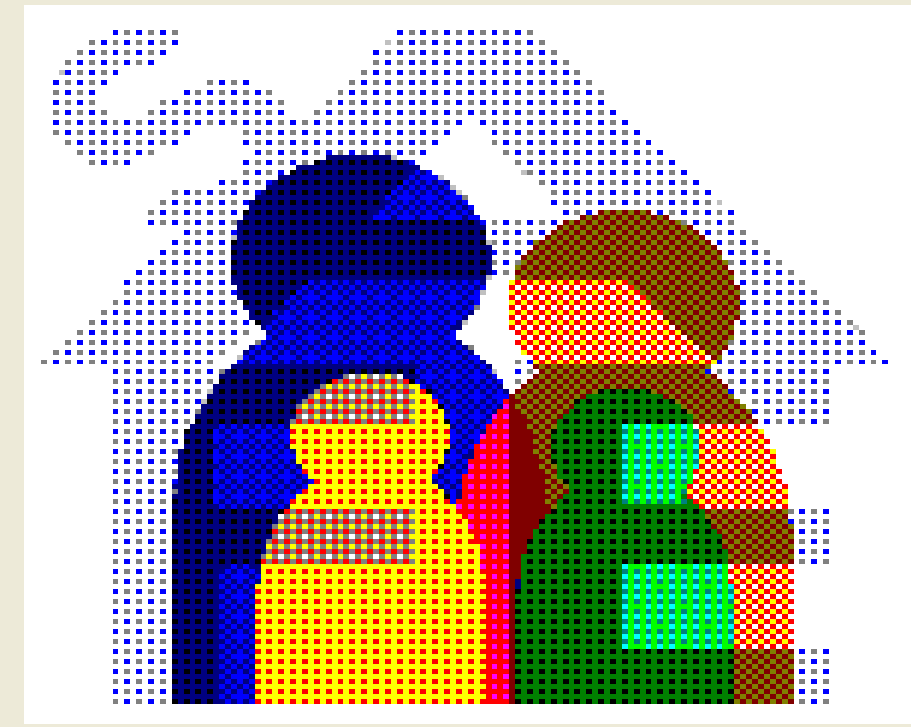
SAFE Eligibility Worker Guide



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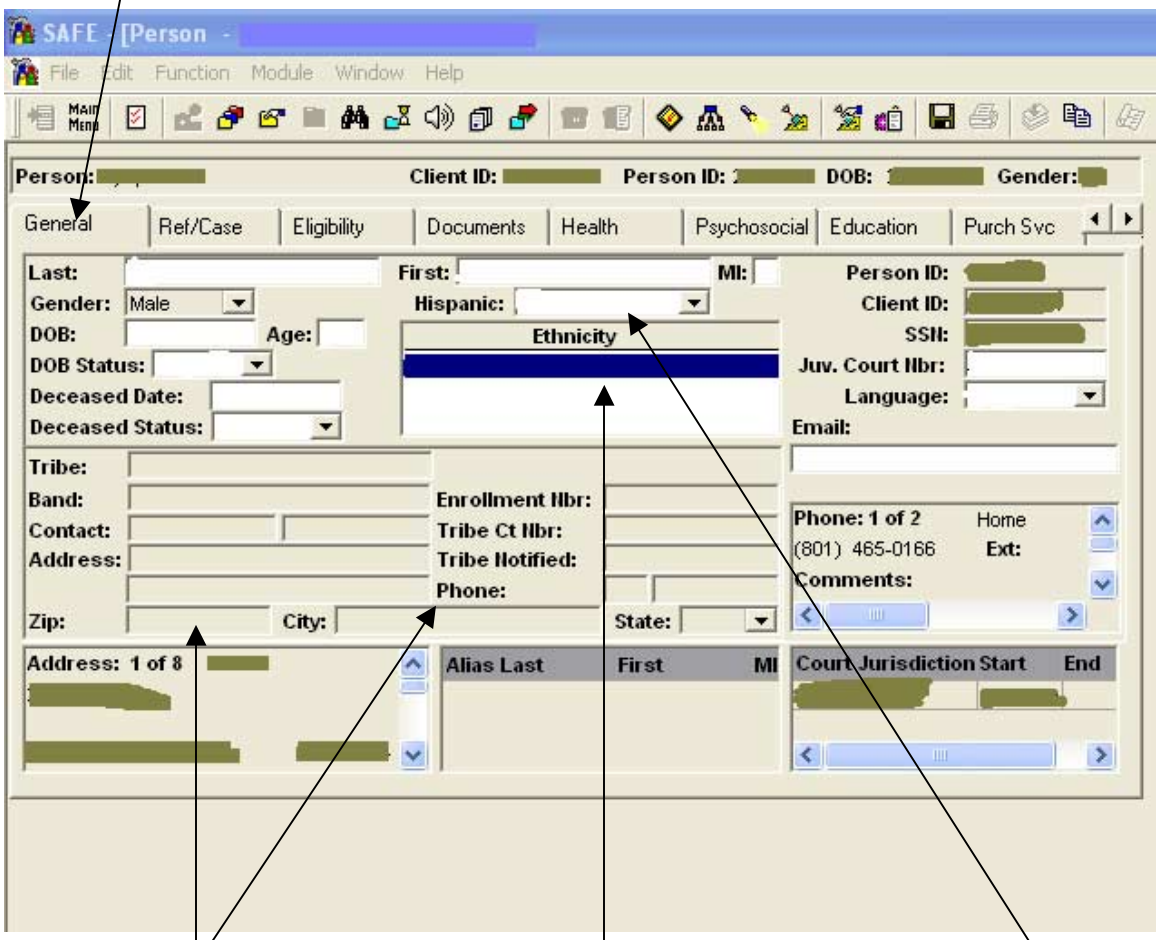
SAFE Person Screen
Name/Address
Ethnicity/Hispanic/Tribal Information

General Tab.



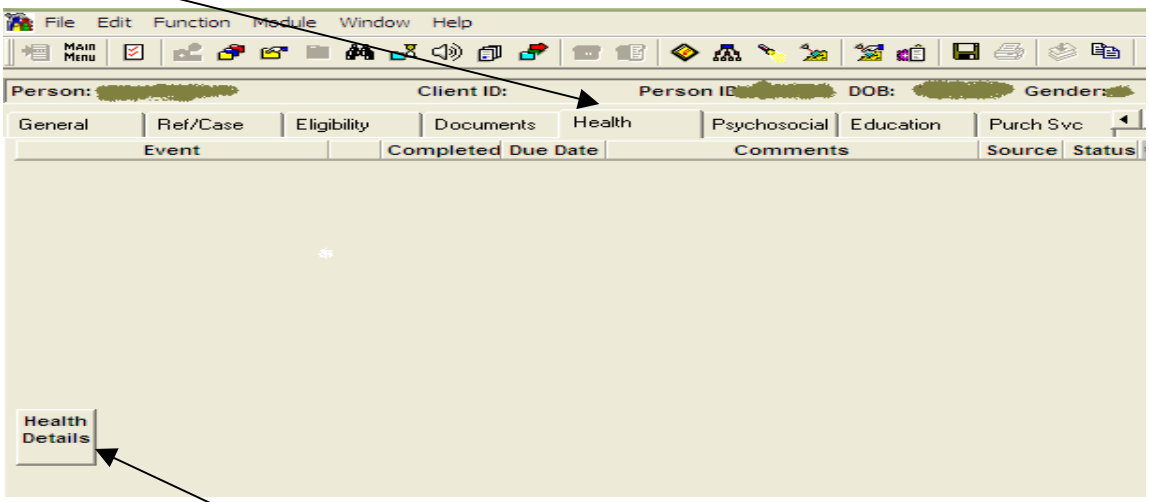
Tribe Information.

Ethnicity
American Indian/Alaska Native
Asian
Black
Cannot Determine
Pacific Islander
Unknown
White

Hispanic
Yes
No
Cannot Determine
Unknown

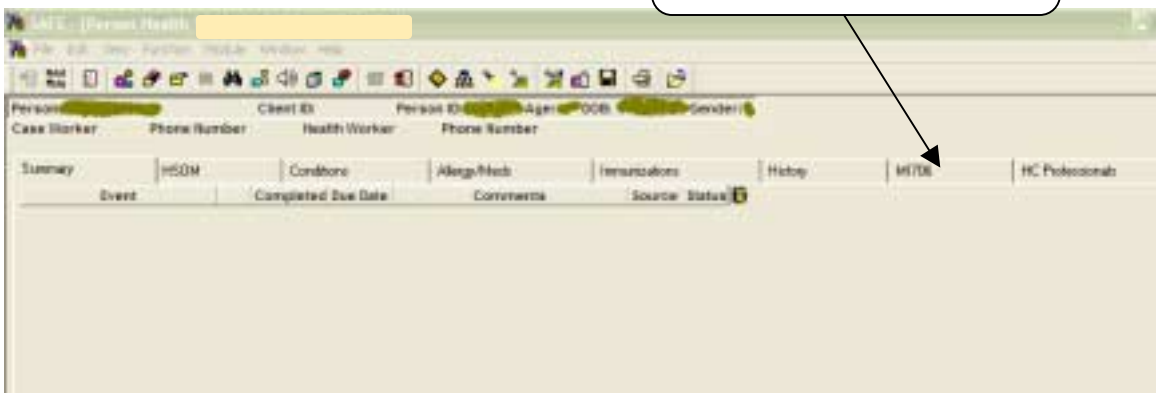
Adding a MI706's to SAFE Person Screen

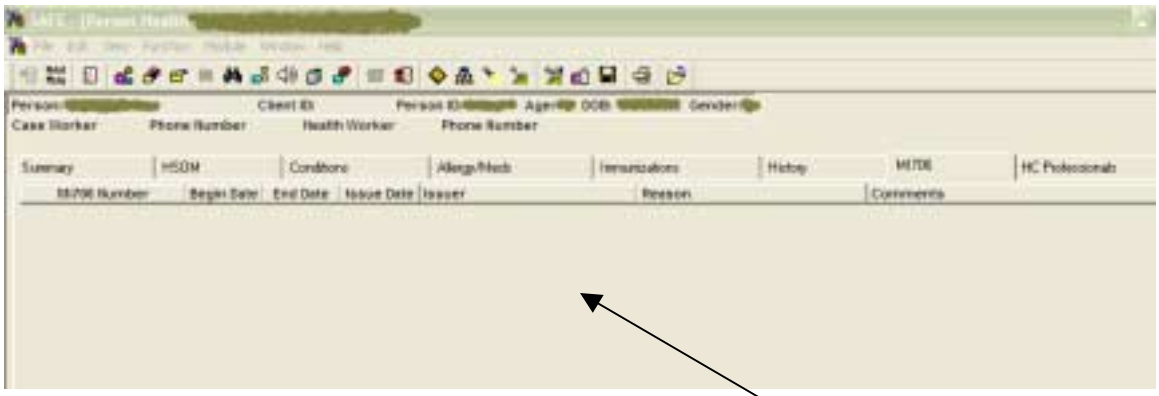
Click on the **"Health Tab".**



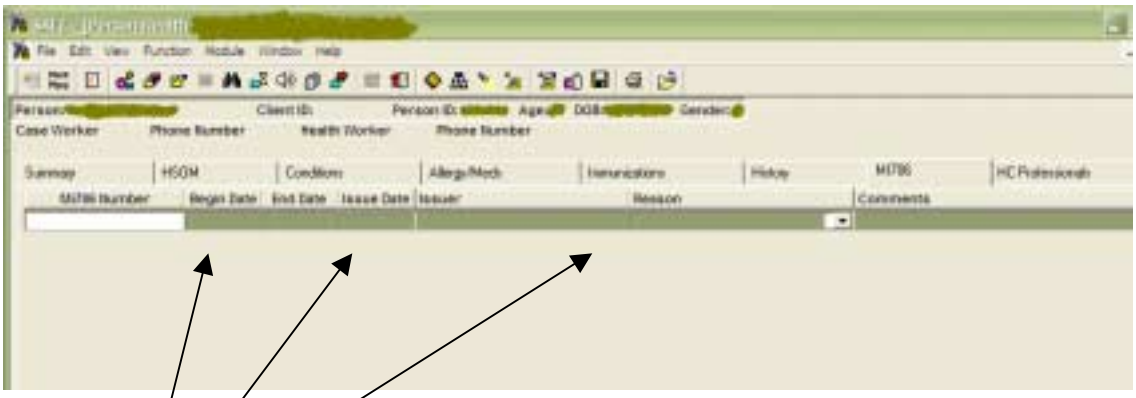
Click the **"health details"** button.

Click on the **"MI706 tab".**





Right click.
Select **"Add".**

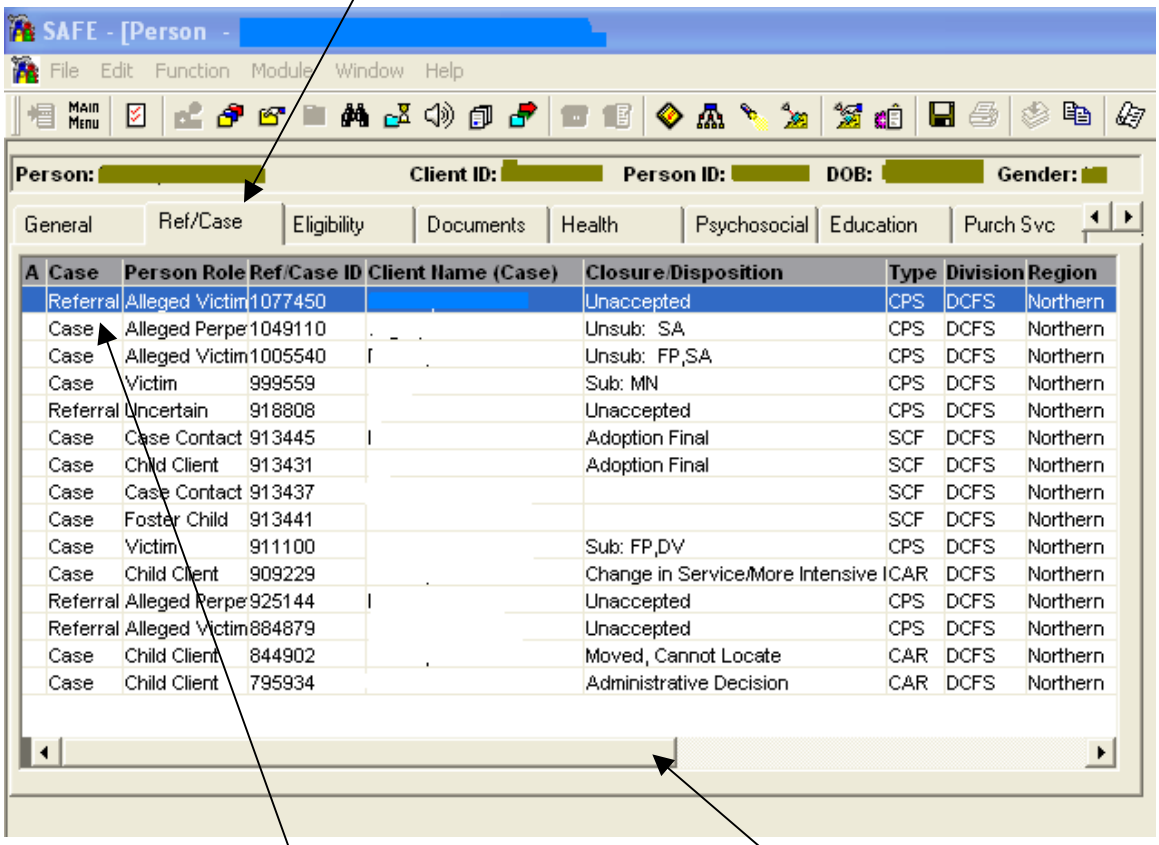


Add the information to appropriate fields.
Save!

****When extending an MI-706 make sure to update the end date field in SAFE.**

SAFE Person Screen
Resource for locating information about the Removal Home

Ref/Case Tab on the Person Screen
This tab has the SAFE case history for the client.

