

# **Creating Adoption Assistance Subsidy Review Records**



**Department of  
Children & Youth**

**Knowledge Base Article**

# Creating Adoption Assistance Subsidy Review Records

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# Creating Adoption Assistance Subsidy Review Records

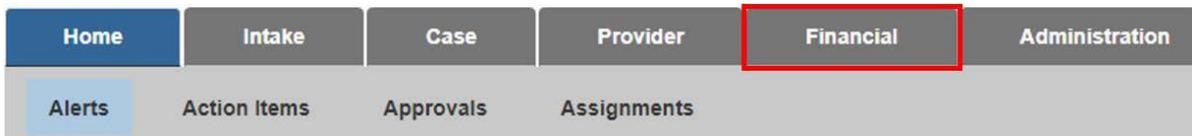
## Overview

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.

## Creating Adoption Assistance Subsidy Review Records

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.

The screenshot shows a navigation menu with tabs: Home, Intake, Case, Provider, Financial (highlighted), and Administration. Below these are sub-tabs: Workload, Action Items, Services, Eligibility (highlighted with a green box), Payment, and Benefits. Below the sub-tabs is a navigation bar with left and right arrow icons (highlighted with a green box). Below that is a 'Person Selection' section containing a 'Person Search' button (highlighted with a red box), a '~ OR ~' separator, a 'Person ID:' label, an empty text input field (highlighted with a red box), and a 'Go' button (highlighted with a blue box).

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.

# Creating Adoption Assistance Subsidy Review Records

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

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Name / ID: <a href="#">Duck, Dewey / 111111119</a>	Age, DOB: Age 3, 05/17/2017	Case ID:
---	--------------------------------	----------

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								
<a href="#">view</a>	Adoption Assistance	Any County Children Services	Duck, Donald & Duck, Daisy / 1234567	01/13/2020	Approved	\$500.00	appeal	

[Payee Information](#) v

**Add Subsidy**

Subsidy Type:  Adoption Type:  Add Subsidy

**Add Review**

Review Effective Date: \*  Review Type:  Add Review

The **Adoption Assistance Review** screen appears.

# Creating Adoption Assistance Subsidy Review Records

**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

# Creating Adoption Assistance Subsidy Review Records

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 parent(s) still 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.

# Creating Adoption Assistance Subsidy Review Records

## 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](#)

3. If extending the subsidy past the child's 18<sup>th</sup> 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.*

- |   |   |
|---|---|
| <input type="checkbox"/> SSI Eligible                             | <input type="checkbox"/> Developmental Disability or Medical Condition as diagnosed by an approved Qualified Professional |
| <input type="checkbox"/> SSD Eligible                             | <input type="checkbox"/> Special Education  |
| <input type="checkbox"/> State Vocational Rehabilitation Services |   |

## Creating Adoption Assistance Subsidy Review Records

- 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**

- Complete the **How verified** textbox.

How verified: [\(expand full screen\)](#)

- Select **Yes** or **No** from the dropdown menu in response to the following question: Has the child reported not being enlisted in the military?
- 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?	<input type="text"/>
Has the child reported not being married?	<input type="text"/>

### Child has Special Needs Factors:

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

## Creating Adoption Assistance Subsidy Review Records

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

**4. Child has Special Needs Factors.** [a](#)

*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
ADHD	Mental Health/Substance Abuse	08/26/2016	
Adjustment Disorder	Mental Health/Substance Abuse	04/04/2016	
Anxiety Disorder	Mental Health/Substance Abuse	08/26/2016	
Depression	Mental Health/Substance Abuse	08/26/2016	

[Update Characteristics](#)

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.

