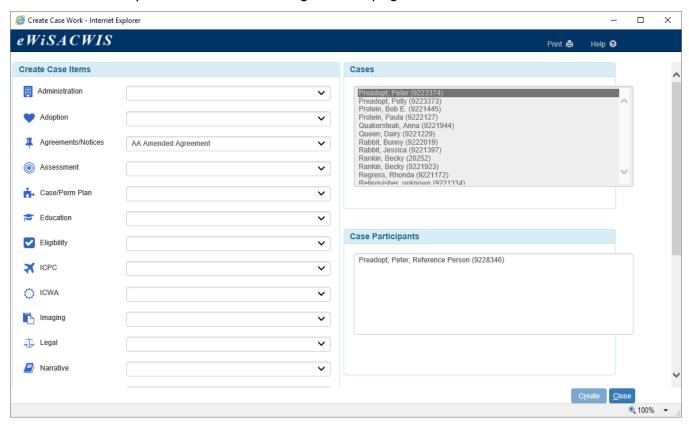
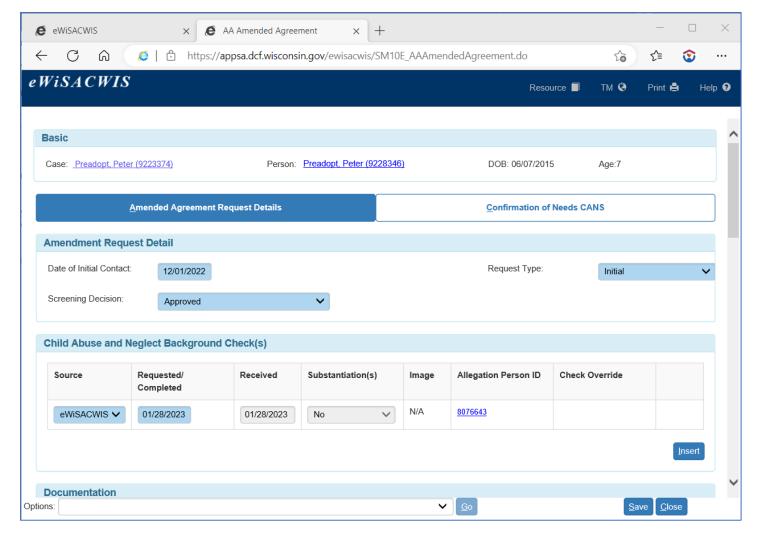
Adoption Assistance Amended Agreement

Note: In order to create an Adoption Assistance Amended Agreement, an assignment to the case is needed.

Creating an AA Amended Agreement

- 1. From the desktop, go to the Cases tab and click the Create Case Work hyperlink Or select Create Case Work under the Actions drop-down next to the specific case. This will open the Create Case Work page.
- 2. On the Create Case Work page, select AA Amended Agreement from the Agreements/Notices drop-down. Select the appropriate case and the appropriate case participant. Click the Create button. This will open the AA Amended Agreement page.



