 <p>Children's Services Agency</p> <p>Communication Issuance</p> <p>17-017</p>	Subject/Title Assignment of Adoption Subsidy Cases & Changes to the Adoption Process Flow MiSACWIS Job Aid
	Type <input checked="" type="checkbox"/> Informational Memorandum <input type="checkbox"/> Program Instruction <input type="checkbox"/> Policy Guide
	Issuance Date 1/30/17 Obsolete Date n/a
	Contact Name Kerrie Uphaus Email MiSACWIS@michigan.gov Phone 517-284-9688
	Due Date n/a Due to n/a
	Distribution <input checked="" type="checkbox"/> CSA Central Office Managers/Staff <input checked="" type="checkbox"/> MDHHS BSC and County Directors <input checked="" type="checkbox"/> MDHHS Juvenile Justice Managers/Staff <input checked="" type="checkbox"/> MDHHS Child Welfare Managers/Staff <input type="checkbox"/> Native American Tribes <input type="checkbox"/> Office of Workforce Development and Training <input checked="" type="checkbox"/> Private Agency Child Welfare Managers/Staff <input checked="" type="checkbox"/> Private Residential Abuse/Neglect Managers/Staff <input type="checkbox"/> Private Residential Juvenile Justice Managers/Staff <input type="checkbox"/> Other:

Adoption Subsidy Supervisor Assignment

An adoption subsidy supervisor needs to be assigned to a permanent ward case in MiSACWIS. Then, the adoption subsidy supervisor will assign the case to an adoption subsidy worker.

Prior to the creation of the new Person ID, the private agency adoption supervisor must assign Erin Setla to the Permanent Ward case. The attached *Adoption Process Flow* job aid has been revised to include this step, reference step 21 in Attachment A.

Additional Updates to the Adoption Process Flow Job Aid

In conjunction with adoption policy, the MiSACWIS field support team has made the following updates to the job aid:

- At the bottom of page 2, added a note to ensure adoption payments are disbursed correctly. The note states: "The Provider Name and the member identified as the Primary Provider on the provider record must match in order for subsidy payments to be disbursed. If they do not match, then the subsidy payment will not generate."
- On page 4, step 13, added information to clarify MCI consent routing. The highlighted text reflects the updates.

13. Add the MCI Request on the MCI Consent screen – Adoption Worker.

- a. Submit and upload documents for MCI Consent Packet on the MCI Requests Screen.^[1] In addition, documents for Competing Party Consent Requests need to be mailed directly to the MCI office.
 - b. Route to the MCI office or to the delegated MDHHS county director (per ADM 850).^[2]
 - c. If being routed to the MCI office, consent requests should be routed as follows:
 1. All regular consent packets should be routed directly to Katie McClain, who will assign them to either Jim Lewis or Deborah Palaszek (therefore, do not fill in the name of the signer on the PCA 309).
 2. All competing party packets should be routed directly to Carita Fox.
 3. All expedited consent packets (that cannot be routed to the delegated MDHHS local county director) should be routed directly to Mary Rossman.
- On pages 11 and 12, updated the flow chart. The updates indicate that the adoption worker must add the adoption placement prior to the entry of the PCA 320 Adoption court order.

The revised job aid has been posted to the MiSACWIS Communications Website under the Adoption hyperlink.

^[2] Do not route the packet until all required information is complete. The adoption worker/supervisor is not able to access the consent information after it is routed. Finally, the date in the 'Sent to MCI' column on the Family Consideration tab is populating when the MCI/county director approves the consent, rather than when the supervisor routes it to the MCI; a change control has been entered to fix this functionality. Reference the *JA MCI Consent Revised* job aid.

> Adoption Subsidy/Finalization of Adoption Process Flow

This job aid outlines the adoption process flow, including subsidy and finalizing/sealing an adoption case in MiSACWIS. For a simpler, visual representation, please see the swim lane diagram beginning on page 9. The *MiSACWIS Suggested Workflow for Adoption* job aid contains additional navigational information for adoption cases.



Note

This document assumes that the adoption worker and supervisor are with a private agency. The MDHHS worker is specified in the document where applicable. The foster care worker/supervisor could be a private agency or a MDHHS worker/supervisor.

1. Enter and upload the Terminate of Parental Rights (JC 63) court order – MDHHS Child Welfare Funding Specialist (CWFS).¹
2. Create the Permanent Ward case – Foster Care Worker.



Note

When the selected child is moved to a Permanent Ward case, the Foster Care program type will be end dated in the Ongoing case. The Ongoing case will need to be administratively closed after all children within the case are moved to a Permanent Ward case.

3. The foster care worker must provide a referral packet to MDHHS or the contracted adoption agency adoption worker, within 5 working days from the date of the receipt of the order terminating parental rights – Foster Care Worker.

