Processing Applications for the Ohio Adoption Grant Program (OAGP)

Ohio | **Department of Job and Family Services**

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Knowledge Base Article

Processing Applications for the Ohio Adoption Grant Program (OAGP)

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Last Revised: 04/08/2024

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Overview

This article describes how to work within the Ohio Adoption Grant Program on the Salesforce platform to process OAGP applications.

Quick Tips

1. If you hover over icons you are unfamiliar with in the Salesforce platform, a prompt will appear indicating what action you can take if clicked.

2. An informational icon (🛈) will appear by several fields in the application. When you hover over an informational icon, additional text will appear which provides additional details on what values are needed to satisfy this question.
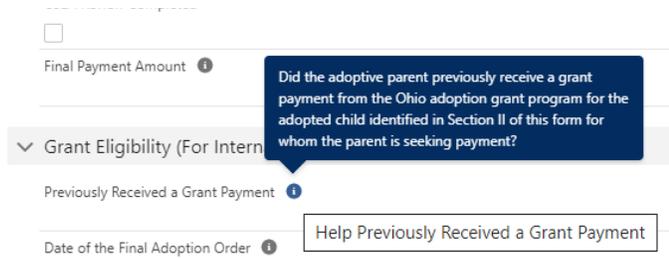
Gaining Access to Ohio Adoption Grant

1. Users will log into the Salesforce platform using their OH|ID and password after being granted access into **Ohio Adoption Grant**.

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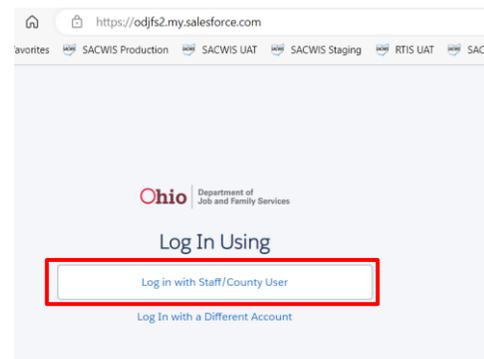
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2. If you work within multiple applications on the Salesforce platform, you may need to switch between them using the 9-dot square App Launcher in the upper left-hand corner of the screen. If you click this area, it will display a list of all applications you have access to. Choose **Ohio Adoption Grant** to work within this app. You may also use the search feature to find the **Ohio Adoption Grant** app.

Workload View

1. Depending on whether your security permissions are as a Reviewer or a Supervisor, you will see the following sections of the application on your Home screen:

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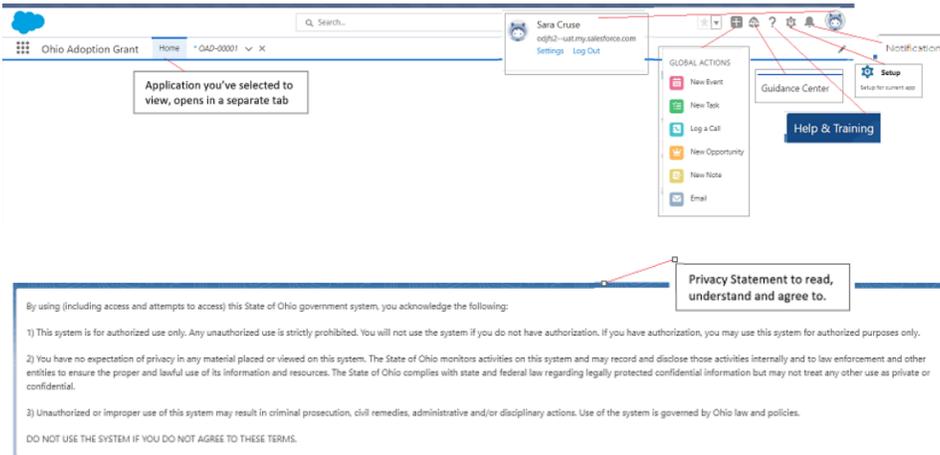
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Supervisors will have this view at the top of their screen:

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Commented [BK1]: Update images

Claiming an Application

1. From the **OAG Reviewer Queue**, select the application you intend to review.
2. After opening the application in the upper right corner of the screen select Change Owner.

