# Subsidized Guardianship Initial Determination & Case Creation

**Note:** Assignment to the family case is needed to document case work (except for imaging). Tasks are sent to the Primary assignment to the case.

**Note: Do not** close the Out of Home Placement under the family case as this will prevent deactivation and not allow the Subsidized Guardianship case to be created.

#### Introduction

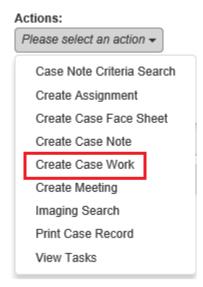
Establishing Subsidized Guardianship for a child consists of multiple steps; from the documentation of initial eligibility to Subsidized Guardianship case creation and includes continued program eligibility determination(s) and documentation. The following guide addresses the Initial Subsidized Guardianship Eligibility determination on the family case through the deactivation and creation of the child's Subsidized Guardianship case.

#### **Related User Guides**

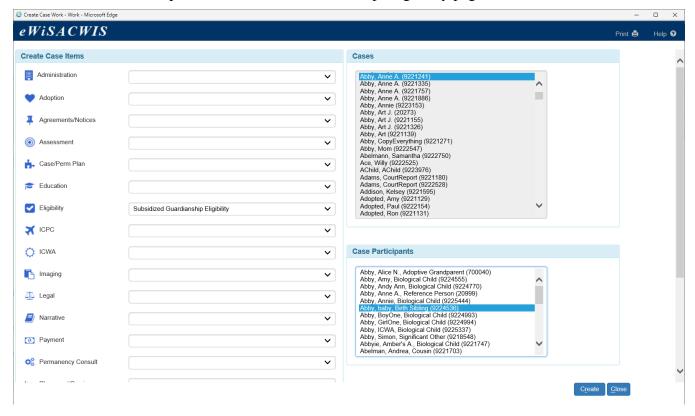
Reopening a Subsidized Guardianship Agreement Ended in Error
Subsidized Guardianship Amended Agreement
Subsidized Guardianship Continued Eligibility and Related Notices and Decisions

### **Documenting an Initial Subsidized Guardianship Determination**

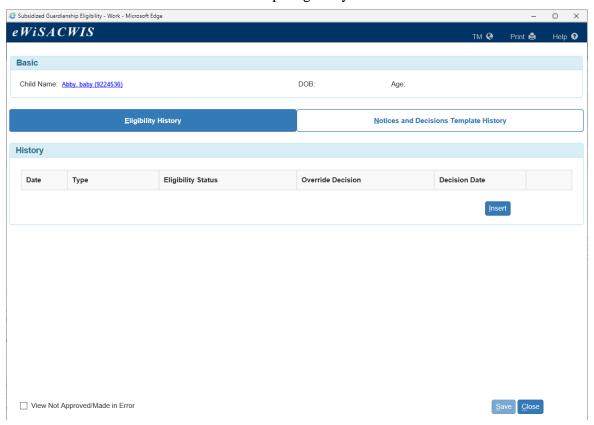
1. From the desktop, go to the Cases tab and click the Create Case Work hyperlink **○** Create Case work or select Create Case Work from the Actions drop-down next to the specific case to open the Create Case Work page.



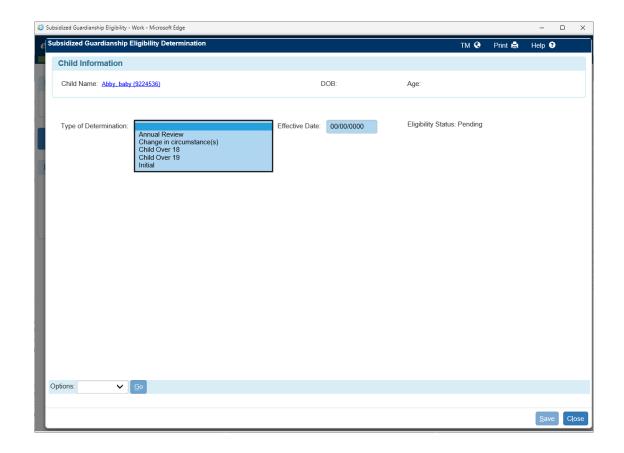
2. On the Create Case Work page, go to Eligibility and select 'Subsidized Guardianship Eligibility' from the drop-down. Select the case and participant (child who you are determining eligibility for) and click Create to open the Subsidized Guardianship Eligibility page.



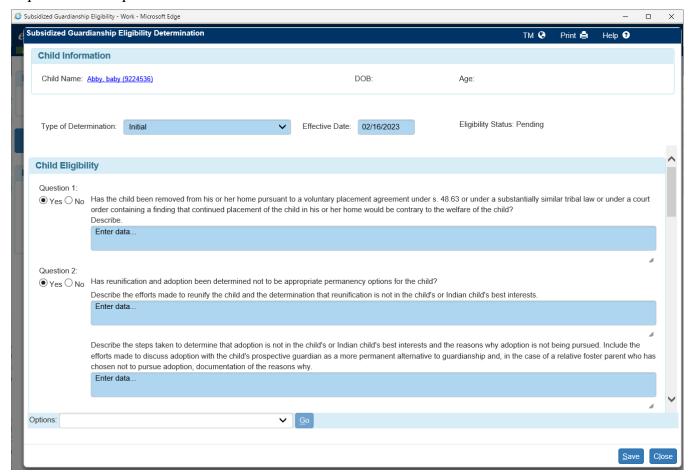
3. Click Insert on the Eligibility History tab of the Subsidized Guardianship Eligibility page to open and create the Initial Subsidized Guardianship Eligibility Determination.



