Creating a Nonrecurring Adoption Subsidy and Processing Payments

Knowledge Base Article

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Job and Family Services

Overview

This Knowledge Base Article discusses the **Nonrecurring Adoption Subsidy** functionality. The article explains the **Eligibility Determination Process** and the **Payment Processing** function for a **Nonrecurring Adoption Subsidy**.

Reimbursement of Nonrecurring Adoption Expenses

Any **Application for Reimbursement of Nonrecurring Adoption Expenses (JFS 01421)** will be processed in Ohio SACWIS.

Important: All Nonrecurring Adoption Expenses claimed by the Public Children Services Agency (PCSA) **must be processed in Ohio SACWIS for the PCSA to receive reimbursement**.

Nonrecurring Adoption Subsidy Eligibility Determination

To create a new Nonrecurring Adoption Subsidy, complete the following steps in the Ohio SACWIS system.

1. Click the **Financial** tab.
2. Click the **Eligibility** tab.

3. Click the **Nonrecurring** link in the **Navigation** menu.

4. Click the **Person Search** button or if you know the **Person ID** put the number in and click **Go**.

The **Nonrecurring Subsidy History** screen displays.

5. Select whether the subsidy is **Public, Private or Independent** from the drop-down menu.

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6. Click the **Add Subsidy** button.

Note: An AA or SAMS Subsidy may already exist for the child within the Nonrecurring Subsidy History section.

The **Select Provider** screen appears.

1. Click the **Provider Search** button or if you know the **Provider ID** insert number and click **Go**.

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Provider Information

AA Provider Name / ID:

To link a different Provider use Provider Search or enter a Provider ID.

| Provider Search | ~ OR ~ | Provider ID: | Go |

2. The **Provider** displays.
3. Click **Continue**.

Provider Information

AA Provider Name / ID:

To link a different Provider use Provider Search or enter a Provider ID.

| Provider Search | ~ OR ~ | Provider ID: | Go |

Provider Name / ID:	Payee Name / ID:	Payee Address:	Payment Method:
Test, Provider / 123456	Test, Payee / 12345	Test Address Ohio 12345	Check

Continue   Cancel

The **Non-Recurring Subsidy - Application** screen appears as shown below.

Note: If an AA or SAMS Subsidy already exists, the following dates will pre-populate into the Nonrecurring Subsidy from that existing record:

- **Social / Med Date**
- **Home Study Date**
- **Adoption Finalized Date** or **Adoption Disruption Date**

If this is a new AA or SAMS Subsidy then you will need to fill out all required fields.

4. Enter the **JFS 01421 Received Date**. This date cannot be prior to July 1, 2016. (Required)

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Application   Payments

Nonrecurring Subsidy

Nonrecurring Application Received Date (JFS01421): *

Adoption Disruption Date:

Child's Social & Medical History Form (JFS01616) Provided Date:

Adoption Finalized Date:

Home Study Date:

5. In the **Eligibility Requirement** section, click the **Eligibility Requirements** link.

Adoptive Placement Date:

Eligibility Requirements

View / Update Eligibility Requirements.

1. Child is Free for Adoption.	INCOMPLETE
2. Biological Parent not in the Adoptive Home.	INCOMPLETE
3. Child has Special Needs Factors.	INCOMPLETE
4. Efforts have been made to place without a subsidy.	INCOMPLETE

Determine Eligibility   Eligible: Not Determined

The **Eligibility Requirements** screen appears. The steps for the next screen will provide the elements needed for the person's eligibility determination.

The **Requirements 1 to 4** grid appears

Completing Requirements 1 to 4

1. **Yes** or **No** will pre-populate for if the **Child is free for adoption** and **their Legal Status** will also pre-populate for **requirement 1**.
2. Select **Yes** or **No** from the drop-down for if Biological Parents is not in the Adoptive Home for **requirement 2**.
3. For **requirement 3**, a child must have at least one **Clinically Diagnosed Special Needs Factor** supported by one or more **Person Characteristics** OR at least one **Other Special Needs Factor**. Ensure all clinically diagnosed person characteristics are added by clicking the **Update Characteristics** button.
4. For **requirement 3**, ensure to **check mark** all applicable boxes for **Clinically Diagnosed Special Needs Factors** and **Other Special Needs Factors**.
5. In order to save the data on this screen you must fill out the **text box** for **How were Special Needs Verified**?
6. For **requirement 4**, Select **Yes** or **No** from the drop down menu and fill out **text box**.
7. Click **Save** at the bottom of the screen.

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1. Child is free for adoption.

