

# Florida Department of Children & Families



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## SAMH TANF User Manual

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Effective Date: 09/18/23  
Version 1.0



# SAMH TANF User Manual

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## 1. Document History

Version	Description	Author(s)	Last Updated
0.1	Created initial version	Tamara Anderson	8/7/2023
0.2	Updated with OITS feedback	Leslie Gomez	8/24/2023
0.3	Updated with SAMH feedback and SME feedback	Leslie Gomez	9/14/2023
1.0	Approved by Nichole Fusilier	Leslie Gomez	9/18/2023

## 2. Glossary

Abbreviation \Term	Description
AFDC	Aid to Families with Dependent Children
AMH	Adult Mental Health
ASA	Adult Substance Abuse
CHIP	Children's Health Insurance Program
CMH	Child Mental Health
CSA	Child Substance Abuse
D/C	Discharge
DCF	Department of Children and Families
DOB	Date of Birth
EA	Emergency Assistance
ESS	Economic Self Sufficiency
F.S.	Florida Statute



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Abbreviation \Term	Description
FPL	Federal Poverty Level
FY	Fiscal Year
HHS	Department of Health and Human Services
HQ	DCF Headquarters
ICD	International Statistical Classification of Diseases and Related Health Problems
JOBS	Job Opportunities and Basic Skills Training
LDAP	Lightweight Directory Access Protocol (LDAP) is a protocol that applications can use to speak to directory services such as Active Directory
FY	Fiscal Year
ME	Managing Entity
Pseudo-SSN	The pseudo-SSN is used when the client's Social Security Number is unknown. The pseudo-SSN must be entered in the following format. The first three characters are the client's first, middle, and last initials. The last 6 characters are the client's date of birth. For instance, if Jane Margaret Doe has a date of birth of January 2, 1984, her pseudo-SSN would be JMD-01-0284. If middle initial is unknown, please enter an X. If pseudo-SSN is already in use, alter the two digits of the birthday to a number greater than 31.
SAMH	Substance Abuse and Mental Health
SAMHIS	Substance Abuse and Mental Health Information System
SSI	Supplemental Security Income
SSDI	Social Security Disability Insurance
SSN	Social Security Number
TANF	Temporary Assistance for Needy Families
TCA	Temporary Cash Assistance
TDF	TANF Diversion Families

### 3. Document Purpose

The purpose of this user manual is to help users navigate and utilize the TANF application. The TANF application enables Providers, subcontracted with a Managing Entity (ME), to submit participant TANF eligibility information to their Managing Entity for review within a controlled database. It also enables the Florida Department of Children and Families Headquarters (DCF HQ) staff to review and analyze the data to create Federal and State reports as needed.

### 4. Background

Congress created the TANF block grant through the Personal Responsibility and Work Opportunity Reconciliation Act of 1996, which replaced previous welfare programs known as Aid to Families with Dependent Children (AFDC), Job Opportunities and Basic Skills Training (JOBS) and Emergency Assistance (EA). TANF provides funding to states to help move recipients into work. TANF is a funding stream that provides federal funds to states, territories and tribes each year to accomplish the purposes of TANF. It is not a separate program inside of DCF.



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Two departments in DCF manage the TANF funding. The Office of Economic Self-Sufficiency (ESS) assists families with temporary cash assistance benefits (TCA). This provides cash payments, vouchers, and other forms of benefits to meet a family's ongoing basic needs such as food, shelter, clothing, utilities, household goods, personal care items, and general incidental expenses as authorized in Section 414.045, F.S.

The Office of Substance Abuse and Mental Health (SAMH) TANF funding is designed to provide substance abuse and mental health services to Temporary Cash Assistance (TCA) participants and to TANF Diversion Family (TDF) participants.

### Temporary Cash Assistance (TCA)

SAMH provides participants who have applied for or are receiving TCA with substance abuse and mental health services to avoid long-term welfare dependency and stabilize families so that children can be cared for in their own homes or in the homes of relative, and so that families can be self-sufficient, as provided under Section 414.1585.F.S.

### SAMH TANF Diversion Family (TDF)

SAMH also uses TANF funding to assist families who are not eligible for TCA but meet other criteria by providing diversionary substance abuse and mental health services. This is for families who are at-risk of welfare dependency due to a substance use disorder or a mental health disorder. It is intended to provide services and one-time payments to assist families in avoiding welfare dependency and to stabilize families, so that children can be cared for in their own homes or in the homes of relatives and so that families can be self-sufficient, as provided under Section 414.1585, F.S. Additionally, a family must be at or below 200% of the federal poverty level, and must be meet one of the following criteria:

- a. A parent or relative caretaker with one or more minor children living in the home;
- b. A non-custodial parent with a court order to pay child support;
- c. A pregnant woman;
- d. A family whose children have been removed from the home by the Child Welfare Program (where the service is included or added to the active family reunification goals in the case plan);  
or
- e. A Supplemental Security Income (SSI) recipient or a Social Security Disability Insurance (SSDI) recipient.

The Federal Poverty Level (FPL) is a measure of income issued every year by the Department of Health and Human Services (HHS). The FPL measures assist in determining eligibility for programs and benefits, including savings on Marketplace health insurance, and Medicaid and Children's Health Insurance Program (CHIP) coverage. HHS updates the FPL yearly.

## 5. TANF Roles

There are three categories of TANF users, Department of Children and Families (DCF), TANF Specialists (Managing Entity) and Providers, that can access the TANF application.

### 5.1. Provider

These users submit the client's TANF applications. The application assists in determining if the client meets the eligibility requirements for TANF. The user can view, modify, and submit a record pertaining to their Provider but cannot access data from other providers.



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### **5.2. TANF Specialist**

TANF Specialists are the Managing Entity users who review pending applications to verify there are no issues within the client's TANF notification. These users can view, and approve or reject notifications for their circuits, but cannot access notifications for other providers that are not within their purview.

### **5.3. DCF Admin**

DCF users with an Admin role can review and analyze TANF data. They can view any data within the system. These users also perform the administration of the user accounts and role assignments in the system and can delete records as requested.

## **6. Creating User Accounts**

Managing Entity and subcontracted providers will submit requests for TANF user accounts to their Managing Entity Data Liaisons. The TANF access packet includes a SAMH Database Access Request Form, an Access Confidentiality and Nondisclosure Agreement Form, and current DCF Security Awareness and HIPAA Information and Action training certificates. The trainings may be accessed at -<http://www.myflfamilies.com/general-information/dcf-training>. DCF employees may submit their TANF access request packets directly to the DCF Help Desk at [dcf.helpdesk@myflfamilies.com](mailto:dcf.helpdesk@myflfamilies.com). DCF employees should submit the SAMH Database Access Request Form, a Security Agreement Form (in lieu of the Access Confidentiality and Nondisclosure Agreement Form), and their DCF Security Awareness and HIPAA training certificates.