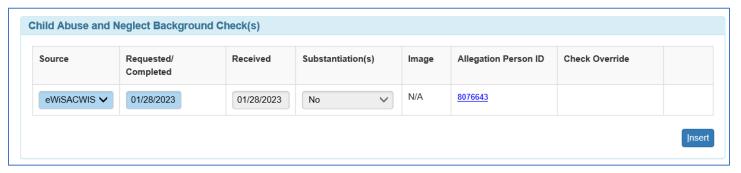


- 3. Complete the required fields in the Amendment Request Detail group box.
 - Date of Initial Contact: The date the contact took place. This date cannot be a future date.
 - Request Type: Select from Initial, Option to Continue, or Subsequent Assessment.
 - Screening Decision: Select from the values in the drop-down.
- 4. Upon initial creation and every subsequent launch of the AA Amended Agreement, the system checks for substantiated allegations for Parent 1/Parent 2.
 - If a substantiated allegation is found for at least one parent, a message will display "Substantiation has been found." When the message is closed, the page will refresh and display a row in the Child Abuse and Neglect Background Check(s) group box.
 - The 'Source' field will be set to eWiSACWIS
 - ii. The 'Requested/Completed' and 'Received' fields will be set to today's date
 - iii. The 'Substantiation(s)' field will be set to Yes
 - iv. The 'Image' field will be blank
 - v. The 'Allegation Provider ID' will display the Person ID of the parent associated with the allegation
 - vi. A 'Check Override' checkbox will display to allow the worker to override (ignore) the substantiated background check.
 - If no substantiated allegation is found, a message will display "Substantiation has not been found." When the message is closed, the page will refresh and display a row for each parent in the Child Abuse and Neglect Background Check(s) group box.
 - i. The 'Source' field will be set to eWiSACWIS

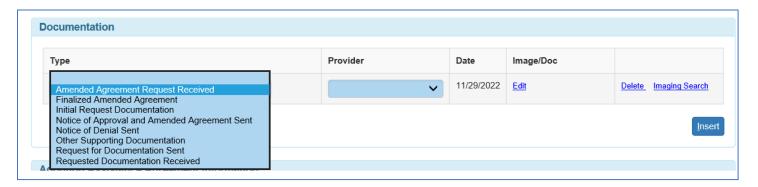
- ii. The 'Requested/Completed' and 'Received' fields will be set to today's date
- iii. The 'Substantiation(s)' field will be set to No
- iv. The 'Image' field will be blank
- v. The 'Allegation Provider ID' will display the Person ID of the parent
- vi. No 'Check Override' checkbox will display
- If any new substantiated allegations are found upon subsequent launch of the page, a message will display "A new substantiation has been found." When the message is closed, the page will refresh and the existing row for the parent is updated.

A new row can be added manually by clicking on the 'Insert' button. Select an option from the 'Location' field. If the eWiSACWIS option is selected, document the 'Requested/Completed' and 'Received' dates and the 'Substantiation(s)' field. If the County option is selected, an image is required to be linked and an Imaging Search hyperlink will be displayed. Click the Imaging Search hyperlink to launch the Imaging Search page.

Note: At least one background check row must be documented in order to approve an amended agreement.



- 5. The Documentation group box is used to record documents that are needed as part of the amendment process.
 - Type: Each of the options in the Type drop-down corresponds to either an image that can be scanned in to the system through the Imaging page (see the Imaging User Guide) or a template that can be created.
 - Provider: The provider associated with the service for the amendment/agreement. The field is disabled when there is no split payment for the service or if the document type is 'Amended Agreement Request Received.'
 - Date: The date the document was sent or received.
 - Image/Doc: Displays an Edit, View, or Text hyperlink to the document.



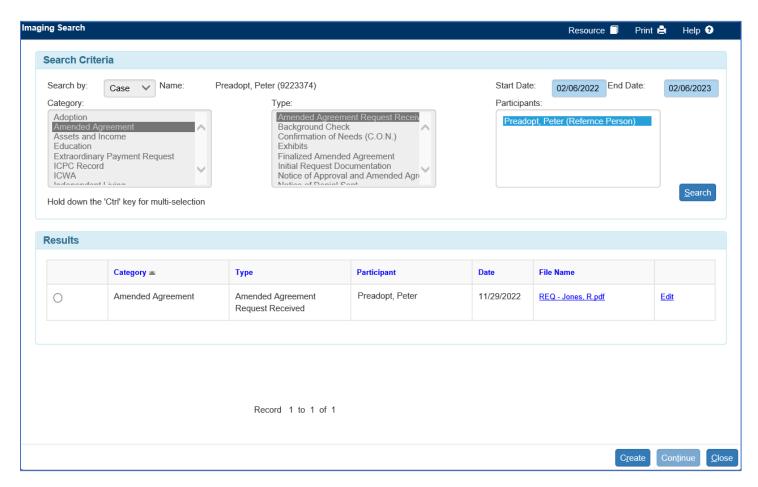
6. Click on the 'Insert' button in the Documentation group box to add a blank row. Select 'Amended Agreement Request Received' from the Type drop-down. Selecting this option will display an

<u>Imaging Search</u> hyperlink beside the row. Click the <u>Imaging Search</u> hyperlink to launch the Imaging Search data retrieval page.

