

**Completing State Adoption
Maintenance Subsidy (SAMS)
Review Records**



Knowledge Base Article

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

Table of Contents

Overview	3
Navigating to the Adoption Subsidy Program Screen	3
Adding a Review	4
Completing a SAMS Review/Annual Redetermination	5
Completing Subsidy Review Actions	9
Creating a SAMS Modification	11
Creating a Notice of Suspension	14
Suspending a SAMS Subsidy	15
Creating a Notice of Termination	17
Terminating a Subsidy	23

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

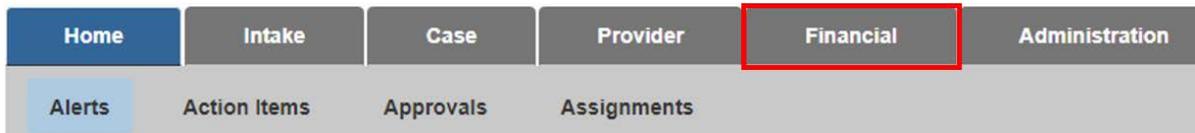
Overview

This document outlines the process for entering a State Adoption Maintenance Subsidy (SAMS) review. This includes all Review Types for SAMS: Modification, Redetermination, Notice of Suspension, Notice of Termination, Suspension and Termination. The document depicts the instructions by section.

Navigating to the Adoption Subsidy Program Screen

From the SACWIS Home screen:

1. Click the **Financial** tab.



The **Financial** sub-menu will appear.

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.

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.

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

6. Click the **Go** button.



The **Person Selection** grid appears, now displaying the child's details; additionally, the **Subsidy and Review History** grid appears.

Note: The **Subsidy and Review History** grid displays all AA, SAMS and AAC subsidies created for the identified child. Each subsidy will have a drawer with Payee Information and Reviews (if they exist).

Adding a Review

SAMS 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.

1. Verify the correct child is in focus.
2. Enter the **Review Effective Date**.

Important: The review date shows the date that the review is effective and is required to generate payments. If a subsidy amount is being modified or terminated, the review date shows the date the modified amount is effective or terminated.

3. Make a selection from the **Review Type** drop-down menu (on the screen below, **Annual Redetermination** was selected).

Note: Once you have entered a Review Effective Date and selected a Review Type, the **Add Review** button will be activated.

4. Click, **Add Review**.

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

Person Selection

Person Search: - OR - Person ID:

Name / ID: Age, DOB: Case ID:

Assigned Workers:

Subsidy and Review History

Subsidy Type	Agency Name	Provider Name / ID	Application Received Date	Status	Current Amount
SAMS Effective 07/07/2015 - 01/31/2030					
SAMS	CDJFS		07/07/2015	Approved	\$1,000.00
Payee Information <input type="button" value="v"/> Reviews <input type="button" value="v"/>					
Adoption Assistance Effective 07/13/2015					
Adoption Assistance	CDJFS		07/07/2015	Denied	\$0.00
Payee Information <input type="button" value="v"/>					

Add Subsidy

Subsidy Type: Adoption Type:

Add Review

Review Effective Date: Review Type:

The **SAMS Annual Redetermination** screen appears.

Note: Views for this screen will vary depending on the Review Type selected in the previous step.

Completing a SAMS Review / Annual Redetermination

1. The **Review Effective Date** will populate from what was previously entered but is editable.
2. Enter the **Redetermination Notice Sent Date**.

Note: **Redetermination Notice Sent Date** will only show if the **Review Type** selected is **Annual Redetermination**.

3. Enter the **Form Received Date**.

Note: If the **Review Type** is **Annual Redetermination**, **Notice of Termination** or **Termination**, Eligibility Requirements must be completed.

4. Click the **Eligibility Requirements** hyperlink.

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

SAMS Annual Redetermination

NAME / ID: AGE, DOB CASE ID ADOPTION TYPE: Public

SAMS Annual Redetermination

Subsidy Review ID: Review Effective Date: 03/01/2021

Redetermination Notice Sent Date: 02/22/2021 Form Received Date: 02/25/2021

Eligibility Requirements

View / Update: Eligibility Requirements.