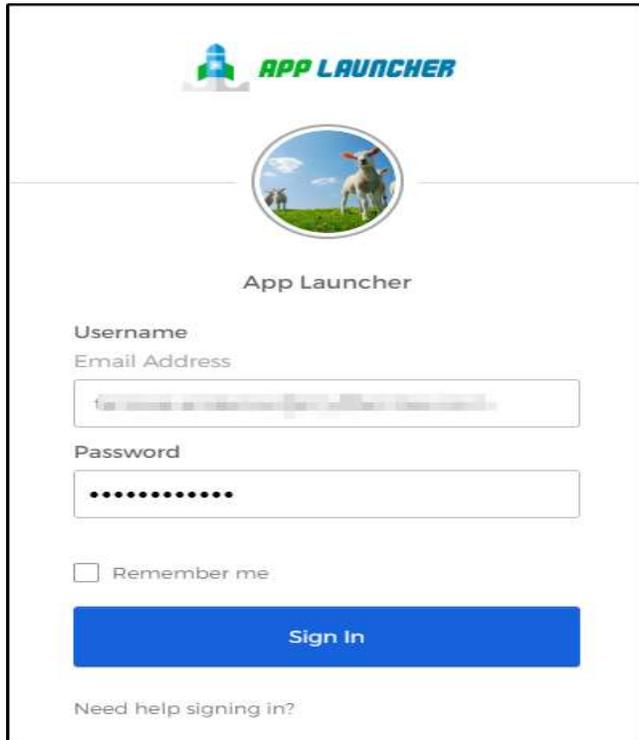
Once all information has been received by the DCF Administrator, the TANF application user accounts will be created, and the service ticket reassigned to request OKTA user accounts be created. When the OKTA account has been created, the Data Liaisons will be notified via email by the DCF Administrator, and instructions will be sent to the new user by the Data Liaison regarding OKTA user account setup and TANF application access.

Additional information is available on the [SAMH-TANF](#) website.

## **7. TANF Sign In**

Users will be provided with the URL to sign into OKTA APP Launcher to access the TANF application using an email and password combination.

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The screenshot shows the 'APP LAUNCHER' login interface. At the top, there is a logo with a blue and green icon and the text 'APP LAUNCHER'. Below the logo is a circular image of a cow in a field. Underneath the image is the text 'App Launcher'. The login form includes the following elements:

- Username** label above the 'Email Address' input field.
- Email Address** label above the input field.
- Password** label above the input field.
- A checkbox labeled 'Remember me'.
- A blue 'Sign In' button.
- A link labeled 'Need help signing in?' below the button.



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After a user has successfully logged into TANF, the privacy notification will appear. After the user has read the notification, they can either select the Accept button or exit out of the application.

By logging in to the SAMH Temporary Assistance for Needy Families (TANF) Application, I understand that I have been authorized by the Florida Department of Children and Families to view information that may be sensitive and/or confidential.

I understand that upon viewing/receiving this information it becomes my responsibility to provide continued protection of the information, to not disclose the information to any unauthorized person or persons, and to use the information in only the authorized manner agreed upon, and to destroy the information after the purpose for its collection has been fulfilled.

Furthermore, I understand that my violation of this agreement and/or unauthorized use of this application may result in a state or federal crime being committed, which could lead to fines and/or imprisonment for others and myself.

[Accept](#)

## 8. Home Page

The Home Page will contain links for Clients, Notifications and Reports. The home page will also show any messages that have been sent to a user that are related to notifications.

Users can view the contents of the message by clicking on the message Subject.

TANF Home Clients Notifications Reports Contacts TestProvider\_TANF TANF

Welcome, TestProvider\_TANF TANF

**My Messages**

Subject :	Related Notification :	Date Sent :	Sent By :	Status :
Message regarding TANF Notification 70	70	08/18/2023 02:11 PM	TestME_TANF@myflfamilies.com	Read
Message regarding TANF Notification C18-1196	1196	08/22/2023 12:11 PM	TestME_TANF@myflfamilies.com	Read
Message regarding TANF Notification C18-76	76	08/21/2023 02:25 PM	TestME_TANF@myflfamilies.com	Read

1 to 3 of 3 items

\* Screenshot depicts created test data

The contents of the message will be displayed under the sender's name.



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TANF Home Clients Notifications Reports Contacts TT TestProvider\_TANF TANF

Welcome, TestProvider\_TANF TANF

My Messages

Message regarding TANF Notification 70

TT TestME\_TANF TANF Aug 18 02:11 PM

Update the household income and resubmit

[← Back](#)

\* Screenshot depicts created test data

Users can access the notification by clicking on the Related Notification link.

TANF Home Clients Notifications Reports Contacts TT TestProvider\_TANF TANF

Welcome, TestProvider\_TANF TANF

My Messages

Subject :	Related Notification :	Date Sent :	Sent By :	Status :
Message regarding TANF Notification 70	70	08/18/2023 02:11 PM	TestME_TANF@myflfamilies.com	Read
Message regarding TANF Notification C18-1196	1196	08/22/2023 12:11 PM	TestME_TANF@myflfamilies.com	Read
Message regarding TANF Notification C18-76	76	08/21/2023 02:25 PM	TestME_TANF@myflfamilies.com	Read

1 to 3 of 3 items

\* Screenshot depicts created test data



# SAMH TANF User Manual

## 9. Clients

All users can view clients, based upon their role, by selecting the Clients link at the top of the home page.

Advanced Filters

Client Name	DOB	Last 4 of SSN	Client ID	Provider
Harrell, Ginny	09/15/2000	1234	SAMH Headquarters Client	SAMH Test Provider (58-1234567)
Choo, Jimmy	09/15/2000	5155		SAMH Test Provider (58-1234567)
Hill, Margie	08/19/1988	5555		SAMH Test Provider (58-1234567)

1 to 4 of 4 items

\* Screenshot depicts created test data

### 9.1. Clients Page

DCF users can see all Clients displayed that have been entered in the TANF application. Providers can only see clients displayed which they have entered. TANF Specialists will be able to see clients displayed whose notifications were submitted by their Managing Entity's subcontracted providers.

All columns on the Clients page can be sorted. The Client Name column is sorted by the client's first name. Selecting a client's name will open the client's detail information.

### 9.2. Clients Advanced Filters

The Advanced Filters section is collapsed under the basic search field. It allows a user to search and filter by specific criteria, based upon their role. This includes:

- a. First Name
- b. Last Name
- c. Date of Birth
- d. Last 4 of SSN
- e. Client ID
- f. Provider
- g. Managing Entity



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## Clients

[Export Results](#) [+ New Client](#)

Search by Client Name or Client ID

Advanced Filters

Client Name	DOB	Last 4 of SSN	Client Id	Provider
Duck, Dashing	05/25/1995	5335		1st Step Behavioral Health Provider (58-3687123)

## Clients

[Export Results](#) [+ New Client](#)

Search by Client Name or Client ID

Advanced Filters

First Name

Last Name

Date of Birth

Last 4 of SSN

Client ID

Provider

Managing Entity

[Clear](#) [Search](#)

Client Name	DOB	Last 4 of SSN	Client Id	Provider
Duck, Dashing	05/25/1995	5335		1st Step Behavioral Health Provider (58-3687123)
Stone, Sharon	03/31/1999	8741		Miami Behavioral Health Center (98-2543294)

\* Screenshot depicts created test data

### 9.3. Create a New Client Record

Users who have a TANF Provider role can create new client records from the Clients page.

## Clients

[Export Results](#) [+ New Client](#)

Search by Client Name or Client ID

Advanced Filters

Client Name	DOB	Last 4 of SSN	Client Id	Provider
Duck, Dashing	05/25/1995	5335		1st Step Behavioral Health Provider (58-3687123)
Stone, Sharon	03/31/1999	8741		Miami Behavioral Health Center (98-2543294)

\* Screenshot depicts created test data



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All fields marked with an asterisk are required to create a new client record. Any fields that do not have an asterisk, are optional fields.

- a. Provider – A drop down that will list all Providers that are associated with the user. Most users will only have a single provider. Required.
- b. Client ID – Optional.
- c. First Name – Required.
- d. Middle Initial – Optional.
- e. Last Name – Required.
- f. DOB – Required.
- g. SSN – Required. If the SSN is unknown, please use a pseudo-SSN in the following format. The first three characters are the client's first, middle, and last initials. The last 6 characters are the client's date of birth. For instance, if Jane Margaret Doe has a date of birth on January 2, 1984, the pseudo-SSN would be JMD-01-0284. Use an X if the middle initial is unknown. If the pseudo-SSN is already in use, alter the two digits of the birthday to a number greater than 31.
- h. Ethnicity – Drop down. Required
- i. Race – Drop down. Required
- j. Gender – Drop down. Required.