Note: This Type (Amended Agreement Request Received) is required in order to approve the AA Amended Agreement.

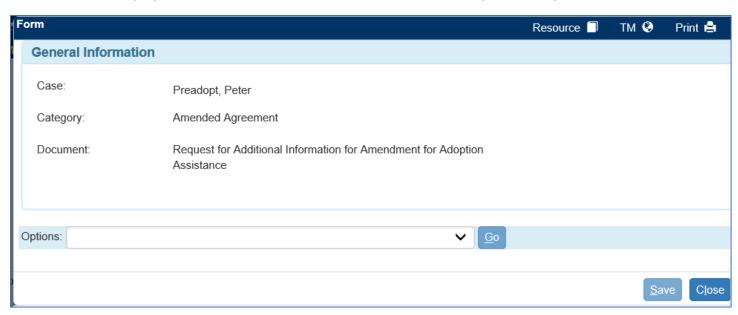
- 7. When the Imaging Search page is launched from the AA Amended Agreement page, the Category defaults to Amended Agreement, the Type defaults to the option selected for the documentation row, and the Participants defaults to the name of the child on the amended agreement record. eWiSACWIS will automatically search for all imaging records of the Type selected from today's date to a year prior. These dates can be modified to further narrow the search.
- 8. If the Results group box has returned the image needed for the amended agreement, select the radio button next to the row then click the Continue button.

Note: If the Results group box does not display the necessary document based on the search criteria, a new image can be created by clicking the 'Create' button. Clicking the 'Create' button will launch the Imaging page (see the Imaging User Guide). Once an image has been created and saved it will automatically display on the Imaging Search page (as long as the Date is within the range of the Start Date and End Date) and can be selected to link to the amended agreement record.

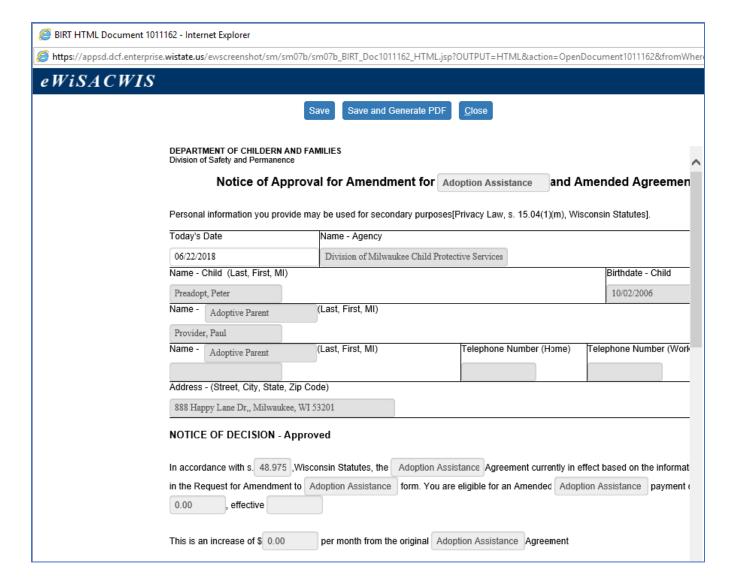


9. Once the image has been linked to the amended agreement, an <u>Edit</u> hyperlink will display in the row. Clicking the <u>Edit</u> hyperlink will launch the Imaging record.

