



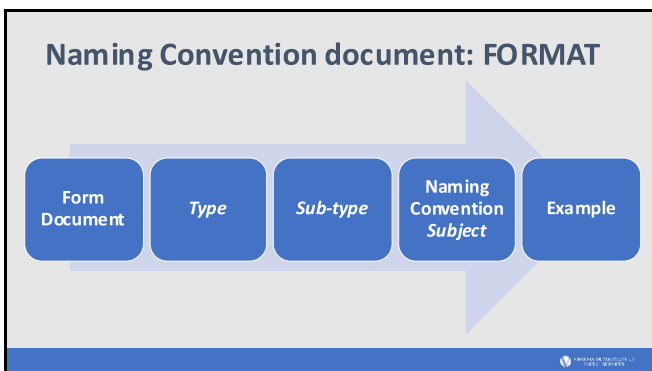
Naming Convention document

The Naming Convention document and other items needed for the Quarterly QA review are located on the title IV-E FUSION page.

<https://FUSION.dss.virginia.gov/dfs/Home/Title-IV-E-Foster-Care/Quarterly-QA-Reviews>


| Type | Sub-Type | Naming Convention - Subject | Example |
|---|-----------------------|---|---|
| <i>Case with sibling groups, the subject is specific to the child</i> | | | |
| Participant Case law | | | |
| IV-E | Permanent Termination | Birth Certificate - (name of youth) | Birth Certificate - John |
| IV-E | Permanent Termination | Social Security Card or Application - (name of youth) | Social Security Card - John |
| Permanency Case law | | | |
| IV-E | Permanent Termination | DCSS-1010 - (name of parent) | DCSS-1010 - William Smith |
| IV-E | Court Order YES | Court Order Type - (Date signed by Judge) - (name of youth) | Emergency Removal Order - 04/11/20 - John |
| Placement Provider Case | | | |
| IV-E | Placement | Checklist for Initial Approval for (Placement Home Provider Name) | Checklist for Initial Approval for Mary Smith |

Last update: July 2025

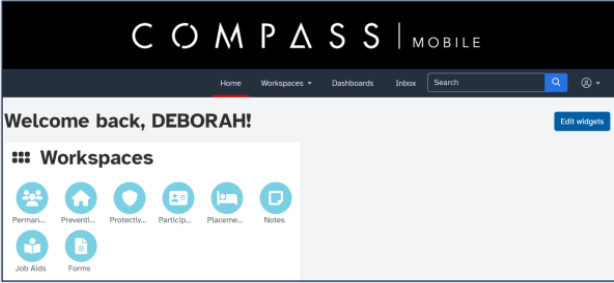


COMPASS | Mobile Portal

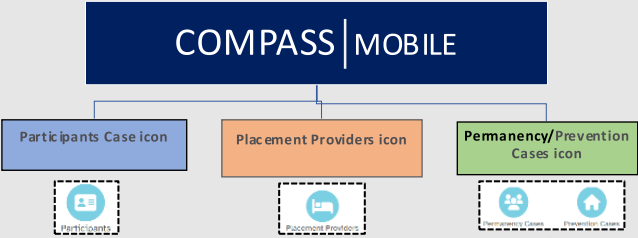
- Use [Google Chrome](#) to log in [COMPASS | Mobile Portal](#)
- The link to log in to the Portal may be found on FUSION
- To access COMPASS| Portal, you must be connected to the State Network or a VPN (Prisma Global Protect or Cisco Anyconnect)
- Log in to COMPASS| Portal using your LDAP and password.