The following are requirements of completing an adoption referral:

- a. Refer the case to a MDHHS or private agency in MiSACWIS – Foster Care Supervisor.
 - b. Complete the Individual Service Agreement (DHS-3600) per policy requirements – MDHHS Foster Care Worker (if applicable).
 - c. Upload the adoption referral packet to the Permanent Ward case. There is a document hyperlink available from the Case Overview page – Foster Care Worker.
 - d. Add referral date on the Adoption Case Details screen (BOTH private agency and MDHHS MUST add the referral date - referral date entered must match the date on the DHS-3600) – Foster Care Supervisor.²
 - e. Assign the case to the adoption supervisor – Foster Care Supervisor.
4. **Within seven working days of receipt of the adoption referral from foster care, the adoption referral must be accepted or rejected – Adoption Supervisor.**

¹ Reference the *MiSACWIS Adoption Orders* job aid.

² MiSACWIS does not track the history of adoption referrals. If there are multiple agencies to which MDHHS has made a referral, the foster care worker or supervisor should add a social work contact to record the dates of the referrals and the agency.

> Adoption Subsidy/Finalization of Adoption Process Flow

- a. The rejection of a referral must include a detailed explanation of the reason(s) for rejection.
 - b. For an accepted referral, add acceptance date on the Adoption Case Details screen and assign the case to an adoption worker within three working days – Adoption Supervisor.
5. Complete child adoption assessment in MiSACWIS per policy – Adoption Worker.³



Note

The user must be assigned to the case with an assignment role of “Adoption Worker” or s/he will not be able to complete the adoption assessments. Quarterly Reports need to be completed 90 days following the completion of the Child Adoption Assessment and every 90 days until the PCA 320 is signed. In addition, the completion of the Supervisory Report (DHS 613) must be completed every quarter following the issuance of the PCA 320. Supervisory reports are to be completed every quarter until PCA 321 is issued.

6. Add Adoption Provider Inquiry – Adoption Worker⁴:
- a. Search for existing provider record using the Directory search function⁵ – select the existing provider:
 1. Who is enrolled in Bridges and the enrolled provider will also be the enrolled provider for the adoption subsidy.⁶
 2. Who has an SSN?



Note

The **Provider Name** and the member identified as the **Primary Provider** on the provider record must match in order for subsidy payments to be disbursed. If they do not match, then the subsidy payment will not generate.

³ Prior to completing the adoption assessments and other activities, the adoption worker should ensure that the duplicate member records for the child have been deactivated. The *Deactivating Duplicate Case Member* job aid contains the procedures for identifying the correct member record to maintain, along with the procedures for deactivating the other records. In addition, all reports need to be generated and saved after the supervisor’s approval.

⁴ Reference the *Adding Additional Provider Type to an Existing Provider* job aid and the *Complete a Provider Inquiry* web-based training (WBT) in Omni Track Plus (OTP).

⁵ If the current placement provider is adopting the child, the user can view the provider’s information on the child’s placement.

⁶ If the provider is enrolled in Bridges, s/he will have a Bridges Provider ID. The Bridges ID is displayed for the provider record on the Basic tab. Use this information to determine whether the existing MiSACWIS provider record should be updated or a new MiSACWIS provider record created. Bridges enrollment is based on a person, not on the participants in the provider home. The enrolled provider in Bridges determines the provider name in MiSACWIS.

> Adoption Subsidy/Finalization of Adoption Process Flow

- b. Add “Adoptive Parent”⁷ provider type if the existing provider does not already have this type.⁸
- c. **Assign the existing provider to the adoption worker – Adoption Supervisor.**



Note

If necessary, the private agency must contact the MDHHS POS monitor to determine to which agency the existing provider is assigned.

- d. Create a new adoption provider with the “Adoptive Parent” provider type, if there is no existing provider record – Adoption Worker.
 - e. **MiSACWIS will assign the new provider to the adoption supervisor.**
 - f. **Link the inquiry – Adoption Supervisor.**
7. Complete the home evaluation
- a. If the adoptive parent is not an active “Adoptive Parent” provider, and the Initial-Unlicensed provider home evaluation (BCAL-3130) for licensure did **not** indicate preliminary approved for adoption:
 1. Complete the Preliminary Adoptive Assessment (DHS-1926), if necessary per policy – Adoption Worker.
 2. Complete the BCAL-3130, if needed – Adoption Worker.⁹
 3. **Complete the approval process for the BCAL-3130 – Adoption Supervisor.**



Note

With the MiSACWIS 15.3.E1 release on March 14, 2015, the home evaluations are approved via the approval process in MiSACWIS.

