

STAAND Technical User Guide for Eligibility & Subsidy



Version 2.0 - 2.6 Enhancements
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Table of Contents



Table of Contents

Record Creation	4
How To: Create a Separation Record to Generate an Eligibility Record	4
How To: Approve the Separation Record	10
How To: Change the Legal Status of a Child	13
How To: Use the Rules of Summaries to Determine Eligibility Status	15
How to: Look Up People in Pending Eligibility Records	20
How To: Determine IV-E Foster Care Eligibility	21
Eligibility Record Creation	23
How To: Create an Adoption Eligibility Record	23
How To: Use the Rules of Summaries to Determine Eligibility status.....	26
Eligibility Adoption Pre-Determination Checks	29
How To: Determine IV-E Adoption Eligibility	31
Eligibility Record Creation	32
How To: Create a Guardianship Eligibility Record	32
How To: Use the Rules of Summaries to Determine Eligibility status.....	35
How To: Determine IV-E Guardianship Eligibility	38
Subsidy Adoption	41
How To: Manage a Subsidy Adoption Case.....	41
Subsidy Guardianship	54
How To: Manage a Subsidy Guardianship Case	54
Provider Annual Review Process	60

Foster Care Eligibility



Record Creation



Note:

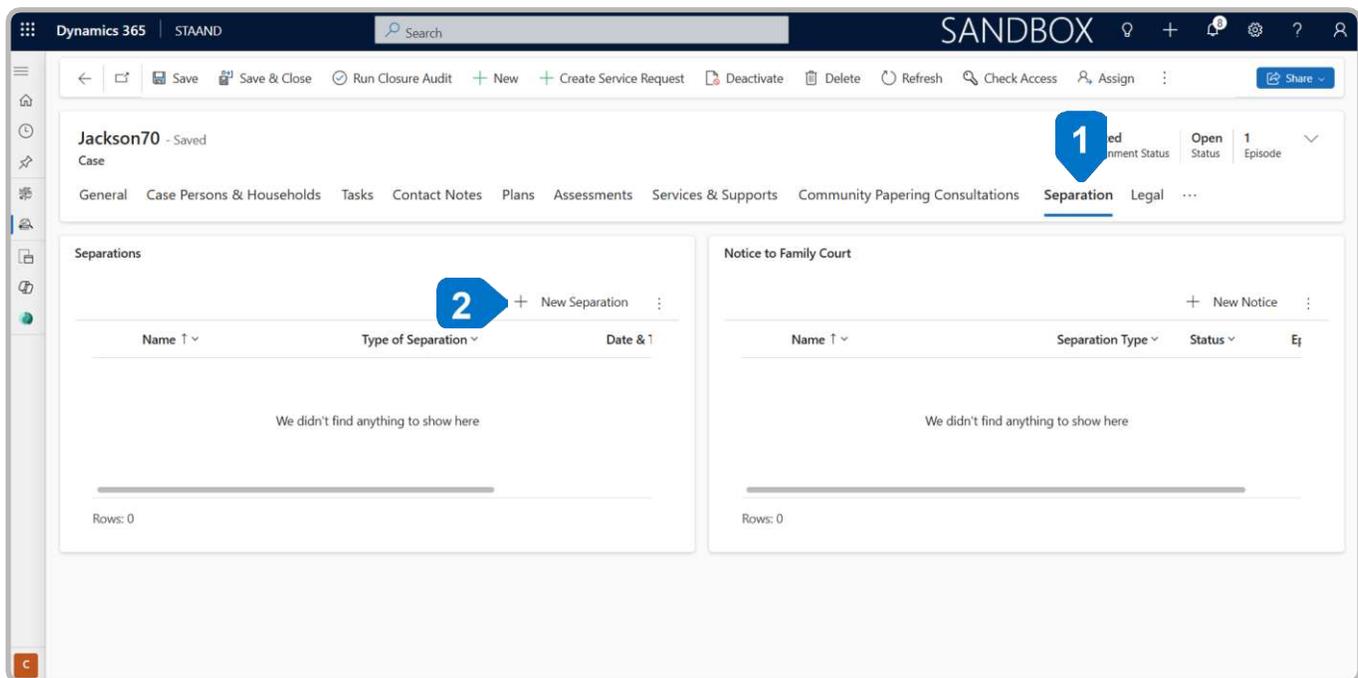
A foster care eligibility record is automatically generated when:

- A separation detail is approved in the Child's case record.
- A legal status is assigned, indicating the Child is in CFSA custody.

Eligibility records are automatically created based on specific case events. The process differs for Foster Care Eligibility and Adoption/Guardianship Eligibility, depending on how the Child's case progresses.

How To: Create a Separation Record to Generate an Eligibility Record

1. From the Case Record, select the Separation tab. If not visible, select the More Commands option.
2. From the Separations sub-grid, select + New Separation.



3. Complete the Date & Time of Separation.
4. Select the Type of Separation from the dropdown menu.
5. Complete the remaining fields as needed.
6. Select Save.

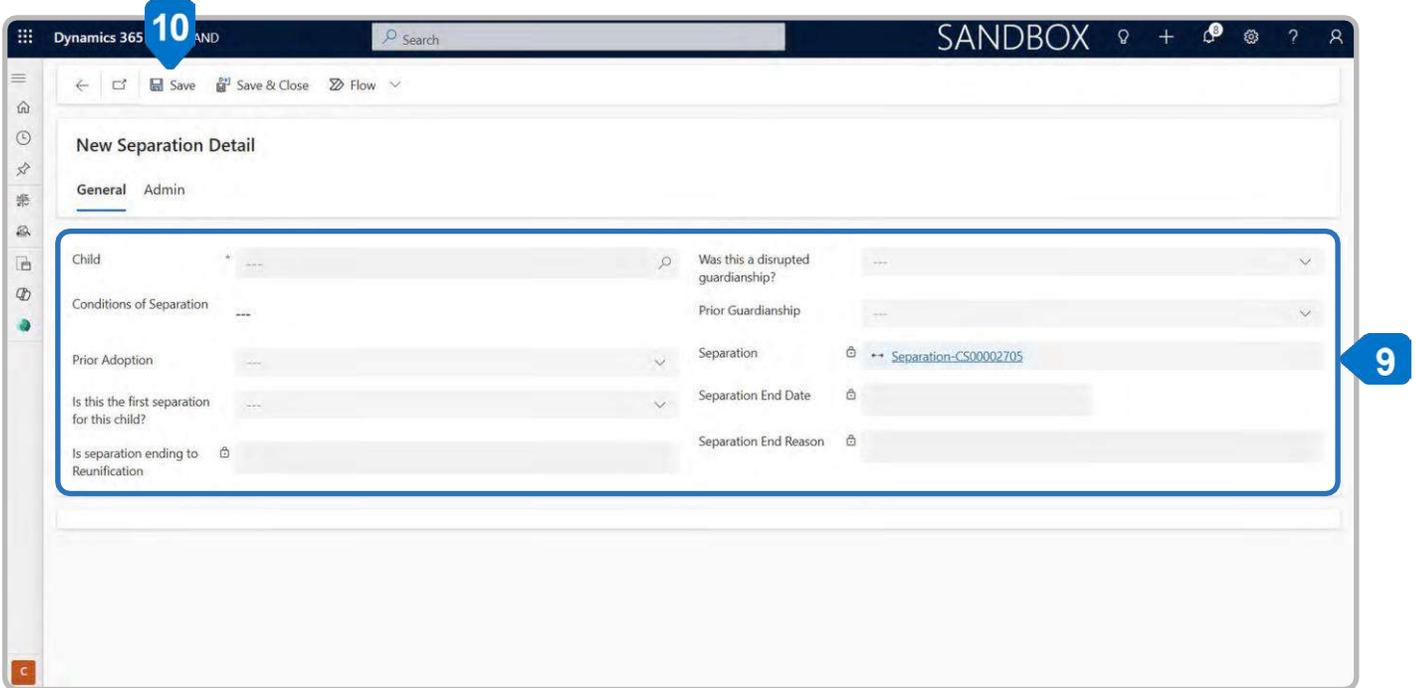
The screenshot shows the 'New Separation' form in Dynamics 365. The form is titled 'New Separation - Unsaved' and is in 'Draft' status. The 'General' tab is active. Callout 3 points to the 'Date & Time of Separation' field. Callout 4 points to the 'Type of Separation' dropdown menu. Callout 5 points to the 'Efforts to Engage Kin' text area. Other fields include 'Caregiver Living Structure', 'Environment of Separation', 'Category of Separation', and several yes/no questions.

7. Navigate to the Separation Details sub-grid.
8. Select + New Separation Detail.

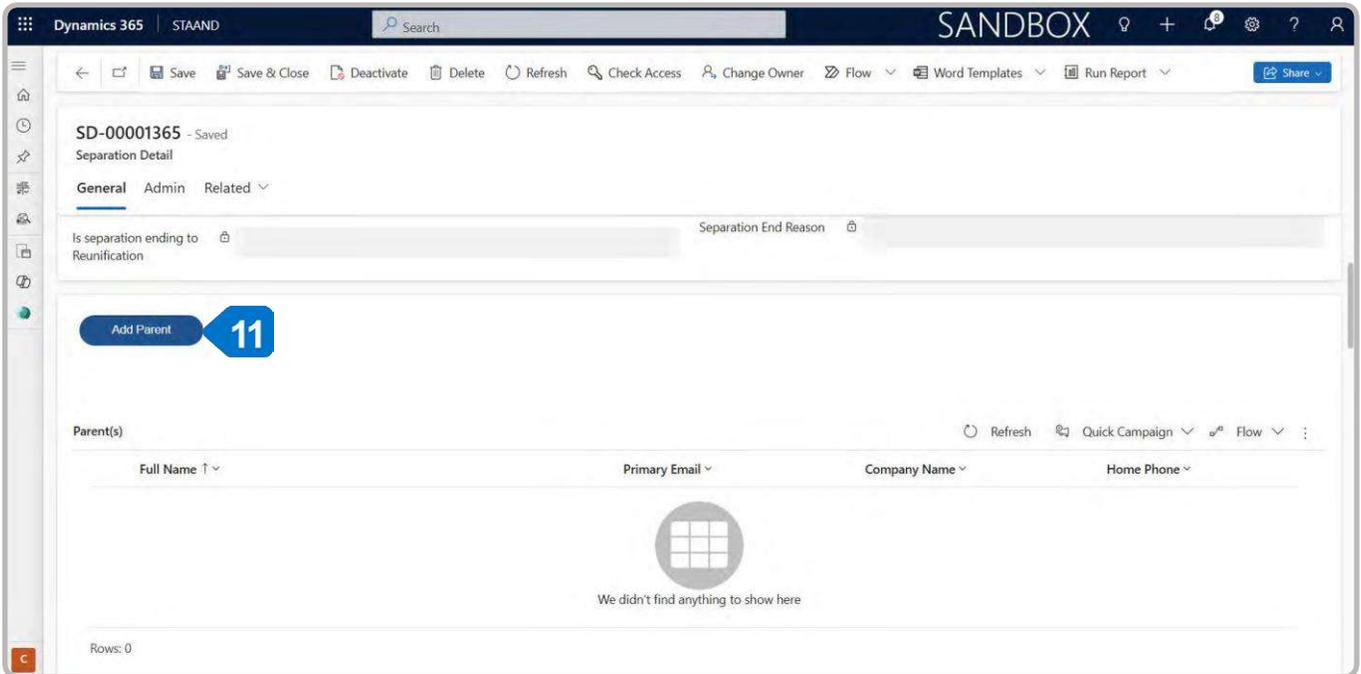
The screenshot shows the 'Separation-Details' sub-grid in Dynamics 365. The main form is titled 'Separation-CS00002705 - Unsaved'. The sub-grid is currently empty, displaying a message: 'We didn't find anything to show here'. Callout 8 points to the '+ New Separation Detail' button. Callout 7 points to the sub-grid area. The sub-grid has columns for 'Child', 'Created On', and 'Separation End Date'.

9. Complete the fields for the New Separation Detail record.

10. Select Save.

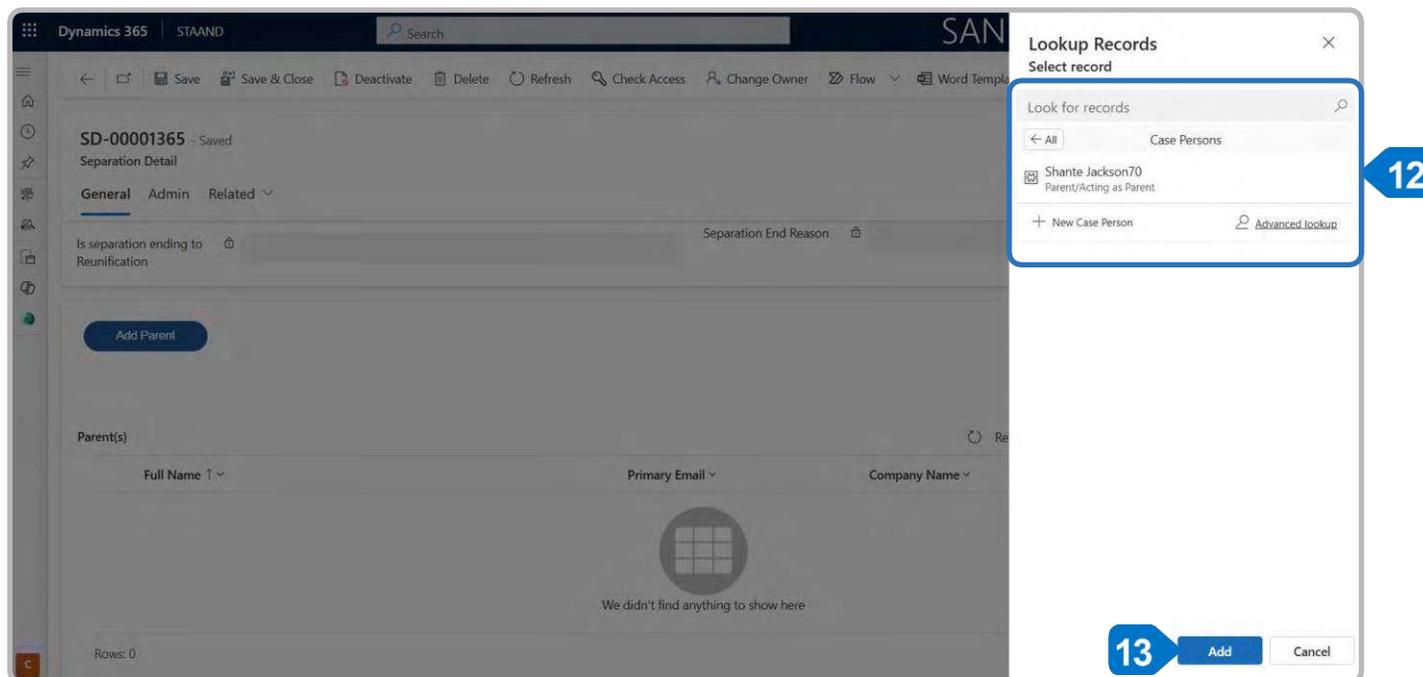


11. Select Add Parent.



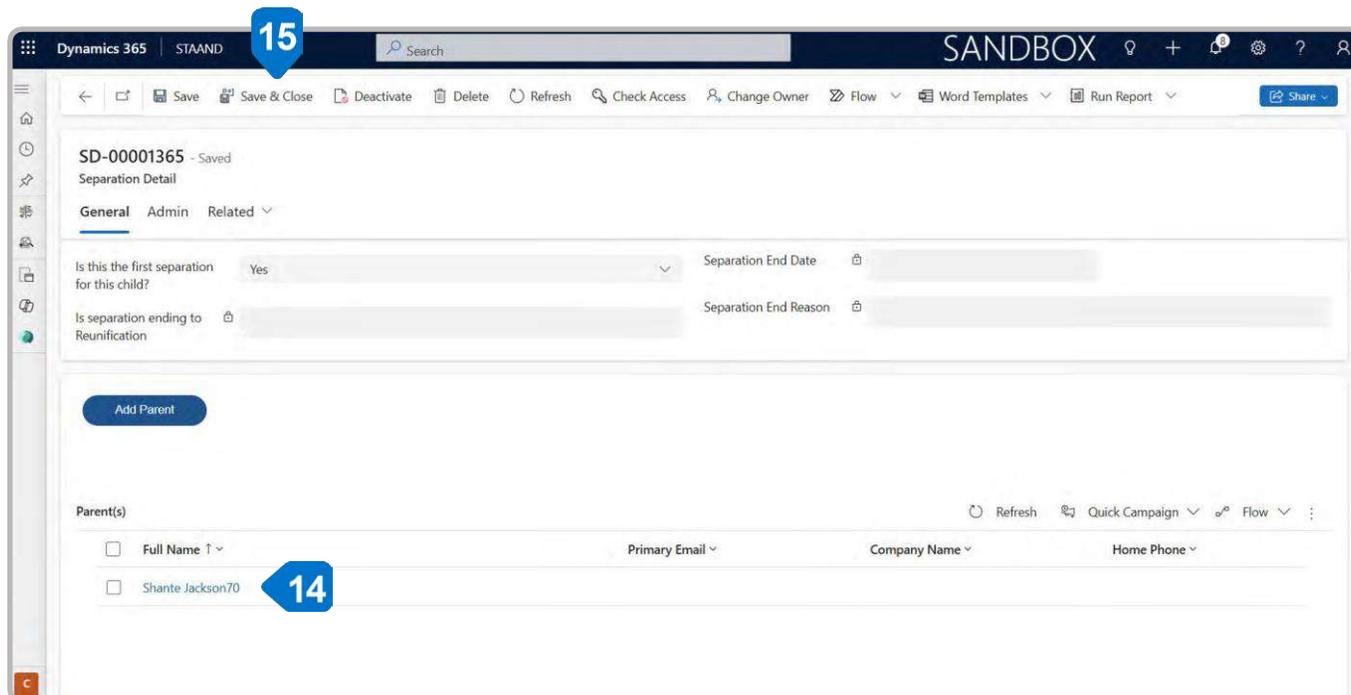
12. In the Lookup Records window, select the parent.

13. Select Add.

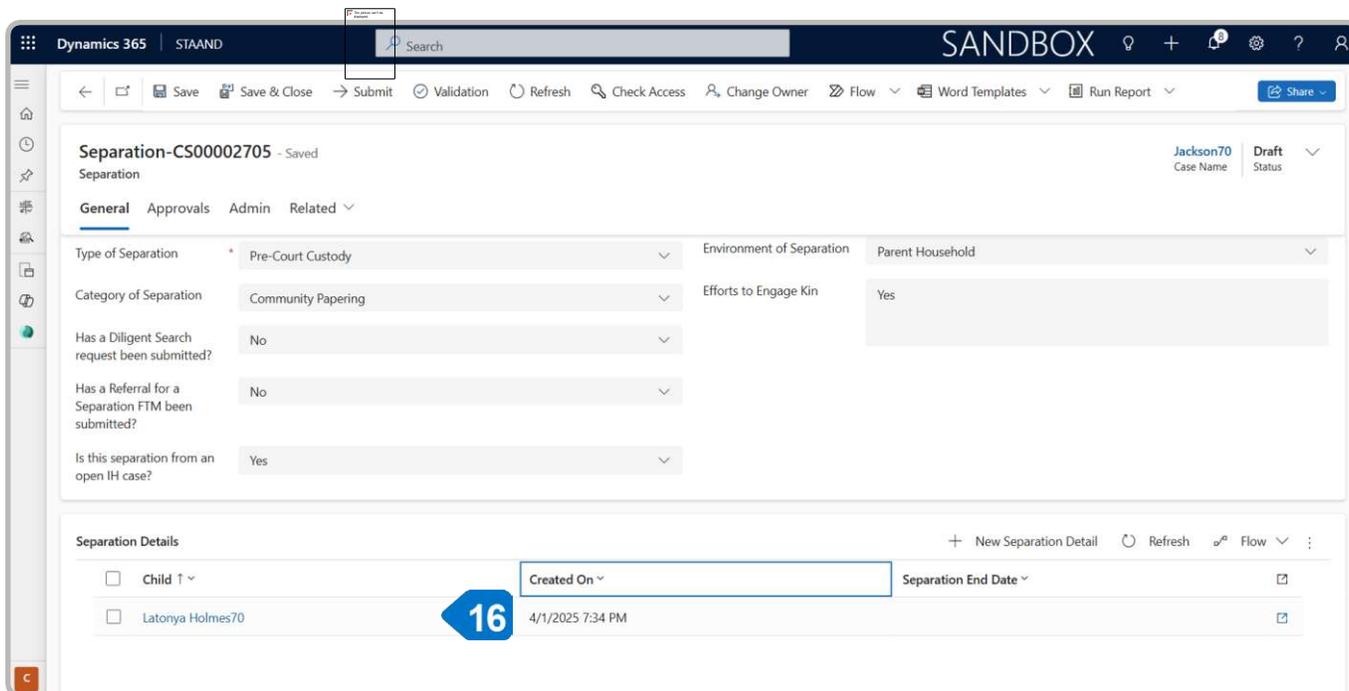


14. The parent will populate in the Parent(s) sub-grid.

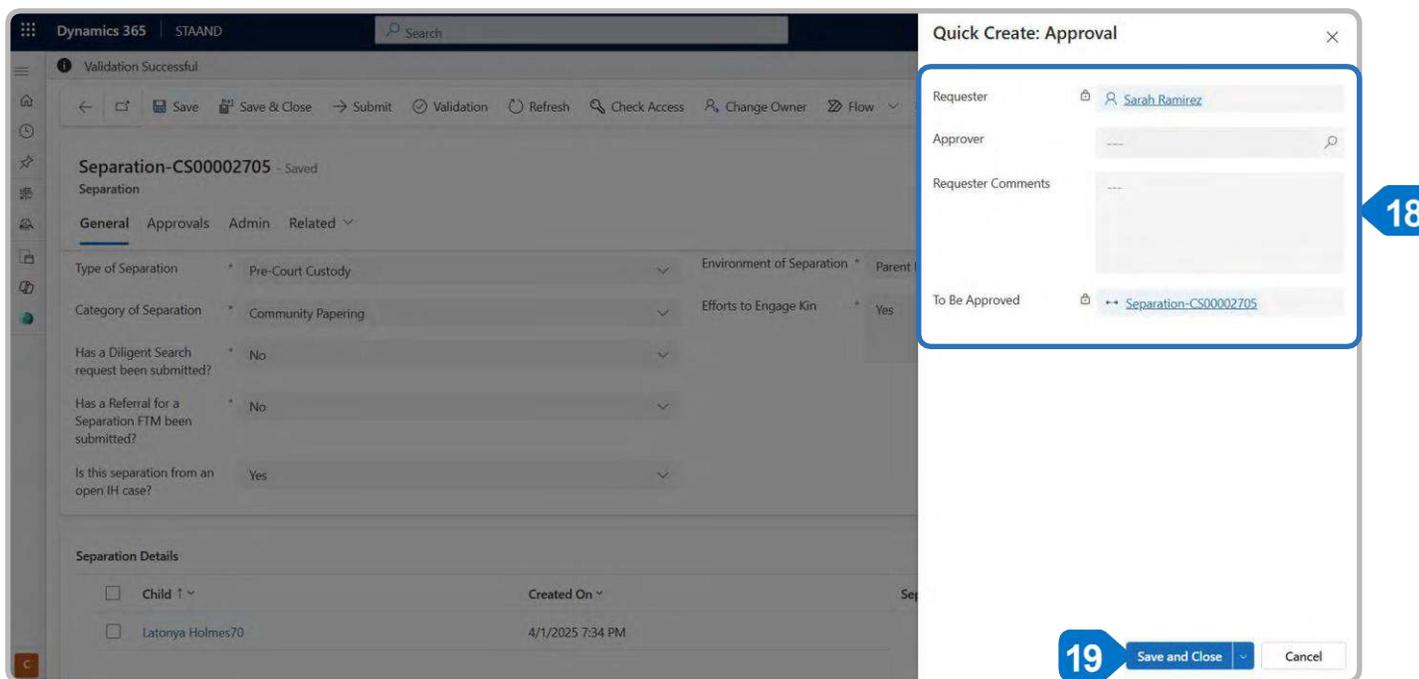
15. Select Save & Close.



16. The new Separation Detail will populate in the sub-grid.
17. Select Submit from the Action toolbar.



18. Select the Approver in the Quick Create: Approval window.
19. Select Save and Close.



20. The status of the Separation is now Pending Approval:

The screenshot displays the Dynamics 365 interface for a Separation record. The record ID is CS00002705 and is saved. The status is 'Pending Approval', which is highlighted with a blue callout box containing the number '20'. The record is associated with Case Name 'Jackson70'. The 'General' tab is active, showing fields for Type of Separation (Pre-Court Custody), Environment of Separation (Parent Household), Category of Separation (Community Papering), Efforts to Engage Kin (Yes), Has a Diligent Search request been submitted? (No), Has a Referral for a Separation FTM been submitted? (No), and Is this separation from an open IH case? (Yes). Below the form is a 'Separation Details' table with columns for Child, Created On, and Separation End Date. The table contains one row for 'Latonya Holmes70' created on 4/1/2025 at 7:34 PM.

