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**From:** [REDACTED]@vr.idaho.gov>  
**Sent:** Wednesday, March 20, 2013 3:54 PM  
**To:** Joni L. Ward  
**Subject:** RE: EES redux

No, I'll be at in the EF meeting from 8 to 4:30 tomorrow.. supposed to be at a luncheon on Friday in Meridian, but maybe that morning?

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**From:** Joni L. Ward [mailto:Joni.Ward@idjc.idaho.gov]  
**Sent:** Wednesday, March 20, 2013 3:49 PM  
**To:** [REDACTED]  
**Subject:** RE: EES redux

I sure hope so!!! Not looking very good for an afternoon walk for me...  
Tomorrow you are in Employment First all day... right? Any time around that? Or Friday?

**Joni Ward**  
Substance Use Disorder Program Specialist  
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[IDJC SUDS Website](#)

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**From:** [REDACTED]@vr.idaho.gov]  
**Sent:** Wednesday, March 20, 2013 3:43 PM  
**To:** Joni L. Ward  
**Subject:** RE: EES redux

See you soon????

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**From:** Joni L. Ward [mailto:Joni.Ward@idjc.idaho.gov]  
**Sent:** Wednesday, March 20, 2013 3:41 PM  
**To:** [REDACTED]  
**Subject:** RE: EES redux

Miss you too.

**Joni Ward**  
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**From:** [REDACTED]@vr.idaho.gov]  
**Sent:** Wednesday, March 20, 2013 3:40 PM

**To:** Joni L. Ward  
**Subject:** RE: EES redux

<sigh>  
Miss you...

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**From:** Joni L. Ward [<mailto:Joni.Ward@idjc.idaho.gov>]  
**Sent:** Wednesday, March 20, 2013 3:40 PM  
**To:** [REDACTED]  
**Subject:** RE: EES redux

Me too.

**Joni Ward**  
Substance Use Disorder Program Specialist  
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**From:** [REDACTED]@vr.idaho.gov]  
**Sent:** Wednesday, March 20, 2013 3:34 PM  
**To:** Joni L. Ward  
**Subject:** RE: EES redux

I like the sound of him knowing about you and I...

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**From:** Joni L. Ward [<mailto:Joni.Ward@idjc.idaho.gov>]  
**Sent:** Wednesday, March 20, 2013 3:03 PM  
**To:** [REDACTED]  
**Subject:** RE: EES redux

Hmm...yes, good point about the information... I was more just speaking of if he knew about you and I... not about you sharing information with me. Lol

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**From:** [REDACTED]@vr.idaho.gov]  
**Sent:** Wednesday, March 20, 2013 2:50 PM  
**To:** Joni L. Ward  
**Subject:** RE: EES redux

This is true... so... then what are you receiving privileged information??

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**From:** Joni L. Ward [<mailto:Joni.Ward@idjc.idaho.gov>]  
**Sent:** Wednesday, March 20, 2013 2:46 PM

**To:** [REDACTED]  
**Subject:** RE: EES redux

Guess I didn't think about that part of his personality.... Work wise, there's no conflict anymore... I am not one of your providers... guess I was looking at it like that.

**Joni Ward**

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**From:** [REDACTED]@vr.idaho.gov]  
**Sent:** Wednesday, March 20, 2013 2:44 PM  
**To:** Joni L. Ward  
**Subject:** RE: EES redux

I wouldn't be too sure.... He is a good guy, but... he is also extremely black and white when it comes to work... if it is even remotely questionable... don't do it... period. If you have to stop and think about something... don't.... he has been pretty clear on that. It is actually something I really like, you don't see that often in this line of work.... I once got my butt chewed almost to the point of reminding me of military service because of the way I answered a question during one of our town halls... I answered it technically the same as a similar question in another part of the state, but he felt I didn't put the same amount of stress on certain parts of it and let me know about it..