1. Provider meets Parental Requirements.	INCOMPLETE
2. Child meets Age Requirements.	INCOMPLETE
3. Provider meets SAMS Income Requirement.	INCOMPLETE

Determine Eligibility Eligible for Continued Subsidy: Not Determined

The user is taken to the **Eligibility Requirements** screen.

Eligibility Requirements

1. Provider meets Parental Requirements.

Is the adoptive parent(s) still financially supporting the child?

2. Child meets Age Requirements.

Is the child under 18 years of age? Yes

Child's age as of Review Effective Date: 9 years 2 months

3. Provider meets SAMS Income Requirement.

Family size including adopted child(ren):

120% Median Income for a family of the same size: \$0.00

Provider's Annual Gross Income: \$

Apply Save Cancel

Provider meets Parental Requirements.

1. Select the **Yes** or **No** from the drop-down menu in response to the question:
Is the adoptive parents(s) still financially supporting the child?

Eligibility Requirements

1. Provider meets Parental Requirements.

Is the adoptive parent(s) still financially supporting the child?

Child meets maximum Age Requirements.

The system will populate the following fields using the child's **Date of Birth** from the **Person Profile** and the **Review Effective Date**:

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

- Is the child under 18 years of age?
- Child's age as of Review Effective Date

Note: If extending the subsidy past the child's 18th birth month, select **Yes** from the drop-down 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. When **Yes** is selected for **Is this review for an extension?** The question, **Is the child mentally or physically disabled as diagnosed by a qualified professional?** will display. If **Yes** is selected, the **Person Characteristics** section will appear.

2. Child meets Age Requirements.

Is the child under 18 years of age? Yes

Child's age as of Review Effective Date: 9 years 2 months

- Clinically Diagnosed Characteristics that are active as of the Review Effective Date will display in the **Person Characteristics** grid. 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
Positive Toxicology Screen at Birth - Cocaine	Prenatal/Birth	<MM/DD/YYYY>	<MM/DD/YYYY>

Update Characteristics

1. Complete the **How verified** textbox.

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

✓ ABC
4000

Provider meets SAMS Income Requirement.

1. Enter the **Family size including adopted child(ren)**.

Note: The screen will refresh and display **120% Median Income for a family of the same size**.

2. Enter the **Provider's Annual Gross Income**.

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

3. Click, **Save**.

3. Provider meets SAMS Income Requirement.

Family size including adopted child(ren):

120% Median Income for a family of the same size: \$0.00

Provider's Annual Gross Income: \$

The user is brought to the **SAMS Annual Redetermination** screen.

Under the **Eligibility Requirements** section.

1. Click **Determine Eligibility**.

SAMS Annual Redetermination

NAME / ID	AGE, DOB	CASE ID	ADOPTION TYPE Public

Your data has been saved.

SAMS Annual Redetermination

Subsidy Review ID:

Review Effective Date: 01/04/2021

Redetermination Notice Sent Date: 12/23/2020

Form Received Date: 12/30/2020

Eligibility Requirements

[View / Update Eligibility Requirements.](#)

1. Provider meets Parental Requirements.	YES
2. Child meets Age Requirements.	YES
3. Provider meets SAMS Income Requirement.	YES

Eligible for Continued Subsidy: Not Determined

The **SAMS Annual Redetermination** screen appears, displaying the eligibility determination.

SAMS Annual Redetermination

NAME / ID	AGE, DOB	CASE ID	ADOPTION TYPE Public

Your data has been saved.

SAMS Annual Redetermination

Subsidy Review ID:

Review Effective Date: 01/04/2021

Redetermination Notice Sent Date: 12/23/2020

Form Received Date: 12/30/2020

Eligibility Requirements

[View / Update Eligibility Requirements.](#)

1. Provider meets Parental Requirements.	YES
2. Child meets Age Requirements.	YES
3. Provider meets SAMS Income Requirement.	YES

Eligible for Continued Subsidy: YES

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

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

Completing Subsidy Review Actions

1. Make a selection from the **Action Type** drop-down menu.

Note: The Action Type is defaulted to the selected Review Type and not modifiable unless the Review Type is Annual Redetermination. If the family is no longer eligible for continued subsidy, the Action Type will default to Notice of Termination and you will need to select an **Action Reason** and enter a **Notice of Termination mailed date**.

