Child Welfare Pre-Service Training

Orientation FSFN Computer Instruction

Trainer Guide

July 2012

CWtC

PLEASE NOTE

Access to FSFN person or case information must only occur when there is a legitimate business purpose. FSFN must not be used to access any of the following:

- Persons or cases in the news, or
- Persons or cases about which you are "curious", or
- Persons or information about your own personal case, or
- Persons or cases of family members, or
- Persons or cases of friends, neighbors or acquaintances, or
- Any other persons or cases for which there is no legitimate business reason for you to access the information.

Please use common sense when accessing FSFN; if you have any questions about the appropriate use of FSFN, please contact your supervisor and/or your agency's IT Support personnel.

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To The Trainer

In the **FSFN Orientation Computer Course** learners are introduced to the Florida's SACWIS project, Florida Safe Families Network (FSFN). Learners are instructed in the process of accessing the system, concepts and terminology, available resources, the desktop and basic navigation, and the available search functions within FSFN. Learners are also advised of the confidentiality issues surrounding documentation in the FSFN case file.

Goals

During the **FSFN Orientation Computer Course**, learners will demonstrate how to:

- Locate and access the FSFN Website.

- Demonstrate the FSFN desktop and basic functions.

Knowledge Base Competencies

The following **Case Management (CM) Knowledge Base Competencies** (organized by domain) are addressed in **Orientation FSFN**:

Professional and Legal Responsibilities, Documentation Requirements:

- K6. Confidentiality regulations.

- K24. The importance of timely, accurate case documentation for agency accountability.

- K25. Multiple types, purposes, and uses of case documentation.

- K26. Benefits of formally documenting the case plan in the case record.

Safety Management, Service Planning and Delivery:

- K42. Applicable federal, state, and school-based regulations, and relevant procedures of school systems: Structure of the school system and roles of specific school personnel; Provision of special educational programs for developmentally delayed and physically disabled students; School system protocol and confidentiality issues regarding interacting with children, parents, teachers and other school-related personnel; Education rights of children; privacy rights of parents regarding school issues; Provisions of the Americans with Disabilities Act (including Individual Educational Plans) and Individuals with Disabilities Educational Act (including 409 plans) that impact

children in school; McKinney Act provisions that impact homeless children in schools.

The following **Protective Investigations (PI) Knowledge Base Competencies** (organized by domain) are addressed in **Orientation FSFN**:

Child Protection Foundations:

- K3. Knowledge of federal and state confidentiality regulations.

Planning and Teaming:

- K46. Knowledge of the role of the protective investigator to have primary responsibility for gathering, assessing, understanding, integrating, documenting, and communicating critical information throughout the investigation to all essential parties in order to ensure informed decision making.

- K47. Knowledge of which individuals/parties protected information can be shared.

Course Objectives

FSFN ~ Introduction to the Florida Safe Families Network

- Define SACWIS and FSFN.

- Explain the concepts and terminology of FSFN.

- Locate and access the FSFN Website.

- Log into FSFN.

- Demonstrate the FSFN Desktop and Basic Functions.

Participant Materials

- **PG1**   FSFN Website
- **PG2**   FSFN Web Based Training (WBT) Courses
- **PG3**   FSFN On-Line Security
- **PG4**   Confidentiality Statement
- **PG5**   FSFN - Keyboard Shortcuts
- **PG6**   FSFN Quick Reference Tool
- **PG7**   Date Restricted Time Values
- **PG8-9**   Outliner Expandos Information
- **PG10-13** FSFN Search Tips
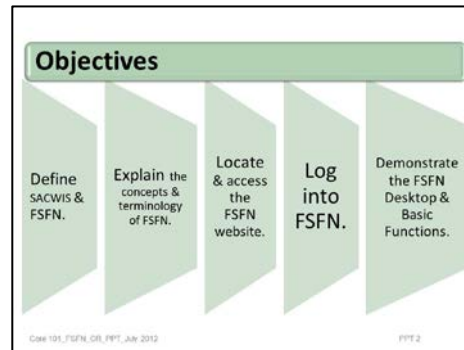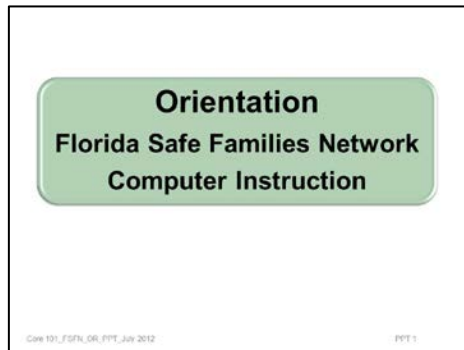- **PG14-15** Crossword Puzzle

Visual Aids

PowerPoint Slides

- **PPT1**   Orientation FSFN
- **PPT2**   FSFN ~ Introduction to the Florida Safe Families Network Objectives
- **PPT3**   What is SACWIS?
- **PPT4**   Florida's SACWIS
- **PPT5**   FSFN Supports data reporting to
- **PPT6**   NCANDS
- **PPT7**   The FSFN Case Concept
- **PPT8**   FSFN Terminology: Intakes
- **PPT9**   Case Assignment
- **PPT10** FSFN Terminology: Investigations
- **PPT11** FSFN Terminology (cont.)
- **PPT12** FSFN Website
- **PPT13** Hotline Intake and CI Unit Course
- **PPT14** Child Investigation Course
- **PPT15** Ongoing Case Work
- **PPT16** Supervisory Course
- **PPT17** Provider Course
- **PPT18** Reports Course
- **PPT19** FSFN On-Line Security
- **PPT20** Case Ownership
- **PPT21** Logging into FSFN: Password and Security
- **PPT22** FSFN Desktop
- **PPT23** Ticklers
- **PPT24** FSFN Automated Messages
- **PPT25** Outliner Expandos
- **PPT26** Messages & Links
- **PPT27** FSFN Search
- **PPT28** Searching by Case Name
- **PPT29** Types of Searches
- **PPT30** Variable Precision vs. Wildcard
- **PPT31** Other Case Types
- **PPT32** Search Activity

Introduction to the Florida Safe Families Network

- Present **PPT1 FSFN Orientation** and **PPT2, Course Objectives and review**.

Assure that all learners have reviewed and signed the Confidentiality Statement and any additional agency specific forms prior to continuing with this training.
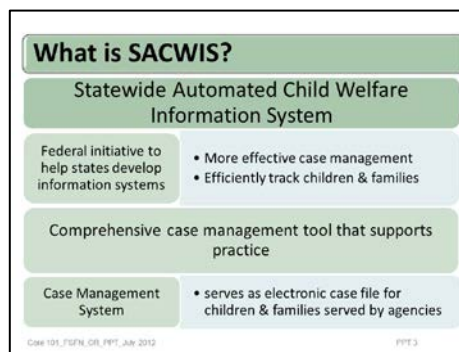
Topic ~ What is SACWIS and FSFN?