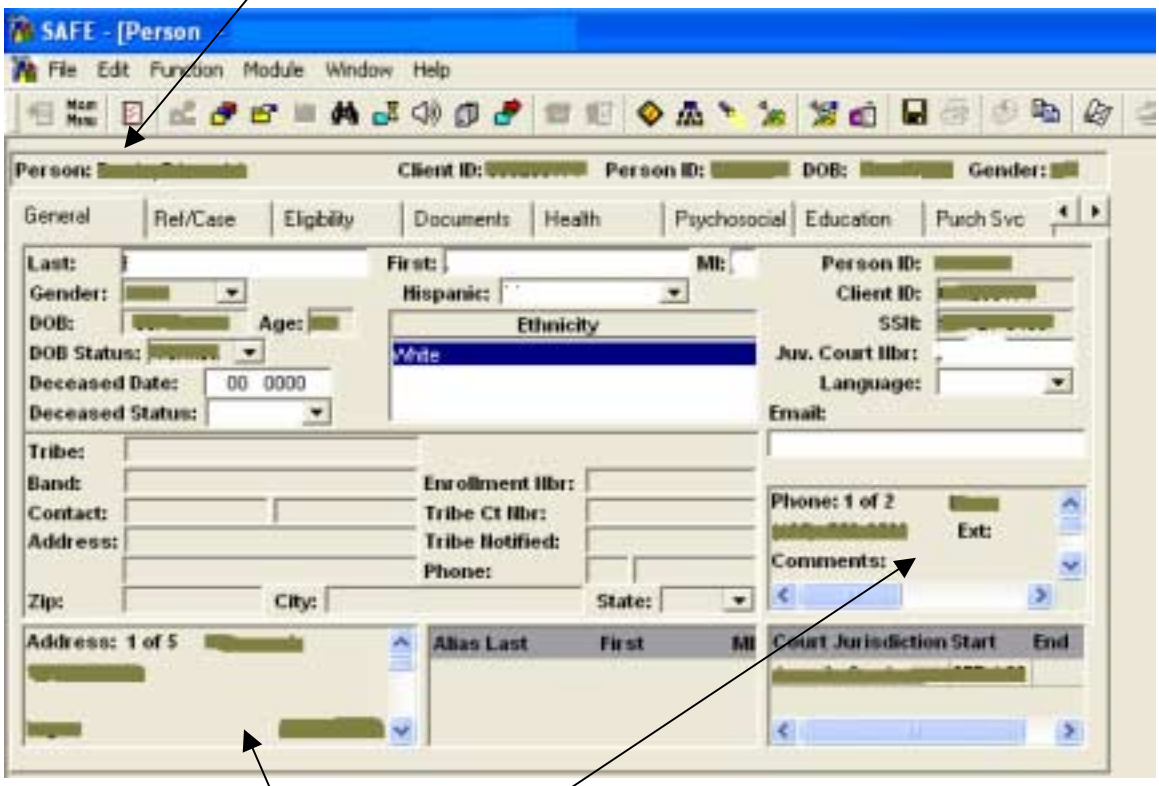


A	Case	Person Role	Ref/Case ID	Client Name (Case)	Closure/Disposition	Type	Division	Region
	Referral	Alleged Victim	1077450		Unaccepted	CPS	DCFS	Northern
	Case	Alleged Perpe	1049110		Unsub: SA	CPS	DCFS	Northern
	Case	Alleged Victim	1005540		Unsub: FP,SA	CPS	DCFS	Northern
	Case	Victim	999559		Sub: MN	CPS	DCFS	Northern
	Referral	Uncertain	918808		Unaccepted	CPS	DCFS	Northern
	Case	Case Contact	913445		Adoption Final	SCF	DCFS	Northern
	Case	Child Client	913431		Adoption Final	SCF	DCFS	Northern
	Case	Case Contact	913437			SCF	DCFS	Northern
	Case	Foster Child	913441			SCF	DCFS	Northern
	Case	Victim	911100		Sub: FP,DV	CPS	DCFS	Northern
	Case	Child Client	909229		Change in Service/More Intensive I	CAR	DCFS	Northern
	Referral	Alleged Perpe	925144		Unaccepted	CPS	DCFS	Northern
	Referral	Alleged Victim	884879		Unaccepted	CPS	DCFS	Northern
	Case	Child Client	844902		Moved, Cannot Locate	CAR	DCFS	Northern
	Case	Child Client	795934		Administrative Decision	CAR	DCFS	Northern

Previous case information can be accessed by "**Double Clicking"** on the case, or by "**Right Clicking**" and selecting **"Go to Case".**

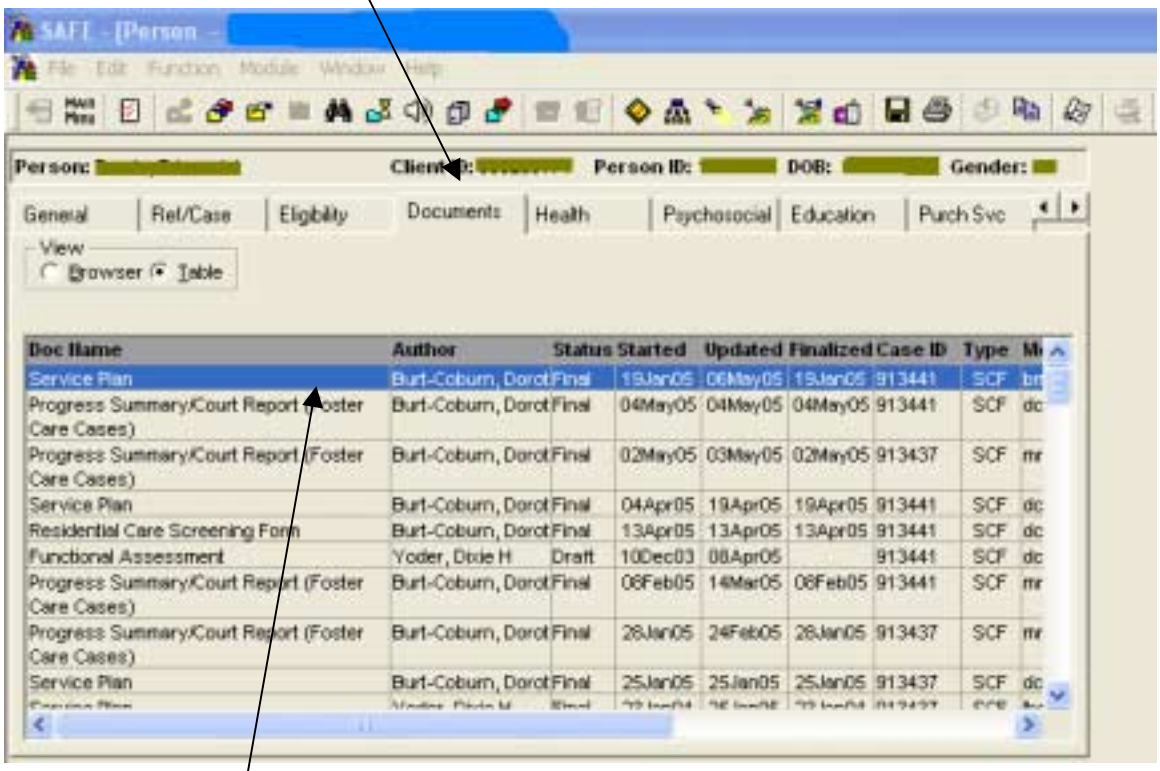
Use the scroll bar to view other columns.

Family information located on the **"General Tab"** of the Person screen.



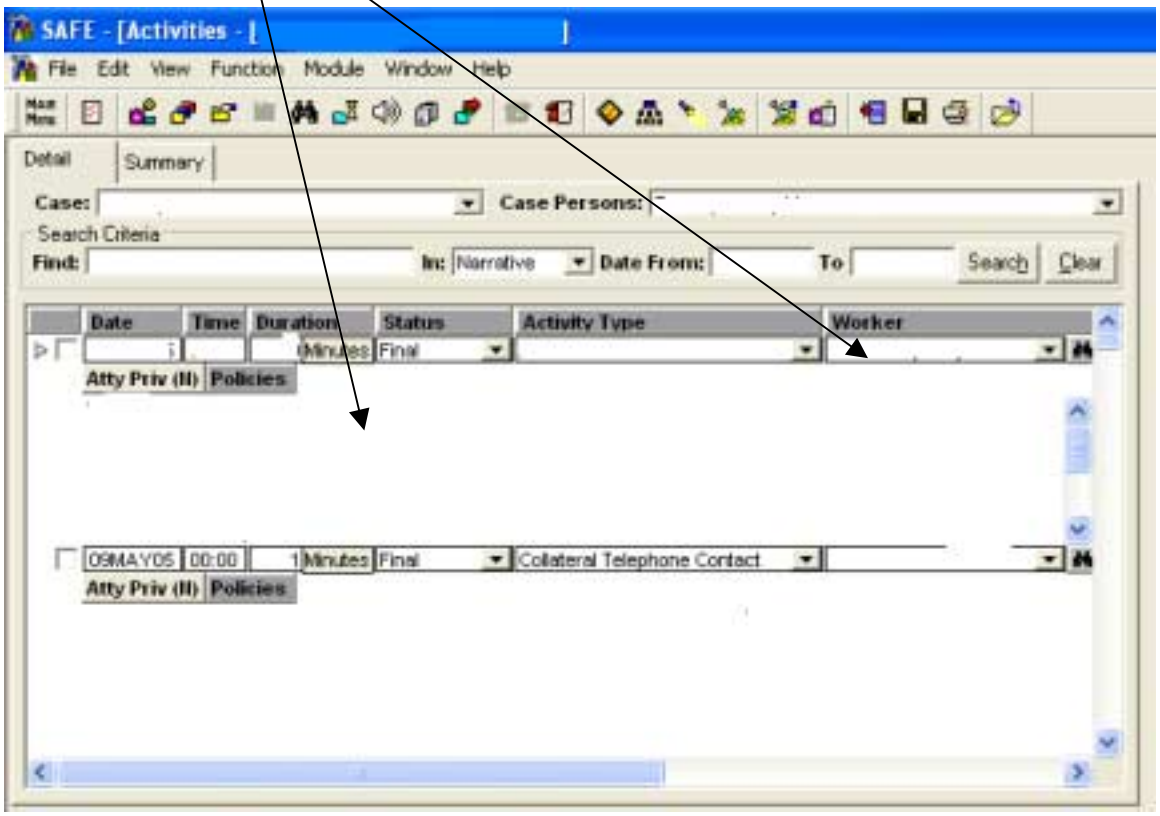
Address and phone number history for client.

Case and family information located on the **"Document Tab"** of the person screen.



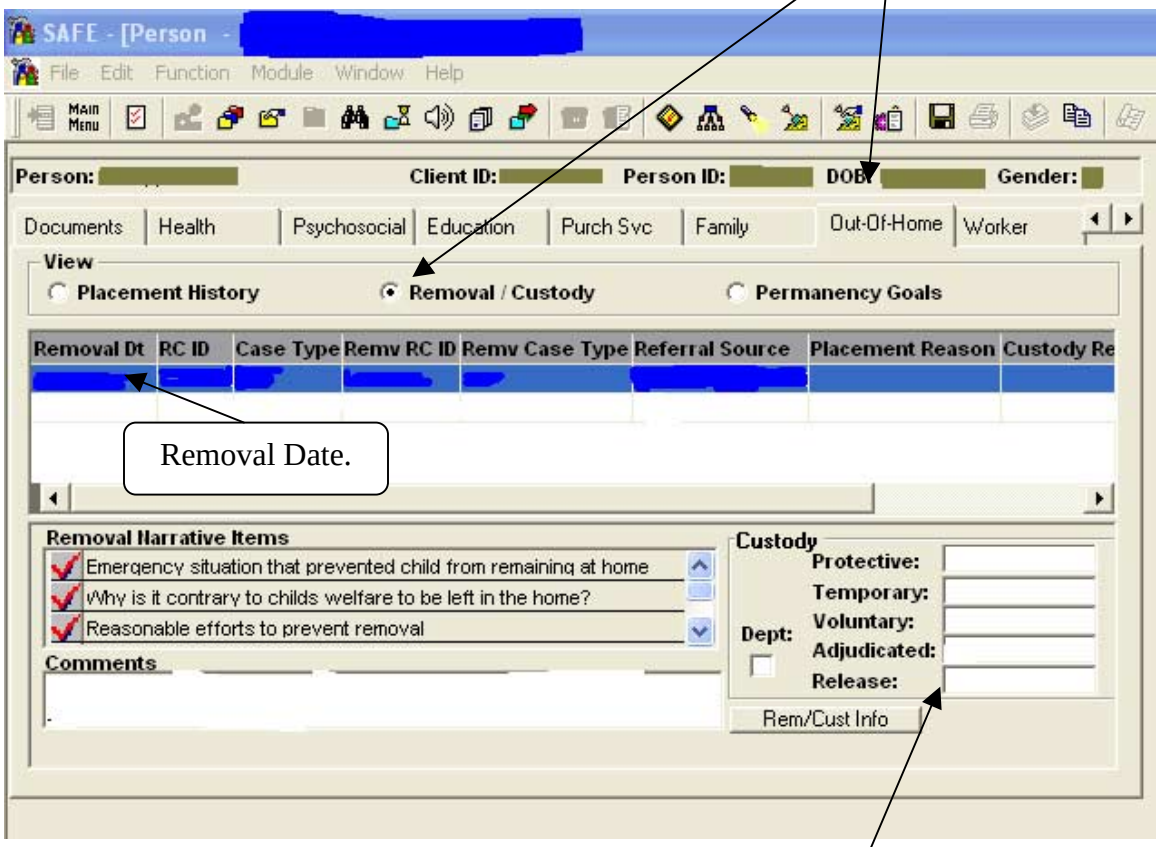
"Right Click".
Select **"Document View".**

Case Activity Logs can contain valuable information. You may want to contact a particular worker for more information regarding an activity log.



SAFE Removal/Custody Information
Person Screen

Out of Home Tab
located on the person screen.
Removal/Custody radial button.

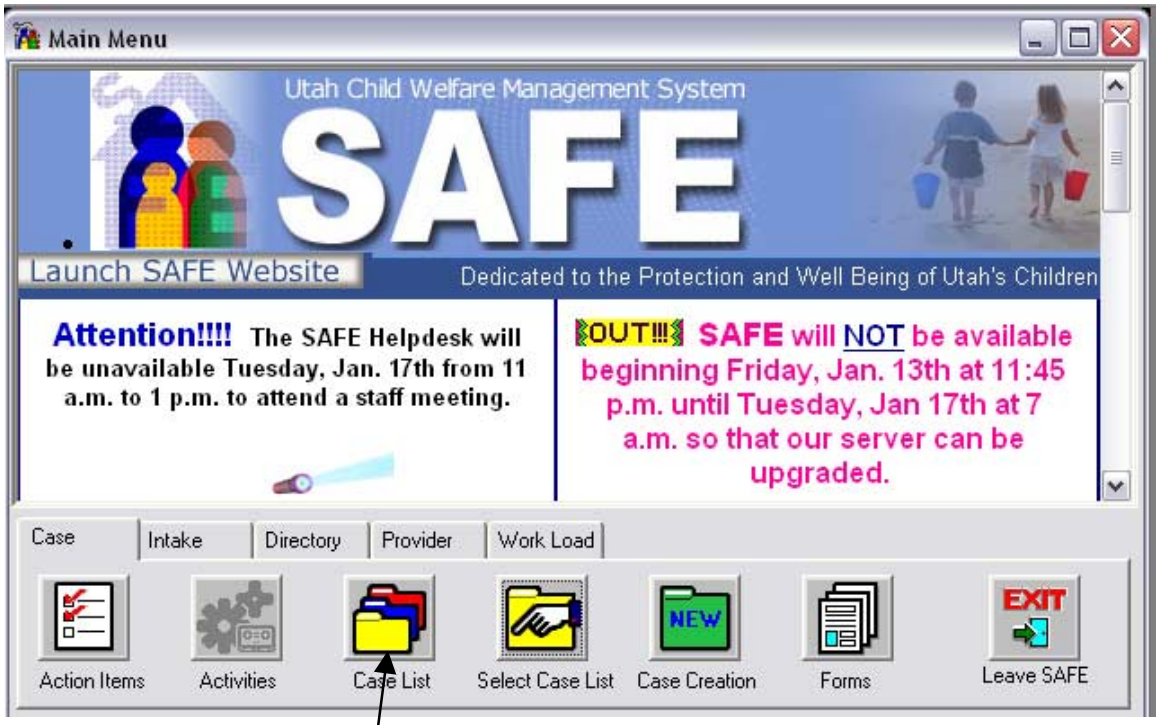


Removal Date.

Custody types and dates.

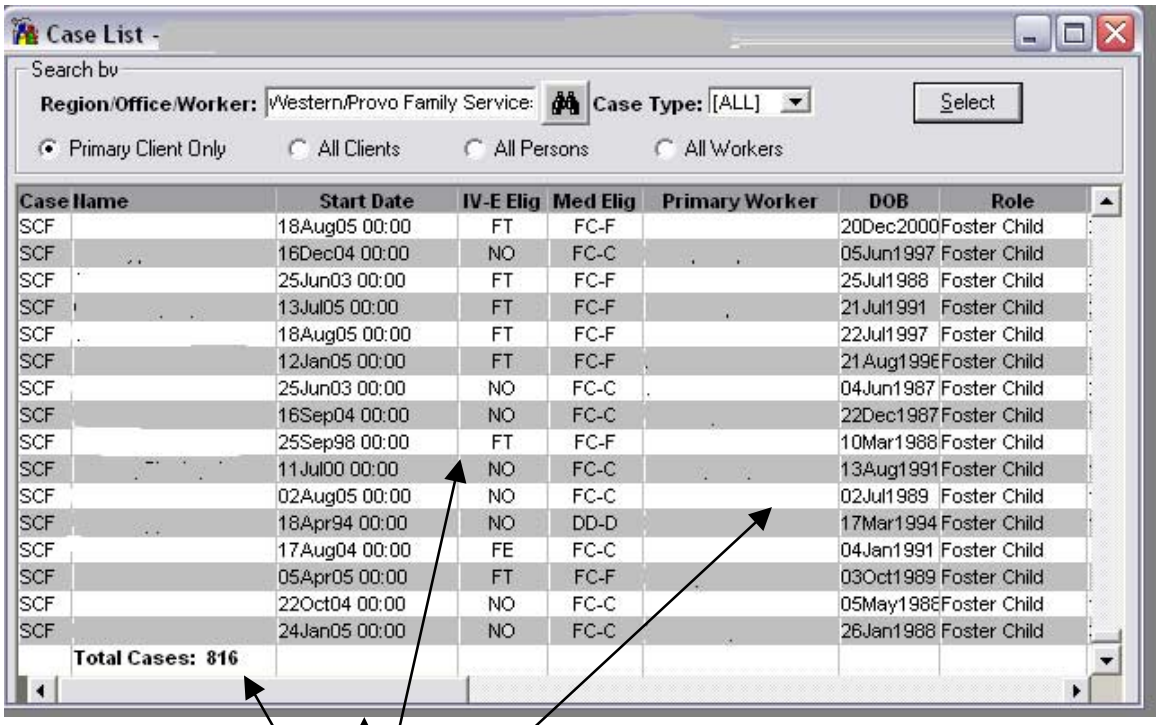
****This screen contains the information from the SAFE removal wizard. Custody types and dates can help determine the eligibility month.**

SAFE Case Lists



Select **"Case List"** from the SAFE Main Menu to display your assigned case list.

