

PLEASE RETURN THIS CHECKLIST WHEN SENDING CORRECTED SUBSIDY

FROM: Emily Montgomery Program Development Unit
573-522-8620

County/Contractor/Agency: _____

Date: _____

Adoption Subsidy / Subsidized Guardianship Agreement Checklist – NEW CONTRACTS

Policy regarding adoption subsidy and subsidized guardianship is contained in the Child Welfare Manual – Section 4 Chapter 30 and Attachments A through F.

An Adoption Subsidy Agreement must be approved by the Division Director PRIOR to the final decree of adoption. According to Missouri statute, step-parent adoptions are NOT eligible for adoption subsidy. Children adopted internationally are not eligible either.

Subsidized guardianship services may be used to assist a grandparent, aunt, uncle, adult sibling or adult first cousin to the child in providing legal guardianship for eligible children. Subsidized guardianship agreements must be approved prior to the guardianship being awarded. Payment from subsidy funds must not be made until the guardianship has been awarded.

Please state the relationship of the guardian to the child in the explanation section of the Agreement.

THERE WILL BE NO LEGAL GUARDIANSHIP AGREEMENTS APPROVED BEYOND THE LAST DAY OF THE MONTH OF THE 18TH BIRTHDAY UNDER ANY CIRCUMSTANCES.

DELIVERY OF SERVICES AND PAYMENT FOR SERVICES INCLUDED IN THE AGREEMENT MAY NOT BEGIN UNTIL THE DIVISION DIRECTOR HAS SIGNED THE AGREEMENT. NO BACKDATING OF SERVICES.

- This Agreement should be used only for BRAND NEW subsidy agreements initiated by staff on or after May 1, 2008. There can be no service begin dates prior to May 1, 2008. All changes made to contracts in existence prior to May 1, 2008, should be done using the attachment versions as they were initially written.
- Use CURRENT version of the forms:
Adoption Subsidy (CD-AD): 11/09
Subsidized Guardianship (CD-SG): 11/09

We cannot accept previous versions of the forms that may have put the Division Director's signature on a page by itself. You will need to delete any forms you have on your computer and download the latest version from the CD E-forms page.

- No changes of any kind may be made to the pre-printed template contents of this Agreement or Amendment.
- Because these documents are contracts and are legally binding, NO pencil, white out, or other alterations may be made in the Agreement. This includes any changes or additions made in handwriting when all other information is typewritten on the form. Changes may be handled by "crossing out" the item, writing in the change and requesting the adoptive parent(s)/guardian(s) to initial the change and date their initials. If more than one change must be made on any Agreement or Amendment, a new Agreement or Amendment will need to be prepared and signatures obtained again.
- Fill out the contract completely. Don't skip boxes. (i.e. Managing/Residence County, DVN, Parent/Guardian's address, County Office/Contractor/Private Child Placing Agency address)
- Send paperwork separated by child. If you have documentation and it's for more than one child, you MUST send separate paperwork for EACH CHILD – not one copy for all. CMU does not make additional copies of the documentation.
- On initial contracts send ALL 4 pages of the Agreement. This applies for faxes/scans also. Don't forget the backside of pages. Also, make sure that the CD Director's signature lines are at the bottom of page 1, not pushed to a second page because of printing. These will not be accepted.
- On contracts where additional services are being added after the initial Agreement, send all 4 pages of the Agreement AND the Amendment page. The Agreement must be sent along with the Amendment each time you submit subsidy paperwork. This applies for faxes/scans also. Each time a new Amendment page is completed, the Agreement and all previous Amendments must be sent as this is what constitutes a complete contract.
- ***EACH TIME A CONTRACT OR CONTRACT AND AMENDMENT ARE SENT TO CENTRAL OFFICE A COPY IS TO BE RETAINED IN THE LOCAL OFFICE.***
- Faxing/scanning paperwork is to be done only in extreme emergency situations, such as immediate residential placement and short notice of court hearing. ***CMU needs to be called for prior approval before faxing/scanning.*** All documentation, if necessary, must be faxed with contract for review. If you fax/scan a copy, the original MUST BE IDENTICAL TO FAX! You must promptly follow-up with sending the original to CMU.
- ***Make sure the SS-60 (licensure/certification) for AD or LG is in contracting system prior to sending Agreement/Attachment. If this is an initial adoption or guardianship or if a new child is being placed, the licensure/certification information needs to be current, so may need to update. The worker shall attach a copy of the ZVPF screen indicating that there is a current AD/LG contract in the system.***
- Managing County must be completed. Please put County name and code, not just code. Copies of approved subsidies will be returned to the Managing County.

