

# **Creating Adoption Subsidy Records**



**Department of  
Children & Youth**

**Knowledge Base Article**

# Creating Adoption Assistance Subsidy Records

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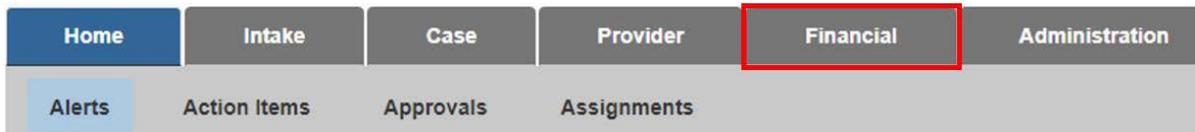
## Overview

This Knowledge Base Article discusses the **Adoption Subsidy** functionality detailing the steps for creation of an Adoption Assistance subsidy through completion of the approval process.

## Navigating to the Adoption Subsidy Screen

From the 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.

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The screenshot shows a navigation menu with the following structure:

- Home
- Intake
- Case
- Provider
- Financial (Active)
- Administration

Under the 'Financial' menu, there is a sub-menu with the following items:

- Workload
- Action Items
- Services
- Eligibility (Active)
- Payment
- Benefits

A dropdown menu is open under 'Eligibility', listing the following options:

- CRIS-E/OIES Inquiry
- Eligibility/Reimbursability
- Adoption Subsidy (Highlighted)
- Nonrecurring
- PASSS
- KPIP
- Medicaid Eligibility
- CRIS-E/OIES Inquiry History
- Medicaid Mailing Info
- Medicaid Card History

The **Adoption Subsidy** screen appears, displaying the **Person Selection** grid.

4. Click the **Person Search** button.

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

OR

4. Enter the **Person ID** for the child for which you are creating a subsidy.
5. Click the **Go** button.

The screenshot shows the 'Person Selection' screen with the following elements:

- Navigation menu: Home, Intake, Case, Provider, Financial (Active), Administration
- Sub-menu: Workload, Action Items, Services, Eligibility (Active), Payment, Benefits
- Navigation icons: < >
- Section header: Person Selection
- Buttons: Person Search (highlighted), ~ OR ~
- Form: Person ID: [input field] Go (highlighted)

Child details and the **Subsidy and Review History** appear.

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## Adding a Subsidy

1. Verify the child information for accuracy.
2. In the **Subsidy Type** field, select **Adoption Assistance** from the dropdown menu.
3. In the **Adoption Type** field choose the appropriate type of subsidy (see OAC 5101:2-49 for details)
4. Click the **Add Subsidy** button (not active until Adoption Type has been selected).

Person Selection

Person Search      ~ OR ~      Person ID:  Go

Name / ID: <a href="#">Duck, Louis / 99999999</a>	Age, DOB: Age 3, 05/17/2017	Case ID: 99999999
--	--------------------------------	----------------------

Assigned Workers:  
Caseworker, Sally

Subsidy and Review History

*An Adoption Subsidy record does not exist for the selected person.*

Add Subsidy

Subsidy Type:  Adoption Type:  Add Subsidy

Add Review

Review Effective Date: \*   Review Type:  Add Review

The **Adoption Assistance – Eligibility Criteria** screen appears.

## Completing the Eligibility Criteria

The Eligibility Criteria screen is a list of the requirements for the child and which requirements the child meets the eligibility. This screen also displays the progression of the subsidy in the navigation bar located under the child header. This bar also

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includes the section's status. As each section is completed, the red exclamation will change to a green checkmark.

1. In the **Anticipated Agreement Date** field, enter the approximate date the subsidy agreement is expected to be signed.
2. Click the **Eligibility Requirements** link.

**Adoption Assistance - Eligibility Criteria**

NAME / ID: <i>Duck, Louis / 99999999</i>	AGE, DOB: <i>3, 05/17/2017</i>	CASE ID: <i>99999999</i>	
ADOPTION SUBSIDY ID:	ADOPTION TYPE: <i>Public</i>	STATUS: <i>Pending</i>	ELIGIBLE: <i>Not Determined</i>

**Eligibility Criteria** **Provider Information** **Determination & Approval**

**Eligibility Criteria**

Anticipated Agreement Date: \*  Child's age as of the last day of the federal fiscal year:

**Eligibility Requirements**

View / Update [Eligibility Requirements](#)