Case List Display



Case	Name	Start Date	IV-E Elig	Med Elig	Primary Worker	DOB	Role
SCF		18Aug05 00:00	FT	FC-F		20Dec2000	Foster Child
SCF		16Dec04 00:00	NO	FC-C		05Jun1997	Foster Child
SCF		25Jun03 00:00	FT	FC-F		25Jul1988	Foster Child
SCF		13Jul05 00:00	FT	FC-F		21Jul1991	Foster Child
SCF		18Aug05 00:00	FT	FC-F		22Jul1997	Foster Child
SCF		12Jan05 00:00	FT	FC-F		21Aug1996	Foster Child
SCF		25Jun03 00:00	NO	FC-C		04Jun1987	Foster Child
SCF		16Sep04 00:00	NO	FC-C		22Dec1987	Foster Child
SCF		25Sep98 00:00	FT	FC-F		10Mar1988	Foster Child
SCF		11Jul00 00:00	NO	FC-C		13Aug1991	Foster Child
SCF		02Aug05 00:00	NO	FC-C		02Jul1989	Foster Child
SCF		18Apr94 00:00	NO	DD-D		17Mar1994	Foster Child
SCF		17Aug04 00:00	FE	FC-C		04Jan1991	Foster Child
SCF		05Apr05 00:00	FT	FC-F		03Oct1989	Foster Child
SCF		22Oct04 00:00	NO	FC-C		05May1988	Foster Child
SCF		24Jan05 00:00	NO	FC-C		26Jan1988	Foster Child
	Total Cases: 816						

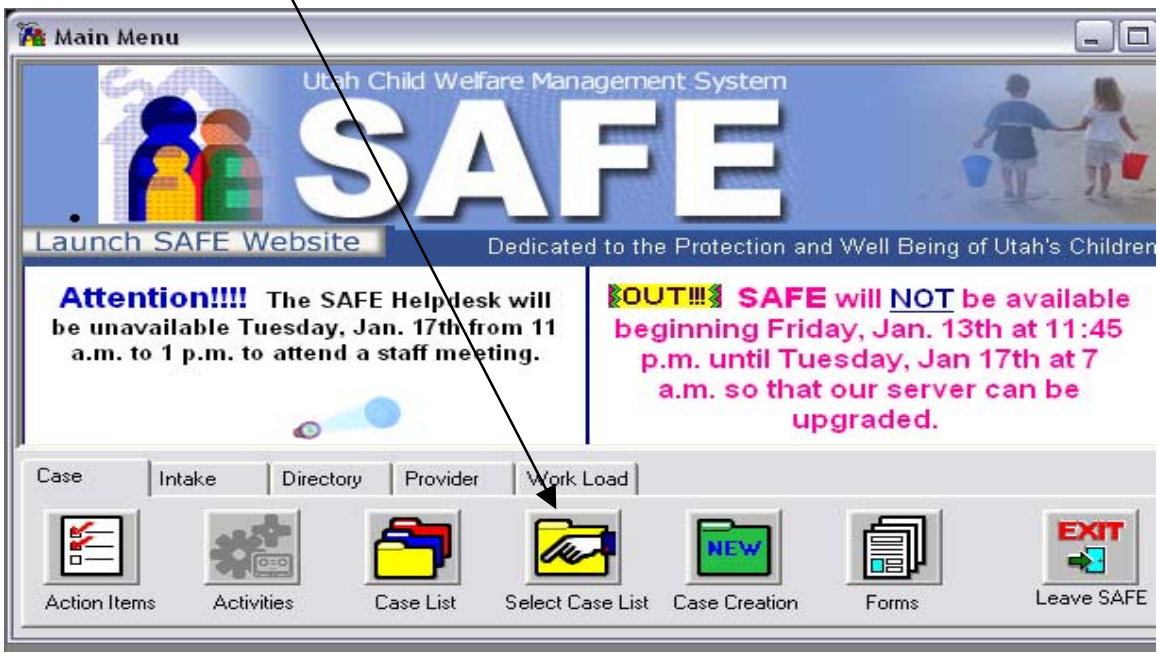
Information available from your Case List

Case Name
Case Type
Start Date
Primary Worker
Eligibility
Total Cases assigned

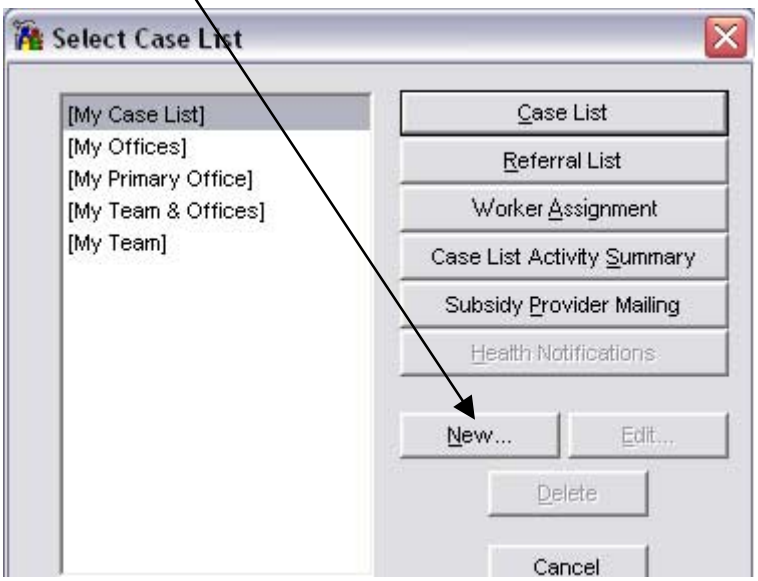
More columns and information available by using the scroll bar at the bottom of the screen.

Using the SAFE Case List to Find New Cases

From the Main Menu –"**Select Case List**".

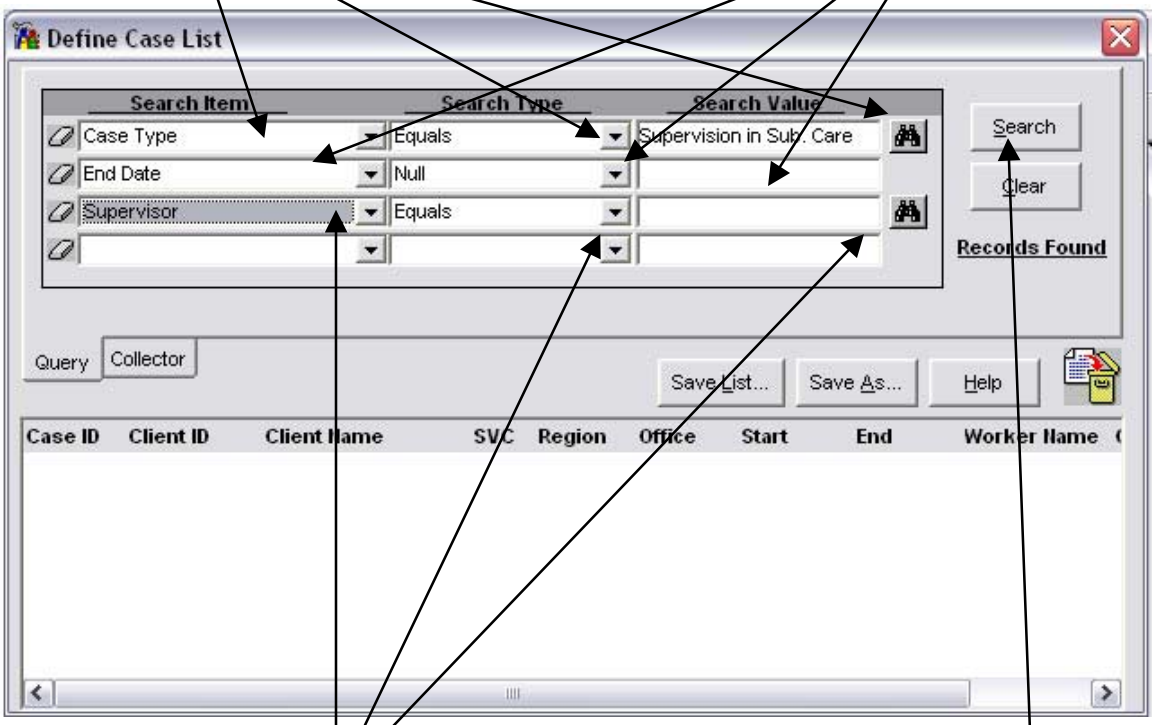


From the **"Select Case List"** menu, make sure **"My Case List"** is highlighted, then click on the **"New"** button.



Case Type
Select **"Equals"** from the drop down menu.
Select **"SCF"** from the row browser.

Select **"End Date".**
Select **"Null".**
Leave **"Blank".**

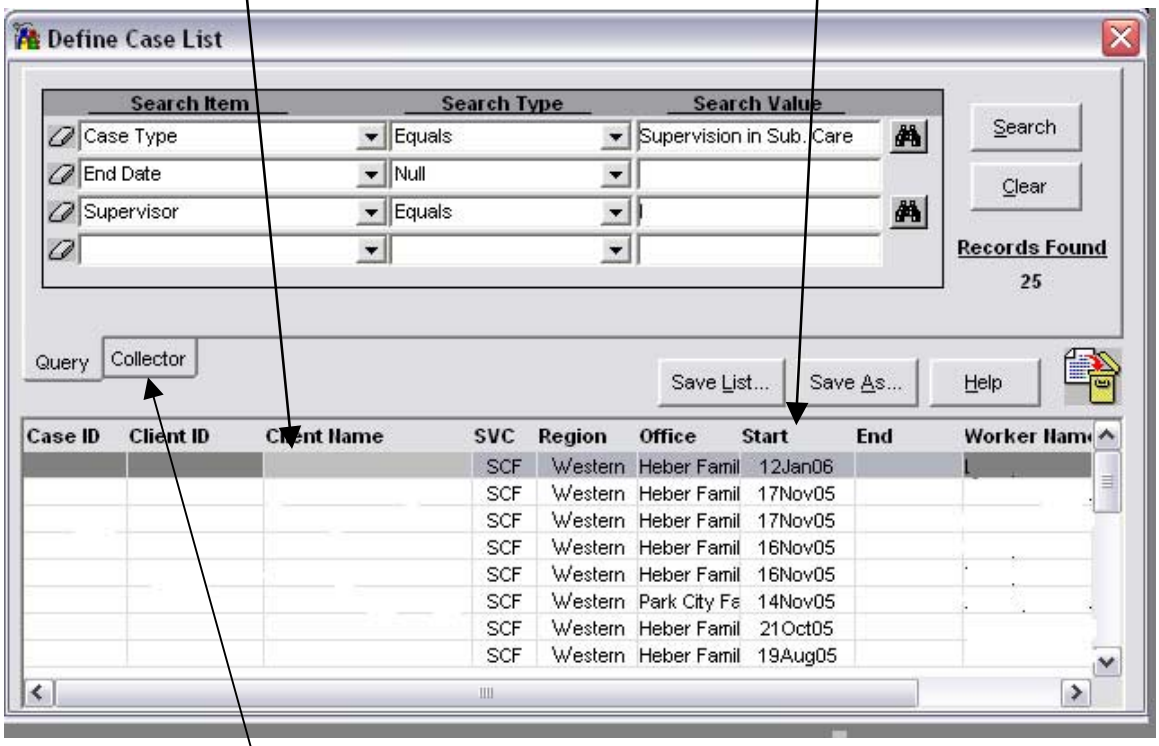


Select **"Supervisor".**
Select **"Equals".**
Select **"Supervisor's name"** from the row browser.

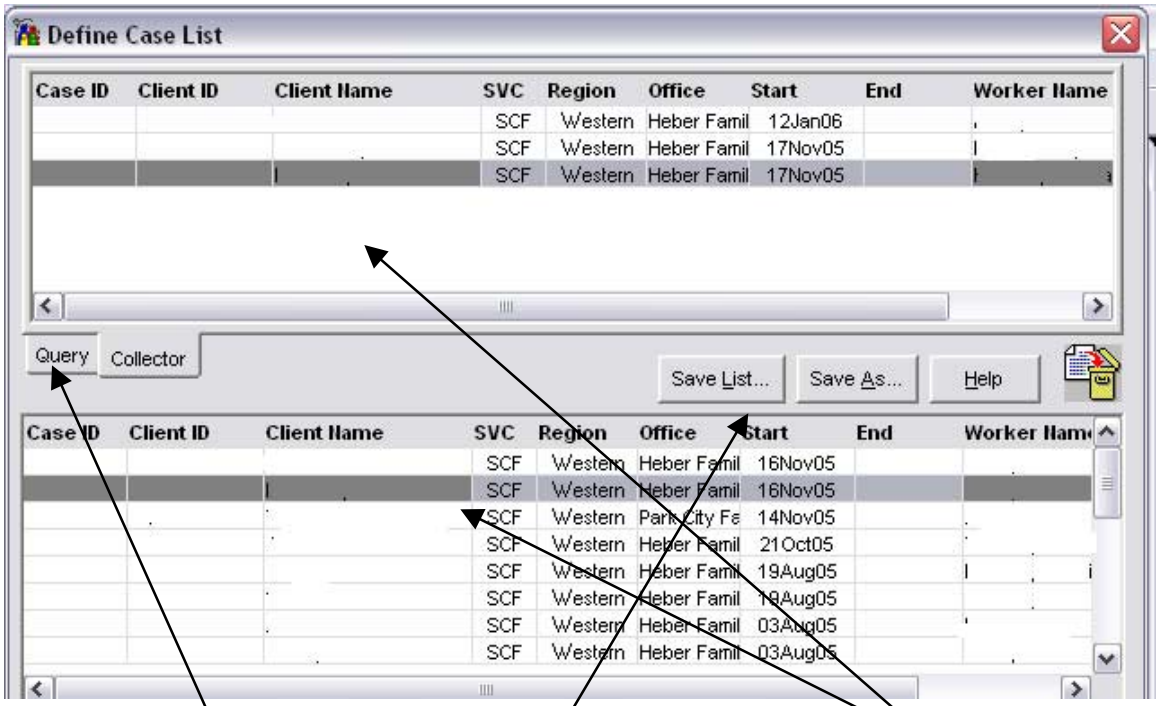
Click **"Search".**

Cases assigned to the selected supervisor's team will be displayed.

"Double Click" on the "**Start"** column to bring the newest cases to the top.



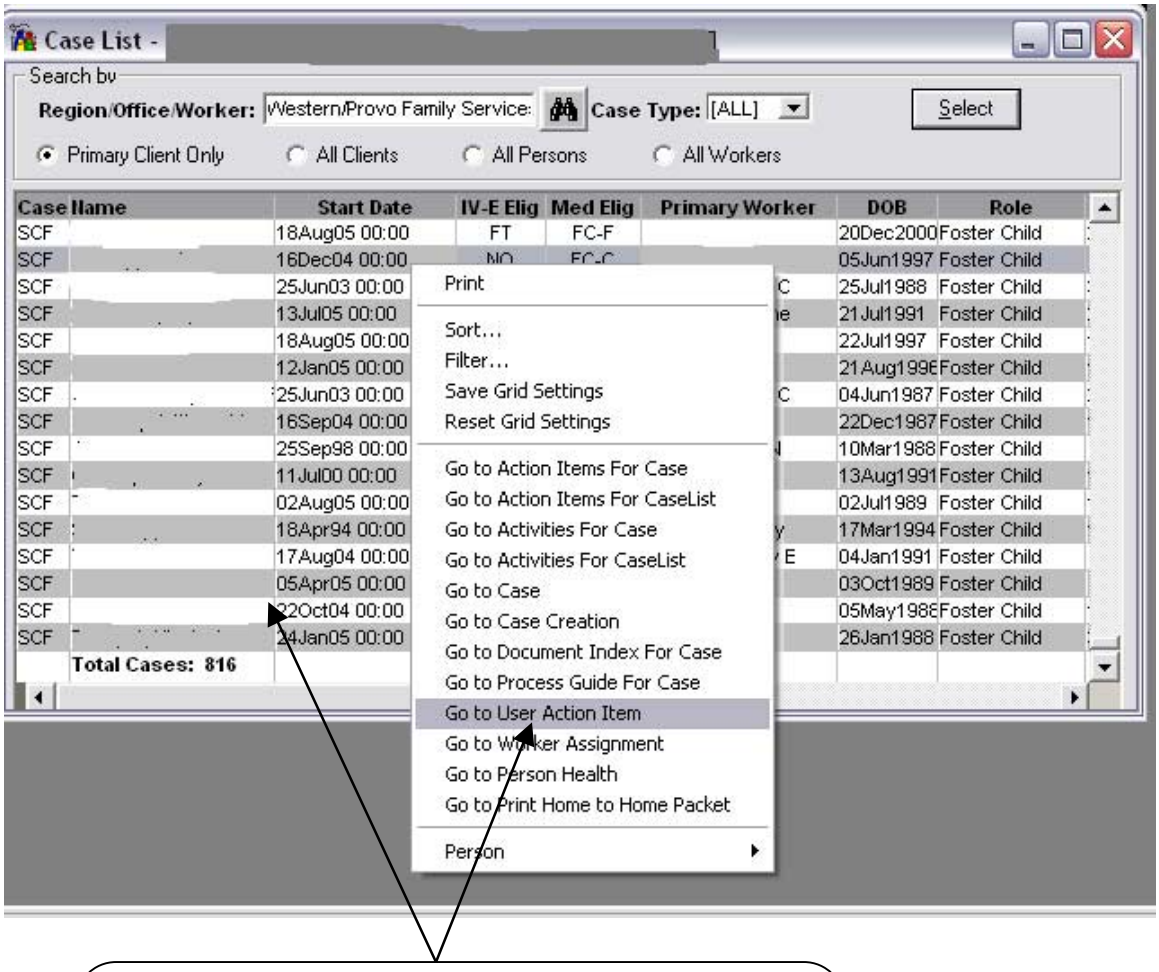
Cases may be selected and moved to the **"Collector".** Select the **"Collector Tab".**



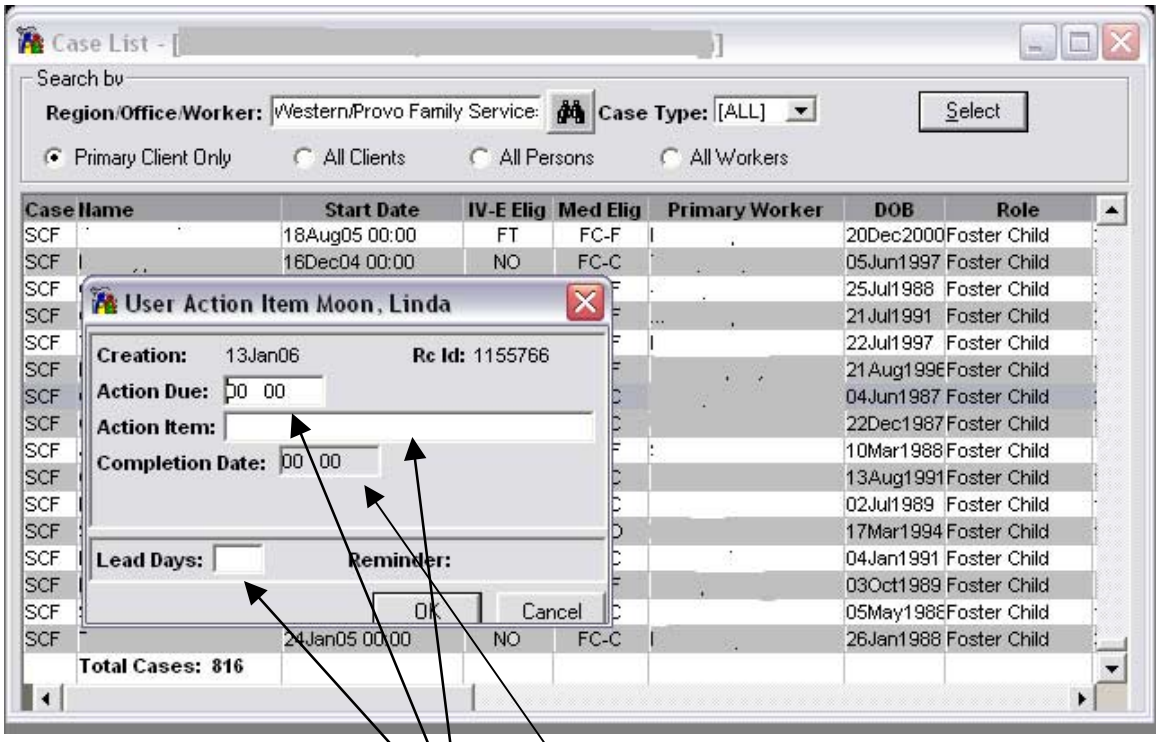
Select the desired cases with the mouse button. Multiple cases can be selected by holding the **"CTRL"** button down while selecting. **"Drag"** the cases to the **"Collector Box".**

You may return to the **"Query"** screen and search for other team lists. Once you have the desired list collected in the **"Collector Box"** you may **"Save"** it or **"Print"** by clicking the right mouse button.

