



An Overview of The Budget Process

Chaundrika Baldwin, MSA
SD-FMS Coordinator
05/2021

Purpose

Understanding the components needed to develop a cohesive budget that is reflective of the supports, services, and goals outlined in the Independent Plan of Service (IPOS)





- The CRSP (Support Coordinator) educates the Member/Legal Rep/Support Circle about Self-Directing
- DWIHN drafts the budget worksheet and assigns original signers
 - Oversight, support, & training
 - The CRSP (SC) obtains the Member's signature, uploads Budget into MHWIN



Understanding the Budget

- The Budget is developed during the Person-Centered Planning process.
- The Budget must be *flexible*...it is not a predetermined amount
 - Flexibility means the member may adjust the DWIHN-authorized funds to accomplish their IPOS.
 - This could include moving funds between budgetary lines to accomplish the individual's IPOS.
- **NOTE:** A change in the support/service needs could also mean a change in the budget

Developing the Budget

Once the member has decided to direct some or all their services, DWIHN will initiate the budget development.

- The process is:
 - Used to educate each individual prior to engaging in the budget development.
 - Transparent
 - Developed at least annually
or when changes are needed





Costs included in the overall budget

The member will decide what will be included in the final budget, within the overall cost parameters determined by DWIHN

Possible costs include:

- Self-directed services
 - Community living supports (CLS)
 - Respite
- Overnight health and safety supports
- Required Trainings
- Mileage
- Paid time off
- Rate of pay

THE BUDGET WORKSHEET

Log into MHWIN

<https://w3.pcesecure.com/cgi-bin/WebObjects/DWCAdmin>

Once you have logged into MHWIN, Click on the notification on your screen indicating “You Have Documents to Sign”

All unsigned documents will populate on the screen.



You have documents to sign

ADTs

Assessments

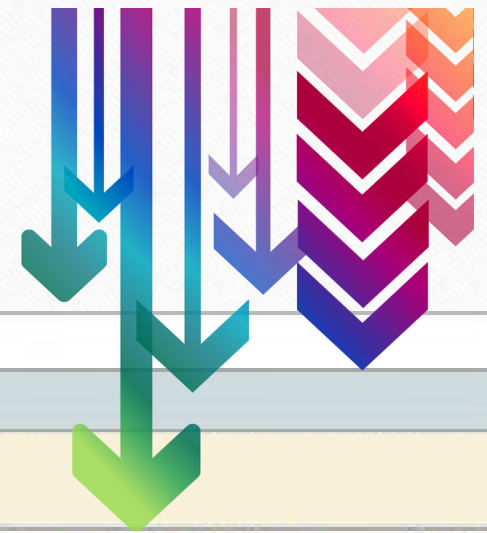
2 Unsigned Documents

Date	Type	Consumer	Signature Title	
04/14/2021	IPOS Addendum		Staff	Review and Sign Consumer Chart View Document Print
02/29/2020	Budget Worksheet		Clinically Responsible Service Provider	Review and Sign Consumer Chart View Document Print

THE BUDGET WORKSHEET

There could be several unsigned documents in the queue listed by:

- Date ~ date document was created
 - Type ~ the type of document
 - Consumer ~ Member's ID and Name
 - Signature Title ~ Required signer/creator
 - Untitled ~ lists the user's options for the type of document listed
- Locate the Budget Worksheet under the "Type" header
 - Select to "Review and Sign" the one listed as the "Budget Worksheet"



2 Unsigned Documents

Date	Type	Consumer	Signature Title	
04/14/2021	IPOS Addendum		Staff	
02/29/2020	Budget Worksheet		Clinically Responsible Service Provider	Review and Sign Consumer Chart View Document Print

Take notice:



SELF-DETERMINATION	
	Current Assignments
DWIHN CMH	Eff: 07/01/2019
Designation:	SMI + DD Primary: DD
BH CRSP:	Community Living Services
SUD CRSP:	NOT ASSIGNED
	Current LOC
No Completed LOCUS on file	

- Every member who Self-Directs their services, must have:
 - A viewable Self-Determination banner
 - If not, please send an email notification to Self-Determination@dwihn.org
 - The Clinically Responsible Service Provider (CRSP)
 - If incorrect or missing, contact the DWHIN's Access Center at: Accesscenter@dwihn.org

