

# Creating a Private Adoption Assistance Agreement

**Note:** Assignment to the Adoptive Home-Private Adoption case is needed to create the agreement.

## Related User Guides

[Adoption Assistance Amended Agreement](#)

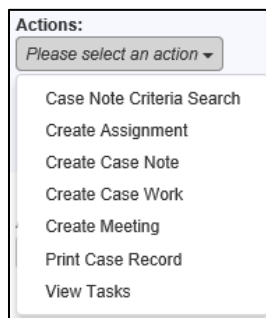
[Ending an Adoption Assistance Agreement](#)

[Reopening an Adoption Assistance Agreement](#)

To create a Private Adoption Assistance Agreement, the following pieces of work must be completed (and approved):

- Screened-In Adoption-Private Adoption Service Report
- Provider Record
- Legal Record of 'Adoption Finalized'
- Child & Adolescent Needs & Strengths (CANS) **Note:** – This is only when creating a Private Adoption Assistance Agreement w/Subsidy

1. From the desktop, go to the Cases tab and click the Create Case Work hyperlink [Create case work](#) or select Create Case Work from the Actions dropdown next to the specific case to open the Create Case Work page.

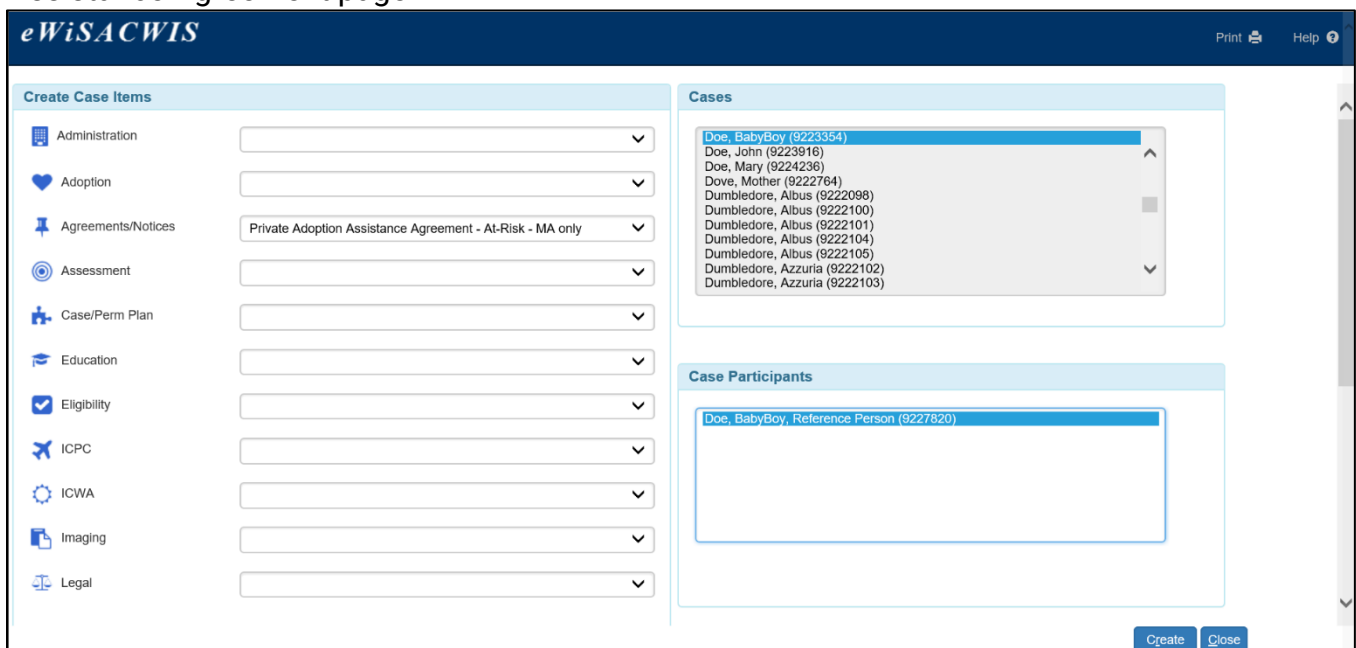


Actions:

Please select an action ▼

- Case Note Criteria Search
- Create Assignment
- Create Case Note
- Create Case Work
- Create Meeting
- Print Case Record
- View Tasks

2. On the Create Case Work page, select 'Private Adoption Assistance Agreement - At-Risk - MA only' or 'Private Adoption Assistance Agreement - MA with Subsidy' from the Agreements/Notices drop-down. Select the appropriate Case and Participant and click Create to open the Adoption Assistance Agreement page.



