

Instructions

OCS Local Administrative Funding Plan

Beginning with FY2019, each locality's Administrative Plan are requested by an automated process. The Locality is able to request their Administrative Funds after October 1, of the new fiscal year.

This automated process involves four steps of which the first three are actions that shall be taken by the locality and the last step by the state. The locality steps are:

Step 1: CSA Coordinator enters data and submits the Administrative Plan.

Step 2: CPMT Chair approves the submitted Administrative Plan request.

Step 3: Fiscal Agent approves the submitted Administrative Plan request

Step 4: Processing for payment by the Department of Education

The Administrative Plan can be accessed, on CSA website's home page, under the Applications section.

- Click on the *Local Government Reporting* link, then
- Click on the *Click Here to Proceed* button. If the user has not yet configured their password in the system or has forgotten their password, they need to click on the *Reset/ Forgot Password* link that is under *Login* button and follow the instructions.

Step 1: CSA Coordinator

CSA Coordinator logs in to the CSA Local Government Reporting application.

The CSA Coordinator main screen looks as follows:

The screenshot displays the CSA Coordinator main screen. At the top left is the OCS logo (Office of Children's Services) and the Virginia.gov logo at the top right. A navigation menu includes Home, About, Parents & Families, Local Government, Resources, Statistics and Publications, and Contacts. The main content area is titled 'CSA Coordinator Section' and includes 'Return Home' and 'Logout' links. The 'OCS Submission' section contains three buttons: 'File Transfer' (with sub-options 'IACCT Private Day Rate' and 'Other File Upload'), 'OCS Admin Plan' (circled in red with an arrow pointing to the 'Initiate Admin Plan' button), and 'Other File Upload'. The 'Reports' section includes buttons for 'FY 19 SEFA Reporting', 'Administrative Plan', 'Transaction History', 'Pool Reimbursements History', 'Supplement Request History', and 'LEDRS Upload Details'. The 'Export Medicaid File' section has 'Select Year', 'Select Month', and 'Download File' buttons.

When the CSA Coordinator clicks on the *Initiate Admin Plan* button, the screen/form displayed is as follows:

OFFICE OF CHILDREN'S SERVICES
ADMINISTRATIVE BUDGET PLAN
FY 2019

DATE:	10/10/2018
LOCALITY:	
CONTACT PERSON:	
TELEPHONE:	

EXPENSE TYPE	AMOUNT
PERSONNEL	\$0
NON-PERSONNEL	\$0
EQUIPMENT	\$0
INITIAL STATE SHARE	\$12,263.00
ADD'L STATE SHARE	\$0.00
TOTAL STATE SHARE	\$12,263.00
TOTAL LOCAL SHARE	\$3,713.00
TOTAL ADMINISTRATIVE ALLOCATION	\$15,976.00

This budget plan is for the total allocation for the locality (s) indicated above. We understand that the Department of Education as fiscal agent of the State Executive Council will make payment of the state's share of this budget allocation according to our locality (s) match rate for pool funds under the Children's Services Act. Further, we certify that all expenditures from this allocation will be in accordance with the requirements for the use of such funds as set forth in the State Pool Funds section of the CSA Operations Manual.