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**From:** Joni L. Ward [<mailto:Joni.Ward@idjc.idaho.gov>]  
**Sent:** Wednesday, March 20, 2013 2:40 PM  
**To:** [REDACTED]  
**Subject:** RE: EES redux

Don's a good guy... I'm sure he wouldn't come down too hard on you, even if he knew about you and I.

**Joni Ward**

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**From:** [REDACTED]@vr.idaho.gov]  
**Sent:** Wednesday, March 20, 2013 2:30 PM  
**To:** Joni L. Ward  
**Subject:** RE: EES redux

I don't know if it worked or not... he seems a bit distracted today... so... hard to say if he is pissed or just has something on his mind... oh well... moving on

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**From:** Joni L. Ward [<mailto:Joni.Ward@idjc.idaho.gov>]  
**Sent:** Wednesday, March 20, 2013 2:26 PM

**To:** [REDACTED]  
**Subject:** RE: EES redux

Haha...

**Joni Ward**

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**From:** [REDACTED] [mailto:[REDACTED]@vr.idaho.gov]  
**Sent:** Wednesday, March 20, 2013 2:22 PM  
**To:** [REDACTED]  
**Subject:** RE: EES redux

He sort of beat around the bush on it but, I played dumb and told him all I got from you was the recall notice...

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**From:** Joni L. Ward [mailto:Joni.Ward@idjc.idaho.gov]  
**Sent:** Wednesday, March 20, 2013 2:10 PM  
**To:** [REDACTED]  
**Subject:** RE: EES redux

Haha... so glad it turned out alright. Did you have to explain WHY you sent it to me?

**Joni Ward**

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**From:** [REDACTED]@vr.idaho.gov]  
**Sent:** Wednesday, March 20, 2013 2:05 PM  
**To:** Joni L. Ward  
**Subject:** RE: EES redux

Okay.. yeah.. he saw it... oops... he laughed... talked to me.. and moving on

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**From:** Joni L. Ward [mailto:Joni.Ward@idjc.idaho.gov]  
**Sent:** Wednesday, March 20, 2013 1:59 PM  
**To:** [REDACTED]  
**Subject:** RE: EES redux

HAHA! Yes. Please.

**Joni Ward**

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[IDJC SUDS Website](#)

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**From:** [REDACTED]@vr.idaho.gov]  
**Sent:** Wednesday, March 20, 2013 1:53 PM  
**To:** Joni L. Ward  
**Subject:** RE: EES redux

Yes, yes you do.... Very soon..... and then some pretty serious make up sex

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**From:** Joni L. Ward [<mailto:Joni.Ward@idjc.idaho.gov>]  
**Sent:** Wednesday, March 20, 2013 1:51 PM  
**To:** [REDACTED]  
**Subject:** RE: EES redux

Damn... s\*\*\*\*\* sorry!! I guess he'll know that you BCC'd me...and that I took it back, but he won't see my response.... I deserve a spankin'.

**Joni Ward**

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**From:** [REDACTED]@vr.idaho.gov]  
**Sent:** Wednesday, March 20, 2013 1:49 PM  
**To:** Joni L. Ward  
**Subject:** RE: EES redux

Yeah... he is in a meeting right now so... hopefully you got it before he did.... If not... well, the recall message will tip him off....  
Oops..  
☺

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**From:** Joni L. Ward [<mailto:Joni.Ward@idjc.idaho.gov>]  
**Sent:** Wednesday, March 20, 2013 1:47 PM  
**To:** [REDACTED]  
**Subject:** RE: EES redux

I recalled unread copies...hopefully he won't see it??? I don't know if it notifies him of it or not. At least my response was basic...AND, I don't work with those programs anymore. That should help, right?

**Joni Ward**

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**From:** [REDACTED]@vr.idaho.gov]  
**Sent:** Wednesday, March 20, 2013 1:45 PM

LEDFORDSSD321739

**To:** Joni L. Ward  
**Subject:** RE: EES redux

Yeah.. potentially... it was a private correspondence not intended for public release yet...

