Storyboard

Entering a Relative Caregiver Episode

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Entering a Relative Caregiver Episode

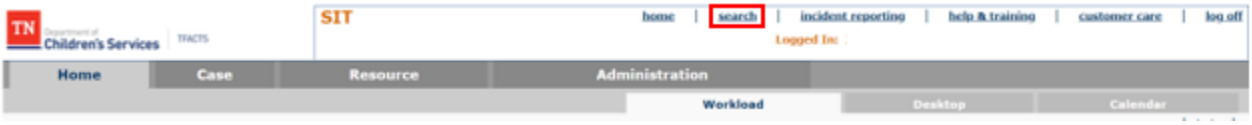
The Purpose of the Relative Caregiver Program is to ensure children and relative caregivers receive support and wrap around services to maintain supportive and stable environments for children. For further information see **Relative Caregiver Program Administrative Policies and Procedures 14.30**

Note: When a new child record and **Relative Caregiver Episode** are created, that person's family Members should be added to the resulting **Family Case**. This is especially important when other children in the family may also need a **Relative Caregiver Episode** to avoid creating multiple **Family Cases** for siblings. After creating one **Relative Caregiver Episode** for one child, ensure all the involved persons are Members of the **Family Case** and then create the **Relative Caregiver Episodes** to avoid creating multiple **Family Cases** when more than one child will receive Relative Caregiver services. Instructions to add members to **Family Case** on page 15.

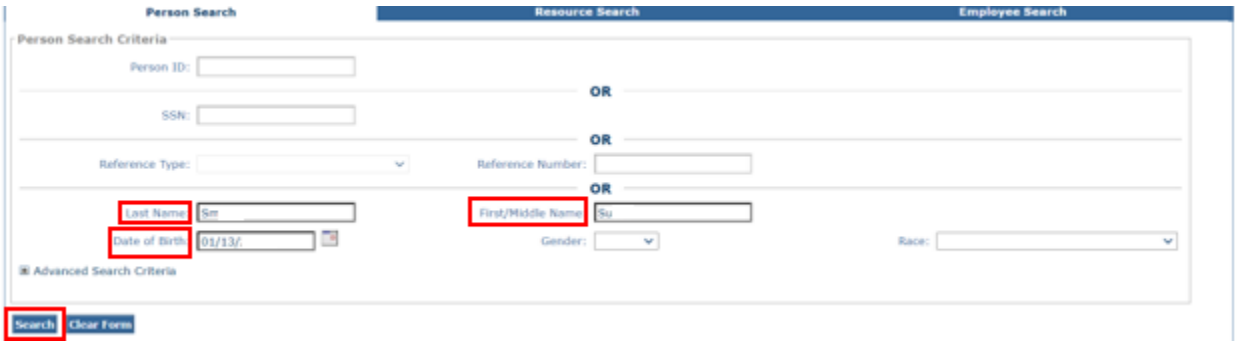
Step 1: Person Search for Child/Youth

From TFACTS Home Page

1. Click **Search** in upper portion of TFACTS screen.



2. Enter search information. Search by **Person ID** number, **SSN**, or by **Last Name**, **First Name**, **Date of Birth**. **Gender** and **Race** may be included if applicable.
3. Click **Search.**



4. If the correct person is returned click the **select** hyperlink and see **Step 2, Adding Relative Caregiver Episode from Person Home Page.**

5. If a match IS NOT returned for the Youth see **Step 2, Adding Relative Caregiver Episode from Initial Action dropdown.**

Step 2: Add Relative Caregiver Episode

There are two options to Add a Relative Caregiver Episode. The Relative Caregiver Episodes may be added for new or existing persons through the **Initial Action** dropdown, Relative Caregiver Episodes for existing persons may also be added through the **Quick Actions** dropdown on the Person Home Page.

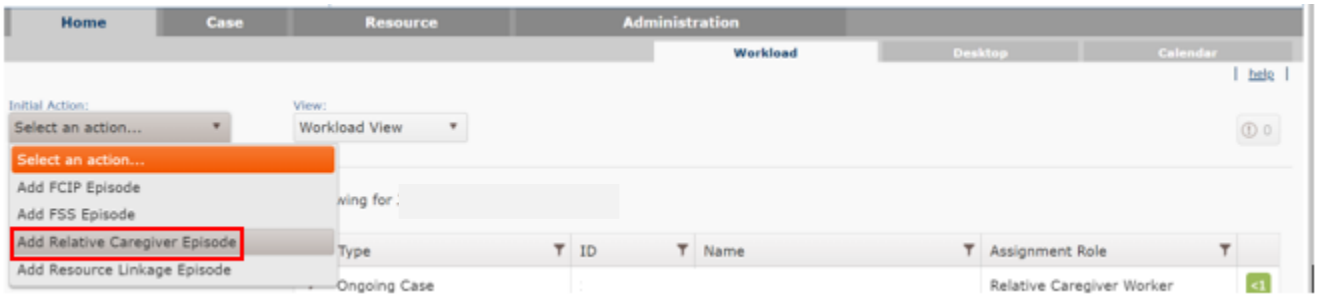
Note: You cannot create a Relative Caregiver Episode for anyone over the age of 18 or you will receive this error:

Adding Relative Caregiver Episode from Person Home Page

1. From the Person Home Page, click the **Quick Actions** dropdown.
2. Click **Add Relative Caregiver Episode**.
3. Proceed to Step 3: Completing the Relative Caregiver Episode.

Adding Relative Caregiver Episode from Initial Action dropdown

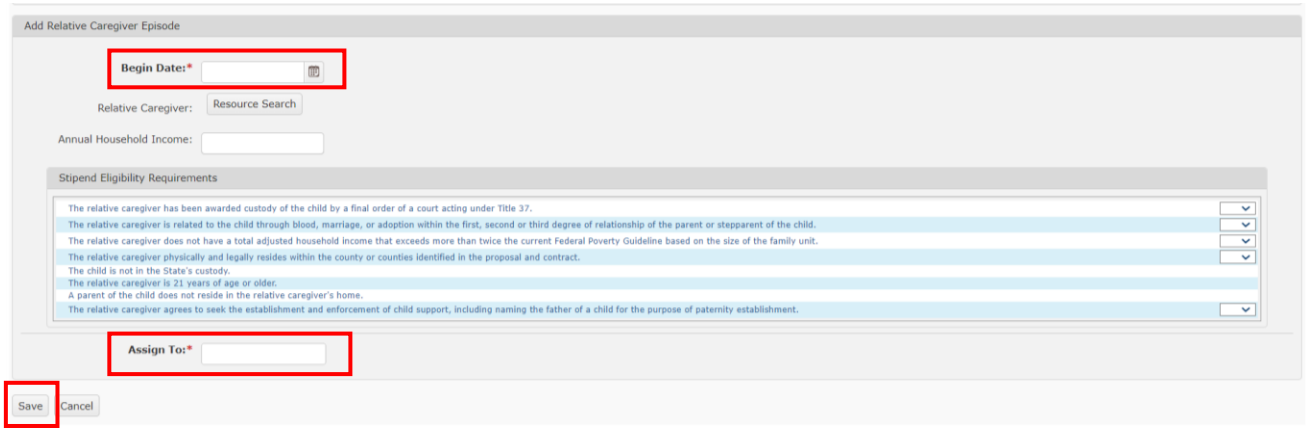
1. From the **TFACTS Home page** click the **Initial Action** dropdown and select **Add Relative Caregiver Episode**



