

**DIRECTOR**  
Bertha H. Judge

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# Department of Social Services

## County of Prince George

**BOARD OF SOCIAL SERVICES**  
Jeffrey D. Stoke – County Administrator



Community Policy & Management Team (CPMT) Meeting Minutes  
9:00 AM – Wednesday, September 6, 2023

### **MEMBERS PRESENT:**

Diana Barnes, CSB D19/CPMT Chair  
Timothy Beard, PG County Court Services  
Donald Hunter, PG Board of Supervisors  
Bertha Judge, PG DSS Director  
Lori Robertson, PG County Finance  
Jean Hill-Atkins, Parent Representative

### **MEMBERS NOT PRESENT:**

Donald Edwards, Private Provider  
Jennifer McGuire, PG County Schools

### **NON-MEMBERS PRESENT:**

## **I. CALL TO ORDER AND ROLL CALL**

- D. Barnes called the meeting to order at 9:03 am

## **II. INTRODUCTIONS**

## **III. APPROVAL OF MINUTES**

- Minutes from the August 2, 2023, meeting
- Motion to approve 1<sup>st</sup> D. Hunter 2<sup>nd</sup> B. Judge

## **IV. ANNOUNCEMENTS**

- B. Judge discussed the Strategic Planning Follow-Up. She has found a company to provide an Official Strategic Plan. L. Robertson stated she would need to contact Michelle Jackson with Procurement to discuss this process further. The plan is to have a Zoom Introduction from Lori Strumpf with Strumft Associates at our October 4, 2023, meeting which has changed to the November 1, 2023, meeting.

## **V. OLD BUSINESS**

- The PG Annual Strategic Plan was reviewed and updated. All members need to sign the approved finalized copy.

## **VI. NEW BUSINESS**

- Discussed FAPT member changes- Christina Pope has replaced Jennifer McGuire as our PG School Representative.
- Discussed the Private Day Special Education Schools rate increases. Lori provided a spreadsheet to show the rate breakdown for each Private Day School and

expenditures that exceed the 2% cap for each vendor and student. We have a total of 19 students at 7 Private Day Schools.

- Discussed the updated MHI funding protocols to incorporate the new changes and language from DBHDS. D. Barnes explained in detail about the CSB D19 process.
- Discussed the new OCS Audit schedule and Prince George will have our next audit for Fiscal Year 2026
- Discussed current and previous fiscal year expenditures: All invoices have been paid for Fiscal Year 2023. Reviewed current fiscal year spreadsheet of current purchase orders.
- Reviewed statistical data: LEDRS Comparison Report of service placement for fiscal year 2023. Comparing the cost, length of stay and expenditure per child between four local surrounding localities of Surry, Hopewell, Petersburg, and Sussex.
- Reviewed statistical data: Reviewed Pool History Comparison Report between fiscal year 2020, 2021, 2022 and 2023.
- CSA Coordinator was contacted on 8/8/23 by Stacie Laflame from Rivermont. There was an oversight by PG Schools regarding a missing invoice for a student. The case was originally presented at FAPT on 6/13/23 by J. Dybuvarang but no ESY was requested at that time, but the student was enrolled. The 5 days for June in the amount of \$1,840.00 from the previous fiscal year need to be paid along with the 20 days in July in the amount of \$9,960.00. The progress report was received to pay the invoice on 8/9/23. The case was approved on the 8/10/23 FAPT. Due to the approaching deadline of fiscal year end and the mandated funding the invoice was processed on 8/15/23 prior to the CPMT approval. It was discussed that this error was made in good faith but would not happen again. All expenditures will be reviewed and approved by CPMT before being paid. Also going forward a hard deadline and rules will be established to ensure the School System will present expenditures before the end of the fiscal year.

## **VII. EXECUTIVE SESSION**

Motion to convene in Executive Session pursuant to 2.2-3711 (A) (4) and (15), and in accordance with the provisions of 2.2 – 5210 of the Code of Virginia for proceedings to consider the appropriate provision of services and funding for a particular child or family or both who have been referred to the family assessment and planning team and whose case is being reviewed by the community policy and management team.

