

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 screenshot shows the SACWIS interface with the 'Provider' tab selected. The 'Training' sub-tab is also selected. The 'Training Sessions Search Criteria' form is displayed, featuring several search fields and buttons. The 'Person Search' button is highlighted in green. Below the search form is a table for 'Training Session Results' with columns for Session ID, Session Name, Session Date, Delivery Method, Status, and Recommending Agency. An 'Add Session' button is highlighted in red at the bottom left of the table.

The **Training Session Information** screen appears.

Recording Foster and Adoptive Parent Training for Private Agencies

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.

Session Information	Additional Information	Participants
Training Session Information		
Session Name: *	CPR Training	
Instructor Name:	John Smith	
Session Date: *	07/18/2011	Delivery Method: * Classroom
Agency: *	[Light Blue Highlighted]	
Session Start Time: *	8:00 AM	Session End Time: * 11:00 AM
Actual Hours: *	3	Maximum Participants: [Empty]

Recording Foster and Adoptive Parent Training for Private Agencies

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 screenshot shows a web form for adding training competencies. At the top, there are fields for 'Session Start Time' (8:00 AM), 'Session End Time' (11:00 AM), 'Actual Hours' (3), and 'Maximum Participants'. Below these is a section titled 'Training Competencies' with a red border. Inside this section, there is a list of 'Available Topics' including 'Adoption Process-Adoption Subsidies', 'Adoption Process-Homestudy', 'Adoption Process-Legalization', 'Adoption Process-Matching', and 'Adoption Process-Openness of Adoption'. Below the list are four buttons: 'Add', 'Add All', 'Remove', and 'Remove All'. The 'Add' button is circled in red. Below the buttons is a 'Selected Types' field containing 'CPR & First Aid'. At the bottom of the section is a 'Status' dropdown menu set to 'Draft'. At the very bottom of the form are 'Apply', 'Save', and 'Cancel' buttons.

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

The screenshot shows the 'Session Information' tab of a form. It contains fields for 'Session Name' (CPR Training), 'Instructor Name' (John Smith), 'Session Date' (07/18/2011), 'Agency', 'Session Start Time' (8:00 AM), 'Session End Time' (11:00 AM), 'Delivery Method' (Other), and 'Session ID' (7654321). The 'Session ID' field is highlighted with a red box.

10. Continue with the steps in the next section.

Recording Foster and Adoptive Parent Training for Private Agencies

Completing the Additional Information Tab

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



Provider > Training

Session Information **Additional Information** Participants

Training Session Information

Session Name: * CPR Training

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.



Session Information Additional Information Participants

Additional Training Information

Did the agency incur any of the following types of allowable cost: *

The agency used its own staff to conduct the training session and act as the trainer: Yes

The agency paid a trainer to conduct the training session: No

The agency rented space and/or equipment for the training session:

The agency provided a box meal or catered meal for foster caregivers attending the training (this does not include break refreshments)

The agency purchased the curriculum or program of instruction and this was the first session following the purchase - OR - a licensing royalty fee is required for each subsequent use:

Was the Training conducted by the Regional Training Center and fees incurred?:

Apply Save Cancel

The record is saved.

Recording Foster and Adoptive Parent Training for Private Agencies

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.

Person ID	Trainee Name	Training Type	Level of Care	Apply Hours to Certification	Stipend Payable to Participant	Reimburse Stipend	Reimburse Allowance	Created Date
		Continuing		Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	delete

[Add Participant](#)

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.

Recording Foster and Adoptive Parent Training for Private Agencies

Person ID	Trainee Name	Training Type	Level of Care	Apply Hours to Certification	Stipend Payable to Participant	Reimburse Stipend	Reimburse Allowance	Created Date	
		Continuing		Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		delete

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 is clicked; then the system auto-checks the **Reimburse Stipend** box.
 - If re-imburement 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.

Person ID	Trainee Name	Training Type	Level of Care	Apply Hours to Certification	Stipend Payable to Participant	Reimburse Stipend	Reimburse Allowance	Created Date	
		Continuing	Family Foster Home	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	11/07/2011	delete

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.

Recording Foster and Adoptive Parent Training for Private Agencies

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.

Training Session Search Criteria

From Session Date: * 11/07/2011 To Session Date:

Session Name: Session ID:

Delivery Method: Status:

Person ID: OR Person Search Clear

Person:

Recommending Agency:

Search Clear Form

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

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

Training Session Results

Result(s) 1 to 2 of 2 Page 1 of 1

Session ID	Session Name	Session Date	Delivery Method	Status	Recommending Agency	
edit			Classroom	Draft		delete
report						
edit			Classroom	Draft		delete
report						

Add Session

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.

Recording Foster and Adoptive Parent Training for Private Agencies

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 screenshot shows the 'Training Participants List' interface. At the top, there are three tabs: 'Session Information', 'Additional Information', and 'Participants'. The 'Participants' tab is circled in red. Below the tabs is a table with the following columns: Person ID, Trainee Name, Training Type, Level of Care, Apply Hours to Certification, Stipend Payable to Participant, Reimburse Stipend, Reimburse Allowance, Created Date, and a 'delete' link. The table contains one row with the following data: Training Type is 'Continuing', Level of Care is 'Family Foster Home', Apply Hours to Certification is 'Yes', and Created Date is '11/07/2011'. Below the table, there is a blue button labeled 'Add Participant', which is also circled in red.

