Managing the Financial Workload for Eligibility Specialists

Knowledge Base Article

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Department of Children & Youth

Managing the Financial Workload for Eligibility Specialists

Overview

The **Financial Workload** functionality is an Ohio SACWIS tool that helps you manage eligibility, reimbursability, and adoption subsidy records. Although use of this functionality is optional, the system continues to automatically assign and terminate workload assignments as needed. Refer to the **Using Automatic Assignment and Termination Functionality** sub-section for more information.

In Ohio SACWIS, the **Financial Workload** is separated into five Title I-V-E areas: **Foster Care Maintenance (FCM)**, **Prevention Services**, **Adoption Subsidy, KGAP** and **Bridges Invoicing**. The navigation links within each area function the same way, but the data differs based on the workload selected.

Specifically, the **Financial Workload** functionality provides the following benefits, it:

- Allows Eligibility Specialists to manage their Action Items and Work Assignments.

- Includes a system-automated feature for the assignment and termination of Adoption Subsidy, FCM records, and Bridges Invoicing.

- Displays an assignment grid overview of the child's record(s) showing the Child's Name / ID / Gender / DOB, Case ID, Eligibility Type / Indicator, Reimbursability Indicator / Eff-End Date, Custody Start Date and Next Review.

- Provides hyperlinks to give Eligibility Specialists quick access to a child's records to view or complete necessary reviews. Hyperlinks also provide access to a child's person profile and case information.

- Provides hyperlinks to give Eligibility Specialists, Bridges Fiscal Worker, Bridges Fiscal Supervisor, Bridges Agency Admin or Bridges State Admin quick access to a young adult's bridges invoice records to view, edit or create new invoices if necessary.
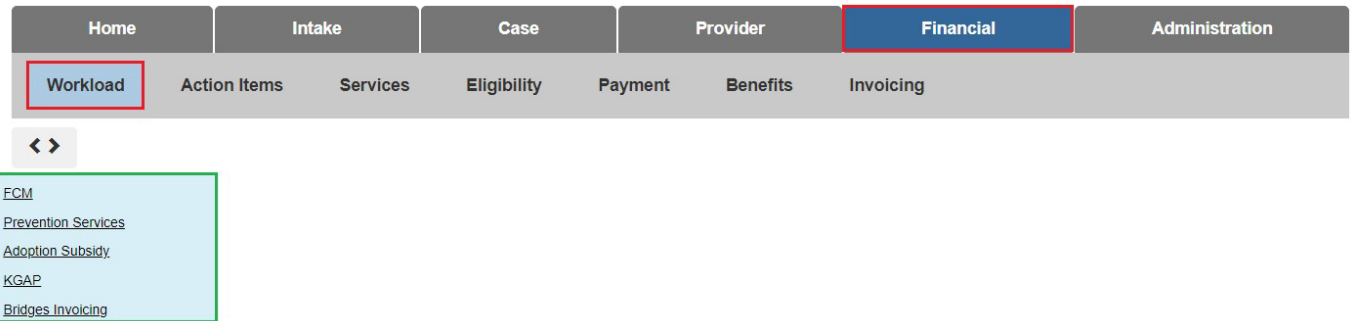
Note: Notifications pertaining to **FCM** or **Adoption Subsidy** records are sent only to the assigned Eligibility Specialist(s). If no Eligibility Specialist is assigned, the system sends notifications to all Eligibility Specialists within that agency.

Required Security Profile

To access the **Financial Workload**, Eligibility Specialists need a security profile of **Eligibility Specialist Workload**.

By having this profile, the system displays a **Workload** tab under the **Financial** tab. Once on the **Financial Workload** screen, the following five links appear in the **Navigation** menu: **FCM**, **Prevention Services**, **Adoption Subsidy**, **KGAP** and **Bridges Invoicing**.

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Home	Intake	Case	Provider	Financial	Administration

Workload	Action Items	Services	Eligibility	Payment	Benefits	Invoicing

< >

FCM
Prevention Services
Adoption Subsidy
KGAP
Bridges Invoicing

Using Automatic Assignment and Termination Functionality

Although Ohio SACWIS automatically assigns a child's Adoption Subsidy or FCM eligibility record to an Eligibility Specialist, the automatic assignment feature doesn't prevent other Eligibility Specialist from editing or viewing a child's subsidy or eligibility records.