Child	Created On	Separation End Date
Latonya Holmes70	4/1/2025 7:34 PM	

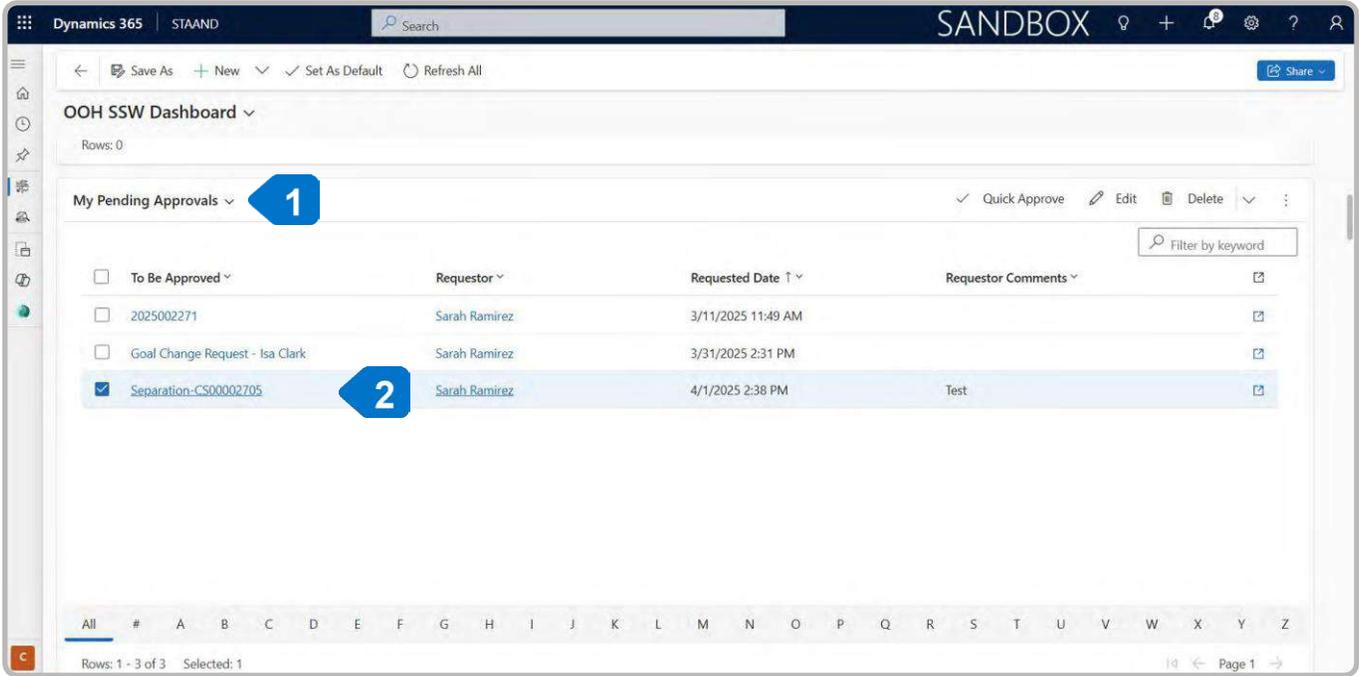
Note:

In the Criteria tab of Eligibility, the visibility of the “18+ Foster Care Eligibility Criteria” section depends on the Age at Record Start field:

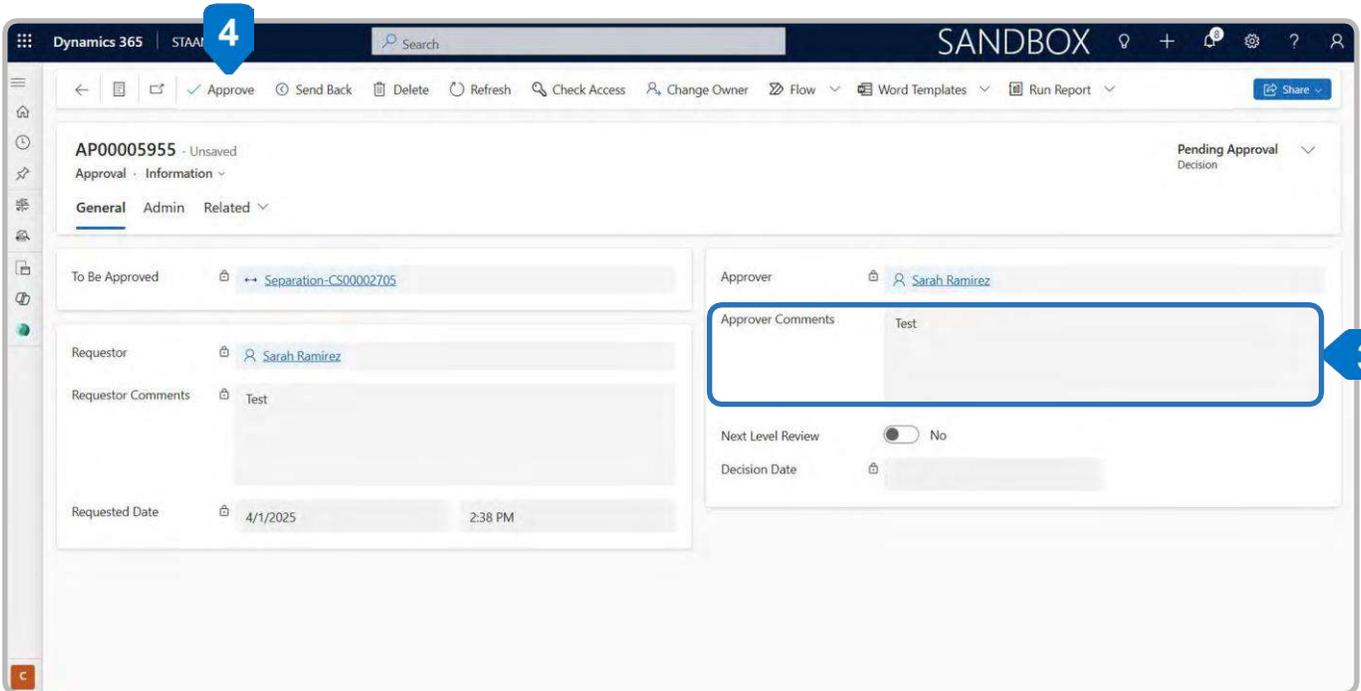
If Age at Record Start ≥ 18 and < 21 years, the “18+ Foster Care Eligibility Criteria” section will be visible.

How To: Approve the Separation Record

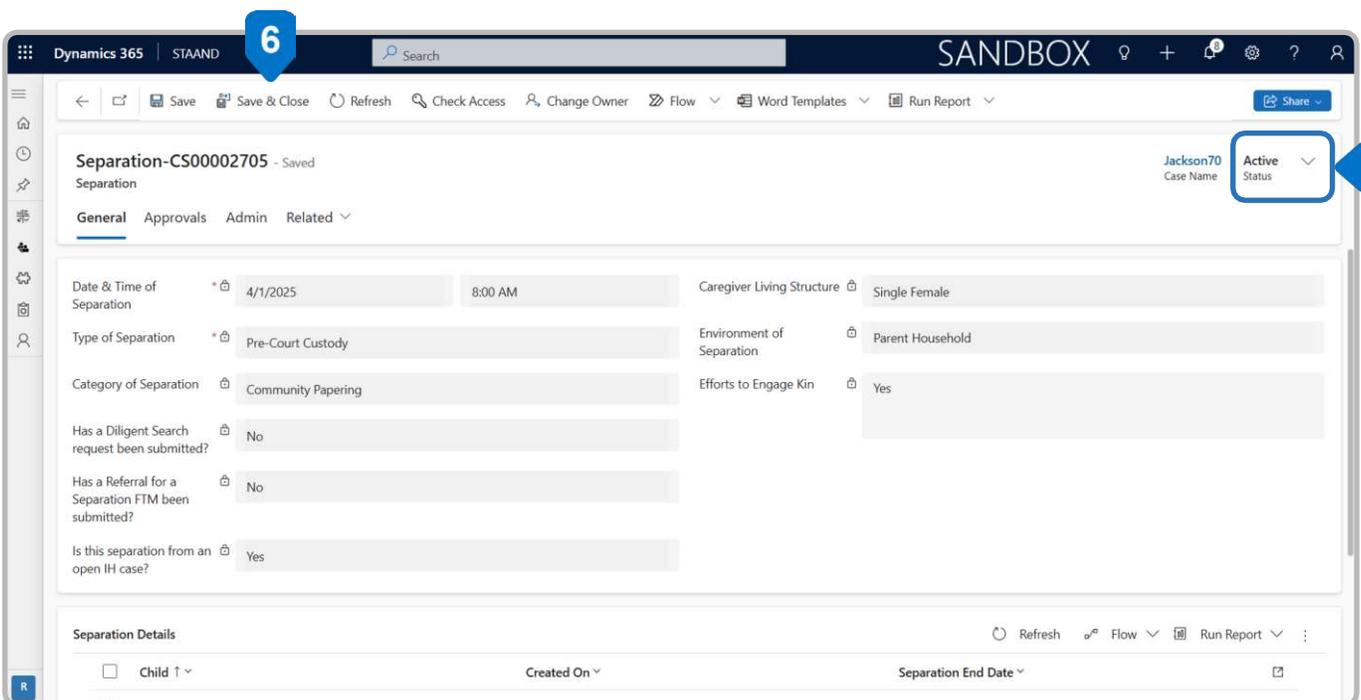
1. From the Out of Home (OOH) SSW Dashboard, navigate to My Pending approvals.
2. Select and open the record to approve from the To Be Approved List.



3. On the Approval Record, enter Approver Comments.
4. Select Approve from the Action Toolbar.



5. Navigate back to the Separation Record. The status is now Active.
6. Select Save & Close to close the Separation record.



7. The new Separation Record will populate in the Separations sub-grid.

The screenshot shows the Dynamics 365 interface for a case named 'Jackson70'. The 'Separation' sub-grid is active, displaying a table with one record:

Name	Type of Separation	Date & Time
Separation-CS00002705	Pre-Court Custody	4/1/2025

A blue callout box with the number '7' is positioned over the 'Pre-Court Custody' text in the table. The 'Notice to Family Court' sub-grid is empty, showing the message 'We didn't find anything to show here'.

Note:

The User can also approve from the Dashboard by using the Quick Approve feature.

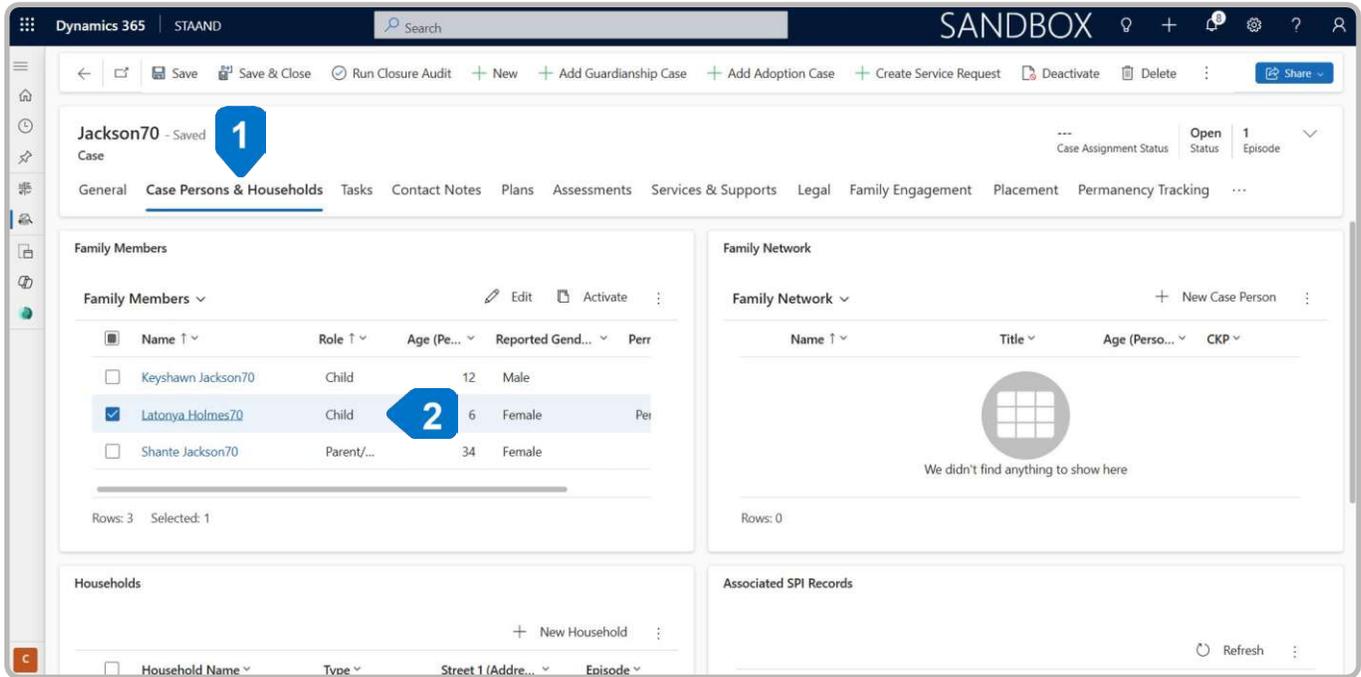
The screenshot shows the 'OOH SSW Dashboard' in Dynamics 365. The 'My Pending Approvals' section contains a table with the following data:

To Be Approved	Requestor	Requested Date	Requestor Comments
<input type="checkbox"/>	2025002271	Sarah Ramirez	3/11/2025 11:49 AM
<input type="checkbox"/>	Goal Change Request - Isa Clark	Sarah Ramirez	3/31/2025 2:31 PM
<input checked="" type="checkbox"/>	Separation-CS00002705	Sarah Ramirez	4/1/2025 2:38 PM

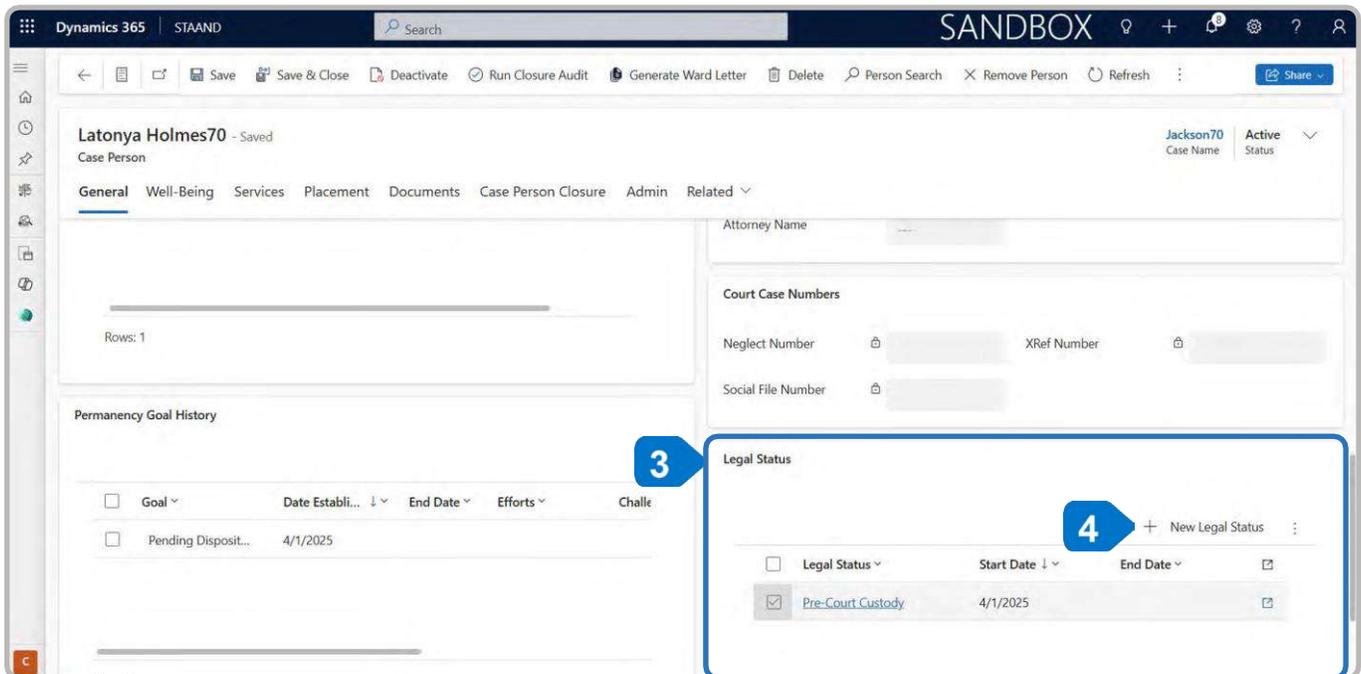
The 'Quick Approve' button in the top right corner of the table is highlighted with a green box. The 'Separation-CS00002705' row is selected.

How To: Change the Legal Status of a Child

1. From the Case Record, select the Case Persons & Households tab.
2. Select the Child from the Family Members sub-grid to open the Case Person record.



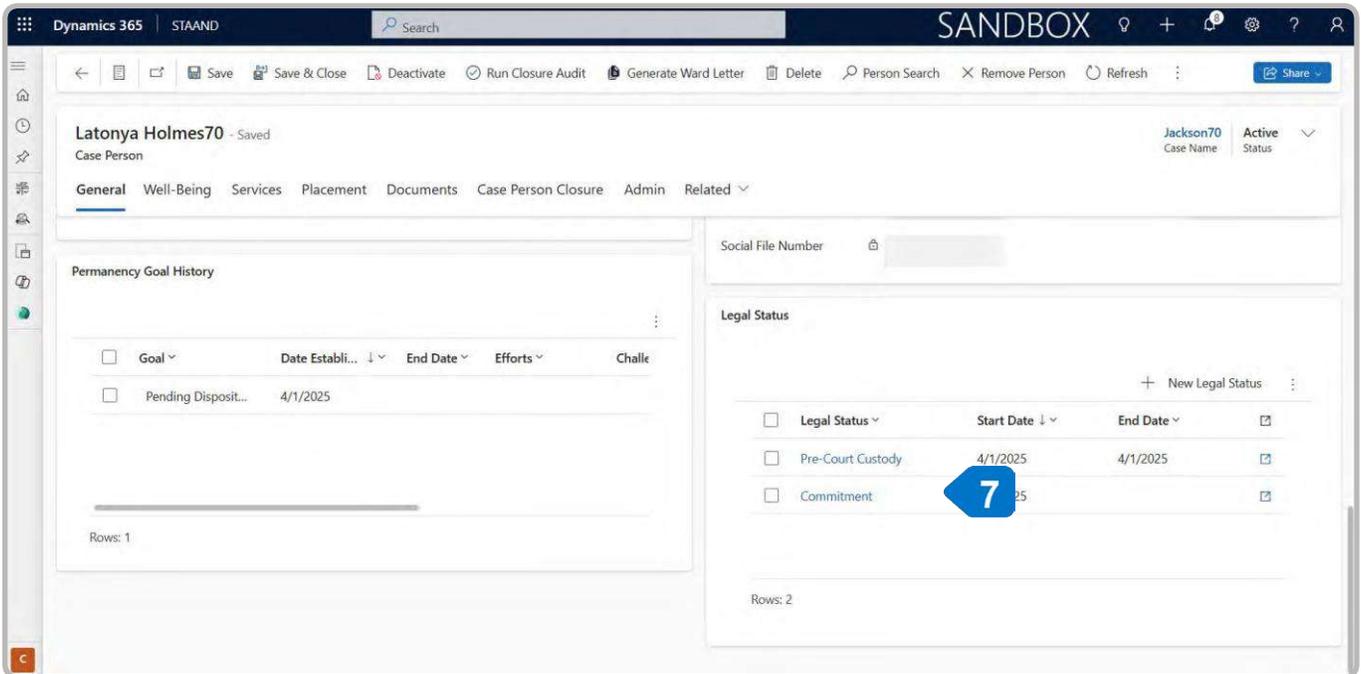
3. From the Child's Case Person record, navigate to the Legal Status sub-grid.
4. Select +New Legal Status.



5. Complete the New Legal Status.
6. Select Save & Close.



7. The new Legal Status will populate in the Legal Status sub-grid.



How To: Use the Rules of Summaries to Determine Eligibility Status

Note:

The Eligibility record will automatically be created based on the Separation and the change of the Legal status for the Child.

1. From the Case record, select the Eligibilities tab. If not visible, select the More Commands option.

The screenshot shows the Dynamics 365 interface for a case named 'Jackson70'. The 'Case Persons & Households' tab is active. A 'More Commands' menu is open, showing options like Documents, Separation, and Eligibilities. A blue circle with the number '1' highlights the 'Eligibilities' option.

Name	Role	Age (Pe...)	Reported Gend...	Perr
Keyshawn Jackson70	Child	12	Male	
Latonya Holmes70	Child	6	Female	Per
Shante Jackson70	Parent/...	34	Female	

2. Select and open the Eligibility record.

The screenshot shows the Dynamics 365 interface for the same case, now with the 'Eligibilities' tab selected. An eligibility record is visible in the 'Eligibility Associated View' table. A blue circle with the number '2' highlights the first row of the table.

Eligibility Name	Eligibility Type	Effective Start Date	Effective End Date	Status	Home Removal Date	Referral	Case ID
ELIG-002020 - Initial D...	Title IV-E Foster Care	4/1/2025	4/1/2026	Pending	4/1/2025		Jackson70

3. The User can now see the Foster Care Eligibility Type, and that the Eligibility Status is Pending.

The screenshot displays the Dynamics 365 interface for an Eligibility record. The record title is "ELIG-002020 - Initial Determination - Saved". The Eligibility Type is "Title IV-E Foster Care" and the Eligibility Status is "Pending". The Effective Start Date is 4/1/2025 and the Effective End Date is 4/1/2026. The record is categorized under "Child Information", "Relationships to Child", "Case Information", and "Provider Information".

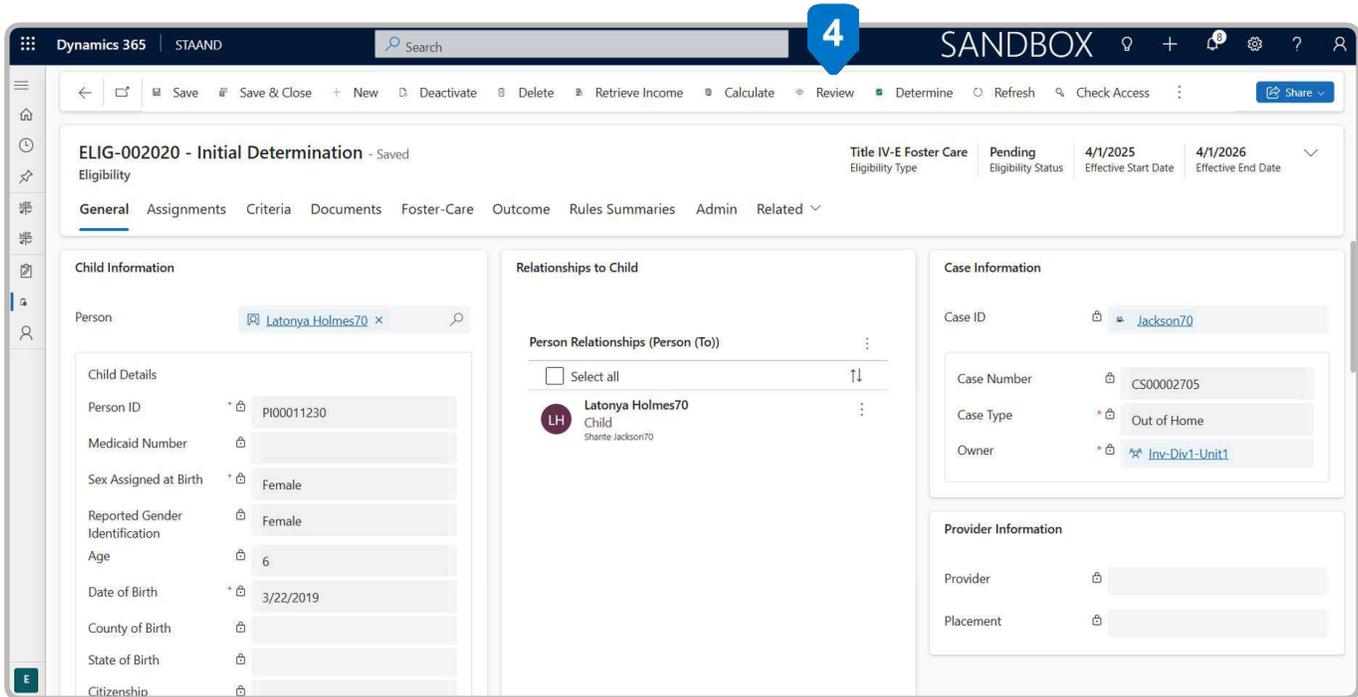
Field	Value
Person ID	PI00011230
Medicaid Number	
Sex Assigned at Birth	Female
Reported Gender Identification	Female
Age	6
Date of Birth	3/22/2019
County of Birth	
State of Birth	
Citizenship	
Case ID	Jackson70
Case Number	CS00002705
Case Type	Out of Home
Owner	Inv-Div1-Unit1

Note:

In the Criteria tab of Eligibility, the visibility of the “18+ Foster Care Eligibility Criteria” section depends on the Age at Record Start field:

If Age at Record Start ≥ 18 and < 21 years, the “18+ Foster Care Eligibility Criteria” section will be visible.

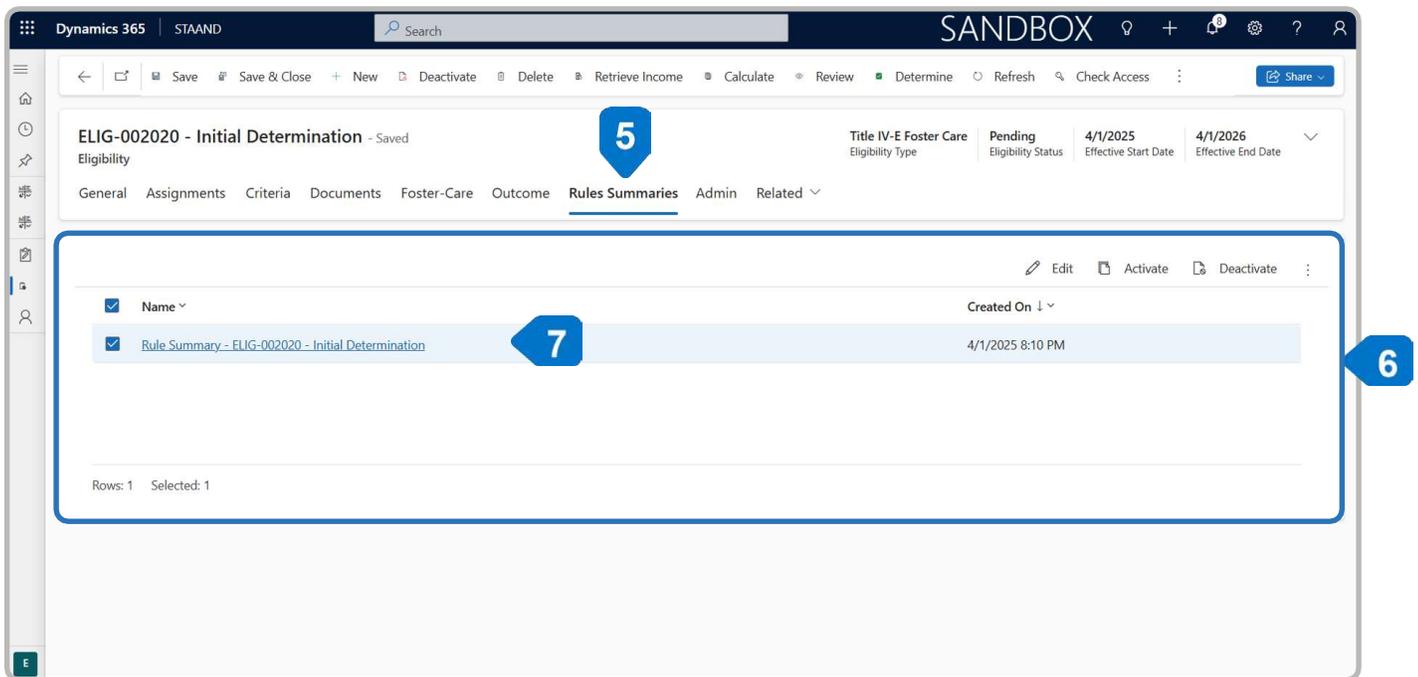
4. Select Review from the Action Toolbar.



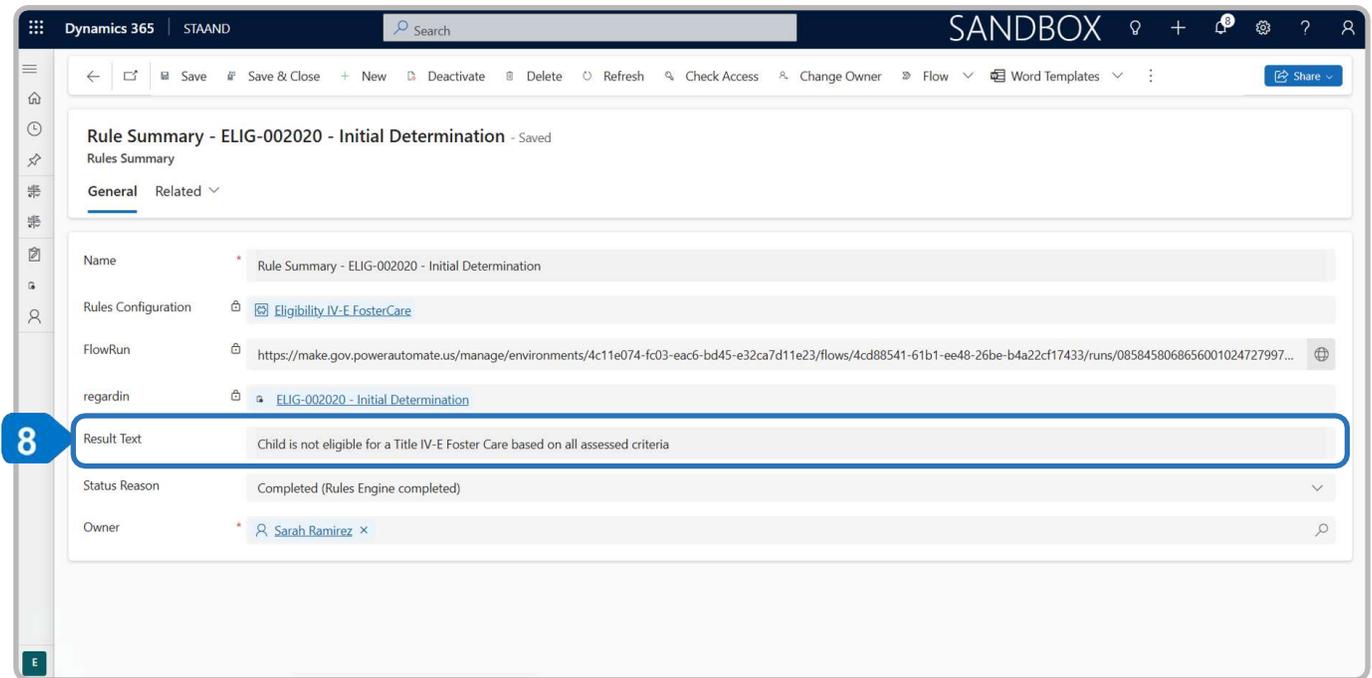
5. Select the Rules of Summaries tab once the Rules of Summaries has been completed.