Understanding the Index

Index
1. Basic Info
2. Self-Directed Services
3. Total Supports
4. Signatures

- 1. Basic Info: displays the budget worksheet's basic information**
Budget Dates, PCP Dates, Type of staffing supports,
Fiscal Intermediary/Financial Management Service Agency(FMS)
Home Help dollars, Narrative (text field used for additional information)
- 2. Self-Directed Services: Lists the flexible dollars authorized for services/supports**
Description of Services, Effective Dates, Units Authorized, Rates, and Authorized amounts

3. Total Supports: Summarizes the Total Supports Dollars

Displays total amount of Personal Care Services (Home Help), Total SD Services Expenses, Total Supports/Gross Expenses (SD Services Expenses – Net Home Help)

4. Signatures –Requires 4 signatures to complete the Budget Worksheet

SD Coordinator (DWIHN Staff) ~ SD Program Admin (DWIHN Staff)
CRSP Representative ~ Digital Signature to Be Obtained by (typically the SC)
To be Signed by (Legal Rep or Ind)



Budget Worksheet

Index 1, Basic Info:

- The dates for the budget are taken from the most current PCP (IPOS) dates unless otherwise indicated
- The type of staffing supports should be indicated by checking at least one of the options **(1)**
- The Fiscal Intermediary (FMS) is listed here
- Any member receiving hands on assistance to perform personal care (Home Help), the amount would be entered here. CLS services may not supplant services otherwise available to the member.
 - Home Help award/denials/updated letters must be uploaded into MHWIN by the Support Coordinator.
 - This field cannot be left blank.
- The narrative field is left blank unless there is some pertinent information that needs to be shared. **(2)**

1. Budget Worksheet: Basic Info

Budget Date 3/1/2021 **Expiration Date** 02/28/2022
364 Days (from today)

PCP
IPOS Eff: 03/01/2021 Exp: 2/28/2022

Fiscal Intermediary lookup clear
29729 Personal Accounting Services-Site

Address
20500 Eureka Road, Suite 112

City Taylor **State** MI **Zip** 48180-5343

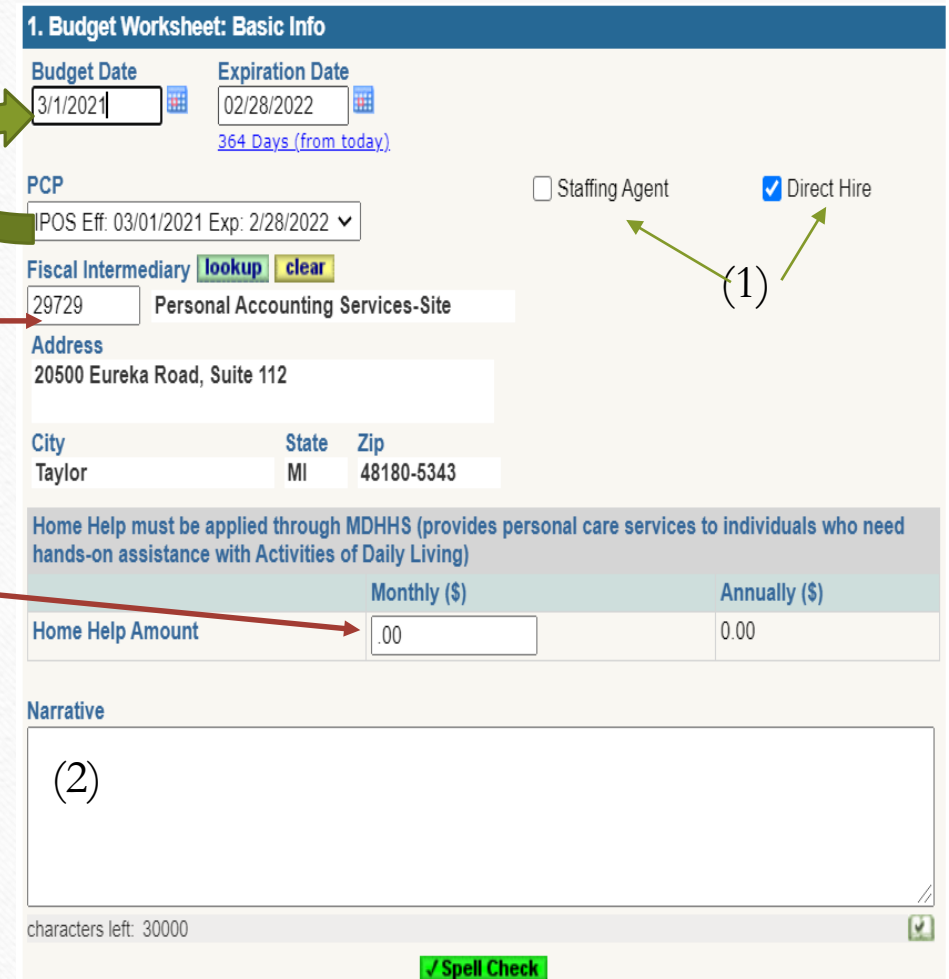
Home Help must be applied through MDHHS (provides personal care services to individuals who need hands-on assistance with Activities of Daily Living)

