

Budget Allocations in Minerva

Substance Use Disorder Prevention and
Mental Health Promotion Online Reporting System (Minerva)
Training Series for CPWI and Community-Based Organizations

Presented by DBHR Staff

To access the Minerva Knowledge Base, visit
www.theAthenaForum.org/Minerva.

Questions? Contact PrevMIS@dshs.wa.gov.

Resources about Minerva

Athena

<http://theAthenaForum.org/>

Athena/Minerva page

<http://theAthenaForum.org/Minerva>

Resources include:

Minerva Knowledge Base

TA Call Schedule

FAQ's

PrevMIS@dshs.wa.gov

About this training

- While Minerva is not an accounting software, we use Minerva to track Funding Sources, Budget Allocations, and Program Budgets.
- This Training describes each of these components.

Funding Sources

- There are multiple Funding Sources in WA State's SUD Prevention and MH Promotion System:

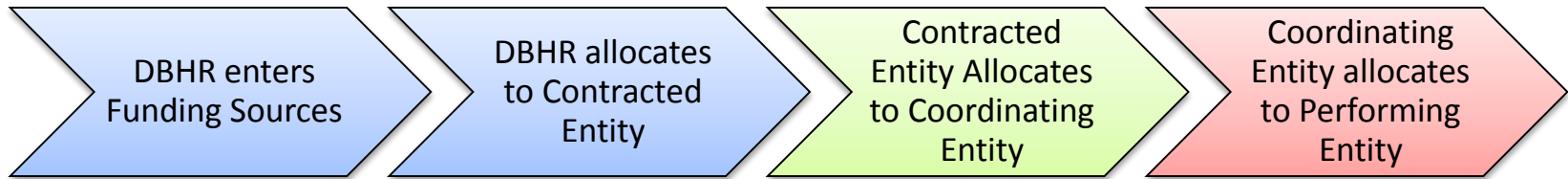
Funding Sources

- There are multiple Funding Sources in WA State's SUD Prevention and MH Promotion System:
 - Dedicated Marijuana Account (State)
 - General fund (State)
 - Mental Health Promotion Projects (State)
 - Partnerships for Success Grant (Federal)
 - State Targeted Response to the Opioid Crisis (Federal)
 - Substance Abuse Block Grant (Federal)

Funding Sources

- Prevention contractors may be funded through one or more of these Funding Sources.
- Each Funding Source has rules regarding how the Funds may be spent – these are referenced in DSHS' contracts.

Budget Allocations: 4 Steps



Budget Allocations: Step 1 of 4



- First, **DBHR Prevention Staff** enter Funding Sources in Minerva.
 - Funding Sources are either Administrative or Program, have a Start Date and End Date, and an amount.

Budget Allocations: Step 2 of 4



- Second, **DBHR** adds a Budget Allocation for each **Contracted Entity**.

Budget Allocations: Step 2 of 4



- Second, **DBHR** adds a Budget Allocation for each **Contracted Entity**.
 - A Contracted Entity is the organization that has a signed contract with DBHR.
 - DBHR adds Budget Allocations per A&R in the executed contract with DBHR.
 - Once Step 2 is complete, DBHR’s role with Budget Allocations is complete.

Budget Allocations: Step 3 of 4



- Third, each **Contracted Entity** adds a Budget Allocation for each **Coordinating Entity** associated with the Contracted Entity.
 - The Fiscal Agent or System User with permission to do so adds Budget Allocations.

Budget Allocations: Step 4 of 4



- Fourth, each **Coordinating Entity** adds a Budget Allocation for each **Performing Entity** associated with the **Coordinating Entity**.

Budget Allocations: Step 4 of 4



- Fourth, each **Coordinating Entity** adds a Budget Allocation for each **Performing Entity** associated with the **Coordinating Entity**.
 - Staff with the Coordinating Entity (i.e. Coalition Coordinator or Tribal Prevention Staff) adds Budget Allocations as planned for in their budget for each Performing Entity associated with the Coordinating Entity.

