

Introduction to Goods and Services

“SDS gives some of our students the opportunity to partake in dance classes who would not otherwise be able to participate due to personal financial limitations. One of our new parents was so grateful to find a way for her 8-year-old daughter with Down syndrome to finally be able to take a dance class and this is possible through the SDS funds.”

— **Aspiring Attitudes Inc.** (Dance Studio in Oklahoma City)
Providing services to those utilizing SDS since August 2022

Examples of Approved Goods and Services

All Goods and Services require advance approval. What was approved for a previous recipient may not be approved for a different recipient, so the EOR must work with their case manager to determine what Goods and Services are best for the recipient.

Goods	Services
Adaptive Bikes	Gym Membership
Flotation Devices	Dance Classes
Sensory Toys	Swimming Lessons
Sensory Swing/Specialized Swing Set	Bowling
Small Generator for Medical Equipment	Therapeutic Horseback Riding
	Cheerleading
	Music Lessons/Therapy
	Art Lessons/Therapy
	Camps (lasting 14 consecutive calendar days or less)

Adaptive equipment requests must go through traditional services. The Case Manager (CM) will submit these requests to the Resource Development Unit (RDU) team for review.

Examples of Goods and Services that are NOT Approved

Services provided through other funding sources, such as:

- SoonerCare
- Medicare
- Private Insurance
- Public School System
- Rehabilitation Services
- Natural Supports
- Goods and Services with costs that significantly exceed community norms

Services that are considered recreational, medical, or personal are not approved:

Recreational	Medical	Personal
Tickets and related costs to attend recreational events	Insurance, co-payments for medical services	Room and board including: <ul style="list-style-type: none"> • Deposits • Rent • Mortgage payments
Vacation expenses	Over-the-counter medicines	Personal items and services that are not directly related to the recipient's disability
Spa treatments	Homeopathic services	
Personal trainer	Items or treatments that aren't approved by the FDA or experimental goods and services	

Disclaimer: This document is a condensed version of the EOR training and DDS policy. Completing the EOR training is a requirement for utilizing Self-Directed Services.

What Am I Responsible For?

EOR: Manages the vendor approval process and ensures the vendor is paid in a timely manner.

Finds the vendor the recipient would like to use.

- Explains to the vendor what to expect with the process.
- Ensures the vendor knows payment will not be issued until after services are rendered.

Obtains a **Letter of Recommendation** from a licensed professional that states how the Good or Service is beneficial to the recipient's disability needs.

Verifies with Acumen that their chosen vendor is already approved in their system.

- If the vendor is not already approved in Acumen's system, the EOR must get a Form W-9 from the vendor.

Asks the vendor about the cost of services.

- The EOR will need to gather a brochure or other document that has the cost of service in a written format.

After services are rendered, the EOR fills out the "Request for Vendor Payment" form with the vendor.

- Sends the "Request for Vendor Payment" form to Acumen. (The dollar amount on this request must match exactly to the amount authorized by Oklahoma Human Services. If this request does not match the authorization exactly, Acumen will not be able to pay the request.)

Receives an invoice from the vendor and sends it to Acumen.

Oklahoma Health Care Authority policy will not fund any request for payments that go beyond 6 months of the service being rendered. To meet this requirement, both the "Request for Vendor Payment" form and the invoice must be submitted to Acumen within 5 months of the service being rendered. If they are not submitted promptly, the EOR will be responsible for paying the vendor.

What Am I NOT Responsible For?

Task	Who is Responsible
Sends the EOR a blank copy of the "Request for Vendor Payment" form.	Acumen Fiscal Agent
Submits the necessary authorizations (PB#) to Acumen (prior to the "Request for Vendor Payment" and invoice being sent to Acumen)	Your Case Manager
Works with the EOR to budget the vendor into the recipient's yearly Plan of Care (POC).	Your Case Manager
If necessary, sends a W-9 to the he SDS team once vendor onboarding is complete.	The Vendor
Notifies the EOR of the cost of services.	The Vendor
Provides services to the recipient.	The Vendor
Works with the EOR to fill out the "Request for Vendor Payment" form. If the EOR has questions about how to complete the form.	Acumen Fiscal Agent
Sends an Invoice to the EOR.	The Vendor
Processes the vendor's W-9 within two business days of receiving the form.	Acumen Fiscal Agent
Process the authorizations (PB#) that are received from the case manager.	Acumen Fiscal Agent
Processes the "Request for Vendor Payment" form within two business days of receiving the form.	Acumen Fiscal Agent
Notifies the EOR of any corrections required in all submitted forms.	Acumen Fiscal Agent
Once the vendor is enrolled successfully in the program, Acumen will notify the EOR and let the EOR know that a "Good to Go" packet will be mailed or emailed. Acumen will not be able to pay your vendor with program funds until the "Good to Go" is issued.	Acumen Fiscal Agent

Did You Know?

If you are only interested in Goods and Services and do not want to hire a Self-Directed Habilitation Training Specialist (SD-HTS), you can utilize a vendor-only process! This process cuts down on the necessary paperwork and the enrollment time! Talk to your Case Manager for more information.

If you have any questions, please email the SDS team at DDS.SDS@okdhs.org

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