



agency for persons with disabilities
State of Florida



Consumer/Representative Training
Module 2: Monthly Budgets,
Purchasing Plans and Quick Updates

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Monthly Budgets, Purchasing Plans and Quick Updates

**What is the
Monthly
Budget**

**What is a
Purchasing
Plan**

**What is a
Quick
Update**



**iConnect
Amount**

**Consultant
and OTE/STE**

**Discount Rate +
Administrative fees**



**Change
in
iConnec
t**



**Change
to CDC+
Monthly
Budget**



**Support
Plan**

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**Cost
Plan**

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**Purchasing
Plan**

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PURCHASING PLAN



Allowable Purchases

Any item that is an allowed purchase using CDC+ funds must be related to the Consumer's long-term care needs or need for community supports as identified in the Consumer's support plan. Before a Consumer may purchase services or supports, the services or supports must be approved as being clearly associated with meeting the Consumer's identified needs and goals. A complete list of services available in the CDC+ Program is included in Chapter 4 of this Handbook.



Payment to Rep, Gifts or Loans, Rent or Mortgage, Utilities, Lottery Tickets, Alcohol or Tobacco, Entertainment Activities or Devices, Swimming pools or Spas, Educational equipment or supplies, Lessons, Home and Vehicle repairs or maintenance



Restricted Services VS Unrestricted Services



Restricted Services

Adult Dental Services	Behavior Analysis Services	Behavior Analysis Assessment	Behavior Assistant Services	Dietitian Services
Durable Medical Equipment and Supplies	Environmental Modifications	Occupational Therapy	Occupational Therapy Assessment	Personal Emergency Response System Installation
Physical Therapy	Physical Therapy Assessment	Private Duty Nursing	Respiratory Therapy	Respiratory Therapy Assessment
Skilled Nursing	Specialized Mental Health Services	Speech Therapy	Speech Therapy Assessment	Vehicle Modifications



Unrestricted Services

Adult Day Training	Advertising	Companion Services	Consumable Medical Supplies	Gym Membership
In-Home Support Services	Other Therapies	Over-the-Counter Medications	Parts and Repairs for Therapeutic or Adaptive Equipment	Personal Care Assistance
Personal Emergency Response System (PERS)	Residential Habilitation Services	Respite Care	Seasonal Camp	Specialized Training
Supported Employment	Supported Living Coaching	Transportation		



Critical Services

- Health, safety, or welfare would be at risk
- Requires two valid emergency backup providers
- Personal Care Assistance (PCA) service is **ALWAYS** considered a critical service



Quick Update

- **Replace a current authorized provider**
- **Change a vendor in Savings, OTE or STE**
- **Change only the estimated date of purchase for a Savings item or the End Date of an OTE or STE**
- **Add or replace a service or support in the Savings Section**
- **Add an emergency back-up provider**



**Monthly
Budget**

**Purchasing
Plan**

**Quick
Update**



Thank you for your participation

For additional questions, please contact:

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