- 1<sup>st</sup> D. Hunter 2<sup>nd</sup> B. Judge

## **VIII. MOTION TO RETURN TO OPEN SESSION**

- 1<sup>st</sup> T. Beard 2<sup>nd</sup> L. Robertson

#### **IX. CERTIFY COMPLIANCE BY ROLL CALL (10:19 am)**

Move that the members of the Prince George County CPMT certify that to the best of each member's knowledge, (1) only public business matters lawfully exempted from open meeting requirements, and (2) only such public business matters were identified in the motion by which the closed meeting was convened were heard, discussed, or considered in the closed meeting.

#### **X. MOTION FOR BILLING ERROR RESOLUTION**

- Acknowledgement of the approval of \$1,840.00 from the prior fiscal year in the current fiscal year.
- 1<sup>st</sup> T. Beard 2<sup>ND</sup> L. Robertson

#### **XI. MOTION FOR CASE APPROVAL**

- Motion to approve cases discussed in closed session.
- 6 cases reviewed & 5 cases requesting funding.
- Requested 2022-2023= \$1,840.00
- Requested 2023-2024= \$78,032.17
- 1<sup>st</sup> T. Beard 2<sup>nd</sup> B. Judge

#### **XII. ADJOURNMENT**

- Motion to adjourn being no further business to discuss. CPMT adjourned at 10:22 a.m.

#### **NEXT MEETING:**

CPMT will be Wednesday November 1, 2023, 9:00 a.m. at Prince George County Social Services Training Room.

