



IV-E Adoption – Initiate Determination Step Action Table



User

IV-E Worker or Adoption Worker.

Process

These step action tables describe the actions needed to create, view, and edit an Adoption Determination for a specific client.

Introduction

- Manually created IV-E Adoptions determinations will NOT require a removal record in Trails.
- The icons next to the options in the left navigation panel will show colors to indicate progress in the Determination. **Notes** and **Entitlements** are always Gray.
 - **Gray** indicates that this section is not started or started but not completed.
 - **Green** indicates that this section is completed and that the child may meet IV-E Eligibility requirements within that section, but final determination may depend on answers in other sections.
 - **Red** indicates that this section is completed and indicates that the child does not meet IV-E Eligibility requirements based on answers within this section.
- Columns in the table can be sorted or filtered using the icons to the left of each column heading.
- The County filters default to the primary county or agency associated with the worker who opens the page. The picklists contain all of the counties and/or agencies associated to the worker.

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Initiate an Adoption Determination:

- The County filter defaults to the primary county or agency associated with the worker who opens the page. The picklist contains all of the counties and/or agencies associated to the worker.

Initiate an Adoption Determination

Step	Action
1	In the <i>Left Navigation</i> panel. <ul style="list-style-type: none"> • Click IV-E Adoption • Click Determinations Needed.
2	In the <i>Determinations Needed</i> table. <ul style="list-style-type: none"> • Click the Counties drop-down arrow. • Select the appropriate County option.
3	From the filtered list in the <i>Determinations Needed</i> table. <ul style="list-style-type: none"> • Click the name link under Child Name to open the desired Adoption Determination page.
4	This opens the <i>Adoption Determination</i> page for the selected client. <ul style="list-style-type: none"> • Navigate through the IV-E Redetermination page using either the options in the left Navigation panel or the scroll bars.
5	In the header for <i>Demographics</i> . <ul style="list-style-type: none"> • Click Actions. • Select Initiate Redetermination. This will Initiate the Determination.



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Demographics:

- The name displayed in the **Child/Youth Name** column in both the Biological Child Information and Adoptions Child Information rows contain a link to open the Client Details record for the child.

Demographics

Step	Action
1	<p>In the Demographics section.</p> <ul style="list-style-type: none"> • If required, click in the Determination Assigned To field to edit the name of the worker assigned to this Determination. • Select the desired name from the list. • <i>In the Biological Child Information</i> section, click In the Comments text box and enter comments as desired. • <i>In the Adoptive Child Information</i> section, click In the Comments text box and enter comments as desired.
2	Use the links in the left navigation panel or the scroll bar to continue to the Legal Custody section.



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Legal Custody

- The **Legal Custody** section allows the worker to select who has legal custody of the child.
- If Parental rights have been terminated or relinquished, the Event Dates in the **Termination of Parental Rights, Relinquishment Order, or Parental Death** section will be populated from the Trails court order information and will not be editable. If a parent is deceased, the **Event Date** will populate from the Date of Death and **Type** will default to Death.

Legal Custody

Step	Action
1	<p>In the Legal Custody section.</p> <ul style="list-style-type: none"> • Click the Legal Custody drop-down arrow. • Select the appropriate option from the list. • If Tribe is selected. <ul style="list-style-type: none"> ○ In the Tribe* text field, enter the Tribe that has legal custody of the child. ○ Click the Yes or No toggle for Does Tribe wish to seek IV-E funds? <ul style="list-style-type: none"> ▪ If No, all remaining fields in all panels in the determination record become disabled with the exception of the Actions options in <i>Notes</i> and <i>Eligibility Summary</i>. ▪ If Yes, enter a date with a MM/DD/YYYY format or enter the date using the calendar option in the Date Tribe Obtained Legal Custody*.



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2	<p>In the Termination of Parental Rights, Relinquishment Order, or Parental Death section</p> <ul style="list-style-type: none">• Click the Event Type* drop-down arrow for Parent 1.• Select the appropriate option from the list.• Click in the Event Date* field for Parent 1.• Type the date with a MM/DD/YYYY format or enter the date using the calendar option.• If available, click the Event Type* drop-down arrow for Parent 2.• Select the appropriate option from the list.• Click in the Event Date* field for Parent 2.• Type the date with a MM/DD/YYYY format or enter the date using the calendar option.• Click Yes or No toggle for Was there a finding of ‘reasonable efforts’ to find and finalize permanent placement within 12 months of the child’s placement or since the last Court Order with REFPP?* <p>Note: Parent information is auto-filled based on TPR order for Parent 1 or client relationship of Mother (Biological). Parent 2 Name may be blank if “No Second Parent Identified” is selected for the Type of Event.</p>
3	<p>Use the links in the left navigation panel or the scroll bar to continue to the Special Needs section.</p>



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Special Needs

- The Special Needs section will be disabled if **Tribe** was selected for Legal Custody and the Tribe is not seeking IV-E funds.