4. On the Subsidized Guardianship Eligibility Determination page, select 'Initial' from the Type of Determination drop-down and enter an Effective Date (the date the eligibility determination is made).



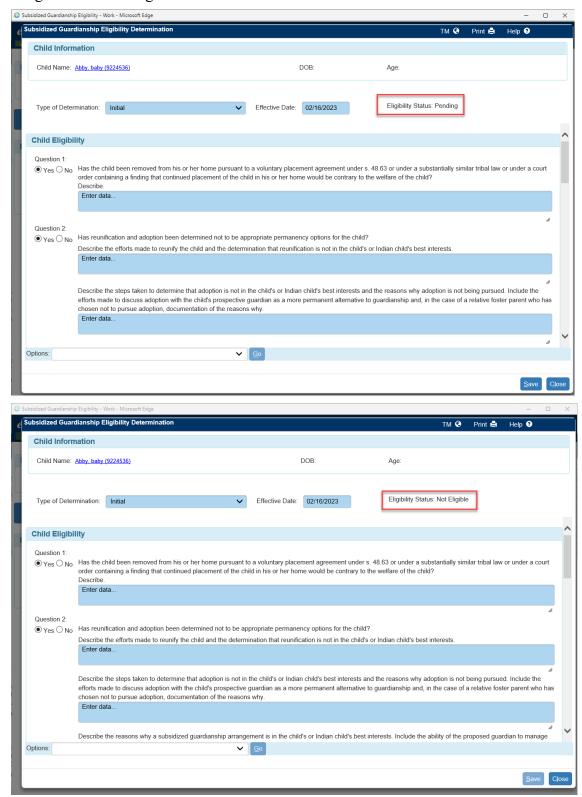
5. Make the appropriate Yes or No selection for each question. Associated narrative text fields are only required when a question is answered Yes.



**Note:** If the Indian Tribe field on the child's Person Management page is blank, , Question 3 will be ignored when determining the Subsidized Guardianship eligibility status.

**Note:** If the child is under the age of 14, Question 6 will be ignored when determining the Subsidized Guardianship eligibility status.

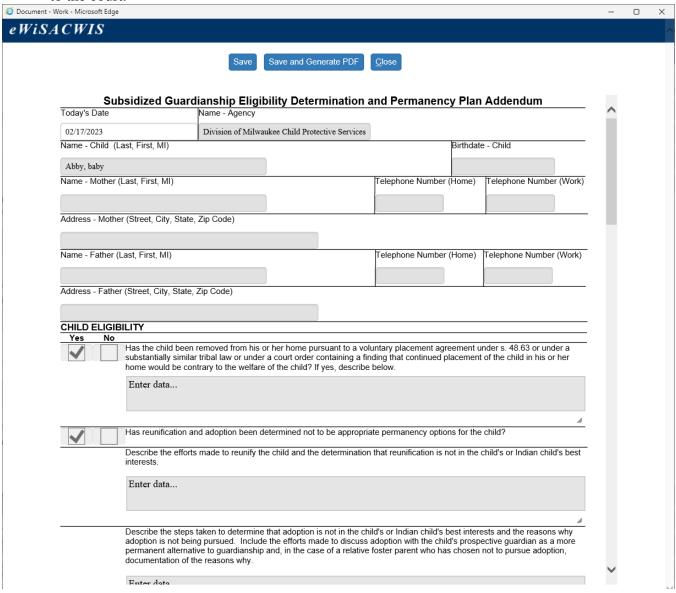
6. Once all the questions are answered, click Save. The Eligibility Status will be updated to either 'Eligible' or 'Not Eligible.'



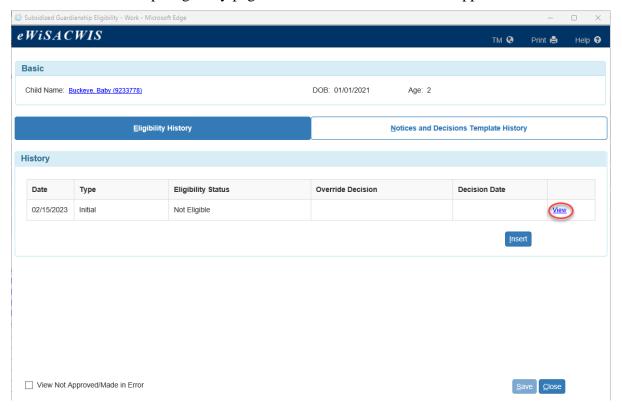
**Note:** If the Eligibility Status remains as 'Pending' after save check that all the questions have been answered and the associated information has been entered.

After the Eligibility Status has been updated, select the 'SG Eligibility Determination and Permanency Plan Addendum' from the Options drop-down on the bottom of the page and click Go to launch the template. Most information prefills from the Eligibility Determination. Once complete, Save and Generate the PDF and print the template. Click Close to return to the Subsidized Guardianship Eligibility Determination page.