6. The Rule Summary will populate in the sub-grid.

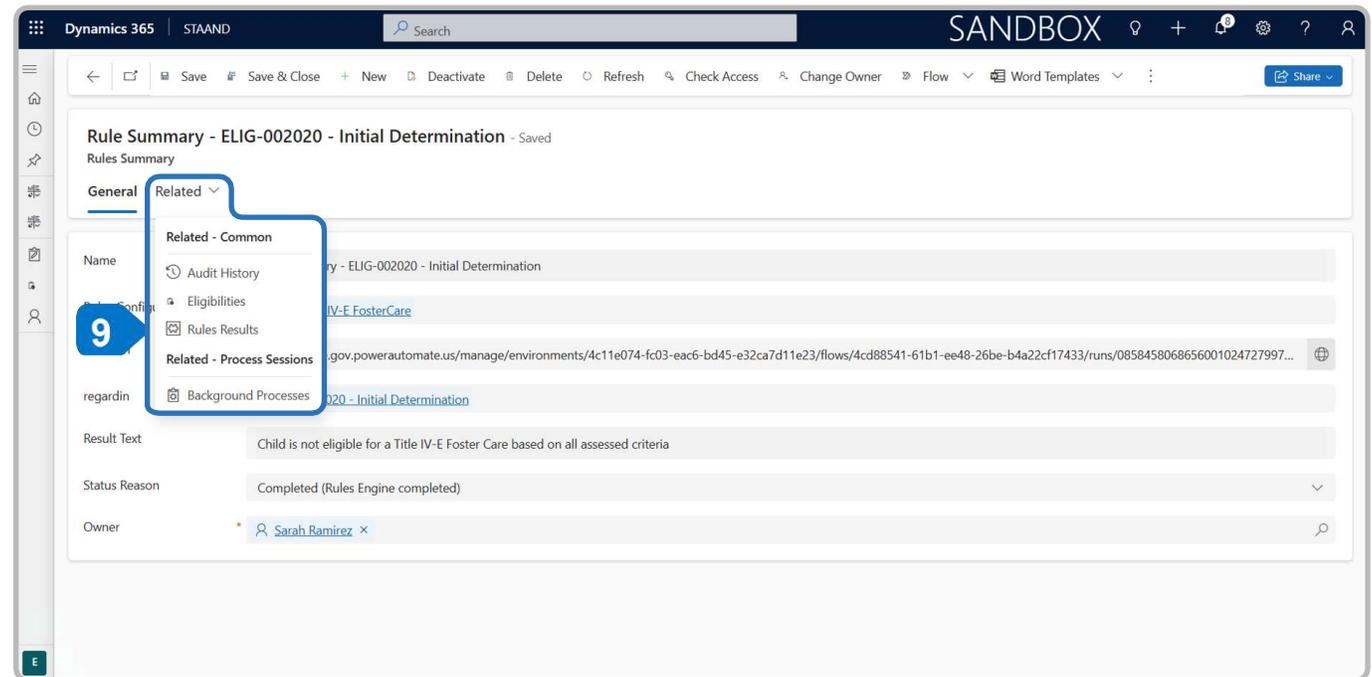
7. Select and open the Rules Summary record.



8. On the Rule Summary record, the User will see the Result Text field.



9. Select the Rules Results from the Related dropdown menu to view the eligibility of the Child.



10. The Rules Results will show where the record passed and failed. Any failed areas will need to be addressed, to make the Child eligible.

The screenshot shows the Dynamics 365 interface for a 'Rule Summary - ELIG-002020 - Initial Determination'. The 'Rules Results Associated View' table is highlighted with a blue box and a callout '10'. The table contains the following data:

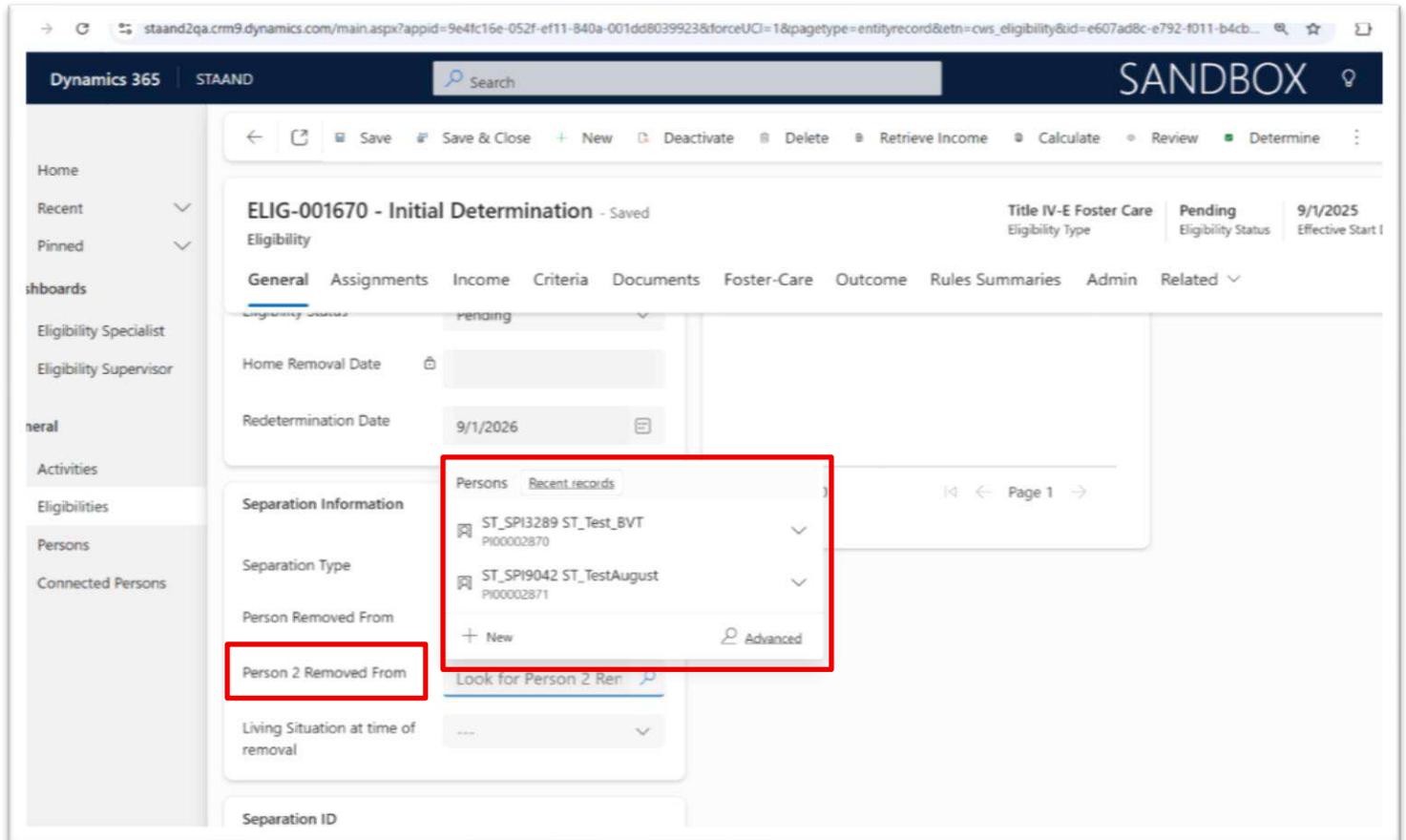
Name	Parent Rule	Rule Status	Rules Output	Result Text	Error Text
Rule Result for FosterCare_AgeValidation	Rule Summary - ...	Pass	("Rule Name":"Rule Result for FosterCare...	Child is under 18 years old and eligible.	
Rule Result for FosterCare_CitizenValidat...	Rule Summary - ...	Fail	("Rule Name":"Rule Result for FosterCare...	Child is an Ineligible Non-Citizen and is not eligi...	
Rule Result for FosterCare_ConstructiveR...	Rule Summary - ...	Not Applicable	("Rule Name":"Rule Result for FosterCare...	Not Applicable	
Rule Result for FosterCare_CourtOrder_5...	Rule Summary - ...	Fail	("Rule Name":"Rule Result for FosterCare...	Failure: Court order not within 5 working days o...	
Rule Result for FosterCare_CourtOrder_6...	Rule Summary - ...	Fail	("Rule Name":"Rule Result for FosterCare...	Ineligible: Court order not within 60 working da...	
Rule Result for FosterCare_CourtOrder_...	Rule Summary - ...	Fail	("Rule Name":"Rule Result for FosterCare...	Ineligible: No court order authorizing removal f...	
Rule Result for FosterCare_DerivationF...	Rule Summary - ...	Fail	("Rule Name":"Rule Result for FosterCare...	No derivation factors met	

Important Tip:

The Rules of Summary can be reviewed at any time. Additionally, the User can revisit the Rules of Summary process multiple times after items are addressed to check for any additional failed rules.

How to: Look Up People in Pending Eligibility Records

When a pending Eligibility record is opened, it may be linked to either a Referral or a Case. If you click to look up a Person under “Person Removed From” or “Person 2 Removed From,” the system should only show people who are connected to that Referral or Case.



The screenshot displays the Dynamics 365 interface for an Eligibility record. The record title is "ELIG-001670 - Initial Determination" and it is in a "Pending" status. The "Person 2 Removed From" field is highlighted with a red box. A dropdown menu is open, showing a list of persons with IDs and names, also highlighted with a red box. The dropdown includes options for "New" and "Advanced".

If there is only a Referral, the list of people comes from that Referral.

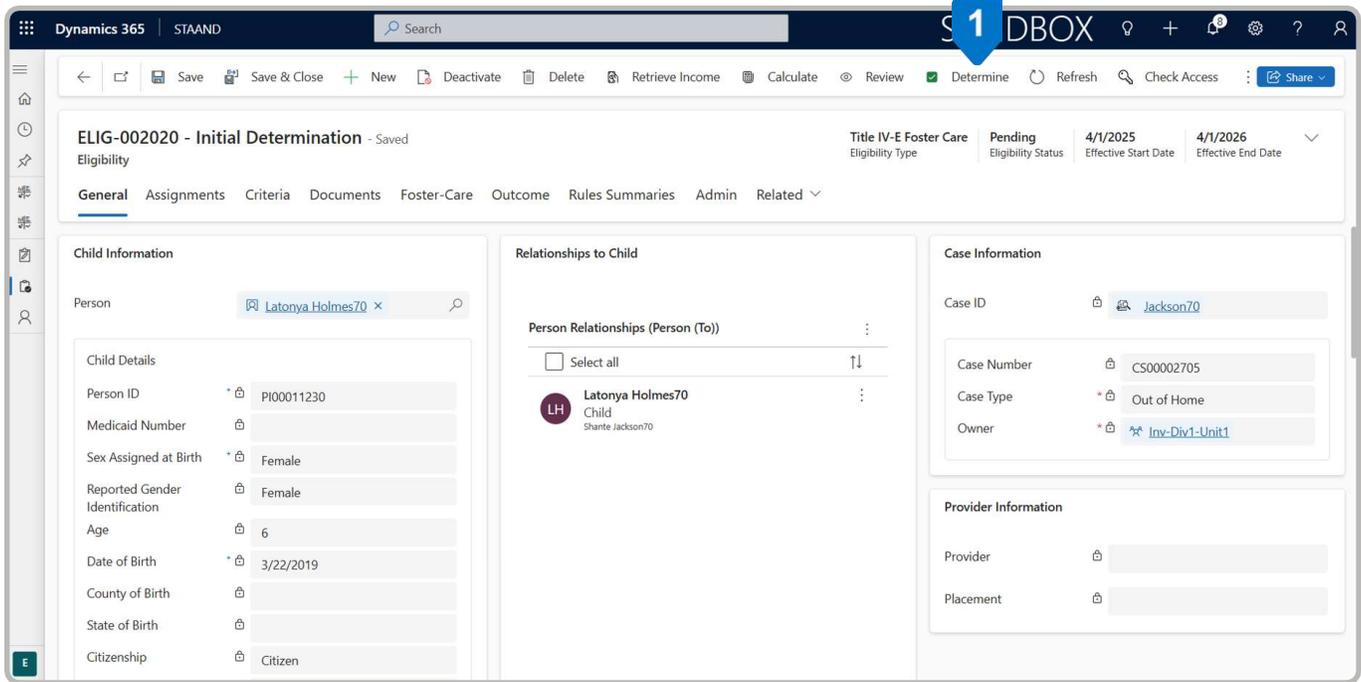
If there is a Case, the list comes from the Case—even if there is also a Referral.

(The Case takes priority.)

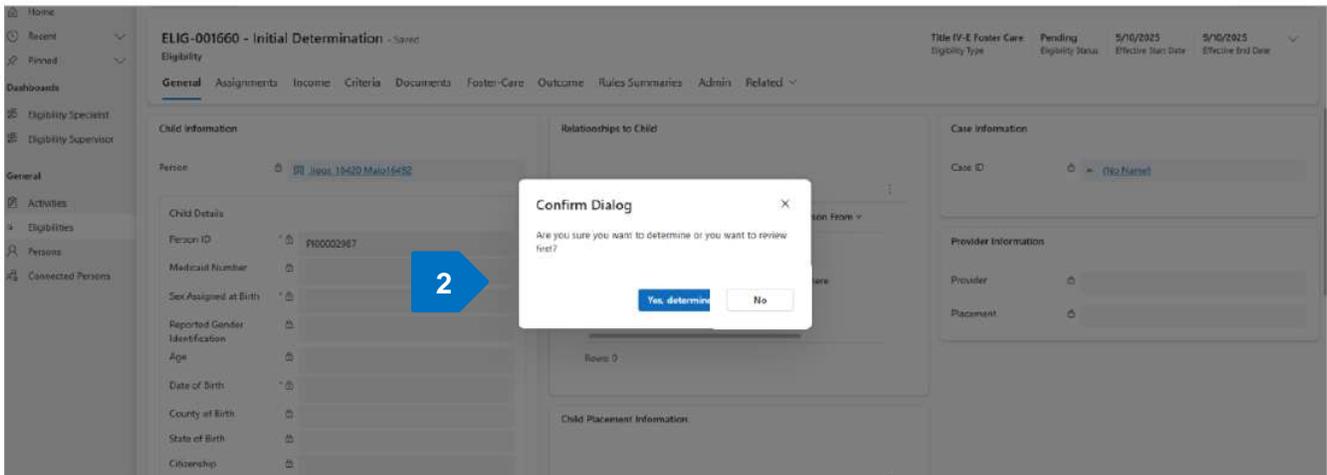
This helps make sure you're only choosing people who are part of the right situation.

How To: Determine IV-E Foster Care Eligibility

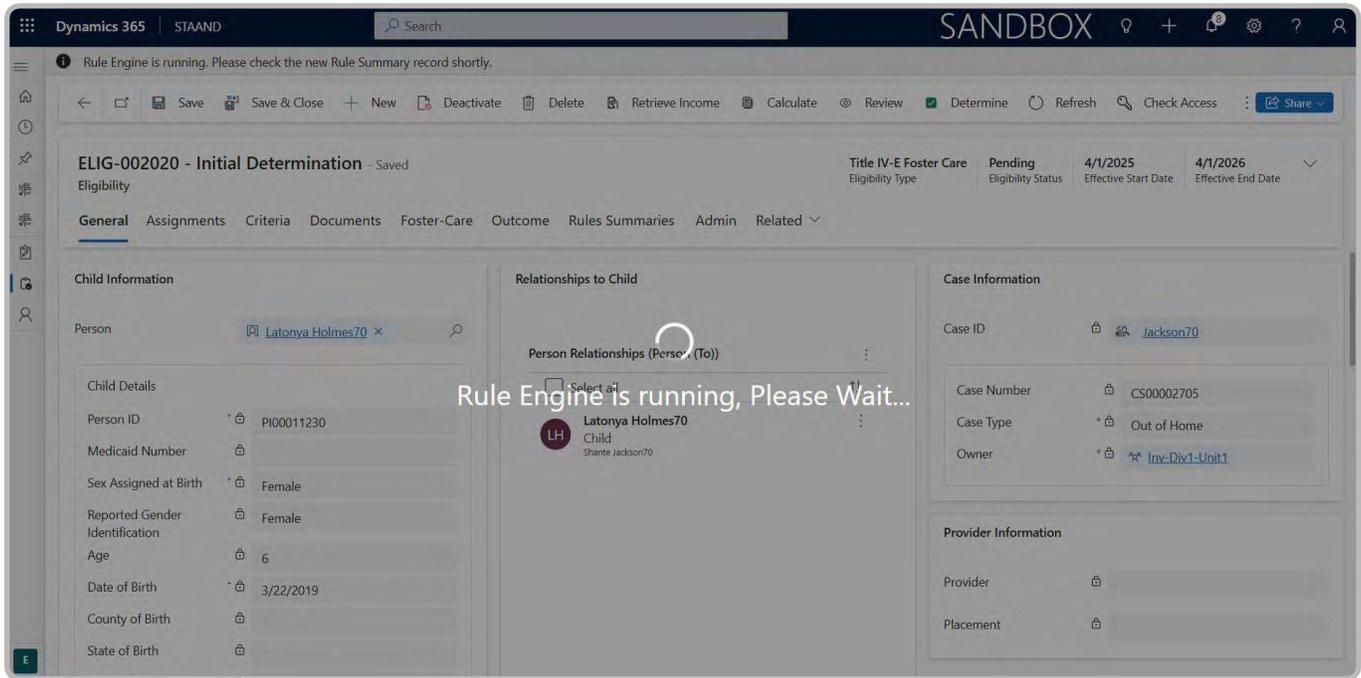
1. From the Eligibility Record, select Determine from the Action Toolbar.



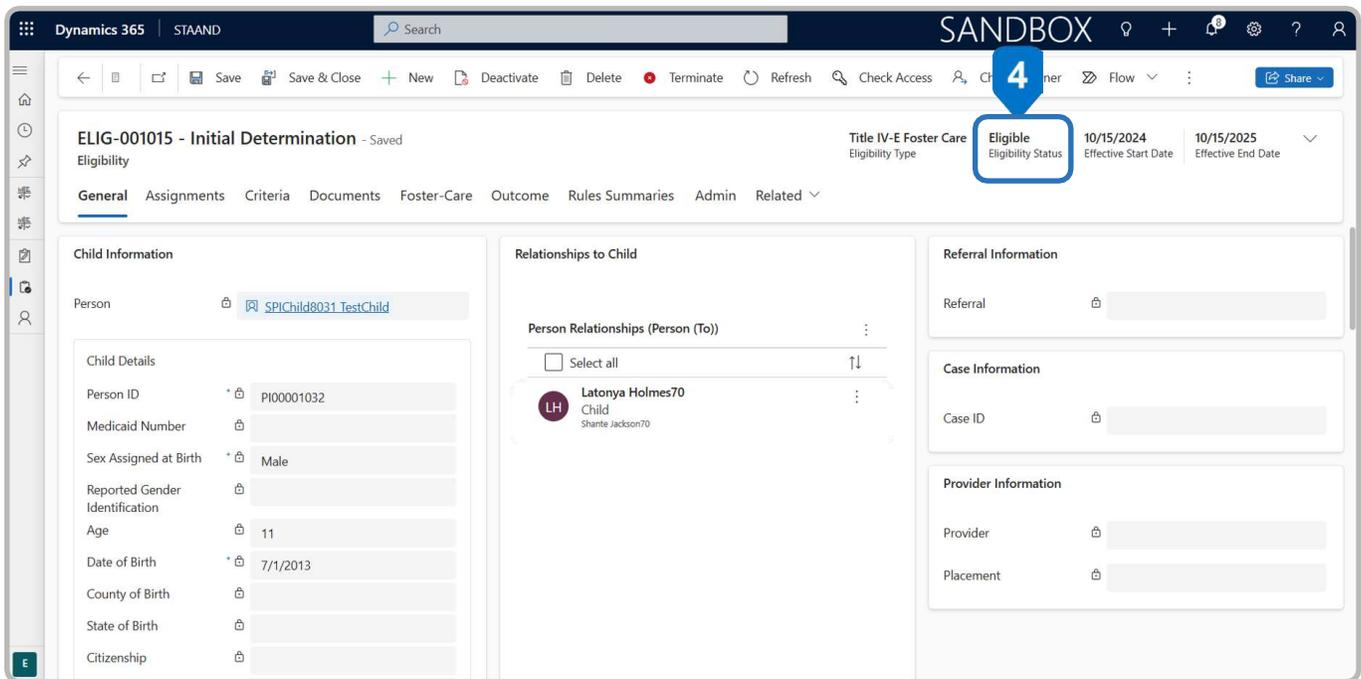
2. Select Yes, determine in the confirmation window.



3. The Rule Engine will begin running to determine eligibility.



4. Once the Rule Engine process is completed, the status will update based on the results.



Adoption Eligibility



Eligibility Record Creation



Eligibility records are automatically created based on specific case events. The process differs for Foster Care Eligibility and Adoption/Guardianship Eligibility, depending on how the Child's case progresses.



Note:

An adoption eligibility record is automatically created when:

- The Finalization Date is entered on the Adoption case record.

How To: Create an Adoption Eligibility Record

1. Navigate to the Case Type field within the Case Details sub-grid. Ensure that the Case Type is Adoption.
2. In the Subsidy Details sub-grid, complete the Adoption/Guardianship Finalization Date field.

The screenshot displays the Dynamics 365 interface for a case named "Latonya Holmes70". The interface is divided into two main sections: "Case Details" and "Subsidy Details".

Case Details:

- Case Number: CS00002705
- Case Type: Adoption (indicated by callout 1)
- Case Open Date: 4/1/2025
- Child: Latonya...
- Adoption Petition Date: ---
- Restricted: No

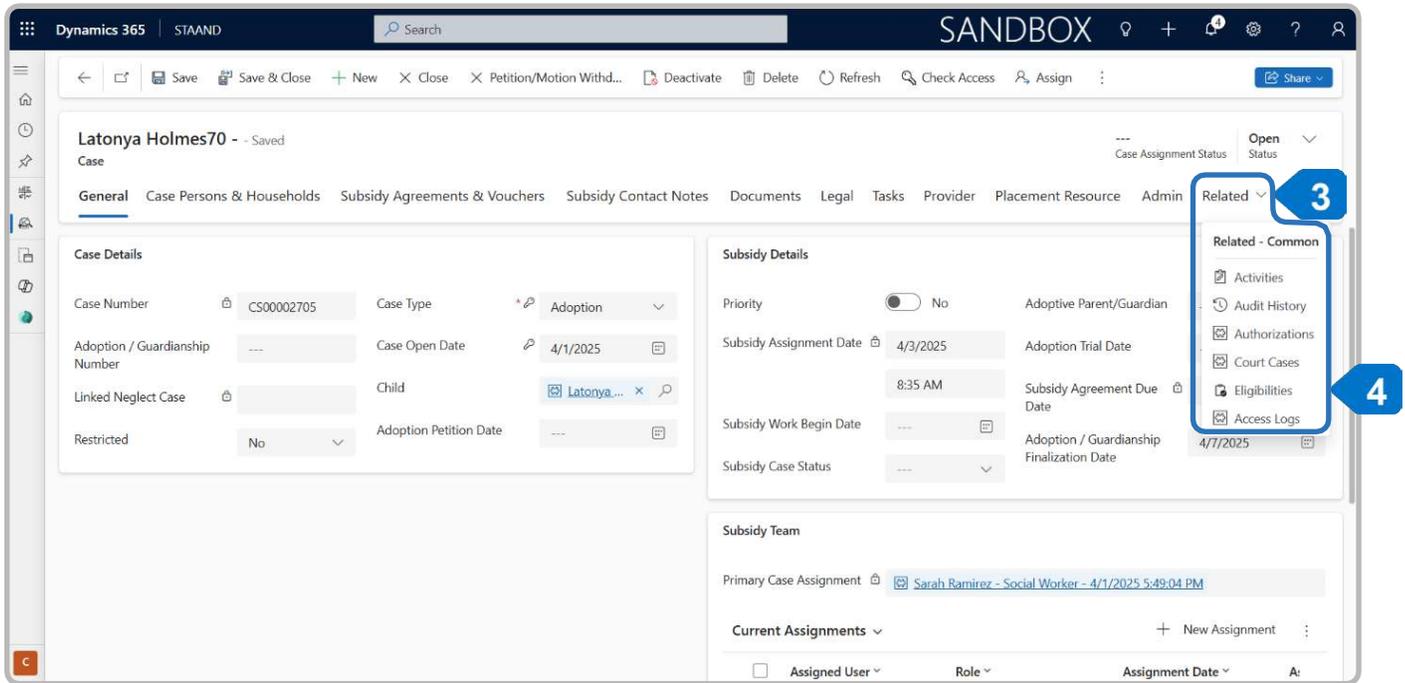
Subsidy Details:

- Subsidy Assignment Date: 4/3/2025
- Adoption Trial Date: ---
- Subsidy Work Begin Date: ---
- Subsidy Agreement Due Date: ---
- Adoption / Guardianship Finalization Date: 4/7/2025 (indicated by callout 2)
- Subsidy Case Status: ---

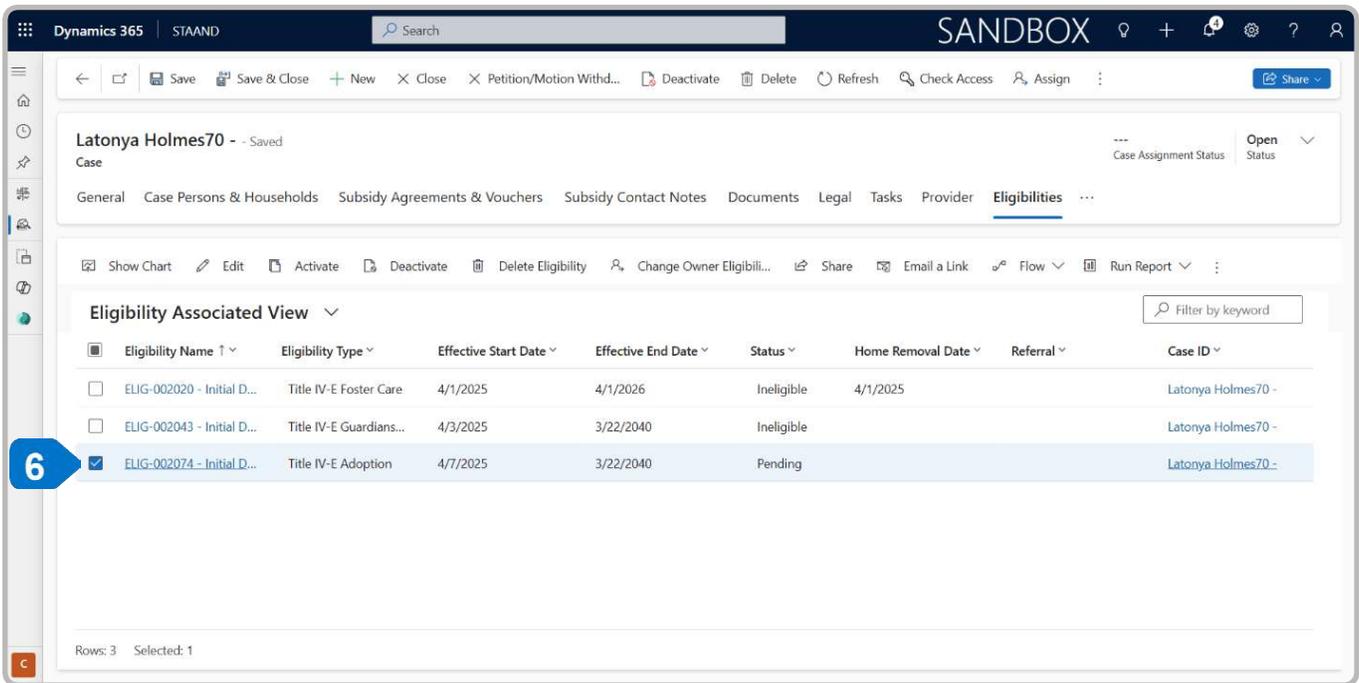
Subsidy Team:

- Primary Case Assignment: Sarah Ramirez - Social Worker - 4/1/2025 5:49:04 PM
- Current Assignments: + New Assignment

3. From the case record, select the Related tab.
4. Select Eligibilities.



5. The Eligibility Record will automatically be created based on the Adoption case type and the Adoption/Guardianship Finalization Date.
6. Select the Eligibility record.