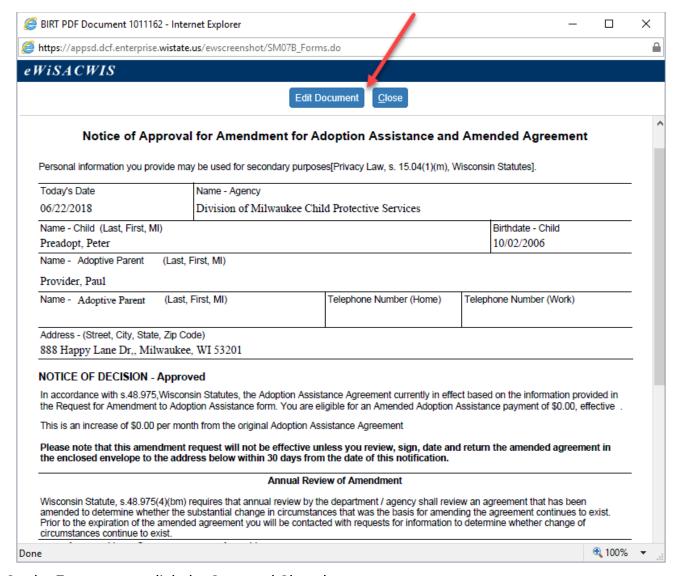
- 10. To create a template for the amended agreement, select 'Request for Documentation Sent,' 'Notice of Approval and Amended Agreement Sent,' or 'Notice of Denial Sent' from the Type dropdown. Selecting one of these options will display a <u>Text</u> hyperlink in the row. To access the template, click the Save button. Then click the <u>Text</u> hyperlink.
- 11. On the Forms page, select the associated document from the Options drop-down and click Go.



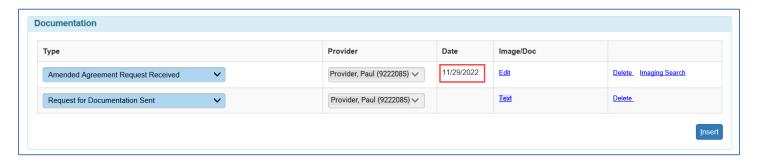
12. Enter any applicable information on the template and click the 'Save and Generate PDF' button, which will launch the template as an uneditable PDF.



Note: If any edits need to be made once you generated the PDF, click the 'Edit Document' button. Otherwise hover the mouse near the top of the screen to print the document and then click the 'Close' button.



- 13. On the Forms page, click the Save and Close buttons.
- 14. The Date is now documented for the associated template.



15. The Adoption Assistance Agreement Information group box displays data from the original Adoption Assistance Agreement: Date of Agreement, Basic Amount (comes from the Child Basic Rate field), Supplemental Amount (from the Child Specific Rate field), Exceptional Amount, and Agreement Amount.

Note: If Adoption Subsidy Type = MA only – at risk or MA only – not at risk, the Basic Amount field will be enabled and can be updated by the user. The new dollar value entered in the Basic Amount field by the user will then be factored into calculating the Amended Agreement Amount.

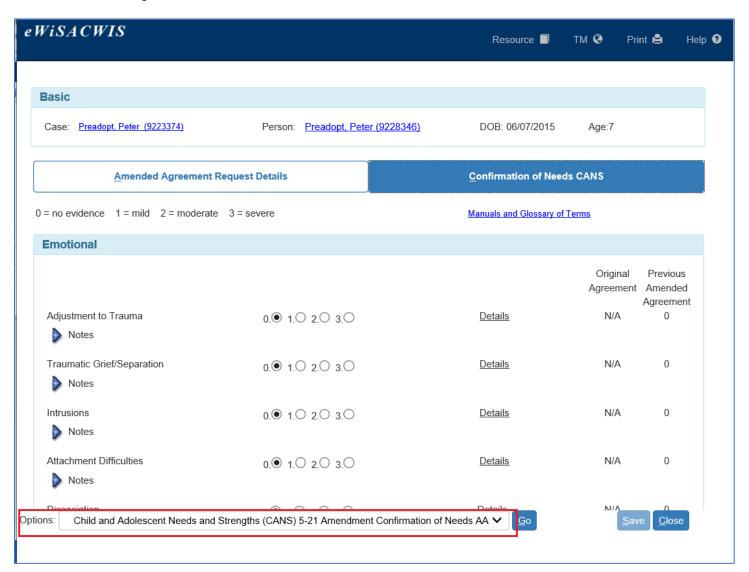
- 16. When an AA Amended Agreement is created, the Supplemental Points and Supplement Rate fields pre-fill from the original Adoption Assistance Agreement. The Amended Agreement Amount will initially default to the original Agreement Amount. The new Supplemental Points and Supplemental Rate needed for the amended agreement will be determined when ratings selections on the Confirmation of Needs CANS tab have been modified. Upon clicking the Save button, the system will automatically calculate the new supplemental points and rate and add this to the Agreement Amount to determine the new Amended Agreement Amount.
- 17. Enter a date in the 'Effective Date' field.