Budget Allocations: Example 1

DBHR

Contracted Entity
(County, CBO, ESD, or Tribe)

Coordinating Entity
(CBO, CPWI Coalition, or
Tribe Px Program)

Performing Entity
(CBO, CPWI Coalition, or
Tribe Px Program)

Three separate Budget Allocations:

- **DBHR** → **Contracted Entity**
- **Contracted Entity** → **Coordinating Entity**
- **Coordinating Entity** → **Performing Entity**

Budget Allocations: Example 2

DBHR

Contracted Entity
(County, CBO, ESD, or Tribe)

Coordinating Entity
(CBO, CPWI Coalition, or Tribe Px Program)

Four separate Budget Allocations:

- **DBHR** → **Contracted Entity**
- **Contracted Entity** → **Coordinating Entity**
- **Coordinating Entity** → **Performing Entity**
- **Coordinating Entity** → **Performing Entity**

Performing Entity
(CBO, CPWI Coalition, or Tribe Px Program)

Performing Entity
(Subcontractor)

Budget Allocations

Contracted Entity: Add Budget Allocation for one **Coordinating Entity** (Step 3 above)

– Click the **Budget Module**



– Then, click **Add New Funding Source Allocation**

\$ Add New Funding Source Allocation

Budget Allocations

- Choose a Contracted Entity and one Coordinating Entity, only.

Entity Selection

Contracted Entity - Select Contracted Entity -	Coordinating Entity - Select -	Performing Entity - Select -
---	-----------------------------------	---------------------------------


Budget Allocations

- Enter the Contract Number with (CE) and the Contract Start Date and Contract End Date


Contract Information

Contract Number (If there is no contract #, please enter NA) *

Contract Start Date *




Contract End Date *



Budget Allocations

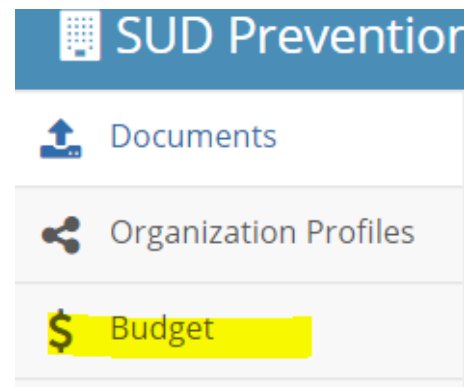
- Enter the budget amounts.
- SAVE to come back.
- COMPLETE to finish.

A blue rectangular button with a white floppy disk icon on the left and the text "Save" in white to its right.A green rectangular button with a white checkmark icon on the left and the text "Complete" in white to its right.A grey rectangular button with a white 'X' icon on the left and the text "Exit without Saving" in white to its right.

Budget Allocations

Coordinating Entity: Add a Budget Allocation for one Performing Entity (Step 4 above)

- Click the **Budget Module**



- Then, click **Add New Funding Source Allocation**

\$ Add New Funding Source Allocation

Budget Allocations

- Choose a Contracted Entity and one Coordinating Entity and one Performing Entity.

Entity Selection

Contracted Entity

- Select Contracted Entity -

Coordinating Entity

- Select -

Performing Entity

- Select -

Budget Allocations

- Enter the Contract Number with (PE) and the Contract Start Date and Contract End Date

Contract Information

Contract Number (If there is no contract #, please enter NA) *

1234-56789 (PE)

Contract Start Date *




Contract End Date *



Budget Allocations

- Enter the budget amounts.
- SAVE to come back.
- COMPLETE to finish.

 Save

 Complete

 Exit without Saving

Program Budgets

- When you create a new Program Planning Profile (or edit an existing one), you select a Tier 1, Tier 2, and Tier 3 combination plus a Start Date and End Date for the Program.

