



Mental Health Advisory Council (MHAC) Meeting Materials

FY 2023, Quarter 2

Prepared for the
Mental Health Advisory Council (MHAC) Meeting
May 17, 2023

Equality Through Advocacy

The Protection and Advocacy System for the State of Indiana

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Table of Contents

Executive Session Agenda	Page 3
Public Meeting Agenda	Page 4
Executive Session Minutes – February 15, 2023	Page 6
Public Meeting Minutes – February 15, 2023	Page 7
Quarterly Report	Page 9
Finance Report	Page 36
Indiana General Assembly 2023 Session	Page 40



**Indiana Protection & Advocacy Services Commission
Indiana Disability Rights
4755 Kingsway Dr., Suite 100
Indianapolis, IN 46205**

**MHAC Executive Session
Wednesday, May 17, 2023 – 12:00-12:30 pm, EST**

AGENDA

- I. Receive information about prospective appointees (Indiana Code 5-14-1.5-6.1(b)(5))
 - a. Chelsea Puckett
 - b. Leslie Stevens
- II. Discussion of strategy with respect to litigation (Indiana Code 5-14-1.5-6.1(b)(2)(B))

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Indiana Protection & Advocacy Services Commission
Indiana Disability Rights
4755 Kingsway Dr., Suite 100
Indianapolis, IN 46205

Mental Health Advisory Council (MHAC)
Public Meeting – Wednesday, May 17, 2023 – 12:30pm, EST

AGENDA

- I. Call to Order
- II. Changes to Agenda, if any
- III. Approval of MHAC Minutes* from February 15, 2023
- IV. MHAC Membership and Terms*
 - a. Members with terms expiring:
 - i. Samantha Brinkman – term ends May 30, 2023
 - ii. J'Andra Antisdell – term ends August 30, 2023
 - b. Two pending applications*
 - i. Chelsea Puckett
 - ii. Leslie Stevens
 - c. SAMHSA/PAIMI Membership Requirements
 - d. Officer Elections* - Officer term starts June 1, 2023
 - i. Chair
 - ii. Vice Chair
- V. IDR Executive Director Report: M. Keyes
 - a. Quarterly Report (handout)
 - b. Fiscal Report (handout)
- VI. Old Business:
 - a. Indiana General Assembly 2023 Session Wrap-Up
 - b. FFY 2024 Priorities and Objectives* for Public Comment; planning for FFY 2025-2027 P&Os
- VII. New Business
 - a. Voting Survey Discussion (K. Dulaney)
- VIII. Comments, announcements, other business
- IX. Next Meeting Date: August 16, 2023 (virtual)
- X. Meeting Adjourned

***Voting Items**

###

Join Zoom Meeting

<https://us06web.zoom.us/j/85109498550?pwd=Nzc2L2U3Mk9PeURwZS9ISHkzeTkyQT09>

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**MHAC Executive Session
Wednesday, February 15, 2023 – 12:00 pm**

MINUTES

An Executive Session was held on Wednesday, February 15, 2023. No topics were discussed other than those identified on the meeting agenda.

#####

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Indiana Protection & Advocacy Services Commission
Indiana Disability Rights
4755 Kingsway Dr., Suite 100
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Mental Health Advisory Council (MHAC)
Wednesday, February 15, 2023
Virtual Public Meeting – 12:30pm (ET)

Minutes

Attendees: K. Wilds, S. Brinkman, N. Beeman-Cadwallader, J. Griffin, T. Oakerson,
J. Antisdel, J. Loop-Miller, R. Vilensky

IDR

Attendees: M. Keyes, K. Dulaney, D. Morris

Guests: C. Thomas, S. Moore, S. Bahler (Prospective Council Members)

I. **Call to Order:** Meeting was called to order by J. Griffin at 12:32pm (ET). M. Keyes stated that there are enough members present for a quorum. Meeting attendees and guests introduced themselves.

II. **No changes to the agenda were noted.**

III. **Approval of 11/30/22 meeting minutes:** S. Brinkman motioned to accept the 11/30/22 meeting minutes. R. Vilensky seconded the motion. Motion carried by unanimous voice vote approving the minutes from the November 2022 MHAC meeting.

IV. **MHAC Membership and Terms:** The three prospective members shared with attendees their reason(s) for wanting to serve on the MHAC. Afterwards, motions were made and seconded to approve; motions carried by unanimous voice vote, the appointments of C. Thomas, S. Moore, and S. Bahler to MHAC, effective immediately.

M. Keyes discussed the PAIMI guidelines for council membership. Additionally, MHAC terms will be ending for two members, S. Brinkman (end of May) and J. Antisdel (end of August).

V. **IDR Executive Director Report:** M. Keyes provided a summary of the quarterly report and the financial report.

VI. **Old Business – Commission Strategic Plan:** No new update provided.

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VII. New Business:

a. IDR's Prison Monitoring Project (K. Dulaney) – MHAC members discussed the preliminary results of IDR's prison monitoring project to provide feedback and recommendations for further work by IDR in this area.

b. Indiana General Assembly 2023 Session (M. Keyes) – M. Keyes provided a summary of the Bill Summary Report. MHAC members were encouraged to contact M, Keyes with any questions or concerns about legislation monitoring.

c. FFY 2024 P&O Update – IDR will begin planning for it's FFY 2024 Priorities and Objectives. This is the final year of the three-year P&O cycle so feedback on new priorities or projects for consideration will be included in discussions starting in the fall of 2023.

VIII. Comments, announcements, other business – J. Griffin encouraged MHAC members to reach out to IDR about training opportunities that are related to IDR's mission.

IX. Next Meeting Date: **Wednesday, May 17, 2023 @ 12:30pm.**

X. Meeting Adjourned: J. Griffin motioned that the meeting be adjourned; R. Vilensky seconded the motion. Motion carried by unanimous voice vote. Meeting was adjourned at 2:03pm (ET).

#####



Quarterly Report

FY 2023, Quarter 2

Prepared for the
Mental Health Advisory Council (MHAC) Meeting
May 17, 2023

and

Indiana Protection and Advocacy Services (IPAS)
Commission Meeting
May 19, 2023

Equity Through Advocacy

The Protection and Advocacy System for the State of Indiana



Table of Contents

Executive Director's Report	4
Key Updates	4
GOAL 1: IDR will comply with all state and federal reporting and financial processes...	4
GOAL 2: IDR will leverage opportunities to increase its capacity.....	4
GOAL 3: IDR will ensure its policies and processes are equitable, transparent, and accessible.	5
Diversity, Equity, and Inclusion Report	6
Goal 1: IDR will provide services to more people with disabilities from black, indigenous, and communities of color.....	6
Goal 2: IDR staff, the IPAS Commission, and MHAC membership will reflect the broad diversity of Indiana.	6
Goal 3: IDR will strengthen its relationships with advocates and organizations led by people with disabilities, people from marginalized communities, and people with lived experiences.....	6
Client Demographics	7
Priorities and Objectives Report	9
Goal 1: Preventing, finding, and stopping abuse, neglect, and exploitation of persons with disabilities.....	9
1.1. Investigate facilities serving children with disabilities.	9
1.2. Investigate or monitor for suspected abuse, neglect, exploitation, and rights violations in facilities or by a service provider.....	9
Goal 2: Breaking down barriers to ensure rights are respected and supports are available for persons with disabilities to participate in an equitable and inclusive society.....	13
2.1. Advocate on behalf of individuals with disabilities in the areas of abuse and neglect, civil rights, discharge from institutions, education, employment, health care, justice, self-determination, and voting.....	13
2.2. Advocate for ending sheltered workshops and increasing competitive integrated employment.....	16
2.3. Advocate for access to Home and Community-Based Services (HCBS).....	16



2.4. Advocate for the expansion of knowledge and use of supported decision-making/less restrictive alternatives to guardianship.	17
2.5. Advocate to ensure elections are accessible to voters with disabilities.	19
Goal 3: Serving as a partner in rights issues by supporting individuals and organizations led by people with disabilities, those from marginalized communities, and people with lived experiences.	21
3.1. Provide easily accessible and equitable paths for the public to contact IDR for advocacy needs and to find information, referrals, and resources.	21
3.2. Support the legislative and policy work and meaningful inclusion of people with disabilities, those from marginalized communities, and people with lived experiences on issues that align with IDR’s mission, vision, and values.....	22
Active Workgroups	23
Acronyms	25
List of Common Acronyms	25
IDR Teams	27
IDR Staff	27
Grant Programs	27
State Hospitals.....	27



Executive Director's Report

Key Updates

- Bonnie Bomer received the Kirles/Byrnett Consumer Advocacy Award from INAPSE. This award recognizes outstanding community employment advocacy efforts in Indiana by and for individuals with disabilities.
- IDR RepPayee reviewers were recently commended by representatives of NDRN, who serve as IDR's liaison to SSA. It was reported that IDR reviewers' recent RepPayee case submissions have greatly improved in quality. More referrals have been provided and there has been a greater depth in explanation of issues and deficiencies.
- IDR has hired 2 summer interns, a Legal Intern and a Special Projects Intern. Both will begin in late May and serve IDR through the Governor's Summer Internship program.
- IDR mourns the passing of [Steve Estes](#) who served IDR as an advocate and investigator since 2016. Previously, Steve served the P&A network holding roles at Disability Rights Florida and Equip for Equality.

GOAL 1: IDR WILL COMPLY WITH ALL STATE AND FEDERAL REPORTING AND FINANCIAL PROCESSES.

- Please see the Fiscal Report for information on current grant balances and expenses.
- IDR completed all required federal and state quarterly reports. IDR meets regularly with all federal funding agencies.
- IDR timely completed requests from federal funders for information.
- IDR timely completed federal draws.
- IDR is working on the 2024 Rep Payee application to start a new 5-year cycle.

GOAL 2: IDR WILL LEVERAGE OPPORTUNITIES TO INCREASE ITS CAPACITY.

- IDR reviewed state and federal grant opportunities. There were no funding opportunities this quarter that fit within IDR's mission.
- IDR is working with partners to find additional opportunities to support our Disability Law Fellowship. IDR is currently accepting applications for this program.
- IDR is again utilizing the summer intern program to support the work that IDR is doing. IDR will host one undergraduate and one law student intern this summer.
- IDR is working with the state to address the state's compensation study results to better understand the full impact to IDR's budget.



GOAL 3: IDR WILL ENSURE ITS POLICIES AND PROCESSES ARE EQUITABLE, TRANSPARENT, AND ACCESSIBLE.

- IDR's website redesign is complete. IDR is now focusing on reviewing materials available on the website as well as developing a plan to enhance self-advocacy resources.
- The DCC Workgroup discussed the need for food inclusivity guidelines, which have been drafted.
- IDR participated in the state agency pulse survey that looks at employee satisfaction and engagement. IDR again ranked 3rd out of all state agencies with our staff reporting high satisfaction and engagement.
- IDR revised its all staff meeting to focus on small group discussion and collaboration.
- IDR's Executive Director, at staff request, resumed providing monthly all-staff updates and staff recognition.
- IDR's Executive Director responded to 3 appeals in Q2. None of the appeals requested Commission review.
- IDR's Executive Director met with the Governor's Office for Inclusion to discuss state employee climate survey results. IDR scored above average in all categories including flexibility, employee engagement, and diversity indices.
- IDR staff timely completed the state's employee performance review process as well as development of goals for 2023.

GOAL 4: EXECUTIVE DIRECTOR WILL SUPPORT IMPLEMENTATION OF THE COMMISSION'S STRATEGIC PLAN AND AGENCY PRIORITIES AND OBJECTIVES.

- IDR's ED supports the staff, Commission, and MHAC through direct supervision and technical assistance, connections to community resources, and facilitating access to programmatic needs.
- Project-specific updates involving the ED are included in the Priorities and Objectives report.
- ED reviewed plan for FFY 2024 P&O process and start of planning for FFY 2025-2027 cycle. ED is working with DD Act partners to collaborate on gathering information for P&O development.



Diversity, Equity, and Inclusion Report

GOAL 1: IDR WILL PROVIDE SERVICES TO MORE PEOPLE WITH DISABILITIES FROM BLACK, INDIGENOUS, AND COMMUNITIES OF COLOR.

- IDR ED joined the ISBA Diversity CLE committee.
- IDR staff are reviewing current connections to help inform the development of a DEI focused outreach plan.
- IDR ED connected with several neighborhood Community Centers to provide introductory information.
- IDR staff provided with DEI related training opportunities.
- PSP Team Staff are completing a four-part series through the Disability Employment TA Center, “Engaging Diverse Communities: Implications for Competitive, Integrated Employment.”

GOAL 2: IDR STAFF, THE IPAS COMMISSION, AND MHAC MEMBERSHIP WILL REFLECT THE BROAD DIVERSITY OF INDIANA.

- IDR is working with the Governor’s Office of Equity and Diversity to provide DEI related training opportunities for staff and Commission/MHAC members.
- IDR received several applications for Commission and MHAC membership.
- IDR does not currently have any staff openings.

GOAL 3: IDR WILL STRENGTHEN ITS RELATIONSHIPS WITH ADVOCATES AND ORGANIZATIONS LED BY PEOPLE WITH DISABILITIES, PEOPLE FROM MARGINALIZED COMMUNITIES, AND PEOPLE WITH LIVED EXPERIENCES.

- IDR will utilize summer interns to assist with coordinating and organizing IDR’s outreach efforts for better reporting and strategic outreach efforts.
- Outcomes from IDR’s participation on various workgroups are discussed in the Priorities and Objectives report. A full list of workgroups is available in the appendix.



