



# Storyboard

## Entering Adoption Finalization Hearing/Court Order, Adoption Case Finalization and Case Closure

This storyboard demonstrates how to enter an Adoption Finalization Court Hearing, Adoption Finalization Court Order, Adoption Case finalization and case closure in TFACTS.

### Table of Contents

Pre-Finalization Tasks to Complete.....	2
Entering Forwarding Address.....	2
Add Court Action-Hearing.....	3
Linking the Final Order of Adoption.....	4
Verify Legal Status Updated.....	5
Verify Foster Care Placement Ended.....	5
Restricting an Adoption Case in Preparation for Case Closure.....	6
Navigate to the Adoption Case.....	6
Finalization/Case Closure Tab.....	7
Finalization Checklist.....	8
Closing the Case.....	11

# Entering Adoption Finalization Hearing/Court Order, Adoption Case Finalization and Case Closure

## Step 1: Pre-Finalization Tasks to Complete

The following tasks must be completed prior to finalizing an Adoption:

1. The child must have a legal status of **DCS Full Guardianship**.
2. The child must have a sole or dual Permanency Goal of **Adoption**.
3. An **Adoption Case** must be created, and the child placed in the case.
4. The child's current placement in the adoptive home and the **Intent to Adopt** date must be recorded in the **Placement** record.
5. The **Petition to Adopt** pleading in the **Case Court Actions** screens must be entered.
6. The Permanency Specialist will create the subsidy record and enter the applicable information in the **Subsidy Criteria** tab.
7. The Revenue Maximization Specialist will determine eligibility in the subsidy record.
8. The Permanency Specialist will secure approval of the subsidy record, once the Revenue Maximization Specialist has determined eligibility.

**NOTE:** The actions outlined in **Step 7** (#'s 1-18) MUST BE COMPLETED prior to obtaining approval of the subsidy record in order to allow the child's adoptive name to display on the TFACTS-generated Adoption Assistance Agreement.

**NOTE:** The following action steps are not completed in TFACTS but must be completed prior to finalization of the adoption.

- Submit the request to search the **Putative Father Registry** as soon as possible, but at least 10 days prior to filing of the Petition to Adopt (see DCS policy 15.4). Use Form CS-0435 on the server should be submitted to [EI-DCS.Putative.Father.Regist@tn.gov](mailto:EI-DCS.Putative.Father.Regist@tn.gov).
- The **Confidential Court Report** form, CS-0816, found on the server must be completed, signed by the Permanency Specialist and Supervisor, and submitted to court.
- The **Consent to Adopt** form CS-0815, found on the server, must be completed and included in the Confidential Court Report Packet.

## Step 2: Entering Forwarding Address

After the adoption has finalized, a forwarding address must be added. **Do not change an existing address from the prior address type (i.e Residence, Removal, Last Known Address, etc.) to Forwarding.** The Forwarding address should be the address of the adoptive family. In addition, the address of the adoptive family should also be entered as a Residence address for the child and marked as **Primary**.

1. Navigate to the **Person Home Page** of the youth exiting custody.
2. Click the **Person** link.
3. Click the **Address** Tab.

4. Click **Add Address** to add the Forwarding Address where the youth will reside upon adoption; this should be the same as their Residence address.
5. Complete applicable fields on **Domestic Address Search** screen and click **Search**.
6. The **Domestic Address Search Results** display.
7. **Select** the existing address from the results or **Save New Address** if the correct address is not available in the results.
  - a. If you selected **Save New Address**, the **Domestic Address Details** screen will display.
  - b. Ensure the information is correct and the **County** is included, enter information in additional fields, if needed, and click **Save**.
8. Choose **Forwarding** for **Address Type**.
9. Enter the adoption finalization date as the **Effective Date**.
10. Do NOT enter an **End Date**.
11. Click **Save**.

