Subsidized Guardianship
Continued Eligibility and Related Notices & Decisions

Note: An open Subsidized Guardianship case for a child is needed before continued eligibility and related notices and decisions can be documented.

Note: Primary Assignment to the case is needed in order to receive Subsidized Guardianship Ticklers.

Introduction

After a Subsidized Guardianship is established for a child, primary worker case assignment is necessary to comply with continued program eligibility determination(s) as outlined in policy.

This guide addresses:

- Annual Review Notification Process
- Subsidized Guardianship Eligibility Suspensions & Terminations
- Making a Subsidized Guardianship Determination as Made in Error
- Other Subsidized Guardianship Notices and Decisions
- Documenting Determination Types for a Child Over 18 and Child Over 19
- Printing from the AA/SG Eligibility Notices and Decisions Utility

About Subsidized Guardianship Related Notices & Decisions

Subsidized Guardianship documents for continued eligibility generally fall into the following types: documents requesting information from the guardian(s), documents notifying the guardian(s) of a potential or impending impact on program eligibility, and documents notifying the guardian(s) of a decision or event that has impacted eligibility.

These documents are created by eWiSACWIS overnight processing that generates the document and related tickler for the primary assigned worker, or by manually inserting and printing a document from Notices and Decisions Template History tab of the child's Subsidized Guardianship Eligibility record.

Documents can be printed from the Notices and Decisions Template History tab of the child's Subsidized Guardianship Eligibility or via the AA/SG Eligibility Notices and Decisions on the Utilities menu.

Related Quick Reference Guides:

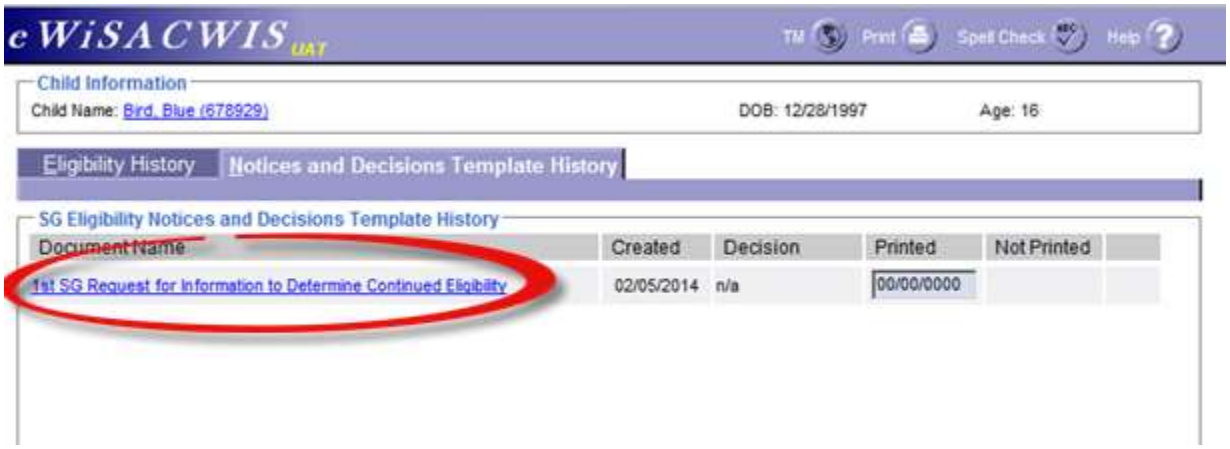
Reopening a Subsidized Guardianship Agreement Ended in Error
Subsidized Guardianship Amended Agreement
Subsidized Guardianship Initial Determination & Case Creation
Tickler Creation and Removal Information

Annual Review Notification Process

The annual review date begins one year after the hearing date that granted Subsidized Guardianship. A tickler is generated to indicate when a Subsidized Guardianship Request for Information to Determine Continued Eligibility needs to be sent to the guardian(s).

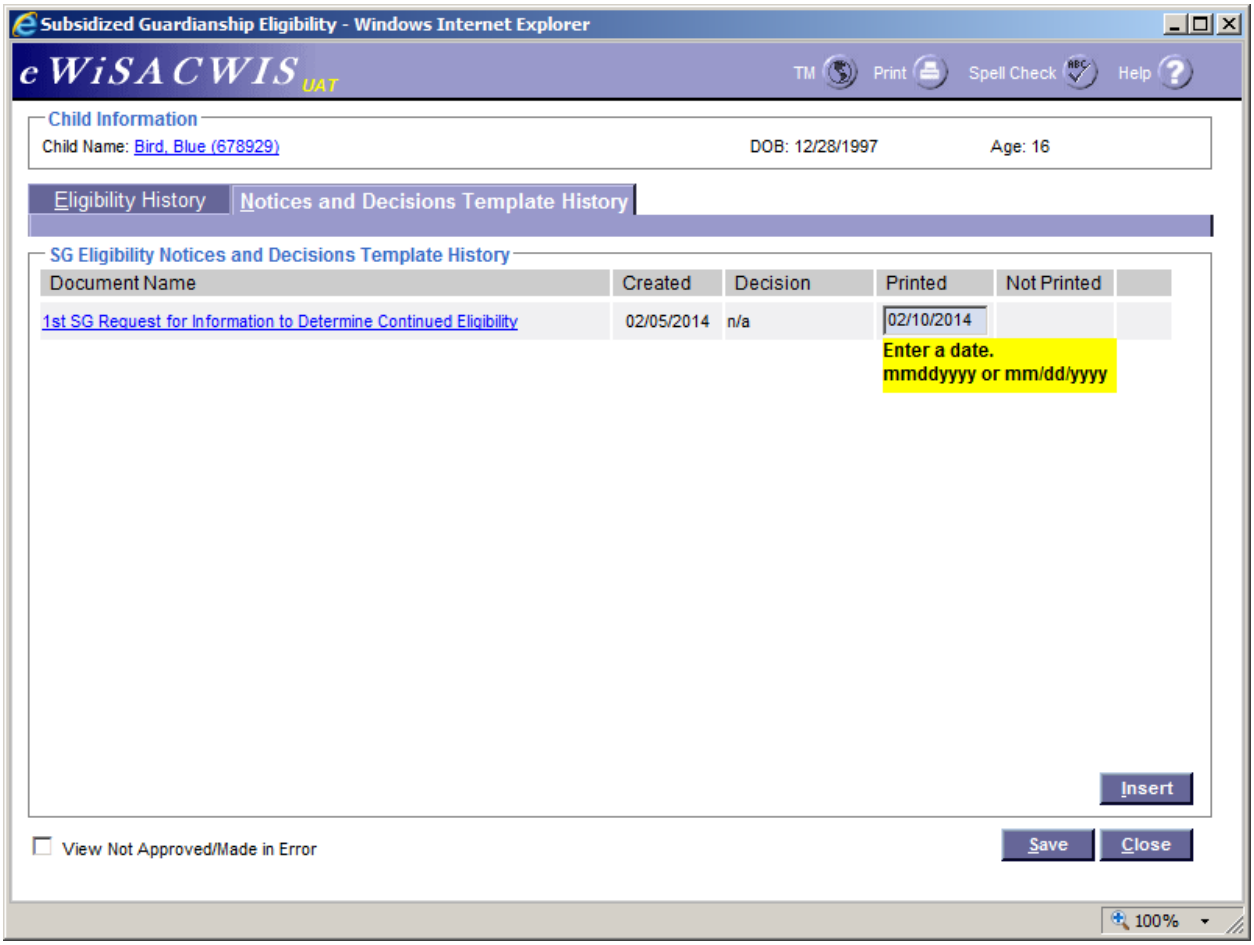
1. The primary assigned worker will receive a Tickler to send a 1st Subsidized Guardianship Request for Information to Determine Continued Eligibility 60 days prior to the Annual Review date. If the Annual Review information has not been entered, a second Tickler for a 2nd Subsidized Guardianship Request for Information to Determine Continued Eligibility will be generated 30 days prior to the Annual Review due date. Click the hyperlink directly from the desktop under the Ticklers section to access the child's Subsidized Guardianship Eligibility page.

2. On the Subsidized Guardianship Eligibility page, select the Notices and Decisions Template History tab. Click the hyperlink in the Document Name column to launch the template.



3. Information for the SG case prefills into the template. Print the template and click Save and Return to eWiSACWIS.

4. Enter the date printed in the Printed field and click Save.



Note: Subsidized Guardianship documents can also be created by inserting a new row, selecting the appropriate template from the drop-down in the Document Name field, and clicking Save. Once the page is saved, a hyperlink is created. Click the hyperlink to launch and print the document.

Note: Subsidized Guardianship documents can also be printed from the AA/SG Eligibility Notices and Decisions page launched from the Utilities menu.

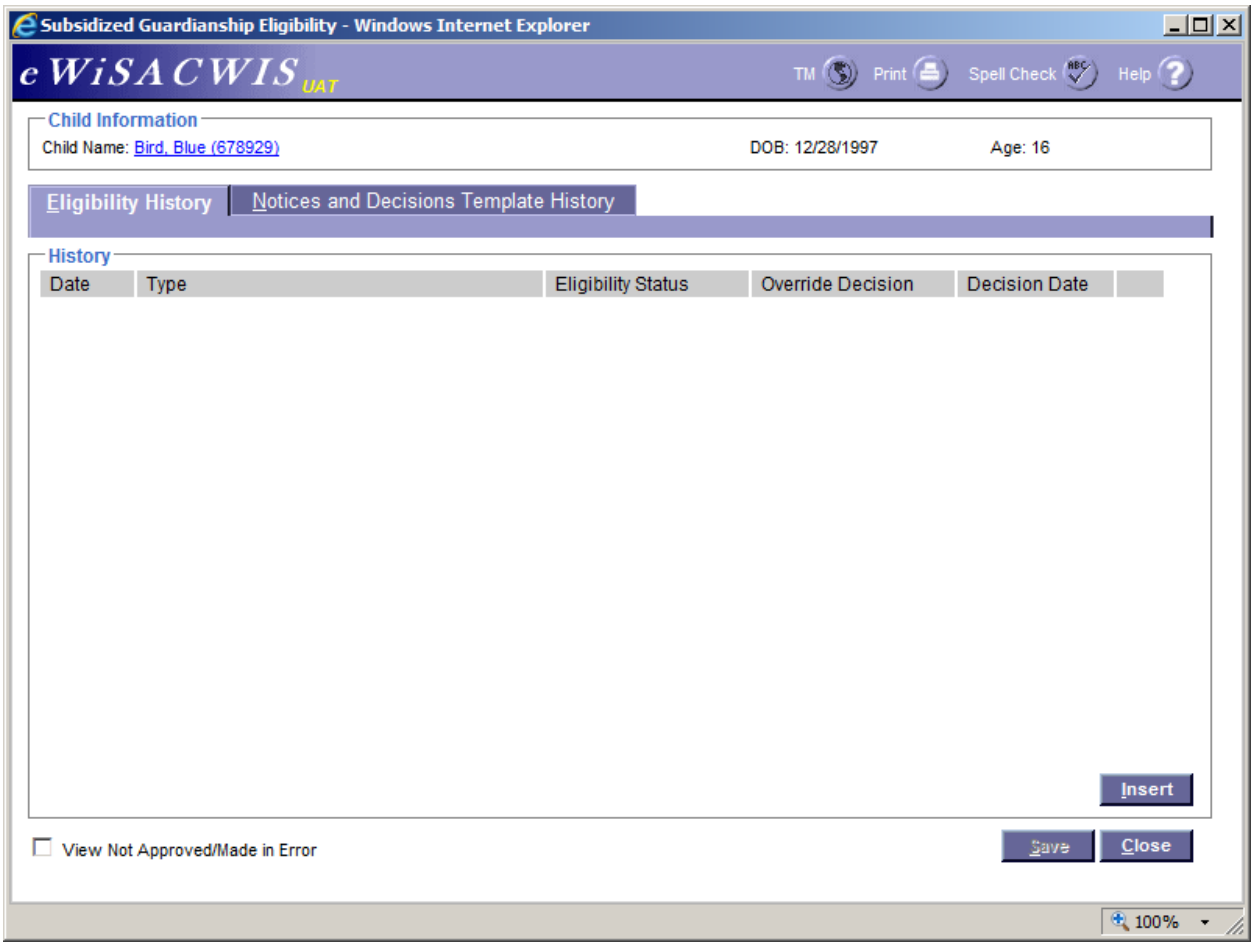
Documenting an Annual Review Determination or a Change in Circumstance(s)

Note: Annual Reviews should be entered **no more than 60 days prior** to the Annual Review due date. Those entered more than 60 days prior will not be recognized and payment will be suspended.

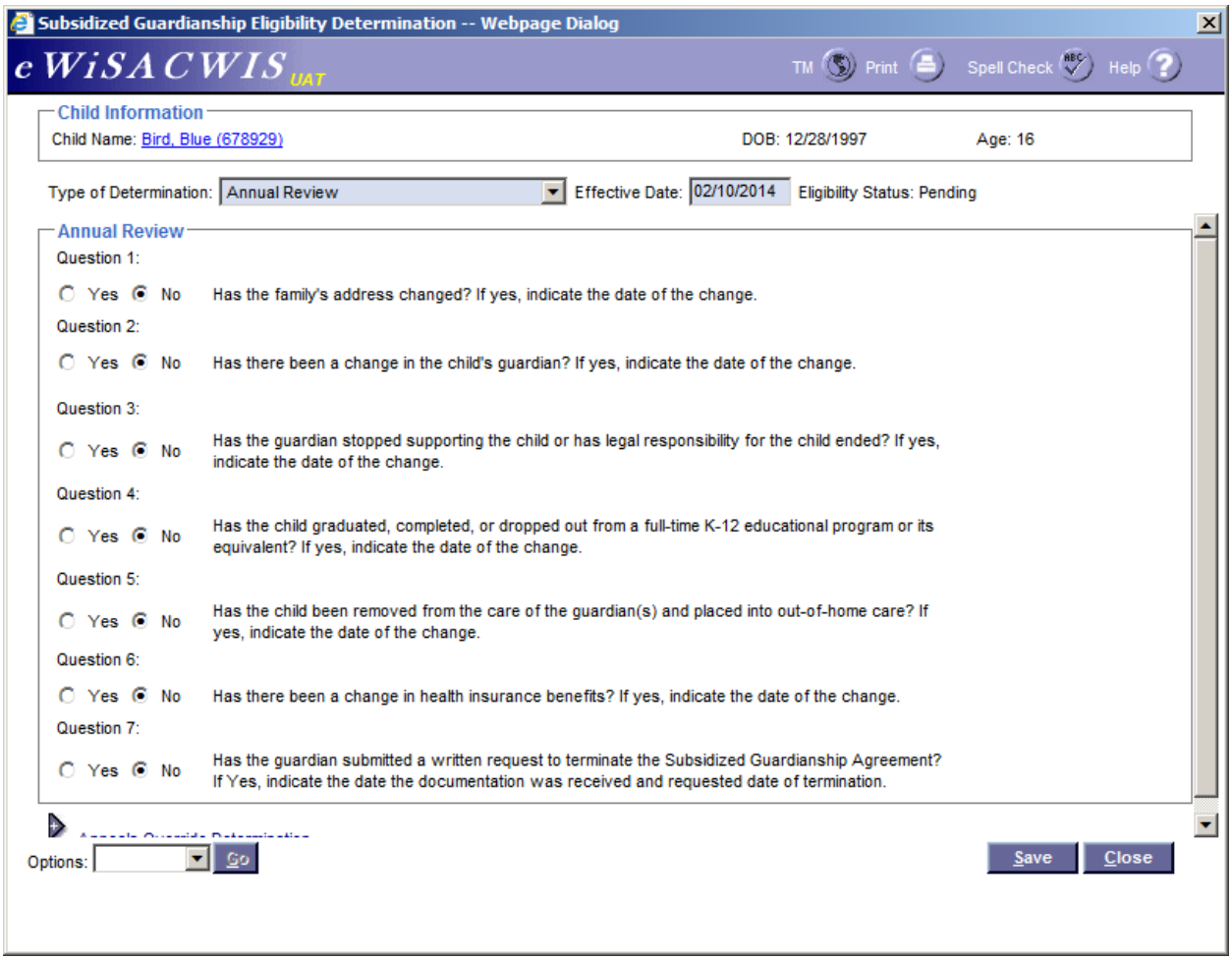
Note: A Change in Circumstance can be entered at any time and does not generate a tickler.