Client Demographics

Hispanic Ethnicity Demographics

	Q1 Count	Q1 Percent	Q2 Count	Q2 Percent	Q3 Count	Q3 Percent	Q4 Count	Q4 Percent	Total Count	Total Percent
Hispanic	7	4%	6	3%					13	3%
Not Hispanic	178	94%	197	92%					375	93%
Unknown	5	2%	10	5%					15	4%
Total	190		213						403	

Figure 1 – Client Hispanic Ethnicity Demographics

Gender/Sex Demographics

	Q1 Count	Q1 Percent	Q2 Count	Q2 Percent	Q3 Count	Q3 Percent	Q4 Count	Q4 Percent	Total Count	Total Percent
Female	79	42%	92	43%					171	42%
Male	107	56%	114	54%					221	55%
Other	0	0%	0	0%					0	0%
Unknown	0	0%	7	3%					7	2%
Blank	4	2%	0	0%					4	1%
Total	190		213						403	

Figure 2 – Client Gender/Sex Demographics



Race Demographics

	Q1 Count	Q1 Percent	Q2 Count	Q2 Percent	Q3 Count	Q3 Percent	Q4 Count	Q4 Percent	Total Count	Total Percent
Asian	2	1%	3	1%					5	1%
Black/African American	30	16%	33	15%					63	16%
Race Unknown	0	0%	0	0%					0	0%
White	143	75%	158	75%					301	75%
Blank	4	2%	8	4%					12	3%
Two or More Races	10	5%	8	4%					18	4%
Native Hawaiian/Other Pacific	0	0%	1	0%					1	0%
American Indian/ Alaskan Native/ Indigenous	0	0%	0	0%					0	0%
Unknown-Declined	1	1%	2	1%					3	1%
Total	190		213						403	

Figure 3 – Client Race Demographics

Age Demographics

	Q1 Count	Q1 Percent	Q2 Count	Q2 Percent	Q3 Count	Q3 Percent	Q4 Count	Q4 Percent	Total Count	Total Percent
1 to 3	2	1%	4	2%					6	1%
4 to 10	15	8%	21	10%					36	9%
11 to 21	46	24%	51	24%					97	24%
22 to 40	44	23%	51	24%					95	24%
41 to 65	62	33%	69	33%					131	33%
66 to 80	14	7%	11	5%					25	6%
81 and above	3	2%	3	1%					6	1%
Blank	4	2%	2	1%					6	1%
Data errors	0	0%	1	0%					1	0%
Total	190		213						403	

Figure 4 – Client Age Demographics



Priorities and Objectives Report

GOAL 1: PREVENTING, FINDING, AND STOPPING ABUSE, NEGLECT, AND EXPLOITATION OF PERSONS WITH DISABILITIES IN FACILITIES.

PRIORITIES TO ADDRESS:

1.1. Investigate facilities serving children with disabilities.

Educate

Know Your Rights (Presentations and Handbook)

- No presentations were completed during Q2.
- The Know Your Rights Handbook is currently being shared with youth for feedback prior to going to print. The feedback has been very positive.

Monitor and Investigate

Monitoring Project – PRTFs and PSFs

	Q1	Q2	Q3	Q4	Total
Facilities visited	5	3			8
Reports filed with overseeing entities	1	0			1
Discharges assisted	1	0			1

Outcomes:

- Complaints related to the care and treatment of youth in residential facilities were reported to DCS including staff abuse, inappropriate restraints, group punishment, and lack of adequate staff.
- A facility changed ownership and licensure. All but 3 youth were discharged to family, foster care, or other facilities. The facility has since remained in ratio and terminated staff who are not compliant with policies. The new administration has been cooperative and communicative with IDR.

Advocate

No current advocacy initiatives tied to this project.

1.2. Investigate or monitor for suspected abuse, neglect, exploitation, and rights violations in facilities or by a service provider.

Educate

Presentations

Natasha Henry gave an overview of IDR's services to a total of 11 new staff members at the monthly ESH/EPCC New Staff Orientations.



Monitor and Investigate

Rep Payee – IDR presented 35 Rep Payee reviews to SSA which are now in end stages of review.

Investigations

- 15 investigations were opened or still open
- 4 investigations conducted; 1 referral for additional action

Investigations in FY2023	Q1 Opened	Q1 Closed	Q2 Opened	Q2 Closed	Q3 Opened	Q3 Closed	Q4 Opened	Q4 Closed	YTD Open	YTD Closed
Client-to-Client Abuse	0	0	0	0					0	0
Death of Patient	0	0	0	2					0	2
Environmental & Facility Safety	0	1	1	0					1	1
Medication Errors	0	0	1	1					1	1
Neglect	2	0	2	2					4	2
Physical Abuse	1	1	0	1					1	2
Sexual Abuse	0	0	0	0					0	0
Unnecessary Restraint	0	0	0	0					0	0
Other Abuse	0	0	0	0					0	0
TOTAL	3	2	4	6					7	8

Monitoring – IDR conducted 28 monitoring visits at 8 facilities.

- **Outcome:** IDR learned of a student in a children's rehabilitation facility who was not permitted to attend school in a general education setting due to removing her tracheotomy. IDR successfully advocated for the school to receive tracheotomy training and the child returned to general education.
- **Outcome:** IDR successfully advocated for a child to transition from using a ventilator full-time to using one only at night. IDR also successfully advocated for this child to return to a general education setting.



- **Outcome:** During a monitoring visit at a state psychiatric facility, an IDR advocate worked with a resident and the facility to resolve a miscommunication. The resident had been in pain due to what she understood to be a boil; she actually had an ovarian cyst. Because the advocate dedicated 1:1 time to the individual, the resident was able to understand the situation and make an informed decision to be treated for the cyst.

Monitoring Project – CRMNF Marion

- Environmental concerns, especially access to personal belongings, continues to be a concern.
- Staffing shortages continue to be at a critically low level, including inadequate staffing to cover the 1:1 level of supervision and general supervision of the units. A complaint was filed by IDR with the facility administrators, ResCare corporate staff, IDOH, CMS, BDDS, and the DD Ombudsman.
 - **Outcome:** IDR's complaint resulted in increased scrutiny from overseeing agencies including IDOH, and DDRS. The DD Ombudsman made an unannounced visit to the facility with Adult Protective Services. ResCare provided a written response to the complaint.

Monitoring Project – Corrections Monitoring

- IDR concluded their contact to administrators and people currently incarcerated in each adult and juvenile correctional facility in Indiana.
- Feedback on next steps was gathered from IDR Staff, the IPAS Commission, and the MAHC.
- The Project Team presented recommendations to agency leadership on future work in this area.

Advocate

Individual Representation

Referenced in 2.1

Individual Representation Outcome

An individual in a long-term care facility experienced frequent falls, including 7 falls in 2 months. IDR met with the client and facility several times and advocated for fall interventions to be implemented. Client's occurrence of falls has substantially decreased.

Systemic Outcome

IDR was contacted by a former staff member of a waiver service provider. Upon investigation, IDR noted several systemic issues present, including unlocked medicine cabinets, cleanliness concerns, and an expired fire extinguisher. Because of IDR's advocacy, fire safety, home cleanliness, safety, and medication storage compliance improved.



Systemic Litigation

Indiana Protection and Advocacy Services Commission et al v. Commissioner, Indiana Department of Correction (1:08-cv-01317-TWP-MJD; Southern District of Indiana)

IDR continues to monitor the settlement agreement. As part of that ongoing monitoring, this quarter, IDR toured the mental health units at New Castle Correctional Facility and Pendleton Correctional Facility. Based on the results of those tours, the court-ordered monitoring period will end in Q3.

Community Connection

Tina Frayer because attending meeting of the Indiana Council Against Senior Exploitation (IN-CASE). The connection allowed IDR to be featured in an [IN-CASE Facebook](#) post in February.

Success Story – Goal 1:

During a monitoring visit at a state psychiatric facility, IDR discovered that two residents were experiencing delays in receiving their annual commitment hearings. IDR confirmed the facility had filed the hearing request then contacted the court and learned there was a system glitch preventing the judge for both cases from receiving the filing. Moving forward, the facility will file all commitment hearings with that court in paper form to avoid delays.



GOAL 2: BREAKING DOWN BARRIERS TO ENSURE RIGHTS ARE RESPECTED AND SUPPORTS ARE AVAILABLE FOR PERSONS WITH DISABILITIES TO PARTICIPATE IN AN EQUITABLE AND INCLUSIVE SOCIETY.

PRIORITIES TO ADDRESS:

2.1. Advocate on behalf of individuals with disabilities in the areas of abuse and neglect, civil rights, discharge from institutions, education, employment, health care, justice, self-determination, and voting.

Educate

Presentations

- Zaida Maldonado-Prather and Bonnie Bomer presented on “Maintaining Rights and Relationships in the Workplace” to 28 Job Coaches, Job Specialists, and VR counselors at the INAPSE Conference.
- Sam Adams participated in a panel discussion regarding alternatives to arrest and incarceration to 8 law students put on by the Indiana University McKinney School of Law Chapter of the National Lawyers Guild.

Events

Bonnie Bomer assisted with 3 Disability Talent Showcases through Work to Include.

Monitor and Investigate

Monitoring Project – SOF Discharge for ID/DD and SMI

- No discharge activities were conducted during Q2.

Advocate

Individual Advocacy Case Data

Individual Advocacy in FY2023	Q1 Opened	Q1 Closed	Q2 Opened	Q2 Closed	Q3 Opened	Q3 Closed	Q4 Opened	Q4 Closed	YTD Open	YTD Closed
AND Advocacy/Discharge	9	7	7	14					16	21
Civil Rights	14	16	15	19					29	35
Education	16	7	26	20					42	27
Employment	9	11	10	12					19	23
Health Care	7	4	9	8					16	12
Self-Determination	4	4	11	2					15	6
TOTAL	59	49	78	75					137	124



Individual Representation Select Outcomes

Deidra – Civil Rights

After “Deidra’s” emotional support animal allegedly bit a maintenance person while in her apartment, her landlord required her to remove the dog from the property. She contacted IDR who negotiated with the landlord for the dog’s return as long as it was kept in a crate or behind a closed door when personnel were in the apartment. The landlord also agreed to try to give at least two hours’ notice prior to entering her apartment.

Ezra – Civil Rights

When “Ezra” was denied paratransit services and the company refused to allow him to appeal, he contacted IDR. Because of IDR’s advocacy, the company recognized their error and re-evaluated Ezra’s application, granting him conditional paratransit services.

Gloria – Employment

“Gloria” disclosed her disability and accommodation requests during the hiring process and was offered a part-time teaching position with her local school system. After meeting with HR, though, the school rescinded the employment offer. After attempting to resolve the issue with informal advocacy, IDR helped Gloria file a complaint with the EEOC who did not make a determination. IDR then filed a Title I lawsuit under the ADA and the case settled with the client receiving monetary damages.

Grayson – Education

“Grayson,” was disciplined at school for behaviors related to his Tourette’s Syndrome by being placed in restraints in a self-contained classroom. IDR advocated for him to be returned to a less restrictive setting, his IEP to include more academic services, and for Grayson to be able to type long assignments.

Jack – Civil Rights

“Jack” requested an ASL interpreter for parole meetings and classes when he was released from prison. When his request was denied and he was told to pay for his own interpreter, he contacted IDR. Through advocacy, IDOC agreed to provide video remote interpreting (VRI) for Jack during 1:1 parole meetings and excuse him from group activities.

Jason – Education

“Jason,” a 13-year-old wheelchair user found it difficult to make it the distance to his bus stop and the school refused to come farther into his apartment complex. IDR helped Jason’s parent formally request an accommodation and it was successfully granted.



Jayden – Education

Kindergartener “Jayden” was suspended 8 times this school year due to disability-related behaviors. IDR successfully advocated for Jayden to return to full-time school with a behavior plan and more appropriate services.

Samuel – Employment

“Samuel,” an individual with an intellectual disability, had worked as a custodian for a fast food restaurant for several years. When he felt he was not being offered advancement opportunities, he contacted IDR who partnered with Samuel’s Employment Specialist. Together, they worked with Samuel to help him advocate to receive a promotion, including a raise to his hourly salary.

Trina – Health Care

After a phlebotomist asked “Trina” multiple questions about her service dog and suggested she not bring it back to the facility, she contacted IDR. Through fact-finding, it appeared the health care facility’s service animal policy was comprehensive and compliant with applicable laws but the phlebotomist was not following the policy. IDR advocated for the phlebotomist to receive additional training regarding the policy.

Systemic Litigation

Indiana Protection and Advocacy Services Commission v. Indiana Family and Social Services Administration et al (1:22-cv-00906-JRS-TAB; Southern District of Indiana)

Plaintiff appealed the court’s denial of a motion for preliminary injunction. Defendants provided updated data showing significant decrease in wait times for competency restoration services. The parties dismissed the appeal in order to conduct additional discovery on reduced wait times and discuss settlement.

Policy Advocacy

Legislative Advocacy

- On January 25, 2023, IDR submitted written testimony about SB 1, a bill about mental health matters including the Behavioral Health Commission, to members of the Senate Committee on Health and Provider Services.
- On February 7, 2023, IDR submitted written testimony regarding HB 1172, which would have required children to be given counsel in Children in Need of Service legal proceedings. IDR’s testimony was provided to the House Judiciary Committee.
- On March 21, 2023, IDR submitted written testimony and testified regarding HB 1006 involving changes to Indiana’s emergency detention process.