Materials

- ♦ **PPT1** Orientation FSFN
- ♦ **PPT2** FSFN ~ Introduction to the Florida Safe Families Network Objectives
- ♦ **PPT3** What is SACWIS?
- ♦ **PPT4** Florida's SACWIS
- ♦ **PPT5** FSFN Supports data reporting to
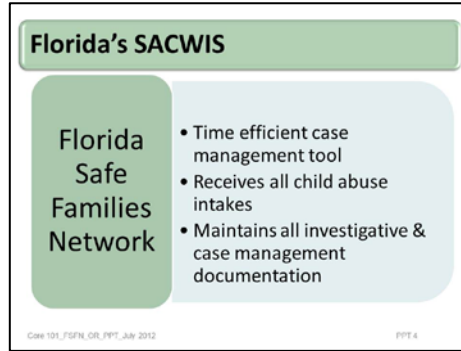
- Present **PPT3, What is SACWIS?**

- FSFN is Florida's Statewide Automated Child Welfare Information System (SACWIS).

- SACWIS allows states to remain in compliance with state and federal requirements.

Present **PPT4, Florida's SACWIS**.

Review the following bullets to provide learners with a better understanding of FSFN. FSFN:

- *stands for Florida Safe Families Network*

- *is a tool to help keep children safe and achieve permanency*

- *enables all agencies to work together to improve children's lives by providing tools to enhance the quality of case management*

- *is a comprehensive automated case management tool supporting best practice*

- *integrates various aspects of case practice in a single statewide system*

- *is the official system of record for Florida and the official "case file"*

Tell learners: All case work practice and policy must be documented in the FSFN case file.

Present **PPT5-6, FSFN Supports Data Reporting** to:
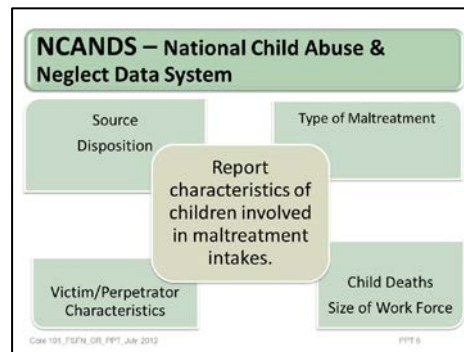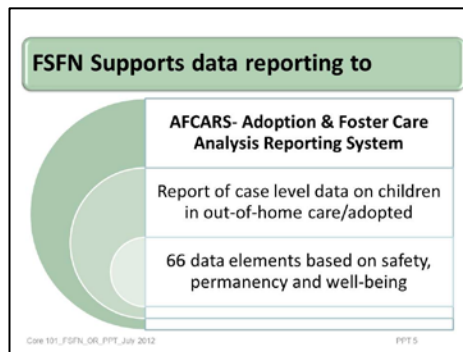
- Example of an AFCARS data element: All active children in a removal episode must have a documented "Reason for Removal" i.e. Physical Abuse, Inadequate Supervision, etc.

- Example of an NCANDS data element: In an Investigation, Maltreatment(s)/Perpetrator(s) must be documented.

- For further information regarding NCANDS or AFCARS please refer to: http://www.acf.hhs.gov/programs/cb/systems/index.htm#ncands

  http://www.ndacan.cornell.edu/

All AFCARS and NCANDS data elements in FSFN are in Red text.

Topic ~ FSFN Concepts and Terminology

Materials

- ♦ **PPT7** The FSFN Case Concept
- ♦ **PPT8** FSFN Terminology: Intakes
- ♦ **PPT9** Case Assignment
- ♦ **PPT10-11** FSFN Terminology: Investigations

Advise learners of the terms used by FSFN.

- Present **PPT7, The FSFN Case Concept**
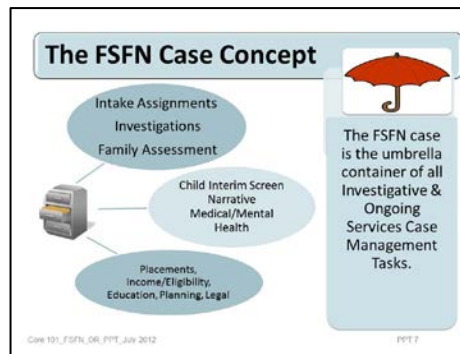
- Present **PPT8, FSFN Terminology: Intakes.**
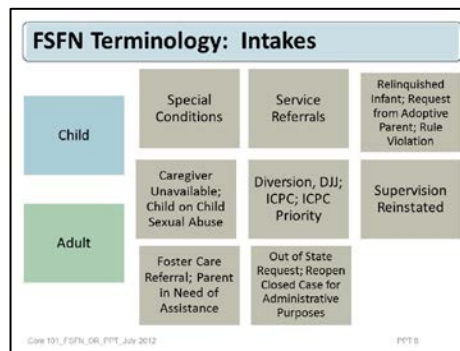
Intakes

- Intakes - created for calls received by the abuse hotline.

- Intakes requiring investigation are forwarded to the CI (Criminal Intelligence) Unit of the hotline for completion of criminal background checks.

Advise learners that they must learn their specific agency process regarding criminal background checks.

- Display **PPT9, Case Assignment.**

Case Assignment

More than one intake may be linked to a case.

↓

PIs receive intake and create an investigation.

↓

Intake/Investigation #s are the same – different than the case ID #.

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- Display **PPT10 - 11 FSFN Terminology: Investigations.**

FSFN Terminology: Investigations

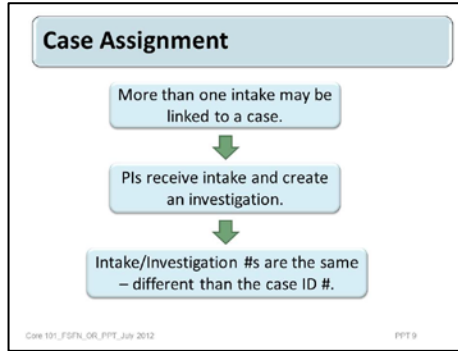| Child Investigations	In-Home: Child is being mistreated by caretaker in the home	Institutional: Child is in licensed setting, public school etc. and is being mistreated by an employee
Special Condition Referrals	Request for Assistance Referral- no maltreatment, request for help	Child on Child Sexual Abuse Referral: sexual assault on a child, by a child	Foster Care Referral: issues in licensed setting
Adult Investigations		

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Advise learners that they are exposed to examples of all of the above throughout the curriculum, as well as during the field component of their training.

