Recording Foster and Adoptive Parent Training for Private Agencies

This Knowledge Base Article discusses how private agencies should record pre-service training or continuing training for a foster parent or an adoptive parent.

However, it is important to note the following:

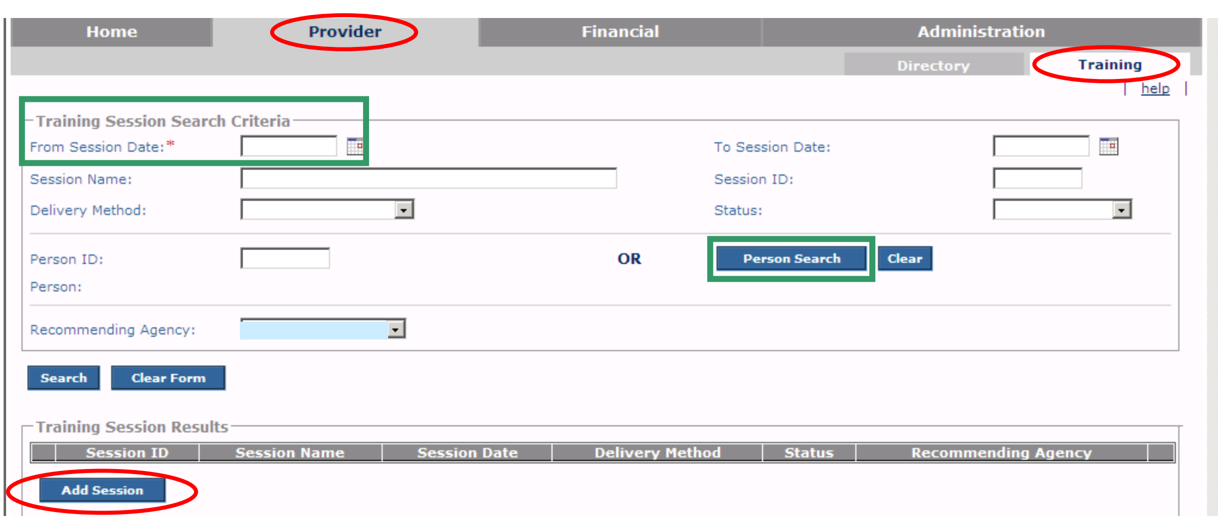
- To record either foster or adoptive training, a user must have a security user-group access of **Private Agency Provider**.
- Each agency should only record training for the people from their agency who went to the training, or for those who the agency currently licenses / approves for foster care or adoption.
- If your agency is Agency Y, but the training occurred at Agency Z, Agency Y personnel should record the training session for Agency Y's participation.
- Adoptive parent training is not reimbursable, so the payment and reimbursement information discussed later is not applicable to that situation. However, the adoptive parent training should still be recorded in SACWIS.

Adding a Training Session

1. On the SACWIS **Home** screen, click the **Provider** tab.
2. Click the **Training** tab. The **Training Sessions Search Criteria** screen appears.

Note: To locate an existing record, you can search by an already-recorded training Session ID (**From Session Date** field) or by a training participant (**Person Search** button) as shown in green below.

3. To add a new training session, click the **Add Session** button.



The **Training Session Information** screen appears.

Completing the Session Information Tab

On the **Session Information** tab, complete the following **mandatory** fields that describe the parent's training:

1. In the **Session Name** field, enter the appropriate session name.
2. In the **Instructor Name** field, enter the instructor's name.
   - An instructor's name is not required to save the record. However per Policy, an instructor's name is required to receive reimbursement for the training.
   - The **Instructor Name** field can only be edited until a payment exists for the training session.

Important: When completing the **Session Date**, **Session Start Time**, and **Session End Time** fields (discussed below), the system will prevent you from adding a participant to a training session if the date and hours overlap with another training session already entered for that participant. However, the system will allow a **one minute overlap** in case the two training sessions start and end at the same time (i.e. training from 8:00-12:00 and 12:00-4:00 on the same date).