1. Child is a U.S. Citizen or Qualified Alien.	INCOMPLETE
2. Child is free for adoption.	INCOMPLETE
3. Biological Parent is not in the Adoptive Home.	INCOMPLETE
4. Child has Special Needs Factors.	INCOMPLETE
5. Efforts have been made to place without a subsidy.	INCOMPLETE
6. Child meets maximum Age and School Requirement.	INCOMPLETE

**Determine Child's Eligibility** Child's Eligibility: **Not Determined**

Once the **Anticipated Agreement Date** is entered, the system will calculate the **Child's age as of the last day of the federal fiscal year** and refresh the screen to display the appropriate **Additional Eligibility Criteria**. These requirements will display between the **Eligibility Requirements** section and the **Determine Child's Eligibility** button. The sections are as follows:

## Creating Adoption Assistance Subsidy Records

Additional Eligibility Criteria	
View / Update <a href="#">Additional Eligibility Criteria</a> .	
<i>Child must meet at least 1 Criteria.</i>	
1. Child meets Best Interest Requirement.	INCOMPLETE
2. Child meets SSI Requirement.	INCOMPLETE
3. Child meets Minor Parent Requirement.	INCOMPLETE
4. Child was previously in receipt of AA.	INCOMPLETE

### When the Adoption Type is Independent:

Additional Eligibility Criteria	
View / Update <a href="#">Additional Eligibility Criteria</a> .	
<i>Child must meet at least 1 Criteria.</i>	
1. Child was previously in receipt of AA.	INCOMPLETE
2. Child meets SSI Requirement.	INCOMPLETE

## Completing Eligibility Requirements for Public Adoptions

### Child is a U.S. Citizen or Qualified Alien.

The system will determine this field as **Yes** or **No** from the information in the Child's **Person Profile**.

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## Eligibility Requirements

### 1. Child is a U.S. Citizen or Qualified Alien.

U.S. Citizen: Yes

If the information has not been entered, the user will have a link to navigate directly to the **Demographics** tab of the child's **Person Profile** to enter the information.

*No Citizenship/Alien Status information exists for this person.*

[Update Citizenship/Alien Status](#)

### Child is free for adoption.

1. Verify the information is correct, if updates are necessary, they can be completed within **Legal Actions** or the parent's **Person Profile** of SACWIS.

### 2. Child is free for adoption.

Is the Child in the Permanent Custody / Permanent Surrender of the Agency, and either parent's rights have been terminated or they are deceased? Yes

Legal Status: Permanent Custody

Mother's Termination of Parental Rights (TPR) Ruling Date: 09/23/2019

Father's Termination of Parental Rights (TPR) Ruling Date: 09/23/2019

**Note:** If parent(s) have a **Deceased Date** and it is prior to any **Termination of Parental Rights Ruling**, that parent's Deceased Date will display.

### Biological Parent is not in the Adoptive Home.

1. Select **Yes** or **No** from the dropdown menu in response to the following question: **Has either biological parent been in the adoptive home during the past 90 calendar days?**

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## 2. Biological Parent is not in the Adoptive Home.

Has either biological parent been in the adoptive home during the past 90 calendar days?

## Child has Special Needs Factors.

1. Clinically Diagnosed Characteristics that are active as of the Anticipated Agreement 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.

## 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 check box(es) beside applicable special needs that apply to the child under the **Clinically Diagnosed Special Needs Factors** and **Other Special Needs Factors**.

## Creating Adoption Assistance Subsidy Records

[View child's Case Services](#)  
[View child's Medical History](#)

**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

**Note:** To assist in selecting the special needs and negotiating the Subsidy Amount the hyperlink **View child's Case Services** and **View child's Medical History** allows the user to access the child's medical history.

3. Complete the How were Special Needs verified textbox.

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

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

1. Select **Yes** or **No** from the dropdown menu in response to the following question: **Has the agency made a reasonable but unsuccessful effort to place the child with an appropriate adoptive parent(s) without adoption**



## Creating Adoption Assistance Subsidy Records

6. Child meets maximum Age and School Requirements.

Is the Agreement Date on or before the end of the month of the child's 18th birthday? Yes

Anticipated Agreement Date: 11/01/2020

Child's age as of Anticipated Agreement Date: 16 years

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](#)

[Apply](#) [Save](#) [Cancel](#)

The user is taken back to the **Adoption Assistance-Eligibility Criteria** screen.

### Completing Eligibility Requirements for Private and Independent Adoptions

#### Child is a U.S. Citizen or Qualified Alien.

The system will determine this field as **Yes** or **No** from the information in the Child's **Person Profile**.

