



MOUNTAIN LAKES
Behavioral Healthcare

ADMINISTRATIVE SERVICES
3200 Willow Beach Road, Guntersville, AL 35976
256-582-4240 • 256-582-4161 (fax)

TO: Board of Directors
FROM: Shelly Pierce, Executive Coordinator
RE: March Board meeting
DATE: March 14, 2025

The next meeting of the Board of Directors will be conducted on **Tuesday, March 18, 2025**, at the Administrative Office in Guntersville. An evening meal will be provided, with the meeting starting at 5:30 pm. Please note that a Board work session will begin at 4:30 pm on this same day.

If you prefer to participate in the Board meeting via teleconference, the connection information is listed below.

March Board Meeting

Mar 18, 2025, 5:30 – 6:30 PM (America/Chicago)

Please join my meeting from your computer, tablet or smartphone.

<https://meet.goto.com/451716053>

You can also dial in using your phone.

Access Code: 451-716-053

United States: [+1 \(312\) 757-3121](tel:+13127573121)

The items listed below are included in this packet for your advanced review:

- March Board Agenda
- Minutes from the February 18, 2025, Board meeting
- Financial Reports through February 28, 2025
- Personnel Report
- IT Director's Report
- Clinical Director's Report
- Recent local newspaper articles
- Minutes from the weekly CCBHC Task Force meetings
- Summary of Reports for February from the CQI Committee
- Minutes from the February Leadership Committee meeting
- March newsletter

Any items needing clarification or requiring Board approval will be discussed at that time. We will make the most efficient use of your time by considering only items of major importance and requiring formal action. Unless noted, all other items will be considered correct.

MARSHALL-JACKSON MENTAL HEALTH BOARD, INC.
MOUNTAIN LAKES BEHAVIORAL HEALTHCARE

March 18, 2025

CCBHC WORK SESSION

4:30 p.m.

MONTHLY MEETING AGENDA

5:30 p.m.

- I. Call the meeting to order – David Kennamer, President
- II. Approval of minutes of the February 18, 2025, meeting – David Kennamer, President
- III. Executive Director’s Report
- IV. Financial reports through February 28, 2025 – Cammy Holland, Business Manager
- V. Written Reports
 - Personnel – Lane Black, HR Coordinator
 - IT – Steve Collins, IT Director
 - Clinical – Dianne Simpson, Clinical Director
- VI. Board requested items for future meeting
- VII. Executive Session

**Marshall-Jackson Mental Health Board, Inc.
Mountain Lakes Behavioral Healthcare**

**Board of Directors Meeting
February 18, 2025**

MINUTES

I. Call to Order

David Kennamer, President, called the meeting to order at 5:29 p.m. at the MLBHC facility located at 16003 AL Hwy 35, Scottsboro, Alabama. Virtual participation was also available for this meeting.

Present: Joe Huotari
Jo-Anne Hutton (Virtual)
John David Jordan
David Kennamer, President
Bill Kirkpatrick
Andrea LeCroy
Victor Manning, Treasurer
Hannah Nixon, Vice-President
Lucien Reed
Jane Seltzer, Secretary

Absent: None

Staff: Lane Black, HR Coordinator
Kathy Anne Chapman, Program Coordinator, Dutton Residential Facility
Dana Childs, QA Coordinator/Clinical Administrative Assistant
Steve Collins, IT Director
Myron Gargis, Executive Director
Cammy Holland, Business Manager
Wes Morgan, IT Specialist
Dianne Simpson, Clinical Director

II. Approval of the minutes of the January 21, 2025, Board meeting – David Kennamer, President

MOTION: Hannah Nixon made a motion that the Board approve the minutes of the January 21, 2025, meeting, as presented. Victor Manning seconded the motion, which was approved unanimously.

III. Executive Director's Report

The Executive Director's Report for February (Appendix A) was submitted in written format and made available to all Board members for review prior to the meeting. During discussion of the implementation of CCBHC, the following items were noted:

- As authorized at last month's meeting, Mr. Gargis has explored loan or line of credit options to cover approved expenses for the transition to CCBHC. His recommendation to the Board would be to pursue a 6% fixed rate commercial line of credit with Cadence Bank.

MOTION: Victor Manning made a motion that the Board authorize Mr. Gargis to secure a 6% fixed rate commercial line of credit with Cadence Bank. Hannah Nixon seconded the motion, which was approved unanimously.

- As requested last month, Mr. Gargis reviewed with Board members the listing of new services/staff positions that were included in the Costing Report.
- As related to the Costing Report, Mr. Gargis announced that DMH submitted our proposed PPS rate to Alabama Medicaid for review. The proposal will then go to CMS for review and potential approval. While some negotiation is a possibility, all are hopeful to be approved at the proposed rate.
- In regard to the employment of new staff positions, a recommendation was made for Mr. Gargis and Mr. Black to develop a timeline detailing which positions would need to be hired at what intervals.
- Mr. Gargis noted that DMH would allow three months into the transition to CCBHC before conducting an audit.
- Due to all of the details and information relating to CCBHC, a recommendation was made for the Board to conduct a work session prior to the March 18, 2025, Board meeting. The work session will begin at 4:30 pm, with the regular meeting at 5:30 pm.

IV. Financial reports through January 31, 2025 – Cammy Holland, Business Manager

Ms. Holland noted that all regular financial reports were included in the monthly packet and asked if there were any questions in regard to these items.

The FY25 Program Summary reflected a net income for all programs, with the exception of Jackson County MHC, Substance Use and Substance Use Prevention.

The current Balance Sheet, which included Board Investments, indicated Total Cash of \$724,299. This total is \$961,369 less than this same time period last year. Continued review reflected Total Accounts Receivable of \$1,967,543, which is \$432,642 less than in FY24.

The Income Statement, which does not include Board Investments, reflected a YTD Net Income of \$83,069, which is \$35,496 more than in FY24.

V. Written Reports

The Personnel, IT and Clinical Reports were submitted in written format for the monthly Board packets. Any items of question or requiring Board action will be discussed during the meeting.

During discussion of the IT Report, Mr. Collins introduced Wes Morgan as one of MLBHC's IT Specialists. Mr. Morgan researched and secured a free version of Office 365 Base Package for non-profit organizations, saving MLBHC approximately \$60K. All expressed appreciation to Mr. Morgan for his efforts.

The Clinical Director's report included information on the Dutton Residential Facility. Ms. Simpson introduced Kathy Anne Chapman as the Program Coordinator for the DRF. Ms. Chapman shared that she and her family recently moved to Alabama and that she was hopeful to secure a position such as the one she has at Dutton Group Homes.

VI. Board requested items for future meetings

As noted above, the Board will conduct a work session prior to the March 18, 2025, monthly meeting.

VII. Executive Session

Mr. Kennamer announced that the Board needed to enter into Executive Session to discuss the job performance/annual evaluation of the Executive Director and the possible purchase of property in Jackson County.

MOTION: Bill Kirkpatrick made a motion that the Board enter into Executive Session at 6:45 p.m. to discuss the job performance/annual evaluation of the Executive Director and the possible purchase of property in Jackson County. Victor Manning seconded the motion, which was approved unanimously.

MOTION: Victor Manning made a motion that the Board reconvene the regular meeting at 7:52 p.m. and adjourn. Jane Seltzer seconded the motion, which was approved unanimously.

David Kennamer, President
Marshall-Jackson Mental Health Board, Inc.

Jane Seltzer, Secretary
Marshall-Jackson Mental Health Board, Inc.

APPENDIX A

Executive Director's Report – February 18, 2025

Transportation Service Updates

In January, Jackson County completed 37 transports, while Marshall County recorded 221 transports (Day Treatment – 175; Outpatient – 46).

Albertville City Schools Mental Health Grant

Albertville City Schools were recently awarded a \$3.5 million, five-year grant to expand School-Based Mental Health services. As part of this initiative, they have committed to contracting with us for one additional Master's-level Therapist. Additionally, if they can reallocate funds within their grant budget, they hope to add two more Master's-level Therapists, bringing the potential total to three new positions. These new roles are expected to begin at the start of the next school year (August).

Alabama Legislative Meetings

Last week, the Alabama Council for Behavioral Healthcare held its annual legislative meetings in Montgomery. We had productive discussions with legislators and are optimistic about the FY26 budget. Attached is the one-pager we used during our meetings.

16-bed Crisis Stabilization Unit

On February 7th, Judge LeCroy and Sheriff Simms convened a meeting with the Marshall County Mental Health Task Force, DMH Commissioner Kim Boswell, and her staff. We had a highly productive discussion regarding the critical shortage of voluntary and involuntary inpatient beds in our region. Commissioner Boswell announced that MLBH will receive funding to operate a 16-bed crisis stabilization unit starting in FY26, contingent on the \$10 million crisis bed expansion funding remaining in the FY26 state budget.

