

# INSTRUCTIONS FOR THE LONG TERM SERVICES AND SUPPORTS REFERRAL FORM (CP-2)

## **Referral Process for CWA**

The County Welfare Agency (CWA) utilizes this form to refer individuals residing in the community who are seeking nursing facility (NF) placement, assisted living (AL) residences or Waiver programs and are potentially or currently Medicaid eligible or who are converting from private pay to Medicaid to the County Area Agency on Aging/Aging & Disability Resource Connection (AAA/ADRC). The CP-2 is also used by the CWA to verify Medicaid eligibility when referring NF residents who are requesting Waiver services to the Office of Community Choice Options (OCCO) Regional Office. The referral form will serve as verification of financial eligibility and should include a physician-completed PA-4 form.

Referrals need to be made if one of the following scenarios occurs:

- (a) Consumers seeking long term services and supports (LTSS) who, upon initial intake, appear to be eligible for Medicaid Waiver services and may be eligible for an expedited process. In such cases, the CP-2 referral to the AAA/ADRC will be accomplished prior to and/or while the verification and validation process of financial eligibility is being determined.
- (b) Consumers seeking LTSS who do not meet the above requirement but can benefit from home and community-based services (HCBS) that can potentially be provided by other federal, state or locally-funded programs.

## **FORM INSTRUCTIONS:**

### **AAA/ADRC REFERRALS (*for individuals in the community*):**

1. The CWA worker must complete the entire top part of the form including the location of the AAA/ADRC as well as the referral source (CWA) and name of the person making the referral.
2. A Medicaid number must be on the form. A PA-4 is necessary for all NF and Waiver referrals, including AL.
3. The CP-2 referral form can be faxed or emailed to the AAA/ADRC designated staff, where it will be processed for screening, initial options counseling and assessment.

### **OCCO REFERRALS (*for individuals in a NF or AL*):**

4. The CWA worker must complete the entire top part of the form including the location of the OCCO Regional Office (Northern or Southern) as well as the referral source (CWA) and name of the person making the referral.
5. A Medicaid number must be on the form. The resident's date of financial eligibility and income must be recorded in the financial section of the CP-2.
6. The CWA worker must also check the appropriate box in the participant information section indicating interest in either a community-based Waiver or NF placement.
7. If an individual is currently in a NF, include the admission date.
8. A PA-4 is necessary for all NF and Waiver referrals, including AL.
9. The CP-2 referral form can be faxed or emailed to the OCCO Regional Office designated staff, where it will be processed for level of care assessment.

**INSTRUCTIONS FOR THE  
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(Continued)**

**For NF Transitions Only**

*Persons being discharged to community on Waiver or community programs*

- A. OCCO will forward a completed CP-2 form, minus the financial information, to the CWA to verify that an individual who is being discharged to the community from a NF on a Medicaid Waiver is financially eligible.
- B. The CWA completes the financial section of the CP-2 form and returns it to OCCO within three (3) business days.

**Fast Track Referral from CWA**

When a CWA worker wants to refer a consumer for Fast Track, the CP-2 will serve as a referral form. The CWA worker will check the appropriate Fast Track box selection in the participant information section and must then follow these steps:

1. The CWA worker will complete and forward to the ADRC Support System Designee an INITIAL CP-2 to refer a consumer that appears to be eligible for Fast Track while his/her financial application is being processed.
2. The CWA worker will complete a clearly marked FINAL CP-2 and forward to the respective OCCO Regional Office with the completed information section to confirm the financial eligibility/ineligibility determination.