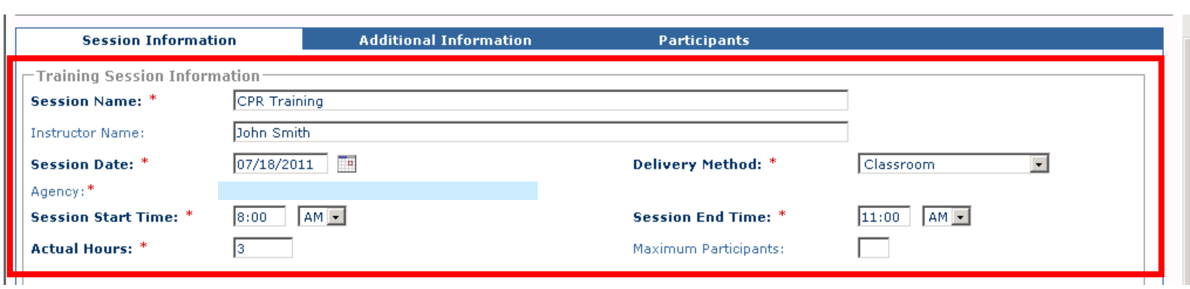
3. In the **Session Date** field, enter the appropriate date.

For Private Agencies: Any training held **on or after** March 1, 2012 will be reimbursed through SACWIS. Any training held **prior to** March 1, 2012 will be reimbursed after submitting a JFS 1350 form. (The March 1st date is not yet verified, however it is anticipated that this will be the date.)

4. In the **Delivery Method** field, select the appropriate method.

Note: The **Agency** field defaults to your agency's name and can't be changed.

5. In the **Session Start Time** and **Session End Time** fields, enter the appropriate time.
6. In the **Actual Hours** field, enter the number of training hours.



7. In the **Training Competencies** field, select the appropriate competency.

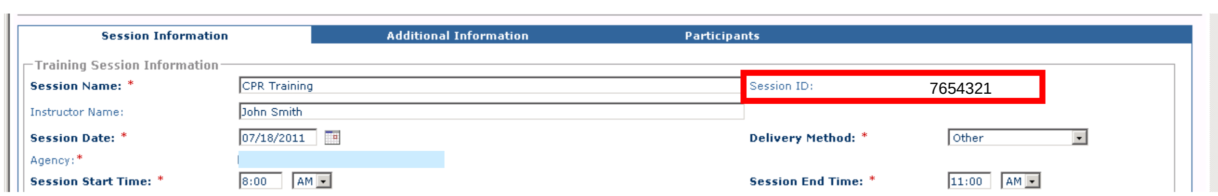
Important: You must select at least **one** training competency, but more than one competency can be selected.

8. Click the **Add** button. The selection(s) moves to the **Selected Types** field below it.

9. In the **Status** field, select **Draft**.

Important: If **Completed** is selected, the record can no longer be modified.

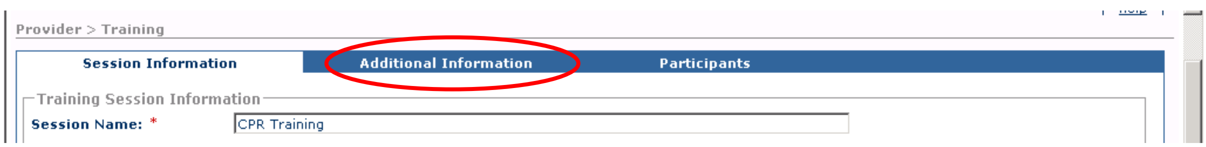
The **Session ID** number appears in the **Session ID** field (upper-right corner of the screen).



10. Continue with the steps in the next section.

Completing the Additional Information Tab

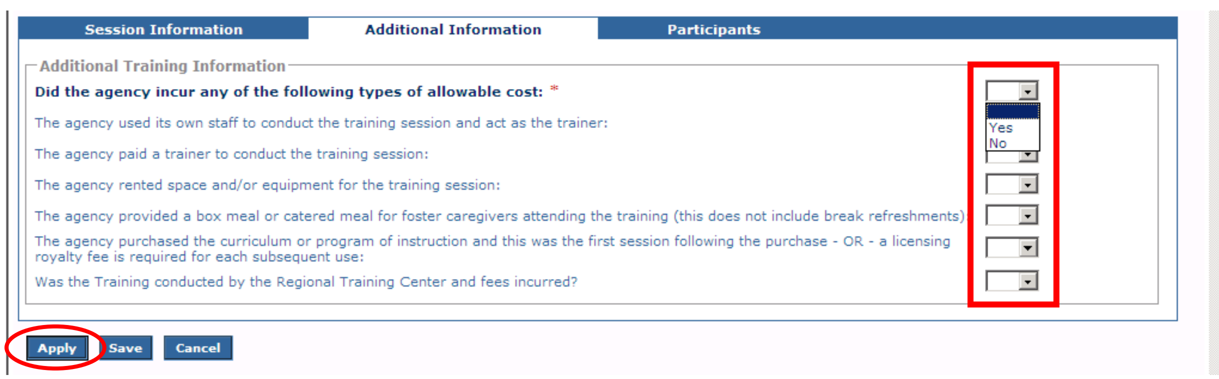
1. Click the **Additional Information** tab.