Using User Action Items in SAFE
From the Case List Display



Select the case with the mouse.
"Right Click".
This will display a drop down box.
Select **"Go to User Action Item".**

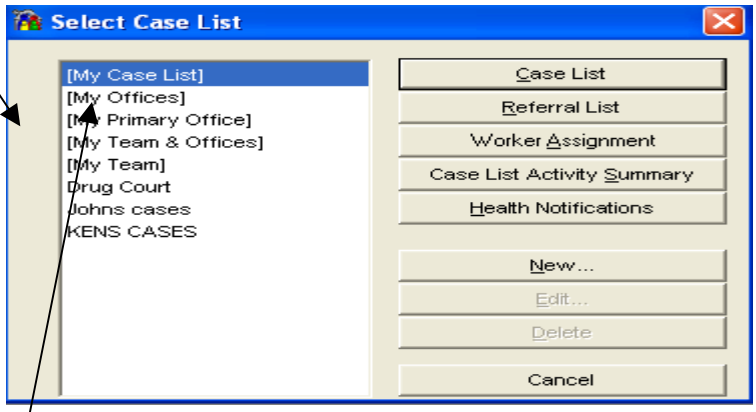


Enter **"Action Due"** date.
Enter **"Action Item".**
Enter **"Lead Day"** if you want SAFE to remind you prior to the due date.
The **"Action Item"** will appear in your notifications on the requested date when you log onto SAFE.

When you clear the **"Action Item"**, you must enter a completion date or the **"Action Item"** will remain in the case.
If the **"Action Item"** remains in the case it will have to be cleared prior to case closure.

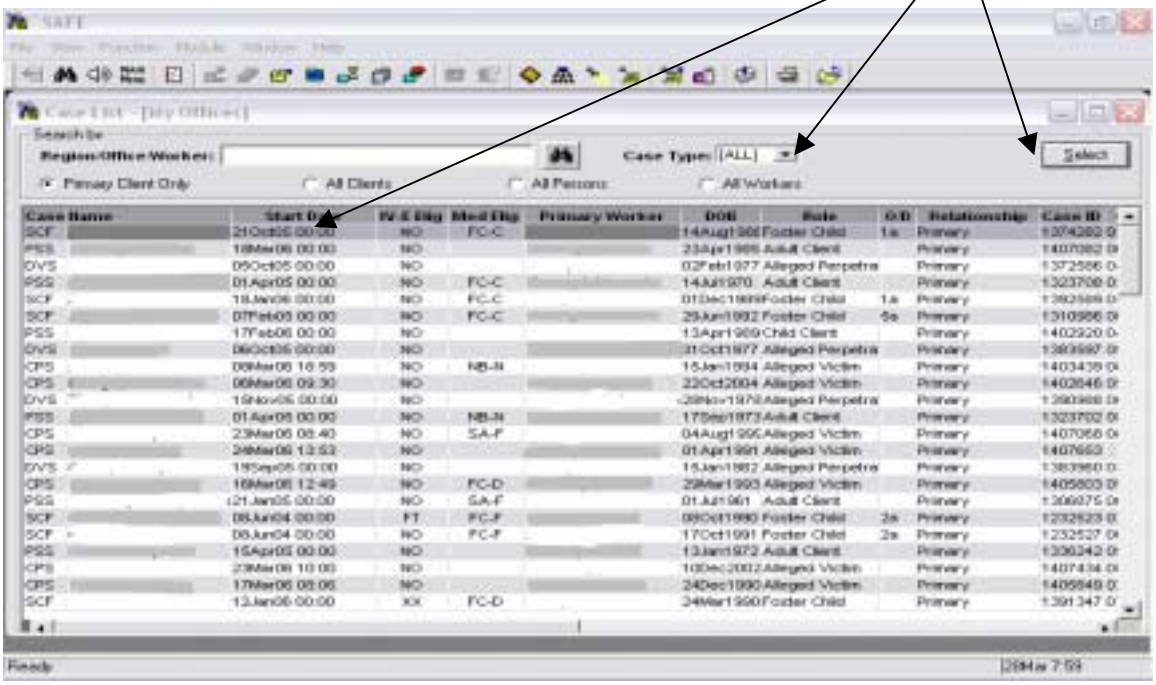
SAFE Worker Assignment

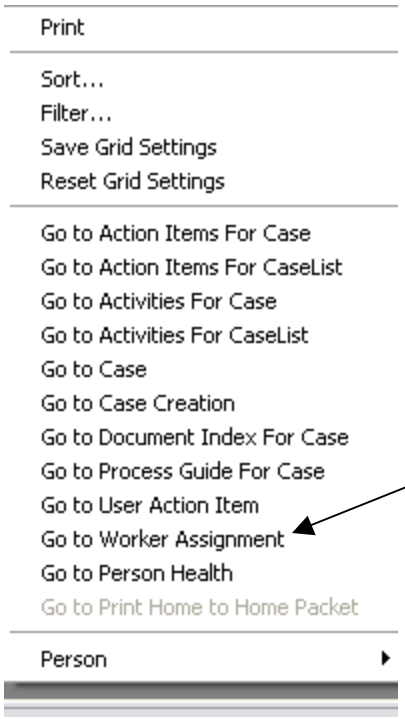
Open **"Select Case List"** from the Main Menu.



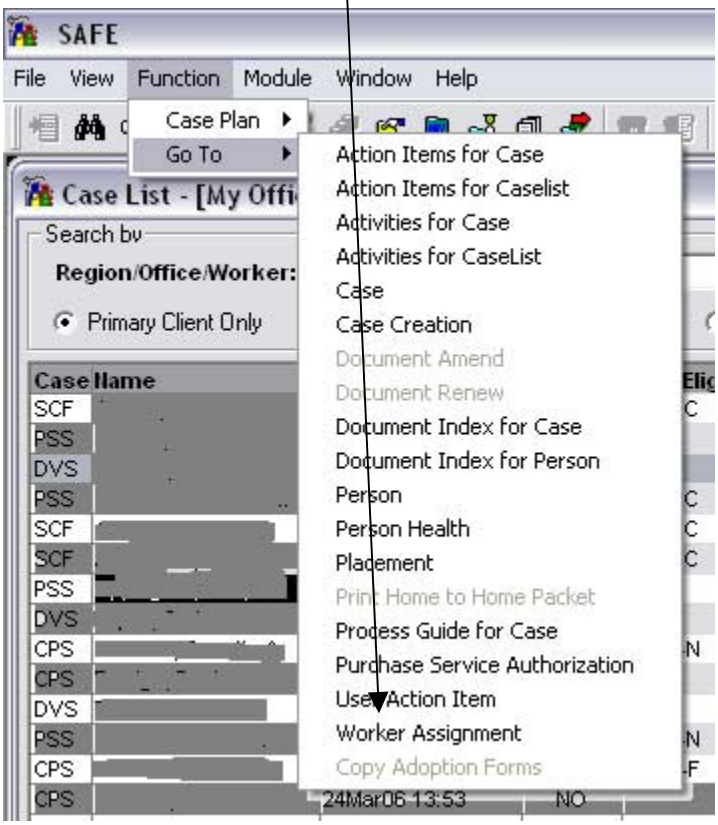
Open **"My Offices".** All of the offices you work with should be listed here. If that is not the case, contact the SAFE Helpdesk.

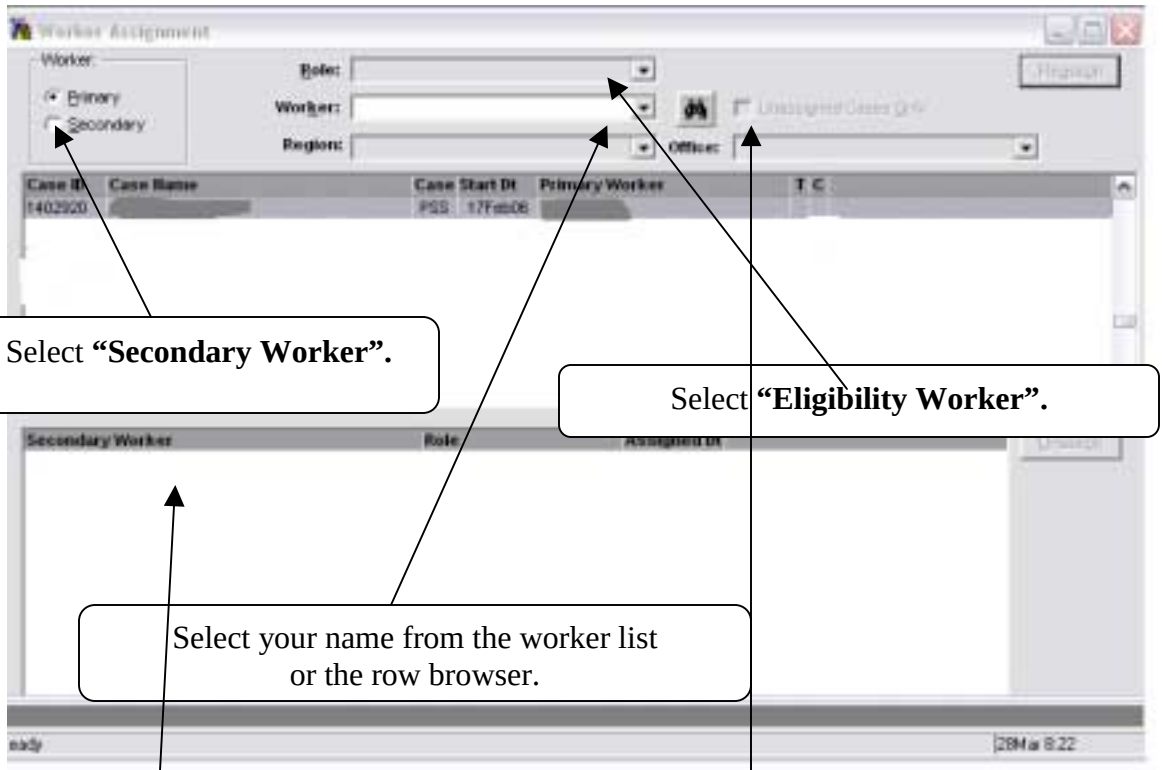
Select case type **SCF or AAM** and click **Select"**.
Click on the **"Start"** column to bring most recent removal to the top.





"Right Click" on case**.** Select **"Go to Worker Assignment"**
OR
Highlight the case and go to the tool bar, click **"Function",** then to **"Worker Assignment"**.





Select **"Secondary Worker".**

Select **"Eligibility Worker".**

Select your name from the worker list or the row browser.

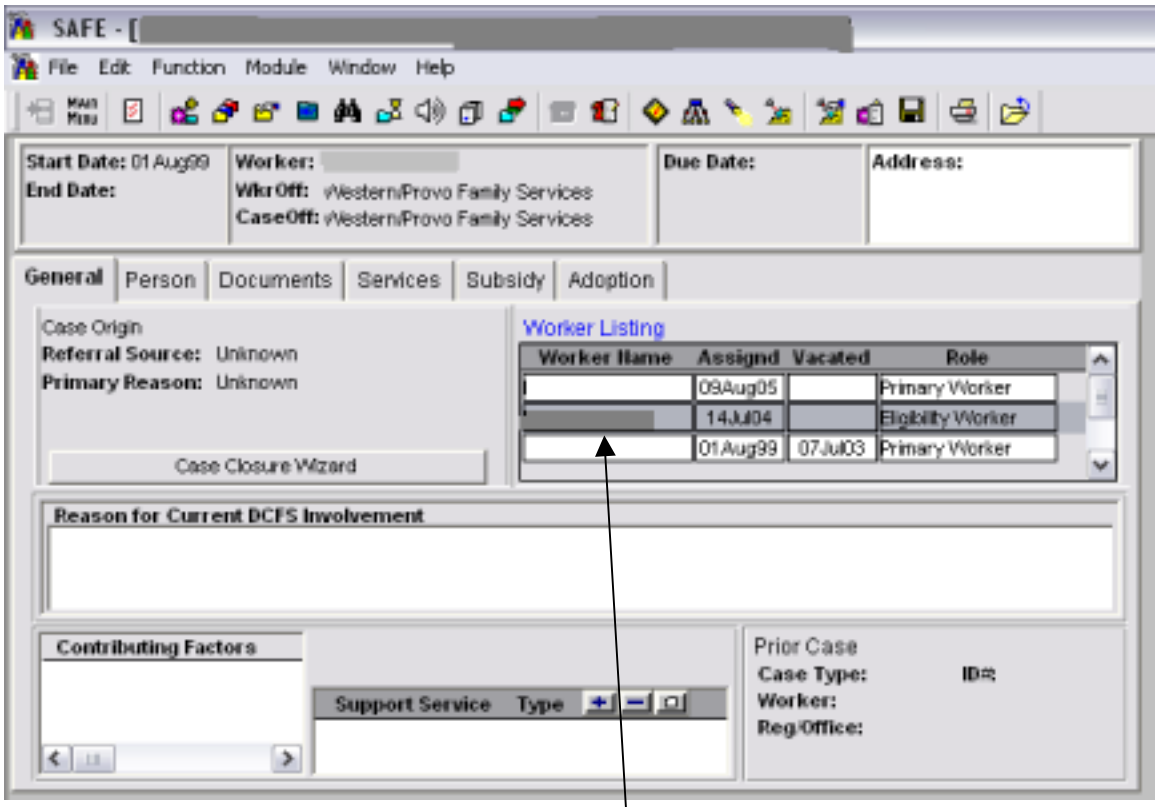
Putting a check in **"Unassigned Cases Only"** will bring all of the current SCF or AAM cases that have not been assigned to you.

In the **"Assign"** box highlight the name of the child that has not been assigned and hit assign.
OR
You can assign multiple new cases by highlighting the first child and while holding down the **"Ctrl"** key highlight the remaining unassigned cases, then click **"Assign".**

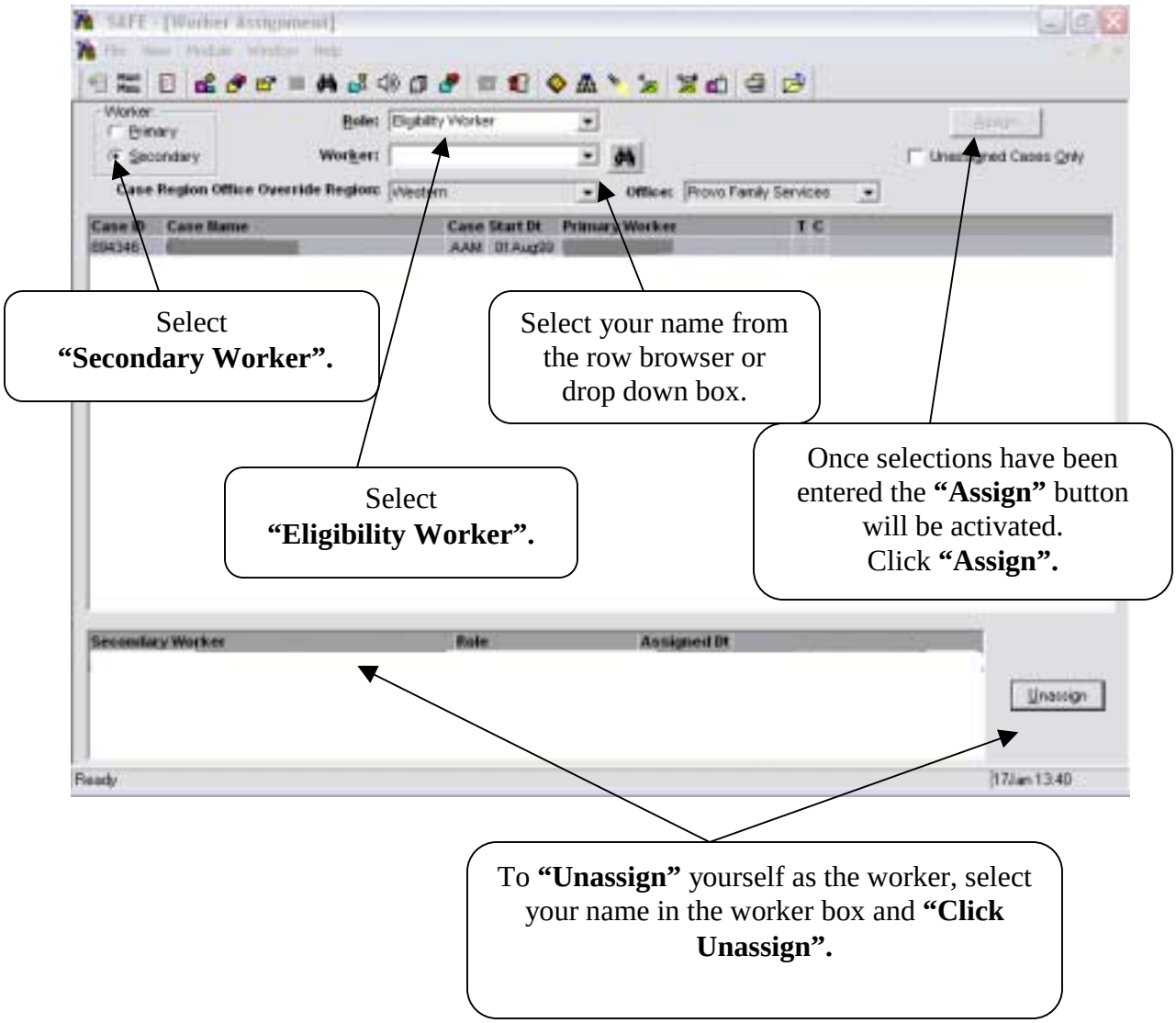
The next time you log in to SAFE you will get an alert about pending cases assigned to you. Closing the notify box means you have accepted these cases.

