# Managing the Financial Workload for Eligibility Specialists

Ohio SACWIS

# Knowledge Base Article

# Managing the Financial Workload for Eligibility Specialists

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# Managing the Financial Workload for Eligibility Specialists

## Overview

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

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

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

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

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

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

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

**Note:** Notifications pertaining to **FCM** or **Adoption Subsidy** records are sent only to the assigned Eligibility Specialist(s).  If no Eligibility Specialist is assigned, the system sends notifications to all Eligibility Specialists within that agency.

## Required Security Profile

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

By having this profile, the system displays a **Workload** tab under the **Financial** tab. Once on the **Financial Workload** screen, the following four links appear in the **Navigation** menu: **FCM**, **Prevention Services**, **Adoption Subsidy** and **KGAP**.
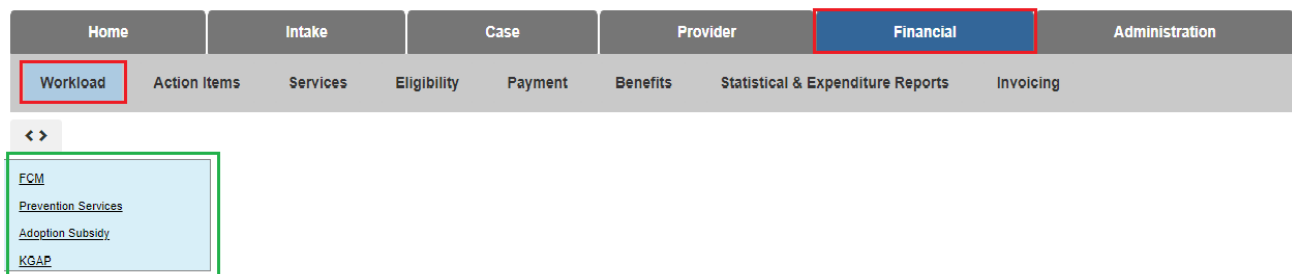
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## Using Automatic Assignment and Termination Functionality

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

### For FCM Eligibility Records

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

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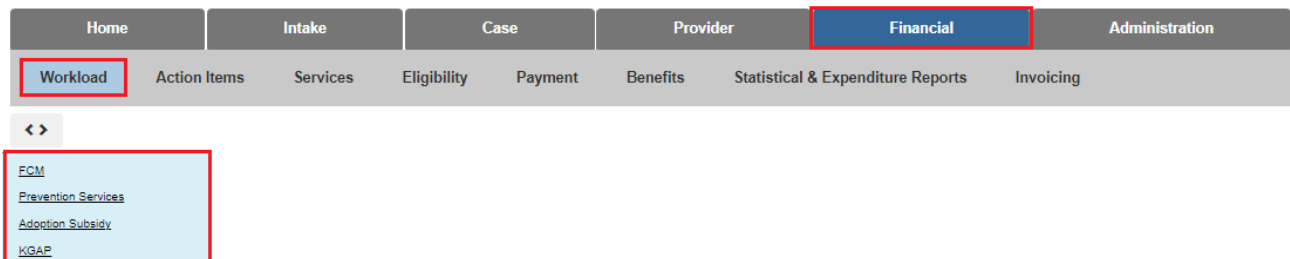
### For Adoption Subsidy Records

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

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

## Navigating the Financial Workload Links

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

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

2. Click the **Workload** tab.

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## Using the Action Items link