Date of Agreement:	09/01/2016		Basic Amount:	\$384.00	
Adoption Subsidy Type:	MA w/subsidy amount		Supplemental Amount:	\$136.00	
Provider:	Provider, Paul (9222085)		Exceptional Amount:	\$175.00	
			Agreement Amount:	\$695.00	
Requested Suppleme	ental (CANS)	Supplemental Rate:	\$0.00		
Supplemental Folias.	0	оприетента глате.	90.00		
Amended Agreement	Information				
	Information 00/00/0000	Estimated End Date:	00/00/0000	Actual End Date:	00/00/0000
Amended Agreement Effective Date:		Estimated End Date: Additional Amount:	00/00/0000 (\$136.00)	Actual End Date: Amended Agreement Amount:	00/00/0000 \$559.00

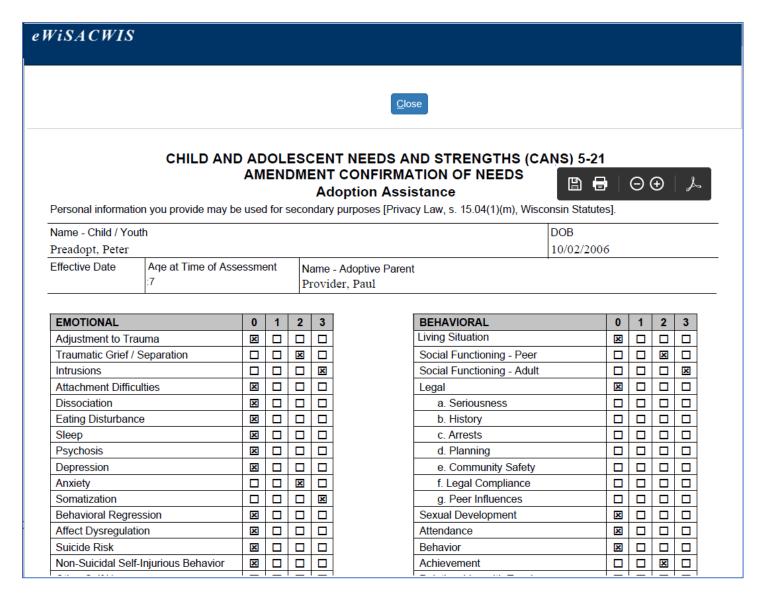
- 18. Click the Confirmation of Needs CANS tab.
- 19. The Confirmation of Needs CANS tab is blank and disabled until a Date Sent/Received is recorded for the document type of Amended Agreement Request Received in the Documentation group box and the Request Type is documented.
 - When the Request Type is either Initial or Subsequent Assessment:
 When a date has been entered, the system determines the age of the child as of the Date Sent/Received and refreshes the page to display the appropriate group boxes (Birth to 5 or 5-17) on the tab.
 - When the Request Type is Continue Current Rate (Option to Continue):
 The system will display the questions from the last fully approved and ended Adoption
 Assistance Amended Agreement for the child (excluding Made in Error) even if the child is in a different age group as of the Request Date.