"OR"

Worker Assignment from SAFE Case

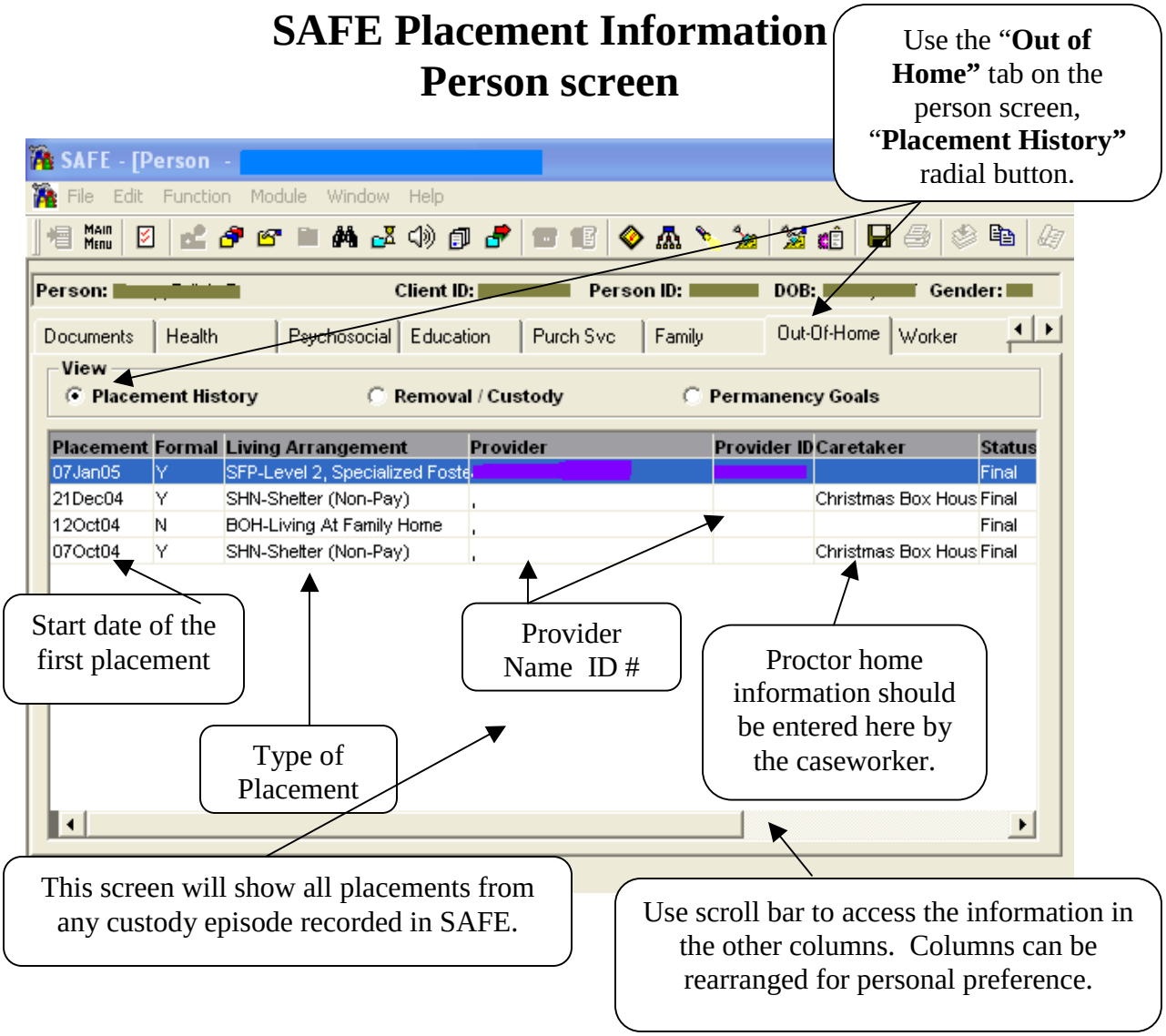


Right Click in the **"Worker Listing"** box.



****When you assign yourself as a worker, SAFE will add an activity in the case activity logs.**

SAFE Placement Information Person screen

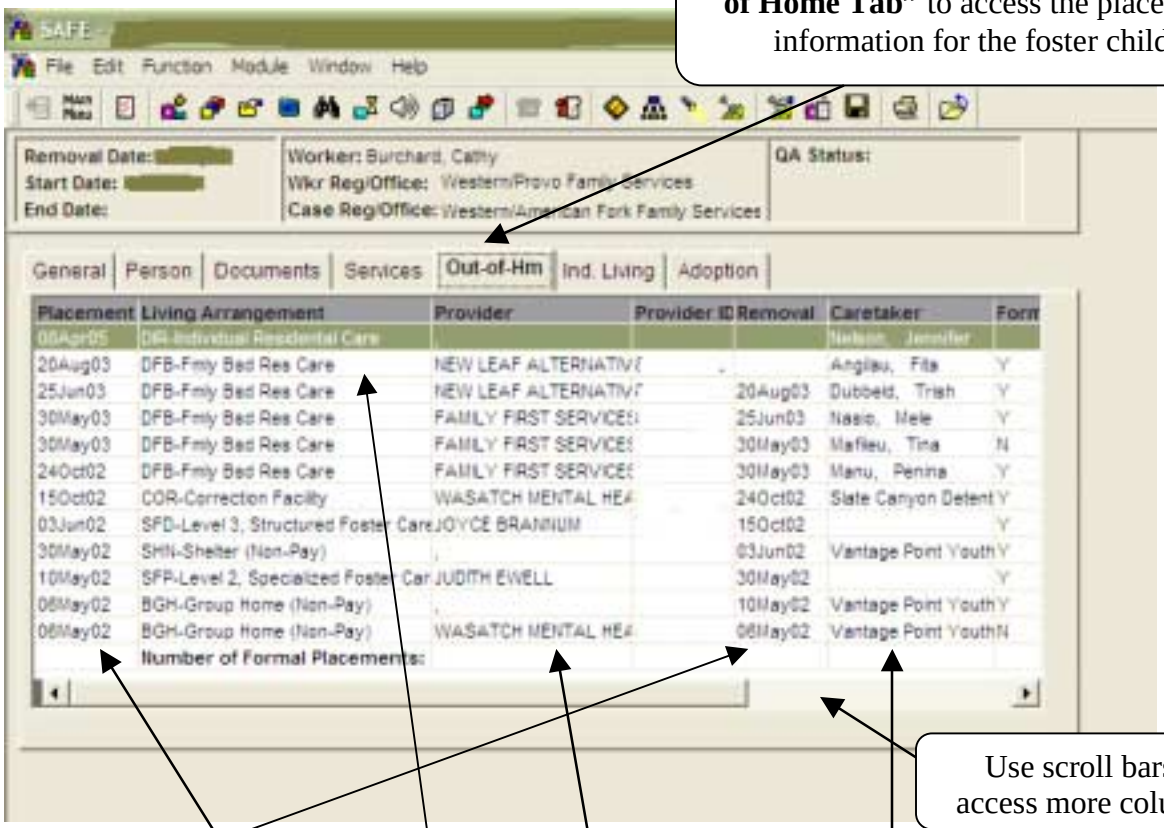


- ✓ Check the start date of the first placement to verify the date the child last lived with the caretaker relative losing custody.
- ✓ The placement history should be reviewed to ensure that each placement meets the IV-E and Medicaid placement requirements. The placement must be a qualified placement for IV-E eligibility purposes and also be fully licensed for a foster child to be IV-E eligible and IV-E reimbursable.
- ✓ The placement must be receiving a Foster Care maintenance payment for a child to be Foster Care Medicaid eligible.
- ✓ Information about the licensure of foster homes licensed by the Office of Licensing is available in the Foster Care Licensing Database.
- ✓ Proctor home licensing certificates and copies of the proctor parents' BCI's must be included in the IV-E eligibility case record.

Residential placement licensure can be checked online at **http://www.hslic.state.ut.us/**

SAFE Placement Information
SCF case "Out of Home" Tab

In the open SCF case, click on the **"Out of Home Tab"** to access the placement information for the foster child.



Use scroll bars to access more columns.

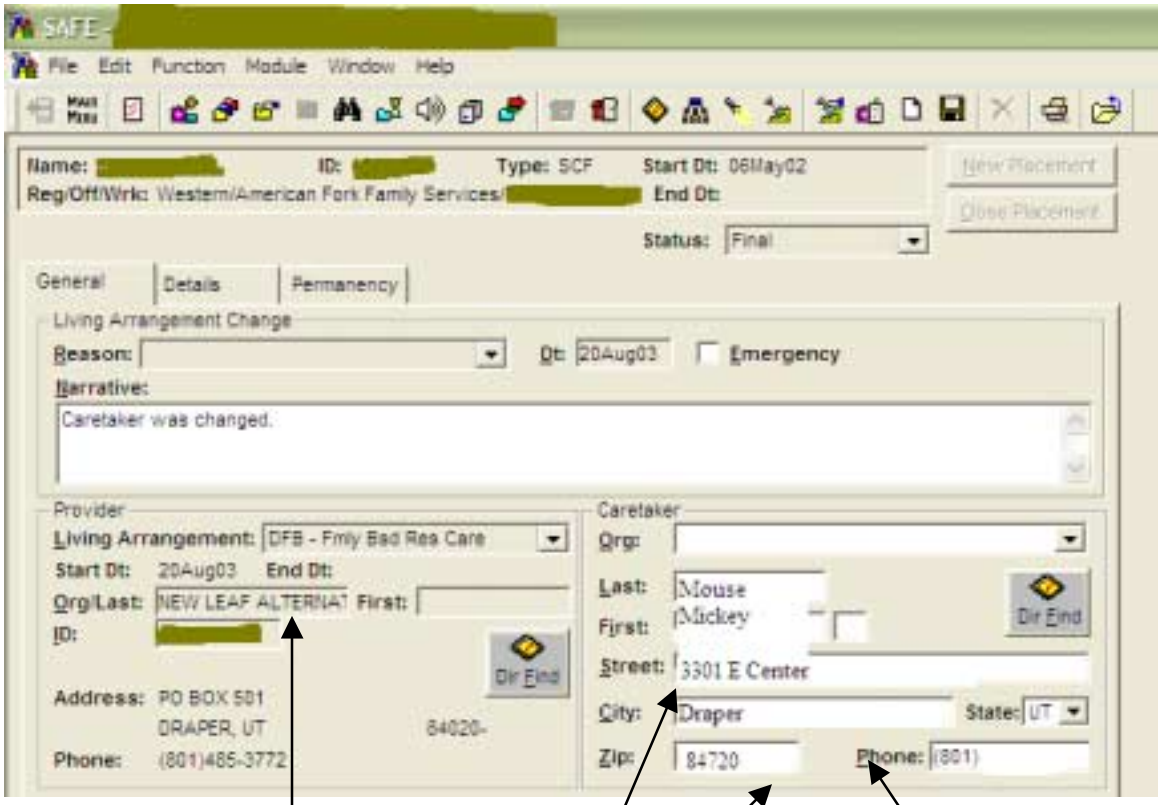
Placement start and end dates.

Caretaker Name
Name of the caretaker is entered here by the caseworker, if the caretaker is different than the Provider.
This is where Proctor Home information is located.

For additional placement information **"Double Click"** on that placement.

Provider Name
Name of foster parent, group home, residential placement or the name of the agency that licenses the caretaker.

SAFE Screen for Proctor Placements



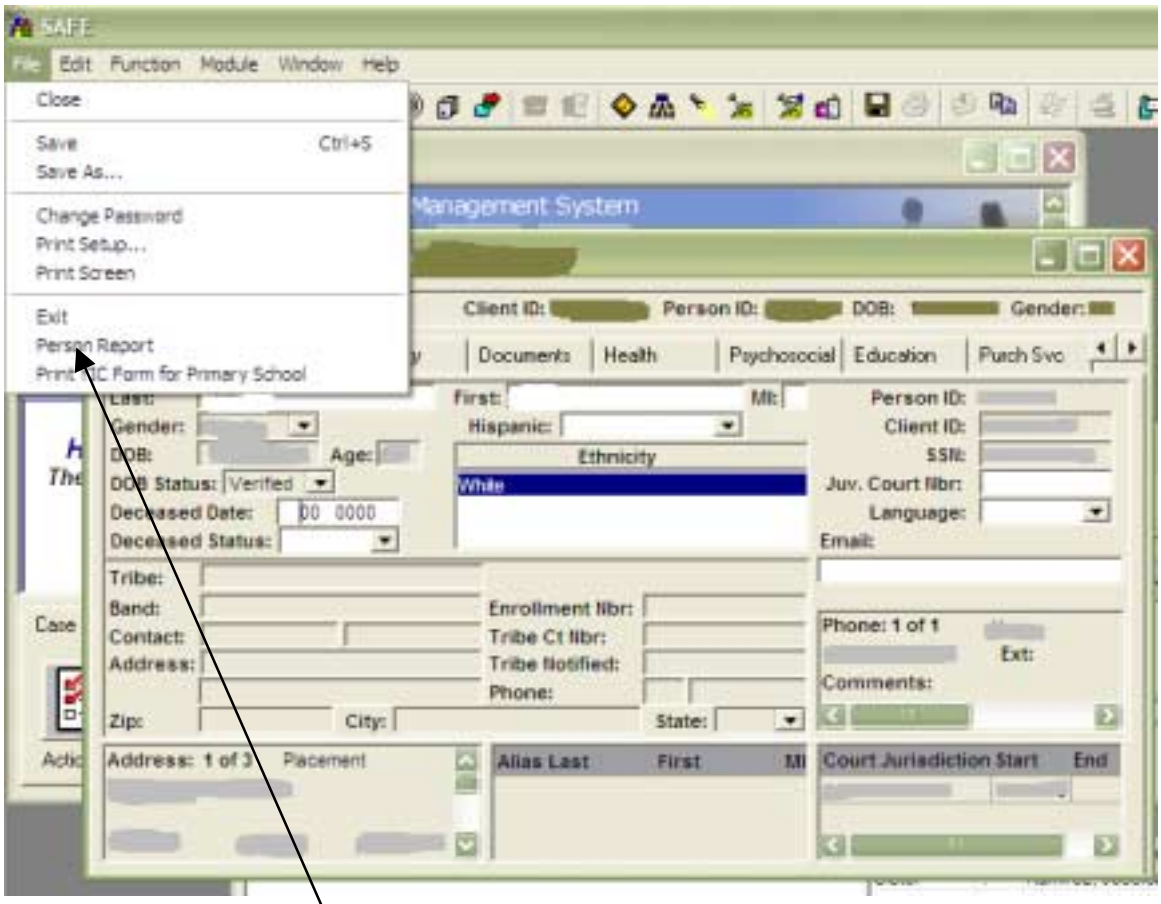
Provider
Name of agency that has licensed the proctor home.

Proctor home licensed by the provider.

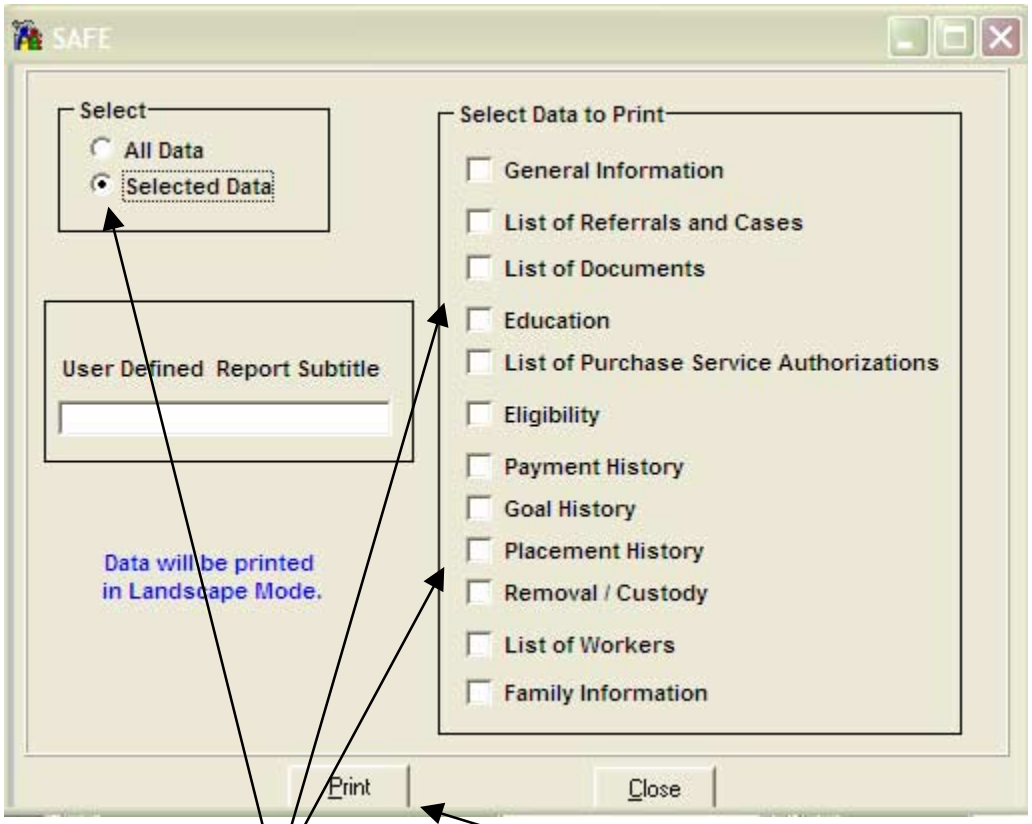
Proctor home name, address and phone number should be entered in the caretaker field.