Special Needs

Step	Action
1	<p>In the Special Needs List section.</p> <ul style="list-style-type: none"> Click Yes or No toggle for Has the county determined that the child cannot or should not be returned to the home of his/her parent(s)? <ul style="list-style-type: none"> If No, Eligibility Status is not eligible. If Yes, continue to next question. Click Yes or No toggle for Did your agency make a reasonable effort to place the child without providing adoption assistance unless the best interests of the child would not be served by such an effort? <ul style="list-style-type: none"> If No, Eligibility Status is not eligible. If Yes, continue to next question. Click the appropriate checkbox(es) for Steps taken to place child for adoption without adoption assistance. Choose all that apply. This is a multi-choice question. Check all that apply. Click the appropriate checkbox(es) for Best interest of the child would not be served by such efforts for one of the following reasons. Choose all that apply. This is a multi-choice question. Check all that apply. Click In the Comments text box. Comments are required. Enter appropriate comments. Click Yes or No toggle for Does a specific factor or condition exist, which makes it reasonable to conclude that the child cannot be placed with the adoptive parents without providing adoption assistance or Title XIX Medicaid?* <ul style="list-style-type: none"> If No, Eligibility Status is not eligible. If Yes, continue to Special Conditions. Click the Special Conditions* drop-down arrow for Parent 1. Select the appropriate option(s) from the list. This is a multi-select field and any or all options can be selected. Click In the Comments text box. Comments are required. Enter appropriate comments.



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4	Use the links in the left navigation panel or the scroll bar to continue to the Eligibility Factors section.
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Eligibility Factors

- The Eligibility Factors section will be disabled if **Tribe** was selected for Legal Custody and the Tribe is not seeking IV-E funds.
- If a value is selected from the **Eligibility Factor** picklist, and the worker subsequently chooses a different value, then if the worker has answered any of the questions on the page a message will display “Changing the selection will change the questions on this panel and all information already entered on the panel will be lost. Do you want to continue? Y/N.
 - If **Yes** is chosen, this will delete any answers that were already entered on this panel and display the panel with the new questions for the selection.
 - If **No** is chosen, the message closes and the panel retains the previous answers.

Eligibility Factors

Step	Action
1	<p>In the Eligibility Factors section.</p> <ul style="list-style-type: none"> • Click the Eligibility Factor* drop-down arrow . • Select the appropriate option from the list. • If Child in Foster Care via Court Ordered Removal is selected, the following additional questions will be visible and required. <ul style="list-style-type: none"> ○ Click Yes or No toggle for Is the child currently eligible for Title IV-E in foster care on the Title IV-E Initial Eligibility Determination? <ul style="list-style-type: none"> ▪ If No, an additional question will be made visible and required. ▪ If Yes, panel turns green. ○ Click Yes or No toggle for Does the child meet the age requirement for de-linking the AFDC Income criteria from the child’s IV-E Eligibility? <ul style="list-style-type: none"> ▪ If No, an additional question will be made visible and required. ▪ If Yes, Eligibility Status is not eligible. ○ Click Yes or No toggle for Was the judicial finds requirement met for continuation in the home would be contrary to the welfare of the child or removal from home is in the best interests of the child? <ul style="list-style-type: none"> ▪ If No, Eligibility Status is not eligible. ▪ If Yes, panel turns green.



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In the **Eligibility Factors** section (*con't*)

- Click In the **Comments** text box. Comments are required.
- Enter appropriate comments.
- Click Yes or No toggle for **Does a specific factor or condition exist, which makes it reasonable to conclude that the child cannot be placed with the adoptive parents without providing adoption assistance or Title XIX Medicaid?***
 - If **No**, Eligibility Status is not eligible.
 - If **Yes**, continue to **Special Conditions**.
- In the **Eligibility Factor*** drop-down arrow .
- If **SSI Eligibility** is selected, the following additional question will be visible and required.
 - Click Yes or No toggle for **For children in the custody of county department, relative, Tribe, or a licensed Non-Profit Child Placement Agency (CPA), the child’s SSI eligibility must be determined prior to finalization of the adoption. Is child SSI eligible?***
 - If **No**, Eligibility Status is not eligible.
 - If **Yes**, panel turns green.
- If **Child IV-E Eligible in Previous Adoption?** is selected, the following additional question will be visible and required.
 - Click Yes or No toggle for **Was child IV-E eligible in a previous adoption?***
 - If **No**, Eligibility Status is not eligible.
 - If **Yes**, panel turns green.
- If **Child in Mutual Foster Care with County Department via Court Ordered Removal** is selected, the following additional question will be visible and required.
 - Click Yes or No toggle for **Is the child’s current placement receiving Title IV-E foster care payment that covers both the teen parent and the child?***
 - If **No**, Eligibility Status is not eligible.
 - If **Yes**, panel turns green.



