently

**Can I hire a family member to be my employee?** Yes. You can hire anyone you want as long as they pass a background check. Please know that anyone who is your employee cannot also be your Authorized Representative.

**How much can I pay my employee?** The maximum amount you can pay your PSA per hour is currently \$11.46. If you use advanced services, your APISA could be paid a maximum of \$13.80 per hour.

**What's the difference between CD-PASS and the service I'm receiving now?** Instead of your home care agency being in charge of the person who provides personal service assistance, you are. You will act as the employer and supervisor for this person. You will decide when your employee comes to your home, what duties he or she will perform, and what level of service is acceptable.

**What happens if CD-PASS doesn't work out for me?** You can always return to receiving your personal care services through the *ADvantage* Program with a home health agency as the employer and supervisor of the person who provides you with personal service assistance.

**Can my employee drive me to places?** Yes, your employee can provide transportation to approved activities and events. Approved activities and events are developed by the Interdisciplinary Team and identified in the service plan.

# Asked Questions

**Are there any risks in joining CD-PASS?** If you join CD-PASS, you will no longer have a Home Care agency working to keep you healthy and safe. Instead, you will need to 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 won't be able to call your Home Care agency. Instead, you would 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 Acumen acts as your Fiscal Agent. They receive your employee's timesheet and directly mail him or her a paycheck or directly deposit a paycheck into his or her bank account.

**How much time does it take to get started on CD-PASS?** The amount of time varies with each participant. If you start the program knowing who will be your employee, the process can be completed in a few weeks. If you need to find an employee, it will depend on how long that search takes you.

**How much paperwork do I have to fill out?** You will have to fill out some paperwork like timesheets and some employment forms. However, you can appoint someone you trust, a family member or friend, to serve as your Authorized Representative. This person can also complete some or all of the paperwork for you. If you have questions about the paperwork you need to complete, the FMS can help you.

**Who do I call if I have questions about CD-PASS?** You can call the Administrative Agent for CD-PASS 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 round-the-clock help with daily personal care activities and his health care needs. He considers himself fortunate that the person taking care of him 24/7 is also someone who knows him well: his sister, Daisy. She has been his paid caregiver since Robert's enrollment in CD-PASS.

"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.

Following Robert's heart attack, he received a brochure in the mail about CD-PASS. "I knew there was a program where people were taking care of other people, but I didn't think 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 the program 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 (CDA), the Fiscal Agent, the Financial Management Services Provider (FMS), the Administrative Agent, 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**.

As an employer, you will recruit, determine pay rates, hire, train, supervise, and fire (if necessary) 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.

## Fiscal Management Services Provider (FMS)



I'll be your **Financial Management Services Provider (FMS)**.

I'll provide you with Employer Training and support you in your role as an employer. For instance, I'll conduct background checks on individuals you want to hire as your PSA to make sure they're safe to work for you.

# Who's Who

## I'll be your **Consumer-Directed Agent (CDA).**

I'll play the same role your Case Manager did, but I'll also lend a hand when you make the transition from using a home care agency for your personal care services to employing your own assistant.

If you decide that you no longer want to participate in CD-PASS, I'll support you in transitioning back to receiving assistance from a home care agency.



**Consumer-Directed Agent (CDA)**

## I'll be your **Fiscal Agent (Acumen).**

I'll handle almost all of the financial issues related to employing your personal assistants. For instance, you'll fax timesheets to me, and I'll make sure your assistants are paid twice a month.



**Fiscal Agent**

# Who's Who

## Personal Services Assistant (PSA)



I'll be your **Personal Services Assistant (PSA)**.

My job is to provide personal services such as housecleaning and meal preparation and other tasks such as assisting you with bathing and grooming.

You'll be my employer, setting my schedule, deciding how much to pay me, and training me to do tasks the way you like them done.

## Advanced Personal Services Assistant (APSA)



I'll be your **Advanced Personal Services Assistant (APSA)**.

If you need assistance with technical services such as suctioning, maintenance of a bowel program, or catheter care, you can hire me to provide that assistance.

You'll be my employer, setting my schedule, deciding how much to pay me, and training me to do tasks the way you like them done.

## Who's Who

### Authorized Representative

#### I'll be your **Authorized Representative.**

You don't need an Authorized Representative in order to participate in CD-PASS, but if you're worried about handling the employer responsibilities on your own, I can take care of some or all of them for you.



I can be a family member or a friend you trust, but, keep in mind that if I serve as your Authorized Representative, I cannot also be your PSA or your APSA. Also know that I do not get paid for serving as your Authorized Representative.

#### I'll be your **Administrative Agent.**

My job is to provide you with information about the CD-PASS option. I have a toll-free number you can call if you have questions or complaints about CD-PASS. You can reach me at 1-800-435-4711.



### Administrative Agent

# Getting Started

1

Read this orientation guide and decide if you want to join CD-PASS. If you have questions at any time, you can call the Administrative Agent at 1-800-435-4711.

2

If you decide you want to sign up for CD-PASS, complete and mail the application and self-assessment in the envelope provided.

3

You'll receive the Self-Guided Employer Training manual in the mail. Review this manual.

4

Locate a person you are interested in hiring as your employee. You can advertise for your employee or you can hire someone you already know.

5

Decide how much you want to pay your employee(s) and what, if any, benefits you want to provide.

6

Once you have found someone you want to hire, you and he or she complete the required paperwork. Then, fax or mail this paperwork to the FMS.

# on CD-PASS

7

FMS conducts background checks of potential employee and notifies you of the result.

If the background check is clear, you can hire the applicant. However, if he or she is the first employee you have hired, he or she cannot begin work until Step 8 is completed.

8

Hold a transition meeting with your CDA/Case Manager to end your services from a home care agency, add the CD-PASS service option, and create a backup plan.

9

Your new employee completes paperwork related to payroll and faxes or mails it to the Fiscal Agent (Acumen).

10

Begin your role as a CD-PASS Member/Employer. Follow your backup plan when necessary.

# 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 support I needed when I needed it. Enrolling in CD-PASS gave me the flexibility I needed to find an employee who could provide the services I want,” 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 joining 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 says CD-PASS has made her life easier.



## Want to sign up for CD-PASS? Then follow these steps!

1. Complete the CD-PASS Self-Assessment
2. Complete the CD-PASS Application
3. Mail both completed forms in the provided envelope

### **ADvantage CD-PASS Self-Assessment Tool**

The self-assessment tool will provide you with information and insight to determine if CD-PASS services are right for you.

The questions on the self-assessment will ask you about either your experience, skill, knowledge, or abilities to manage the aspects involved in CD-PASS. Use the assessment to evaluate your strengths and weaknesses and to identify areas of initial support you need in managing your personal assistance services.

### **ADvantage CD-PASS Application**

Completing the CD-PASS application makes sure that we have all the necessary information to get you started.