Note: When the Review Type is Annual Redetermination and Eligibility is Yes, the Action Type drop-down menu will display **Maintain Subsidy**, **Modification**, and **Notice of Suspension**. For assistance in selecting the Action Type, see 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.

When the **Action Type** of **Maintain Subsidy** is selected:

2. Verify the **Subsidy Amount** is correct, if updates are necessary, select a **Modification**.

The screenshot shows a web interface for determining eligibility. At the top left is a blue button labeled "Determine Eligibility". At the top right, a green box contains the text "Eligible for Continued Subsidy: YES". Below this is a section titled "Actions" with a dropdown menu for "Action Type:" set to "Maintain Subsidy". Below the "Actions" section is a section titled "Subsidy Details" with a field for "Subsidy Amount:" set to "\$300.00".

When the **Action Type** of **Modification** is selected:

3. Select the **Action Reason** from the drop-down menu.
4. Enter the Requested Amount.
5. Select **Yes** or **No** from the drop-down 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.

- 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.

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

- When **Have the agency and adoptive parents agreed upon a new subsidy amount?** in the Actions section is **Yes**, the current **Subsidy Amount** displays in the **Subsidy Details** section and additional fields will display.

6. Enter the **New Subsidy Amount**.
7. Enter the Amended SAMS Agreement Date.

The screenshot shows a web form with two main sections: 'Actions' and 'Subsidy Details'. In the 'Actions' section, 'Action Type' is set to 'Modification', 'Action Reason' is 'Adoptive Parent(s) Request', 'Requested Amount' is \$250.00, and the question 'Have the agency and adoptive parents agreed upon a new subsidy amount?' is answered 'Yes'. The 'Subsidy Details' section shows a 'Subsidy Amount' of \$300.00. Below this, there are three input fields: 'New Subsidy Amount' (empty), 'Amended SAMS Agreement Date' (empty), and a date picker icon.

When the **Action Type** of **Notice of Suspension** is selected:

8. Select the **Action Reason** from the drop-down menu.
9. Enter the **Notice of Suspension Mailed Date**.

Note: The **Notice of Suspension Mailed Date** can be entered at a later date.

10. Enter text in the Comments box (not required).
11. Click, **Process for Approval**.

The screenshot shows the same web form as above, but with 'Action Type' set to 'Notice of Suspension'. The 'Action Reason' field is empty, and the 'Notice of Suspension Mailed Date' field is empty. The 'Subsidy Amount' remains \$300.00. Below the 'Subsidy Details' section, there is a large 'Comments' text area with a 'Process for Approval' button at the bottom left. The 'Process for Approval' button is highlighted with a red box.

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

The **Process Approval** screen appears.

Process Approval

Work Item

ID: [Redacted] Type: ADOPTPERSON Balance: [Redacted]
Task ID: [Redacted] Task Type: Adoption Subsidy Review Task Reference: [Redacted]
Task Status: [Redacted]

Reviewing Approval Action

Action: * Please Select An Action

Comments:

Agency: County Department of Job and Family Services

Reviewers/Approver: Please Select A Reviewer/Approver

Save Cancel

The **Adoption Subsidy** screen appears.

1. Click the **Reviews** drawer.

✔ Your data has been changed

Person Selection

Person ID: Go

Name / ID: [Redacted] Age, DOB: [Redacted] Case ID: [Redacted]

Assigned Workers: [Redacted]

Subsidy and Review History

Subsidy Type	Agency Name	Provider Name / ID	Application Received Date	Status	Current Amount	
SAMS Effective 07/07/2015 - 01/31/2030						
SAMS	CDJFS	[Redacted]	07/07/2015	Approved	\$1,000.00	Reset

Payee Information Reviews

The **Reviews** drawer will expand to display the reviews.