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In the **Eligibility Factors** section (*con't*)

- If **Initial Removal via Voluntary Placement** is selected, the following additional question will be visible and required.
 - Click Yes or No toggle for **Was a voluntary placement agreement (CWS-3) signed by the parent(s) or legal guardian and a representative of the county department?***
 - If **No**, Eligibility Status is not eligible.
 - If **Yes**, the following additional questions will be visible and required.
 - Click in the **VPA (CWS-3) Date Signed*** field.
 - Type the date with a MM/DD/YYYY format or enter the date using the calendar option.
 - Click Yes or No toggle for **Did the child meet the AFDC eligibility requirement at the time the child was placed in out-of-home care?***
 - If **No**, Eligibility Status is not eligible.
 - If **Yes**, the following additional questions will be visible and required.
 - Click Yes or No toggle for **Does the child meet the age requirement for de-linking the AFDC criteria from the child's IV-E Eligibility?*** The answer is automatically set to Yes and disabled if previous question was answered Yes, otherwise required.
 - Click Yes or No toggle for **Was at least one Title IV-E Foster Care payment made on behalf of the child?***
 - If **No**, Eligibility Status is not eligible.
 - If **Yes**, panel turns green.



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- If **Child Voluntarily Relinquished to a Public or Licensed Non-Profit Child Placement Agency** is selected, the following additional question will be visible and required.
 - Click the **Child Relinquished To*** drop-down arrow.
 - Select the appropriate option.
 - Click Yes or No toggle for **Was there a petition to remove the child from his/her home within 6 months of the date that the child lived with the specified relative from whom the child was removed?***
 - If **No**, Eligibility Status is not eligible.
 - If **Yes**, the following additional questions will be visible and required.
 - Click in the **Date Signed*** field.
 - Type the date with a MM/DD/YYYY format or enter the date using the calendar option.
 - Click Yes or No toggle for **Was there a subsequent judicial determination indicating that placement out-of-the home is in the best interests of the child OR continuation in the home is contrary to the child's welfare?**
 - If **No**, Eligibility Status is not eligible.
 - If **Yes**, panel turns green and the following question becomes visible and enabled.
 - Click in the **Date Signed*** field.
 - Type the date with a MM/DD/YYYY format or enter the date using the calendar option.

Use the links in the left navigation panel or the scroll bar to continue to the **Assistance Agreement** section.



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Assistance Agreement

- The Assistance Agreement section will be disabled if **Tribe** was selected for Legal Custody and the Tribe is not seeking IV-E funds.

Assistance Agreement

Step	Action
1	<p>In the Assistance Agreement section.</p> <ul style="list-style-type: none"> • Click Yes or No toggle for Single Parent Household? • Click in the Date Signed by the Adoptive Parent 1* field. • Type the date with a MM/DD/YYYY format or enter the date using the calendar option. • Click in the Date Signed by the Adoptive Parent 2* field. This field is conditionally enabled and required if the answer to Single Parent Household is No. • Type the date with a MM/DD/YYYY format or enter the date using the calendar option. • Click in the Date Signed by the County Representative* field. • Type the date with a MM/DD/YYYY format or enter the date using the calendar option. • Click in the Signature date of the Final Decree of Adoption signed by the Judge or Magistrate* field. • Type the date with a MM/DD/YYYY format or enter the date using the calendar option. • The Yes or No toggle for Was the adoption assistance agreement signed by the adoptive parent(s) and a county agency representative on or before the judge finalized the adoption? Is calculated based on the dates provided above. <ul style="list-style-type: none"> ○ If No, Eligibility Status is not eligible. • Click In the Comments text box. Comments are optional. • Enter appropriate comments.
	<p>Use the links in the left navigation panel or the scroll bar to continue to the Eligibility Summary section.</p>



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Eligibility Summary

- The *Accept and Lock Determination* cannot be executed until all determination factors have been completed. If any determination factors are not complete, a message will display stating: “One or more Determination Factors are incomplete”.
- The IV-E Edit Log displays the eligibility for the current removal episode.
- The **Eligibility Determination** section is read-only.