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### New Client

Provider \*

Client Id

First Name \*

Middle Initial

Last Name \*

DOB \*

SSN \*

Ethnicity \*

Race \*

Gender \*

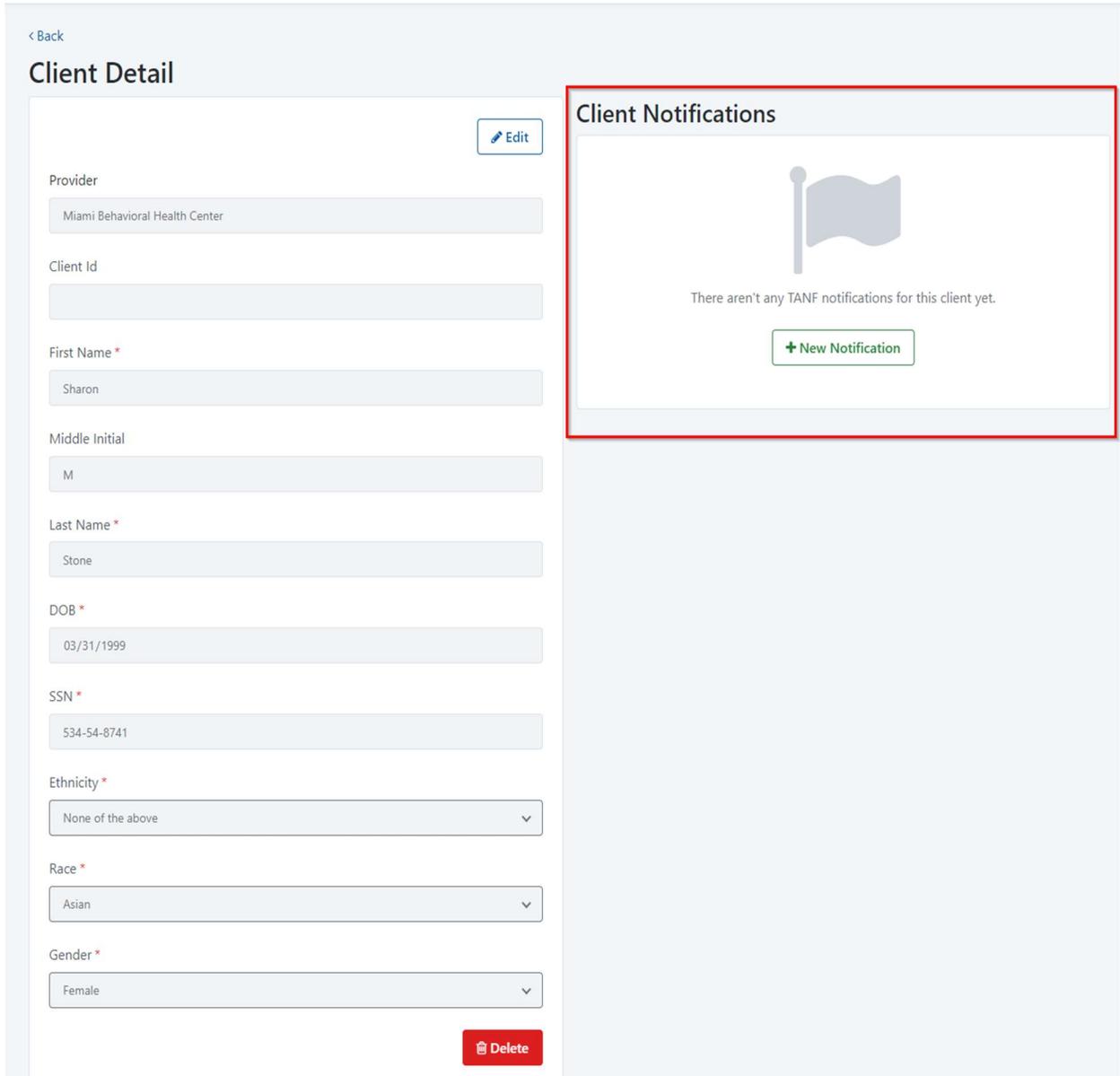
\* Screenshot depicts created test data

Once the New Client record has been saved, the title will change to Client Detail. The user will have the ability to Edit or Delete the Client Detail record if incorrect information was entered or the record was created in error. Changes to Client data, including the SSN, will be updated on the Client record. A duplicate Client record **should not** be created if a new SSN is received. The Client Notifications section will also be visible and allow users to create a client notification.

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## 10. Notifications

TANF Provider users can also create a new Client Notification from within a Client Detail record.



The screenshot shows a web interface for a Client Detail record. On the left is a form with the following fields: Provider (Miami Behavioral Health Center), Client Id (empty), First Name (Sharon), Middle Initial (M), Last Name (Stone), DOB (03/31/1999), SSN (534-54-8741), Ethnicity (None of the above), Race (Asian), and Gender (Female). There are 'Edit' and 'Delete' buttons. On the right is a 'Client Notifications' section with a flag icon and the text 'There aren't any TANF notifications for this client yet.' and a '+ New Notification' button.

\* Screenshot depicts created test data



# SAMH TANF User Manual

## 10.1. Create a New Notification

A new notification will have required fields in five tabs that have to be completed before a notification can be saved as a draft or submitted to the TANF Specialist. The Messages tab will appear after a notification has either been saved as a draft or submitted.

Since a notification is created from within a client detail page, the notification header will contain the client's name and last four of the SSN.

### 10.1.1. Eligibility

- a. Site – Drop down. Required.
- b. Provider – Auto populated based on the provider listed on the Client Detail record.
- c. Managing Entity – Auto populated based upon the Site selected.
- d. EZ Form Signature Date – Required
- e. Service Eligibility Begin Date – Auto populated based upon EZ Form Signature Date
  - i. For Recertification, the date will auto populate based upon the first day of the recertification period.
- f. Receiving Medicaid – Check box. Optional

**New Notification for Sharon Stone - 8741** Unsaved

**Eligibility**

Address	Site *	Provider	Managing Entity
Participant	Glorious Days	Miami Behavioral Health Center	Central Florida Cares Health System
Household	EZ Form Signature Date *	Service Eligibility Begin Date *	Receiving Medicaid
Assistance	06/23/2023	06/23/2023	<input type="checkbox"/>

[Save Draft](#) [Submit](#)

\* Screenshot depicts created test data



# SAMH TANF User Manual

## 10.1.2. Address

- a. Address Line 1 – Required.
- b. Address Line 2 – Optional.
- c. City – Required.
- d. State – Auto populated. Required.
- e. Zip – Required.
- f. County – Drop down. Required.

**New Notification for Sharon Stone - 8741** Unsaved

**Address**

Address Line 1 \*  Address Line 2

City \*  State \*  Zip \*  County \*

[Save Draft](#) [Submit](#)

\* Screenshot depicts created test data



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## 10.1.3. Participant

- a. Participant Type – Drop down. Required
- b. Child Only – Check box. Optional.
- c. If Child, name of parent/caregiver – Optional.
  - i. Required if Child Only is selected.
- d. Relationship to Child – Optional.
  - i. Required if Child Only is selected.
- e. Referral Focus – Drop down. Required.
  - i. ICD-10 drop downs will appear based upon the Referral Focus option chosen. Scroll or search by full/partial word or code number. A TANF Provider user can choose up to three Mental Health and/or three Substance Abuse diagnoses.

