

Memorandum

TO: Directors of Developmental Services and Children's Mental Health Services
Designated and Specialized Service Agencies

FR: Amy Roth, Children's Services Coordinator, DAIL
Laurel Omland, Operations Chief, Child, Adolescent & Family Unit, DMH

CC: Bill Kelly, DAIL; Heidi Hall, DMH

DT: November 7, 2023

RE: Required Process for Local Agencies to Request Waiver Services with Shared
MH/DS Funding

This memo clarifies the current process for local developmental and mental health providers to submit proposals for shared MH/DS waiver funded services for children with co-occurring mental health and developmental disabilities. We recognize that Integrated Family Services is in the midst of conversations about simplifying funding mechanisms for children's services across the Agency of Human Services; however, this is the current procedure while those discussions are in process.

To ensure that the departments within the Agency of Human Services (DMH & DAIL) have the information required to commit funds between the departments, the local developmental and mental health providers shall collaborate on the creation of: 1) the plan of services, 2) the budget for funding proposal, and 3) agreement on commitment of the shared funds. The steps in the process for initial proposals and annual reviews are outlined below.

Local DS and MH program staffs are encouraged and welcome to seek technical assistance from their respective children's contacts at DAIL or DMH at any time during this process.

Initial Proposals for Shared MH/DS Waiver Services

Step One: the local Developmental Services (DS) program shall collaborate with the local Mental Health (MH) program to review the rationale for the shared funding proposal and shall agree on the following:

- Plan of **Services:** focus, type & frequency. MH services to be provided by MH provider and Developmental services by DS provider.
- Budget: **agreement** with commitment of MH waiver dollars towards MH services on DS waiver.

Step Two: Submit the following to the children's contacts at DMH (Laurel Omland) and DAIL (Amy Roth):

- Equity **proposal** including Plan of Services, Narrative Description & Budget
- Signature of MH Children's Director (or designee) indicating agreement with plan and funding (approval to transfer MH waiver funds from their local allocation to the DS waiver).

Step Three - DMH and DAIL children's contacts review the proposal and the local DS program submits the proposal to the DS Equity Funding Committee for review. If approved by the Committee, the transfer of funds will occur at the State level following Equity determination and submission of the items listed above.

Step Four – During the fiscal year, the DS or MH Director shall notify the DAIL DS Children's Coordinator (Amy) and DMH Operations Director (Laurel) in writing if there are reductions or termination of a shared waiver during the fiscal year.

Annual Review of Shared MH/DS Waiver Services

Waivers shall be reviewed by June 30 each year if agencies plan to continue the services into the next state fiscal year (FY). Continuation of shared waivers is not automatic; local DS and MH directors must agree and shall communicate with the state children's contacts, as indicated below.

Step One: Submit the following documents to the children's contacts at DMH and DAIL:

- Explanation of any changes in Plan of Services & Budget from prior year related to the service focus, type, and frequency of services for the current functioning and needs of child/youth
- Signature of MH Children's Director indicating agreement with plan and funding to continue into the next fiscal year (approval to transfer MH waiver funds from their local allocation to the DS waiver).

Step Two: The State will transfer funds to continue shared waiver services for the next fiscal year following submission by the local team to the State DMH and DAIL children's contacts of the documents listed above.

Step Three - The DS or MH Director shall notify the DAIL DS Children's Coordinator (Amy) and DMH Operations Director (Laurel) in writing if there are reductions or termination of a shared waiver during the fiscal year.