Subsidy and Review History

Subsidy Type	Agency Name	Provider Name / ID	Application Received Date	Status	Current Amount	
SAMS Effective 07/07/2015 - 01/31/2030						
SAMS	CDJFS	[Redacted]	07/07/2015	Approved	\$1,000.00	Reset

Payee Information Reviews

Review Type:	Action Type:	Review Effective Date:	Status:	Subsidy Amount:
Annual Redetermination	Maintain Subsidy	01/07/2021	Pending Approval	\$1,000.00

Creating a SAMS Modification

Navigate to the **Adoption Subsidy** screen.

1. Enter the **Review Effective Date**.
2. Select **Modification** from the **Review Type** drop-down menu (this will activate the Add Review button).
3. Click, **Add Review**.

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

The **SAMS Modification** screen appears.

4. The **Review Effective Date** will populate but is editable.
5. Enter the **Form Received Date**.
6. The **Action Reason** will pre-populate with **Modification**.
7. Make a selection from the **Action Reason** drop-down menu. Upon selecting the **Action Reason**, the screen will expand.
8. Enter the **Requested Amount**.
9. Select, **Yes** or **No**, from drop-down menu in response to the following question: **Have the agency and adoptive parents agreed upon a new subsidy amount?**
10. If No is selected, Subsidy Details will display. The current Subsidy Amount will pre-populate. The user can make any necessary comments and Process for Approval.
11. If Yes is selected in response to, Have the agency and adoptive parents agreed upon a new subsidy amount?, Subsidy Details will display including the current Subsidy Amount.
12. Enter the **New Subsidy Amount**.
13. Enter the **Amended SAMS Agreement Date**.
14. Enter any **Comments** as needed.
15. Click, **Process for Approval**.

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

SAMS Modification

NAME / ID: [redacted] AGE, DOB: [redacted] CASE ID: [redacted] ADOPTION TYPE: Public

SAMS Modification

Subsidy Review ID: [redacted] Review Effective Date: 01/18/2021

Form Received Date: 01/11/2021

Actions

Action Type: Modification
Action Reason: Adoptive Parent(s) Request
Requested Amount: \$ 100.00
Have the agency and adoptive parents agreed upon a new subsidy amount? Yes

Subsidy Details

Subsidy Amount: \$1,000.00
New Subsidy Amount: \$ [redacted]
Amended SAMS Agreement Date: [redacted]

Comments: (expand full screen) [redacted] ABC 4000

Process for Approval

The **Process Approval** screen appears.

1. Make a selection from the **Action** drop-down menu.
2. Make a selection from the **Reviewers/Approvers** drop-down menu.
3. Click, **Save**.

Process Approval

Work Item

ID: [redacted] Type: ADOPTPERSON Reference: [redacted]
Task ID: [redacted] Task Type: Adoption Subsidy Review Task Reference: [redacted]
Task Status:

Waiting/Approval Action

Action: * Please Select An Action *
Comments: [redacted]
Spell Check Close

Agency: County Department of Job and Family Services
Reviewers/ Approvers: Please Select A Reviewer/Approver *

Save Cancel

Once the approval has been processed, the **Adoption Subsidy** screen will appear.

4. Click the **Reviews** drawer to see the added Review.

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

Subsidy Type	Agency Name	Provider Name / ID	Application Received Date	Status	Current Amount	
SAMS Effective 10/18/2016 - 04/30/2033						
SAMS	CDJFS		08/04/2016	Approved	\$300.00	add

Review Type	Action Type	Review Effective Date	Status	Subsidy Amount	
Notice of Suspension	Notice of Suspension	01/18/2021	Incomplete	\$300.00	

Creating a Notice of Suspension

Navigate to the **Adoption Subsidy** screen.

1. Enter the **Review Effective Date**.
2. Select **Notice of Suspension** from the **Review Type** drop-down menu (this will activate the Add Review button).
3. Click, **Add Review**.

The **SAMS Notice of Suspension** screen appears.

