Consumer Directed Services Glossary & Acronym List

Adult--A person who is 18 years of age or older.

Actively Involved--Involvement with an individual that the individual's service planning team deems to be of a quality nature based on the following:
   (A) observed interactions of the person with the individual;
   (B) a history of advocating for the best interests of the individual;
   (C) knowledge and sensitivity to the individual's preferences, values, and beliefs;
   (D) ability to communicate with the individual; and
   (E) availability to the individual for assistance or support when needed.

Agency Option--A service delivery option in which an individual chooses to have all of their program services delivered by a program provider who contracts with DADS.

Allowable Cost--A billable service or item that is within the rate and spending limits of the rate established by the Health and Human Services Commission and that meets the requirements of an individual's program.

Applicant--Depending on the context, an applicant is:
   (A) a person applying for employment with an employer;
   (B) a person or legal entity applying for a contract with an employer to deliver services to an individual; or
   (C) a person applying for services through a DADS program.

Budget--A written projection of expenditures for each program service delivered through the CDS option.

Budgeted Unit Rate--The unit rate calculated for employee compensation (wages and benefits) in the budgeting process for services delivered through the CDS option. The rate is calculated after employer support services have been budgeted.

CARE CDS Service Codes--In the CARE system, all services being self-directed have acronyms that end in “v”. For example, in HCS with Supported Home Living (SHL), this service will appear as “SHLV.”

CARE Service Code for Financial Management Services-- 63V

Case Manager (CM)--Term commonly used in the HCS program to describe the person responsible for coordinating the development of the Individual Plan of Care and the Individual Service Plan, and on-going service coordination and monitoring of the provision of services included in an individual’s plan of care and service plan. This service is provided to each waiver service recipient and consists of advocacy and assessment tasks. Case Managers initiate and oversee the process of assessment and reassessment of the individual’s level of care and the review of plans of care as needed, but not less than annually. Case Managers assist individuals who receive waiver services in gaining access to needed waiver and other State plan services, as well as needed medical, social, educational and other services, regardless of the funding source for the services to which access is gained.

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Consumer Directed Services (CDS) Option—A service delivery option allows individuals or their legally authorized representatives to be the employer of their direct service providers by recruiting, hiring, training, supervising and terminating their service providers. Services that can be self-directed vary depending on the DADS program.

Consumer Directed Services Agency (CDSA)—An agency that contracts with DADS to provide financial management services to individuals who choose to use the consumer directed services option.

Contractor—A person, such as a licensed or certified therapist, a licensed or registered nurse, or other professional, who has a service agreement with an employer to perform one or more program services as an independent contractor, rather than an employee of the employer or of an entity. A contractor may be a sole proprietor.

Designated Representative (DR)—An adult who is chosen by the employer (individual or LAR) to assist or to perform employer responsibilities in the CDS option. This individual must be willing to perform these duties on a volunteer basis, must be age 18 years or older, must pass a criminal background check and must not be listed on either the Employee Misconduct Registry or the Nurse Aid Registry.

Employer—in the CDS option the employer must be either the individual receiving services (who is at least 18 years of age and does not have a legal guardian), a parent, or legal representative of a minor-aged individual, or the legal guardian, regardless of the age of the individual receiving services.

Employee—a person employed by an employer through a service agreement to deliver program services and is paid an hourly wage for those services.

Employer-agent—The Internal Revenue Service (IRS) designation of a CDSA as the entity responsible for specific activities and responsibilities required by the IRS on behalf of an employer in the CDS option.

Entity—an organization that has a legal identity such as a corporation, limited partnership, limited liability company, professional association, or cooperative.

Employer Support Services—Services and items the employer needs to perform employer and employment responsibilities, such as office equipment and supplies, recruitment, and payment of Hepatitis B vaccinations for employees and support consultation.

