Creating Adoption Assistance Subsidy Review Records

Knowledge Base Article

Creating Adoption Assistance Subsidy Review Records

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Ohio Department of Children & Youth

# Creating Adoption Assistance Subsidy Review Records

Overview

This document outlines the process for entering an adoption subsidy review. This includes all Review types for Adoption Assistance: Modification, Redetermination, Notice of Suspension, Suspension, Notice of Termination and Termination. The document depicts the instructions by section.

Navigating to the Subsidy and Review History Screen

From the Ohio SACWIS Home screen:

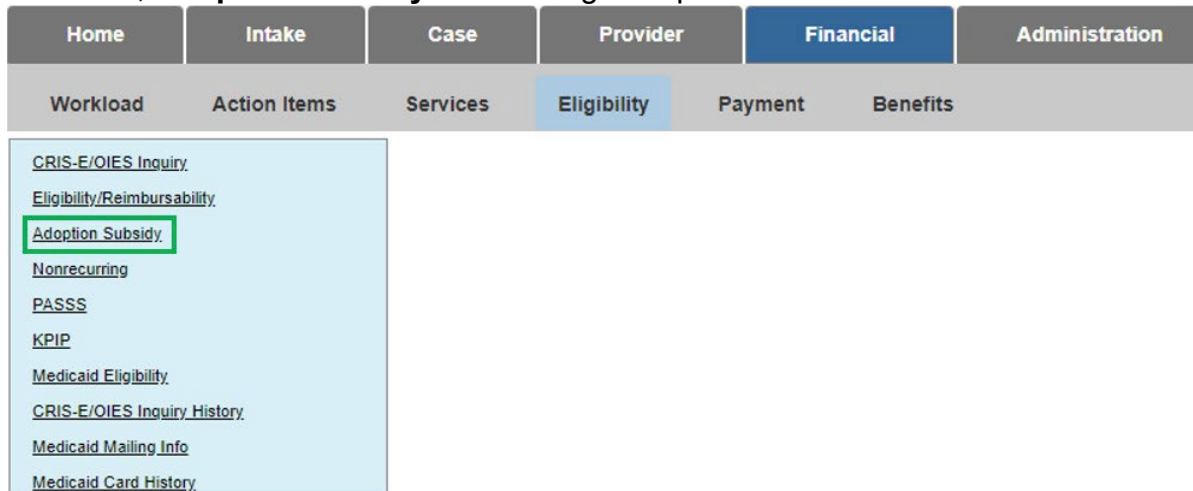1. Click the **Financial** tab.
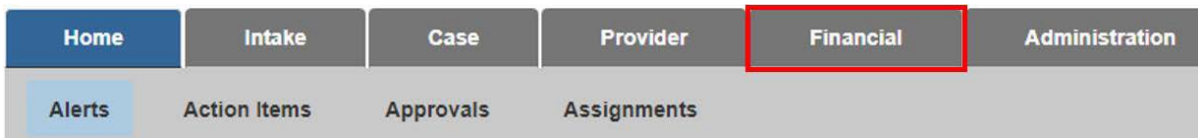
The sub-menu will change to display financial options.

2. Click the **Eligibility** tab.

The left navigation pane appears.

3. Click, **Adoption Subsidy** in the navigation pane.

The **Adoption Subsidy** screen appears, displaying the **Person Selection** grid.

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4. Click the **Person Search** button.

Note: For information regarding a Person Search, please see the following Knowledge Base Article: Using Search Functionality.

OR

5. Enter the **Person ID** for the child for which you are creating a subsidy.
6. Click the **Go** button.

Child details and the **Subsidy and Review History** appear.

Adding a Review

Annual Redetermination – Completed as the yearly requirement to re-evaluate the Child and Adoptive Parent Eligibility for the program.

Modification – Completed when the Adoptive Parent(s) or the Agency requests a change in the amount of the subsidy.

Notice of Suspension – Completed when the Agency is unable to verify Eligibility requirements due to lack of contact with the Adoptive Parent(s).

Suspension – Completed when the Adoptive Parent(s) has not responded to the Notice of Suspension. Accessed through an approved Notice of Suspension Review.

Notice of Termination – Completed when the Child and Adoptive Parent no longer meetings program eligibility.

Termination – Completed when the Child and/or Adoptive Parent(s) does not meet program eligibility and the Notice of Termination timeframe has lapsed. Accessed through an approved Notice of Termination. Once a subsidy is terminated it cannot be reactivated.

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1. Verify the child information for accuracy.
2. Enter the **Review Effective Date**.

Important: The **Review Effective Date** is used to determine if a payment will be created the following month and the federal, state, and local shares for the payment.

3. Select the type of review being created from the **Review Type** dropdown menu.
4. Click the **Add Review** button (not active until the **Review Effective Date** is entered and the **Review Type** has been selected).

