

Appendix X to 2009 State and County Contract
for Social Services and Community Programs

Institution for Mental Diseases – OBRA/Special Relocation Funds

It is further understood and agreed by both parties through this attachment to the CY 2009 “State and County Contract Covering Social Services and Community Programs” that:

I. Funds Provided/Period Covered

Funds in the amount identified in this Contract are provided for the period January 1, 2009 through December 31, 2009.

The total value of the Contract may be further amended at any point in its duration. A memo of approval from the Division of Mental Health and Substance Abuse Services Administrator will constitute agreement that the Contract has been amended to the new value.

II. Purpose and Service Conditions on the use of the Additional Funds

A. These additional funds shall be used by the County to pay for the cost of community-based care and services provided to any person who has a mental illness and is 22 to 64 years of age at the time the person is relocated from an institution for mental diseases (IMD) or a Medicaid-certified nursing facility (NF) in accordance with the requirements of s. 46.268, Stats. The County shall provide a match of 9.89% of the cost of community service as required by s. 46.268(3), Stats.

B. These funds may be used for services that assist in the recovery process of the individual, and are not billable under Medical Assistance. Services may include:

1. Outreach
2. Referral
3. Screening
4. Screening Consultation
5. Community Support Program Service
6. Assessment and diagnosis
7. Case management
 - a. Ongoing assessment
 - b. Individual treatment plan
 - c. Monitoring
 - d. Advocacy
 - e. Service coordination
8. Crisis intervention services
9. Symptom management
 - a. Monitoring of clinical and symptom status
 - b. Supportive psychotherapy/education to client
 - c. Education, support, and consultation in symptom or illness management to client's family
10. Medication and medication monitoring

11. Supplementary psychiatric and psychological services
 12. Activities of daily living
 13. Employment-related services
 - a. Individual vocational supportive counseling
 - b. Work site development and client placement
 - c. Work-related active support
 - d. Job coaching
 14. Social and recreational skill training
 15. Additional services
 - a. Physical or dental health
 - b. Legal services
 - c. Transportation
 - d. Financial support and management
 - e. Housing
 16. Consumer Operated Services
- C. As a condition of receipt of these funds, the County agrees to demonstrate that the relocation determination of persons covered under this contract is based on an individual clinical patient assessment.
- D. The County shall be the Department's prime contract agent for the relocation effort. All conditions of this contract shall apply to all subcontracts entered into between the County and approved service providers.
- E. It is recognized by both the Department and the County that, based on the changing clinical needs of the client, the County may modify the service components in a client's community treatment plan. It is further understood that these treatment plan modifications are fully reimbursable within the constraints of the contract.
- F. Contracts for the provision of services to individuals funded under this contract, between the County and its provider agencies, require the approval of the appropriate Department Regional Office.
- G. If the person related to the community through these funds no longer requires services, another person who has a mental illness, is 22 to 64 years of age, and needs relocation from an IMD or a NF may be allocated with these funds for community based services.
- H. Failure to meet these purposes and conditions will result in the loss of these funds by the County and their repayment by the county to the Department.
- II. Fiscal Conditions on the Earning of the Additional Funds
- Counties shall submit to the Contract Administrator no later than June 30th of each year the information to complete the table below (HSRS 942 data but exclusive to the use of the IMD funds):

HSRS SPC	Unduplicated Numbers of Persons Served	Total Expenditures *
Supportive Home Care		
Community Living/Support Serv.		
Investigations and Assessments		
Community Support Services		
Work Related and Day Services		
Supported Employment		
Community Residential Services		
Community Treatment Services		
Inpatient and Institutional Care		
Other		
Total of Unduplicated Clients:		

* Counties that are unable to provide the amount of IMD funds used for these clients' services (because the funds have been co-mingled with BCA and county tax levy funds) are to notify the Contract Administrator at the beginning of each calendar of their inability to provide the data.

The Department shall apply these conditions in determining the close of this contract. The amount of any subsequent audit adjustment on the funds in this contract shall be based exclusively upon these conditions.

The total funds identified in this contract shall be considered as a fund against which the county may draw up to that maximum. These funds, however, shall be earned on a person-by-person basis.

The County specifically acknowledges and agrees that on or before March 1 of the following year, it will refund to the Department any funds received pursuant to this Contract that were unencumbered, unearned prior to January 1 of the following year.

IV. Fiscal and Client Reporting Conditions on the Use of the Additional Funds

These additional funds and the clients served by them must be reported to the Department on the DMT Form 600 (Profile #571) according to the schedule in the State/County Contract.

Failure to report these funds and the clients served by them as specified above will result in the loss of these funds by the County and their repayment by the County to the Department.

V. Payment Procedures

The Department shall pay these funds in accordance with the State and County Contract.