	Monthly (\$)	Annually (\$)
Home Help Amount	.00	0.00

Narrative
(2)

characters left: 30000

✓ Spell Check



The Budget Worksheet

Index 2, the SD Services section:

It is imperative to review the authorizations closely for accuracy:

- The Authorized Amounts shown in the budget are pulled from the authorizations approved in the IPOS.
 - The services authorized, the effective dates, units, rates, and authorized costs of the services are a direct reflection of what the CRSP has authorized.
- If the services authorized appear to be incorrect, go back to the authorizations in the IPOS for review and/or correction prior to budget completion.



verify

2. Budget Worksheet: Self-Directed Services				
Description of Service	Effective Dates	Units Authorized	Rate	Authorized Amount
H2015 Comprehensive Community Support Services	01/14/2021 - 12/31/2021	3018 (15 Minutes)	4.64	14003.52
T1005 Respite	01/01/2021 - 12/31/2021	1344 (Up to 15 Minutes)	4.07	5470.08
			Total	19473.60

The Budget Worksheet

- Index 3, Total supports:
 - This summation of the total gross expenses are tied to the services and supports authorized.
 - If there are any errors identified, a follow-up must occur with the SD Coordinator prior to budget completion

3. Budget Worksheet: Total Supports

Personal Care Services

Net Home Help	(=)\$	0.00
---------------	-------	------

Self-Directed Services

Total Self-Directed Services Expense	\$	0.00
--------------------------------------	----	------

Total Supports

Gross Expenses	\$	0.00
----------------	----	------



The Budget Worksheet

Index 4, Signature page:

- The system will not allow the “required” signers to move forward without signing (approving) the worksheet
- The SD Coordinator must assign:
 - The SD Program Administrator
 - The CRSP representative
 - The person responsible for obtaining the Member/Guardian’s signature at the time of signing

