

CPMT PACKET

07/09/2015

Winchester CPMT Agenda

July 9, 2015, 2:00pm

WDSS, 24 Baker St

Winchester, VA 22601

Approve Minutes from 06/9/15

Announcements

Financial Report

- a. Review of June 2015 Financials

Old Business

- a. Strategic Planning & Assignment of Work Committees
 1. Goal 1: Common Ground through Education, Training and Shared Expectations (Gleason, Kish, Roussos, Devine, Kiser)
 2. Goal 2: Data-Driven Accountability and Service Provision (Scardino, Bober)
 3. Goal 3: Ensure Quality and Appropriate Level of Services through UM and UR (Dopkowski)

New Business

- a. UR Policy Draft
- b. Legislation – Residential Treatment Facilities education funding, tabled by SEC indefinitely
- c. Administrative Memo #15-05 – Revised CSA Policy Manual and New CSA User Guide

Motion to Convene in 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.

Motion to Come Out of Executive Session & Immediately Reconvene in Open Session

Motion to Certify Compliance by Roll Call Vote

Move that the members of the Winchester City 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.

Motion to Approve All Cases

Motion to Adjourn

Next Meeting: Thursday August 13, 2015 at 2:00 at WDSS Boardroom

**JUNE MINUTES WITH
MAY FINANCIALS**

Minutes
Winchester CPMT
10 Baker Street
Tuesday, June 9, 2015
1:30 p.m.

MEMBERS PRESENT

Mary Blowe, City of Winchester
Kelly Bober, Child Advocacy Center
Amber Dopkowski, Winchester Dept. of Social Services
Mark Gleason, Northwestern Community Services Board
Lyda Kiser, Parent Representative
Peter Roussos, Dept. of Juvenile Justice
Paul Scardino, National Counseling Group

MEMBERS/OTHERS NOT PRESENT

Dr. Charles Devine, Virginia Dept. of Health
Eden Freeman, City of Winchester
Sarah Kish, Winchester Public Schools

Others Present:

Karen Farrell, Winchester CSA Coordinator
Connie Greer, Winchester Dept. of Social Services

RECAP OF CPMT VOTES:

Motion:

- Motion to change the order of the Agenda for June 9, 2015 CPMT Meeting, so that Executive Session immediately follows financial report.
- Motion to approve the minutes from May 12, 2015, CPMT Meeting
- 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.
- Motion to come out of Executive Session
- Motion to Certify Compliance by Roll Call Vote Move that the members of the Winchester 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.
- Motion to Approve All Cases, as presented.
- Motion to request City Attorney to review draft CSA Purchase of Services Agreement
- Motion to adopt Resolution 2015-02
- Motion to request WRAP funds for FY2016

Action:

- 1st: Mr. Gleason
- 2nd: Mr. Roussos
- 1st: Ms. Dopkowski
- 2nd: Ms. Bober
- 1st: Ms. Kiser
- 2nd: Mr. Roussos

- 1st: Mr. Scardino
- 2nd: Mr. Roussos
- 1st: Ms. Kiser
- 2nd: Ms. Dopkowski

- 1st: Ms. Dopkowski
- 2nd: Ms. Bober
- Mr. Gleason – abstained from 1 case
- Mr. Scardino – abstained from 4 cases
- 1st: Ms. Kiser
- 2nd: Mr. Scardino
- 1st: Mr. Scardino
- 2nd: Ms. Kiser
- 1st: Mr. Gleason
- 2nd: Ms. Kiser

Status:

- Approved
- Unanimously
- Approved
- Unanimously
- Approved
- Unanimously

- Approved
- Unanimously
- Approved
- Unanimously

- Approved
- Unanimously
- Approved
- Unanimously
- Approved
- Unanimously

- Motion was approved with noted abstentions

- Approved
- Unanimously
- Approved
- Unanimously
- Approved
- Unanimously

Minutes
 Winchester CPMT
 10 Baker Street
 Tuesday, June 9, 2015
 1:30 p.m.

| Item | Discussion | Action |
|--|--|--|
| | Encumbered: \$9,175.00 Disbursed: \$10,106.45 Remaining Funds: \$880.55 Unduplicated CSA Case Count: 101 Average Spent per Child: \$13,379.68 | |
| Motion to Convene in 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. | Mr. Gleason asked that the meeting move into Executive Session. On motion by Ms. Kiser, seconded by Mr. Roussos, the meeting moved into Executive Session. |
| Motion to Come Out of Executive Session & Immediately Reconvene in Open Session | | Motion to come out of Executive Session by Mr. Scardino and seconded by Mr. Roussos. Approved unanimously. |
| Motion to Certify Compliance by Roll Call Vote | Move that the members of the Winchester 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. | Motion to Certify Compliance by Roll Call Vote was made by Ms. Kiser, seconded by Ms. Dopkowski, and unanimously approved. |
| Motion to Approve All Cases | Motion to Approve all cases as accepted or amended. Mr. Gleason – abstained from 1 case Mr. Scardino – abstained from 4 cases | All cases were approved, on motion by Ms. Dopkowski, seconded by Ms. Bober. Motion was approved with noted abstentions. |