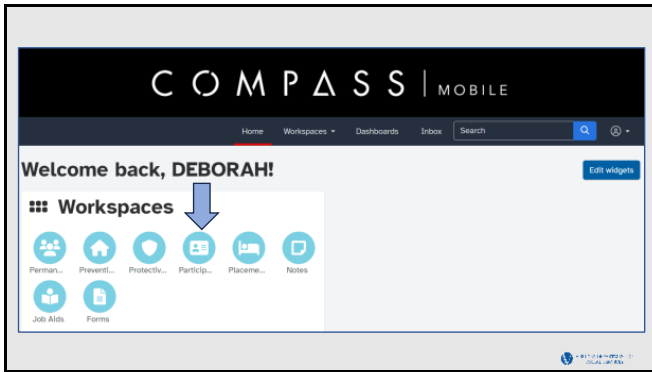


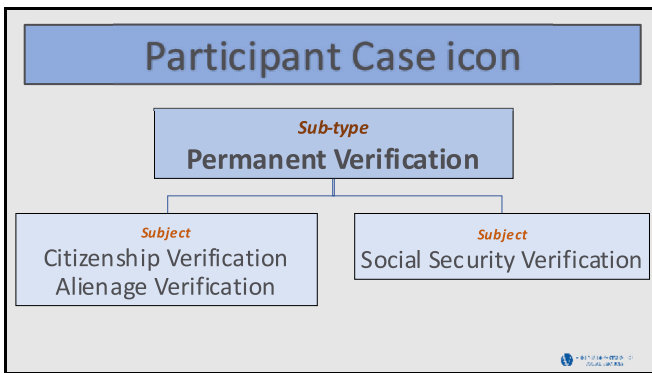
From the portal home screen, select the appropriate icon

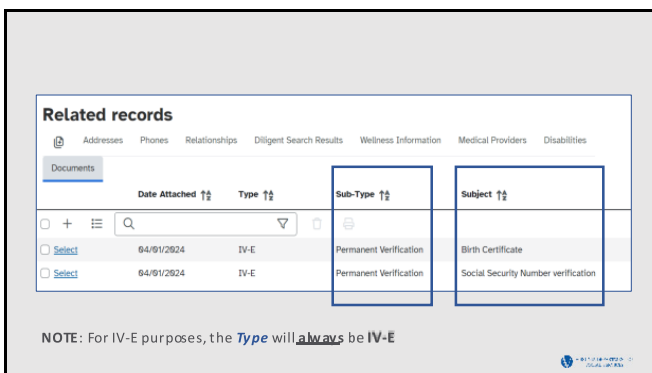


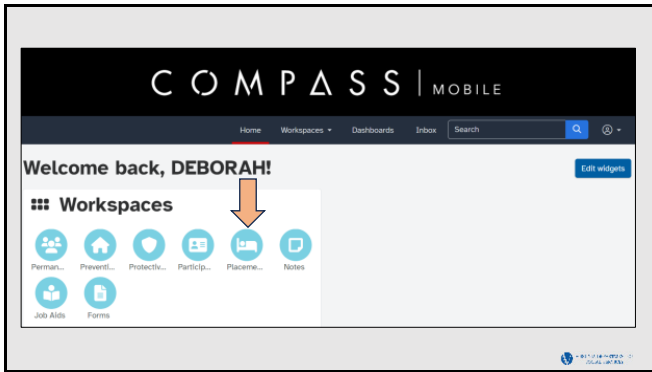
For title IV-E reviews we primarily use 3 icons