- The **Review Effective Date** will populate but is editable.
 - The **Action Reason** will pre-populate with **Notice of Suspension**.
4. Make a selection from the **Action Reason** drop-down menu.
 5. Enter the **Notice of Suspension Mailed Date**.
 6. Enter any **Comments**.

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

Suspending a SAMS Subsidy

1. Navigate to the most recently **Approved** review with a **Review Type** of **Notice of Suspension**.
2. Click the **edit** link.

Subsidy Type	Agency Name	Provider Name / ID	Application Received Date	Status	Current Amount
SAMS	CDJFS		06/01/2015	Approved	\$300.00

Review Type	Action Type	Review Effective Date	Status	Subsidy Amount
Notice of Suspension	Notice of Suspension	03/01/2021	Approved	\$300.00

The **SAMS Notice of Suspension** screen appears.

Information previously entered in the associated **Notice of Suspension** Review will populate.

3. Verify the **Notice of Suspension Mailed Date** is accurate (it will populate but is editable).
4. Click, **Suspend Subsidy**.

SAMS Notice of Suspension

Subsidy Review ID: [] Review Effective Date: 03/01/2021

Actions

Action Type: Notice of Suspension

Action Reason: Adoption Not Finalized Within 12 Months

Notice of Suspension Mailed Date: 03/01/2021

Suspend Subsidy

Comments: (expand full screen)
test

Apply Save Cancel

The **SAMS Suspension** screen appears.

5. Make a selection from the **Action Reason** drop-down menu.
6. Enter narrative in the **Reason for Suspension** textbox.
7. Add **Comments** if needed.
8. Click, **Process for Approval**.
9. Enter the **Review Effective Date**.

Note:

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

- The Review Effective Date cannot be prior to issued SAMS payments.
- The **Notice of Suspension Mailed Date** will pre-populate.
- The **Action Type** will default to **Suspension**.

SAMS Suspension

NAME / ID: _____ AGE, DOB: _____ CASE ID: _____ ADOPTION TYPE: Public

SAMS Suspension

Subsidy Review ID: _____ Review Effective Date: *

Notice of Suspension Mailed Date: 03/01/2021

Actions

Action Type: *

Action Reason:

Reason for Suspension: (expand full screen)

Comments: (expand full screen)

The **Process Approval** screen appears.

1. Follow instructions previously discussed for processing and approval.
2. Click, **Save**.

The **Adoption Subsidy** screen appears.

3. Click the **Reviews** drawer.

The **Reviews** drawer will expand to display the **Notice of Suspension**.

CDJFS & OIEA Issues
 Eligibility/Financials
 Adoption Subsidy
 Assessments
 FASIS
 KIDS
 Medicaid Eligibility
 CDJFS & OIEA Issues/History
 Medicaid Medical Info
 Medicaid Care History
 Child Support/Enforcement
 Child Support Information

Your data has been changed.

Person Selection

Person Search - OR - Person ID:

Name / ID: _____ Age, DOB: _____ Case ID: _____

Assigned Workers: _____

Subsidy and Review History

Subsidy Type	Agency Name	Provider Name / ID	Application Received Date	Status	Current Amount
Adoption Assistance Effective 03/24/2017 - 03/31/2025					
Adoption Assistance	CDJFS		03/24/2017	Approved	\$600.00

Payee Information

Reviews

Review Type	Action Type	Review Effective Date	Status	Subsidy Amount
Notice of Suspension	Notice of Suspension	01/11/2021	Approved	\$600.00

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

Creating a Notice of Termination

1. Navigate to the **Adoption Subsidy** screen.
2. Enter the **Review Effective Date**.
3. Select, **Notice of Termination** from the **Review Type** drop-down menu (this will activate the Add Review button).
4. Click, **Add Review**.