**New Notification for Sharon Stone - 8741** Unsaved

**Participant**

Participant Type \*  Child Only

If Child, name of parent/caregiver

Referral Focus \*  Relationship to Child

Mental Health ICD-10 \*

Substance Abuse ICD-10 \*

\* Screenshot depicts created test data



# SAMH TANF User Manual

## 10.1.4. Household

- a. 200% of Federal Poverty Level
- b. Amount Per Additional Person
- c. Total – Calculated amount based upon the number of adults and children entered.
- d. Annual Household Income – Required.
- e. Number of Adults – Required.
- f. Number of Children – Required.
- g. No household income – Checkbox. Optional. If no household income is selected, provide explanation in popup text box.
- h. Number of Child(ren) Living in/At – Required. Total must match the Number of Children field.
  - i. Home
  - ii. Shelter
  - iii. Homeless
  - iv. With Friend
  - v. With Relative
  - vi. Foster Care
  - vii. Residential
  - viii. Other If Other is selected, provide description in popup text box.

**New Notification for Sharon Stone - 8741** Unsaved

**Household**

200% of Federal Poverty Level	200% Total Additional Person Amount	Total
\$29,160	\$30,840	\$60,000

Annual Household Income *	Number of Adults *	Number of Children *
\$36,125	1	3

No household income

**Number of Child(ren) Living In/At**

Home	Shelter	Homeless	With Friend
2			

With Relative	Foster Care	Residential	Other
	1		

[Save Draft](#) [Submit](#)

\* Screenshot depicts created test data



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### 10.1.5. Assistance

- a. Reason for Assistance – Drop down. Required.
- b. Type of Assistance – Drop down. Required.
- c. Requested Service(s) – Drop down. Required.
  - i. Scroll or search by full/partial word.

The screenshot shows a web form titled "New Notification for Sharon Stone - 8741" with an "Unsaved" indicator. The form is divided into a left sidebar and a main content area. The sidebar has tabs for "Eligibility", "Address", "Participant", "Household", and "Assistance", with "Assistance" highlighted. The main content area is titled "Assistance" and contains three required fields: "Reason(s) for Assistance" with a dropdown menu showing "Child welfare", "Type of Assistance" with a dropdown menu showing "TANF SAMH Diversion Family", and "Requested Service(s)" with a dropdown menu showing "Day Treatment" and "In-Home and On-Site Svcs". At the bottom right of the form are "Save Draft" and "Submit" buttons.

\* Screenshot depicts created test data

### 10.1.6. Messages

The Messages tab will only appear after a notification has either been saved as a draft or submitted for the TANF Specialist to review.

Messages can be created by any user who has access to a notification. After the message is created, an email will be sent to the receiver(s) letting them know they have a message to view inside the TANF application. Once a message has been sent, it can't be modified. Only the DCF Administrator role can delete a message. All messages related to a specific notification will appear on the Messages tab in a descending order. When the receiver logs into the TANF application, the message will appear on their home page.



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Eligibility Address Participant Household Assistance <div style="border: 1px solid red; padding: 2px;">Messages</div>	1 to 2 of 2 items	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Subject</th> <th style="text-align: left;">Sent By</th> <th style="text-align: left;">Date Sent</th> </tr> </thead> <tbody> <tr> <td>Adjusting Additional Person Amount</td> <td>TestAdmin_TANF@myflfamilies.com</td> <td>07/04/2023 03:10 PM</td> </tr> <tr> <td>Message regarding TANF Notification 47</td> <td>TestME_TANF@myflfamilies.com</td> <td>07/04/2023 03:08 PM</td> </tr> </tbody> </table>	Subject	Sent By	Date Sent	Adjusting Additional Person Amount	TestAdmin_TANF@myflfamilies.com	07/04/2023 03:10 PM	Message regarding TANF Notification 47	TestME_TANF@myflfamilies.com	07/04/2023 03:08 PM	<input type="button" value="+ New Message"/>
Subject	Sent By	Date Sent										
Adjusting Additional Person Amount	TestAdmin_TANF@myflfamilies.com	07/04/2023 03:10 PM										
Message regarding TANF Notification 47	TestME_TANF@myflfamilies.com	07/04/2023 03:08 PM										

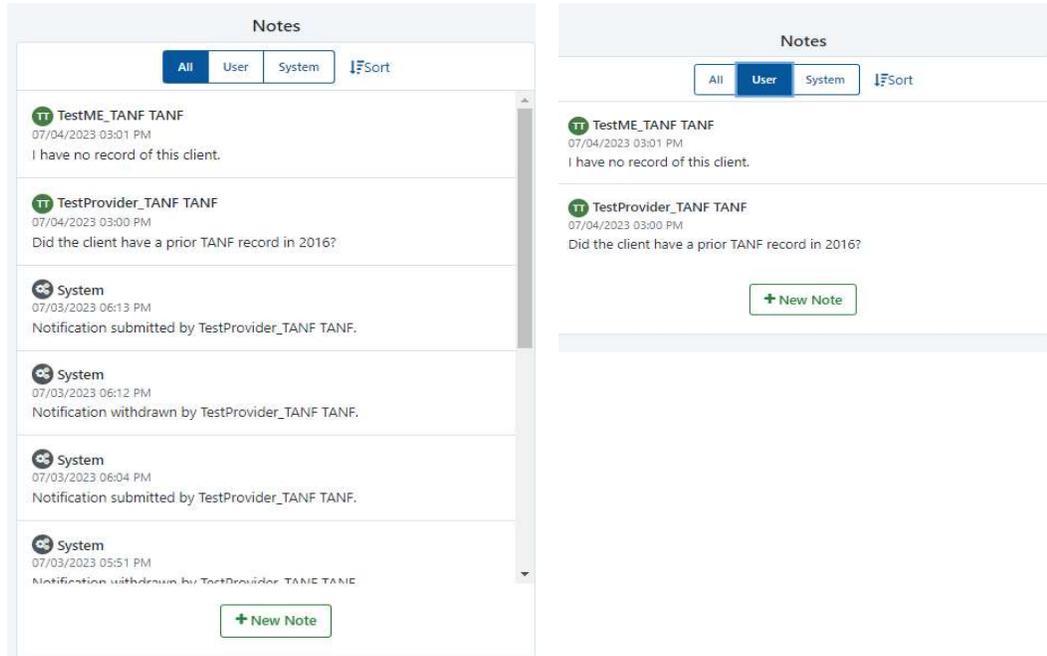
\* Screenshot depicts created test data

## 10.1.7. Notes

The notes section will only appear after a notification has either been saved as a draft or submitted for the TANF Specialist to review. Notes will contain any notes that are created by a user or actions performed by the system. A user can choose to see All, User, or System notes and can sort notes by date. All notes created by user or system will include a date/timestamp and who created the note. Once a note has been sent, it can't be modified. Only the DCF Administrator role can delete a note.



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## 10.2. Save as a Draft

A notification with all required fields completed can be saved as a draft if the Provider is not ready to submit it to the TANF Specialist. These notifications will have a status of 'Draft' and will be given a Notification ID. The Provider will have the ability to either Edit, Delete, or Submit the notification.



## 11. Submit a Notification

If the notification is submitted, the notification will be given a Notification ID and will have a status of 'Pending'. The date and the name of the person who submitted the notification will also appear on the Eligibility tab and a Notes section will appear on the right side of the notification. The notification will be available for the TANF Specialist to review.