Person Selection

| Person Search | ~ OR ~ | Person ID: | Go |

| Name / ID: | Age, DOB: | Case ID: |
| Duck, Dewey / 111111119 | Age 3, 05/17/2017 | |

Assigned Workers:
Clampet, Daisy Mae

Subsidy and Review History

	Subsidy Type	Agency Name	Provider Name / ID	Application Received Date	Status	Current Amount		
Adoption Assistance Effective 11/15/2020 - 05/31/2035								
view	Adoption Assistance	Any County Children Services	Duck, Donald & Duck, Daisy / 1234567	01/13/2020	Approved	$500.00	appeal	
Payee Information ˅								

Add Subsidy

Subsidy Type: Adoption Type:

[▾]   [▾]   Add Subsidy

Add Review

Review Effective Date: *   Review Type:

[📅]   [▾]   Add Review

The **Adoption Assistance Review** screen appears.

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Note: Views for this screen will vary depending on the Review Type selected and will be displayed in the page title.

> Adoption Assistance Annual Redetermination

Starting the Subsidy Review

1. Verify the **Review Effective Date**.
2. Enter the **Annual Assurance Form (JFS01451-B) Sent Date**.

Note: **Annual Assurance Form (JFS01451-B) Sent Date** will only show if the **Review Type** selected is **Annual Redetermination** or **Notice of Termination**.

3. Enter the **Form Received Date**.

Adoption Assistance Annual Redetermination	
Subsidy Review ID:	Review Effective Date: * 01/01/2020
Annual Assurance Form (JFS01451-B) Sent Date: *	Form Received Date:

Note: **Form Received Date** will only show if the **Review Type** selected is **Annual Redetermination** or **Modification**.

Note: If the **Review Type** is **Annual Redetermination**, **Notice of Termination** or **Termination**, **Eligibility Requirements** must be completed.

4. Click **the Eligibility Requirements** link.

Eligibility Requirements	
View / Update Eligibility Requirements.	
1. Provider meets Parental Requirements.	INCOMPLETE
2. Child meets maximum Age and School Requirements.	INCOMPLETE
3. Child has Special Needs Factors.	INCOMPLETE
Determine Eligibility	Eligible for Continued Subsidy: Not Determined

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The user is taken to the **Eligibility Requirements** screen.

Completing the Eligibility Requirements

Provider meets Parental Requirements:

1. Select **Yes** or **No** from the dropdown menu in response to the following question: **Is the parents(s) stills supporting the child?**
2. Select **Yes** or **No** from the dropdown menu in response to the following question: **Is the parent(s) still legally responsible for the child?**

Eligibility Requirements

1. Provider meets Parental Requirements.

Is the parent(s) still supporting the child?

Is the parent(s) still legally responsible for the child?

Child meets maximum Age and School Requirements:

The system will populate the following fields using the child's **Date of Birth** from the **Person Profile** and the **Review Effective Date**.

- **Is the child under 18 years of age?**
- **Child's age as of Review Effective Date**

1. **Has the child reached compulsory school age and is attending school full-time?** will default to **Not Required** if the child is under the age of 6.

   OR

2. If the child is age 6 or older, select **Yes** or **No** from the dropdown menu in response to the following question: **Has the child reached compulsory school age and is attending school full-time?**

Note: A current school is required to be recorded on the child's **Person Profile** if **Yes** is selected.

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2. Child meets maximum Age and School Requirements.

Is the child under 18 years of age?   **Yes**

Child's age as of Review Effective Date: 13 years 6 months

Has the child reached compulsory school age and is attending school full-time?

School Name	Beginning Grade	Start Date	End Date

School information does not exist for this child.

[Update School Information]

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3. If extending the subsidy past the child's 18th birth month, select **Yes** from the dropdown menu in response to the following question: **Is this review for an extension?**

Note: This will only display when the child is 17 ½ years of age or older.

Is this review for an extension?

Note: When **Yes** is selected for **Is this review for an extension**? the **Extension Criteria** section will appear.

4. Select the criteria which applies to the child.

Extension Criteria

In order for a subsidy to be extended past the end of the child's 18th birth month, the child must meet at least one of the following criteria.
Select all that apply. Please refer to 5101:2-49-04 Requirement for adoption assistance past age 18.

☐ SSI Eligible

☐ SSD Eligible

☐ State Vocational Rehabilitation Services

☐ Developmental Disability or Medical Condition as diagnosed by an approved Qualified Professional

☐ Special Education

5. Clinically Diagnosed Characteristics that are active as of the Review Effective Date will display. Verify the information is correct, if updates are necessary, use the **Update Characteristics** button to complete in the Characteristics tab of the person record.

Person Characteristics ^

Displaying only clinically diagnosed person characteristics.

