

17 - Funding Determination

Suggestions to Instructor	Reference	Content
<p>Trainer should have covered Foster care funding power-point and referenced Funding IV-e eligibility job aid.</p>	<p>Funding Tab</p> <p>SMI 901.5 902 902.1 902.2 902.3 902.4 902.5 902.6 902.7 902.8 902.9 902.10 902.12 902.13</p>	<p style="text-align: center;">Funding Determination</p> <p>Please log in to SWSS. We've already looked at policy and procedure issues related to Funding eligibility and determination.</p> <p>It's time to look at the Funding Determination section of SWSS and determine funding eligibility and funding source for Daniel and Betty.</p> <p>Please go to Case Listing and select Daniel.</p> <p>Once you have Daniel, select the Funding Determination icon and wait for all of us to get there.</p> <p style="text-align: center;">Screen 1</p> <p>Screen 1 is your doorway into eligibility and funding determinations.</p> <p>From this screen you can:</p> <ul style="list-style-type: none"> • Select to do an Initial Determination (352) • Do a Redetermination (350)

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		<ul style="list-style-type: none"> • See a chronological list of the funding determinations and the results – Title IVE – yes or no • View details of previous determinations • Print documentation of your eligibility and funding determinations. • One valuable feature of this section of SWSS is the ability to save information without completing the entire section. <p>Remember how you can lose data if you leave a section before you've finished input of all of the data?</p> <p>The Funding Determination section will save what you've done and put a message on screen 1 under Type that you have a determination pending.</p> <ul style="list-style-type: none"> • You'll notice as we move through Funding Determination that the screen numbers sometimes are not sequential - numbers are skipped.

Suggestions to Instructor	Reference	Content
<p>Screen 3 - Specified Relative</p> <ul style="list-style-type: none"> □ Number of Group Members 6 □ Effective Month of Budget Prefills from petition date □ Did youth live with parent? Yes □ Choose person youth lived with Mary BP 		<p>The screens being skipped is the same as your only completing certain parts of the 352 depending on living arrangements or deprivation factors.</p> <p style="text-align: center;">Screen 3 - Specified Relative</p> <p>Notice that we have already skipped screen 2 - we'll go back and look at screen 2 when we finish Daniel's determination.</p> <ul style="list-style-type: none"> • Number of Group Members- Help Command Button <p>In Daniel's case - living with one parent:</p> <p>The group size for Daniel is 6 --</p> <ol style="list-style-type: none"> 1. Daniel 2. Mary (Mom) 3. Carla (Sister) 4. Alan (Brother) 5. Betty (Half-sister) 6. Edd (Nephew) <ul style="list-style-type: none"> • Effective month of budget – this is the month of the petition – it prefills with the month of the petition based on entries in SWSS Legal. This is a correctable field.

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		<ul style="list-style-type: none">• Living with Responsible relative – “yes” was living with Mom – notice it is pre-filled to yes.• Now SWSS wants to know specifically who – a pick list of all of the members is provided – highlight / select Mom / Mary

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<p style="text-align: center;">Screen 4</p> <ul style="list-style-type: none"> □ Do you want to do Former ADC Eligibility Yes □ Youth receiving SSI? No 		<p style="text-align: center;">Screen 4 ADC Determ., SSI and Living with Status</p> <ul style="list-style-type: none"> • Eligibility for former ADC – “yes” This is the equivalent of the old 351 <p>NOTE: Just like on the DHS 351, if there are obvious reasons that the family would not be eligible for the former ADC – you select “No” – and fill in the reason; i.e. no deprivation. You will then skip to Screen 13 – just like you skip sections of the DHS 351.</p> <ul style="list-style-type: none"> • SSI – Daniel is not receiving SSI – “no” (Demo clicking on yes) • Living Arrangement – pre-filled with “Youth living with one parent”