Advocacy Projects

- Diversity in Hiring
 - Data collection for a study examining the impact of ethnicity/national origin and disability on hiring is completed.
 - The data is being analyzed and report/research paper on project has been completed.
- Twice Exceptional Students Project
 - Research was conducted to learn best practices for twice exceptional K-12 students.
 - Information will be used to develop a law review and/or journal article that will discuss how this process could best work in the state of Indiana.

2.2. Advocate for ending sheltered workshops and increasing competitive integrated employment.

Educate

Materials – Competitive Integrated Employment (CIE) Initiative

- Fact sheet translation into American Sign Language (ASL) and Spanish are complete.
- IDR will make these resources publicly available on its website and YouTube channel in Q3.

Monitor and Investigate

Monitor DDRS Employment Systems Transformation Plan

IDR continues to work with the Center for Public Representation and DDRS on monitoring DDRS' implementation of its CIE transition plan.

Advocate

IDR staff met with representatives from the Rehabilitation Services Administration (RSA) as part of its audit of Indiana Vocational Rehabilitation Services.

2.3. Advocate for access to Home and Community-Based Services (HCBS).

Educate

No current education activities tied to this priority.

Monitor and Investigate

Agency Availability Survey

- IDR continues to survey home health agencies serving Marion County residents participating in the Aged & Disabled Waiver.
- Survey data will be evaluated to obtain quantitative information supporting client anecdotes about difficulty finding home health care.



Advocate

Policy Advocacy

Systems Outreach

- IDR submitted 3 letters to FSSA about the heightened scrutiny review of three assisted living facilities that are presumed institutional in nature pursuant to the federal HCBS Settings Rule.
- IDR's ED continued connecting with FSSA staff and contractors to better understand the processes for ensuring compliance with federal HCBS Settings Rule.
- IDR contacted representatives from federal agencies and national advocacy organizations regarding HCBS compliance monitoring initiatives.

Public Comment

- IDR submitted public comments regarding the heightened scrutiny review of the following settings monitored by the Division of Aging. The review process is mandated by the federal HCBS Settings Rule that went into effect on March 17, 2023.
 - Valparaiso Senior Village on January 18, 2023
 - Waters of Rushville on January 25, 2023
 - River Terrace on February 10, 2023
- IDR submitted public comments to CMS regarding Medicare's proposal to expand coverage for wheelchair seat elevators on March 10, 2023.

Legislative Advocacy

- On January 26, 2023, Emily Munson and IPAS Commission Chair Amber O'Haver met with Senator Rogers to discuss SB 310, a bill that would remove income and resource limits for the M.E.D. Works program. They also discussed the bill with Senator Crane on February 13, 2023.
- On January 31, 2023, IDR submitted written testimony to the Senate Committee on Health and Provider Services regarding SB 474. That bill would eliminate the requirement that home health agencies drug test certain employees.
- On February 14, 2023, IDR submitted written testimony to the Senate Committee on Health and Provider Services regarding SB 438, a bill that would set minimum reimbursement rates for home health services and require caregiver training.

Press

Emily Munson was [interviewed by WFYI](#) about [HB1342](#).

2.4. Advocate for the expansion of knowledge and use of supported decision-making/less restrictive alternatives to guardianship.

Educate

Presentation

- Tash Crespo presented on "Options for Supporting Self-Determination and Decision-Making in Adulthood" to 5 parents of the Crown Point School System.



Technical Assistance

- IDR provided consultation or technical assistance to over 28 organizations or entities regarding guardianship and self-determination.
- IDR provided technical assistance and resources to the Office of Senator Mike Braun and Senator Bob Casey for their work on the Senate Committee on Aging in advance of a hearing about guardianship reform efforts.

Monitor and Investigate

Monitoring Project – Court Filings

IDR continues to review court cases of guardianships filed since the implementation of Indiana's SDM bill. Initial data were analyzed.

Advocate

Individual Representation Select Outcome

Hadley – Self-Determination

After “Hadley,” an adult with disabilities, moved out of her father’s house, he filed for guardianship in an attempt to make her return to his home. IDR swiftly acted to provide successful representation to Hadley in defending against the unnecessary guardianship. IDR also helped Hadley connect with BDSS to apply for permanent housing and disability-related supports. IDR also assisted Hadley in understanding her options for supporting her decision-making, including helping her identify someone she wished to appoint as her Health Care Representative.

Mark – Self Determination

In 2017, “Mark” was financially exploited and had his identity stolen by individuals he believed to be his friends. He was then placed under a plenary guardianship after he and his parents visited a local attorney for advice on how to address the situation and were told it was their only option. Over time, Mark and his parents recognized that what he needed was guidance and support with decision-making rather than someone to manage his affairs on his behalf. Ultimately, IDR represented Mark in the agreed termination of his guardianship, and helped Mark establish agency agreements that permit him to continue to receiving assistance from his parents in managing his healthcare and finances to the degree he desires.

Rory – Self-Determination

“Rory” contacted IDR seeking to terminate her guardianship in favor of less restrictive alternatives. IDR represented Rory in a successful termination and assisted her in becoming the first person her county Trustee’s office will serve as Rep Payee for. Following termination, Rory set up a Health Care Representative and moved to independent housing.



Advocacy Projects

- CYVYC Transition-Aged Youth – IDR continued to work with youth ambassadors on their individual projects as well as projects to benefit the state plan. IDR met with representatives from Quillo to learn more about the platform as a way to disseminate information to parents and families. IDR was also asked to present with CYVYC leadership at a conference on HCBS. IDR is supporting one of our youth ambassadors to participate.
- Advanced Directives for People with ID/DD – IDR conducted both an in-person and virtual advanced directive clinic. In Q2, IDR partnered with 4 external pro bono attorneys and the Muscular Dystrophy Family Foundation to provide advanced directive services to 10 families.

Policy Advocacy

Legislative Advocacy

- On February 7, 2023, IDR submitted written testimony about HB 1591, a bill that would require discussion of supported decision-making at case conference committee meetings, to the House Education Committee. IDR submitted additional written testimony about the bill on March 7, 2023, to members of the Senate Education and Career Development Committee. The bill passed and was signed into law.
- On March 23, 2023, IDR submitted written testimony regarding the need for guardianship reform to the U.S. Senate Special Committee on Aging.
- IDR provided comments on SB 287. Because of IDR's advocacy, language was included to expressly allow people under guardianship to seek access to their records if they are being denied.
- IDR provided comments and outreach to stakeholders regarding the Guardianship Bill of Rights proposed by Senator Bob Casey.

Press

Justin Schrock and two IDR clients, Nick Clouse and Sara Abbott, were featured in Bloomberg Law's [five-part series](#), "In the Name of Protection."

- [In the Name of Protection: Part 1: The Profiteers](#) (featuring IDR Staff Attorney Justin Schrock & client Nick Clouse)
- [In the Name of Protection: Part 2: The Judges](#)
- [In the Name of Protection: Part 3: The Guardians](#)
- [In the Name of Protection: Part 4: The Lawyers](#) (featuring IDR client Sara Abbott)
- [In the Name of Protection: Part 5: A Solution](#) (featuring IDR Staff Attorney Justin Schrock & clients Nick Clouse and Sara Abbott)

2.5. Advocate to ensure elections are accessible to voters with disabilities.

Educate

Presentation

Kristin Dulaney presented on "Election Accessibility" to 65 County Clerks and their staff at the Northern District Clerk's Association Spring Conference.



Digital Media – Hoosiers Vote

	Q1	Q2	Q3	Q4
Percent of website visits to a voting-related webpage	90%	25%		
Percent of website visits to single most frequented voting-related webpage	75%	16%		
Single most frequented voting-related webpage	Vote Early	Voter Registration		

Monitor and Investigate

Monitoring – Polling Place Accessibility Surveys

13 community partners were trained to survey early voting sites.

Advocate

Systemic Litigation

American Council of the Blind of Indiana et al. v. Indiana Election Commission et al. (1:20-cv-03118-JMS-MJD; U.S. District Court, Southern District of Indiana)

The parties reached a settlement in which the Defendants agreed to provide voters with print disabilities a remote accessible vote by mail tool with email return beginning with the May 2023 primary election. By agreement, the district court also extended the preliminary injunction making use of the traveling board permissive rather than mandatory for the November 2023 primary election. The settlement also requires Defendants to provide data about the use of the RAVBM tool following subsequent elections. Defendants agreed to pay attorneys' fees to Plaintiffs' attorneys with IDR and Disability Rights Advocates.

Press

ACBI – The above settlement featured in several publications, including:

- [Settlement will allow for independent absentee voting options for Hoosiers with print disabilities](#); The Indiana Lawyer
- [Settlement expands voting access to Hoosiers with print disabilities](#); Indiana Public Media
- [Indiana agrees to lift barriers for blind voters after 'historic' lawsuit](#); Indy Star

Success Story – Goal 2:

The Bloomberg Law series, detailed on page 19, resulted in a [follow-up article about client Sara Abbott](#) and a Bloomberg's [“The Big Take”](#) podcast interview with Justin Schrock.



GOAL 3: SERVING AS A PARTNER IN RIGHTS ISSUES BY SUPPORTING INDIVIDUALS AND ORGANIZATIONS LED BY PEOPLE WITH DISABILITIES, THOSE FROM MARGINALIZED COMMUNITIES, AND PEOPLE WITH LIVED EXPERIENCES.

PRIORITIES TO ADDRESS:

3.1. Provide easily accessible and equitable paths for the public to contact IDR for advocacy needs and to find information, referrals, and resources.

Educate

I/R and Website

	Q1	Q2	Q3	Q4	Total
Intake Requests	643	852			1,495
Information & Referrals	17	13			30
Website Sessions	186,566	8,456			195,022

Presentations

Presentation topics are noted throughout this report.

	Q1	Q2	Q2	Q4	Total
Presentations	14	6			18
Attendees	722	157			831

Communication Plan

- IDR relaunched its newsletter. [Subscribe](#) to receive occasional news about press, fact sheets, and ways to engage with IDR's work.

Website Redesign

- See "Success Story – Goal 3" on page 22.

Monitor and Investigate

No monitoring/investigating activities tied to this priority.

Advocate

No current advocacy initiatives tied to this project.

Community Connection

- Tash Crespo hosted a table at the Midwest Public Interest Law Career Conference.
- Melissa Keyes connected with the Hawthorne Community Center. IDR connected the organization to information about disability resources.



3.2. Support the legislative and policy work and meaningful inclusion of people with disabilities, those from marginalized communities, and people with lived experiences on issues that align with IDR's mission, vision, and values.

Educate

Presentation

Emily Munson and Natalie Miller of the Marion County Prosecutor's Office co-presented on disability cultural competency to 40 legal staff of the Prosecutor's Office.

Monitor and Investigate

No monitoring/investigating activities tied to this priority.

Advocate

Policy Advocacy

As noted under Goal 2.3, Emily Munson and Tash Crespo, as well as Amber O'Haver, participated in several workgroups regarding Indiana's efforts to expand self-directed services to more Medicaid waiver participants. Emily and Amber are the only participants who currently use self-directed personal care.

Also noted under Goal 2.3, Amber O'Haver and Emily Munson spoke with Senators Rogers and Crane to discuss potential reform of the M.E.D. Works program at the beginning of the quarter. The explained how the program's outdated income and resource limits maintain barriers to employment for people with disabilities.

Legislative Advocacy

- On January 12, 2023, IDR submitted written testimony regarding HB 1198, a bill that would decriminalize HIV, to members of the House Committee on Courts and the Criminal Code.
- On January 31, 2023, IDR submitted written testimony about SB 4, a bill about public health, noting that the absence of people with disabilities on pandemic advisory groups led to chaos and unmet needs. This testimony was provided to the Senate Committee on Health and Provider Services.
- IDR ED connected with several federal and state legislators about IDR generally.

Success Story – Goal 3:

After working with IOT, IDR debuted a redesigned website navigation layout. Each Team has a webpage with commonly asked questions, hopefully making it easier for clients to find the information they seek. New webpages were also created for the [MHAC](#) and [IPAS Commission](#).



