CFS Self-Directed Services (SDS)

Family Invoice Reimbursement Cheat Sheet

Hello CFS SDS Families,

To help make the reimbursement process easier, we have created this quick reference guide outlining what is required when submitting invoices through Evero.

Important: All categories marked with *** require an **approved Justification Form**. A copy of the approved justification must be attached every time you submit a reimbursement request for that service or item.

If you have questions, please contact your assigned **FI Program Manager (FIPM)**.

You can also find forms, transportation logs, policies, videos, and other resources on the CFS website: **https://www.cfsny.org/self-directed-services/#families**

Before You Submit Any Reimbursement

✅ **Make sure invoices are complete and legible**

✅ **Include proof of payment when required**

✅ Attach proof of attendance if applicable

✅ **Upload approved justification forms (if applicable)**

✅ **Use the description box to clearly explain the reimbursement**

✅ **Verify Medicaid is active (payments cannot be processed if Medicaid is inactive)**

✅ **Check that justification forms have not expired**

✅ Expect payment 30 days day from submission.

IDGS Categories

***Camp

Required:

- Approved Justification Form for the camp
- Copy of DOH Permit
- Invoice
- Proof of Payment (if reimbursing family)
- Invoice showing **Paid in Full** or **$0 Balance**
- Proof of attendance (attendance letter or confirmation)

Important:

- Registration alone does not prove attendance.
- If paying the camp directly, select the correct vendor in Evero.

***Community Classes

Please note we approve classes not vendors. Each different class must have their own approval even if taken at same vendor.

Required:

- Approved Justification Form for the specific class
- Invoice showing class dates
- Proof of Payment (after classes have been attended)

If Paying Vendor Directly:

- Include invoice number in description box
- Enter remaining balance
- Select vendor as payment option
- Inform your FIPM to link vendor to your account.

New Justification Required If:

- Class cost increases by more than $50

- Class frequency changes
- Vendor changes

Coaching & Education for Parents, Spouses, and Advocates

Before Registering: Send the following information to **your FIPM**:

- Website link
- Cost
- Training/Program details

Required for Reimbursement:

- Approval email from Jennipher
- Paid receipt/invoice

Clinical Consultants (Independent Contractors - Non-Direct Services)

Before Services Begin:

- Contact your FIPM for:
    - Attestation Form

Required for Reimbursement:

- Approved Justification Form
- Clinician Invoice
- Proof of Payment

Clinical Consultants (Direct Therapy Services)

Before Services Begin:

- Contact your FIPM for:
    - Attestation Form

Required for Reimbursement:

- Approved Attestation Form
- Current Treatment Plan
- Detailed Clinician Invoice

Helpful Reminder:

- Therapists are required to provide periodic progress reports and treatment plans as required.

How are therapist rates determined?

To ensure rates are fair and consistent, therapist rates are compared to wage data published by the U.S. Bureau of Labor Statistics (BLS) Occupational Employment and Wage Statistics (OEWS)

Important: A therapist's approved rate **cannot exceed the 90th percentile wage** for their profession in the state where services are provided.

https://www.bls.gov/oes/current/oessrcst.htm

***Health Club & Organizational Memberships

Gym Memberships

- No Justification Form required

All Other Memberships (including YMCA)

Required:

- Approved Justification Form
- Proof of Payment

Important:

- Membership must be for the person receiving services only.
- Family memberships or any membership that add another person are not reimbursable.
- Annual memberships must be reimbursed on a prorated basis.

Example:

- $1,200 yearly membership
- Submit $100/month reimbursement requests

Description Box Example:

- "Membership Month 1 of 12"

***Household Related Items & Services

Required:

- Approved Justification Form
- Receipt/Invoice
- Proof of Payment

No exceptions.

Interpretation Services

Required:

- Invoice
- Proof of Payment

Important:

- Covers live interpretation only.
- Translation of written documents is not reimbursable.
- No Justification Form required.

Self-Directed Staffing Support

Requirements Before Payment:

- Worker must be approved as a 1099 Vendor
- Background check completed
- Staffing Support Agreement signed and returned to FIPM

Required for Payment:

- SD Staffing Support Invoice
- Signed Staffing Support Agreement

***Transition Programs for Individuals with IDD

Required:

- Approved Justification Form
- Invoice
- Proof of Payment

Submit only after attendance is completed.

IDGS Transportation

What is IDGS Transportation?

IDGS Transportation is transportation related to an approved IDGS-funded activity or service. This includes travel to and from activities that are being supported through the individual's Self-Direction budget, such as Community Classes, camps, gym memberships, or when staff is working with the individual during a service-related activity.

Examples of Transportation That May Be Reimbursed:

✅ Travel to and from a Community Class funded through IDGS
✅ Travel to and from an approved camp funded through IDGS
✅ Travel to and from a gym or membership activity funded through IDGS

✅ Mileage, public transportation, Uber/Lyft, or taxi costs related to an IDGS activity
✅ Transportation when staff is working with the individual during a service-related activity

What You Need to Submit:

✅ Transportation details showing where travel began and ended
✅ Transportation receipts or mileage submission

✅ Out-of-State Justification Form (if applicable)

May Be Reimbursed:

✅ Mileage
✅ Public transportation
✅ Taxi
✅ Uber/Lyft

Cannot Be Reimbursed:

❌ School transportation
❌ Medical appointments
❌ Parking and tolls when a parent or individual is driving

Important:

- Clearly enter starting and ending locations.
- Select "Miles" when requesting mileage reimbursement.
- Recurring transportation may be submitted using the CFS reimbursement log.
- If traveling out of state, an approved Out-of-State Justification Form must be attached.
- You can “favorite” your frequently used addresses in evero.

