# Creating PASSS Applications in Ohio SACWIS



# Knowledge Base Article

# Creating PASSS Applications in Ohio SACWIS

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# Creating PASSS Applications in Ohio SACWIS

## Overview

This knowledge base article discusses the **Post Adoption Special Services Subsidy (PASSS)** functionality and how to:

- Create and approve PASSS applications
- Issue payments
- Add appeals
- Create application reviews

## Navigating to the PASSS screen

From the Ohio SACWIS Home Page:

1. Click the **Financial** tab.
2. Click the Eligibility tab.
   a. The left navigation pane appears.
3. Click **PASSS** in the navigation pane.
   a. The **Program Details** screen appears displaying the **Person Selection** grid.
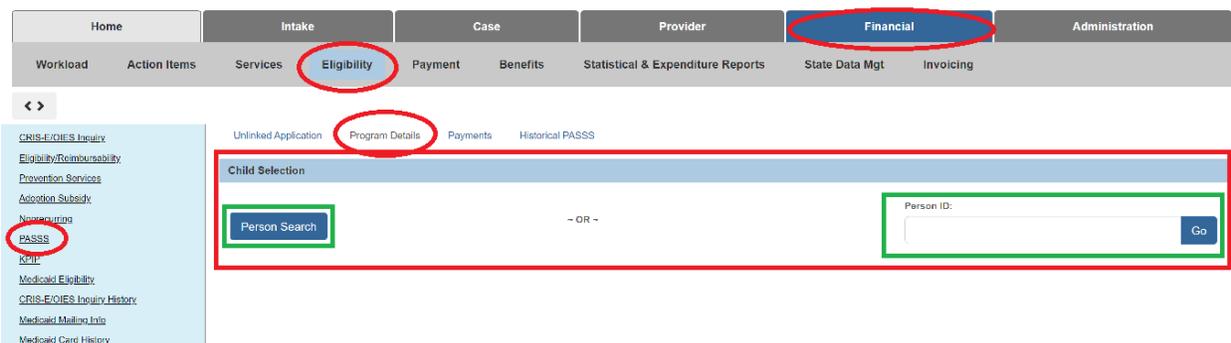
Note: If you are completing an application from the **Unlinked Child** screen, see [Creating an Application from the Unlinked Child Screen](#) below.

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 an application.

6. Click the **Go** button.



7. The Child Selection section populates with the child's demographic information as shown below.

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## Creating an Application from the Unlinked Child Screen

1. Use the search criteria to filter the desired child(ren).
2. The Results will display all unlinked applications matching the filter criteria above.
3. Select the **Add Application** hyperlink next to the desired child.



4. This will navigate you to the Person search page.
   a. For information regarding a **Person Search**, please see the following Knowledge Base Article: **Using Search Functionality.**
5. If the unlinked application is no longer needed, select the **withdraw** hyperlink to be navigated to the unlinked application withdrawal screen.

**Note:** From this screen, selecting the **Generate Report** button will give user a report of all unlinked applications based on the selected filter criteria.

## Withdrawing an Unlinked Application

1. The **withdraw** hyperlink will bring you to the Application Withdrawal screen
2. You will need to select a reason from the **Reason for Withdrawal** dropdown
3. Enter an explaination for the withdrawal.
4. Once saved, this record will no loger appear on the **Unlinked Application** screen.

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## Adding an Application from the Program Details screen

**Note:** This process will be used when the application was not submitted through the PASSS portal.

1. Use the search criteria to filter the desired child(ren).
2. The Results will display all existing applications matching the filter criteria above.
3. Select the **Add Application** button on the screen to begin the application.
4. Once selected, skip to Linking a Child, number 3.

## Linking a Child

1. Using the information from the portal, search for the child in Ohio SACWIS
   a. Click the **Person Search** button.

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

       OR

       b. Enter the **Person ID** for the child for which you are creating an application.

       c. Click the **Go** button.

2. If the desired person is not found, a new person can be created.
3. Once the desired child is selected, select the type of adoption.
   a. A Public Adoption will require that the adoption finalization date has been captured in Ohio SACWIS
   b. A Private Adoption will not require that the adoption finalization date has been caputred in Ohio SACWIS.
4. In the State Fiscal Year field select the State Fiscal Year (for which the PASSS application is being created) from the drop down list as shown below.