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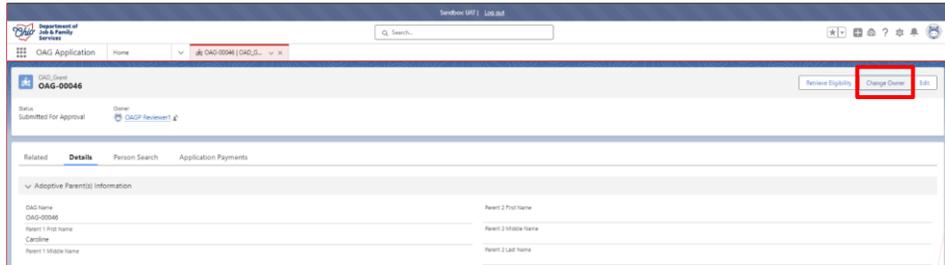
3. The **CHANGE OWNER** search box will appear. Type the name of the person you wish to assign the application to for processing, Select the person from the provided option. Click **SUBMIT**.
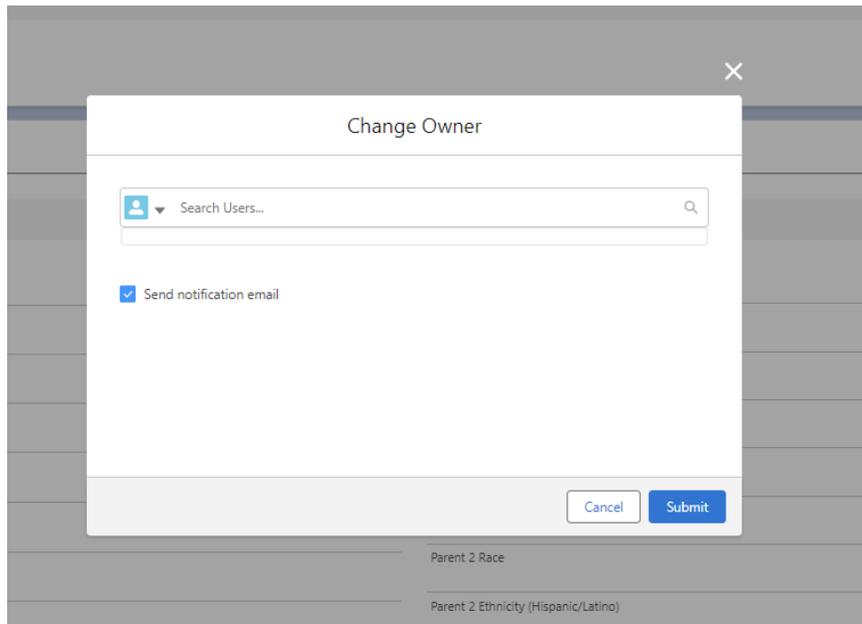
Change Owner

✕

Search Users...

☑ Send notification email

Cancel   Submit

Parent 2 Race

Parent 2 Ethnicity (Hispanic/Latino)

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4. If you assigned the record to yourself, you would now see it in the **My Applications** section of your home screen after you refresh the section.

Reviewing an Application – Details Tab

Click on the hyperlink for an **OAG Name** to view the record. The **Application** will display in a new tab.

Note: To populate as much information as possible in the application, completing the Person Search tab as detailed here and then selecting the **Retrieve Eligibility** button may be useful to do at this point.

The record defaults to the **Details** tab and is divided into the following sections:

Adoptive Parent(s) Information

This section provides information about **Parent Name(s), Parent Email(s), Parent Phone(s), Parent DOB(s), Parent Gender(s), Parent Race(s), Parent Ethnicity, Parent SSN(s)** and **Parent Person ID.** This section should be fully completed by the applicant(s) except for Parent Person ID, which will populate from Ohio SACWIS.

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Adoptive Parent(s) Information

OAG Name	Parent 2 First Name
OAG-00127	Test
Parent 1 First Name	Parent 2 Middle Name
Susie	
Parent 1 Middle Name	Parent 2 Last Name
	Adult
Parent 1 Last Name	Parent 2 Email
Sacwis	
Parent 1 Email	Parent 2 Phone
testing@testemail.com	
Parent 1 Phone	Parent 2 DOB
(123) 456-7890	3/5/2009
Parent 1 DOB	Parent 2 Gender
3/5/2008	Male
Parent 1 Gender	Parent 2 Race
Female	White
Parent 1 Race	Parent 2 Ethnicity (Hispanic/Latino)
White	No
Parent 1 Ethnicity (Hispanic/Latino)	Parent 2 SSN
No	111111111
Parent 1 SSN	Parent2 Person ID
000000000	
Parent1 Person ID	

Address

Listing of the **Address**, **City, County, State and Zip Code**, as entered by the applicant(s). This should match the address of the adoptive parent who is designated as the payee and should match with the photo ID provided. If not, additional information may be needed to prove residency.