Eligibility Requirements

1. Child is a U.S. Citizen or Qualified Alien.

U.S. Citizen: Yes

If the information has not been entered, the user will have a link to navigate directly to the **Demographics** tab of the child's **Person Profile** to enter the information.

# Creating Adoption Assistance Subsidy Records

No Citizenship/Alien Status information exists for this person.

 [Update Citizenship/Alien Status](#)

## Child is free for adoption.

1. Select the child's current Legal Status from the **Legal Status** dropdown menu.
2. Select where the child was adopted from in the **Child Adopted From** dropdown menu.
3. Enter either the **Parent 1 Termination of Parental Rights (TPR) Ruling Date** or **Parent 1 Deceased Date**, whichever occurred first.
4. Enter either the **Parent 2 Termination of Parental Rights (TPR) Ruling Date** or **Parent 2 Deceased Date**, whichever occurred first.

### Eligibility Requirements

#### 1. Child is free for adoption.

Legal Status:	Permanent Surrender	
Child Adopted From:	Within the State of Ohio	
Parent 1 Termination of Parental Rights (TPR) Ruling Date:	04/29/2019	
Parent 1 Deceased Date:	03/08/2019	
Parent 2 Termination of Parental Rights (TPR) Ruling Date:	04/29/2019	
Parent 2 Deceased Date:	03/04/2019	

**Note:** If parent(s) have a **Deceased Date** and it is prior to any **Termination of Parental Rights Ruling**, that parent's Deceased Date will display.

# Creating Adoption Assistance Subsidy Records

## Biological Parent is not in the Adoptive Home.

2. Select **Yes** or **No** from the dropdown menu in response to the following question: **Has either biological parent been in the adoptive home during the past 90 calendar days?**

2. Biological Parent is not in the Adoptive Home.

Has either biological parent been in the adoptive home during the past 90 calendar days?

## Child has Special Needs Factors.

1. Clinically Diagnosed Characteristics that are active as of the Anticipated Agreement 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.

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](#)

## Creating Adoption Assistance Subsidy Records

- Place a checkmark(s) in the check box(es) beside applicable special needs that apply to the child under the **Clinically Diagnosed Special Needs Factors** and **Other Special Needs Factors**.

[View child's Case Services](#)  
[View child's Medical History](#)

**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

**Note:** To assist in selecting the special needs and negotiating the Subsidy Amount the hyperlink **View child's Case Services** and **View child's Medical History** allows the user to access the child's medical history.

- Complete the How were Special Needs verified textbox.

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

## Creating Adoption Assistance Subsidy Records

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

1. Select **Yes** or **No** from the dropdown menu in response to the following question: 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 rule 5101:2-49-03 of the Administrative Code?
2. Enter the reasoning for your selection in the **Please explain** narrative.

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?

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

Yes  No

### Child meets maximum Age and School Requirements.

**Note:** The system will populate the following fields using the child's **Date of Birth** from the **Person Profile** and the **Anticipated Agreement Date** entered on the **Adoption Assistance – Eligibility Criteria** screen:

- **Is the Agreement Date on or before the end of the month of the child's 18th birthday?**
  - **Anticipated Agreement Date**
  - **Child age as of Agreement Date**
1. If the child is under the age of 6, **Has the child reached compulsory school age and is attending school full-time?** Will prepopulate as **Not Required**.
  2. If the child is age 6 or older, select **Yes** or **No**.
    - If answered **Yes**, a school is required to be on the child's **Person Profile**.
  3. Click **Save**.

# Creating Adoption Assistance Subsidy Records

**6. Child meets maximum Age and School Requirements.**

Is the Agreement Date on or before the end of the month of the child's 18th birthday? Yes

Anticipated Agreement Date: 11/01/2020

Child's age as of Anticipated Agreement Date: 16 years

Has the child reached compulsory school age and is attending school full-time?

School Name	Beginning Grade	Start Date	End Date
<i>School information does not exist for this child.</i>			

[Update School Information](#)

[Apply](#) [Save](#) [Cancel](#)

The user is taken back to the **Adoption Assistance-Eligibility Criteria** screen.

## Completing Additional Eligibility Criteria for Children who are Over the Age Requirement

1. Click on the **Additional Eligibility Criteria** link.

**Additional Eligibility Criteria**

View / Update [Additional Eligibility Criteria.](#)

*Child must meet at least 1 Criteria.*

1. Child meets Best Interest Requirement.	<b>YES</b>
2. Child meets SSI Requirement.	<b>NO</b>
3. Child meets Minor Parent Requirement.	<b>NO</b>
4. Child was previously in receipt of AA.	<b>NO</b>
5. Child in custody of a PCSA/PCPA for at least 60 consecutive months.	<b>NO</b>
6. Child meets Sibling Placement Requirement.	<b>NO</b>

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The **Additional Eligibility Criteria** screen will appear.