FSFN Terminology (cont.)

2 Placement Types	• Living Arrangement – In-Home cases • Judicial and Non-Judicial • Out-of-Home – approved and/or licensed out-of-home care
Providers:	• Organizations/Individuals that offer placement, treatment services, child based services
Participants	• Any person active or inactive in the investigation or case
Narrative	• Narrative - includes all types of notes • child/adult investigation • special conditions • case • legal • Independent living • Provider Narratives are entered as provider work and display under the provider's expando
Worker	• People cleared to access case specific information and are responsible for case management, investigation and other related services.

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Topic ~ FSFN Website

Materials

- **PG1** FSFN Website
- **PG2** FSFN Web Based Training (WBT) Courses
- **PPT12** FSFN Website
- **PPT13** Hotline Intake and CI Unit Course
- **PPT14** Child Investigation Course
- **PPT15** Ongoing Case Work
- **PPT16** Supervisory Course
- **PPT17** Provider Course
- **PPT18** Reports Course
- Present **PPT12, FSFN Website**

Direct the class to access the website, either through Internet Explorer by typing in the URL address in the address bar OR by a designated icon on their Desktop icon.

Refer the class to PG1, FSFN Website ⭐ (PG page inserted on the following page TG6) and review:

FSFN Website
FSFN Resources/Information

- FSFN Online
    - Location of training sandbox, security forms, user profile information
- FSFN Reports
    - Contains information about the reports in FSFN
- Training
    - Location of web based training, User Guides, How Do I Guides, Job Aids and Site Contacts
    - User Guides and How Do I Guides must be referenced prior to calling the Helpline.

These demos should be completed by you at your own pace:
- Forms
- Desktop Changes
- Meetings
- Person Merge and Delete
- Unified Home Study

Agendas, Minutes and Reports
- Information regarding helpdesk reports, meetings, status reports and conference calls

Technical Information
- Includes information on the system and how to create shortcuts, etc.

FSFN Contacts
- Contact information for FSFN personnel; workers are never to contact CGI directly.

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Training

Direct the class to complete these on line demos at their own pace. The list includes demos such as:

- Forms
- Desktop Changes
- Meetings
- Person Merge and Delete
- Unified Home Study

Agendas, Minutes and Reports

- Information regarding helpdesk reports, meetings, status reports and conference calls

Technical Information

- Includes information on the system and how to create shortcuts, etc.

FSFN Contacts

- Contact DCF Helpdesk: (850) 487-9400 for assistance with FSFN related issues

Direct learners to click on the FSFN Web Based Training Course hyperlink in the Training section of the website. Advise learners there is 24-hour availability.

Refer the class to **PG2, FSFN WBT Courses** (PG page inserted on the following page TG8).

FSFN Web Based Training Courses

Hotline Intake and CI Unit Course

- procedures for child and adult intake
- other intake and referral processes
- criminal background check

Child Investigation Course

- using FSFN in the receiving unit and for on call schedules
- documenting investigative processes and findings, for In-Home and institutional investigations
- completing special conditions referrals and child on child assessments

Ongoing Case Work Course

- using FSFN in day to day case work
- completing Service Referrals
- documenting service provision
- Interim Child Screen information
- Living Arrangements and Out-of-Home placements
- creating providers
- completing the Medical/Mental health profile

Supervisory Course

- using supervisor security profile to transfer cases
- closing cases
- performing the approval process in FSFN
- managing unit messages and links

Provider Course

- using the Provider module to create service and placement providers
- updating provider information
- assigning providers to workers

Reports Course

- using the Business Objects reporting tool interfaced with FSFN to access management, performance and financial reports generated from FSFN data

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- Display **PPT13-18** and review the additional Information regarding these on-line courses:

Hotline Intake and CI Unit Course

- Procedures for Child and Adult Intakes
- Other Intake and Referral Processes
- Criminal Background Checks

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Child Investigation Course

Using FSFN in the receiving unit & on call schedules:

- Document investigative processes & findings.
- Complete Special Conditions Referrals and Child on Child Assessments.

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Ongoing Case Work

Using FSFN in Day to Day Case Work

- Service Referrals
- Document service provision
- Interim Child Screen information
- Living arrangements & Out-of-Home placements
- Create provider
- Complete Medical/Mental Health profile

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Supervisory Course

- Use supervisor security profile to transfer cases
- Close cases
- Perform approval process on various FSFN items
- Manage unit messages and links

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Provider Course

Use provider module to create service & placement providers.

Update provider information.

Assign providers to workers.

Core 101_FSFN_OR_PPT_July 2012   PPT 17

Reports Course

Use the Business Objects reporting tool interfaced with FSFN to:

- access management, performance, and financial reports generated from FSFN data

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Topic ~ Logging into FSFN

Materials

PG3 FSFN On-Line Security

PG4 FSFN Confidentiality Statement

PPT19 FSFN On-Line Security
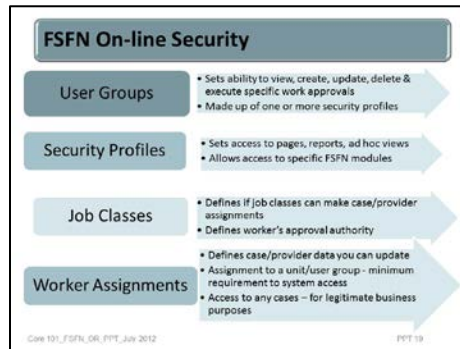
PPT20 Case Ownership

PPT21 Logging into FSFN

Refer learners to the On-Line section of the FSFN website to access the FSFN Training Sand box.

The computers should have the site as a Desktop icon. Identify the icon for the learners.

Advise the class that security is necessary to ensure that only authorized users have access to the information required to perform the work related to their job class.

- Display **PPT19, FSFN On-Line Security** and discuss. This Information is

  also on **PG3, FSFN On-Line Security** ⭐ **(PG3 page inserted on the following page TG11).**

FSFN On-line Security

User Groups	• Sets ability to view, create, update, delete & execute specific work approvals • Made up of one or more security profiles
Security Profiles	• Sets access to pages, reports, ad hoc views • Allows access to specific FSFN modules
Job Classes	• Defines if job classes can make case/provider assignments • Defines worker's approval authority
Worker Assignments	• Defines case/provider data you can update • Assignment to a unit/user group - minimum requirement to system access • Access to any cases – for legitimate business purposes

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FSFN On-Line Security

User Groups
- Determine the user's ability to access pages and reports.
- Determine the user's ability to view, create, update, delete information and to execute approvals of specified pieces of work.
- Made up of one or more security profiles.