Minutes
 Winchester CPMT
 10 Baker Street
 Tuesday, June 9, 2015
 1:30 p.m.

| Item | Discussion | Action |
|---|---|--|
| <p>Old Business:</p> <p>a. Strategic Planning Report- Assignment of Work Committees</p> | <p>Strategic Target Areas were realigned as follows:</p> <ol style="list-style-type: none"> 1. Common Ground through Education, Training and Shared Expectations (Gleason, Kish, Roussos, Devine, Kiser) 2. Data-Driven Accountability and Service Provision (Scardino, Bober) 3. Ensure Quality and Appropriate Level of Services through UM and UR (Dopkowski) | <ol style="list-style-type: none"> 1. No report 2. CPMT members had been requested to review and provide their comments about the Purchase of Service Agreement to Mr. Scardino directly. The document has been reviewed with Winchester DSS Administrative Services Manager. Renewal terms for the Agreement were discussed. CPMT validated the necessity of a separate CSA Purchase of Services Contract citing issues of vendor accountability, CSA requirements, and that there are portions of the contract which are not reflected on a Purchase Order. Ms. Kiser motioned to request City Attorney to review draft CSA Purchase of Services Agreement. Motion passed unanimously 3. No report. |
| <p>b. Resolution for next year's CPMT meeting day, time and location.</p> | <p>Ms. Farrell polled CPMT members, prior to May's meeting to determine a mutually convenient day/time/location to hold CPMT meetings in Fiscal Year 2016. The second Thursday of each month at 2:00 p.m. at Winchester Social Services office was determined to be the most mutually convenient day, time and location. A motion was passed last month to change the day/time/location, above.</p> | <p>Mr. Scardino motioned to adopt Resolution 2015-02. Ms. Kiser seconded the motion. The motion passed unanimously. Mr. Gleason signed the approved resolution.</p> |
| <p>c. Supplemental Funding Request</p> | <p>Ms. Farrell prepared a FY15 Supplemental Funding Request in the amount of \$455,458.00, which was approved by the Office of Children's Services</p> | <p>No CPMT action required.</p> |

Minutes
 Winchester CPMT
 10 Baker Street
 Tuesday, June 9, 2015
 1:30 p.m.

| Item | Discussion | Action |
|---|---|---|
| d. Parental Referral Process | Draft language for new section 2.4.4. was proposed and approved last month for the CSA Policy, which sets forth the direct referral process for parents or guardians of a child. | Ms. Farrell updated the policy on the city website and associated documents. She will also contact case managers to make sure they are aware of the new policy. |
| New Business: a. State CSA Meeting Report 1. Broadcast 9091 2. Broadcast 9088 3. Broadcast 9176 4. Guidelines for Determining Levels of Foster Care Services with LCPA | Ms. Farrell attended the State CSA meeting in May. Educational Costs for Children with Adoption Assistance. Clarification was provided on the policy. Provision of Services to Former Foster Care Children 18-21 years old. FAQ Provision of Services to former Foster Care Youth who turn 18 in Foster Care. Clarification was provided on the policy. Local Placement Agencies now must assign a placement level to therapeutic foster care placements within 60 days of placement. | CPMT reviewed policy. Ms. Farrell will insure CSA compliance with the policy CPMT reviewed policy. CPMT reviewed policy |
| b. Admin Memo #15-02 | FY16 Wrap-Around Services for Students with Disabilities funds need to be requested from OCS if desired. | Mr. Gleason motioned to request WRAP funds for FY2016. Ms. Kiser seconded the motion. The motion passed unanimously. Ms. Farrell will prepare and submit the request. |
| c. Admin Memo #15-03 | Name Change for the Office of Comprehensive Services and the Comprehensive Services Act. The Office of Comprehensive Services is changing its name to the Office of Children's Services, effective July 1, 2015. Furthermore, the Comprehensive Services Act shall henceforth be known as the Children's Services Act, effective July 1, 2015. | Mr. Scardino motioned to change references in all CSA documents from "Office of Comprehensive Services" to "Office of Children's Services" and "Comprehensive Services Act" to "Children's Services Act". Ms. Kiser seconded the motion. The motion passed unanimously. Ms. Farrell to update the CSA policy on the city website and associated documents with the changes. |
| Motion to Adjourn/Next Meeting Date | The next CPMT meeting will be held Thursday, July 9, 2015 at 1:30 p.m., Winchester Social Services Department, 24 Baker Street, Conference Room, Winchester VA | The meeting was adjourned at 2:35 p.m. |

Minutes
Winchester CPMT
10 Baker Street
Tuesday, June 9, 2015
1:30 p.m.