Office of Children's Services  
Comparison Report - By Service Placement Type

Data Source: LEDRS

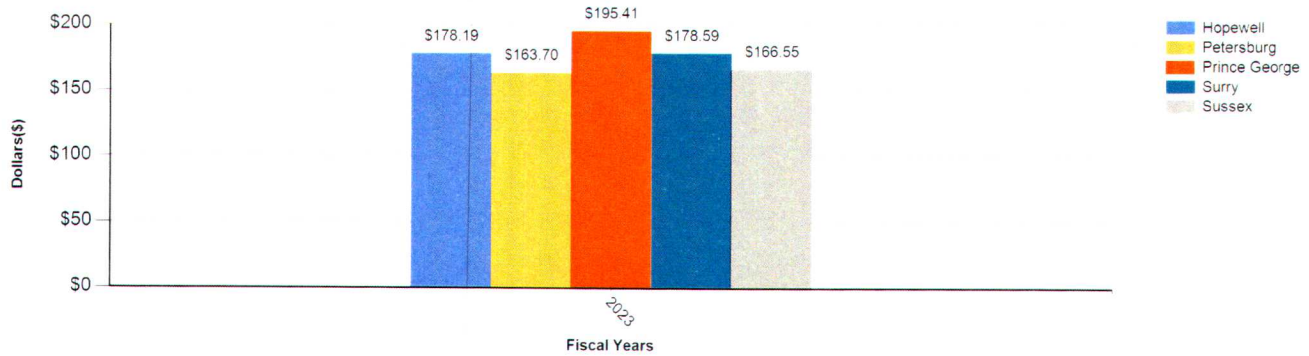
Fiscal Year 2023

Report Span Year to date - for Selected  
Fiscal Years

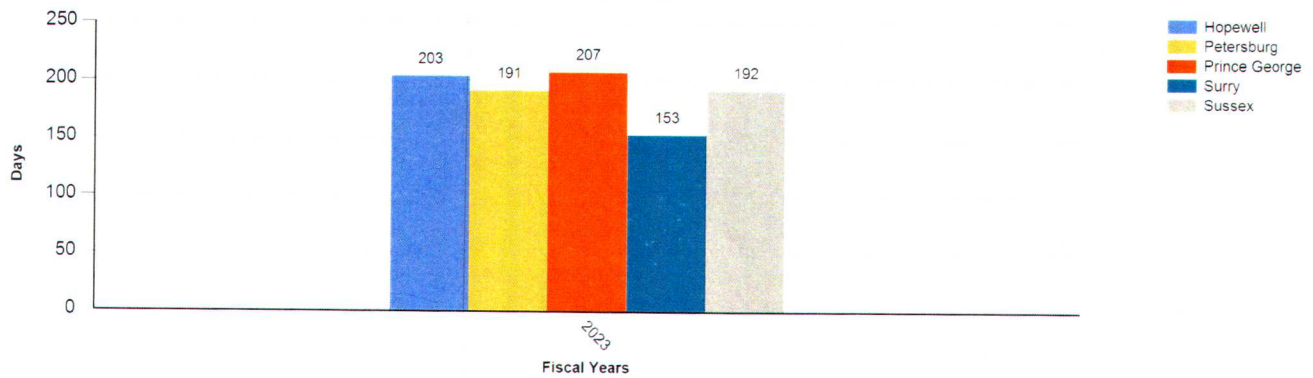
Selected Localities to Compare 149 - Prince George, 181 - Surry, 183 - Sussex, 670 - Hopewell, 730 - Petersburg

Selected Service Placement Type(s) All

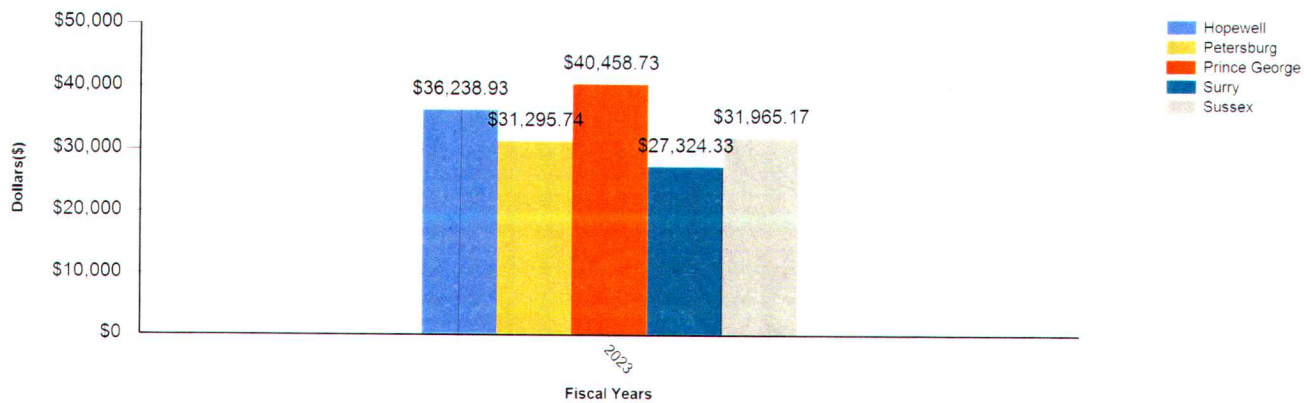
Average Per Diem Cost



Average Length of Stay



Average Net Expenditure per Child



# Pool History Comparison Report

Date Report Created: September 26, 2023

Locality: Prince George - 149

Report Fiscal Year: 2023

Report Comparison Years: 2022,2021,2020

Net Expenditures include all Report Preparer Approved pool reports (status 1 or greater) for each Fiscal Year as of September 26 of that Fiscal Year