1. To enter returned documentation for an Annual Review, click on the associated tickler hyperlink or the Subsidized Guardianship Eligibility hyperlink from the outliner. This opens the child's Subsidized Guardianship Eligibility page.

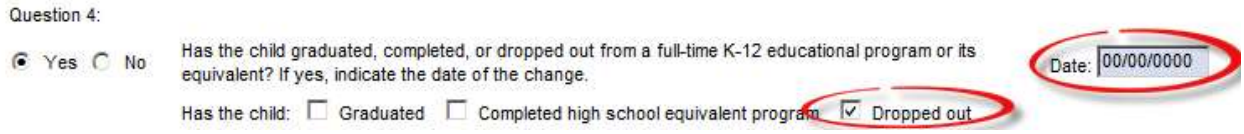
2. Click Insert on the Eligibility History tab to open a new Subsidized Guardianship Eligibility Determination page.



3. Select Annual Review [or Change in Circumstance(s)] from the Type of Determination drop-down. Enter a date in the Effective Date field.



4. Make the appropriate Yes or No selection for each question. When a question is answered Yes, a Date field will be displayed beside that question and is required. Depending on the question, additional information may be required.

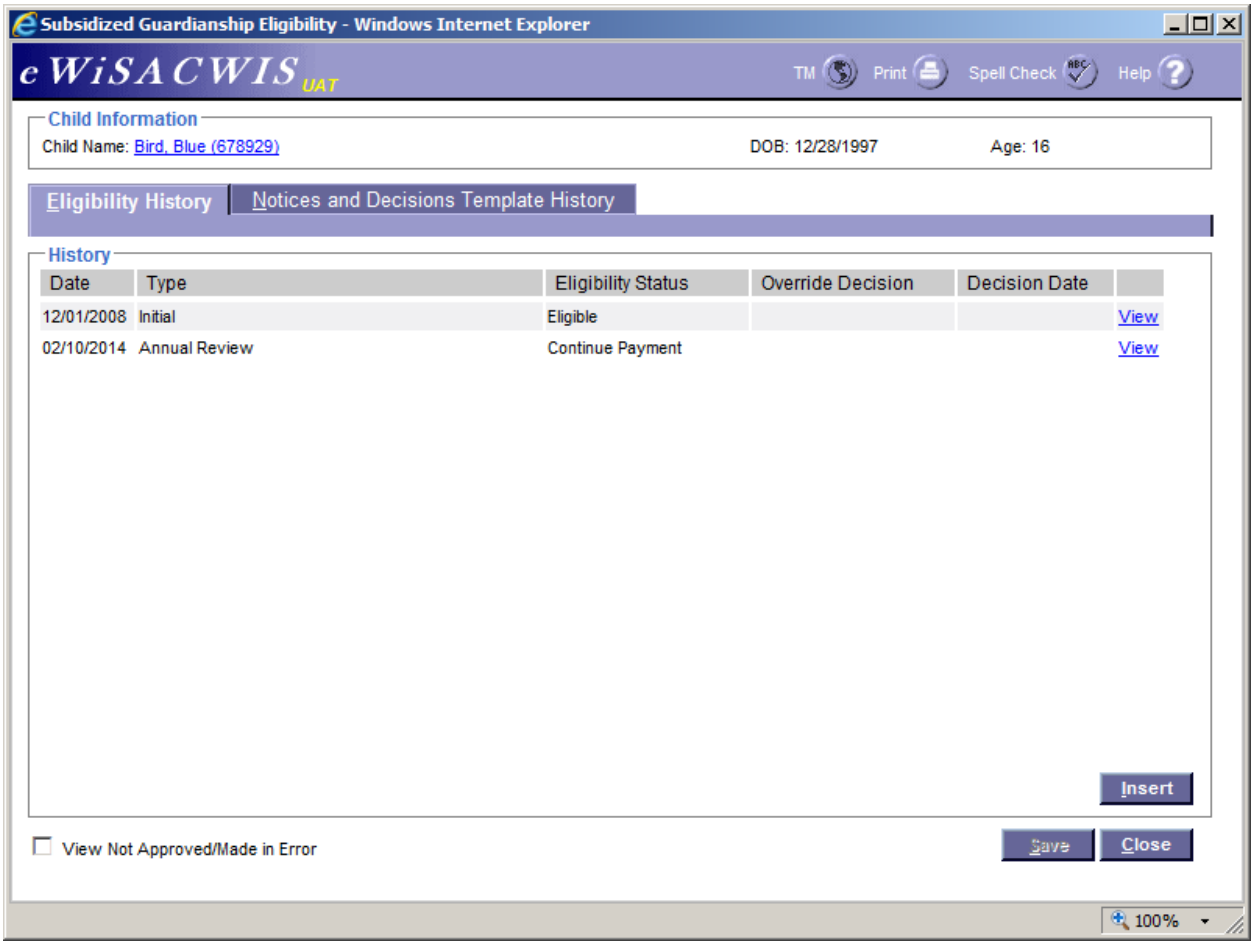


5. Once all of the questions have been answered, click the Save. The Eligibility Status will be updated to 'Continue Payment', 'Suspend Payment', or 'Terminate.'

   Note: If the Eligibility Status is 'Suspend Payment' or 'Terminate' see the Subsidized Guardianship Suspensions and Terminations sections of this guide for more information.

6. The determination can now be approved. Select Approval from the Options drop-down and click Go. On the Approval History page, select the Approve radio button. Click Continue to return to the Subsidized Guardianship Eligibility Determination page. Click Save to send the determination for approval.

7. Click Close to return to the Subsidized Guardianship Eligibility page.



8. Click Close to return to the desktop.

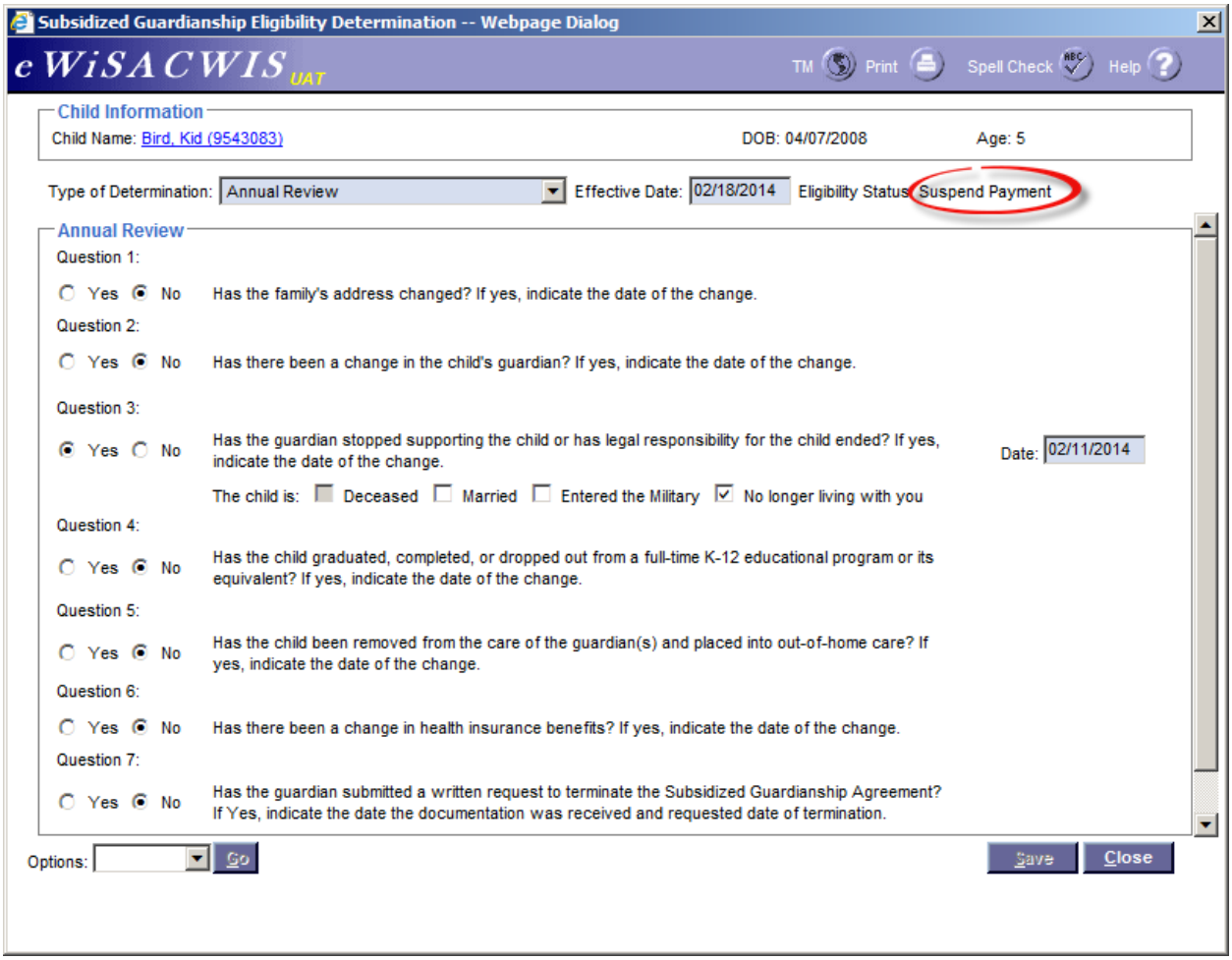
Subsidized Guardianship Eligibility Suspensions

There are two ways Subsidized Guardianship Eligibility can be suspended:

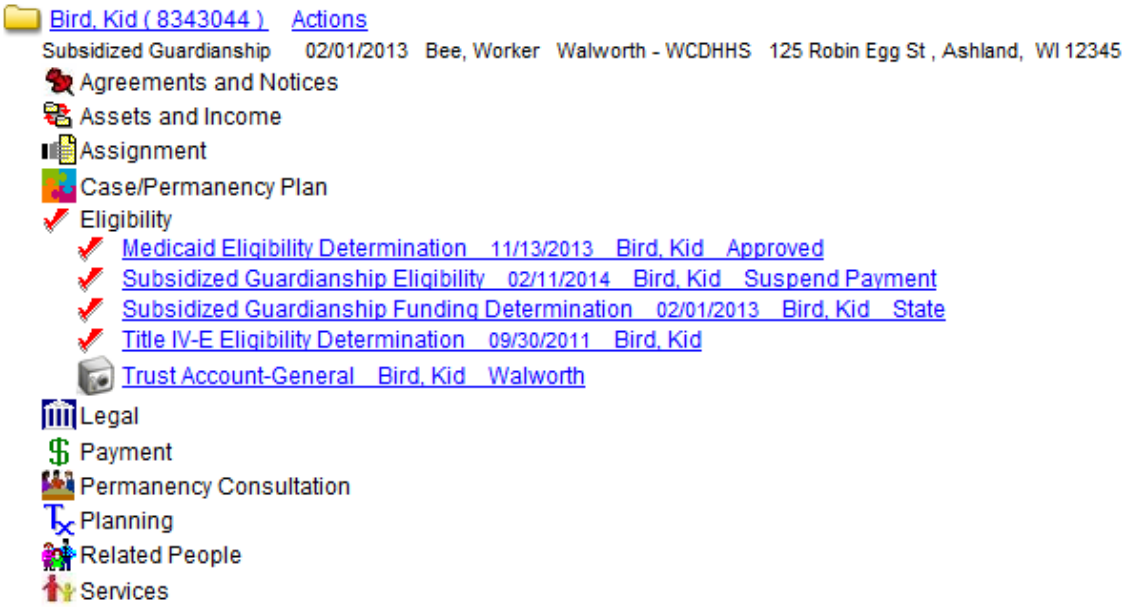
- If the determination of the Eligibility Status is 'Suspend Payment' based on responses entered on an approved Annual Review or Change in Circumstances

  OR

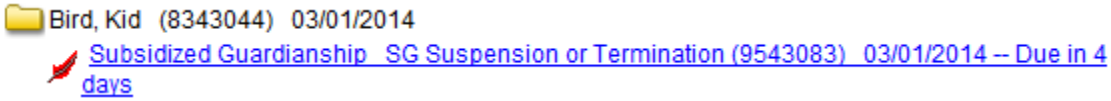
- If an annual review was not completed by the Annual Review due date and both 1st & 2nd Requests for Information to Determine Continued Eligibility have been generated and printed. Subsidized Eligibility is suspended by a weekly overnight process with a determination of 'Annual Review Not Returned.'



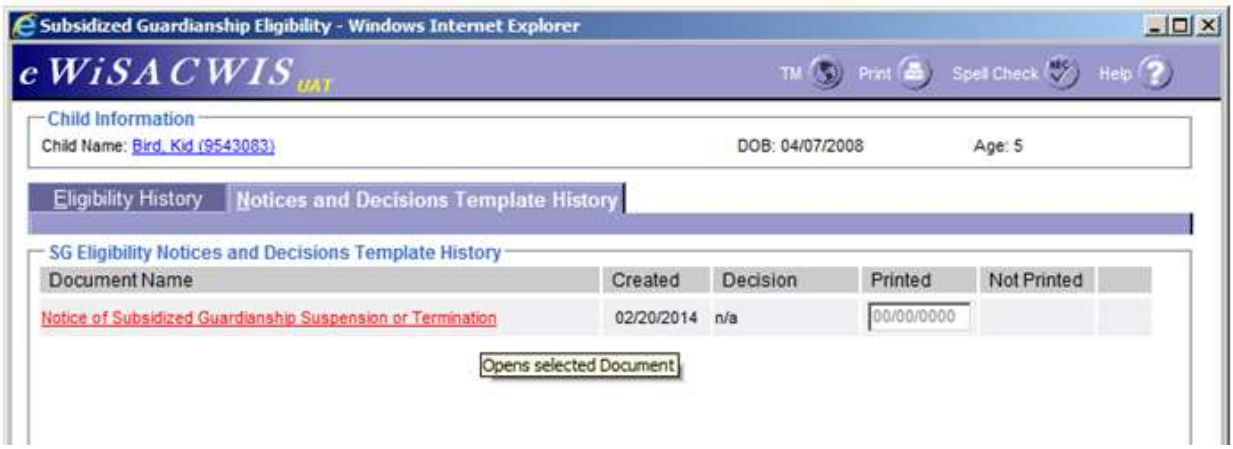
1. When 'Suspend Payment' is a determination entered by a worker, the outliner is immediately updated. However, tickler generation and payment are not affected until supervisory approval of the decision.