Active Workgroups

Workgroup	Goal
Diversity Roundtable of Indianapolis	DEI Goal 3
Indiana State Bar Association Diversity Committee	DEI Goal 3
ISBA Diversity CLE Committee	DEI Goal 3
Ivy Tech Diversity Workgroup	DEI Goal 3
BQIS Incident Reporting Process Workgroup Collaborative Workgroup	P&O 1.2
Facility-Based Human Rights Committees	P&O 1.2
Mortality Review Committee (MRC)	P&O 1.2
NDRN Residential Facilities Community of Practice	P&O 1.2
ResCare Marion Bureau of Developmental Disabilities Services (BDDS) Transition Meeting	P&O 1.2
ADA-Indiana Steering Committee	P&O 2.1
Back Home in Indiana Alliance Steering Committee	P&O 2.1
Carmel Advisory Committee on Disability	P&O 2.1
Department of Justice Civil Rights Roundtable	P&O 2.1
Disability Employment Technical Assistance Center (DETAC) Grantee Advisory Workgroup	P&O 2.1
Division of Disability and Rehabilitative Services (DDRS) Advisory Council	P&O 2.1
Fair Housing Center of Central Indiana Board of Directors	P&O 2.1
Fishers Advisory Committee on Disability	P&O 2.1
Indiana Association of People Supporting Employment First (INAPSE) Public Policy Committee	P&O 2.1
Indiana Council Against Senior Exploitation (IN-CASE)	P&O 2.1
Indiana Counsel for Kids Coalition	P&O 2.1
Indiana Department of Transportation (INDOT) Americans with Disabilities Act (ADA) Community Advisory Working Group	P&O 2.1
Indiana Educational Equity Coalition	P&O 2.1
Indianapolis Mayor's Advisory Council on Disability (MAC-D)	P&O 2.1
Institutional Modernization Workgroup	P&O 2.1
Medicaid All Hands	P&O 2.1
National Board of Directors for Association of People Supporting Employment First (APSE)	P&O 2.1
Paratransit Next Steps Taskforce	P&O 2.1
REV UP Advisory Committee	P&O 2.5
RISE Peer Mentor	P&O 2.1



Waiver re-design workgroups	P&O 2.1
DDRS Advisory Council CIE Workgroups	P&O 2.2
Vocational Rehabilitation (VR) Commission	P&O 2.2
Work to INclude Advisory Committee	P&O 2.2
Work to INclude Coalition	P&O 2.2
Center for Youth and Adults with Conditions of Childhood (CYACC) Advisory Board	P&O 2.3
CMS Stakeholders	P&O 2.3
Health Care Justice Coalition	P&O 2.3
LifeCourse Ambassador Group	P&O 2.3
LifeCourse Partners in Transformation Chapter Group	P&O 2.3
Long-Term Care Coalition	P&O 2.3
National Center on Advancing Person-Centered Practices and Systems' Self-Directed Learning Collaborative	P&O 2.3
Indiana Adult Guardianship State Taskforce (WINGS)	P&O 2.4
Indiana Supported Decision-Making Coalition	P&O 2.4
Indiana Traumatic Brain Injury Advisory Board	P&O 2.4
National Coalition for a Civil Right to Counsel	P&O 2.4
Uniform Guardianship Act Subcommittee for Probate Review Committee	P&O 2.4
Indiana Voting Coalition	P&O 2.5
PANDA Improvement Workgroup	P&O 3.1
TASC Advisory Group (TAG) Advocacy Working Group	P&O 3.1
Governor's Council for People with Disabilities	P&O 3.2
HIVMM Coalition	P&O 3.2
Indiana Advisory Committee to the US Commission on Civil Rights	P&O 3.2
Indiana Disability Advisory Group- State of Indiana Office Chief Equity, Inclusion and Opportunity	P&O 3.2
International Initiative for Disability Leadership	P&O 3.2
National Alliance on Mental Illness (NAMI)-Indiana Public Policy Committee	P&O 3.2
National Disability Rights Network (NDRN) – CEO Meetings, Legal Director Meetings	P&O 3.2
National Disability Rights Network (NDRN) Technical Assistance Advisory Committee	P&O 3.2
Self-Advocate Innovation Collaborative	P&O 3.2
Transition Partners of Northeast Indiana	P&O 3.2
United States Attorney's Office (USAO) Disability Rights Roundtable	P&O 3.2



Acronyms

List of Common Acronyms

504 -	Section 504 of the Rehabilitation Act of 1973-504
ACF -	Administration for Children and Families
ACLU -	American Civil Liberties Union
ADA -	Americans with Disabilities Act
AIDD -	Administration on Intellectual and Developmental Disabilities
APS -	Adult Protective Services
ARC -	State and local organizations for developmental disability advocacy
ARTICLE 7 -	Special Education Regulations (Indiana)
BDDS -	Bureau of Developmental Disabilities Services
BQIS -	Bureau of Quality Improvement Services
CEO -	Chief Executive Officer
CIH Waiver -	Community Integration and Habilitation Waiver
CMS -	Center for Medicare and Medicaid Services
CPR -	Center for Public Representation
CRMNF -	Comprehensive Rehabilitative Management Needs Facility
CYVYC	Center on Youth Voice/Youth Choice
DCC -	IDR Diversity and Cultural Competency Workgroup
DCS -	Department of Child Services
DD -	Developmental Disabilities
DD Act -	Developmental Disabilities Assistance and Bill of Rights Act
DD Council -	Developmental Disabilities Council
DDRS -	Division of Disability and Rehabilitative Services
DMHA -	Division of Mental Health and Addictions
DOC -	Indiana Department of Correction
DOE -	Indiana Department of Education
EEOC -	Equal Employment Opportunity Commission
FBA -	Functional Behavioral Assessment
GCPD -	Governor's Council for People with Disabilities
HAVA -	Help America Vote Act
HMM -	HIV Modernization Movement
HRSA -	Health Resources and Services Administration
I&R -	Information and Referral
ICF -	Intermediate Care Facility
ICRC -	Indiana Civil Rights Commission



ICLU -	Indiana Civil Liberties Union
ID -	Intellectual Disability
IDD -	Intellectual or Developmental Disabilities
IDR -	Indiana Disability Rights
IDEA -	Individuals with Disabilities Education Act (Federal)
IDOH -	Indiana Department of Health
IIDC/Institute -	The Indiana Institute on Disability and Community
IN*SOURCE -	Indiana's Parent Training Information Project
IPE -	Individual Plan for Employment
LD -	Learning Disability
MI -	Mental Illness
NDRN -	National Disability Rights Network
OCR -	Office of Civil Rights
OMB -	Office of Management and Budget
OMPP -	Office of Medicaid Policy and Planning
P&A -	Protection & Advocacy System
PPR -	Program Performance Report
PRTF -	Psychiatric Residential Treatment Facility
PSF -	Private Secure Facility
PTSD -	Post-Traumatic Stress Disorder
RSA -	Rehabilitation Services Administration
RULE7 -	Part of Nursing Home Regulations (Indiana) concerning the facility's requirements for programming for MR residents used in QMRP-D Training
SAI -	Self-Advocates of Indiana
SAMHSA -	Substance Abuse and Mental Health Services Administration
SDM -	Supported Decision-Making
SGL -	Supervised Group Living
SSA -	Social Security Administration
TA -	Technical Assistance
TASC -	Training and Advocacy Support Center
TBI -	Traumatic Brain Injury
UCEDD -	University Centers for Excellence in Developmental Disabilities
USDOE -	United States Department of Education
VA -	Veterans Affairs
VR/Voc Rehab -	Vocational Rehabilitation Services



IDR Teams

- Abuse, Neglect, and Discharge (AND)
- Civil Rights
- Education
- Employment
- Health Care
- Policy and Special Projects (PSP)
- Self-Determination
- Representative Payee

IDR Staff

Please visit <https://www.in.gov/idr/staff/our-staff/> to view a current staff list.

Grant Programs

CAP -	Client Assistance Program
PAAT -	Protection & Advocacy for Obtaining Assistive Technology
PABSS -	Protection & Advocacy for Beneficiaries of Social Security
PADD -	Protection & Advocacy for Persons with Developmental Disabilities
PAIMI -	Protection & Advocacy for Individuals with Mental Illness
PAIR -	Protection & Advocacy for Individual Rights
PATBI -	Protection & Advocacy for Persons with Traumatic Brain Injury
PAVA -	Protection & Advocacy for Voting Access

State Hospitals

LCH -	Larue Carter Hospital
LSH -	Logansport State Hospital
EPCC -	Evansville Psychiatric Children's Center
ESH -	Evansville State Hospital
MSH -	Madison State Hospital
RSH -	Richmond State Hospital

FY2023 BUDGET	Q2 - Totals	CAP	PADD	PAIR	PAVA	PABSS	PAIMI	PATBI	REP PAY	PAAT	PHWF
EXPENSES	1/1/23-3/31/23										
Personnel Costs	968,024.29	58,561.56	162,568.10	124,355.24	14,610.79	48,770.63	218,392.03	11,582.58	248,852.79	36,210.25	35,348.78
SALARY (+SS)*		42,584.09	116,847.02	92,390.69	10,375.23	35,672.39	157,391.76	8,438.64	182,259.00	26,570.64	24,494.03
BENEFITS*		10,064.44	29,495.62	19,147.62	2,786.29	8,149.98	39,172.92	1,973.29	41,296.64	5,954.95	7,459.15
PERF		5,707.95	15,668.41	12,376.83	1,391.52	4,780.70	21,099.00	1,130.71	24,424.62	3,559.70	3,280.00
501 Retiree Medical Expenses		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Contracted Workers*		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Deferred Compensation (Hoosier START) State Match		205.08	557.05	440.10	57.75	167.56	728.35	39.94	872.53	124.96	115.59
Misc. (e.g., background checks, workers comp)		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Travel	10,458.54	94.87	1,143.01	1,089.52	40.32	165.74	1,525.58	157.67	5,468.29	566.20	199.50
In-State (Mileage, Car Rentals, Per Diem, Hotels, etc)		94.87	1,143.01	58.85	40.32	165.74	1,525.58	157.67	3,466.79	566.20	199.50
Out-of-State (Travel, Hotel, Per Diem, etc)*		0.00	0.00	1,030.67	0.00	0.00	0.00	0.00	2,001.50	0.00	0.00
Commission and MHAC		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Operations	83,176.44	4,213.11	11,989.24	11,027.82	991.68	3,955.52	19,547.95	1,826.54	23,739.92	4,139.44	1,745.22
Rent (\$9891.81/mo; \$9,641/mo)		2,147.23	6,916.08	6,463.88	338.43	2,346.81	11,721.55	431.00	14,279.50	2,511.68	1,052.88
IOT (hardware, software, IOT services, website hosting)		469.56	1,533.25	1,410.76	79.93	526.39	2,683.40	99.55	3,181.86	599.72	201.43
HUMAN RESOURCES/SPD*		125.25	398.88	378.00	18.39	133.83	656.14	23.92	819.79	135.14	68.20
Centralized Accounting & PeopleSoft Financial Software*		195.08	631.73	587.00	31.66	215.26	1,083.70	39.98	1,306.82	236.20	91.25
Phone (ATT, Landline/1-800)		63.15	206.09	189.68	10.73	70.74	360.43	13.37	427.63	80.50	27.18
On-site storage (new office space)		50.11	161.39	150.85	7.90	54.77	273.54	10.07	333.21	58.58	24.58
Verizon Cell Phones		105.23	343.56	316.18	17.88	117.93	600.98	22.29	712.95	134.23	45.24
Hinkley- water (\$96.92/month)		9.68	21.93	15.04	3.86	6.32	34.40	1.86	36.76	4.04	6.97
Office Equipment Rentals (copier, postal system)		49.05	155.35	148.11	6.99	51.89	252.29	9.16	318.71	50.95	27.81
Post Master (Courier Service, Postage, Mailing Services)		42.50	143.64	104.94	83.19	41.57	129.29	9.17	246.96	45.26	20.18
Employee Reimbursement for Postage		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
NDRN (Dues, meetings)		360.77	1,095.50	742.34	134.98	281.21	1,251.55	1,151.70	1,419.58	194.44	97.29
Koorsen Security (security system)		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Office Supplies		48.67	149.96	146.55	6.33	53.00	265.58	0.48	316.57	54.07	28.00
Computer/Printer Supplies		1.74	6.11	5.16	242.50	2.23	12.45	0.48	13.01	3.26	0.14
Interpreter/CART Services/Translator		522.14	132.34	292.02	5.01	27.79	112.19	7.69	168.16	14.62	30.29
Subscription Services (prof. orgs., software, news)		22.95	93.43	77.31	3.90	25.78	110.46	5.82	158.41	16.75	23.78

FY2023 BUDGET	Q2 - Totals	CAP	PADD	PAIR	PAVA	PABSS	PAIMI	PATBI	REP PAY	PAAT	PHWF
Legal/Program	5,454.29	587.00	1,052.03	569.22	36.00	217.79	1,309.39	45.19	1,303.73	249.93	84.01
Litigation Expenses & Records Requests (Filing fees, experts, docs, etc.)		424.34	509.95	82.79	5.06	28.05	113.25	7.76	169.75	14.76	30.58
AUTOMON LLC (Case Management)		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Westlaw (legal research; \$554.01/month)		162.66	542.08	486.43	30.94	189.74	996.14	37.43	1,133.98	235.17	53.43
Registration Fees (Staff Training)*		0.00	0.00	0.00	0.00	0.00	200.00	0.00	0.00	0.00	0.00
Communication/Outreach	1,850.00	0.00	0.00	1,850.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Self-Advocate Stakeholder Reimbursement		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IDR Website Redesign		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Conference Exhibits/Tables		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Printing		0.00	0.00	1,850.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Misc.	672.50	22.23	111.13	65.81	5.34	28.43	158.73	6.11	165.90	107.01	1.81
Misc.		22.23	111.13	65.81	5.34	28.43	158.73	6.11	165.90	107.01	1.81
TOTAL EXPENSES	1,069,636.06	63,478.77	176,863.51	138,957.61	15,684.13	53,138.11	240,933.68	13,618.09	279,530.63	41,272.83	37,379.32