Certified Community Behavioral Health Clinic (CCBHC)

Discussion on anticipated new costs and payment structures related to CCBHC implementation. Please review the attached spreadsheet for further details.

**MOUNTAIN LAKES BEHAVIORAL HEALTHCARE
PROGRAM SUMMARY**

FOR THE MONTH ENDED FEBRUARY 28, 2025

PROGRAM	BUDGETED REVENUE		ACTUAL REVENUE		BUDGETED EXPENSES		ACTUAL EXPENSES		Budget vs Actual Revenues \$		Budget vs Actual Revenues %		Budget vs Actual Expenses \$		Budget vs Actual Expenses %		BUDGETED OPERATING INCOME	ACTUAL OPERATING INCOME	DEPRECIATION EXPENSE	NET INCOME (LOSS)	Variance +/- % Comments		
1000 Administration	45,665	17,118	45,665	3,203	(28,547)	-166.77%	(28,547)	-166.77%	0	13,915	13,915	0	0	0	0	0	0	0	0	0	0		
1300 Region 1 Project	15,202	15,202	15,202	15,202	(0)	0.00%	0	0.00%	0	(0)	(0)	0	0	0	0	0	0	0	0	0	0		
2110 Marshall County MHC	290,083	360,336	283,134	296,606	70,253	19.50%	15,792	5.32%	6,948	63,729	2,320	2,320	61,409	0	0	0	0	0	0	0	0		
2210 Jackson County MHC	216,409	204,786	217,899	223,033	(11,623)	(0)	8,023	3.60%	(1,490)	(18,247)	2,890	0	(21,136)	0	0	0	0	0	0	0	0		
2300 Geriatrics	32,950	38,414	31,039	33,452	5,464	14.22%	2,413	7.21%	1,911	4,962	0	0	4,962	0	0	0	0	0	0	0	0		
2400 Behavioral Health Unit (BHU)	20,058	66,723	20,058	66,723	46,665	0.00%	46,665	0.00%	0	0	0	0	0	0	0	0	0	0	0	0	0		
2610 Dogwood Apartments	5,679	6,270	4,395	3,215	591	9.43%	(392)	-12.20%	1,284	3,055	788	0	2,267	0	0	0	0	0	0	0	0		
2620 EBP Supportive Housing	13,726	14,401	13,724	14,288	675	4.89%	564	3.95%	2	113	0	0	113	0	0	0	0	0	0	0	0		
2640 Dutton Facilities	83,014	114,795	89,611	100,596	31,780	27.68%	15,976	15.89%	(6,597)	14,239	5,031	0	9,208	0	0	0	0	0	0	0	0		
2650 Jackson Place	36,767	38,396	34,406	29,037	1,629	4.24%	(3,690)	-12.67%	2,361	9,359	1,690	0	7,670	0	0	0	0	0	0	0	0		
2851 Marshall Place	20,945	23,415	27,051	28,734	2,469	10.55%	2,070	7.20%	(6,105)	(5,320)	386	0	(5,706)	0	0	0	0	0	0	0	0		
3030 Substance Use	110,317	115,875	110,840	119,519	5,559	4.80%	15,885	13.29%	(523)	(3,644)	7,206	0	(10,849)	0	0	0	0	0	0	0	0		
3060 Prevention	30,908	31,277	30,002	30,197	369	1.18%	195	0.65%	906	1,080	0	0	1,080	0	0	0	0	0	0	0	0		
Board Investments	22,886	9,051	1,637	1,298	(13,834)	-152.84%	598	46.06%	21,249	7,754	937	0	6,817	0	0	0	0	0	0	0	0	0	
Grand Total	944,610	1,056,060	924,664	965,063	(125,284)	-13.27%	74,964	7.94%	(1,303)	83,243	34,226	0	49,017	0	0	0	0	0	0	0	0	0	

Budget is divided equally over 12 months. Actual is based on the activity during the month.

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**MOUNTAIN LAKES BEHAVIORAL HEALTHCARE
PROGRAM SUMMARY**

FOR THE FIVE MONTHS ENDED FEBRUARY 28, 2025

PROGRAM	BUDGETED REVENUE		ACTUAL REVENUE		BUDGETED EXPENSES		ACTUAL EXPENSES		Variance \$	Variance %	Budget vs Actual Revenues \$	Budget vs Actual Revenues %	Budget vs Actual Expenses \$	Budget vs Actual Expenses %	BUDGETED OPERATING INCOME	ACTUAL OPERATING INCOME	DEPRECIATION EXPENSE	NET INCOME (LOSS)	Variance +/- %	Comments
	BUDGETED REVENUE	ACTUAL REVENUE	BUDGETED EXPENSES	ACTUAL EXPENSES	BUDGETED OPERATING INCOME	ACTUAL OPERATING INCOME	DEPRECIATION EXPENSE	NET INCOME (LOSS)												
1000 Administration	228,326	65,777	228,326	(3,796)	(162,549)	-247.12%	(162,546)	-247.10%	0	69,573	69,576	(3)								
1300 Region 1 Project	76,012	76,012	76,012	76,012	(0)	0.00%	0	0.00%	0	(0)	0	0								
2110 Marshall County MHC	1,450,413	1,599,310	1,415,672	1,450,342	148,897	9.31%	46,270	3.19%	34,741	148,968	11,601	137,366								
2210 Jackson County MHC	1,082,044	1,032,354	1,089,494	1,083,892	(49,690)	(0)	8,846	0.82%	(7,449)	(51,536)	14,448	(65,985)								
2300 Geriatrics	164,750	182,070	155,197	164,631	17,319	9.51%	9,434	5.73%	9,553	17,438	0	17,438								
2400 Behavioral Health Unit (BHU)	100,290	184,998	100,290	184,998	84,708	0.00%	84,708	0.00%	0	0	0	0								
2610 Dogwood Apartments	28,396	31,835	21,976	16,192	3,439	10.80%	(1,844)	-11.39%	6,419	15,643	3,940	11,703								
2620 EBP Supportive Housing	68,631	75,263	68,621	70,297	6,652	8.84%	1,577	2.39%	10	4,985	0	4,985								
2640 Dutton Facilities	415,072	585,838	448,054	498,762	170,766	29.15%	75,864	15.21%	(32,983)	87,076	25,157	61,919								
2650 Jackson Place	183,836	199,313	172,032	158,856	15,477	7.77%	(4,729)	-2.98%	11,803	40,457	8,448	32,009								
2651 Marshall Place	104,727	139,315	135,254	135,474	34,588	24.83%	2,151	1.59%	(30,527)	3,841	1,931	1,910								
3030 Substance Use	551,584	557,098	554,198	573,807	5,514	0.99%	55,637	9.70%	(2,614)	(16,709)	36,028	(52,737)								
3060 Prevention	154,539	129,053	150,009	145,576	(25,466)	-19.75%	(4,433)	-3.04%	4,530	(16,523)	0	(16,523)								
Board Investments	114,429	166,869	8,183	5,352	52,439	31.43%	1,853	34.62%	106,246	161,516	4,684	156,832								
Grand Total	4,723,048	5,025,123	4,823,318	4,560,395	249,636		111,036		99,730	464,727	175,812	288,916								

Budget is divided equally over 12 months. Actual is based on the activity during the month

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**REVENUE & EXPENSE REPORT FOR THE
FIVE MONTHS ENDED FEBRUARY 28, 2025**

	PROGRAM	BUDGET	ACTUAL
Revenue	1500 REGION 1 PROJECT	<u>76,012</u>	<u>76,012</u>
Expense		<u>76,012</u>	<u>76,012</u>
Revenue	2110 MARSHALL COUNTY MHC	<u>1,450,413</u>	<u>1,599,310</u>
Expense		<u>1,415,672</u>	<u>1,450,342</u>
Revenue	2210 JACKSON COUNTY MHC	<u>1,082,044</u>	<u>1,032,354</u>
Expense		<u>1,089,494</u>	<u>1,083,892</u>
Revenue	2300 GERIATRICS	<u>164,750</u>	<u>182,070</u>
Expense		<u>155,197</u>	<u>164,631</u>
Revenue	2400 BEHAVIORAL HEALTH UNIT	<u>100,290</u>	<u>184,998</u>
Expense		<u>100,290</u>	<u>184,998</u>
Revenue	2610 DOGWOOD APARTMENTS	<u>28,396</u>	<u>31,835</u>
Expense		<u>21,976</u>	<u>16,192</u>
Revenue	2620 EBP SUPPORTIVE HOUSING	<u>68,631</u>	<u>75,283</u>
Expense		<u>68,621</u>	<u>70,297</u>
Revenue	2640 DUTTON FACILITIES	<u>415,072</u>	<u>585,838</u>
Expense		<u>448,054</u>	<u>498,762</u>
Revenue	2650 JACKSON PLACE	<u>183,836</u>	<u>199,313</u>
Expense		<u>172,032</u>	<u>158,856</u>
Revenue	2651 MARSHALL PLACE	<u>104,727</u>	<u>139,315</u>
Expense		<u>135,254</u>	<u>135,474</u>
Revenue	3030 SUBSTANCE USE	<u>551,584</u>	<u>557,098</u>
Expense		<u>554,198</u>	<u>573,807</u>
Revenue	STR/CURES/SOR (Part of the Substance Use Program)	<u></u>	<u>16,679</u>
Expense		<u></u>	<u>10,418</u>
Revenue	3060 PREVENTION	<u>154,539</u>	<u>129,053</u>
Expense		<u>150,009</u>	<u>145,576</u>

