



Model Tribal System

Designed By Tribes, For Tribes

Quick Reference Guide

Case Setup

Version 1.7

April 7, 2014



**Department of Health and Human Services
Administration for Children and Families
Office of Child Support Enforcement**

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REVISION HISTORY			
Version	Date	Description of Change	Approval
1.0	12/09/2013	Original Document -Based on MTS181	Joseph Bodmer, Director, Division of State and Tribal Systems
1.1 – 1.5	01/27/2014	Format Changes	Joseph Bodmer, Director, Division of State and Tribal Systems
1.6	03/27/14	DCC Edits	CP
1.7	04/07/2014	508 Compliance	CP

1 Overview of Case Setup

This quick guide is designed to be a desk reference for caseworkers who are responsible for the entry of cases into the Model Tribal System (MTS). The contents are a high-level overview of the more detailed instructions found in the MTS Caseworker's Guide.

In general, the case setup process involves creating the participants on a case and then building the case itself. There are two main types of cases: Child Support (or IV-D cases) and Temporary Assistance for Needy Families (TANF) cases. We will cover the creation of each separately.

2 Creating IV-D Cases

There are 2 main steps in creating a new IV-D case.

Step 1 – Create participants on the case

Step 2 – Create IV-D Case

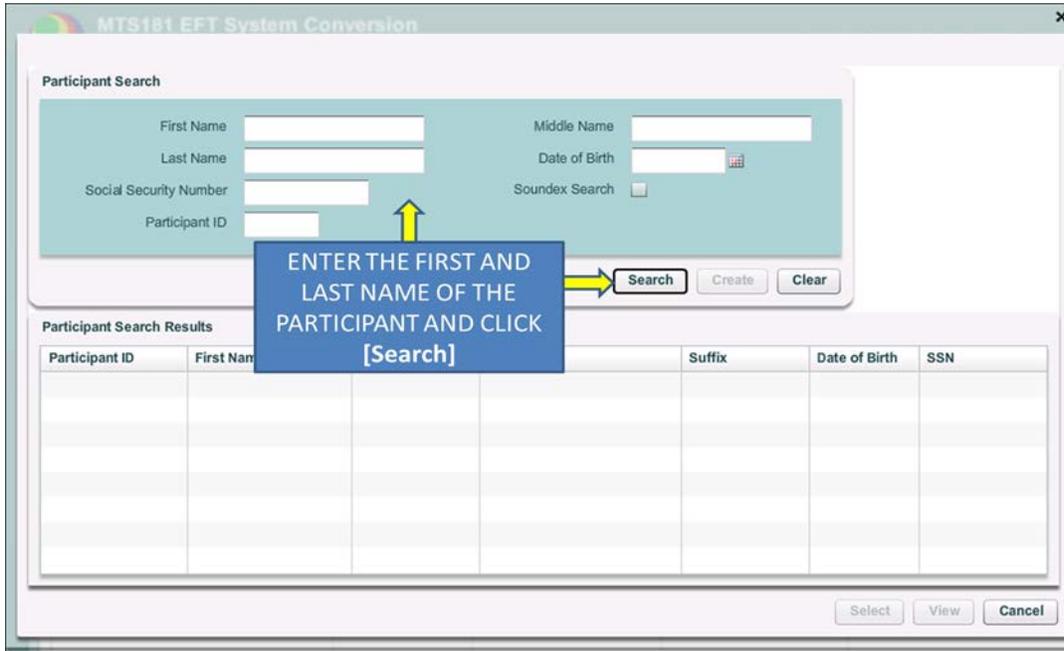
Step 1 – Create Participants on the Case

Prior to creating your participants on the MTS you must first search for each one using the “Participant Search”.