Grant	Date to Spend	Authorized Amt.	Amt. Received	Total Disbursed	Federal (02/24/23)	State (04/11/23)	NOTES
IBF 2022 CEG	6/12/2023	\$35,000.00	\$35,000.00	\$20,502.89		\$14,497.11	
Rep Payee 2021	7/31/2023	\$566,090.33	\$566,090.33	\$566,090.33	\$0.00	\$0.00	SPENT DOWN
CAP 2022*	9/30/2023	\$223,477.00	\$223,477.00	\$145,818.60	\$77,658.40	\$81,232.26	
PAAT 2022	9/30/2023	\$84,949.00	\$84,949.00	\$84,949.00	\$0.00	\$0.00	SPENT DOWN
PABSS 2022	9/30/2023	\$144,776.00	\$144,776.00	\$121,812.53	\$22,963.47	\$15,727.96	
PADD 2022	9/30/2023	\$676,954.00	\$676,954.00	\$532,619.97	\$144,334.03	\$153,653.80	
PAIMI 2022	9/30/2023	\$625,258.00	\$625,258.00	\$625,258.00	\$0.00	\$0.00	SPENT DOWN
PAIR 2022*	9/30/2023	\$325,379.00	\$325,379.00	\$325,379.00	\$0.00	\$0.00	SPENT DOWN
PATBI 2022	9/30/2023	\$73,191.00	\$73,191.00	\$59,163.34	\$14,027.66	\$15,510.82	
Rep Payee 2022 (Y5)	7/31/2024	\$597,962.46	\$597,962.46	\$401,142.25	\$196,820.21	\$208,459.22	
CAP 2023*	9/30/2024	\$223,610.00	\$223,610.00	\$0.00	\$223,610.00	\$223,610.00	
PAAT 2023	9/30/2024	\$91,858.00	\$91,858.00	\$50,049.50	\$41,808.50	\$42,621.56	
PABSS 2023	9/30/2024	\$135,540.00	\$135,540.00	\$0.00	\$135,540.00	\$135,540.00	6.34% - from final FFY22 allocation.
PADD 2023	9/30/2024	\$702,261.00	\$702,261.00	\$0.00	\$702,261.00	\$702,261.00	
PAIMI 2023	9/30/2024	\$647,370.00	\$647,370.00	\$173,601.97	\$473,768.03	\$480,025.66	3.54% +
PAIR 2023*	9/30/2024	\$342,603.00	\$342,603.00	\$49,590.16	\$293,012.84	\$298,556.75	
PATBI 2023	9/30/2024	\$89,516.00	\$89,516.00	\$0.00	\$89,516.00	\$89,489.09	
PAIMI 2023 PI Restricted	9/30/2024		\$4,250.00			\$4,250.00	
PADD 2023 PI Restricted	9/30/2024		\$200.00			\$200.00	
ACL PHWF 2022	9/30/2024	\$114,000.00	\$114,000.00	\$57,558.76	\$56,441.24	\$56,833.43	
State Agency Cont. Fund	6/30/2025	[\$1,000,000]					Waiting on SBA
Rep Payee 2023 (Y1)	7/31/2025	\$650,104.23					Currently in application process
PAVA 2021	9/30/2025	\$112,313.00	\$112,313.00	\$84,323.72	\$27,989.28	\$29,159.75	
PAVA 2022	9/30/2026	\$119,365.00	\$119,365.00	\$0.00	\$119,365.00	\$119,365.00	
PAVA 2023	9/30/2027	\$141,043.00	\$141,043.00	\$0.00	\$141,043.00	\$141,043.00	
CAP 2019 PI UR	Unrestricted	\$112,637.50					Waiting on GCPD PO (Disability Law Fellow)
Non-Federal	Unrestricted					\$194,745.85	
PADD 2020 PI UR	Unrestricted		\$6,000.00			\$6,000.00	
PADD22 PI UR	Unrestricted		\$15,000.00			\$15,002.05	
PAIMI 2021 PI UR	Unrestricted		\$2,500.00			\$2,500.00	
PAIMI 2022 PI UR	Unrestricted		\$32,175.00			\$32,175.00	
PAIR 2017 PI UR	Unrestricted		\$22,419.92			\$22,419.92	
PAIR 2021 PI UR	Unrestricted		\$56,148.85			\$56,148.85	
PAIR 2023 PI UR	Unrestricted		\$100,000.00			\$100,000.00	
PABSS 2023 PI UR	Unrestricted		\$4,000.00			\$4,000.00	

FFY 2023 BUDGET - AMENDED	FY 2023	Q1	Q2	Q3	Q4	Difference
	10/01/22-09/30/23	10/01/22-12/31/22	1/1/23-3/31/23	4/1/23-6/30/23	7/1/23-9/30/23	
INCOME/AVAILABLE FUNDS	5,013,082.53	4,290,735.62	2,959,910.33	0.00	0.00	
<i>Federal Grants</i>	<i>4,601,484.25</i>	<i>3,962,567.07</i>	<i>2,507,971.55</i>	<i>0.00</i>	<i>0.00</i>	
FFY 2022 (spend/obligate by 9/30/2023)	1,776,154.79	887,966.03	266,124.84			
FFY 2023 Received (spend by 9/30/2024+)	1,178,179.46	1,371,549.04	2,241,846.71			
FFY 2023 Estimated Additional (spend by 9/30/2024+)	1,647,150.00	1,703,052.00	0.00			
<i>Non-Federal Grants</i>	<i>411,598.28</i>	<i>328,168.55</i>	<i>451,938.78</i>	<i>0.00</i>	<i>0.00</i>	
Program Income/Atty Fees (Restricted)	10,000.00	300.00	4,450.00			
Program Income/Atty Fees (Unrestricted)	60,000.00	105,068.77	238,245.82			
Non-Federal Income/Unrestricted Balance	194,745.85	194,745.85	194,745.85			
GCPD Disability Law Fellow - Direct bill	112,637.50	0.00	0.00			
2022 IBF Community Empowerment Grant	34,214.93	28,053.93	14,497.11			
EXPENSES						
Personnel Costs	3,219,971.85	563,112.63	968,024.29	0.00	0.00	1,688,834.93
SALARY (+SS)*	2,184,058.73	410,748.84	703,298.88			1,070,011.01
BENEFITS*	695,368.44	91,029.54	167,121.84			437,217.06
PERF	239,686.68	55,108.13	94,261.93			90,316.62
501 Retiree Medical Expenses	33,858.00	0.00	0.00			33,858.00
Contracted Workers*	50,000.00	4,106.96	0.00			45,893.04
Deferred Compensation (Hoosier START) State Match	12,000.00	2,115.81	3,341.64			6,542.55
Misc. (e.g., background checks, workers comp, unemployment)	5,000.00	3.35	0.00			4,996.65
<i>Travel</i>	<i>37,500.00</i>	<i>17,516.60</i>	<i>10,458.54</i>	<i>0.00</i>	<i>0.00</i>	<i>9,524.86</i>
In-State (Mileage, Car Rentals, Per Diem, Hotels, etc)	25,000.00	12,289.98	7,426.37			5,283.65
Out-of-State (Travel, Hotel, Per Diem, etc)*	10,000.00	5,226.62	3,032.17			1,741.21
Commission and MHAC	2,500.00	0.00	0.00			2,500.00
Operations	332,747.84	99,477.25	83,176.44	0.00	0.00	150,094.15
Rent (\$9,641/mo)	115,701.75	28,925.43	48,209.04			38,567.28
IOT (hardware, software, IOT services, website hosting)	70,783.05	35,821.96	10,785.85			24,175.24
HUMAN RESOURCES/SPD*	20,000.00	3,604.72	2,757.54			13,637.74
Centralized Accounting & PeopleSoft Financial Software*	20,000.00	5,809.56	4,418.68			9,771.76
Phone (ATT, Landline/1-800)	20,000.00	4,316.13	1,449.50			14,234.37
On-site storage (new office space)	2,700.00	675.00	1,125.00			900.00
Verizon Cell Phones	16,000.00	3,498.82	2,416.47			10,084.71
Hinkley- water (\$96.92/month)	1,163.04	128.67	140.86			893.51
Office Equipment Rentals (copier, postal system)	3,500.00	623.93	1,070.31			1,805.76
Post Master (Courier Service, Postage, Mailing Services)	5,000.00	899.17	866.70			3,234.13
Employee Reimbursement for Postage	100.00	0.00	0.00			100.00
NDRN (Dues, meetings, LRP)	30,000.00	6,488.17	6,729.36			16,782.47
Koorsen Security (security system)	1,800.00	7,547.15	0.00			-5,747.15
Office Supplies	4,000.00	158.78	1,069.21			2,772.01
Computer/Printer Supplies	2,000.00	0.00	287.08			1,712.92
Interpreter/CART Services/Translator	15,000.00	830.76	1,312.25			12,856.99
Subscription Services (prof. orgs., software, news)	5,000.00	149.00	538.59			4,312.41
Legal/Program	62,832.00	21,844.46	5,454.29	0.00	0.00	35,533.25
Litigation Expenses & Records Requests (Filing fees, experts, docs, etc.)	30,000.00	17,304.26	1,386.29			11,309.45
AUTOMON LLC (Case Management)	13,000.00	0.00	0.00			13,000.00
Westlaw (legal research)	14,832.00	2,472.00	3,868.00			8,492.00
Registration Fees (Staff Training)*	5,000.00	2,068.20	200.00			2,731.80
		0.00				
Communication/Outreach	37,500.00	667.24	1,850.00	0.00	0.00	34,982.76
Self-Advocate Stakeholder Reimbursement	10,000.00	0.00	0.00			10,000.00
IDR Website Redesign	20,000.00	0.00	0.00			20,000.00
Conference Exhibits/Tables	2,500.00	0.00	0.00			2,500.00
Printing	5,000.00	667.24	1,850.00			2,482.76
Misc.	5,000.00	119.98	672.50	0.00	0.00	4,207.52
Misc.	5,000.00	119.98	672.50			4,207.52
TOTAL EXPENSES	3,695,551.69	702,738.16	1,069,636.06	0.00	0.00	1,923,177.47
TOTAL INCOME	5,013,082.53	4,290,735.62	2,959,910.33	0.00	0.00	
	1,317,530.84	3,587,997.46	1,890,274.27	0.00	0.00	

HB1001

STATE BUDGET (THOMPSON J) Appropriates money for capital expenditures, the operation of the state, K-12 and higher education, the delivery of Medicaid and other services, and various other distributions and purposes. Requires a researcher to execute a data sharing agreement that is approved by the management performance hub to receive access to confidential records. Provides that the auditor of state is also known as the state comptroller. Provides that, after June 30, 2023, the auditor of state shall use the title "state comptroller" in conducting state business, in all contracts, on business cards, on stationery, and with other means of communication as necessary. Establishes the attorney general contingency fee fund. Establishes the: (1) state opioid settlement fund; and (2) local opioid settlement fund; into which funds received from opioid litigation settlements must be deposited. Provides that the office of the inspector general shall provide informal advisory opinions and that the opinions are confidential. Allows the budget committee to submit the budget report and budget bill or bills to the governor on or before the second Monday of January, or the third Monday of January in the year in which a gubernatorial election is held (instead of before that date). Requires the state personnel department to require a contractor, when contracting for health care coverage for state employees, to use value based coverage. Repeals a provision that makes a state general fund appropriation to the board of trustees of the Indiana public retirement system if the money available in the special death benefits fund is insufficient to pay death benefit claims. Allows the Indiana economic development corporation (IEDC) to certify an applicable tax credit that exceeds the maximum allowable amount after review by the budget committee. Provides that the regional economic acceleration and development initiative program expires June 30, 2026. Specifies that the county or municipality that did not approve the relocation of an outdoor advertising sign is responsible for compensation of the taking of the outdoor advertising sign. Provides that an owner may relocate an outdoor advertising sign that is subject to a pending eminent domain action. Allows an individual to claim an increased exemption amount for a dependent child in the first year in which the exemption amount may be claimed for the child. Reduces the individual income tax rate to 2.9% by 2027 and eliminates all trigger provisions in current law. Establishes the regional public safety training fund. Repeals provisions relating to the establishment of the: (1) Indiana homeland security foundation; (2) Indiana homeland security fund; and (3) fire training infrastructure fund. Allows certain members of the public employees' retirement fund or Indiana state teachers' retirement fund to file an election to begin receiving retirement benefits while holding a position. Changes the state police pre-1987 benefit and supplemental pension benefit calculation from being based on the sixth year of service to the fourth year of service. Repeals the public mass transportation fund. Repeals the financial responsibility compliance verification fund. Changes the number of years of service on which the salary matrix for state police employees is based to 15 years (instead of 20 years). Requires the department of correction to deposit the amount appropriated for the county misdemeanor fund by a county's multiplier. Requires the office of Medicaid policy and planning (office) to: (1) develop a schedule for the review of Medicaid reimbursement rates; and (2) provide a copy of the schedule to the budget committee; not later than November 1, 2023. Creates the residential water testing fund to test the water supply of an individual property owner of an eligible township. Requires the director of the state personnel department to submit a revision or adjustment to a pay plan developed for state employees to the state budget committee for review before the revision may take effect. Provides that the general assembly shall convene: (1) on the second Tuesday after the first Monday in June for the first regular technical session; and (2) on the second Tuesday after the first Monday in May for the second regular technical session. Provides that a technical session is not required to convene if the president pro tempore and the speaker jointly issue an order that convening is not necessary. Requires the general assembly to convene no later than the fourth Monday in January after organization day. Repeals provisions relating to emergency sessions and makes conforming amendments. Recouples the state earned income tax credit qualifications with the federal earned income tax credit qualifications under the Internal Revenue Code as in effect January 1, 2023. Requires a contractor that provides tangible personal property incorporated into real property in a project located in an innovation development district to maintain records of all state gross retail and use tax paid or collected during a state fiscal year. Adds state adjusted gross income taxes paid by an individual who is not an employee with respect to income received for services performed in an innovation development district for purposes of calculating income tax incremental amounts. Establishes the commission on improving the status of children fund to support the staffing and operations of the commission. Provides that a part of state user fees shall be deposited in the Indiana secured school fund. Repeals the distribution schedule for appropriations made for certain child development programs. Requires the department of local government finance to prepare an annual report and abstract concerning property tax data (instead of the auditor of state). Deletes reimbursement rate parameters for reimbursement of managed care organizations under the healthy Indiana plan. Extends the sunset of the collection of hospital assessment fees and health facility quality assessment fees from June 30, 2023, to June 30, 2025. Increases the total number of adult learner students at the Excel Centers for Adult Learners and Christel House DORS centers for whom the school may receive state funding. Establishes the Indiana education scholarship account donation fund to accept donations for administration of the Indiana education scholarship account program. Repeals the special education fund. Establishes a state tax credit for a taxpayer that makes certain qualified child care expenditures in providing child care to the taxpayer's employees. Extends provisions for the gasoline tax and the special fuel tax rates. Amends a statute concerning powers and duties of a regional water, sewage, or solid waste district established under prior law. Extends the sunset for the invasive species council and fund from July 1, 2023, to July 1, 2031. Prohibits school

corporations and charter schools from charging a fee for curricular materials to students. Provides that the parent of a student or an emancipated minor who attends an accredited nonpublic school and who meets financial eligibility requirements may request reimbursement of fees charged for curricular materials. Establishes the curricular materials fund. Requires a county auditor to distribute a portion of revenue received from an operations fund levy imposed by a school corporation located in certain counties to certain charter schools (excludes school corporations that are designated as a dist