## Child meets Best Interest Requirement for Public Adoptions

1. Verify the information is correct, if updates are necessary, they can be completed within the child's **Legal Actions** or the parent's **Person Profile** of SACWIS.

Additional Eligibility Criteria	
<b>1. Child meets Best Interest Requirement.</b>	
Has Best Interest been received?	Yes
Initial Legal Status:	Ex-Parte
Legal Status Effective Date:	05/24/2017
Court Ordered Best Interest Ruling Date:	05/24/2017

## Child meets Best Interest Requirement for Private Adoptions

**Note: Has Best Interest been received?** Pursuant to OAC 5101:2-49-02 entitled "Title IV-E adoption assistance (AA) eligibility criteria," **Best Interest is required** for Adoption Assistance.

1. Child meets Best Interest Requirement.	
Has Best Interest been received?	Required

## Child meets SSI Requirement.

1. Select **Yes** or **No** from the dropdown menu in response to the following question: **Does the child meet all Medicaid and disability requirements of Supplemental Security Income (SSI)?**

# Creating Adoption Assistance Subsidy Records

## 2. Child meets SSI Requirement.

*Medical or Disability Requirements of SSI can be determined by the Title IV-E Agency.*

Does the child meet all medical and disability requirements of Supplemental Security Income (SSI)?

No

*Child does not have a SSI benefit recorded in Client Benefits.*

## Child meets Minor Parent Requirement.

1. Select **Yes** or **No** from the dropdown menu in response to the following question: **Is this child a Child of a Minor Parent?**

## 3. Child meets Minor Parent Requirement.

Is this child a Child of a Minor Parent?

When **Yes** is selected for the above question, the section expands to capture additional information.

2. Select the child's minor parent by clicking the **Search for the Minor Parent button**.  
OR
3. If a **Living Arrangement** exists for the child, select the minor parent from the **Minor Parent** dropdown menu.

Verify the Minor Parent details.

## Creating Adoption Assistance Subsidy Records

Minor Parent Information:

~OR~ Minor Parent:

Minor Parent Name / ID:

 FCM Eligibility has not been completed for the selected Minor Parent.

Was the minor parent removed from a Specified Relative?

Initial Legal Status:

Legal Status Effective Date:

Court Ordered Best Interest Ruling Date:

**Note:** Once a person is selected, the **Minor Parent** fields will auto populate with the Minor Parent's information.

**Child was previously in receipt of AA.**

1. Select **Yes** or **No** from the dropdown menu in response to the following question: **Was the child in receipt of Adoption Assistance (AA) in a prior finalized adoption?**
2. Click **Save**.

4. Child was previously in receipt of AA.

Was the child in receipt of Adoption Assistance (AA) in a prior finalized adoption?

Apply

Save

Cancel

The **Adoption Assistance – Eligibility Criteria** screen will appear.

# Creating Adoption Assistance Subsidy Records

## Completing Additional Eligibility Criteria for Children who are Under the Age Requirement

1. Click on the **Additional Eligibility Criteria** link.

Additional Eligibility Criteria	
View / Update <a href="#">Additional Eligibility Criteria.</a>	
<i>Child must meet at least 1 Criteria.</i>	
1. Child was previously in receipt of AA.	INCOMPLETE
2. Child meets SSI Requirement.	INCOMPLETE
3. Child has a Reimbursable Minor Parent.	INCOMPLETE
4. Child meets ADC Relatedness Criteria.	INCOMPLETE
5. Child meets Sibling Requirement.	INCOMPLETE

The **Additional Eligibility Criteria** screen will appear.

### Child was previously in receipt of AA.

1. Select **Yes** or **No** from the drop-down menu in response to the following question: **Was the child in receipt of Adoption Assistance (AA) in a prior finalized adoption?**

Additional Eligibility Criteria	
1. Child was previously in receipt of AA.	
Was the child in receipt of Adoption Assistance (AA) in a prior finalized adoption?	<input type="text"/>

### Child meets SSI Requirement.

1. Select **Yes** or **No** from the drop-down menu in response to the following question: **Is the child eligible for Supplemental Security Income (SSI)?**

# Creating Adoption Assistance Subsidy Records

## 2. Child meets SSI Requirement.

*Medical or Disability Requirements of SSI must be determined by an SSI Administrator.*

Is the child eligible for Supplemental Security Income (SSI)?