4. Complete the Adoptive Family Assessment Addendum (DHS-612) – Adoption Worker.
 5. **Complete the approval process for the DHS-612 – Adoption Supervisor.**
- b. If a licensing worker completed the BCAL-3130 and the provider was “Preliminary approved for adoption”:
 1. Complete the Adoptive Family Assessment Addendum (DHS-612) – Adoption Worker.
 2. **Complete the approval process for the DHS-612 – Adoption Supervisor.**

⁷ **Do** not select a provider who only has a provider type of “daycare” or a provider whose name appears with two first names, e.g., Jim & Sue” – this is a converted provider record.

⁸ Do not select “Private Adoptive Home” for the provider type.

⁹ Reference the *JA BCAL 3130 Home Evaluation* job aid and the *Record a Home Evaluation* WBT.

> Adoption Subsidy/Finalization of Adoption Process Flow

8. Create a subsidy record from the Subsidy Tab¹⁰ – Adoption Worker.¹¹
 - a. Add the subsidy application.
 - b. Upload the packet in the documents link.
 - c. Notify the Adoption & Guardianship Assistance Office at MDHHS-AGAO-apps-and-openings@michigan.gov



Note

If the adoptive family does not want adoption assistance, select *Not Requesting* and upload the DHS-4081. The subsidy record MUST be created or the system will present an error message when trying to create the new person ID. Any subsidy record other than *Not Requesting* needs to be determined or created in error. ALL Subsidy Records must be either Not Requesting, determined or created in error. Notify Adoption & Guardianship Assistance office at MDHHS-AGAO-apps-and-openings@michigan.gov.

9. Determine subsidy eligibility – Adoption Assistance Analyst.
10. If necessary, enroll the new Provider ID in Bridges – Adoption Assistance Analyst.
11. Enter recruitment activity (if applicable) – Adoption Worker.
12. Enter Family Consideration information before number 13¹² – Adoption Worker.



Note

Only one family can be “Recommended” and another family can be the second choice.

13. Add the MCI Request on the MCI Consent screen – Adoption Worker.
 - a. Submit and upload documents for MCI Consent Packet on the MCI Requests Screen.¹³ In addition, documents for Competing Party Consent Requests need to be mailed directly to the MCI office.
 - b. Route to the MCI office or to the delegated MDHHS county director (per ADM 850).¹⁴
 - c. If being routed to the MCI office, consent requests should be routed as follows:

¹⁰ To access the Subsidy History screen: Case Overview > Adoption Case Details > Member tab > Member Details hyperlink > Subsidy tab.

¹¹ Reference CI 14-102 *Adoption & Guardianship Subsidy Forms*, the *Creating Subsidy Application Shell* job aid and the associated video at: <http://youtu.be/beejFVV9GN4>

¹² Do not complete the adoption matching in MiSACWIS. This is not operational.

¹³ Do not scan and upload the consent packet as one large document. The individual documents should be uploaded separately, and named according to the document title. Reference CI 14-164, *MCI Consent Packets*.

¹⁴ Do not route the packet until all required information is complete. The adoption worker/supervisor is not able to access the consent information after it is routed. Finally, the date in the ‘Sent to MCI’ column on the Family Consideration tab is populating when the MCI/county director approves the consent, rather than when the supervisor routes it to the MCI; a change control has been entered to fix this functionality. Reference the *JA MCI Consent Revised* job aid.

> Adoption Subsidy/Finalization of Adoption Process Flow

1. All regular consent packets should be routed directly to Katie McClain, who will assign them to either Jim Lewis or Deborah Palaszek (therefore, do not fill in the name of the signer on the PCA 309).
2. All competing party packets should be routed directly to Carita Fox.
3. All expedited consent packets (that cannot be routed to the delegated MDHHS local county director) should be routed directly to Mary Rossman.



Note

MCI consents cannot be approved in the system if the Consent Decision field is left blank. Only MDHHS county directors and/or MCI can approve Expedited consents and **only** MCI will be able to approve all other non-Expedited types of consent requests.

MiSACWIS does not generate a tickler or notification when the adoption consent is approved or denied. The adoption worker can check on the status of the consent by reviewing the MCI Consent Screen.

If consent is granted, the MCI Superintendent or the authorized county director will sign the PCA-309, Consent to Adopt by Agency/Court. If the adoption consent is denied, the MCI Superintendent will sign the Consent to Adoption MCI Decision (DHS-883) form. The adoption worker must scan a copy of the signed and notarized copy of the PCA-309 or DHS-883 into MiSACWIS MCI Consent Shell for the specific child.

14. Enter and upload the Petition to Adopt – CWFS. Court orders need to be uploaded in the Court section.
15. Change placement to Adoptive Parent placement **ONLY** when the PCA 320 has been received from the court. The Placement Begin Date will be the date on PCA 320 – Adoption Worker.
16. Enter and upload the Order of Placing (PCA 320) and Order Terminating Parental Rights after Release or Consent (PCA 318) – Private Agency Adoption Supervisor or CWFS.¹⁵ Court orders need to be uploaded in the Court section.



