

# Contract to Direct Bill and Contract to Direct Invoice Process

To streamline communications and reduce the frequency of class, membership, and service confirmation emails and calls, we've updated the Contract to Direct Bill and Contract to Direct Invoice process. Below is an outline of the updated procedure:

**Service or Item Request:** When a participant expresses interest in signing up for a class, membership, or service, the participant or their COS representative will contact the Self-Direction Coordinator (SDC) and complete either the IDGS Service Request Form or Budget Line Justification Form (for item/service purchases). The form should indicate whether direct invoicing with the vendor is preferred.

**Approval Process:** The SDC will submit the request to the Approvals Committee for review.

**Approval Notification:** If the vendor is approved, the participant/COS representative will be notified, and they may proceed with purchasing the service/item. Please wait for approval before purchasing to ensure reimbursement through the Self-Direction Budget. In addition to having the appropriate forms completed and approved, the Life Plan will need to be updated by the Care Manager to justify the specific expense or line item.

**Direct Billing Setup:**

- For Approved Epay Vendors: The SDC will send the Contract to Direct Bill (participant contract) to the COS for completion and return.
- For Non-Epay Vendors: If direct billing is desired, the SDC will send both the Contract to Direct Bill (participant contract) and the Contract to Direct Invoice (vendor contract). The participant/COS representative should complete the Direct Bill contract and have the vendor complete the Direct Invoice contract. Both contracts must be returned to the SDC.

**Final Documentation:** The SDC will send the completed contracts to the Approvals Committee to document the participant's choice for direct billing with the vendor.

**No Monthly Follow-ups:** Once the participant's choice is recorded in Harmonics, the SDC will no longer need to request monthly attendance or service usage confirmation from the participant/COS representative. However, it remains essential for the participant/COS representative to review the Monthly Budget Summary to ensure vendor invoicing aligns with the participant's usage.

- If there is any discrepancy in vendor invoicing, it is the responsibility of the participant, their Broker (if applicable), and the COS representative to alert the SDC.

We believe these updates will reduce administrative burdens and allow participants/COS representatives to focus on effectively self-directing services.

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