CRIS-E/OIES Inquiry
Eligibility/Reimbursability
Prevention Services
Adoption Subsidy
Nonrecurring
PASSS
KPIP
Medicaid Eligibility
CRIS-E/OIES Inquiry History
Medicaid Mailing Info
Medicaid Card History
Child Support Referral
Child Support Information

Person Selection

Person Search ~ OR ~ Person ID: Go

Name / ID: Age, DOB: Case ID:

Assigned Workers:

Subsidy and Review History

	Subsidy Type	Agency Name	Provider Name / ID	Application Received Date	Status	Current Amount		
SAMS Effective 10/18/2016 - 04/30/2033								
view	SAMS	<input type="text"/>	<input type="text"/>	08/04/2016	Approved	\$300.00	appeal	
		CDJFS						
							Payee Information	
							Reviews	
Adoption Assistance Effective 10/19/2016								
view	Adoption Assistance	<input type="text"/>	<input type="text"/>	08/04/2016	Denied	\$0.00	appeal	
		CDJFS						
							Payee Information	

Add Subsidy

Subsidy Type: Adoption Type:

Add Review

Review Effective Date: * Review Type:

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

The **SAMS Notice of Termination** screen appears.

Note: The **Review Effective Date** will populate, but it is editable.

5. Click the **Eligibility Requirements** link.

SAMS Notice of Termination

NAME / ID: [REDACTED] AGE, DOB: [REDACTED] CASE ID: [REDACTED] ADOPTION TYPE: *Public*

SAMS Notice of Termination

Subsidy Review ID: [REDACTED] Review Effective Date: * 03/08/2021 

Eligibility Requirements

View / Update [Eligibility Requirements](#)

1. Provider meets Parental Requirements.	INCOMPLETE
2. Child meets Age Requirements.	INCOMPLETE
3. Provider meets SAMS Income Requirement.	INCOMPLETE

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

The **Eligibility Requirements** screen appears.

Eligibility Requirements

NAME / ID: [REDACTED] AGE, DOB: [REDACTED] CASE ID: [REDACTED] ADOPTION TYPE: *Public*

 Your data has been saved. 

Eligibility Requirements

1. Provider meets Parental Requirements.

Is the adoptive parent(s) still financially supporting the child?

2. Child meets Age Requirements.

Is the child under 18 years of age? Yes

Child's age as of Review Effective Date: 5 years 10 months

Provider meets Parental Requirements.

1. Select the **Yes** or **No** from the drop-down menu in response to the question:
Is the adoptive parents(s) still financially supporting the child?

1. Provider meets Parental Requirements.

Is the adoptive parent(s) still financially supporting the child?

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

Child meets maximum Age Requirements.

2. Child meets Age Requirements.

Is the child under 18 years of age? Yes

Child's age as of Review Effective Date: 5 years 10 months

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**

Note: If extending the subsidy past the child's 18th birth month, select **Yes** from the drop-down 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. When **Yes** is selected for **Is this review for an extension?** The question, "**Is the child mentally or physically disabled as diagnosed by a qualified professional?**" will display. If **Yes** is selected, the **Person Characteristics** section will appear.

2. 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
Postive Toxicology Screen at Birth - Cocaine	Prenatal/Birth	<MM/DD/YYYY>	<MM/DD/YYYY>

Update Characteristics

3. Complete the **How verified** textbox.

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

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

Provider meets SAMS Income Requirement.

4. Enter the **Family size including adopted child(ren)**.

Note: The screen will refresh and display **120% Median Income for a family of the same size**.

5. Enter the **Provider's Annual Gross Income**.
6. Click, **Save**.

3. Provider meets SAMS Income Requirement.

Family size including adopted child(ren):	<input style="border: 2px solid red;" type="text"/>
120% Median Income for a family of the same size:	\$0.00
Provider's Annual Gross Income:	<input style="border: 2px solid red;" type="text"/>

The user is brought to the **SAMS Notice of Termination** screen.

Under the **Eligibility Requirements** section.

1. Click **Determine Eligibility**.

SAMS Notice of Termination

Subsidy Review ID: Review Effective Date:

Eligibility Requirements

[View / Update Eligibility Requirements.](#)

1. Provider meets Parental Requirements.	YES
2. Child meets Age Requirements.	YES
3. Provider meets SAMS Income Requirement.	YES

Eligible for Continued Subsidy: Not Determined

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

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

Once the Eligible for Continued Subsidy is **YES** or **NO**, the screen will expand to display the **Actions** section.