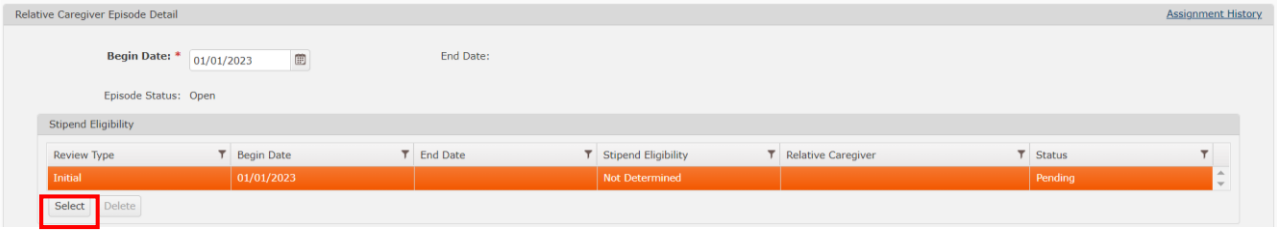
2. If the existing person was located during Person Search, enter the **Person ID** and click **Search**. **OR**
   If a person match <u>was not</u> located, enter the appropriate search criteria, and click **Search**.
3. If no match is returned for the person you are searching, click **Add Person.**
   a. Enter **Name Type**, enter **First Name, Last Name, DOB, SSN, Gender, Race**, and any other information pertinent to this person.
   b. Click **Save.**
4. If a match is returned for the person you are searching, click the **<u>choose</u>** hyperlink**.**

Step 3: Completing the Relative Caregiver Episode

1. From the **Relative Caregiver Episode** page enter the **Begin Date** and **Assign To**
2. Click **Save.**



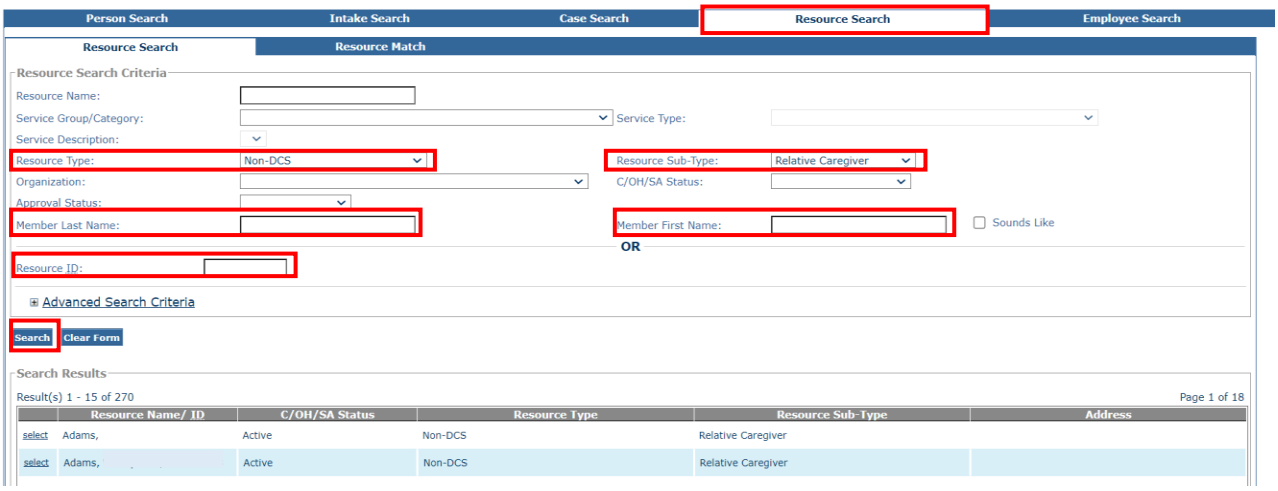
3. The **Relative Caregiver Episode Detail** page will display.
4. Highlight the **Stipend Eligibility** and click the **Select** button.



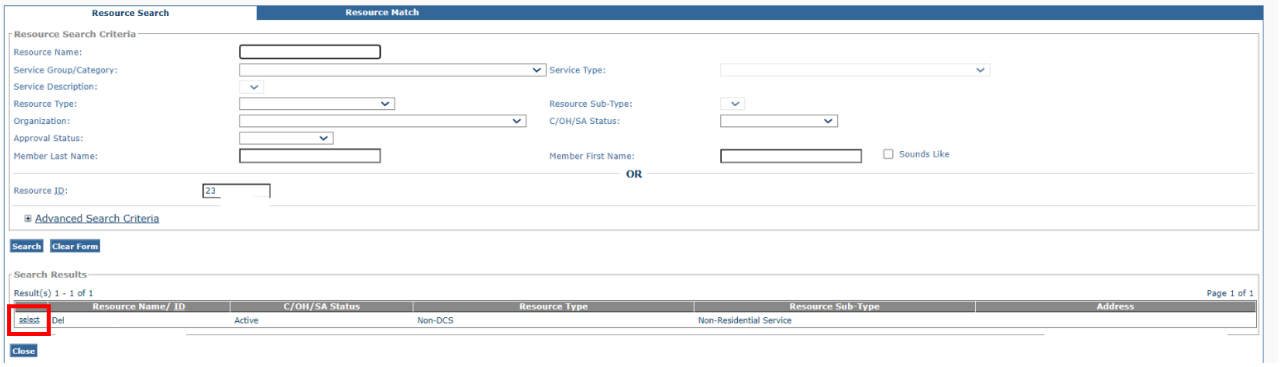
5. The **Stipend Eligibility Detail** screen displays.
6. Click the **Resource Search** button.

7. On the **Resource Search** tab, search by entering **Member Last name, and First Name or/** search selecting **Resource Type: Non-DCS** with **Resource Sub-Type: Relative Caregiver** and it will produce all the Relative Caregivers in the system; click **Search.**

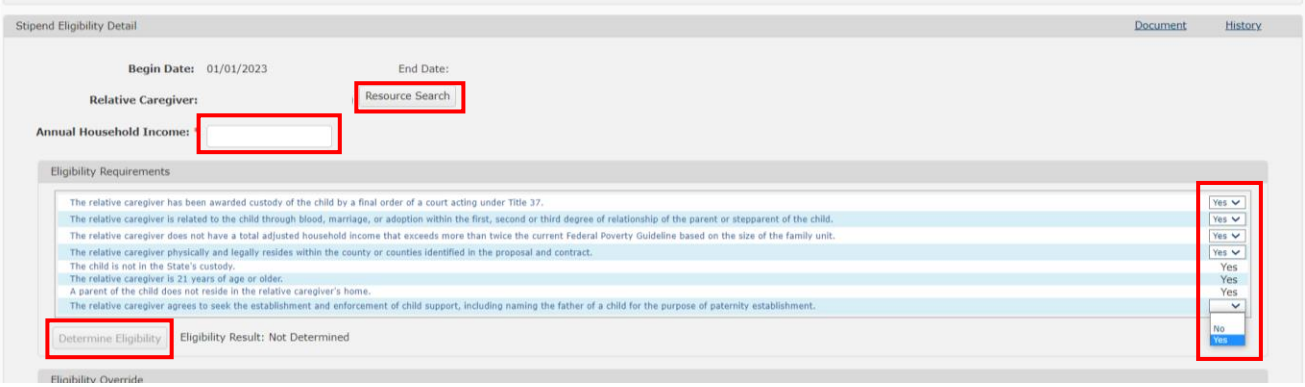
   Other ways to search are by **Member Last name,** only or **Resource ID** only and make sure the **Organization dropdown** is clear.