2025 COMPARATIVE INCOME STATEMENT

As of Accounting Period 5

	41.67%	<u>FY 2024</u>	<u>FY 2025</u>	<u>\$</u>	<u>%</u>
				<u>VARIANCE/YEAR</u>	
Medicaid % of Budget		\$1,324,471 36.44%	\$1,801,926 50.26%	\$477,455	26.50%
DMH		\$ 2,633,920 46.72%	\$ 2,377,920 40.14%	\$ (256,000)	-10.77%
Medicare		\$ 12,524 39.23%	\$ 12,797 43.38%	\$ 273	2.13%
Self Pay		\$ 49,019 34.23%	\$ 105,217 98.31%	\$ 56,198	53.41%
Insurance		\$ 265,511 52.14%	\$ 231,227 38.05%	\$ (34,284)	-14.83%
Total Operating Revenue		\$4,638,424 43.42%	\$4,858,254 43.85%	\$ 219,830	4.52%
Salary		\$ 2,383,988 44.11%	\$ 2,756,855 43.92%	\$ 372,867	13.53%
Fringe		\$ 497,289 43.13%	\$ 544,871 45.13%	\$ 47,582	8.73%
Misc Exp-BHU		\$ 145,225 60.34%	\$ 184,998 76.86%	\$ 39,773	21.50%
Fees Contract Staff		\$ 19,250 28.33%	\$ 38,742 25.30%	\$ 19,492	50.31%
Travel		\$ 95,939 40.76%	\$ 110,340 45.37%	\$ 14,401	13.05%
Total Operating Expenses		\$4,031,852 42.47%	\$4,550,359 42.97%	\$518,507	11.39%
Operating Income		\$606,572	\$307,896	(\$298,676)	-97.01%
Depreciation		(\$148,487)	(\$175,812)	(\$27,325)	15.54%
Net Income/(Loss)		<u>\$458,085</u>	<u>\$132,084</u>	<u>(\$326,001)</u>	

***Does not include Board Investments

2025 COMPARATIVE BALANCE SHEET

As of Accounting Period 5

	<u>FY 2024</u>	<u>FY 2025</u>	<u>\$</u>	<u>%</u>
			<u>VARIANCE</u>	
Current Assets				
Cash	\$1,074,607	\$444,077	\$ (630,530)	-141.99%
Total Receivables	\$2,250,594	\$2,369,804	\$ 119,210	5.03%
Total Other Current Assets	<u>\$3,437,361</u>	<u>\$3,434,537</u>	<u>\$ (2,824)</u>	<u>-0.08%</u>
Total Current Assets	\$6,762,563	\$6,248,417	-\$514,146	-8.23%
Long Term Assets				
Fixed Assets	\$3,215,818	\$3,300,501	\$ 84,683	2.57%
Other Long Term Assets	<u>\$6,431,111</u>	<u>\$6,983,552</u>	<u>\$ 552,441</u>	<u>7.91%</u>
Total Long Term Assets	\$9,646,929	\$10,284,054	\$ 637,125	6.20%
Total Assets	<u>\$16,409,492</u>	<u>\$16,532,471</u>	<u>\$ 122,979</u>	<u>0.74%</u>
Liabilities				
Current Liabilities	(\$753,193)	(\$633,169)	\$ 120,024	-18.96%
Long Term Liabilities	<u>\$0</u>	<u>\$0</u>	<u>\$ -</u>	
Total Liabilities	(\$753,193)	(\$633,169)	\$ 120,024	-18.96%
Net Assets				
Unrestricted Net Assets	(\$14,513,195)	(\$15,610,386)	\$ (1,097,191)	7.03%
Net (Income) Loss	<u>(\$1,143,104)</u>	<u>(\$288,916)</u>	<u>\$ 854,188</u>	<u>-295.65%</u>
Total Net Assets	(\$15,656,299)	(\$15,899,302)	\$ (243,003)	1.53%
Total Liabilities and Net Assets	<u>(\$16,409,492)</u>	<u>(\$16,532,471)</u>	<u>(\$122,979)</u>	<u>0.74%</u>

Other Information

February 2025

Transportation	<u>Marshall County</u>	<u>Jackson County</u>	
Miles driven in month	2,193.80	1,224.00	
Number of riders	174	36	
Fuel Purchased	510.41	148.61	
Average Price/gallon	2.79	2.77	
Maintenance	136.53	430.47	oil change/car wash/windshield replace
Depreciation	869.78	842.00	
Salary			
 Cost/rider	 8.72	 39.47	

Client Medical Expense	<u>Dutton</u>	<u>Jackson Place</u>	<u>Marshall Place</u>	<u>Cedar Lodge</u>	
Pharmacy	3,146.26	87.30	292.56	119.02	
Physician Charges				1,083.00	
Co-Pays/Deductibles	107.48				
	<hr/> 3,253.74	87.30	292.56	1,202.02	4,835.62

Consumer Housing	<u>Duplex-Board Inv</u>
# of Available Units	-
# of Units Rented	2.00
Rental Revenue	800.00

**Mountain Lakes Behavioral Healthcare
Estimated Net Accounts Receivable Aging
As of February 28, 2025**

Self Pay

	30	60	90	>90	Total
A/R Balance as of 2/28/25	88,466.73	19,369.36	48,920.08	70,355.41	227,111.58
Adjustment %	93.50%	93.50%	93.50%	93.50%	
Estimated Net Self Pay A/R Balance	5,750.34	1,259.01	3,179.81	4,573.10	14,762.25

DHR and Probate

	30	60	90	>90	Total
A/R Balance as of 2/28/25	6,252.08	1,500.00	500.00	1,481.23	9,733.31
Adjustment %	0.00%	0.00%	0.00%	0.00%	
Estimated Net DHR/Probate A/R Balance	6,252.08	1,500.00	500.00	1,481.23	9,733.31

Medicare

	30	60	90	>90	Total
A/R Balance as of 2/28/25	3,985.56	362.20	195.46	-	4,543.22
Adjustment %	70.00%	70.00%	70.00%	70.00%	
Estimated Net Medicare A/R Balance	1,195.67	108.66	58.64	-	1,362.97

Medicaid

	30	60	90	>90	Total
A/R Balance as of 2/28/25	420,664.04	25,383.84	22,687.17	25,689.29	494,424.34
Adjustment %	31.88%	31.88%	31.88%	31.88%	
Estimated Net Medicaid A/R Balance	286,556.34	17,291.47	15,454.50	17,499.54	336,801.86

Insurance

	30	60	90	>90	Total
A/R Balance as of 2/28/25	64,073.53	4,812.58	8,225.30	10,833.34	87,944.75
Adjustment %	51.67%	51.67%	51.67%	51.67%	
Estimated Net Insurance A/R Balance	30,966.74	2,325.92	3,975.29	5,235.75	42,503.70

ASAIS

	30	60	90	>90	Total
A/R Balance	269,486.47	67,566.70	1,942.43	-	338,995.60
Adjustment %	33.00%	33.00%	33.00%	33.00%	
Estimated Net Insurance A/R Balance	180,555.93	45,269.69	1,301.43	-	227,127.05

Total

	30	60	90	>90	Total
A/R Balance as of 2/28/25	852,928.41	118,994.68	82,470.44	108,359.27	1,162,752.80
Average Adjustment %					
Estimated Net Total A/R Balance	511,277.10	67,754.75	24,469.66	28,789.63	632,291.14

MLBH PERSONNEL REPORT

3/18/2025

NEW HIRES

PRN	Miranda Hambrick	Life Skills Specialist	2/20/2025	Dutton Group Homes
FT	Danny Quick	Life Skills Specialist	3/4/2025	Substance Use
PT	Keith Holcombe	Intake Coordinantor	3/4/2025	Both Counties
PT	Kristen Perigo	Therapeutic Mentor	3/11/2025	MCMHC

SEPARATIONS (VOLUNTARY)