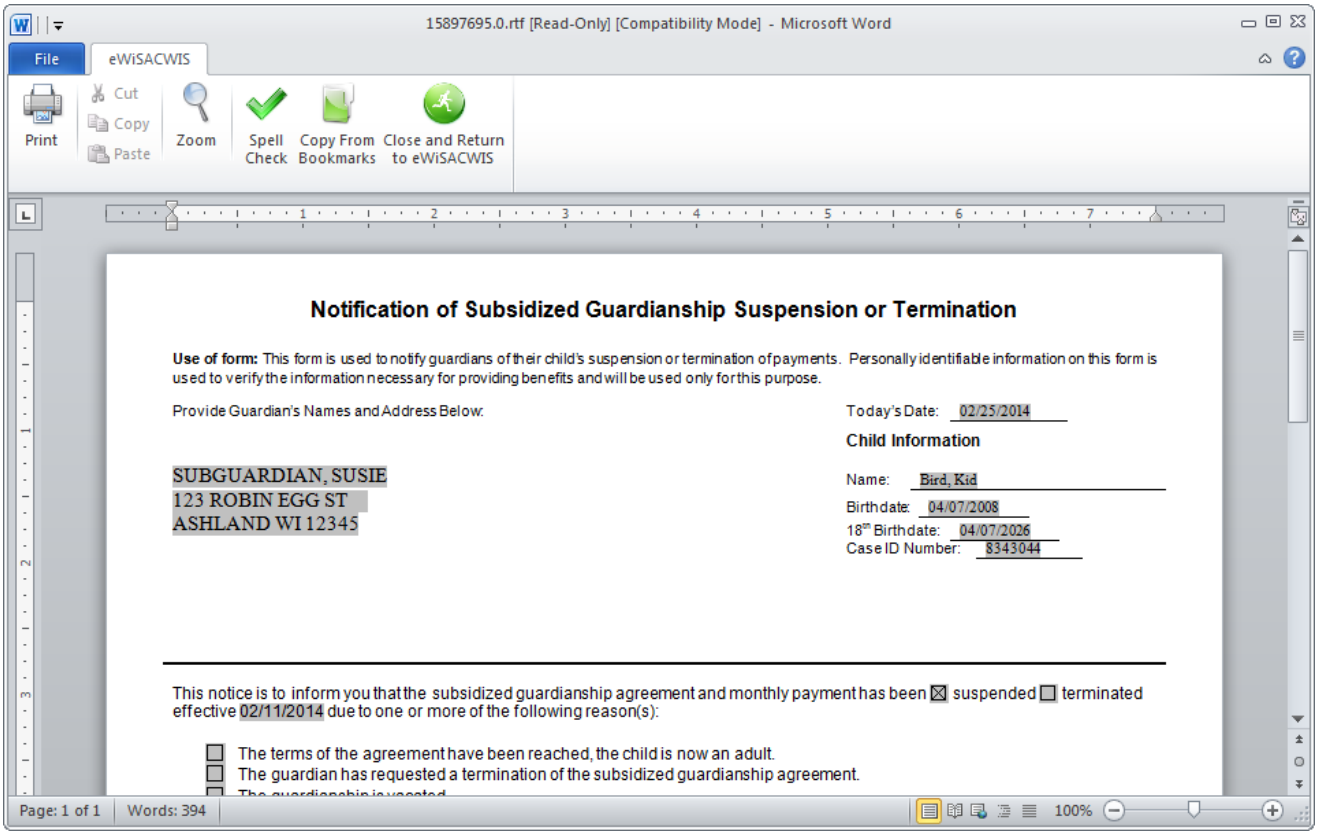
2. Overnight eWiSACWIS processing identifies Subsidized Guardianships with an approved Eligibility Status of 'Suspend Payment' and creates the following tickler for the primary assigned worker. To print the template, click the associated tickler hyperlink to access the child's Subsidized Guardianship Eligibility page.



3. From the Notices and Decisions Template History tab, click the document hyperlink to open the template.

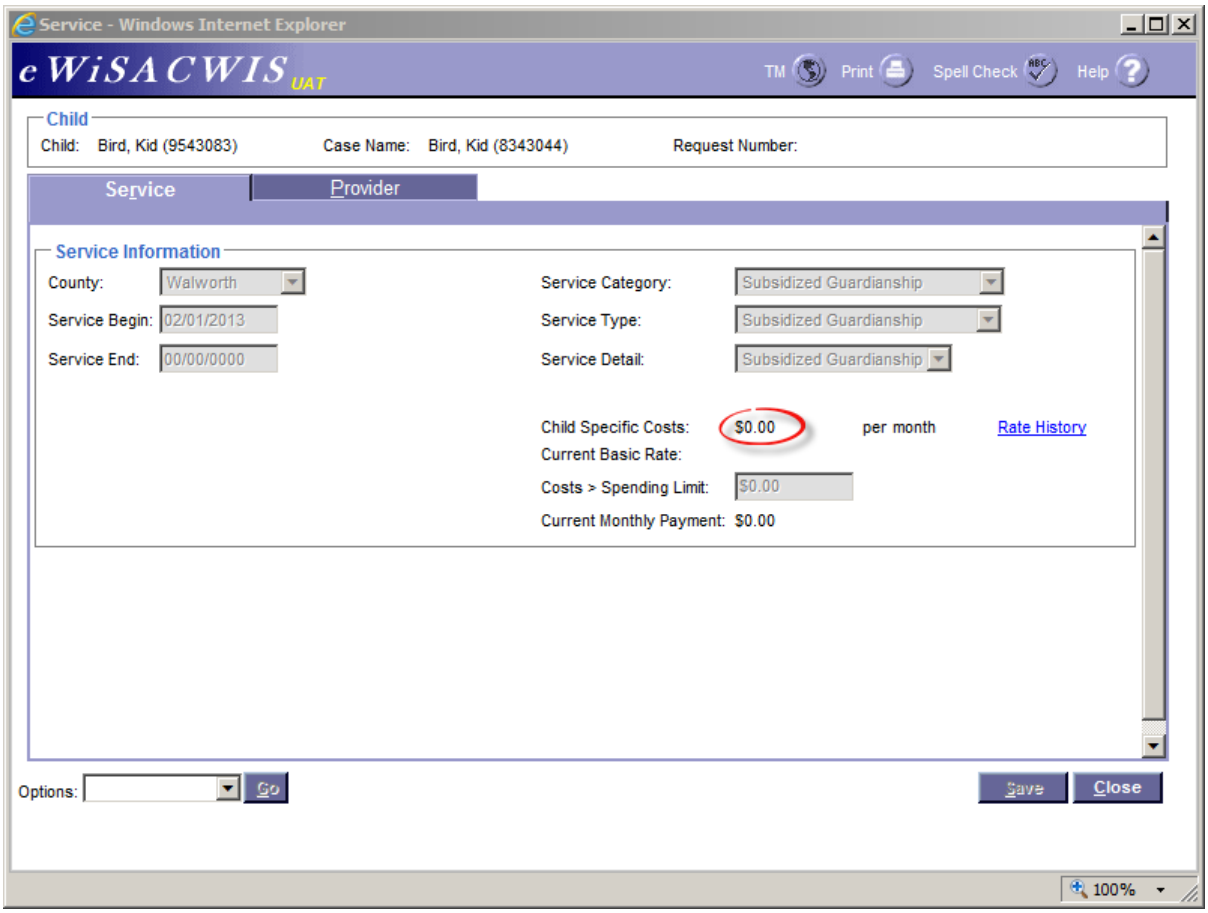


4. The template prefills guardian, child, and suspension information. Print the template and click Close & Return to eWiSACWIS to return to the Subsidized Guardianship Eligibility page.



5. On the Notices and Decisions Template History tab, the Date Printed will default to today's date. Verify the date and click Save. Saving the printed template will delete the associated tickler.

6. Weekly financial overnight processing identifies Subsidized Guardianships with approved eligibility statuses of 'Suspend Payment' and sets the rate to $0.00.



7. The Subsidized Guardianship Agreement and service remain open. If appropriate information is returned and recorded (e.g. Annual Review, Change in Circumstances) and the determination is 'Continue Payment', payments will resume based on the Effective Date of the new determination.

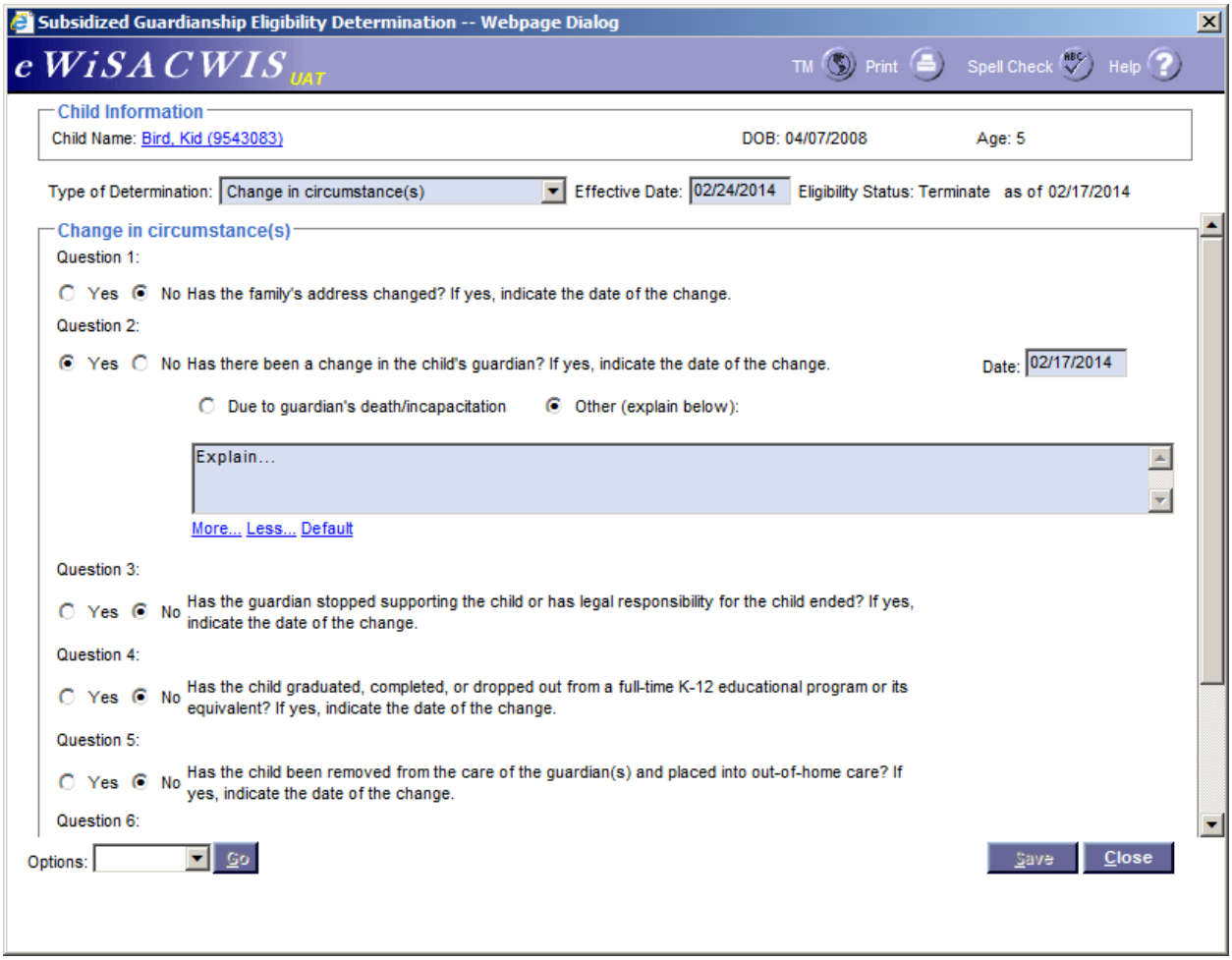
Subsidized Guardianship Eligibility Terminations

There are two ways Subsidized Guardianship Eligibility can be terminated:

a) If the determination of the Eligibility Status is 'Terminate' based on responses entered on an approved Annual Review, Change in Circumstances, Child Over 18, or Child Over 19

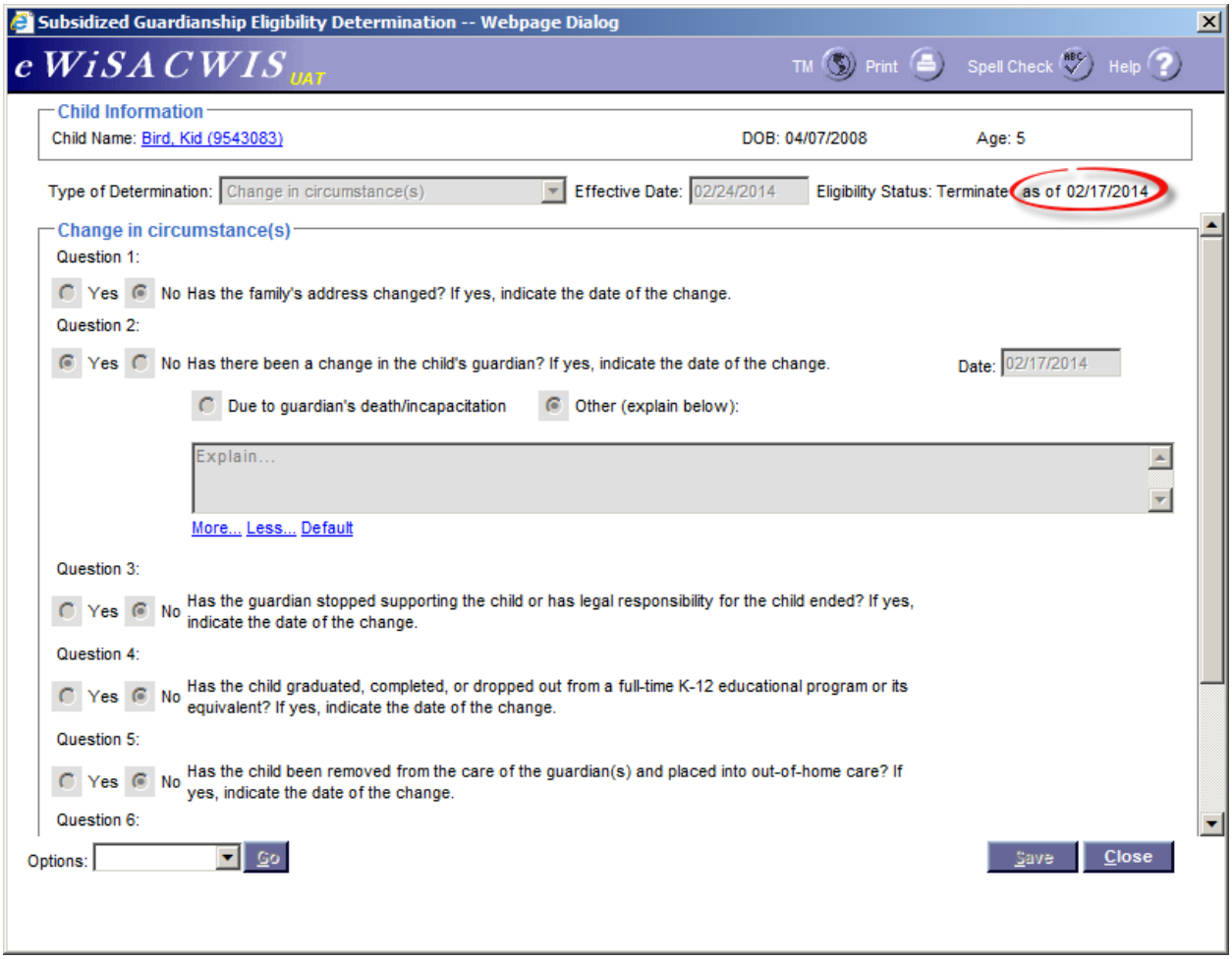
OR

b) If the determination of the Eligibility Status is 'Terminate' due to inserting a Type of Determination of 'Guardian Failed to Respond to Annual Review'.

