

## PARTICIPANT GUIDE TO CDCS

This is a guide to provide steps in the CDCS process to assist participants. This is based on DHS policies and guidelines which are followed by Ramsey County. This guide is only used to offer support to participants and does not take the place of DHS guidelines and supports.

### PRIOR TO STARTING CDCS:

**1. Case manager will verify eligibility for CDCS-** You must meet the following [eligibility criteria](#) to be eligible for CDCS:

- Have Medical Assistance based on disability (Except for AC)
- Have waived services or AC services
- Not receiving any of the following services:
  - Licensed foster care while residing in a residential setting licensed by DHS
  - Customized living services.
  - Integrated community supports.
- Not currently on the Minnesota Restricted Recipient Program, MRRP

**NOTE:** For individuals with active child/adult protection cases, case manager will consult with the coordinator to ensure CDCS is a healthy/safe option.

**2. IF ELIGIBLE, you will need to determine if CDCS is right for you.** Your case manager will *provide you with the CDCS budget*. (Note: An additional 30% MAY be available to those who meet eligibility criteria. You can find more information [HERE](#). In addition, individuals may be eligible for a 7.5% increase to be put toward qualified staff's wages, and you can find information [HERE](#) to see if you qualify.

**3. You will need to take the DHS training [CDCS: Is it right for you?](#)** Let your case manager know when you have completed this training.

**4. Compare CDCS vs. Licensed option-** This requires service planning with your case manager. What do you need? Will the CDCS budget meet your needs?

**5. Case manager will send you the CDCS ORIENTATION PACKET to review.**

**6. Let your case manager know if you want to move forward with CDCS!** This is very important. You need a firm understanding of CDCS, the budget, etc. PRIOR to moving on to step 8 of hiring a support planner and choosing an FMS. Support planners are not paid unless CDCS opens, so you should not work with a support planner until you are sure you will be using CDCS.

**7. Determine the waiver span and prorate the budget-** If CDCS is chosen, your case manager will work with you to determine if new screening is needed, determine the waiver span, prorate budget if needed, and coordinate ending of existing services with opening of new services when applicable.

**IF CDCS IS CHOSEN:**

<p><b>8. Choose a Fiscal Management Service Provider (FMS) and Support Planner. (Forms should be in your Orientation Packet)</b> Support Planners are not required, but strongly recommended at least for the 1<sup>st</sup> yr.</p>
<p><b>9. Your case manager should give you and your support planner the prorated budget, waiver span, MnCHOICES Assessment Summary and Supplemental Summary Charts, to write the plan. (NOTE: If you are writing the plan yourself, the forms to write the plan, can be found on the <a href="#">Ramsey County CDCS Website .</a>)</b></p>
<p><b>10. Review your MnCHOICES Assessment -</b> Assessed needs from the MnCHOICES assessment need to be reflected in your CDCS plan, and how services/items requested will meet those needs.</p>
<p><b>11. Together with your case manager, notify other providers if services will be ending (if applicable).</b></p> <ul style="list-style-type: none"> <li>• <b>Licensed Waiver Services-</b> If licensed services were in place, and are not continuing with CDCS, notify the providers of the end date. If licensed services are continuing within the CDCS plan, these services go IN THE CDCS PLAN.</li> <li>• <b>MA Homecare Services (CFSS/PCA, NURSING, RN SUP)-</b> Notify agency if these services are ending. If these services will continue, they need to go IN THE CDCS PLAN.</li> <li>• <b>CSG/CFSS-</b> If you are moving from CSG/CFSS to CDCS and are going to continue with the same FMS, let them know that you are switching programs, give them the effective date, and ask that they initiate any further BG checks/hires needed. If you are using a different FMS, let the FMS know that you are ending CSG</li> <li>• <b>FSG-</b> If opening a waiver, FSG will end, and the case manager will close this for you.</li> </ul>
<p><b>12. Write your CDCS plan or meet with your support planner to write the plan, referencing your MnCHOICES assessment and the Participant Guide to DHS Policy- CDCS Unbundled.</b> Again, if you are writing the plan yourself, reference the <b>Participant's guide to Completing the CDCS Plan</b> document. These documents can be found on the <a href="#">Ramsey County CDCS Website .</a></p>
<p><b>13. Submit your CDCS plan to your case manager for review/approval.</b></p>

**CDCS RENEWALS:**

<p><b>1. MnCHOICES Reassessment-</b> MnCHOICES will complete your reassessment 60-45 days before the start of the new waiver span. It is important to be responsive to the assessor to get the reassessment scheduled.</p>
<p><b>2. Begin writing your plan 60 days prior to renewal-</b> Meet with your support planner (if you use one). You can use the previous year's budget, until the actual budget is received. If writing your own plan, refer to the <b>Participant Guide to Completing the CDCS Plan</b> document.</p>
<p><b>3. Compete the annual meeting</b> with your case manager following the MnCHOICES assessment and discusses assessed needs and items to be addressed in CDCS plan.</p>
<p><b>4. Review the MnCHOICES assessment when received -</b></p> <ul style="list-style-type: none"> <li>• If you are eligible for 10 or more hours of PCA services and/or have a HC rating of EN, you are eligible to apply for the 7.5% CDCS <a href="#">Budget Enhancement</a>. Talk to your case manager if this applies to you.</li> </ul>