*Child does not have SSI Recorded in Client Benefits.*

No

## Child has a Reimbursable Minor Parent.

1. Select **Yes** or **No** from the drop-down menu in response to the following question: **Has the agency received FCM reimbursement for Minor Parent including cost(s) for the child?**

## 3. Child has a Reimbursable Minor Parent.

Has the agency received FCM reimbursement for Minor Parent including cost(s) for the child?

## Child meets ADC Relatedness Criteria for Public Adoptions.

**Note:** This will display for children whose Initial Legal Status is not Voluntary Agreement for Care.

1. Verify the information is correct, if updates are necessary, go to the child's **Legal Actions** or **Eligibility** screens.

## 4. Child meets ADC Relatedness Criteria.

Does the child meet the Aid to Families with Dependent Children (ADC) Relatedness?

Yes

Initial Legal Status:

Ex-Parte

Legal Status Effective Date:

05/24/2017

FCM Eligibility History:

[view](#)

Eligibility Month:  
05/2017

Determination Type:  
Initial

Status:  
Complete

## Creating Adoption Assistance Subsidy Records

**Note:** To review a child's recorded eligibility click on the view link in front of the appropriate FCM Eligibility History record.

**Note:** This will display for children whose Initial Legal Status is Voluntary Agreement for Care.

1. Verify the information is correct, if updates are necessary, go to the child's **Legal Actions, Eligibility, or Payment Search** screens.

4. Child meets ADC Relatedness Criteria.	
Does the child meet the Aid to Families with Dependent Children (ADC) Relatedness?	Yes
Initial Legal Status:	Initial Voluntary Agreement for Care
Legal Status Effective Date:	<MM/DD/YYYY>
Has agency received reimbursement for the child? <i>Child must be determined reimbursable and the agency must have received at least one reimbursement.</i>	Yes

**Note:** To review a child's recorded eligibility click on the view link in front of the appropriate FCM Eligibility History record.

### Child meets ADC Relatedness Criteria for Private Adoptions.

1. Select **Initial Legal Status** from the dropdown menu.

4. Child meets ADC Relatedness Criteria.	
Initial Legal Status:	<input type="text"/>

2. When Permanent Surrender is selected, the following fields will display:
  - a. Select **Yes** or **No** from the dropdown menu in response to the following question: **Was there a petition to the court to remove the child from a specified relative within six months from the date the child lived with the specified relative from whom she/he is being removed?**

## Creating Adoption Assistance Subsidy Records

- b. Select **Yes** or **No** from the drop-down menu in response to the following question: **Was there a judicial determination that remaining in the home would be contrary to the welfare (Best Interest) of the child?**

Was there a petition to the court to remove the child from a specified relative within six months from the date the child lived with the specified relative from whom she/he is being removed?	<input type="text"/>
Was there a judicial determination that remaining in the home would be contrary to the welfare (Best Interest) of the child?	<input type="text"/>

3. When Voluntary Agreement of Care is selected, **Has the agency received reimbursements for the child?** will display and always be set to **No**.

4. Child meets ADC Relatedness Criteria.	
Initial Legal Status:	Initial Voluntary Agreement for Care <input type="text"/>
Has agency received reimbursement for the child?	No

### Child meets Sibling Requirement.

1. Select **Yes** or **No** from the dropdown menu in response to the following question: **Is the child placed in the same adoptive home as his or her sibling who meets the Additional Eligibility Criteria found in rule 5101:2-49-02?**
2. Click **Save**.

5. Child meets Sibling Requirement.	
Is the child placed in the same adoptive home as his or her sibling who meets the Additional Eligibility Criteria found in rule 5101:2-49-02?	<input type="text"/>
<input type="button" value="Apply"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>	

The **Adoption Assistance – Eligibility Criteria** screen will appear.

# Creating Adoption Assistance Subsidy Records

## Completing Additional Eligibility Criteria for Independent Adoptions

1. Click on the **Additional Eligibility Criteria** link.

Additional Eligibility Criteria	
View / Update <a href="#">Additional Eligibility Criteria.</a>	
<i>Child must meet at least 1 Criteria.</i>	
1. Child was previously in receipt of AA.	INCOMPLETE
2. Child meets SSI Requirement.	INCOMPLETE

The **Additional Eligibility Criteria** screen will appear.