1. Login as a Caseworker and select Participant Search from the Case Management menu.

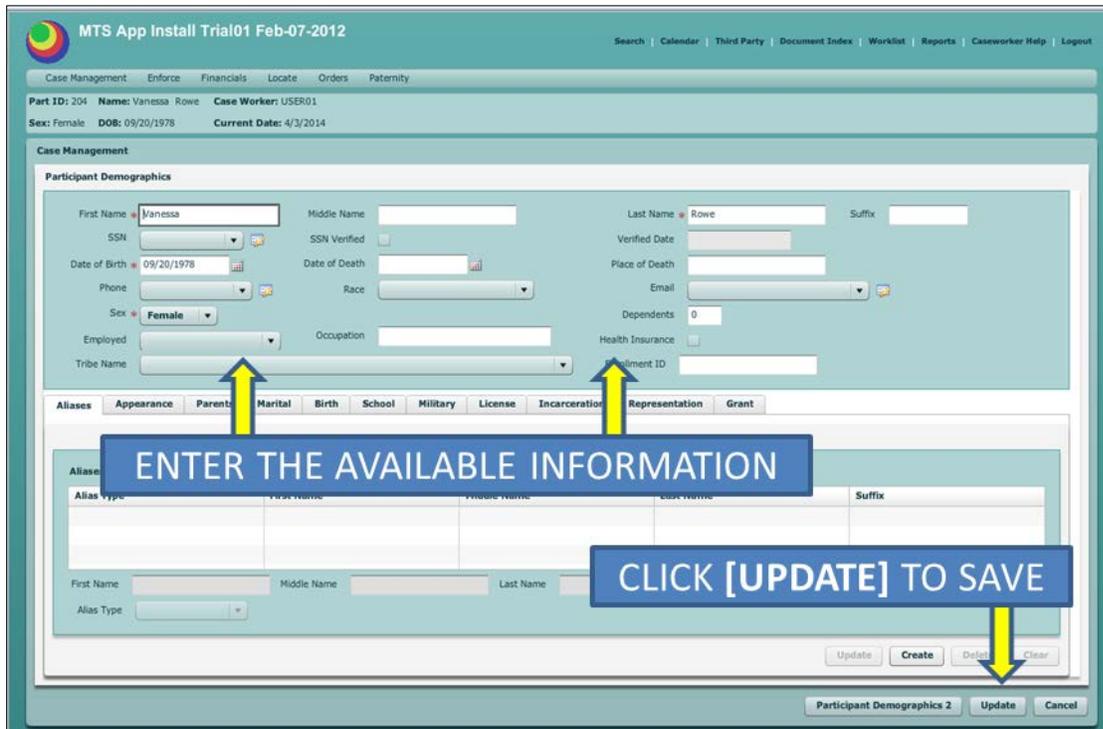


2. Enter the first and last name of the participant you are going to add.
3. Click **[Search]** to conduct a search for the participant.



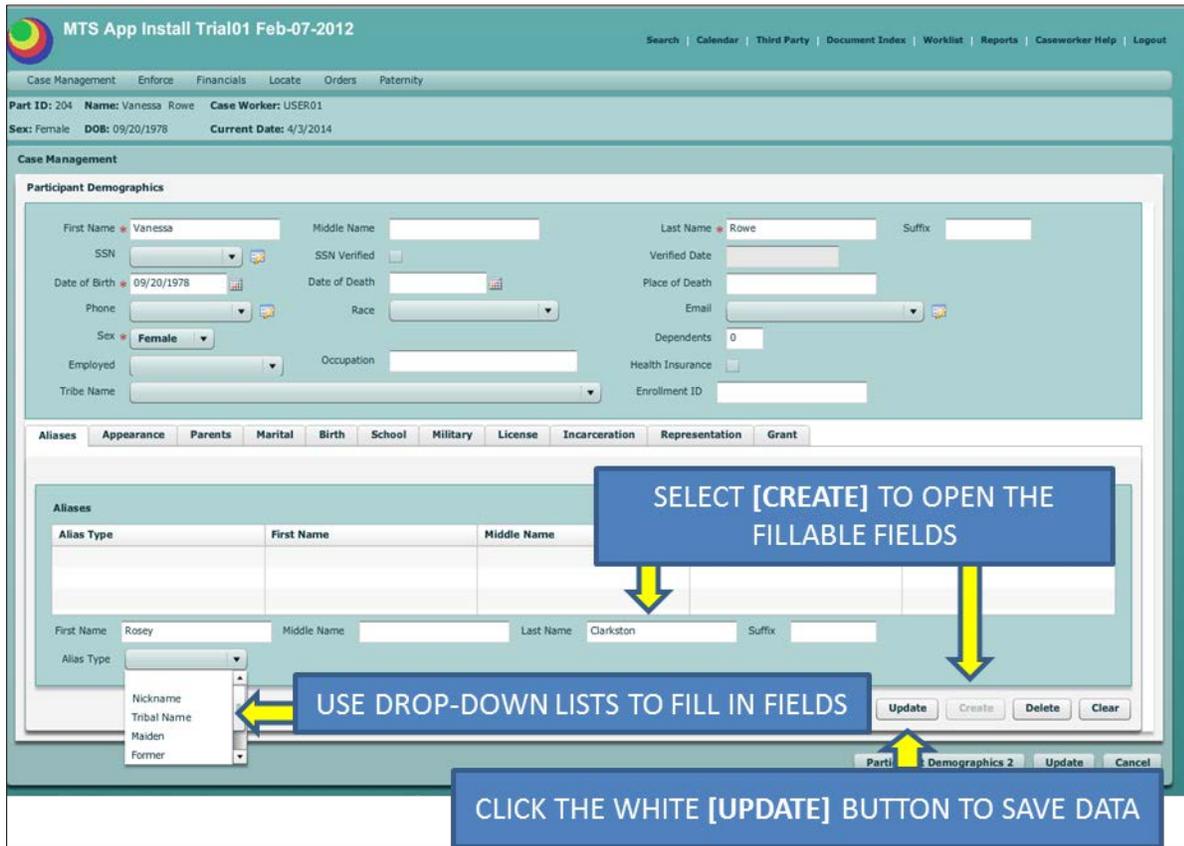
4. After the search, the **[Create]** button will be enabled. If your participant is already on the system, click **[Select]** to check his or her information. If your participant is not on the system, click **[Create]**.

