

Financial management services agency quarterly reporting requirement

Quick reference guide

UnitedHealthcare Community Plan of Texas requires documentation when changes are needed to Individual Service Plans (ISPs). To help ensure members receive the right services and maintain alignment with the Consumer Directed Services (CDS) as part of **Texas Administrative Code, Title 40, Chapter 41**, financial management services agencies (FMSAs) must send a quarterly expenditure report to both the CDS employer and the managed care organization (MCO) service coordinator. This requirement applies to services delivered by the FMSA to the member or legally authorized representative (LAR), as described in **8214.2, FMSA Responsibilities**.

What to include in your reports

Reports must document and notify the MCO of issues or concerns, such as:

- Allegations of abuse, neglect, exploitation or fraud
- Concerns about the member's health or safety
- Non-delivery or extended breaks in services
- Noncompliance with CDS employer responsibilities
- Noncompliance with service back-up plans
- Over- or underutilization of services or funds allocated in the ISP for delivery of services to the member through the CDS option and in accordance with the requirements of the STAR+PLUS or STAR+PLUS HCBS program



Questions?

Connect with us through chat 24/7 in the **UnitedHealthcare Provider Portal**.

How to submit reports

- Reports may be created by the FMSA or provided by the MCO service coordinator to be filled in by the FMSA
- Submit completed reports to both the CDS employer and MCO service coordinator

Resources

You can find additional information on the **8200, Consumer Directed Services page of the Texas Health and Human Services page** under **8232 Service Planning Team responsibilities**.