The Medicaid Card must be mailed to the place where the foster child lives. The proctor home is where the child is living.

SAFE Placement Information
Person Report



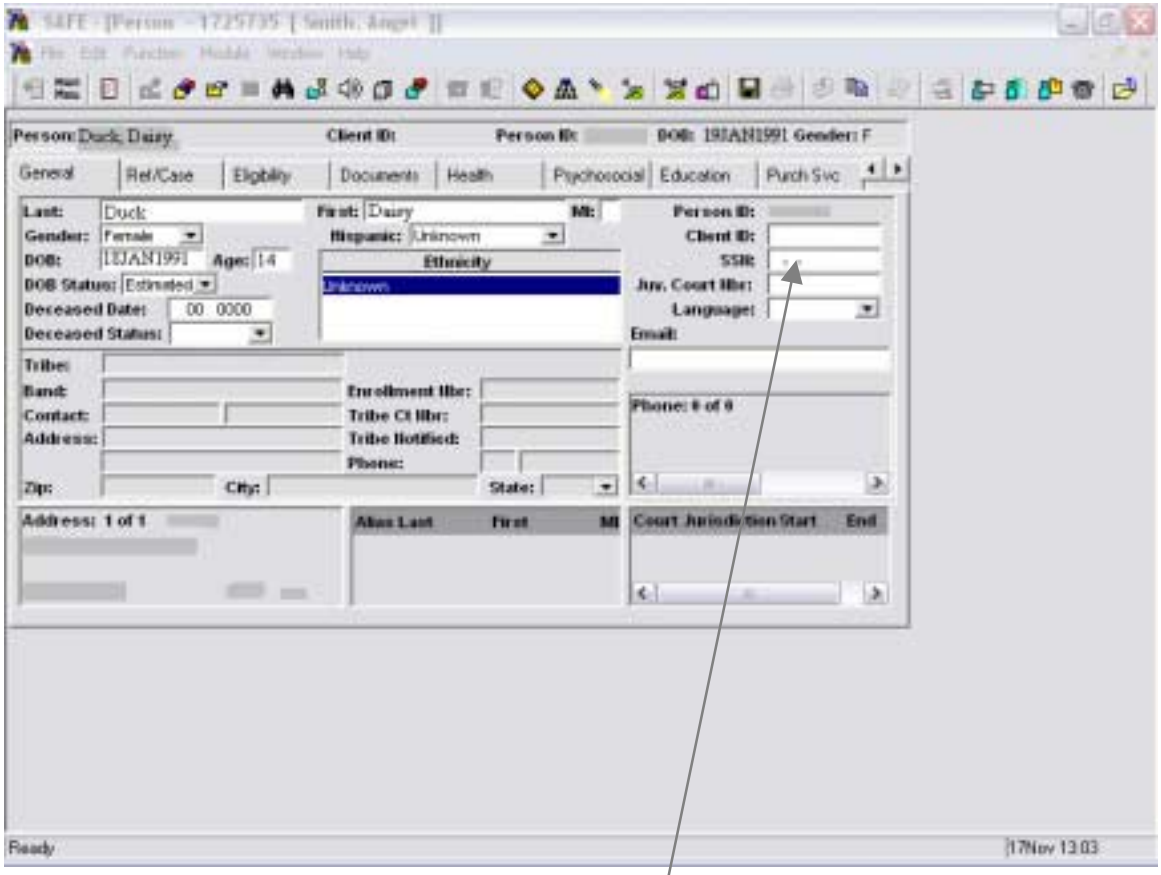
With the person window open, use the drop down box from file and select **"Person Report".**



Select the option of **"All Data"** or **"Selected Data".** When **"Selected Data"** is selected, then you can choose the information you want to view or print.

Select **"Print".**

Adding a Social Security Number in SAFE

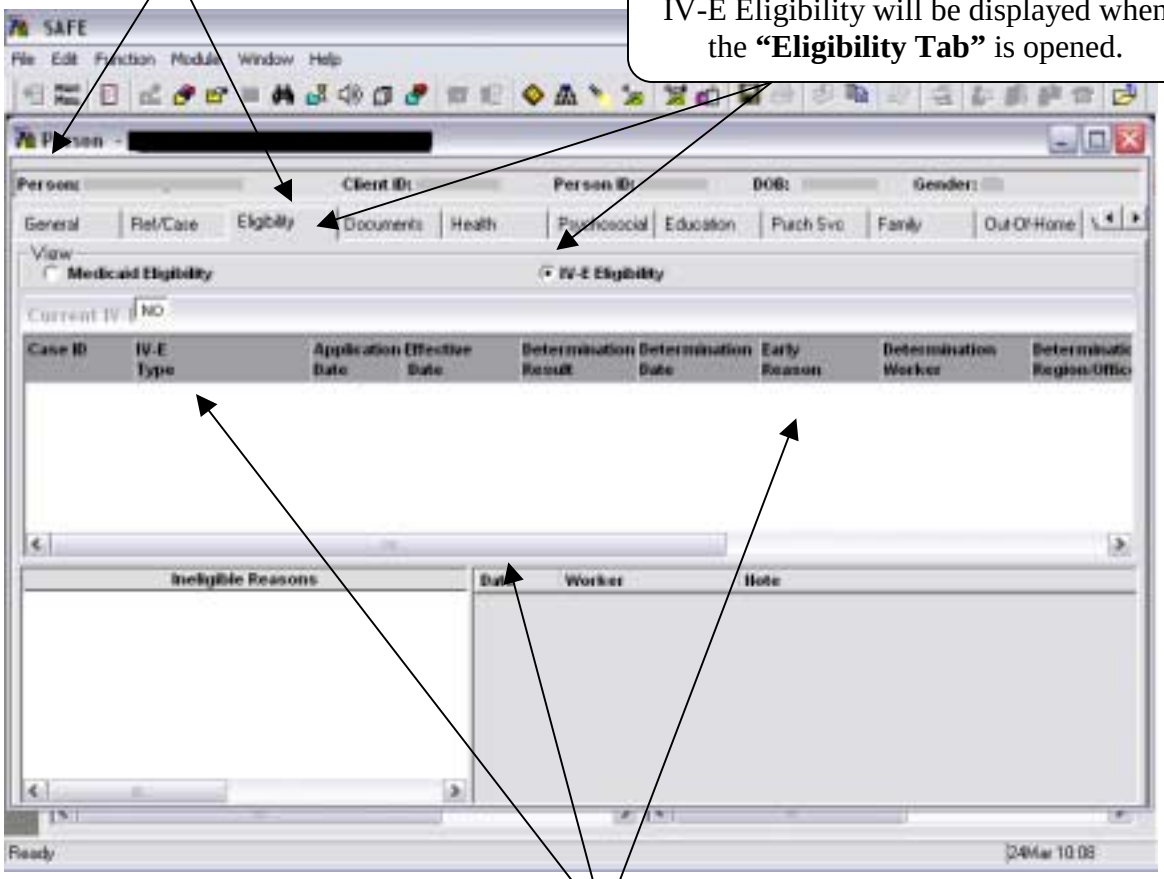


Enter the SSN.
SAVE.
Message stating that **"SSN matches an SSN associated with this number, are they the same client?"**
Double check to insure the client is the correct client. If the information is correct, answer, "**Yes"** to complete the **SAVE**.

SAFE Eligibility Screens

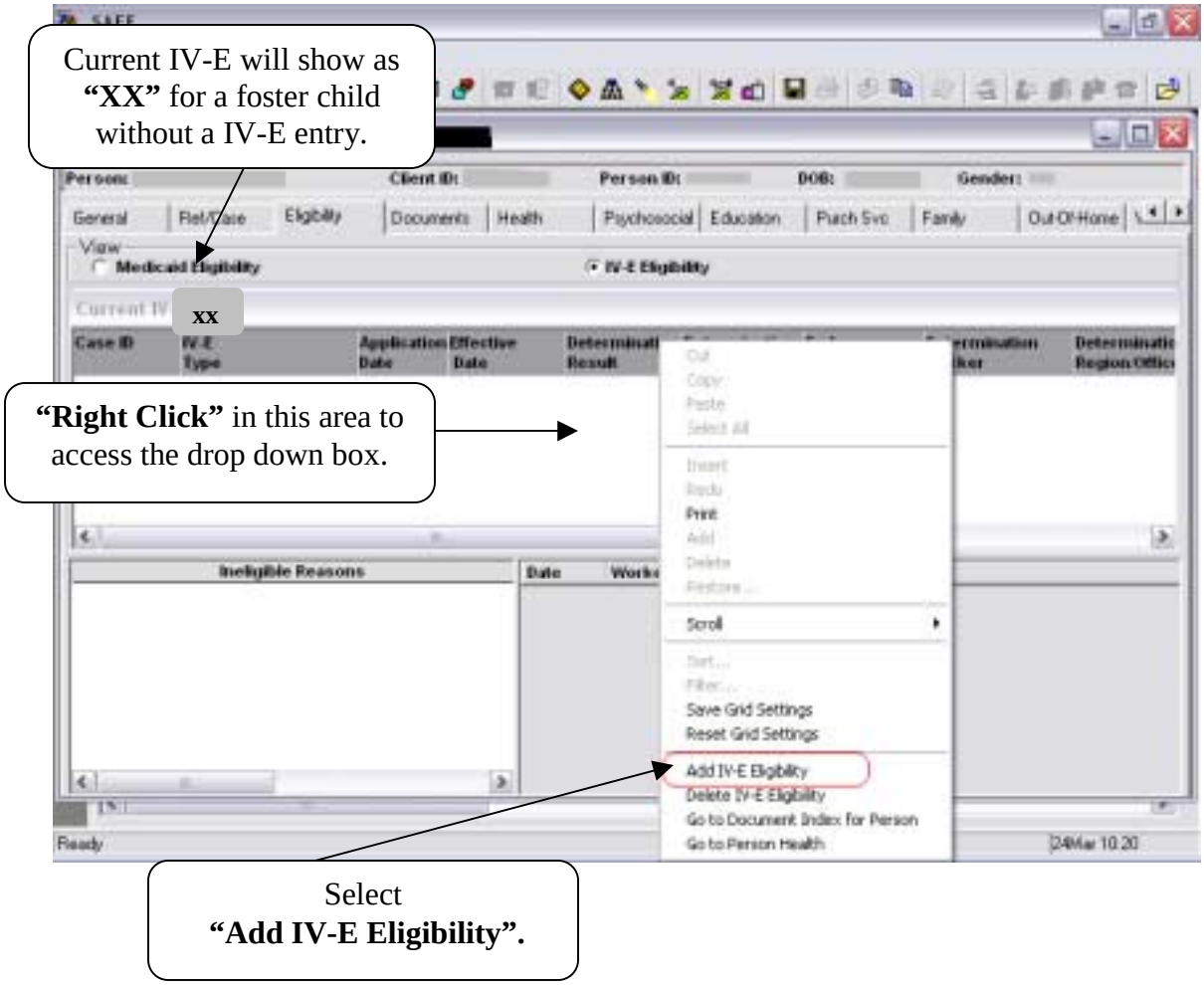
SAFE Person Screen.
Eligibility Tab.

IV-E Eligibility Radial Button.
IV-E Eligibility will be displayed when the **"Eligibility Tab"** is opened.



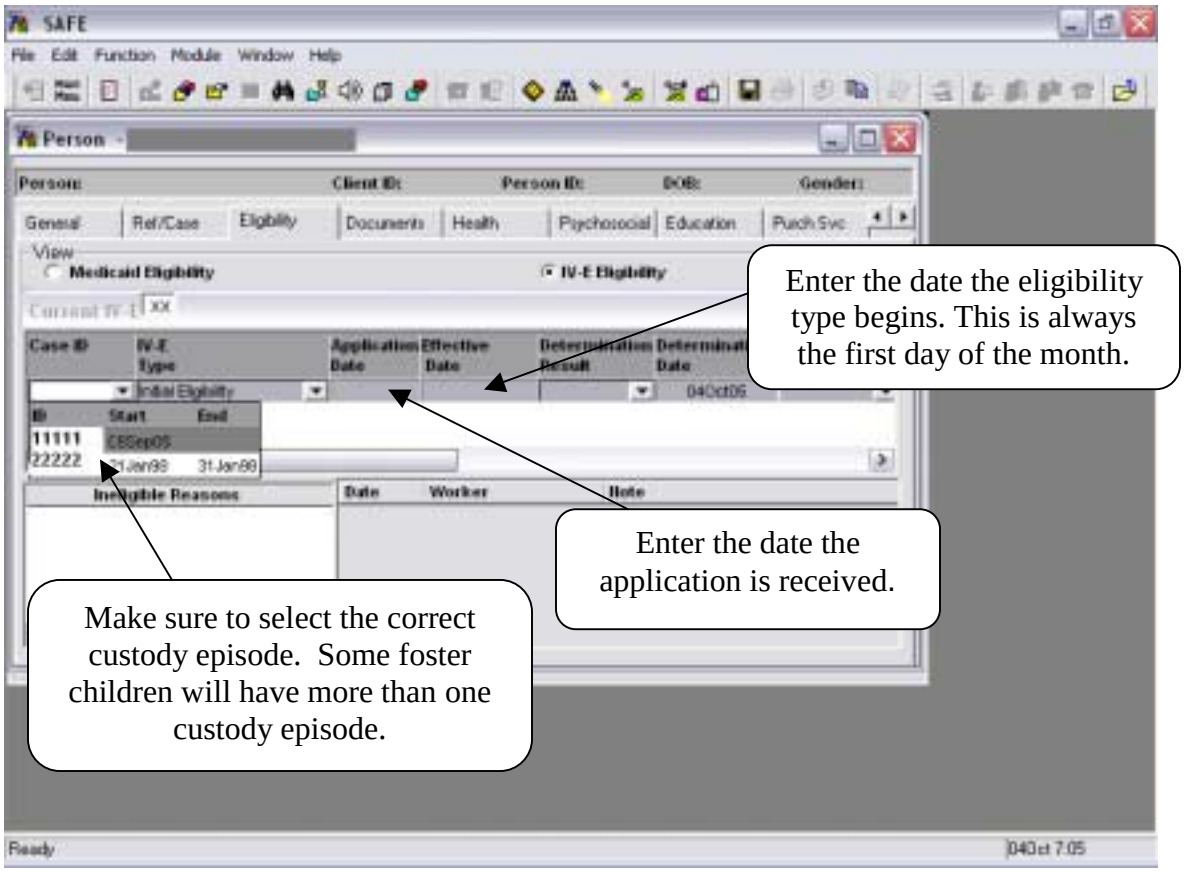
13 Columns.
Columns may be arranged for personal preferences.
Use the scroll bar to display additional columns.

