

Flower City Down Syndrome Network

Reimbursement Program Policies

Before reading these Reimbursement Program Policies, please refer to the “Terms and Conditions of FCDSN Membership”

General Policies

Definitions:

Qualifying Memberships: Family and Individual Memberships that include a person with Down syndrome with a residence in the Greater Rochester Area and that have paid their dues (or received a waiver) prior to the end of the first quarter of the year.

Qualifying Members: Individuals with Down syndrome who are part of a Family or Individual membership, who reside in the Greater Rochester Area and have paid their dues (or received a waiver) prior to the end of the first quarter of the year.

Maximum Benefit: The maximum amount that an existing Qualifying Membership or a Qualifying Member can receive per calendar year or the maximum amount that a new Qualifying Membership or a Qualifying Member can receive per 15-month period, through each of the reimbursement programs, subject to any limitations included herein.

Greater Rochester Area: Monroe County, New York, and contiguous counties.

Qualifying Memberships and Members:

The Conferences (National Down Syndrome Congress and Other) and Media reimbursement programs are designed to benefit an entire family. For these programs, Qualifying Memberships may seek the Maximum Benefit one time, per membership, per calendar year. The Services and Tuition/Scholarships reimbursement programs are designed to benefit individuals with Down syndrome. For these programs, Qualified Members may seek the Maximum Benefit one time per calendar year. Reimbursement requests for any one expense may be made through only one membership, regardless of whether it is an individual or family membership.

The goal behind separating Qualifying Memberships from Qualifying Members is to avoid “double dipping” when an individual is associated with multiple memberships, while also ensuring that families can fully access programs for each Qualifying Member in their family.

Example: The Smith family has four family members, one of which is 20-year-old John, who has Down syndrome. The Smith family has a Family Membership to the FCDSN and John also has an Individual Membership. John takes karate lessons several times per week, which cost about \$250 per year. Within the Smith family membership, John is the only Qualified Member for the Services Reimbursement Program. John may request reimbursement for the Maximum Benefit (\$200) through John's individual membership or through the Smith's family membership, but not both.

The Jones family has four family members also. Both of the minor children, Jane and Jeff, have Down syndrome. The Jones family has a family membership to the FCDSN. Both Jane and Jeff take acting lessons, which cost about \$500 per year each. Within the Jones family membership, both Jane and Jeff are Qualified Members for the Services Reimbursement Program. The family can request reimbursement for the Maximum Benefit for both Jane and Jeff, for a total of \$400.

Frequency:

Existing Qualifying Members and Memberships can receive one Maximum Benefit from each reimbursement program once per calendar year. They may receive the Maximum Benefit through one or multiple applications for reimbursement.

New Qualifying Members and Memberships that pay FCDSN dues during the fourth quarter of a year can carry their membership over into the following calendar year without having to pay additional membership dues. In such cases, the new Qualifying Members and Memberships can receive one Maximum Benefit from each reimbursement program once during that 15-month period. The new Qualifying Membership or Qualifying Member may participate in the reimbursement programs immediately upon paying membership dues.

Example: If a new member pays dues in November of 2010, their membership becomes effective immediately and they may participate in the reimbursement programs. However, if the new member participates in the reimbursement programs during 2010, the maximum benefit for which they are eligible in 2011 is reduced by the amount paid out in 2010.

Applying for Reimbursement:

Applications for reimbursement can be found at www.fcdsn.com.

Applications for any given calendar year must be received within 30 days of incurring the expense or within 30 days of the conclusion of the event(s) for which reimbursement is sought, whichever is later.

For a Qualified Member or Qualified Membership to be eligible for reimbursement, they must have paid their dues by January 31st. Qualifying Members and Memberships must also submit their expenses for reimbursement within 30 days. These two rules together mean that if a Qualifying Member or Membership wishes to submit an application for reimbursement prior to

having paid their dues, they MUST submit payment of their dues with their application for reimbursement.

Example: *The Morgan's have a Family Membership and their membership dues are not due until March 31st. On January 15th, they purchased a book about gross motor development and they would like to apply for reimbursement under the Media Reimbursement Program. They must submit their application for reimbursement by February 14th. Even though their dues are not normally payable until March 31st, the Morgan's must pay their dues by February 15th if they want to apply for reimbursement of this expense.*

Applications for reimbursement are reviewed monthly. All applications received in any given month will be reviewed the first week of the following month. For example, all applications received by May 31st will be reviewed the first week of June.

Reimbursements for any one expense can only be made through one membership and through one reimbursement program. Therefore, original receipts are required. Receipts must contain the name, address and phone number of the vendor. Tickets stubs, class descriptions, and course price listing will not be accepted as receipts. Applications must be completely filled out and must be signed.

All applications will be approved or denied by the Reimbursement Committee. In the event that the Reimbursement Committee cannot arrive at a unanimous decision, the application will be submitted for review at the next regularly scheduled Board meeting. Applications presented to the Board must be approved by a majority vote in order to receive reimbursement.