Attachments: May 2014 Financials
CPMT Strategic Plan Outstanding Goals
DRAFT Agreement for Purchases of Services
Resolution 2015-02
FAPT Referral Process for Parents or Guardians of a Child
Broadcast 9091
Broadcast 9088
Broadcast 9176
Guidelines for Determining Levels of Care for Foster Care Services with LCPAs
Administrative Memo #15-02
Administrative Memo #15-03

Transcribed by CPG

DRAFT

CSA Pool Reimbursement Request Report Worksheet

Chart A

Date: May 27, 2015
 Period Ending: May, 2015

Part 1 - Expenditure Description

| | Number of Clients | Gross Total Expenditures | Expenditure Refunds | Net Total Expenditures |
|--|-------------------|--------------------------|---------------------|------------------------|
| 1. Congregate Care/Mandated & Non-Mandated Residential Services | | | | |
| 1a. Foster Care - IV-E Child in Licensed Residential Congregate Care | | 0.00 | | 0.00 |
| 1b. Foster Care - all other in Licensed Residential Congregate Care | | 0.00 | 277.65 | -277.65 |
| 1c. Residential Congregate Care - CSA Parental Agreements; DSS Non-Custodial | 1 | 7,691.40 | | 7,691.40 |
| 1d. Non-Mandated Services/Residential/Congregate Care | | 0.00 | | 0.00 |
| 1e. Educational Services - Congregate Care | 3 | 34,683.06 | | 34,683.06 |
| 2. Other Mandated Services | | | | |
| 2a. Treatment Foster Care - IV-E | 7 | 18,726.75 | 1,305.00 | 17,421.75 |
| 2a.1 Treatment Foster Care | 3 | 12,364.60 | | 12,364.60 |
| 2a.2 Treatment Foster Care - CSA Parental Agreements; DSS Non-Custodial | | 0.00 | | 0.00 |
| 2b. Specialized Foster Care - IV-E; Community Based Services | | 0.00 | | 0.00 |
| 2b.1 Specialized Foster Care | | 0.00 | | 0.00 |
| 2c. Family Foster Care - IV-E; Community Based Services | 7 | 4,732.00 | 300.00 | 4,432.00 |
| 2d. Family Foster Care Maintenance Only | 1 | 686.00 | 689.15 | -3.15 |
| 2e. Family Foster Care - Children Receiving Maintenance/Basic Activities; IL | 5 | 2,554.97 | 205.43 | 2,349.54 |
| 2f. Community Based Services | 25 | 29,830.63 | 253.00 | 29,577.63 |
| 2f.1 Community Transition Services | | 0.00 | | 0.00 |
| 2g. Special Education Private Day Placement | 2 | 9,043.80 | | 9,043.80 |
| 2h. Wrap-Around Services for Students With Disabilities | 1 | 4,112.28 | | 4,112.28 |
| 2i. Psychiatric Hospitals/Crisis Stabilization Units | | 0.00 | | 0.00 |
| 3. Non-Mandated Services/Community Based | 3 | 2,145.35 | | 2,145.35 |
| 4. Grand Totals: Sum of categories 1 through 3 | 58 | 126,570.84 | 3,030.23 | 123,540.61 |

Part 2 - Expenditure Refund Description (reported in line 4)

| | |
|--|-----------------|
| Vendor Refunds and Payment Cancellations | |
| Parental Co-Payments | |
| Payments made on behalf of the child (SSA, SSI, VA benefits) | 921.00 |
| Child Support Collections through DCSE | 463.23 |
| Pool prior-reported expenditures re-claimed under IV-E | |
| Other - Reclaim from CSA to Respite | 450.00 |
| Other - Reclaim from CSA to Independent Living | 1,080.00 |
| Other - Reclaim from CSA to Safe and Stable Funds | 116.00 |
| Total Refunds (must agree with line 4) | 3,030.23 |



Chart B

**CSA Reports
Pool Reimbursement Reports
FY15
Transaction History for Winchester - FIPS 840
Pended Forms are not on this report**

Active Pool Report Preparers
Nancy Valentine (540) 686-4838
Donna Veach (540) 686-4826
Amber Johnson (540) 686-4823
Karen Farrell (540) 686-4832

