



Respite Voucher Program Operating Procedures

Effective Date: August 2025

Revised: April 2026

Purpose

This manual establishes standardized procedures for the administration of the Tennessee Caregiver Coalition (TCC) Respite Voucher Program. It outlines processes for application intake, eligibility determination, enrollment, voucher management, reimbursement, reporting, and recordkeeping to ensure compliance with grant requirements and organizational policies.

Program Overview

The Respite Voucher Program provides financial assistance to caregivers to access respite services. Eligible caregivers may receive up to \$600 per fiscal year to support temporary care for individuals living in their household.

The program is administered by the Voucher Program Coordinator, with support from the Helpline Coordinator and Assistant Director.

1.1 Application Access

Caregivers may apply to the program **April 1st- June 30th** by visiting our website:

- <https://tncaregiver.org/respite-voucher-program/>
- Caregivers must click the purple 'Enroll Now' button to get started.

- Caregivers will create an account on the Client Portal located on our website. A direct link to the Client portal can be found [here](#).

1.2 How Applicants Submit

Applications are only accepted via the Client Portal.

1.3 Program Eligibility Requirements

Applicants must:

- Be a resident of Tennessee
 - Provide care for someone living in their household
 - Submit proof of diagnosis dated within the past three (3) years
 - Submit direct deposit/ACH information for voucher payments
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2. Application Materials

Applications missing documentation will not be processed. The Respite Voucher Coordinator will reach out to caregivers via email if they submit an application without documentation.

2.1 Completed Application

- Submitted via the TCC portal, with demographic information on the caregiver and care recipient included.

2.2 Proof of Diagnosis

- Acceptable proof of diagnosis documents include, but are not limited to, the following:
 - a. Written diagnosis from a licensed physician
 - b. Hospital visit or discharge summary
 - c. Copy of Individualized Education Plan (IEP)

2.3 Payment Profile Using Bill.com

Caregivers receiving a reimbursement from the voucher program must create an account on [Bill.com](#) in order to receive payment.

3. Application Review Procedures

Applications will not be approved if it is determined the applicant does not meet the program eligibility criteria or does not submit the required verification documentation.

3.1 Application Receipt

The Respite Voucher Coordinator must:

- Review applications in Salesforce using the Application Dashboard
- Monitor submission and upload notifications
- Verify required documentation

Applications must be reviewed weekly.

3.2 Application Status Categories

Applications must be categorized as:

- Awaiting Documentation
 - Review Documentation
 - Review for Approval
 - Approved/Not Approved
 - Waitlisted
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3.4 Data Handling

If documents are emailed:

- Reply with instructions for submitting documents to the Client Portal
- Delete from local storage

If documents are mailed:

- Staff will place mailed documents in the Respite Voucher Coordinator's mailbox
- Respite Voucher Coordinator will scan documents to Salesforce

- Shred documents after uploading to Salesforce

4. Enrollment and Funding Assignment

Funding Source Determination

Applicants must be assigned to:

- **DDA (TCAD):** Default
 - **Mental Health (TDMHSAS):** Youth under 18 with qualifying diagnoses
 - **WEHF:** Age 60+ in eligible counties
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5. Approval and Notification Procedures

Staff must notify caregivers of approval and provide:

- Welcome email with portal login instructions
- Voucher submission guidance

If an applicant does not meet program eligibility requirements, does not provide the required verification, or otherwise submits an incomplete application, it will be considered denied.

6. Voucher Submission Procedures

6.1 Digital Voucher Submission

Caregivers must:

- Log into the portal with username and password.
- Select Vouchers
- Complete voucher form. Caregivers must include the date of respite, number of respite hours, and the email address of their respite provider.
- Sign the digital voucher electronically using DocUSign

- Ensure respite provider signature is complete using DocUSign

Digital vouchers are NOT considered complete and ready for payment until both the caregiver and respite provider have digitally signed the voucher using DocUSign.

6.2 Voucher Review

The Respite Voucher Coordinator must verify:

- Accuracy of digital voucher information
- Completion of signatures of the caregiver and respite provider
- Valid respite provider email address details

Incorrect vouchers must be deleted and resubmitted.

6.3 Manual Vouchers

Manual vouchers are no longer accepted. All vouchers must be submitted digitally using the Client Portal. Caregivers who are unable to submit applications electronically are encouraged to call the TCC office to make arrangements. In-person visits are available throughout the state from either TCC staff or Caregiver Ambassadors.

7. Reimbursement Processing

The primary caregiver named on the digital application is typically the reimbursement recipient unless an alternative has been otherwise approved, such as a spouse or an organization that will receive a direct payment.

7.1 General Processing

Voucher Reimbursements:

- Are paid out at the end of the following month from when fully submitted.
 - Vouchers are NOT submitted until all appropriate signatures have been received.
 - Are paid via ACH direct deposit.
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8. Portal Procedures

8.1 Portal Access Issues

Here are solutions to the two most common issues with the caregiver portal: non-active accounts and forgotten passwords. The Respite Voucher Coordinator must:

- Verify users are active by clicking 'View Portal User' on the Contact page. This button allows for visiting the Setup Menu, located on the back-end of the Salesforce profile.
 - Make sure the Active checkbox is checked.
 - To reset the client portal password for a caregiver, navigate to the Setup Menu by clicking on 'View Portal User' on the Contact page. At the top, click 'reset password'.
 - An automated email will be sent to the caregiver with instructions to reset their password.
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9. Reporting Procedures

9.1 Monthly Reporting

Reports on the Respite Voucher Program must be completed by the 15th of each month. The following reports are due each month:

- DDA Report
 - Mental Health Report
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9.2 Data Sources

All reporting data must be pulled from Salesforce reports and stored in designated folders on the TCC Shared Drive within Google Drive. Staff are responsible for following the File Naming & Organizing SOP as outlined [here](#).

10. Financial Tracking

Staff may review funding balances in Salesforce using:

- Total allocated
 - Amount spent
 - Remaining funds
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11. Recordkeeping

All program data must be:

- Stored in Salesforce, under the correct Contact profile
- Maintained for a period of 7 years for reporting and audit purposes
- Physical files are shredded after a period of 7 years