The **Additional Training Information** screen appears.

2. In the **Did the agency incur any of the following types of allowable cost** field, select **Yes** or **No**.
    - If you select **Yes**, complete the other drop-down fields below it. At least one subsequent question must also be marked as **Yes**.
    - If you select **No**, the drop-down fields gray out.

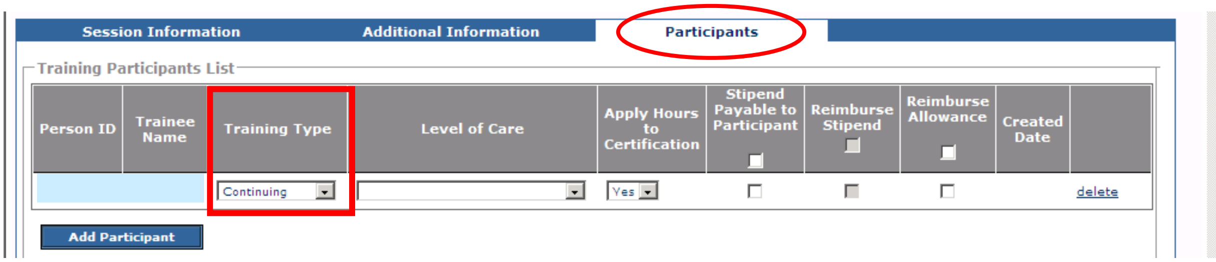
3. When complete, click the **Apply** button.



The record is saved.

Completing the Participants Tab

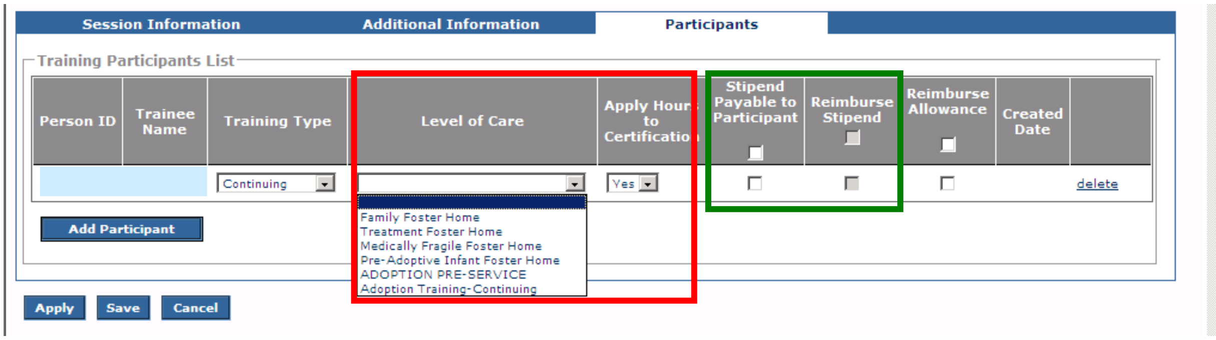
1. Click the **Participants** tab.
2. If no participant appears, follow the steps in the **Adding a Participant** section later in this Knowledge Base Article.
3. If a participant appears, in the **Training Type** field, select the appropriate type.



4. In the **Level of Care** field (shown below), select the appropriate level from the drop-down list.
   - If a training participant is already licensed and attending training to upgrade their level-of-care credentials, select **Adoption Training – Continuing** as the training type. For example, if a person is licensed to run a family foster home, but is attending training to open a treatment foster home.
   - If either **Adoption Pre-Service** or **Adoption Training – Continuing** is selected from the drop-down list, a payment will **not** be created for financial payment processing.
5. In the **Apply Hours to Certification** field, select **Yes** or **No** from the drop-down list.

