

fello.



Annual Budget Sheets & Best Practices

FMCS Fees

The Fiscal Management and Counseling Services (FMCS) fee for Fello increases every year on July 1.

As of November 2025, the FMCS fee is \$215.17 per month.

July 2022- June 2023	July 2024- June 2024	July 2024- June 2025	July 2025- June 2026	July 2026- June 2027
\$200/month	\$205/month	\$210.1/month	\$215.17/month	\$220/month

FMCS Fee Schedule

Annual Month	\$215.17	\$220
January	6 months	6 months
February	5 months	7 months
March	4 months	8 months
April	3 months	9 months
May	2 months	10 months
June	1 month	11 months
July	12 months	-
August	11 months	1 month
September	10 months	2 months
October	9 months	3 months
November	8 months	4 months
December	7 months	5 months

Writing the FMCS Fee – Example 1

Person-Centered Plan Status: Initial, Annual, Revised, or Financial Management and Counseling Services Provider Change					
Annual PCP					
Name:	<u>Sample</u>	Effective Date:	<u>11/19/2025</u>	Annual Plan Date:	<u>11/19/2025</u>
	Number of Months Left in Plan:	<u>12.00</u>	Number of Weeks Left in Plan:	<u>52.143</u>	
Version 10/20/25					
Add any general notes that may be helpful for the team or Financial Management and Counseling Services provider as needed					
Financial Management and Counseling Service (Required to Self-Direct)					
The Financial Management and Counseling Service is a service that is now a part of your budget. Choose from the Approved Financial Management and Counseling Service providers and include the rate per month provided by the Financial Management and Counseling Service provider. If the provider's fees change in the middle of the year, include the rates in the two rows.	Chosen Financial Management and Counseling Services Provider	Rate per Month	# of Months	Budget Total	Notes
	Fello (formerly The Arc Central Chesapeake Region)	\$215.17	8.00	\$1,721.36	The SDS Budget Sheet must not exceed Approved DDA Budget Allocation. The turn red if you exceed your allocated b
		\$220.00	4.00	\$880.00	• Unallocated funding may be accessed using a budget modification form as p

This screenshot shows the Financial Management and Counseling Service section of the Budget Sheet. It shows a rate of \$215.17 for 8 months and a rate of \$220 for 4 months. The Annual Plan Date for this sheet is 11/19/2025.

All 12 months of the year are accounted for (8 months at \$215.17 plus 4 months at \$220). It uses the appropriate rates for the months the Budget Sheet covers (November 19, 2025-November 18, 2026).

Writing the FMCS Fee – Example 2

Person-Centered Plan Status: Initial, Annual, Revised, or Financial Management and Counseling Services Provider Change					Annual PCP
Name:	Sample	Effective Date:	7/1/2025	Annual Plan Date:	7/1/2025
Number of Months Left in Plan:	12.00	Number of Weeks Left in Plan:	52.143		
Version 10/20/25					
Add any general notes that may be helpful for the team or Financial Management and Counseling Services provider as needed					
Financial Management and Counseling Service (Required to Self-Direct)					
<p>The Financial Management and Counseling Service is a service that is now a part of your budget. Choose from the Approved Financial Management and Counseling Service providers and include the rate per month provided by the Financial Management and Counseling Service provider. If the provider's fees change in the middle of the year, include the rates in the two rows.</p>	Chosen Financial Management and Counseling Services Provider	Rate per Month	# of Months	Budget Total	<p>Notes The SDS Budget Sheet must not exceed Approved DDA Budget Allocation. The turn red if you exceed your allocated b</p> <ul style="list-style-type: none"> Unallocated funding may be accessed using a budget modification form as pe
	Fello (formerly The Arc Central Chesapeake Region)	\$215.17	12.00	\$2,582.04	

This screenshot shows the Financial Management and Counseling Service section of the Budget Sheet. It shows a rate of \$215.17 for 12 months. The Annual Plan Date for this sheet is 7/1/2025.

All 12 months of the year are accounted for (12 months at \$215.17). It uses the appropriate rate for the months the Budget Sheet covers (July 1, 2025-June 30, 2026).