The screenshot shows the 'eWiSACWIS' interface. On the left is a sidebar with 'Create Case Items' and various categories like Administration, Adoption, Agreements/Notices, Assessment, Case/Perm Plan, Education, Eligibility, ICPC, ICWA, Imaging, and Legal. The 'Agreements/Notices' category is selected, showing a dropdown menu with 'Private Adoption Assistance Agreement - At-Risk - MA only'. On the right, there are two panels: 'Cases' and 'Case Participants'. The 'Cases' panel lists several cases, including 'Doe, BabyBoy (9223354)', 'Doe, John (9223916)', 'Doe, Mary (9224236)', 'Dove, Mother (9222764)', 'Dumbledore, Albus (9222098)', 'Dumbledore, Albus (9222100)', 'Dumbledore, Albus (9222101)', 'Dumbledore, Albus (9222104)', 'Dumbledore, Albus (9222105)', 'Dumbledore, Azzuria (9222102)', and 'Dumbledore, Azzuria (9222103)'. The 'Case Participants' panel lists 'Doe, BabyBoy, Reference Person (9227820)'. At the bottom right, there are 'Create' and 'Close' buttons.

- The Private Adoption Assistance Agreement page is divided into the following group boxes: Agreement Information, Adoption Assistance Payee, Insurance Information, Supplemental Rate, and Payment Information. The following describes both pre-filled and user entered fields for each group box.

**Agreement Information**

Case Participant: [Jones, Joannie \(9232258\)](#) Date of Agreement:

**Agreement Type:** Adoption Assistance Agreement Estimated End Date:

Private Adoption Type:  Agreement Amount:

Adoption Subsidy Type: MA only - at risk

Applicable Exceptions:

☐ Age (7+) ☒ Child at High Risk ☐ Member of a Minority Group ☐ Sibling Group (2+ Placed Together) ☐ Moderate/Intensive Needs ☐ Indian Child

Provider Name: [Provider, Home \(9221447\)](#) [Search](#) County:

**Adoption Assistance Payee**

Payee Name Type:  Payee Name: Home Provider or Male Provider

**Insurance Information**

☒ Yes ☐ No The adoptive parent will add the child to their private health insurance plan

Health Insurance Information Form (F-10115): None selected [Imaging Search](#)

**Supplemental Rate**

CANS Effective Date: N/A Supplemental Points: N/A Supplemental Rate: N/A

**Payment Information**

Basic: N/A

Supplemental: N/A

☐ Exceptional: \$0.00

Options:

#### A. Agreement Information

- Case Participant: Prefills with the child's name as a hyperlink to Person Management.
- Date of Agreement: User-entered start date of the Private Adoption Assistance Agreement, and when payment begins.

- Agreement Type: Defaults to Adoption Assistance Agreement.
- Estimated End Date: Prefills the date of the child's 19th birthday.
- Private Adoption Type: Prefills value from Services Report (editable).
- Agreement Amount: Prefills with the total of the Basic, Supplemental, and Exceptional amounts.
- Adoption Subsidy Type: Select the value to designate the type of subsidy specific to the agreement.