Address

Address	Address Line 2
100 Main Street	
City	County
Anywhere	Adams County
State	Zip Code
Ohio	44000

Adoptive Child Information

This section includes values for **Child Name, DOB, Gender, Person ID, Ethnicity, Race, Date Adoption Finalized, Child SSN and Type of Adoption**, as entered in the portal by the applicant(s) – excluding Child Person ID, which comes from Ohio SACWIS.

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∨ Adoptive Child Information

Child First Name	Child Last Name
Liam	AdoptiveChild
Child Middle Name	Child DOB
Logan	1/1/2012
Child Gender	Child Person ID
Male	
Child Race	Child Ethnicity (Hispanic/Latino)
Black/African American;White	Yes
Child SSN	Date Adoption Finalized
444455666	1/2/2024
Type of Adoption	
Public	

Application Requirements

The **Applicant Requirements** section verifies what adoption finalization paperwork is attached to the application in the **All Grant Requests**, whether **A Completed W-9 Form** was attached, whether or not this was an **Adoption by Foster Caregiver**, a **Special Needs Adoption**, if the family checked the **Acknowledgment** of their Application and the **Acknowledgement Date**. All fields should have been filled out by the applicant(s).

∨ Application Requirements

All Grant Requests	A Completed W-9 Form
Final adoption order	Yes
Adoption by Foster Caregiver ⓘ	Special Needs Adoption ⓘ
Yes	Yes
Acknowledgement ⓘ	Acknowledgement Date
✔	3/23/2023

Information

Here, the applicant indicated which Adoptive Parent will be the payee of the grant, if approved.

∨ Information

Adoptive Parent Who Will be Payee ⓘ	Payee SSN

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Application Status

In this section, you may view and/or edit the following information:

Value	Definition/Information Included
Amount Approved	Final amount approved for this grant application.
Submitted Date	Date the grant application was last submitted.
Status	Can include *Submitted for Approval, Sent to OAKS, Payment Issued, Final Review Complete, Rejected, Recommended for Action, Approved, Denied, 2nd Review Denied, Stop Payment Requested*
Approved Date	Date the grant application was approved via approval process.
Status Last Updated	Date of the last status change.
Approved By	Name of the user who approved the application via approval process.
Denied By	User who denied the application.
Denial Comments	As entered by user who denied the application
Denial Date	Date denial was determined.
Current User Denied the Application?	Is current user same as the user who last denied the application?
Reviewer Name	Name of the reviewer who last approved/rejected application.
Is Denial Submission Acceptable	When Denied, applicants can only Submit the Application for Second Review within 31 days. If this is checked, they can submit for review. If not checked, they cannot.
Supervisor Name	Name of the Supervisor who last approved/rejected application.
Final Payment Amount	Amount Approved minus amount Diverted by CSEA.
Amount Diverted by CSEA	Dollar amount being claimed by CSEA, to be deducted from grant.
Stop Payment Reason	Reason why request to Stop Payment was made
Stop Payment Narrative	User entered comments about the Stop Payment

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Payment Information

Payment Information will include the following values. The informational icons detail the following:

Voucher ID Related – Holds the voucher ID from SACWIS

Warrant Status – Payment Status from SACWIS (ETF Failed, Issued, OAKS ETF Issued)

Payment Integration Error Message – This will hold the error message from Integration if there is an error.

Grant Eligibility (For Internal Use)

In this section, you may view and/or edit the following information:

Value	Definition/Information Included
Date of the Final Adoption Order	Provide the date of the final adoption order, interlocutory order of adoption, or recognition of the adoption by this state under section 3107.18 of the Revised Code for the adopted child for whom the grant payment is sought.

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Adoption Order Within One Year	Is the final adoption order, interlocutory order of adoption, or recognition of the adoption by this state under section 3107.18 of the Revised Code for the adopted child within one year from the date of this application?
Adoption Finalized After Jan 1 2023	Was the adoption finalized on or after January 1, 2023?
Step-Parent Adoption	Was this a step-parent adoption? If yes, this would be an automatic denial of the application.
Date of Application	Date submitted by applicant.
Completed W9 Form	Options of *Yes / No*
Ohio SACWIS Finalized Date	Date carried into the system by Ohio SACWIS.
Diagnosed with Special Needs	Options of *Yes / No*
Parent was Certified Foster Caregiver	Options of *Yes / No*
Adoptive Parent Resides in Ohio	Options of *Yes / No*
Review Completed	Check box that can be enabled/disabled.

∨ Grant Eligibility (For Internal Use)

Date of the Final Adoption Order 1/2/2024	Adoption Order Within One Year Yes
Adoption Finalized After Jan 1 2023	Step-Parent Adoption No
Date of Application 1/17/2024	Completed W9 Form Yes
Ohio SACWIS Finalized Date	Diagnosed with Special Needs Yes
	Parent was Certified Foster Caregiver Yes
	Adoptive Parent reside in Ohio Yes
	Review Completed ☐

Reviewing an Application – Related Tab

The **Related** tab will display the following information:

OAGP CSEA Review Line Items

Will contain pertinent information from CSEA reviews.

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Files

Approval History

This section displays the Step Name, the Date, any Comments and the Status of that step. The Approve and Reject buttons are also available in this section to send the application for Approval to a Supervisor or to Reject it. When the down arrow is clicked, additional actions of Reassign and Recall are available. For each action, a Comment box will appear to add text, and then a confirmation button will complete the action, or Cancel will undo the action you attempted.

OAG History

This section displays the **Date, Field, User, Original Value** and **New Value** of each action taken on the grant application.

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Reviewing an Application – Person Search

This section will be used to interface with Ohio SACWIS and find the Person ID associated with the individuals in the application using the information they entered.

1. Click on the **Parent 1 Search** button, **Parent 2 Search** button and **Child Search** button to complete the needed Ohio SACWIS person searches.

2. Click the radio button next to the person records to retain for each individual.

3. Click the **Associate Persons** button to add the Person IDs identified from Ohio SACWIS to the application.

4. The system presents the following message. Click **OK**.

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By taking this action all eligibility information will be cleared. A new request will need to be submitted after completing all person searches.

<div align="center">Cancel   OK</div>
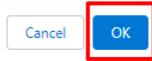
Reviewing an Application – Application Payments

This section will display any person/payment information that is found from the Ohio SACWIS Person searches completed.

Determining an Application

1. After thorough review, State Users can begin the approval/denial process. In fields where a pen icon (✏) appears, the user has edit access. Alternatively, you may click the **Edit** button in the upper right hand corner of the OAG record screen to begin modifying data.
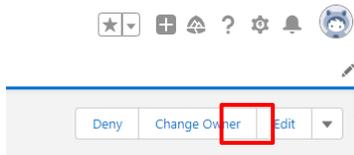
2. Ensure you have the application assigned to yourself.
3. Link the appropriate person to the participants in the **Person Search** section.
4. To complete the person search:
   a. Select the **Person Search** tab.
   b. Select the *Parent 1 Search* button.
   a. If the person you are searching for is in the returned search results, select the bubble to the left of the person in the search results.
   b. Select the *Associate Persons* button.
   c. If the person you are searching for is not in the returned search results, then select the green *Create Person* button.

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Important: Do not create a Person record unless you have made certain they do not already exist in Ohio SACWIS, to avoid creating unnecessary duplicates.

3. You will repeat this process for each person on the application.
4. After you have each person on the application searched and associated, return to the *Details* screen and conduct the eligibility search.
5. To conduct the eligibility search, select the *Retrieve Eligibility* button in the upper right corner of the screen.

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6. If the Eligibility search finds data related to Child placement or characteristics in Ohio SACWIS, you will receive a *Success* message (see below image).
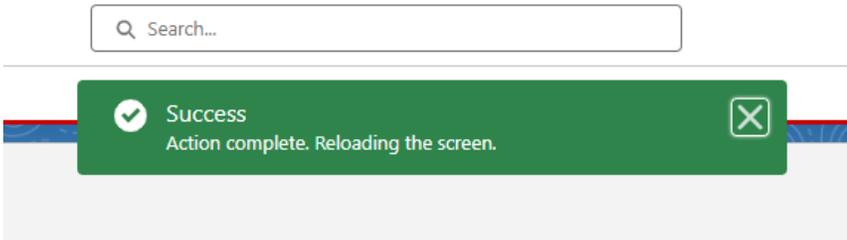
7. If no placement or characteristic data is found in Ohio SACWIS, you will receive the *No Match Found* message (see below image).
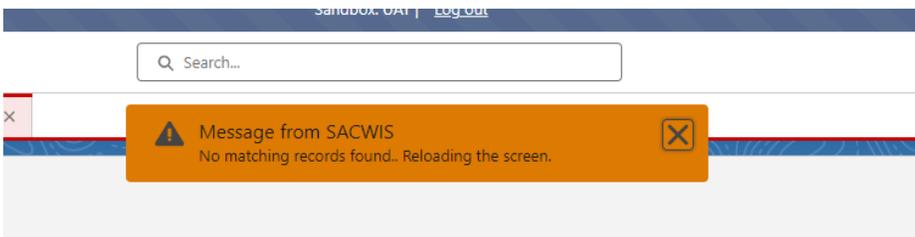
8. Characteristic and placement data will be displayed near the bottom of the **Details** tab, under the *Grant Eligibility* section. You will also see that the **Ohio SACWIS Finalized Date** field will be completed if there is a record found in Ohio SACWIS.