CPMT CHAIR	
DATE CPMT CHAIR APPROVED	
FISCAL AGENT	
DATE FISCAL AGENT APPROVED	
DOE	
DATE DOE APPROVED	

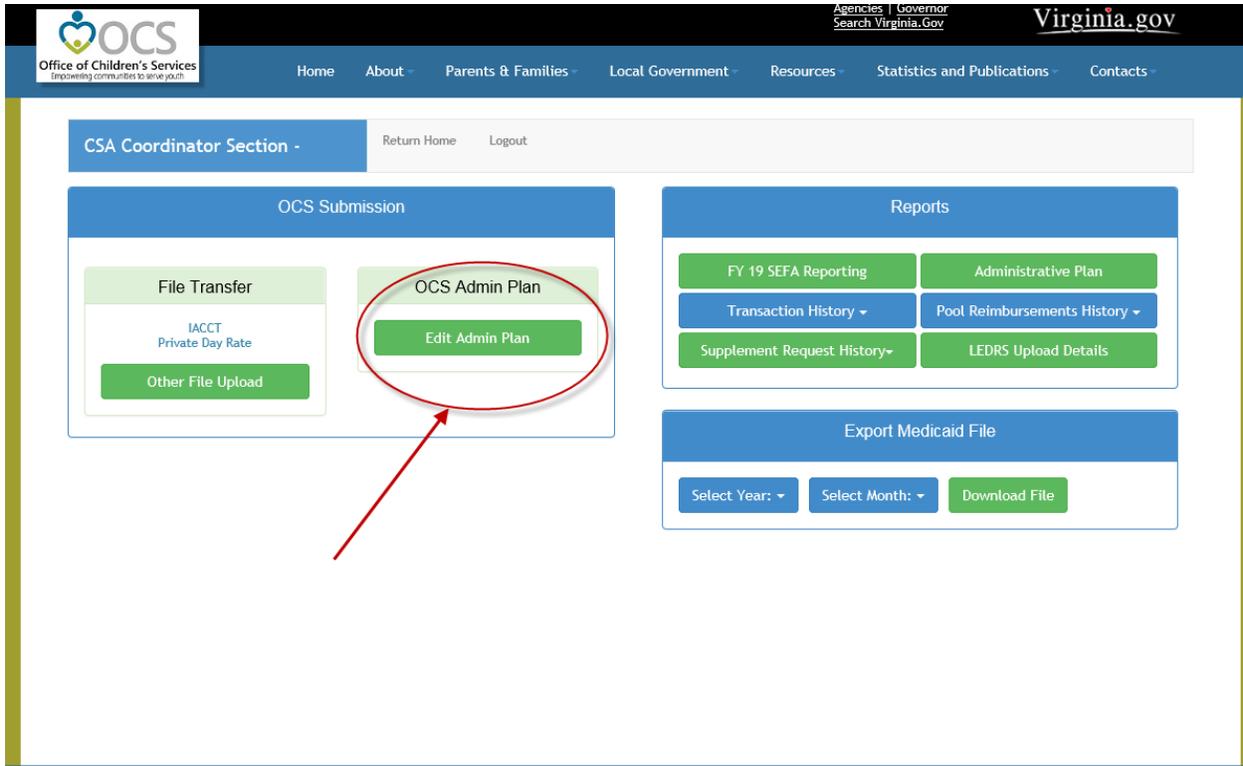
Pending Submit

The allocated state and local share (including the total) are pre-populated for the user.

After entering the Personnel, Non-Personnel and Equipment information the user can click on either *Pending* Button or *Submit* Button.

Note: All screens containing a form have an option to "Print the Admin Plan," by clicking on the *Print Admin Plan* button on the top bar.

When the *Pending* Button is clicked, the information entered is saved to a database the information can be accessed later by clicking on the *Edit Admin Plan* button.



Once the CSA Coordinator has finalized the Admin Plan data entry, they need to click on *Submit* button. The Admin Plan data is stored in the database and the CPMT Chair for the locality is notified via e-mail of the availability of the Admin Plan for approval.