Current Status: 4/28/2023 - Signed by the President Pro Tempore

HB1002

EDUCATION AND WORKFORCE DEVELOPMENT (GOODRICH C) Establishes the: (1) career scholarship account program (CSA program); (2) career scholarship account program fund; (3) career scholarship account administration fund; (4) career scholarship account donation fund; (5) connecting students with careers fund; (6) teacher higher education and industry collaboration grant program and fund; (7) career coaching grant fund; and (8) intermediary capacity building fund. Provides that the department of education (department), in consultation with the commission for higher education (commission), shall designate and approve a course sequence, career course, modern youth apprenticeship, apprenticeship, or program of study for grants under the CSA program. Provides for revocation of the approval if the sequence, course, modern youth apprenticeship, apprenticeship, or program of study fails to achieve an adequate outcome, as determined by the department, in consultation with the commission. Establishes eligibility requirements to participate in the CSA program. Provides that the commission may approve participating entities that meet certain requirements to participate in the CSA program. Provides that grant amounts that career scholarship students receive are not included in adjusted gross income for tax purposes. Provides that, beginning July 1, 2024, certain school corporations shall include instruction for all students regarding career awareness. Provides that the state board of education (state board), in consultation with the commission, shall create certain standards for a career awareness course. Requires the department to collect and aggregate certain data. Requires the department to publish on the department's website a list of skill competencies identified by certain approved participating entities. Requires the state board, in consultation with the department, to establish new high school diploma requirements. Removes a provision that provides that a student who satisfies an Indiana diploma with a Core 40 with academic honors designation through a certain alternative course shall not count toward a school's honor designation award. Requires the commission to create a list of approved intermediaries, employers, and labor organizations. Requires certain high school and college students to meet with an approved postsecondary educational institution, an intermediary, an employer, or a labor organization. Requires certain committed offenders to meet with an intermediary, employer, or labor organization. Provides that during each school year, a public high school must hold at least one career fair during regular school hours. Amends requirements for certification of qualified education programs by INvestED Indiana. Repeals certain provisions in law regarding a comprehensive navigation and coaching system and career coaching grant fund and requires the commission to: (1) develop and implement a comprehensive career navigation and coaching system for Indiana; and (2) award grants from the career coaching grant fund to certain eligible entities to establish or implement comprehensive career navigation and coaching systems. Provides that the department shall approve career coaching providers for the purpose of eligibility for a career coaching grant. Provides that the commission shall receive, distribute, and account for all funds received for career and technical education under the Carl D. Perkins Vocational and Applied Technology Act. Requires the department to establish and maintain an online platform that allows teachers to access and share information regarding connecting daily classroom lessons with innovations in workplace practices and postsecondary education research. Repeals provisions relating to the industry collaboration certification program. Repeals and replaces a definition of "participating entity" with "ESA participating entity".

Current Status: 4/28/2023 - Signed by the President Pro Tempore

HB1006

MENTAL HEALTH PROGRAMS (STEUERWALD G) Specifies the circumstances under which a person may be involuntarily committed to a facility for mental health services and specifies that these services are medically necessary when provided in accordance with generally accepted clinical care guidelines. Establishes a local mental health referral program to provide mental health treatment for certain persons who have been arrested. Repeals obsolete provisions and makes technical corrections.

Current Status: 4/28/2023 - Signed by the President Pro Tempore

HB1091

ELIGIBILITY UNDER MEDICAID, CHIP AND OTHER BENEFITS (VERMILION A) Changes the requirements for submitting eligibility information for an individual who is: (1) less than 19 years of age; and (2) a recipient of either the Medicaid program or the children's health insurance program (CHIP) (programs). (Current law concerning the submission of eligibility information in the programs applies to individuals less than three years of age.) Provides Medicaid eligibility for certain individuals who have immigrated and are lawfully residing in the United States and meet other Medicaid eligibility requirements. Specifies eligibility for the children's health insurance program (CHIP) for lawfully residing individuals who are less than 19 years of age. Provides that an agency or political subdivision is not required to verify citizenship or immigration status of an individual for purposes of the individual's eligibility for benefits under the Richard B. Russell National School Lunch Act or the Child Nutrition Act of 1966, including the special supplemental food program for women, infants, and children.

- HB1157 RESIDENTIAL HOUSING DEVELOPMENT PROGRAM (MOED J) Makes the following changes regarding Marion County redevelopment: (1) Revises allocation area requirements for the redevelopment commission (commission) to establish a housing program. (2) Allows the commission to establish a residential housing development program (residential housing program) and a tax increment funding allocation area for the residential housing program, if the construction of new houses fails to reach a benchmark. Requires the department of local government finance, in cooperation with the city of Indianapolis, to determine eligibility for the residential housing program. Specifies the rights, powers, privileges, and immunities of the commission in implementing a residential housing program.
Current Status: 4/26/2023 - Signed by the President of the Senate
- HB1160 WORKFORCE DEVELOPMENT PILOT PROGRAMS (CLERE E) Provides that the commission for higher education may establish an education and career support services pilot program to provide career and support services to adult students of state educational institutions. Provides that the office of the secretary of family and social services (FSSA), in consultation with Erskine Green Training Institute and the department of workforce development, may establish a manufacturing workforce training pilot program to provide training and other services to: (1) individuals with intellectual and other developmental disabilities; and (2) incumbent workers who are identified to fill higher paying jobs as a result of increased workforce participation by individuals with intellectual and other developmental disabilities. Specifies requirements and permitted actions for each pilot program. Requires FSSA to amend administrative rules.
Current Status: 4/28/2023 - Signed by the President Pro Tempore
- HB1172 PATERNITY ACTIONS (CLERE E) Allows a child, by the child's next friend, to commence a child custody proceeding under certain circumstances. Defines "next friend." Provides that a court having jurisdiction over a child who is the subject of a child in need of services proceeding or juvenile delinquency proceeding has concurrent jurisdiction with a court having jurisdiction over a paternity proceeding for the purpose of establishing or modifying paternity, custody, parenting time, or child support of the child.
Current Status: 4/20/2023 - Signed by the Governor
- HB1186 ENCROACHMENT ON AN INVESTIGATION (MCNAMARA W) Provides that a person who knowingly or intentionally approaches within 25 feet of a law enforcement officer after the law enforcement officer has ordered the person to stop commits a Class C misdemeanor. Specifies that "emergency incident area" may include an area 25 feet in all directions from the perimeter of an emergency incident area. (Under current law, the area is 150 feet).
Current Status: 4/20/2023 - Signed by the Governor
- HB1201 RARE DISEASE ADVISORY COUNCIL (LEDBETTER C) Establishes the rare disease advisory council (council) to address various issues concerning the needs of patients in Indiana with rare diseases and their caregivers and providers. Establishes duties and procedures of the council. Requires the Indiana department of health to provide administrative assistance to and pay the administrative expenses of the council.
Current Status: 4/26/2023 - Signed by the President of the Senate
- HB1321 PUBLIC SAFETY TRAINING (GARCIA WILBURN V) Requires the law enforcement training board to establish minimum standards for basic training and annual inservice training that address the mental health and wellness of law enforcement officers. Requires the executive training program to include training in mental health and wellness and suicide prevention of law enforcement officers. Provides that the mental health and wellness training may be provided online or by other means of virtual instruction. Provides that full-time firefighters' minimum training and annual training requirements must include mental health and wellness training. Requires certain persons who provide emergency medical services to obtain mental health and wellness training as a condition of licensure and certification.
Current Status: 4/26/2023 - Signed by the President of the Senate
- HB1334 ABSENTEE VOTING (WESCO T) Provides that an agency of the state or a political subdivision may not provide an individual with an application for an absentee ballot unless requested by the individual or a member of the individual's family. Provides that an absentee ballot application must request that the applicant include: (1) certain identification numbers; or (2) a photocopy of: (A) the applicant's Indiana driver's license, (B) the applicant's Indiana identification card number for nondrivers, or (C) other specified proof of identification. Provides that the application form must state that an applicant may include only one of the identification numbers or one of the documents, but the application may be delayed if the county election board cannot match at least one of the numbers with the voter's registration record. Allows an individual to provide, for purposes of accessing an absentee ballot application submitted in an electronic format: (1) the individual's Indiana identification card number for nondrivers; or (2) the unique identifying number assigned to the voter's registration record in the computerized list; as an alternative to the options available under current law. (Current law requires the provision of the individual's Indiana driver's license number or the last four

digits of the individual's Social Security number.) Specifies that certain information and documentation is confidential. Specifies when a county voter registration office is required to redact particular confidential information. Requires a county election board to implement specified procedures if the county election board cannot match at least one of the numbers with the voter's registration record. Requires the bureau of motor vehicles (BMV) to provide particular information each day to the secretary of state (secretary) and the election division. Requires the secretary and the election division to provide specified information to each county voter registration office. Specifies that if certain information provided by the BMV is not a part of the voter's registration record, the county voter registration office shall update the voter's registration record to include this information. Requires a circuit court clerk or director of a board of elections and registration (clerk) to transmit certain information to an applicant who submits an application to receive an absentee ballot by mail if the application does not fully comply with particular laws. Specifies a process by which a clerk may: (1) deliver a second absentee ballot application; (2) approve a second absentee ballot application; and (3) provide an absentee ballot; to a voter who timely submits a defective application to receive an absentee ballot. Provides that a voter who receives an absentee ballot under certain provisions may return the voted ballot: (1) in person to the absentee voter board; or (2) to the county election board; before the deadline for receipt of absentee ballots. Requires uniform application if a clerk uses this provision. Makes conforming changes.

Current Status: 4/26/2023 - Signed by the President of the Senate

HB1336

VARIOUS ELECTION LAW MATTERS (WESCO T) Adds the U.S. Space Force to the definition of "uniformed services" in election law. Provides that electronic signatures may be used for the reporting of campaign contributions and expenditures. Provides that election form approval procedures do not apply to a form incorporated only into the statewide voter registration system. Makes other technical changes relating to approval of election forms. Provides that a statute prohibiting the use of the circuit court clerk's name on a ballot if the clerk is a candidate for an office on the ballot does not apply if the only office for which the individual is a candidate is a political party office. Requires a candidate to specify on the candidate's candidacy document each designation that the candidate wants to use on the ballot. Requires the election division to design all candidacy documents so that the form of the document enables the candidate to insert in a separate field of the document each of the separate designations that a candidate is permitted to use under election law. Provides that an individual is considered to have resigned as an elected official of a unit when the person becomes an employee of the unit the individual serves as an elected official. Provides that certain mailings required by election law be sent by first class mail with tracking rather than by certified mail. Provides that a statute that permits removal and fining of a precinct election officer who fails to perform duties is applicable to an absentee voter board member and to an absentee ballot counter. Authorizes a county election board to permit individuals who are candidates for certain political party offices and relatives of such individuals to serve as precinct election officers if the county election board finds that enough individuals are not available to serve as precinct election officers. Requires the bureau of motor vehicles commission to forward the voter registration part of an application and any declination to register to the election division for transmittal to the appropriate county voter registration office. Adds law enforcement agencies that receive voter registrations to the list of voter registration agencies that are not subject to certain requirements relating to filing voter registration applications. Provides that the statewide voter registration system must contain a feature that identifies potential nonresidential addresses submitted on voter registration applications. Provides additional procedures for updating a copy of a voter's original signature in the statewide voter registration file. Adds judges of city and town courts to the list of officials that must file a statement of economic interest before filing a candidacy document. Provides that an officeholder is not entitled to salary until a statement of economic interest is filed, if required. Provides that, for purposes of determining whether a candidate is affiliated with a particular major political party, the candidate must have voted in that party's two most recent primary elections. (Under current law, a candidate is required to have voted in the political party's most recent primary election.) Provides that if an election district is included entirely within one precinct, and does not include the entire precinct, the petition of nomination must be signed by at least five voters of the election district. Provides that if a special election to fill a vacancy in the office of United States Representative is held on the same day of the election to elect the individual to serve in the succeeding term, an individual may appear on the ballot as a candidate in both elections. Provides that in such an election for United States Representative, the ballot must list the election to fill the office vacancy immediately after the election for the next term of the office. Requires the chair of a political committee to file a final report for a treasurer if the treasurer has died or is otherwise unable to file the report. Provides that the statute requiring reporting of "large" campaign contributions does not require the reporting of a contribution unless it is accepted by the candidate's candidate committee. Provides language for printing on ballots when no candidate has filed for the office. Eliminates the requirement that counties send duplicate copies of state election returns to the election division. Provides that a county executive is not required to establish precincts so that a precinct contains not more than 2,000 active voters or 2,300 active voters if the precinct is in a county designated as a vote center county. Provides that in addition to precinct boundaries, the name of a precinct as included in the federal decennial census data becomes the official name of the precinct. Requires that a ballot be arranged so that all candidates for the same office appear on the same page or the same screen. Permits the use of an electronic device at a precinct or vote center to display a sample ballot. Provides procedures for ballot layout when a candidate dies or is no longer eligible to appear on the ballot. Requires a circuit court clerk who receives an absentee ballot application from a voter who is not registered to vote in the county to send the application to the circuit court clerk of the county in which the voter is registered. Provides that the designation of a voter as an absent uniformed services voter, an overseas voter, or a