DDA Budget Allocation

The total Person-Centered Plan (PCP) budget allocation from the approved PCP is entered into the box next to the red arrow.

As items are added to the budget sheet, the middle box calculates the Self-Directed Services Budget Total.

The third box subtracts the SDS Budget Total from the DDA Budget Allocation amount to generate the Unallocated funds.

SELF-DIRECTED SERVICES - BUDGET SHEET Developmental Disabilities Administration		<input type="text"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
			<i>Self-Directed Services Budget Total</i>	<i>Unallocated Funds</i>

Important Notes About Budget Dates

Budget Sheet Dates

The Effective Date on the budget sheets must match the Effective Date of the PCP.

The Annual Plan Date (APD) on the budget sheet is the date the Annual PCP begins. The Annual PCP Date on the PCP is NOT the same as the Annual Plan Date on the Budget Sheet.



Important Notes About Budget Dates

Weeks & Months Remaining

The budget sheet counts the number of weeks and months in a plan based on the dates entered.

There are 52.143 weeks in a year.

$365 \text{ days} \div 7 = 52.143 \text{ weeks}$

52.140 weeks will not calculate the same funding as 52.143 weeks.



Examples of Incorrect Date Formats

When dates are entered incorrectly, fields will not be populated correctly.

In the screenshots below, dates are entered using periods instead of slashes (7.1.25 instead of 7/1/2025) and ranges of dates are being entered instead of single dates.

These create the error “#VALUE!” in the Number of Months Left in Plan section and “#####” in the Number of Weeks Left in Plan section.

Person-Centered Plan Status: Initial, Annual, Revised, or Financial Management and Counseling Services Provider Change			Annual PCP		
Name:	Sample	Effective Date:	7/1/2025 - 6/30/2026	Annual Plan Date:	7/1/2025
Number of Months Left in Plan:	#VALUE!	Number of Weeks Left in Plan:	#####		

Person-Centered Plan Status: Initial, Annual, Revised, or Financial Management and Counseling Services Provider Change			Annual PCP		
Name:	Sample	Effective Date:	7.1.2025	Annual Plan Date:	7.1.2025
Number of Months Left in Plan:	#VALUE!	Number of Weeks Left in Plan:	#####		

Version 10/20/25

Example of Correct Date Formats

When dates are entered correctly, they are written as MM/DD/YYYY or M/D/YYYY.

		Person-Centered Plan Status: Initial, Annual, Revised, or Financial Management and Counseling Services Provider Change	Annual PCP
Name:	<u>Sample</u>	Effective Date: <u>7/1/2025</u>	Annual Plan Date: <u>7/1/2025</u>
Number of Months Left in Plan:	<u>12.00</u>	Number of Weeks Left in Plan: <u>52.143</u>	

Formulas

LTSS calculates funding in 15-minute increments for most services. These increments are called units.

The FMCS's Budget Review Team converts the units into hours per week.

Units to Hours Formula

Units \div 4 = Hours

2088 units \div 4 = 522 hours

Hours to Weeks Formula

Hours \div Weeks = hours per weeks

522 hours \div 52.143 weeks = 10 hours per week, for 52.143 weeks

Unit Conversion

The screenshot on this slide shows the number of units of Personal Supports per month from November to November on a Budget Sheet, with a total of 2,088 units and an Annual Service Cost of \$26,141.76.

The dollar amount does not need to match the PCP (except for Upper Pay Limit Services). The number of hours must match the PCP.

Service and Provider	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Total Units	Annual Service Cost
Personal Supports	40	168	184	168	168	176	184	160	184	176	168	184	128	2088	\$26,141.76
Scope: Services and supports are based on the approved waiver service scope and requirements as outlined in the provider implementation plan, HRST, nursing care plan														Frequency: Weekly	



Best Practices

Budget sheets must be submitted by individuals not receiving payment from the budget. Best practice is for the **CCS to submit the budget sheets.**

Review the Participant Dashboard in FMSE for usages during development of the budget sheets, especially if the PCP is late or working on a Revised PCP Budget Sheet.

Use the **current version of Budget Sheet**, which is available on DDA's website.

Questions?