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<p style="text-align: center;">Screen 5 - Deprivation</p> <ul style="list-style-type: none"> □ Parent Name County/city, Mary □ Primary reason for absence Defaults to separation □ Absent Parent □ Choose name from list 		<p style="text-align: center;">Screen 5 - Deprivation</p> <ul style="list-style-type: none"> • Continue to screen 5 <ul style="list-style-type: none"> a 1. Pick list for parent child living with – select Mary 2. Reason for parental absence – select “single/unmarried” • Absent Parent – father is pre-filled – use pick list to select Frank Smith - BP <p style="text-align: center;">Screens 6 – 8</p> <p>Notice that we have jumped from screen 5 to screen 9.</p> <p>Screens 6 through 8 deal with other living arrangements, such as living with both parents or living with a relative.</p> <p>Instead of Screen 5 we would have seen:</p> <ul style="list-style-type: none"> • Screens 6 and 8 if Daniel was living with both parents and unemployment of a parent were possible deprivation

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<p style="text-align: center;">Screen 9 -- Property</p> <ul style="list-style-type: none"> □ Primary Vehicle \$200 □ Vehicle^{2,3,4} □ Real Estate □ Social Security □ Trust Funds □ Savings/Checking Accts \$25 □ Cash \$10 □ Stocks/bonds □ Life Insurance □ Motorcycles, Boats, etc □ Other (specify) 		<ul style="list-style-type: none"> • Screen 7 if Daniel had been living with a relative - like Grandma Elsie <p style="text-align: center;">Screen 9 -- Property</p> <ul style="list-style-type: none"> • Enter data • Highlight <ul style="list-style-type: none"> ➤ pop up fields ➤ SWSS runs a total on assets at the bottom of the screen <p style="padding-left: 40px;">Note: Tab after last asset entry and the total displays</p> <p style="text-align: center;">Screen 10 - Earned Income</p> <p>This screen gives us a lot of information --</p> <ul style="list-style-type: none"> • Whose income needs to be considered • List of possible family members

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<p>Screen 10 - Earned Income</p> <ul style="list-style-type: none"> □ Add or Change Members earned income Mary □ Check Date 1st of the budget month □ Amount \$75 □ Check Date 8th of the budget month □ Amount \$100 □ Check Date 16th of the budget month □ Amount \$50 □ Check Date □ Amount □ Check Date □ Amount □ Member receive FIP in last 4 months? Yes □ Day Care Expenses? 		<ul style="list-style-type: none"> • The fact that SWSS will do the math behind the scenes -- you don't need to worry about income disregards, adding, subtracting or any of that stuff. <u>Entering Income</u> <p>Since Mary works we have some income to enter --</p> <ul style="list-style-type: none"> • Highlight Mary • Select [Add or Change Member's Earned Income Details] <p>Notice that a panel pops open and lays on top of Screen 10 -</p> <p>You can still see the bottom of Screen 10 (Trainer - try to click on the Day Care question to demonstrate that it is on the bottom layer - can't access until income panel closes)</p> <ul style="list-style-type: none"> • Enter Mary's income information <p>You can easily tab through the fields</p> <ul style="list-style-type: none"> • Return to Screen 10 (OK) and answer Day Care question

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Defaults to No		(Trainer-- although no day care costs - select "yes" to quickly look at the screen again and then back out)
Screen 11 Day Care Expenses		Screen 11 - Day Care Expenses
None		Just a quick look
Screen 12 - Unearned Income		Screen 12 - Unearned Income
No Income		<ul style="list-style-type: none"> • This screen looks at the unearned income and any child support being paid by a family member. <p>The fields in this screen work the same as the asset screens giving you pop-up fields if you select any boxes.</p> <ul style="list-style-type: none"> • Mary doesn't have any unearned income nor did she pay any child support.
		Screen 13 -- Outcome of Eligibility for Former ADC
		This screen gives you a result for each eligibility factor for the Former ADC program and the final outcome - where they

