AIM Reimbursable Services Information

Why AIM offers Reimbursable Services:

Reimbursable Services is not required; AIM offers this optional service for circle of support teams to ensure requested opportunities are eligible for reimbursement under the Self-Direction budget

Who is the Reimbursable Services Team:

- Specialized members including both programmatic and fiscal admin to support the self-directing person or representative with planning of out-of-pocket expenses throughout the self-direction budget year
- Circle of support teams will work with the Reimbursable Services Team for full review of the requested opportunity throughout the pre-approval process

What does the Reimbursable Services Team do:

- Review of each requested opportunity on a case-by-case basis
- Communicate with the circle of support team on determinations of requested opportunities, education on missing criteria, or additional reimbursable services support as needed
- Routine review of opportunities as Self-Direction approved reimbursable services to ensure opportunities remain eligible for the self-directing person and per NYS OPWDD Self-Direction Guidance
- Works with New York State OPWDD and external vendors as needed

What does the Pre-Approval Process do:

- Identify Justification in Supporting Documents, based on the self-directing person's individualized habilitative needs:
  - Life Plan
  - Staff Action Plan (if applicable)
  - Confirmation of Open Budget Categories *(important AIM reimbursement information noted below)
- Review of reimbursement criteria outlined in AIM policies, tools, and resources
- Review of programmatic criteria outlined in NYS OPWDD Self-Direction Guidance
- Re-review determinations of ineligibility with new/updated/additional information or as additional reimbursable services support is needed

Where to send requested opportunities for Pre-Approval:

- To your AIM Self-Direction Team (Self-Direction Coordinator or Self-Direction AP Specialist)
  - Your team will assist with gathering all pre-approval information for a full review
- Directly to Reimbursable Services Team at reimbursableservices@aimservicesinc.org

IMPORTANT AIM REIMBURSEMENT INFORMATION

- Budget category must be open, and budget effective date must be approved by OPWDD prior to purchase date of the requested opportunity
  - Example: Open Budget Line-IDGS Community Class, Budget Approved-12/1/2025, Opportunity Purchased 12/5/2025
- Circle of Support and SD teams work in partnership to update supporting documents such as the Life Plan, Staff Action Plan (if applicable), and self-direction budget to align with the self-directing person's individualized needs
- AIM cannot approve reimbursement until programmatic and reimbursement criteria is met; once met invoices will be processed based off AIM's Reimbursement Policy

R. Dec-25