5. To create the participant, you must enter at least the First Name, Last Name, Date of Birth, and Sex of the participant. Fill in as much information as you have available.
6. Click the **[Update]** button at the bottom of the screen to save the data.



7. Click on each tab to fill out the information according to your tribal procedure and the information available.

8. For tabs that support multiple entries, select **[Create]** to open the data fields. To save the data, click the **[Update]** button at the bottom of the tab.



9. Some tabs have simple fillable fields that are already open. Fill in the needed information.
10. Select **[Update]** on the bottom of the screen to save data.

11. When you are finished with the first set of tabs, select **[Participant Demographics 2]** to open the remaining tabs.

12. Select each tab to complete needed information.

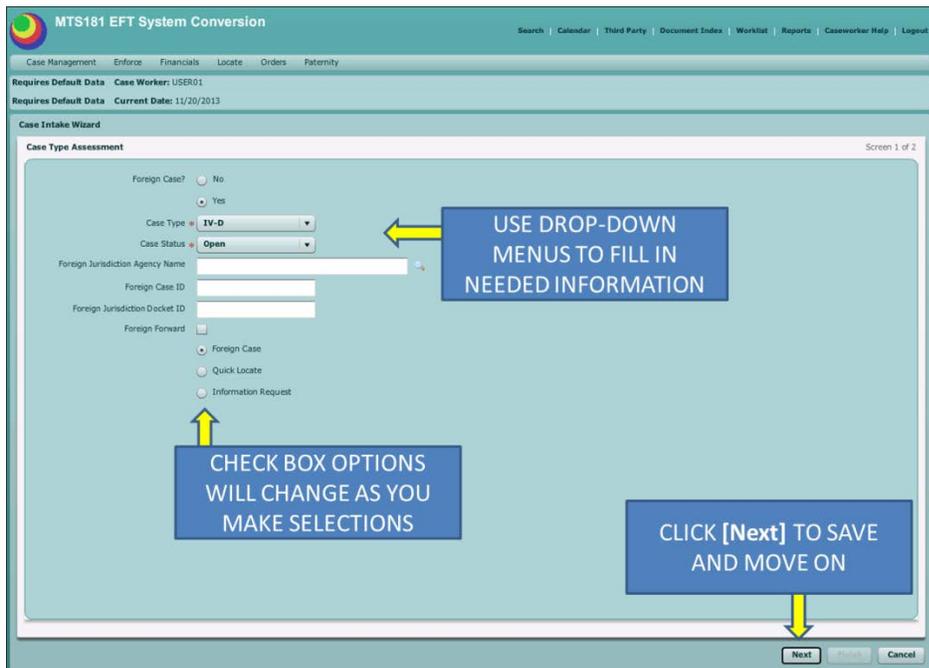
13. Click **[Return]** to go back to Participant Demographics 1.
14. Repeat steps 1-13 for each individual on the case. Each case must have at least one active noncustodial parent (NCP), one active custodial parent (CP), and one child.