Note

If there are siblings on the case, which require their own Permanent Ward case(s), **DO NOT** update the Legal Status to a 43 until the new Permanent Ward case(s) is created.

17. All foster care documentation must be completed – Foster Care Worker.

¹⁵ Reference the *Adding Adoption Court Orders* job aid. With the MiSACWIS 15.2.1 February Release, private agency adoption supervisors are now able to add the PCA 318, the PCA 320 and the PCA 321 court orders. Only the CWFS worker can change the child's legal status.

> Adoption Subsidy/Finalization of Adoption Process Flow

18. Close the foster care program – Foster Care Worker.
19. For each child being adopted on the permanent ward case, create a separate permanent ward case for each child – Adoption Worker.



Note

The PCA 320 must be entered and the foster care case closed before the new permanent ward case can be created. Child must have an active, un-end dated 44 legal status; **the legal status cannot be 43 if the worker is moving the child to his/her own permanent ward case.** Each adopted child MUST have their own permanent ward case even if they are siblings being adopted together.

20. The custody episode is not ended before adding the legal status 43, the custody episode is not ended until a child has a legal status of 97.



Note

When the CWFS worker enters the legal status 43, MiSACWIS will send information to Bridges to close the FCDW Medicaid. Once the Adoption & Guardianship Assistance office staff completes the opening paperwork for adoption, MiSACWIS will send the ASDW Medicaid referral to Bridges under the new child ID/RID.

21. **Prior to the creation of the New Person ID, the Private Agency Adoption Supervisor will need to assign Erin Setla to the Permanent Ward case.**
22. Through Adoption Finalization & Case Closure, enter new person information and route for approval – Adoption Worker.¹⁶



Note

Do not enter a SSN in the Child's Adoptive Information grid unless the SSN is different from the SSN displayed in the Child's Pre-Adoptive Information grid.

23. **Approve the new person record, this action creates the new person ID/RID – Adoption Supervisor.**



Note

The New Person ID number will display **ONE TIME** at the top of the screen when the new person record is approved.

24. Move the SSN from the child's previous Child ID to the new ID if his/her SSN is not changing – Adoption Worker.
25. If necessary, upload the subsidy opening paperwork on the Subsidy tab; notify the Adoption & Guardianship Assistance Office of the new and old Person IDs/RIDs at MDHHS-AGAO-apps-and-openings@michigan.gov – Adoption Worker.

¹⁶ Reference the *Create New Person Adoption Case* job aid and associated video at: <http://youtu.be/fbi926Snt70>

> Adoption Subsidy/Finalization of Adoption Process Flow



Note

Adoption and Guardianship Assistance office cannot open the assistance case until the new child ID is created, and the private agency adoption supervisor or the CWFS worker has entered the PCA 320.

26. Enter and upload the Order of Adoption (PCA 321)¹⁷ – Private agency adoption supervisor or CWFS. Court orders need to be uploaded in the Court section.



Note

Do not enter a court order type of “Dismissal of Jurisdiction.”

27. Change the legal status to 97 Adoption Subsidy and end the custody episode.¹⁸
28. Upload all necessary court orders, along with the notarized and signed PCA 309 to the shell adoption subsidy case – Adoption Worker.
29. Sealing/closure of adoption case¹⁹:
 - a. Complete the **Adoption Finalization Details** screen – Adoption Worker.
 - b. **“Task Review and Route” to MDHHS adoption monitor’s supervisor through the Approval to Seal Child Record – Adoption Supervisor.**
 - c. Approve sealing of adoption case and notify the adoption worker to print closing summary using the report hyperlink on the Adoption Finalization Information panel – MDHHS Supervisor.
 - d. **Print the Adoption Closing Summary – Adoption Worker.**



Note

The Adoption Closing Summary Report does not contain the Commitment Date. The adoption worker must write in the commitment date and scan the finalized, signed document in MiSACWIS.

- e. **Approve closure through Validate Adoption Program Closure*** – MDHHS Supervisor.

¹⁷ If a tribal court is finalizing the adoption, the CWFS worker must still enter the court orders as the equivalent order type in MiSACWIS, e.g., enter the PCA 320 for order placing and the PCA 321 for a final order of adoption.

¹⁸ The legal status needs to be changed to 97 even if the child is not receiving adoption subsidy. This legal status is found in the Services list after selecting the Legal Status Type.

¹⁹ Reference the new *Sealing and Closing an Adoption Case* job aid. Do not administratively close the adoption case as this will not properly seal the adoption case. Moreover, do not use the Case Closure left-hand navigation hyperlink to close the adoption case unless the worker wants the permanent ward case to remain open, such as when the adoption is disrupted or there is an adoption dissolution. This closure hyperlink should be used when closing the adoption program type but the case is not closing.



