
CDC+ Connection – Your Monthly Source of Updates and Helpful Information

Purchasing Plan Assistance is a Click Away

Before you develop a new Purchasing Plan, it is important to have the most current information about Purchasing Plans and Service Codes. Purchasing Plan Instructions and the Service Code Chart are periodically updated to include new information. Both of these documents are located in the Participant Notebook, Appendix I and Appendix J.

If you are unable to access the Web, please ask your Consultant or your local APD Area CDC+ Liaison for the most recent copies of these two important documents.

The Purchasing Plan Instructions are detailed, step-by-step directions that describe how to complete a Purchasing Plan and include special tips to help you understand the requirements.

The Service Code Chart is a list of all services that may be purchased by CDC+ Participants, depending on the goals and needs identified on a Participant's Waiver Support Plan. This list of services identifies the required credentials of providers, whether a service can be provided by a directly hired employee or not, and any special conditions that must be met before a service can be purchased. The Service Code Chart also provides information about One-Time and Short-Term Expenditures and a list of unallowable expenditures. It is important that all CDC+ Participants and their Representatives be familiar with these documents to minimize errors when writing their Purchasing Plans.

Know the Purchasing Plan Requirements

Every CDC+ Purchasing Plan consists of a minimum of the following 6 pages:

- Page 1 (Name, ID number, Reason for Submission)
- Page 2 (Needs Section)
- Page 3 (Services and Supplies)
- Page 4 (Cash and "Explanation" area)
- Page 5 (Savings Plan, OTEs/STEs)
- Page 6 (Summary and Signatures)

A Purchasing Plan cannot be approved without these six required pages. Also, each page must be numbered consecutively in the order shown, as page 1 of 6, 2 of 6, 3 of 6, etc. This is will assist your Consultant, the Area CDC+ Liaison, and the CDC+ Unit in Tallahassee in assuring that your

plan is complete and no pages are missing.

If you need to use more lines for Services and Supplies than are provided on page 3, two additional pages are provided in the standard Purchasing Plan template. If more than three pages are needed to list your Services and Supplies, please do not attempt to add another page yourself. Please contact the CDC+ Unit in Tallahassee to request a Purchasing Plan that includes the number of pages needed for Services and Supplies.

If you should need additional lines on Page 5 for items you wish to purchase from the Savings section, please ask the CDC+ Unit in Tallahassee to send you a Purchasing Plan that includes extra pages for the Savings section.

Using the current Purchasing Plan is the only way to ensure that your Purchasing Plan calculates correctly through the entire document.

Understanding the Purchasing Plan: Needs Section Guidelines

The purpose of the Needs Section of the Purchasing Plan is to clearly explain how the services you plan to purchase in CDC+ will meet your needs and goals as identified on your Waiver Support Plan. This section must also detail that, if you were approved on the Cost Plan to receive services defined by CDC+ as "restricted," you are planning to purchase at least the minimum amount of services required in CDC+. This section is to be written together by the Consultant and Participant.

The Needs Section is divided into three parts: Waiver Support Plan, Waiver Cost Plan and CDC+ Purchasing Plan. In Column 1, list the needs and goals that were identified in your Support Plan. It would help to group your needs and goals according to the approved services in the Waiver Cost Plan. In Column 2, list the name of the service approved on the Cost Plan to address the need or goal, the number and type of units that were approved, and the number of hours that will be converted on a monthly basis. In Column 3, then list the service and the number of hours you plan to purchase each month in CDC+.

In the future, Purchasing Plans submitted for approval may not be approved if the Needs Section is incorrectly written. For additional guidance, please refer to the Purchasing Plan Instructions in the Participant Notebook, Appendix J.