



## **Instructions for Quick Update Form (Version 4.0 16-5-10)**

These instructions describe how to correctly complete a Quick Update form. Begin by downloading the most recent version of the Quick Update form from APD's CDC+ website at: <http://apdcares.org/cdcplus/docs/appendix/quick-update-instructions.pdf>. If you do not have access to the Web site, please ask your consultant to give you the most recent version.

**Important:** A Quick Update form cannot be used for retroactive replacements, changes, or additions to the Purchasing Plan. All changes must be for future needs. The Quick Update form must be received by the CDC+ program before the requested change is needed.

### **The Purpose of the Quick Update Form**

A Quick Update form should be used to make changes to the current Purchasing Plan for an upcoming need or situation. For example, to replace a current provider with a new provider or to extend the purchase date of a savings item. As a standard practice, the Quick Update form and all supporting documents should be submitted at least one week before the start date of the change. However, it is recommended to send in all Quick Update forms and new provider packets one to two weeks before the provider is needed to begin work to allow time to address any questions with the request.

**The following are the only reasons that a Quick Update form can be used:**

1. To replace a current authorized provider with a new provider who must start within seven to ten days. The rate of pay, number of units, employer tax status, and the total amount for the service must remain the same.
2. To change the provider of an approved item in Savings or the OTE/STE section to allow the participant or representative to be reimbursed.

**NOTE:** The participant or representative cannot be reimbursed for paying a directly hired employee OR independent contractor with his/her own funds; the F/EA must be able to report all earnings of these provider types to the IRS and cannot do so through reimbursement.

3. To change the estimated purchase date for a Savings item or the "end date" of an approved One-Time or Short-Term Expenditure.
4. To add or replace an item in the Savings section of the Purchasing Plan completely.
5. To add an Emergency Back-Up provider for a service in the Services Section.

**Important:** the Quick Update form can only have **ONE** request per sheet. Multiple changes require filling out multiple Quick Update forms.

### **Completing a Quick Update Form**

Be sure to fill out the form completely. Be sure to list the date of the last effective Purchasing Plan, the consumer's name, and the CDC+ consumer ID number.

1. **Section A:** Check the reason for submitting the Quick Update form and fill in all blanks to show the effective date of the change. The letters directly to the right of section A indicate which other section(s) will need to be filled in (B & C, B & D, or D only)
2. **Sections B and D:** Always circle what section the change is to take place: Services (R), Savings (S), One-Time Expenditures (E), or Short-Term Expenditure (T). Be sure to check the box under "Critical" to state if the provider is the primary provider for a Critical service (Y or N) or if they are an Emergency Back-Up provider (E)
3. **Section C:** When replacing a provider with another, make sure that the rate of pay, number of units, employer tax status, and the total amount for the service remains the same.
4. **Sections B, C, and D:** when changing a Savings, OTE or STE item, be sure to fill in the "Date" box to show the new purchase date.
5. If a currently authorized provider is being added, list their provider ID number. If a new provider is being added, check the appropriate box and be sure to submit their new hire paperwork.
6. Sign and date the form.

### **After Completing and Signing the Quick Update Form:**

1. Include a copy of the Purchasing Plan page where the changes are to be made.
2. If applicable, include Employee or Vendor Packets for the new providers.
3. Submit the Quick Update form(s) along with supporting documents to the CDC+ consultant to review and forward to APD/CDC+ for processing.