### Child was previously in receipt of AA.

1. Select **Yes** or **No** from the dropdown menu in response to the following question: **Was the child in receipt of Adoption Assistance (AA) in a prior finalized adoption?**

Additional Eligibility Criteria	
1. Child was previously in receipt of AA.	
Was the child in receipt of Adoption Assistance (AA) in a prior finalized adoption?	<input type="text"/>

### Child meets SSI Requirement.

1. Select **Yes** or **No** from the dropdown menu in response to the following question: **Is the child eligible for Supplemental Security Income (SSI)?**
2. Click **Save**.

## Creating Adoption Assistance Subsidy Records

2. Child meets SSI Requirement.

*Medical or Disability Requirements of SSI must be determined by an SSI Administrator.*

Is the child eligible for Supplemental Security Income (SSI)?

Apply Save Cancel

The **Adoption Assistance – Eligibility Criteria** screen will appear.

### Determining Child’s Eligibility

Under the **Eligibility Requirements** and **Additional Eligibility Criteria** sections of the **Adoption Assistance – Eligibility Criteria** screen.

1. Click **Determine Child’s Eligibility**.

**Note:** If you have failed to complete any required information used in determining eligibility, validation messages will display at the top of the **Adoption Assistance – Eligibility Criteria** screen.

# Creating Adoption Assistance Subsidy Records

Eligibility Criteria ✓ **Provider Information** ! Determination & Approval !

Eligibility Criteria

Anticipated Agreement Date: \*  
12/06/2020 Child's age as of the last day of the federal fiscal year: 1 years

**Eligibility Requirements**

View / Update [Eligibility Requirements](#).

1. Child is a U.S. Citizen or Qualified Alien.	YES
2. Child is free for adoption.	YES
3. Biological Parent is not in the Adoptive Home.	YES
4. Child has Special Needs Factors.	YES
5. Efforts have been made to place without a subsidy.	YES
6. Child meets maximum Age and School Requirement.	YES

**Additional Eligibility Criteria**

View / Update [Additional Eligibility Criteria](#).

Child must meet at least 1 Criteria.

1. Child was previously in receipt of AA.	YES
2. Child meets SSI Requirement.	YES

**Determine Child's Eligibility** Child's Eligibility: Not Determined

**Next** Apply Save Cancel

1. Click the **Provider Information** tab or click **Next** at the bottom of the screen.

## Determining the Provider's Eligibility

1. Choose a provider from the **Potential Providers from Matching Conference** dropdown.  
OR
1. Click **Provider Search** to search for the Provider.  
OR
1. Enter the **Provider ID** number, then click **Go**.

# Creating Adoption Assistance Subsidy Records

## Adoption Assistance - Provider Information

NAME / ID: <b>Duck, Dewy / 99999999</b>	AGE, DOB: 3, 05/17/2017	CASE ID: 99999999	
ADOPTION SUBSIDY ID: 27584520	ADOPTION TYPE: Public	STATUS: Pending	ELIGIBLE: Not Determined

Eligibility Criteria **Provider Information** Determination & Approval

**Provider Information**

Potential Providers from Matching Conference:  ~ OR  ~ OR

The **Adoption Assistance-Provider Information** screen will refresh, displaying the provider's information.

1. Verify **Provider Details** are correct.
2. Enter the **Application Received Date**.
3. Depending on the Adoption Type, verify or enter the **Adoptive Placement Date**.

**Provider Information**

~ OR ~

Provider Name / ID: Duck, Donald & Duck, Daisy / 99999999	Payee Name / ID: Daisy Duck / 1111119 <a href="#">Edit Payee</a>	Payee Address: 555 Pond View Dr <u>Duckville, OH 55555-5555</u>	Payment Method: Check
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Application Received Date:

Adoptive Placement Date:

## Creating Adoption Assistance Subsidy Records

**Note:** For public adoptions the **Adoptive Placement Date** will be auto populated.

4. Verify or enter the **Approval Date**.
5. Enter the **BCI Received Date** for each adoptive parent.
6. Enter the **FBI Received Date** for each adoptive parent.

The screenshot shows a web form titled "Home Study Details". Under the "Home Study Details:" section, there is a label "Approval Date:" followed by a date input field with a calendar icon. Below this is a horizontal separator line. Under the "Subsidy Details:" section, there are two rows for "Parent 1:" and "Parent 2:". Each parent row contains two date input fields: "BCI Received Date:" and "FBI Received Date:", each with a calendar icon. All four date input fields are highlighted with a red rectangular border.