Step 2 – Create the IV-D Case

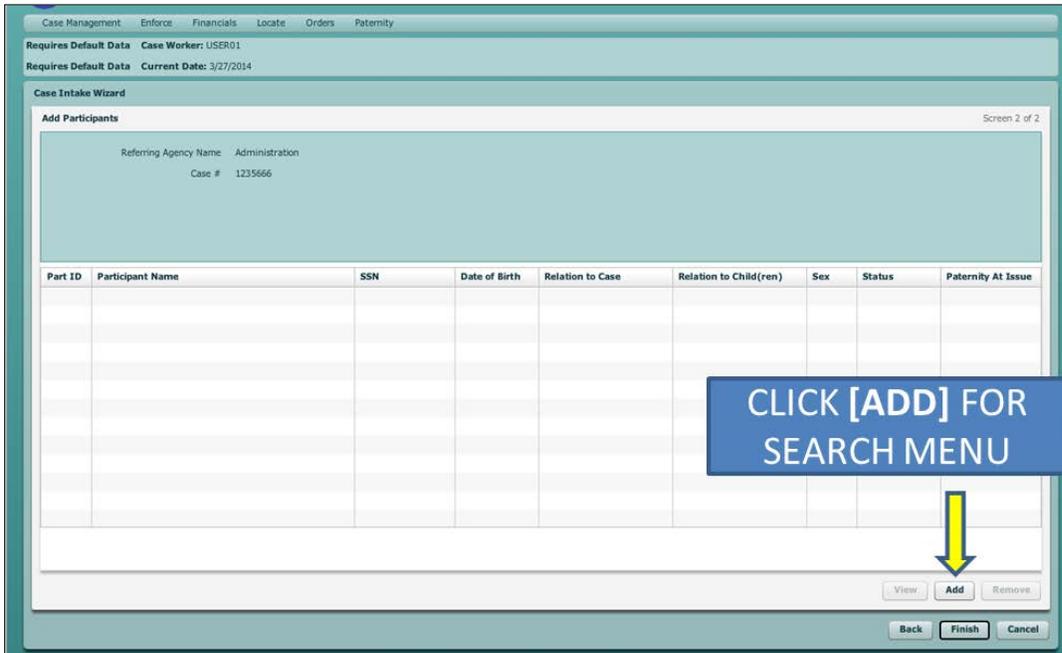
1. Login as a Caseworker or Financial Worker.
2. Select Case Setup from the Case Management menu to open the Case Intake Wizard.



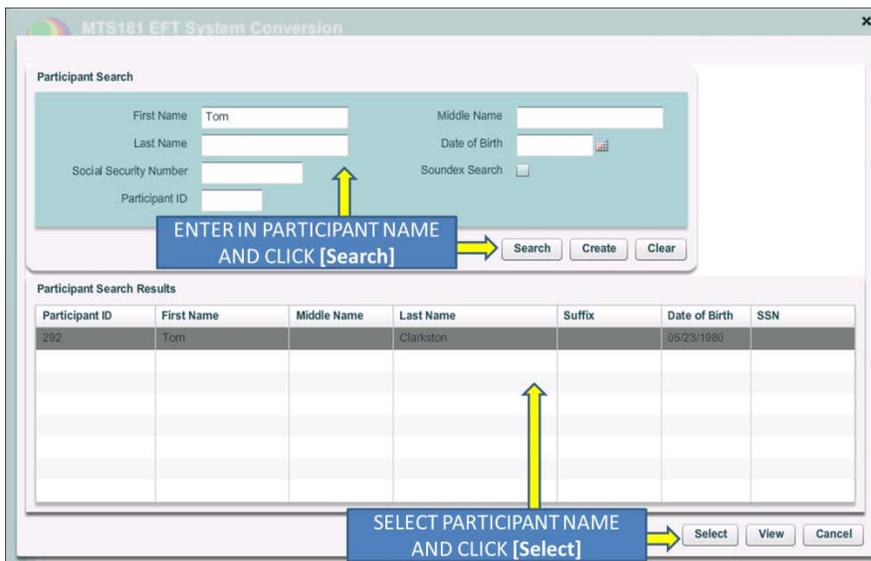
3. Click the Tribal Case No button for foreign cases. Foreign cases will require some additional information from the foreign jurisdiction. If the case is a foreign case, click the Foreign Forward checkbox to send all payments to the foreign agency for distribution.
4. Use drop-down menus to fill in the required information.
5. Click **[Next]** to save and move to Add Participants screen