- Residence County must be completed. Please put County name and code, not just code. Subsidy paperwork is entered in the contracting system and the files by the family's residence county. Be sure the address on the forms and in both the PROD and FACES systems are current.
- Parent(s)/Guardian(s) Name: Make sure that if the marital status has changed that all changes have been made in both PROD and FACES systems (systems and contract need to be the same.). Also provide us with documentation regarding change of name, removal or addition of person from the subsidy – marriage certificate, order of protection or custody order, divorce decree, death certificate.
- Make sure the name of the child, DCN, and date of birth is for the same child (not name of one child and DCN/DOB for another).
- Effective date of Agreement and service begin dates should be the same.
- Copy of child's profile/summary must be sent to CMU with subsidy Agreement. The summary cannot contain any identifying information on the biological parents (no name at all, date of birth, location, etc.)

Adoption Subsidy / Subsidized Guardianship Agreement/Amendment

Services: Basic subsidy includes: MO Health Net (Medicaid) to end of month of 18th birthday
 Standard maintenance to end of month of 18th birthday
 Day Care to end of month of 13th birthday
 Legal fees - \$1,500.00 for adoption and \$500 for guardianship

In the event that MO Health Net, maintenance or daycare are declined, the parent(s)/guardian(s) must sign a dated statement indicating specifically which services they are declining. Those services can never be approved at any future date. All basic subsidy services must be addressed in the explanation section in some manner, if the family does not wish to decline a service as they may wish to utilize the service in the future it must be addressed in the explanation section.

Above basic subsidy includes: Special Maintenance
 Residential Treatment
 Respite
 Non-recurring Other
 Other services over and above basic services

Services must be requested monthly, yearly or one-time only. Computer will not accept daily.

Make sure that the very last day of month is written for services, not day short in those months that have 31 days. (Thirty days hath September, April, June and November; all the rest have thirty-one, except February, which has twenty-eight, or twenty-nine in leap year.)

NEW subsidy start dates for all services MUST be the same. Service begin dates cannot be prior to license begin date, nor prior to Agreement Effective Date. (Make sure year end dates are correct – not that end date is prior to begin date!)

AMENDMENT: You must include the initial 4 page Agreement when completing and sending an Amendment. If prior Amendments have been completed, each previous Amendment must also be included. Please number the Amendment in space at top prior to "Amendment to Initial Subsidy".

There must be begin and end dates for ALL services on Agreement and Amendment.

MO Health Net: Code: MEDI
 Payment Frequency: Y (yearly)
 Maximum Amount: Leave blank, no amount listed
 Approval time period: To end of month of 18th birthday

Maintenance: Code: **MAIN** for standard maintenance
 Payment Frequency: M (monthly)
 Maximum Amount: "Base Rate" as preprinted on Agreement. These rates are:
 As of July 1, 2008: \$232 for age 0-5 \$283 for age 6-12 \$313 for age 13-21
 *NOTE: By stating "base rate", a new amendment need not be completed as a child ages to update maintenance amounts or if there is a rate increase.
 Approval time period: To end of month of 18th birthday.

Code: **SMAS** for special maintenance (behavioral or medical)
 Payment Frequency: M (monthly)
 Maximum Amount: "Base Rate" as preprinted on Agreement if it is the rate of \$651 (prior to July 1, 2008) or \$671 (as of July 1, 2008). If it is any amount other than \$651 or \$671, that amount will need to be written on a separate line with appropriate coding. NOTE: By stating "base rate", a new amendment need not be completed if there is a rate increase.
 Approval time period: For two years at a time or up to child's 18th birthday if it is determined that child's condition will not improve and/or that adoptive/guardian family will not be in agreement to lowering maintenance amount. For initial agreements requesting behavioral SMAS the approval time period should be two years, unless otherwise stated by the staffing team. For initial agreements requesting medical SMAS the approval time period is based on the child's medical condition, if there is documentation stating that the condition is life long and will not improve then the subsidy shall be written to age 18.

Documentation Required: CS-9 (Behavioral) or CS-10 (Medical)
FST meeting recommendations / Staffing notes/form
Email/memo from Regional Director or RCST Coordinator.

Documentation for SMAS must be no more than 60-90 days prior to service begin date.

If requesting approval of SMAS to age 18, must include a letter from a medical or mental health professional that includes diagnosis, prognosis and statement that condition not likely to improve.

For continued SMAS service, submit documentation from family for continued need. Does not require BFC staffing. If need cannot be documented, but family refuses to agree/concur with reduction, document accordingly.

Child Care:

Code: DAYC
Payment Frequency: M (monthly)
Maximum Amount: State Contracted Rate – as preprinted on Agreement.
Approval time period: To end of month of child's 13th birthday unless extraordinary need exists which will be considered on a case by case basis after review of documentation from physician or mental health professional.

Both parents must work in order to receive day care assistance. Parents attending college may be approved for day care assistance during hours they are in class.

The explanation section must contain the following statement: *“Child care may be approved at the state contracted rate to age 13 when both parents/guardians are working. Payment may only be made to licensed, contracted or registered providers.”*

In-state providers must be licensed and contracted **or** registered to be paid. Out-of-state providers can be licensed but **MUST** also be registered with Missouri to be paid.

