



Washington State Health Care Authority

Tracking Funding in Minerva

The information in this guide can also be found in
Section III: Tracking Funding With Minerva
in the Minerva User Guide, posted at:
www.TheAthenaForum.org/MinervaUserGuide.

Substance Use Disorder Prevention and
Mental Health Promotion Online Reporting System (Minerva)

www.TheAthenaForum.org/Minerva

www.TheAthenaForum.org/MKB

Date of update: April 25, 2019



Resources about Minerva

Athena

www.TheAthenaForum.org

Athena/Minerva page

www.TheAthenaForum.org/Minerva

Resources include:

Minerva Knowledge Base

TA Call Schedule

Tracking Funding with Minerva

- The Minerva system allows DBHR and prevention providers to identify and track funding sources.

Tracking Funding with Minerva

- For local, state, and federal reporting on prevention services accurate budget information for each program or strategy is used:

Tracking Funding with Minerva

- For local, state, and federal reporting on prevention services accurate budget information for each program or strategy is used:
 - To tell the prevention story by providing information on how funds support prevention services;
 - To help ensure that all funds are allocated and spent appropriately and as planned; and
 - As part of review of service data for contract management and billing.

Funding Sources

- Funding Sources in WA State's SUD Prevention and MH Promotion System in the 17-19 Biennium:

Funding Sources

- Funding Sources in WA State's SUD Prevention and MH Promotion System in the 17-19 Biennium:
 - 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)
 - State Opioid Response Grant (Federal)
 - Substance Abuse Block Grant (Federal)

Funding Sources

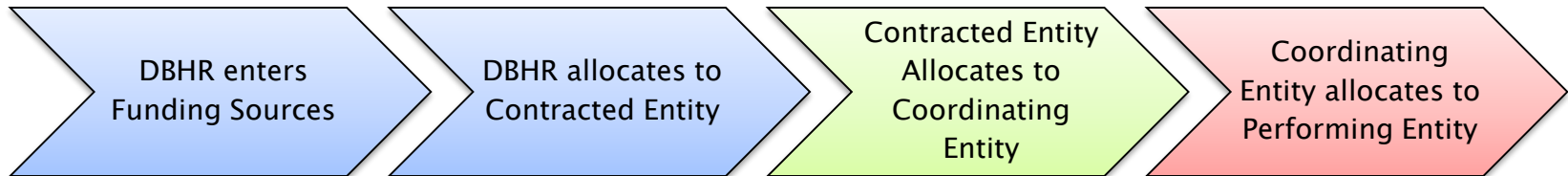
- Prevention contractors may be funded through one or more of these Funding Sources.
- Each Funding Source has rules regarding how the Funds may be spent – these are referenced in HCA's contracts.

Budget Allocations: 4 Steps

- There are four main steps to creating budget allocations in Minerva.
- **Budget allocations must be COMPLETE to allow system users to complete other actions in Minerva.**

Budget Allocations: 4 Steps

- The four steps are ...



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.
 - A Contracted Entity is the organization that has a signed contract with DBHR.
 - DBHR creates Budget Allocations following the 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.
 - Staff with the Coordinating Entity (i.e. Coalition Coordinator or Tribal Prevention Staff) creates 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)

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

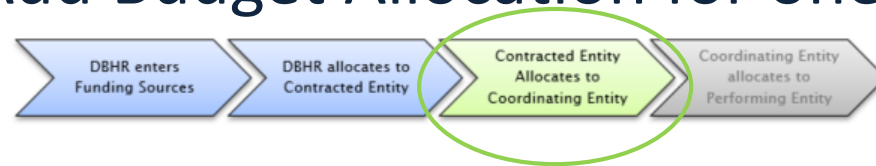
Performing Entity
(Subcontractor)

Four separate Budget Allocations:

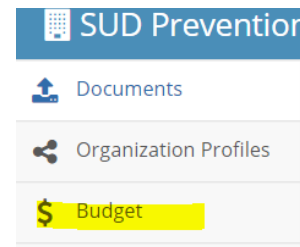
- DBHR → Contracted Entity
- Contracted Entity → Coordinating Entity
- Coordinating Entity → Performing Entity
- Coordinating Entity → Performing Entity

Budget Allocations

- Contracted Entity: Add Budget Allocation for one Coordinating Entity



- 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.

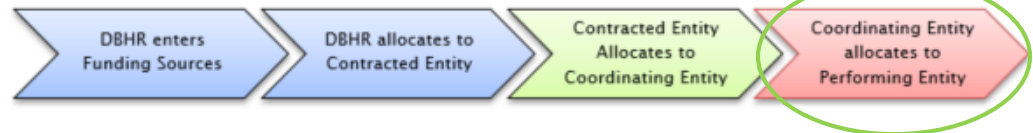
 Save

 Complete

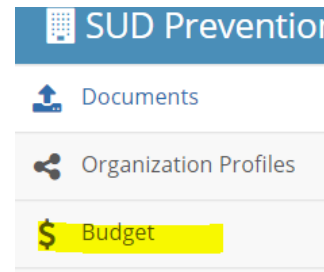
 Exit without Saving

Budget Allocations

- Coordinating Entity: Add a Budget Allocation for one Performing Entity



- 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) *

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

- 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

- 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.

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Program Budgets

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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.

Budget Allocations in Minerva

- The Minerva system allows DBHR and prevention providers to identify and track funding sources.
- The Minerva User Guide has more information on Budget allocations and other system features and is posted at:

www.TheAthenaForum.org/MinervaUserGuide