voter with print disabilities expires January 1 after such a voter has submitted an absentee ballot application indicating such designation. Provides that, after December 31, 2024, all absentee ballots must be printed on security paper that incorporates features that can be used to authenticate the ballot. Provides that a voter must file residence documentation before 6 p.m. on election day. Provides that only the individuals who are permitted to be in the polls on election day are permitted to be in the room where early absentee voting is occurring. Provides that a county election board may send a signed form from a public test to the election division by electronic mail or fax. Provides that an application fee for certification of a voting system does not apply if the application is for a de minimis change. Authorizes the repurposing of an electronic poll book unit as a device to display sample ballots if the electronic poll book software is deleted from the unit. Requires absentee ballot counters to begin counting absentee ballots beginning at 6:00 a.m. on election day if certain conditions are met. Provides that if there is a discrepancy on political party primary ballot choice between the federal write-in absentee ballot and the federal post card application, the federal post card application supersedes the federal write-in absentee ballot. Provides that if an individual who holds a local office is elected to another term in that office and subsequently dies or is disqualified before the next term is scheduled to begin, a vacancy is created that must be filled as otherwise provided by law. Adjusts the schedule for conducting a post-election audit if a contest or recount has been filed affecting the county. Provides that a notice of death of a local office holder is required to be filed only with the circuit court clerk. (Under current law, notice must also be filed with the prosecuting attorney.) Exempts a member of a fiscal or legislative body from assuming certain duties during a vacancy. Requires a magistrate to depose

Current Status: 4/28/2023 - Signed by the President Pro Tempore

HB1342 DIRECT SUPPORT PROFESSIONALS (OLTHOFF J) Requires the division of disability and rehabilitative services (division) to establish and maintain a direct support professional registry and to make the registry available to authorized division personnel and authorized service providers. Requires a direct support professional to register with the division in order to provide direct support services. Requires the division to adopt rules to implement the registry, including establishing definitions and levels for substantiated abuse, neglect, and exploitation, the highest of which is the minimum the division must report to the registry. Requires the division to consult with stakeholders and establish a tiered training certification program for direct support professionals. Requires the division to issue a request for proposals before January 1, 2024, to operate the training program. Requires the division to make every effort to contract with a vendor for the training program not later than January 1, 2025. Requires a selected vendor to begin operating the training program before July 1, 2025. Requires the division to first use any funds available from the federal American Rescue Plan Act in developing the registry before using other available funds. Allows the division to use any federal dollars available for the registry and training. Requires the division to apply to the federal government for approval of Medicaid reimbursement for services provided by a direct support professional.

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Notes: As of 1/24, would forbid individuals from serving as a DSP after 1/25 if they are not signed up as a registered DSP, but earlier language at the beginning of the bill notes that DSPs are employed by an 'authorized service provider,' which may potentially lead to conflict when self-direction is implemented. Bill also requires the Division to create competency-based training after consulting with 'stakeholders who do not have a conflict of interest,' which probably needs to be limited to a financial interest. Training applies to individuals with intellectual and/or developmental disabilities, which is interesting, given that the TBI and A&D Waivers are being transferred.

HB1352 TELEHEALTH SERVICES (LEDBETTER C) Provides (beginning January 1, 2024) that the office of Medicaid policy and planning may not require: (1) a provider that is licensed, certified, registered, or authorized with the appropriate state agency or board and exclusively offers telehealth services to maintain a physical address or site in Indiana to be eligible for enrollment as a Medicaid provider; or (2) a telehealth provider group with providers that are licensed, certified, registered, or authorized with the appropriate state agency or board to have an in-state service address to be eligible to enroll as a Medicaid vendor or Medicaid provider group.

Current Status: 4/28/2023 - Signed by the President Pro Tempore

HB1354 SERVICE ANIMALS (LEDBETTER C) Provides that only a dog or miniature horse qualify as a service animal. Provides that a public accommodation shall make reasonable modifications in policies, practices, or procedures to permit the use of a miniature horse by an individual with a disability. Sets forth certain requirements when permitting or not permitting a person with a disability to bring a service animal on the premises of a public accommodation.

Current Status: 4/28/2023 - Signed by the President Pro Tempore

HB1422 DEMENTIA CARE (PORTER G) Provides that an area agency on aging designated by the bureau of aging services (area agency) may establish a dementia care specialist program. Allows an area agency to designate at least one individual as a dementia care specialist to administer the program. Provides that the division of aging (division) may employ a dementia care specialist coordinator. Sets forth the duties of: (1) a dementia care specialist; and (2) the

dementia care specialist coordinator; if an area agency or the division establishes those positions. Makes conforming changes.

Current Status: 4/26/2023 - Signed by the President of the Senate

HB1458 DOCTOR SCOPE OF TREATMENT AND DO NOT RESUSCITATE (BARRETT B) Provides that a declarant may include a person for whom a proxy has executed an out of hospital do not resuscitate (DNR) declaration if the person: (1) is at least 18 years of age and is certified as a qualified person; (2) is incapacitated or incompetent; and (3) has no representative who is able and available to execute an out of hospital DNR declaration. Defines "incapacitated" as related to an out of hospital DNR declaration. Defines "proxy" as related to an out of hospital DNR declaration and a physician order for scope of treatment (POST). Provides that a person's proxy may execute an out of hospital DNR declaration if certain conditions are met. Creates a declaration and order form to be used by hospitals if the declarant is incapacitated or incompetent. Allows a qualified person's proxy to complete a POST form if the person is incapable of making health care decisions and no representative is able and available to act. Allows a proxy to revoke a POST form or request alternative treatment. Provides that if alternative treatment is requested, the treating medical provider shall review the POST form with the declarant, the declarant's representative, or the proxy who has priority to act for the declarant. Makes conforming changes.

Current Status: 4/20/2023 - Signed by the Governor

HB1460 PROFESSIONAL AND OCCUPATIONAL LICENSING (BARRETT B) Allows a board that regulates a health care provider or a regulated professional under IC 25 to use electronic means of communication to conduct meetings if certain requirements are met. Allows the Indiana department of health (state department) to collect certain information from individuals who provide home health services, are a qualified medication aide, or are a certified nurse aide. Adds the board of physical therapy and the state department's consumer services and health care regulation commission for purposes of workforce renewal information and an annual report. Establishes time periods for the professional licensing agency (PLA) to post meeting agendas and meeting minutes on the applicable board's website. Requires the PLA to post certain information concerning board vacancies and application forms. Requires the PLA to send notification to an applicant of incomplete items in an application. Requires that new and renewed licenses with the PLA be submitted electronically, unless a paper application is requested. Requires the PLA to post on its website information about the number of licenses issued and wait times for the licenses. Requires the governor to fill a vacancy on certain occupational boards within 90 days. Allows the PLA to make an appointment to the board if the governor does not make the appointment. Allows the board to issue a temporary permit for a registered nurse applicant and a licensed practical nurse applicant.

Current Status: 4/26/2023 - Signed by the President of the Senate

HB1461 LONG TERM SERVICES (BARRETT B) Requires the housing and community development authority to: (1) assess the feasibility of the development of new assisted living communities for low and middle income individuals; and (2) determine possible funding for the assisted living communities; and submit a report to the legislative services agency. Requires the office of the secretary of family and social services (office) to contract with more than one entity to provide functional eligibility determinations for individuals applying for the aged and disabled Medicaid waiver. Requires the office to report to the budget committee and legislative council certain information concerning: (1) the average length of time to conduct function eligibility assessments; and (2) a plan to provide functional eligibility not later than 72 hours from the eligibility assessment. Removes the requirement that the transfer of comprehensive care beds in a health facility must equalize the number of certified Medicaid beds in the county. Allows a health facility that transfers comprehensive care beds to reduce the facility's count of licensed comprehensive care beds by the number of beds transferred. Allows the receiving facility to increase the: (1) count of licensed comprehensive care beds; and (2) number of beds that are Medicaid certified. Requires the office to reimburse the provider of assisted living services if an increase in the level of services for a recipient is approved by the office. Specifies that integrated health care coordination and transportation are assisted living services. Prohibits the office from reducing the scope of services that may be provided by an assisted living services provider under the Medicaid aged and disabled waiver, as in effect on July 1, 2021. Specifies provisions that must be included in a risk based managed care program or capitated managed care program for specified Medicaid recipients. Requires the Indiana department of health (state department) to establish and administer the registration of a temporary health care service agency. Repeals current laws concerning the regulation of employment services. Removes references to a residential care facility administrator as a separate classification of license. Sets forth requirements for health facility administrators, residential care facility administrators, administrators in training, preceptors, and student interns. Sets forth notification requirements to the state department upon a vacancy or new hire of a residential care administrator. Makes conforming changes.

Current Status: 4/26/2023 - Signed by the President of the Senate

Notes: As of 1/24, promotes the establishment of new assisted living communities and would require that Medicaid reimburse assisted living facilities extra for providing transportation to residents. Also defines an HHA as 'healthcare personnel.'

HB1483 DISCIPLINE RULES REGARDING BULLYING (SMITH V) Provides that discipline rules adopted by the governing body

of a school corporation must include timetables for reporting bullying incidents to parents of both the targeted student and the alleged perpetrator in an expedited manner that is not later than five business days after the incident is reported. (Current law provides that discipline rules adopted by the governing body of a school corporation must include timetables for reporting bullying incidents to parents of both the targeted student and the bully in an expedited manner.) Provides that discipline rules adopted by the governing body of a school corporation: (1) must include provisions that require a school to prioritize the safety of the victim; (2) may include provisions to determine: (A) the severity of an incident of bullying; and (B) whether an incident of bullying may warrant the transfer of the victim or the alleged perpetrator to another school in the school corporation; and (3) must include policies to allow a parent of a child in the school corporation to review any materials used in any bullying prevention or suicide prevention program. Requires public schools to document acts of bullying and abusive behaviors against a victim and committed by a verified perpetrator.

Current Status: 4/28/2023 - Signed by the President Pro Tempore

HB1492

SCHOOL SAFETY (MCNAMARA W) Makes changes to the permissible uses of the Indiana secured school fund. Moves provisions in the Indiana Code pertaining to the appointment of a school safety specialist, school safety specialist programs, and school safety plans. Makes changes to the Indiana secured school fund application procedures. Makes changes to the Indiana secured school fund reporting requirements. Makes various changes to provisions regulating the appointment of a school safety specialist, school safety specialist program, and school safety plans. Requires before December 31, 2023, that each county shall establish a county school safety commission. (Current law provides that a county may establish a county school safety commission.) Requires each school corporation and charter school to establish a safe school committee. Requires the division of school building physical security and safety of the department of education to establish and maintain guidelines, in consultation with the department of homeland security and institute for criminal justice, for developing and maintaining school safety plans and assist the secured school safety board in conducting the review and submitting certain reports. Provides that the governing body of a school corporation or charter school organizer shall: (1) approve or disapprove all school safety specialists chosen by the superintendent of the school corporation or leadership of the charter school; and (2) review the school safety plan. Makes changes to the duties of a school resource officer. Makes changes to information reported by a school corporation or charter school pertaining to a school resource officer that is reported to the department of homeland security. Requires the secured schools safety board to include certain aggregate information relating to the number of school resource officers employed by schools. Provides that an organizer of a charter school shall require each charter school under the authority of the organizer to conduct annual emergency preparedness drills. Makes changes to distribution amounts from the state user fee fund. Makes conforming amendments. Repeals provisions establishing the Indiana safe schools fund, school safe haven programs, and existing provisions relating to the establishment of school safety specialists, county school safety commissions, school safety specialist training and safe school programs. Defines various terms. Provides that a school corporation, charter school, or accredited nonpublic school may receive a matching grant from the Indiana secured school fund to purchase student safety management technology. Makes a technical correction.