Step 2: CPMT Chair

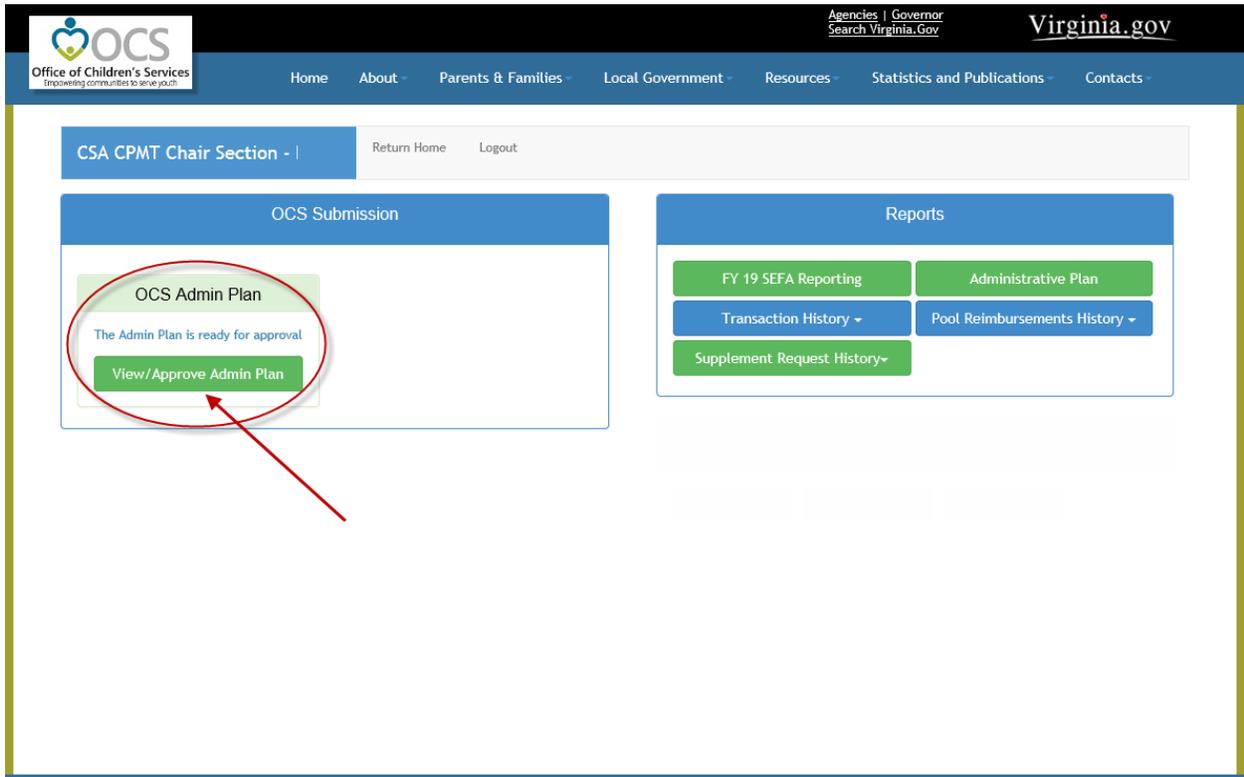
When CPMT Chair logs in to the CSA Local Government Reporting application. if the CSA Coordinator has initiated, but not Submitted the Admin Plan, the main screen looks as follows:

The screenshot displays the main interface of the CSA Local Government Reporting application. At the top, there is a navigation bar with the OCS logo (Office of Children's Services) on the left and the Virginia.gov logo on the right. The navigation menu includes links for Home, About, Parents & Families, Local Government, Resources, Statistics and Publications, and Contacts. Below the navigation bar, the page title is "CSA CPMT Chair Section -" with "Return Home" and "Logout" links. The main content area is divided into two primary sections: "OCS Submission" and "Reports".

The "OCS Submission" section features a card titled "OCS Admin Plan" with the following text: "The Admin Plan is in the approval process. For current status, click the 'Administrative Plan' button in the Reports Section".

The "Reports" section contains five buttons: "FY 19 SEFA Reporting", "Administrative Plan", "Transaction History", "Pool Reimbursements History", and "Supplement Request History".

After the CSA Coordinator approves the Admin Plan, the screen of the CPMT Chair looks as follows:



When the CPMT Chair clicks on *View/Approve Admin Plan* Button, the following screen/form is displayed.

OFFICE OF CHILDREN'S SERVICES
ADMINISTRATIVE BUDGET PLAN
FY 2019

DATE:	10/10/2018
LOCALITY/CPMT:	
CONTACT PERSON:	
TELEPHONE:	

EXPENSE TYPE	AMOUNT
PERSONNEL	\$12,200.00
NON-PERSONNEL	\$3,713.00
EQUIPMENT	\$63.00
INITIAL STATE SHARE	\$12,263.00
ADD'L STATE SHARE	\$0.00
TOTAL STATE SHARE	\$12,263.00
TOTAL LOCAL SHARE	\$3,713.00
TOTAL ADMINISTRATIVE ALLOCATION	\$15,976.00