IV-E Eligibility Entry



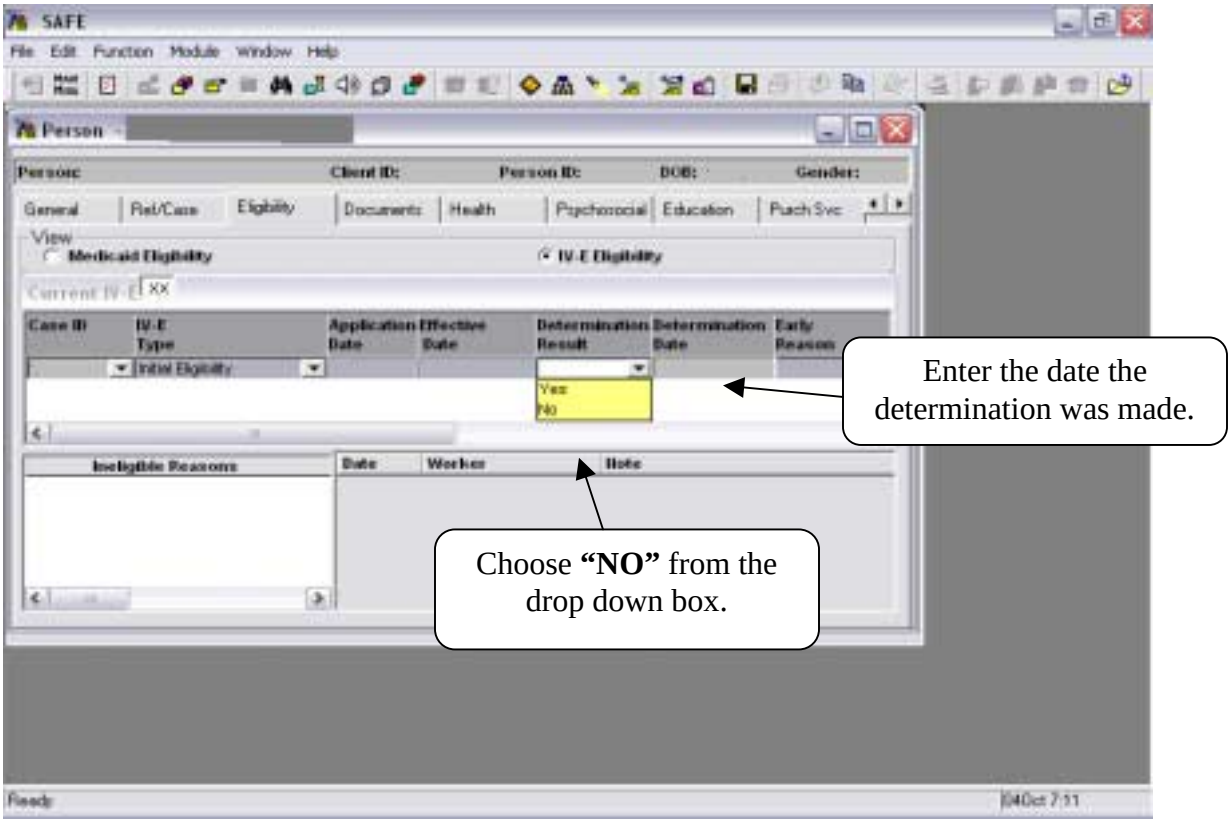
****Remember****

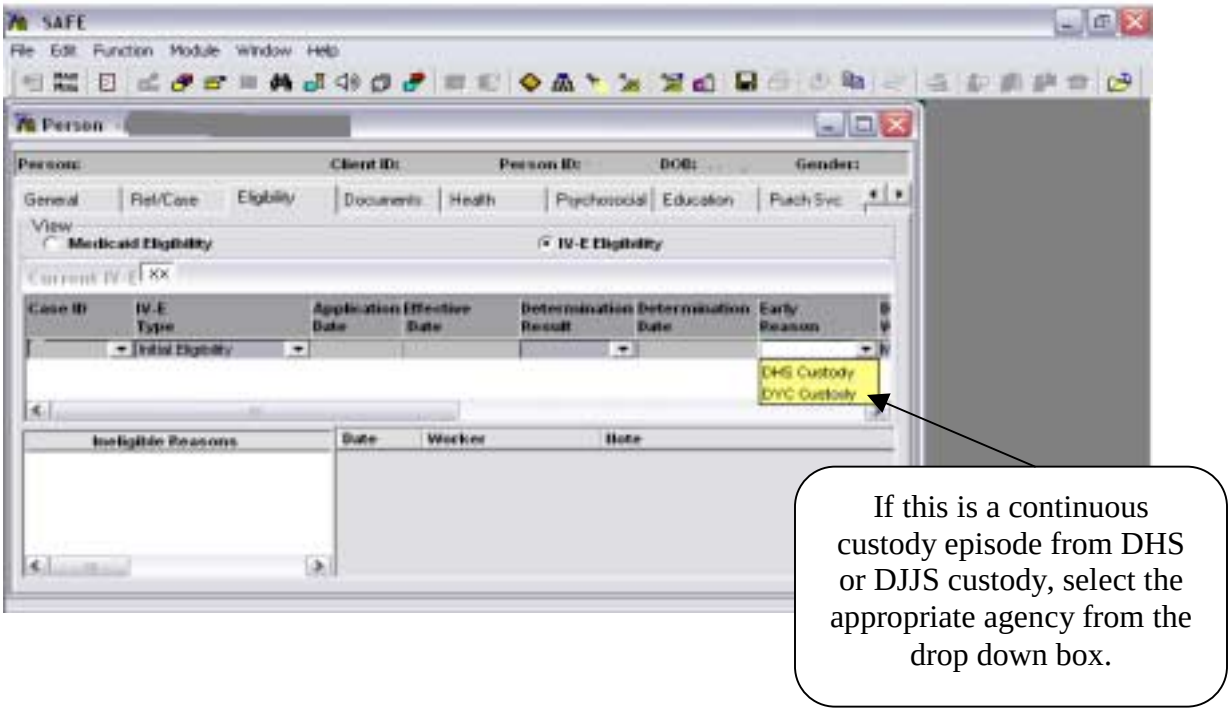
DO NOT enter the IV-E eligibility information into SAFE until **ALL** of the IV-E determination paperwork has been completed.

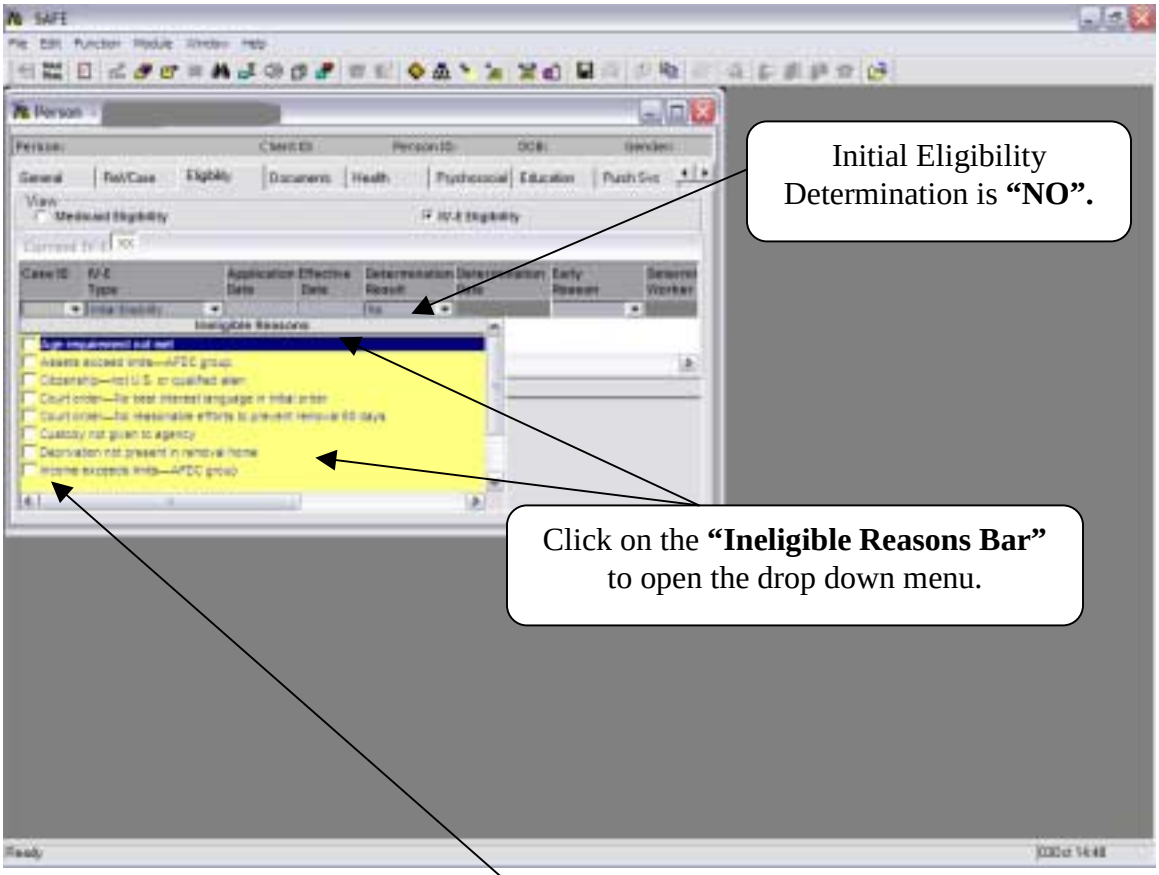


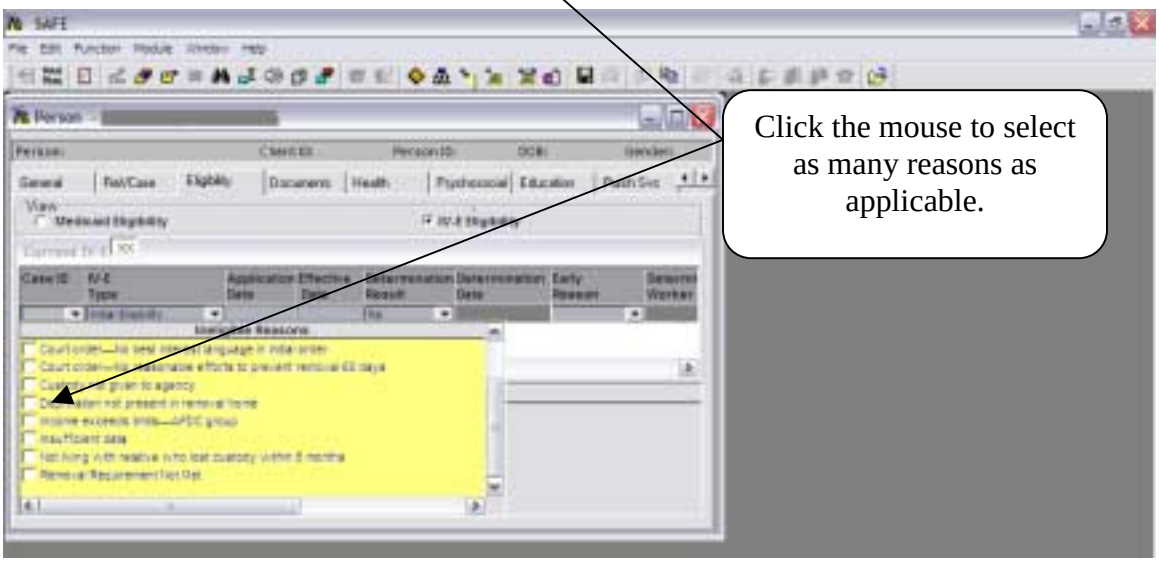
- **Date format for SAFE Eligibility Entry is DD/MON/YR (01OCT05).**
- **The determination worker, region and office will auto fill with the name of the eligibility worker that is logged into SAFE.**

How to Proceed if the Initial Eligibility Determination is "NO"



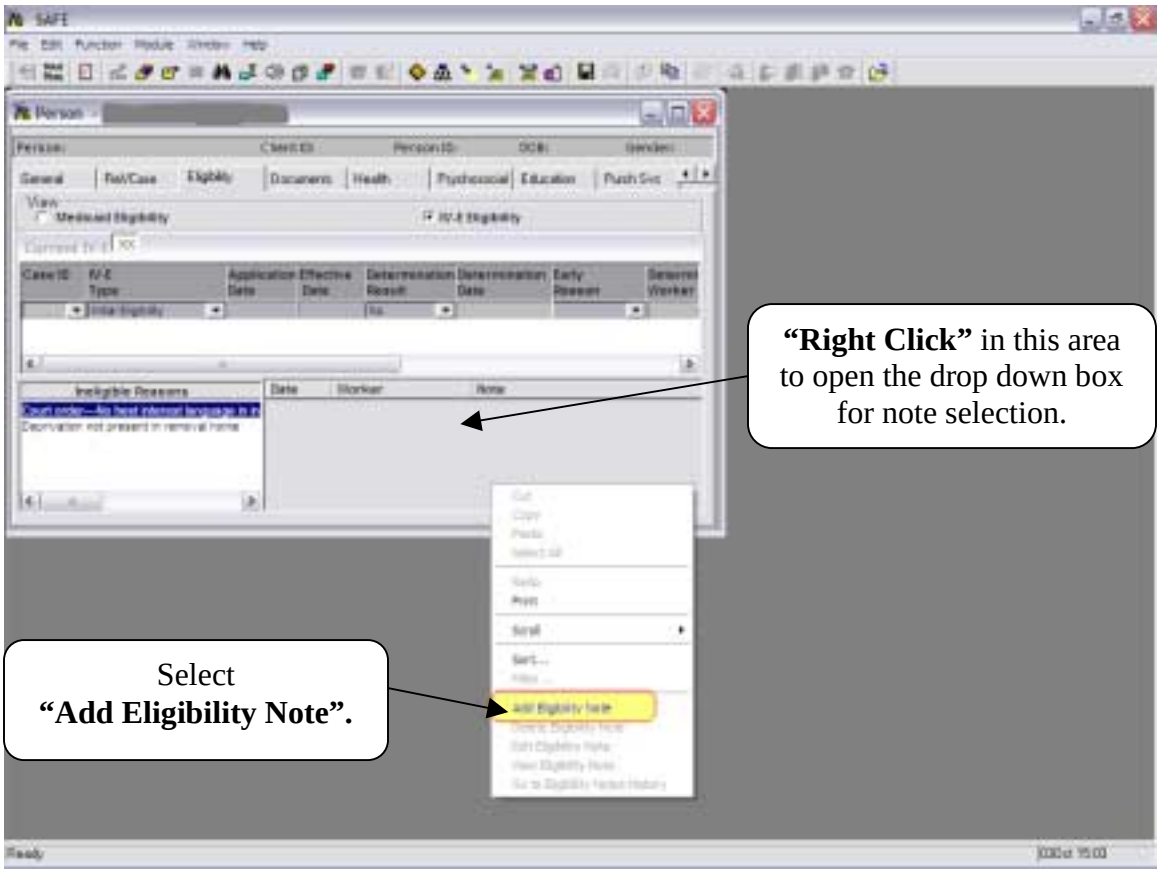


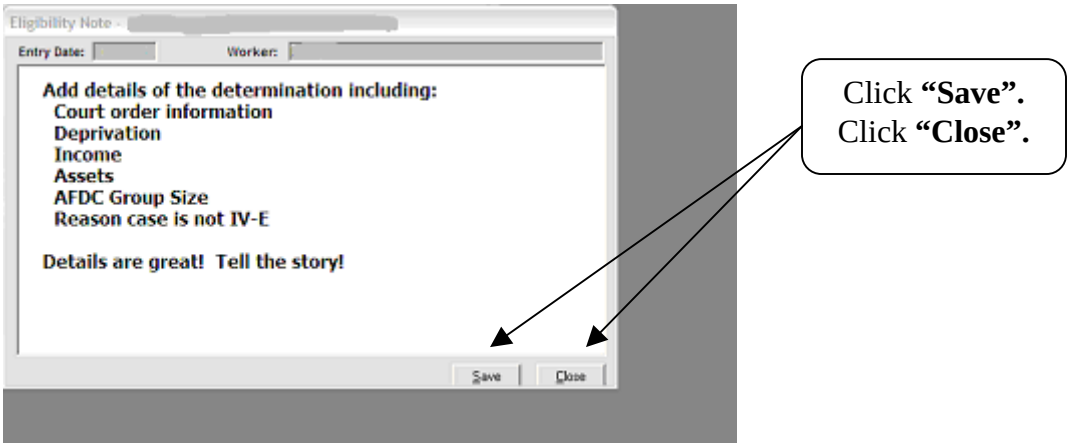

Initial Eligibility Determination is **"NO".**
Click on the **"Ineligible Reasons Bar"** to open the drop down menu.


Click the mouse to select as many reasons as applicable.