The **Action Type** will default to **Notice of Termination**.

2. Select the **Action Reason** from the drop down.
3. Enter the **Notice of Termination Mailed Date**.
4. Enter **Comments**.
5. **Process for Approval**.

The screenshot shows a web form interface. At the top left is a blue button labeled "Determine Eligibility". At the top right, the text "Eligible for Continued Subsidy: YES" is displayed in green. Below this is a grey header bar with the word "Actions" in a white box. The form contains three fields: "Action Type:" with a dropdown menu showing "Notice of Termination"; "Action Reason:" with an empty dropdown menu; and "Notice of Termination Mailed Date:" with an empty date picker. Below these fields is a large text area for "Comments:" with a link "(expand full screen)". To the right of the comments area are two buttons: a blue "ABC" button and a grey "4000" button. At the bottom left, a blue button labeled "Process for Approval" is highlighted with a red box.

The **Process Approval** screen appears.

1. Follow process approval directions previously listed in this article.
2. Click, **Save**.

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

The **Adoption Subsidy** screen appears.

3. Click the **Reviews** drawer.

The **Reviews** drawer will expand to display the **Notice of Termination**.

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

Your data has been changed

Person Selection

Person Search - OR - Person ID:

Name / ID: Age, DOB: Case ID:

Assigned Workers:

Subsidy and Review History

Subsidy Type	Agency Name	Provider Name / ID	Application Received Date	Status	Current Amount
SAMS Effective 02/26/2008 - 07/31/2022					
SAMS	CDJFS		01/30/2008	Approved	\$300.00

Payee Information

Reviews

Review Type	Action Type	Review Effective Date	Status	Subsidy Amount
Notice of Termination	Notice of Termination	01/11/2021	Approved	\$300.00

To continue terminating the subsidy, see the **Terminating a Subsidy** section below.

Terminating a Subsidy

1. In order to terminate a subsidy, navigate to the Adoption Subsidy screen and locate the most recently Approved review with a Review Type of **Notice of Termination**.
2. Click the **edit** link.

Adoption Subsidy

Person Search - OR - Person ID:

Name / ID: Age, DOB: Case ID:

Assigned Workers:

Subsidy and Review History

Subsidy Type	Agency Name	Provider Name / ID	Application Received Date	Status	Current Amount
SAMS Effective 02/26/2008 - 02/28/2021					
SAMS	CDJFS		01/30/2008	Approved	\$300.00

Payee Information

Reviews

Review Type	Action Type	Review Effective Date	Status	Subsidy Amount
Notice of Termination	Notice of Termination	01/11/2021	Pending	\$300.00

The **SAMS Notice of Termination** screen appears.

3. Information previously entered in the associated **Notice of Termination** Review will populate for review.
4. Verify the **Notice of Termination Mailed Date** is accurate (it will pre-populate but is editable).
5. If everything is correct, no changes need be made. Click **Terminate Subsidy**.

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

SAMS Notice of Termination

Subsidy Review ID:

Review Effective Date: * 

Eligibility Requirements

View / Update [Eligibility Requirements](#).

1. Provider meets Parental Requirements.	YES
2. Child meets Age Requirements.	YES
3. Provider meets SAMS Income Requirement.	YES

Actions

Action Type: *

Action Reason:

Notice of Termination Mailed Date: 

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

The **SAMS Termination** screen appears.

6. Enter the **Review Effective Date**.
7. Click the **Eligibility Requirements** link.

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

SAMS Termination

Subsidy Review ID: Review Effective Date: * 

Notice of Termination Mailed Date:
03/09/2021

Eligibility Requirements

View / Update [Eligibility Requirements](#)

1. Provider meets Parental Requirements.	INCOMPLETE
2. Child meets Age Requirements.	INCOMPLETE
3. Provider meets SAMS Income Requirement.	INCOMPLETE

The **Eligibility Requirements** screen appears.

Eligibility Requirements

1. Provider meets Parental Requirements.

Is the adoptive parent(s) still financially supporting the child?