**Note:** The agency must include this form in the child's permanency plan report that is submitted to the court.

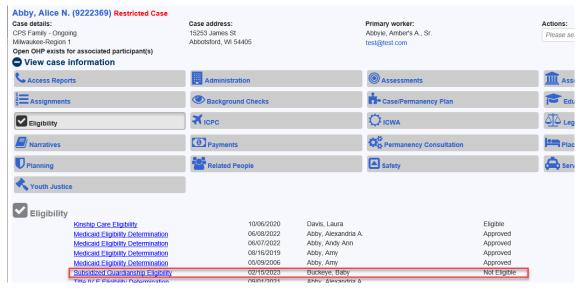


7. Next, send the Eligibility Determination for approval by selecting 'Approval' from the Options drop-down and clicking Go. On the Approval History page, select the Approve radio button and click Continue to return to the Subsidized Guardianship Eligibility Determination page. Click Save on the Subsidized Guardianship Eligibility page to send the determination for approval.



**Note:** Prior to supervisor approval a determination is available to <u>Edit</u>. Once approved, a <u>View</u> hyperlink appears to view the Subsidized Guardianship Eligibility information associated with that determination.

- 8. Click Close on the Subsidized Guardianship Eligibility page to return to the desktop.
- 9. Upon approval, a <u>Subsidized Guardianship Eligibility</u> hyperlink displays for the child under the Eligibility section on the family case and reflects the appropriate status; 'Eligible' or 'Not Eligible'.

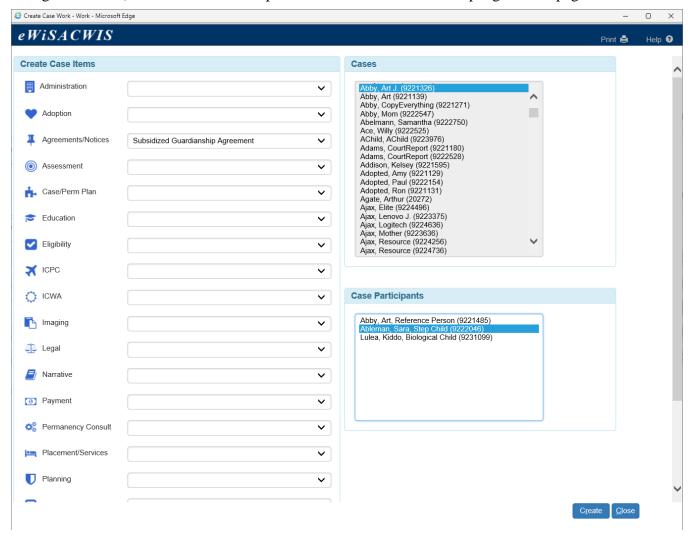


### Creating a Subsidized Guardianship Agreement

**Note:** The Eligibility Status of the Initial Subsidized Guardianship Eligibility Determination must be 'Eligible' in order to create the agreement.

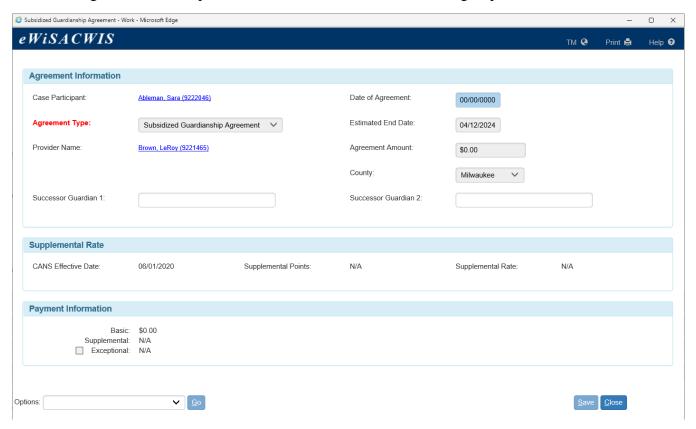
**Note:** The agreement can only be created in a) the case that houses the Out of Home Placement and b) only if a CANS and Foster Care Rate (except Level 1) are completed and approved for that Out of Home Placement.

- 2. On the Create Case Work page, select 'Subsidized Guardianship Agreement' from the Agreements/Notices drop-down. Select the Case and Participant (child who you are creating the agreement for) and click Create to open the Subsidized Guardianship Agreement page.



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3. Enter information for the Subsidized Guardianship Agreement. The agreement is divided into the following group boxes: Agreement Information, Supplemental Rate, and Payment Information. The following describes both prefilled and user entered fields for each group box.



#### A. Agreement Information

- Case Participant: Prefills with the child's name as a hyperlink (to Person Management).
- Date of Agreement: User entered date (date agreement was created).

**Note:** The agreement must be created, reviewed with the guardian, and signed by both parties prior to the court hearing granting guardianship.

- Agreement Type: Defaults to Subsidized Guardianship Agreement.
- Estimated End Date: Prefills the date of the child's 18th birthday.
- Provider Name: Prefills the current provider's name as a hyperlink (to Provider Management).
- Agreement Amount: Prefills with the total of the Basic and Supplemental from the child's most recent Foster Care Rate. Exceptional Rate will be included if applicable.