**Note:** To qualify for an adoption subsidy (MA w/ subsidy amount), at least 5 CANS items (used in the rate algorithm) must be rated as a 2 or 3 unless the child qualifies for at least one Applicable Exception:

Applicable Exceptions:					
<input type="checkbox"/> Age (7+)	<input checked="" type="checkbox"/> Child at High Risk	<input type="checkbox"/> Member of a Minority Group	<input type="checkbox"/> Sibling Group (2+ Placed Together)	<input type="checkbox"/> Moderate/Intensive Needs	<input type="checkbox"/> Indian Child

- Provider Name: Click the [Search](#) hyperlink to find the Provider. Once selected, the Provider will prefill to the Agreement as a name hyperlink (to Provider Management).
- County: Prefills with the county of the worker who is creating the agreement.

#### B. Adoption Assistance Payee

- Payee Name Type: If Parent 1 and Parent 2 are listed on the agreement, the field defaults to 'Parent 1 or Parent 2' once a Provider is associated to the agreement. The Payee Name Type field remains enabled, even after approval of the Adoption Assistance Agreement.
- Payee Name: Defaults to blank until a provider is selected. The payee(s) displayed in this field pre-fill to the AAFC Adoptive Home service page.

#### C. Insurance Information:

- User-selected 'Yes' or 'No' values to indicate if the adoptive parent will add the adopted child to their private health insurance plan.
  - If 'Yes' is selected, the 'Health Insurance Information Form (F-10115)' field will display, along with an 'Imaging Search' hyperlink


#### D. Supplemental Rate:

- Prefills the CANS Effective Date, Supplemental Points, and Supplemental Rate from the most recently approved CANS.

#### E. Payment Information:

- Basic Rate: Prefills basic rate based on the age of the child at the time of the agreement.
- Supplemental: Prefills amount based on the most recent, approved CANS.
- Exceptional: If applicable, select the Exceptional checkbox to display additional sub-categories. Select a checkbox for the applicable sub-categories and enter the associated dollar amount. In most instances, the Payment Justification field will already be pre-filled and the field will be disabled. If not, provide an explanation in the Payment Justification narrative box. Refer to policy for details on acceptable justifications.

**Note:** checkbox is only enabled if the Adoption Subsidy Type is 'MA w/subsidy amount'

Payment Information			
	Basic:	\$0.00	
	Supplemental:	\$160.00	
<input checked="" type="checkbox"/>	Exceptional:	\$0.00	
	Least Restrictive Setting	\$0.00	
	<input type="checkbox"/> Adoptive Parent Supervision, Time and Training		\$0.00
	<input type="checkbox"/> Personal Incidentals - Care Needs	\$0.00	
	<input type="checkbox"/> Personal Incidentals - Normalcy Activities	\$0.00	
	<input type="checkbox"/> Transportation	\$0.00	
	<input type="checkbox"/> WI Shares		
<input type="checkbox"/>	Sibling Placement		
<input type="checkbox"/>	Transportation to School of Origin		
<input type="checkbox"/>	Replacement of Basic Wardrobe		

- Next, send the Private Adoption Assistance Agreement for approval by selecting 'Approval' from the Options drop-down and clicking Go. On the Approval History page, select the Approve radio button and click Continue to return to the Private Adoption Assistance Agreement page. Click Save on the Private Adoption Assistance Agreement page to send for approval.
- Upon final approval, a fully approved AAFC Adoptive Home services placement is created where the begin date of the Service will be set to the Date of Agreement and the child-specific rate will be set to the agreement amount.

**Doe, BabyBoy (9223354)**  
 Case details:  
 Adoptive Home - Private Adoption (Agency)  
 SRO-DCFS-Madison

Case address:  
 11 River Road  
 Madison, WI 53701  
 (608) 555-1212 Ext. 12

Primary worker:  
 Cake, Caitlin M., III  
 (123) 456-7890 Ext. 1234  
[caitlin.cake@wisconsin.gov](mailto:caitlin.cake@wisconsin.gov)

Actions:

**View case information**

**Agreements and Notices**

Agreement	Date	Child	Amount
<a href="#">Private Adoption Assistance Agreement (Agency)</a>	12/26/2017	Doe, BabyBoy	\$560.00

**Services**

Service	Date	Child	Status	Location
Open Services <a href="#">Provider Home - AAFC Adoptive Home</a>	12/26/2017	Doe, BabyBoy	Approved	State