DOH	FT	Ross Warner	Crisis Coordinator	2/21/2025	Administration
			<i>Resignation Reason</i>		<i>Change in Position</i>
DOH	FT	Melissa Blanks	Parent Peer Support	2/28/2025	JCMHC
			<i>Resignation Reason</i>		<i>Disatisfaction after Productivty Suspension</i>
DOH	FT	Bradley Bewley	Life Skills Specialist	3/6/2025	
			<i>Resignation Reason</i>		<i>Walked off job--personal issues</i>
DOH	FT	KathyAnne Chapman	Program Coordinator	2/28/2025	Dutton Group Homes
			<i>Resignation Reason</i>		<i>personal conflicts</i>

SEPARATIONS (INVOLUNTARY)

DOH	PRN	Kimberly Garmon	Life Skills Specialist	2/27/2025	Marshall Place
					performance issues

NEW POSITIONS ADDED

TRANSFERS

PROMOTIONS

NOTE: Intern Sierra Adams began in Marshall County on 03/03/25

AIH = Adult In-Home

CAIH = Child/Adolescent In-Home

CRNP = Certified Registered Nurse Practitioner

NL= Non-Licensed

QSAP = Qualified Substance Abuse Professional

SU = Substance Use

SLP=Sign Language Proficient

TPR= Treatment Plan Review

CURRENT OPEN POSITIONS

JP LSS FT (1) PRN (2)

Therapeutic Mentor JC PT(1)

MP LSS PRN (1)

Crisis Coordinator FT (1)

Contingency Management Specialist FT (1)

Program Coordinator FT Dutton Group Homes (1)

**IT Board Report
MAR 2025**

Items Completed from last reports:

- First IT Contractor fell thru.
- DHCP scope cleanup.
- Vmail cleanup.
- Barracuda maint renewals.
- PDQ Server build and testing.
- Fog Server build and testing.
- ADSync software installed for 365.

New Items / Continued:

- Install IP Phones at New Sboro location. Waiting on move in.
- ATT phone service renewal waiting on countersigned contract.
- Bunch of CCBHC changes / additions in Avatar.
- Start prep work / conversations for Msoft 365 / Azure Cloud services.
- Trying to implement Non Profit version of 365.
- Implement Azure AD Connect.
- Lots of Avatar patches to install.
- SSL Certificates for year 2025.
- Renewals for support services on several products forthcoming.
- Secureworks acquired by SOPHOS. What changes will ensue?
- Exchange prereq updates for 365 Hybrid deployment?
- Working with contractor #2 to assist with 365 Hybrid setup Agreements.
- Cabling additions for addl office builds at new Sboro.
- Secureworks Billing issues.
- Avatar Reporting Servers move to AWS.

Clinical Services Report

March 2025

High Intensity Care Coordination (Child/Adolescent)

In 2017, as part of a settlement agreement under the federal Medicaid Early and Periodic Screening, Diagnostic a Settlement and Treatment (EPSDT) statute, the State of Alabama expanded intensive in home and community-based services for youth with a serious emotional disturbance (SED). One of the services that was established was Intensive Care Coordination (ICC).

Intensive Care Coordination (ICC) is a service where a Care Coordinator works directly with children, youth, or young adults (ages 0-20) and their families. There are two levels of ICC, Low Intensity Care Coordination (LICC) and High Intensity Care Coordination (HICC). Both coordinate support and services and monitor a care plan that includes medically necessary services. HICC meets with families more often and is able to provide more comprehensive services and support across multiple agencies for children, youth, or young adults with more complex needs. MLBHC employs a full time HICC in each county.

The HICC works directly with the youth and their family by facilitating the care planning process, coordinating necessary services and supports, and preparing and monitoring their individualized care plan. The HICC ensures that the youth's individual mental health needs are met through the identification, coordination, and monitoring of services and supports that allow them to remain in their home and community.

Due to the intensity of the HICC service, it is billed as a monthly encounter rather than by the unit. The caseload for the HICC is limited to no more than 18.

February 19, 2025

The Advertiser-Glean

Traverse to...



A conversation on mental health

By Claudette DeMuth
Marshall Medical

On Friday, February 7, Marshall Medical Centers hosted a productive meeting focused on improving mental health services in Marshall County. Bringing together such a diverse group of stakeholders

— like state mental health officials, law enforcement, healthcare providers and local legislators — can be an effective way to address the mental health challenges the community faces. Collaboration between these groups could lead to better resource allocation, streamlined services and a more integrated approach to care. “We appreciate the opportunity to meet with

the team of individuals who are currently addressing the mental health challenges in Marshall County. The quality of care currently being delivered is excellent — and we look forward to supporting whatever we can do at the State level to bring improvements to this area of need,” stated Kim Boswell, Commissioner of the Alabama Department of Mental Health.



It was a round table type discussion for the group looking into improving mental health services in the county.



A large group got together last week to talk about mental health services in Marshall County. Pictured are 1st Row: Casey Baugh, Social Worker, Marshall Medical Centers - Traci Stewart, Chief Operating Officer, Marshall Medical Centers - Senator Wes Kitchens, District 9 - Representative Brock Colvin, District 26 - Kim Boswell, Commissioner Alabama Department of Mental Health - Representative Jeana Ross, District 27 - Andrea LeCroy, Marshall County Probate Judge - April Gentry, Director of Case Management, Marshall Medical Centers - Leah Jones, RN, Nurse Manager, Marshall Medical Centers Behavioral Health Unit - Brittany Fricks, Case Management, Marshall Medical Centers; and 2nd Row, Tammy Jennings, RN, Director of Acute Care, Marshall Medical Centers, Kathy Woodruff, Chief Nursing Officer, Marshall Medical Centers - Myron Gargys, Executive Director, Mountain Lakes Behavioral Healthcare - Dr. Greg Ciaccio, Behavioral Health / Psychiatric Care, Marshall Medical Centers - John Young, Marshall County Investigator - Brandy Rains, Marshall County Probate Clerk - Jeremy Barrage, Marshall County Mental Health Officer - and Phil Sims, Marshall County Sheriff.

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Some article published in the Sand Mountain Reporter on February 26, 2025

Governor signs Mental Health bill

The ceremonial signing of Senate Bill 240, Alabama Mental Health, took place last fall. This bill expands the involuntary commitment to include individuals with co-occurring substance use disorder. Mental Health was the project of the Plan, Leadership, Accountability and Networking (PLAN 2024) Leadership Group. The PLAN 2024 group is made up of thirteen second-term county commissioners from across the state.

Marshall County District 2 Commissioner, Rick Watson, is a member of this group. This group was tasked to come up with a project, individually or as a group, that would make their county and state a better place. Members were asked to list the top three priorities in their counties, and mental health was, overwhelming, the top response. SB 240 is the culmination of the group's efforts.

The group also worked to expand the "Stepping Up Program" in Alabama. The Stepping Up Program is a national program that was started in May 2015 by the National Association of Commissioners and partners, the Council of State Governments Justice Center and the American Planning Association Foundation. This program works to break down silos and foster relationships that result in providing individuals with the necessary resources and treatment to place them on positive path.

Since the first Stepping Up Programs began in 2019, Alabama has screened 46,393 people for serious mental health (SMI) and substance abuse (SA) and more than 9,609 people screened positive for SMI and/or SA. PLAN

2024's goal was to get all 67 counties in Alabama signed up for the Stepping Up Program, but unfortunately the group fell short of this goal.

"In 2023 when we started, 17 counties were participating in Stepping Up, and now there are 49 counties that will be participating next year. I am happy to say Marshall County was one of the additions and will be participating in Stepping Up next year," Commissioner Watson said.

"Mental health in Alabama is a major problem because the state, years ago, placed the responsibility of treating individuals with mental health disorders back on the local governments. Facilities with the necessary bed space and expertise to take care of mental patients is in very short supply. Marshall Medical Center North has space for 10 patients, but most of the time there is only enough staff to cover eight, and these spaces are for short-term stays. When families have loved ones who are a threat to themselves or others, they call the Sheriff's Department, and the responding officer takes the individual into custody. The county jails are where these patients go when they are arrested, and they stay there until they can be evaluated and moved to a mental health facility, if space is available.

"The average number used when talking about inmates with mental health issues in county jails is 30% of the population; some sheriffs say this number is probably on the low side.

"Our state's mental health crisis is a problem that was not created overnight, and it will not be corrected overnight, but SB240 and the Stepping Up Program are steps in the right direction."

The Advertiser Gleaner



Alabama Governor Kay Ivey signs Senate Bill 240, Alabama Mental Health in a ceremony. Present for the signature was Rick Watson, Marshall County Commissioner for District 2, second on the right.

CCBHC Task Force
February 26, 2025

MINUTES

Present: Myron Gargis, Cammy Holland, Dana McCarley, Shelly Pierce, Erica Player and Dianne Simpson

Absent: None

Today was the first meeting of the CCBHC Task Force. Myron shared that the work of the group was extremely important and that there were several fundamental issues to address. Under the CCBHC model, MLBHC will have more resources, which equates to more responsibility to consumers and to the community.