**Note:** There is a separate rate algorithm from CANS for foster care and subsidized guardianship. As a result, there may be a slight difference in the total Agreement Amount from the child's most recent Foster Care Rate.

- County: Prefills County.
- Successor Guardian 1 & Successor Guardian 2: If the proposed guardian(s) identifies a
  prospective successor guardian(s) to assume the duty and authority of the guardianship upon the
  death or incapacity of the guardian(s), enter the identified individual(s) name(s) in the
  appropriate field.

**Note:** The guardian may identify a prospective successor guardian(s) or change who is currently listed as the prospective successor guardian(s) at any point before the guardian(s) death or incapacitation. See the <u>Subsidized Guardianship Amendment (Successor Guardian)</u> user guide for more details.

### **B.** Supplemental Rate

• Prefills information from the child's most recently approved CANS linked to the child's most recently approved placement.

**Note:** There is a separate rate algorithm from CANS for foster care and subsidized guardianship. As a result, there may be a slight difference in the supplemental points and supplemental rate.

# C. Payment Information

- Basic Rate: Prefills basic rate based on the age of the child at the time the agreement is created.
- Supplemental: Prefills amount based on the most recently approved CANS linked to the child's most recently approved placement.
- Exceptional: If applicable, select the Exceptional checkbox and select all the justified exceptional cost checkboxes and enter an amount. The Payment Justification narrative boxes will appear for any exceptional cost checkbox you select and will prefill with text, with the exception of the "Other" checkbox is selected.

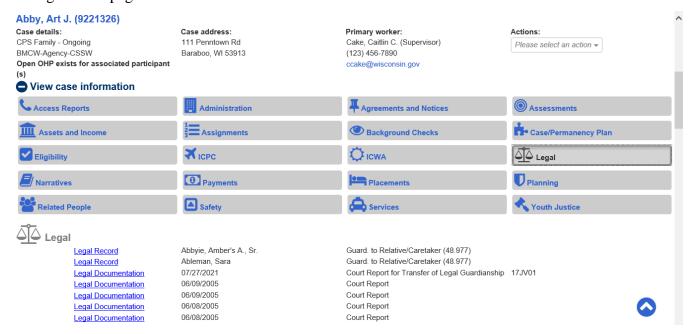
**Note:** The basic rate and exceptional payment amount cannot be modified after the guardianship is established. The supplemental rate can be adjusted if the guardian requests an amendment to the payment amount. See the Subsidized Guardianship Amended Agreement User Guide for more details.

**Note:** Supplemental and Exceptional amounts are only available if the provider listed on the agreement is a Level 2+.

4. Once all information is entered, select 'Subsidized Guardianship Agreement' from the Options drop-down and click Go to launch the template.



5. Most information prefills from the Subsidized Guardianship Agreement to the template. Click Save and Generate PDF to print the template. Click Close to return to the Subsidized Guardianship Agreement page.



6. Next, send the agreement for supervisory 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 Subsidized Guardianship Agreement page. Click Save to send for approval.

**Note:** The agreement must be approved and signed by the agency and the prospective guardian before the guardianship is established by court.

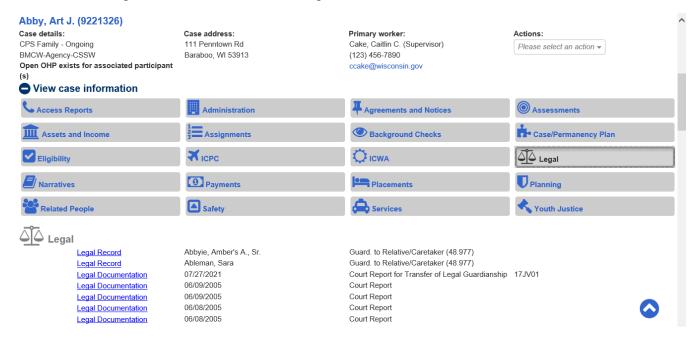
**Note:** Upon approval of the agreement, a Subsidized Guardianship service type for the provider (if open) will be automatically added after overnight processing. If the provider record is not open, the service will need to be manually added.

- 7. Click Close on the Subsidized Guardianship Agreement page to return to the desktop.
- 8. When the desktop is refreshed, a <u>Subsidized Guardianship Agreement</u> hyperlink displays for the child under the Agreements and Notices section of the family case.

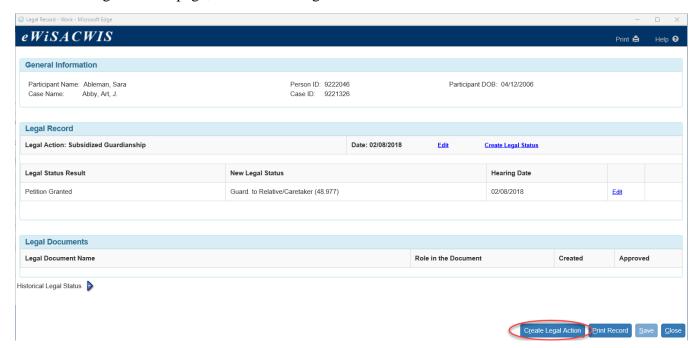
# Creating a Legal Action Record for Subsidized Guardianship