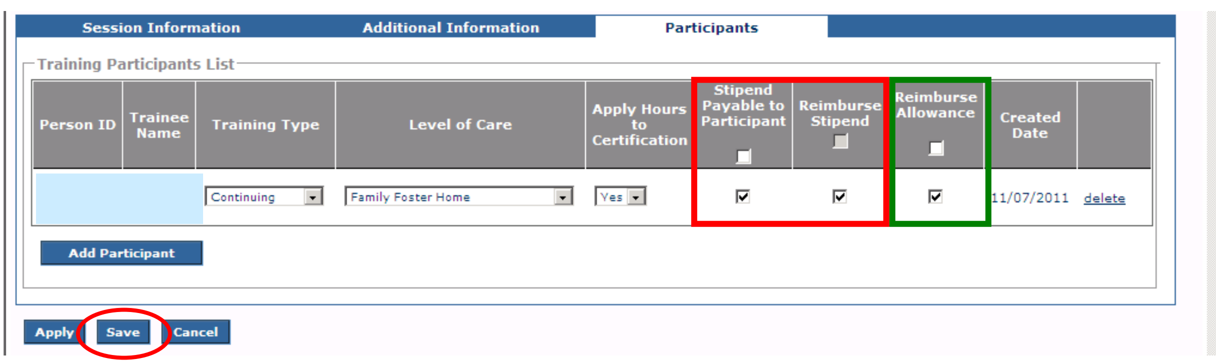
Important:

- This screen was designed with the understanding that (at most agencies) the user who records the training will be different from the user who determines if the training is payable and reimbursable. To complete the **Apply Hours to Certification** field and the **Stipend Payable to Participant** field, the user must have **Private Agency Fiscal Worker** security.
- If the **Apply Hours to Certification** field shows **No**, a payment will not be reimbursed.



6. Click the **Stipend Payable to Participant** check box (shown below).
   - As shown in green above, the **Reimburse Stipend** check box stays grayed out until the **Stipend Payable to Participant** check box in clicked; then the system auto-checks the **Reimburse Stipend** box.
   - If re-imbursement is not desired, uncheck the **Reimburse Stipend** check box.
   - If the **Stipend Payable to Participant** field is unchecked, a payment will not be generated.

7. If applicable, click the **Reimburse Allowance** check box.
8. Click the **Save** button.

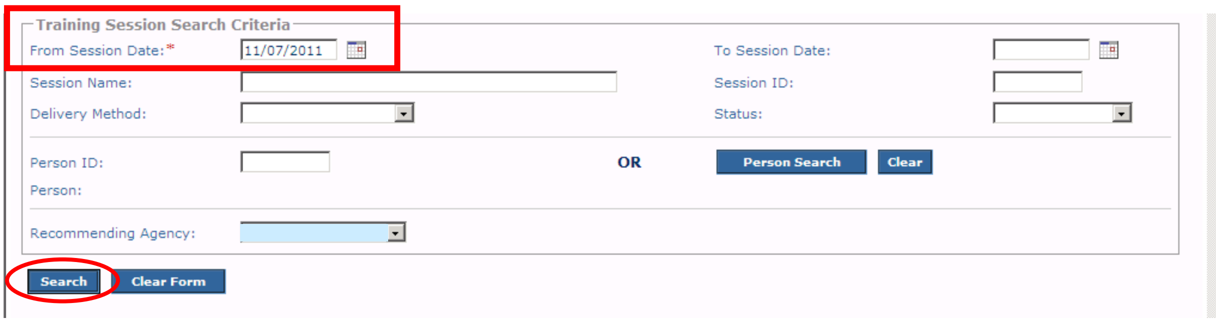


The **Training Session Search Criteria** screen appears. Additionally, a date appears in the **Created Date** field (as shown above). The **Created Date** field shows when a participant was added to the training session.