Financial Management Services (FMS)—A service provided to the employer (individual or LAR) by a CDSA. This service consists of registration as the individual’s employer-agent, assistance as necessary with the individual’s service budget, approval of the service budget, performance of criminal background and registry checks upon request, verification of direct service provider credentials, processing direct service provider timesheets, computing and paying all federal and state taxes, distributing payroll, processing invoices and receipts for payment,
maintenance of records for all expenses and reimbursements, monitoring of budgets, preparation of at least quarterly reports regarding the CDS budget for the employer and CM or SC.

**Frequently Asked Questions (FAQ)**-- A document that details common questions posed regarding a subject and includes answers to those questions.

**Individual Plan of Care (IPC)**--The service budget for individuals in the HCS and TxHmL programs.

**Individual Service Plan (ISP)**--The service plan for individuals in the HCS program. A document developed in accordance with rules governing an individual's program that identifies the program services to be provided to the individual, the number of units of each service to be provided, and the projected cost of each service.

**Individual**--A person enrolled in a program.

**Legally Authorized Representative (LAR)**--A person authorized or required by law to act on behalf of an individual with regard to a matter described in this chapter, including a parent, guardian, managing conservator of a minor, or the guardian of an adult.

**Minor**--A person who is 17 years of age or younger.

**Non-program resource**--A resource other than an individual's program that provides one or more services or items.

**Parent**--A natural, legal, foster, or adoptive parent of a minor.

**Person-Directed Plan (PDP)**--The service plan for individuals in the TxHmL program. A document developed in accordance with rules governing an individual's program that identifies the program services to be provided to the individual, the number of units of each service to be provided, and the projected cost of each service.

**Program**--A community services program administered by DADS.

**Program Provider (PRGP)**--In the CDS option, this term refers to the individual’s comprehensive program provider agency.

**Service Agreement**--A written agreement or acknowledgment between two parties that defines the relationship and lists respective roles and responsibilities.

**Service Area**--A geographic area served by a program or specified in a contract with DADS.

**Service Back-up Plan**--A documented plan to ensure that critical program services delivered through the CDS option are provided to an individual when normal service delivery is interrupted or there is an emergency.
Service Coordinator--Term commonly used in the TxHmL program to describe the person responsible for coordinating the development and implementation of the Individual Plan of Care and the Person-Directed Plan, and on-going service coordination and monitoring of the provision of services included in an individual’s plan of care and service plan. This service is provided to each waiver service recipient and consists of advocacy and assessment tasks. Service Coordinators initiate and oversee the process of assessment and reassessment of the individual’s level of care and the review of plans of care as needed, but not less than annually. Service Coordinators assist individuals to enroll in waiver services. For individuals who receive waiver services, service coordinators assist individuals in gaining access to needed waiver and other State plan services, as well as needed medical, social, educational and other services, regardless of the funding source for the services to which access is gained.

Service Delivery Option (SDO)--The manner in which individuals choose to receive their program services. In HCS, an individual can choose to self-direct supported home living and respite while having the remainder of their services provided by their program provider. An individual may also choose to have all of their services delivered by their program provider with the agency option. In TxHmL, an individual may choose to use CDS with ALL of their services. An individual may also choose to have a program provider agency provide all of their services, or may choose to self-direct some services while having a program provider deliver others.

Service Planning Team--A group of people determined based on the requirements of an individual's program. Some DADS programs refer to the service planning team as an interdisciplinary team.

Service Responsibility Option (SRO)--Currently not available in HCS or TxHmL. This is a service delivery option available in other DADS programs.

Service Provider--An employee, contractor, or vendor.

Support Advisor--A person who provides support consultation to an employer, or a DR, or an individual receiving services through the CDS option.

Support Consultation--An optional service that is provided by a support advisor and provides a level of assistance and training beyond that provided by the CDSA through FMS. Support consultation helps an employer to meet the required employer responsibilities of the CDS option and to successfully deliver program services.

Vendor--A person selected by an employer or DR to deliver services, goods, or items, other than a direct service to an individual. Examples of vendors include a building contractor, electrician, durable medical equipment provider, pharmacy, or a medical supply company.

Working Day--Any day except Saturday, Sunday, a state holiday, or a federal holiday.