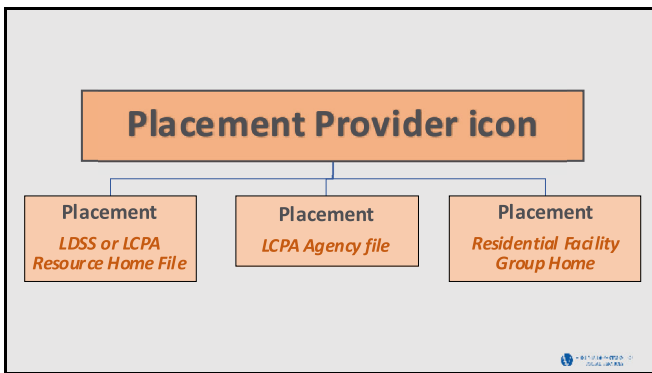


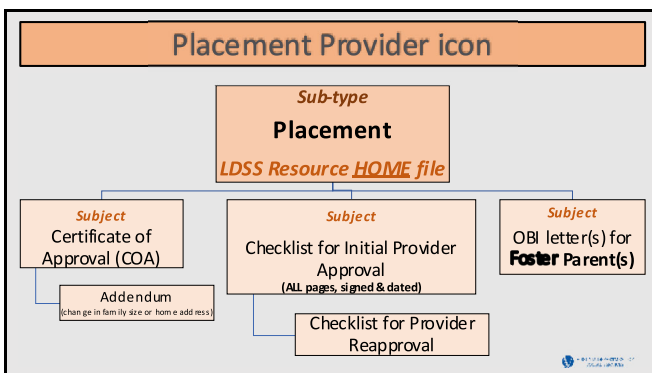












Related records

Placements

Household Members

Documents

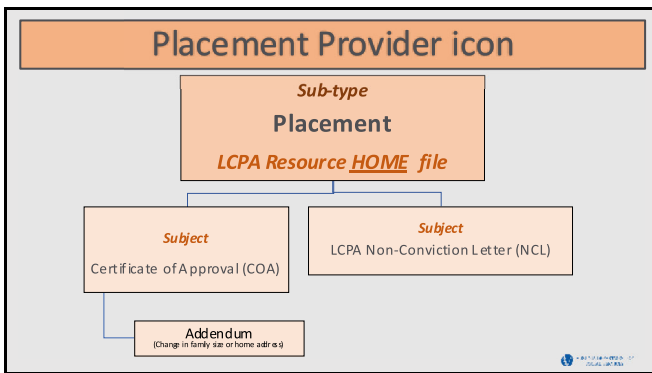
Approval Details

| | Date Attached | Type | Sub-Type | Subject |
|------------------------|---------------|------|-----------|--|
| Select | 9/18/2024 | IV-E | Placement | Certificate of Approval 12/18/23 - 12/18/24 |
| Select | 9/18/2024 | IV-E | Placement | Certificate of Approval 12/18/23 - 12/18/24 and Addendum |
| Select | 9/18/2024 | IV-E | Placement | Checklist for Re-Approval |
| Select | 9/18/2024 | IV-E | Placement | Checklist for 2024 Provider Approval |

❖ Safety Checks must be within **120** days prior to the provider's initial approval.

❖ Addendum needed when there is a change in the home (address, number of children, etc.) and/or a change in household members.

❖ NOTE: The COA and checklists are not child specific; therefore, do not upload duplicate copies of documents already in the file.



Related records

Placements

Household Members

Documents

| | Date Attached | Type | Sub-Type | Subject |
|------------------------|---------------|------|-----------|--|
| Select | 9/1/23/2024 | IV-E | Placement | Certificate of Approval- 9/4/23-9/4/26 |
| Select | 9/4/9/2024 | IV-E | Placement | LCPA Non-Conviction Letter |

❖ Safety Checks must be within **90** days prior to the provider's initial approval.

❖ NOTE: The COA and NCL are not child specific; therefore, do not upload duplicate copies of documents already in the file.

Related records

Placements

Household Members

Documents

Approval Details

Date Attached

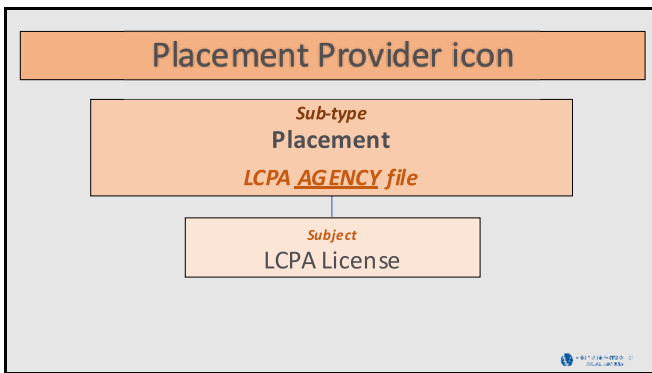
Type

Sub Type, Media Type

Subject

| | | | | |
|---------------------------------|-------------|------|-----------|--|
| <input type="checkbox"/> Select | 6/8/26/2624 | IV-E | Placement | Non-Conviction Letter |
| <input type="checkbox"/> Select | 16/9/2/2623 | IV-E | Placement | Document entry not uploaded in accordance with Naming Convention |
| <input type="checkbox"/> Select | 16/9/2/2623 | IV-E | Placement | LICENSE 4-9-16-4-9-25 |
| <input type="checkbox"/> Select | 6/5/2/2625 | IV-E | Placement | LCPA Non-Conviction Letter |
| <input type="checkbox"/> Select | 16/9/2/2623 | IV-E | Placement | LCPA Agency license incorrectly uploaded to be so once home file |

NOTE: The LCPA license should be saved under the specific placement provider in COMPASS, not under the LCPA Resource Home.



Related records

Placements

Documents

Date Attached

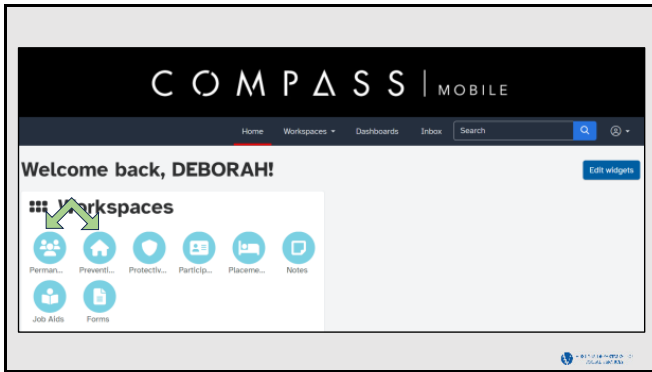
Type

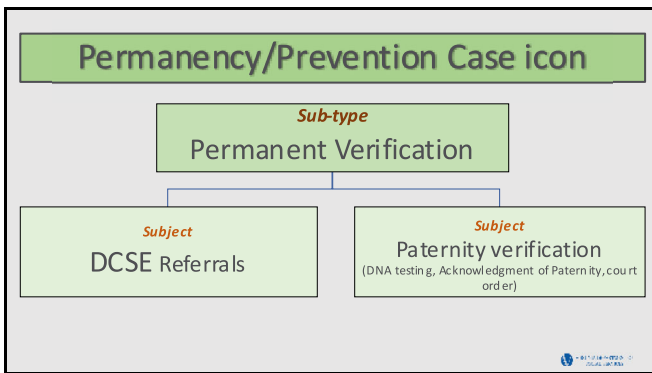
Sub-Type

Subject

| | | | | |
|---------------------------------|--------------|------|-----------|---|
| <input type="checkbox"/> Select | 6/5/12/2621 | IV-E | Placement | LCPA License Intercept Youth Services Martinsville 6-21-2621 6-26-2623 |
| <input type="checkbox"/> Select | 6/6/25/2621 | IV-E | Placement | LCPA License Intercept Youth Services Martinsville 6-21-2621 6-26-2623 |
| <input type="checkbox"/> Select | 6/5/6/4/2623 | IV-E | Placement | LCPA License Intercept (Martinsville) - 6/25/2623 - 6/29/2623 |
| <input type="checkbox"/> Select | 6/3/15/2624 | IV-E | Placement | LCPA Intercept Youth Services Martinsville 6/21/23-6/26/25 Duplicate entry -- delete |

NOTE: Please, do not upload duplicate copies of documents already in the file.



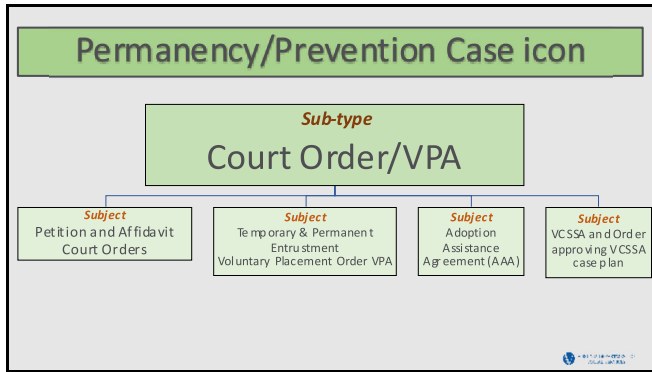


Related records

Case Participants Collaterals Contacts Documents Reminders Case Plans

| | Date Attached ↑↓ | Type ↑↓ | Sub-Type ↑↓ | Subject ↑↓ |
|---|------------------|---------|------------------------|--|
| <input type="checkbox"/> Select | 01/23/2024 | IV-E | Permanent Verification | DCSE- [REDACTED] |
| <input type="checkbox"/> Select | 01/23/2024 | IV-E | Permanent Verification | DCSE- [REDACTED] |
| <input type="checkbox"/> Select | 03/15/2024 | IV-E | Permanent Verification | Paternity Verification-DNA- [REDACTED] |

DCSE referrals: May be one upload that includes all parents
DCSE/501s – (name of parent or parents)