Adding Information to a Training Session Record

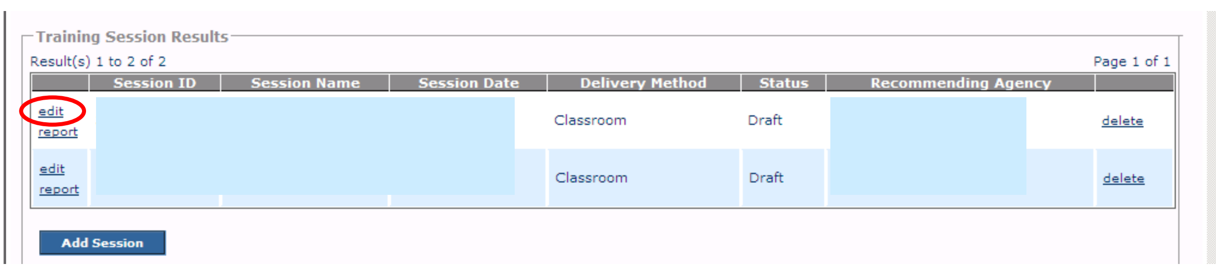
To search for a specific training session by date and add information to the record, complete the following steps:

1. On the **Training Session Search Criteria** screen in the **From Session Date** field, enter a session date.
2. Click the **Search** button.



The filtered records appear in the **Training Session Results** grid section.

3. Click the **Edit** link in the appropriate row.



The **Training Session Information** screen appears.

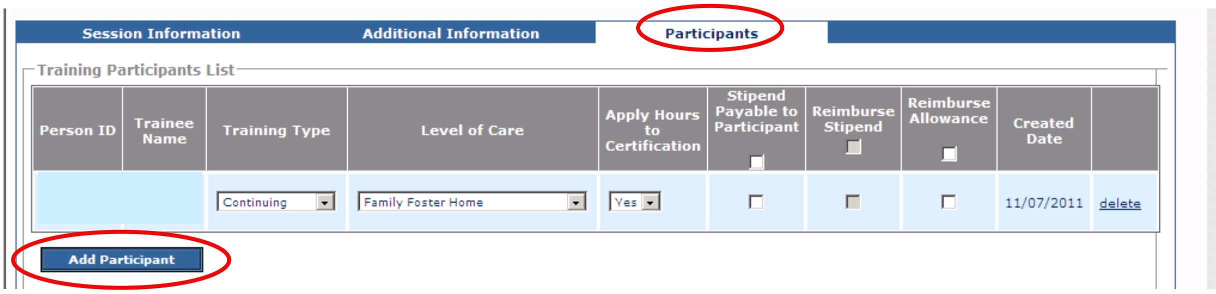
4. To add information to the record, follow the steps in the **Completing the Session Information Tab** section above. However, not all of the steps within that section may apply to the information being added.

Adding a Participant

Each agency can enter as many participants from their agency as attended the training session, even if the training has been marked as **Completed**.

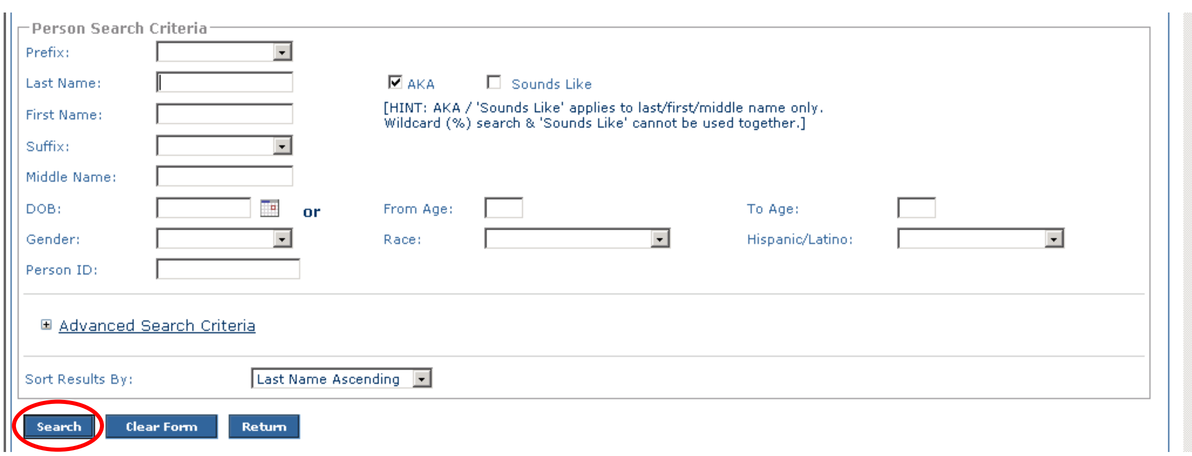
However, **saved participants cannot be deleted** and the **training session information cannot be modified** in SACWIS. To add a new participant:

1. Click the **Participants** tab. The **Training Participants List** screen appears.
2. Click the **Add Participant** button.