7. The User can now see the Adoption eligibility type, and the Eligibility Status is now Pending.

The screenshot displays the Dynamics 365 interface for an eligibility record. The record is titled "ELIG-002074 - Initial Determination - Saved" and is of type "Title IV-E Adoption Eligibility". The status is "Pending" and the effective start date is 4/7/2025. The child's details include Person ID PI00011230, Sex Assigned at Birth Female, and Date of Birth 3/22/2019. The provider is "Inv-Div1-Unit1".

Note:

Eligibility Specialists must review and update the record to determine Title IV-E Eligibility.

Important Note:

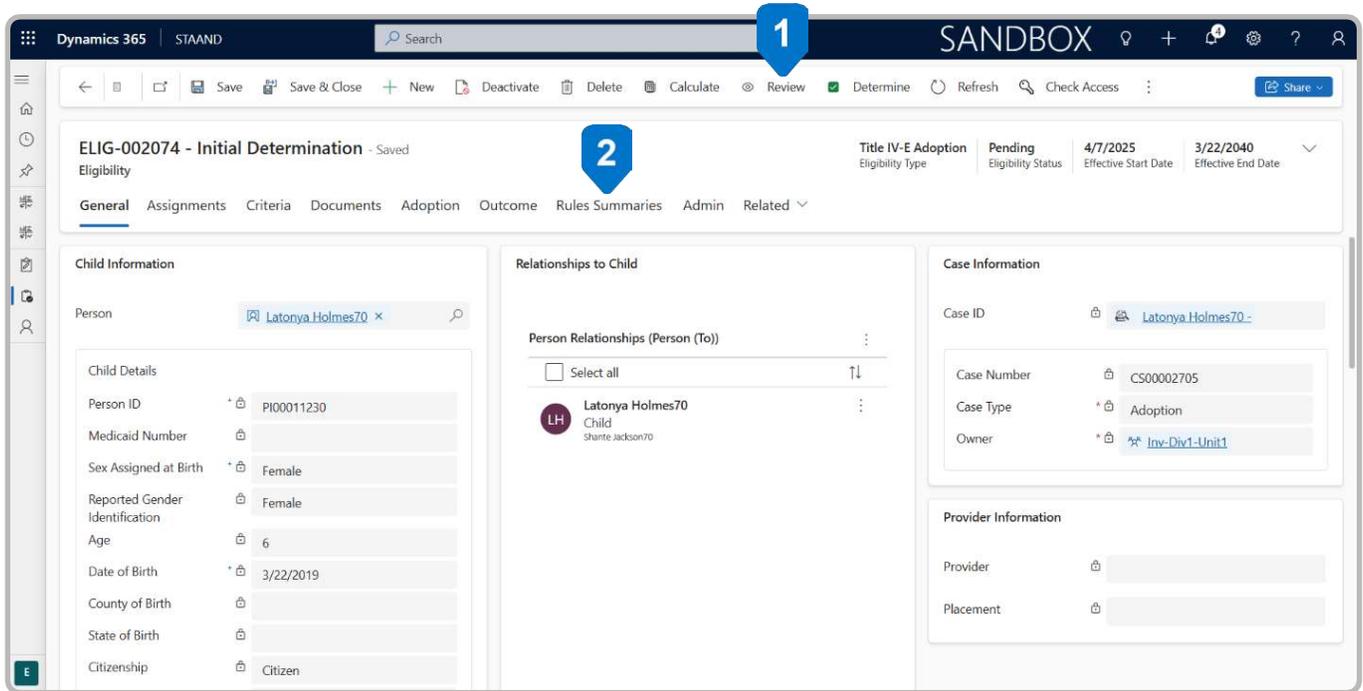
To keep eligibility timelines accurate and compliant without manual updates:

- Adoption eligibility records will **automatically end on the youth's 18th birthday**.
- On that date, the system will **create a copy of the eligibility record**, using the original as the source.
- Set the **start date** to the child's 18th birthday + 1 day, the **end date** to the 21st birthday, and the **status** to **"Ineligible"**.

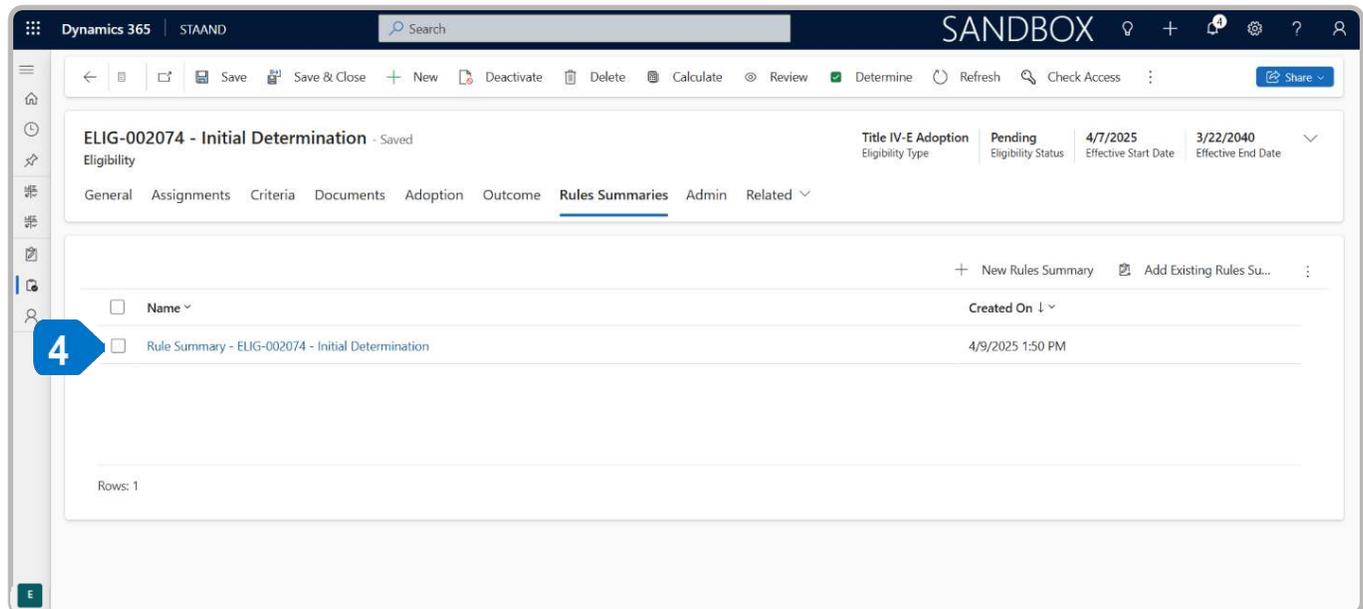
This ensures a **continuous, accurate eligibility timeline** with no gaps or manual work.

How To: Use the Rules of Summaries to Determine Eligibility status

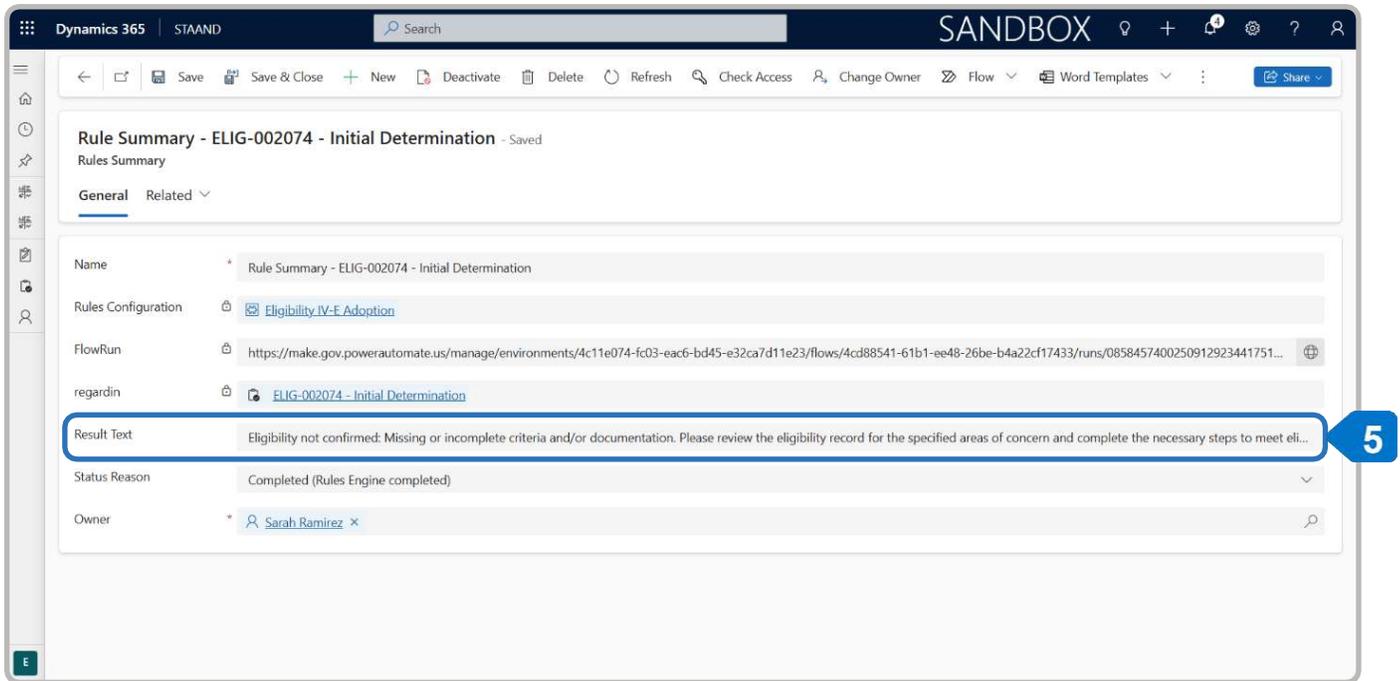
1. Select Review from the Action Toolbar.
2. Select the Rules of Summaries tab once the Rules of Summaries has been completed.



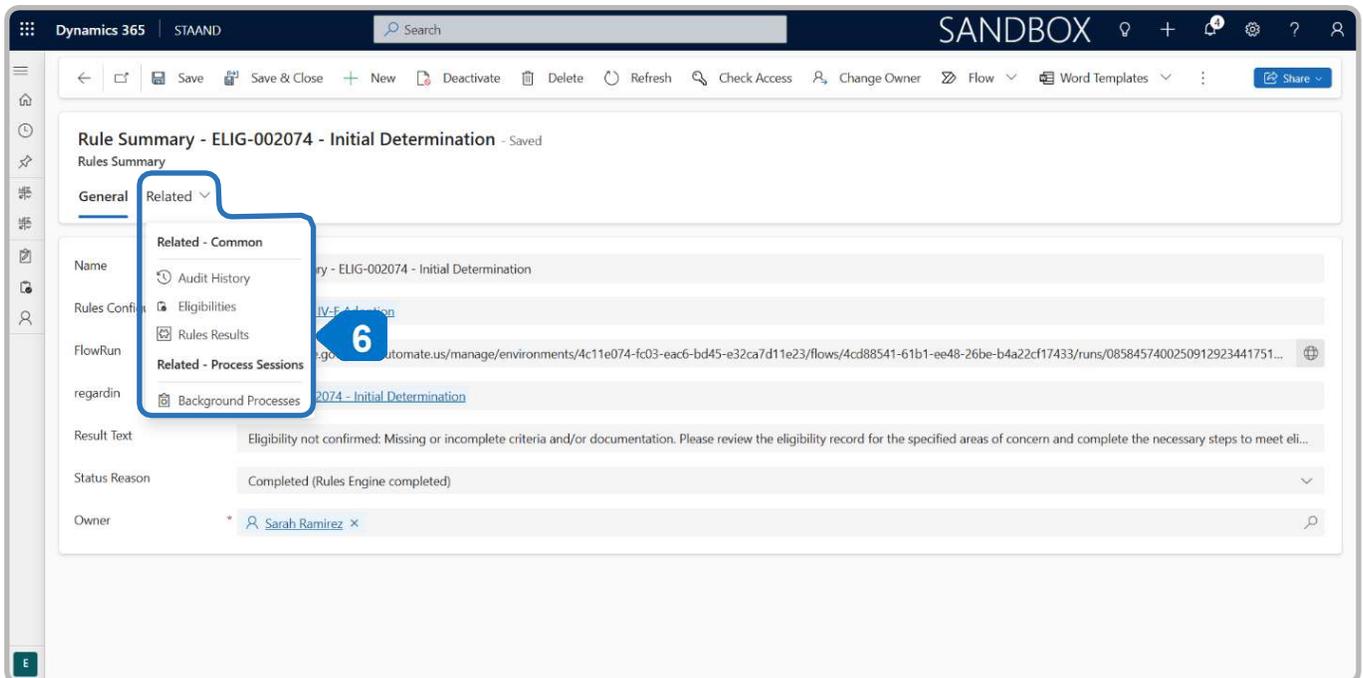
3. The Rule Summary record will populate in the sub-grid.
4. Select the Rules Summary record.



5. On the Rule Summary record, the User will see the Result Text.



6. Select the Rules Results tab from the Related dropdown menu to view the eligibility status of the Child.



- The Rules Results will indicate which areas of the record passed or failed. Any failed areas will need to be addressed to make the Child eligible.

The screenshot shows the Dynamics 365 interface for a 'Rule Summary - ELIG-002074 - Initial Determination'. The 'Rules Results Associated View' sub-grid is highlighted with a blue box. A blue callout bubble with the number '7' points to the sub-grid.

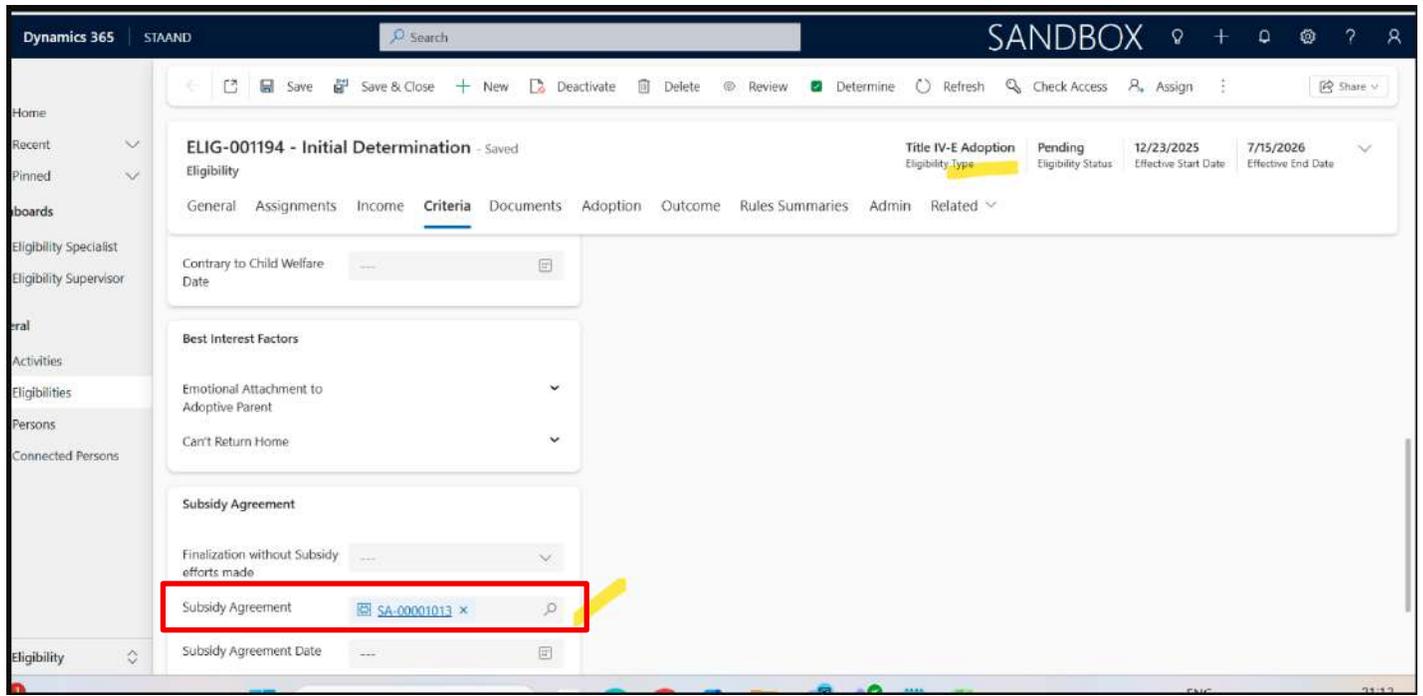
Name	Parent Rule	Rule Status	Rules Output	Result Text	Error Text	Created On
Rule Result for Adoption_Income Limit	Rule Summary - ...	Pass	("Rule Name":"Rule Result for Adoption...	Household's inco...		4/9/2025 1:50 PM
Rule Result for Adoption_Adjudicated R...	Rule Summary - ...	Fail	("Rule Name":"Rule Result for Adoption...	Adjudicated rem...		4/9/2025 1:50 PM
Rule Result for Adoption_Adoption Subs...	Rule Summary - ...	Fail	("Rule Name":"Rule Result for Adoption...	Adoption subsid...		4/9/2025 1:50 PM
Rule Result for Adoption_Adoption With...	Rule Summary - ...	Fail	("Rule Name":"Rule Result for Adoption...	No efforts for ad...		4/9/2025 1:50 PM
Rule Result for Adoption_Applicable Chil...	Rule Summary - ...	Not Applicable	("Rule Name":"Rule Result for Adoption...	Not Applicable		4/9/2025 1:50 PM
Rule Result for Adoption_Emotional Atta...	Rule Summary - ...	Fail	("Rule Name":"Rule Result for Adoption...	No strong emoti...		4/9/2025 1:50 PM
Rule Result for Adoption_Legal Freedom...	Rule Summary - ...	Fail	("Rule Name":"Rule Result for Adoption...	Child is not legall...		4/9/2025 1:50 PM

Important Tip:

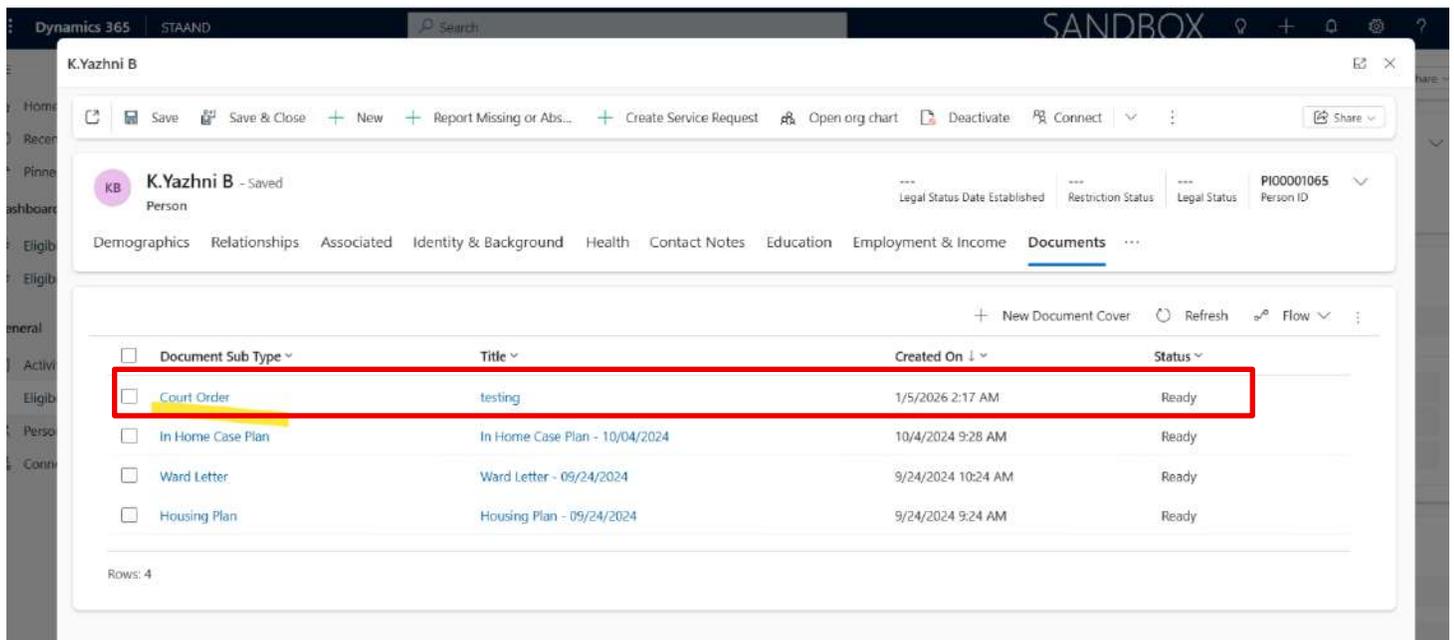
The Rules of Summary can be reviewed at any time within the Rules Results Associated view sub-grid. Additionally, the User can revisit the Rules of Summary process multiple times after items are addressed to check for any additional failed rules.

Eligibility Adoption Pre-Determination Checks

1. Go to Eligibility-->Eligibility>>Create an Adoption Eligibility
2. Navigate to the Criteria tab and the Subsidy Agreement.



3. Click on the Documents tab to ensure the Subsidy Agreement has been uploaded.



4. Click the Rules Summary tab to view the Rule Status.

Rule Summary - ELIG-001194 - Initial Determination - Saved

Rules Summary

General Rules Results Related

Show Chart + New Rules Results Add Existing Rules Res... Refresh Flow Run Report Excel Templates Export Rules Results

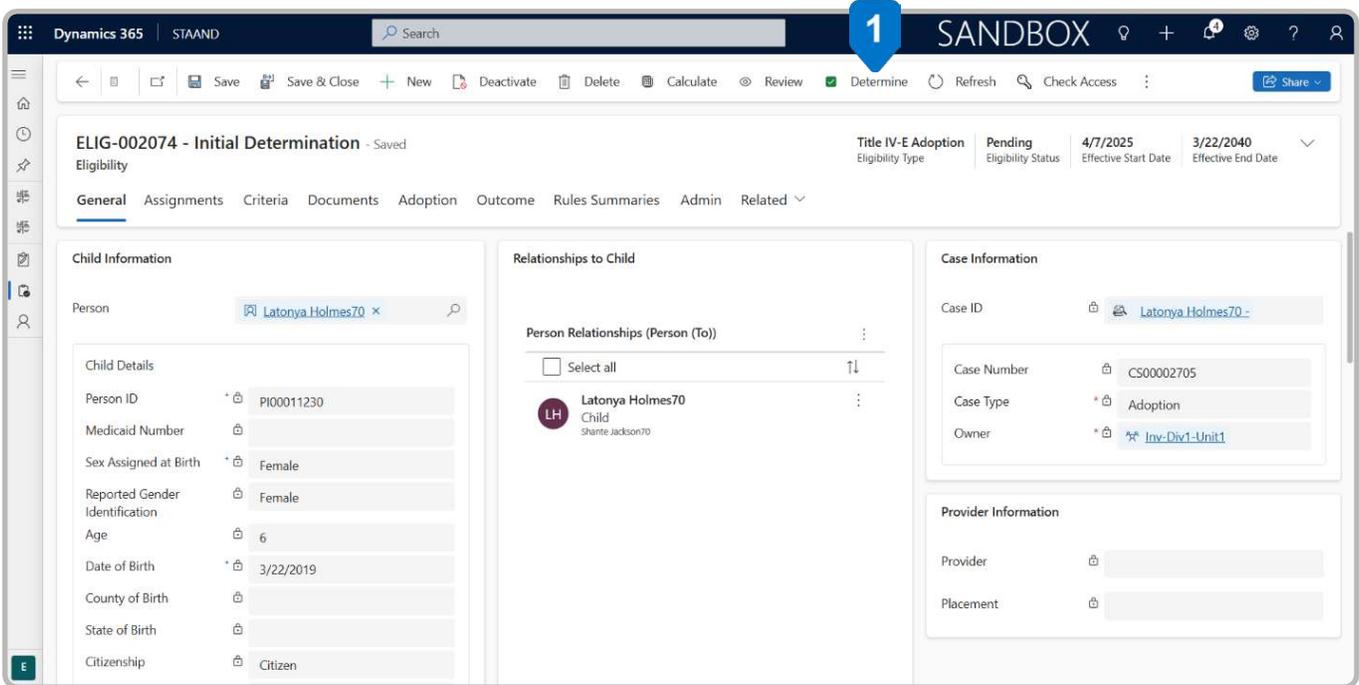
Rules Results Associated View Filter by keyword

<input type="checkbox"/>	Name	Parent Rule	Rule Status	Rules Output	Result Text	Error Text	Created
<input type="checkbox"/>	Rule Result for Adoption_Legal Freedom for Adoption	Rule Summary ...	Fail	("Rule Name":"Rule Result for Adopti...	Child is not leg...		1/5/2...
<input type="checkbox"/>	Rule Result for Adoption_Pre-Determination Checks	Rule Summary ...	Pass	("Rule Name":"Rule Result for Adopti...	Pre-determinati...		1/5/2...
<input type="checkbox"/>	Rule Result for Adoption_Sibling of Applicable Child in Sa...	Rule Summary ...	Not Applicable	("Rule Name":"Rule Result for Adopti...	Not Applicable		1/5/2...
<input type="checkbox"/>	Rule Result for Adoption_Special Needs Conditions	Rule Summary ...	Fail	("Rule Name":"Rule Result for Adopti...	Child does not ...		1/5/2...
<input type="checkbox"/>	Rule Result for Adoption_Sibling of Applicable Child in Sa...	Rule Summary ...	Not Applicable	("Rule Name":"Rule Result for Adopti...	Not Applicable		1/5/2...