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		<p>eligible or not:</p> <ul style="list-style-type: none"> • Deprivation Factor • Income Limit • Property Limit • Former ADC eligibility results <p>Mary would have been eligible</p> <p>This ends the family part of the eligibility determination - the next screens will look at the funding for the child/youth.</p> <p>The screens for the child/youth are the same screens seen when doing a redetermination.</p> <p>Are there any questions about on this portion of SWSS Funding Determination?</p>

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		<p style="text-align: center;">Screen 14</p> <p>As you can see we have jumped a screen again – from 13 to 15.</p> <p>Screen 14 is a pop-up screen that you will get if you want to add or change any member asset or income information.</p> <p style="text-align: center;">Screen 15</p> <p>As you can see, screen 15 is a summary of the child/youth's legal status and court order.</p> <p>Remember on the 352 having to check which legal status described the child's situation?</p> <p>SWSS even captures the letter from the listing - d.(The court order) Requires the Agency to provide placement and care for a temporary (neglect) court ward.</p>

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<p><input type="checkbox"/> Youth have income available? No</p> <p style="text-align: center;">Screen 18 Government Benefit Info.</p> <p><input type="checkbox"/> Receiving, potentially eligible or previously receiving govt. benefits? No</p> <p><input type="checkbox"/> Physical, mental or emotional impairment? NO</p>		<p>This information is all brought in from the Legal section.</p> <p style="text-align: center;">Screen 17 - Unearned Income of Youth</p> <p>Trainer -- just click around on the screen quickly showing different messages and pop up fields. Leave the screen with no income.</p> <p style="text-align: center;">Screen 18 - Government Benefit Info.</p> <p>Trainer -- just click around on the screen quickly showing different messages and pop up fields. Leave the screen with no income.</p>

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<p style="text-align: center;">Screen 19 Financial Info/Property</p> <ul style="list-style-type: none"> □ Youth have property available? No □ Trust Funds No □ Where is youth placed? Licensed foster care 		<p style="text-align: center;">Screen 19 - Financial Info/Property</p> <p>Trainer -- just click around on the screen quickly showing different messages and pop up fields. Leave the screen with no income.</p> <p style="text-align: center;">Screen 20 - Title IVE Determination</p> <p>SWSS now has all of the information needed to decide if Daniel is eligible for Title IVE funding.</p> <p>Now SWSS needs to know if Daniel is placed in a Title IVE eligible placement.</p> <p>We are going to place him in a licensed foster home Trainer: (select placement from picklist)</p> <p style="text-align: center;">Screen 21 - Court Order Specifics</p> <p>SWSS has now reviewed the court order for the necessary language :</p>

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		<ul style="list-style-type: none"> • Reasonable Efforts • Continuation in Home • Out of Home Placement or Level of Security <p>Time to see what Daniel's eligibility and funding source are.</p> <p style="text-align: center;">Screen 22 - Eligibility for Title IVE Funding</p> <p>Daniel is IVE eligible -- so is the order and the placement - so he will be funded by Title IVE funds.</p> <p style="text-align: center;">Generate Reports</p> <p>We are not going to print any reports but let's take a look at what is available.</p> <ul style="list-style-type: none"> • Select [Generate Reports] • Reports that could be printed - what is checked off is what will print <p style="margin-left: 40px;">➤ DHS 352</p>

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		<ul style="list-style-type: none">➤ DHS 350 -- grayed out at this time because the determination completed is initial -- will be enabled when a redetermination is completed ➤ DHS 3205 - Gov. Benefit form ➤ DHS 176 Client Notice • Cancel out of screen - no printing Daniel's initial determination is complete - let's go back to the Funding Main Screen • Select [Funding Main Screen] <p style="text-align: center;">Screen 2</p><p>Remember screen 2 that we skipped - let's go find it.</p>• Select [View] <p>Screen 2 is a set of tabbed panels that gives you a chance to look at a determination. Just click on the tabs to view the panel.</p>