Note: On the initial amended agreement record, the agreement ratings will be pre-filled to the tab and display the option of that rating in the Original Agreement column (the Previous Amended Agreement column will default to 'N/A' for each rating item). On subsequent amended agreements the ratings will pre-fill from the most recent amended agreement and

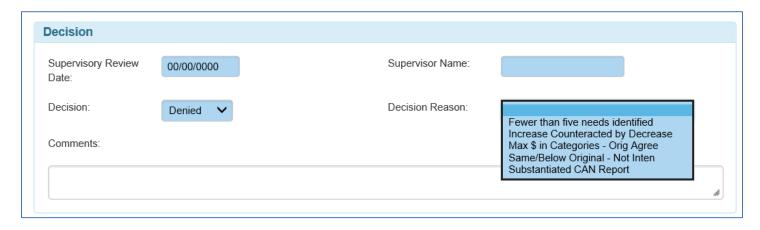
the options in the Previous Amended Agreement column will reflect the ratings from that amended agreement record.



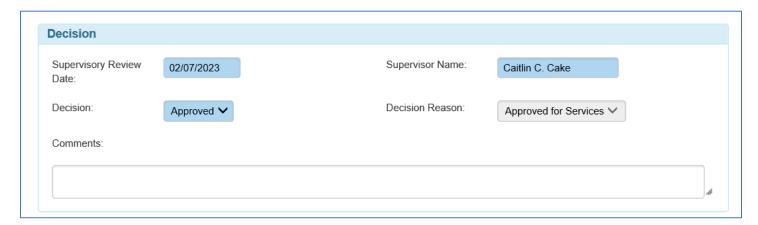
20. Launch the Child and Adolescent Needs and Strengths (CANS) template by selecting the text from the Options field and then click the Go button. Note: In order to see the updated rate on the Amended Agreement Details tab, click the Save button.



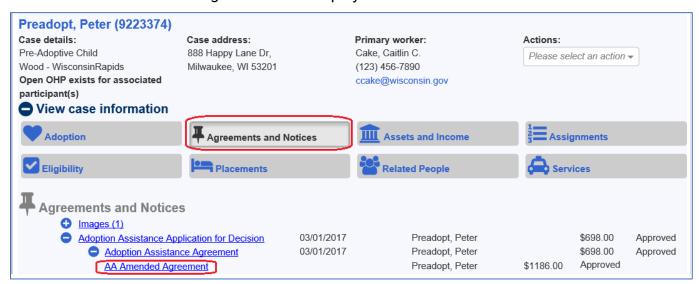
- 21. Click the Close button to return to the AA Amended Agreement page.
- 22. Click the Amended Agreement Request Details tab and verify the Supplemental Points and Supplemental Rate.
- 23. In the Decision group box, select the appropriate option from the 'Decision' drop-down.



- The 'Decision Reason' field will default to Approved for Services when the decision is Approved.
- The 'Decision Reason' field will be defaulted and disabled when the Screening Decision is:
 - i. Family does not wish to proceed
 - ii. Lvl1 Not Elig for Amended Agreement
 - iii. Material Requested Not Received
 - iv. Substantiated CAN Report
 - v. No Response
- The 'Decision Reason' field will be enabled when the Screening Decision is Approved and the Decision is Denied. Enter narrative text in the Comments field, if needed.
- 24. To approve the AA Amended Agreement, select Approval from the Options drop-down and click Go. On the Approval History page, select the Approve radio button then click the Continue button. To complete the approval, click the Save button on the AA Amended Agreement page.