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**Important**: The State Fiscal Year field defaults to the current State Fiscal Year. The drop down field allows the user to select either the current, previous, or future State Fiscal Year depending on the system date.

Users can select the current or the previous State Fiscal Year until the system date exceeds September 30th of the current state fiscal year.

Users can select the future State Fiscal Year when the system date exceeds May 15th of the current state fiscal year.

**Note**: If entering an application for the future state fiscal year, the Approval Date must be after May 1st of the new state fiscal year. The system does not allow for future dating of these fields.

## Adding Application Details

1. Populate the Adoptive Parent(s) Name field
   a. The Adoptive Parent(s) Name field is automatically populated when the type of subsidy is Public, and the adoption finalization has been recorded in Ohio SACWIS.
   b. If the adoption type is Private, the Provider Search can be used to find or create a Provider.
2. The Results will display all existing application matching the filter criteria above.
3. Select the **Add Application** button on the screen to begin the application.
4. The PASSS Application screen appears.
5. Select **Continue**.

## Completing the PASSS Application

1. Populate the **Adoptive Parent(s) Name** field.
   a. The **Adoptive Parent(s) Name** field is automatically populated when the type of subsidy is Public, and the adoption finalization has been recorded in Ohio SACWIS.
   b. If the adoption type is Private, the Provider Search can be used to find or create a provider.
2. Enter the **Completed Application Received Date**.
   a. The **Completed Application Received Date** should be the date the completed application, including all required documentation, was received by the agency.
   b. If recording an application for the next fiscal year, the **Completed Application Received Date** cannot be prior to May 1st of the current fiscal year. A validation message will inform the user "Application Received Date must be on or after May 1st".

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## Completing the Family Data Section of The PASSS Application

**Important:** The **Adoption Finalization Date** will automatically be displayed on the application if it currently exists in Ohio SACWIS. In the case of a Private Adoption, an enterable date field will be displayed allowing the user to enter the **Adoption Finalization Date**.

1. Select **Yes** or **No** for the **Child Adopted by Relative** drop-down field.
2. Select **Yes** or **No** for the **Child Adopted by Stepparent** drop-down field.
   a. If **Yes** is indicated, the child will not be eligible for PASSS.
3. Complete the **Family Composition** field by entering either **One Adult Caretaker** or **Two Adult Caretakers** from the drop-down field.
4. Enter the family's **Annual Gross Income**
5. Enter the **Number of Children in Home** (Adopted, Biological, Other, Foster)
   a. For a PASSS Application to be saved, at least one adopted child must reside in the home.
   b. The **Family Size (including Adopted Children)** field will populate automatically based upon the number of adult caretakers selected plus the number of children in the home. Foster children indicated on the application are omitted from this calculation.
6. Populate the **Family Income Exceeds 200% of the Federal Poverty Guidelines** by clicking the **Apply** or **Save** button.
   a. The **Family Income Exceeds 200% of the Federal Poverty Guidelines** will be system calculated based upon the family's size and annual gross income entered as compared to 200% of the Federal Poverty Guidelines in effect for the application period.
7. Determine the **Family's PASSS Co-Pay**
   a. The **Family's PASSS Co-pay** will default to 5%. This amount can be changed based upon whether the family's income is above or below 200% of the Federal Poverty Guidelines in effect for the application period. If the family's Annual Gross Income is below 200% of the Federal Poverty Guidelines in effect for the application period, all or part of the adoptive family's co-pay can be waived at the county agency's discretion. Any percentage that is waived will result in an increased reimbursement from the state up to 100% of each invoiced amount up to the annual subsidy maximum(s) for each child. For these families, the co-pay entered cannot exceed 5%.

      For families with an Annual Gross Income amount more than 200% of the Federal Poverty Guidelines in effect for the application period, the adoptive family's co-pay will default to 5%, but can be adjusted to any percentage amount from 0% (co-pay waived at the county agency's discretion) to 100% (no state reimbursement). A Family's PASSS Co-Pay

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percentage entered below 5% will result in a local share payment percentage for the county agency, as the state's reimbursement will not exceed 95% for this population. A **Family's PASSS Co-Pay** above 5% will result in a proportionate decreased reimbursement percentage to the county agency (i.e., a family co-pay percentage of 10% will result in a 90% state reimbursement to the county agency).

