

## Operational Guidelines for AWC Goods and Services

### Guiding Principle

UCP Agency with Choice (AWC) wants to ensure that we are providing support to participants and their families who have chosen to utilize Goods and Services (G&S).

### Purpose

To provide direction on how to handle the set up and process of Goods and Services.

### Procedure

1. The Supports Coordinator (SC) submits the referral at:  
[UCP Central PA Referral for Agency with Choice Services](https://app.smartsheet.com/b/form/395ebfdce97d4ffd9f4c268769f5a046)  
<https://app.smartsheet.com/b/form/395ebfdce97d4ffd9f4c268769f5a046>
2. The Intake Coordinator (IC) will contact the SC within three business days with any questions regarding the referral and contact the Managing Employer to discuss and schedule the intake.
3. The intake will be completed by the IC, and authorization will be submitted to the SC.
4. Upon completion of the intake and receipt of authorization, the G&S will begin.
5. The Manager will reach out to the vendor for an invoice for payment and give it to the Clerical Assistant for processing.
6. Clerical Assistant will
  - a. verify the receipt of and/or the use of the G&S.
  - b. create a “scheduled” service to bill in Matrix.
  - c. process a purchase order (PO) for payment, or the Manager will pay the invoice via credit card.
7. Manager will
  - a. approve the PO and forward to Accounts Payable for processing *or*
  - b. send credit card confirmation of payment to Clerical Assistant.
8. Once the check has been mailed for payment, fiscal will verify the payment of the PO via spreadsheet weekly.
9. Clerical Assistant will complete the scheduled service for billing in Matrix
10. Manager verifies completion of schedules monthly.