Note

A request to open ASDW Medicaid for the Adopted child on the new person ID will be sent to Bridges when the PCA 320 Court Order is entered and the child has a Legal Status of 43.

Frequently Asked Questions

Q: Does an initial BCAL 3130 have to be completed in MiSACWIS to activate the adoption parent provider in MiSACWIS?

A: If the adoptive parent is not an active “Adoptive Parent” provider and the initial BCAL-3130 for licensure did not indicate preliminary approved for adoption, the adoption worker must complete the BCAL- 3130 for the adoptive parent provider type. The supervisor approves the BCAL-3130 with a “Recommendation of approval.” If a licensing worker completed the BCAL-3130 and the provider was, “Preliminary approved for adoption,” the adoption worker must complete the Adoptive Family Assessment Addendum (DHS-612). The supervisor will approve the DHS-612 with a “Recommendation of approval.” Once the provider home evaluation is “approved,” the adoption provider will become active in MiSACWIS.

Q: Does MiSACWIS require the adoption worker to complete the BCAL- 3130 and the Adoptive Family Assessment Addendum (DHS-612)?

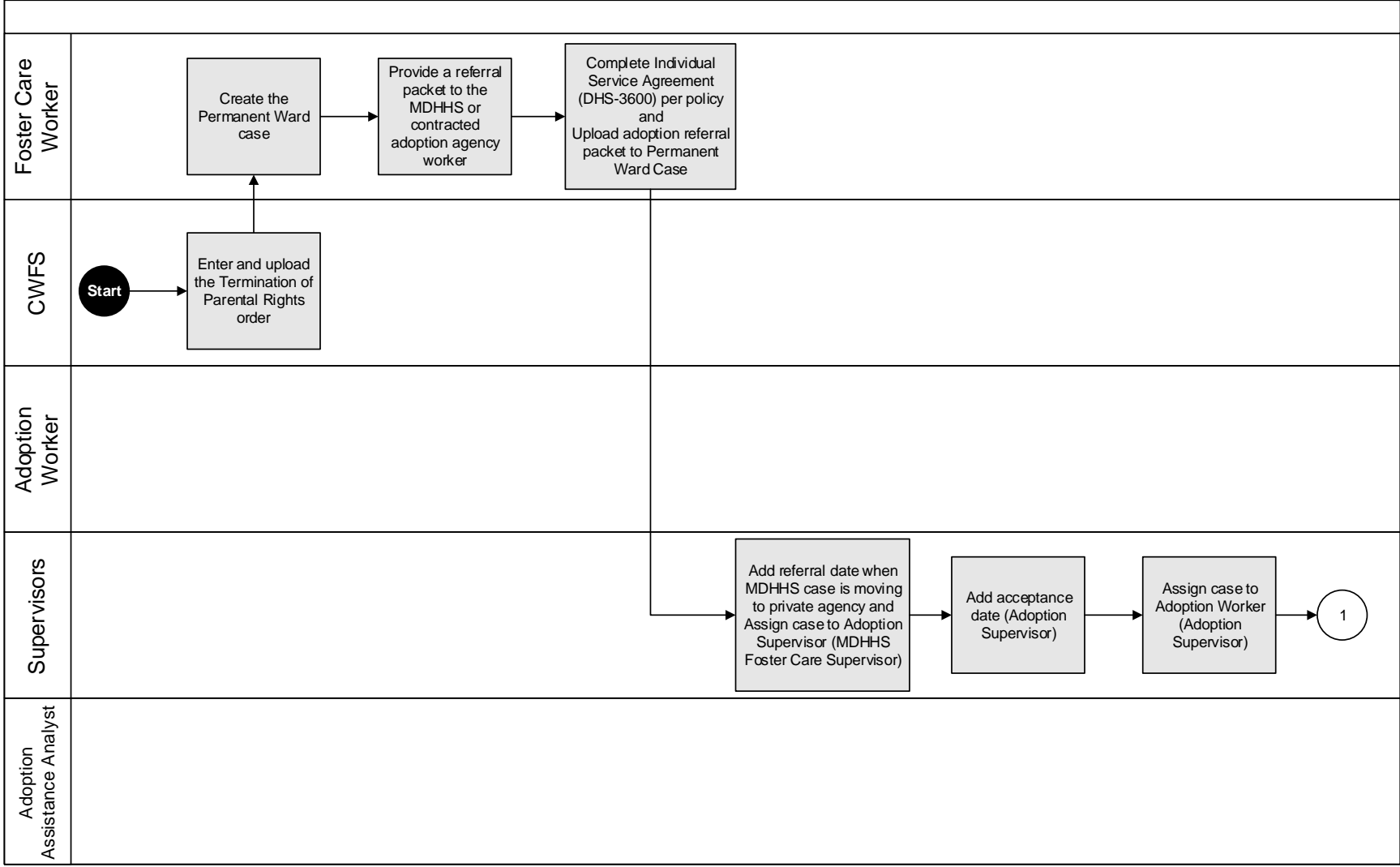
A: On the BCAL-3130 there is a checkbox, Approved for Licensure, and a checkbox, preliminarily Approved for Adoption. If the family is interested in adopting, the licensing worker can check this box. The adoption worker will then need to complete the DHS-612 for the family to be approved for adoption. If the initial BCAL- 3130 for licensure did not indicate that the family was preliminarily approved for adoption, the adoption worker must complete the BCAL-3130 and select the checkbox, Approved for Adoption. Per adoption policy, the adoption workers **cannot** skip the BCAL-3130 if it was only approved for foster home licensure. The home must also be approved for an adoption.