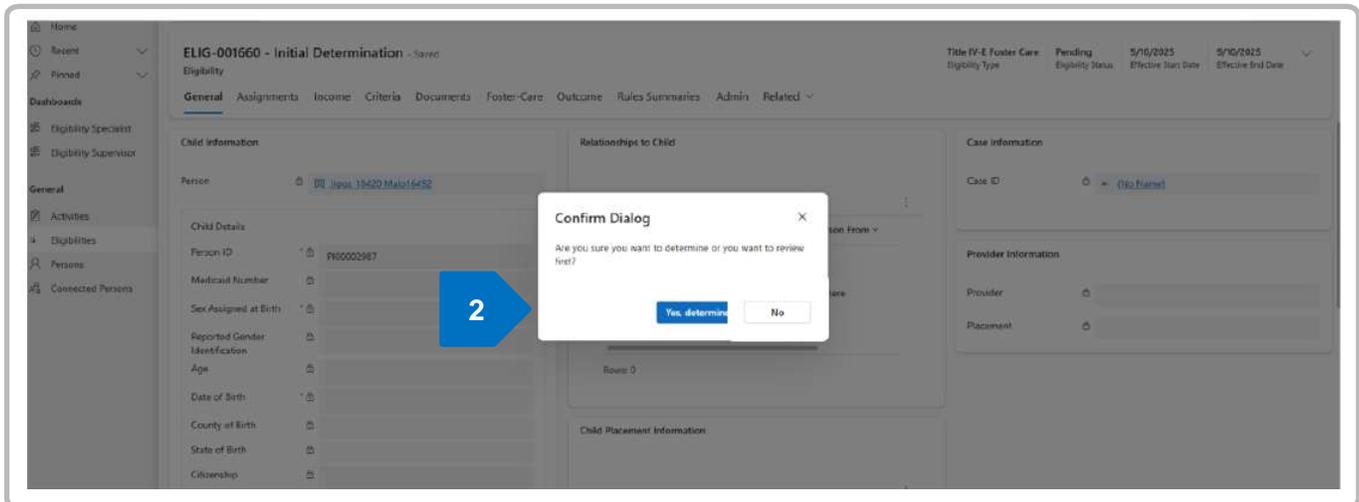
Rows: 12

How To: Determine IV-E Adoption Eligibility

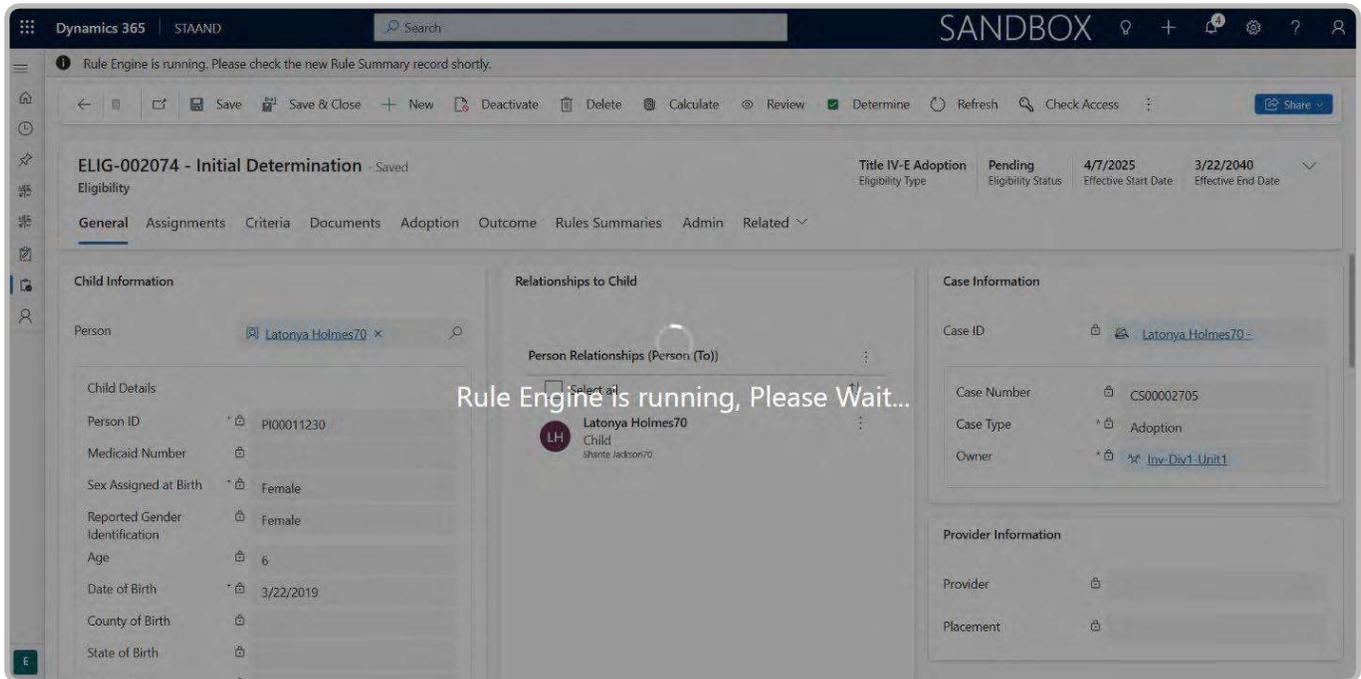
1. From the Eligibility record, select Determine from the Action Toolbar.



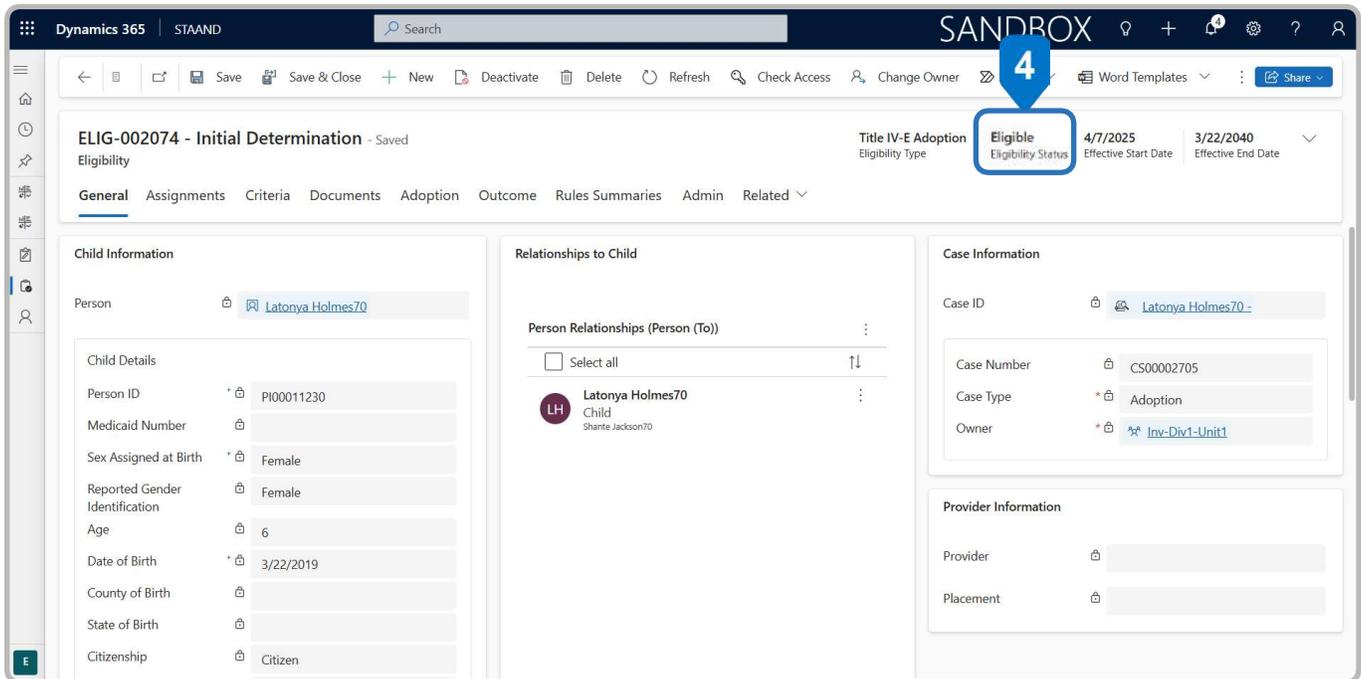
5. Select Yes, determine.



6. The Rule Engine will begin running to determine eligibility.



7. When the Rule Engine process is complete, the status will be updated based on the result.



Guardianship Eligibility



Eligibility Record Creation



Eligibility records are automatically created based on specific case events. The process differs for Foster Care Eligibility and Adoption/Guardianship Eligibility, depending on how the Child's case progresses.



Note:

A guardianship eligibility record is automatically created when:

- The Finalization Date is entered on the Guardianship case record.

How To: Create a Guardianship Eligibility Record

1. Navigate to the Case Type field within the Case Details sub-grid. Ensure that the Case Type is Guardianship.
2. In the Subsidy Details sub-grid, complete the Adoption/Guardianship Finalization Date field.

The screenshot displays the Dynamics 365 interface for a case named "Latonya Holmes70". The interface is divided into two main sections: "Case Details" and "Subsidy Details".

Case Details:

- Case Number: CS00002705
- Case Type: Guardianship (indicated by callout 1)
- Case Open Date: 4/1/2025
- Child: Latonya...
- Guardianship Motion Date: 4/3/2025

Subsidy Details:

- Subsidy Assignment Date: 4/3/2025
- Subsidy Work Begin Date: 8:35 AM
- Adoption / Guardianship Finalization Date: 4/3/2025 (indicated by callout 2)

Subsidy Team:

- Primary Case Assignment: Sarah Ramirez - Social Worker - 4/1/2025 5:49:04 PM

3. Select Eligibilities from the Related dropdown menu.

The screenshot shows the Dynamics 365 interface for a case named 'Latonya Holmes70'. The 'Related' dropdown menu is open, and the 'Eligibilities' option is highlighted. A blue callout box with the number '3' is positioned next to the 'Eligibilities' option.

4. Select the Eligibility record.

The screenshot shows the 'Eligibilities' view for the case 'Latonya Holmes70'. A table lists eligibility records. The second row, 'ELIG-002043 - Initial...', is selected with a checkmark. A blue callout box with the number '4' is positioned next to the selected row.

Eligibility Name	Eligibility Type	Effective Start Date	Effective End Date	Status	Home Removal Date	Referral	Case ID
ELIG-002020 - Initial ...	Title IV-E Foster Care	4/1/2025	4/1/2026	Ineligible	4/1/2025		Latonya Holmes70 -
<input checked="" type="checkbox"/> ELIG-002043 - Initial...	Title IV-E Guardians...	4/3/2025	3/22/2040	Pending			Latonya Holmes70 -

Note:

The Eligibility Record will automatically be created based on the Guardianship case type and the Adoption/Guardianship Finalization Date.

5. The User can now see the Guardianship eligibility type, and the Eligibility Status is now Pending.

The screenshot shows the Dynamics 365 interface for an eligibility record. The record is titled "ELIG-002043 - Initial Determination" and is saved. The eligibility type is "Title IV-E Guardianship" and the status is "Pending". The effective start date is 4/3/2025 and the effective end date is 3/22/2040. The child's name is Latonya Holmes70. The record is associated with a case ID "Latonya Holmes70 -" and a case number "CS00002705". The case type is "Guardianship" and the owner is "Inv-Div1-Unit1". The provider information is also visible.

Note:

Eligibility Specialists must review and update the record to determine Title IV-E Eligibility.

Important Note:

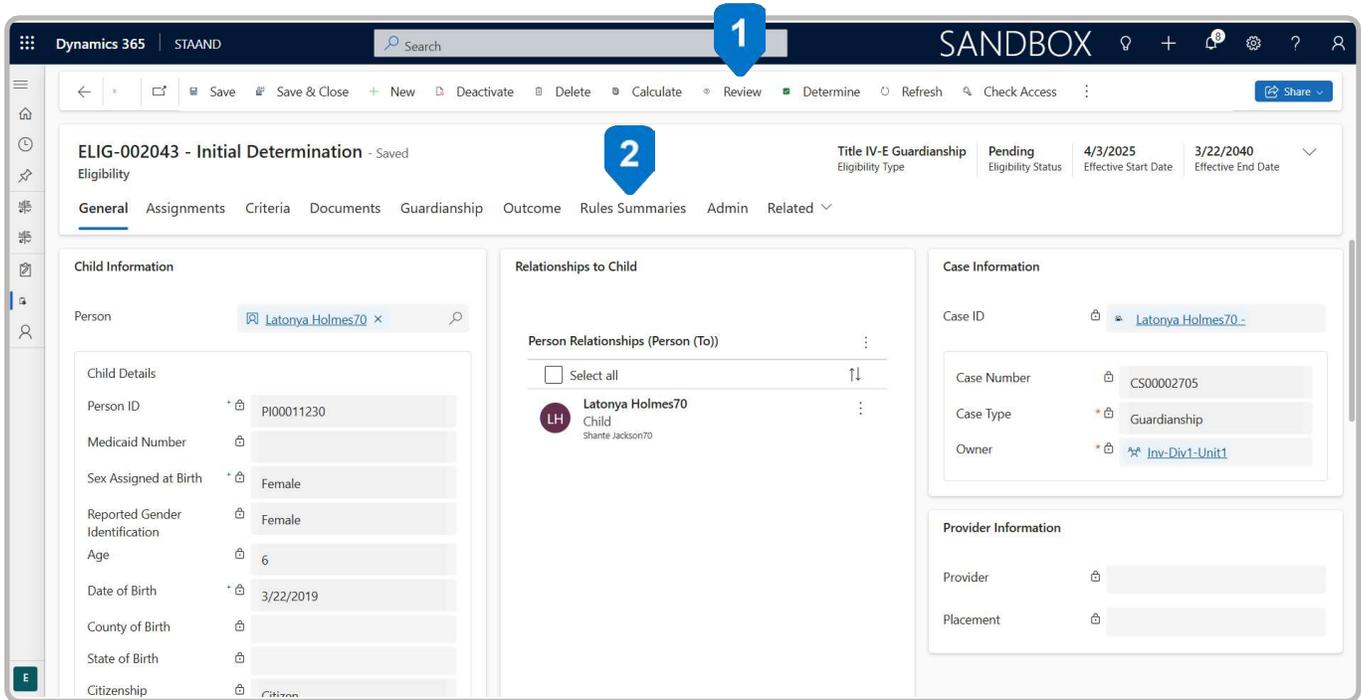
To keep eligibility timelines accurate and compliant without manual updates:

- Guardianship eligibility records will **automatically end on the youth's 18th birthday**.
- On that date, the system will **create a copy of the eligibility record**, using the original as the source.
- Set the **start date** to the child's 18th birthday + 1 day, the **end date** to the 21st birthday, and the **status** to "Ineligible".

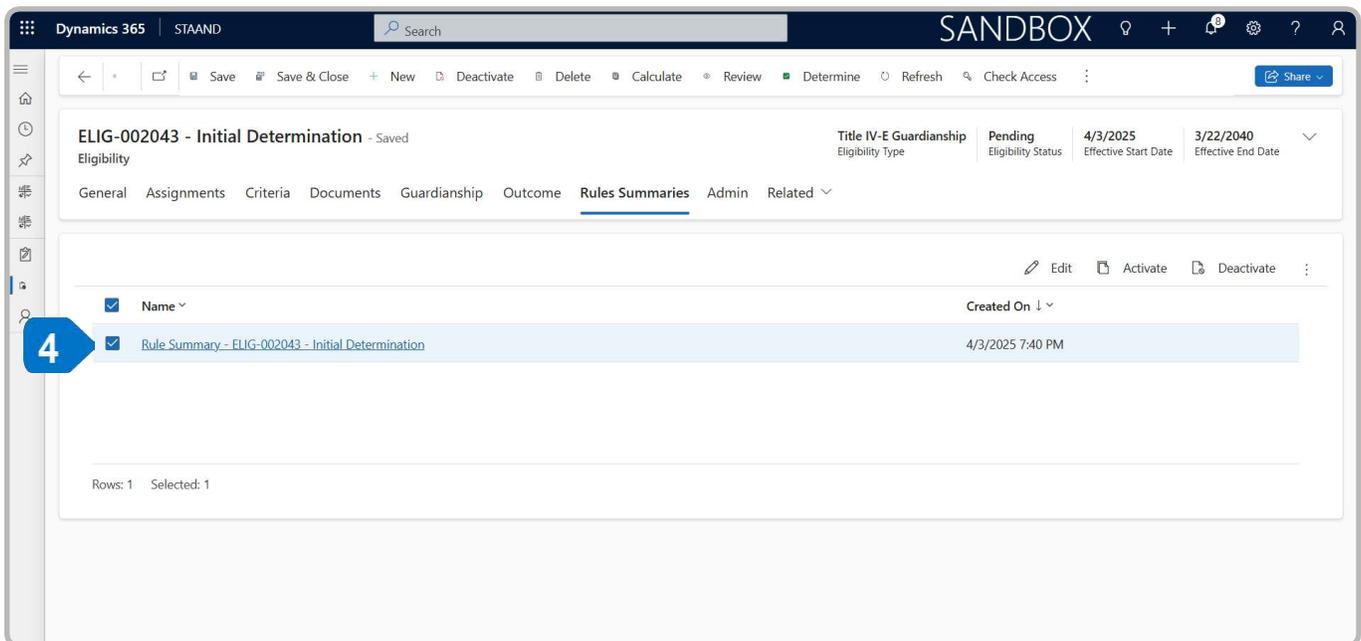
This ensures a **continuous, accurate eligibility timeline** with no gaps or manual work.

How To: Use the Rules of Summaries to Determine Eligibility status

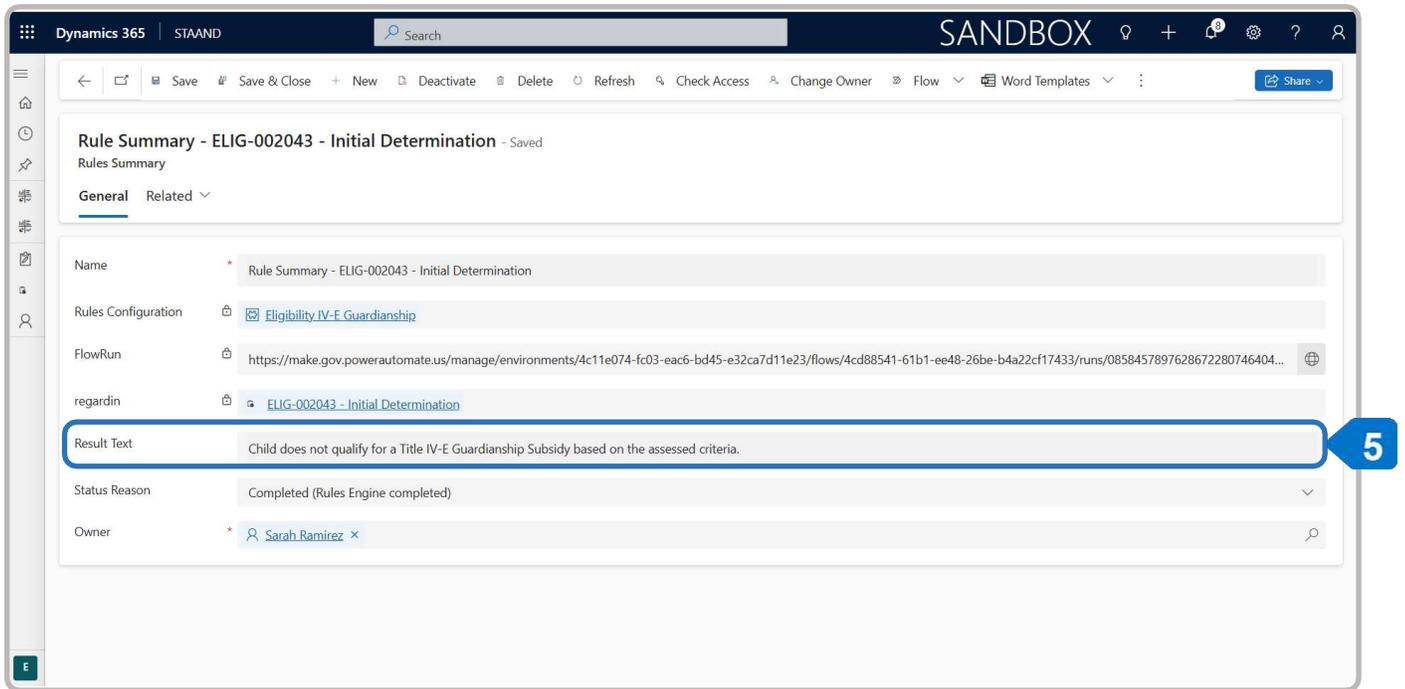
1. Select Review from the Action Toolbar.
2. Select the Rules of Summaries tab once the Rules of Summaries has been completed.



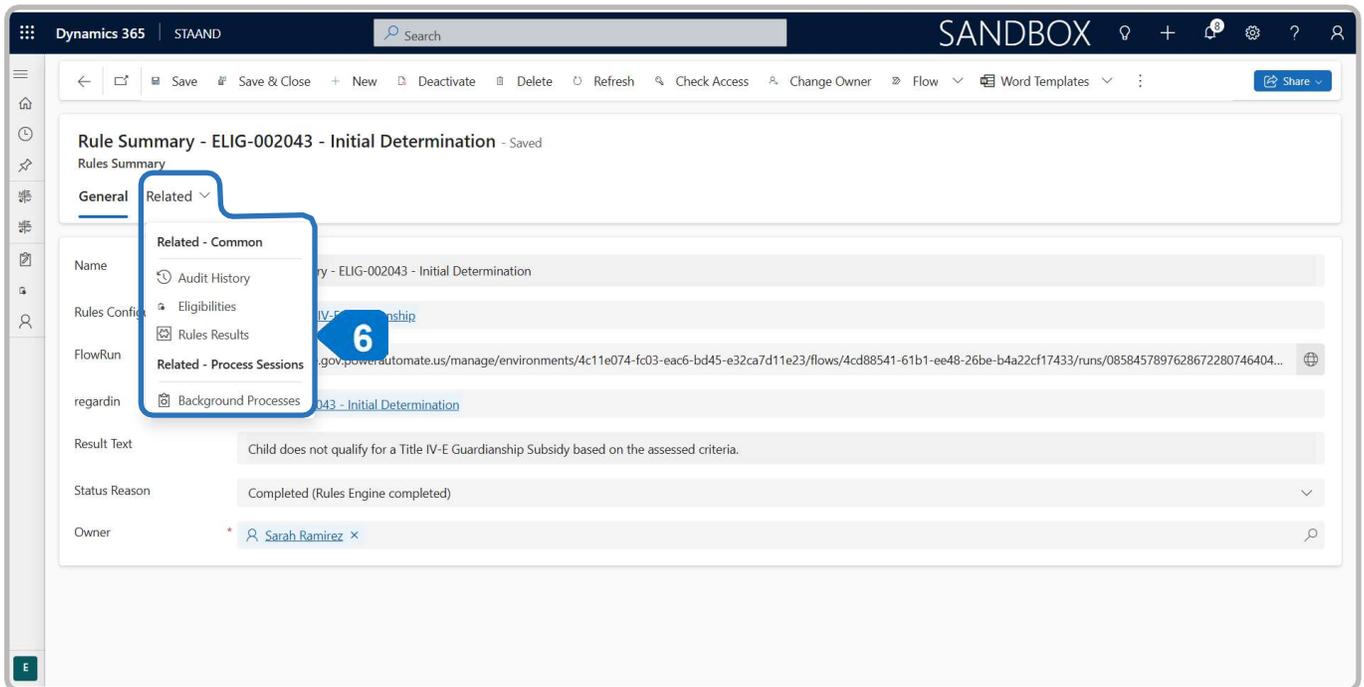
3. The Rule Summary will populate in the sub grid.
4. Select the Rules Summary record.



5. On the Rule Summary record, the User will see the Result Text.



6. Select Rules Results to view the eligibility status of the Child.



- The Rules Results will indicate which areas of the record passed or failed. Any failed areas will need to be addressed in order to make the Child eligible.

Rule Summary - ELIG-002043 - Initial Determination - Saved

Rules Results Associated View

Name	Parent Rule	Rule Status	Rules Output	Result Text	Error Text	Created On
Rule Result for Guardianship_Child Age a...	Rule Summary - ...	Pass	("Rule Name":"Rule Result for Guardiansh...	Child's age and c...		4/3/2025 7:40 PM
Rule Result for Guardianship_Child Attac...	Rule Summary - ...	Fail	("Rule Name":"Rule Result for Guardiansh...	Either strong atta...		4/3/2025 7:40 PM
Rule Result for Guardianship_Kinship Car...	Rule Summary - ...	Fail	("Rule Name":"Rule Result for Guardiansh...	Guardian is not d...		4/3/2025 7:40 PM
Rule Result for Guardianship_Length Of S...	Rule Summary - ...	Fail	("Rule Name":"Rule Result for Guardiansh...	Does not meet th...		4/3/2025 7:40 PM
Rule Result for Guardianship_Permanenc...	Rule Summary - ...	Fail	("Rule Name":"Rule Result for Guardiansh...	At least one per...		4/3/2025 7:40 PM
Rule Result for Guardianship_Sibling Gro...	Rule Summary - ...	Fail	("Rule Name":"Rule Result for Guardiansh...	Not all criteria for...		4/3/2025 7:40 PM
Rule Result for Guardianship_Subsidy Ag...	Rule Summary - ...	Fail	("Rule Name":"Rule Result for Guardiansh...	Subsidy agreeeme...		4/3/2025 7:40 PM

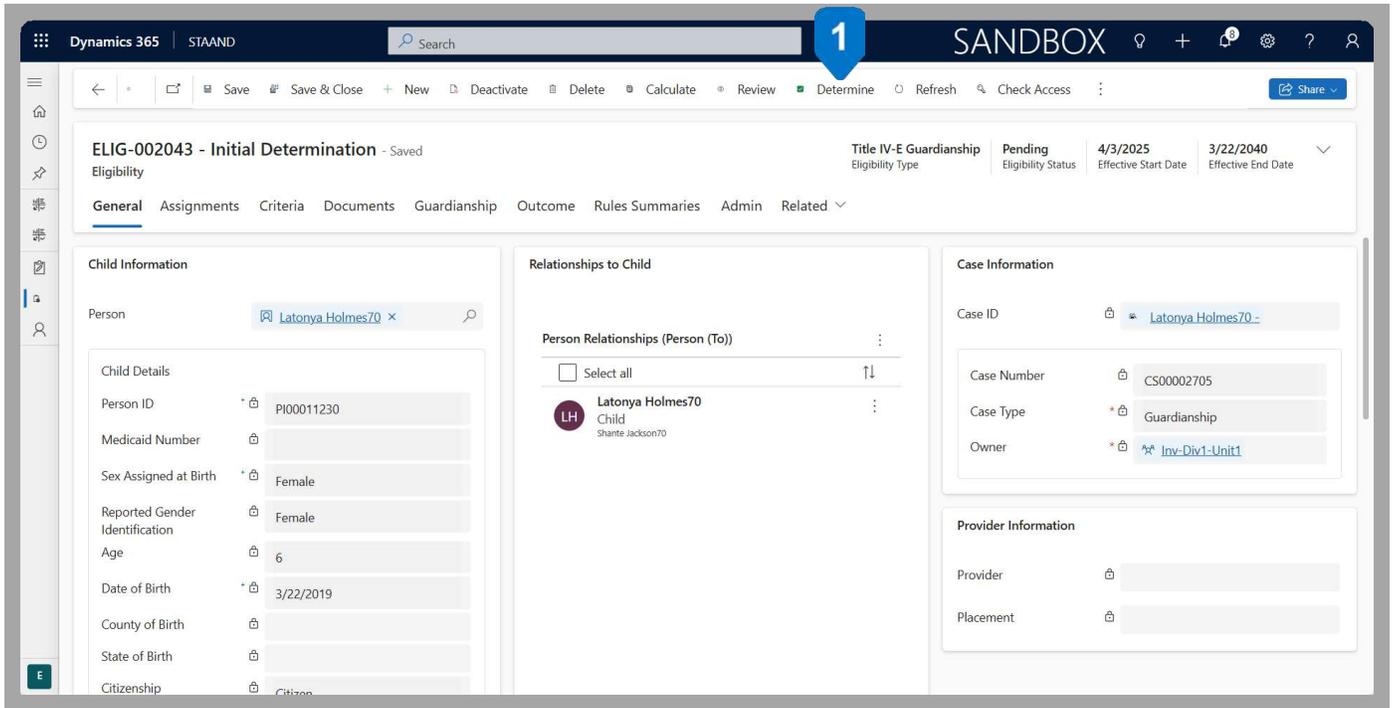
Rows: 7

Important Tip:

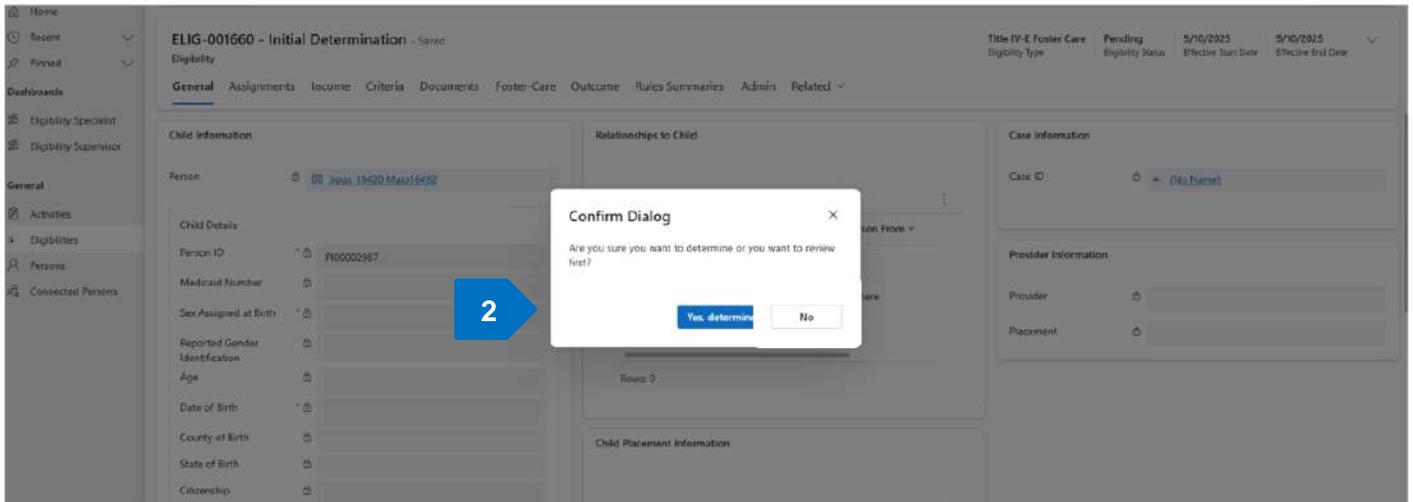
The Rules of Summary can be reviewed at any time within the Rules Results Associated view sub-grid. Additionally, the User can revisit the Rules of Summary process multiple times after items are addressed to check for any additional failed rules.