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9. Next, you will want to transition to the *Related* tab of the application.
10. In the *Related* tab, you will want to review the submitted documents to ensure you have received all the correct and compete forms to determine eligibility. If any forms are missing or incomplete, the application should be rejected with instructions for the applicant to submit or update the missing documentation (See rejection section below).
11. After you have reviewed all documentation and verified no additional items are needed you will need to return to the *Details* tab and scroll down to the *Grant Eligibility* section.
12. Select the pencil icon ![pencil] next the question you wish to update.
13. After selecting the icon all fields in the section will be editable.
14. Some questions will be auto filled at the time the application is submitted by the applicant. Responses can be updated by the reviewer as needed until the application is placed in **Approved** status.
15. Based on your review of the attached documents, applicant responses, characteristic and placement data, ensure the correct responses are in each of the eligibility fields. It is important that these fields are accurate, as the amount approved is determined by these responses.
16. After ensuring that all responses are complete and accurate, select the **Save** button.
17. Once **Save** is completed, select the pencil icon next to the **Review Completed** check box.
18. Click on the box to mark the **Review Completed**, then click **Save** at the bottom of the screen.

> **Note:** You will not be able to move forward in the approval process without marking this box.

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19. You have now completed the **Determining Eligibility** process.

Reject an Application

To return an application to the adoptive parent(s) because of missing information:

1. Click the **Related** tab.
2. Scroll to the **Approval History** section.
3. Click the **Reject** button.

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4. Enter **Comments** with the rejection reason and any additional details needed.

5. Select the **Reject** button at the bottom of the comment box.

Note: Application will return to applicant and not be directed to supervisor.

6. Your comments will be sent in an e-mail to the applicant(s), indicating what requirements they are missing. The adoptive parent(s) will have 31 days to complete the application and re-submit it to the State.

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Your submitted application for the Ohio Adoption Grant (OAD-00009) requires additional information. To continue to review and process your application, please submit the following required information. Please contact us at OFC-Ohioadoptiongrant@jfs.ohio.gov.ohio.gov if you should have any questions

Comments (if any): Test Reject

Approve an Application as a Reviewer

If the application meets the requirements for Approval as a Reviewer, follow these steps:

1. Click the **Details** tab.
2. Click the **Retrieve Eligibility** button at the top of the screen. This should interface the system with Ohio SACWIS to find any available data on adoption grant eligibility.

OAD_Grant **OAG-00082**		Retrieve Eligibility	Deny	Change Owner	▼
Status Submitted For Approval	Owner 👤 Sara Cruse				
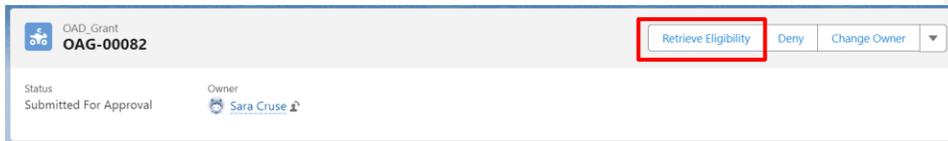
3. Complete all values in the **Grant Eligibility** section after clicking the pencil icon (🖉) to begin the edit process.
4. Check the **Review Completed** box.
5. Press **Save.**
6. Click the **Related** tab.
7. Scroll to the **Approval History** section.
8. Select the **Approve** button.

📄 Approval History (2)				Approve	Reject	▼
Step Name	Date	Comments	Status			
Line Level Approval	1/17/2024 4:35 PM		Pending			▼
Approval Request Submitted	1/17/2024 4:35 PM		Submitted			▼
		View All				

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9. Enter **Comments** with the approved amount and any additional details needed.
10. Select **Approve** at the bottom of the comment box.