For FCM Eligibility Records

- Automatic assignment to an Eligibility Specialist occurs when a child's eligibility record is determined and saved by that Eligibility Specialist.

- Automatic termination occurs when a custody episode ends or when the child's case is transferred to another agency.

For Adoption Subsidy Records

- Automatic assignment to an Eligibility Specialist occurs when that worker creates an adoption subsidy eligibility record, and the record is saved in an **Approved** status.

- Automatic termination occurs when an adoption subsidy end date is reached. The automatic termination occurs at the end of the following month. A delay in ending the adoption subsidy assignment is given in case an extension of the subsidy is required. When the adoption subsidy has been extended, the system continues the assignment of the current Eligibility Specialist.

For Bridges Invoicing Records

- Automatic assignment to an Eligibility Specialist, Bridges Fiscal Worker, Bridges Fiscal Supervisor, Bridges Agency Admin or Bridges State Admin happens when a Bridges Care and Placement legal status is entered.

- Automatic termination happens 45 days after the Bridges Care and Placement legal status is terminated.

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Navigating the Financial Workload Links

Complete the following steps to view **FCM Workload, Prevention Services Workload, Adoption Subsidy Workload, KGAP Workload** and **Bridges Invoicing Workload** information:

1. From the Ohio SACWIS **Home** screen, click the **Financial** tab.

2. Click the **Workload** tab.

Home	Intake	Case	Provider	Financial	Administration
Workload	Action Items	Services	Eligibility	Payment	Benefits	Invoicing

< >

FCM
Prevention Services
Adoption Subsidy
KGAP
Bridges Invoicing

Using the Action Items link

1. Click the **Action Items** link to view **FCM Workload** or **Adoption Subsidy Action Items**.

Home	Case	Provider	Financial	Administration
Workload	Action Items	Services	Eligibility	Payment	Benefits

FCM

51	63
Past Due	Upcoming

Prevention Services

2	0
Past Due	Upcoming

Add Custom Action Item For... ▾

Past Due FCM Items

Sort By: Closest to Due Date ▾ | Filter | Show more filters...

A complete list of all your **Financial Items** pertaining to **Foster Care Maintenance** and **Adoption Subsidy** appears in the **Action Items** sub-tab.

2. Click an **Action Item** link to view specific details.

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Important Information about Financial Workload Action Items:

- **Action Items** in the **Financial Workload** function the same way as they do in the worker's **Case Workload**.

- Completion of a work item **removes** the assignment from both the worker's **Financial Workload** and from the **Action Item** screen on the Ohio SACWIS desktop.

- **Action Items** that display in the **Financial Workload** also display on the worker's **Assignment Display** screen on their Ohio SACWIS desktop.

- Eligibility Specialists can only view their own **Action Items**, not those of other Eligibility Specialists. However, a Supervisor can view any worker's assignments.

- **FCM** display for all children who have an open / current eligibility record.

- **Adoption Subsidy** tab display for all children who have an open / current adoption subsidy record, regardless if the child's case is open or closed.

Navigating the Financial Workload Screen

A worker will complete the following steps to view **FCM Workload** information.

1. From the Ohio SACWIS **Home** screen, click the **Financial** tab.

2. Click the **Workload** tab.

3. Click **FCM** on the side navigation bar.

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The **FCM Assignments** screen displays.

4. To view **Assignments** for **yourself** select the appropriate name from the list. A supervisor will be listed first with other workers following.

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Home	Intake	Case	Provider	Financial	Administration

Workload	Action Items	Services	Eligibility	Payment	Benefits	Invoicing

‹ ›

FCM
Prevention Services
Adoption Subsidy
KGAP
Bridges Invoicing

FCM Assignments by Worker   FCM Assignments by Person   FCM Unassigned (26 cases)

Show workload by supervisor:

Test, Supervisor ▾   [Show Workload]

Test, Supervisor (Supervisor)
18 FCM Assignments ⌄

The **Assignments** for the selected **Worker** displays.