**Note:** If the **Home Study** has not been recorded in SACWIS, the **Approval Date** must be entered.

7. Click **Next** or click the **Determination & Approval** tab at the top of the screen.

**Note:** When the Provider is associated to other subsidies the history will display at the bottom of screen and allow the user to view the subsidy details.

## Creating Adoption Assistance Subsidy Records

Subsidy History Details						
	Subsidy Type	Agency Name	Person Name / ID	Status	Effective Date End Date	Subsidy Amount
<a href="#">view</a>	Adoption Assistance	Any County Children Services Board	Dewey Duck / 5555555	Denied	05/31/2024	
<a href="#">view</a>	Adoption Assistance	Another County Job and Family Services	Louie Duck /	Approved	09/12/2017 11/30/2023	\$900.00

[Previous](#)
[Next](#)
[Apply](#)
[Save](#)
[Cancel](#)

The **Adoption Assistance-Determination & Approval** screen appears.

### Completing the Determination and Approval

1. Verify or enter the **Adoption Finalized Date**.
2. Enter the **Agreement Date**.
3. Enter the **Child's Social & Medical History Form (JFS01616) Provided Date**.

Eligibility Criteria 
Provider Information 
Determination & Approval

**Determination & Approval**

Application Received Date: 10/01/2020	Adoptive Placement Date: 09/01/2020
Anticipated Agreement Date: 11/01/2020	Adoption Finalized Date: <input style="border: 2px solid red;" type="text" value=""/>
Agreement Date: <input style="border: 2px solid red;" type="text" value=""/>	Child's Social & Medical History Form (JFS01616) Provided Date: <input style="border: 2px solid red;" type="text" value=""/>

4. Click **Determine Eligibility**.
5. Enter any **Comments**.

## Creating Adoption Assistance Subsidy Records

**Note:** The system recalculates the Child's Eligibility using the newly entered **Agreement Date**. The **Child's Eligibility Determination** and **Provider's Eligibility Determination** as well as the overall **Eligible** will be presented.

Child's Eligibility Determination: INCOMPLETE

---

Provider's Eligibility Determination: ⓘ INCOMPLETE

Determine Eligibility Eligible: Not Determined

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

✓ ABC  
4000

Once the **Eligible** is **YES** or **NO**, the screen will expand to display the **Subsidy Details**.

If Eligible is **NO**:

6. Enter the **Denial Date**.

## Creating Adoption Assistance Subsidy Records

[Determine Eligibility](#) Eligible: **NO**

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

[✓ ABC](#)  
[4000](#)

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**Subsidy Details**

Denial Date:  

If Eligible is **YES**:

7. Enter the date to begin the subsidy payments in the **Subsidy Effective Date** field.
8. Verify/Update the **Monthly Maintenance Cost of Care**. The auto population is a 6-month average calculated from the maintenance cost of the placement including any clothing, graduation expenses, childcare and personal incidentals.
9. Enter the agreed upon **Subsidy Amount**.

**Note:** Based on the Monthly Maintenance Cost of Care, Subsidy Amount and Subsidy Effective Date you can view the breakdown of Federal, State and Local Shares by clicking on **Calculate Shares**. This button will be available in build 4.10.

# Creating Adoption Assistance Subsidy Records

[Determine Eligibility](#) Eligible: YES

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

[✓ ABC](#)  
[4000](#)

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**Subsidy Details**

Subsidy Effective Date:   End Date: 03/31/2024

Monthly Maintenance Cost of Care Amount: [?](#)  
 [Recalculate Cost of Care](#)

Statewide Maximum: \$1162

Subsidy Amount:  [Calculate Shares](#)

## Completing the Medicaid Matching Section

There are three methods the system will use to locate a potential match:

- **Multiple Matches**
- **Exact Match**
- **No Match**

**Note:** The system will display only one of the match methods listed above to the User.

# Creating Adoption Assistance Subsidy Records

## Exact/Potential Match:

1. To view Ohio SACWIS Case Members, click **Ohio SACWIS Case Members** to expand the page.

2. Select the **Radio button** for the most appropriate Medicaid Match for the youth.

**Note:** The system defaults to the Not Answered Radio button. The User will not be able to save the record with this option selected.