Search results will display, click the **select** hyperlink by the correct Resource.



8. The **Stipend Eligibility Detail** screen returns, and the Resource displays in the **Relative Caregiver** field.
9. Enter **Annual Household Income**.
10. Complete the **Eligibility Requirements** questions by answering Yes or No from dropdown.
11. Click **Determine Eligibility** button.



The **Eligibility Result** will display **Eligible** or **Ineligible**.

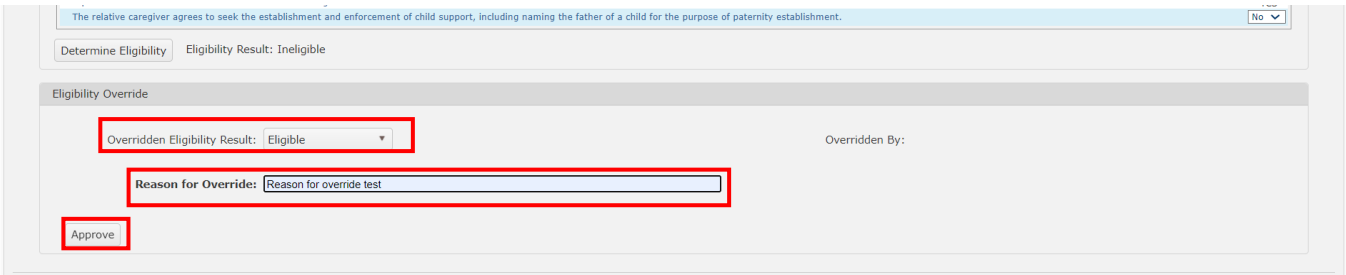
12. Click **Apply**.

Note: If the **Eligibility Result** is **Eligible**, **Service Request** and **Agreement** links will display on the **Stipend Eligibility Detail** screen after clicking **Apply**. **Additionally**, on the **Relative Caregiver Episode Detail** screen, the **Review Type** will change from **Initial** to **Initial (Agreement)**.

13. If an Eligibility result needs to be Overridden proceed to steps below. If not proceed to **Step 4**.

    NOTE: Eligibility Results may be overridden when the obtained Eligibility Result needs to be changed. Eligibility Overrides may be completed for Eligibility Results of **Eligible or Ineligible**.
    If the Eligibility Result is **Eligible, Declined and Ineligible** will be available for selection in the Overridden Eligibility Result dropdown.
    If the Eligibility Result is **Ineligible, Eligible** will be available for selection in the Overridden Eligibility Result dropdown.

14. Choose the correct **Overridden Eligibility** result from the dropdown.
15. Enter **Reason for Override.**
16. Click **Approve.** The Eligibility will be automatically sent to Central office for approval and placed in **Pending Approval** status.



NOTE: **Declined** is the only option that does not require Central Office approval. Choosing Decline proceed to Step 5.

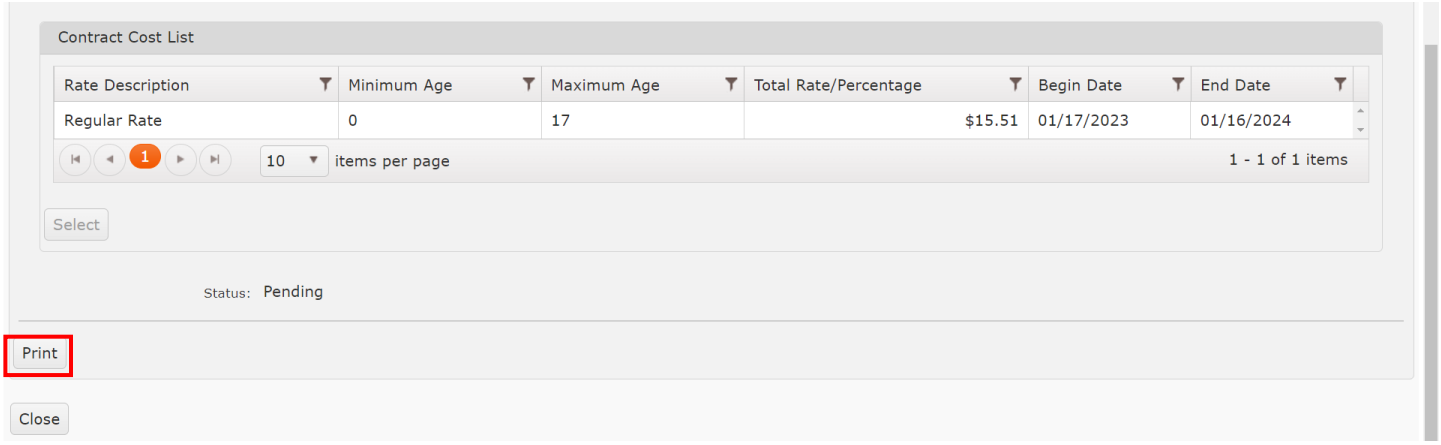
Step 4: Printing the Relative Caregiver Agreement

If the Resource/Relative Caregiver will be receiving a Stipend and their Determination is '**Eligible'**, the **Stipend Agreement** will need to be printed from TFACTS so it may be signed by the Relative Caregiver and uploaded in Step 5. The **Agreement** link will be available for **Eligible** episodes once the Eligibility has been determined and data has been saved by clicking **Apply** or **Save.**

1. From the **Stipend Eligibility Detail** page, click the **Agreement** link.

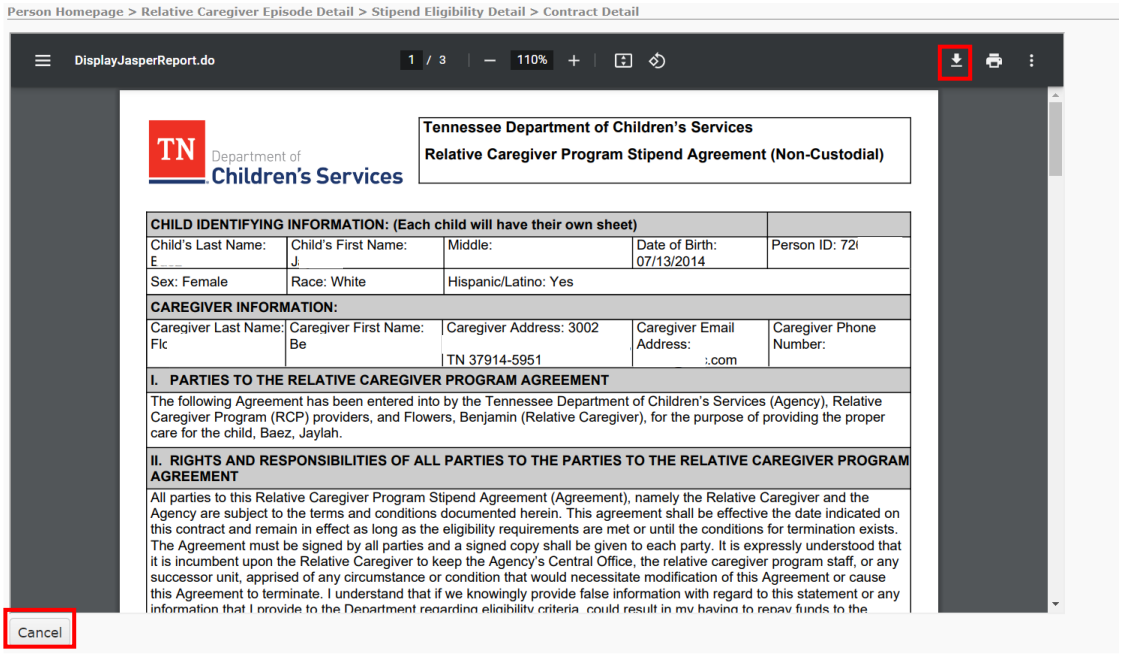
The **Contract Detail** page displays.