Q: If only some of the children are being adopted, does the foster care worker have to close the foster care program type/case before the adoption worker creates a new permanent ward case for the child(ren) being adopted?

A: The order placing (PCA 320) must be entered and the child must have an open, un-end dated 44 Legal Status and the foster care program type closed for the child (ren) being adopted before the new PW case can be created. Once those two steps are completed, then the adoption worker will create the second permanent ward case for the adoption program. Per policy, the foster care program type must be ended for the child (Ren) after the PCA 320 has been entered.

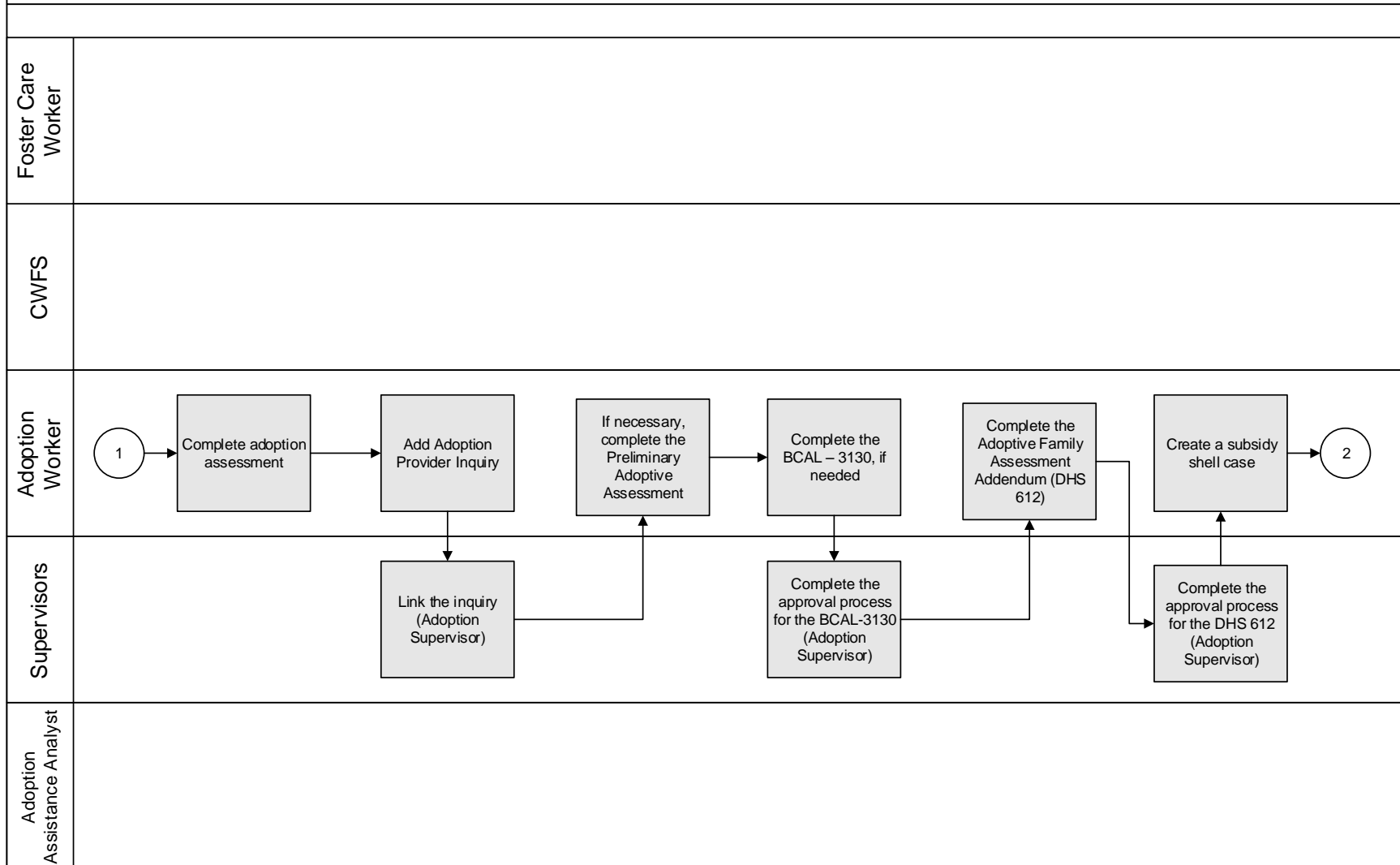
➤ Adoption Subsidy/Finalization of Adoption Process Flow