Security Profiles
- Defines security for one or more system resources and can be pages and/or reports.
- Identifies the types of system resources (pages, reports, ad hoc report views) that are accessible.
- Allows access to specific FSFN modules and related data.

Job Classes
- Defined in the system with designation if users with a specific job class can make case and provider assignments.
- Defines the level of approval authority.

Worker Assignments
- Defines the specific case or provider that can be updated.
- Not every worker receives FSFN assignments, so the assignment of the worker to a unit/user group is the minimum requirement to gain access to the system.
- FSFN associates every authorized user by linking their unique Florida user ID to a corresponding unique FSFN Employee ID.
- The user is associated with one or more worker unit assignments; which is associated to a user group with one or more security profiles.
- Each security profile contains the pages that the worker unit assignment can view and/or modify.

Employee Definition
The employee definition contains specific information about the individual employee:
- Login ID
- Work contact information
- Unit assignments
- Job class
- Security user group

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Florida User ID and FSFN Employee ID

- FSFN associates every authorized user by linking their unique Florida user ID to a corresponding unique FSFN Employee ID.

- The user is associated with one or more worker unit assignments; which in turn is associated to a user group with one or more security profiles.

- The employee definition contains specific information about the individual employee:

  - **Login ID**

  - **Work contact information**

  - **Unit assignments**

  - **Job class**

  - **Security user group**

Management reports reflect "real" data from the production region of FSFN. Displaying this information in a classroom setting may be a violation of learners' confidentiality and that of their coworkers.

The FSFN training curriculum was developed for training region functionality and live data from the system is not to be incorporated into the curriculum.

- Display **PPT20, Case Ownership**

Case Ownership

Controls Access

- Security restrictions are tied with your case or provider assignments.
- Only workers actively assigned to a case (or supervisors/acting supervisors w/Primary role) can update a provider/case.

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Refer learners to the PG4, FSFN Confidentiality Statement ⭐ (PG page is inserted on the follow page TG14) and have all learners sign and return. Reiterate to learners that access to FSFN person or case information must only occur when there is a legitimate business purpose. FSFN must not be used to access any of the following:

- *Persons or cases in the news, or*

- *Persons or cases about which you are "curious", or*

- *Persons or information about your own personal case, or*

- *Persons or cases of family members, or*

- *Persons or cases of friends, neighbors or acquaintances, or*

- *Any other persons or cases for which there is no legitimate business reason for you to access the information.*

Please use common sense when accessing FSFN; if you have any questions about the appropriate use of FSFN, contact your supervisor and/or your agency's IT Support personnel.

Once the FSFN user has logged into FSFN, their activity within the system is tracked. Misusing or abusing the FSFN system could result in immediate termination.

Confidentiality Statement

Please read the following statement and provide your signature in the space indicated.

Florida Safe Families Network (FSFN) Confidentiality Notice:

Florida Safe Families Network is Florida's method of receiving child abuse reports, documenting investigations, and recording all casework services provided to protect children. Florida Safe Families Network contains confidential and privileged information not to be shared with anyone unless authorized as defined in Chapter 39.202 F.S. Additionally, authorized individuals may only access those records for which there is a work related need to know.

_____

Print Name   Signature

_____

Date   Position/Agency   Circuit

PPT

- Display **PPT21, Logging into FSFN**.

Logging into FSFN: Password & Security

Minimum 6 alpha/numeric characters

Expires in 45 days

Cannot repeat previous passwords

Lockout occurs after 3 unsuccessful attempts

Helpdesk unlocks accounts/resets passwords
(800)352-4771 or (850)487-9400
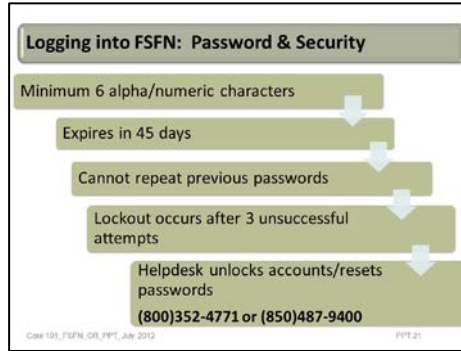
Advise the class to carefully enter passwords and to let you know if they have two failed attempts. They need to obtain your assistance prior to the third attempt as the system freezes upon the third failed attempt.

Training Site Log In and User Code

- Provide learners with their usernames and passwords. Each Training Site has different logins. An example of a Training FSFN login is: **username:** usf1234 **password:** usftraining. Each FSFN user has a Login ID and password.

- Advise the class to enter user name and password and **click** submit. The learner will see their FSFN Desktop.

Training sites may differ regarding how learners obtain a User Profile for accessing the FSFN Desktop. Please adjust the curriculum according to your agency's policy relating to "logging into FSFN." This is not their "real production" login.

Review the following topic while learners view the actual system.

Topic ~ Desktop and Basic Functions

Materials

- ♦ **PG5** FSFN - Keyboard Shortcuts
- ♦ **PG6** FSFN Quick Reference Tool
- ♦ **PG7** Date Restricted Time Values
- ♦ **PG8-9** Outliner Expandos Information
- ♦ **PG10-13** FSFN Search Tips
- ♦ **PG14-15** Crossword Puzzle
- ♦ **PPT22** FSFN Desktop
- ♦ **PPT23** Ticklers
- ♦ **PPT24** FSFN Automated Messages
- ♦ **PPT25** Outliner Expandos

♦ **PPT26** Messages & Links

♦ **PPT27** FSFN Search

♦ **PPT28** Searching by Case Name

♦ **PPT29** Types of Searches

♦ **PPT30** Variable Precision vs. Wildcard

♦ **PPT31** Other Case Types

♦ **PPT32** Search Activity

Refer the class to PG5, FSFN Keyboard Shortcuts to copy and paste *shortcuts.* **(PG page inserted on the following page TG17).**

- Present **PPT22, FSFN Desk Top**.
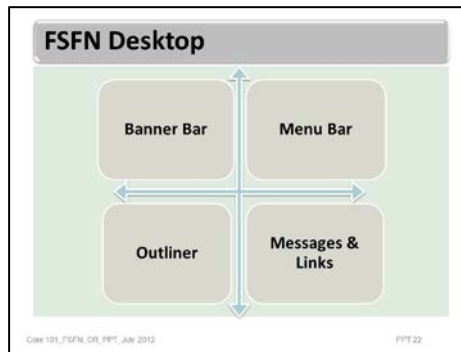
Refer the class to **PG6, FSFN Quick Reference Tool.** **(PG page inserted on the following page TG18).**