The first item addressed by the group was to review the listing of new staff positions under CCBHC.

- With the Direct Cost Positions, the following items were noted:
 - Funding for these new positions is anticipated to be available July 1, 2025, as is the enhanced money for triggering events.
 - Any new positions filled will cost us money from the time of employment until July 1, 2025.
 - With these items in mind, the task force was in agreement that the employment date for these positions would be no earlier than the tentative date of CCBHC certification – July 1, 2025.
 - All positions to be posted internally on March 31, 2025, with a two week window for current staff to express interest.
 - External recruitment to begin on April 14, 2025.
 - Any possible rehires would also be contacted at this time. (Task force to update the list of former employees to be contacted in regard to possible rehire.)
 - Pertinent staff to be working on job descriptions for all new positions as these will accompany internal postings and external recruitment.
- With the Indirect Cost – Admin/Support Positions, task members discussed the following:
 - After review of all positions in this listing, the group agreed to wait until July 1, 2025 (at the earliest) to fill new positions with the exception of three:
 - HR Assistant – to be posted internally on May 1, with a two week window for current staff to express interest.
 - Assistant Clinical Director – to be posted internally on April 1, with a two week window for current staff to express interest.
 - Training Specialist – to be posted internally on June 2, with a two week window for current staff to express interest.
 - Following the two week window for current staff to express interest in these positions, external recruitment will begin.

The next item addressed by the task force was that of scheduling. Myron noted the future need to not only continue to schedule our current clients, but to also schedule new clients coming in for services.

- The group randomly reviewed current schedules of several Outpatient Therapists in both Marshall and Jackson County. (Of the schedules reviewed, the number of appointments per day ranged from 6-10.)
 - Task force members agreed that the current scheduling method is not efficient and definitely has room for improvement. (Under the current fee for service plan, therapy rates are paid depending on the length of the appointment. With CCBHC, 30 minutes, 45 minute or 1 hour therapy appointments will all be paid at the same rate.)
- A draft optimized full-day staggered schedule was distributed and reviewed by task force members. This draft included a full-day of outpatient therapy appointments scheduled for lengths of 30 minutes, 45 minutes and 1 hour, which totaled 16 appointments per day. It was noted that the draft schedule might not be realistic and that a goal of approximately 12 appointments per day seemed more feasible.
 - The group discussed the possible idea of having the therapist determine when a client should return for their next appointment and approximately how much time would be needed (i.e. 30 minutes in 3-4 weeks). Front desk staff would then review the therapist's schedule and fill with the appointment that best matches the specific needs of that client. It was noted that the desired scheduling method would need to be implemented soon so that all kinks could be resolved prior to July 1, 2025.

Task force members were asked to continue to review the draft schedule for Outpatient Therapy appointments, as it would be discussed in more detail at next week's meeting. This same type evaluation will likely be conducted for the schedules of Intake Coordinators, Prescribers and RNs.

CCBHC Task Force

March 5, 2025

MINUTES

Present: Myron Gargis, Cammy Holland, Dana McCarley, Shelly Pierce, Erica Player (virtual) and Dianne Simpson

Absent: None

Myron noted that the objective for today's meeting was to approve a schedule template for Outpatient Therapists and to develop a plan for implementation of those schedules.

As follow-up from the last meeting, the group continued to evaluate current schedules for Outpatient Therapists. Schedules for several staff members that were not reviewed last week were checked today and it was reaffirmed by all task force members that the current scheduling method is ineffective and unacceptable.

With this in mind, all pertinent staff members are to be instructed to maximize the schedules for Outpatient Therapists and to ensure that appointment openings are filled. Dianne, Dana and Erica are to review the current schedules on a daily basis until the new scheduling system is in place.

Task force members then evaluated several draft full-day staggered schedules to determine which would best meet the needs of not only our current clients, but also the new clients that will be coming in for future services.

After review and discussion by all CCBHC Task Force members, the following motion was made:

MOTION: Erica Player made a motion that the CCBHC Task Force approve the Outpatient Therapist schedule template below, with an effective date of May 1, 2025. Dianne Simpson seconded the motion, which was approved unanimously.

13 Appointments per Day

<u>Booking Time</u>	<u>Appointment Length</u>	<u>Front Desk Instructions</u>
8:00 - 8:35 AM	45 min	FD instructs/writes appt. for 7:50 on slips
8:35 - 9:00 AM	30 min	FD instructs/writes appt. for 8:25 on slips
9:00 - 9:50 AM	60 min	FD instructs/writes appt. for 8:50 on slips
9:50 - 10:20 AM	45 min	FD instructs/writes appt. for 9:40 on slips
10:20 - 10:55 AM	30 min	FD instructs/writes appt. for 10:10 on slips
10:55 - 11:10 AM	15-Minute Documentation Buffer	
11:10 - 11:40 AM	45 min	FD instructs/writes appt. for 11:00 on slips
11:40 - 12:00 PM	30 min	FD instructs/writes appt. for 11:30 on slips
12:00 - 1:00 PM	Lunch (1 Hour)	
1:00 - 1:35 PM	45 min	FD instructs/writes appt. for 12:50 on slips
1:35 - 2:00 PM	30 min	FD instructs/writes appt. for 1:25 on slips

<u>Booking Time</u>	<u>Appointment Length</u>	<u>Front Desk Instructions</u>
2:00 - 2:50 PM	60 min	FD instructs/writes appt. for 1:50 on slips
2:50 - 3:15 PM	30 min	FD instructs/writes appt. for 2:40 on slips
3:15 - 3:30 PM	15-Minute Documentation Buffer	
3:30 - 3:55 PM	30 min	FD instructs/writes appt. for 3:20 on slips
3:55 - 4:25 PM	45 min	FD instructs/writes appt. for 3:45 on slips

Items noted in regard to the approved template:

- 30, 45 and 60 minute time slots are included (these time allotments can be used for therapy sessions, crisis appointments, etc.);
- both am and pm documentation buffers are included, as is a lunch break;
- schedule will be adapted to fit staff members that work a non 8 hour per day schedule;
- clients given an arrival time instead of an appointment time.

As discussed at last week's meeting, the therapist will determine when a client should return for their next appointment and approximately how much time would be needed (i.e. 30 minutes in 3-4 weeks). Front desk staff will then review the therapist's schedule and fill with the appointment that best matches the specific needs of that client.

At next week's meeting, the CCBHC Task Force will begin review of current schedules for RNs and were asked to bring any recommendations or templates for the group. It was noted that future schedules need to be more structured, similar to the new schedules for Outpatient Therapists, and that appointments with RNs need to be utilized for triggering events.

CCBHC Task Force

March 12, 2025

MINUTES

Present: Myron Gargis, Cammy Holland, Dana McCarley, Shelly Pierce, Erica Player and Dianne Simpson

Absent: None

Erica shared with the group that she had taken the scheduling template approved at the last meeting and adapted it to accommodate staff that work 10 hour per day schedules. While 13 appointments would be filled for 8 hour schedules, 10 hour schedules would have 17 appointments.

Following instruction at the last meeting for pertinent staff to maximize the schedules for Outpatient Therapists and to ensure that appointment openings are filled, the group reviewed updated schedules for several Outpatient Therapists. While some improvement has been made, much more effort is needed.

Erica noted that several clients on the Intake Coordinators' caseloads are being transferred to Outpatient Therapists to assist in filling their open appointments. Licensed Intake Coordinators will likely only provide individual therapy for those consumers whose insurance requires it.

All were encouraged to continue monitoring the schedules and working to improve efficiency. Dianne noted a report titled "Unscheduled Hours By Location" that could be accessed and utilized as a tool to monitor openings.

Myron then asked about staff feedback in regard to the upcoming changes with the approved schedule template for Outpatient Therapists. Dana noted that she had spoken with several Jackson County staff about it and felt that, because it is a new mindset on scheduling, it would just take some time for staff to learn and understand the process. Erica commented that she was currently talking with front desk staff about the upcoming changes, but preferred to meet with clinicians on a one-on-one basis. They are aware that changes in scheduling are coming, but have not yet been informed of the details.

In considering future caseloads with the new scheduling template, task force members calculated that approximately 260 would be the goal. With this estimated caseload in mind, Myron recommended that Dana, Erica and Dianne reevaluate the need for any additional Outpatient Therapists.

At some point in the past, the idea of a grouping system (based on need/symptoms) for clients was being evaluated. A recommendation was made to revisit that possibility as it could be beneficial for several reasons, including scheduling.

The group next briefly discussed schedules of prescribers and RNs. Several questions were asked in regard to DEA compliance with prescriptions. Task force members agreed to research info on this topic prior to the next meeting. Schedules for these staff members, along with information on no shows, will be the next focus for the group.