Is the Child in the Permanent Custody / Permanent Surrender of the Agency, and either parents' rights have been terminated or they are deceased?   **No**

Legal Status: Temporary Custody 1st Extension

2. Biological Parent is not in the Adoptive Home.

Has either biological parent been in the adoptive home during the past 90 calendar days?   No ▼

3. Child has Special Needs Factors.

In order to be eligible, a child must have at least one Clinically Diagnosed Special Needs Factor supported by one or more Person Characteristic(s) OR at least one Other Special Needs Factor.

Person Characteristics ⌃

Displaying only clinically diagnosed person characteristics.

Characteristics	Category	Begin Date	End Date
Allergies - Drug	Medical	05/27/2022	
Allergies - Environmental	Medical	05/27/2022	

Update Characteristics

View child's Medical History

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

How were Special Needs verified: (expand full screen)

Test

✔ ABC

3996

4. Efforts have been made to place without a subsidy.

Has the agency made a reasonable but unsuccessful effort to place the child with an appropriate adoptive parent(s) without adoption assistance, as supported by facts specified in the child's case record as described in paragraph (A)(3) of rule 5101:2-49-03 of the Administrative Code?   Yes ▼

Please explain: (expand full screen)

Test

✔ ABC

3996

Apply   Save   Cancel

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The **Non-Recurring Subsidy Application** screen appears.

Note: Per rule **5101:2-49-21 Reimbursement of Nonrecurring Adoption Expenses for a Child with Special Needs, section (D)**, "the JFS 01421 'Application for Reimbursement of Nonrecurring Adoption Expenses' shall be submitted to the appropriate PCSA and approved prior to the adoption finalization or disruption prior to the adoption finalization, if applicable."

1. Review the **Eligibility Requirements** section. All fields in this section must display **Yes** in order to approve the Subsidy.
2. Click the **Determine Eligibility** button

Application	Payments

Nonrecurring Subsidy

Nonrecurring Application Received Date (JFS01421): *
08/16/2023

Adoption Disruption Date:

Child's Social & Medical History Form (JFS01616) Provided Date:

Adoption Finalized Date:

Home Study Date:

Adoptive Placement Date:

Eligibility Requirements

View / Update Eligibility Requirements.

1. Child is Free for Adoption.	YES
2. Biological Parent not in the Adoptive Home.	YES
3. Child has Special Needs Factors.	YES
4. Efforts have been made to place without a subsidy.	YES

Determine Eligibility

Eligible: Not Determined

The **Subsidy Determination** will appear as **Yes** or **No.**

3. In the **Subsidy Details** section, enter the **JFS 01438 Agreement Date** OR the **Denial Date**, if applicable.

   - An **Agreement Date** and **Denial Date** cannot exist simultaneously. Either one or the other must be entered for the Application to save successfully.

   - Per rule **5101:2-49-21 Reimbursement of Nonrecurring Adoption Expenses for a Child with Special Needs, section (E)**, the JFS 01438 'Agreement for Payment or Reimbursement for Nonrecurring Expenses Incurred in the Adoption of a Child with Special Needs' must be signed by the PCSA and adoptive parent(s) "prior to the adoption finalization or disruption prior to adoption finalization, if applicable."

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4. If you entered a **Denial Date**, you must select a reason for the denial in the **Reasons for Denial** section.

5. If you selected **Other** as the reason for the denial you must enter a comment in the **Comments** text box.

6. Click, **Save**.

Determine Eligibility

Eligible: NO

Comments: (expand full screen)

✔ ABC
4000

Subsidy Details

Denial Date:

Reason for Denial

☐ Applied After Finalization   ☐ Bio-Parents in the House
☐ Expense Limit   ☐ International
☐ No Special Needs   ☐ Over 18
☐ Other

Apply   Save   Cancel

7. If your application is **Eligible**, you must enter the **Agreement Date (JFS 01438)**.
8. Click **Save**.

Determine Eligibility

Eligible: YES

Comments: (expand full screen)

✔ ABC
4000

Subsidy Details

Agreement Date (JFS 01438):   Nonrecurring Approval Date (JFS 01421):

Process for Approval

Apply   Save   Cancel

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The **Adoption Subsidy Program** screen appears displaying the **Subsidy History** grid showing the Status of the application as **Pending**, **Approved** or **Denied**.

The **Non-Recurring** Subsidy record will save within the **Subsidy History** in the same manner as an AA or SAMS record, as shown by the first **Non-Recurring** record in the example below.

- **Appeals** for Nonrecurring Subsidies will function in the same manner as an AA or SAMS record.