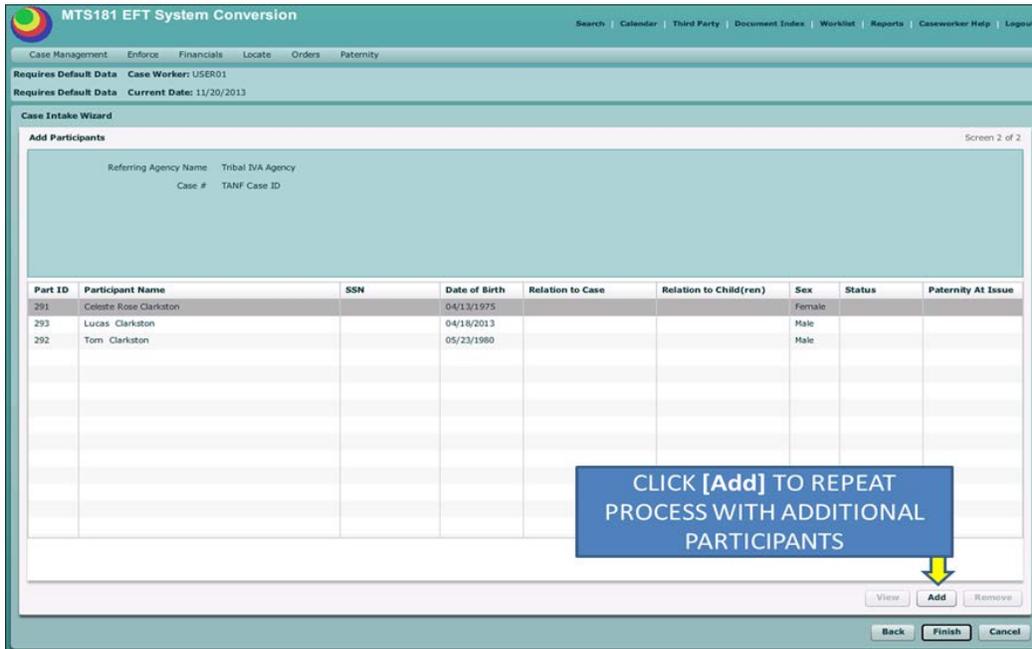
6. Click **[Add]** to bring up the Search menu to find participants to be added to the case.



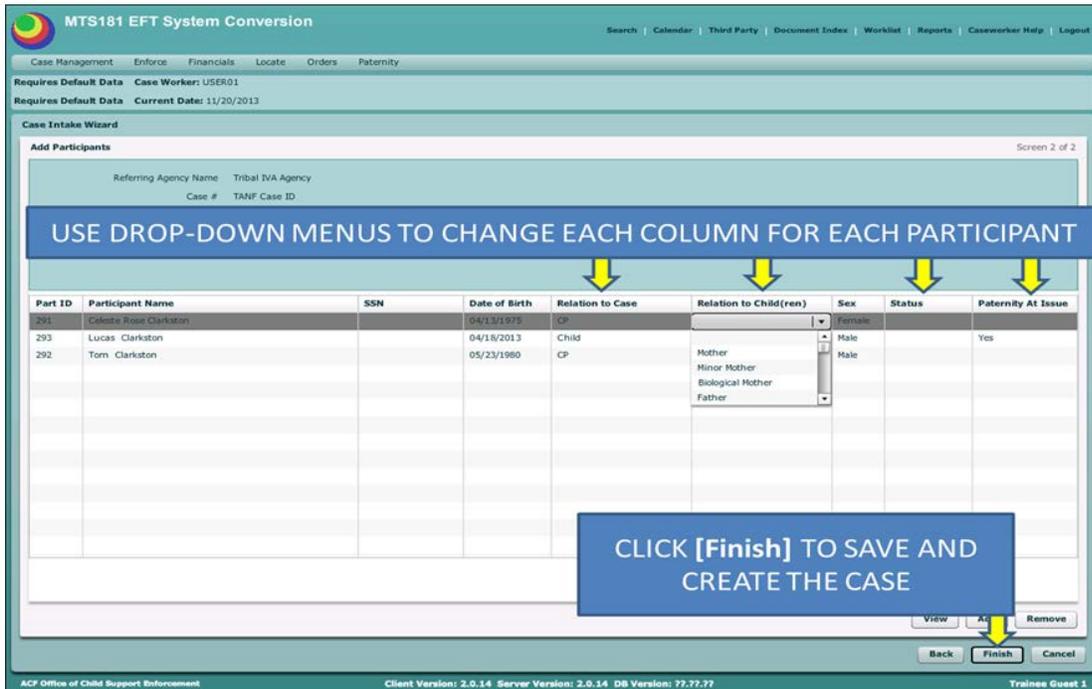
7. Search for your participant.
8. Highlight your participant and click **[Select]** to add the participant to the case.