### Step 3: Add Court Action-Hearing

#### Navigate to the Adoption Case

1. From the Home screen select the open, Adoption case. The **Case Overview** screen displays.
2. Click the **Court** link. The **Case Members Legal History** screen displays.
3. Click the **Case Court Actions** link. The **Case Court Actions** screen displays.
4. Click **Search**. The **Court Actions History** grid displays.
5. In the **Action Category** drop down menu at the bottom of the **Court Actions History** grid, choose **Create Hearing** and click **Add Action**.
6. The **Hearing Information** screen displays.
  - a. Enter the **Court Docket #**.
  - b. For **Hearing Type**, select **Adoption Finalization**.
  - c. Enter the **Date Order Filed with Court Clerk**.
  - d. Click **Add Hearing Segment**.
    - i. Enter the **Hearing Begin Date, Hearing End Date**, and **Narrative**.
    - ii. In **Court Hearing Attendees**, conduct a **Person Search** to identify and **choose** the DCS Representative present at the hearing.
    - iii. Click to highlight the **Case Members** who were present and click **Add** to move them from the **Non Attendees** box to the **Attendees** box.
    - iv. Additional attendees can be documented in freeform text field **Others in Attendance**, if applicable.
    - v. Click **OK**.
  - e. In **Hearing Concerning Child(ren)**, select the appropriate **Case Members** and click **Add**.
  - f. Click **Apply**.
  - g. TFACTS will remind the user to enter **Court Information**.

7. Click on **Court Information**. The **Court Information** screen displays.
  - a. Choose the **County**.
  - b. Choose the **Court**.
  - c. Choose the **Judge Name**.
  - d. Under **Representative**, choose a **Type** of **Non-DCS Attorney**.
  - e. Conduct a **Person Search** to identify and choose the attorney who represented the adoptive parent(s).
  - f. Select the child in the **Represents** field. Click **Add**.
  - g. Repeat steps 7. d-f to add each representative present.
  - h. Click **Save**.
8. The **Case Court Actions** screen displays the **Adoption Finalization Hearing** in the **Court Actions History** grid.

## Step 4: Linking the Final Order of Adoption

### Navigate to the Adoption Case

1. On the **Case Court Actions** screen, click **Search**.
2. Click **Link Court Action** next to the **Adoption Finalization Hearing**.
3. The **Hearing Information** screen displays. At the bottom, choose **Order** from the **Link Court Action** dropdown.
4. Click **Add Action**.
5. The **Court Order** screen displays.
  - a. The **Court Docket #** should display the same **Court Docket #** entered in the **Court Hearing**.
  - b. For **Court Order and Other Types**, choose **Adoption Finalization**.
  - c. Under **Court Order Concerning**, select the applicable child(ren) and click **Add**.
  - d. Enter **Date Order Signed**.
  - e. Enter **Date Order Received by DCS**.
  - f. If a certified copy of the order has been received, check **Certified Copy Received**.
  - g. Click **Apply**.
6. Under **Adjudication/Finding**, click **Add Adjudication/Finding**.
7. The **Adjudication/Court Findings Details** screen displays.
  - a. Next to **Person Concerning**, choose the applicable child.
  - b. Under **Court Findings**, choose **Adoption Finalization** from the **Finding** dropdown and enter a **Finding Date**.

**NOTE:** TFACTS uses the “**Adoption Finalization**” **Finding Date** to set the **Legal Status End Date**, **Placement End Date**, **Subsidy Effective Date**, **Removal Record End Date**, and **Adoption Finalized Date**.

- c. Click **OK**.

**NOTE:** The order may only be saved if every **Child Concerning** also has an **Adoption Finalization Finding**. If a finding has not been entered for every **Child Concerning**, TFACTS will display a data validation message prompting the user to add an **Adoption Finalization Finding**.

8. On the **Court Order Details** screen, click **Save**.
9. TFACTS may display a message advising the user that saving the Adoption Finalization Order will end the custodial episode and asking the user to verify if they wish to proceed. Click **OK**.
10. The **Case Court Actions** screen displays. Click **Search**.
11. The **Adoption Finalization Court Order** displays in the **Court Actions History** grid.

## Step 5: Verify Legal Status Updated

### Navigate to the Adoption Case

1. From the Home screen select the open, Adoption case. The **Case Overview** screen displays.
2. Click the **Court** link. The **Case Members Legal History** screen displays.
3. Under **Case Members**, the legal status for the child(ren) displays. The **Current/Last Legal Status** should reflect an **End Date** equal to the date of adoption finalization.
4. Click the **Legal Status** link.
5. On the **Legal Status** tab, click **Select** next to the **Legal Status** of **DCS Full Guardianship**.
6. On the **Child Legal Status Details** screen, the **End Date** should be equal to the child's "**Adoption Finalization**" **Finding Date**, the **End Reason** should reflect **Adoption**, and there should be a response of **Yes** next to **Does Ending this Legal Status End the Custody Episode**.