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**From:** Joni L. Ward [mailto:Joni.Ward@idjc.idaho.gov]  
**Sent:** Wednesday, March 20, 2013 1:44 PM  
**To:** [REDACTED]  
**Subject:** RE: EES redux

Am sooooo sorry!! I was in a hurry, hit the wrong button. ☹ ☹ ☹ is he gonna be pissed at you?

**Joni Ward**  
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**From:** [REDACTED]@vr.idaho.gov  
**Sent:** Wednesday, March 20, 2013 1:43 PM  
**To:** Joni L. Ward  
**Subject:** RE: EES redux

crap

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**From:** Joni L. Ward [mailto:Joni.Ward@idjc.idaho.gov]  
**Sent:** Wednesday, March 20, 2013 1:40 PM  
**To:** [REDACTED]  
**Subject:** RE: EES redux

Uhm, yes. That was an MC question I'm sure!!

**Joni Ward**  
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**From:** [REDACTED]@vr.idaho.gov  
**Sent:** Wednesday, March 20, 2013 12:55 PM  
**To:** [REDACTED]  
**Subject:** RE: EES redux

Here is the original question and my proposed answer...

Hi Russ,

The \$170,000 increase doesn't take effect until next fiscal year, so I'm going to disregard it for the purposes of this discussion. In regards to the \$170,000 increase though, it has to be remembered that 3% of that funding has been legislatively earmarked for provider rate increases... That will raise the \$36.00 an hour CSE reimbursement rate to \$37.08 and the WS reimbursement rate from \$7.20 to \$7.42. Based on historical numbers, this is going to consume almost \$80,000 before we even get started on waitlist numbers. We have clearly articulated this to the JFAC members and the other legislators that have inquired. The legislators, governor's office and LSO also understand that these figures are extremely rough estimates as the reality of how much will be spent is entirely dependent on what services the individuals we are currently serving require.

On to the questions...

When we originally started establishing individual budgets we pretty quickly realized that there had historically been more hours approved on customer plans than the program was able to fund. As budgets were established for providers and not for specific customers; there had been no reason to track at the state level how many hours our participants really needed. Any differences between what the plans were approved for and the amount of funding provided by the program was offset by the CRP's themselves. After compiling the individual plan authorizations, we discovered that EES had approved approximately \$250,000 a year more in authorizations than the program could support. As the program cannot spend more than the legislatively approved T&B amount, this presented a challenge.

After several meetings with ACCSES members, we were asked to try and keep regional percentages at historical levels. While this didn't entirely follow the concept of matching money with need, it did provide the vehicle to use to address the overfunding issue; EES was able to fully fund individuals to the greatest extent possible and then capping total amounts by region to the historical percentages. This met the goals of the new funding protocol and allowed us to meet the regional stabilization request of our CRP's.

After several more meetings with our stakeholders, it was determined that rarely if ever does a participant in the program fully use all of their yearly budget. Sick days, vacations, holidays, etc... prevent a person from working every day of every week. By developing budgets that exceed the amount of our actual T&B and then basing individual allocations on the 52 week year, we will over budget for our customers on paper, but will also likely guarantee that all of the actual state allocation is spent and leaves nothing on the table at the end of the year. By then capping the individual CRP's based upon the regional historical levels and the customers individual budgets when rolling the program out, we were able to establish a program that serves our participants in a more effective manner, and presents them with the choice and flexibility necessary to meet their need.

One of the difficulties in enacting this process however, has been in working with CRP's to understand that this process is completely unlike the previous methodology. As customers move from one provider to another, their allocation moves along with the person. The initial allocations that were sent out to the providers on October 1<sup>st</sup> of this year was a snapshot in time at that particular moment. When a CRP tries to compare that initial number to current balances, it is no longer accurate. The allocations are live in the sense that they ebb and flow as customers come and go. It is exceptionally important that the CRP understands how much of their customers allocation they have used, and how much is remaining. Under previous systems, it was possible for a provider to over-utilize their CRP allocation, and then make up the shortfall from taking funds from underperforming providers during the latter half of the year. Under the new protocol, there is little if any under-utilization occurring. If a provider exceeds their client authorizations, they will not be paid for services above that amount.