4. Budget Worksheet: Signatures

Electronic Signatures

SD Coordinator (DWIHN staff) Signature Required By

85772 Chaundrika Baldwin

SD Program Administrator (DWIHN staff) Signature Required By

Clinically Responsible Service Provider Signature Required By

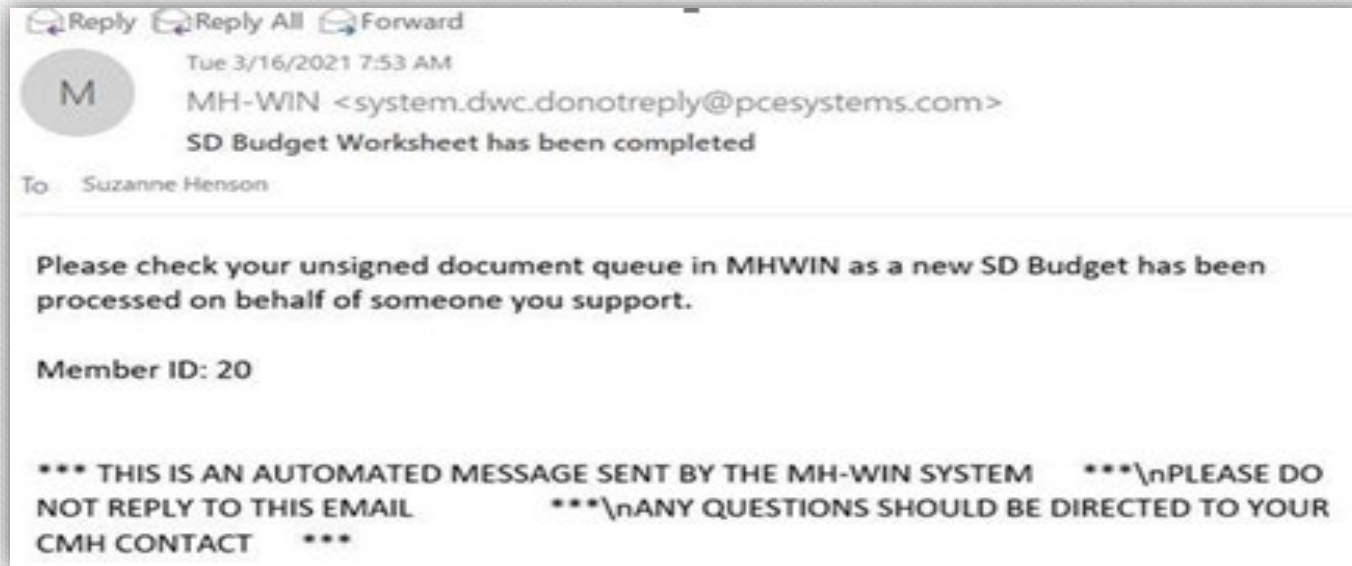
Digital Signature To Be Obtained By

To Be Signed By



SIGNING THE BUDGET

Once SD Coordinator has completed the budget and designated the signers, an email notification will be sent to the CRSP Representative. The CRSP has 30 days from the date of the email to sign and obtain the member's or guardian's signatures.



Signing the Budget....

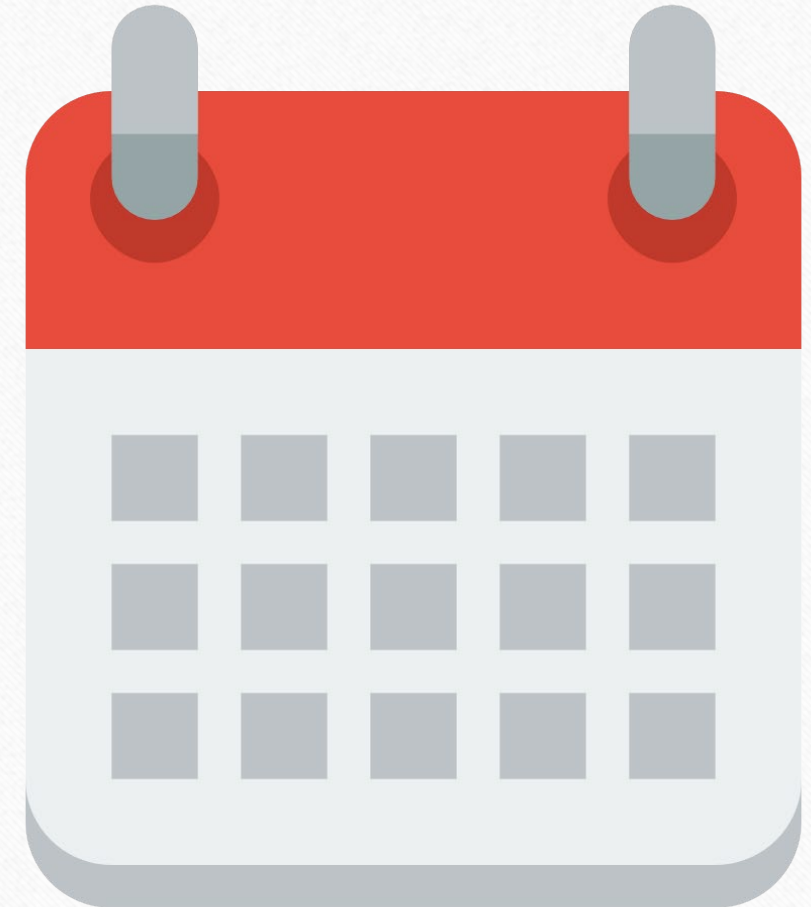
- The CRSP Representative will sign and allocate the SC responsible for obtaining the individual and/or guardian signature.
- The Electronic signature is completed by using the user's MHWIN password to sign.