- On the Case Intake Wizard screen click **[Add]** to repeat steps 6-8 and add remaining participants.

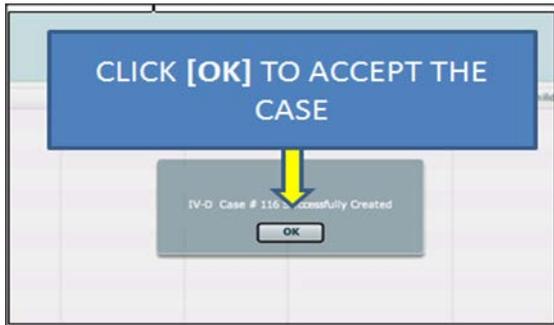


- Use the drop-down boxes to enter the Relation to Case, Relation to Child(ren), and Status columns for each participant. Each case *must have* one active NCP, CP and Child in order to be created.



- Click **[Finish]** to create the case.

12. Click **[OK]** to accept the newly created case.



3 Creating TANF (IV-A) Cases

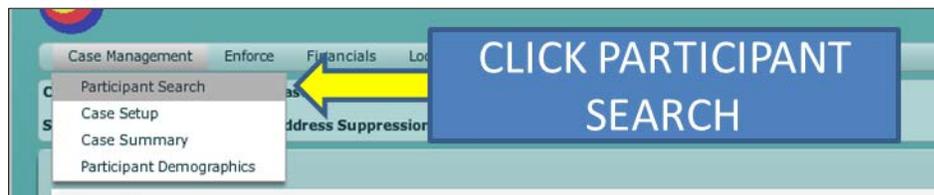
The process for creating a IV-A case is very similar to that for a IV-D case. However, the CP on the case must have a TANF grant entered in order to successfully create a IV-A case.