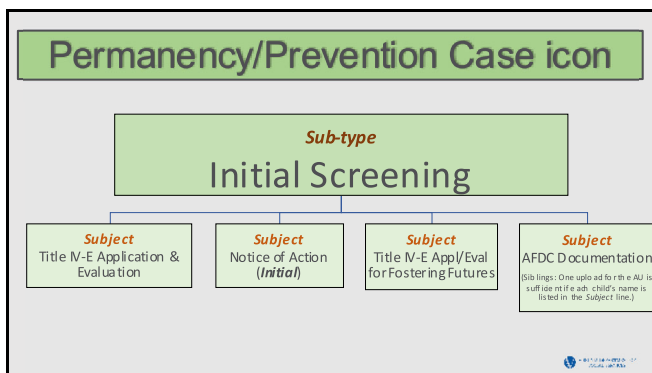


Related records

Case Participants Collaterals Contacts Documents Reminders Case Plans

| | Date Attached ↑↓ | Type ↑↓ | Sub-Type ↑↓ | Subject ↑↓ |
|---|------------------|---------|-----------------|--|
| <input type="checkbox"/> Select | 9/1/23/2024 | IV-E | Court Order/VPA | Adjudicatory Order- 1/5/2024 [REDACTED] |
| <input type="checkbox"/> Select | 9/1/23/2024 | IV-E | Court Order/VPA | Emergency Removal Order- 12/29/2023 [REDACTED] |
| <input type="checkbox"/> Select | 9/3/13/2024 | IV-E | Court Order/VPA | Dispositional Order- 2/6/2/24 [REDACTED] |
| <input type="checkbox"/> Select | 9/4/6/9/2024 | IV-E | Court Order/VPA | Order for Custody/Visitation/Parenting Time- 10/19/2020 [REDACTED] |
| <input type="checkbox"/> Select | 9/4/6/9/2024 | IV-E | Court Order/VPA | Removal Petition- 12/29/2023 [REDACTED] |
| <input type="checkbox"/> Select | 9/4/16/2024 | IV-E | Court Order/VPA | Preliminary Removal Order (12.22.24) [REDACTED] |

- ❖ The initial order must have Contrary to the Welfare (CTW).
- ❖ Reasonable efforts (RE) must be obtained **with in 60 days**.
- ❖ **All** court orders are required to be uploaded as they are needed to track Annual Judicial Reviews (AJR).

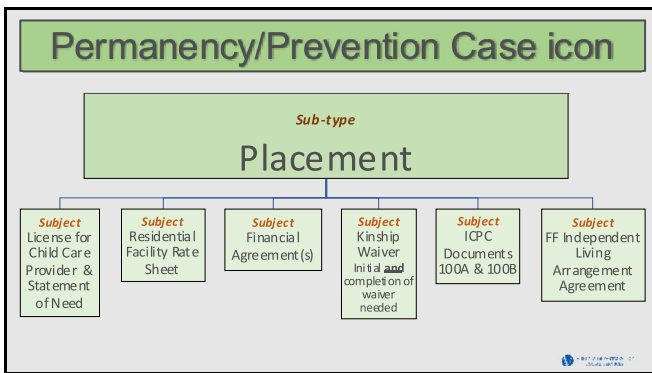


Related records

Case Participants Collaterals Contacts **Documents** Reminders Case Plans

| | Date Attached ↑↓ | Type ↑↓ | Sub-Type ↑↓ | Subject ↑↓ |
|---|------------------|---------|-------------------|--|
| <input type="checkbox"/> Select | 6/18/2024 | IV-E | Initial Screening | NOA-1/6/2024 [REDACTED] |
| <input type="checkbox"/> Select | 6/23/2024 | IV-E | Initial Screening | IV-E Application- 1/5/2024 [REDACTED] |
| <input type="checkbox"/> Select | 6/25/2024 | IV-E | Initial Screening | IV-E Evaluation- 1/9/24 [REDACTED] |
| <input type="checkbox"/> Select | 6/25/2024 | IV-E | Initial Screening | IV-E Evaluation- 1/5/24 [REDACTED] |
| <input type="checkbox"/> Select | 6/25/2024 | IV-E | Initial Screening | AFDC Documentation- SPIDeR, APECS DCSE Report [REDACTED] |

AFDC documentation: *Only* do system searches for AU members, those living in the removal home at the time of removal.