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**Notification 32** (Sharon Stone - 8741) Pending

**Eligibility**

Address	Site	Provider	Managing Entity
Participant	Glorious Days	Miami Behavioral Health Center	Central Florida Cares Health System

Household	EZ Form Signature Date *	Service Eligibility Begin Date *	Receiving Medicaid
Assistance	06/23/2023	06/23/2023	<input type="checkbox"/>

Created on 08/03/2023, by Tamara Anderson   Submitted on 08/03/2023, by Larry Cableman

\* Screenshot depicts created test data

## 11.1. Withdraw a Notification

If a TANF Provider user determines that the TANF notification needs a correction after it has been submitted to the TANF Specialist, the TANF Provider user can withdraw the notification. Withdrawal of the notification will cause the status to change from 'Pending' to 'Draft' and the TANF Specialist will not be able to view the notification until it has been resubmitted.

**Notification 32** (Sharon Stone - 8741) Pending

**Eligibility**

Address	Site	Provider	Managing Entity
Participant	Glorious Days	Miami Behavioral Health Center	Central Florida Cares Health System

Household	EZ Form Signature Date *	Service Eligibility Begin Date *	Receiving Medicaid
Assistance	06/23/2023	06/23/2023	<input type="checkbox"/>

Created on 08/03/2023, by Tamara Anderson   Submitted on 08/03/2023, by Larry Cableman

Withdraw

\* Screenshot depicts created test data



# SAMH TANF User Manual

## 11.2.Delete a Notification

If the notification has been created in error, the TANF Provider user can delete a notification that is in a 'Draft' status. This can be done when a notification has been saved as a draft or withdrawn.

The screenshot shows a web interface for a notification titled "Notification 32 (Sharon Stone - 8741)". In the top right corner, there is a "Draft" status indicator. On the left side, there is a vertical navigation menu with options: Eligibility, Address, Participant, Household, Assistance, and Messages. The main content area is titled "Eligibility" and contains several input fields: "Site" (Glorious Days), "Provider" (Miami Behavioral Health Center), "Managing Entity" (Central Florida Cares Health System), "EZ Form Signature Date" (06/23/2023), "Service Eligibility Begin Date" (06/23/2023), and "Receiving Medicaid" (checkbox). At the bottom of the form, there are three buttons: "Delete" (highlighted with a red box), "Edit", and "Submit". Below the form, a note states "Created on 08/03/2023, by Tamara Anderson".

\* Screenshot depicts created test data

## 11.3.Reject a Notification

Once the notification has been submitted to the TANF Specialist, it will be reviewed for accuracy. If an issue is identified with the notification, the TANF Specialist can reject the notification. A reason for the rejection is required and will be displayed in the Notes section of the notification. This will send the notification back to the Provider. The notification status will change from 'Pending' to 'Rejected'. The date and who rejected the notification will appear on the Eligibility tab of the notification.



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## 11.3.1. Rejected Notification - Provider View

If there is an issue with a notification and it is rejected by the TANF Specialist, the Provider will be able to edit the notification, correct the issue and then resubmit the notification to the TANF Specialist.

Notification 32 (Sharon Stone - 8741) Rejected

**Eligibility**

Address: Site: Glorious Days, Provider: Miami Behavioral Health Center, Managing Entity: Central Florida Cares Health System

Participant: Glorious Days

Household: EZ Form Signature Date \*: 06/23/2023, Service Eligibility Begin Date \*: 06/23/2023, Receiving Medicaid:

Assistance: 06/23/2023

Messages: Created on 08/03/2023, by Tamara Anderson Submitted on 08/03/2023, by Larry Cableman Rejected on 08/04/2023, by Jerry-Lynn

[Edit](#)

\* Screenshot depicts created test data

## 11.3.2. Rejected Notification - TANF Specialist View

If there is no issue for the Provider to correct, the TANF Specialist can undo the rejection of the notification and continue the review.

Notification 32 (Sharon Stone - 8741) Rejected

**Eligibility**

Address: Site: Glorious Days, Provider: Miami Behavioral Health Center, Managing Entity: Central Florida Cares Health System

Participant: Glorious Days

Household: EZ Form Signature Date \*: 06/23/2023, Service Eligibility Begin Date \*: 06/23/2023, Receiving Medicaid:

Assistance: 06/23/2023

Messages: Created on 08/03/2023, by Tamara Anderson Submitted on 08/03/2023, by Larry Cableman Rejected on 08/04/2023, by Jerry-Lynn

[Undo Rejection](#)

\* Screenshot depicts created test data



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## 11.4. Approve a Notification

Once the notification has been reviewed for accuracy and if no issues are identified, the TANF Specialist will approve the notification. The notification status will change to Approved and the notification ID will include the circuit number. The date and who approved the notification will be listed on the Eligibility tab.

### 11.4.1. Approved Notification - Provider View

Notification C18-32 (Sharon Stone - 8741) Approved

**Eligibility**

Address: Site: Glorious Days; Provider: Miami Behavioral Health Center; Managing Entity: Central Florida Cares Health System

Participant: Glorious Days

Household: EZ Form Signature Date: 06/23/2023; Service Eligibility Begin Date: 06/23/2023; Receiving Medicaid:

Assistance: 06/23/2023

Messages: Created on 08/03/2023, by Tamara Anderson; Submitted on 08/03/2023, by Larry Cableman; Approved on 08/03/2023, by Jerry-Lynn

Discharge

\* Screenshot depicts created test data

### 11.4.2. Approved Notification - TANF Specialist View

If it is found that the notification was approved in error, the TANF Specialist can undo the approval. This will take the notification from 'Approved' to 'Pending' status. The approval notification ID will change back to the notification ID, and the date and who approved the notification will be removed.

Notification C18-32 (Sharon Stone - 8741) Approved

**Eligibility**

Address: Site: Glorious Days; Provider: Miami Behavioral Health Center; Managing Entity: Central Florida Cares Health System

Participant: Glorious Days

Household: EZ Form Signature Date: 06/23/2023; Service Eligibility Begin Date: 06/23/2023; Receiving Medicaid:

Assistance: 06/23/2023

Messages: Created on 08/03/2023, by Tamara Anderson; Submitted on 08/03/2023, by Larry Cableman; Approved on 08/03/2023, by Jerry-Lynn

Undo Approval

\* Screenshot depicts created test data

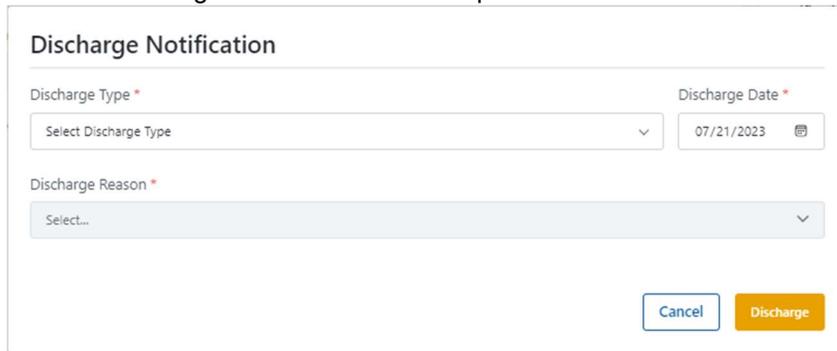
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### 12. Discharge a Notification

The Provider can only discharge a notification that is in an 'Approved' status. When the Discharge button is selected, a Discharge Notification popup message will appear. The provider will select a single Discharge Type, which will filter the Discharge Reason. Multiple discharge reasons for the Discharge Type can be selected. The Discharge Date defaults to the current date. If the discharge happened on a prior date, the Provider will be able to edit the date to reflect the correct date of discharge. Once the discharge has been completed, the notification status will change from 'Approved' to 'Discharged' and a Discharge tab will appear between the Assistance and Messages tabs. The Discharge tab will contain the data that was entered on the popup.