Step 1 – Create a TANF grantee

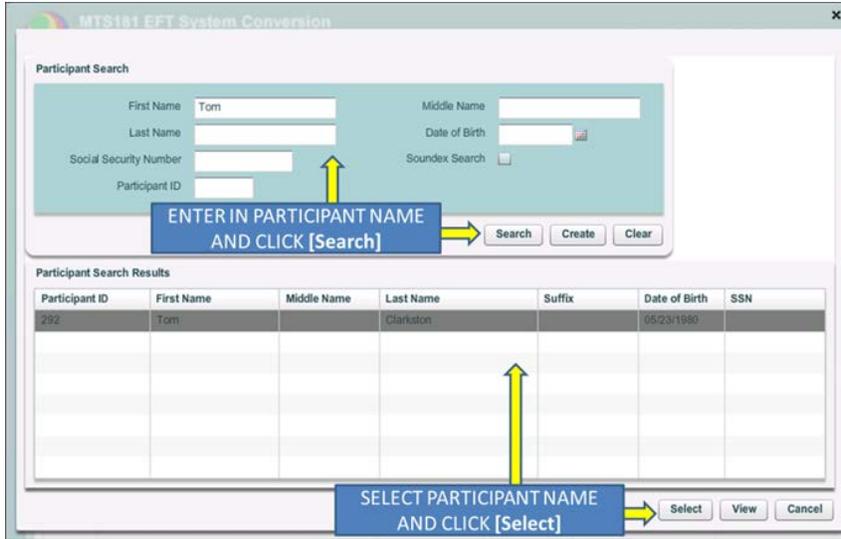
Step 2 – Create a TANF case

Step 1- Create a TANF Grantee

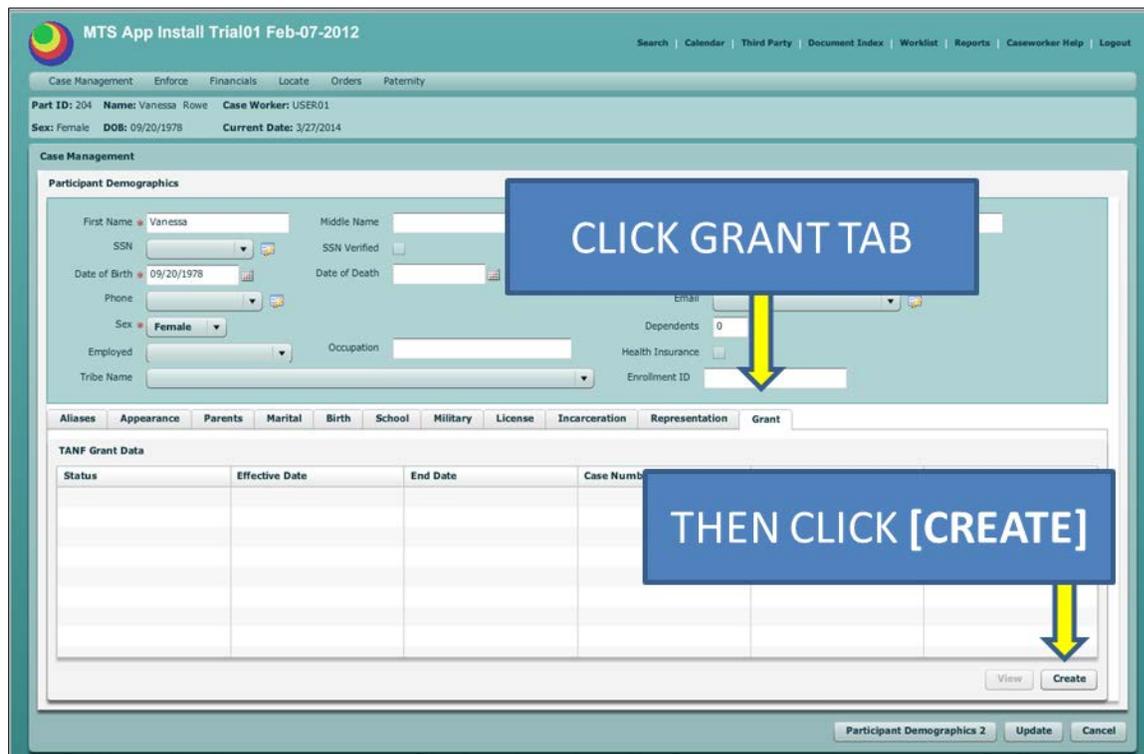
1. Follow steps in the IV-D section to create the individual participant.
2. Select Participant Search from the Case Management menu.