Transaction History

| Match Rate: 0.4587 | Status | Period End | Date Filed | Total Amount | State | Local |
|--|--------|------------|------------|-----------------------|---------------------|---------------------|
| Beginning Balance | | | | \$1,206,997.00 | \$653,308.99 | \$553,688.01 |
| Pool Reimbursement History | | | | | | |
| | 2 | 07/31/2014 | 08/06/2014 | \$271.75 | \$129.94 | \$141.81 |
| | 2 | 08/31/2014 | 09/03/2014 | \$66,462.27 | \$37,034.51 | \$29,427.76 |
| | 2 | 09/30/2014 | 10/02/2014 | \$121,923.88 | \$68,589.95 | \$53,333.93 |
| | 2 | 10/31/2014 | 11/03/2014 | \$126,088.83 | \$67,498.17 | \$58,590.66 |
| | 2 | 11/30/2014 | 12/03/2014 | \$164,640.34 | \$88,596.71 | \$76,043.63 |
| | 2 | 12/31/2014 | 01/07/2015 | \$204,456.19 | \$111,822.17 | \$92,634.02 |
| | 2 | 01/31/2015 | 02/06/2015 | \$105,557.78 | \$57,224.70 | \$48,333.08 |
| | 2 | 02/28/2015 | 03/03/2015 | \$183,358.95 | \$100,486.68 | \$82,872.27 |
| | 2 | 03/31/2015 | 04/02/2015 | \$100,991.97 | \$57,276.95 | \$43,715.02 |
| | 2 | 04/30/2015 | 05/11/2015 | \$153,605.45 | \$87,648.58 | \$65,956.87 |
| | 1 | 05/31/2015 | 06/02/2015 | \$123,540.61 | \$74,312.51 | \$49,228.10 |
| Pool Reimbursement Expenditure Totals | | | | \$1,350,898.02 | \$750,620.87 | \$600,277.15 |
| Supplement History | | | | | | |
| | | | 01/21/2015 | \$46,431.00 | \$41,261.00 | \$5,170.00 |
| | | | 05/12/2015 | \$15,477.00 | \$13,754.00 | \$1,723.00 |
| | | | 05/20/2015 | \$455,458.00 | \$270,867.00 | \$184,591.00 |
| Supplement Totals | | | | \$517,366.00 | \$325,882.00 | \$191,484.00 |
| CSA System Balance | | | | \$373,464.98 | \$228,570.12 | \$144,894.86 |

Transaction History without WRAP Dollars

| Match Rate: 0.4587 | Status | Period End | Date Filed | Total Amount | State | Local |
|--|--------|------------|------------|-----------------------|---------------------|---------------------|
| Beginning Balance | | | | \$1,176,583.00 | \$636,846.99 | \$539,736.01 |
| Pool Reimbursement History | | | | | | |
| | - | 07/31/2014 | 08/06/2014 | \$271.75 | \$129.94 | \$141.81 |
| | - | 08/31/2014 | 09/03/2014 | \$66,462.27 | \$37,034.51 | \$29,427.76 |
| | - | 09/30/2014 | 10/02/2014 | \$121,923.88 | \$68,589.95 | \$53,333.93 |
| | - | 10/31/2014 | 11/03/2014 | \$126,088.83 | \$67,498.17 | \$58,590.66 |
| | - | 11/30/2014 | 12/03/2014 | \$163,207.34 | \$87,821.03 | \$75,386.31 |
| | - | 12/31/2014 | 01/07/2015 | \$200,570.58 | \$109,718.89 | \$90,851.69 |
| | - | 01/31/2015 | 02/06/2015 | \$103,841.48 | \$56,295.67 | \$47,545.81 |
| | - | 02/28/2015 | 03/03/2015 | \$182,547.45 | \$100,047.42 | \$82,500.03 |
| | - | 03/31/2015 | 04/02/2015 | \$99,660.69 | \$56,556.33 | \$43,104.36 |
| | - | 04/30/2015 | 05/11/2015 | \$153,605.45 | \$87,648.58 | \$65,956.87 |
| | - | 05/31/2015 | 06/02/2015 | \$119,428.33 | \$72,086.53 | \$47,341.80 |
| Pool Reimbursement Expenditure Totals | | | | \$1,337,608.05 | \$743,427.02 | \$594,181.03 |
| Supplement History | | | | | | |
| | | | 01/21/2015 | \$46,431.00 | \$41,261.00 | \$5,170.00 |
| | | | 05/12/2015 | \$15,477.00 | \$13,754.00 | \$1,723.00 |
| | | | 05/20/2015 | \$455,458.00 | \$270,867.00 | \$184,591.00 |
| Supplement Totals | | | | \$517,366.00 | \$325,882.00 | \$191,484.00 |
| CSA System Balance (Non-WRAP): | | | | \$356,340.95 | \$219,301.97 | \$137,038.98 |

Wrap-Around Services for Students with Disabilities
2014 - 2015

Chart C

| Child | 3 | 12 | 18 | TOTAL SPENT |
|-----------------|----------|----------|-------------------|----------------|
| Agency | WPS | WPS-NREP | WPS-NREP | |
| Worker | Mck | Clatter | Clatter | |
| JUL | | | | 0.00 |
| AUG | | | | 0.00 |
| SEP | | | | 0.00 |
| OCT | | | | 0.00 |
| NOV | 300.00 | | 1,133.00 | 1,433.00 |
| DEC | 260.00 | | 3,625.61 | 3,885.61 |
| JAN | 470.00 | | 1,246.30 | 1,716.30 |
| FEB | 245 | | 566.50 | 811.50 |
| MAR | | | 1,331.28 | 1,331.28 |
| APR | | | | 0.00 |
| MAY | | | 4,112.28 | 4,112.28 |
| JUN | | | | 0.00 |
| TOTAL/ CHILD | 1,275.00 | 0.00 | 12,014.97 | 13,289.97 |
| | | | Beginning Balance | 30,414.00 |
| | | | Disbursed | 13,289.97 |
| | | | Encumbered | 2,549.25 |
| | | | Remaining Funds | 14,574.78 |