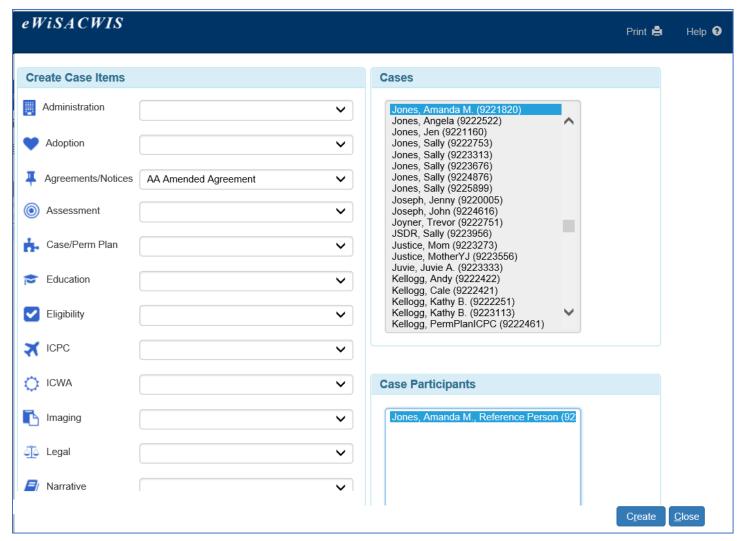


- 25. When the AA Amended Agreement receives final approval the page will become read only. The Edit and Text hyperlinks will change to View hyperlinks.
- 26. The Child Specific Rate for the AAFC Adoptive Home Service will automatically update with the new Amended Agreement Amount. The Effective Date is the month and year in which the new payment rate will begin to be generated for the Service. The rate is always a monthly rate.
- 27. A link to the AA Amended Agreement will display under the case outliner.



Creating a Pre-CANS Adoption Assistance Amended Agreement

- From the desktop, go to Cases tab and click the Create Case Work hyperlink Create Case Work under the Actions drop-down next to the specific case. This will open the Create Case Work page.
- 2. On the Create Case Work page, select AA Amended Agreement from the Agreements/Notices drop-down. Select the appropriate case and the appropriate case participant. Click the Create button. This will open the AA Amended Agreement page.

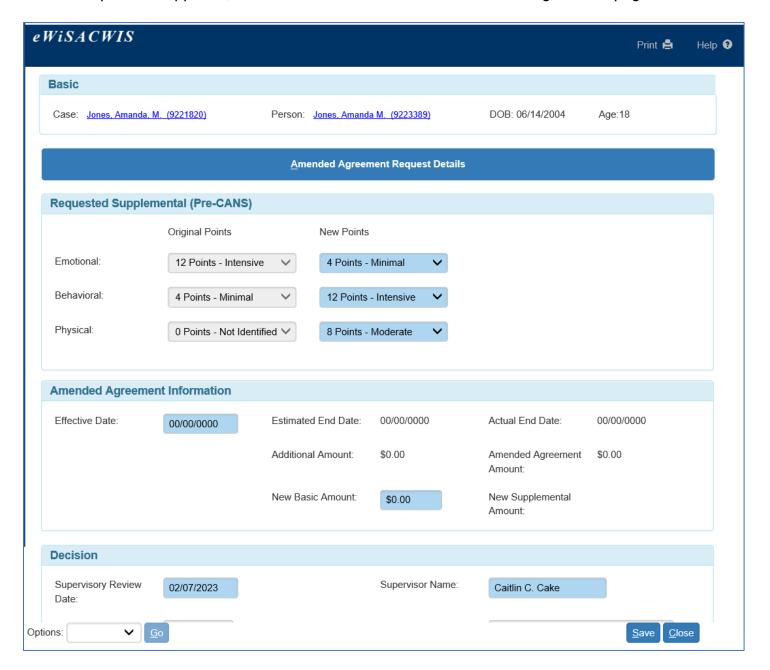


3. On the AA Amended Agreement page, complete the steps above for creating an AA Amended Agreement. For a pre-CANS AA Amended Agreement, the Confirmation of Needs CANS tab does not appear. Instead, the supplemental rate is determined by the Emotional, Behavioral, and Physical points. Select a value from the Emotional, Behavioral, and Physical fields under the New Points column. Once the Save button is clicked, the Amended Agreement Amount and the Additional Amount fields will update.