Note: This report compares "Total" Net Expenditures of each Fiscal Year

Expenditure Description		Net Total Expenditure FY20	Net Total Expenditure FY21	Net Total Expenditure FY22	Net Total Expenditure FY23	Change	% Change
<b>Number of Pool Reports: RP-APPROVED (STATUS 1 or GREATER)</b>		14	14	14	15		
<b>1. Congregate care / Mandated and Non-Mandated Residential Services</b>		<b>a</b>	<b>b</b>	<b>c</b>	<b>d</b>	<b>e=d-c</b>	<b>f=(e/c)*100</b>
<b>1a.</b>	Foster Care - IV-E children in Licensed Residential Congregate Care; pool expenditures for costs not covered by IV-E (i.e., non room-and-board)	\$21,080.88	\$26,539.14	\$0.00	\$0.00	\$0.00	0.00%
<b>1b.</b>	Foster Care - all others in Licensed Residential Congregate Care	\$19,022.82	\$118,434.44	\$57,043.44	\$58,480.00	\$1,436.56	2.52%
<b>1c.</b>	Residential Congregate Care— CSA Parental Agreements ; DSS Noncustodial Agreements	\$85,229.32	\$75,145.46	\$49,713.00	\$5,960.25	-\$43,752.75	-88.01%
<b>1d.</b>	Non-Mandated Services/Residential/Congregate	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
<b>1e.</b>	Educational Services - Congregate Care	\$127,220.06	\$134,609.54	\$50,708.28	\$22,385.10	-\$28,323.18	-55.86%
<b>2. Other Mandated Services</b>							
<b>2a.</b>	Treatment Foster Care – IV-E	\$112,014.47	\$168,400.17	\$89,731.81	\$48,177.25	-\$41,554.56	-46.31%
<b>2a.1</b>	Treatment Foster Care	\$327,585.19	\$207,420.29	\$290,143.61	\$155,599.92	-\$134,543.69	-46.37%
<b>2a.2</b>	Treatment Foster Care – CSA Parental Agreements ; DSS Noncustodial Agreements	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
<b>2b.</b>	Specialized Foster Care – IV-E ; Community Based Services	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
<b>2b.1</b>	Specialized Foster Care	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
<b>2c.</b>	Family Foster Care – IV-E ; Community Based Services	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
<b>2d.</b>	Family Foster Care Maintenance only	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
<b>2e.</b>	Family Foster Care – Children receiving maintenance and basic activities payments; independent living stipend/arrangements	\$11,968.69	\$38,313.77	\$28,794.73	\$45,261.64	\$16,466.91	57.19%

2e.1	State Kinship Guardianship	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
2e.2	Federal Kinship Guardianship	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
2f.	Community - Based Services	\$45,388.27	\$23,828.46	\$23,291.41	\$10,123.78	-\$13,167.63	-56.53%
2f.1	Community Transition Services – Direct Family Services to Transition from Residential to Community	\$0.00	\$0.00	\$10,885.00	\$0.00	-\$10,885.00	-100.00%
2g.	Special Education Private Day Placement	\$1,240,898.30	\$1,413,164.41	\$1,387,801.94	\$1,700,810.51	\$313,008.57	22.55%
2h.	Wrap-Around Services for Students With Disabilities	\$11,721.68	\$9,962.50	\$1,917.75	\$5,984.00	\$4,066.25	212.03%
2i.	Psychiatric Hospitals/Crisis Stabilization Units	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
3.	Non-Mandated Services/Community-Based	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
4.	<b>GRAND TOTALS: (Sum of categories 1 through 3)</b>	<b>\$2,002,129.68</b>	<b>\$2,215,818.18</b>	<b>\$1,990,030.97</b>	<b>\$2,052,782.45</b>	<b>\$62,751.48</b>	<b>3.15%</b>



# COMMONWEALTH of VIRGINIA

Scott Reiner, M.S.  
Executive Director

OFFICE OF CHILDREN'S SERVICES  
*Administering the Children's Services Act*

## ADMINISTRATIVE MEMO #23-08

**To:** CPMT Chairs  
CSA Report Preparers  
CSA Coordinators  
CSA Fiscal Agents

**From:** Kristy Wharton, Chief Financial Officer

**Date:** July 14, 2023

**Subject:** FY2023 CSA Program Expenditure Year End  
FY2024 Base Pool Allocation Funds / Non-Mandated (protected) Funds  
FY2024 Wraparound Services for Students with Disabilities Funds (SPEDWrap)  
FY2024 Expenditure Reporting

### FY2023 Year-End Reimbursement Processing:

During the months of July, August, and September, LEDRS can accept expenditures incurred in multiple fiscal years. During the months of July and August, a locality can only submit one LEDRS file each month. In the month of September, a locality can submit up to three (3) LEDRS files.