<ul style="list-style-type: none"> <li>• Pay attention to the assessed needs...the CDCS plan you write, will need to address these assessed needs.</li> </ul>
<p><b>5. Write your CDCS plan or meet with your support planner to write the plan, referencing your MnCHOICES assessment and the Participant Guide to DHS Policy-CDCS Unbundled.</b> Again, if you are writing the plan yourself, reference the <b>Participant Guide to Completing the CDCS Plan</b> document. These documents can be found on the <a href="#">Ramsey County CDCS Website</a></p>
<p><b>6. When you receive the CDCS budget (or instructions to submit using last year's amount) finalize the plan by:</b></p> <ul style="list-style-type: none"> <li>• <b>Adjusting the budget if the budget amount changed</b> (<i>If your screening was entered late, you will submit the plan using last year's amount as a temporary budget, until the new amount comes in.</i>)</li> <li>• <b>Making sure assessed needs are addressed in the plan.</b> (<i>If you have not received the MnCHOICES assessment documents yet, go off last years. Do not wait for the MnCHOICES assessment to submit the plan!</i>)</li> </ul>
<p><b>7. Submit the plan to your case manager-</b> This can be done by you or your support planner if you have one.</p> <ul style="list-style-type: none"> <li>• Don't hold up submission of the plan if missing documentation for something that can be pended until received.</li> </ul> <p><b>8. <u>Aim to have your plan submitted by the 15<sup>th</sup> of the month</u></b> prior to renewal.</p>
<p><b>9. GO TO APPROVAL OF THE PLAN.....</b></p>

#### APPROVAL OF THE PLAN:

<p><b>1. Once the plan is received, your case manager will review the plan,</b> letting you know if further documentation is needed to submit the plan for approval.</p>
<p><b>2. Case manager will submit your plan for approval,</b> sending to the CDCS coordinator if it is an initial plan, or their supervisor if it is a renewal.</p>
<p><b>3. Supervisor/coordinator returns approved plan to case manager, who forwards it to you, the FMS, and your support planner</b> (if you have one).</p>
<p><b>4. Review the plan. Pending or denied items will be listed on the cover sheet or Notice of Decision.</b></p> <ul style="list-style-type: none"> <li>➤ Start working on information needed to un-pend services/items</li> <li>➤ Review denial information (if applicable) and your right to appeal.</li> </ul>
<p><b>5. FMS will send you a budget. Review this ensure accuracy.</b> You should also receive monthly spending summaries that you will need to review as well, to ensure you are staying within the budget and what has been approved in the plan.</p>

**RENEWAL FOLLOW-UP/OTHER IMPORTANT THINGS TO KNOW WITH CDCS:**

**Actual Budget:** When a MnCHOICES Assessment is not entered in time to get a CDCS budget for a renewal, there is no “Actual” budget until after the plans starts. In this case, we need to use last year’s amount as a temporary budget. When a temporary budget is used, we need to get the “actual” budget from WMS in the month of the renewal. CDCS coordinator will get your case manager the actual budget around the 10<sup>th</sup> of that month. If the budget goes up, you will have more funds to work with. If the budget goes down, you will need to reduce your plan accordingly.

**Appeals:** Your case manager’s supervisor or the CDCS coordinator (whoever approved the plan) will outline the reason for denial, based on CDCS or Waiver Policy. You have the right to appeal services/items that were denied. Information on how to do this will be sent with the plan. if you have questions about appealing, you can ask your case manager.

**Pending Items:** If there wasn’t enough information in the plan to approve a service/item, it would have been pended for more information. Please work on the information needed right away, so that the county can determine whether the service/item can be approved. If pended service/item is something that is typically allowed, but we are just missing the necessary documentation to approve, the item can remain in pending status until the documentation is received. If pended service/item does not meet the criteria above, the county may take action/deny the service/item if the information is not received w/in 60 days.

**CDCS FORMS AVAILABLE ON THE RAMSEY COUNTY WEBSITE-** All CDCS forms can be found on the Ramsey County website [HERE](#).

**YOU MUST REVIEW SPENDING SUMMARIES MONTHLY:** Sign up for portal access with FMS or be sure that you are set up to receive monthly budget summaries, to review spending. Pay close attention to spending in each area, to ensure overspending is not occurring.

**CDCS PROCESSES****Making revisions to a CDCS Plan**

**Addendums-** An “Addendum” or “revision” is a change to the plan, during the service plan year.

**The following changes require only an email to the case manager for approval: (If you are making one of these changes no form is needed. If you have a support planner, include them in your correspondence.)**

- Items on plans/addendums that were pended for more information. Send information needed to your case manager.
- Moving unallocated funds or funds between items/services that are already approved.
- Correction of Fiscal fees on an initial plan or renewal.
- Use of COLA increase for items/services already approved in the plan.

**The following changes can be approved by your case manager but require a CDCS Addendum Form or a revision of the plan:**

- Increasing PPOM/Spouse wage up to the max (\$24.84 w/o PTO, \$23.74 w/ PTO)
- Increase to staff wage up to \$24.84. (Over \$24.84 must be justified and reviewed by supervisor)
- FMS agency or Support Planner switch
- Adding Transportation, Licensed services, or items/services in an emergency for health and safety.

**All other changes require supervisor approval and require a CDCS Addendum Form or a revision of the plan:**

**Important things to remember:**

- Addendums/revisions/changes not accepted within 30 days of the end of the plan, unless for critical health and safety reasons.
- The county has 30 days to review the addendum/revision, but it will be processed/approved ASAP
- Addendum form is found on the [Ramsey County CDCS Website](#)