JUNE FINANCIALS

CSA Pool Reimbursement Request Report Worksheet

Chart A

Date: July 2, 2015
 Period Ending: June, 2015

Part 1 - Expenditure Description

| | Number of Clients | Gross Total Expenditures | Expenditure Refunds | Net Total Expenditures |
|--|-------------------|--------------------------|---------------------|------------------------|
| 1. Congregate Care/Mandated & Non-Mandated Residential Services | | | | |
| 1a. Foster Care - IV-E Child in Licensed Residential Congregate Care | | 0.00 | | 0.00 |
| 1b. Foster Care - all other in Licensed Residential Congregate Care | | 0.00 | 81.83 | -81.83 |
| 1c. Residential Congregate Care - CSA Parental Agreements; DSS Non-Custodial | 5 | 28,384.06 | | 28,384.06 |
| 1d. Non-Mandated Services/Residential/Congregate Care | | 0.00 | | 0.00 |
| 1e. Educational Services - Congregate Care | 3 | 24,970.06 | | 24,970.06 |

2. Other Mandated Services

| | | | | |
|--|-----------|-------------------|-----------------|-------------------|
| 2a. Treatment Foster Care - IV-E | 11 | 23,337.95 | 145.00 | 23,192.95 |
| 2a.1 Treatment Foster Care | 3 | 21,889.40 | | 21,889.40 |
| 2a.2 Treatment Foster Care - CSA Parental Agreements; DSS Non-Custodial | | 0.00 | | 0.00 |
| 2b. Specialized Foster Care - IV-E; Community Based Services | | 0.00 | | 0.00 |
| 2b.1 Specialized Foster Care | | 0.00 | | 0.00 |
| 2c. Family Foster Care - IV-E; Community Based Services | 6 | 7,980.00 | | 7,980.00 |
| 2d. Family Foster Care Maintenance Only | 1 | 686.00 | 687.52 | -1.52 |
| 2e. Family Foster Care - Children Receiving Maintenance/Basic Activities; IL | 4 | 1,795.39 | 205.43 | 1,589.96 |
| 2f. Community Based Services | 25 | 21,640.89 | 67.00 | 21,573.89 |
| 2f.1 Community Transition Services | | 0.00 | | 0.00 |
| 2g. Special Education Private Day Placement | 2 | 12,323.36 | | 12,323.36 |
| 2h. Wrap-Around Services for Students With Disabilities | 1 | 1,416.25 | | 1,416.25 |
| 2i. Psychiatric Hospitals/Crisis Stabilization Units | | 0.00 | | 0.00 |
| 3. Non-Mandated Services/Community Based | 4 | 2,391.10 | | 2,391.10 |
| 4. Grand Totals: Sum of categories 1 through 3 | 65 | 146,814.46 | 1,186.78 | 145,627.68 |

Part 2 - Expenditure Refund Description (reported in line 4)

| | | |
|--|--|-----------------|
| Vendor Refunds and Payment Cancellations | | |
| Parental Co-Payments | | |
| Payments made on behalf of the child (SSA, SSI, VA benefits) | | 921.00 |
| Child Support Collections through DCSE | | 265.78 |
| Pool prior-reported expenditures re-claimed under IV-E | | |
| Other (specify) | | |
| Total Refunds (must agree with line 4) | | 1,186.78 |

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Chart B



Contact Us

CSA Reports
Pool Reimbursement Reports
FY15
Transaction History for Winchester - FIPS 840
 Pended Forms are not on this report

Active Pool Report Preparers
Nancy Valentine (540) 686-4838
Donna Veach (540) 686-4826
Amber Johnson (540) 686-4823
Karen Farrell (540) 686-4832

Transaction History

| Match Rate: 0.4587 | Status | Period End | Date Filed | Total Amount | State | Local |
|--|--------|------------|------------|-----------------------|---------------------|---------------------|
| Beginning Balance | | | | \$1,206,997.00 | \$653,308.99 | \$553,688.01 |
| Pool Reimbursement History | | | | | | |
| | 9 | 07/31/2014 | 08/06/2014 | \$271.75 | \$129.94 | \$141.81 |
| | 9 | 08/31/2014 | 09/03/2014 | \$66,462.27 | \$37,034.51 | \$29,427.76 |
| | 9 | 09/30/2014 | 10/02/2014 | \$121,923.88 | \$68,589.95 | \$53,333.93 |
| | 9 | 10/31/2014 | 11/03/2014 | \$126,088.83 | \$67,498.17 | \$58,590.66 |
| | 9 | 11/30/2014 | 12/03/2014 | \$164,640.34 | \$88,596.71 | \$76,043.63 |
| | 9 | 12/31/2014 | 01/07/2015 | \$204,456.19 | \$111,822.17 | \$92,634.02 |
| | 9 | 01/31/2015 | 02/06/2015 | \$105,557.78 | \$57,224.70 | \$48,333.08 |
| | 9 | 02/28/2015 | 03/03/2015 | \$183,358.95 | \$100,486.68 | \$82,872.27 |
| | 9 | 03/31/2015 | 04/02/2015 | \$100,991.97 | \$57,276.95 | \$43,715.02 |
| | 9 | 04/30/2015 | 05/11/2015 | \$153,605.45 | \$87,648.58 | \$65,956.87 |
| | 9 | 05/31/2015 | 06/02/2015 | \$123,540.61 | \$74,312.51 | \$49,228.10 |
| | 1 | 06/30/2015 | 07/07/2015 | \$145,627.68 | \$82,906.98 | \$62,720.70 |
| Pool Reimbursement Expenditure Totals | | | | \$1,496,525.70 | \$833,527.85 | \$662,997.85 |
| Supplement History | | | | | | |
| | | | 01/21/2015 | \$46,431.00 | \$41,261.00 | \$5,170.00 |
| | | | 05/12/2015 | \$15,477.00 | \$13,754.00 | \$1,723.00 |
| | | | 05/20/2015 | \$455,458.00 | \$270,867.00 | \$184,591.00 |
| Supplement Totals | | | | \$517,366.00 | \$325,882.00 | \$191,484.00 |
| CSA System Balance | | | | \$227,837.30 | \$145,663.14 | \$82,174.16 |