8. Select **Yes** or **No** for the **Child is Currently Covered by Medicaid** field.
9. Select **Yes** or **No** for the **Child is Currently Covered by Private Health Insurance** field.
10. Click **Apply** or **Save** to save the information recorded in the Family Data Section.

## Completing the Special Need Criteria Section of the PASSS Application

**Important:** At least on Child Characteristic that meets the Special Needs Criteria for PASSS must be listed on the application for the child to be eligible for PASSS funding.

**Note:** The system will automatically populate PASSS-approved Child Characteristics on the Special Needs Criteria grid from the child's Documented Person Characteristics list (located on the Characteristics tab of the child's Person Profile), where the Begin Date of the characteristic is prior to or equal to the PASSS Application Received Date and the End Date of the characteristic is either blank or after the application date.

**Note:** The **Characteristic(s)** brought forward from the child's **Person Profile** must indicate that they have been **Clinically Diagnosed** and must contain relevant diagnosis information including the name of the individual whom the child was **Diagnosed By** and the **Date of Diagnosis**.

**Note:** If no PASSS-approved Child Characteristic(s) are brought forward into the application from the child's Person Profile, the user may add them by completing the following steps:

1. Click the Add Child Characteristic button.
   a. The user will be taken to the **Documented Person Characteristics** screen in the child's **Person Profile** to add the appropriate **Characteristic(s)** record.
2. Select **Characteristic Type** from the drop-down field.
3. Click the **Add Characteristic** button.
4. Highlight a characteristic and move it from the **Available Characteristics** to the **Selected Characteristics** box by clicking **Add** as necessary.
   a. **Note:** The user can highlight multiple characteristics prior to clicking **Add** to move multiple characteristics at one time.
5. Complete the **Diagnosed By**, **Diagnosis Date** and **End Date** (if applicable) fields.

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    a. **Reminder:** For the characteristic record to pull into the PASSS application, the **Clinically Diagnosed** radio button must be selected an the **Diagnosed By** field and the **Diagnosis Date** must be entered.

6. Enter additional information narrative as necessary.
7. Click the **Save** button.
8. The user will be taken back to the PASSS application screen, and the appropriate characteristics will have populated within the application.

## Completing the Resources Section of the PASSS Application

**Important:** If a IV-E Adoption Assistance Subsidy or State Adoption Maintenance Subsidy (SAMS) exists for the child where the effective date of the subsidy is prior to or equal to the PASSS Application Date and the termination date of the subsidy is greater than the PASSS Application Date, the applicable subsidy information including the Resource or subsidy name, current monthly subsidy Amount (derived from the most recent subsidy review record) and the effective Date of the subsidy will be displayed in the PASSS Resource History grid.

Note: If the SAMS subsidy amount exceeds the current SAMS Ceiling that is in place, the SAMS Ceiling Amount will be displayed as the total monthly Subsidy Amount and the remainder of the amount will be displayed as a Local Subsidy Amount.

Additional Resource Types can be added or removed by the user.

1. Select the **Resource Type** from the drop-down field.
2. Enter the effective **Date.**
3. Enter the **Amount**
4. Enter a **Description**
5. Click the **Add** button.

**Note:** A user will have the ability to add an IV-E Adoption Assistance Subsidy resource record if one has not been system derived. This will be necessary in the case of ICAMA children. The system-derived AA and SAMS record cannot be removed by the user.

6. Select Next Topic to move to the next section of the PASSS application.

## Uploading Documents for a PASSS Application

1. Select the **Upload Document** button.
    a. The Document Category will prepopulate and cannot be changed.
2. Select **Document Type** from drop-down field.
3. Enter the **Document Name**
4. Select the **Document Date**
5. Select **Browse**
    a. The user's File Explorer will open.
    b. Navigate to the file you would like to upload.

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6. Enter **Comments** as necessary.
7. Click **Save**
8. Select **Next Topic** to move to the next section of the PASSS application.

## Completing the PASSS Services Section of the PASSS Application

**Note: Family Income Exceeds 200% Federal Poverty Guidelines** will be displayed along with the family's cop-pay to be displayed at the top of the application screen.