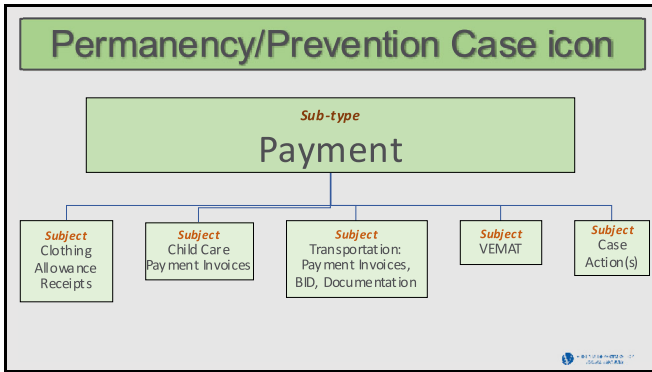


Related records

Case Participants Collaterals Contacts **Documents** Reminders Case Plans

| | Date Attached ↑↓ | Type ↑↓ | Sub-Type ↑↓ | Subject ↑↓ |
|---|------------------|---------|-------------|--|
| <input type="checkbox"/> Select | 6/23/2024 | IV-E | Placement | Child Care- The Barrow Center- License 7/27/2023-7/26/2025 |
| <input type="checkbox"/> Select | 6/23/2024 | IV-E | Placement | Statement of need for [REDACTED] |
| <input type="checkbox"/> Select | 6/23/2024 | IV-E | Placement | Financial Agreement- Ingram- 12/26/2023 [REDACTED] |
| <input type="checkbox"/> Select | 6/13/2024 | IV-E | Placement | Financial Agreement- Ingram- 2/6/24 [REDACTED] |

NOTE: Each placement change and/or change in rates, requires a NEW Financial Agreement.

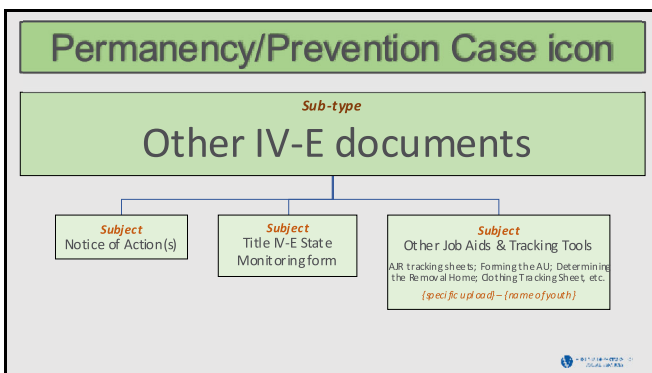


Related records

Case Participants Collaterals Contacts Documents Reminders Case Plans

| | Date Attached ↑↓ | Type ↑↓ | Sub-Type ↑↓ | Subject ↑↓ |
|---|------------------|---------|-------------|--|
| <input type="checkbox"/> Select | 6/1/23/2024 | IV-E | Payment | VEMAT score 28- 2/6/1/2024 [REDACTED] |
| <input type="checkbox"/> Select | 6/1/23/2024 | IV-E | Payment | Clothing Receipt Walmart- 12/21/2023 [REDACTED] |
| <input type="checkbox"/> Select | 6/3/25/2024 | IV-E | Payment | Child Care Invoice- The Barrow Center- [REDACTED] (1/8/24-1/31/24) |
| <input type="checkbox"/> Select | 6/3/25/2024 | IV-E | Payment | On-Going Payment, Basic and Enhanced Payments- 1/1/24 [REDACTED] |
| <input type="checkbox"/> Select | 6/3/25/2024 | IV-E | Payment | Child Care Invoice-PO- 1/8/2024 [REDACTED] |

VEMAT: Only page 1 & page 7 are required; assessment **annually or 90 days for scores 28 and higher**
VEMAT {score or amount} {effective dates} {name}



Related records

Case Participants Collaterals Contacts **Documents** Case Plans

| | Date Attached | Type | Sub-Type | Subject |
|------------------------|---------------|------|---------------------|---|
| Select | 6/2/12/2624 | IV-E | Other IV-E document | Statement from [REDACTED] regarding reasonable child care cost - 2/12/2624 - [REDACTED] |
| Select | 6/2/12/2624 | IV-E | Other IV-E document | Statement from [REDACTED] regarding reasonable child care cost - 2/12/2624 - [REDACTED] |
| Select | 6/3/12/2624 | IV-E | Other IV-E document | NOA - 64/61/2624 - [REDACTED] |

Notice of Action (NOA) – A NOA is required for any change in payment; suspension or reinstatement of payment; change in source of payment; and case closure.