**Continuous Quality Improvement
Monthly Summary Reports
February 20, 2025**

I. Report from Clinical Director, Dianne Simpson:

- **Staff Error Report-** The January report was distributed to the Program Directors/Coordinators.
- **Wall of Fame/Incentive Plan for January 2025:** The following staff achieved the incentive for the month of January. They all exceeded their productivity standard and produced excellent and error free documentation.

Congratulations:

Incentive Plan-

Boxley, Sarah	Dettweiler, Sarah
Brand, Kali	George, Margaret
Brookshire, Tom	Keeper, Christy
Burks, Julie	Robinson, Hannah
Cheek, Brittany	Traweek, Elizebeth

Wall of Fame-

Alford, Lindsay	Marshall	Knott, Stephanie	Marshall
Barrett, Rob	Jackson	Martin, Stephanie	Marshall
Brown, Jennifer	Jackson	Miller, Savannah	Jackson
Burns, April	M. P.	Moore, Leah	Geriatrics
Clonts, Lisa	Marshall	Moses, Mona	Geriatrics
Cooper, Rebecca	Dutton	Quinn, Lindsey	Marshall
DeAtley, Joanna	Residential	Riggins, Jennifer	Marshall
Early-Foster, Alison	Marshall	Richie, Denise	Marshall
Estes, Ashlee	Marshall	Rucker, Elizabeth	Marshall
Floyd, Jessica	Jackson	Scyphers, Patrick	Marshall
Hanna, Sarah	M. P.	Steed, Tyler	Geriatrics
Hardy, Brandon	J. P.	Travis, Samantha	Dutton
Hayes, Leilani	M. P.	Tubbs, Felicia	J. P.
Headrick, Tina	Marshall	Whitworth, Chris	J. P.
Herring, Belinda	Marshall	Wilson, Billy (Ross)	M. P.
Hixon, Ryan	Dutton	Wilson, Justin	Dutton
Holcombe, Mitzi	Geriatrics	Zurita, Marili	Marshall
Holderfield, Alec	Marshall	Bartke, George	Cedar
Johnson, Dallas	Jackson	Crowell, Robert	Cedar
Justice, Desiree	Dutton	Kirkland, Jana	Cedar
Kilian, Zachary	Dutton	Ramsey, Katrina	Cedar
		Sweatman, Susan	Cedar
		Woodham, Cynthia	Cedar

- II. Review and approve of January 16, 2025 summary report:** January minutes were approved as sent out with no changes noted.

**Continuous Quality Improvement
Monthly Summary Reports
February 20, 2025**

III. Administrative Review Summary/Error Reports for Jan 2025: (Dec MTD 1.8 % YTD 0.7):

	Cases Reviewed	Docs Reviewed	Docs w/errors	Total Errors	Predominant Errors
TOTAL	20	3052	23	29	Late notes; wrong service billed; med record not updated

MONTHLY ADMIN REVIEW ERROR RATE: 1.0 % YTD ERROR RATE: 0.7 %

A summary report was sent out to the committee for each program containing details of the errors for review. The breakdown of reviews done for 6 month reviews and other/transfers were submitted for each program. The predominant errors were late notes; wrong service billed and med record not updated. The monthly error rate was slightly lower and the year to date error rate was the same as last month.

IV. State Reporting Data Elements (SRDE) Report for Dec 2024-These errors are reported one month later as they are not received in time to research and compile prior to the CQI review.

Total Errors	Predominant Error Trends
3	Termination date blank

VIII. Prevention Activities: Prevention activity sheets were reviewed for January 2025

Direct Services	# Hours billed in Marshall County	# Hours billed in Jackson County
Block- Community	N/A	N/A
Block-Environmental	36	27
Block- Information Dissemination	40	32
Block-Education	12	21
Block-Alternatives	2	0
Block-PIDR	N/A	20
SOR-Environmental	66	28
SOR-Community Based Process	13	63
Total	169	191

In January, the Prevention team logged a total of 360 billing hours. They participated in the Senior Expo to educate Jackson County's senior citizens, distributing over 400 Deterra pouches and pill case holders. The team also focused on promoting safe storage and disposal practices. Additionally, they set up "Remove the Risk" tables at Section Pharmacy and Bridgeport Drugs.

During the month, staff conducted Narcan training for all Jackson County bus drivers at their monthly meeting, providing 72 Narcan kits afterward. The team also attended the Kids n Kin events in both Marshall and Jackson Counties. In Marshall County Schools, they continued their in-depth classes with students caught vaping.

The Prevention team is currently in the 7th week of delivering the "Too Good for Drugs" program to all 5th grade students at Boaz Intermediate and Woodville Elementary schools. They also set up

**Continuous Quality Improvement
Monthly Summary Reports
February 20, 2025**

"Talk They Hear You" informational tables at local libraries in both counties, offering outreach to parents on how to discuss substance misuse with their children.

IX. Hospital Discharge Follow-up Report for January:

Location	Total
Marshall	8
Jackson	8
Geriatrics	0
Total	16

Tracking reports of hospital discharges and 72 hour follow-ups for clients in Marshall and Jackson County were sent out to the committee. All appointments were kept with the exception of one in Jackson County that was seen on 2/5/25. Children/adolescents still continue to make up a large percentage of these appointment.

X. Incident Prevention and Management for January: There was one allegation of sexual abuse, unsubstantiated; one consumer had a fracture at Dutton Group Home; and one incidence of consumer aggression.

XI. Medication Errors for January: There were 2 medication errors reported for the month of January. Two missed dose. No trends to note.

By Personnel

	MAC	RN	LPN	Pharmacist	Other (explain)
Level 1	2				
Level 2					
Level 3					
TOTAL	2	0	0	0	0

By Division

	MI	SA	TOTAL
Level 1	1	1	2
Level 2			
Level 3			
TOTAL	1	1	2

By Error Type

	Wrong Person	Wrong Med	Wrong Dose	Wrong Route	Wrong Time	Wrong Reason	Wrong Documentation	Missed Dose	Other (explain)
Level 1								2	
Level 2									
Level 3									
TOTAL	0	0	0	0	0	0	0	2	0

XII. Consumer Feedback, Complaints, and Grievances: There was 1 complaint reported for January.

**Continuous Quality Improvement
Monthly Summary Reports
February 20, 2025**

FY25-Consumer Feedback	Jan	Jan	Jan	Jan	Jan
	Compliments	Suggestions	Complaints	Comments	Total per location
Guntersville	1	0	0	1	2
Scottsboro	0	0	0	0	0
Outreach/Residential	0	0	1	0	1
Cedar Lodge	1	0	0	0	1
Total MTD	2	0	1	1	4
Total YTD	10	10	11	6	37

XIII. Residential Services Report for January 2025:

FACILITY	CAPACITY	TARGETED PT DAYS	ACTUAL PT DAYS	% OCCUPANCY
Jackson Place	3	93	93	100
Marshall Place	3	93	93	100
Jackson Place Sup Apt.	2	62	31	50
Dogwood Apartments	8	248	248	100
Supportive Housing	12	372	248	67
MLBH Residential Care	10	310	241	78
MLBH Crisis Stabilization	2	62	62	100
Foster Homes	26	806	799	99
Totals		2046	1815	89

XIV. Treatment Plan Reviews for January 2025:

Programs	Total Charts	Admission Criteria not met	Not Timely	Not Individualized	Documentation Does Not Relate To TP And/or Address Progress	No Attempts of Active Engagement Documented	No Modification for Accommodations	Total Errors
Geriatrics	26	0	0	0	0	0	0	0
Jackson	67	0	6	0	6	0	0	12
Marshall	167	0	13	0	5	0	0	18
Substance Abuse	0	0	0	0	0	0	0	0
Residential	0	0	0	0	0	0	0	0
TOTALS	260	0	19	0	11	0	0	30

Standards 580-2-20-.07 (7) (a):

- (1.) The appropriateness of admission to that program is relative to published admission criteria.
- (2.) Treatment plan is timely.
- (3.) Treatment plan is individualized.
- (4.) Documentation of services is related to the treatment plan and addresses progress toward treatment objectives.
- (5.) There is evidence of attempts to actively engage recipient, family and collateral supports in the treatment process to include linguistic and/or auxiliary support services for people who are deaf, hard of hearing, or limited English proficient as well as any other accommodations for other disabilities.

**Continuous Quality Improvement
Monthly Summary Reports
February 20, 2025**

(6.) Treatment plan modified (if needed) to include linguistic and/or auxiliary support services for people who are deaf, hard of hearing, or limited English proficient as well as any other accommodations for other disabilities.

The committee was sent a breakdown of the clinical data compiled from the Treatment Plan Reviews. A summary report was sent out to the committee for each program. The trends for the month were: treatment plans not timely and documentation does not relate to treatment plan and/or address progress. Staff turnover was the predominant factor in the treatment plans not being updated on time.