Program Budgets

- When you create a new Program Planning Profile (or edit an existing one), you select a Tier 1, Tier 2, and Tier 3 combination plus a Start Date and End Date for the Program.
- Only Funding Sources allocated to that that Tier 1, Tier 2, and Tier 3 combination for the Start Date and End Date selected are visible.

Program Budgets

- When you create a new Program Planning Profile (or edit an existing one), you select a Tier 1, Tier 2, and Tier 3 combination plus a Start Date and End Date for the Program.
- Only Funding Sources allocated to that that Tier 1, Tier 2, and Tier 3 combination for the Start Date and End Date selected are visible.
- If there are no Budget Allocations or a Budget Allocation does not include a Funding Source in your contract, it won't be an option in the Planning Profile.

Program Budgets

- Only Funding Sources that have been allocated to your Tier 1, Tier 2, Tier 3 (as selected for this Profile) that align with the date range of the program will be visible.

Program Budgets

- Otherwise, you will see this message:

A Budget Allocation may not have been entered into the system for your organization. First, ensure the program activity dates in questions 5 and 6 are entered correctly. If so and no funding sources are visible, you may add a Local Program Name and other information and SAVE your work. Then, check with your Contracting or Coordinating Entity to ensure all Budget Allocations are complete. Once Budget Allocations are complete, you may return to this saved Profile to enter budget amounts and other information as needed and SUBMIT this Profile.

Program Budgets

- Otherwise, you will see this message:

A Budget Allocation may not have been entered into the system for your organization. **First, ensure the program activity dates in questions 5 and 6 are entered correctly.** If so and no funding sources are visible, you may add a Local Program Name and other information and SAVE your work. Then, check with your Contracting or Coordinating Entity to ensure all Budget Allocations are complete. Once Budget Allocations are complete, you may return to this saved Profile to enter budget amounts and other information as needed and SUBMIT this Profile.

Program Budgets

- Otherwise, you will see this message:

A Budget Allocation may not have been entered into the system for your organization. First, ensure the program activity dates in questions 5 and 6 are entered correctly. **If so and no funding sources are visible, you may add a Local Program Name and other information and SAVE your work.** Then, check with your Contracting or Coordinating Entity to ensure all Budget Allocations are complete. Once Budget Allocations are complete, you may return to this saved Profile to enter budget amounts and other information as needed and SUBMIT this Profile.

Program Budgets

- Otherwise, you will see this message:

A Budget Allocation may not have been entered into the system for your organization. First, ensure the program activity dates in questions 5 and 6 are entered correctly. If so and no funding sources are visible, you may add a Local Program Name and other information and SAVE your work. **Then, check with your Contracting or Coordinating Entity to ensure all Budget Allocations are complete.** Once Budget Allocations are complete, you may return to this saved Profile to enter budget amounts and other information as needed and SUBMIT this Profile.

Program Budgets

- Otherwise, you will see this message:

A Budget Allocation may not have been entered into the system for your organization. First, ensure the program activity dates in questions 5 and 6 are entered correctly. If so and no funding sources are visible, you may add a Local Program Name and other information and SAVE your work. Then, check with your Contracting or Coordinating Entity to ensure all Budget Allocations are complete. **Once Budget Allocations are complete, you may return to this saved Profile to enter budget amounts and other information as needed and SUBMIT this Profile.**

Reporting Budgets: Detail

- Here is the entire message:

A Budget Allocation may not have been entered into the system for your organization. First, ensure the program activity dates in questions 5 and 6 are entered correctly. If so and no funding sources are visible, you may add a Local Program Name and other information and SAVE your work. Then, check with your Contracting or Coordinating Entity to ensure all Budget Allocations are complete. Once Budget Allocations are complete, you may return to this saved Profile to enter budget amounts and other information as needed and SUBMIT this Profile.

Program Budget

- If Budget Allocations are available, enter the appropriate budget amounts under Administrative and Program.
- SAVE or SUBMIT for review to DBHR when ready.