How to Upload IV-E documents in COMPASS

- In the case record, scroll to the bottom of the screen.
- Click on the **DOCUMENTS** tab.

3. On the left-hand side of the screen, click the Plus sign (+) icon.

4. On the **DETAILS** screen, complete all the required fields:

- Click on the drop down to select the **Type** (ALL documentation for IV-E must be **Type IV-E**)

4. On the **DETAILS** screen, complete all the required fields:
- Click on the drop down to select the **Sub-type**

4. On the **DETAILS** screen, complete all the required fields:
- Subject** (refer to the Naming Convention document)
 - Date Received
 - Description

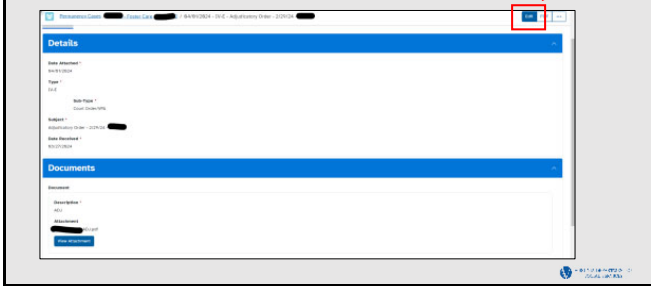
5. Go to Attachment and click on **Choose File** in the Documents section on the screen.

6. File directory dialog box will appear. Select the file to attach.

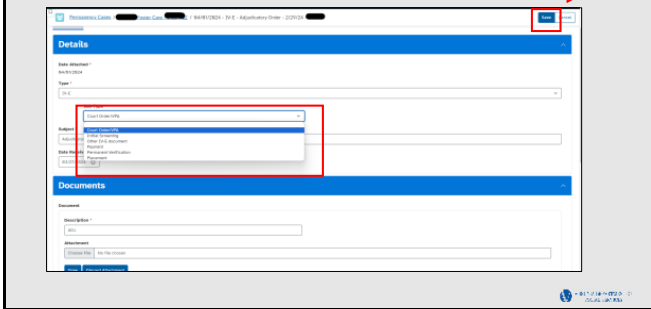
7. Click on **SAVE** in the upper right-hand corner.

How to **Change** the *Sub-type* in COMPASS

1. Select/open the document.
2. Click on **EDIT** in the upper right-hand corner.

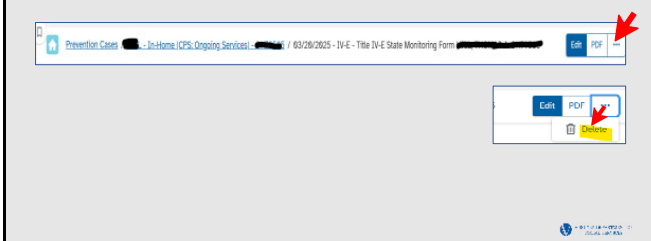


3. Select the correct *Sub-type* from the drop-down list.
4. Click on **SAVE** in the upper right-hand corner.



How to **Delete** a document in COMPASS

1. Select/open the document.
2. Click on **the three dots** in the upper right-hand corner.
3. Click on **delete**



Related records

Case Participants | Collaborate | Contacts | **Documents** | Reminders | Case Plans

Date Attached Type Sub-Type Subject

Search Documents

Date Attached

Type

Sub-Type

Media Type

Subject

Date Received

Notes

Filtering

To filter for IV-E documents...

1. Click on the Funnel icon
2. Choose and select the appropriate *Sub-type*
3. Click on Search

Search Documents

Date Attached

Type

Sub-Type

Media Type

Subject

Date Received

Notes

Sub Type, Media Type

| | Date Attached <input type="text"/> | Type <input type="text"/> | Sub Type, Media Type <input type="text"/> | Subject <input type="text"/> |
|---------------------------------------|------------------------------------|---------------------------|---|------------------------------|
| <input type="button" value="Select"/> | 06/13/2022 | IV-E | Initial Screening | Title IV-E Application |
| <input type="button" value="Select"/> | 06/13/2022 | IV-E | Initial Screening | Title IV-E Evaluation |
| <input type="button" value="Select"/> | 06/13/2022 | IV-E | Initial Screening | AFSC Documentation |
| <input type="button" value="Select"/> | 06/13/2022 | IV-E | Initial Screening | Notice of Action - SPS |

NOTE: Only documents saved as *Type IV-E* have a *Sub-type*.