XV. Form-Policy & Procedure Revisions/Approvals:

Forms-

- **Sliding Fee Schedule-Rev-1-1-25-** This form was revised due to the changes in the Federal poverty level in January of 2025. The form was added to the server and necessary staff were notified of the changes 1/27/25. The new sliding fee scale #10 was added in Avatar NX and went into effect 1/26/25 with scale #9 ending 1/25/25. The administrative form was emailed to the committee and approved with no changes noted and has been added to the forms manual under the MLBHC forms>Intake forms tab for staff access.

P & P: Procedure revisions for CQI approval-None

P & P: Board Approved Policy Revisions-None

XVI. Miscellaneous Items:

- **Performance Improvement Annual Report for FY2024-**Emailed out with the minutes to the committee as well as all users.

Leadership Committee
February 20, 2025

MINUTES

Present: Lane Black, Myron Gargis, Cammy Holland, Dana McCarley, Shelly Pierce, Erica Player, Gerald Privett, Sherneria Rose and Dianne Simpson

Absent: Katrina Ramsey

I. HR Training Presentation

Lane provided a training presentation titled “Gossip, Have You Heard?”

II. Approve minutes of the January 16, 2025, meeting

Minutes of the January 16, 2025, meeting were distributed to all staff via e-mail. Minutes were approved, as presented.

III. No committee reports for the month

IV. Program Financial Reports: October, 2024 – January, 2025

- YTD net income of \$83,069 (not including Board investments).
- Cammy reminded all LC members on the details of Admin Allocation and Depreciation, explaining how these effect each program’s financial reports.
- **Marshall Co. OP & OR – Net income \$75,959**
- **Jackson Co. OP & OR – Net loss \$44,849**
- **Geriatrics – Net income \$12,476**
- **Residential –**
 - Supervised Apartments – Net income \$9,436
 - EBP Supportive Housing – Net income \$4,872 (program designed to break even)
 - Dutton – Net income \$52,714
 - Jackson Place – Net income \$24,339
 - Marshall Place – Net income \$7,616
- **SU Services – Net loss \$41,888**
- **Prevention Services – Net loss \$17,603**

V. Reports & Program Updates:

- **Executive Director’s Report – Myron Gargis**
 - Myron recently participated in a call regarding the Medicaid Contingency Management Plan. Although this plan has not been utilized to its potential in the past, they would like to continue to contract with us and have implemented some changes. The plan will continue to target adults with Medicaid that also have a substance use diagnosis. For every client that we enroll, they will pay us an administrative fee of \$245 per person, per month. With this in mind, the possibility of a current part-time staff member moving to full-time status and handling the Contingency Management Plan was discussed. If a current part-time staff member can’t be identified, LC members noted the possibility of employing an additional Adult Peer Support Specialist, with a portion of their responsibility being to focus on enrollments in the Contingency Management Plan.
 - A contract has recently been signed with Hill Crest Behavioral Health in Birmingham for placement of involuntary commitments. It was noted that the 16-bed units should be utilized first, but if beds are not available there, Hill Crest will place the individuals and we will pay

them through a pool of funds managed by Wellstone. A zoom meeting will soon be scheduled to review the necessary forms and the placement process.

- Earlier this month, Probate Judge LeCroy and Sheriff Sims convened a meeting of the Marshall County Mental Health Task Force, DMH Commission Boswell and her staff. The group had a detailed discussion related to the shortage of voluntary and involuntary inpatient beds in our region. Commission Boswell noted that if the currently proposed budget for FY26 passes, MLBHC was at the top of the list for a new 16-bed unit. If funding is made available, MLBHC would either construct or purchase a facility for this use.
- Albertville City Schools recently received a \$3.5M grant to expand School Based Mental Health services. ACS has committed to contracting with MLBHC for one additional master's level therapist and there is a possibility that two more positions could be added in the future.
- Myron noted the need to develop a CCBHC Task Force. This group will meet weekly from now until July. Core members include Myron, Dianne, Erica, Dana Mc, Cammy and Shelly. Others may possibly be added to this group, as needed, to address specific topics. These approximate one hour meetings will be held at the Admin Office on Wednesdays at 10:00 am, beginning next week (2/26).
- **Clinical Director's Report – Dianne Simpson**
 - Dianne reminded all that we are recruiting for a Crisis Coordinator and would ideally like to have an internal candidate. This position does require a master's degree.
- **Administrative Services – Cammy Holland**
 - The next payroll requires a quick processing time. The time period ends on 2/25 and payroll must be finalized and submitted by 2/26.
 - FEI is currently set to go live on 4/1.
 - There have been some issues with Prior Authorizations (PAs) for HICC and LICC.
- **HR Report – Lane Black**
 - The listing of vacant positions was shared with LC members. Please advise Lane of any discrepancies.
 - DMH continues to track interviewing as a means to evaluate the difficulties in hiring. Lane will continue to send email reminders of this task, as it is a requirement.
- **Jackson County – Dana McCarley**
 - Several JC staff members have been out sick.
 - Shaquitta Sabb has transferred from SB MH TH to OP TH.
 - Amanda Whitley has started covering both Scottsboro City and JC schools.
 - One of the new OP TH, Kylie Evans, is providing therapeutic coverage for ACT clients.
 - Rachele Hampton is at full pace with intake coverage.
 - Kimberly Smith, new SB TH, will be doing intakes for both Scottsboro City and JC schools.
 - Melissa Blanks, CPS-P, has resigned effective February 28th.
 - Dana is on the Board of Directors for the JC Children's Policy Council. They are planning some great fundraisers that will be announced soon.
 - An office plan for the Hwy 35 facility has been finalized, with all staff excited to move to the new building.
- **Marshall County OP & OR – Erica Player**
 - Erica recently calculated December and January revenues for both SB and OP TH positions. She did this to demonstrate to staff their work performance from the standpoint of a dollar amount. She plans to also do this in the near future with CM positions.
- **Geriatrics – Gerald Privett**
 - Myron, Dianne and Gerald recently met to discuss changing staffing patterns in contracted facilities from a Therapist/Geriatric Specialist model to a Therapist/Peer Support model.

The thought is this updated staffing pattern would be more effective and services would also be classified as a triggering event.

- Gerald noted the possibility of again contracting with Attalla, McGuffey and Barfield.
- **Residential – Sherneria Rose**
 - Recruitment continues with all residential programs. Unfortunately, no shows for interviews also continue.
 - Screenings on several recent consumers have been determined inappropriate for residential placement with MLBHC. This has not been a popular response, with a few requests to re-screen certain consumers. Myron advised that on any consumers that do not meet admission criteria or that do meet exclusion criteria, the placement denial should be linked directly to the Policy and Procedure/Program Description and that specific documentation attached to the denial.
- **SA Services – Katrina Ramsey**
 - No report for today due to Katrina’s absence.

VI. Review of wait times

For January, 2025, the following wait times were reported:

MC Intake	10 days	MC MD/CRNP	12 days
JC Intake	10 days	JC MD/CRNP	10 days
Average	10 days	Average	11 days

VII. Unfinished Business

- **None noted**

VIII. New Business

- **None noted**

IX. Adjournment

The Leadership Committee meeting was adjourned at 3:40 p.m.



New Directions 2025

Oh, March!
The month where
flip-flops meet
snow boots.



March Birthdays

Kimberly McMurrey	March 2
Vanessa Vandergriff	March 5
Hannah Bishop	March 6
Kim Garmon	March 6
Lilly Strange	March 18
Debbie Burnett	March 23
Bob Crowell	March 23
Kim Coe	March 27



March Anniversaries

Britany Brown	1 year
Brittany Burkhalter	1 year
April Burns	1 year
Jessica Floyd	1 year
Bri McDonald	1 year
Hannah Robinson	1 year
Susan Sweatman	1 year
Rob Barrett	2 years
Shaquitta Sabb	2 years
Sarah Dettweiler	3 years
☺ Loyalty Bonus	\$100
Lindsey Quinn	3 years
☺ Loyalty Bonus	\$100
Elizebeth Traweek	4 years
Nancy Paschal	7 years
☺ Loyalty Bonus	\$300
Jennifer Brown	9 years
Teana Campbell	13 years
Cammy Holland	17 years
Kim Coe	19 years



Hockey Game

MLBHC staff recently received an email from the EEG related to the next company sponsored event. On Saturday, March 22, employees have the opportunity to attend a Huntsville Havoc Hockey Game. Staff members that register with Jeremy Burrage by the deadline of March 3, 2025, will be treated to a hockey game and food for themselves and one guest.



Daylight Saving
Time begins on
Sunday,
March 9th

**As published in *The Advertiser Glean*
February 19, 2025**

**A conversation
on mental health**

By Claudette DeMuth
Marshall Medical

On Friday, February 7, Marshall Medical Centers hosted a productive meeting focused on improving mental health services in Marshall County.