In regards to the specific overages/shortages mentioned in the question.... The initial allocations were put in place with a significant shortage projected at the end of the year. This is a result of the individual budgets being established at the "more than available T&B" rate to ensure that all of this year's T&B allocation be utilized (as explained above). As this was an entirely new way of funding the program, we were starting in the middle of a fiscal cycle and there were some initial questions on how much transient activity would actually take place, we wanted to start out high and then fine tune the process as we moved forward. To this point, the program has operated exactly as projected and as we get

closer to the end of the fiscal year, the margin of error (the overage) has been getting closer to the actual T&B figures just as our modeling projected. There are a few outliers that are skewing the numbers on the quarterly analysis (a few CRP's are expending their client allocations much quicker than anticipated and will potentially zero out their budgets before the end of the year) however, when looking at the regional and state wide projections, we are going to be very close to our target goal of matching the T&B exactly at the end of the year.

There is a possibility that because of switching funding models in the middle of the fiscal year, the program may encounter a deficit at the end of the year as you suggest. That was also discussed during the planning meetings leading up to the implementation of this program and was taken into account as a possibility for the first year of this model. If in fact this does occur, the plan is to carry forward the balance as has been done in the past. Historically, the EES program frequently allowed billing that occurred in the last month of the fiscal year to be carried forward into the next fiscal year and paid the remainder out of those new funds. While this is not an ideal situation and one that we are working towards preventing in future years, there is historical precedence for this occurring. As the customer centered budgets carry forward from one year into the next (there is no resetting of budgets as was done previously) any specific deficit will be carried into the first month of the next year for those CRP's that did not exceed the initially established caps, and did not receive new customers with preestablished budgets during the year. For those CRP's that exhaust their entire allocation, EES will not fund authorizations beyond what was approved on 1 October of this year.

I hope this clears things up, but if not I will be glad to expand upon any additional questions you may have.

From: [REDACTED]@teshinc.com]  
Sent: Wednesday, March 20, 2013 10:41 AM  
To: [REDACTED]  
Subject: EES redux

[REDACTED]  
Please see the correspondence below. I have removed the names to protect the innocent. Can you help clarify?

I am a bit confused by these numbers and I am hoping you, as Accses leadership, can help me.

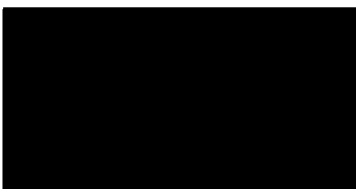
The numbers Russ has below are the numbers that [REDACTED] sent to all providers in September of 2012. In addition to the appropriated \$3,248,300 there was \$83,360 in carry forward for a total of \$3,331,660 available for FY13 services. [REDACTED] approved budgets totaling \$3,520,500, \$272,286 above the amount available. He has said that, given absenteeism, the \$3,331,660 available will be adequate and fully expended. (I note here that [REDACTED] had originally approved budgets above the \$3,331,660 mark and in the September document reduced the total of the approved individual budgets to an arbitrary total per CRP with flexibility to spend on the approved consumers).

JFAC added an additional \$170,000 to the base, \$155,000 which goes towards T&B. The 3% rate increase is \$97,449 of the \$3,248,300 base, bringing the total for T&B to \$3,345,749 for FY14. In order to fund the \$3,331,660 in services provided this year with a 3% fee increase, \$3,431,610 is needed. This is greater than the \$3,345,749 available. We are short \$85,861 without anyone coming off the wait list. Am I missing something?

I finally reached [REDACTED]. He gave me the following figures for FY 13:



Total T&B Budget: \$3,248,300  
Total Individual Budgets: \$3,520,500



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