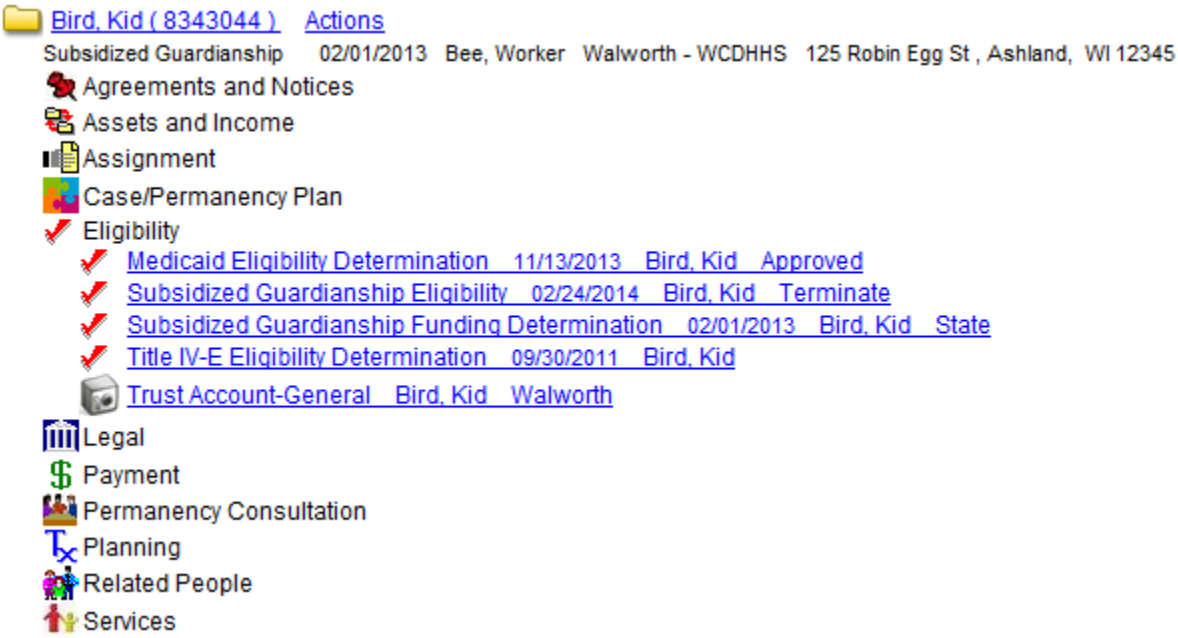


a) <u>Terminations resulting from Subsidized Guardianship Eligibility determination responses:</u>

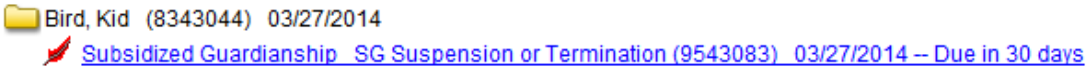
1. When an Eligibility Status determination is 'Terminate', an 'as of date [MM/DD/YYYY]' will appear directly after. The date is calculated by the earliest event that terminates the agreement recorded on the page.



2. When 'Terminate' is saved as the determination, the outliner is immediately updated. However, tickler generation and payment are not affected until supervisory approval of the decision.



3. Overnight eWiSACWIS processing identifies Subsidized Guardianships with an approved Eligibility Status of 'Terminate' and creates the following tickler for the primary assigned worker. To print the associated template, click the tickler hyperlink to access the child's Subsidized Guardianship Eligibility page.



Continue to Printing the Notice of Subsidized Guardianship Suspension or Termination of this section.

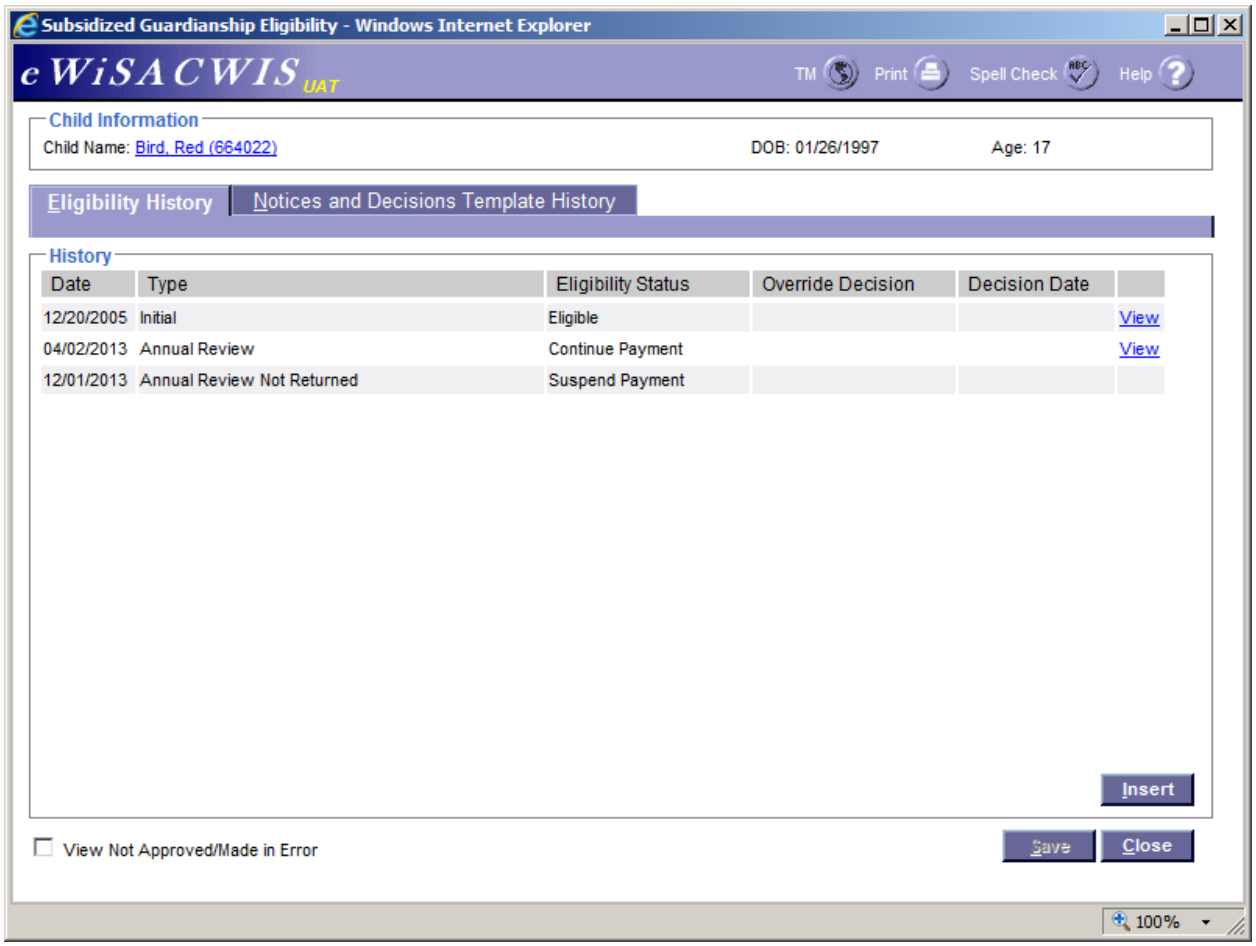
b) Terminations resulting from a Subsidized Guardianship Eligibility Determination type of Guardian Failed to Respond to Annual Review

Note: In order for this option to be available on the Determination Type drop-down, the Subsidized Eligibility must first be suspended by a weekly overnight process with a determination of 'Annual Review Not Returned'.

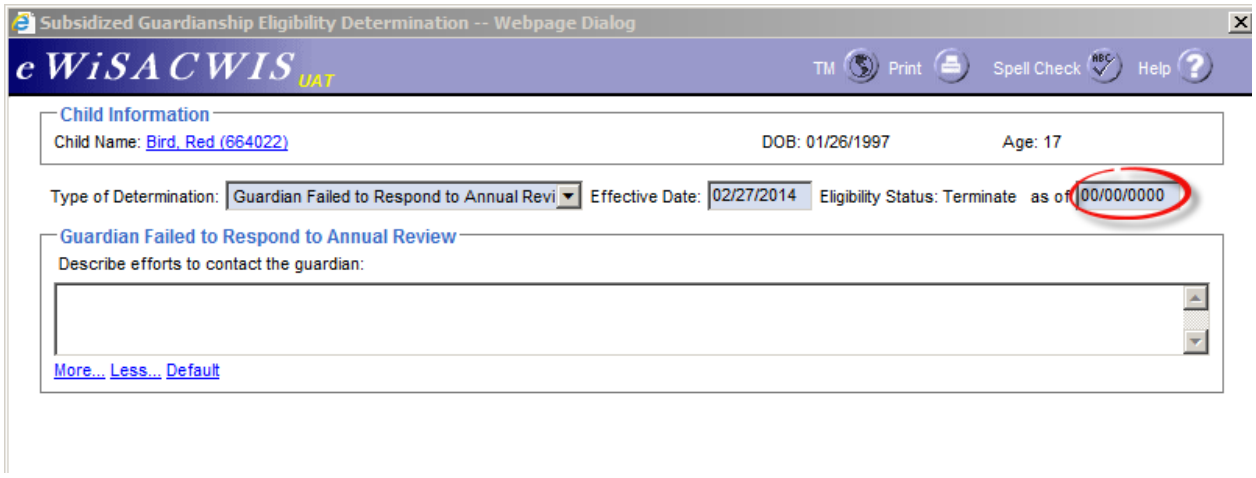
The Guardian Failed to Respond to Annual Review Eligibility Determination type allows for a county to terminate an agreement at a date of their choosing.

1. Click the Subsidized Guardinanship Eligibility hyperlink from the case outliner to open the child's Subsdized Guardianship Eligibility page.

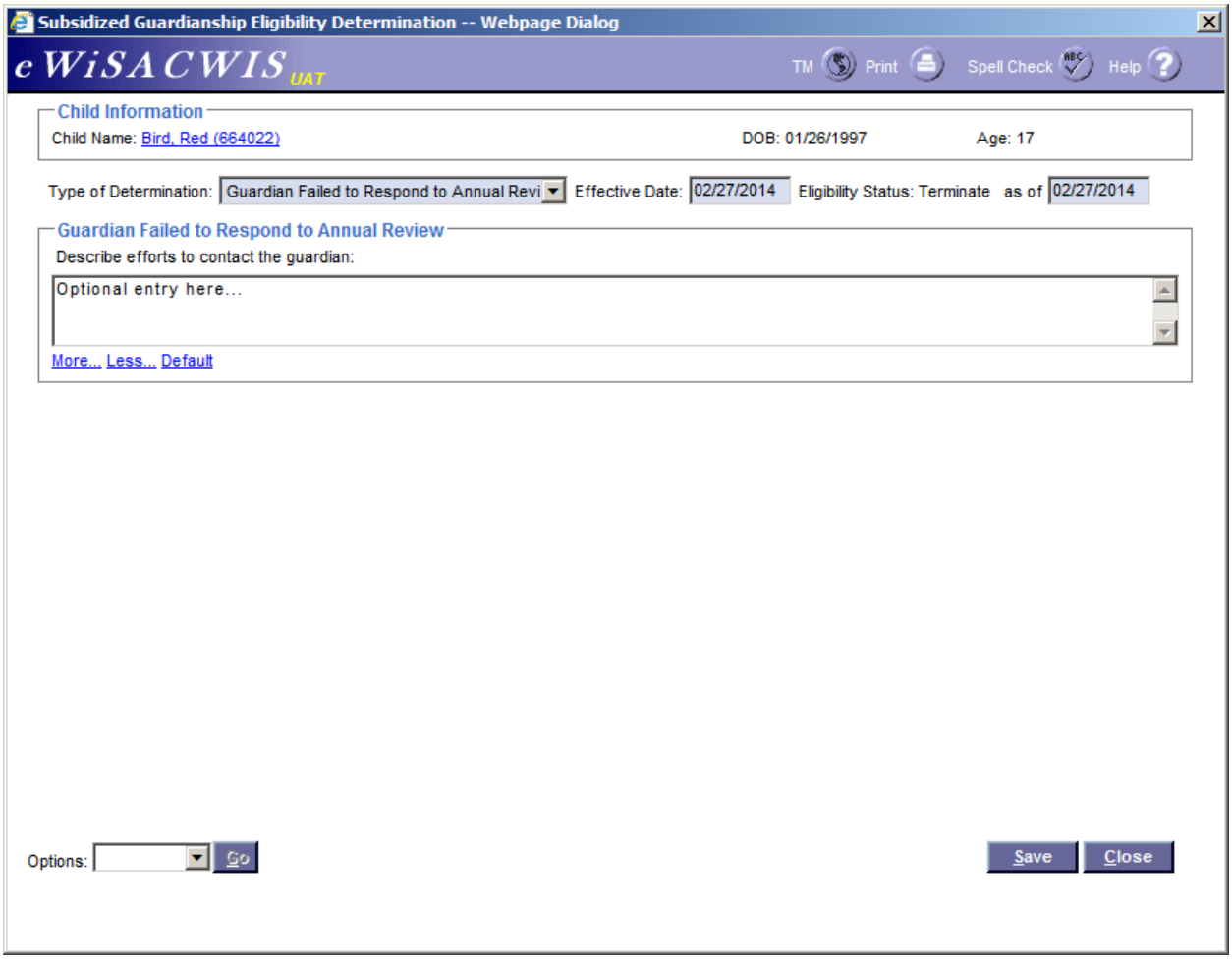
2. On the Subsidized Guardianship Eligibility page, verify the most recent Eligibility Status type is Annual Review Not Returned. Click Insert.