Bringing together such a diverse group of stakeholders

– like state mental health officials, law enforcement, healthcare providers and local legislators – can be an effective way to address the mental health challenges the community faces. Collaboration between these groups could lead to better resource allocation, streamlined services and a more integrated approach to care.

“We appreciate the opportunity to meet with

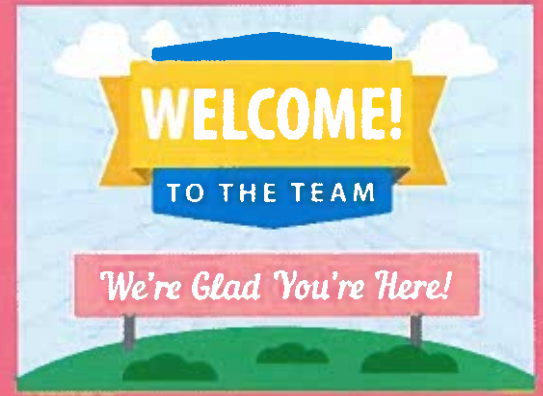
the team of individuals who are currently addressing the mental health challenges in Marshall County. The quality of care currently being delivered is excellent – and – we look forward to supporting whatever we can do at the State level to bring improvements to this area of need.” stated Kim Boswell, Commissioner of the Alabama Department of Mental Health.



It was a round table type discussion for the group looking into improving mental health services in the county.



A large group got together last week to talk about mental health services in Marshall County. Pictured are 1st Row: Casey Baugh, Social Worker, Marshall Medical Centers – Audra Ford, RN, Director of Emergency Services, Marshall Medical Centers – Traci Stewart, Chief Operating Officer, Marshall Medical Centers – Senator Wes Kitchens, District 9 – Representative Brock Colvin, District 26 – Kim Boswell, Commissioner Alabama Department of Mental Health – Representative Jeana Ross, District 27 – Andrea LeCroy, Marshall County Probate Judge – April Gentry, Director of Case Management, Marshall Medical Centers – Leah Jones, RN, Nurse Manager, Marshall Medical Centers Behavioral Health Unit – Brittany Fricks, Case Management, Marshall Medical Centers; and 2nd Row, Tammy Jennings, RN, Director of Acute Care, Marshall Medical Centers, Kathy Woodruff, Chief Nursing Officer, Marshall Medical Centers – Bill Smith, Executive Director of Operations, Marshall Medical Centers – Myron Gargis, Executive Director, Mountain Lakes Behavioral Healthcare – Dr. Greg Ciaccio, Behavioral Health / Psychiatric Care, Marshall Medical Centers – John Young, Marshall County Investigator – Brandy Rainis, Marshall County Probate Clerk – Jeremy Barrage, Marshall County Mental Health Officer – and Phil Sims, Marshall County Sheriff.



The individuals photographed below are new employees that completed orientation since the last newsletter.



Amanda Eddings is a Life Skills Specialist at Cedar Lodge.

Rachelle Hampton, LICSW, is an Intake Coordinator for Jackson County. If Rachelle looks familiar, it's because she previously worked for MLBHC as a JC School-Based Therapist.



Miranda Hambrick is a LSS at the Dutton Residential Facility.



IMPORTANT

Personnel Policy Spotlight



IMPORTANT

4.1.2 Equal Employment Opportunity

Equal Employment Opportunity has been and will continue to be, a fundamental principle of MLBHC, where employment is based upon personal capabilities and qualifications without discrimination because of race, color, religion, sex, age, national origin, disability, or any other protected characteristic as established by law. We value each employee's talents, and support an environment that is inclusive and respectful. This policy of Equal Employment Opportunity applies to all policies related to recruitment and hiring, compensation, benefits, termination and all other terms and conditions of employment.



Below are a few quotes that were recently shared in regard to MLBHC staff and/or services:

Bri McDonald - Certified Peer Support - Youth

Anonymous source: "I have been so beyond impressed with Bree and the way she works with her clients. Her care for them shows through, and she is always working so hard to help them in any way she can. I really appreciate that she updates me on our mutual people and advocates for them. She is really a huge asset to our team!"

School Based Mental Health Services

Scottsboro High School Principal: "We appreciate MLBHC so much. We love having the services in our school system. We have such a need for mental health. It takes a village to take care of these kids, and we are glad ya'll are a part of the village."



If you would like to have an article/photo/etc published in New Directions, please e-mail it to Shelly Pierce by the 20th of each month for the next month's publication. Make certain that your submission does not refer to a consumer by name or include any other type of identifying information. If so, you must submit an "Informed Consent" form specific to each item.



Wall of Fame

January 2025 I = Incentive



Marshall OP & OR

Lindsay Alford
Kali Brand (I)
Julie Burks (I)
Lisa Clonts
Ali Early-Foster
Ashlee Estes
Tina Headrick
Belinda Herring
Alec Holderfield
Christy Keeper (I)
Stephanie Knott
Stephanie Martin
Lindsey Quinn
Jennifer Riggins
Denise Ritchie
Elizabeth Rucker
Patrick Scyphers
Elizebeth Traweek (I)
Marili Zurita

Jackson OP & OR

Rob Barrett
Tom Brookshire (I)
Jennifer Brown
Brittany Cheek (I)
Sarah Dettweiler (I)
Jessica Floyd
Dallas Johnson
Savannah Miller
Hannah Robinson (I)

Substance Use

George Bartke
Bob Crowell
Jana Kirkland
Katrina Ramsey
Susan Sweatman
Cindy Woodham

Multi Programs

Sarah Boxley (I)
Margaret George (I)

Residential

April Burns
Rebecca Cooper
Joanna DeAtley
Sarah Hanna
Brandon Hardy
Leilani Hayes
Ryan Hixon
Desiree Justice
Zach Kilian
Samantha Travis
Felicia Tubbs
Chris Whitworth
Justin Wilson
Ross Wilson

Geriatrics

Mitzi Holcombe
Leah Moore
Mona Moses
Tyler Steed



Monday, March 3

Human Rights Committee
Cedar Lodge - 5:00 pm

Tuesday, March 18

Board work session/meeting
Admin Office - 4:30 pm

Tues - Fri, March 18-21

ASADS Conference
Bryant Conference Center
Tuscaloosa

Thursday, March 20

Career Fair
A&M University - Huntsville

Saturday, March 22

Huntsville Havoc Hockey Game
Von Braun Center - Propst Arena
Huntsville

Thursday, March 27

Leadership Committee
Admin Office - 1:00 pm



MLBHC continues to partner with Sand Mountain Park and Amphitheater in Albertville to sponsor The Miracle Field. The Miracle Field was founded with the belief that every individual deserves a chance to play baseball. The mission of Miracle League is to provide that opportunity to all, regardless of their abilities. Through the design of facilities that meet the unique needs of Miracle League players, they experience the joy that comes from playing our national pastime - baseball.

Miracle League is now recruiting volunteers (buddies) to assist with ballgames for the nearly 200 special needs individuals that have registered to play this year. Several MLBHC staff members have signed up to again volunteer as a buddy for the coming season. (They enjoyed it so much last year that there going back for more!) Buddies are volunteers who work with the athletes to ensure their experience in the Miracle League is as special as they deserve it to be.

At the present time, the league still needs many more volunteers. Please consider donating some of your time to participate with these amazing players and coaches.

Important details:

- All games are held at the Sand Mountain Park in Albertville.
- The spring season runs during April and May, with games held on Tuesday and/or Thursday of each week.
- Buddies may sign up to be fill-in (as needed) or may commit to volunteering for all games during the spring season.
- Buddies must be 12 years of age or older.
- Registration does include a background check.

To register, please visit

<https://sandmountainpark.recdesk.com/Community/Program?category=35>

For more information or any questions, please contact:

Lisa Hansford

Sport Programming Coordinator

Sand Mountain Park and Amphitheater

lhansford@sportsfacilities.com

256-891-8240

Staff to attend ASADS Conference



Several MLBHC staff members will soon attend the 49th Annual Alabama School of Alcohol and Other Drug Studies (ASADS) Conference at the Bryant Conference Center in Tuscaloosa. ASADS is designed to meet the continuing educational needs of professionals involved in the enforcement, prevention, identification, assessment, treatment and rehabilitation of chemical dependency. MLBHC staff look forward to this conference each year as it always offers excellent presenters and a wide range of topics related to substance use issues.

Employee Spotlight **Krissy Wood**



I have been blessed to be a part of MLBHC for almost 7 years. I am a Secretary/LSS at the Guntersville office. I love my job, and the people that I get to work with every day. It is so rewarding to be able to see the changes that take place in the lives of our clients on a daily basis.

I have many hobbies...too many to list! I love painting, fixing things, building things, doing anything artsy or crafty! Spending time with family and friends, traveling to the beach, or to Auburn would definitely be on the list. WAR EAGLE! This year...I hope to get to visit my son, Jake in Chicago!

*"Never let anyone steal your
JOY"*