



Instructions on completing the Community Transition Services Purchase Request Form

When you are notified by Veridian that the participant’s approved Plan of Care has been received and processed, you are able to submit purchase requests on the Community Transition Services (CTS) Purchase Request Form.

These instructions will help you properly complete the CTS Purchase Request Form. It provides an overview of the steps in the purchasing process, an outline of the information needed to process different purchases and payment types, and tips for successful processing.

Process outline

- ✓ The Case Manager submits the proposed Plan of Care to the 1915i Medical Services Administrator for approval.
- ✓ The Administrator sends the approved Plan of Care to Veridian and we notify the Case Manager of its receipt.
- ✓ The Case Manager works with the participant to identify purchases and submit them to Veridian for processing on the CTS Purchase Request Form.
- ✓ Veridian receives and processes the Plan of Care and notifies the Case Manager about submitting the CTS Purchase Request Form to Veridian.
- ✓ Veridian reviews the CTS Purchase Request Form for accuracy and notifies the Case Manager if the form requires any revisions.
- ✓ Veridian processes the CTS Purchase Request Forms within 10 business days of receipt.
- ✓ Veridian notifies the Case Manager when payments have been issued to the vendors (as appropriate).

Completing the purchase type information

The CTS Purchase Request Form has sections based on the four main categories of purchases that are authorized through Community Transition Services: Utility set up, Housing preparation, Household and Adaptations. Each main category has subcategories as identified in the table below:

Utility set up	Household preparation	Household	Adaptations
Heating	Security deposit	Furniture	Assessment
Water	Movers	Window coverings	Home adaptations
Phone	Health and safety	Bed and bath linens	
Electric		Food preparation	
		Kitchen supplies	
		Cleaning supplies	

When you have identified the purchases that are needed, fill in the required information under the appropriate section of the form.

Please keep the following in mind when submitting the CTS Purchase Request Form:

- Include all requested supporting documentation for the question (e.g. invoice, bill or shopping cart) A purchase cannot be processed without valid supporting documentation.

- Verify the completeness and accuracy of the CTS Purchase Request Form before submitting it to Veridian. Incomplete CTS Purchase Request Forms may require a revision in order to be processed and can delay the purchase of the item.
- Submit all CTS Purchase Request Forms within the 180 day authorization period. Purchase requests submitted near the end of the authorization period run the risk of not being processed due to falling outside of the approved timeframe.

Completing the purchase type

Utility set up

Please add a checkmark next to one purchase type.					
Purchase type					
1	Utility set up	<input type="checkbox"/> Heating	<input type="checkbox"/> Water	<input type="checkbox"/> Phone	<input type="checkbox"/> Electric

UTILITY SET UP (INCLUDING DEPOSIT)	
<i>Utility payments will be paid by paper check and mailed to the company.</i>	
2	Company name: <input type="text"/>
3	Company street address: <input type="text"/> City, state and zip code: <input type="text"/>
4	Company phone number: <input type="text"/>
5	Account number: <input type="text"/>
6	Customer name on account: <input type="text"/>
7	Street address for service: <input type="text"/> City, state and zip code: <input type="text"/>
8	I included a copy of the utility bill(s): <input type="checkbox"/> Yes <input type="checkbox"/> No

1. **Utility set up:** Check the box next to the type of utility service being set up.
2. **Company name:** Enter the name of the utility company.
3. **Company street address:** Enter the company's address where the payment should be sent.
4. **Company phone number:** Enter the company's phone number.
5. **Account number:** Enter the participant's account number with the utility company as listed on the bill.
6. **Customer name on the account:** Enter the participant's name.
7. **Street address for service:** Enter the participant's address.
8. **I included a copy of the utility bill(s):** Check Yes and include a copy of the utility bill with the submitted CTS Purchase Request Form.

Housing preparation

Please add a checkmark next to one purchase type.			
Purchase type			
1 Housing preparation	<input type="checkbox"/> Security deposit	<input type="checkbox"/> Movers	<input type="checkbox"/> Health and safety
HOUSING PREPERATION PURCHASES			
<i>Housing preparation purchases can be made by paper check mailed to the company or electronic transfer to the company's bank account.</i>			
2 Preferred payment type:	<input type="checkbox"/> Paper check <input type="checkbox"/> Electronic transfer		
3 Street address for service:	<input type="text"/>		
City, state and zip code:	<input type="text"/>		
Proof for purchase			
4 I included either an invoice or a shopping cart showing the item:	<input type="checkbox"/> Yes <input type="checkbox"/> No		

- Housing preparation:** Check the box next to the type of housing preparation being provided.
- Preferred payment type:** Check the box next to form of payment Veridian will issue.
- Street address for service:** Enter the participant's address.
- Proof for purchase:** Check Yes and include a copy of the invoice or shopping cart containing the item on the submitted CTS Purchase Request Form.