Transaction History without WRAP Dollars

| Match Rate: 0.4587 | Status | Period End | Date Filed | Total Amount | State | Local |
|--|--------|------------|------------|-----------------------|---------------------|---------------------|
| Beginning Balance | | | | \$1,176,583.00 | \$636,846.99 | \$539,736.01 |
| Pool Reimbursement History | | | | | | |
| | - | 07/31/2014 | 08/06/2014 | \$271.75 | \$129.94 | \$141.81 |
| | - | 08/31/2014 | 09/03/2014 | \$66,462.27 | \$37,034.51 | \$29,427.76 |
| | - | 09/30/2014 | 10/02/2014 | \$121,923.88 | \$68,589.95 | \$53,333.93 |
| | - | 10/31/2014 | 11/03/2014 | \$126,088.83 | \$67,498.17 | \$58,590.66 |
| | - | 11/30/2014 | 12/03/2014 | \$163,207.34 | \$87,821.03 | \$75,386.31 |
| | - | 12/31/2014 | 01/07/2015 | \$200,570.58 | \$109,718.89 | \$90,851.69 |
| | - | 01/31/2015 | 02/06/2015 | \$103,841.48 | \$56,295.67 | \$47,545.81 |
| | - | 02/28/2015 | 03/03/2015 | \$182,547.45 | \$100,047.42 | \$82,500.03 |
| | - | 03/31/2015 | 04/02/2015 | \$99,660.69 | \$56,556.33 | \$43,104.36 |
| | - | 04/30/2015 | 05/11/2015 | \$153,605.45 | \$87,648.58 | \$65,956.87 |
| | - | 05/31/2015 | 06/02/2015 | \$119,428.33 | \$72,086.53 | \$47,341.80 |
| | - | 06/30/2015 | 07/07/2015 | \$144,211.43 | \$82,140.36 | \$62,071.07 |
| Pool Reimbursement Expenditure Totals | | | | \$1,481,819.48 | \$825,567.38 | \$656,252.10 |

| Supplement History | | | | |
|---------------------------------------|------------|---------------------|---------------------|---------------------|
| | 01/21/2015 | \$46,431.00 | \$41,261.00 | \$5,170.00 |
| | 05/12/2015 | \$15,477.00 | \$13,754.00 | \$1,723.00 |
| | 05/20/2015 | \$455,458.00 | \$270,867.00 | \$184,591.00 |
| Supplement Totals | | \$517,366.00 | \$325,882.00 | \$191,484.00 |
| CSA System Balance (Non-WRAP): | | \$212,129.52 | \$137,161.61 | \$74,967.91 |

Transaction History WRAP dollars only

| Match Rate: 0.4587 | Status | Period End | Date Filed | Total Amount | State | Local |
|---|--------|------------|------------|--------------------|--------------------|--------------------|
| WRAP Allocation Additions History | | | | | | |
| | | | 08/06/2014 | \$18,805.00 | \$10,178.00 | \$8,626.00 |
| | | | 10/26/2014 | \$11,609.00 | \$6,283.00 | \$5,325.00 |
| WRAP Allocation Additions Totals | | | | \$30,414.00 | \$16,461.00 | \$13,951.00 |
| Pool Reimbursement History - WRAP only | | | | | | |
| - | | 07/31/2014 | 08/06/2014 | \$0.00 | \$0.00 | \$0.00 |
| - | | 08/31/2014 | 09/03/2014 | \$0.00 | \$0.00 | \$0.00 |
| - | | 09/30/2014 | 10/02/2014 | \$0.00 | \$0.00 | \$0.00 |
| - | | 10/31/2014 | 11/03/2014 | \$0.00 | \$0.00 | \$0.00 |
| - | | 11/30/2014 | 12/03/2014 | \$1,433.00 | \$775.68 | \$657.32 |
| - | | 12/31/2014 | 01/07/2015 | \$3,885.61 | \$2,103.28 | \$1,782.33 |
| - | | 01/31/2015 | 02/06/2015 | \$1,716.30 | \$929.03 | \$787.27 |
| - | | 02/28/2015 | 03/03/2015 | \$811.50 | \$439.26 | \$372.24 |
| - | | 03/31/2015 | 04/02/2015 | \$1,331.28 | \$720.62 | \$610.66 |
| - | | 04/30/2015 | 05/11/2015 | \$0.00 | \$0.00 | \$0.00 |
| - | | 05/31/2015 | 06/02/2015 | \$4,112.28 | \$2,225.98 | \$1,886.30 |
| - | | 06/30/2015 | 07/07/2015 | \$1,416.25 | \$766.62 | \$649.63 |
| Pool Reimbursement Expenditure Totals -WRAP only | | | | \$14,706.22 | \$7,960.47 | \$6,745.75 |
| CSA System Balance (WRAP only): | | | | \$15,707.78 | \$8,501.53 | \$7,206.25 |