2. Scroll to the bottom of the page
3. Click **Print**



Contract Detail PDF displays

4. Click the **Print** Icon to print Agreement
5. Click **Cancel** when complete



Contract Detail screen displays

6. Click **Close** to return to **Stipend Eligibility Detail**

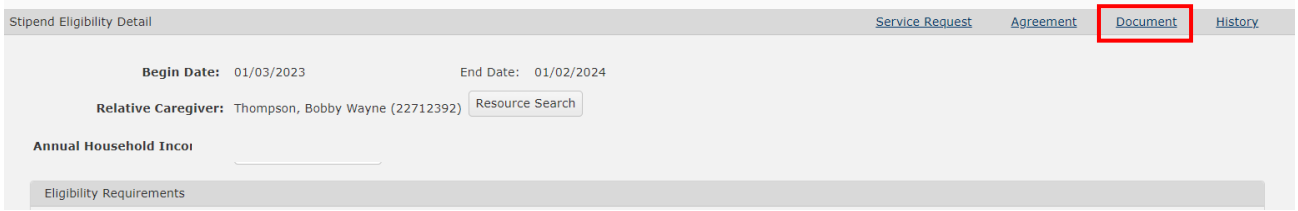
Step 5: Adding Documents

Specific Documents are required if the Resource/Relative Caregiver will be receiving a Stipend and their Determination is '**Eligible**'. There are three documents required to Finalize a Relative Caregiver Stipend Eligibility.

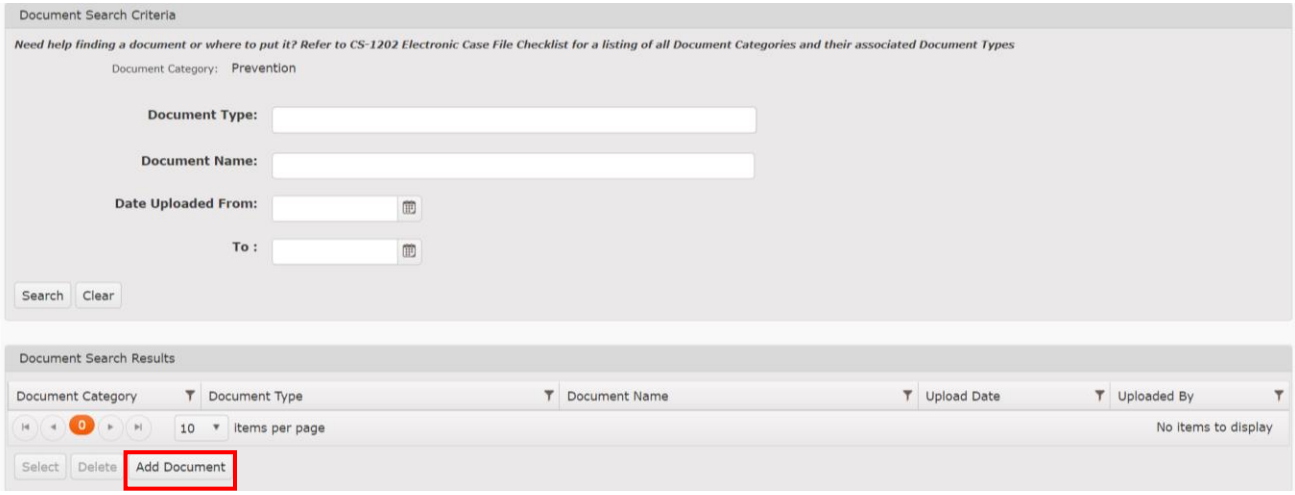
The document types are: **Relative Caregiver Court Order** and **Relative Caregiver Financial Eligibility** are added through the **Document** link**,** and the **Relative Caregiver Program Stipend Agreement** will be added through the **Agreement** link.

Adding Relative Caregiver Court Order and Relative Caregiver Financial Eligibility

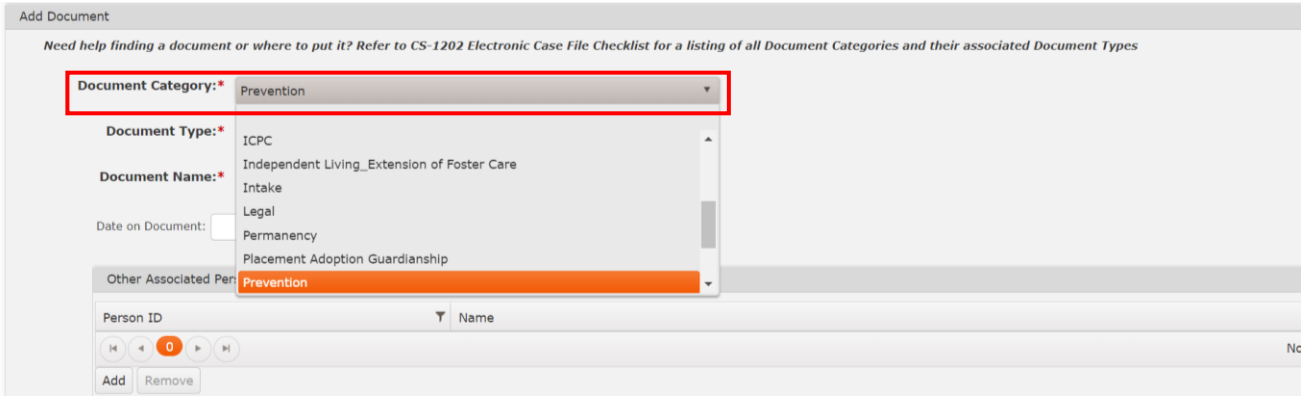
1. From **Stipend Eligibility Detail** screen click the **Document**



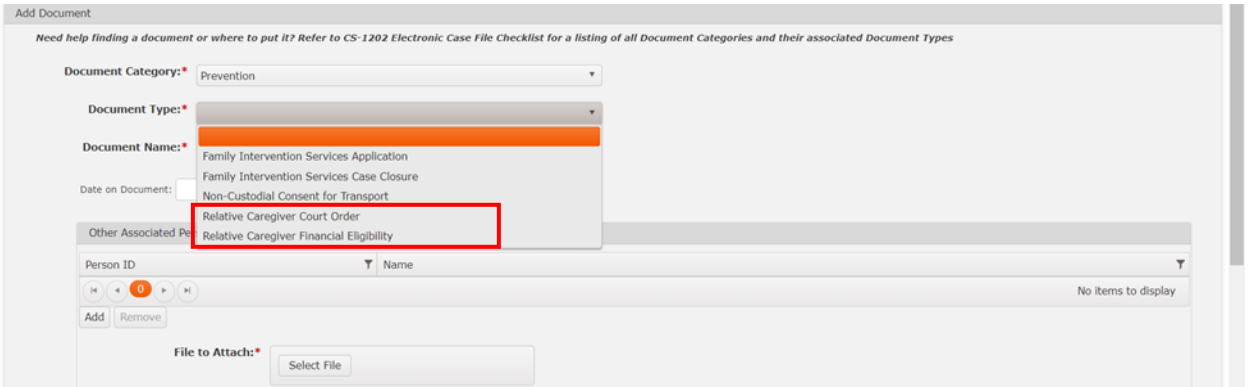
2. Click **Add Document** button.