In the months of July, August, and September, LEDRS separates the submitted data into FY2023 and FY2024 based on the purchase order's fiscal year, this will determine the program service year and the month of service. The expenditure reimbursement data from the locality comes in a single submission. Therefore, a locality should review both FY2023 and FY2024 data reimbursement requests before the Fiscal Agent approves the July, August, and September LEDRS submissions.

**All FY2023 reimbursement requests, for CSA services incurred during July 1, 2022 through June 30, 2023, must be approved by the local CSA fiscal agent in LEDRS by midnight September 30, 2023. Late submissions will not be accepted for reimbursement as addressed in SEC Policy 4.5.2.**

**Waivers to the September 30 reporting requirement must be submitted in writing and will be considered only if local governments demonstrate mitigating circumstances beyond their control.**

**CSA 2024 Base Pool Allocation and Non-Mandated (Protected) Funds:**

Attached to this memorandum is a table showing the FY2024 Base Pool Allocation by locality. The amount shown in the table will be the locality's Base Pool Allocation which will be reflected in the CSA Transaction History Report. The table also reflects an estimated local base match needed to receive the state's allocation. Please carefully review the amount allocated to your locality.

The Non-Mandated (Protected) funds are a subset of the locality's Base Pool Allocation. The Non-Mandated (Protected) funds are not additional funds. Your locality can use a portion of the Base Pool Allocation to provide non-mandated services. Attached to this memo is a PDF file, which reflects the FY2024 Non-Mandated (Protected) funds associated with a locality's Base Pool Allocation.

**FY2024 Wraparound Services for Students with Disabilities Funds:**

The FY2024 state appropriation allocation for "Wraparound Services for Students with Disabilities (SPEDWrap)" is \$2.2 million. This specific appropriation represents a continuation of the CSA "earmark" funding for this particular service category.

This limited appropriation places several restrictions on expenditures for this category. The state share of reimbursement of this category of expenditures may not exceed \$2.2 million statewide, nor can the appropriation be used for or transferred to other service categories. As with all state appropriations, any unexpended allocation cannot be carried forward to the next fiscal year. The Office of Children's Services (OCS) must allocate and manage these funds to ensure compliance with these restrictions.

The use of the funds for "Wraparound Services for Students with Disabilities" allows localities to provide services to youth when their identified educational disabilities affect adjustment outside the school environment. These services may provide critical support for youth facing significant home or community challenges. Communities are encouraged to consider their local policies regarding the provision of SPED Wraparound services and to identify strategies to maximize the utilization of community-based support for all youth.

The allocation and management of the funds are based on the following principles.

1. All localities should have access to and an opportunity to utilize the funds,
2. 100% of the earmarked funds will be available for allocation.

The process for allocation and management of the FY2024 SPED Wraparound funds will be as follows:

1. Allocations will be based on a running three-year average of the locality's utilization of the funds.
2. If a locality does not receive SPED Wraparound funds in the initial allocation (due to no history of utilization) or if a locality needs additional SPED Wraparound funds beyond those initially allocated, the locality can request funds by the local LEDRS Report Preparer initiating a request in the appropriate area of the Local Government Reporting section of the CSA website.



CSA Administrative Memo #23-08  
Annual Allocations

3. In January any locality, which has not posted SPED Wraparound expenditures to LEDRS, will risk having their allocation unallocated by OCS.
4. Request for additional SPED Wraparound funds will be supported based on the availability of unallocated SPED Wraparound funds. The total state allocation cannot exceed \$2.2 million.

**FY 2024 Expenditure Reporting:**

The LEDRS System will open for FY2024 program service year reporting (*services from July 1, 2023 through June 30, 2024*) on August 1, 2023. The LEDRS will be the CSA expenditure system of record and shall be the source to report and calculate the state's share of CSA reimbursement to localities.