2. Child meets Age Requirements.

Is the child under 18 years of age? Yes

Child's age as of Review Effective Date: 9 years 4 months

Provider meets Parental Requirements.

1. Select the **Yes** or **No** from the drop-down menu in response to the question:
Is the adoptive parents(s) still financially supporting the child?

1. Provider meets Parental Requirements.

Is the adoptive parent(s) still financially supporting the child?

Child meets Age Requirements.

2. Child meets Age Requirements.

Is the child under 18 years of age? Yes

Child's age as of Review Effective Date: 9 years 4 months

The system will populate the following fields using the child's **Date of Birth** from the **Person Profile** and the **Review Effective Date**.

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

- Is the child under 18 years of age?
- Child's age as of Review Effective Date

Note: If extending the subsidy past the child's 18th birth month, select **Yes** from the drop-down 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. When **Yes** is selected for **Is this review for an extension?** The question, "**Is the child mentally or physically disabled as diagnosed by a qualified professional?**" will display. If **Yes** is selected, the **Person Characteristics** section will appear.

2. 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
Postive Toxicology Screen at Birth - Cocaine	Prenatal/Birth	<MM/DD/YYYY>	<MM/DD/YYYY>

Update Characteristics

3. Complete the **How verified** textbox.

How verified: (expand full screen)

✓ ABC

4000

Provider meets SAMS Income Requirement.

1. Enter the **Family size including adopted child(ren)**.

Note: The screen will refresh and display **120% Median Income for a family of the same size**.

2. Enter the **Provider's Annual Gross Income**.

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

3. Click, **Save**.

3. Provider meets SAMS Income Requirement.

Family size including adopted child(ren):

120% Median Income for a family of the same size: \$0.00

Provider's Annual Gross Income: \$

The **SAMS Termination** screen appears.

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.

Once the Eligible for Continued Subsidy is **YES** or **NO**, the screen will expand to display the **Actions** section.

SAMS Termination

NAME / ID: AGE, DOB: CASE ID: ADOPTION TYPE: *Public*

✔ Your data has been saved. ✕

SAMS Termination

Subsidy Review ID: Review Effective Date: *
05/03/2021

Notice of Termination Mailed Date:
04/01/2021

Eligibility Requirements

[View / Update Eligibility Requirements.](#)

1. Provider meets Parental Requirements.	YES
2. Child meets Age Requirements.	YES
3. Provider meets SAMS Income Requirement.	YES

Eligible for Continued Subsidy: Not Determined

The Action Type will default to Termination.

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

2. Select the **Action Reason** from the drop-down menu.
3. Enter **Reason for Termination**.
4. Enter **Comments**.
5. Click, **Process for Approval**.

Actions

Action Type: * Termination

Action Reason:

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

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

The **Process Approval** screen appears.

1. Follow process approval directions previously listed in this article.
2. Click, **Save**.

Process Approval

Work Item

ID: Type: ADOPTPERSON Reference:

Task ID: Task Type: SAMS Review Task Reference:

Task Status:

Routing/Approval Action

Action: * Please Select An Action

Comments:

Agency: County Department of Job and Family Services

Reviewers/ Approvers: Please Select A Reviewer/Approver

Completing State Adoption Maintenance Subsidy (SAMS) Review Records

The **Adoption Subsidy** screen appears.

3. Click the **Reviews** drawer.

Person Selection

Person ID: [Go](#)

Subsidy and Review History

	Subsidy Type	Agency Name	Provider Name / ID	Application Received Date	Status	Current Amount	
SAMS Effective 07/07/2015 - 05/31/2021							
view	SAMS	CDJFS		07/07/2015	Approved	\$300.00	appeal

Payee Information ▾

Reviews ▾

The **Reviews** drawer expands to display the **Termination**.

Reviews ^

view	Review Type:	Action Type:	Review Effective Date:	Status:	Subsidy Amount:	
	Termination	Termination	05/03/2021	Terminated	\$300.00	appeal

If you need additional information or assistance, please contact the SACWIS Help Desk at: 614-466-0978, select #3, then select #5.