3. From the **Document Category** choose **Prevention** for **Relative Caregiver Court Order** and **Relative Caregiver Financial Eligibility**.



4. Choose the appropriate **Document Type** (**Relative Caregiver Court Order** or **Relative Caregiver Financial Eligibility**).

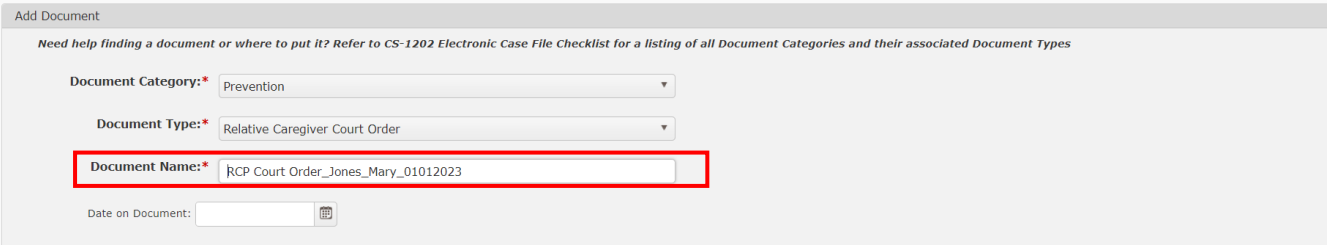


5. **Document Name**

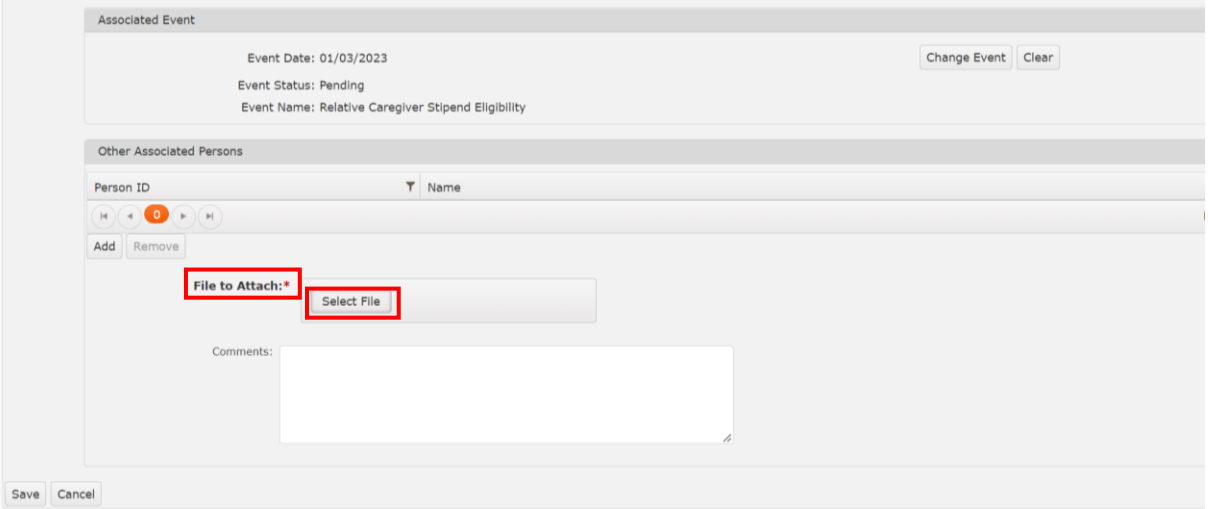
It is necessary that the document name on the computer be unique as TFACTS will not allow a document to be added more than once with the same document name.

The approved naming convention for the **Document Name** (name in TFACTS) is simply the Form Name_Date. **Example: RCP Court Order_Jones_Mary_01012023** or **Mary_Jones Court Order_01012023**

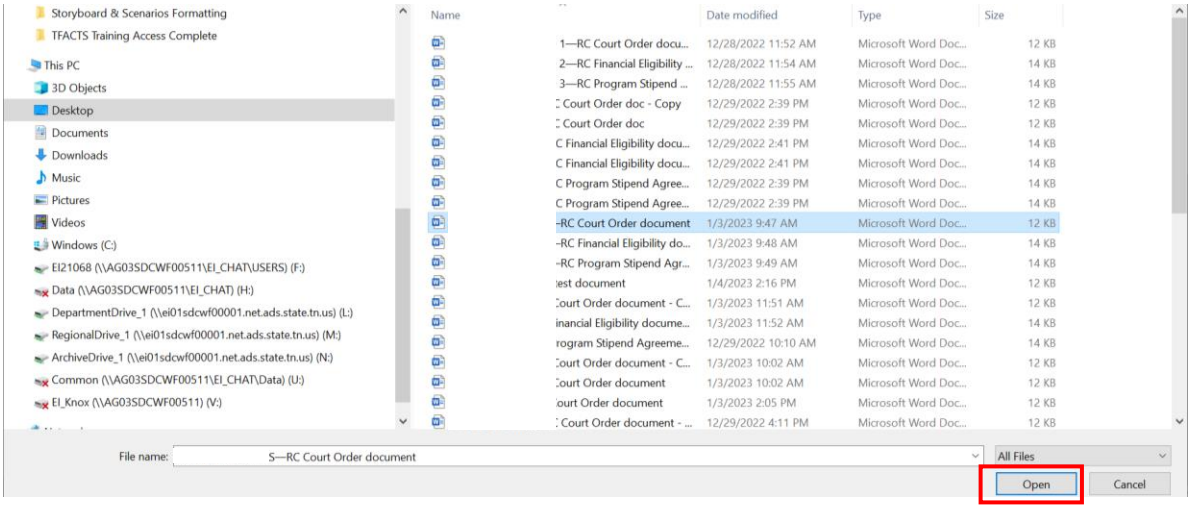
Note: Think of it this way-- Your computer houses the file names, TFACTS is the file drawer. You cannot have two files with the same names in the file drawer.