1. From the desktop, open the child's Legal Record on the family case.

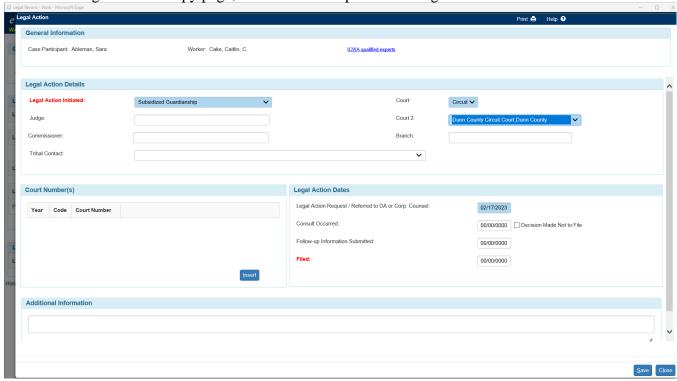
Note: See the Legal Record User Guide if a Legal Record needs to be created.



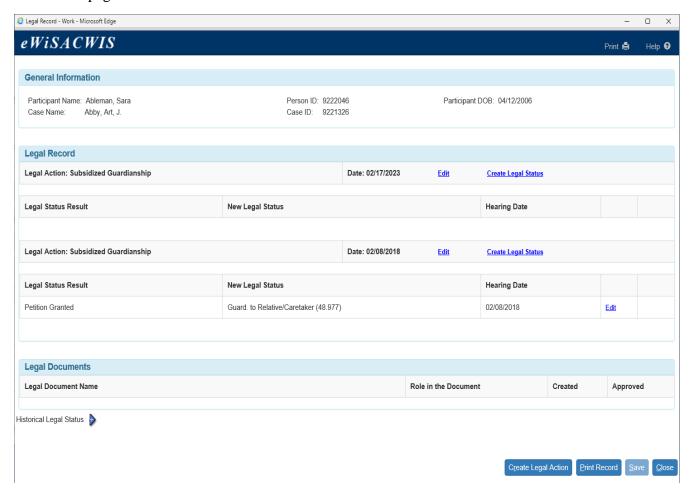
2. On the Legal Record page, click Create Legal Action.



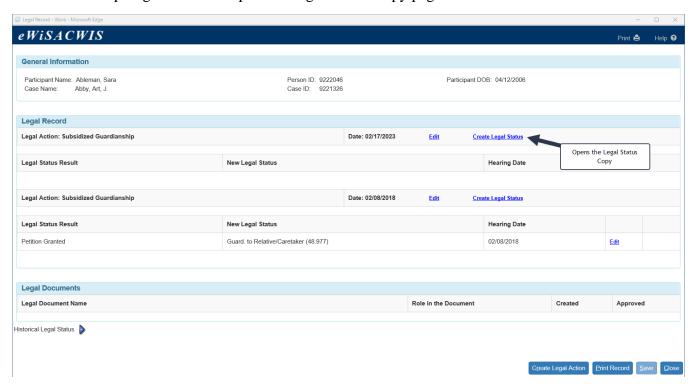
3. On the Legal Action Copy page, click Create to open a new Legal Action.



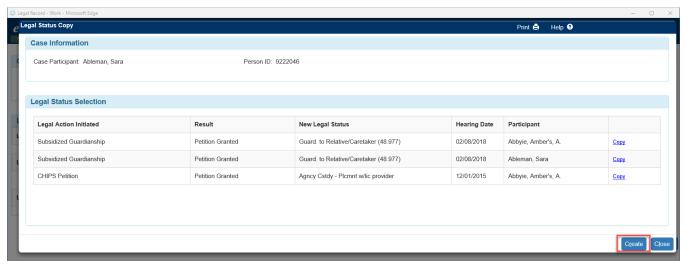
4. On the Legal Action page, enter data in the required fields. The Legal Action Initiated should be 'Subsidized Guardianship.' Click Save when complete. Click Close to be returned to the Legal Record page.



5. On the Legal Record page, click the <u>Create Legal Status</u> hyperlink next to the Subsidized Guardianship Legal Action to open the Legal Status Copy page.

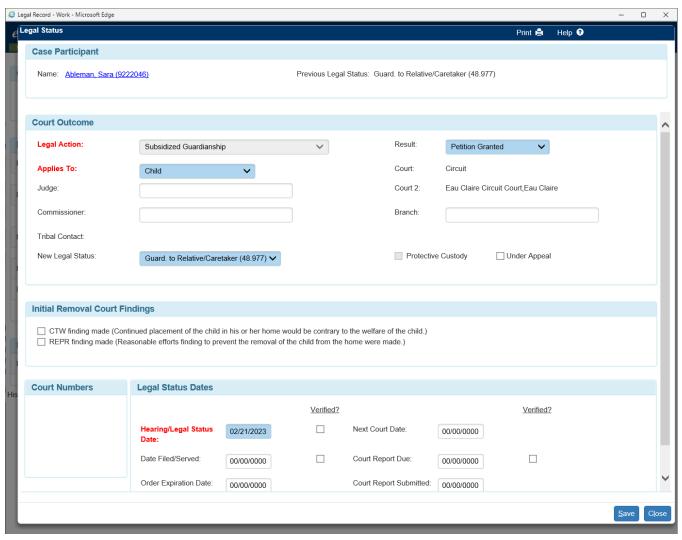


6. On the Legal Status Copy page, click Create.



7. Enter the required fields. The Legal Action should be 'Subsidized Guardianship,' the New Legal Status should be 'Guard. To Relative/Caretaker (48.977),' and the Result should be 'Petition Granted.' Click Save when completed. Click Close to return to the Legal Record page.

