



Greetings CFS SDS Families,

Below you will find a “cheat sheet” on what is needed when submitting invoices for reimbursement. Should you have any questions, please reach out to your assigned FI Program Manager. You can also find this cheat sheet on our website along with our SDS Policy and Procedure Manual. **All ***bolded Categories** require an approved justification forms. **Approved justifications should be submitted with each invoice submission.**

IDGS Categories:

*****Camp-** Needs approved justification form, proof of payment if reimbursed to you, the invoice must have a paid in full note or a 0 balance. Must have proof of attendance- i.e a letter stating individual has attended the camp. If reimbursed to the camp- make sure you select the correct vendor for paid too

*****Community Classes-** Needs approved justification form for the specific class along with invoice/proof of payment once the class has been attended. If the reimbursement is made out to the vendor- need invoice number in description with a balance and paid to vendor. If there is an increase in price or frequency to the class or a change in vendor, please have your support broker complete a new justification form.

Coaching and Education for Parents/Spouses/advocates- Prior to attending parents/advocates should reach out to Jennifer Solis with the following information- web link, pricing, specifics and would make the determination. Once approved, please include approval email in the invoice submission along with the paid invoice/receipt

Clinical Consultants Independent Contractors (non-Direct)-families should email the FIPM to request a justification form and attestation form to be completed by the clinician. Once approved have clinician complete invoice form and family would submit it in evero for

payment. You should attach the invoice/proof of payment and approved justification form when submitting for reimbursement

Clinical Consultant Direct Provision of Therapies- families should email the FIPM to request justification form and attestation form to be completed by the clinician. Once Approved by Jenn have clinician complete an invoice form and individual/design submit via evero for payment. You should attach the invoice and approved justification form when submitting for reimbursement

*****Health Club/Organizational Memberships-** no need for justification form to be submitted for a gym membership however, memberships for everything else must have an approved justification form (*including membership for YMCA*). When submitting invoices for membership, you should attach the approved justification form and proof of payment/receipt. If membership is required to be paid in advance, invoice/reimbursement request must be submitted on a prorated basis or at the end of the membership term. For example, \$1200 annual membership could be reimbursed at \$100 each month. Note - Membership is for the person receiving services only; no family memberships allowed with IDGS funding. Please utilize the description box to indicate what the reimbursement is for. Using the example above- if submitting the invoice on a monthly basis- you should state in the description box 1/12 month.

*****Household Related Items and Services-** this requires an approved justification form- no exceptions. Families should submit invoice/receipt along with approved form after the item has been purchased or service has been rendered.

Interpretation Services- Submit Invoice/Proof of Payment once interpretation service has been provided. Note - funding is not available for translation of written words, only live interpretation. No justification form is needed.

Self-Directed Staffing Support- the SD Staffing Support person needs to be cleared as a 1099 vendor and complete background check. Also a SD Staffing Support Agreement is

needed and you should return signed copy to FI Program Manager. Submit SD Staffing Support Invoice and staffing support agreement into EVERO for payment.

*****Transition Programs for Individuals with IDD-** Needs an approved justification form. Family must submit Invoice/Proof of Payment once session has been completed/attended along with the approved justification time.

Transportation- This is for reimbursement to and from a IDGS related activity or when staff is working. Example being- if you (parent) are driving to and from a community class that can be reimbursed through the budget- you can put in for reimbursement to and from the class. We CAN reimburse for public transportation, taxi, ubers, miles driven etc. If a staff is driving or in the car working with person receiving services and they are going to somewhere out of state- an out of state justification form must be submitted/approved and uploaded to the reimbursement submission. Families who have recurring transportation- example being- person receiving services goes to the gym every Monday and Friday-and gym membership is paid for through the budget- you can utilize our reimbursement log and request reimbursement at the end of the month (log can be found on our website). Parking fee and **tolls are not reimbursable expenses for the self-directing individual via IDGS**. They can be reimbursed via staff activity fee if the staff is driving to a service-related activity. If a parent is driving person receiving services to a camp THAT IS NOT REIMBURSED THROUGH THE BUDGET VIA IDGS- they cannot be reimbursed through IDGS Transportation (in this event- you can put it in as OTPS Personal Use Transportation). **If you are traveling out of state, an out of state justification needs to be completed and attached**. IDGS Transportation should **not** be utilized for travel to and from school, medical appointments or anything outside IDGS related activities (when not with staff). Addresses/locations should be completed to clearly indicate where the travel was too and from.