**Attachments:**

FY2024 Base CSA State Pool Allocations

FY2024 Special Education Wraparound Allocations

FY2024 CSA Protected Allocations



# COMMONWEALTH of VIRGINIA

Scott Reiner, M.S.  
Executive Director

## OFFICE OF CHILDREN'S SERVICES *Administering the Children's Services Act*

### Administrative Memorandum #23-09

**To:** CPMT Chairs  
CSA Coordinators

**CC:** The Honorable John Littel, Secretary of Health and Human Resources  
The Honorable Leah Mills, Deputy Secretary of Health and Human Resources  
Dr. Samantha Hollins, Virginia Department of Education

**From:** Scott Reiner, Executive Director

A handwritten signature of Scott Reiner in black ink.

**Date:** September 8, 2023

**Subject:** Rate Setting for Private Day Special Education Programs

The revised state budget for FY2024, adopted by the General Assembly on September 6, 2023, has removed the requirement that the Office of Children's Services (OCS) implement statewide rate setting for private day special education (Item 285.B). Therefore, OCS Administrative Memorandum #23-06 (issued on July 24, 2023) is rescinded. Local CSA programs should negotiate rates with providers of private day special education in accordance with §2.2-5214 of the *Code of Virginia*, which states:

The rates paid for services purchased pursuant to this chapter shall be determined by competition of the market place and by a process sufficiently flexible to ensure that family assessment and planning teams and providers can meet the needs of individual children and families referred to them.

As previously instructed, CSA programs should use the Service Name Code 54 (Private Day School-Tier 1) in the Local Expenditure, Data, and Reimbursement System (LEDRS) for all in-state placements. Placements in private day programs outside of Virginia should use Service Name Code 72 (Private Day School (Out of State)).

OCS appreciates your cooperation and flexibility in implementing the Appropriation Act for FY2024 as approved by the General Assembly. Please be aware that final approval must come from the Governor. While it is not anticipated that this language in the state budget will change, the Governor's signature is the final required step in this process.

Please get in touch with my office, [scott.reiner@csa.virginia.gov](mailto:scott.reiner@csa.virginia.gov), if you require additional assistance.

## Fw: 2023 Foster Care Maintenance Rate Increase with signed budget

Wilson, Carol (CSA) <carol.wilson@csa.virginia.gov>

Mon 10/2/2023 2:12 PM

To: Wilson, Carol (CSA) <carol.wilson@csa.virginia.gov>

Cc: Reiner, Scott (CSA) <Scott.Reiner@csa.virginia.gov>

Good afternoon, CPMT Chairpersons and CSA Coordinators,

Please see below the Broadcast issued this morning by the Virginia Department of Social Services (VDSS) regarding the maintenance increase for foster parents which was included in the State budget approved last month. Foster parents receive a maintenance increase the fiscal year following the year state employees receive a raise, at the same percentage amount. This increase normally would have been implemented at the start of the 2024 State Fiscal Year, but was delayed by the lack of an approved budget. The rate increase is retroactive to July 1, 2023.

Please note it is the responsibility of the local DSS to update placement agreements. CSA offices will need this updated information for both current and retroactive payments for those children in foster care whose maintenance was funded by CSA from July 1, 2023 to the present, and to implement the new rates going forward.