6. By the **File to Attach** click the **Select File** button.

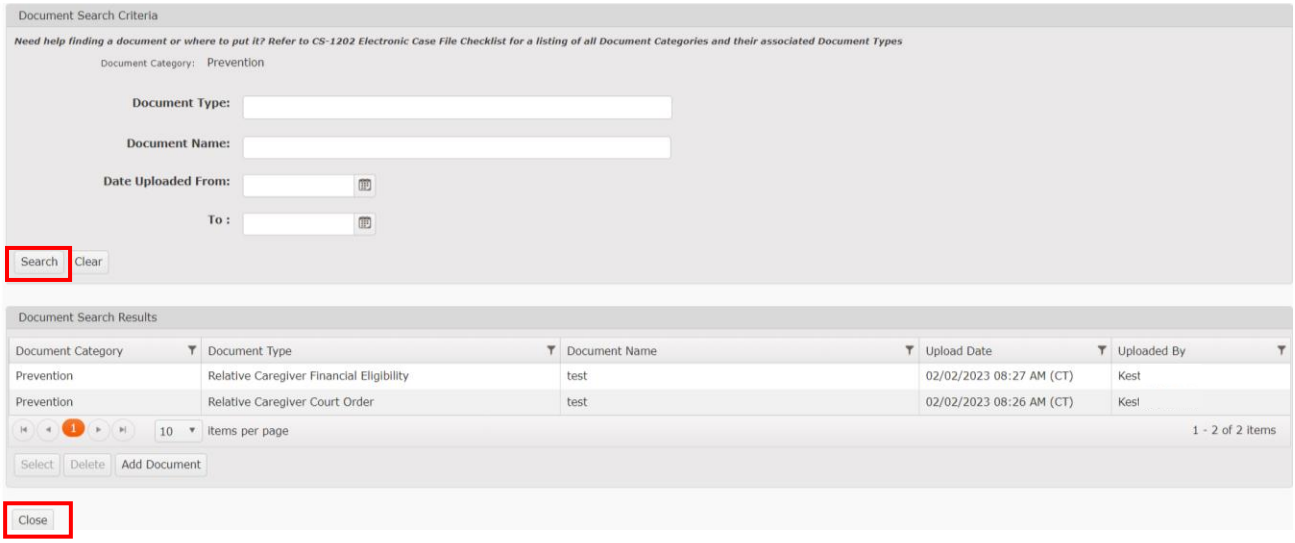


7. A pop up appears, search to locate and click on the **File to attach**; Click **Open**.



8. **Comments** (optional)
9. Click **Save**.

10. **Repeat steps 2-9** above until all required documents are uploaded.
11. Click the **Search** button to view all uploaded documents.
12. Click **Close.** Will return to Stipend Eligibility Detail Screen.



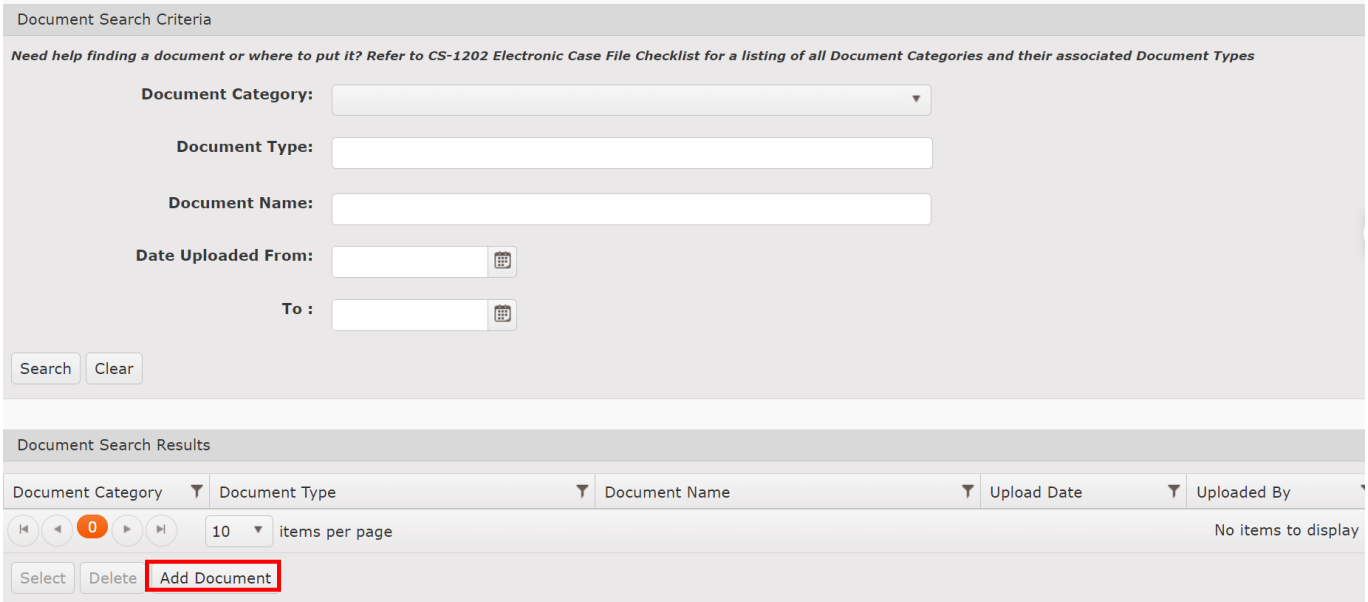
Adding Relative Caregiver Stipend Agreement

1. From **Stipend Eligibility Detail** screen click the **Agreement** link.

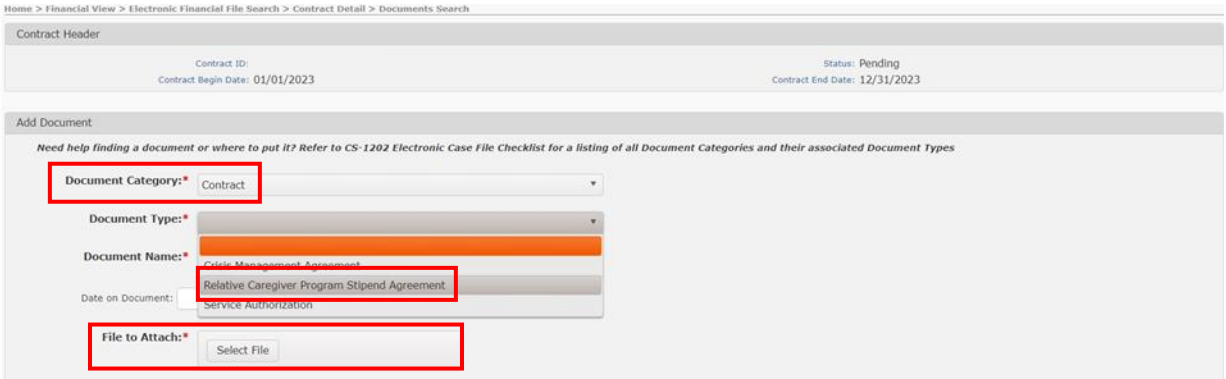
   Note: The **Agreement** link will not display until you have determined eligibility with an **Eligibility Result** of **Eligible** and clicked **Apply**.