- A **Non-Recurring** Subsidy record can be marked **Created in Error** as long as payments are not associated with the record (shown by the second **Non-Recurring** record in the example below).

- The Nonrecurring Subsidy's **End Date** will be two years from either the **Adoption Finalized Date** or the **Adoption Disruption Date**. The worker will receive a notification 60 days prior to the End Date if a balance remains on the Subsidy.

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Nonrecurring Adoption Subsidy Payment Processing

Payments for a **Nonrecurring Adoption Subsidy** are created within the Subsidy. After the Application portion of the Subsidy is completed and approved, the PCSA may begin generating payments that can be made either to the adoptive parent(s) or to the service provider(s).

In order to process payments, complete the following steps:

1. Navigate to the **Nonrecurring** screen:

    a. Click the **Financial** tab.

    b. Click the **Eligibility** tab.

    c. Click the **Nonrecurring** link in the **Navigation** menu.

The **Adoption Subsidy Program** screen appears displaying the **Subsidy History** grid.

2. Click the **View** link next to the **Non-Recurring** Subsidy in which you want to process payments.

The **Non-Recurring Subsidy Application** screen appears.

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Application	Payments

Nonrecurring Subsidy

Nonrecurring Application Received Date (JFS01421): *
08/16/2023

Adoption Disruption Date:

Child's Social & Medical History Form (JFS01616) Provided Date:
08/16/2023

Adoption Finalized Date:

Home Study Date:
08/16/2023

3. Click the **Payments** tab.

The **Payments** screen appears.

4. Click the **Generate Payment** button.

Application	Payments

Payments

Payee Name / ID	Claim Dates	Service Type	Paid Amount	Reimbursed Amount
No Payments Exist				

Subsidy Limit:
$1,000.00

Total Paid Amount:
$0.00

Balance:
$1,000.00

Generate Payment

The **Non-Recurring Payment Information** screen appears.

5. Perform one of the following actions to populate provider or parent information:
    - Click the **Provider Search** button to search for a service provider, OR
    - Click the **Pay Adoptive Parent(s)** button to populate the parent(s) information.
6. Enter an **Invoice Number** and **Invoice Date**, **Vendor Number** and/or **Purchase Order Number**, if applicable.

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7. In the **Service Information** section:

    a. Select the **Service Type**.

    b. Enter the **Claim Begin Date** and the **Claim End Date**.

    c. Enter comments in the **User Comments** text box, if desired.

    d. Enter the **Requested Amount** for the payment. This is currently the amount that will be paid up to a maximum of $1,000.00 per child.

8. Click the **Create Payment** button.

The **Non-Recurring Payment Information** screen displays the **Payments Created** grid at the bottom of the screen.

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Subsidy Limit:
$1,000.00

Total Paid Amount:
$1,000.00

Balance:
$0.00

Requested Amount

$

Create Payment

Payments Created

Payee Name / ID	Person Name / ID	Service Type	Claim Dates	Requested Amount	Paid Amount	
Test, Payee / 123456	Test / 456789	Adoption Fees	08/16/2023 - 08/16/2023	$1,000.00	$1,000.00	🗑

Save and Add to Roster   Cancel

9. Review the payment(s) in the **Payments Created** grid.

   - A **Delete** link displays for a payment that has not yet been saved.

   - In this example, the **Balance** for the Subsidy is now $0 due to the creation of a $1000.00 payment.

   - Multiple payments can be created if needed.

10. After creating the payment(s), you can either:

    - Click the **Cancel** button to cancel without saving the payment, or

    - Click the **Save and Add to Roster** button to save the payment with the instant creation of a new roster.

11. If you clicked the **Save and Add to Roster** button you will be sent to **the Add to Roster** screen.

12. **Select** the appropriate answer from the drop-down menu.

13. Click **Save.**

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Add to Roster

Roster Status: *

Approved/Not Disbursed

Worker:

Test, Worker

Roster Name: *

0323 Nonrecurring

Assigned Worker:
Test, Worker

Save   Cancel

- Once the PCSA receives reimbursement for the payment, this amount will display under the **Reimbursed Amount** column of the summary (shown in green below).

Payments

Payee Name / ID	Claim Dates	Service Type	Paid Amount	Reimbursed Amount
Test, Payee / 123456	08/16/2023 - 08/16/2023	Adoption Fees	$1,000.00	$0.00

Subsidy Limit:
$1,000.00

Total Paid Amount:
$1,000.00

Balance:
$0.00

Generate Payment

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

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