- Discharge Type – Drop down. Required.
- Discharge Reason – Drop down. Required.
- Discharge Date – Editable. Required



The screenshot shows a 'Discharge Notification' popup form. It contains three main input fields: 'Discharge Type \*' with a dropdown menu showing 'Select Discharge Type', 'Discharge Date \*' with a date field showing '07/21/2023' and a calendar icon, and 'Discharge Reason \*' with a dropdown menu showing 'Select...'. At the bottom right, there are two buttons: 'Cancel' and 'Discharge'.

If the Provider discharged the participant in error, the Provider could Reopen the notification. This will change the status back to 'Approved' and remove the Discharge tab from between the Assistance and Messages Tab.

### 13. Re-Certification

The re-certification of active clients happens annually from July 1 to July 31. During this time frame, the Recertify button will be visible for all notifications that are in an 'Approved' status. Note: The DCF Admin can extend the recertification past July 31<sup>st</sup> as needed.



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Notification C4-22 (Bobby Boop - 3221) Approved

**Eligibility**

Address: Site: Working Wonders, Provider: 1st Step Behavioral Health Provider, Managing Entity: Lutheran Services Florida

Participant: Working Wonders

Household: EZ Form Signature Date \*: 06/02/2023, Service Eligibility Begin Date \*: 06/02/2023, Receiving Medicaid:

Assistance: 06/02/2023

Messages: Created on 07/21/2023, by John Public | Submitted on 07/21/2023, by John Public | Approved on 07/21/2023, by Johnny Lutheran

Discharge Recertify

\* Screenshot depicts created test data

### 13.1.1. Recertification New Notification

When the Provider selects a notification to recertify, the system will automatically discharge the current notification and create a duplicate of the notification that will be in a 'Draft' status and will include a Recertification indicator.

Notification 33 (Barry Boop - 3211) Recertification Draft

**Eligibility**

Address: Site: Working Wonders, Provider: 1st Step Behavioral Health Provider, Managing Entity: Lutheran Services Florida

Participant: Working Wonders

Household: EZ Form Signature Date \*: mm/dd/yyyy, Service Eligibility Begin Date \*: 07/01/2023, Receiving Medicaid:

Assistance: mm/dd/yyyy

Messages: Created on 08/04/2023, by John Public

Delete Edit Submit

\* Screenshot depicts created test data

All the data from the original notification will remain except for the following:

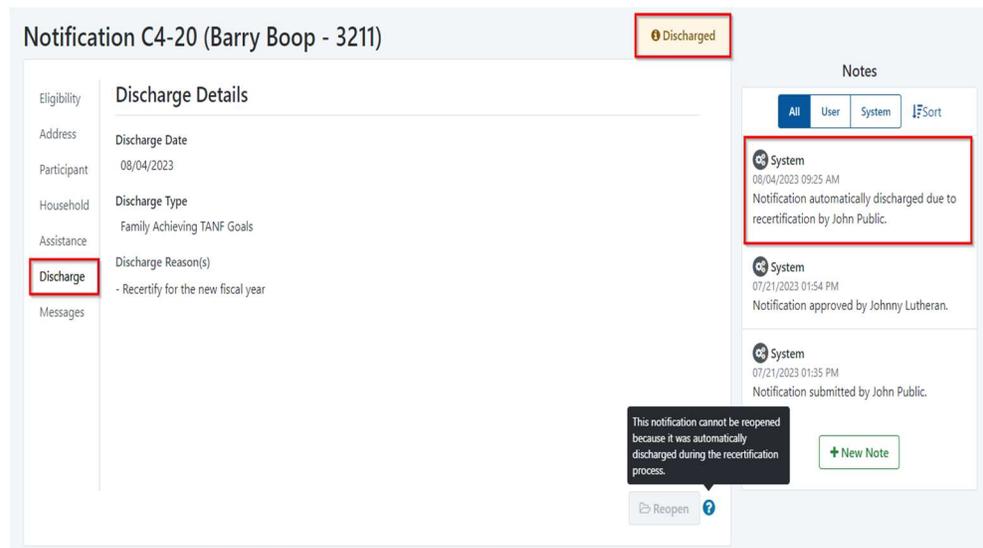
- Eligibility:
  - EZ Form Signature Date will be blank.

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- Service Eligibility Begin Date will be auto populated with the first day of the recertification period.
- Messages:
  - All messages for the original notification will remain with that notification.
- Status
  - The status will be set to Draft to allow the Provider to make updates as necessary.
  - The Provider will then submit the Recertification Notification to the TANF Specialist for approval.

### 13.1.2. Recertification Discharged Notification

When the provider selects the Recertify button, the system will automatically discharge the notification with the Discharge Type: Family Achieving TANF Goals and Discharge Reason: Recertify for the new fiscal year. The status will change from 'Approved' to 'Discharged'. The system will create a new notification with a status of 'Recertification'. A discharged notification that is part of the recertification process cannot be reopened because it was automatically discharged.



The screenshot displays a notification record for Barry Boop (3211) with a status of 'Discharged'. The 'Discharge Details' section includes the following information:

Field	Value
Discharge Date	08/04/2023
Discharge Type	Family Achieving TANF Goals
Discharge Reason(s)	- Recertify for the new fiscal year

The 'Notes' section contains three entries:

- System (08/04/2023 09:25 AM): Notification automatically discharged due to recertification by John Public.
- System (07/21/2023 01:54 PM): Notification approved by Johnny Lutheran.
- System (07/21/2023 01:35 PM): Notification submitted by John Public.

A tooltip message states: "This notification cannot be reopened because it was automatically discharged during the recertification process." A 'Reopen' button is visible at the bottom of the notification record.

\* Screenshot depicts created test data

## 14. Notifications

All users can view notifications, based upon their role, by selecting the Notifications link at the top of the home page. Notifications can be filtered by All, Draft, Pending, Approved, Rejected and Discharged. Most of the columns in each filter are sortable. Users have the ability to produce a spreadsheet of any of the filters by selecting the Export button.



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Notification Id	Notification Date	Client Name	Client SSN	Client Id	Client DOB	Circuit	Site	Provider	Managing Entity	Status
13	07/12/2023	Sanford, George	2285		09/14/1999	2	Sunny Vibes	Aresenio Memorial Community Provider	Central Florida Behavioral Health Network, Inc.	Pending
12	07/12/2023	Sanford, George	2285		09/14/1999	2	Sunny Vibes	Aresenio Memorial Community Provider	Central Florida Behavioral Health Network, Inc.	Discharged
11	07/12/2023	Tubbs, Ricardo	2345		07/17/1978	3	Glorious Days	Miami Behavioral Health Center	Central Florida Cares Health System	Rejected
10	07/12/2023	Garcia, Hector	1285		06/28/1999	2	Compassionate Care	Aresenio Memorial Community Provider	Central Florida Behavioral Health Network, Inc.	Approved
9	07/12/2023	Smith-Johnson, Mary	1245		08/13/2004	2	SAMH Test Site #234	SAMH Test Provider	Lutheran Services Florida	Pending

\* Screenshot depicts created test data

## 14.1. Notification Advanced Filters

All users can do an advanced search for notifications using the Advanced Filters that can be expanded directly below the Notifications status filter. Based upon a user's role, they can search for notifications by:

- From Date
- To Date
- Notification Id / Confirmation Number
- Client Id
- Client First Name
- Client Last Name
- Client Date of Birth
- Client SSN
- Site
- Provider
- Managing Entity
- Circuit

The screenshot shows the 'Advanced Filters' section of the Notifications page. It includes the following fields:

- From Date:** 07/01/2023
- To Date:** 08/04/2023
- Notification Id / Confirmation Number:** (Empty)
- Client Id:** (Empty)
- Client First Name:** (Empty)
- Client Last Name:** (Empty)
- Client Date of Birth:** mm/dd/yyyy
- Client SSN:** (Empty)
- Site:** Select a site (Dropdown)
- Provider:** Select a provider (Dropdown)
- Managing Entity:** Select a managing entity (Dropdown)
- Circuit:** Select a circuit (Dropdown)

Buttons for 'Reset' and 'Search' are located at the bottom right of the filter section.