2. Click **Documents** link.

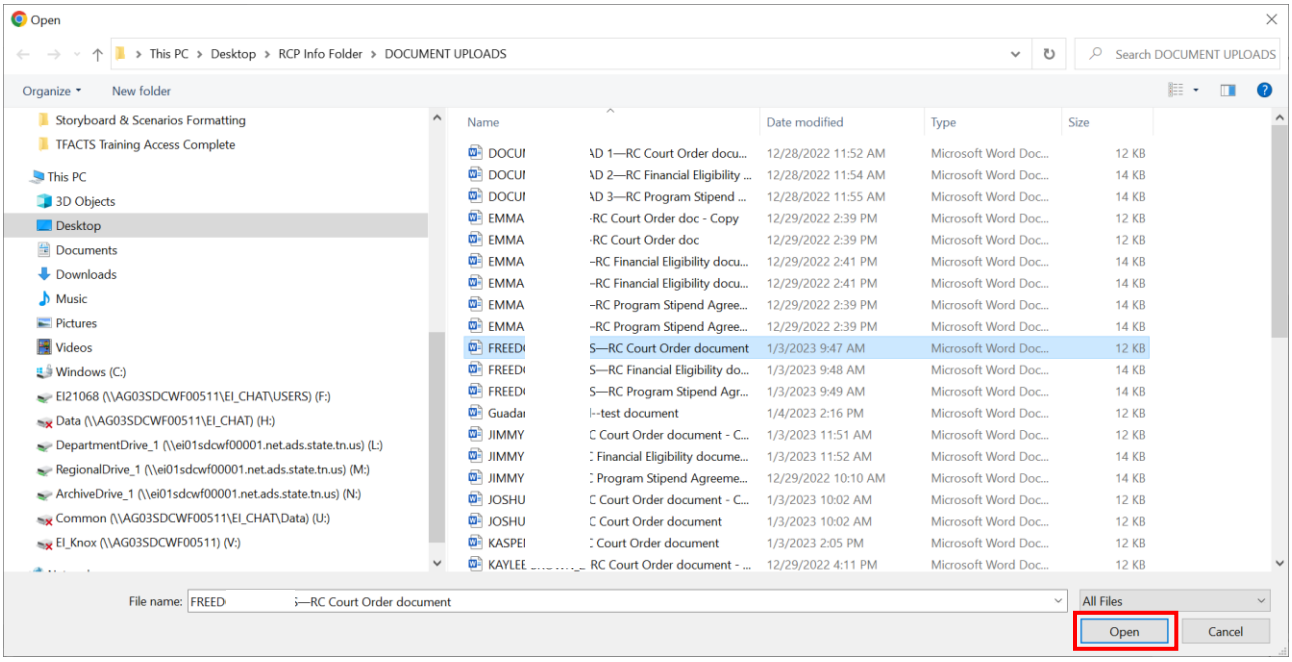
3. Click **Add Document**



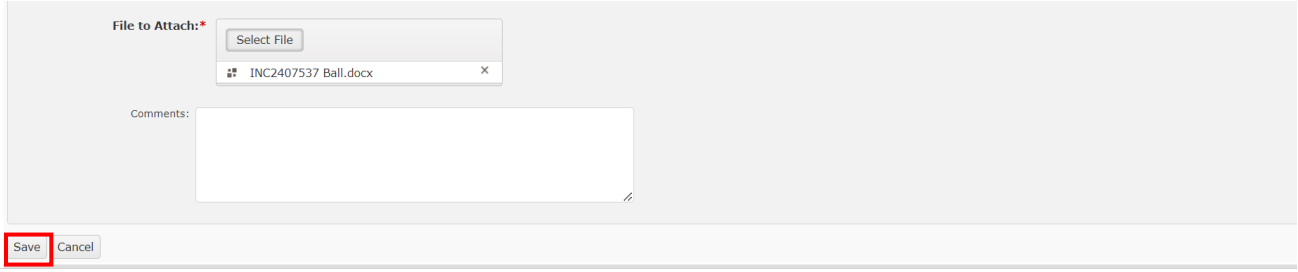
4. Choose **Contract** for **Document Category**
5. Choose **Relative Caregiver Program Stipend Agreement** for **Document Type**
6. Enter **Document Name**. For additional information on naming conventions, refer to Step 5 under Adding Relative Caregiver Court Order and Relative Caregiver Financial Eligibility section.
7. By the **File to Attach** click the **Select File** button.



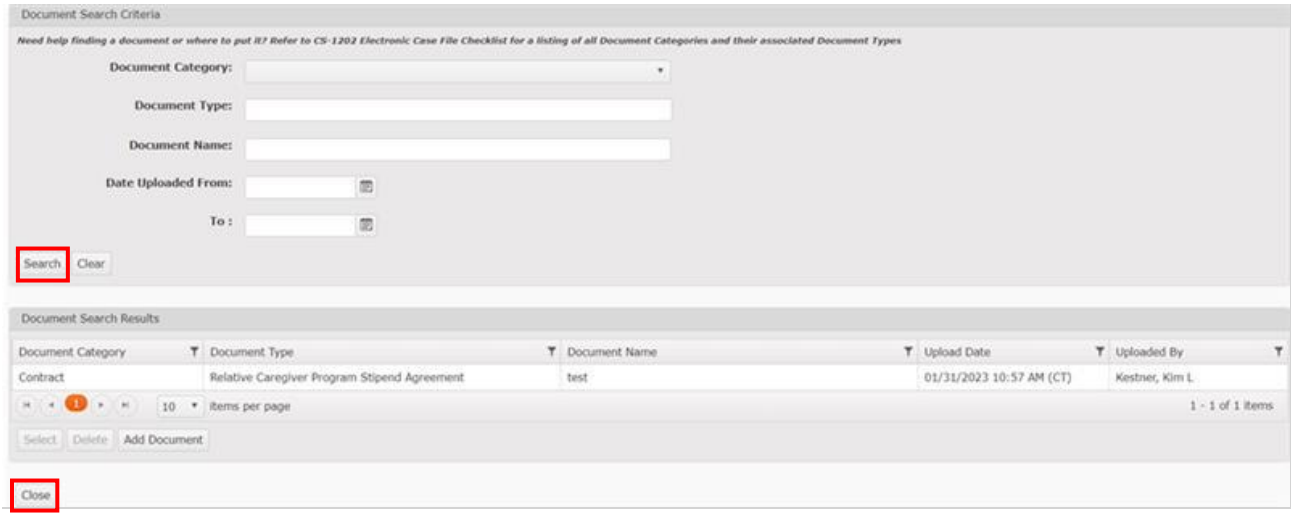
13. A pop up appears, search to locate and click on the **File to attach**; Click **Open**.



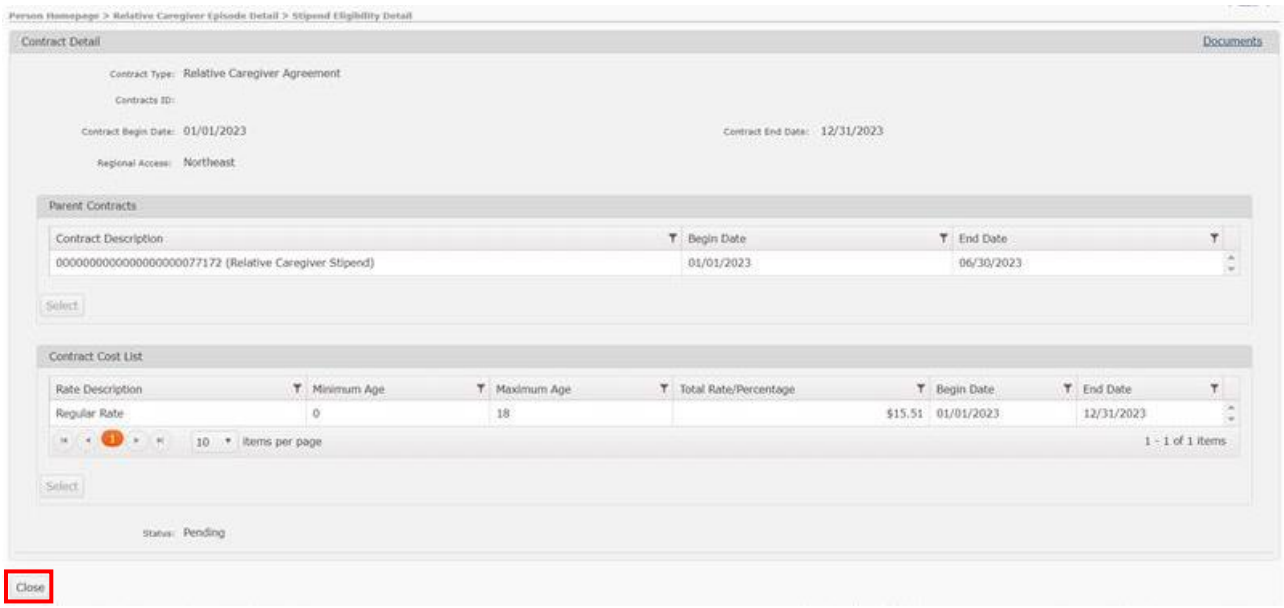
14. **Comments** (optional)
15. Click **Save**.