The **Person Search Criteria** screen appears.

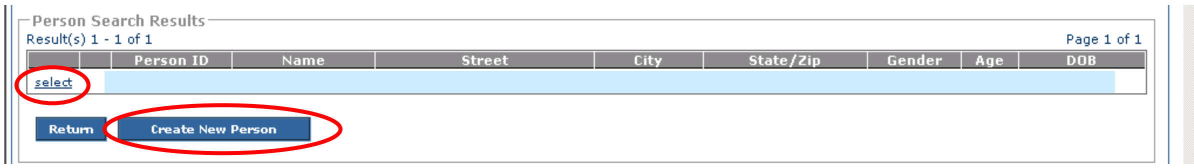
3. Enter information into the appropriate fields.
4. Click the **Search** button.



The results appear in the **Person Search Results** section of the screen.

Select an existing person or add a new person as follows:

5. To choose an existing person, click the **Select** link in the appropriate row.
6. To add a new person, click the **Create New Person** button.



7. Complete the **Person Information** screen.
8. Click the **Save** button.
9. Then, click the appropriate **Select** link (**Person Search Results** section).

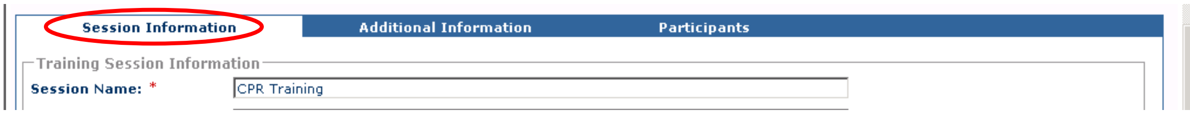
The **Training Participants List** screen appears displaying the selected person's name along with the existing participant(s).

10. Complete the remaining fields in this new row by using the steps in the **Completing the Participants Tab** section of this Knowledge Base Article.

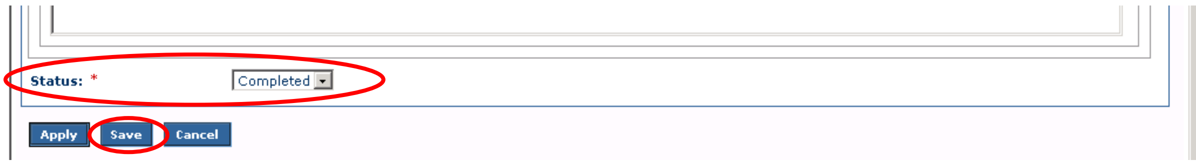
Marking the Training as Completed

1. When the training is complete, navigate to the **Training Session Information** screen as discussed previously in this document.

2. Click the **Session Information** tab (which may default).

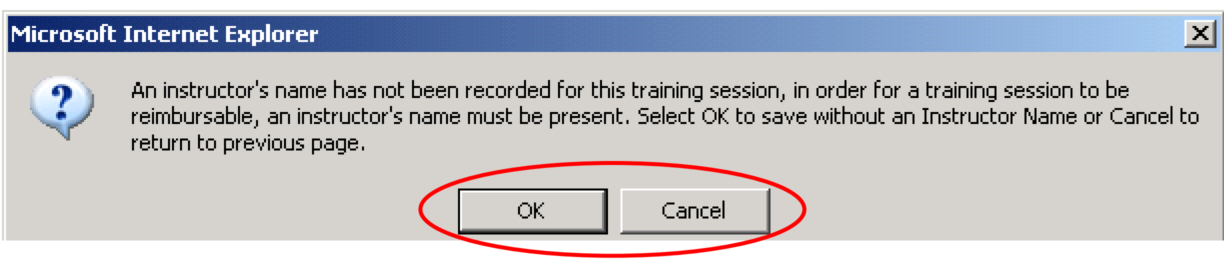


3. In the **Status** field (bottom of the screen), choose **Completed**.
4. Click the **Save** button.



Important: When you click save, if an instructor's name has not been previously entered, a validation message appears stating you must put in a name to get reimbursement.

5. If reimbursement is not desired, click the **OK** button.
6. If reimbursement is desired, click **Cancel** and return to the **Session Information** tab to enter the instructor's name.



Once saved, the **Training Session Search Criteria** screen appears displaying **Completed** in the **Training Session Results** section.