\* Screenshot depicts created test data



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## 14.2. Notification Filter – All

The All filter is the default filter for all users when the Notification link is selected. The user’s role will determine which notifications are displayed. The following columns are displayed in the Notification List.

- Notification Id
- Notification Date
- Client Name
- Client SSN
- Client Id
- Client DOB
- Circuit
- Site
- Provider
- Managing Entity
- Status
- Eligibility Date
- Discharge Date
- Discharge Type

Notifications											Export Results
All	Draft	Pending	Approved	Rejected	Discharged	Search by Client Name/SSN, ME/Provider FEIN, or Confirmation Number					
Advanced Filters											
Notification Id	Notification Date	Client Name	Client SSN	Client Id	Client DOB	Circuit	Site	Provider	Managing Entity	Status	
23	07/21/2023	Woodpecker, Wooly	1010	WW-001	10/10/1990	4	Working Wonders	1st Step Behavioral Health Provider	Lutheran Services Florida	Rejected	
26	07/21/2023	Duck, Danny	1155	DD-002	05/05/1995	4	Working Wonders	1st Step Behavioral Health Provider	Lutheran Services Florida	Draft	
27	07/25/2023	Jacobs, Carly	1234		01/01/2007	4	SAMH Test Site #234	SAMH Test Provider	Lutheran Services Florida	Approved	
28	07/26/2023	Public, Jane	1234		01/01/2001	4	Working Wonders	1st Step Behavioral Health Provider	Lutheran Services Florida	Discharged	
9	07/12/2023	Smith-Johnson, Mary	1245		08/13/2004	4	SAMH Test Site #234	SAMH Test Provider	Lutheran Services Florida	Pending	
14	07/12/2023	Dallas, JoAnne	1255		05/19/1998	18	Glorious Days	Miami Behavioral Health Center	Central Florida Cares Health System	Draft	

\* Screenshot depicts created test data

## 14.3. Notification Filter – Draft

The Draft filter will display all notifications that have been completed but have not been submitted to the TANF Specialist for approval. The user’s role will determine which notifications are displayed.



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Notifications Export Results

All **Draft** Pending Approved Rejected Discharged

Search by Client Name/SSN, ME/Provider FEIN, or Confirmation Number

Advanced Filters

Notification Id	Notification Date	Client Name	Client SSN	Client Id	Client DOB	Circuit	Site	Provider	Managing Entity	Status
37	08/04/2023	Stone, Sharon	8741		03/31/1999	18	Glorious Days	Miami Behavioral Health Center	Central Florida Cares Health System	Draft
36	08/04/2023	Boop, Betsy	3112	BB-001	01/01/1991	4	Working Wonders	1st Step Behavioral Health Provider	Lutheran Services Florida	Draft
33	08/04/2023	Boop, Barry	3211	BB-2	11/11/1991	4	Working Wonders	1st Step Behavioral Health Provider	Lutheran Services Florida	Draft
31	08/03/2023	Hillman, Jerry	5555	14212	08/14/1988	4	SAMH Test Site #234	SAMH Test Provider	Lutheran Services Florida	Draft
26	07/21/2023	Duck, Danny	1155	DD-002	05/05/1995	4	Working Wonders	1st Step Behavioral Health Provider	Lutheran Services Florida	Draft
14	07/12/2023	Dallas, JoAnne	1255		05/19/1998	18	Glorious Days	Miami Behavioral Health Center	Central Florida Cares Health System	Draft
4	07/11/2023	Conseco, Hector	8888		10/05/1999	18	Thumbs Up Recovery	Gentle Hands - Testing	Central Florida Cares Health System	Draft
3	07/11/2023	Jetson, Kimberly	7895	95-G	02/28/2001	18	Thumbs Up Recovery	Gentle Hands - Testing	Central Florida Cares Health System	Draft

1 to 8 of 8 items

\* Screenshot depicts created test data

## 14.4. Notification Filter – Pending

The Pending filter will display all notifications that have been completed and submitted to the TANF Specialist for approval. The user's role will determine which notifications are displayed.

Notifications Export Results

All Draft **Pending** Approved Rejected Discharged

Search by Client Name/SSN, ME/Provider FEIN, or Confirmation Number

Advanced Filters

Notification Id	Notification Date	Client Name	Client SSN	Client Id	Client DOB	Circuit	Site	Provider	Managing Entity	Status
16	07/18/2023	McIntire, Fancy	5454		04/22/2007	4	SAMH Test Site #234	SAMH Test Provider	Lutheran Services Florida	Pending
15	07/18/2023	Duck, Dashing	5335		05/25/1995	4	Working Wonders	1st Step Behavioral Health Provider	Lutheran Services Florida	Pending
13	07/12/2023	Sanford, George	2285		09/14/1999	10	Compassionate Care	Aresenio Memorial Community Provider	Central Florida Behavioral Health Network, Inc.	Pending
10	07/12/2023	Garcia, Hector	1285		06/28/1999	10	Compassionate Care	Aresenio Memorial Community Provider	Central Florida Behavioral Health Network, Inc.	Pending
9	07/12/2023	Smith-Johnson, Mary	1245		08/13/2004	4	SAMH Test Site #234	SAMH Test Provider	Lutheran Services Florida	Pending
5	07/11/2023	Jerry, Ben	2347		04/18/1988	18	Thumbs Up Recovery	Gentle Hands - Testing	Central Florida Cares Health System	Pending

1 to 6 of 6 items

\* Screenshot depicts created test data

## 14.5. Notification Filter – Approval

The Approval filter will display all notifications that have been approved by the TANF Specialist. The user's role will determine which notifications will be displayed. The Approved Notification list displays the Confirmation Number. The user's role will determine the which notifications will be displayed.



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Notifications Export Results

All Draft Pending **Approved** Rejected Discharged

Search by Client Name/SSN, ME/Provider FEIN, or Confirmation Number

Advanced Filters

Notification Id	Notification Date	Client Name	Client SSN	Client Id	Client DOB	Circuit	Site	Provider	Managing Entity	Status	Confirmation Number
27	07/25/2023	Jacobs, Carly	1234		01/01/2007	4	SAMH Test Site #234	SAMH Test Provider	Lutheran Services Florida	Approved	C4-27
22	07/21/2023	Boop, Bobby	3221	BB-003	02/02/2012	4	Working Wonders	1st Step Behavioral Health Provider	Lutheran Services Florida	Approved	C4-22
7	07/11/2023	La Croix, Horace	4887		06/28/1962	18	Glorious Days	Miami Behavioral Health Center	Central Florida Cares Health System	Approved	C3-7
6	07/11/2023	Fletcher, Jenna	1988		04/20/2001	18	Thumbs Up Recovery	Gentle Hands - Testing	Central Florida Cares Health System	Approved	C2-6

1 to 4 of 4 items

\* Screenshot depicts created test data

## 14.6. Notification Filter – Rejected

The Rejected filter will display all notifications that have been rejected by the TANF Specialist and returned to the Provider for corrections. The user’s role will determine which notifications are displayed.

Notifications Export Results

All Draft Pending Approved **Rejected** Discharged

Search by Client Name/SSN, ME/Provider FEIN, or Confirmation Number

Advanced Filters

Notification Id	Notification Date	Client Name	Client SSN	Client Id	Client DOB	Circuit	Site	Provider	Managing Entity	Status
24	07/21/2023	Woodpecker, Wally	3223	WW-002	03/03/2013	4	Working Wonders	1st Step Behavioral Health Provider	Lutheran Services Florida	Rejected
23	07/21/2023	Woodpecker, Wooly	1010	WW-001	10/10/1990	4	Working Wonders	1st Step Behavioral Health Provider	Lutheran Services Florida	Rejected
11	07/12/2023	Tubbs, Ricardo	2345		07/17/1978	18	Glorious Days	Miami Behavioral Health Center	Central Florida Cares Health System	Rejected

1 to 3 of 3 items

\* Screenshot depicts created test data

## 14.7. Notification Filter – Discharged

- The Discharged filter will display all notifications that have been discharged by the Provider. The Discharged Notification List includes two additional fields:
  - Discharge Type
  - Discharge Reason



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Notifications													Export Results
All	Draft	Pending	Approved	Rejected	Discharged	Search by Client Name/SSN, ME/Provider FEIN, or Confirmation Number							
Advanced Filters													
Notification Id	Notification Date	Client Name	Client SSN	Client Id	Client DOB	Circuit	Site	Provider	Managing Entity	Status	Discharge Type	Discharge Reason(s)	
35	08/04/2023	Boop, Betsy	3112	BB-001	01/01/1991	4	Working Wonders	1st Step Behavioral Health Provider	Lutheran Services Florida	Discharged	Family Achieving TANF Goals	Multiple	
34	08/04/2023	Boop, Betsy	3112	BB-001	01/01/1991	4	Working Wonders	1st Step Behavioral Health Provider	Lutheran Services Florida	Discharged	Family Achieving TANF Goals	Multiple	
32	08/03/2023	Stone, Sharon	8741		03/31/1999	18	Glorious Days	Miami Behavioral Health Center	Central Florida Cares Health System	Discharged	Family Achieving TANF Goals	Multiple	
28	07/26/2023	Public, Jane	1234		01/01/2001	4	Working Wonders	1st Step Behavioral Health Provider	Lutheran Services Florida	Discharged	Meets Immediate Discharge Criteria	Multiple	
25	07/21/2023	Duck, Dapper	4114	DD-001	04/04/1994	4	Working Wonders	1st Step Behavioral Health Provider	Lutheran Services Florida	Discharged	Meets Immediate Discharge Criteria	Multiple	
21	07/21/2023	Boop, Betsy	3112	BB-001	01/01/1991	4	Working Wonders	1st Step Behavioral Health Provider	Lutheran Services Florida	Discharged	Family Achieving TANF Goals	Multiple	

\* Screenshot depicts created test data

## 14.8. TANF Participant Log Report

All users can create a TANF Participant Log by selecting the Reports link at the top of the home page. The user's role will determine which Provider(s) will be listed in the Provider drop down. The user will complete the following fields to generate the TANF Participant Log Report.

- Fiscal Year (FY) – Drop Down. Default to current FY
- Month – Drop Down
- Provider – Drop Down

TANF Home Clients Notifications **Reports** Contacts

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### TANF Participant Log Report

Fiscal Year: FY-2024 [x] v

Month: Aug 2023 [x] v

Provider: SAMH Test Provider [x] v

**Generate**

The user will select the Generate button and a PDF report will be created for the user to download.

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### 14.8.1. DCF SAMH TANF Participant Log Report

A Provider can attest that the participants listed on the log meet the TANF Income eligibility requirements for the month generated according to the 200% of Federal Poverty level guidelines provided and that all of the information is correct. The Provider should generate and print the monthly log, and print their name, date, and sign the log before submitting it to their Managing Entity TANF Specialist.

Based on the report selections, the TANF Participant Log will be broken down by Program. If the Referral Focus on the Notification for a participant indicated Co-Occurring, the client will show under each Program. The following information is displayed in the TANF Participant Log.

- Provider Name
- Provider Address
- Circuit
- Program (Based on services offered at Provider Site)
  - AMH – Adult Mental Health
  - ASA – Adult Substance Abuse
  - CMH – Child Mental Health
  - CSA – Child Substance Abuse
- FY – Fiscal Year
- Month for which the report was generated
- Client
- SSN
- Notification/Approval Number
- Status
  - 1 =TCA
  - 2 =TDF
  - 3 =Successful (Discharge) D/C
  - 4 =Administrative (Discharge) D/C
  - 5 =No longer eligible
  - 6 =Unsuccessful (Discharge) D/C
- Date
  - Eligibility Begin Date for Statuses 1 and 2
  - Date the Notification was Discharged for Statuses 3 – 6



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A sample TANF Participant Log that was generated using created test data is shown below.

**Provider: SAMH Test Provider**  
 Address: 1534 Kings Way , Jacksonville 32201  
 Circuit: 4 FY-2024  
 Program: CMH August

Client	SSN	Notification	Status	Date
Jacobs, Carly	555551234	C4-27	2	07/04/2023

**Participant Status Definitions**

- 1 =TCA
- 2 =TDF
- 3 =Successful D/C
- 4 =Administrative D/C
- 5 =No longer eligible
- 6 =Unsuccessful D/C

---

\* I am attesting by my signature that the TDF participants on this Log still meet the TANF Income eligibility requirements for this month according to the 200% of Federal Poverty level guidelines provided.

Provider Name (Print)

Date

Provider Signature

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\* Screenshot depicts created test data

## 15. Managing Entity Contact List

All users can view a list of the TANF Specialists by selecting the Contacts link at the top of the home page.



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TANF Home Clients Notifications Reports **Contacts**

Welcome, TestProvider\_TANF TANF

My Messages

Subject :	Related Notification :	Date Sent :	Sent By :	Status :
Message regarding TANF Notification 70	70	08/18/2023 02:11 PM	TestME_TANF@myffamilies.com	Read
Message regarding TANF Notification C18-1196	1196	08/22/2023 12:11 PM	TestME_TANF@myffamilies.com	Read
Message regarding TANF Notification C18-76	76	08/21/2023 02:25 PM	TestME_TANF@myffamilies.com	Read

1 to 3 of 3 items

\* Screenshot depicts created test data

The active TANF Specialists are listed as Managing Entity Contacts.

TANF Home Clients Notifications Reports **Contacts**

Managing Entity Contacts

Managing Entity	Contact Name	Contact Email	Contact Phone
Big Bend Community Based Care	Johnny Lutheran Jr.	✉ Johnny.Lutheran@example.com	407-407-4007
Big Bend Community Based Care	Multiple ME	✉ MultipleME@example.com	8508508550
Broward Behavioral Health Coalition	Ibelice Rivera	✉ irivera@ctbhn.org	813-690-6270
Broward Behavioral Health Coalition	Multiple ME	✉ MultipleME@example.com	8508508550
Broward Behavioral Health Coalition	Pauline Abshire	✉ Pauline.Abshire@example.com	(181) 695-9934
Central FL Behavioral Health Network	Albert Muller	✉ Albert46@example.com	(184) 442-2615
Central Florida Cares Health System	Joan VonRueden	✉ Joan_VonRueden@example.com	(754) 683-0498
Central Florida Cares Health System	Multiple ME	✉ MultipleME@example.com	8508508550

\* Screenshot depicts created test data

The following columns are displayed in the Managing Entity Contacts list.

- Managing Entity
- Contact Name
- Contact Email
- Contact Phone Number