Sacwis, Susie (Supervisor)
14 FCM Assignments ⌃

Sort Susie's workload by:

Child Full Name (A-Z) ▾   [Sort]

Result(s) 1 to 14 of 14 / Page 1 of 1

Results per page: 25 [Go]

☐		Child Name / ID Gender Age DOB	Case Name / ID	Elig Type / Indicator	Reimb Indicator / Eff - End Date	Custody Start Date	Next Review
☐	edit assignment view payments	Lane, Lois / 1234567 Female Age 8, DOB 1/1/2015	Lane, Lois / 1234567	Initial / Yes	Yes / 02/01/2023 -	02/07/2020	
☐	edit assignment view payments	Test, Child / 1234567 Male Age 6, DOB 11/05/2016	Test, Child / 1234567	Initial / Yes	Yes / 02/01/2023 -	02/07/2020	

5. Click **Case Name/ID** on an **Assignment** to view the case.

6. When complete, click the **Close** button at the bottom of the screen.

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Last Revised: 08/20/2024

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Sort Susie's workload by:

Child Full Name (A-Z)   [Sort]

Result(s) 1 to 14 of 14 / Page 1 of 1   Results per page: 25 [Go]

☐		Child Name / ID Gender Age DOB	Case Name / ID	Elig Type / Indicator	Reimb Indicator / Eff - End Date	Custody Start Date	Next Review
☐	edit assignment	Lane, Lois / 1234567	Lane, Lois / 1234567	Initial / Yes	Yes / 02/01/2023 -	02/07/2020	
	view payments	Female Age 8, DOB 1/1/2015					
☐	edit assignment	Test, Child / 1234567	Test, Child / 1234567	Initial / Yes	Yes / 02/01/2023 -	02/07/2020	
	view payments	Male Age 6, DOB 11/05/2016					

Important: Eligibility Specialists assigned to a child's case versus Eligibility Specialists assigned via the Financial Workload are two separate functions. Assignment to the case allows edit and view capabilities to various components of the child's case. Assignment to a child's case also makes the record also appear on the worker's Case Workload. Assignments in the Financial Workload creates assignments to a child's FCM and Adoption Subsidy records with only view capabilities to a child's case. Also, the assignments in the Financial Workload do not appear on the worker's Case Workload.

Sorting Assignments

You have the option to **Sort** assignments when searching for specific cases by A-Z, Age, Custody Start date, etc.

1. On the **FCM Assignments, Adoption Subsidy, KGAP** or the **Bridges Invoicing screen**, select the drop down for **Sort Workload By.**
2. Click the **Sort** button.

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Your **Assignments** will appear in the **Sort** order you choose.

Reviewing the Grid Layout

The filtered **Results** appear in a **Grid**. For both **FCM** and **Adoption Subsidy**, the results include the **Child Name/ID/Gender/Age/DOB** and **Case Name/ID**. In addition, the following grid information appears:

For FCM:

- **Elig Type / Indicator:** Column displays an eligibility type of **Initial**, **Ongoing**, or **Age**. Also, **Yes** or **No** also displays depending on whether child is IV-E eligible.

- **Reimb Indicator Eff/End Date:** Column displays the date of the most recent reimbursement record. Since counties are no longer required to complete an annual redetermination for reimbursability other than for annual reasonable efforts, the date corresponds to the most recent reasonable effort determination – either initial or annual.

- **Custody Start Date:** Column shows when custody began.

- **Next Review:** Column displays the date of the next subsidy review.

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Sacwis, Susie   (Supervisor)
14 FCM Assignments ^

Sort Susie's workload by:

Child Full Name (A-Z) ▾   **Sort**

Result(s) 1 to 14 of 14 / Page 1 of 1   Results per page: 25 **Go**

		Child Name / ID Gender Age DOB	Case Name / ID	Elig Type / Indicator	Reimb Indicator / Eff - End Date	Custody Start Date	Next Review
☐	edit assignment / view payments	Lane, Lois / 1234567 / Female Age 8, DOB 1/1/2015	Lane, Lois / 1234567	Initial / Yes	Yes / 02/01/2023 -	02/07/2020	
☐	edit assignment / view payments	Test, Child / 1234567 / Male Age 6, DOB 11/05/2016	Test, Child / 1234567	Initial / Yes	Yes / 02/01/2023 -	02/07/2020	

For Prevention Services

- **Determination Type / Indicator:** Column displays an eligibility type of **Initial, Ongoing** or **Age**. Also, **Yes** or **No** also displays depending on whether child is IV-E eligible.