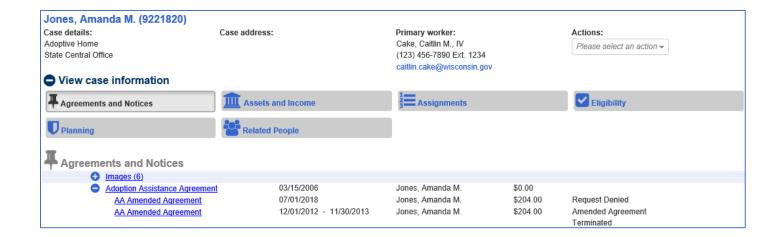
Note: If Adoption Subsidy Type = MA only – at risk or MA only – not at risk, the Basic Amount field will be enabled and can be updated. The updated Basic Amount will then be factored into calculating the Amended Agreement Amount.

4. Enter a date in the 'Effective Date' field and select the appropriate Decision and Decision Reason.

5. To approve the AA Amended Agreement, select Approval from the Options drop-down and click Go. On the Approval History page, select the Approve radio button then click the Continue button. To complete the approval, click the Save button on the AA Amended Agreement page.



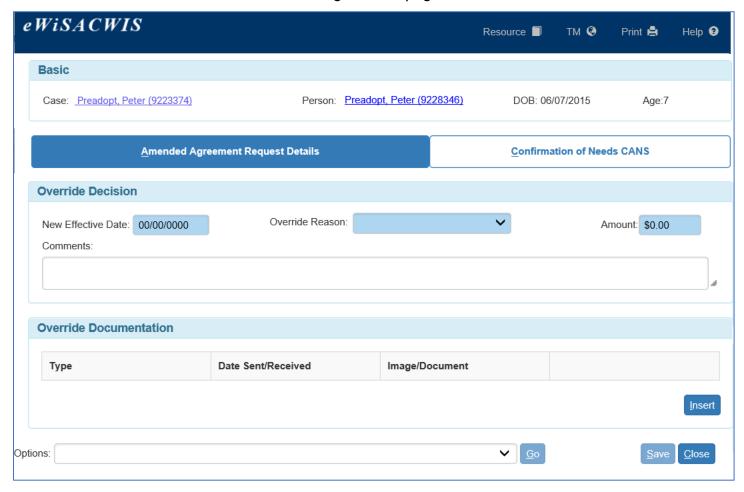
- 6. When the AA Amended Agreement receives final approval the page will become read only. The Edit and Text hyperlinks will change to View hyperlinks.
- 7. The Child Specific Rate for the AAFC Adoptive Home Service will automatically update with the new Amended Agreement Amount. The Effective Date is the month and year in which the new payment rate will begin to be generated for the Service. The rate is always a monthly rate.
- 8. A link to the AA Amended Agreement will display under the case outliner.



Documenting an Amended Agreement Override

When an amended agreement has been approved, the effective date and amended agreement amount can be overridden when the option in the Decision field displays as 'Approved.'

- To document the override first access the approved amended agreement from under the case outliner.
- 2. Scroll to the bottom of the AA Amended Agreement page to the Override Decision section.



- 3. Enter a date in the 'New Effective Date' field.
- 4. Select an option from the 'Override Reason' drop-down.

Note: An override decision can be documented for a denied amended agreement by selecting Denial Overturned. The Amount field will be disabled as the system does not update the child specific rate for denied records. When a denied amended agreement is overridden, the system will allow you to create a subsequent amended agreement without having to wait a year.

- 5. Enter a value in the 'Amount' field.
- 6. Click the Insert button to add a row in the Override Documentation group box. If the selected Type requires attaching an image, click the <u>Imaging Search</u> hyperlink and retrieve the associated Imaging record from the Imaging Search page (described earlier in this guide). If the the selected Type requires attaching a template, click the Save button then click the <u>Text</u> hyperlink to create the Forms page and the template. Save and close the Forms page after the PDF has been generated. Once the Forms page is closed the system will generate the Date Sent/Received.

- 7. If other images related to the appeals override decision need to be scanned and linked to the amended agreement, additional rows can be added to the Override Documentation group box as needed.
- 8. Click the Save button. Upon save the system will freeze the fields in the Override Decision group box. The system will update the Rate History page for the AAFC Adoptive Home Service with the new rate based on the updated amount entered for the override decision.