## Step 6: Verify Foster Care Placement Ended

### Navigate to the Person Home Page

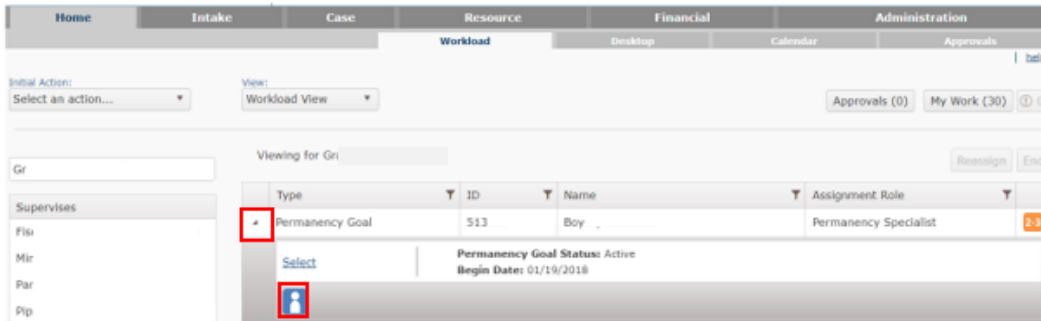
1. From the **Person Home Page** for the child, click on **Current Location**.
2. On the **Location History** screen, the most recent placement record should have an **End Date** equal to the date of adoption finalization.
3. Click to highlight the most recent placement record, and click **Select**.
4. On the **Placement Action Step Detail** screen, verify that the **Placement End Date** is equal to child's "**Adoption Finalization**" **Finding Date** and the **Placement End Reason** equal to **PLANNED-Adoption Finalized**.

## Step 7: Restricting an Adoption Case in Preparation for Case Closure

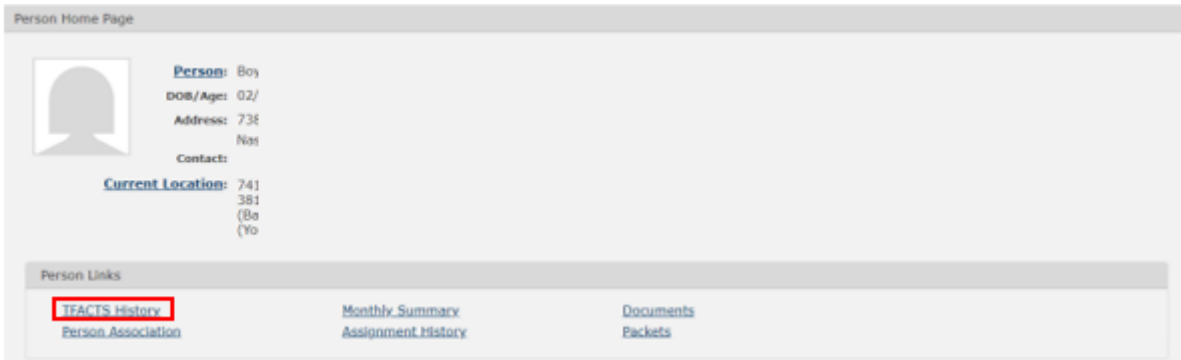
### Navigate to the Adoption Case

On the TFACTS **Home** tab, the **Workload** screen displays.