Current Status: 4/26/2023 - Signed by the President of the Senate

HB1513

FSSA MATTERS (BARRETT B) Changes the name of the bureau of developmental disabilities services to the bureau of disabilities services. Removes certain members from the 211 advisory committee. Repeals Medicaid copayment provisions that: (1) require the office of the secretary of family and social services (office) to apply a copayment for certain Medicaid services; (2) require a recipient to make a copayment upon the receipt of services and for a provider not to voluntarily waive a copayment; (3) set forth exemptions from copayment requirements; and (4) require the provider to charge the maximum allowable copayment. Allows for an enrollment fee, a premium, a copayment, or a similar charge to be imposed as a condition of an individual's eligibility for the healthy Indiana plan and the children's health insurance program. Removes a prohibition on the office from: (1) requiring certain providers to submit non-Medicaid revenue information in the provider's annual historical financial report; and (2) only requesting balance sheets from certain providers that apply directly to the provider's facility. Allows the office to implement an end of therapy reclassification methodology in a successor of the RUG-IV, 48-Group model for payment of nursing facility services.

Current Status: 4/28/2023 - Signed by the President Pro Tempore

HB1591

VARIOUS EDUCATION MATTERS (BEHNING R) Requires the Indiana archives and records administration to: (1) establish procedures to retain an original record, document, plat, paper, or instrument-in-writing in an electronic format; (2) establish a period of time after which an original record, document, plat, paper, or instrument-in-writing may be destroyed; and (3) prepare and submit, not later than November 1, 2023, a report to the general assembly regarding these matters. Amends the duties of the early learning advisory committee. Changes the prekindergarten pilot program to the prekindergarten program and removes the expiration date. Provides that, at least once every five years, the office, in cooperation with the department of education (department), must carry out a longitudinal study regarding students who participate in the prekindergarten program. Amends requirements regarding cardiopulmonary resuscitation (CPR) for child care centers, child care homes, and child care ministries. Requires: (1) each public school to provide information to the department concerning certain physical injuries to employees; and (2) the

department to report the information on the department's website. Requires the department to provide certain information to public schools and state accredited nonpublic schools and requires each school to post the information on the school's website home page. Amends innovation network school and participating innovation network charter school provisions regarding: (1) certain agreement requirements and limitations; (2) appeals to the state board of education regarding the failure to follow an agreement renewal process; and (3) negotiating the requirement of specific services. Allows an innovation network team or organizer to enter into an agreement with a school corporation to transfer the ownership of a school corporation facility to the team or organizer and provides that a transfer is not subject to provisions in the law concerning the transfer of vacant school buildings to charter schools. Provides that a school corporation may not require an innovation network team or an organizer to contract for specific goods or services provided by the school corporation or any other entity. Requires information regarding certain possible criminal activity, concluded personnel matter investigations, and matters involving legal expenses be provided to the governing body of a school corporation. Provides that at-risk students who are receiving certain educational services are not included in a public school's four year graduation rate and are included in an eligible school's graduation rate under certain conditions. Amends the definition of "teacher" regarding certain teacher compensation provisions and requires a school corporation to expend at least 62% of the school corporation's state tuition support on teacher compensation. (Current law requires a school corporation to expend at least 45% on full-time teacher salaries.) Requires special education grade 8 through 12 case conference committees to discuss decision making skills and alternatives to appointing a guardian. Requires the department to, subject to appropriation by the general assembly, provide schools the same per pupil exam fee amounts for international baccalaureate and Cambridge International exams as is provided for advanced placement exams. Provides that: (1) any course that meets the requirements of a career and technical education program may be taught virtually by a virtual provider if certain conditions are met; and (2) the virtual course is eligible for a career and technical education grant. Amends the definition of "school scholarship", with regard to scholarship granting organizations. Removes a provision that requires choice scholarship schools to conduct random drawings in a public meeting if applicants for enrollment exceed the number of choice scholarships available to the school. Provides that the state board shall assign to a school or school corporation (including adult high schools) a "null" or "no letter grade" for the 2022-2023 and 2023-2024 school years. Provides that, when developing a proposal for a revised school performance designation, the department shall consider using certain metrics.

Current Status: 4/28/2023 - Signed by the President Pro Tempore

SB1 BEHAVIORAL HEALTH MATTERS (CRIDER M) Provides that, subject to certain procedures and requirements, the office of the secretary of family and social services may apply to the United States Department of Health and Human Services: (1) for a Medicaid state plan amendment, a waiver, or an amendment to an existing waiver to require reimbursement for eligible certified community behavioral health clinic services; or (2) to participate in the expansion of a community mental health services demonstration program. Requires the division of mental health and addiction to establish and maintain a help line: (1) to provide confidential emotional support and referrals to certain resources to individuals who call the help line; and (2) that is accessible by calling a toll free telephone number. Establishes the Indiana behavioral health commission (commission) and sets forth the commission's membership. Changes the name of the "9-8-8 crisis hotline center" to "9-8-8 crisis response center". Makes conforming changes.

Current Status: 4/24/2023 - Signed by the President Pro Tempore

Notes: February 2 – Amendment #2, taken by consent in the Appropriations Committee, 'streamlined' Behavioral Health Commission membership by reducing it to eight participants. The single designated member required to have lived experience was eliminated.

January 25 – Tom Crishon submitted written comments to the Senate Appropriations Committee, describing the benefits 988 will bring to the disability community and suggesting that more individuals with lived experience be added to the Indiana Behavioral Health Commission.

SB4 PUBLIC HEALTH COMMISSION (CHARBONNEAU E) Defines "core public health services" for purposes of public health laws. Adds members to the executive board of the Indiana department of health (state department). Removes a provision allowing the state department to establish branch offices. Provides that the state department may provide services to local health departments. Requires each local board of health to establish a local public health services fund to receive state funding. Provides a method of allocation of state funding to local boards of health, subject to state appropriations. Specifies the percentage of how additional funding may be expended on core public health services. Allows the local health department to enter into contracts or approve grants for core public health services. Allows the state department to issue guidance to local health departments. Requires the state department to make annual local health department reports available to the public. Changes the qualification requirements for a local health officer and requires certain training. Requires the state department to identify state level metrics and county level metrics and requires certain local health departments to report to the state department activities and metrics on the delivery of core public health services. Requires the state department to annually report on the metrics to the budget committee and publish information concerning the metrics on the Internet. Requires that a local health

department post a position or contract for the provision or administration of core public health services for at least 30 days. Requires a local health department to provide certain education before administering a vaccine. Requires a multiple county health department to maintain at least one physical office in each represented county. Provides that a new city health department cannot be created after December 31, 2022, but allows current city health departments to continue to operate. Creates the Indiana trauma care commission. Allows a school corporation that cannot obtain an ophthalmologist or optometrist to perform the modified clinical technique vision test to conduct certain specified vision screenings. Requires the school to send to the parent of a student any recommendation for further testing by the vision screener. Allows for standing orders to be used for emergency stock medication in schools. Allows the state health commissioner or designee to issue a statewide standing order, prescription, or protocol for emergency stock medication for schools. Removes the distance requirement for an access practice dentist to provide communication with a dental hygienist. Repeals provisions concerning the Indiana local health department trust account.

Current Status: 4/28/2023 - Signed by the President of the Senate

Notes: February 1 – Emily Munson submitted written comments suggesting that individuals with lived disability experience should be added to the membership of the Public Health Commission, as well as local health boards. The comments explained the disparate impact people with disabilities experienced during the COVID-19 pandemic, partially due to the fact that the Indiana Department of Health failed to include anyone with lived disability experience on their workgroups and taskforces.

SB287

VARIOUS PROBATE AND TRUST MATTERS (FREEMAN A) Provides that a person may sign a form of living will declaration or a form of life prolonging procedures will declaration in the presence of a notary public. Removes nonconforming language in a petition for administration statute. Clarifies the service requirements for certain probate notices. Provides that a testator or a testator's agent may send written notice of the existence of a will to certain persons. Provides that if a testator's will includes a provision exercising a power of appointment, the testator or the testator's agent may notify certain persons of the existence of the will. Provides that a written notice of the existence of a will contains certain information. Provides for a procedure to contest certain wills. Provides that if a notice to contest the validity of a trust pertains to a trust created by a settlor who is still living, a complete copy of the trust instrument must be sent with the notice to each recipient. Sets forth certain complaint and notice requirements if a trust is being contested. Allows a court to increase, decrease, or waive the bond amount that: (1) a nonresident personal representative; or (2) a personal representative who becomes a nonresident; is to file in order to administer an unsupervised estate. Sets forth the requirements for: (1) a verified petition for a confidential health disclosure order; and (2) the court procedures after the verified petition is filed. Provides that if a settlor revokes a revocable trust and the trustee does not deliver the trust property, the remaining trust property becomes part of the revoking settlor's probate estate. Provides that certain grantors are entitled to reimbursement from a trust for certain taxes. Provides that an individual may execute certain authority for an application for public benefits on behalf of the individual. Sets forth requirements for the enforcement of a portability agreement contained within a premarital agreement or postmarital agreement. Makes conforming and clarifying changes. (The introduced version of this bill was prepared by the probate code study commission.)

Current Status: 4/20/2023 - Signed by the Governor

SB380

VARIOUS EDUCATION MATTERS (RAATZ J) Requires each school corporation to publish on the school corporation's website the graduation rate for each high school in the school corporation. Amends the definition of "graduation" for purposes of the high school graduation rate determination. Provides that credit for an algebra course earned under certain conditions must count toward the credit requirements for an academic honors diploma. Allows a school corporation to adopt a policy concerning dress code or distractive behavior.

Current Status: 4/28/2023 - Signed by the President Pro Tempore

SB400

HEALTH CARE MATTERS (BROWN L) Requires the state employee health plan, policies of accident and sickness insurance, and health maintenance organization contracts to provide coverage for wearable cardioverter defibrillators. Specifies requirements for credentialing a provider for the Medicaid program, an accident and sickness insurance policy, and a health maintenance organization contract. Establishes a provisional credential until a decision is made on a provider's credentialing application and allows for retroactive reimbursement. Provides that a hospital's quality assessment and improvement program must include a process for determining and reporting the occurrence of serious reportable events. Provides that the medical staff of a hospital may make recommendations on the granting of clinical privileges and the appointment or reappointment of an applicant to the governing board for a period not to exceed 36 months. Requires a hospital with an emergency department to have at least one physician on site and on duty who is responsible for the emergency department. Requires the legislative services agency to conduct an analysis of licensing fees and provide a report to the budget committee. Allows the commissioner of the department of insurance (commissioner) to issue an order to discontinue a violation of a law (current law specifies orders or rules). Requires the commissioner to consider specified information before approving or disapproving a premium rate increase. Requires a domestic stock insurer to file specified information with the department of insurance. Prohibits the state employee health plan from requiring prior authorization for certain specified services. Changes prior

authorization time requirements for urgent care situations. Adds an employee benefit plan that is subject to the federal Employee Retirement Income Security Act of 1974 and a state employee health plan to the definition of "health payer" for the purposes of the all payer claims data base (data base). Allows the department of insurance to adopt rules on certain matters concerning the data base. Requires a health plan to post certain information on the health plan's website. Prohibits an insurer and a health maintenance organization from altering a CPT code for a claim or paying for a CPT code of lesser monetary value unless: (1) the CPT code submitted is not in accordance with certain guidelines and rules, or the terms and conditions of a participating provider's agreement or contract with the insurer or health maintenance organization; or (2) the medical record of the claim has been reviewed by an employee or contractor of the insurer or health maintenance organization. Requires an insurer and a health maintenance organization to provide a contracted provider with a current reimbursement rate schedule at specified times. Urges the study by an interim committee of: (1) prior authorization exemptions for certain health care providers; and (2) whether Indiana should adopt an interstate mobility of occupational licensing. Requires a collaborating physician or physician designee to review certain patient encounters performed by a physician assistant within 14 business days. Requires a health plan to offer a health care provider the option to request a peer to peer review by a clinical peer concerning an adverse determination on a prior authorization request.

Current Status: 4/28/2023 - Signed by the President Pro Tempore

SB438

HOME HEALTH SERVICES (QADDOURA F) Requires the office of the secretary of family and social services to: (1) perform a comprehensive review of existing home health services for children with complex medical needs; (2) assess the home health services and policies for a person-centered approach; and (3) engage stakeholders in the assessment to solicit feedback on issues securing and maintaining home health services.

Current Status: 4/26/2023 - Signed by the President of the Senate

SB474

HOME HEALTH AGENCIES (BECKER V) Allows a home health agency to: (1) provide services in any county in Indiana; and (2) satisfy supervising home health aide services requirements by complying with federal law. Allows: (1) the Indiana department of health (state department) to adopt rules concerning the oversight and supervision of the services a home health agency provides in noncontiguous counties; and (2) the state health commissioner to waive rules adopted concerning home health agencies if certain conditions are met. Provides that a home health agency is not required to conduct a preemployment physical on a job applicant before the individual has contact with a home health agency patient. Allows a registered home health aide to administer gastrointestinal and jejunostomy tube feedings to a specific patient if specified conditions are met. Requires the state department to approve at least one training curriculum concerning the administration of tube feedings. Repeals laws concerning drug testing of home health agency employees.

Current Status: 4/26/2023 - Signed by the President of the Senate

Notes: February 1 – Emily Munson submitted written comments noting that nurse delegation to home health aides will ease some of the difficulty that people with disabilities who require skilled nursing care have in finding caregivers. However, the comments also suggested that completely eliminating drug testing requirements for home health aides will jeopardize the safety of some people with disabilities. IDR suggested that the bill be amended to require drug testing only when the home health agency has reasonable suspicion that a home health aide is under the influence of drugs or alcohol while working.