Live in Caregiver-LIC (Live in Caregiver) must go through employee onboarding process to be available to provide direct support if needed. We also must have 2 completed LIC agreements on file- one is between you and the LIC & the other is between CFS and the person receiving services.

OTPS Categories:

Phone- for landline: need itemized bill attached to reimbursement request-cost of phone line divided by adults in the household is what you would request for reimbursement. Example landline is \$20 - parent and person receiving services live in the house- you would request \$10 to be reimbursed (bill divided by amount of adults in the house). Either need autopayment to be set up or proof of payment of the full bill. For cell phone: Phone line identified on bill and equation followed for all taxes/fees on the phone plan (Taxes & Fees/ # of lines= Percentage of fees covered) Total Cellphone Line Reimbursement Equation (% of Fees Covered + Line costs = Total Phone Reimbursement) We CAN NOT reimburse for insurance and accessories or phone. In description indicate dates of service (MM/YY). Must attach Proof of payment-(auto pay qualifies as proof of payment) .

Internet- Invoice must have dates of service and total cost. If a person who receives services lives with family- we would divide internet total by how many people in the house. Same example here- if person receiving services lives with mom and internet is \$50 you would request \$25. Proof of Payment is needed, can be a paid in full bill/invoice, bank statement or auto pay

*****Software related to individuals disability-** must submit an approved Justification Form, Itemized receipt and proof of payment.

Staff Activity Fees- Must have itemized (with full details) receipt for activities out in the community. Staff must be on the clock working at the time of the receipt/invoice. Proof of payment must be on receipt. cannot reimburse for activities in the home, grocery, or convenience store shopping and/or projects that require supplies. This is approved by senior firm who confirms staff were on the clock at the time of the invoice.

Staff Advertising- submit receipt and proof of payment. No justification form needed.

*****Staff Training**-must submit approved OTPS justification form attached along with itemized receipt and proof of payment

Personal Use Transportation- for travel reimbursement to and from activities unrelated to IDGS. Note –**transportation to and from doctors appointments cannot be reimbursed.** Cannot reimburse for airline tickets unless it has been cleared by Jennipher. If travel is out of state an out of state justification form needs to be attached. Submission should clearly indicate where the person traveled too and for what reason.

Clothing- must attach receipt of clothing/shoes and proof of payment. CAN reimburse for uniforms via clothing line.

*****Board Stipend-** Needs an approved Justification Form attached with the itemized grocery receipt with a proof of payment. We CAN NOT reimburse for food paid for with SNAP benefit/snap. We CAN NOT reimburse for any non-food items or bottle deposits. If there is a receipt that includes items that are not reimbursable please deduct that from the total and put in the description box/highlight the items you are seeking reimbursement on the receipt-be sure to attach the approved justification form with each entry.

Utilities- you can submit bill with dates of services/total cost. Like phone and internet- if the person does not live independently, you would divide the total by the amount of adult-people in the house. For example -electric bill is \$100 and person receiving services lives with one parent, you would request reimbursement for \$50. We also need proof of payment- auto pay is okay. If you are not enrolled in autopayment and there is still a balance on the invoice then you would either need screenshot of approved transfer or bank account transaction. You should not be for requesting reimbursement for Internet or Phone out of Utilities. Indicate what you are requesting in the description box. I.E- Jane Doe's portion of utility bill- \$100/2

*****Other Goods and Services that Increase Independence-** need approved justification form, receipt and proof of payment. Those three items should be submitted for reimbursement.

*****Other Goods and Services Related to Health and Safety-** need approved justification form, receipt and proof of payment. Those three items should be submitted for reimbursement.

Family Reimbursed Respite- FRR submissions are reviewed by the senior fipm. They will check the times on the FRR claim form to ensure staff did was not on the clock at the times requested on the form. FRR claims must be completely filled out and signed off by individual/designee and person who provided the relief. Hourly rate must be at or above minimum wage. When submitting the FRR form please ignore the “add services” button.

Additional Notes:

- Need updated class justification form for increase in rate, duration and new class.
- Need to ensure justification form does not have an expiration date.
- Cannot reimburse for tolls/parking under transportation. If this is something that staff accrued while working with person who receives services, they can submit via staff activity fees.
- You can find justification forms, transportation logs, FRR claim form, CFS Policy and Procedure Guide, CFS Self Directed Supports Video Library and more on our website:

<https://www.cfsny.org/self-directed-services/#families>

Please go to the next page for CFS SDS contact information!

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For employee related matters please email:
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**Meet our
team...**

**We have many other staff at the CFSNY office in HR, Payroll, Finance and Administration as well.