Eligibility Summary

Step	Action
1	<p>Accept and Lock Determination</p> <p>In the Eligibility Factors section header.</p> <ul style="list-style-type: none"> • Click Actions. • Select Accept and Lock Determination. If all requirements for the Determination are met, a pop-up window will display. • Click Lock for <i>Do you want to continue?</i> or click Cancel to close the pop-up window and not lock the record.
2	<p>Unlock Determination</p> <p>If the record is locked, selecting Unlock Determination will unlock the record, and return it to Pending Determinations.</p> <ul style="list-style-type: none"> • Click Actions. • Select Unlock Determination • Click Unlock or Cancel to close and not unlock the record.
4	<p>View IV-E Edit Log.</p> <ul style="list-style-type: none"> • Click Actions. • Select View IV-E Edit Log. • Click Done when review is complete or Cancel to close.
6	Use the links in the left navigation panel or the scroll bar to continue to the Notes section.



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Notes

- In the **Note Summary** section, the **Created Date**, **Created By**, **Updated Date**, and **Updated By** are auto-filled and cannot be edited.

Notes

Step	Action
1	<p>Add a Note</p> <p>In the Notes section header.</p> <ul style="list-style-type: none"> • Click Actions. • Select Add Note. <p>This opens the Note Summary page.</p>
2	<p>In the Note Summary section.</p> <ul style="list-style-type: none"> • Click in the Date Occurred field. • Type the date with a MM/DD/YYYY format or enter the date using the calendar option. • Click in the Time Occurred field. • Use the up and/or down time spinners to change the time. • Click in the Completed By field and scroll-over the name displayed. • Type the name in the field. • Click the County/Agency drop-down arrow. • Select the appropriate option from the list. • Click the Purpose drop-down arrow. • Select the appropriate option from the list. • Click the Method drop-down arrow. • Select the appropriate option from the list. • Click the Location drop-down arrow. • Select the appropriate option from the list. • Click the Status drop-down arrow. • Select the appropriate option from the list. • Click In the Comments/Summary text box. Comments are required. • Enter appropriate comments. • When all Notes are completed, select Save and Return to IV-E Eligibility to save the changes or Cancel to exit without saving.



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3	<p>Edit a Note</p> <p>In the Note Summary section.</p> <ul style="list-style-type: none">• Click the link for the Entered Date. This will open the Note Summary section.• Make edits as needed.• Select Save & Return to IV-E Eligibility to add the changes or Cancel to exit without saving.
4	<p>Delete a Note</p> <p>In the Note Summary section.</p> <ul style="list-style-type: none">• Click the link for the Entered Date. This will open the Note Summary section.• Select Delete to delete the Note.• In the Warning pop-up window, click Yes to delete the Note or No to cancel without deleting.
5	<p>Use the links in the left navigation panel or the scroll bar to continue to the Entitlements section.</p>



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Entitlements

- The **Entitlements** page can also be accessed from the Client Details page.
- The Entitlements section will be disabled if **Tribe** was selected for Legal Custody and the Tribe is not seeking IV-E funds.

Entitlements

Step	Action
1	<p>In the Entitlements section.</p> <ul style="list-style-type: none"> • Click the Filter By: drop-down arrow. • Select the appropriate filter option. <p>This will display the filtered Entitlements in the table. .</p>
2	<p>Add an Entitlement</p> <p>In the Entitlement section header.</p> <ul style="list-style-type: none"> • Click Actions. • Select Add Entitlement. <p>This opens the Add Entitlement pop-up window.</p> <ul style="list-style-type: none"> • Click in the Start Date field. • Type the date with a MM/DD/YYYY format or enter the date using the calendar option. • If applicable, click in the End Date field. • Type the date with a MM/DD/YYYY format or enter the date using the calendar option. • Click the Entitlement drop-down arrow. • Select the appropriate option from the list. • Click the County/Agency* drop-down arrow. • Select the appropriate option from the list. • Click the Status* drop-down arrow. • Select the appropriate option from the list. • Click In the Comments text box. • Enter appropriate comments. • Click Add when finished or Cancel to close without saving.



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3	<p><i>Edit an Entitlement</i></p> <p>In the Entitlements section.</p> <ul style="list-style-type: none">• Click the link for the Start Date. This will open the Edit Entitlement pop-up window.• Make edits as needed.• Select Save to add the changes or Cancel to exit without saving.
4	<p><i>Delete an Entitlement</i></p> <p>In the Entitlements section.</p> <ul style="list-style-type: none">• Click the link for the Start Date. This will open the Edit Entitlement pop-up window.• Select Delete to delete the Entitlement.• In the Warning pop-up window, click Yes, Delete to delete the Note or Cancel to cancel without deleting.