After a decision is made by the Reimbursement Committee or the Board, as applicable, reimbursement checks will be remitted to the applicant within 30 days from the time that the Reimbursement Committee notifies the Treasurer of its decision.

Approval and Denial:

Applications will be denied for the following reasons:

- The applicant membership under which reimbursement is sought is a non-qualifying membership.
- The expense for which reimbursement is sought is a non-qualifying expense. In determining whether an expense is qualified, the Reimbursement Committee will consider the policy intent for each Reimbursement Program.
- The applicant membership has fully utilized its maximum annual benefit from the Reimbursement Program through which reimbursement is being sought.
- Incomplete applications and applications without original receipts will be rejected and returned to the applicant for completion within 14 days. Once completed, the applicant may re-submit the application; however, the date of the application will be changed to reflect the date that the completed application is received. Applications will be deemed

incomplete if the applicant fails to provide the additional information required when seeking reimbursement through either of the conference reimbursement programs.

- Other good cause, including, but not limited to lack of funds and failure to comply by the terms of agreement for any prior reimbursement.

In the event that an application is denied, the applicant will receive a written explanation as to why the application was denied and will receive their original receipts back.

Specific Reimbursement Programs

Reimbursement requests for any one expense may not be made through multiple programs; however some special programs may allow qualifying members to apply through the special program and another reimbursement programs.

National Down Syndrome Congress (NDSC) Annual Convention

Policy Intent: To increase the collective knowledge base of the members of the FCSDN regarding current issues relevant to people affected by Down syndrome and to create meaningful connections with others throughout the country who are also affected by Down syndrome.

Maximum Benefit: The Maximum Benefit is dependent on the current FCSDN budget and the number of applicants, but in no circumstances is to exceed \$1,500 per Qualifying Membership. The amount budgeted for the both the NDSC Annual Convention and Other Conferences reimbursement programs shall not exceed 10% of the FCSDN's annual budget. Unspent funds will not carry over into the next year.

Qualifying Memberships: As defined above.

Qualifying Expenses: Registration fees and travel costs are eligible for reimbursement. Mileage reimbursement shall not exceed the Standard Mileage Rate established by the U.S. Internal Revenue Service and in effect at the time of the conference. Lodging and food expenses shall be reimbursed at their actual cost or at the per diem rates established by the U.S. General Services Administration and in effect at the time of the Convention, **whichever is lesser**.

Current per diem rates can be found at: <http://www.gsa.gov/portal/category/21287>

Example. The NDSC Annual Convention is in Tucson, Arizona in January. The federal per diem rates for this location and this time are \$90 for lodging and \$56 for meals and incidentals. Joan and John Miller have a Family Membership and wish to attend the Convention. They leave for Tucson on Sunday morning at 8:00 am and they return home on Tuesday at 8:00 pm. They are staying in a hotel that costs \$100 per night. The Millers are eligible for \$90 reimbursement per night. If the Millers found a hotel that cost \$80 per night, they would be eligible for a reimbursement of \$90 per night. Jack Miller, their son with Down syndrome, has an Individual Membership and also plans on attending the Convention. Jack's meals and incidentals throughout the three days cost him \$150. The per diem rate is \$168 (\$56 x 3), so Jack is eligible

for \$150 in reimbursement. If Jack's meals and incidentals cost him \$200 throughout the three-day period, he would only receive \$168 in reimbursement.

Other Requirements: Memberships that receive reimbursements through this program will be required to submit for publication on the FCDSN website a 200-250 word article to share what they learned at the conference. The article is to be submitted with the application for reimbursement and failure to fulfill this requirement will render an application incomplete.

An original receipt is required for reimbursement of registration fees and travel costs, excluding mileage. A FCDSN Travel Reimbursement Form is required for all other costs.

Applicants are required to give the FCDSN Board of Directors a notice of intent to apply for reimbursement for the NDSC Annual Convention no later than 45 days prior to the start of the conference.

Other Conferences

Policy Intent: To increase the collective knowledge base of the members of the FCDSN regarding current issues relevant to people affected by Down syndrome and to create meaningful connections with others throughout the region and the country who are also affected by Down syndrome.

Memberships that receive reimbursements through this program will be required to submit for publication on the FCDSN website a 100-150 word article to share what they learned at the conference. Failure to fulfill this requirement will render an application incomplete, as described above.

Maximum Benefit: The Maximum Benefit is dependent on the current FCDSN budget and the number of applicants, but in no circumstances is to exceed \$50 per Qualifying Membership for local and regional conference and \$250 per Qualifying Membership for all other conferences. The amount budgeted for the both the NDSC Annual Convention and Other Conferences reimbursement programs shall not exceed 10% of the FCDSN's annual budget. Unspent funds will not carry over into the next year.

Qualifying Memberships: As defined above.