Note: The Hearing/Legal Status Date should be the heard date of the guardianship court order (when the judge made all the findings to appoint the child's guardian). If the judge states in the hearing that the guardianship court order won't be effective until the order is signed, this information is needed on the court order to reflect the delay from the heard date. This date becomes the effective start date of the subsidized guardianship service.



8. The Legal Record entry is now complete.



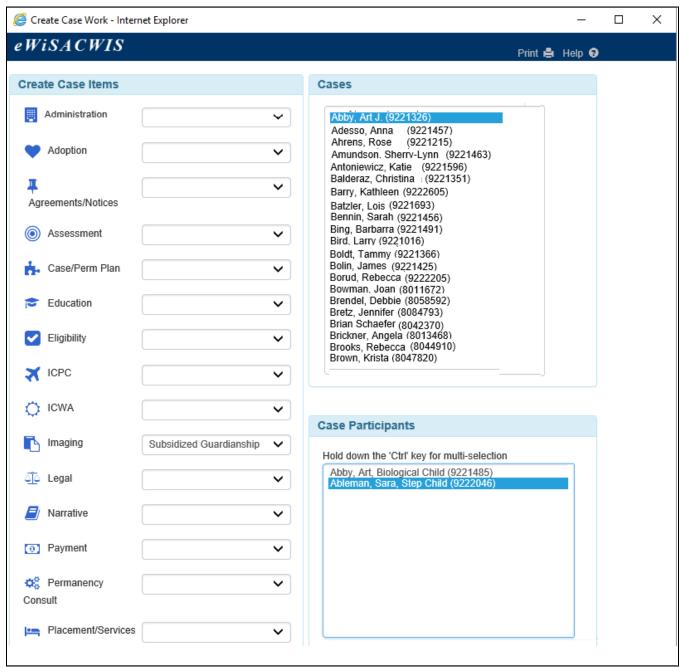
9. Click Close on the Legal Record page to return to the desktop.

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### **Creating Imaging Records for Subsidized Guardianship**

**Note:** The Imaging page can also be accessed via the desktop Menu>Utilities> Imaging Search page, which does not require an assignment to the case.

- 1. From the desktop, go to the Cases tab and click the Create Case Work hyperlink Oreate Case Work from the Actions drop-down next to the specific case to open the Create Case Work page.
- 2. On the Create Case Work page, select 'Subsidized Guardianship' from the Imaging drop-down. Select the Case and Participant (child with subsidized guardian). Click Create to open the Imaging page.

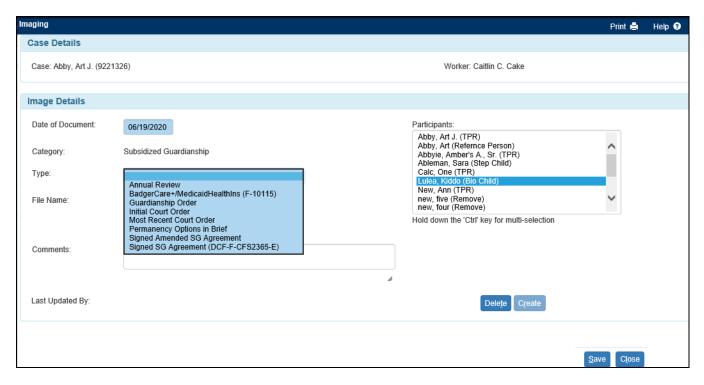


3. There are 6 required Subsidized Guardianship documents: BadgerCare+/Medicaid Health Insurance Form (F-10115), Guardianship Order, Initial Court Order, Most Recent Court Order, Permanency Options in Brief (DCF-F-2797), and Signed Subsidized Guardianship Agreement (DCF-F-CFS2365-E).

**Note:** The Initial Court Order is the order that initially granted removal of the child. Usually it is a TPC order, but it could also be a dispositional order, VPA, in-home to out-of-home change of placement order, or post-dispositional emergency change of placement order.

**Note:** The Most Recent Court Order is the document that granted placement and care of the child until it was terminated after the guardian was appointed, not the literal most recent court order. This is usually a dispositional order, extension order, or in-home to out-of-home change of placement order.

**Note:** For Subsidized Guardianship, the BadgerCare+/Medicaid Health Insurance Form (F-10115), Guardianship Order, Permanency Options in Brief, and Signed Subsidized Guardianship Agreement (DCF-F-CFS2365-E) imaging records must be created with a Date of Document that falls within the past 6 months prior to deactivating the child to create the Subsidized Guardianship case.





Approvers to complete the SG funding determination:

- 1. From the desktop, go to the Cases tab and click the Create Case Work hyperlink Oreate Case Work from the Actions drop-down next to the specific case to open the Create Case Work page.
- 2. On the Create Case Work page, select 'Legal Document' from the Imaging drop-down. Select the Case and Participant (child with subsidized guardian). Click Create to open the Imaging page.
- 3. Upload the Order Terminating Dispositional Order.

Note: The Order Terminating Dispositional Order is not a required document that has to be uploaded to deactivate the child if waiting for appeals or other scenarios. It is required for a SG funding determination to be made Federal.

Note: Terminate the child's Permanency Plan & Family Interaction Plan (FIP)

- Perm Plan: Reason Plan is no Longer Required Guardianship
- FIP: Reason Plan is no Longer Required (either Transfer of Guardianship Non-Relative or Transfer of Guardianship Relative)

### **Deactivating a Child Due to Subsidized Guardianship**



♠ View case information

**IMPORTANT: Do not** close the Out of Home Placement under the family case as this will prevent deactivation and not allow the Subsidized Guardianship case to be created. Overnight processing closes the Out of Home Placement.

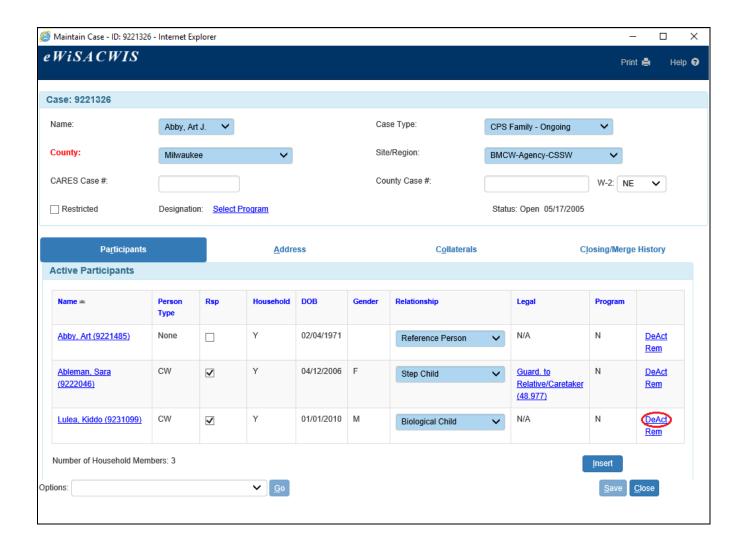
Note: If you learn at any time during the life of a Subsidized Guardianship case that the child has already or will move across state lines (either from or to Wisconsin or between two other states), update the address in the Provider Basic tab <u>and</u> send an email to <a href="https://docs.px/ldc.nc/by-nc-residences-res

1. From the desktop, click the family case name hyperlink to open the Maintain Case page.

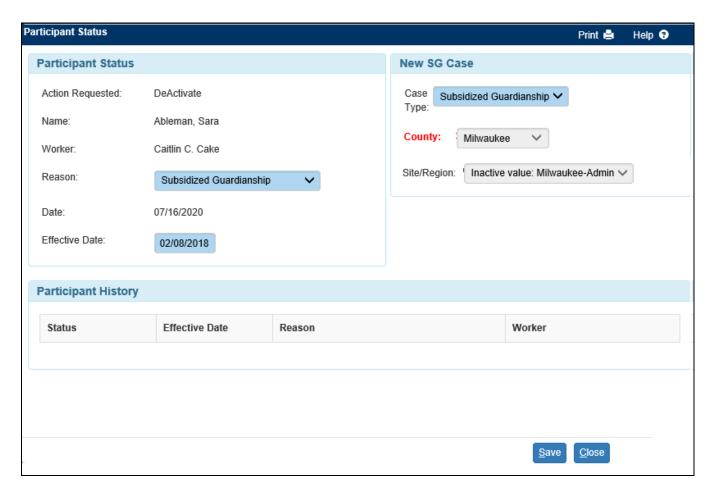
Abby, Art J. (9221326)			
Case details:	Case address:	Primary worker:	Actions:
CPS Family - Ongoing	111 Penntown Rd	Door, Supervisor (Supervisor)	Please select an action ▼
Milwaukee-Admin	Baraboo, WI 53913	Gyan.Ranjan@wisconsin.gov	
Open OHP exists for associated			
participant(s)			

2. Click the <u>DeAct</u> hyperlink for the child to be deactivated to open the Participant Status pop-up page.

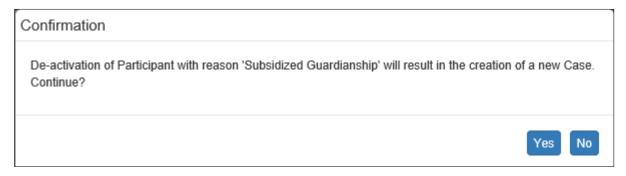
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3. On the Participant Status pop-page, select 'Subsidized Guardianship' from the Reason drop-down. The Effective Date field will prefill with the Hearing/Legal Status Date field entered on the Legal Status page and be the Begin Date for the Subsidized Guardianship service. Overnight eWiSACWIS processing ends the placement effective the date before the Subsidized Guardianship service begins.
Note: The overnight processing ends the placement to be the date before the Effective Date. This date should not be modified because it could cause placement end date issues that would result in more work to correct.