FSFN - Keyboard Shortcuts

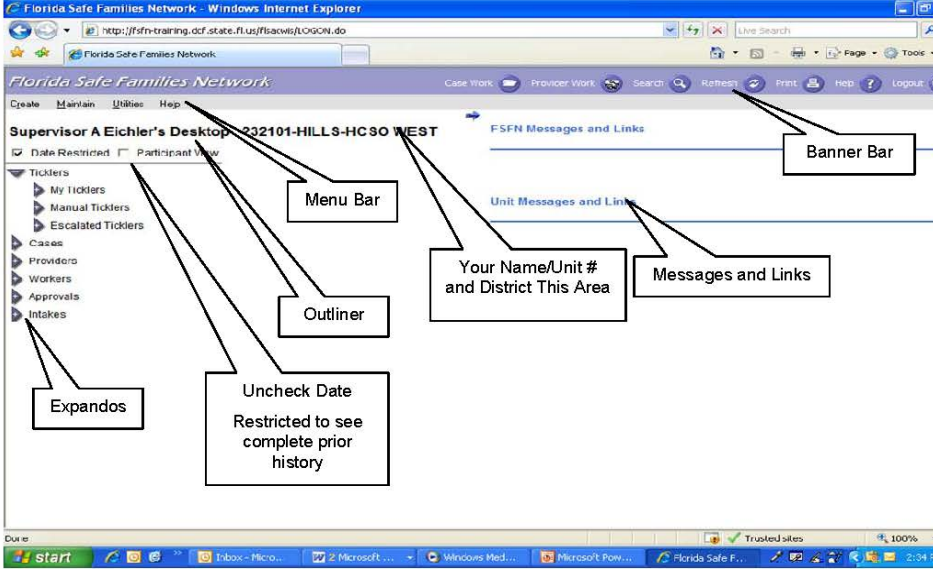|		
Copy Text	In the appropriate text box, highlight the text using your mouse. Hold down the Ctrl and C keys on the keyboard.	You may also copy text from word processing documents to FSFN using these steps.
Paste Text	In the destination text box, place the cursor in the box by single clicking. Hold down the Ctrl and V keys on the keyboard.	You may also paste text from FSFN into word processing documents using these steps.
Print Screen	Instead of selecting Print icon on the banner, hold down the Ctrl and P keys on the keyboard.	This action prints the displayed page.
FSFN Logoff	Instead of selecting Logout icon on the banner, hold down the Alt and F4 keys on the keyboard.	This action logs out of FSFN system application.
Move to Next Field	Place your cursor in a field on the page. Select the Tab key.	This places your cursor in the next user-entered field.
Move to Previous Field	Place your cursor in a field on the page. Hold down the Shift key and select the Tab key.	This places your cursor in the previous user-entered field.
Select a Check Box	Select the Tab key to navigate to the correct check box, and then select the space bar to check the desired value. Select the Tab key to move to the next field.	This selects a checkbox.
Select Values From Dropdowns	To highlight a value from a long drop down list, select the first letter of your desired value.	If the desired value is further down the list, you can also use the Down arrow.
Select Buttons or Tabs	Hold down the Alt key and the key for the underlined letter of the button or tab you want to select. Alt S = Save Alt C = Close Alt I = Insert	For example, since Create displays with the „C" underlined, hold down the Alt and C keys on the Keyboard.
Switch From FSFN to Other Application	Hold down the Alt and Tab keys. Displays a menu of open applications to choose from. Holding down the Alt key, keep selecting the Tab key until you have selected the page to be displayed.	This allows multiple windows to be open and to quickly toggle between application/windows.

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FSFN Quick Reference Tool

Help	
Search	
Print screen	
Case work	
Provider work	
Audit	
Refresh	
Log out	
Error	

📁 **Cases Expando**

Use this tab to view and update cases assigned to you and the work associated with these cases.

🤝 **Providers Expando**

Use this tab to view and update work related to Providers assigned to you.

♟ **Workers Expando**

For Supervisors: Use this tab to view the Workers assigned to you and the Cases and Providers assigned to your workers.

✔ **Approvals Expando**

Use this tab to view and access pieces of work that are in the approval process or have been approved within the last 48 hours.

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Introduction to the Florida Safe Families Network

Desktop

Instruct the class to start clicking on Banner Bar and Menu options as you discuss each function.

Banner Bar

Refer the class to the Banner Bar and provide explanation of the functions.

- Banner Bar - provides buttons to launch work common to any window in the system:
    - Case Work - to create pieces of work within the case.
    - Financial Work - allows financial staff access to create financial work in the case.
    - Provider work - to maintain or update a provider record in the system.
    - Search - to search for a case, person, provider, worker.
    - Refresh - resets the FSFN Desktop; modifications made to the case are available.
    - Print - performs a print screen of the active page.
    - Spell check - initiates the spell check function available on all pages where narrative text boxes exist.
    - Audit - opens the audit pop up page, not available on the desktop but available on most other pages.
    - Handbook - links users to DCF Policy and Procedures; not available on the outliner, but available on pages where narrative text boxes exist.
    - Help - displays the help topic for the active page.
    - Logout - logs the user out of the FSFN application.

Menu Bar

Review the Menu Bar and provide explanation of the functions.

Menu Bar - provides menus to create and maintain work in FSFN as well as menus for utility and Help Pages.

- Directly below the Banner bar
- Provides dropdown menus to create and maintain work in FSFN
    - Create
    - Maintain
    - Utilities
    - Help

Refer learners to the Outliner and provide explanation of the functions.

Outliner

Worker's name and unit appears underneath the Menu Bar

Most often used area on the Desktop

Due to potential overload of data, has two possible views:

- Date restricted - displays the last 30 days of work in the Outliner
- Participant View - displays the work in the Outliner by case participant instead of by pieces of work

Expandos - blue triangles in the outliner section

Ask the class to click on the various expandos as each is reviewed

Organize work in outline format, each covering a different subject

Can be opened to show additional information

- Plus Sign - not expanded
- Minus Sign - is expanded

Icon symbols appear on the first level when work has been created in that area.

Selecting the icon symbol expands it to another level.

Selecting the piece of work takes the user to the screen where the work was completed.