Characteristics	Category	Begin Date	End Date
Other Medically Diagnosed Condition	Medical	05/18/2017	
Positive Toxicology Screen at Birth - Barbiturates	Prenatal/Birth	05/17/2017	
Positive Toxicology Screen at Birth - Opiates	Prenatal/Birth	05/17/2017	

Update Characteristics

6. Complete the **How verified** textbox.

How verified: (expand full screen)

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7. Select **Yes** or **No** from the dropdown menu in response to the following question: Has the child reported not being enlisted in the military?
8. Select **Yes** or **No** from the dropdown menu in response to the following question: Has the child reported not being married?

Has the child reported not being enlisted in the military?	▼
Has the child reported not being married?	▼

Child has Special Needs Factors:

1. Clinically Diagnosed Characteristics that are active as of the Review Effective Date will display. Verify the information is correct, if updates are necessary, use

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the **Update Characteristics** button to complete in the Characteristics tab of the person record.

2. Place a checkmark(s) in the checkbox(es) beside applicable special needs that apply to the child under the clinically **Diagnosed Special Needs Factors** and **Other Special Needs Factors**.

Note: The system will populate any **Clinically Diagnosed** or **Other Special Needs Factors** that were chosen in the prior review or in the initial.

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Clinically Diagnosed Special Needs Factors *(Check all that apply to the child):*

☐ Developmental disability

☐ Physical impairment limiting 1 or more major life activity

☐ Mental impairment limiting 1 or more major life activity

☐ Physiological impairment, cosmetic disfigurement, or anatomical loss affecting 1 or more body systems

☐ Mental or psychological impairment (such as intellectual disability, emotional mental illness, or a learning disability)

☐ Medical condition causing distress, pain, dysfunction or social problems requiring ongoing treatment

Other Special Needs Factors *(Check all that apply to the child):*

☐ Child or their biological family has a social or medical history establishing a substantial risk for developing a Clinically Diagnosed Special Needs Factor

☐ Part of a sibling group being adopted together or is placed in the same adoptive placement of a sibling previously adopted

☐ Over 12 months and is a member of a minority, racial, or ethnic group making it difficult to place the child for adoption

☐ 6 years old or older

☐ Remained in Permanent Custody for more than 1 year before an adoptive placement

☐ Been in the prospective adoptive parent's home for at least 6 months directly preceding the adoptive placement and would experience severe separation and loss if removed from the home

☐ Experienced a previous adoption disruption or 3 or more placements

3. Complete the How were Special Needs verified textbox.

4. Click **Save**.

How were Special Needs verified: (expand full screen)

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Apply   Save   Cancel

The user is taken back to the **Adoption Assistance Annual Redetermination** or **Adoption Assistance Notice of Termination** screen.

Determining Eligibility

Under the **Eligibility Requirements** section:

1. Click **Determine Eligibility**.

Note: If you have failed to complete any required information used in determining eligibility, validation messages will display at the top of the screen.

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Once the **Eligible for Continued Subsidy** is **YES** or **NO,** the screen will expand to display the **Actions** & **Subsidy Details** sections.

Completing Subsidy Review Actions

1. Select the **Action Type** from the dropdown menu.

Note: The **Action Type** is defaulted to the selected Review Type and not modifiable unless the Review Type is Annual Redetermination.

Note: When the Review Type is Annual Redetermination and Eligibility is **Yes**, the **Action Type** dropdown menu will display Maintain Subsidy**,** Modification, and Notice of Suspension for Assistance in Selecting the Action Types Adding a Review. Maintain Subsidy should be selected if there are no changes to the current Subsidy Amount and the agency is able to complete the annual redetermination.

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When the Action Type of Maintain Subsidy is selected:

2. Verify the **Subsidy Amount** is correct, if updates are necessary, select a different Action Type.

Actions	
Action Type: *	Maintain Subsidy

Subsidy Details	
Subsidy Amount:	$375.00

When the Action Type of Modification is selected:

1. Select the **Action Reason** from the dropdown menu.
2. Enter the **Requested Amount**.
3. Select **Yes** or **No** from the dropdown menu in response to the following question: Have the agency and adoptive parents agreed upon a new subsidy amount?

Note: The **Requested Amount** and **Has the agency and adoptive parents agreed upon a new subsidy amount?** will not display until an **Action Reason** has been selected.

Actions	
Action Type: *	Modification
Action Reason:	
Requested Amount:	$
Have the agency and adoptive parents agreed upon a new subsidy amount?	

When **Have the agency and adoptive parents agreed upon a new subsidy amount?** in the **Actions** section is **No**. The current **Subsidy Amount** displays in the **Subsidy Details** section.

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Subsidy Details	
Subsidy Amount:	$500.00

When Have the agency and adoptive parents agreed upon a new subsidy amount? in the Actions section is Yes.