Qualifying Expenses:

Registration fees and travel costs are eligible for reimbursement. Mileage reimbursement shall not exceed the Standard Mileage Rate established by the U.S. Internal Revenue Service and in effect at the time of the conference. Lodging and food expenses are eligible for reimbursement at a rate not to exceed the per diem rates established by the U.S. General Services Administration and in effect at the time of the conference. Current per diem rates can be found at: <http://www.gsa.gov/portal/category/21287>

An original receipt is required for reimbursement of registration fees and travel costs, excluding mileage. A FCDSN Travel Reimbursement Form is required for all other costs.

Please note that reimbursements for the NDSC Annual Convention are processed through a separate reimbursement program.

Media

Policy Intent: To enable families that include a person with Down syndrome to build a personal library stocked with resources related to Down syndrome that they may refer to on a regular basis.

Maximum Benefit: The Maximum Benefit is dependent on the current FCDSN budget and the number of applicants, but in no circumstances is to exceed \$50 per Qualifying Membership.

Qualifying Memberships: As defined above.

Qualifying Expenses: Both written and audiovisual materials are eligible. Media items that qualify for reimbursement include, but is not limited to:

- Educational materials that provide information related to Down syndrome and disabilities
- Spiritual and inspirational materials that provide uplifting stories or testimonials about the experiences of individuals with disabilities
- Practical strategy materials that focus on skills acquisition
- Children's book that focus on disabilities or that feature characters with disabilities

Services and Relevant Items

Policy Intent: To enhance the social or recreational quality of life for individuals with Down syndrome.

Maximum Benefit: The Maximum Benefit is dependent on the current FCDSN budget and the number of applicants, but in no circumstances is to exceed \$300 per Qualifying Member.

Qualifying Members: As defined above

Qualifying Expenses:

Enrollment fees associated with enrollment in a structured activity, service, or class provided by a third party are qualifying expenses. Examples include fees associated with:

- Dance lessons
- Karate classes
- Cooking classes
- Swim lessons
- Scouting or summer camp fees

- One-on-one assistance required for maximum participation in a structured activity, service, or class provided by a third party

The cost of items required for participation in a structured activity, service, or class provided by a third party are qualifying expenses. Items are reimbursable only to the extent that they are required for participation in structured activities, services, or classes. All *adaptive items* that enable an individual with Down syndrome to participate in structured activities, services, or classes are qualifying expenses. Items that have *adaptive uses* are qualifying expenses only to the extent that they are adapted. Items that have *no adaptive quality at all* are qualifying expenses only if they are required for participation in an activity, service, or class that is otherwise eligible for reimbursement under this program. To the extent that items are reimbursable, it is irrelevant whether the items are purchased or rented.

Examples of non-qualifying expenses are those related to non-structured activities, such as:

- General memberships
- Admission fees or event tickets
- Medical treatments, devices, and therapies, including foods or liquids that are ingested, medications, vitamins, nutritional supplements, therapy programs or tools, co-pays, and items or equipment that can be covered in part or in full by medical insurance, such as eyeglasses, hearing aids, braces, or wheelchairs.

Examples: Sara is a 14-year-old dancer who has Down syndrome. She takes lessons every week and performs in four recitals a year. Sara is part of her family's FCDSN membership and is a Qualifying Member for the Items Reimbursement Program. Over the course of a year, her family pays \$150 in fees for dance lessons and \$75 for costumes for recitals. Sara's family may apply for up to \$300 in reimbursement: \$150 for dancing fees and \$150 for costumes that are necessary for participation in the dance class recitals.

Sam is a 12-year-old video game enthusiast who has Down syndrome. Sam is part of his family's FCDSN membership and is a Qualifying Member for the Items Reimbursement Program. Sam wants to buy the newest Play Station and knows that his friends will all come over to play on the system. The cost of the Play Station is not a qualifying expense because it is not required for Sam to participate in a structured activity, service, or class that is provided by a third party.

Seth is a 7-year-old with Down syndrome who comes from a family that loves to ski. Seth is part of his family's FCDSN membership and is a Qualifying Member for the Items Reimbursement Program. Seth has three older sisters who were taught to ski by their parents. If Seth's parents take him skiing with the family and teach him how to ski, the ski lift fee and the cost of skis are not qualifying expenses. If, however, Seth's parents choose to enroll him in a structured skiing class provided by a third party, those expenses would be reimbursable, up to the Maximum Benefit amount.

Tuition/Scholarships

Policy Intent: To increase access to educational opportunities to individuals with Down syndrome and their immediate families.

Maximum Benefit: The Maximum Benefit is dependent on the current FCDSN budget and the number of applicants, but in no circumstances is to exceed \$250 per Qualifying Membership or Qualifying Member. Qualifying Memberships and Qualifying Members can apply in successive years, but preference will be given to new applicants.

Qualifying Members and Qualifying Memberships: As defined above, provided that the applicant for reimbursement is 18 years of age or older.

Qualifying Expenses: For Qualifying Members, reimbursement may be sought for life-enhancing classes and/or conferences throughout the year, regardless of specific subject matter or area of interest. For Qualifying Memberships, reimbursement may be sought for college level programs relations to special education or therapy services, provided that the applicant has maintained a minimum 3.0 GPA.