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



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

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



**Important Information about Financial Workload Action Items:**

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

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

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

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

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

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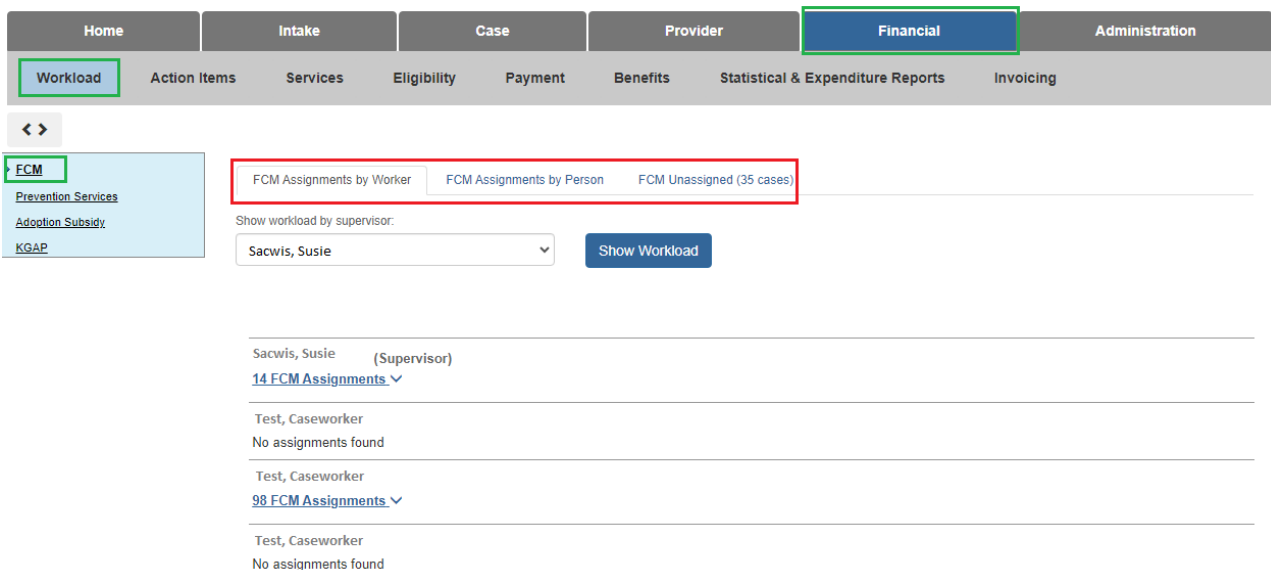
## Navigating the Financial Workload Screen

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

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

2. Click the **Workload** tab.

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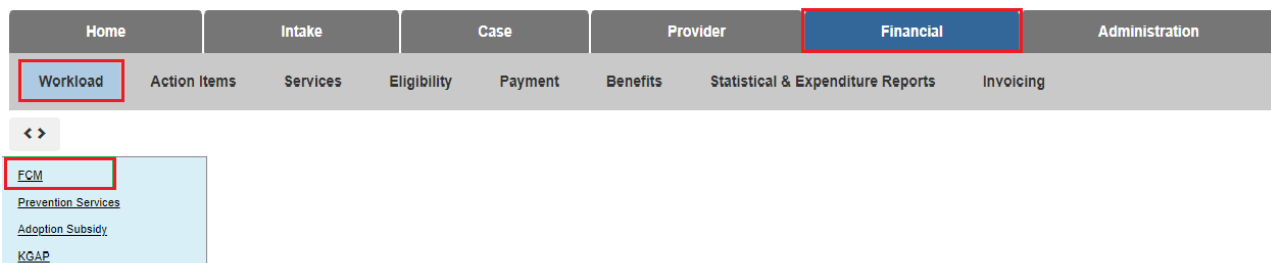


The **FCM Assignments** screen displays.

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



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

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

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

Sacwis, Susie   (Supervisor)
14 FCM Assignments ∧

| Sort Susie's workload by: | | | |
|---|---|---|---|
| Child Full Name (A-Z) | | Sort | |

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

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

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

## Sorting Assignments

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

1. On the **FCM Assignments screen**, select the drop down for **Sort Workload By.**
2. Click the **Sort** button.

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| FCM Assignments by Worker | FCM Assignments by Person | FCM Unassigned (35 cases) |
|---|---|---|

Show workload by supervisor:

Sacwis, Susie ⌄    **Show Workload**

---

Sacwis, Susie **(Supervisor)**
**14 FCM Assignments** ⌃

**Sort Susie's  workload by:**

Custody Start Date (Most Recent First) ⌄    **Sort**

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Results per page: 25    **Go**

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

## Reviewing the Grid Layout

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

**For FCM:**

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

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

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

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

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Sort Susie's workload by:

| Child Full Name (A-Z) | ⌄ |

[Sort]

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

Results per page: 25 [Go]

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

## For Prevention Services

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

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

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

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

Results per page: 25 [Go]

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

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## For Adoption Subsidy

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

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

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

**Sacwis, Susie** (Supervisor)
**4 Adoption Subsidy Assignments** ^

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

Result(s) 1 to 4 of 4 / Page 1 of 1

Results per page: 25  Go

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

## For KGAP

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

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

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

Sacwis, Susie
**1 KGAP Assignments** ^

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

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

Results per page: 25  Go

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

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# Managing the Financial Workload for Eligibility Specialists

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at SACWIS_HELP_DESK@childrenandyouth.ohio.gov .

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