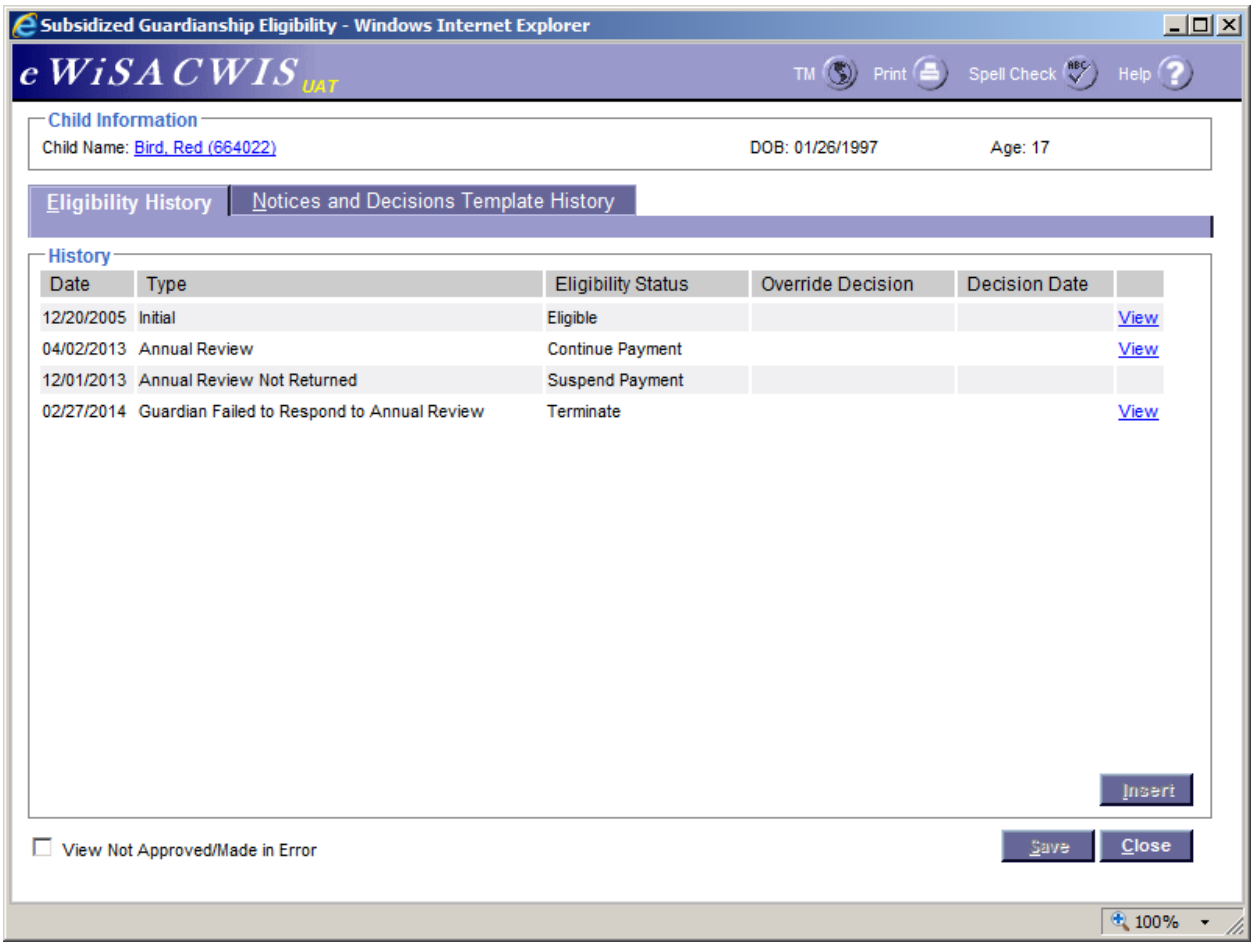
3. On the Subsidized Guardianship Eligibility Determination page, select Guardian Failed to Respond to Annual Review for the Type of Determination. The Effective Date will default to the date of entry. Enter a date for the Terminate as of. This cannot be a future date.



4. Enter any desired text into the 'Describe efforts to contact the guardian' narrative box. When finished click Save and send for supervisory approval. Click Close to return to the Subsidized Guardianship Eligibility Screen.



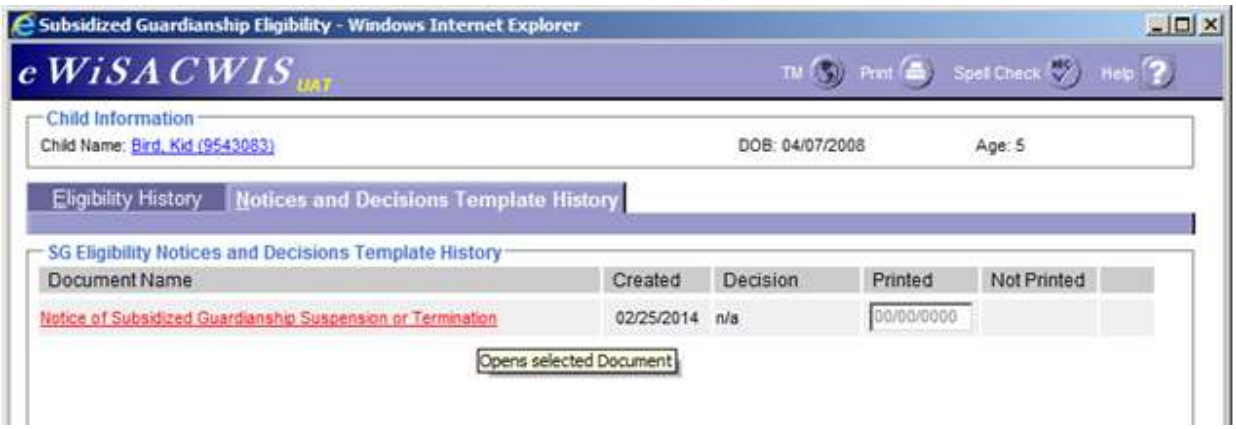
5. The Guardian Failed to Respond to Annual Review will display for Type, with the Eligibility status as Terminate. Click Close.



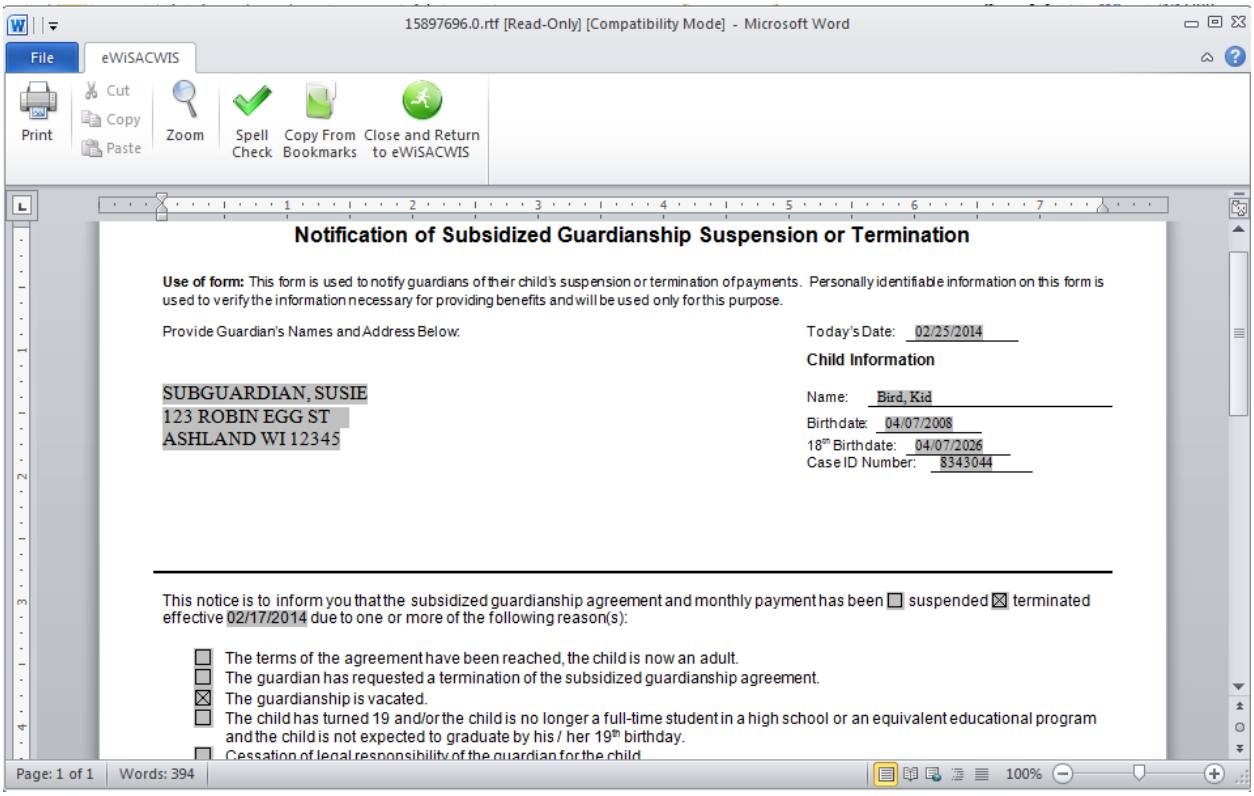
6. Weekly financial overnight processing identifies Subsidized Guardianships with an approved eligibility status of 'Terminate' and looks to the 'as of date:' If the 'as of date' has been reached, the Subsidized Guardianship Agreement and service will be closed.

Printing the Notice of Subsidized Guardianship Suspension or Termination

1. From the Notices and Decisions Template History tab, click the document hyperlink to open the template.



2. The template prefills guardian, child, and termination information. Print the template and click Close & Return to eWiSACWIS to return to the Subsidized Guardianship Eligibility page.



3. On the Notices and Decisions Template History tab, the Date Printed will default to today's date. Verify the date and click Save. Saving the printed template will delete the associated tickler.

4. Weekly financial overnight processing identifies Subsidized Guardianships with an approved eligibility status of 'Terminate' and looks to the 'as of date:' If the 'as of date' has been reached, the Subsidized Guardianship Agreement and service will be closed.

Note: If an Eligibility Status of 'Terminate' was entered in error, and weekly financial processing has **NOT** occurred, the determination can be 'Made in Error' and, if applicable, a new eligibility status entered.

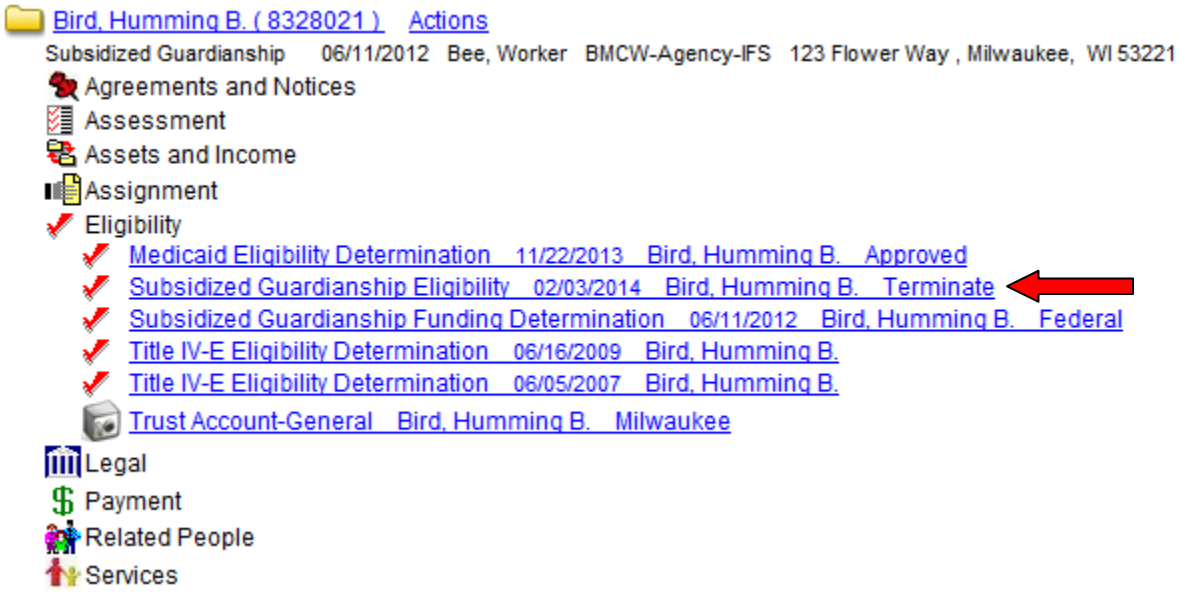
Note: If an Eligibility Status of 'Terminate' was entered in error, and weekly financial processing **HAS** occurred, see the Reopening a Subsidized Guardianship Agreement Ended in Error quick reference guide.

Making a Subsidized Eligibility Determination as Made in Error

Note: This section addresses when an Eligibility Status was entered in error, and, if the determination affects payment, that the weekly financial processing has **NOT** occurred.

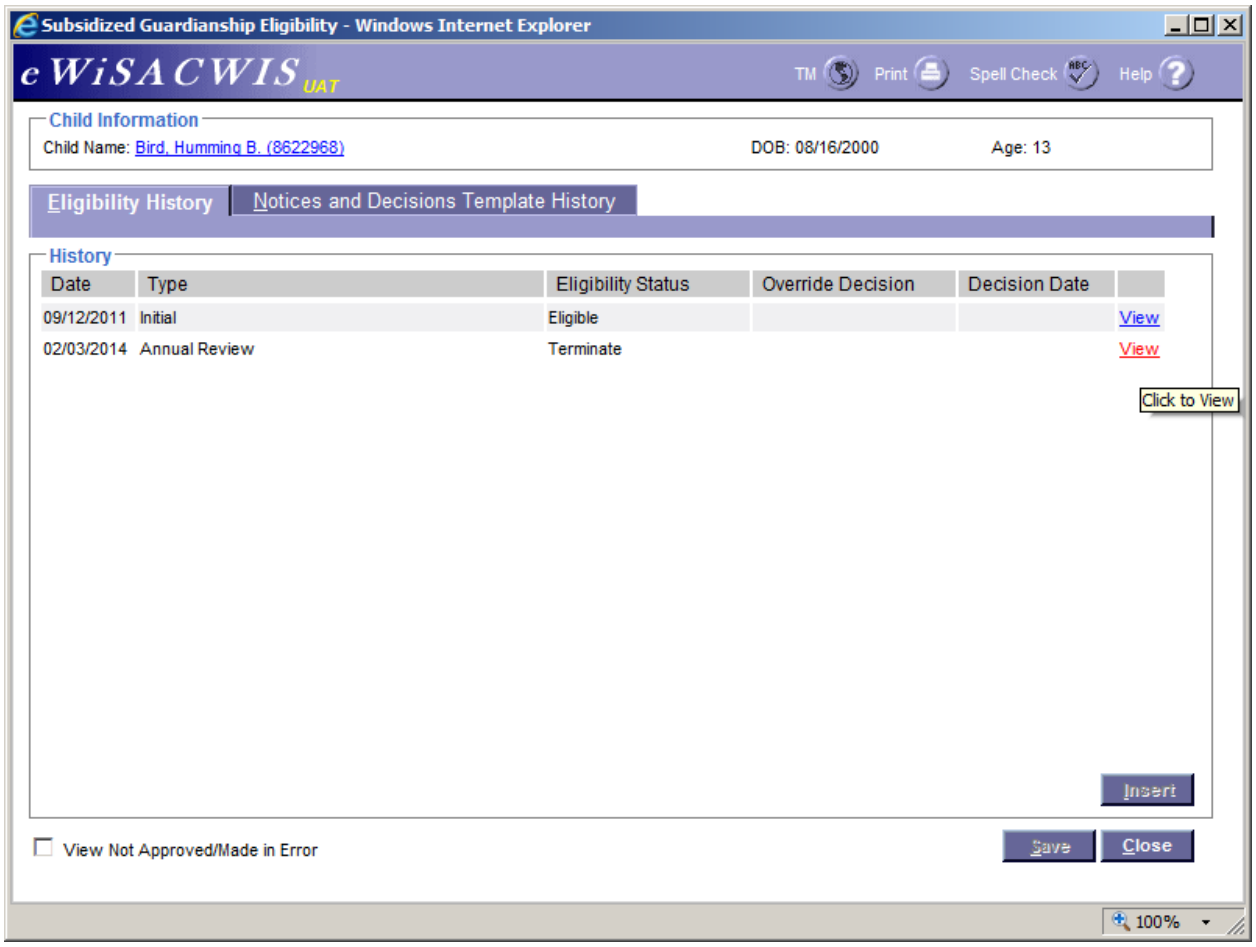
Note: If an Eligibility Status of 'Terminate' was entered in error and weekly financial processing **HAS** occurred, see the Reopening a Subsidized Guardianship Agreement Ended in Error quick reference guide.