The Office of Children's Services © 2015
 1001 State Road, Ste 137, Richmond, VA 23220
 Phone (804) 692-9815 Fax (804) 692-9871

Please direct questions and comments concerning this website to csa.offic@csa.virginia.gov or Children's Services Act, Commonwealth of Virginia [Web Policy](#)

Wrap-Around Services for Students with Disabilities
2014 - 2015

Chart C

| Child | 3 | 12 | 18 | TOTAL SPENT |
|---------------|------------|-----------------|-------------------|-------------|
| Agency | WPS | WPS-NREP | WPS-NREP | |
| Worker | McK | Clatter | Clatter | |
| JUL | | | | 0.00 |
| AUG | | | | 0.00 |
| SEP | | | | 0.00 |
| OCT | | | | 0.00 |
| NOV | 300.00 | | 1,133.00 | 1,433.00 |
| DEC | 260.00 | | 3,625.61 | 3,885.61 |
| JAN | 470.00 | | 1,246.30 | 1,716.30 |
| FEB | 245 | | 566.50 | 811.50 |
| MAR | | | 1,331.28 | 1,331.28 |
| APR | | | | 0.00 |
| MAY | | | 4,112.28 | 4,112.28 |
| JUN | | | 1,416.25 | 1,416.25 |
| TOTAL/CHILD | 1,275.00 | 0.00 | 13,431.22 | 14,706.22 |
| | | | Beginning Balance | 30,414.00 |
| | | | Disbursed | 14,706.22 |
| | | | Encumbered | 1,133.00 |
| | | | Remaining Funds | 14,574.78 |

Non-Mandated Funds
2014 - 2015

Chart D

| Child | 15 | 16 | 17 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | TOTAL SPENT |
|-----------------|--------|----------|----------|----------|--------|----------|-------------------|--------|--------|--------|----------------|
| Agency | WPS | NWCSB | WPS | DJJ | DSS | WPS | DJJ | WPS | WPS | DSS | |
| Worker | Mck | Connell | Mck | Young | Penn | Mck | Perry | Mck | Mck | SNYDER | |
| JUL | | | | | | | | | | | 0.00 |
| AUG | | 669.80 | | | | | | | | | 669.80 |
| SEP | 210.00 | 953.05 | 265.00 | | | | | | | | 1,428.05 |
| OCT | 100.00 | | | | | | | | | | 100.00 |
| NOV | | 613.15 | 255.00 | 550.00 | | | | | | | 1,418.15 |
| DEC | | 773.10 | 265.00 | 445.00 | | | | | | | 1,483.10 |
| JAN | | | 125.00 | 200.00 | | | | | | | 325.00 |
| FEB | | | 210.00 | | 350.00 | | | | | | 560.00 |
| MAR | | | 280.00 | | | | | | | | 280.00 |
| APR | | | 420.00 | 480.00 | | 252.00 | 545.00 | | | | 1,697.00 |
| MAY | | | 415.00 | 840.00 | | | 535.00 | 355.35 | | | 2,145.35 |
| JUN | | | 250.00 | 900.00 | | 896.10 | | | 285.00 | 60.00 | 2,391.10 |
| JUN 1 | | | | | | | | | | | 0.00 |
| TOTAL/ CHILD | 310.00 | 3,009.10 | 2,485.00 | 3,415.00 | 350.00 | 1,148.10 | 1,080.00 | 355.35 | | | 12,152.55 |
| | | | | | | | Beginning Balance | | | | 20,162.00 |
| | | | | | | | Disbursed | | | | 12,152.55 |
| | | | | | | | Encumbered | | | | 3,960.00 |
| | | | | | | | Remaining Funds | | | | 4,049.45 |