- **Effective Date:** Column displays the date Prevention Services took effect.

- **Next Review Date:** Column displays the date of the next subsidy review.

Sacwis, Susie   (Supervisor)
1 Assignments ^

Result(s) 1 to 1 of 1 / Page 1 of 1   Results per page: 25 **Go**

		Child Name / ID Gender Age DOB	Case Name / ID	Determination Type / Indicator	Effective Date	Next Review
☐	edit assignment / view payments	Test, Child / 12345678 / Age 4, DOB 08/22/2018	Test, Adult / 12345	Initial / Yes	07/18/2023	

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For Adoption Subsidy

- **Subsidy Type:** Column displays the most recent adoption subsidy record and a hyperlink to the subsidy record.

- **Subsidy Eff-End Dates:** Column displays the begin and end date of the child's subsidy.

- **Next Review Date:** Column displays the date of the next subsidy review.

Sacwis, Susie (Supervisor)
4 Adoption Subsidy Assignments ^

Subsidy Type:		Sort Susie's workload by:			
		Child Full Name (A-Z)			Filter

Result(s) 1 to 4 of 4 / Page 1 of 1   Results per page: 25 Go

☐		Child Name / ID Gender Age DOB	Case Name / ID	Subsidy Type	Subsidy Eff - End Date	Next Review
☐	edit assignment / view payments	Test, Child / 456789 / Male Age 14, DOB 07/17/2009	Test, Child / 456789	PASSS	07/01/2022 - 06/30/2023	
☐	edit assignment / view payments	Test, Child 2 / 12345678 / Male Age 4, DOB 10/24/2018	Test, Child 2 / 12345678	Adoption Assistance	11/20/2021 - 10/31/2036	

For KGAP

- **Subsidy Type:** Column displays the most recent KGAP record and a hyperlink to the KGAP record.

- **Subsidy Eff-End Date:** Column displays the begin and end date of the child's subsidy.

- **Next Review:** Column displays the date of the next subsidy review.

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Sacwis, Susie
1 KGAP Assignments ∧

Subsidy Type:		Sort Susie's workload by:		
		Child Full Name (A-Z)		Filter

Result(s) 1 to 1 of 1 / Page 1 of 1

Results per page: 25 | Go

☐		Child Name / ID Gender Age DOB	Case Name / ID	Subsidy Type	Subsidy Eff - End Date	Next Review
☐	edit assignment	Test, Child / 12345678		C21KGAP	-	
	view payments	Age 17, DOB 10/05/2005				

For Bridges Invoicing

- **Young Adult Name / ID:** Displays the young adults name and ID hyperlink to the young adults Person Overview screen.
- **Case Name / ID:** Displays the case name and case ID hyperlink to the young adults Bridges Case Overview screen.
- **Housing Type:** Displays the most recent housing type associated with the bridges invoice.
- **Housing Begin Date-End Date:** Column displays the date of the most recent housing record.
- **Custody Start Date:** Column shows the start date of the custody episode.
- **Last Line Item Completed:** Column displays a hyperlink of the date associated to the most recent line item with a status of Payment Created or Payment Issued for the young adult and will navigate user to the Search Invoice screen with the young adult in focus. If the young adult does not have any invoices with those status, then the link will not appear. A New / Pending Invoice hyperlink will also display which will navigate the worker to the Unprocessed Invoices screen with the selected young adult in focus to view In Progress invoices or create a new invoice if needed.

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| Assignments by Worker | Assignments by Person | Unassigned (1 cases) |

Show workload by supervisor:

Sacwis, Susie ▾   **Show Workload**

Test, Supervisor (Supervisor)
1 Bridges Assignments ⌃

Sort Cameron's workload by:

Young Adult Full Name (A - Z) ▾   **Sort**

Result(s) 1 to 1 of 1 / Page 1 of 1   Results per page: 25   **Go**

☐		Young Adult Name / ID	Case Name / ID	Housing Type	Housing Begin Date - End Date	Custody Start Date	Last Line Item Completed
☐	edit assignment view payments	Test Adult / 123456	Test, Adult / 121212	Leased Housing	07/29/2024	07/29/2024	New / Pending Invoice

If you have additional questions pertaining to this Deployment Communication, please contact the [Customer Care Center](#).

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