Legal Fees:

Code: NRLG
Payment Frequency: O (one time only)
Maximum Amount: Adoption - \$100 per hour up to \$1,500.00 non-contested cases (Up to \$3,000 in contested matters)
Guardianship-\$100 per hour up to \$2000.00 for all cases
Approval time period: May be authorized for 1 year.
Documentation required if contested – Itemized invoice from attorney with explanation and copy of court order, if exists.
Legal fees include attorney, court and publication costs.

The following statement **MUST** be in the explanation section of the Agreement regarding legal fees. Please use the appropriate statement for the type of subsidy being completed:

“Legal fees may be reimbursed up to \$100 per hour to a maximum of \$1500 in uncontested adoptions and \$3000 in contested adoptions.”

“Legal fees may be reimbursed up to \$100 per hour to a maximum of \$2000 in guardianships.”

Non-recurring Expenses:

Code: NROT
Payment Frequency: O (one time only)
Maximum Amount: Non-recurring placement related expenses up to \$1,000 (pre-placement transportation, lodging, food)
Private agency fee reimbursement up to \$3,500.00 (adoption study, including health and psychological exam, and supervision of placement prior to adoption finalization)
Approval time period: One year
NROT services should be on the initial agreement in order to be approved by Central Office. If NROT is on the initial agreement and an additional amount is determined to be needed (within the approved rates of \$1000.00 per child) this may be added via amendment as needed.

Residential Treatment:

Code: ASRT
Payment Frequency: M (monthly)
Maximum Amount: Put specific amount
Approval time period: No more than 6 months at a time, however time period must match the RCST's approval
Documentation: Email/memo from RCST Coordinator

Documentation for residential services must be no more than 60-90 days **PRIOR** to service begin dates.

Respite Care:

Code: RSCR
Payment Frequency: Y (yearly)
Maximum Amount: Standard maintenance – Maximum of \$240 (12 units at \$20 per unit)
Above standard maintenance – Maximum of \$399 (19 units at approx. \$21 per unit)
Approval time period: For same length of time that maintenance has been approved.
Documentation: Letter requesting service by adoptive or guardianship family, stating child's need for respite. A letter supporting this need must also be completed by the worker.

Explanation: Complete explanation section for all services. If the explanation will not completely fit on the Agreement form, you can put it on a separate sheet, but it **MUST** be signed by the parents/guardians as it is now considered a separate page of the Agreement.

Inactivating Services: A reason for parental request to inactivate a service must be included in the Explanation Section. The date to inactivate the service must be listed in the table, along with the parent(s) initials acknowledging this request.

Signatures:

Each parent/guardian named in the Agreement needs to sign THEMSELVES. If one cannot sign due to deployment, medical reasons, etc., provide documentation explaining the absence of a signature or provide the Durable Power of Attorney giving spouse authority to sign. Each page of the Agreement must be signed.

Parent/Guardian needs to include their current address. Part II. Responsibilities of the Parent/Guardian (J.) requires them to notify CD of address changes. Be sure the address on the forms and in the system are current.

County Office Address for Notification: Managing County/Contractor/Private Child Placing Agency office address should be included so the parents/guardians have an address for notification of changes to the agreement.

Reviewed By:

The Subsidy Clearance Form (CD-SCF-1) must be attached, containing necessary supervisory approvals, on all subsidies submitted to CMU. Make sure that the worker's name is written legibly so we know who to contact if there are questions.

A basic subsidy requires signatures of the parents/guardians, the Children's Services worker, and the Circuit Manager (or supervisor if a contracted agency).

Above basic subsidy requires signatures of the parents/guardians, Children's Services worker, Circuit Manager (or Supervisor if a contracted agency) **AND** must have CD Regional Director's or designee's approval.

Make sure that the worker's name is written legibly so we know who to contact if there are questions. Contracted agencies must complete the SS-60 and Subsidy Agreement Cover Sheet for PBC Agencies so that we know where to return the copy of the subsidy. The County Office Name and address also needs to be included so that the approved copy can be returned to the appropriate office.

It is the responsibility of the worker completing the subsidy to keep a copy of **all** subsidy paperwork (application, documentation, etc.) that is sent to CMU. A copy of this information is NOT returned with the approved copy.

Approved Copies:

A copy of the Agreement/Amendment will be returned to the Managing County Office, contracted agency, or private child placing agency after signed by the Division Director. The Managing County Office/Contractor/Private Child Placing Agency should then forward a copy to the adoptive parent(s)/guardian(s) with a cover letter as explained in Section 4 Chapter 30.6 Approval Process.

OTHER:

Please allow 30-45 days for processing subsidy paperwork. The 30 to 45 day limit is not the time that it is mailed out to the family for signatures; it is the date that all signatures have been obtained and it is ready to be submitted to CMU with 30 to 45 days until the start date. This means if you still have to mail something to the family for signature, your start date may need to be 60 to 75 days in the future to allow for the 30 to 45 days needed by CMU.

If you want to know if a subsidy has been entered in the system, please check PROD/Green Screen (ZCVR or ZCCN).

NOTES: