

Monthly Meeting Minutes- New Service Facilitator

Meeting Details	Dates: May 4, 2021 (9:00a-10:00a) Location: Web based Meeting Facilitator: Consumer Direct Care Network Participants: 15
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Who Does CDCN Serve?

Consumer Direct serves as the F/EA for participants enrolled in certain Medicaid waiver programs such as:

- i. Community Living (CL) waiver
- ii. Family and Individual Supports (FIS) waiver
- iii. Commonwealth Coordinated Care (CCC) Plus Waiver
- v. And any Consumer-Directed Fee-for-Service (FFS) member not enrolled in managed care.

CDCN issues payroll for the following three Service Types:

- i. Attendant Services, service code S5126
- ii. Respite Services, service code S5150
- iii. Companion Services, service code S5136

Communication with Service Facilitators

CDCN holds our New Service Facilitator trainings on the first Tuesday of every month at 10am. Email-blasts are sent out 48 hours before the trainings. If a meeting is ever cancelled, an Email-blast will be sent out to inform Service Facilitators of the cancellation.

CDCN also holds ongoing Service Facilitator trainings for Existing Service Facilitators quarterly on the third Tuesday and third Thursday of the month. We encourage Service Facilitators to join us monthly for the most up to date information. The afternoon session of the Existing SF training will be held at the new time of 3pm EST. The morning session will remain at its scheduled time of 10 am. Please regularly check our Training Schedule located under the Training Materials tab for all upcoming training sessions.

Previous Meeting Minutes can be found on CDCN's website at www.Consumerdirectva.com/sfforms.

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HIPPA-Compliant Emails

Sometimes CDCN will need to send Service Facilitators an email that contains Protected Health Information (PHI) or Personal identifiable information (PII). To remain in compliance with the Health Information Portability and Accountability Act (HIPAA), we will only send sensitive information via secure electronic communications.

CDCN uses a system called Zsecure to encrypt information sent via email.

These emails may end up in your Spam folder! Please check there first, if you think you're missing an email from CDCN.

To use our secure services, Service Facilitators will need to create an account to open each of these emails.

Instructions on how to do this are available on our website under the *Forms* tab or by going to www.consumerdirectva.com/forms and clicking on the *Other* section.

Once there, the title of the document is "Secure Email Instructions".

CDCN's Website

Now that you are aware of what CDCN does, CDCN wanted to introduce you to one of our most valuable resources for Service Facilitators, Employers and Attendants: our website.

Our user-friendly website has up to date training materials, one-page fact sheets, easily identifiable forms organization, and more. There are training videos at the top of the training materials, and one-page fact sheets directly below to assist EORs, Attendants, and SFs with navigating our Web Portal, CellTrak for EVV and more. We also have new user-friendly information in our forms section to help you determine which forms should be accessed

Our website is where you will find useful forms, such as the Confidentiality Agreement, and the Service Facilitator contact information list. This list will contain all the names of your agents within your agency.

Please note that only one Agreement and SF list is needed per agency. These two items help CDCN provide the correct caseloads on our web portal (Directmycare.com).

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Other items accessible via our website include enrollment packets, the web portal link, training materials, contact information, and more! The website address is ConsumerDirectVA.com.

Fiscal Agent Request Form (FARF)

The FARF is the Fiscal Agent Request Form. As Service Facilitators, this form can be filled out and submitted to Consumer Direct when there is a change that will affect the participants' services.

The FARF form provides CDCN with the Participant and Employer's updated demographic information, which Service Facilitator is assigned to the Clients account, and the reason that the FARF is being submitted which is important so that CDCN knows what steps to take next.

This form can be located under the *Forms* tab in the *Service Facilitator* section of our website.

There are 4 reasons Service Facilitators will submit a FARF to CDCN:

- i. An existing Participant is changing to a different Employer of Record;
- ii. An existing Participant is changing to a new Service Facilitator;
- iii. An existing Participant is changing from one FEA to another FEA.
- iv. Or, for a new Participant (new to self-directed services)

Please take the time to fill out the FARF completely and accurately. Once filled out completely, the FARF needs to be submitted by email to VAREferrals@ConsumerDirectCare.com or fax at 1-877-571-8649.

The VAREferrals@consumerdirectcare.com inbox is the email account dedicated specifically for these forms and is how CDCN prioritizes processing the FARFs.

FARF Reminders

A FARF is used for all new or transition enrollments.

Packets cannot be processed without a FARF.

Employer of Record Changes also require a FARF.

Always use the most updated version which can be found on our website under consumerdirectva.com/forms.

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CDCN will not process Employer Packets in which a change of EOR has occurred without receiving a FARF.

CDCN has made an update to the EOR Change Section on the FARF. This change includes the Effective Date and instructional language for new EOR in the EOR change section.

These changes will provide the necessary instructions for EOR and Services Facilitator on how to complete an EOR Change without delay.

Has My FARF Been Received?

One of the most common questions we receive during FARF submission is, has my FARF been received?

If the FARF was completed via DocuSign, a confirmation email will be sent once the FARF has been reviewed by the team and processed. If the FARF has an error and needs a correction, or has an update regarding eligibility, the FARF team will download the FARF via PDF from DocuSign and submit back to the SF's email address with the information needed.

If the FARF was completed by paper and submitted by email or fax, our FARF team will send a follow up email with the status. This email will inform of any corrections, updates, eligibility inquiries, or if it was successfully processed.

To summarize, if the DocuSign or paper FARF has been received by the CDCN team, the SF will receive an email with confirmation of processing, corrections needed, or updates.

DocuSign FARF's

The DocuSign FARF is now available. This will be the preferred method to submit FARFS to CDCN. SFs can find the DocuSign FARF on our website in the Forms tab, under the Electronic Fiscal Agent Request Form.

There are many benefits of submitting FARFs electronically through DocuSign. Some of the benefits include:

- Assisting Service Facilitators and CDCN with ensuring that the FARF is accurately completed as all required fields are highlighted and must be completed before submission

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- It will help organize and store documents by significantly reducing the amount of paperwork. SFs receive a confirmation email once the FARF is submitted. This email includes a copy of the completed FARF for SFs to reference.
- If changes are made to the FARF, SF do not need to download a new form or worry about using the wrong version. The DocuSign FARF will always have the most up to date FARF form available to be completed.

CDCN has a DocuSign FARF user guide available to assist with the completion of the FARF. Please utilize this document when completing the FARF.

If a DocuSign FARF was started by a Service Facilitator but not completed and submitted to CDCN, SFs will receive a notice from DocuSign 90 days later that the link has expired. CDCN is not able to access any information from a DocuSign FARF until it is submitted to CDCN.

New Enrollment Packets

DocuSign Packets are the fastest way to enroll, and also has fewer errors upon submission. Employers and Attendants can reference our DocuSign User Guide as well as our Enrollment packet instructions on our website under the Forms tab. These resources will assist in completing the enrollment packets with step by step instructions to ensure completion before submitting the packet to CDCN.

New Enrollment Packet- Attendant

The Attendant packets have a detailed instruction packet to assist with completing the packet. Please encourage all EORs and Attendants to utilize this document to ensure full completion of the packet. This will result in faster processing due to minimalized errors. The instructions have been increased from 6 to 17 pages, as it includes highlighted mandatory fields for each page in the packet as an example for Attendants to reference.

As mentioned previously, instructions for assisting with completing these forms are available on our website under the Forms tab.

New Enrollment Packet- EOR

The Employer of Record packet has also been updated for ease of use. EORs can reference the Employer packet instructions for a step by step guide on completing the enrollment packet, which includes sample pages with highlighted mandatory fields. This Instruction packet is only 6 pages long.

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Form Update: Attendant- Consumer Live-In Determination

The Attendant-Consumer Live-In Determination form has been updated in the packet. This required form can be found on page 6 of the New Enrollment packets for Attendants.

Accurate completion of this form will indicate whether the ATT qualifies for the IRS Difficulty of Care income tax exemption. This form is for any new Attendants completing enrollment.

Enrollment Packets- Review Before Submission

Before submitting any packets to CDCN, it is crucial that Employer of Records and Attendants review the information in their packets to ensure that it is appropriately and correctly filled out. Specifically, any tax related forms for the ATT need to be thoroughly reviewed including the Payroll Tax Exemptions Determination, the Attendant-Consumer Live-In Determination, the W-4, and the VA-4 forms.

The Attendant DocuSign packets are a 2-part process. Once, the Attendant has finished their packet it is then submitted over to the EOR's email address to review, sign and submit the packet to CDCN. It is very important for EORs and Attendants to review the information submitted on their enrollment packets as it will affect how CDCN selects appropriate taxes and payments for Attendants.

CDCN has multiple instructional materials available on our website to assist with the completion of the enrollment packets. Please encourage all EORs and Attendants to utilize these resources before and during the enrollment process.

Update: EIN Requirements for Employer of Records

CDCN would like to inform you of the updates regarding the EOR's Employer Identification Number.

Once the Employer of Record completes their enrollment documentation, CDCN then applies for an Employer Identification Number through the IRS on behalf of the EOR. If the application was unsuccessful, the EOR will be placed on hold with CDCN and will be unable to approve time for their Attendants.

CDCN will notify EORs of this by email which will include the letter shown on this slide. This letter has detailed instructions for the EOR to complete as soon as possible to delay any payments.

If the EIN is not received within 30 days, CDCN will take the necessary steps to end the EOR's account. CDCN will notify the EOR and the Service Facilitator of the need to find a new EOR.

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Overtime Changes

Effective January 1, 2021, Attendants may work up to eight hours of overtime per work week. Attendants who do not live with the member are eligible for overtime payments. The Attendant may not exceed the member's bi-weekly authorized hours.

If an Attendant qualifies for overtime, the Attendant must use an approved Electronic Visit Verification (EVV) method including the EVV mobile application or IVR system.

Live-In Exemption Changes

Effective January 1, 2021, Attendants who live with the member are eligible for the EVV Live-in Exemption. Live-in Attendants may use all forms of electronic time entry including the online portal, EVV mobile application, and IVR system.

If you are a live-in Attendant, you will be required to provide proof of address. Forms of proof of address can include but are not limited to driver's license, voter registration card, banking statement, credit card statement, utility bill statement, or cell phone bill statement.

New Attendants starting January 1, 2021 will be required to provide proof of address during the enrollment process.

Existing live-in Attendants have until June 30, 2021 to provide proof of address. Attendants can submit their proof of address documentation to infoCDVA@consumerdirectcare.com by email, or fax to 877-747-7764. Attendants who do not send in the required documents will not be paid until proper documentation is received by CDCN.

Attendants cannot qualify for both overtime and live-in exemption.

Employee's Hire Date

The Attendants hire date is determined by the Employer.

It is critical that the Employer have the Attendant complete all forms upon hire, so that all Federal and State laws and regulations are followed.

The I-9 form is required to be completed by all new Attendants enrolling in services.

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Enrollment Confirmation

Now that we have determined the Attendant's Hire Date, let's discuss Enrollment Confirmation.

CDCN will send out an Enrollment Confirmation letter to notify Employers that we have received a completed packet, processed the Background Check, and that a worker can **start receiving payments**. At this time, the Attendant can now register for the Web Portal.

This letter will be sent within **5 Business days** from receipt of a **completed** packet.

If the enrollment packet is not complete, then CDCN will contact the Employer and Attendant to let them know what changes need to be made.

The Enrollment Confirmation letter is sent to the Attendant as well as the Employer on file. This letter will outline the Employer and Attendant's CDCN ID numbers, which are needed when registering through the Mobile Application in order to process payment for Attendants.

Submitting Attendant Time

Before we can pay an Attendant, we must have:

- i. A completed Employer packet in our system;
- ii. An active authorization for the Participant; and
- iii. A completed Attendant packet in our system.

There are two ways that Attendants can submit time to be paid. Please note that regardless of the method, the Employer must review and approve the time before it is submitted to Consumer Direct.

The two (2) methods are:

- i. Using our Mobile App, CellTrak; We highly recommend that encourage members to start using our Mobile App for entering time.
- ii. Using our secure web portal;

Electronic Visit Verification (EVV)

Consumer Direct Care Network has chosen CellTrak as our EVV vendor.

An outline and online videos of the Mobile App, showing users how to register and Employers how to approve shifts, are located on our website under the Resource tab in the Training Materials section or by going to www.consumerdirectva.com/training-materials.

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What is EVV?

EVV uses technology to electronically record when Attendants begin and end providing services to Medicaid members.

These systems require a device like a mobile phone or landline to collect Attendant's start and end times and location.

EVV is part of the federal 21st Century CURES Act signed into law on December 13, 2016 which requires states to implement Electronic Visit Verification or EVV.

Mobile Application (CellTrak)

The Mobile Application should be downloaded by the Attendant. The application can be downloaded on the Medicaid members or Attendants device.

The Mobile Application is available for both iPhone and Android and can be downloaded to any smart device that has location services.

The EOR can sign and approve time on the Attendant's device at the end of shift.

The most common devices are a smart phone or tablet.

PLEASE NOTE: In the app store you will see two versions of CellTrak please do not select app version 1.7. it is not the right version!

Also note, only one device can be registered per user. This means that only one Attendant can submit their time per registered device using the Mobile App.

Mobile App Registration

Please enter the License ID **200458** and Authentication code **740083** as outlined on the one-page outline located at www.consumerdirectva.com/training-materials.

The Attendant's Solomon id number is required to register for the Mobile Application. If the Attendant does not have this number, they can call CDCN at 888-444-8182 and one of our Customer Service Reps will provide it to them.

The completed step-by-step registration instructions for the Mobile Application, Web Portal and IVR system can be located on our website at <https://www.consumerdirectva.com/training-materials/>.

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Web Portal

Consumer Direct maintains a web portal that is used by Attendants, Employers and Service Facilitators.

Attendants can use the portal to enter time. However, time entered in the Web Portal is not EVV compliant. Attendants may also view their documents such as pay stubs and W-2s.

Employers can use the portal to approve time that has been submitted by their Attendants. Consumer Direct will not receive the time unless the Employer approves it. The Employer can also view reports applicable to them.

Participants can view utilization reports outlining how much of the authorization the Participant has used so far and how much remains, as well as, view their Attendants' pay stubs.

Service Facilitators can use the portal to view reports applicable to their caseload such as the Participant's utilization report.

CellTrak Interactive Voice Response (IVR)

CDCN's Interactive Voice Response system is another option for Employers to approve time and Attendants to submit time worked to CDCN.

That means that the Attendant will dial a tollfree number from the Consumer's registered phone number to start and stop their shifts.

To use the CellTrak IVR system, the EOR will need to complete a form to register the Consumer's phone number with CDCN.

A copy of the IVR registration form can be found on the CDCN's website under the Forms tab in the Time and Payroll Related Forms section.

This option is available 24 hours/day 7 days/week and is available now

The IVR phone number is 855.967.0581 (English) or 855.967.0582 (Spanish).

The default pin is 1234 unless a custom pin was set.

Service Reports

Spending Summary Report: This report provides an overview of how many authorized hours the Participant has used so far and how many hours are remaining.

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Web Portal Updates- Adjustments

Adjustments are now displayed in the Web Portal for all users. If a shift has been edited, a pencil icon will be displayed. The resulting negative voids the original shift. The new positive shift underneath is what will be paid.