1. Enter the amount requested by the family for each requested service in the **Requested Cost** column.
2. Enter the **Amount Approved by the Executive Director or designee** in the Approved Cost column.
   a. The **State Obligation** will be calculated as 95% of the **Approved Cost** column.
   b. The **Adoptive Parent Obligation** and **Local Share** will be system calculated based upon the **Family's PASSS Co-Pay** to be applied.

**Important:** Respite/Medical and Respite Mental Health services cannot exceed more than $4,800 in any given fiscal year.

**Important:** The total **Approved Cost** amount (the sum of ALL requested services for the child during the current state fiscal year) cannot exceed the PASSS Ceiling Amount for the current state fiscal year.

## Completing the Extraordinary Circumstances for Additional Funding Section

1. Enter the amount of **Additional Funding** requested.
   a. The **Additional Funding** cannot exceed $5,000 for the current fiscal year.
2. Select the checkbox to indicate the applicable reason for the request.
3. Document the **Additional Funding Reason** in the narrative box.

**Note:** State approval for the Extraordinary Circumstances request is no longer needed and can be approved at the local agency.

## Completing the Approval Section

1. Select the status in the drop-down field.
2. Document **Additional Comments** as necessary
3. Click **Save**

**Note:** If there are errors or disqualifications within the application, the user will receive a validation message notifying them of corrections and/or updates that are required to be completed prior to completing the application status.

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## Generating Payments



1. Navigate to the **Payment** tab. This can be done either by selecting the tab and entering the Child's Person ID, or by selecting the **Create Payment** button on the Program Details page with the desired child in focus.
2. Select the service that the payment is being issued against and then select the **Generate Payment** button.
3. Once inside the **Payment** screen, select the provider who is being paid. If the Adoptive Parents are being reimbursed, select the "Pay Adoptive Parent(s)" button to populate the Adoptive parents as the Provider to be paid.
4. Select the **Type of Provider** that is receiving a payment. Choice are Individual, Limited Liability Company (LLC) or corporation.
   a. If Corporation, no further information will be needed from the provider.
   b. If Provider is an Individual, Use the '**Select Tax Recipient'** dropdown to choose the specific individual receiving a payment.
      i. System will determine if a Social Security Number (SSN) exists for selected person. If the SSN missing or incorrect, use the '**Update SSN Information'** hyperlink to update the SSN. Link will navigate user to the Basic Tab of the selected Person's Person record.
      ii. System will determine if an active **Tax Return Address** exists for selected person. If the **Tax Return Address** is missing or incorrect, use the '**Update Tax Return Address**' hyperlink to update the **Tax Return Address**. Link will navigate user to the Address Tab of the selected Person's Person record.
   c. If Provider is an LLC:
      i. System will determine if TIN exists for selected Provider. If TIN is missing or incorrect, use the '**Update TIN Information**' hyperlink to

update the TIN. Link will navigate user to the Basic Tab of the selected Provider's Provider record.

ii. System will determine if an active **Tax Return Address** exists for selected person. If **Tax Return Address** is missing or incorrect, use the '**Update Tax Return Address**' hyperlink to update the **Tax Return Address**. Link will navigate user to the Address Tab of the selected Provider's provider record.



d. Enter the **Invoice Number** and **Invoice Date** if available.
e. Enter the **Payment Begin** and **End** date. This will be the dates that the services were rendered.

*Note: **Payment Begin** and **End** dates must be within the effective and end dates for the associated PASSS application.

*Note: **Payment Begin** and **End** dates must occur within the same month, and dates cannot cross multiple months.

f. Enter any comments necessary. These comments will be recorded on the specific state payment record.

g. In '**Invoice Amount**' enter the full amount of the invoice being paid. The system will determine any co-pay or overage amounts.

   i. If The family has a co-pay, the system will attribute the appropriate amount to the **Adoptive Family Share** row.

   ii. If the Invoice Amount exceeds the balance, the system will attribute any overage to the **Adoptive Family Share** row.

h. Select the **Calculate** button. System will create a state payment record for the **Payment Amount** above.

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i. Select the **Generate Payments** button, which should bring up the validation that Payment has been created. User is returned to the **Payments** tab. From this screen, **Payment History** drawer can be opened to see the pending payment.

   i. A **delete** icon will exist until the payment is sent to OAKS. This occurs overnight on the day the payment is created.



Please contact the Children Services Operational Support Help Desk should you require additional assistance.