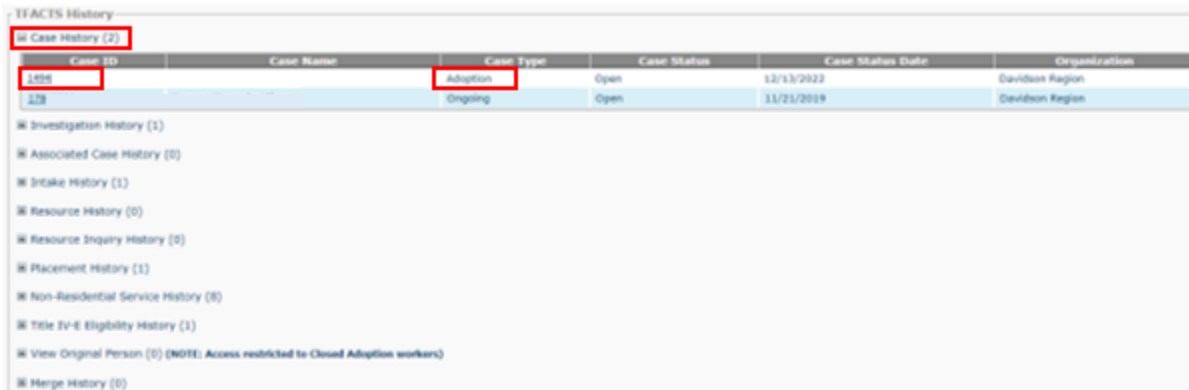
1. Locate the appropriate child's name on the **Workload**.
2. Click the **arrow** to expand the assignment.
3. Click the **person** icon.



4. Click **TFACTS History**.



5. Click **Case History** to expand.
6. Click **Case ID** link for the Adoption Case.

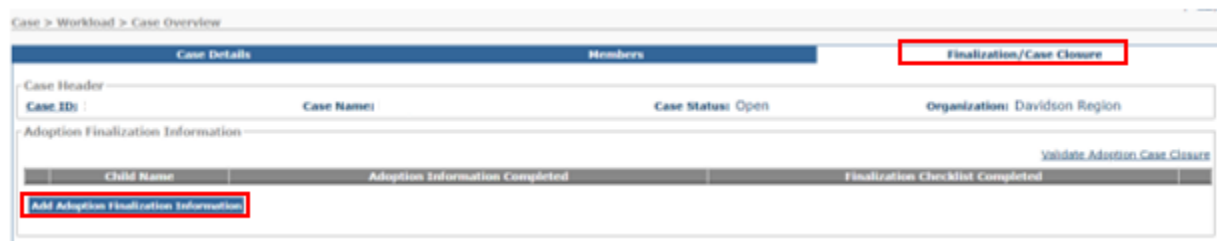


## Finalization/Case Closure Tab

7. The **Case Overview** screen displays.
8. Click the **View Case Details** link.



9. The **Case Information** screen displays.
10. Click the **Finalization/Case Closure** tab.
11. The **Adoption Finalization Information** screen displays.
12. Click the **Add Adoption Finalization Information** button to enter finalization information.



13. The **Child for Adoption Placement/Finalization Details** screen displays.
14. Select the **Child Name** from the drop-down list.
15. Click **OK**.



16. The **Adoption Finalization Details/Case Closure** screen displays.
17. The **Child's Pre-Adoptive Information** auto-populates on the left side of the screen and displays the child's existing **Name**, **Date of Birth**, **SSN**, and **Address**. This information cannot be updated from this screen.
18. The **Child's Adoptive Information** displays the right side of the screen and contains freeform text fields where the child's adoptive information can be entered.
19. The **Child Adoptive Information Address** (on the right) is auto-populated from the placement section where the **Intent to Adopt** is chosen.

**Note:** The **Copy to Adoptive Information** button should not be used, as it can cause unintended data errors.

## TFACTS Storyboard- Entering Adoption Finalization Hearing/Court Order, Adoption Case Finalization and Case Closure

20. Complete the following fields in the **Adoption Information** fields:

- All Recruitment Activity Ended** – Yes or N/A
- Date of Full Disclosure** date
- Adoption Assistance Application Signed** – checkbox
- Click **Apply**

**Note:** Other fields, such as **Intent to Adopt**, will auto-populate and cannot be updated from this screen.

Case Header: Case ID: 14 Case Name: Dic Case Status: Open Organization: Davidson Region

Adoption Finalization Details

**Child's Pre-Adoptive Information**

Name: Un  
Date of Birth: 11  
SSN: 88  
Address: 85 NJ  
Copy to Adoptive Information

**Child's Adoptive Information**

First Name: \*  
Middle Name:  
Last Name: \*  
Suffix:  
SSN:  
Address:

**Adoption Information**

Standard Eligible: N/A  
TV-E FC Eligible: N/A  
Adoption Subsidy Approved Date: 08/05/2021  
All Recruitment Activity Ended:  Yes  N/A  
Date of Full Disclosure: 01/14/2023  
Intent to Adopt:   
Adoption Assistance Application Signed:

**Finalization Checklist**

Petition to Adopt Filed Date: 11/17/2022  
Putative Father Registry Response Date:   
Adoption Finalization Date: 01/15/2023  
Signed Consent to Adopt  
Confidential Court Report Completed  
Court Packet Completed  
Final Decree  
Adoption Assistance Agreement Signed:  Yes  N/A  
Primary Factor for Special Need Determination: \*

Apply Save Cancel

## Finalization Checklist

21. Complete the following fields or checkboxes (if applicable) in the **Finalization Checklist** section

- Petition to Adopt Filed Date** (is a system generated date based on the filed date for the Petition to Adopt in **Court Actions**)
- Putative Father Registry Response Date**
- Adoption Finalization Date** (is a system generated date based on information entered in **Court Actions**)
- Signed Consent to Adopt**
- Confidential Court Report Completed**
- Court Packet Completed**
- Final Decree**
- Adoption Assistance Agreement Signed**
- Primary Factor for Special Need Determination** - select from drop down list



TFACTS Storyboard- Entering Adoption Finalization Hearing/Court Order, Adoption Case Finalization and Case Closure

22. Click **Save**.

23. The **Finalization/Case Closure** tab displays, and the **Adoption Information Completed** and **Finalization Checklist Completed** now display **Yes**.

24. Click the **Approval/Restrict Record** link.

Child Name	Adoption Information Completed	Finalization Checklist Completed	Approval/Restrict record
Cam	Yes	Yes	Approval/Restrict record

25. TFACTS ensures the Adoption Case is complete and displays any missing information on the **Adoption Case Closure Validation Details** grid. Any unresolved items must be addressed before proceeding with case closure and submitting for supervisor approval.

26. If no unresolved items are found, click **Submit for Approval** to route for approval.

27. The **Process Approval** screen displays.

28. Choose the appropriate **Action** from the dropdown.

29. Choose the appropriate for each dropdown if required:

- Organization Category**
- Organization**
- Team**
- Reviewers/Approvers**

TFACTS Storyboard- Entering Adoption Finalization Hearing/Court Order, Adoption Case Finalization and Case Closure

30. Click **Save**.

**Note:** After approving, approvers should see the message “**Successfully add new PersonId=XXXXX & also added the person to the ProviderId=XXXXX**”. This message provides the newly created post-adoptive Person ID and notification that the Person ID has been added as a Member to the Resource Home of the Adoptive Parents. If you do not see this message, contact your FCCR.

31. ✱The Permanency Specialist will navigate to the **Person Profile** for the child’s adoptive identity by conducting a **Person Search** using the child’s newly created adoptive ID. On the **Demographics** tab, the Permanency Specialist will verify that the child’s **Race** is present, as well as a response to the **Hispanic/Latino** field under **Ethnicity/Ancestry**. These responses should mirror the Demographic Information documented in TFACTS in the child’s birth ID. ✱

## Step 8: Closing the Case

1. All Unresolved Items for Closure must be resolved including the following:
  - a. AFCARS adoption elements have been entered for each adopted child.
  - b. All open Service Action Steps have been authorized and end dated.
  - c. There are no unfinished work items, such as pending Safety Assessment, draft status Case Recordings, Legal Status without termination date, etc.
2. From the **Finalization/Case Closure** tab, click **Validate Adoption Case Closure** link. The **Adoption Case Closure Validation Details** displays.
3. If any of the required items are not completed, you must correct those items in the child's Adoption Case and perform the validation again. Repeat this process until all required information is complete.
4. If there are no **Unresolved Item(s) for Closure**, click **Submit for Approval**.

Case > Workload > Case Overview > Placement/Finalization/Case Closure

Case Header

Case ID: 14 Case Name: [redacted] Case Status: Open Organization: Upper Cumberland Region

Adoption Case Closure Validation Details

Unresolved Item(s) for Closure	Message
	There are no unresolved items to be completed for this case; you may submit this case for approval to close the case

Submit for Approval

Close

5. The **Process Approval** screen displays.
6. Choose the appropriate **Action** from the dropdown.
7. Choose the appropriate for each dropdown if required:
  - a. **Organization Category**
  - b. **Organization**
  - c. **Team**
  - d. **Reviewers/Approvers**
8. Click **Save**.

**You have completed this storyboard.**