If a document was uploaded under any *Type* other than IV-E, it will not display when searching by *Sub-type*.

| Type <input type="text"/> | Sub Type, Media Type <input type="text"/> | Subject <input type="text"/> |
|---------------------------|---|------------------------------|
| IV-E | Placement | Placement Agreement |
| IV-E | Placement | Placement Agreement |
| IV-E | Placement | Placement Agreement |
| IV-E | Placement | Placement Agreement |
| IV-E | Court Order/HR | Petition (Affidavit) 194 |
| IV-E | Court Order/HR | Petition (Affidavit) 194 |
| IV-E | Court Order/HR | Permanency Planning |
| IV-E | Court Order/HR | Permanency Planning |

| Type <input type="text"/> | Sub Type, Media Type <input type="text"/> | Subject <input type="text"/> |
|---------------------------|---|------------------------------|
| Other Document | Placement | Financial Agreement - 1 |
| Other Document | Placement | Financial Agreement - 1A |
| Other Document | Placement | Financial Agreement - 1 |
| Other Document | Placement | Financial Agreement - 1 |
| Other Document | Placement | Financial Agreement - 1A |
| Other Document | Placement | Financial Agreement - 1A |
| Other Document | Placement | Financial Agreement - 1A |
| Other Document | Placement | Financial Agreement - 1A |

Text box search/filter

By typing a word in the **Subject** text box, COMPASS will automatically start filtering the documents. This feature can be extremely helpful when there are sibling groups.

NOTE: When filtering via the **Subject** text box...less is more!

Search Documents

Date Attached: [dropdown]
 Type: [dropdown]
 Sub-Type: [dropdown]
 Media Type: [dropdown]
Subject: Initial Screening
 Date Received: [dropdown]

Related records

| Date Attached | Type | Sub Type, Media Type | Subject |
|---------------|-------------------|----------------------|-------------------|
| 10/19/2024 | Initial Screening | Initial Screening | Initial Screening |
| 10/19/2024 | Initial Screening | Initial Screening | Initial Screening |
| 10/19/2024 | Initial Screening | Initial Screening | Initial Screening |
| 10/19/2024 | Initial Screening | Initial Screening | Initial Screening |

Sort...by Date Attached

Related records

Case Participants Collaterals **Documents** Reminders Case Plans

Date Attached Type Sub Type, Media Type Subject

| Date Attached | Type | Sub Type, Media Type | Subject |
|---------------|-------------------|----------------------|-------------------|
| 10/19/2024 | Initial Screening | Initial Screening | Initial Screening |
| 10/19/2024 | Initial Screening | Initial Screening | Initial Screening |
| 10/19/2024 | Initial Screening | Initial Screening | Initial Screening |
| 10/19/2024 | Initial Screening | Initial Screening | Initial Screening |
| 10/19/2024 | Initial Screening | Initial Screening | Initial Screening |
| 10/19/2024 | Initial Screening | Initial Screening | Initial Screening |
| 10/19/2024 | Initial Screening | Initial Screening | Initial Screening |
| 10/19/2024 | Initial Screening | Initial Screening | Initial Screening |
| 10/19/2024 | Initial Screening | Initial Screening | Initial Screening |
| 10/19/2024 | Initial Screening | Initial Screening | Initial Screening |

When all else fails, sort...by Subject

Related records

Case Participants Collaterals **Documents** Reminders Case Plans

Date Attached Type Sub Type, Media Type **Subject**

| Sub Type, Media Type | Subject |
|----------------------|---------------------|
| Placement | Financial Agreement |
| Other IV-E document | Financial Agreement |
| Placement | Financial Agreement |
| Placement | Financial Agreement |
| Placement | Financial Agreement |
| Initial Screening | Financial Agreement |
| Placement | Financial Agreement |

Refer to the **Naming Convention document** to ensure you are selecting the correct **Sub-type**

Final thought.....

Follow the *Naming Convention document* and when abbreviating or using dates, be consistent!

Consistency

| | | |
|-------------|----|------------------|
| NOA | vs | Notice of Action |
| IVE | vs | IV-E |
| J. Jones | vs | J Jones |
| Allen James | vs | AJ |
| 12/24/24 | vs | 12242024 |
| 04.02.24 | vs | 4/2/24 |

It's your choice but be consistent throughout!