Most Common Reasons for Adjustment are:

- Change in Pay Rate
- Removed Shift
- Adjusted Clock Out Time
- Service Code Change

Web Portal Resources

CDCN wanted to inform you of the different resources available on our website to assist with navigating the Web Portal: The Agency administrator User Guide and the Service Facilitator Web Portal User Guide.

Please utilize these materials when navigating the Web Portal to explore all functions available to SFs and Administrators.

For the SF Portal, Participants are added once a FARF has been received and processed.

Participants, Employer of Records and Attendants must complete enrollment and then register for the Portal in order for their information to populate in the SF Portal. If any Participants are missing from the Service Facilitator Web Portal, please email

infoCDVA@consumerdirectcare.com and we will get them added appropriately. If you are still unable to view a Participant on the Web Portal once these steps have been completed, please reach out to your Agency Admin to have the Participant assigned to your caseload.

Attendant Pay Schedule

All Attendants are paid on the same bi-weekly schedule.

CDCN's two week pay period runs from Thursday to Wednesday.

Time must be submitted by midnight on non-pay week Friday and will be paid on the following pay date according to the pay calendar.

The pay calendar is included as a supplement in the *Attendant Enrollment packet* and can be found on our website under the *Forms* tab in the *Timesheet and Payroll Related Forms* section.

There are two sides of the pay calendar:

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1. The first side looks like a traditional calendar. On the calendar, circles represent pay dates and triangles show post office and bank holidays.
2. The second side shows just the applicable dates. The first two columns indicate the pay period start and end date, the middle column is when the time from that pay period must be submitted to Consumer Direct and the last column shows when the dates from that pay period will be paid.

CDCN Payroll IVR

The CDCN Payroll IVR is a self-serve option. Employees can access hours submitted and respite amounts. Attendants can access pay amounts and hours submitted. You will need your 7-digit Consumer Direct ID number and PIN. The default pin is 1234. This is the same PIN you will use for the landline EVV option. You can change your PIN by emailing infocdva@consumedirectcare.com or calling 888.444.8182.

Patient Pay

Patient Pay is a dollar amount that some participants are required to contribute towards their own care. Patient Pay is determined by local Department of Social Services. Patient pay will be deducted on the dates marked with an asterisk on the pay schedule.

COVID-19 Temporary Attendants

In response to COVID-19, parents and spouses are currently approved to be attendants until August 1, 2021. **If there are any extensions to this date, it will be announced at a later time.**

CDCN has created special enrollment packets specifically for parents or spouses. These enrollment packets can be found under our Forms tab in the "COVID-19: Temporary Attendant Forms" section.

For this temporary process, Time can only be entered via the Web Portal. CellTrak and IVR cannot be utilized. Attendant Code S5126 can only be submitted. Any Respite or Companion Care submissions will be denied.

All temporary Attendants, being the parents and spouses of the Participant, should select **my Participant had an emergency** as the exception reason when submitting time on the Consumer Direct Care Network web portal. All shifts must be submitted within 14 days of the date of service.

The current Employer of Record (EOR) cannot be a paid Attendant. If there needs to be an EOR change, the Service Facilitator will need to submit a Fiscal Agent Request Form (FARF) and the EOR and Attendant will need to submit the required enrollment forms.

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CDCN has created a FAQ for this COVID-19 response. Please review and utilize this document for assistance with any qualifying Participants. This FAQ document can be found under our Forms tab in the "COVID-19: Temporary Attendant Forms" section.

All Services Facilitator questions regarding Appendix K Flexibilities may be directed to the following email address: cccpluswaiver@dmass.virginia.gov

Pay Increase for Attendants

Effective May 1, 2021, Consumer Directed Services Attendants will receive a 6.4% pay increase.

The Northern Virginia base pay rate is now \$13.60,
The Rest of State base pay rate is now \$10.50.

This pay increase will be reflected on the Attendant's paychecks starting May 1, 2021.

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New SF Presentation FAQ 5-2021

1. Is the Presentation available online?

The Meeting Minutes are a full overview of the Presentation, and can be found at www.consumerdirectcare.com/sfforms