Household

Please add a checkmark next to one purchase type.			
Purchase type			
1 Household	<input type="checkbox"/> Furniture	<input type="checkbox"/> Window coverings	<input type="checkbox"/> Bed and bath linens
Purchase type			
Household	<input type="checkbox"/> Food preparation	<input type="checkbox"/> Kitchen supplies	<input type="checkbox"/> Cleaning supplies

HOUSEHOLD PURCHASES		
<i>Household purchases can be paid by paper check to the store or online credit card purchase by Veridian Fiscal Solutions.</i>		
2 Preferred payment type:	<input type="checkbox"/> Paper check <input type="checkbox"/> Credit card payment	
3 Store name:	<input type="text"/>	
4 Quantity of item to be purchased:	<input type="text"/>	
5 Detailed description of the item:	<input type="text"/>	
6 Street address for delivery (not P.O. Box):	<input type="text"/>	
	City, state and zip code:	<input type="text"/>
	Attention to:	<input type="text"/>
7 Delivery instructions (if any):	<input type="text"/>	

Proof for purchase	
8 I included either an invoice or a shopping cart showing the item:	<input type="checkbox"/> Yes <input type="checkbox"/> No

- Household:** Check the box next to the type of household item being provided.
- Preferred payment type:** Check the box next to form of payment Veridian will issue.
- Store name:** Enter the name of the store that should be issued payment.
- Quantity of item to be purchased:** Enter the quantity of the item to be purchased.
- Detailed description of the item:** List details about the item being purchased. These details should allow Veridian to confirm the item to be purchased by verifying it against the item description in the included invoice or shopping cart.
- Street address for delivery:** Enter the address where the item should be shipped.
- Delivery instructions:** List any applicable delivery instructions for Veridian to include when making the purchase.
- Proof for purchase:** Check Yes and include a copy of the invoice or shopping cart containing the item on the submitted CTS Purchase Request Form.

Adaptations

Please add a checkmark next to one purchase type.	
Purchase type	
1 Adaptations	<input type="checkbox"/> Assessment <input type="checkbox"/> Home adaptations

ADAPTATIONS	
<i>Adaptation purchases can be made by paper check to the store, online credit card purchase by Veridian Fiscal Solutions or electronic transfer to the company.</i>	
2 Preferred payment type:	<input type="checkbox"/> Paper check <input type="checkbox"/> Electronic transfer <input type="checkbox"/> Credit card payment
3 Store name:	<input type="text"/>
4 Quantity of item to be purchased:	<input type="text"/>
5 Detailed description of the item:	<input type="text"/>
Street address for delivery (not P.O. Box):	<input type="text"/>
6 City, state and zip code:	<input type="text"/>
Attention to:	<input type="text"/>
7 Delivery instructions (if any):	<input type="text"/>

Proof for purchase	
8 I included either an invoice or a shopping cart showing the item:	<input type="checkbox"/> Yes <input type="checkbox"/> No

- 1. Adaptations:** Check the box next to the type of adaptation(s) being provided.
- 2. Preferred payment type:** Check the box next to form of payment Veridian will issue.
- 3. Store name:** Enter the name of the store that should be issued payment.
- 4. Quantity of item to be purchased:** Enter the quantity of the item to be purchased.
- 5. Detailed description of the item:** List details about the item being purchased. These details should allow Veridian to confirm the item to be purchased by verifying it against the item description in the included invoice or shopping cart.
- 6. Street address for delivery:** Enter the address where the item should be shipped.
- 7. Delivery instructions:** List any applicable delivery instructions for Veridian to include when making the purchase.
- 8. Proof for purchase:** Check Yes and include a copy of the invoice or shopping cart containing the item on the submitted CTS Purchase Request Form.

Completing the payment information

Depending on the purchase type, the payment may be issued as a paper check, Electronic Funds Transfer (EFT) or via a credit card. The applicable options for each purchase type are listed under the purchase section and there is space to complete the requested information.

Paper check

1 If paying with a paper check, please complete the following:	
Payee (business or person you are paying):	<input type="text"/>
2 Amount owed (including fees):	<input type="text"/>
3 Company street address:	<input type="text"/>
City, state and zip code:	<input type="text"/>
4 Attention to:	<input type="text"/>

1. **Payee:** Enter the name of the business or person to whom payment is being issued.
2. **Amount owed:** Enter the amount of the payment as indicated on the proof of payment you include with this form.
3. **Company street address:** Enter the company's address to where the payment should be sent.
4. **Attention to:** If requested, enter the name of the person to whom the payment should be directed to.

Electronic Funds Transfer

If paying with an electronic transfer, please complete the following:	
1 Account name (checking or savings):	<input type="text"/>
2 Account number:	<input type="text"/>
3 Routing number of financial institution:	<input type="text"/>
4 Amount owed (including fees):	<input type="text"/>
5 I provided a voided check:	<input type="checkbox"/> Yes <input type="checkbox"/> No

1. **Account name:** Enter whether the account receiving the transfer is a checking or a savings account.
2. **Account number:** Enter the account number of the account receiving the transfer.
3. **Routing number of financial institution:** Enter the routing number of the financial institution where the account receiving the transfer is held.
4. **Amount owed:** Enter the total amount owed. This amount should include the amount of the purchase and any applicable fees.
5. **I provided a voided check:** Check Yes and include either a voided check or direct deposit slip from the financial institution.

Online purchase

If purchasing online with a credit card, please complete the following:	
1 Website name:	<input type="text"/>
2 Website URL (www.example.com):	<input type="text"/>
3 Item/product name:	<input type="text"/>
4 Item/product number:	<input type="text"/>

1. **Website name:** List the name of the website where Veridian is purchasing the item.
2. **Website URL:** List the web address of the page containing the item to be purchased. Copy and paste the URL to help ensure the item can be found on the website.
3. **Item/product name:** List the name of the item or product to be purchased.
4. **Item/product number:** List the item or product number of the item or product to be purchased.