Chart F

CITY OF WINCHESTER
 COMPREHENSIVE SERVICES FUND BALANCE
 COMPREHENSIVE SERVICE ACT

| FUND NAME | ORIGINAL BUDGET | BUDGET REVISIONS | REVISED BUDGET | EXPENDITURES | FUND BALANCE | ENCUMBRANCES | FUND BALANCE |
|---|-----------------|------------------|----------------|--------------|--------------|--------------|--------------|
| C15 CSA MANDATED 14/15 ASSIST | 5,000.00 | 0.00 | 5,000.00 | 2,420.32 | 2,579.68 | 0.00 | 2,579.68 |
| C15 CSA MANDATED 14/15 POS | 1,688,949.00 | 0.00 | 1,688,949.00 | 1,463,255.30 | 225,693.70 | 260,824.12 | (35,130.42) |
| C15 CSA NON-MANDATED 14/15 POS | 20,162.00 | 0.00 | 20,162.00 | 12,497.55 | 7,664.45 | 3,615.00 | 4,049.45 |
| C15 CSA W/A SRVS FOR STUDENTS 14/15 POS | 30,414.00 | 0.00 | 30,414.00 | 14,706.22 | 15,707.78 | 1,133.00 | 14,574.78 |
| C16 CSA MANDATED 15/16 POS | 0.00 | 0.00 | 0.00 | 34.99 | (34.99) | 262,676.15 | (262,711.14) |
| C16 CSA NON-MANDATED 15/16 POS | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 380.00 | (380.00) |
| | 1,744,525.00 | 0.00 | 1,744,525.00 | 1,492,914.38 | 251,610.62 | 528,628.27 | (277,017.65) |

JULY ATTACHMENTS

2.4.3 FAPT/Utilization Review

The City of Winchester conducts the Utilization Review process at the time of presentation to the FAPT, FTM, or IDT. Cases funded by CSA shall be reviewed regularly (see Section 2.4.1i-k hereto) to make sure that the right service is being provided, that the service is effective, and that the costs are reasonable and necessary. The frequency of review dates for all cases is as follows:

- a. Children in Residential Treatment Facilities (except children placed through their IEP) are to be reviewed a minimum of every 3 months.
- b. Children in Group Homes are to be reviewed a minimum of every 3 months.
- c. Children in Therapeutic Foster Care homes are to be reviewed a minimum of every 3 months.
- d. Children in Therapeutic Foster Care with a permanent foster care agreement shall be reviewed annually.
- e. Children/families receiving Prevention Services will be reviewed a minimum of every 3 months.
- f. Children in Regular/Therapeutic Foster Care Homes, Group Home Care, or Residential Treatment Facilities receiving CSA-funded services in addition to boarding care payments will be reviewed a minimum of every 3 months.
- g. Children in Regular Foster Care Homes receiving boarding care maintenance only will be reviewed annually unless otherwise requested by FAPT or CPMT.
- h. Children in placement based on an Individualized Educational Plan (IEP) will be reviewed annually unless the IEP changes.
- i. Children who are being stepped down to a Less Restrictive environment or moved to a new placement will be reviewed prior to that move.
- j. Children who are moved on an Emergency Basis will be reviewed at the next available FAPT meeting.

The CSA Coordinator shall complete the Utilization Review in conjunction with the FAPT Review. The CSA Coordinator will formally assess the necessity, efficiency and appropriateness of the services and treatment plan for an individual, consulting with the Case Manager, if needed. Any findings/recommendations will be documented in the CSA case file using the CSA Documentation Inventory Form, and will be presented to CPMT. The lead worker shall be notified if any action is required.



Case Name/Number:

Date:

CSA Documentation Inventory

| Required Information | Location | N/A - Notes |
|---|----------|-------------|
| Case Manager designation | | |
| Parent consent to release information | | |
| Assessment data | | |
| Includes: Completed CANS | | |
| Parental co-payment assessed | | |
| Service Plan IFSP FC Plan IEP (circle) | | |
| Desired outcomes & timeframes | | |
| Identification of services | | |
| Recommended level of need | | |
| Mitigating circumstances | | |
| FAPT or MDT recommendations | | |
| Parent/Guardian participation & consent to service plan | | |
| CPMT authorization | | |
| Signed vendor contract | | |
| Vendor treatment plan (s) | | |
| Vendor progress report (s) | | |



COMMONWEALTH of VIRGINIA

Scott Reiner, M.S.
Interim Executive Director

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

Administrative Memo #15-05

To: CPMT Chairs
FAPT Chairs
CSA Coordinators
CSA Fiscal Agents
SLAT Members

From: Scott Reiner, Interim Executive Director

Date: July 1, 2015

Subject: Release of Revised CSA Policy Manual and New CSA User Guide

The Office of Children's Services is pleased to announce the release of a revised CSA Policy Manual and a new CSA User Guide. The two documents take the place of the CSA Policy Manual that was available through the CSA website. The Policy Manual does not include any new material, but now contains only items with specific statutory authority or officially adopted as policy by the State Executive Council. The CSA User Guide contains significant information previously found in different locations, including in the retired Policy Manual and the CSA website.

The new documents can be found on the CSA website as follows:

<http://www.csa.virginia.gov/PDF/CSAPolicyManual2015revision.pdf>

CSA Policy Manual: CSA User Guide:

<http://www.csa.virginia.gov/PDF/CSAUserGuideFinalJuly%202015.pdf>

We hope you will find these documents easy to use and an improvement over previously available resources. We look forward to your feedback.