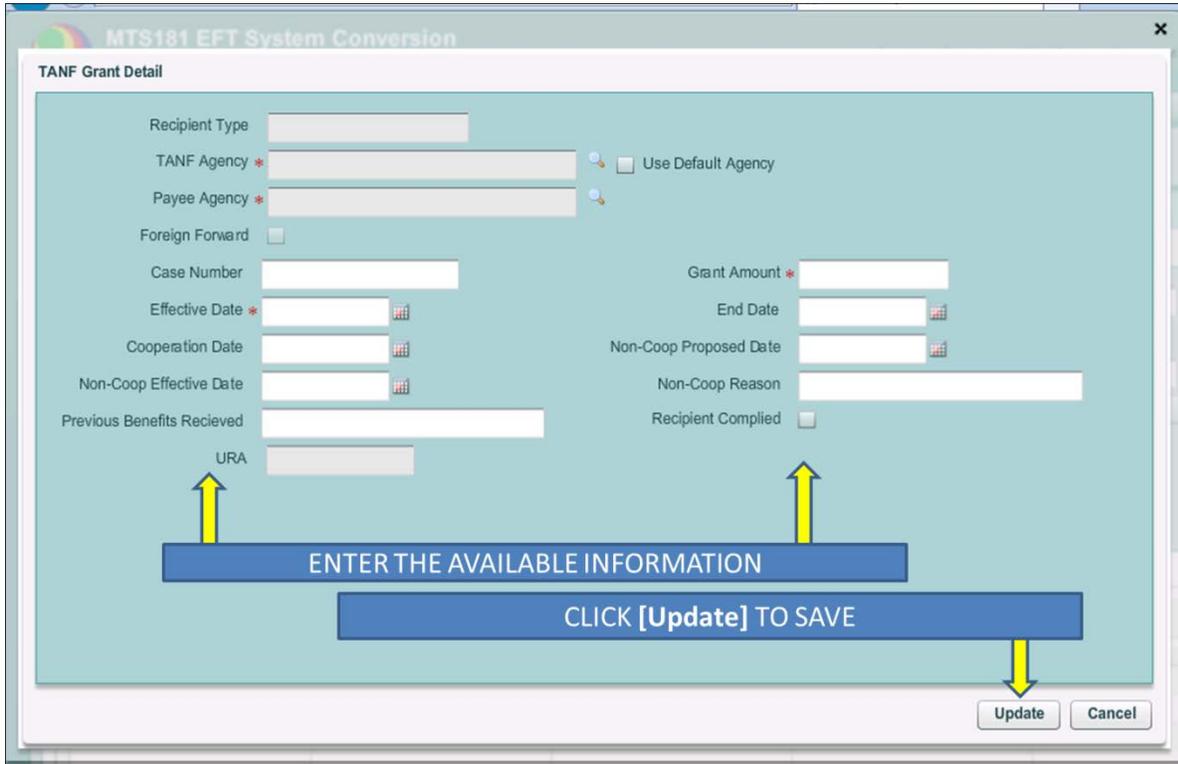
3. Search for the participant who is receiving the TANF grant.
4. Highlight your participant and click **[Select]**.



5. Click on the Grant tab to add the grant *to the individual*. Grants *cannot be* added to the case – they must be associated with a specific individual.
6. Click **[Create]** to open the TANF Grant Detail screen.



7. Enter in all required TANF Grant Detail screen..
8. Click **[Update]** to save.



9. Click **[OK]** to accept grant information.



Step 2 - Create a TANF Case

1. Follow the steps in the IV-D section to create the case using the Case Wizard screens.
2. Use the drop-down boxes to change the relationships columns for each participant. The TANF grantee should be the CP.
3. Click **[Finish]** to create the case.

MTS181 EFT System Conversion

Case Management | Enforce | Financials | Locate | Orders | Paternity

Requires Default Data Case Worker: USER01

Requires Default Data Current Date: 11/20/2013

Case Intake Wizard

Add Participants Screen 2 of 2

Referring Agency Name: Tribal IVA Agency
Case #: TANF Case ID

USE DROP-DOWN MENUS TO CHANGE EACH COLUMN FOR EACH PARTICIPANT

Part ID	Participant Name	SSN	Date of Birth	Relation to Case	Relation to Child(ren)	Sex	Status	Paternity At Issue
291	Celeste Rose Clarkston		04/13/1975	CP		Female		
293	Lucas Clarkston		04/18/2013	Child		Male		Yes
292	Tom Clarkston		05/23/1980	CP		Male		

CLICK [Finish] TO SAVE AND CREATE THE CASE

View Add Remove

Back Finish Cancel

ACF Office of Child Support Enforcement Client Version: 2.0.14 Server Version: 2.0.14 DB Version: ???.???.? Trainee Guest 1

4. The TANF grant popup will display information about the TANF grant.
5. Click **[No]** to indicate you do not want to make changes to the TANF grant information.

SSN Date of Birth Relation to Case Relation to Child(ren)

Mother

Biological Father

TANF Grant

Celeste Clarkston has a current grant with the following information:

Agency: Tribal IVA Agency

Payee Agency:

Case Number: 1200

Grant Amount: 1200

Effective Date: 06/09/2013

End Date:

Update grant for participant Celeste Clarkston?

Yes No

CLICK [No] TO INDICATE YOU DO NOT WISH TO MAKE CHANGES TO THE TANF GRANT

6. You will then receive a confirmation popup.
7. Click **[OK]** to accept the case.