Adoption Subsidy/Finalization of Adoption - This diagram shows the different stages of the adoption process and the workers and supervisors needed to complete the work.



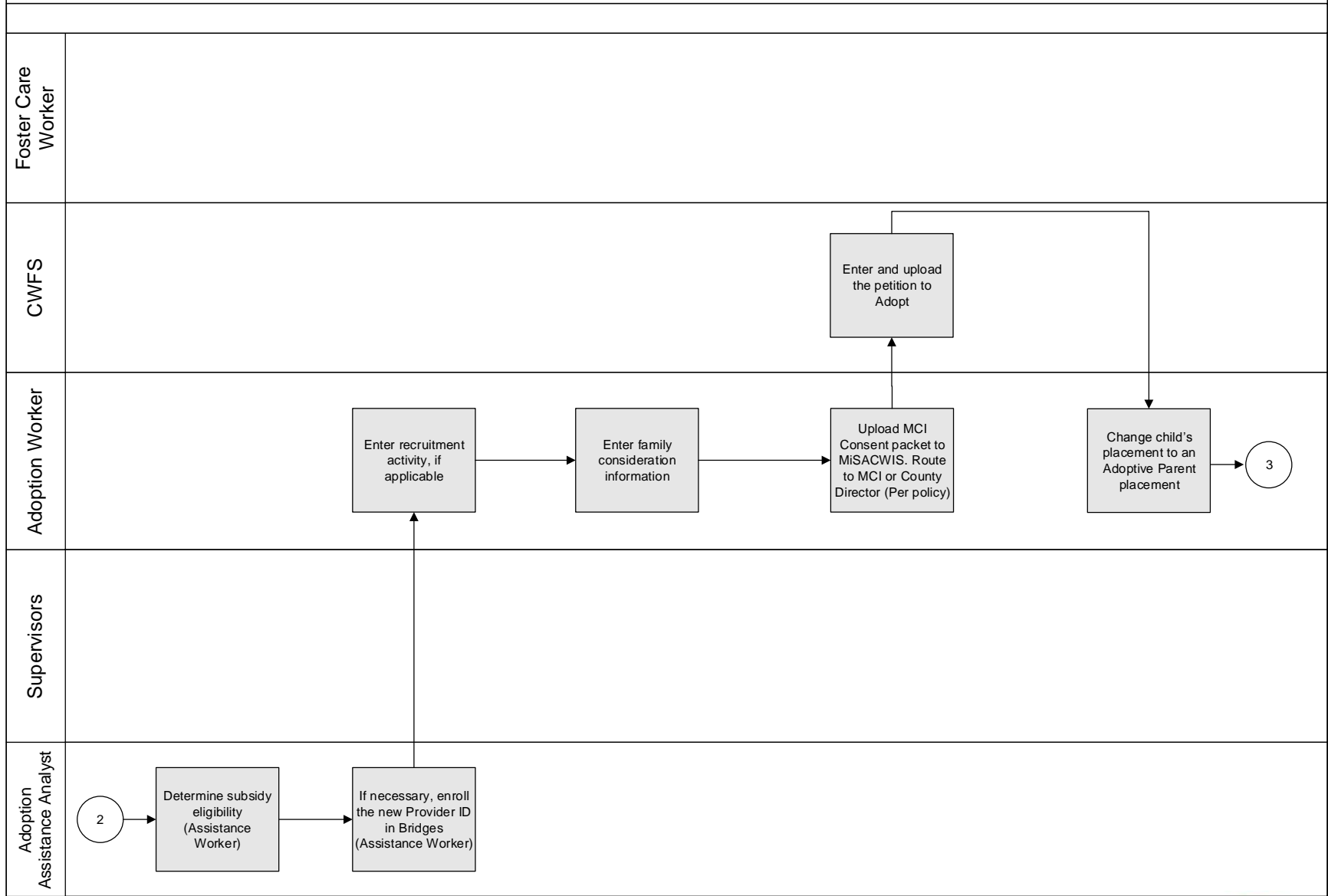
➤ Adoption Subsidy/Finalization of Adoption Process Flow

Adoption Subsidy/Finalization of Adoption (page 2)- This diagram shows the different stages of the adoption process and the workers and supervisors needed to complete the work.