1. To make the SG Eligibility as 'Made in Error' click the child's Subsidized Guardianship Eligibility hyperlink from the outliner.

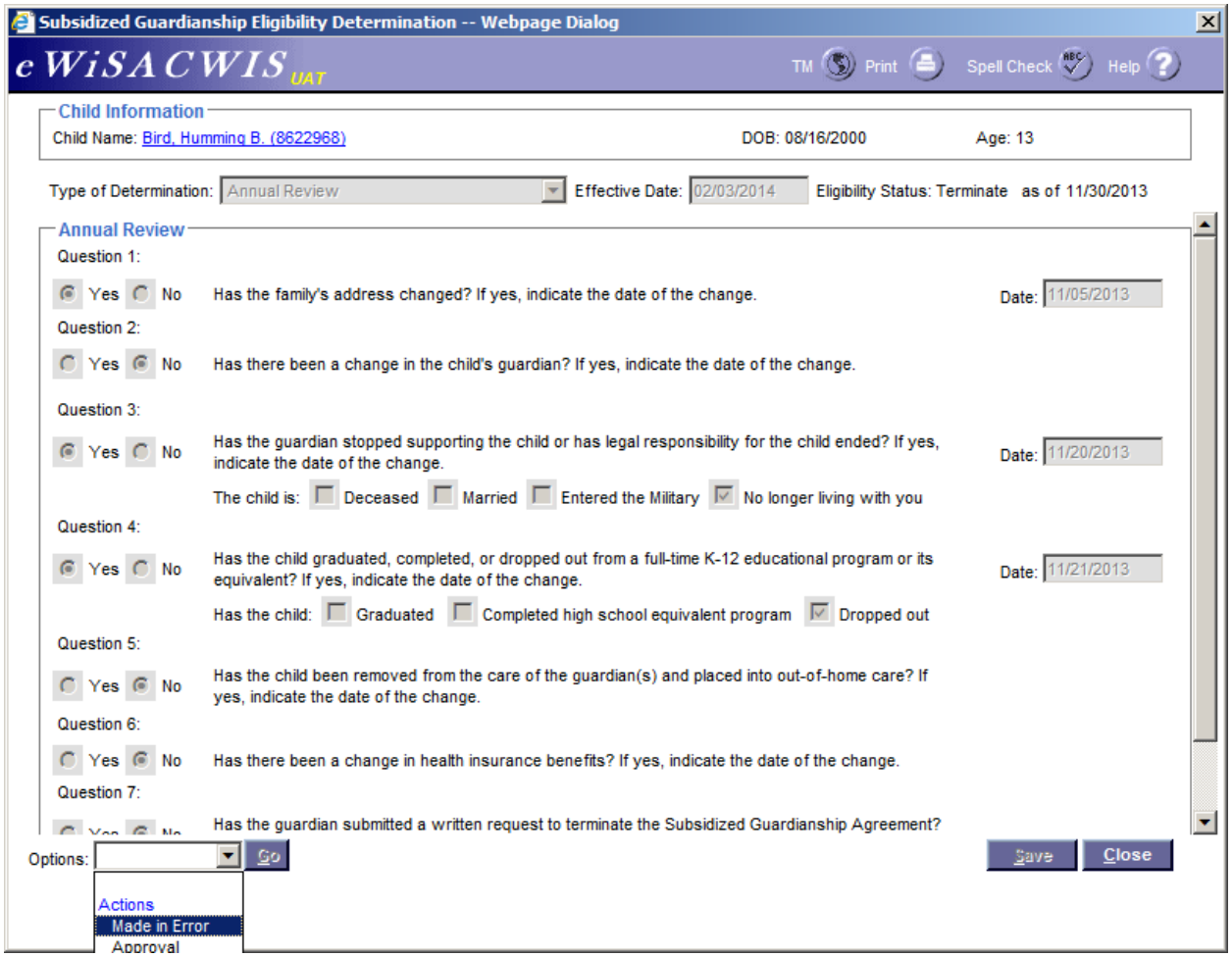


Note: The only Eligibility Statuses that cannot be 'Made in Error' are: Annual Review Not Returned and Made in Error.

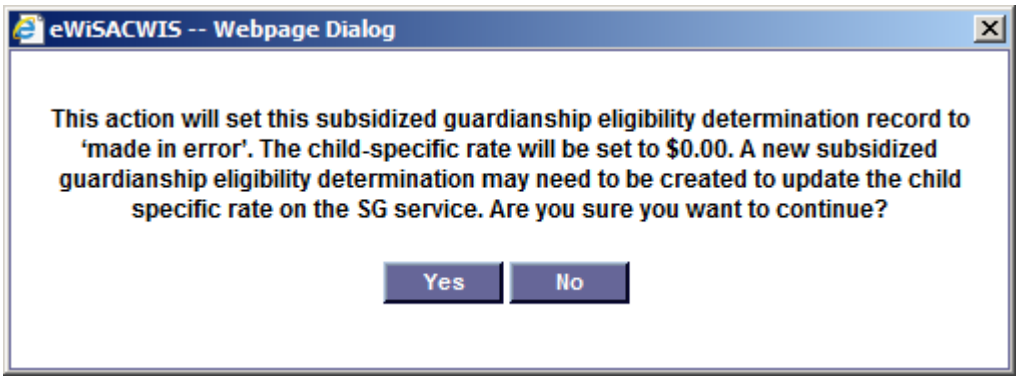
2. On the Subsidized Guardianship Eligibility, click View on the Eligibility Status line to make in error. This should be the most recent status. This opens the Subsidized Guardianship Eligibility Determination page.



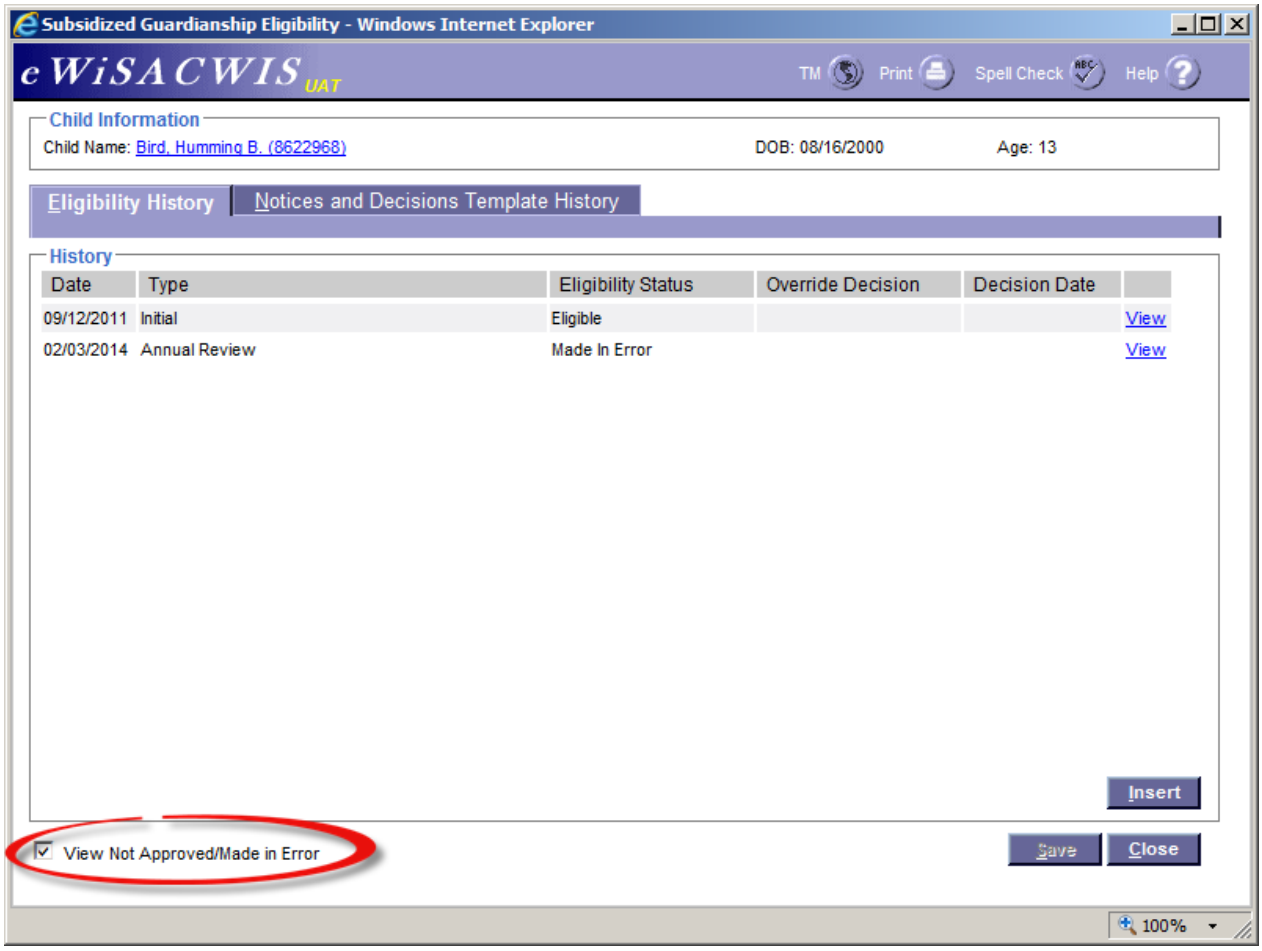
3. On the Subsidized Guardianship Eligibility Determination page, select 'Made in Error' from the Options drop-down and click Go. Click Close to return to the Subsidized Eligibility Determination page.



Note: When making a determination in error which is not 'Terminate,' the following message will display. Click Yes to continue, No to return the Subsidized Eligibility determination.



4. The Eligibility Status has been changed to Made in Error.



Note: To view the status that was Made in Error, select the View Not Approved/Made in Error checkbox.

Other Subsidized Guardianship Notices and Decisions

Several notices and related ticklers are generated for children based on the date of birth, education status, and other eligibility factors.

- Tickler: **Subsidized Guardianship Termination of SG at Age 18**- Identifies children with an open SG Service that are expected to turn 18 in 130 days. Reminds the primary worker to send:
    - Document: **Advance Notice of Termination of Subsidized Guardianship at Age 18** – This notice is used to collect high school information for the purpose of determining continued eligibility for Subsidized Guardianship after a child turns 18 years of age.

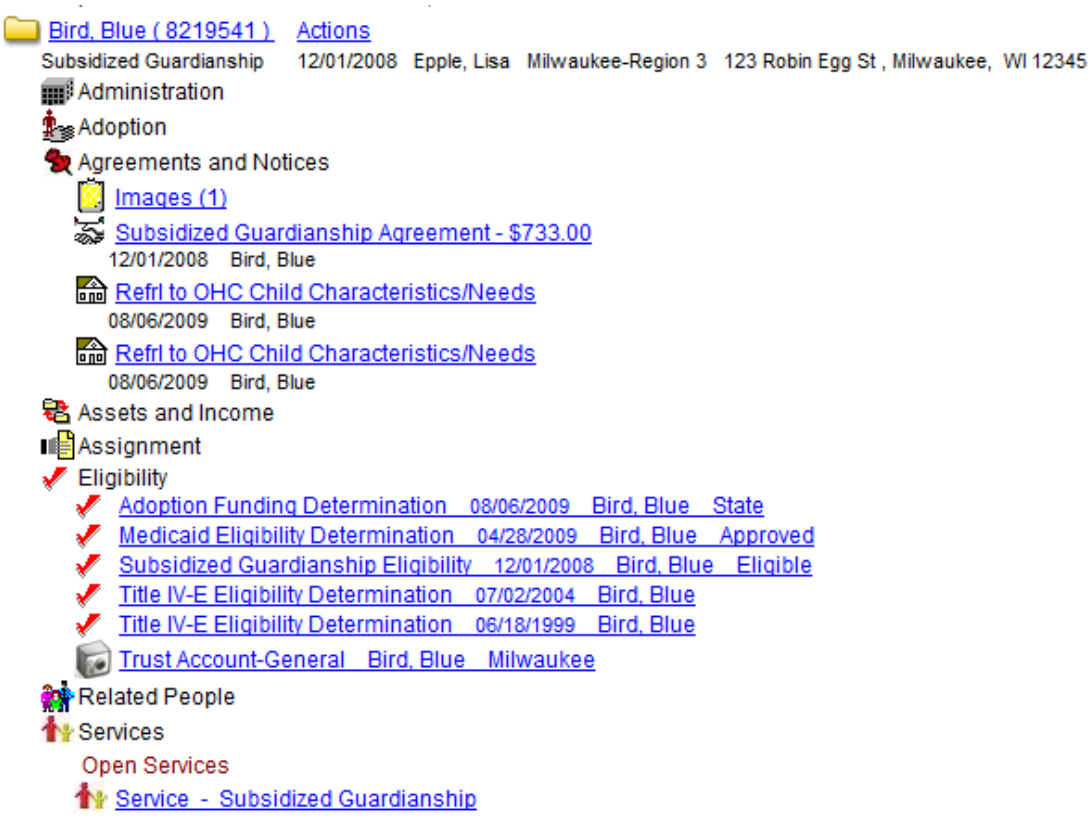
    - Document: **Notice of Decision on Subsidized Guardianship Eligibility Status After 18 -** Identifies children that are expected to turn 18 in 60 days by selecting the notice via the AA/SG Eligibility Notices and Decisions Utility. This form is used to notify guardians of their child's eligibility for Subsidized Guardianship after the child turns 18 years of age.