**Ohio Benefits (OB) Person Matching for Medicaid**

Select the most appropriate match for the youth in custody

Youth Name: **Test, Child**      OB Case Address: **123 Test Rd, Test OH 12345**      SSN: **No Match**

Match Type: Ohio Benefits was able to match to a youth by Name, Gender, and DOB, review the potential match carefully to ensure it is a correct match.      DOB: **06/22/2019**      Gender: **Female**      Race: **White**

[Ohio Benefits Case Members](#) ▾

None of the above records are a match for the Ohio SACWIS Youth.

Not Answered

## Multiple Matches:

**Ohio Benefits (OB) Person Matching for Medicaid**

Select the most appropriate match for the youth in custody

Youth Name: **Test, Child**      OB Case Address: **123 W SPRING ST, LIMA, OH 45801**      SSN: **No Match**

Match Type: Ohio Benefits found multiple potential matching persons for the request, select the appropriate match, or select None of the person match.      DOB: **04/04/2013**      Gender: **Male**      Race: **White**

[Ohio Benefits Case Members](#) ^

Case Member Names	DOB / Age	Gender	Relationship to child
Test, Mom	09/01/1976; 48	Female	Mom
Test, Dad	03/22/1969; 56	Male	Dad
Test, Aunt/Uncle	12/06/1971; 53	Female	Aunt/Uncle (up to 3 greats)

Youth Name: **Test, Child**      OB Case Address: **2434 WALES AVE, LIMA, OH 45805**      SSN: **No Match**

Match Type: Ohio Benefits found multiple potential matching persons for the request, select the appropriate match, or select None of the person match.      DOB: **04/04/2013**      Gender: **Male**      Race: **White**

[Ohio Benefits Case Members](#) ^

Case Member Names	DOB / Age	Gender	Relationship to child
Test, Child			

None of the above records are a match for the Ohio SACWIS Youth.

Not Answered

# Creating Adoption Assistance Subsidy Records

## No Match:

Once the record has been saved, Ohio Benefits will process the Medicaid application for this youth without a previous Ohio Benefits case associated to this youth. The type of record saved below may be different than the record the user is saving.

### Ohio Benefits (OB) Person Matching for Medicaid

Ohio Benefits did not find any person who is a possible match to the youth in custody. Upon completion of the Initial removal record, OB will process the Medicaid application but there will not be a previous OB case associated to this youth.

3. Select the most appropriate option from the results returned for the Youth. If no possible results are returned, the User will not need to make a selection.

## Completing the Medicaid Details Section

1. Make a selection for **Managed Care Organization (MCO) Plan Selection**, if applicable.

### Medicaid Details

This person has already been matched with the Ohio Benefits person (1234567).

#### Managed Care Organization (MCO) Plan Selection:

AmeriHealth Caritas

The above plan has been pre-determined by your agency.

**Note:** The MCO Selection dropdown will default in several scenarios based on predetermined information recorded in your Agency:

- **Drop down is Non-Modifiable:** Your Agency has Pre-Selected to use the ODM Enrollment Broker to select the youth's MCO plan.
- **An MCO has been Pre-Determined by your Agency.** This is still modifiable by the User as needed.
- **An MCO appears in the drop down:** System is displaying the Youth's last known MCO plan. This is still modifiable by the user.
- **No Default:** The User will need to select a MCO Plan.

2. Click the **Process for Approval** button.

**Note:** When the **Subsidy Details** section is complete, click the **Process for Approval** button. If you have failed to complete any required information for the AA Subsidy, validation messages will display at the top of the **Adoption Assistance –**

# Creating Adoption Assistance Subsidy Records

**Determination & Approval** screen with any incomplete fields.

Medicaid Details

Youth already associated to OB Person ID <99999>

**Managed Care Organization (MCO) Plan Selection:**

AmeriHealth Caritas

*The above plan has been pre-determined by your agency by default.*

Previous Apply Save Cancel Process For Approval

The **Process Approval** screen appears.

## Processing for Approval

1. If all requirements for the AA Subsidy have been completed, the **Process Approval** screen appears.
2. Select from the **Action** dropdown menu.
3. If you do not have approval access rights, select from the **Reviewers/Approvers** dropdown menu.

# Creating Adoption Assistance Subsidy Records

## 4. Click **Save**.

Process Approval

Work Item

ID: \_\_\_\_\_ Type: ADOPTPERSON Reference: \_\_\_\_\_  
Task ID: \_\_\_\_\_ Task Type: Adoption Assistance Task Reference: \_\_\_\_\_

Task Status: \_\_\_\_\_

Routing/Approval Action

Action: \*

Comments:

2000

Agency:

Reviewers/ Approvers:

The **Adoption Subsidy History** screen appears, displaying the status of the subsidy.

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