Refer the class to **PG7, Date Restricted Time Values** ⭐ **(PG page inserted on the following page TG21).**

Date Restricted Time Values

When Date Restricted is checked on the Outliner, the work displays according to following timelines:

Case Expando > Icon	Displays
Investigations	Most recent **24 months**
Special Conditions Referral	Most recent **24 months**
Assignment	Assignments for the most recent **1 month**
Family Assessment	Most recent **24 months**
Medical/Mental Health	Most recent **6 months**
Narrative	Most recent **3 months**
Ongoing Services (Interim Child Information Only)	No date restrictions
Placement/Services	No date restrictions for Open Placements. Closed placements display for the most recent **24 months**, except for out-of-home Placements with an Ending Reason of "Placement Made in Error." These do not appear in Date Restricted view, but display when "Date Restricted" is unchecked.
Intake	Unassigned work for the most recent **12 months**
Education	Work for the most recent **6 months**
Missing Child Record	Missing Child Record information until the record is closed, or until it expires (system automatically sets expiration date to 18 years from date of final approval.
Planning	Work for the most recent **24 months**
Alerts	Alerts created for case participants until the Alert is closed or expires. Is a red 'A' over the case icon expando while an active Alert exists for the case. System generates a view-only alert when a Missing Child Record is created and approved.
File Cabinet	Documents scanned into FSFN for the case/case participants for the most recent **12 months**

Review the information pertaining to the timeframes for date restricted data. This feature is discussed and explained further in the upcoming Search Activity.

Ticklers

Ticklers - designated by a feather

To do lists or reminders for work needing completion and upcoming activities/events/associated due dates

First expando displayed upon logging into FSFN is already expanded to show expandos:

- My Ticklers

- Manual Ticklers

- Escalated Ticklers

- Display **PPT23, Ticklers**

- Present **PPT24, FSFN Automated messages**.

For automated messages to work properly, a valid email must be submitted on FSFN security paperwork. This function is not available in the training region.

View a Tickler from the Desktop

➢ Advise class to click **My Ticklers** expando to view the tickler.

- The name of the case displays with the first date a piece of work is due.

➢ Click the **Case Folder** icon to view pieces of work and the due dates.

Create a Manual Tickler

➢ Click **Maintain** in the Menu bar.

➢ Click **Manual Ticklers**.

➢ Click **Insert.**

➢ Enter a Start Date with the format 0101XXXX - no slashes or dashes.

Right Click on the Date Field and a Calendar tool is available.

➢ Enter an **End Date.**

End date is the last date that the tickler appears on the Desktop and displays on the desk top after the message. It can be set as the due date or a true end date.

No one else has access to the user's manual ticklers.

➢ Enter a Message **"Pierce Case Plan is due Friday."**

➢ Click **Save** and click **Close**.

➢ Click **Refresh** icon on the **Banner Bar**. Click **"Yes"** in dialogue box.

➢ Expand the **"Manual Ticklers"** expando to see your Manual Ticklers.

Remove a Tickler from the Desktop

➢ Click **Maintain** in the menu bar.

➢ Click **Manual** ticklers and click the **completed box**.

➢ Click **Save** and **Close**.

➢ **Refresh** your **Desktop**.

➢ **Expand** your Manual Ticklers expando and you will see the tickler has been removed

Delete a Manual Tickler

➢ Click **Maintain** in the menu bar.

➢ Click **Manual** ticklers. **(You will need to create another tickler to complete the delete tickler process.)**

➢ To delete a tickler that will not be re-used, click **Delete** and click **"Yes"** on the pop-up screen verifying intention to delete.

➢ Click **Save**.

➢ Click **Close**.

➢ Refresh your **Desktop**. There are NO ticklers listed under the **Manual** tickler expando.

➤ **Expand** the **Manual** ticklers expando and note that the tickler no longer exists.

Outliner Expando

- Continue with a review of the remaining Outliner expandos by displaying **PPT25, Primary Outliner Expandos**.

- Refer class to **PG8-9 Outliner Expandos** Information for review as you discuss. ⭐ (**PG pages inserted on the following pages TG25-27).**

Primary Outliner Expandos

Cases	View, update assigned cases &tasks View all cases managed by worker/sup. T code: restricted (report on an employee)
Providers	Work related to assigned providers Assigned to workers as they create relative placements/other providers
Workers	Supervisors only View assigned workers, cases & providers
Approvals	View/access work in the approval process or approved w/n the past 48 hrs
Intakes	View intakes: Hotline or Service Referrals and those not yet called out/lined to case

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⚠️ *Create a unit message prior to class or during break so learners can view.*

- Refer the class to **PPT26, Messages and Links** and provide explanation of the functions.

Messages & Links

Notifications: From FSFN Project , DCF Headquarters, Helpdesk
- System downtime
- New application functionality
- Policy/program changes
- Missing AFCARS
- Necessary or helpful information: i.e. training bulletins

Unit Messages and Links (Unit specific)
- Generated by supervisor
- Unit-wide messages & announcements
- Deadlines
- Assignments
- Meetings
- Links to sites

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- Refer the class to the **Viewing Arrow**. (Blue Arrow directly above Unit Messages & Links)

- Click **Viewing Arrow (Expand Right)**.

- The Unit Messages and Links are no longer available on the **Desktop**.

- Click **Viewing Arrow** again **(Undo Expand)** and the Unit Messages and Links appear on the **Desktop** again.

Outliner Expandos Information

Outliner Expandos:

- Cases:
- Used to view and update assigned cases and associated work tasks
- Displays all cases managed by a worker and/or supervisor
- Case Name
- Case Type
- Most Recent Investigative Subtype
- Case Status
- Most Recent Intake Received Date
- County
- Case Address
- Displays and provides access to all case work by subject area in reverse chronological order, including case activity notes, by work subject in the following order:
  - Related People
  - Intakes
  - Remaining Case Work Categories in alphabetical order
  - T code - restricted (report on an employee)

Providers - work related to assigned Providers:

- Workers have providers assigned as they create relative placements or providers created for institutional investigations.