- Tickler: **Subsidized Guardianship Termination of SG at Age 19 -** Identifies children with an open SG service that are expected to turn 19 in 130 days and where the Anticipated High School Graduation date is blank or greater than the 19th birthday. Reminds the primary worker to send:
    - Document: **Request for Continuation of Subsidized Guardianship for a Child Over Age 19** – This notice is used to collect information for the purpose of determining continued eligibility for Subsidized Guardianship after a child turns 19 years of age.

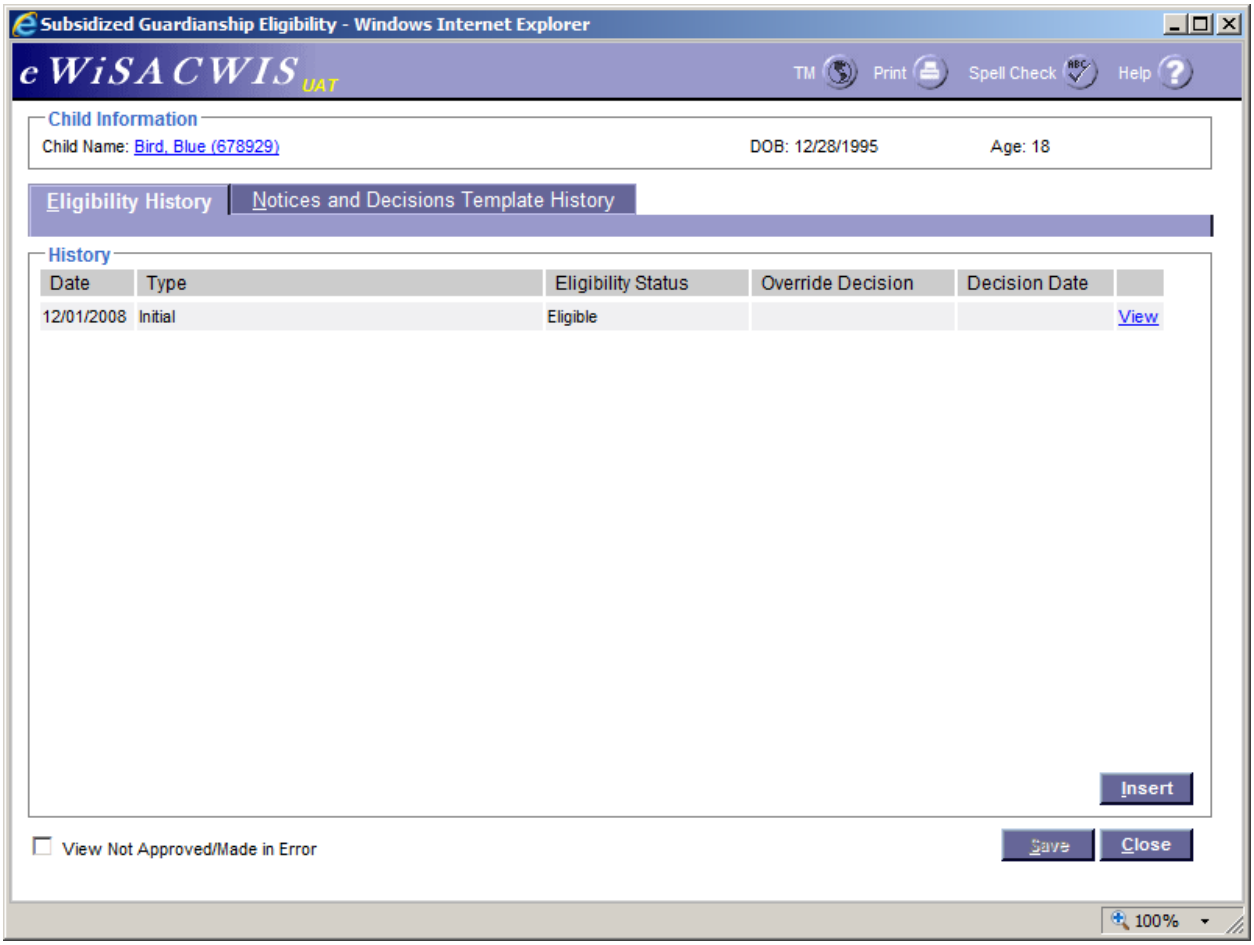
Note: Documents can be printed via the AA/SG Eligibility Notices and Decisions on the Utilities menu, however most can also be generated and printed from the Notices and Decisions Template History tab of the child's Subsidized Guardianship Eligibility.

Documenting Determination Types for a Child Over 18 & a Child Over 19

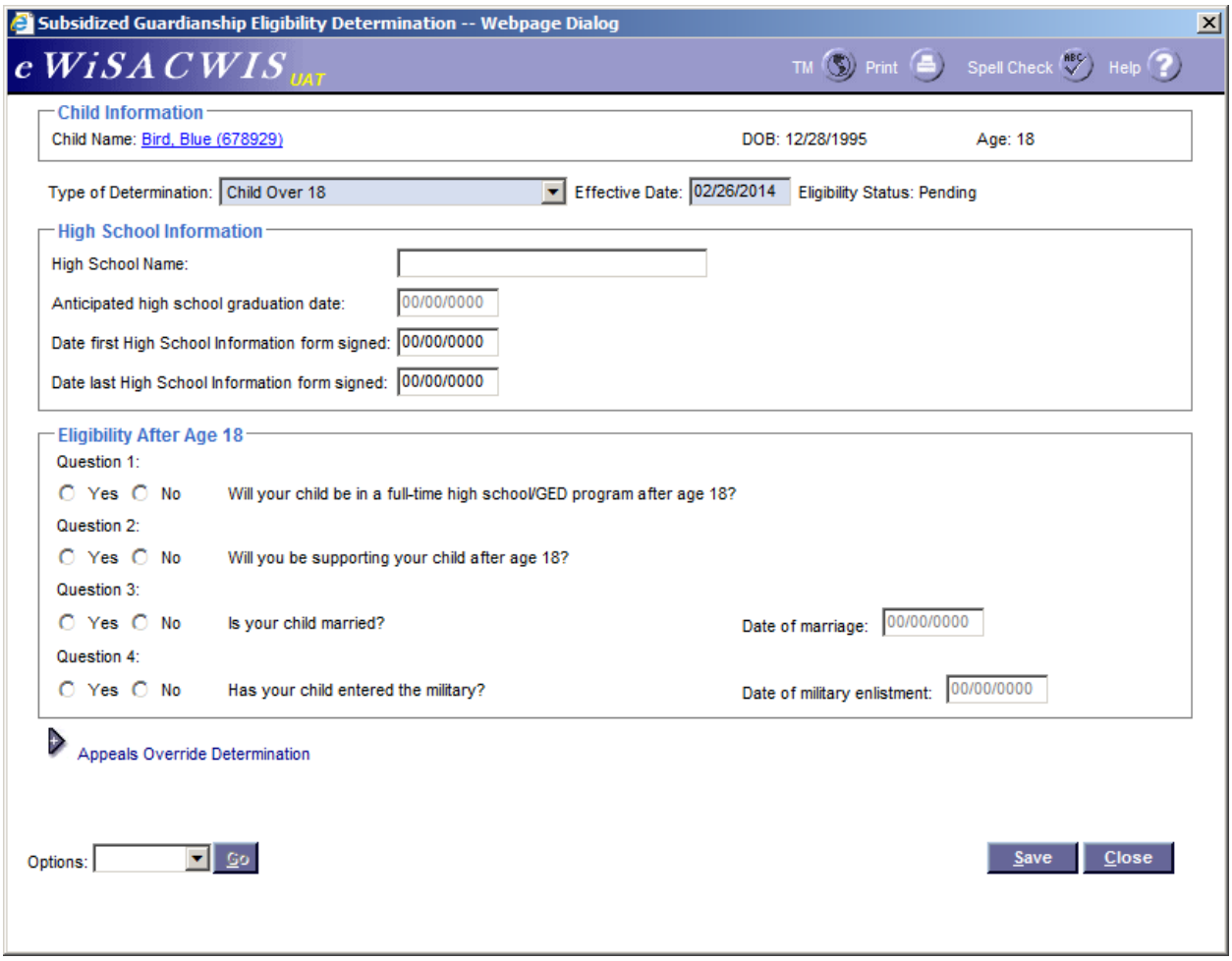
1. To document a determination for a Child Over 18 or Child Over 19, access the Subsidized Guardianship Eligibility page by clicking the child's Subsidized Guardianship Eligibility hyperlink from the outliner.



2. Click Insert on the Eligibility History tab to open a new Subsidized Guardianship Eligibility Determination page.

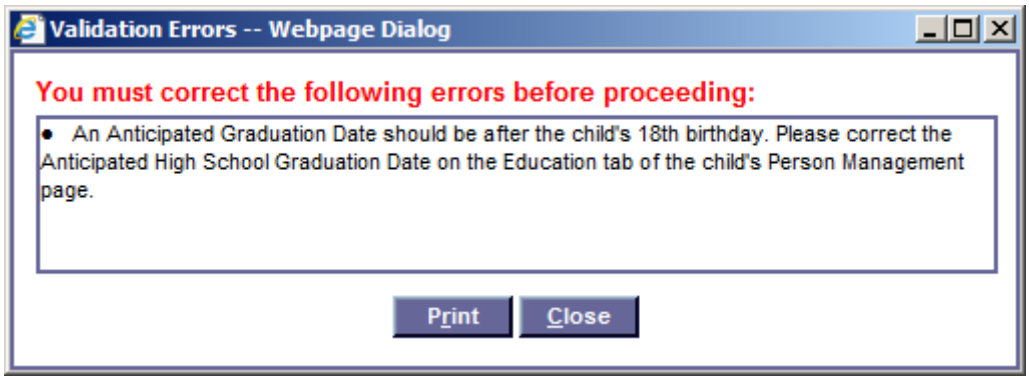


3. Select the Child Over 18 or Child Over 19 for the Type of Determination drop-down. Enter a date in the Effective Date field.



4. Enter applicable High School Information and make the appropriate Yes or No selections. When answering Yes, some questions will require a date be entered. Depending on the question, additional information may be required.

5. Once all of the questions have been answered, click Save. If no date has been entered for the Anticipated High School Graduation Date, the following error message will display. Click the Child Name hyperlink on the Subsidized Guardianship Eligibility Determination page to update the date in Person Management.



6. The Eligibility Status will be updated to ‘Continue Payment’, or ‘Terminate.’ Click Save.

Subsidized Guardianship Eligibility Determination -- Webpage Dialog

eWiSACWIS UAT

TM Print Spell Check Help

Child Information

Child Name: Bird, Blue (678929) DOB: 12/28/1995 Age: 18

Type of Determination: Child Over 18 Effective Date: 02/26/2014 Eligibility Status: Continue Payment

High School Information

High School Name: High School Name

Anticipated high school graduation date: 06/11/2014

Date first High School Information form signed: 09/25/2013

Date last High School Information form signed: 00/00/0000

Eligibility After Age 18

Question 1:

(•) Yes ( ) No Will your child be in a full-time high school/GED program after age 18?

Question 2:

(•) Yes ( ) No Will you be supporting your child after age 18?

Question 3:

( ) Yes (•) No Is your child married? Date of marriage: 00/00/0000

Question 4:

( ) Yes (•) No Has your child entered the military? Date of military enlistment: 00/00/0000

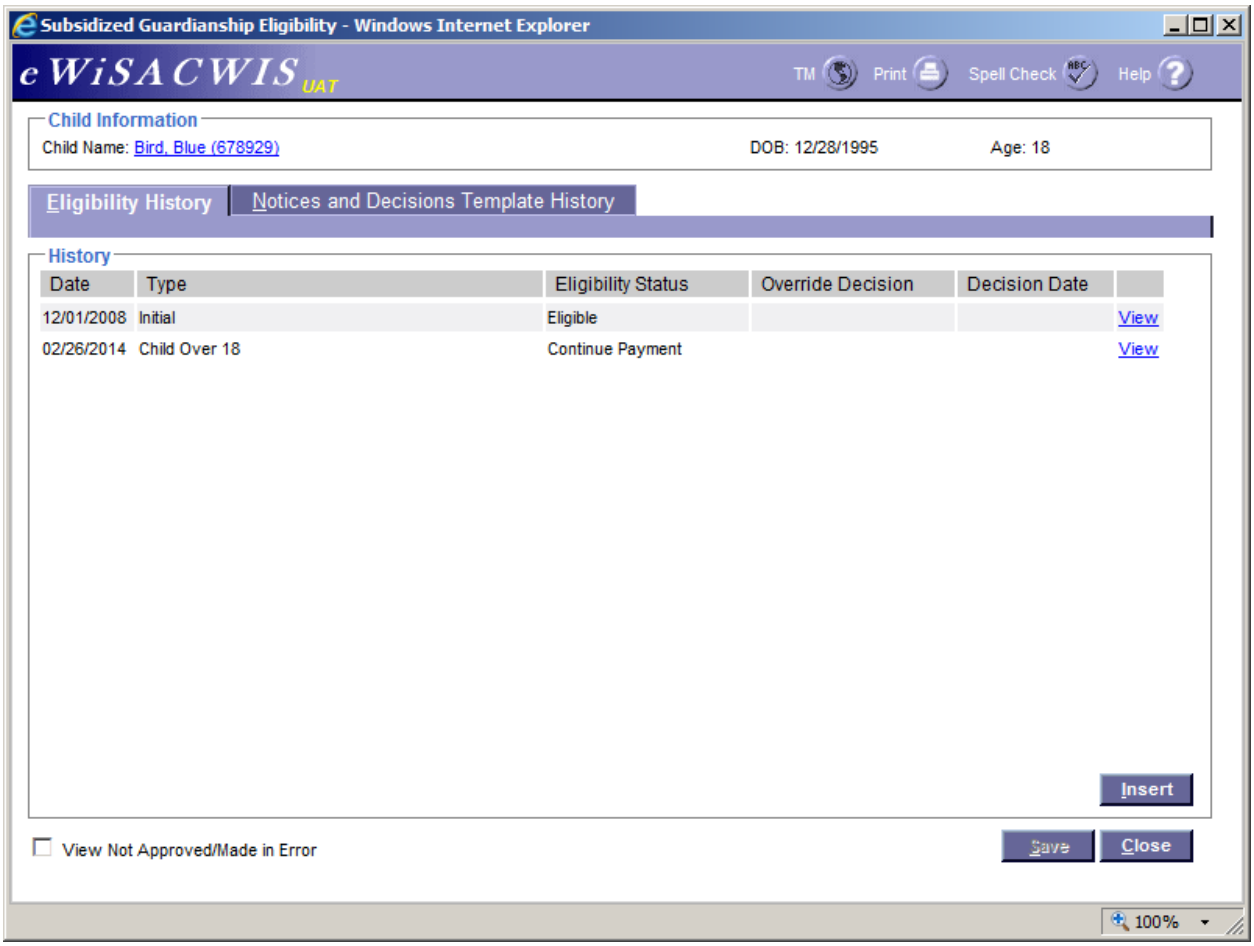
Appeals Override Determination

Options: Go Save Close

Note: If the Eligibility Status is ‘Terminate’ see the Subsidized Guardianship Termination section of this guide for more information.