****SAVE****

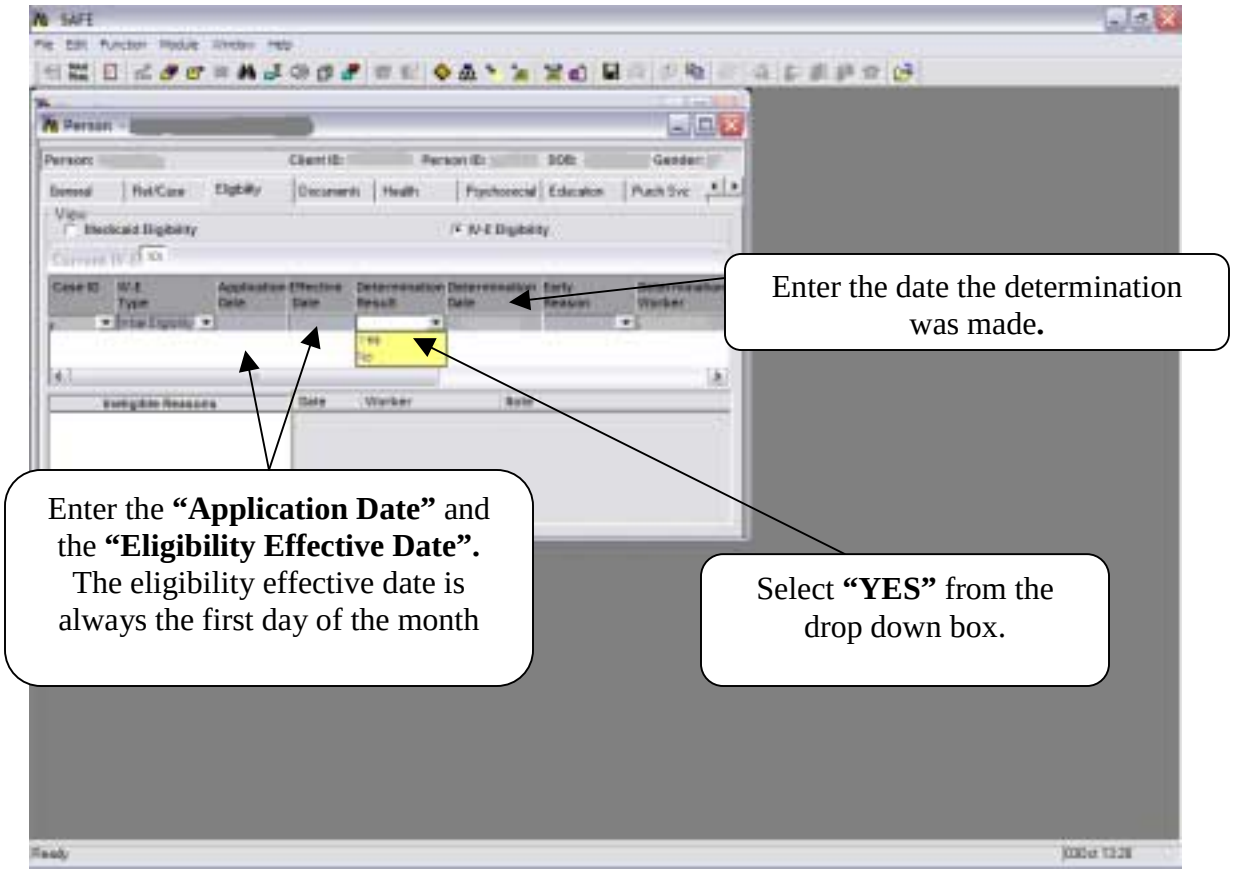
Add Eligibility Notes

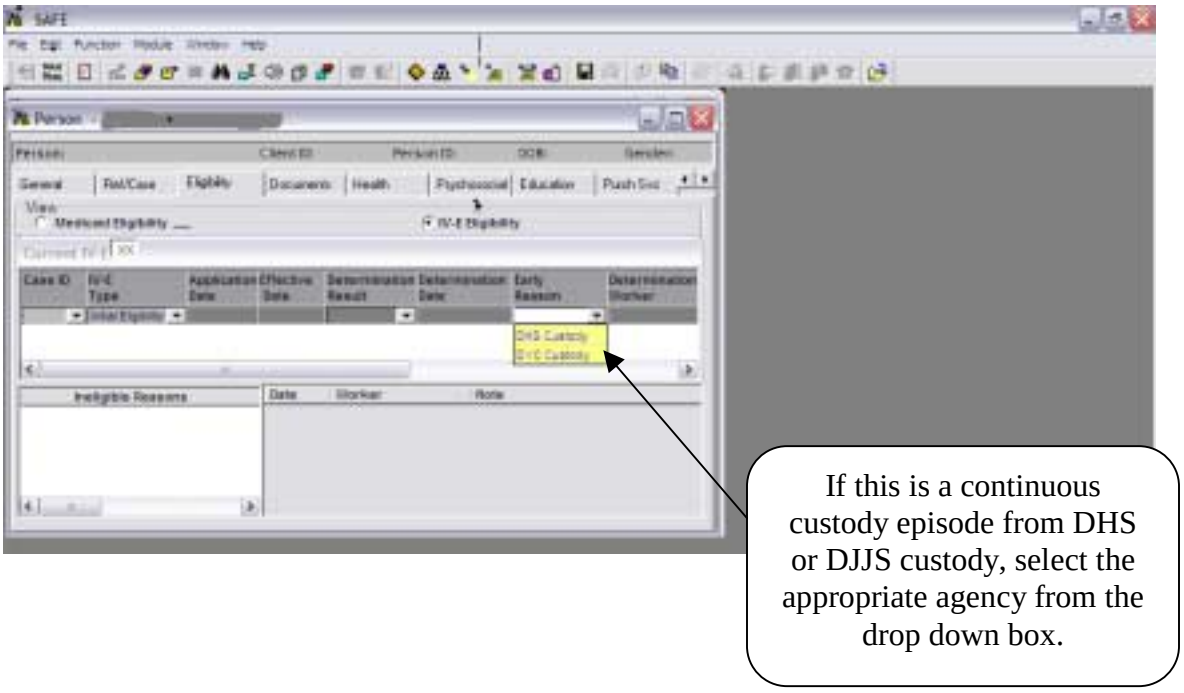


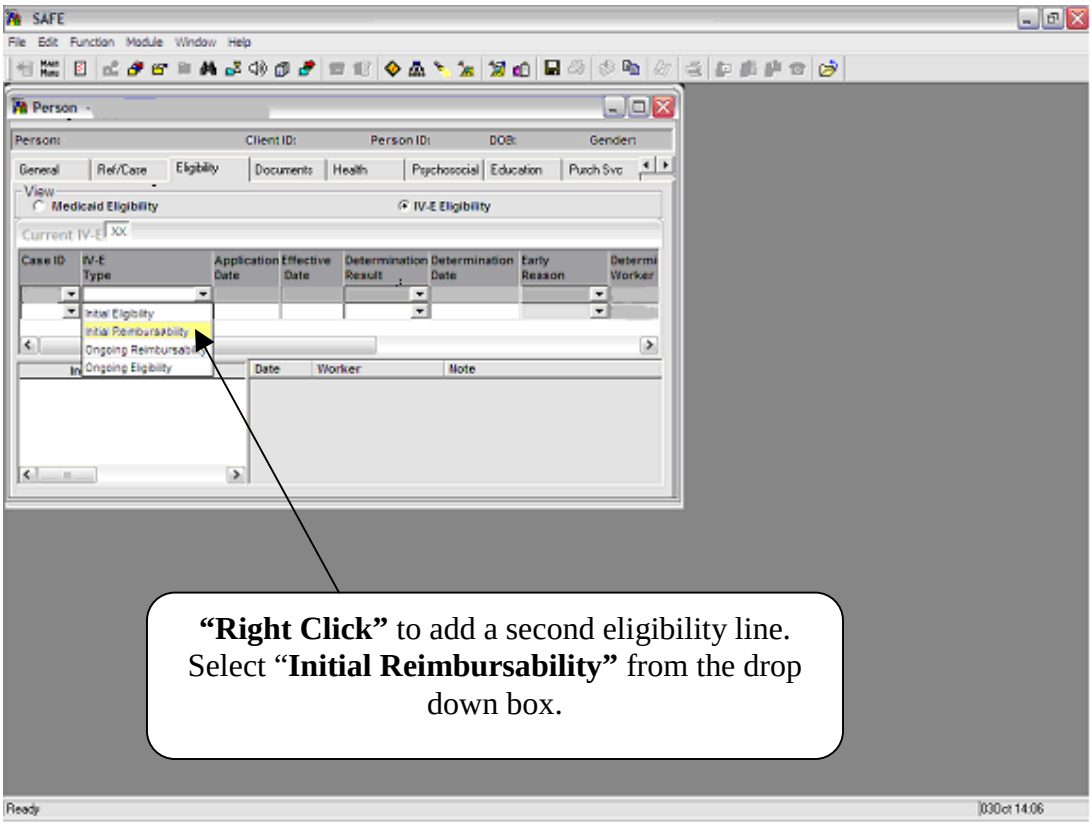


SAVE and Close Eligibility Screen

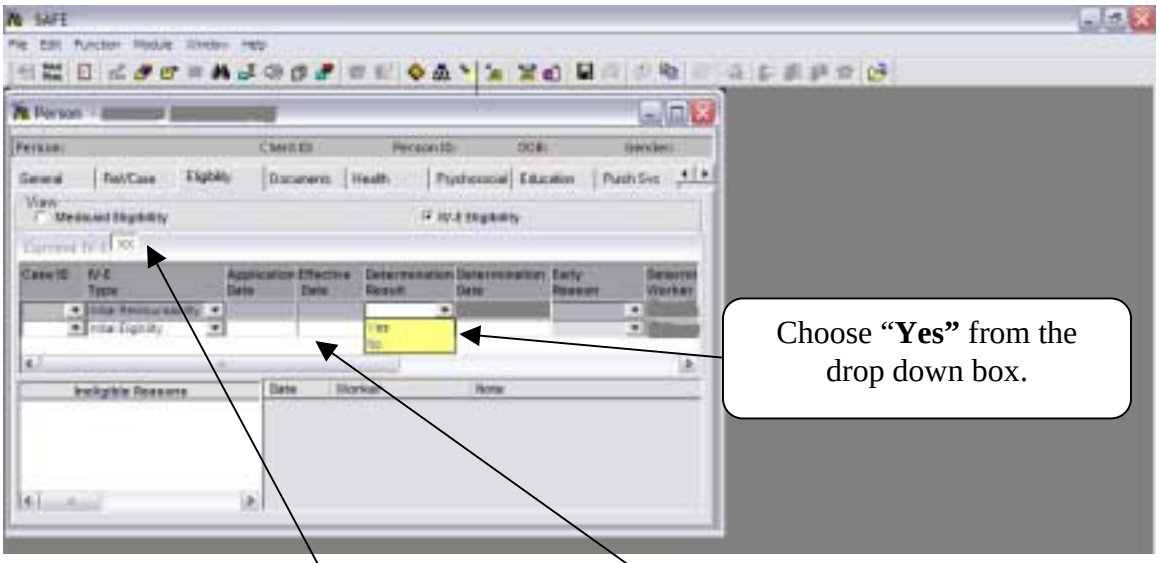
How to Proceed if the Initial Eligibility Determination is "YES"







"Right Click" to add a second eligibility line. Select "**Initial Reimbursability"** from the drop down box.



Choose "**Yes**" from the drop down box.

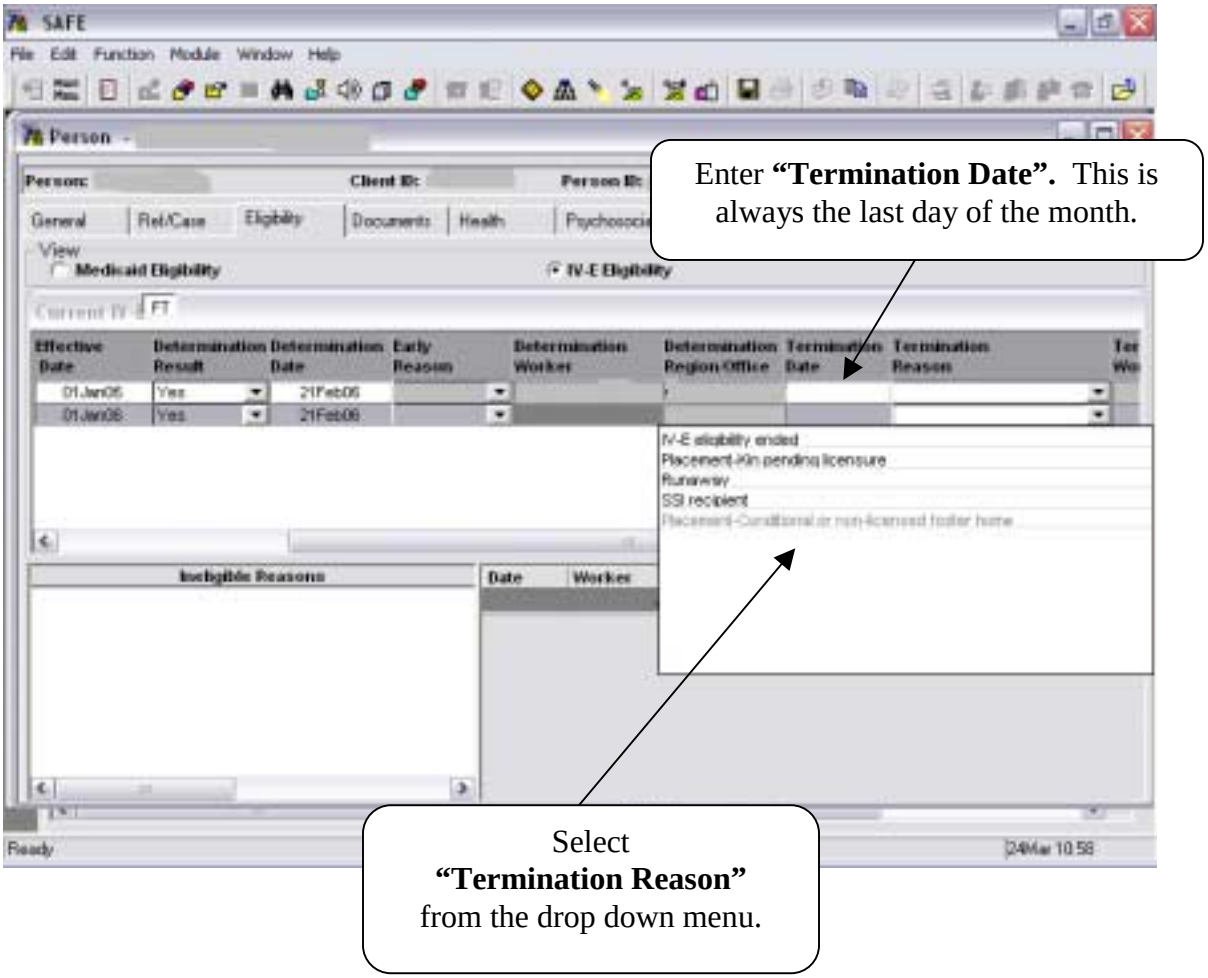
Enter the **"Effective Date".**

- **FT= IV-E Eligible and IV-E Reimbursable.**
- **FE= IV-E Eligible, not IV-E Reimbursable.**
- **NO= Not IV-E Eligible.**
- **XX= No Eligibility Determination Entered.**

SAVE

- **Add Eligibility Note.** See page 35 for instructions.

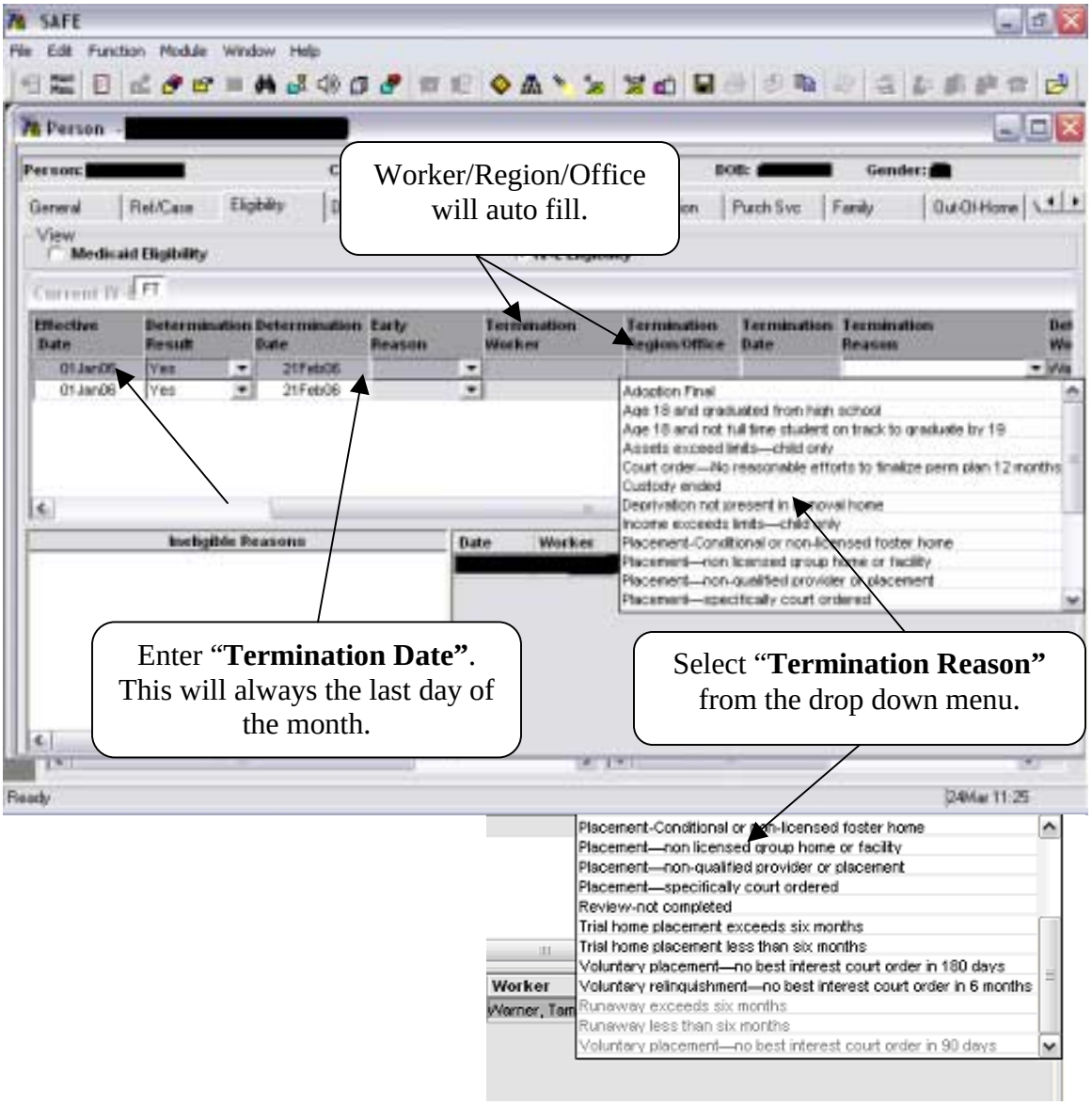
Terminating IV-E Reimbursability



SAVE

- **Add Eligibility Note.** See page 35 for instructions.

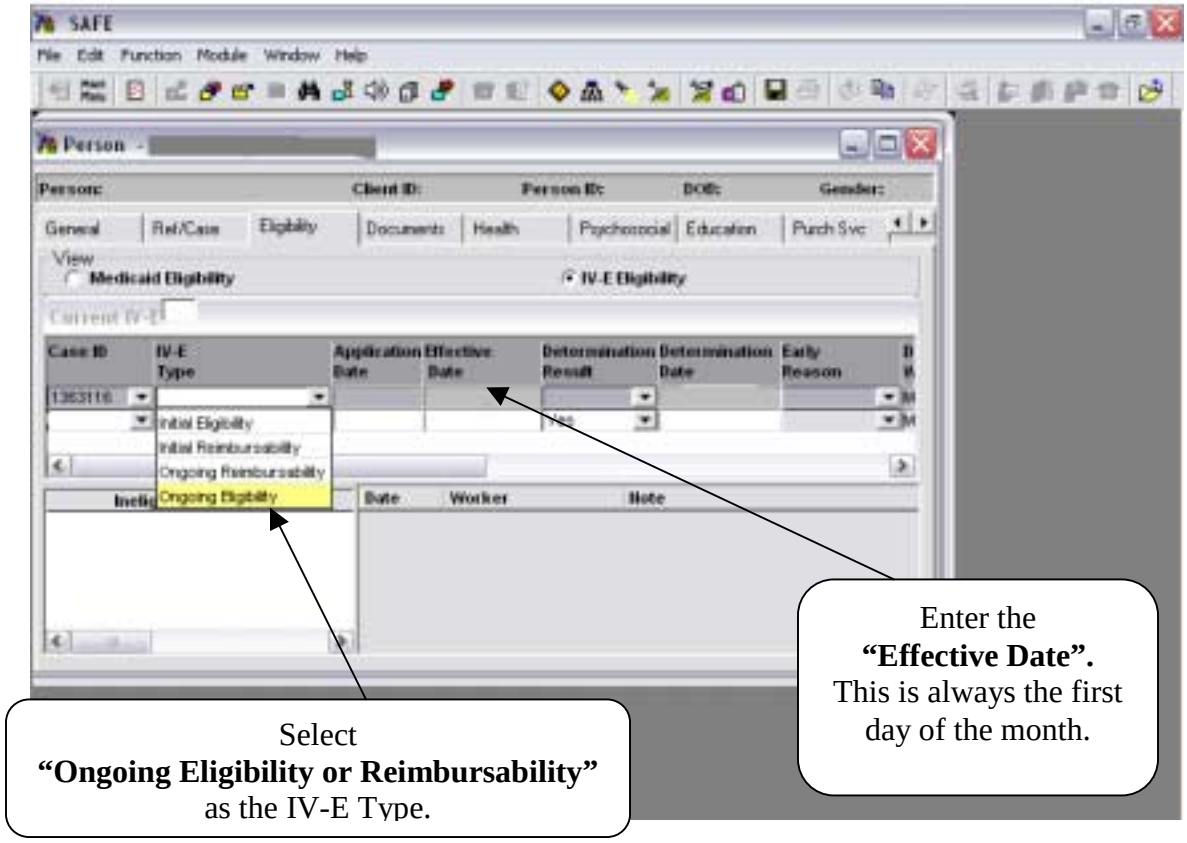
Terminating IV-E Eligibility



SAVE

- **Add Eligibility Note.** See page 35 for instructions.

Adding Ongoing Eligibility or Reimbursability



SAVE

- **Add Eligibility Note.** See page 35 for instructions.

****REMEMBER****

Eligibility notes should be added to SAFE in the note section anytime you take an action on a IV-E case.

This includes:

- **Initial Determination.**
- **Reviews.**
- **Changes.**
- **Closure.**