How To: Determine IV-E Guardianship Eligibility

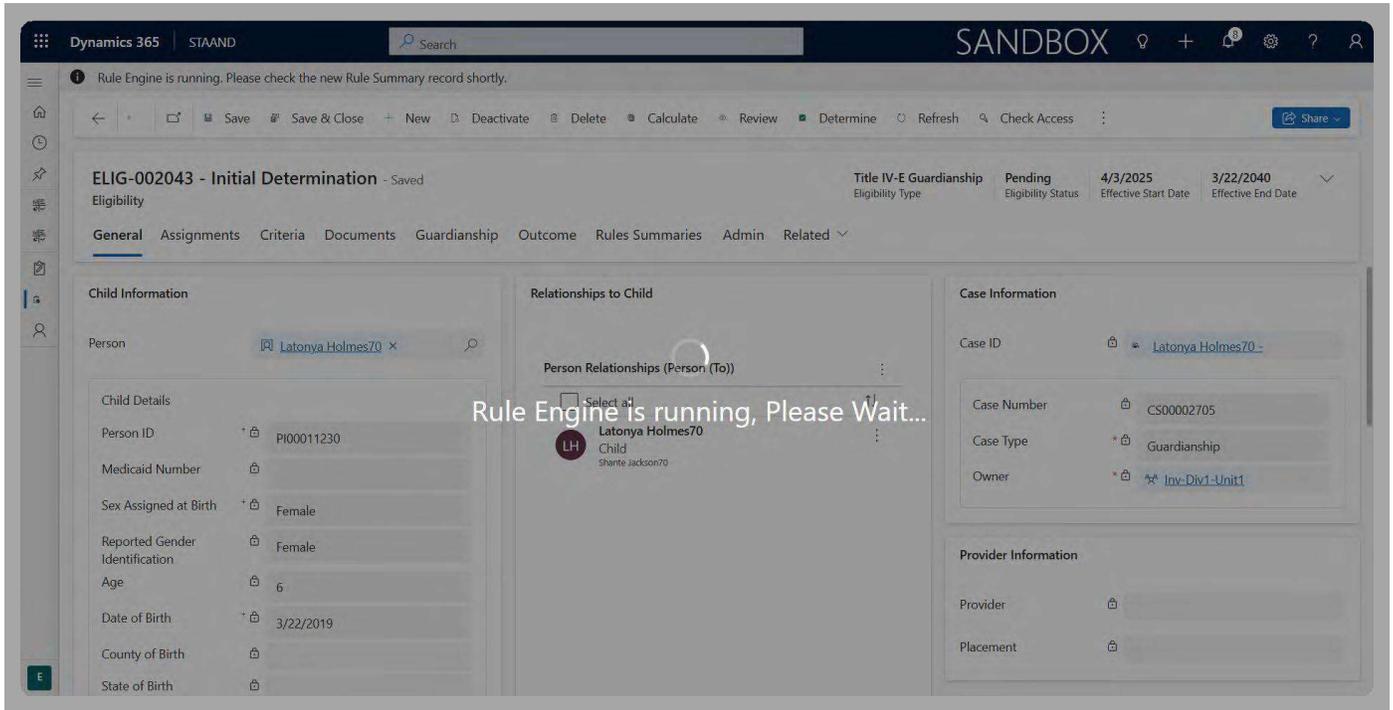
1. From the Eligibility Record, select Determine from the Action Toolbar.



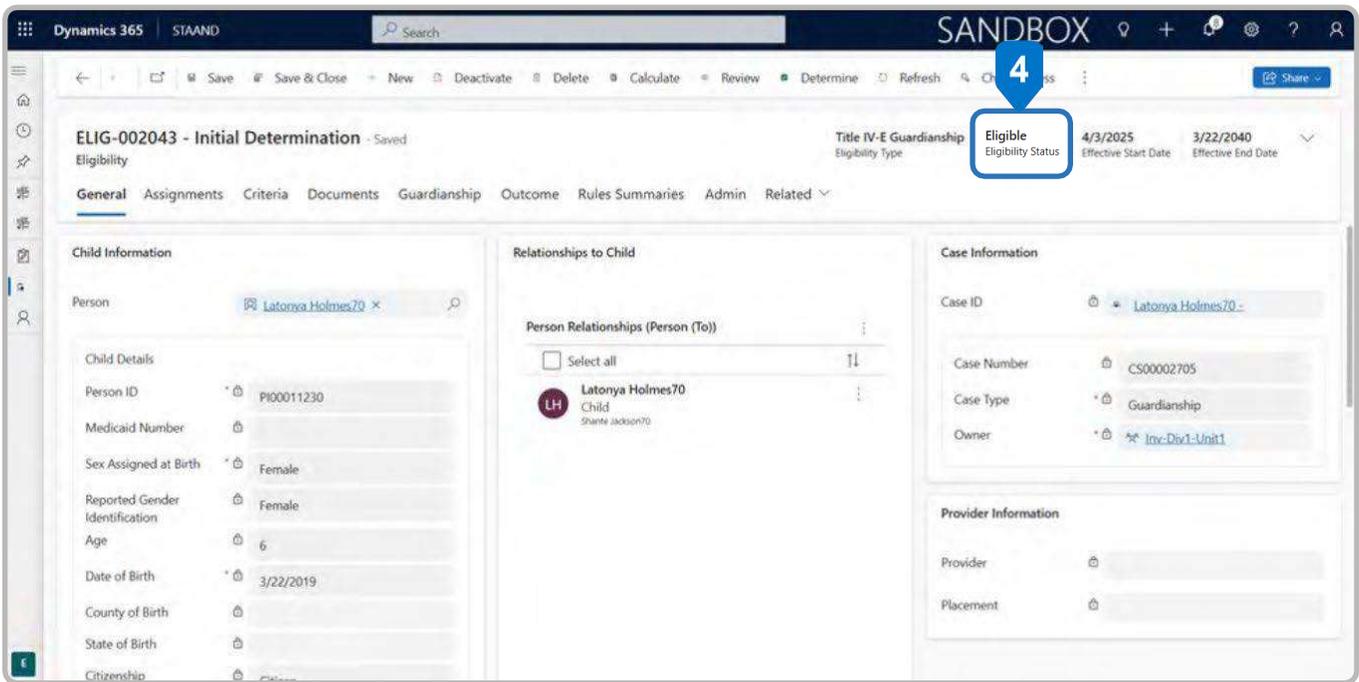
2. Select Yes, determine.



3. The Rule Engine will begin running to determine eligibility.



4. When the Rule Engine process is complete, the status will be updated based on the result.



Subsidy

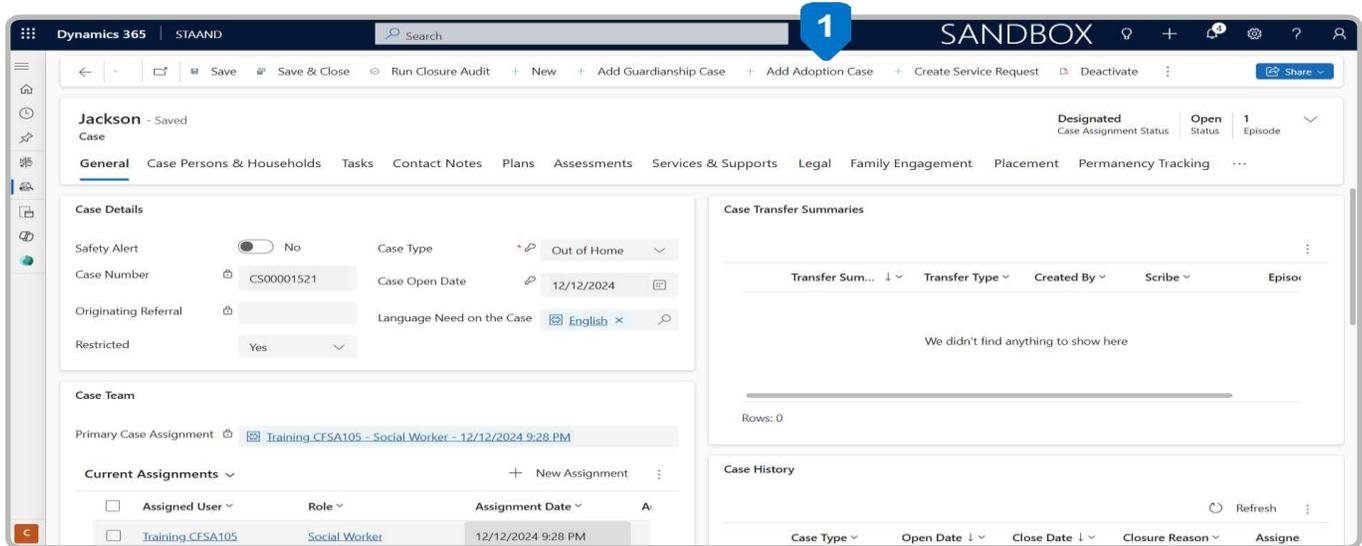


Subsidy Adoption

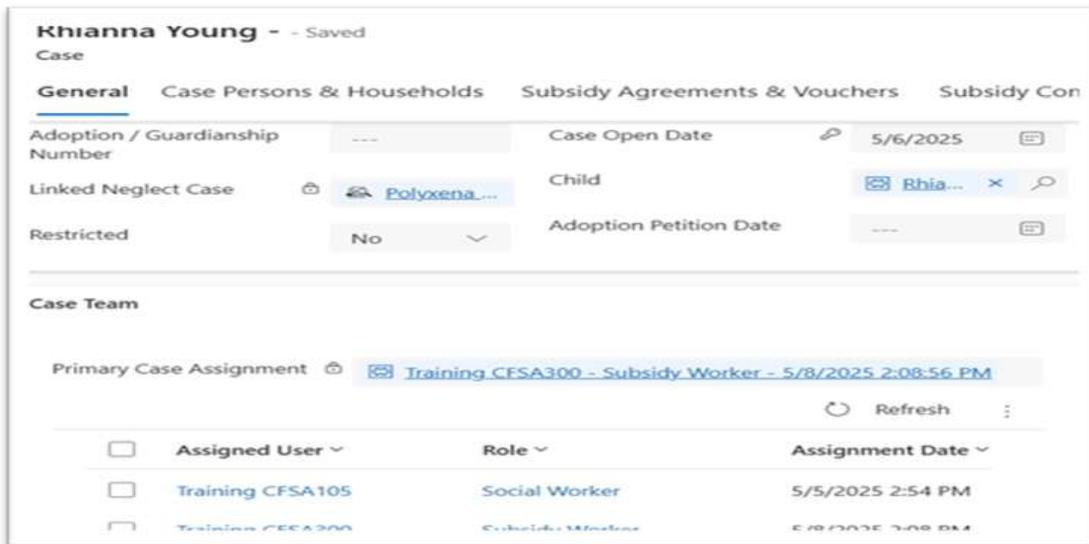


How To: Manage a Subsidy Adoption Case

1. The Social Worker Supervisor or designee selects +Add Adoption Case from the Action Toolbar.



2. The Primary Case Assignment details from the Case Team will auto-populate (from the neglect case).





Note:

After the guardianship/adoption is established, the Case Team assignments will automatically transfer from foster care to the adoption case.

3. Under the General tab, in the Case Details sub-grid, complete the following fields:
 - a. Enter the Adoption/Guardianship Number.
 - b. Select the Child for adoption.
 - c. Enter the Adoption Petition Date.

The screenshot displays the Dynamics 365 interface for a case named CS00001272. The 'Case Details' sub-grid is highlighted with a red box and contains the following fields:

- Case Number: CS00001272 (labeled 3.a)
- Case Type: Adoption
- Adoption / Guardianship Number: (empty)
- Case Open Date: 10/3/2025
- Child: (empty) (labeled 3.b)
- Adoption Petition Date: (empty) (labeled 3.c)
- Restricted: No

The 'Subsidy Details' section contains the following fields:

- Priority: No
- Adoptive Parent/Guardian: (empty)
- Subsidy Assignment Date: (empty)
- Adoption Trial Date: (empty)
- Subsidy Work Begin Date: (empty)
- Subsidy Agreement Due Date: (empty)
- Subsidy Case Status: (empty)
- Adoption / Guardianship Finalization Date: (empty)

The 'Case Team' section shows a Primary Case Assignment field and a table for Case Team assignments with columns for Assigned User, Role, and Assignment Date.

4. The Supervisor Social Worker (Subsidy) or designee assigns the Subsidy case.

The screenshot shows the 'Subsidy Team' interface. At the top, there is a 'Primary Case Assignment' section with a lock icon and a link: 'Training CFSA300 - Subsidy Worker - 5/6/2025 3:16:15 PM'. Below this is a 'Current Assignments' section with a dropdown arrow and a '+ New Assignment' button. A table below lists the assignments:

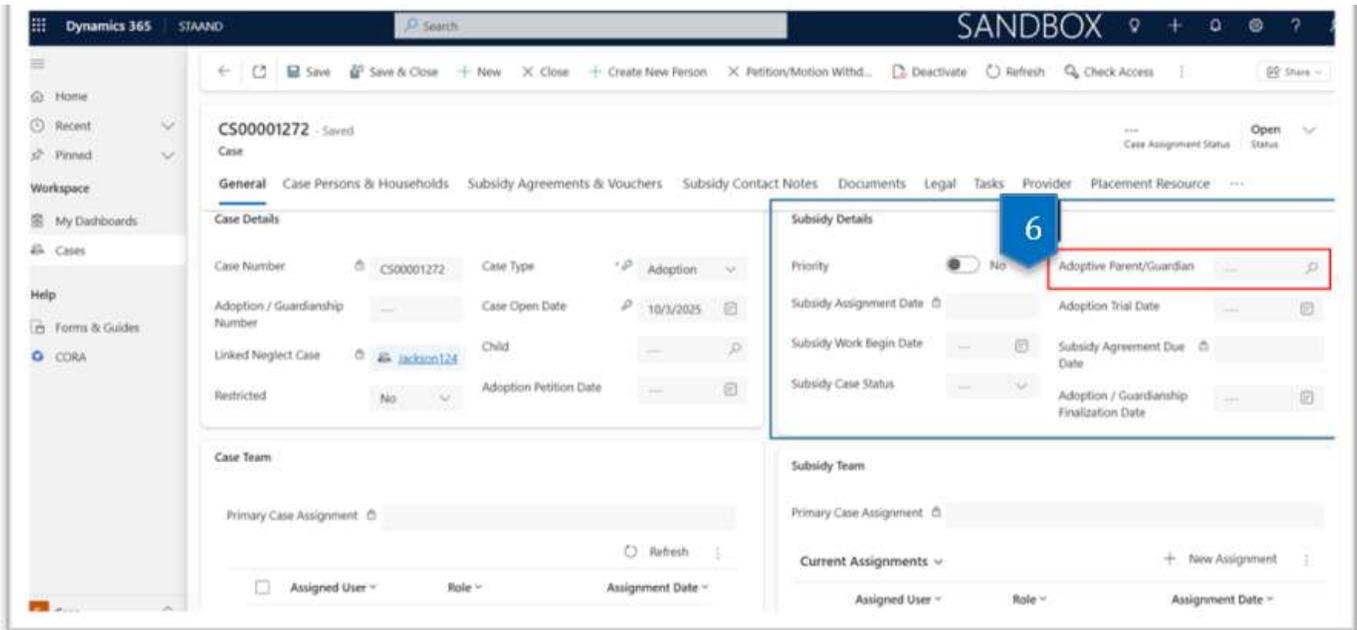
<input type="checkbox"/>	Assigned User	Role	Assignment Date
<input type="checkbox"/>	Training CFSA300	Subsidy Worker	5/6/2025 3:16 PM

5. Create a Subsidy Voucher (This voucher is completed by the Eligibility Specialist or designee).

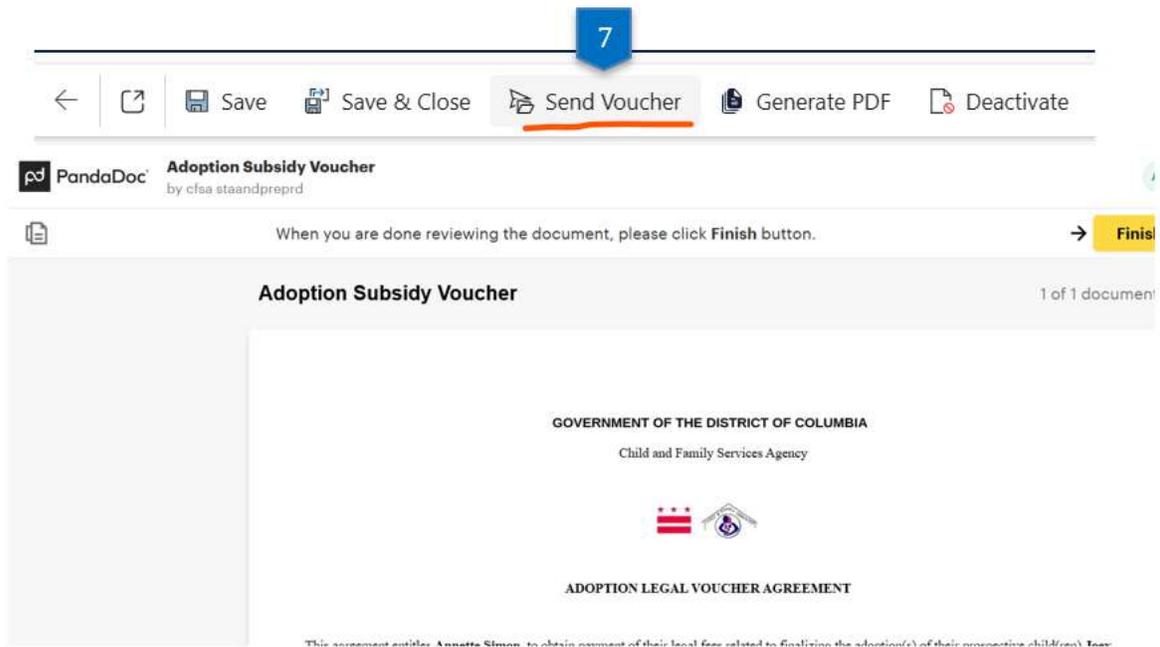
The screenshot shows the 'Subsidy Vouchers' interface. At the top, there is a blue shield icon with the number '5'. Below this is a table with columns 'Name' and 'Created On'. The table is empty, with the text 'We didn't find anything to' and 'Rows: 0' displayed. A context menu is open on the right, listing the following options:

- + More commands for Subsidy Vou
- Refresh
- Flow
- Run Report
- Excel Templates
- Export Subsidy Vouchers
- See all records

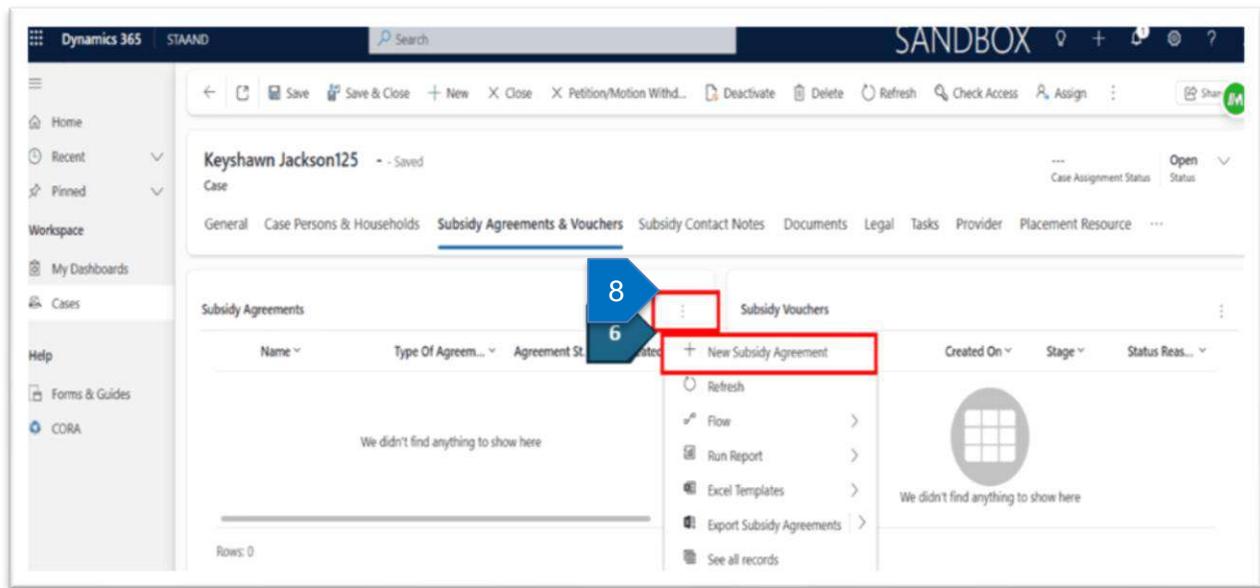
- The subsidy Social Worker will complete the Subsidy Details sub-grid. Parent/Guardian.



- Click on the **Subsidy Agreement & Voucher** tab to complete the **Subsidy Voucher**. Complete the screen then save. After saving, click the **Send Voucher** button on the ribbon, a copy is sent via **Panda Doc** to the **Attorney** and **Adopted Parents** thru email to review and sign. Once the **Attorney and Parent** review and sign the voucher it is sent to the **Administrator** for the final signature.



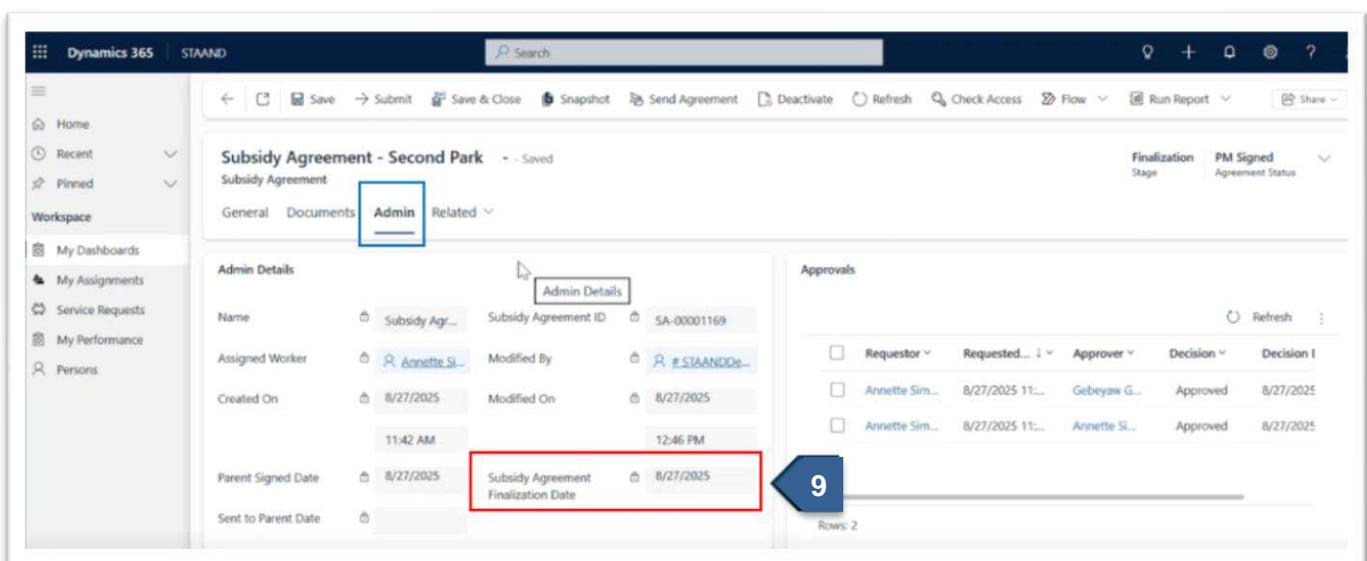
8. Select the **Subsidy Agreements & Vouchers** tab, then click the **3 dots** to select **+New Subsidy Agreement** and complete the **Subsidy Agreement**.



Note:

The supervisor approves; PM approves then the agreement is sent to the Adopted parent via Panda doc to review and sign. The PM approves the complete document and signs the agreement. Completed copies are sent to all parties.

9. Click the **Admin** tab to locate the **Subsidy Agreement Finalization Date**.





Note:

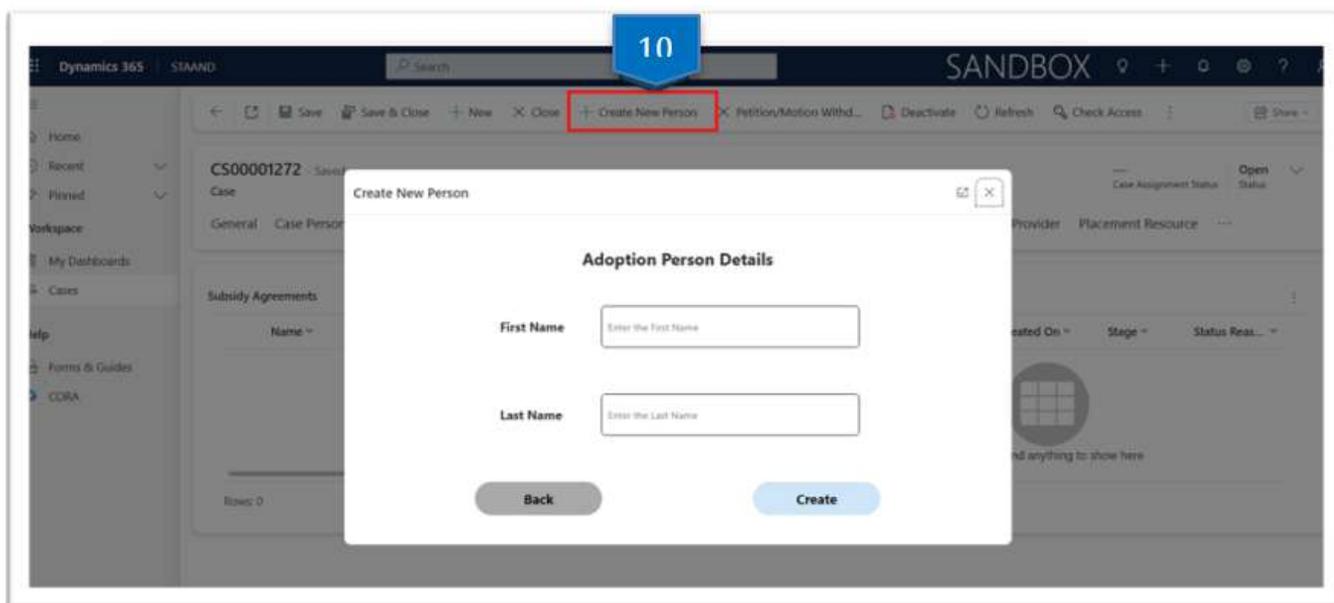
The Subsidy Worker will email the Case Team Social Worker to notify them of the approval status.



