



## Financial Management Services (FMS) Membership Benefits

### Feedback to Federal Agencies

Financial Management Services (FMS) experts at Applied Self-Direction regularly confer with federal agencies regarding key issues that impact FMS members and the FMS industry. We continue to work with the Internal Revenue Service (IRS), the Centers for Medicare and Medicaid Services (CMS), and the Department of Labor (DOL) with regard to tax issues, labor laws and regulations, federal Medicaid rules, and other regulatory matters that impact FMS Members. Drawing from member feedback, we seek to help members achieve and maintain compliance with complex IRS and DOL rules and regulations. We may also engage with other key federal agencies to examine important issues relating to the health of self-direction.

### Advocacy for Advancing & Expanding Self-Direction

We work with our members and other organizations to advocate for the advancement and expansion of self-direction, including providing tools to help our members advocate for self-direction interests in their states and programs.

### FMS Industry Best Practices & Opportunities

We collaborate with FMS members to identify best practices and new opportunities for the FMS industry. As industry leaders with strong track records of operational excellence, FMS members are best positioned to provide meaningful input on industry successes, challenges, and opportunities for expansion. We share best practices broadly with other key stakeholders in the field of self-direction, including participants and federal and state agencies, as a means to standardize industry practices and highlight the vast expertise of FMS Membership.

### Written Resources

We release written resources each membership year for FMS members on timely topics in the field of FMS. Topics may include promising practices, payroll practices, emerging technologies, operations management, tax and insurance updates, workforce management, and more. We seek member feedback to identify relevant topics throughout the year. We encourage all members to submit any relevant topics to be considered for written resource.

### Email Updates

We send regular email updates to keep members abreast of upcoming events, notable news in self-direction, and resources available through Applied Self-Direction. All interested individuals within a member organization are welcome to join our mailing list. If anyone within your organization would like to be added to, or removed from, the member email list, please contact [membership@appliedselfdirection.com](mailto:membership@appliedselfdirection.com).

## **Online Trainings**

Online trainings on self-direction are offered two times a year for FMS members. These trainings address a range of topics in self-direction from beginner to advanced. Depending on the topic and session, these webinars are useful for FMS staff who are new to self-direction or those with years of experience in the industry. The self-direction trainings are recorded and available to share within your organization.

## **Member Webinars**

Member webinars are held several times throughout the year to keep members informed of the latest developments and promising practices in the field of self-direction and FMS. Webinar topics are Member-driven, timely, and relevant. We encourage members to reach out with any topics of interest for future sessions. A recording of each webinar and related resources are made available on the member-only area of our website following each webinar.

## **Discussion Forums**

In response to issues that may affect self-direction, we may offer a discussion forum for FMS and State Program members in a comfortable setting that facilitates the exchange of information. During this open-structured call, members are encouraged to participate by sharing best practices, discussing industry issues, asking questions, and responding to others' questions.

## **Member-Only Website**

This password protected area of [www.appliedselfdirection.com](http://www.appliedselfdirection.com) features materials and resources with exclusive access for members. Here you will find news updates relevant to FMS providers and self-direction, information on upcoming member events, and an online library of member resources. The online library features self-direction tools and resources, recordings and supporting materials from webinars and trainings, written resources, presentations and materials distributed at national conferences, and other relevant resources. Members may submit helpful tools and resources to share with one another via the online library as well.

## **Expansion of the Marketplace**

FMS Membership is member-driven and aimed at focusing on areas of general interest in self-direction. We often share work derived from FMS membership with state and federal agencies and other governmental stakeholders. It is our goal to expand self-direction, thus boosting opportunities for the FMS provider marketplace.

## **Networking**

Through membership, FMS members are in regular contact with other FMS member organizations and State Program members. There are various opportunities to ask questions and learn from each other, including webinars, email exchanges, and in-person gatherings.

### **Membership Committees**

We offer new opportunities for FMS members to participate in membership committees, including the FMS Membership Steering Committee and special FMS and State Program member committees to focus on specific projects and key industry concerns.

### **Public Policy Priorities**

FMS members have the opportunity to discuss critical policy issues related to self-direction, to comment on relevant proposed regulation and rulemaking, and receive email alerts on emergent policy issues and announcements.

### **Online Directory**

FMS member representatives are listed in an online directory that can be viewed by states and other stakeholders interested in learning more about FMS at [www.appliedselfdirection.com](http://www.appliedselfdirection.com).

### **Conferences**

FMS member agencies are eligible for a special member-only discount on Applied Self-Direction conferences and workshops. Applied Self-Direction will continue to hold the NRCPS biennial Self-Direction Conference (formally the FMS Conference).

### **Member Inquiry**

In instances where members have program issues that require a quick follow-up, rather than in-depth technical assistance (TA), we will provide information, research, and tools as appropriate. We are only able to provide information that is in the public domain and will not provide TA on particular issues specific to a single FMS provider or program. Each FMS member organization can receive up to five hours of Member inquiries from Applied Self-Direction per membership year.

### **Discounted Technical Assistance (TA) for Individualized Projects**

Members have the option of receiving individual TA on special at discounted TA rates. Please contact [membership@appliedselfdirection.com](mailto:membership@appliedselfdirection.com) to learn about options for individualized TA.

### **New Benefits**

We strive to ensure that member benefits provide maximum value. We welcome member input for improving benefits. FMS members should submit ideas or requests for new benefits to [membership@appliedselfdirection.com](mailto:membership@appliedselfdirection.com).