SD Coordinator (DWIHN staff) Signature Signed By	Date Signed
85772 Chaundrika Baldwin MSA	04/14/2021 11:20:06 AM
SD Program Administrator (DWIHN staff) Signature Signed By	Date Signed
16723 Beverly Thompson LMSW, QIDP	04/14/2021 11:32:56 AM
Clinically Responsible Service Provider Signature Required By	Enter your password to sign
[REDACTED] LMSW QIDP	<input type="password"/> <input type="button" value="Sign and Save"/>
<input type="checkbox"/> Check here to obtain digital Consumer signature now	
Digital Signature To Be Obtained By <input type="button" value="lookup"/>	To Be Signed By
[REDACTED] LMSW QIDP	<input type="text" value="Consumer"/> ▼

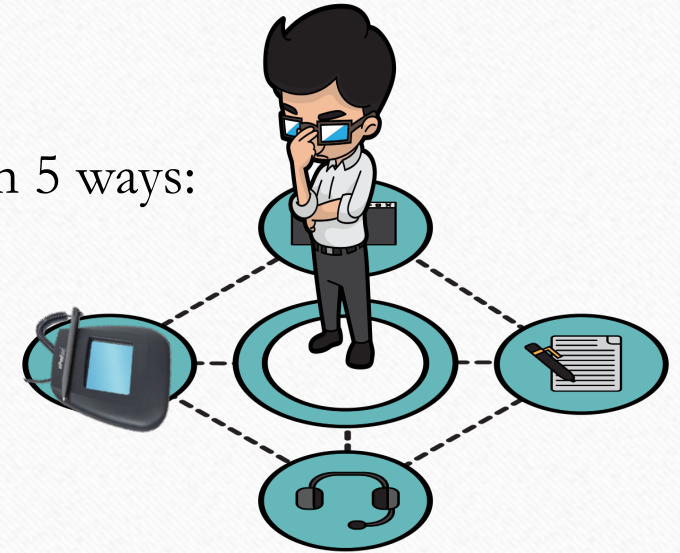
Signing the Budget....

- Once the CRSP Rep has signed, the budget will remain "parked" until the Consumer/Guardian has signed
- The SC has 30 days to obtain the individual/guardian signature from the date of the notification to the CRSP representative.
 - If not obtained within the allocated timeframe, DWHIN will allow another 14 days to comply with the request
 - Failure to get the signatures within that timeframe, will require further actions to be taken



Signing the Budget....

- The Consumer/Member/Guardian signature can be reflected in 5 ways:
 - Digitally ~using a signature pad
 - Refused to sign
 - Unable to sign
 - Obtained Externally (via paper signature)
 - Obtained by verbal Consent



Digital Signature [Capture](#) Refused To Sign Unable To Sign Obtained Externally Obtained by Verbal Consent

[Signature](#) [clear](#)

By signing the signature pad, I understand that I am electronically signing the document shown above. Your signature represents your acceptance and approval of the records.

Signature Type
Consumer
Parent/Guardian

Witness/Entered By
[Redacted]

Signature Name
Signature Status

Signing Digitally

Capturing the Digital Signature option allows the signer to use the screen or signature pad to capture the signature.

- It is saved to the document and uploaded
- Selecting one of the other four options opens dialog boxes that requires completion~ they change depending on the selection
- No matter what option, the signature type (signer) must **ALWAYS** be selected from the drop-down menu



Digital Signature [Capture](#) Refused To Sign Unable To Sign Obtained Externally Obtained by Verbal Consent

[Signature](#) [clear](#)

By signing the signature pad, I understand that I am electronically signing the document shown above. Your signature represents your acceptance and approval of the records.

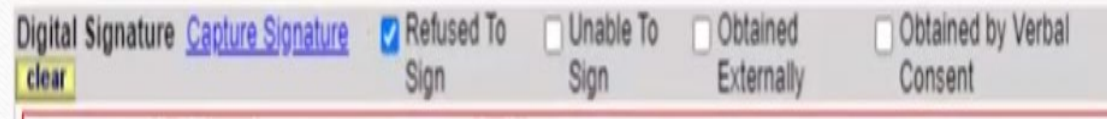
Signature Type
Consumer
Parent/Guardian
Signature Name

Witness/Entered By

Signature Status

Refused to Sign and Unable to Sign

Although very rare, there are times these options occur. While the reasons may be numerous.