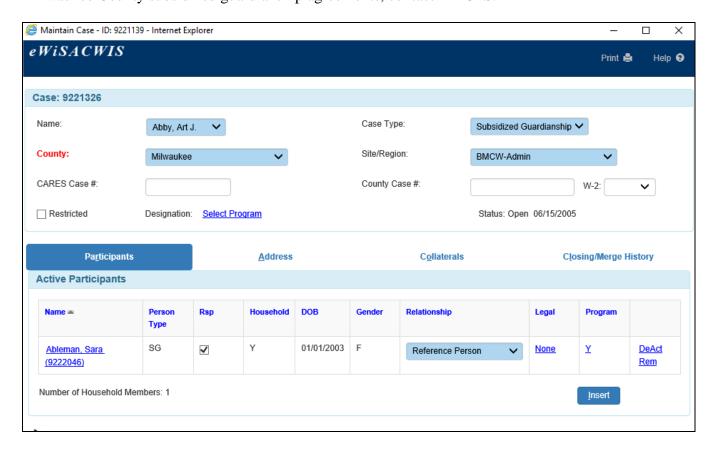
- 4. In the New SG Case group box, the Case Type, County, and Site/Region pre-fill from the Maintain Case page. Verify information is correct and click Save.
- 5. Once Save is clicked for the deactivation, the following pop-up message appears. Click Yes to continue to deactivate.



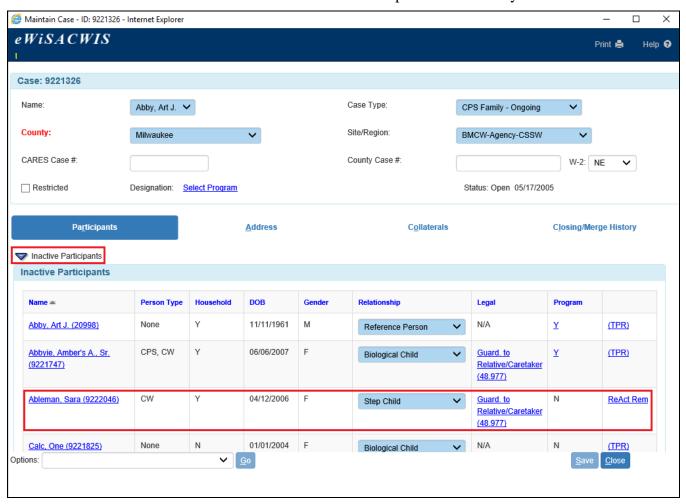
6. Clicking Yes runs a series of checks to make sure required work is completed and approved, no errors exist, etc. If any information is incomplete, an error message displays above the page. Correct the errors to deactivate the child.



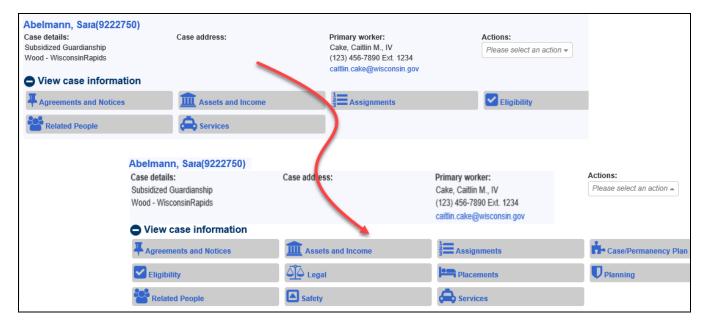
- 7. If no errors exist, clicking Yes will automatically create a new Subsidized Guardianship case for the child and immediately open the Maintain Case page. This process also automatically creates case assignment for the worker\* who deactivated the child. Click Close to return to the desktop.
- 8. While the Subsidized Guardianship case is created immediately after deactivation, information specific to the child does not copy over from the family case until eWiSACWIS overnight processing occurs. This processing also ends the Out of Home Placement in the biological family case and creates a Subsidized Guardianship Service in the Subsidized Guardianship case.
- \* Milwaukee Only: assignment is made to the State Subsidized Guardianship Default Worker. The email associated with this default account is not monitored. If you want to contact the individual maintaining Milwaukee County subsidized guardianship agreements, contact DMCPS.



9. The deactivated child is now listed under Inactive Participants on the family case.



10. Prior to overnight processing, access the Subsidized Guardianship case by refreshing the desktop and going to the new Subsidized Guardianship case. After overnight processing, information is populated in the Subsidized Guardianship case.



#### After the Subsidized Guardianship Case is Created

### Subsidized Guardianship Continued Eligibility and Related Notices and Decisions

After the Subsidized Guardianship case has been created, it is important to retain primary assignment\* to the case in order to receive case tasks related to continued eligibility. See the Subsidized Guardianship Continued Eligibility and Related Notices and Decisions user guide for more information.

\* Milwaukee Only: primary assignment is made to the State Subsidized Guardianship Default Worker. The email associated with this default account is not monitored. If you want to contact the individual maintaining Milwaukee County subsidized guardianship agreements, contact DMCPS.

### Subsidized Guardianship Amended Agreement

Guardians are eligible to request a Subsidized Guardianship Amended Agreement as early as 12 months after the initial agreement. See the Subsidized Guardianship Amended Agreement user guide for more information.

# Reopening a Subsidized Guardianship Agreement Ended in Error

Subsidized Guardianship Agreements ended in error may be reopened after termination. See the Reopening a Subsidized Guardianship Agreement Ended in Error user guide for more information.