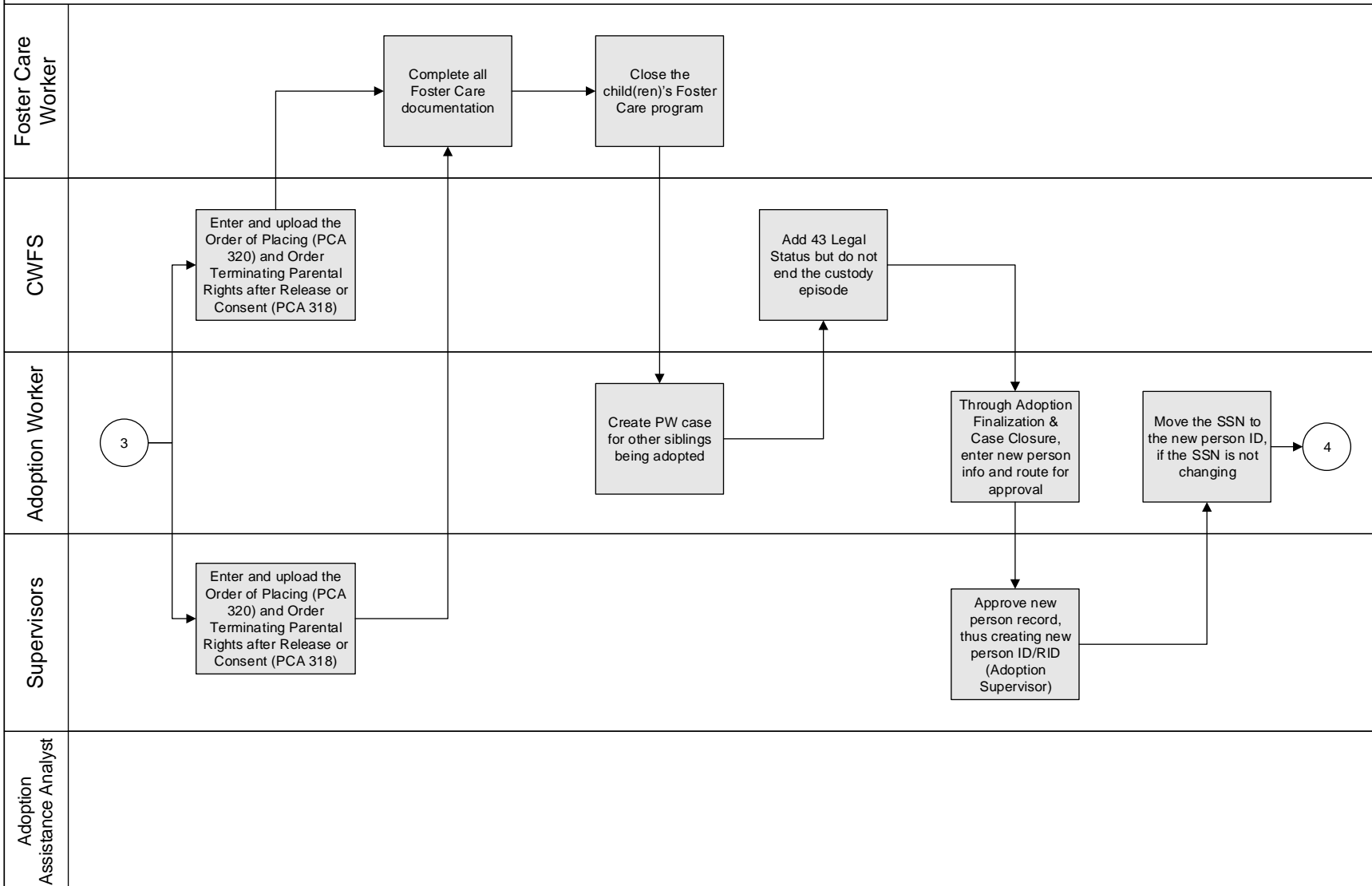
➤ Adoption Subsidy/Finalization of Adoption Process Flow

Adoption Subsidy/Finalization of Adoption (page 3) - This diagram shows the different stages of the adoption process and the workers and supervisors needed to complete the work.



Adoption Subsidy/Finalization of Adoption Process Flow

Adoption Subsidy/Finalization of Adoption (page 4) - This diagram shows the different stages of the adoption process and the workers and supervisors needed to complete the work.



➤ Adoption Subsidy/Finalization of Adoption Process Flow

Adoption Subsidy/Finalization of Adoption (page 5) - This diagram shows the different stages of the adoption process and the workers and supervisors needed to complete the work.