16. Click the **Search** button to view all uploaded documents.
17. Click **Close.** Will return to **Contract Detail** screen.



18. Click **Close.** Will return to **Stipend Eligibility Detail** Screen.



Step 6: Finalizing Relative Caregiver Episode

1. From **Stipend Eligibility Detail Screen**, change **Status** at the bottom of the screen from **Pending** to **Finalized**.
2. Click **Save.**

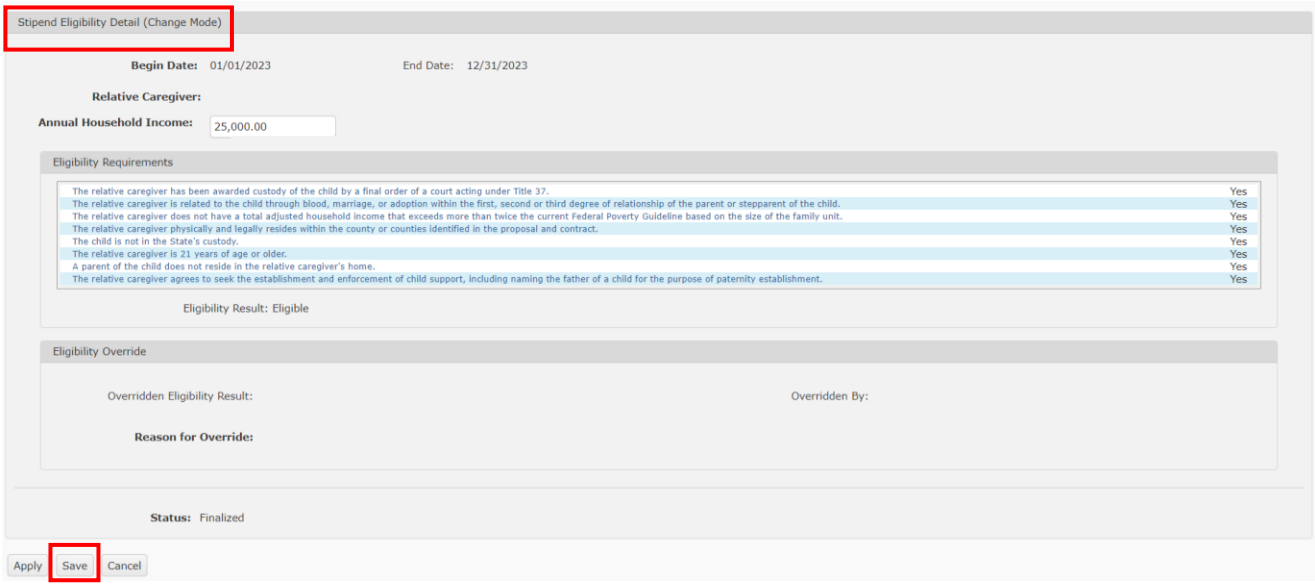
Step 7: Change Mode

1. From the **Stipend Eligibility Detail Screen**, click the **Change Mode** link.

2. Enter **Change Reason**, click **Save.**

NOTE: For the **Initial Eligibility** the **Annual Household Income** may be changed. If the Initial Eligibility Begin Date needs to be changed it will need to be changed in the **Relative Caregiver Episode Detail** page. For **Periodic Eligibility** the **Begin Date** and/or Annual Household Income may be changed.

3. Enter corrections on **Stipend Eligibility Detail (Change Mode) Screen**, click **Save**.



Step 8: Adding Members to Family Case

1. Go into the **Family Case**
2. From the **Case Overview Page** click **View Case Information**
3. Click **Members** tab
4. Click **Add Member**
5. **Perform** person search

   If the existing person is located during Person Search, enter the **Person ID** and click **Search**. **OR**

   If a person match <u>was not</u> located, enter the appropriate search criteria, and click **Search**.

   If no match is returned for the person you are searching, click **Add Person.**

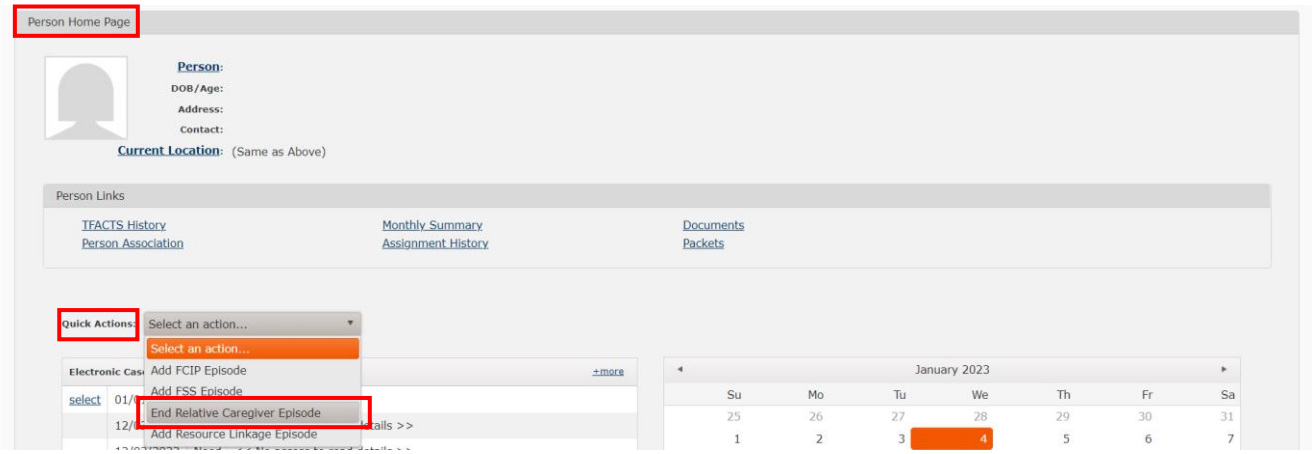
   a. Enter **Name Type**, enter **First Name, Last Name, DOB, SSN, Gender, Race**, and any other information pertinent to this person.

   b. Click **Save.**

   If a match is returned for the person you are searching, click the **<u>choose</u>** hyperlink**.**
6. Click **Apply** *(not Save)* after adding each member
7. Click **Save** once **all** members have been added to be returned to the **Case Overview Screen**

Step 9: Ending Relative Caregiver Episode

1. From the **Person Home Page, Quick Actions** choose **'End Relative Caregiver Episode'** from dropdown.



2. Enter **End Date** and click **Save**.

You have completed this storyboard.