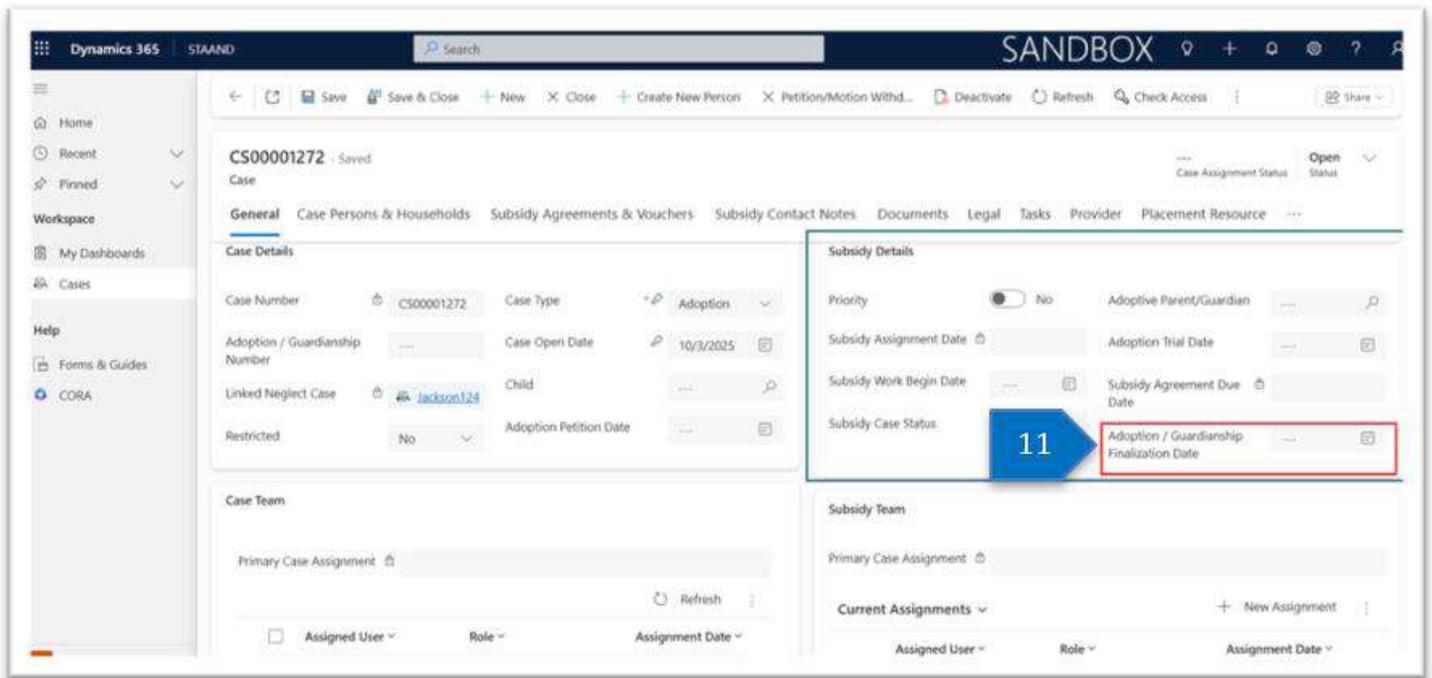
Alert!

Once the adoption is finalized, the final decree is received from the court and uploaded into STAAND by the Case Management Team under the adoption case. The Case Management Team notifies the Subsidy Team of the final decree by email. (This will automate in the future).

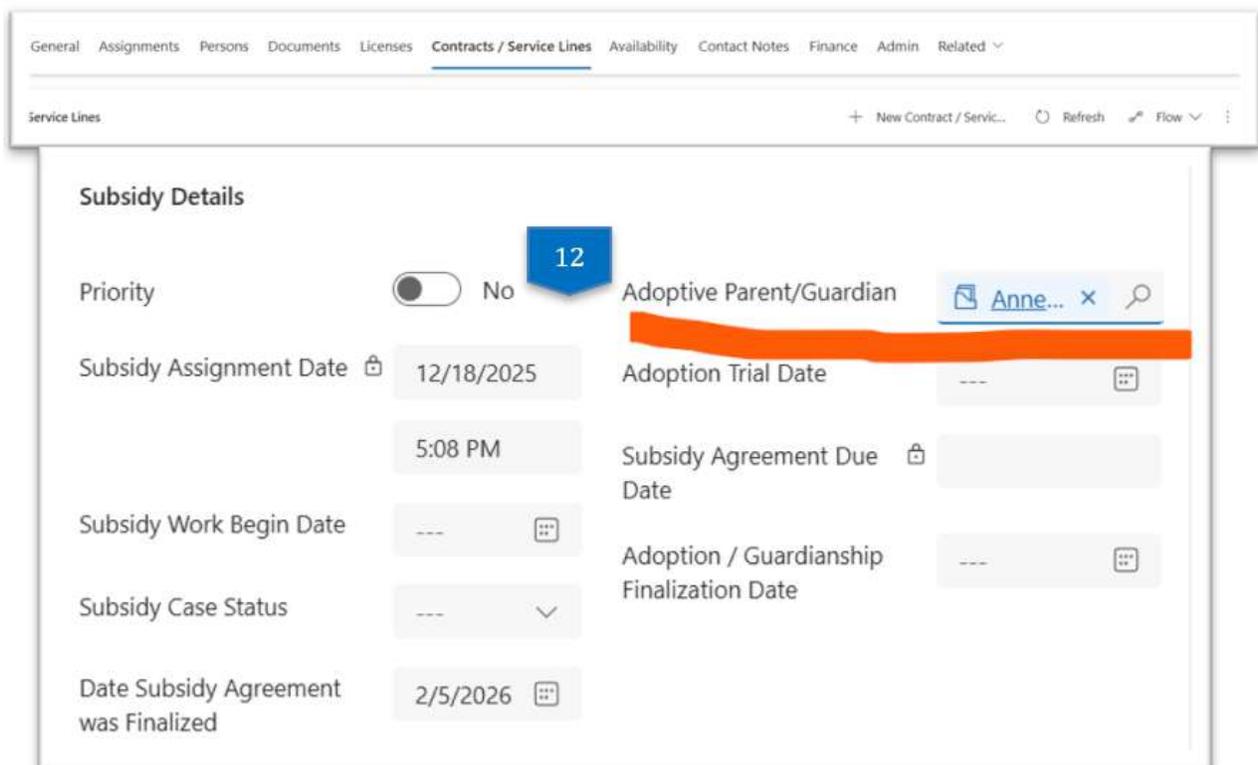
10. Create the Adoption Subsidy Person by entering the Adoption Name and click Create.



11. The Adoption Finalization Date is entered after the creation of the new person.



12. Click the Adopted Parent and create the Subsidy service under Contracts/Service Line.



13. Click + New Contract/Service and enter the new Service Type and Save.

Adoption Subsidy/Foster Care - JOE LEE DAVIS - 2026-02-04 - Saved

Contract / Service Line

Service line prep Subsidy Stage Draft Status

General Admin Related

Provider Annette HOUSE Start Date 2/4/2026

Service Type Adoption Subsidy/Foster Care End Date 5/27/2045

Child Joey Davis Add-on Amount \$0.00

Facility Rate / R & B Amount 38.00 Comments

★ ★ ★

Note:
For Contracted Agencies (NCCF and PSI) the provider **Agency Type** needs to be change to **Both**.

14. Click Submit. After clicking Save, a banner will appear that states “Ask the assigned Social Worker to close case person or case”.

14

Ask the Assigned Social worker on the Neglect Case to close the case person, or case.

Save Submit Save & Close Deactivate Modify Delete Refresh Check Access Change Owner Flow Share

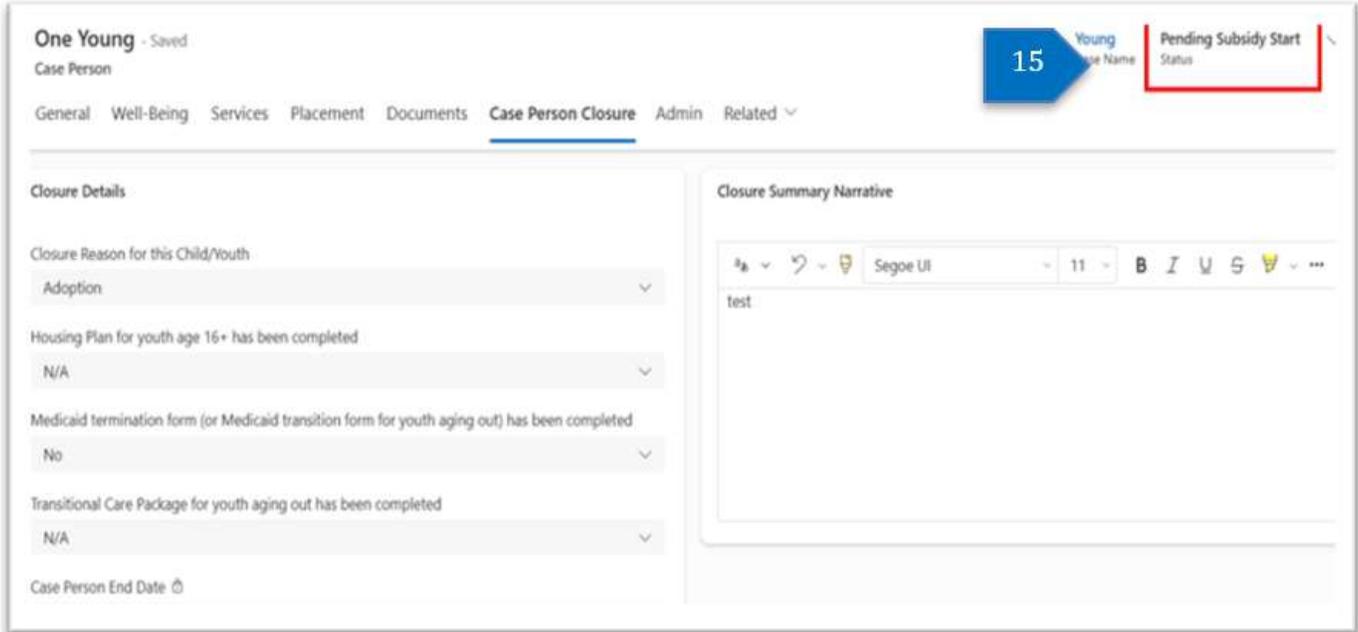
Adoption Subsidy/Foster Care - JOE LEE DAVIS - 2026-02-04 - Saved

Contract / Service Line

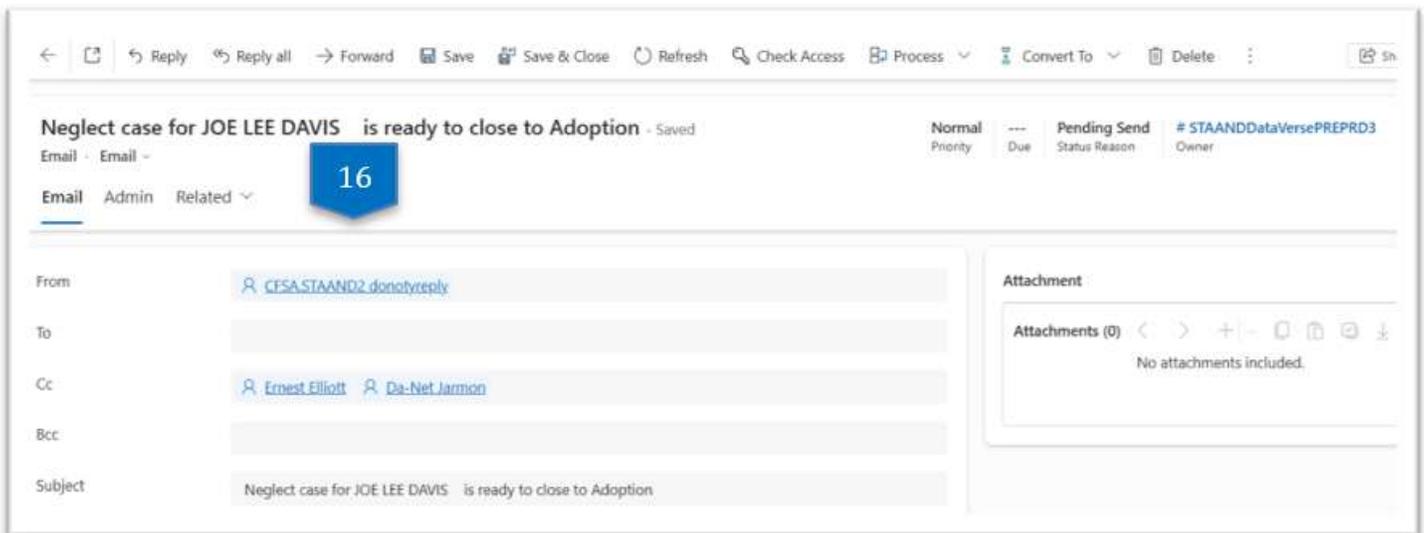
Service line prep Subsidy Stage Draft Status

General Admin Related

15. Click back to the General tab and click on the Neglect case to close out the Case Person. Once you submit for Approval the status will be Pending Subsidy Start.



16. An email notification is sent to the Subsidy Supervisor and Subsidy Worker and cc the on-going worker assigned and supervisor of Neglect Case Closure.



17. Click Adoptive Parent, click the Contract/Service Line tab and complete the Approval for the Subsidy service.

Adoption Subsidy/Foster Care - Onsie Young - 2025-09-23 - Saved

Contract / Service Line

PM Approval Subsidy Stage Approved by Supervisor Status

General Admin Related

Provider Start Date

Service Type End Date

Child Add-on Amount

Facility Rate / R & B Amount Comments

Note:

The End Date will automatically populate based on the **child's birth date**.

18. Upon approval of the Service Line, the system end dates the Case Person Closure, Separation, Placement, Legal Status, and Permanency Goals. (See the screenprints of the End Dates below.)

Rhinus Young - Saved

Case Person

General Well-Being Services Placement Documents Case Person Closure Admin Related

Closure reason for this child/youth

Housing Plan for youth age 16+ has been completed

Medicaid termination form (or Medicaid transition form for youth aging out) has been completed

Transitional Care Package for youth aging out has been completed

Case Person End Date

End Date Reason



Note:

- The Neglect case is end dated on a date before the **Subsidy start date**.
- Once the child is adopted, only the **Adoption Subsidy Worker** will have access to the case; the **Neglect Worker** will no longer have access.

19. a. Placement End Date

First Park - Saved Park Case Name Closed Status

Case Person

General Well-Being Services **Placement** Documents Case Person Closure Admin Related

19a

Add Existing Service L... ** Direct Placement

<input type="checkbox"/> Provider	Start Date	End Date	Type of Home (Provider)	Supplemental End Reason	
<input type="checkbox"/> RS-Noncontracted	9/1/2024	8/1/2025	Foster family	Adoption	

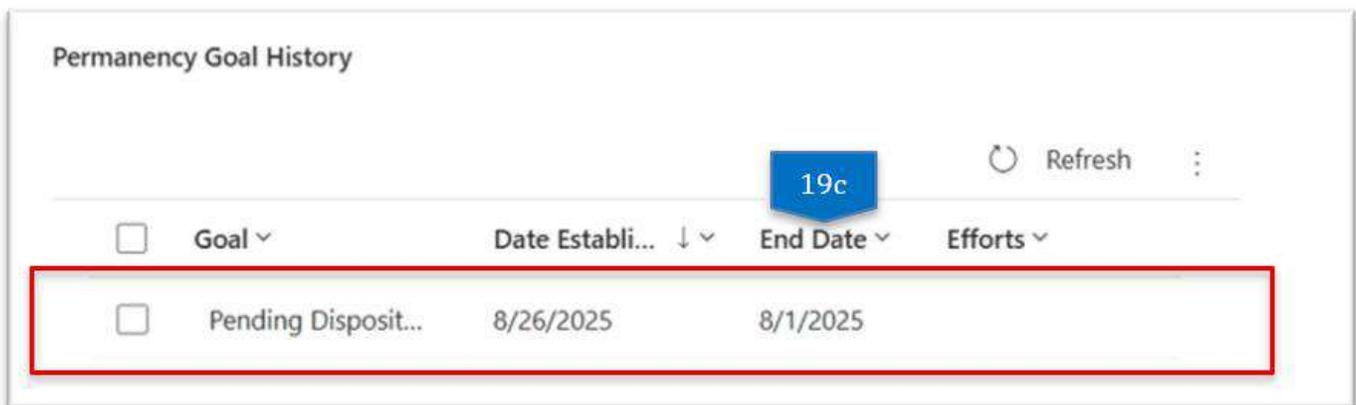
b. Legal Status End Date

Legal Status

19b New Legal Status

<input type="checkbox"/> Legal Status	Start Date	End Date	
<input type="checkbox"/> Pre-Court Custody	8/26/2025	9/1/2024	
<input type="checkbox"/> Shelter Care	9/1/2024	8/1/2025	

c. **Permanency Goal History** End Date.

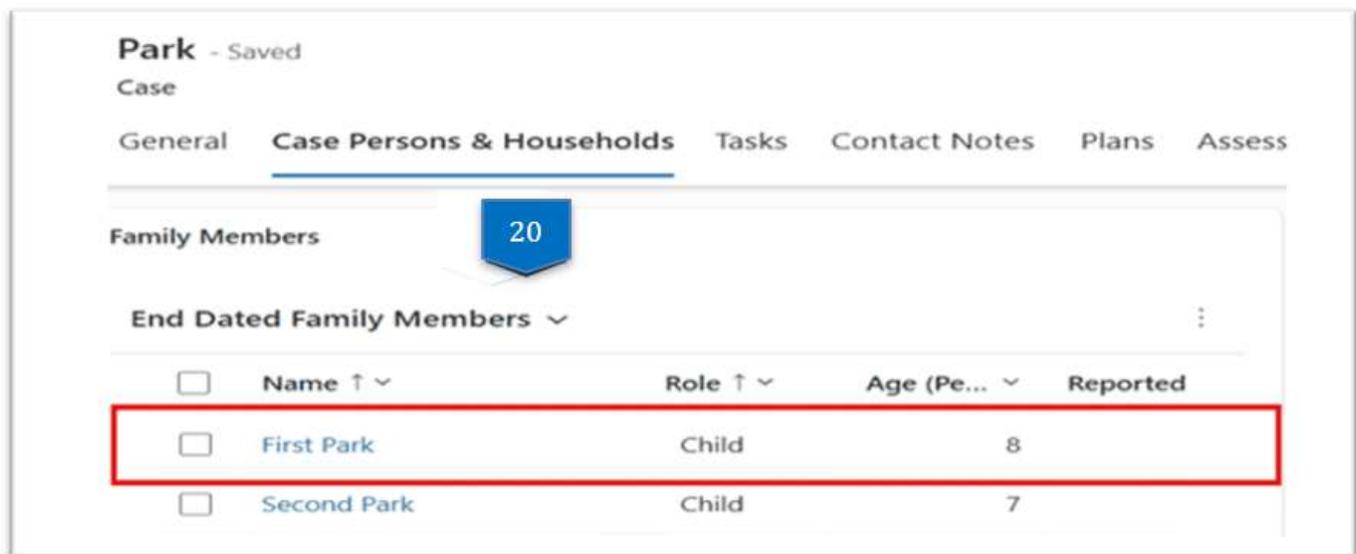


Permanency Goal History

19c Refresh

<input type="checkbox"/>	Goal ▾	Date Establi... ▾	End Date ▾	Efforts ▾
<input type="checkbox"/>	Pending Disposit...	8/26/2025	8/1/2025	

20. The **End Date Family Member** can be found in the **Case Person and Household** tab.



Park - Saved
Case

General Case Persons & Households Tasks Contact Notes Plans Assess

Family Members

20

End Dated Family Members ▾

<input type="checkbox"/>	Name ↑ ▾	Role ↑ ▾	Age (Pe... ▾	Reported
<input type="checkbox"/>	First Park	Child	8	
<input type="checkbox"/>	Second Park	Child	7	

Note:

Once the neglect person record is closed an email notification will be sent to OOH Social Worker and Supervisor also the Subsidy Worker and Supervisor.



Alert! If only one child is in the case and it is closed for adoption, the entire case will also be closed.

Subsidy Guardianship



How To: Manage a Subsidy Guardianship Case

To enter a request for Guardianship, **follow Steps 1 – 9** of the Adoption Process.

10. The **Adoption Finalization Date** is entered after the creation of the new person.

The screenshot shows the Dynamics 365 interface for a case titled "CS00001272 - Saved". The "Subsidy Details" section is highlighted with a blue arrow and a red box around the "Adoption / Guardianship Finalization Date" field. The "Case Details" section shows the following information:

Field	Value
Case Number	CS00001272
Case Type	Adoption
Adoption / Guardianship Number	---
Case Open Date	10/3/2025
Linked Neglect Case	Jackson124
Child	---
Restricted	No
Adoption Petition Date	---

The "Subsidy Details" section shows the following information:

Field	Value
Priority	No
Adoptive Parent/Guardian	---
Subsidy Assignment Date	---
Adoption Trial Date	---
Subsidy Work Begin Date	---
Subsidy Agreement Due Date	---
Subsidy Case Status	---
Adoption / Guardianship Finalization Date	---

11. Click the **Adopted Parent/Guardian** and create the **Subsidy** service under **Contracts/Service Line**.

The screenshot shows the Dynamics 365 interface for "Contracts / Service Lines". The "Subsidy Details" section is highlighted with a blue arrow and a red box around the "Adoptive Parent/Guardian" field. The "Subsidy Details" section shows the following information:

Field	Value
Priority	No
Adoptive Parent/Guardian	Anne...
Subsidy Assignment Date	12/18/2025
Adoption Trial Date	---
Subsidy Work Begin Date	---
Subsidy Agreement Due Date	---
Adoption / Guardianship Finalization Date	---
Date Subsidy Agreement was Finalized	2/5/2026

12. Click + **New Contract/Service** and enter the new **Service Type** and **Save**.

Adoption Subsidy/Foster Care - JOE LEE DAVIS - 2026-02-04 - Saved

Contract / Service Line

Service line prep Subsidy Stage Draft Status

General Admin Related

Provider Annette HOUSE Start Date 2/4/2026

Service Type Adoption Subsidy/Foster Care End Date 5/27/2045

Child Joey Davis Add-on Amount \$0.00

Facility Rate / R & B Amount 38,00 Comments

Note:

For **Contracted Agencies** (NCCF and PSI) the provider **Agency Type** needs to be change to **Both**.

13. Click on **submit** after saving you should get a banner that states “Ask the assigned Social Worker to close case person or case”.

13

Ask the Assigned Social worker on the Neglect Case to close the case person, or case

Save Submit Save & Close Deactivate Modify Delete Refresh Check Access Change Owner Flow Share

Adoption Subsidy/Foster Care - JOE LEE DAVIS - 2026-02-04 - Saved

Contract / Service Line

Service line prep Subsidy Stage Draft Status

General Admin Related

14. Click back to the **General** tab and click on the neglect case to close out the case person. Once you submit for **Approval** the status will be **Pending Subsidy Start**.

15. An email notification is sent to the **Subsidy Supervisor** and **Subsidy Worker** and cc the on-going worker assigned and supervisor of **Neglect Case Closure**.

16. Click **Adoptive Parent**, click the **Contract/Service Line** tab and complete the **Approval** for the **Subsidy** service.



Note:

The **End Date** will automatically populate based on the **child's birth date**.

17. Upon approval of the **Service Line**, the system end dates the **Case Person Closure, Separation, Placement, Legal Status, and Permanency Goals**. (See the screenprints of the End Dates below.)

Rhinus Young - Saved
Case Person

General Well-Being Services Placement Documents **Case Person Closure** Admin Related

Closure Reason for (180-31102) (0001) (0)

Adoption 17

Housing Plan for youth age 16+ has been completed

N/A

Medicaid termination form (or Medicaid transition form for youth aging out) has been completed

Yes

Transitional Care Package for youth aging out has been completed

N/A

Case Person End Date

5/5/2025

End Date Reason *

Case Closure



Note:

- The **Neglect case** is end dated on a date before the **Subsidy start date**.
- Once the child is adopted, only the **Adoption Subsidy Worker** will have access to the case; the **Neglect Worker** will no longer have access.

18. a. Placement End Date

First Park - Saved Park Case Name Closed Status

Case Person

General Well-Being Services **Placement** Documents Case Person Closure Admin Related

18a

Add Existing Service L... Direct Placement

<input type="checkbox"/>	Provider	Start Date	End Date	Type of Home (Provider)	Supplemental End Reason	
<input type="checkbox"/>	RS-Noncontracted	8/1/2024	8/1/2025	Foster Family	Adoption	

b. Legal Status End Date

Legal Status

18b New Legal Status

<input type="checkbox"/>	Legal Status	Start Date	End Date	
<input type="checkbox"/>	Pre-Court Custody	8/26/2025	9/1/2024	
<input type="checkbox"/>	Shelter Care	9/1/2024	8/1/2025	

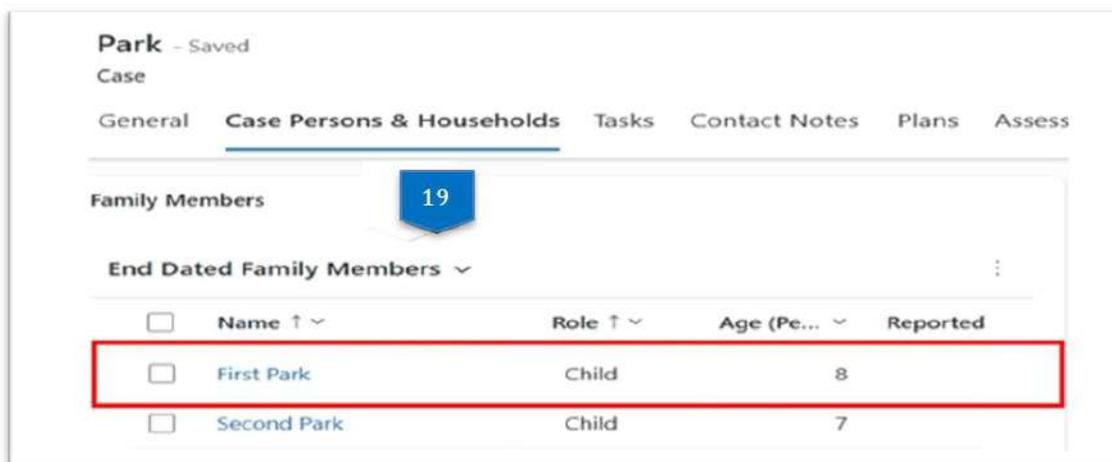
c. Permanency Goal History End Date.

Permanency Goal History

18c Refresh

<input type="checkbox"/>	Goal	Date Establi...	End Date	Efforts
<input type="checkbox"/>	Pending Disposit...	8/26/2025	8/1/2025	

19. The **End Date Family Member** can be found in the **Case Person and Household** tab.



Note:

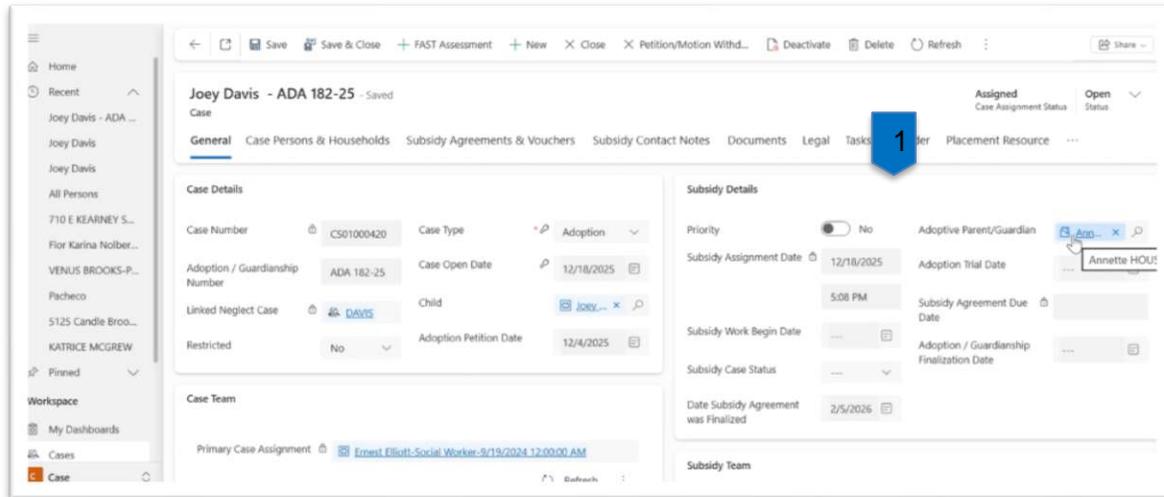
Once the neglect person record is closed an email notification will be sent to OOH Social Worker and Supervisor also the Subsidy Worker and Supervisor.