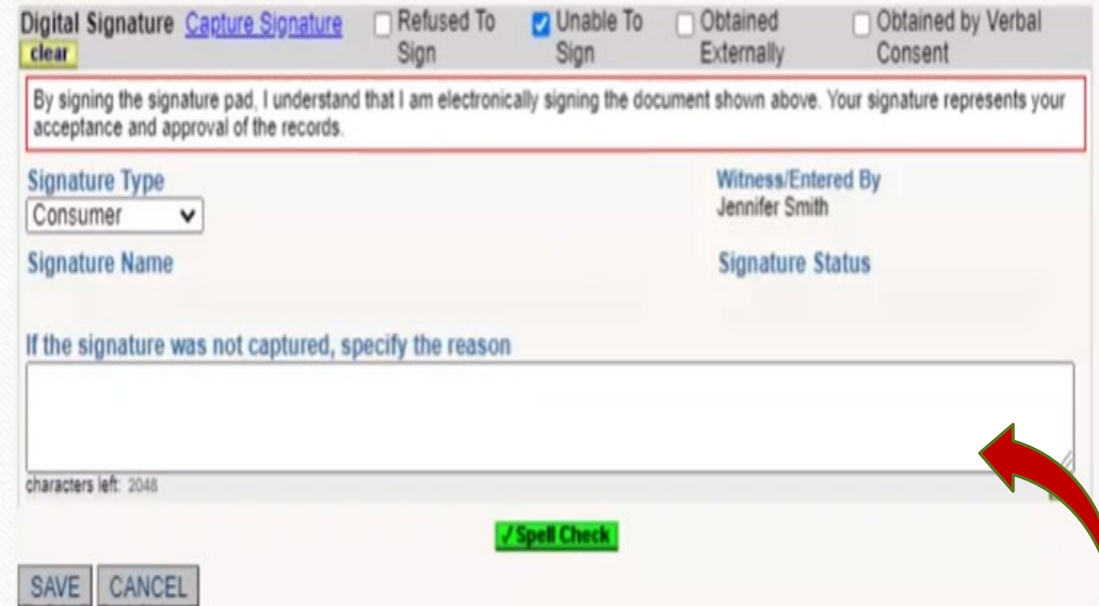
Digital Signature [Capture Signature](#) Refused To Sign Unable To Sign Obtained Externally Obtained by Verbal Consent

[clear](#)

A refusal is ultimately a denial of services.
No Budget=No Medicaid funded staffing supports

What needs to happen:

The SC will have to convene with the Member/Circle to provide more education, training, and the support needed to develop a budget that reflects their desired supports



Digital Signature [Capture Signature](#) Refused To Sign Unable To Sign Obtained Externally Obtained by Verbal Consent

[clear](#)

By signing the signature pad, I understand that I am electronically signing the document shown above. Your signature represents your acceptance and approval of the records.

Signature Type: Consumer
Witness/Entered By: Jennifer Smith

Signature Name: _____
Signature Status: _____

If the signature was not captured, specify the reason

characters left: 2048

[SAVE](#) [CANCEL](#) [✓ Spell Check](#)

What needs to happen:

Be sure to document it in the designated area.
The same information should be in the IPOS

Obtained Externally

(1)



Digital Signature [Capture](#) Refused To Sign Unable To Sign Obtained Externally Obtained by Verbal Consent
[Signature](#) [clear](#)

By signing the signature pad, I understand that I am electronically signing the document shown above. Your signature represents your acceptance and approval of the records.

Signature Type: **Consumer** (2) Parent/Guardian

External Signature Date: (3) [Use Current Date](#)

Witness/Entered By:


Signature Name: Signature Status:

1. Check the appropriate box
2. Using the drop-down menu, select the Signer under **Signature Type**
3. You may use the calendar, current date, or type in the date the signature is obtained

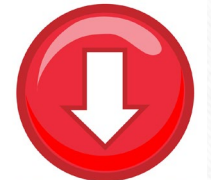
Be sure to **SAVE**

Obtained Externally

1. Print off the budget worksheet
2. Have the Member/Guardian sign, print, and date in the designated places
3. The External document will have to be uploaded into MHWIN once signed

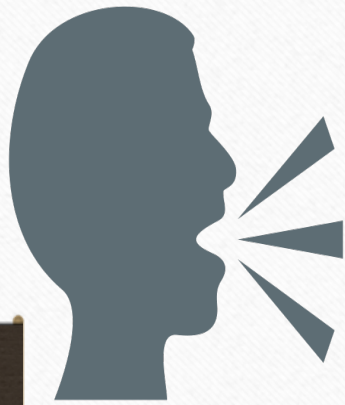
SIGNATURES		
Electronically Signed By: Chaundrika Baldwin MSA SD COORDINATOR (DWHN STAFF) SIGNATURE / CREDENTIALS	04/29/2021 DATE	
Electronically Signed By: Lucinda L. Brown LMSW SD PROGRAM ADMINISTRATOR (DWHN STAFF) SIGNATURE / CREDENTIALS	04/29/2021 DATE	
Electronically Signed By: Jennifer Smith LLMSW QIDP CLINICALLY RESPONSIBLE SERVICE PROVIDER SIGNATURE / CREDENTIALS	04/29/2021 DATE	
 CONSUMER SIGNATURE	John Hancock PRINTED NAME	4/30/2021 DATE