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<p>Caution – tell trainees to watch – not to follow or they will have to click back through the entire initial funding piece.</p>		<p>As a case ages, you will have several determinations listed.</p> <p>Highlight the determination you want to view and then click on [View].</p> <ul style="list-style-type: none"> • Initial Determination features <ul style="list-style-type: none"> ➤ Within the first 30 days you can make changes to the initial Determination - the date completed will change to the update date. ➤ After 30 days but before the end of the 5th month, you can still make changes to the Initial Determination through Corrections Mode. The date completed will not change. • Caution Scenario -- <p>During the first 30 days you decide you want to take a look at your Initial Determination.</p> <p>So you click on Initial Determination button and start clicking through the screens - part way through you find the information you want so you cancel out.</p>

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Trainer needs to enter data in Betty's case.		<p>You notice that the Initial Determination is now showing as pending rather than complete.</p> <p>Remember - funding saves data as it goes. SWSS thought once you got past screen 3 that you were in the Initial Determination to update or make changes, so it pended the determination.</p> <p>If you do this, you need to click through all of the screens to the end.</p> <p>Best to use [View] and avoid the situation altogether.</p> <p>Do you have any questions about the Funding Determination?</p> <p>Time for you to do Betty's Determination - The information you need is in Betty's outline.</p>

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<p style="text-align: center;">Data for Betty's Funding</p> <p style="text-align: center;">Screen 3</p> <ul style="list-style-type: none"> <input type="checkbox"/> Number of Group Members 6 <input type="checkbox"/> Effective Month of Budget Prefills from petition date – should be 7/20/2000 <input type="checkbox"/> Did youth live with parent? Yes <input type="checkbox"/> Choose person youth lived with Mary <p style="text-align: center;">Screen 4</p> <ul style="list-style-type: none"> <input type="checkbox"/> Do you want to do Former ADC Eligibility Yes <input type="checkbox"/> Youth receiving SSI? No <p style="text-align: center;">Screen 5 - Deprivation</p> <ul style="list-style-type: none"> <input type="checkbox"/> Parent Name County/city, Mary 		

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<ul style="list-style-type: none"> □ Primary reason for absence Divorced □ Absent Parent Father □ Choose name from list John Screen 9 - Property □ Primary Vehicle \$200 □ Vehicle 2,3,4 □ Real Estate □ Social Security □ Trust Funds □ Savings/Checking Accts \$25 □ Cash \$10 □ Stocks/bonds □ Life Insurance □ Motorcycles, Boats, etc □ Other (specify) Screen 10 – Earned Income □ Add or Change Members earned income Mary □ Check Date 1st of the budget month 		

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<ul style="list-style-type: none"> <input type="checkbox"/> Amount \$75 <input type="checkbox"/> Check Date 8th of the budget month <input type="checkbox"/> Amount \$100 <input type="checkbox"/> Check Date 16th of the budget month <input type="checkbox"/> Amount \$50 <input type="checkbox"/> Check Date <input type="checkbox"/> Amount <input type="checkbox"/> Check Date <input type="checkbox"/> Amount <input type="checkbox"/> Member receive FIP in last 4 months? Yes <input type="checkbox"/> Day Care Expenses? Yes Screen 11 Day Care Expenses <input type="checkbox"/> # children under 2 1 <input type="checkbox"/> # children 2-14 <input type="checkbox"/> day care expenses for children under 2 \$150 <input type="checkbox"/> day care expenses for children 2-14 		

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Screen 12 – Unearned Income		
None		
<p style="text-align: center;">Screen 17 Unearned Income of Youth</p>		
None		
Screen 18 – Govt. Benefit Info		
None		
<p style="text-align: center;">Screen 19 Financial Info/Property</p>		
None		
<p style="text-align: center;">Screen 20 Title IVE Determination</p>		
Licensed foster home		