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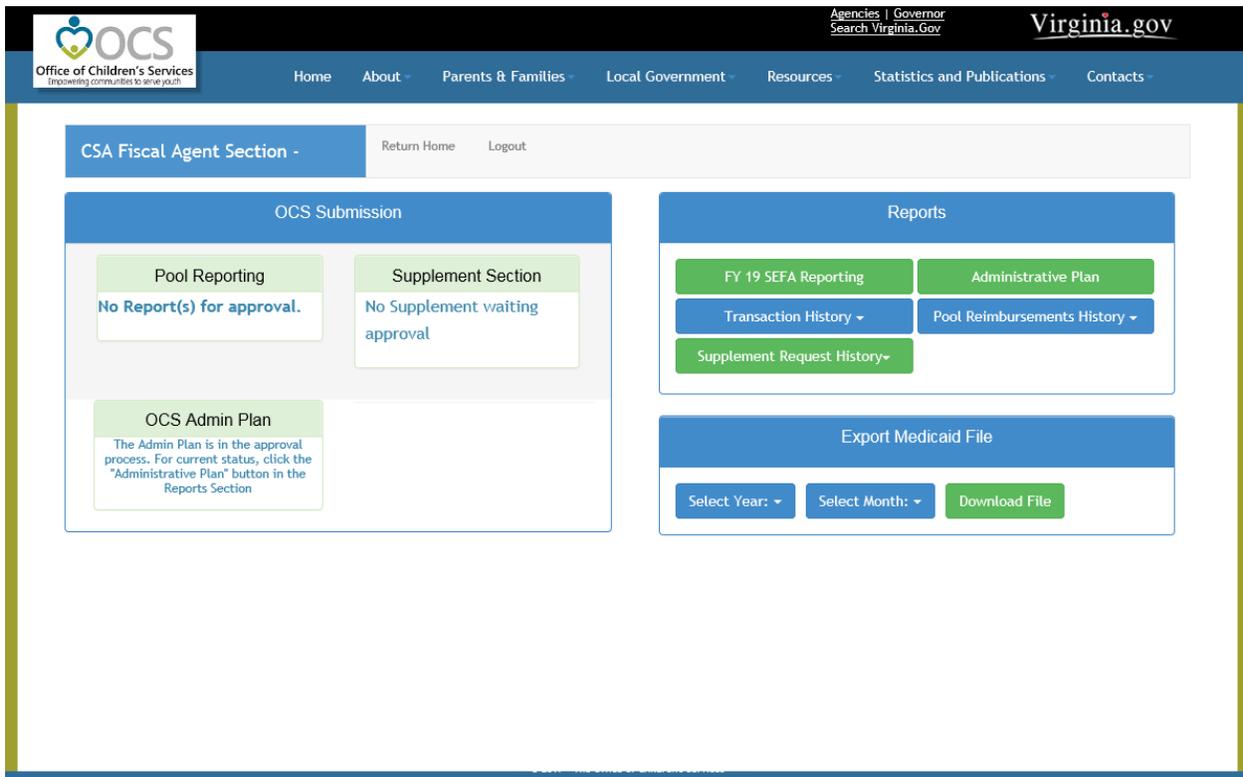
CPMT CHAIR	
DATE CPMT CHAIR APPROVED	
FISCAL AGENT	
DATE FISCAL AGENT APPROVED	
DOE	
DATE DOE APPROVED	

When the *Approve* button is clicked, the database saves the CPMT Chair's approval details and an e-mail notification is sent to the Fiscal Agent. The CPMT Chair also has an option to "Print the Admin Plan" by clicking on the *Print Admin Plan* button on the top bar.

The CPMT Chair can take no action if he/she is not ready to approve the Admin Plan.

Step 3: Fiscal Agent

When Fiscal Agent logs in to the CSA Local Government Reporting application, the Fiscal Agent's main screen looks as follows if the Admin Plan is initiated by the CSA Coordinator, but not yet approved by the CPMT Chair:



After the CPMT Chair approves the Admin Plan, the screen for the Fiscal Agent looks as follows:

The screenshot displays the 'CSA Fiscal Agent Section' interface. At the top, there is a navigation bar with the OCS logo (Office of Children's Services) on the left and 'Virginia.gov' on the right. The main content area is divided into two columns. The left column, titled 'OCS Submission', contains three sections: 'Pool Reporting' with the status 'No Report(s) for approval.', 'Supplement Section' with 'No Supplement waiting approval', and 'OCS Admin Plan' with the status 'The Admin Plan is ready for approval' and a green button labeled 'View/Approve Admin Plan'. The right column, titled 'Reports', contains a grid of buttons: 'FY 19 SEFA Reporting', 'Administrative Plan', 'Transaction History', 'Pool Reimbursements History', and 'Supplement Request History'. Below the reports is an 'Export Medicaid File' section with 'Select Year' and 'Select Month' dropdowns, and a 'Download File' button. Two red arrows point to the 'View/Approve Admin Plan' button and the 'Administrative Plan' button.

When the *View/Approve Admin Plan* button is clicked, the following screen/form is displayed:

OFFICE OF CHILDREN'S SERVICES
ADMINISTRATIVE BUDGET PLAN
FY 2019

DATE:	10/10/2018
LOCALITY/CPMT:	
CONTACT PERSON:	
TELEPHONE:	

EXPENSE TYPE	AMOUNT
PERSONNEL	\$12,200.00
NON-PERSONNEL	\$3,713.00
EQUIPMENT	\$63.00
INITIAL STATE SHARE	\$12,263.00
ADDL STATE SHARE	\$0.00
TOTAL STATE SHARE	\$12,263.00
TOTAL LOCAL SHARE	\$3,713.00
TOTAL ADMINISTRATIVE ALLOCATION	\$15,976.00

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CPMT CHAIR	Tracie Brewster
DATE CPMT CHAIR APPROVED	10/10/2018
FISCAL AGENT	
DATE FISCAL AGENT APPROVED	
DOE	
DATE DOE APPROVED	

When the *Approve* button is clicked, the database saves the Fiscal Agent's approval details. The Fiscal Agent also has an option to "Print the Admin Plan" by clicking on the *Print Admin Plan* button on the top bar.

The Fiscal Agent can take no action if he/she is not ready to approve the Admin Plan.

Step 4: State Processing

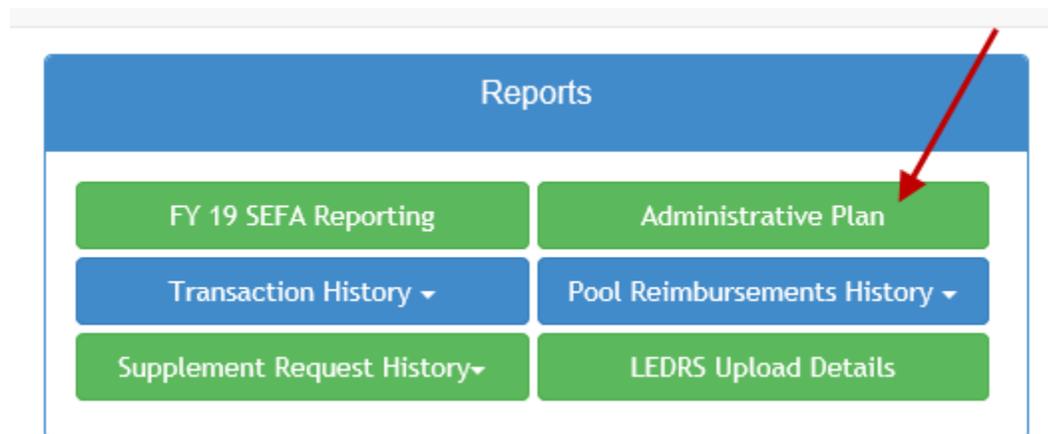
Once the Fiscal Agent submits the Admin Plan, the request is placed in a holding status for processing by the Virginia Department of Education, the CSA Fiscal Agent.

DOE will process the submitted plans each month and payment made to the locality by EDI and identified as Administrative Funds.

Once the Admin Plan payment has been made, the buttons allowing edit/view/approve for the Admin Plan will disappear from the OCS Submission section for the current year.

Tracking the Progress/Status of Your Admin Plan Submission

The progress and status of the submitted Admin Plan can be viewed by clicking on the *Administrative Plan* button on the right (Reports) section of the screen.



For assistance, please contact the OCS Business Manager at: maris.adcock@csa.virginia.gov.