






Changing Financial Management Services Providers

Open Enrollment allows a Consumer-Directed Attendant Support (CDASS) employer to change Financial Management Services (FMS) providers. Changing FMS can only occur quarterly as listed below. **If the employer does not want to change FMS, no action is needed.** CDASS employers are encouraged to review the FMS Comparison Chart, visit the FMS website, and contact FMS customer service with questions before beginning the process to transfer.




Paperwork Due:	Start Date with new FMS:
March 1 st	March 16 th
June 1 st	June 16 th
Sept. 1 st	Sept. 16 th
Dec. 1 st	Dec. 16 th

Task	Responsible Party		
	 Client/AR	 Case Manager	 FMS Provider
CDASS employers can research a new FMS provider. Comparison information and FMS satisfaction survey results are on the Consumer Direct for Colorado website.	<input checked="" type="checkbox"/>		
CDASS employers should notify the Case Manager of which FMS provider they would like to transition to.	<input checked="" type="checkbox"/>		
Case Manager will make the referral to the new FMS.		<input checked="" type="checkbox"/>	
CDASS employers should contact their existing FMS to ensure no outstanding or incomplete timesheets need attention.	<input checked="" type="checkbox"/>		

Process Flow



Process Flow Cont.

Task	Responsible Party		
	 Client/AR	 Case Manager	 FMS Provider
Current and new FMS vendors will communicate to coordinate transition.			<input checked="" type="checkbox"/>
CDASS employers must complete and return required paperwork to the new FMS provider.	<input checked="" type="checkbox"/>		
The new FMS will process paperwork and complete required checks for employment.			<input checked="" type="checkbox"/>
The new FMS will notify Case Manager that enrollment/transfer is complete.			<input checked="" type="checkbox"/>
Case Manager will review current Prior Authorization Request (PAR) for accuracy and revise FMS fee if necessary.		<input checked="" type="checkbox"/>	
Case Manager will enter PAR into the new FMS provider portal.		<input checked="" type="checkbox"/>	
Services with new FMS can begin on designated transfer date.	<input checked="" type="checkbox"/>		
Case Manager will send discontinuation notice to previous FMS and call to ensure receipt.		<input checked="" type="checkbox"/>	

Process Complete!

For questions, contact Consumer Direct Colorado via phone (844)-381-4433 or via email at- infocdco@consumerdirectcare.com