# Creating Adoption Assistance Subsidy Review Records

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

<input type="checkbox"/> Developmental disability	<input type="checkbox"/> Mental or psychological impairment (such as intellectual disability, emotional mental illness, or a learning disability)
<input type="checkbox"/> Physical impairment limiting 1 or more major life activity	<input type="checkbox"/> Medical condition causing distress, pain, dysfunction or social problems requiring ongoing treatment
<input type="checkbox"/> Mental impairment limiting 1 or more major life activity	
<input type="checkbox"/> Physiological impairment, cosmetic disfigurement, or anatomical loss affecting 1 or more body systems	

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

<input type="checkbox"/> Child or their biological family has a social or medical history establishing a substantial risk for developing a Clinically Diagnosed Special Needs Factor	<input type="checkbox"/> 6 years old or older
<input type="checkbox"/> Part of a sibling group being adopted together or is placed in the same adoptive placement of a sibling previously adopted	<input type="checkbox"/> Remained in Permanent Custody for more than 1 year before an adoptive placement
<input type="checkbox"/> Over 12 months and is a member of a minority, racial, or ethnic group making it difficult to place the child for adoption	<input type="checkbox"/> 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
	<input type="checkbox"/> 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: [\(expand full screen\)](#)

Creating Adoption Assistance Subsidy Review Records

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.

# Creating Adoption Assistance Subsidy Review Records

Eligibility Requirements	
<a href="#">View / Update Eligibility Requirements.</a>	
1. Provider meets Parental Requirements.	YES
2. Child meets maximum Age and School Requirements.	YES
3. Child has Special Needs Factors.	YES

[Determine Eligibility](#) Eligible for Continued Subsidy: [Not Determined](#)

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 or 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.

Actions	
Action Type: *	<input type="text"/>

# Creating Adoption Assistance Subsidy Review Records

## 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.

# Creating Adoption Assistance Subsidy Review Records

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: ⓘ <i>The Monthly Maintenance Cost of Care Amount displayed is from the most recent approved AA Subsidy Review or the Initial AA Subsidy.</i>	\$ 1058.00
New Subsidy Amount:	\$
<input type="button" value="Calculate Shares"/>	
Amended Adoption Assistance Agreement Date:	<input type="text"/>

**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.

## Creating Adoption Assistance Subsidy Review Records

**Actions**

Action Type: \*

Action Reason:

Notice of Suspension Mailed Date:  

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.

**Actions**

Action Type: \*

Action Reason:

Notice of Termination Mailed 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.

[Reviews](#) ^

<a href="#">edit</a>	Review Type: Notice of Suspension	Action Type: Notice of Suspension	Review Effective Date: Status: 12/02/2020 <a href="#">Approved</a>	Subsidy Amount: \$500.00	<a href="#">appeal</a> 
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The **Adoption Assistance Notice of Suspension** screen appears.

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

## Creating Adoption Assistance Subsidy Review Records

**Actions**

Action Type: \*

Action Reason:

Notice of Suspension Mailed Date: 

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.

**Adoption Assistance Suspension**

Subsidy Review ID:

Review Effective Date: \* 

Notice of Suspension Mailed Date: 12/01/2020

**Actions**

Action Type: \*

Action Reason:

Reason for Suspension: [\(expand full screen\)](#)

# Creating Adoption Assistance Subsidy Review Records

## 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](#) ^

<a href="#">edit</a>	Review Type: Notice of Termination	Action Type: Notice of Termination	Review Effective Date: 12/02/2020	Status: <a href="#">Approved</a>	Subsidy Amount: \$0.00	<a href="#">appeal</a>
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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: \*

Action Reason:

Notice of Termination Mailed Date:  

[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

# Creating Adoption Assistance Subsidy Review Records

## 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

Action Reason:

Reason for Termination: [\(expand full screen\)](#)

# Creating Adoption Assistance Subsidy Review Records

## 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: [\(expand full screen\)](#)

✓ ABC

4000

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**.

## Creating Adoption Assistance Subsidy Review Records

Process Approval

Work Item

ID:  Type: ADOPTPERSON Reference:   
Task ID:  Task Type: Adoption Assistance Task Reference:   
Task Status:

Routing/Approval Action

Action: \*

Comments:

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Agency:

Reviewers/ Approvers:

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

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