Approve OAD_Grant

Comments

The adoptive family has met the requirements for a $20,000 grant.

Cancel   Approve

11. The system will present the message below if all the needed information has not been completed:

Please check Review Complete before Recommending for Action.

12. Otherwise, a green banner will appear indicating the application has been approved.

Supervisor Review

Once a reviewer makes a determination of the Application based on their review of requirements, the supervisor will get the application in their OAG Supervisor Queue. The supervisor will also receive an e-mail to notify them an Application is ready for review:

1. The supervisor will approve the work on any OAG Application in the status of **Recommended for Action**. This status indicates the reviewer has made a recommendation on that application and is sending it for final decision.

2. Start your review by clicking on the OAD-XXXX blue hyperlink number you wish to review (see highlighted picture above).

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3. The application with open under the **Details** tab showing basic information about the adoptive parent(s).

4. Click on the **Related** tab and scroll down to the **Approval History** section. The line level approval was the recommendation from the reviewer. **Comments** are also listed.

5. Click on the **Details** tab.

6. Scroll down to the Application requirements for a quick summary.

7. Click **Save** at bottom of screen.

8. Click on the **Related** tab

9. Scroll down to **Approval History** section.

10. Click appropriate response to **Approve** or **Reject**.

11. If the supervisor clicks **Approve**, **Comments** are required. Click **Approve** after entering the comment.

12. The **Approval History** will now show it has been changed to **Approved** status with the **Comments** that were added.

13. Click the **Home** at the top of the screen to return to your **Supervisor Queue** list view.

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Supervisor Rejection/Denial of Adoption Grant

1. If the supervisor clicks **Reject**, **Comments** are required to explain to the applicant what they need to edit, revise, or change to resubmit for approval again. This **Reject** triggers an e-mail to the applicant and changes the status to **Rejected**. The OAG application will be removed from the supervisor queue.

2. To deny the Application, click on the **Details** tab of the record, and then select the **Deny** button.

| Deny | Change Owner | Edit | ▼ |
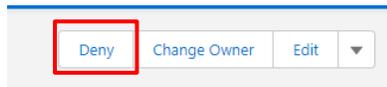
3. The system will then prompt you to enter **Denial Comments**. Click **Deny This Application**, which will then send an email to the applicant with the reasons.
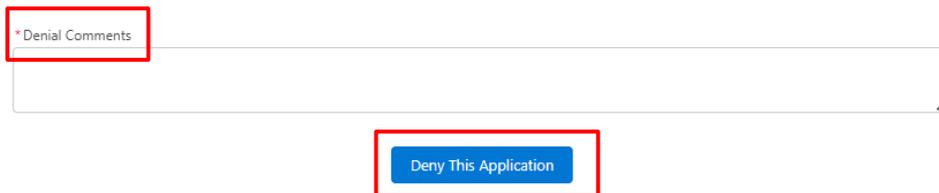
*Denial Comments

[Deny This Application]

Final Supervisor Review after CSEA review

Upon the return of an applicant's review for CSEA, the supervisor will need to complete additional steps if an arrearage applies to the grant amount.

1. Navigate to the section **Applications with Post CSEA Review**.

2. Supervisor will click on OAG number hyperlink.

3. Navigate to the **Application Status** area.

4. Double click on the **Post Approval Status** to change to **Final Review Complete**.

5. Click **Save.**

Second Review for Supervisors

When an application is **Denied**, the applicant has the right to submit it again to another supervisor for a second review. The review is completed by the supervisor and can then be denied again or approved.

Under the related tab, locate the section labeled Approval History.

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To Deny:

1. Click **Reject** on the Approval History subject line.

2. Add in final comments on reason for **Denial**.

3. Click **Reject** in the pop out box or click **Cancel** to go back.

4. Click on the **Home** tab to return to the queue.

> **Commented [BK7]:** Is this correct?

To Approve:

1. Review application for eligibility, completeness and accuracy under the details section.

2. Under the **Application Status** section, add in the approved amount.

3. Click **Save**.

4. Follow regular approval procedure as detailed above.

Help

If access issues are encountered attempted to utilize Ohio Adoption Grant, please contact SACWIS_ACCESS@jfs.ohio.gov.

If you encounter technical difficulties while using Ohio Adoption Grant, please contact the OFC Automated Systems Help Desk at SACWIS_HELP_DESK@jfs.ohio.gov.