7. Once completed, send the determination record for approval. Select ‘Approval’ from the Options drop-down and click Go. On the Approval History page, select the Approve radio button. Click Continue to return to the Subsidized Guardianship Eligibility Determination page. Click Save to send the determination for approval.

8. Click Close to return to the Subsidized Guardianship Eligibility page.



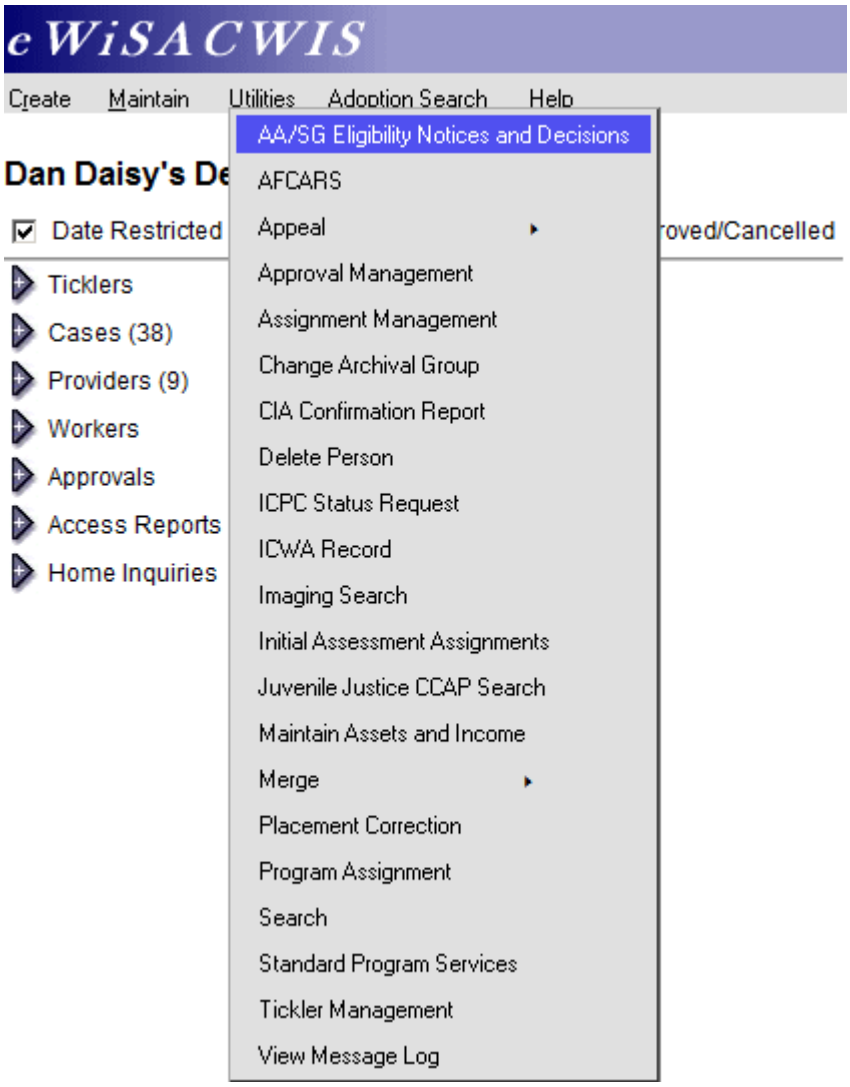
9. Click Close to return to the desktop.

Printing from the AA/SG Eligibility Notices and Decisions Utility

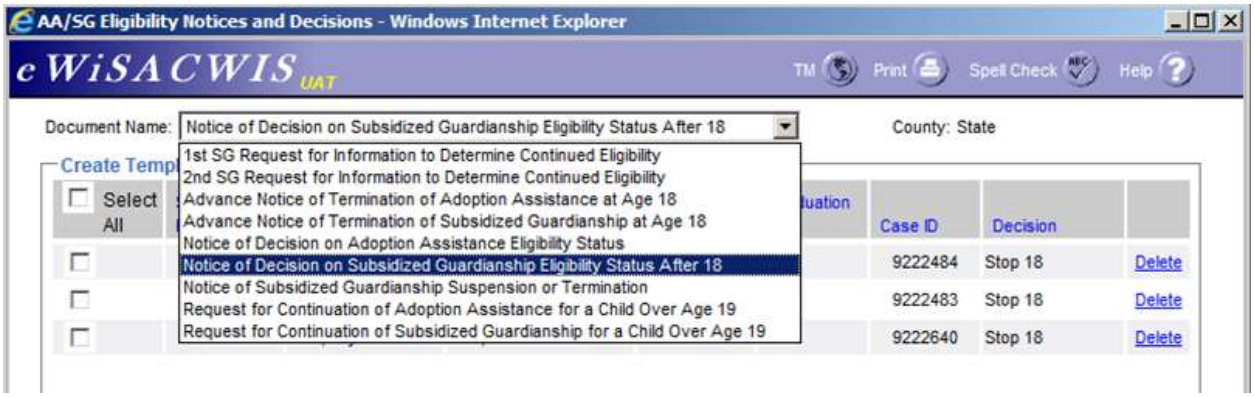
Note: No assignment to the case is needed to print from the utility.

Note: Only cases for the worker's assigned county are displayed.

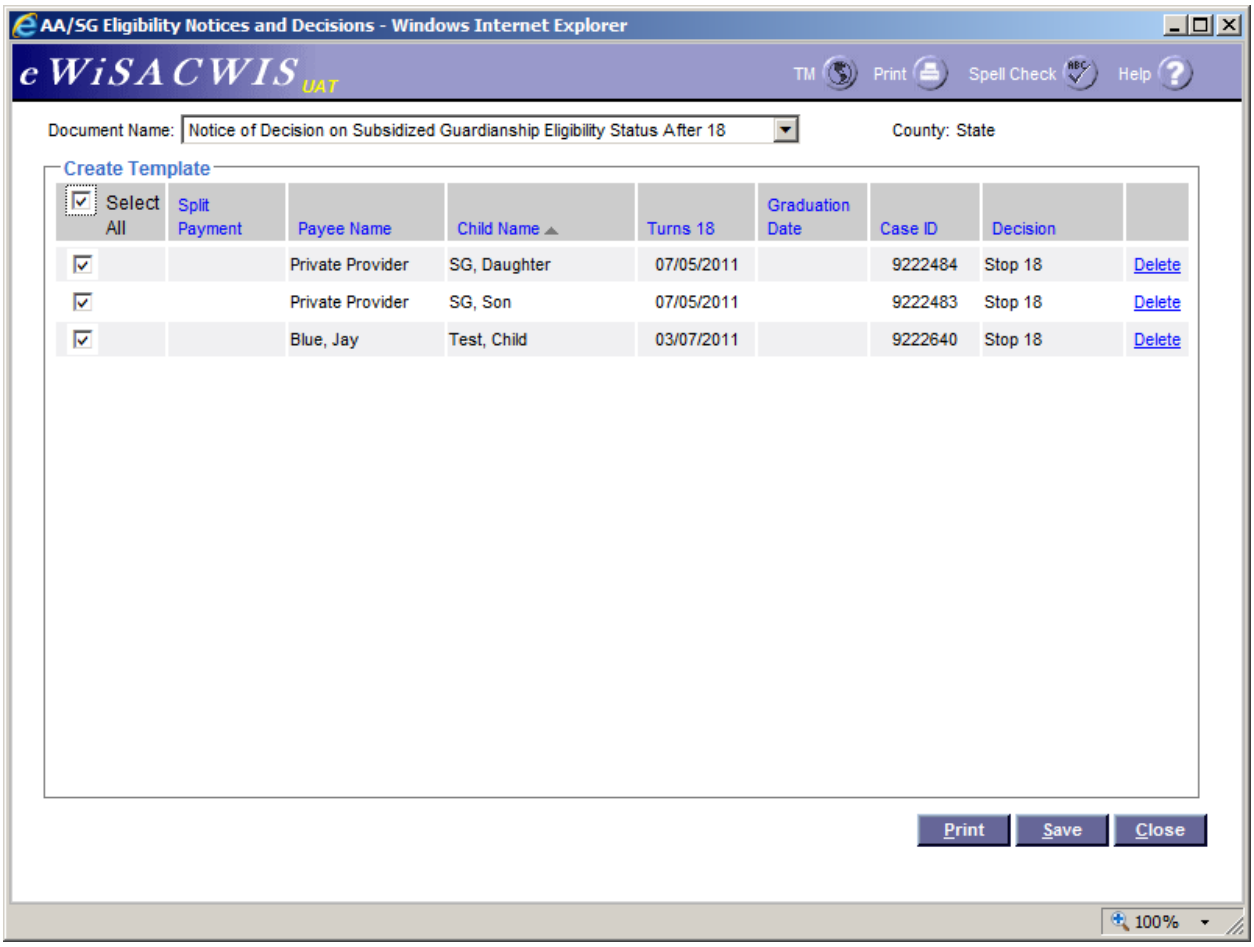
1. The AA/SG Eligibility Notices and Decisions utility is a way to print both single and multiple notices.



2. On the AA/SG Eligibility and Notices and Decisions page, select the Document Name to print.



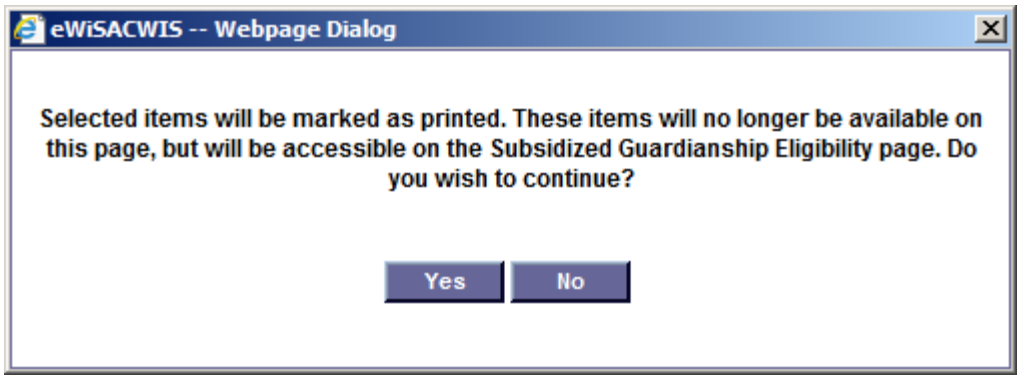
3. Once selected, the utility will list the cases where the notice is due to be sent to the guardian. Check the 'Select All' checkbox or choose specific cases to print. Click Print to open the selected template(s).



Note: If the notice should not be sent, click the Delete hyperlink next to the associated notice. Click Yes to the pop-up to permanently remove the notice. This will remove the notice from the list and no copy will be saved.

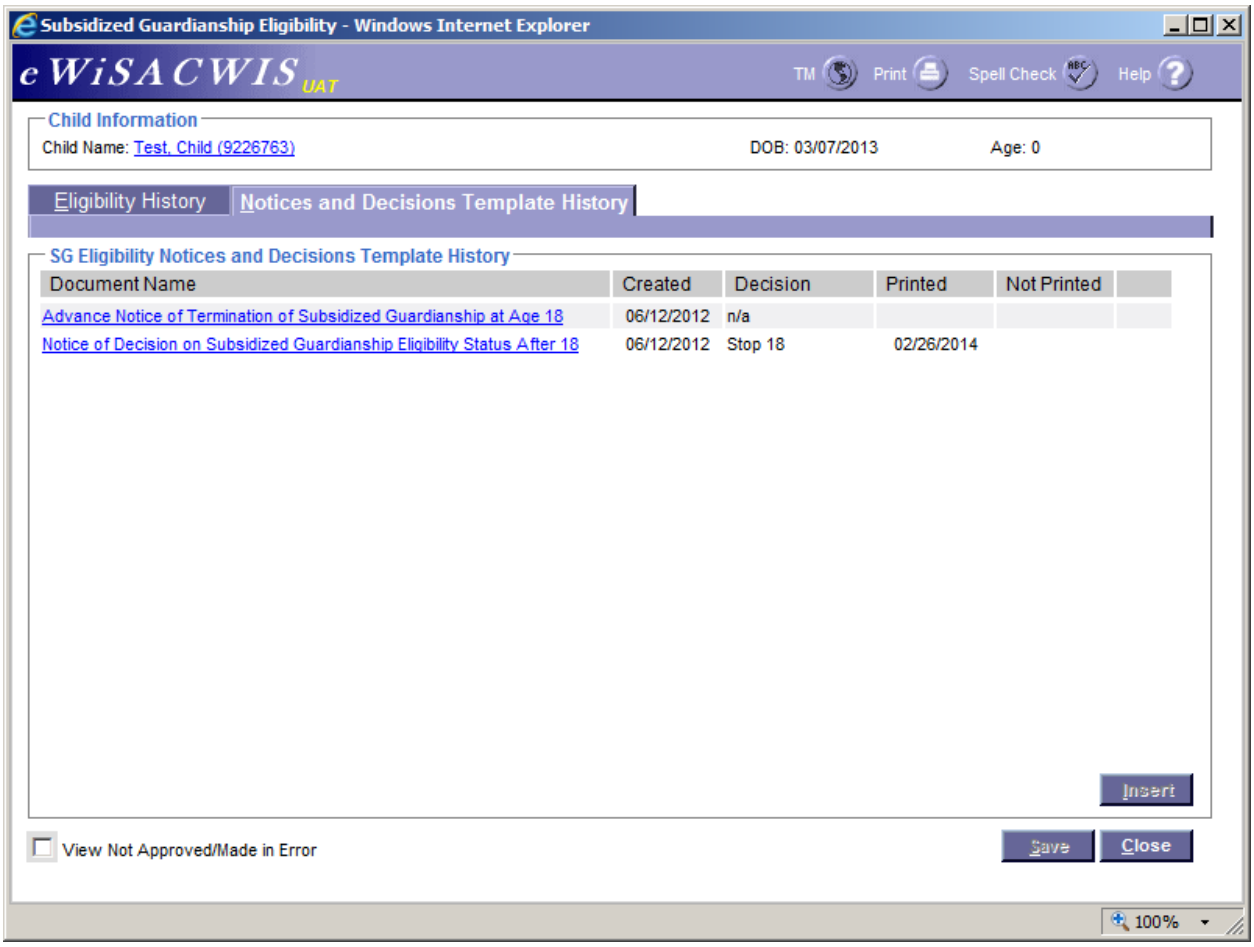
4. The selected templates will open as a group. Select Print. Click Close and Return to eWiSACWIS to return to the AA/SG Eligibility and Notices page.

5. Click Save. The following message will display:



6. Click 'Yes' to continue. The selected notices are now removed from the list. Related ticklers will also be deleted on the primary worker's desktop.

7. The printed document is available under the Notices and Decisions Template History on the SG Eligibility Determination page.



Subsidized Guardianship Agreement Amendments

A child may be eligible for an Amendment as early as 12 months after the SG Agreement date.

See the Subsidized Guardianship Amended Agreement quick reference guide for more information.