The **Person Search Criteria** screen appears.

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

The screenshot shows the 'Person Search Criteria' form. It includes several input fields: Prefix (dropdown), Last Name, First Name, Suffix (dropdown), Middle Name, DOB (text with calendar icon), Gender (dropdown), Person ID (text), AKA (checkbox), Sounds Like (checkbox), From Age (text), To Age (text), Race (dropdown), and Hispanic/Latino (dropdown). There is a hint: '[HINT: AKA / 'Sounds Like' applies to last/first/middle name only. Wildcard (%) search & 'Sounds Like' cannot be used together.]'. Below the form, there is a checkbox for 'Advanced Search Criteria' and a 'Sort Results By:' dropdown set to 'Last Name Ascending'. At the bottom, there are three buttons: 'Search' (circled in red), 'Clear Form', and 'Return'.

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

Recording Foster and Adoptive Parent Training for Private Agencies

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.

Person Search Results
Result(s) 1 - 1 of 1 Page 1 of 1

Person ID	Name	Street	City	State/Zip	Gender	Age	DOB
select							

[Return](#) [Create New Person](#)

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).

Training Participants List

Person ID	Trainee Name	Training Type	Level of Care	Apply Hours to Certification	Stipend Payable to Participant	Reimburse Stipend	Reimburse Allowance	Created Date	
				Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		delete
		Continuing	Family Foster Home	Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11/07/2011	delete

[Add Participant](#)

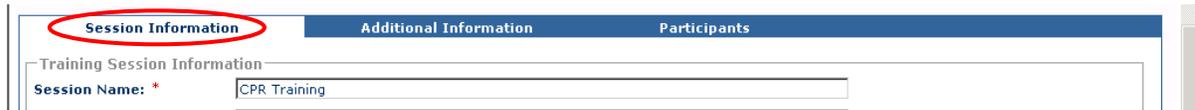
10. Complete the remaining fields in this new row by using the steps in the **Completing the Participants Tab** section of this Knowledge Base Article.

Marking the Training as Completed

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

Recording Foster and Adoptive Parent Training for Private Agencies

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



Training Session Information

Session Name: *

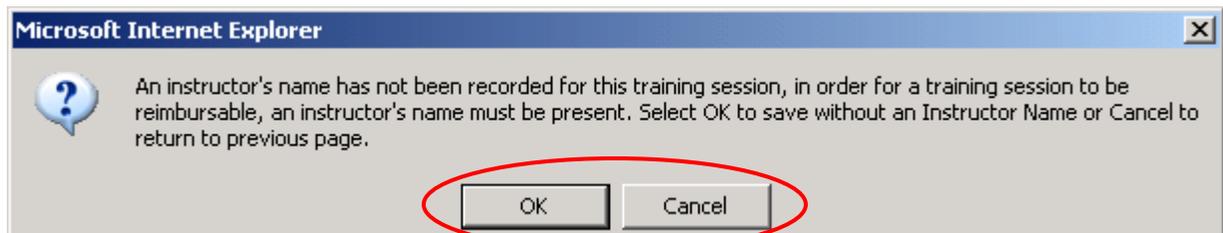
3. In the **Status** field (bottom of the screen), choose **Completed**.
4. Click the **Save** button.



Status: *

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.

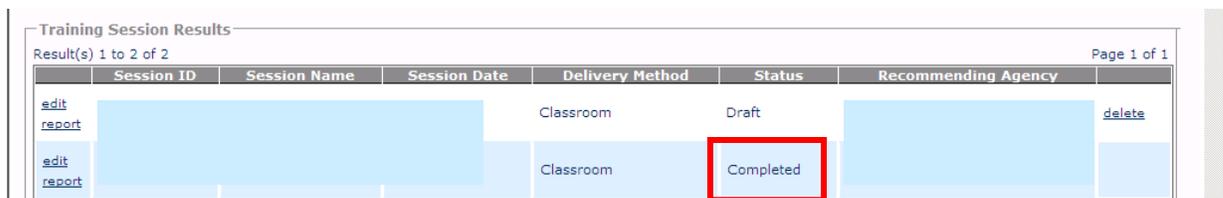
5. If reimbursement is not desired, click the **OK** button.
6. If reimbursement is desired, click **Cancel** and return to the **Session Information** tab to enter the instructor's name.



Microsoft Internet Explorer

An instructor's name has not been recorded for this training session, in order for a training session to be reimbursable, an instructor's name must be present. Select OK to save without an Instructor Name or Cancel to return to previous page.

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



Training Session Results

Result(s) 1 to 2 of 2 Page 1 of 1

	Session ID	Session Name	Session Date	Delivery Method	Status	Recommending Agency	
edit report				Classroom	Draft		delete
edit report				Classroom	Completed		