04/29/2021 Page 1 of 1



Obtained by Verbal Consent

(1)



Digital Signature [Capture](#) Refused To Sign Unable To Sign Obtained Externally Obtained by Verbal Consent
[Signature](#) [clear](#)

By signing the signature pad, I understand that I am electronically signing the document shown above. Your signature represents your acceptance and approval of the records.

Signature Type: Consumer (2)
Verbal Consent Date: [] (3) [Use Current Date](#)
Witness/Entered By: []

Verbal Consent Given by: [] (4)


[SAVE](#) [CANCEL](#)

1. Check the appropriate box
 2. Using the drop-down menu, select the Signer under **Signature Type**
 3. Type in the Date of Consent
 4. This choice adds a text box for entering the person's name who gave the consent
- **NOTE: Verbal Consents also require external signatures to be obtained****

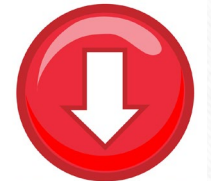


Obtained 1st Verbally... then Externally

1. Print off the budget worksheet
2. Have the Member/Guardian sign, print, and date in the designated places
3. The External document will have to be uploaded into MHWIN once signed

SIGNATURES		
Electronically Signed By: Chaundrika Baldwin MSA SD COORDINATOR (DWHN STAFF) SIGNATURE / CREDENTIALS	04/29/2021 DATE	
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Electronically Signed By: Jennifer Smith LLMSW QIDP CLINICALLY RESPONSIBLE SERVICE PROVIDER SIGNATURE / CREDENTIALS	04/29/2021 DATE	
 CONSUMER SIGNATURE	John Hancock PRINTED NAME	4/30/2021 DATE

04/29/2021 Page 1 of 1



Budget's are located in the Consumer Chart section of MHWIN

Demographics/Financial

[View Consumer Information](#)

[Change Consumer Information](#)

[Address History](#)

[Report of Death \(DWIHN Version\)](#)

[Death Report \(Historical\)](#)

[Insurance Policies / Funding Sources](#)

[Medicaid Deductible Policies](#)

[HAB Waiver Policies](#)

[Consumer Budget Worksheets](#)

[Print Face Sheet](#)



Depending on how the signature is obtained, the Consumer Chart will reflect the completion of the budget worksheet. **BE SURE** to give the Member/Individual/Guardian a copy of the completed budget with signatures



Date	Budget ID	Status	Add Budget Worksheet
12/14/2020	14883032	SIGNED BY: Chaundrika Baldwin Lucinda Brown [Redacted] OBTAINED EXTERNALLY: Parent/Guardian VERBALLY CONSENTED: Consumer	Change Signed Document View Print Document History



Summary

- Key Points to remember:
 - The annual budget is **FLEXIBLE**
 - Make sure all members who Self-Direct services have the SD banner on the top of the Screen
 - If not, please send an email notification to Self-Determination@dwihn.org
 - If there has been changes to the CRSP and it is not reflected on the Budget Worksheet, please contact the DWHIN's Access Center at: Accesscenter@dwihn.org
 - Verify the Amounts, Scopes, and Durations of services when authorizing them as they contribute to the costs of services being provided
 - Ensure the member/individual/Legal Rep receive a copy of the finalized budget worksheet with signatures
 - Questions regarding the budget worksheet should be directed to Self-Determination@dwihn.org
 - **Agencies will begin getting Budgets June 1st!**

**Lucinda
Brown**
LMSW

**Network Provider
Program Administrator
Self-Determination**

Email: lbrown@dwihn.org

**Beverly
Thompson**
LMSW/QIDP

**Clinical Specialist
Self-Determination**

**Email:
bthompson@dwihn.org**

**Chaundrika
Baldwin**
MSA

**SD-FMS
Coordinator**

**Email
CBaldwin@dwihn.org**

SELF-DETERMINATION TEAM

Detroit Wayne Integrated Health Network
707 W. Milwaukee Street
Detroit, MI 48202-2943