Thank you, Carol

**Carol**



**Carol Chenault Wilson**  
**Senior Program Consultant**

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**From:** Fusion Server <donotreply@dss.virginia.gov>

**Sent:** Monday, October 2, 2023 10:08 AM

## FW: MHI Protocols update

Sherri Ball <SBall@d19csb.com>

Tue 8/22/2023 1:17 PM

To: Zemmitt, Jacqueline (VDSS) <Jacqueline.Zemmitt@dss.virginia.gov>; Reilly, Karen <ReillyK@chesterfield.gov>; Angel Young-Gill <aygill@dinwiddieva.us>; Kim Swenson <Kswenson@greensvillecountyva.gov>; Wanda Brown <wbrown@hopewellva.gov>; Spencer Logan (slogan@surrycountyva.gov) <slogan@surrycountyva.gov>; Tinsley, Lakeshia (VDSS) <Lakeshia1.Tinsley@dss.virginia.gov>; tnicholson@sussexcountyva.gov <tnicholson@sussexcountyva.gov>  
Cc: Diana Barnes <DBarnes@d19csb.com>; Theresa Goodman <TGoodman@d19csb.com>

1 attachment (23 KB)

MHI Protocol August 2023 (draft).docx;

Ball <SBall@d19csb.com>

Greetings CSA Coordinators,

Recently, all CSBs had to sign our Performance Contract with DBHDS. Within that contract is a document called Exhibit G, which includes specific guidance regarding MHI funding. Therefore, in order to remain in compliance with DBHDS requirements, we have just developed a revised draft of our MHI Protocols. In the past, we have developed/updated our MHI Protocols with input and approval from our CSA Coordinators, and we would like to do that again.

I am attaching a draft "MHI Protocols" document that has been updated to include the language from DBHDS. We are proposing that we adopt this language, as it offers us more flexibility in using the MHI funds. However, if any of you have questions or additional input, I would appreciate it if you could let me know by Monday, August 28<sup>th</sup>. Once the protocol is finalized, I will distribute it to all CSA Coordinators so that they can share with their CPMT if needed.

Thank you & Take Care!

Sherri

Sherri J. Ball, LPC, LMFT  
Director of Child & Adolescent Services  
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## **D19 Mental Health Initiative (MHI) Funding Plan, Protocols, and Procedures Based upon the FY24-25 Community Services Performance Contract Exhibit G**

The Mental Health Initiative (MHI) Fund was established by the General Assembly in FY 2000 to create a dedicated source of funding for mental health and substance abuse services. These services have the purpose of keeping children in their homes and communities and preserving families whenever possible. The Department of Behavioral Health & Developmental Services (DBHDS) requires that the CSB develop a Mental Health Initiative funding plan in collaboration with the local Family and Assessment Planning Teams and/or Community Policy and Management Team. This MHI Plan document addresses that requirement, and a copy of the MHI Plan will be kept on file at the CSB.

### **Target Population for MHI Funds**

- These funds shall be used exclusively for children and adolescents not mandated for services under the Children's Services Act (CSA).
- Must be used exclusively to serve currently unserved children and adolescents or provide additional services to underserved children and adolescents with serious emotional disturbances, at risk for serious emotional disturbance, and/or with co-occurring disorders with priority placed on those children who, absent services, are at-risk for removal from the home due to placement by a local department of social services, admission to a congregate care facility or acute care psychiatric hospital or crisis stabilization facility, commitment to the Department of Juvenile Justice, or parental custody relinquishment.
- "Underserved" refers to populations which are disadvantaged because of their ability to pay, ability to access care, or other disparities for reasons of race, religion, language group, sexual orientation or social status.
- Children and adolescents must be under 18 years of age at the time services are initiated. MHI funds can be used to bridge the gap between the child and adolescent and adult service systems, if the service was initiated before the adolescent's 18th birthday. Services used to bridge the gap can only be used for up to one (1) year. MHI funds cannot be used to initiate new services once an adolescent turns 18 years of age.

### **Appropriate Services to be Supported by MHI Funds**

Types of services that these funds may be used for include, but are not limited to: crisis intervention and stabilization, outpatient, intensive in-home, intensive care coordination, case management, Family Support Partners, evidence-based practices, therapeutic day treatment, alternative day support (including specialized after school and summer camp, behavior aide, or other wrap-around services), and, supervised family support services.

MHI funds should not be used when another payer source is available.

MHI funds must be used to purchase services which will be used to keep the child or adolescent in the least restrictive environment and living in the community.