Live-In Caregiver (LIC)

Requirements

- LIC must complete employee onboarding.

- CFS must have:
  - LIC Agreement between family and caregiver
  - LIC Agreement between CFS and participant

Food & Utility Reimbursements

- Submit only the caregiver's share.

Example:

- Utility bill = $100
- 2 adults in home
- Reimbursement request = $50

Payments cannot be made directly to the LIC.

OTPS Categories

Phone

Landline

Required:

- Itemized bill
- Proof of Payment

Calculation: Monthly phone cost divided by number of adults in household

Example:

- $20 phone bill
- 2 adults in household
- Reimbursement request = $10

Cell Phone

Required:

- Itemized bill showing participant's line
- Proof of Payment

Not Reimbursable:

❌ Phone insurance

❌ Accessories

❌ Cost of phone/device

Description Box: Include dates of service (MM/YY).

Internet

Required:

- Invoice showing service dates
- Proof of Payment

Calculation: Internet bill ÷ number of household members sharing service

Example:

- Internet bill = $50
- 2 people in household
- Reimbursement request = $25

***Software Related to Disability

Required:

- Approved Justification Form
- Itemized Receipt
- Proof of Payment

Staff Activity Fees

Required:

- Itemized receipt
- Proof of Payment

Important:

- Staff must be actively working at the time.
- Reviewed and approved by Senior FIPM.

Not Reimbursable:

❌ In-home activities

❌ Grocery shopping

❌ Convenience store purchases

❌ Projects requiring supplies

Staff Advertising

Required:

- Receipt
- Proof of Payment

No Justification Form required.

***Staff Training

Required:

- Approved OTPS Justification Form
- Itemized Receipt
- Proof of Payment

Personal Use Transportation

Personal Use Transportation is transportation related to activities that are **not IDGS-funded activities**, but still support the person's goals, independence, or community participation. This category is used when the transportation does not qualify under IDGS Transportation.

What You Need to Submit:

✅ Transportation receipts or mileage information
✅ Description of where the individual traveled and the purpose of travel
✅ Out-of-State Justification Form (if applicable)

Helpful Reminders:

- Uber/Lyft fares including tolls and tips may be reimbursed.

Cannot Be Reimbursed:

❌ School transportation
❌ Medical appointments

Important:

- Out-of-state travel requires approved Out-of-State Justification Form.
- Clearly explain where the person traveled and how it relates to persons valued outcomes.

Clothing

Required:

- Receipt
- Proof of Payment

Note: Uniforms may be reimbursed under clothing.

***Board Stipend

Required:

- Approved Justification Form
- Itemized grocery receipt
- Proof of Payment

Not Reimbursable

❌ SNAP-funded purchases

❌ Non-food items

❌ Bottle deposits

Tip: Highlight reimbursable items and deduct non-reimbursable items before submitting.

Utilities

Required:

- Utility bill showing service dates
- Proof of Payment

Calculation: Total utility bill ÷ number of adults in household

Example:

- Electric bill = $100
- 2 adults in home
- Reimbursement request = $50

Description Example: "Jane Doe's portion of electric bill ($100 ÷ 2)"

Do Not Submit:

❌ Internet bills under Utilities

❌ Phone bills under Utilities

***Other Goods & Services That Increase Independence

Required:

- Approved Justification Form
- Receipt
- Proof of Payment

***Other Goods & Services Related to Health & Safety

Required:

- Approved Justification Form
- Receipt
- Proof of Payment

Family Reimbursed Respite (FRR)

Required:

- Fully completed FRR Claim Form
- Signatures from:
  - Individual/Designee
  - Relief Provider

Important:

- Senior FIPM reviews all submissions.

- Staff cannot be clocked in during FRR hours.
- Hourly rate must meet or exceed minimum wage.
- Ignore the "Add Services" button when submitting.

Additional Reminders

Medicaid

CFS is unable to reimburse for services when Medicaid is not active. Please make sure to work with your Care Manager to ensure your Medicaid remains active.

Budget Reset Tips

If your budget is ending soon and you want expenses charged to the previous budget year:

- Submit by the 10th of the following month.
- Use the actual service date from the previous budget year.

Example:

- Budget resets: 8/1/2026
- Service received: 7/31/2026
- Enter Date of Service: 7/31/2026

Use the Description Box to indicate which budget year should be charged.

New Community Class/Membership Justification Needed When:

- Cost increases by more than $50
- Class duration changes
- New class is selected
- Vendor changes

Transportation Reminder

Parking and tolls are not reimbursable through transportation categories. If staff incurred those costs while working, they may be eligible under Staff Activity Fees.

Need Help?

Contact your assigned **FI Program Manager** for assistance.

For forms, transportation logs, policies, training videos, and additional resources, visit:

CFS Self-Directed Services Family Resources https://www.cfsny.org/self-directed-services/#families