1. Verify the **Monthly Maintenance Cost of Care**.

Note: The **Monthly Maintenance Cost of Care** will display the amount entered on the prior Subsidy Review.

2. Enter the **New Subsidy Amount**.

Note: Clicking the **Calculate Shares** button will display the Federal, State, and Local Shares for the New Subsidy Amount Entered. *This button will be available in build 4.10*.

3. Enter the **Amended Adoption Assistance Agreement Date**.

Subsidy Details

Subsidy Amount:	$500.00
Statewide Maximum:	$1,162.00
Monthly Maintenance Cost of Care Amount: ⓘ	$ 1058.00
The Monthly Maintenance Cost of Care Amount displayed is from the most recent approved AA Subsidy Review or the Initial AA Subsidy.	
New Subsidy Amount:	$
	Calculate Shares
Amended Adoption Assistance Agreement Date:	📅

When the Action Type of Notice of Suspension is selected:

1. Select the **Action Reason** from the dropdown menu.
2. Enter the **Notice of Suspension Mailed Date**.

Note: The **Notice of Suspension Mailed Date** can be entered later.

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When the Action Type of Notice of Termination is selected:

1. Select the **Action Reason** from the dropdown menu.
2. Enter the **Notice of Termination Mailed Date**.

Note: The **Notice of Termination Mailed Date** can be entered at a later date.

Suspending a Subsidy

In order to suspend a subsidy, navigate to the most recently approved review where the **Review Type** and/or **Action Type** is **Notice of Suspension**:

1. Click the **edit** link.

The **Adoption Assistance Notice of Suspension** screen appears.

2. Enter or verify the **Notice of Suspension Mailed Date**.
3. Click the **Suspend Subsidy** button.

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The **Adoption Assistance Suspension** screen appears.

4. Enter the **Review Effective Date**.

Important: The **Review Effective Date** cannot be prior to issued AA payments.

5. Select the Action Reason from the dropdown menu.
6. Enter narrative in the **Reason for Suspension** textbox.

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Last Revised: 12/22/2023

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Terminating a Subsidy

In order to terminate a subsidy, navigate to the most recently approved review where the **Review Type** and/or **Action Type is Notice of Termination**.

1. Click the **edit** link.

Reviews ∧

edit	Review Type: Notice of Termination	Action Type: Notice of Termination	Review Effective Date: 12/02/2020	Status: Approved	Subsidy Amount: $0.00	appeal

The **Adoption Assistance Notice of Termination** screen appears.

2. Enter or verify the **Notice of Termination Mailed Date**.
3. Click the **Terminate Subsidy** button.

Actions

Action Type: *	Notice of Termination ▾
Action Reason:	Adoptive Parent(s) Request ▾
Notice of Termination Mailed Date:	12/02/2020 📅

Terminate Subsidy

The **Adoption Assistance Termination** screen appears.

4. Enter the **Review Effective Date**.

Note: The **Review Effective Date** cannot be prior to issued AA payments.

5. Complete the **Eligibility Requirements** and determine eligibility. See

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Completing the Eligibility Requirements Screen

Adoption Assistance Termination

Subsidy Review ID:	Review Effective Date: *	Notice of Termination Mailed Date: 12/02/2020

Eligibility Requirements

View / Update Eligibility Requirements.

1. Provider meets Parental Requirements.	INCOMPLETE
2. Child meets maximum Age and School Requirements.	INCOMPLETE
3. Child has Special Needs Factors.	INCOMPLETE

Determine Eligibility

Eligible for Continued Subsidy: Not Determined

6. Select the **Action Reason** from the dropdown menu.
7. Enter narrative in the **Reason for Termination** textbox.
8. Enter any **Comments**.

Actions

Action Type: *   Termination

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Action Reason:

Reason for Termination: (expand full screen)

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Completing the Subsidy Review

When the **Subsidy Review** is complete, click the **Process for Approval** button. If you have failed to complete any required information for the AA Review, validation messages will display at the top of the **Adoption Assistance Annual Redetermination** screen with any incomplete fields.

1. Enter any **Comments**.
2. Click the **Process Approval** button.

Note: Required when the Subsidy Amount is greater than the Statewide Maximum.

Subsidy Details	
Subsidy Amount:	$375.00

Comments: (expand full screen)

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Process for Approval

The **Process Approval** screen appears.

Processing for Approval

1. If all requirements for the AA Review have been completed, the **Process Approval** screen appears.
2. Select from the **Action** dropdown menu.
3. Enter any **Comments**.
4. If you do not have approval access rights, select from the **Reviewers/Approvers** dropdown menu.
5. Click **Save**.

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The **Adoption Subsidy History** screen appears. Click the **Reviews** drawer, to view the newly created review.

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at sacwis_help_desk@childrenandyouth.ohio.gov .

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