Services must be based on the individual needs of the child or adolescent and must be included in an individualized services plan. Services must be child-centered, family focused, and

community-based. The participation of families is integral in the planning of these services.

Expenditures may be for something that is needed by more than one child, providing it can be linked to the individualized service plan of each child.

### **Funding Expectations**

All expenditures shall be linked to an individualized service plan for an individual child.

MHI funds may not be used for residential care services, partial or full hospitalizations, or for CSA sum sufficient populations. MHI funding may not be used to purchase vehicles, furniture, computers, or to provide training.

CSBs may use MHI funds to support personnel used to provide services to children and families. For example, the funds may be used to create a position dedicated to serving the non-CSA mandated population of children in the community; however, each service provided should be linked to an individualized service plan for an individual child and reported through the CCC3 by using Consumer Designation Code 915 code.

CSBs may use up to 10% of the total MHI fund allocation for administrative costs associated with the overall MHI fund management and administration. Administrative costs include non-direct service personnel and supplies.

The CSB may carry-forward a balance in the MHI fund during the biennium in which the funds were distributed. If the CSB has a balance of 10% or greater, of the current allocation, at the end of the biennium, the CSB shall work with DBHDS to develop a plan to spend the end of the biennium balance. If the CSB is unable to spend the carry-forward balance within an agreed upon timeframe and, continues to have a carry-forward balance greater than 10%, DBHDS may pause payments of the current allocation.

### **Collaborative Plan for Accessing Services**

Although these funds are designed to address some of the gaps in funding for services for non-CSA mandated children and adolescents, in addition to this dedicated source of funding, a collaborative, interagency approach with creative and innovative treatment strategies will be necessary to serve this challenging population of children and families in need. The CSB will seek input and guidance in the formulation of this protocol from other FAPT and CPMT member agencies. The MHI Plan will be reviewed/approved by the CPMTs of the localities.

### **Referral Procedures for Mental Health Initiative Funds**

District 19 will make every team aware of the contact information for the D19 MHI Case Manager.

Per DBHDS, these funds do not have to go through the FAPT for review, unless the locality desires. In that case, the FAPT/Lead Agency representative presents a case for staffing. FAPT reviews criteria to determine whether case is eligible for MHI funds. If the case meets eligibility criteria and child is considered a viable candidate for MHI funds, a referral to the D19 MHI Case Manager is made.

The following documentation must be completed and forwarded to the D19 MHI Case Manager when a referral is made: **IFSP; CANS (optional); two D19 authorization to disclose confidential information forms (for CSA vendor and for FAPT/CPMT).**

The D19 MHI Case Manager reviews the referral packet, determines eligibility for MHI-funded services and completes the required D19 Mental Health Initiative ISP Summary Form. The ISP Summary Form is then forwarded to CPMT chair/designee for final authorization/processing. Once approved by CPMT chair/designee, MHI CM will contact consumer/responsible party (i.e., parent/legal guardian), complete SED or at-risk checklist, MHI CM ISP, and gather supporting documentation for identified MHI vendor to begin services. ***Services will not be initiated until D19 has received signed MHI vendor contract and has forwarded copy of approved MHI ISP summary form to vendor, accordingly.***

*\*An authorized CPMT representative must sign the Mental Health Initiative ISP Summary Form to indicate approval for use of Mental Health Initiative Funds.*

#### **Accountability and Reporting Requirements for Mental Health Initiative Funds (MHI)**

D19 will maintain an open/enrolled case and case record on all children receiving MHI-funded services.

The D19 MHI Case Manager should ensure that all funds are obligated by June 30th of each year, with all funds being expended no later than September 30th of each year.

The D19 MHI Case Manager will monitor MHI services and expenditures by contacting the child, parent(s), and vendors at least once a month. The MHI Case Manager will review all MHI invoices to ensure accuracy and to make certain that all invoices are accompanied by documentation that must substantiate billing (including progress notes for each service, by date and duration).

**Created: November 2012**

**Revised: October 2016**

**January 2021**

**April 2022**

**August 2023**