Alert!

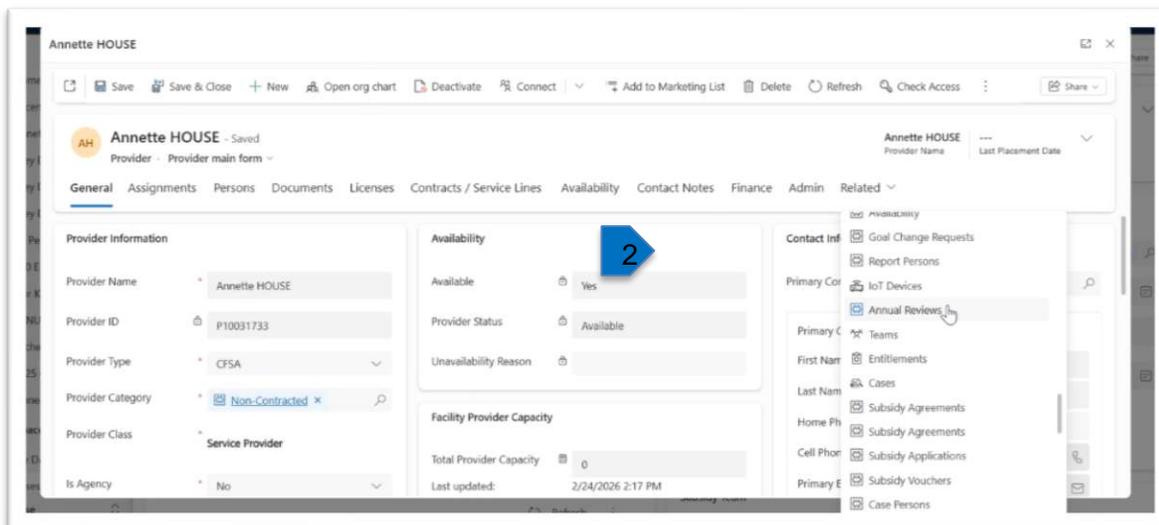
If only one child is in the case and it is closed for adoption, the entire case will also be closed.

Provider Annual Review Process

1. From the **Case** screen, click the **Adoptive Parent** record.



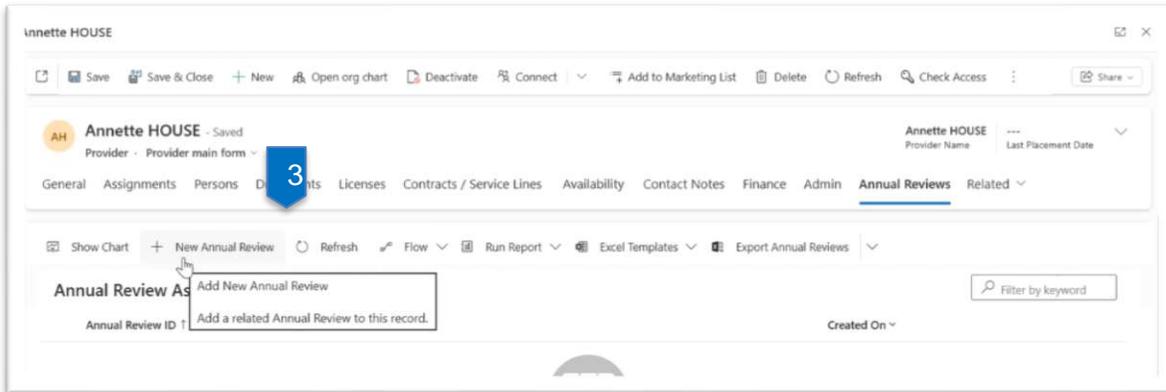
2. Click the **Related** tab and select **Annual Review**.



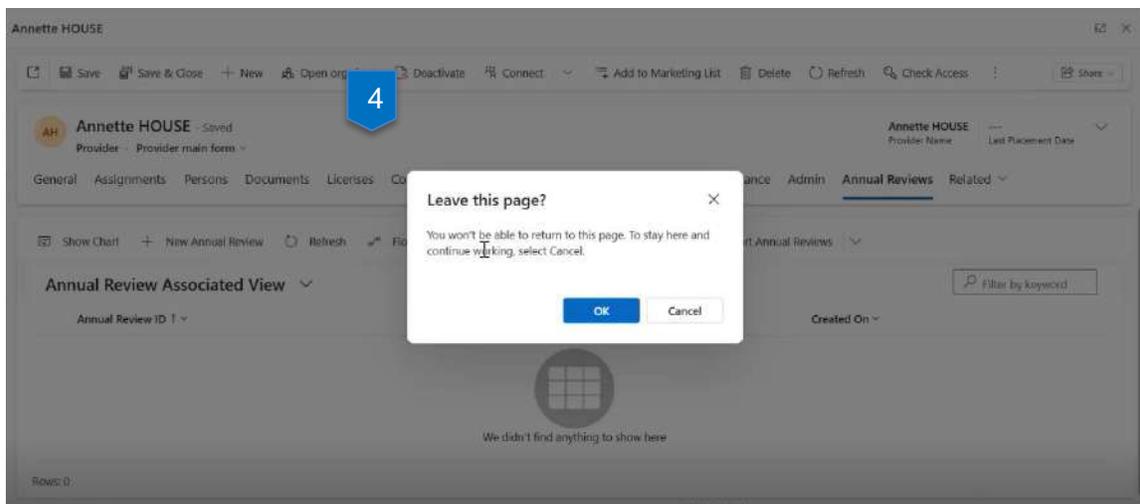
Note:

- Verify the **Primary mail** is correct.
- **End date** is the same as age out date.

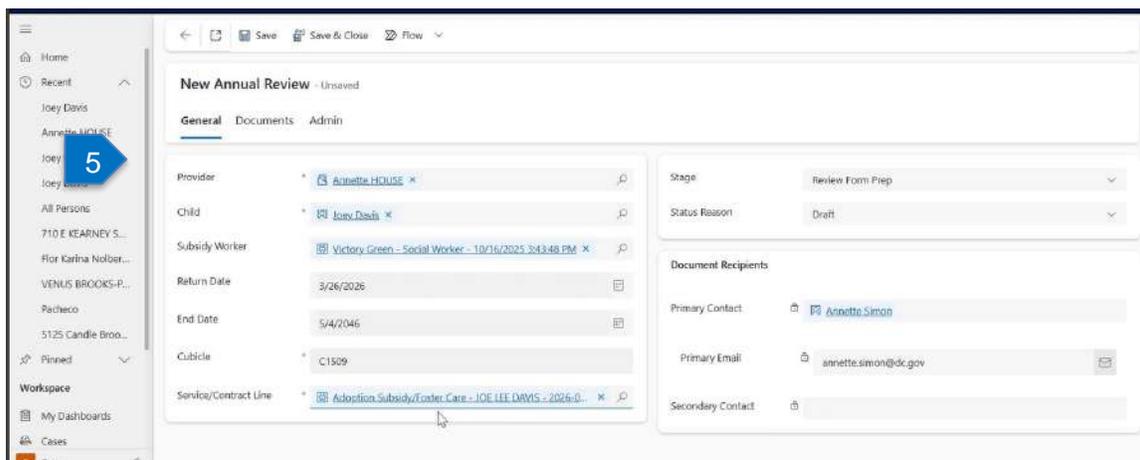
3. Click **+New Annual Review**.



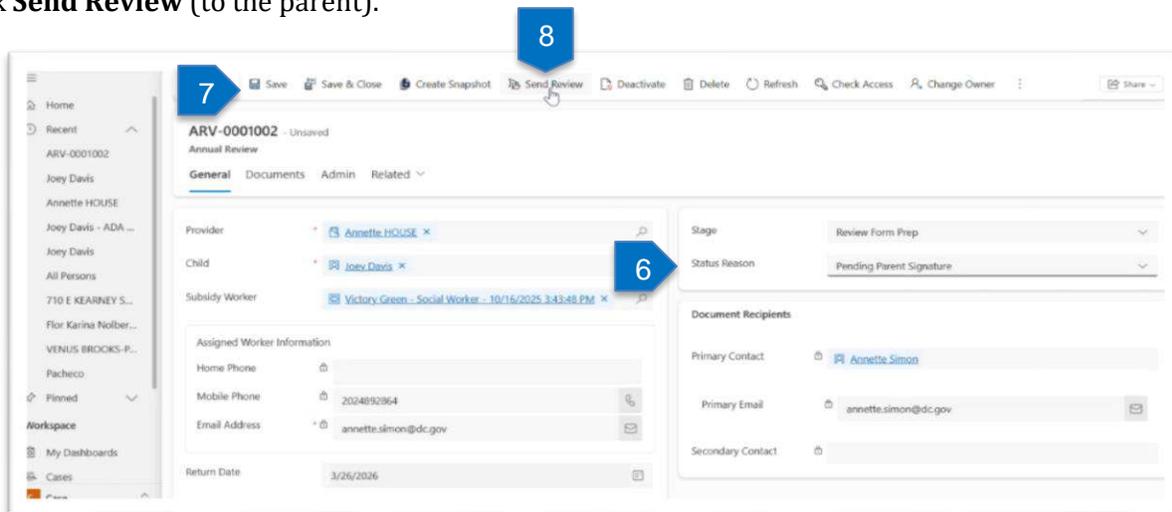
4. Click OK in the pop-up window.



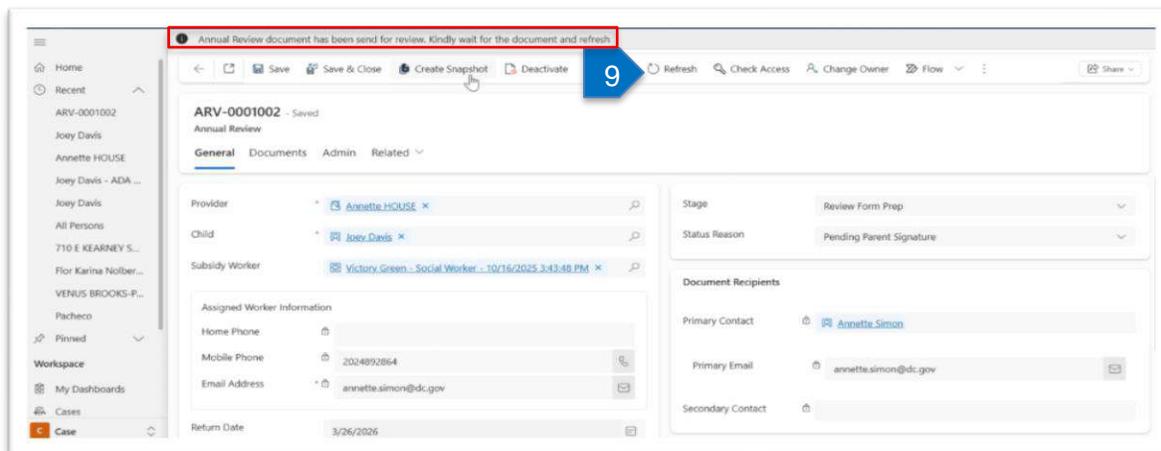
5. Complete the required fields in the **New Annual Review** screen for the adoptive child and **SAVE**.



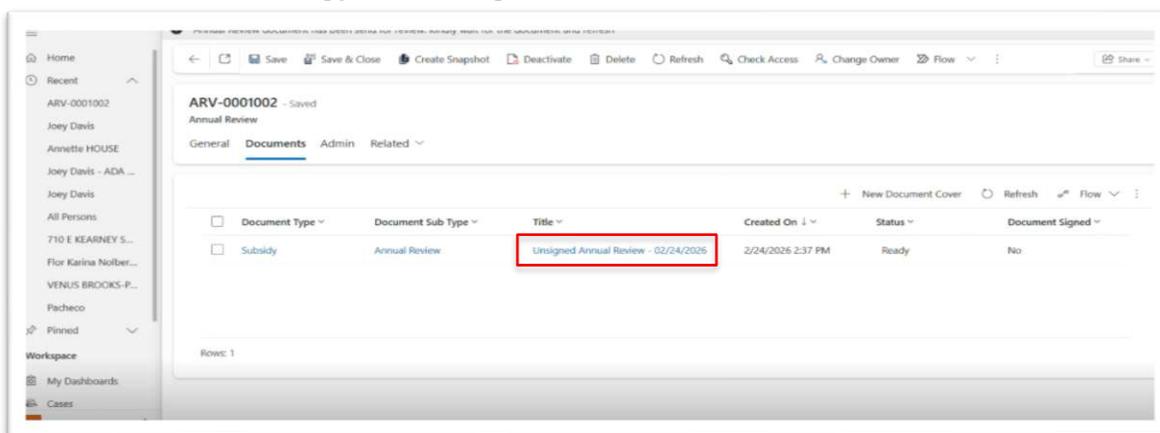
6. Change the **Status Reason** to **Parent Pending Signature**.
7. Click **SAVE**.
8. Click **Send Review** (to the parent).



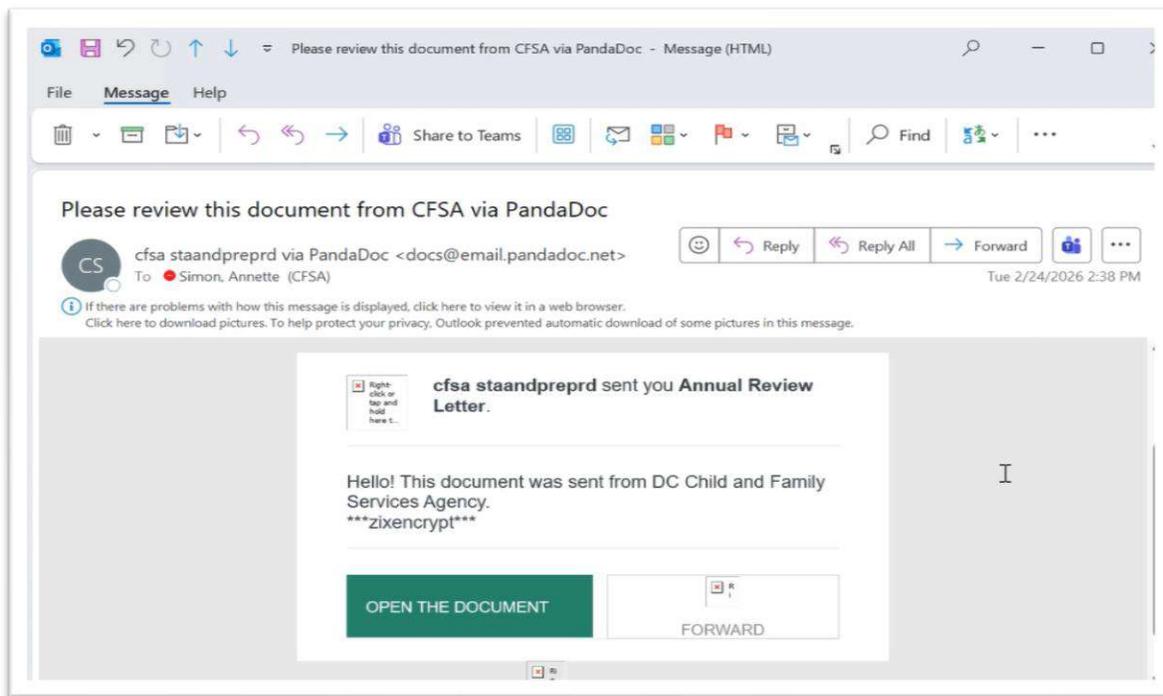
9. Annual review confirmation banner will appear then click **Refresh**.



10. Click **Documents** tab to see a copy of the unsigned document.

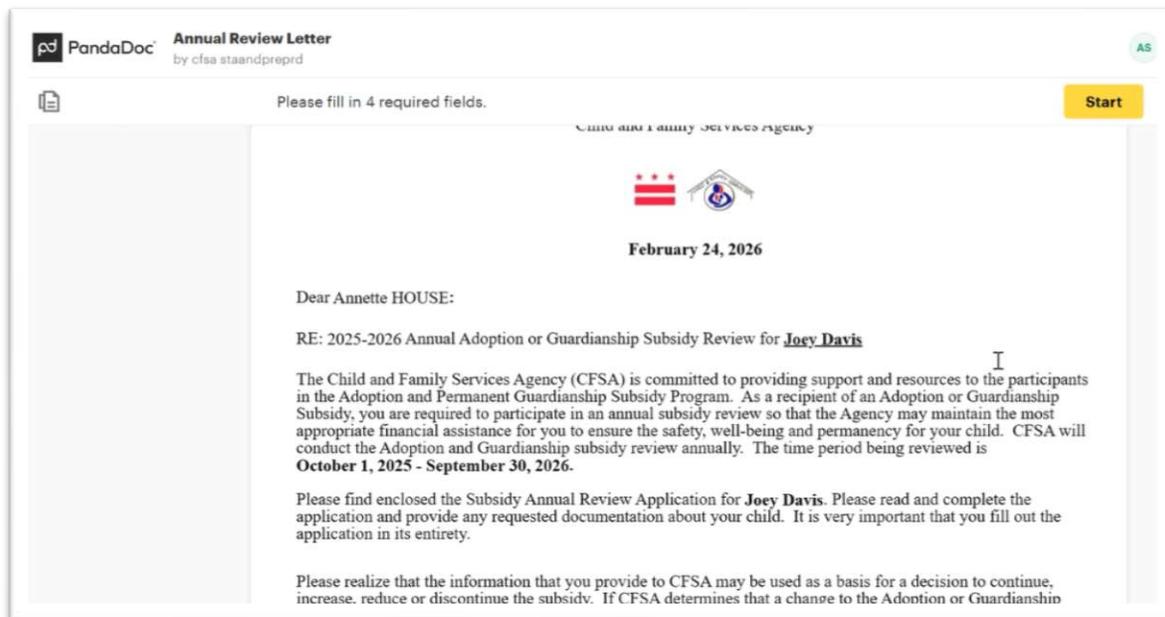


11. The **Parent** will receive an email with the **Annual Review Letter** to review and sign.

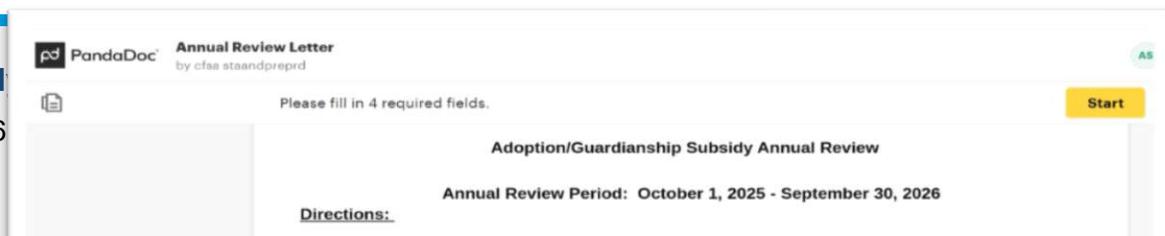


Note: Included in the email is the Panda doc form the **Parent** must complete and sign electronically. If there is more than one **Parent** provider, each **Parent** must sign the form.

Example 1: Email to the Parent(s).



Example 2: Annual Review document directions.



Example 3: Annual Review document payment schedule.

PandaDoc Annual Review Letter
by cfaa staandpreprd

Please fill in 4 required fields. Start

Adoption/Guardianship Subsidy Unit
ATTN: Victory Green, Social Worker
200 I Street, S.E.
Cubicle: C1509
Washington, DC 20003
Or Email to: victory.green@dc.gov

Adoption or Guardianship subsidy payments on behalf of Joey Davis ended or are scheduled to end on May 27, 2025. **Please note Medicaid for the child will also terminate on this date.**

If you have any questions regarding this correspondence or about completing the form, please do not hesitate to contact me at 2022467889.

Thank You,
Victory Green, Subsidy Social Worker
Adoption/Guardianship Subsidy Unit
Business Services Administration

Example 4: Annual Review document with signatures.

PandaDoc Annual Review Letter
by cfaa staandpreprd · All changes have been saved

2 fields required. Finish

Next

Annette Simon
Signature (Parent 1)
Annette Simon

2026-02-24
Date

Signature
Signature (Parent 2)

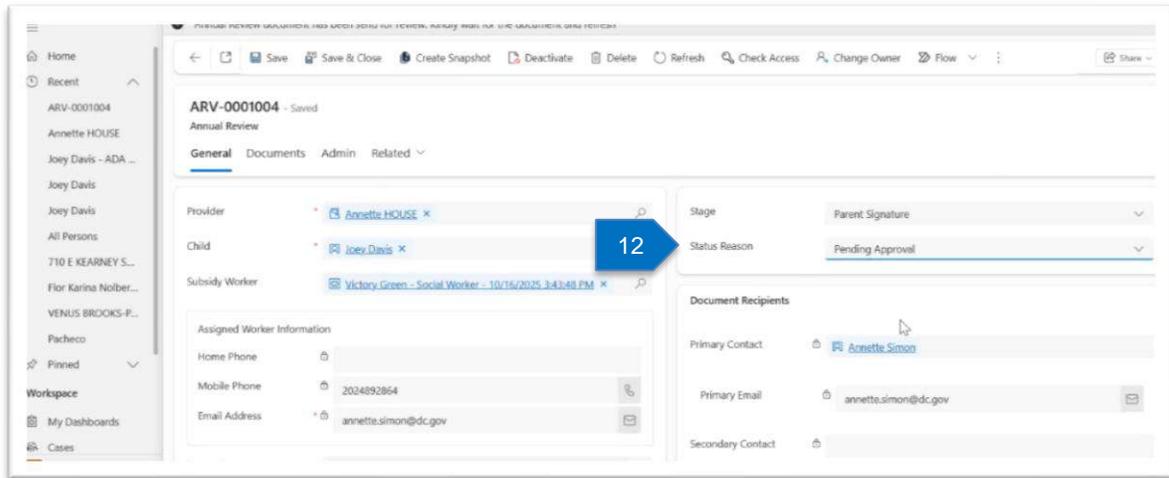
Select date
Date

Example 5: The Annual Review document has been signed and is complete.

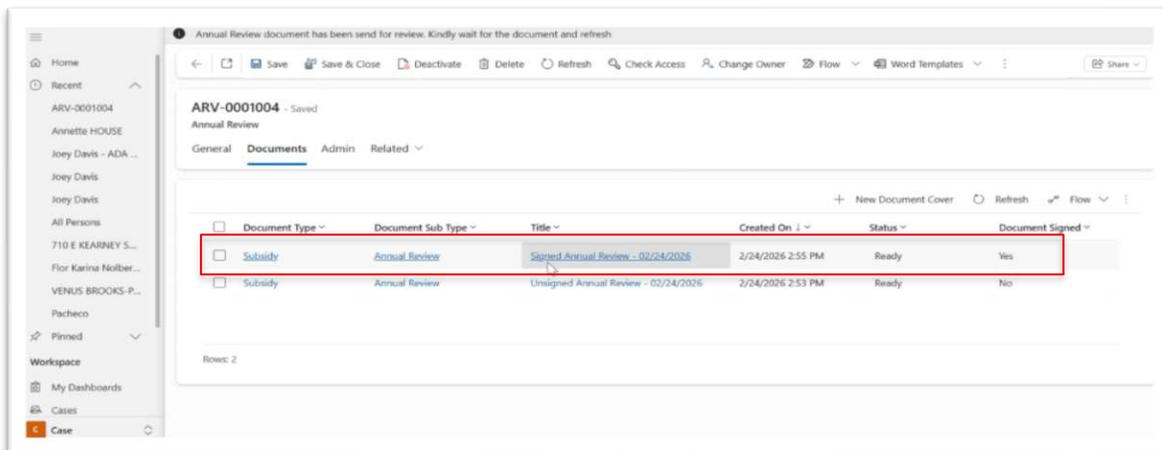
12. The Subsidy Worker changes the **Status Reason** to **Pending Approval** and click **Save**.

Note:

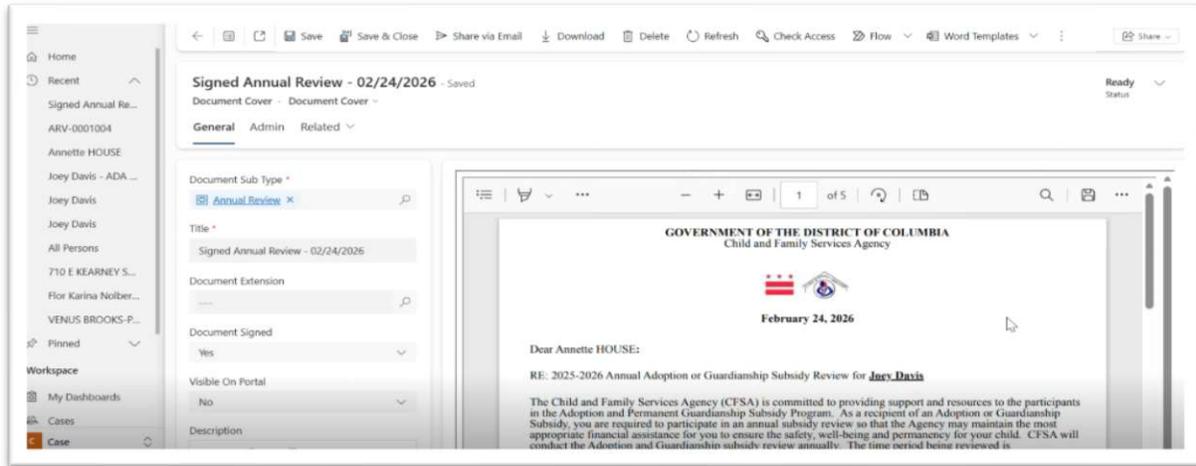
There is no formal approval process for this step, only the action of changing the **Status Reason** to **Pending Approval**.



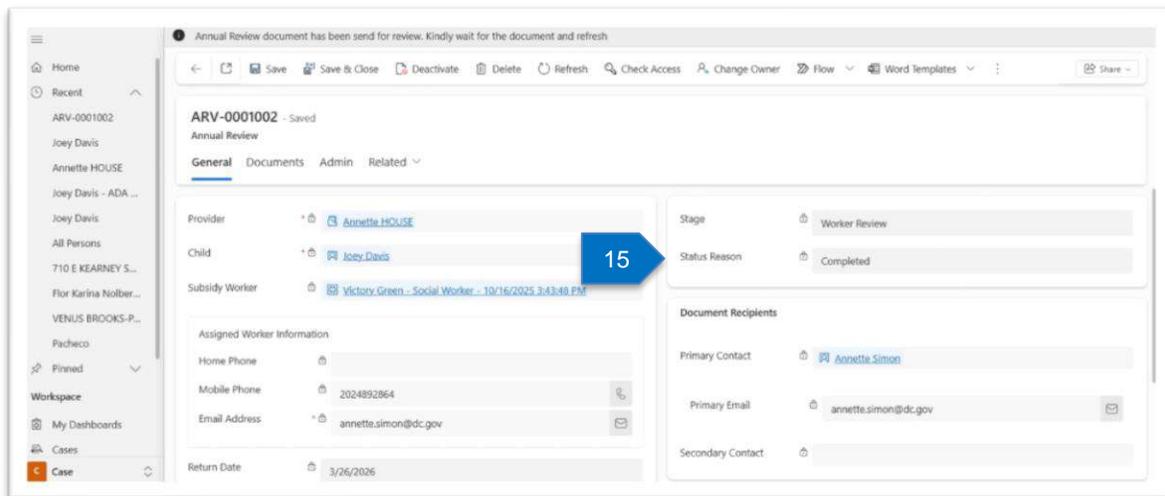
13. Click Documents tab to verify the Annual Review document has been uploaded



14. Open and review the document to ensure the form has been completed and the **Parent** has signed the document.



15. The **Subsidy Worker** changes the **Status Reason** to **Completed** and click **Save**.



Note:

- Once the Subsidy Worker changes the **Status Reason to Complete**, it is locked and **SAVED**.
- A final copy will be sent to the **Provider/Adoptive Parent**.
- The **Provider/Adoptive Parent** receives a copy of the signed Annual Review document.