Worker - Supervisors only:

- Supervisors can view their assigned workers and assigned cases and providers
- Only on Supervisor's desktop

Approvals:

- Used to view and access work that is in the approval process or has been approved within the past 48 hours
- Used to store/display required approvals and related actions
- Displays work items (generated by the user) for which approval has been requested, as well as those requiring review for approval by the user

Intakes:

- Used to view intakes created by a worker (Hotline or Service Referrals)
- Displays intakes that have not been called out and/or linked to a case

- Lists:
  - Child Intakes
  - Adult Intakes
  - Special Condition Intakes
  - Service Referrals
  - Person Provider Inquiries
  - Intake type
  - Intake Name
  - Date the Intake was created
  - Worker who created the Intake
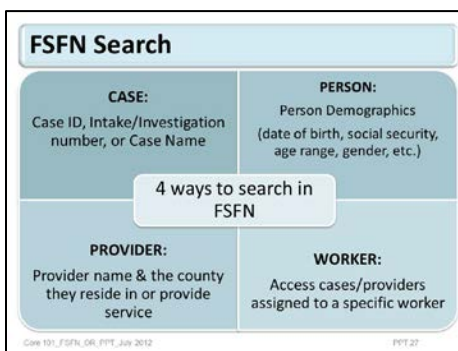 - Designated Response Time

Call Records:

- Automatically created when information captured in Phoenix is pushed to the Web Service, through the Phoenix interface.
- Provided to minimize the Hotline counselor's workload when received call is certain type (i.e. hang up, message, etc.)
- The Hotline counselor creates an Intake page and links the Intake to a Case for those Screened Out calls that don't meet criteria for a report.
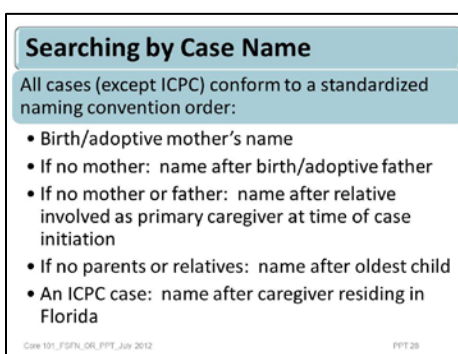
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Search

- Refer the class to **PPT27, FSFN Search.**

- Display **PPT28, Searching by Case Name** and advise class of the naming convention used for searching:

Search Instructions

There are 2 ways to search:

- Banner bar "Search"

- Menu bar "Utilities" and "Search"

➢ Click **Search** in the Banner bar.

➢ You will conduct a **Case Search**; the first Search Tab.

➢ Ask class to type in case name: Last name **Seed**, first name **Tessa**.

➢ Move Search Precision to **High**.

➢ Click **Search**.

You are having the class purposely misspell the last name to demonstrate a validation error.

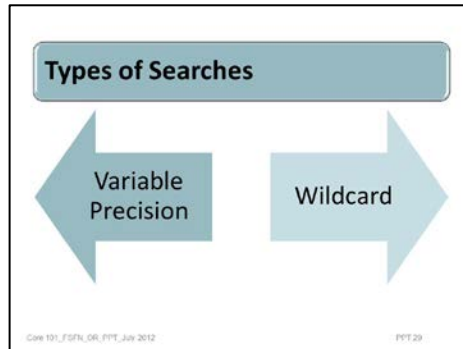*A dialog box displays Validation Errors...No matching data found…*

➢ Click **Close**.

When completing a search and locating a case, there is "view" only access without case assignment. If case assignment is made, the case information can be "edited." The amount of case information that can be "viewed" and/or "edited" varies based on security profiles.

- Present **PPT29, Types of Searches**.

- Display **PPT30, Variable Precision vs. * Wildcard**.

> Type **Seed** in last name and **Tes*** in first name.

> Uncheck the **"Date Restricted"** check box**. Refer to PG7, Date Restricted Time Values**. The Search screen refreshes automatically and a search result is found. *(PG page inserted on the following page TG28).*

- The **Date Restricted** is designed to limit the size of a "search" for a specific type of record or action, e.g. a chrono note (narrative), an educational document, a medical record, an investigation, etc.

- The intent of this feature is to limit the time and the volume of documents pulled as a result of a search.

- This is used when you only want recent information, such as case work within the most recent 6 months.

- If you do not want to limit the timeframe of the search, uncheck the Date Restricted box to remove the limits and search the entire life of the case.
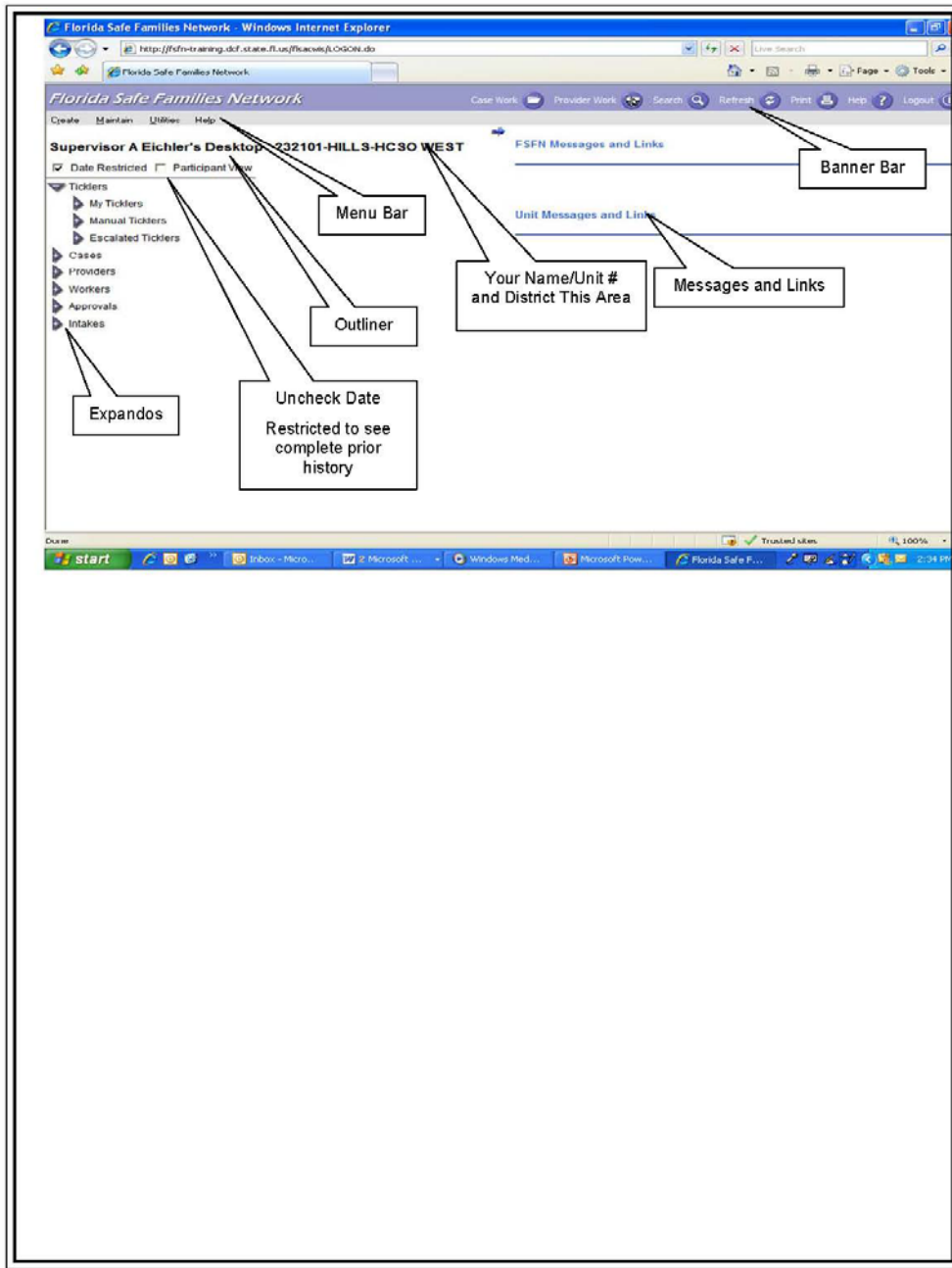
➢ In the **Cases Returned Group** box:

➢ Expand the **Seed, Tessa** case. (the yellow case folder)

- Explain and direct class to the information under case name:

  - Type of Case: **Investigation**

  - Case Status and Status Date: **Open**

  - The **Primary Worker** and unit information

  - The Case Address

- Display **PPT31, Other Case Types**.

When expanded, the Seed, Tessa case displays the following icons. Advise the class to click on each icon as you discuss the information in each.

Related People - displays all members of the case

Intakes - displays intakes/abuse reports that have been accepted by the hotline

Assignment - displays all assigned workers

Interim Child Information - displays hyperlinks allowing access to child information

The Interim Child Icon is present for many cases; however, it has been replaced with new functionality and the Interim Child Information is no longer updated. The Interim Child Hyperlinks (which are disabled) are view only and consist of: eligibility, legal status, goal, judicial review and adoption factors.

Investigation - displays a blue hyperlink allowing access to the PI case investigation documentation

Medical/Mental Health - displays hyperlinks associated with each case participant:

- Medical and mental health information must be obtained for any case participant including:

- name of physician and dentist

- prescribed medications

- medical history

- any mental health diagnoses

Narrative - displays case and investigation chronological notes

The narrative outliner only displays narratives that have been entered within the last 3 months if the date restricted box is checked.

Placement/Services - contains all the placement history for active and inactive children within the case

Search Using a Person ID with the Seed Case

With the Tessa Seed case already expanded:

➢ Click the **Related People** Icon.

➢ Highlight the **Person ID** number for **Seed, Daisy**. (Person ID is in parentheses, next to the person's name)

➢ Press **CTRL C** to copy the **Person ID** number.

➢ Click the Person Tab in Search (remove any old information).

➢ Press **CTRL V** and paste the **Person ID** into the **Person ID** Box.

➢ Click **Search** or **Enter**.

➢ A person returned is Seed, Daisy.

➢ Expand Seed, Daisy person icon.

➢ Return to **Case Tab** on **Search** Screen.

Search Using an Intake Number (use the Seed case)

➢ Click the **Intake** Icon.

➢ Write down the **Intake Number** (2007501092).

➢ On the Case Tab in Search (remove any old information).

➢ Enter the Intake Number into the **Intake #** text box.

➢ Click **Search**.

➢ The **Seed, Tessa** case is in the Case Returned group.

➢ Expand the Seed case folder to review case information.

- Display **PPT32, Search Activity**.

Search Activity

Search for

Meredith Gray	Elvis Presley	Betty Boop
• Person & Case	• Worker & Person	• Provider (Betty is a foster parent)

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- Direct the class to search for Meredith, Elvis and Betty.

- Instruct class to access the various types of work that have been completed for each search.

- Direct class to click the various icons and links used in searching for a person, provider and worker.

- Drill down on each icon by clicking the icon to see what pieces of work have been created. Remind learners that the blue hyperlinks are the pieces of work that have been created within the FSFN case.

Refer learners to PG10-13, FSFN Search Tips (PG pages inserted on the following pages TG33-36).

FSFN Search Tips

Case

First Name, Last Name

Search for a Case in First Name, Last Name Format

- Ex: Mary Hodgkins
- Enter Last Name in the "Last Name" field – Hodgkins.
- Enter First Name in the "First Name" field – Mary.
- TIP: To return variations of the first and last name entered, set the precision bar to low. This format is also used for Provider search.

Hyphenated Last Name

Search for a Case with a hyphenated last name:

- Ex: Last Name: Acorn-Squash
- Enter Last Name, hyphen, and Asterisk in the Last Name field: Acorn-*.
- TIP: Add the first initial of the first name with an asterisk in the First Name field to refine the search results. This format is also used with Provider search.

Apostrophe in Last Name

Search for a Case with an Apostrophe in the Last Name:

- Ex: Last Name: O' Gene
- Enter Last Name 1st initial, asterisk, Last Name 2nd initial with asterisk: O*G* in the Last Name field.
- TIP: Add the first initial of the first name with asterisk in the First Name field to refine the search results. This is also used with Provider search.

Intake Number or Historical Investigation Number

Search for a Case with an exact Intake number or historical Investigation Number:

- Ex: Intake Number: 2005-XXXXX
- Enter the intake number in the Intake # Field.
- TIP: To view the complete history for any Case Participant, use person search for the participant(s) displayed within the Case.

Person
First Name, Last Name

Search for a Person in First Name, Last Name Format:

- Ex: Latrice Weaver
- Enter Last Name in the "Last Name" field – Weaver.
- Enter First Name in the "First Name" field – Latrice.
- TIP: To return variations of the first and last name entered, set the precision bar to low. If either the exact Date of Birth or Date of Birth range is known, the returns can be minimized by entering date in the "DOB" or "Date of Birth" range field.

Hyphenated Last Name

Search for a Person with a hyphenated last name:

- Ex: Last Name: Bennett - Crowe
- Enter Last Name, hyphen, and Asterisk in the Last Name field: Bennett-*.
- TIP: Add the first initial of the first name with an asterisk in the First Name field to refine the search results.

Apostrophe in Last Name

Search for a Person with an Apostrophe in the Last Name:

- Ex: Last Name: O' Brien
- Enter Last Name in the "Last Name" field – O'Brien.
- Set the precision tab to high.

OR

- Enter Last Name and Asterisk in the "Last Name" field – O' Brien*.
- Set the precision tab to high.

OR

- Enter Last Name 1st initial, asterisk, Last Name 2nd initial with asterisk: O*B* in the Last Name field.
- TIP: Add the first initial of the first name with asterisk in the first name field to refine the search results.

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Exact Social Security Number

Search for a Person with an exact Social Security Number:

- Ex: Social Security Number: XXX-XX-XXXX
- Enter the Social Security Number in the "ID" field.
- TIP: To view the complete history for any Case participant, use person search for the participant(s) displayed in the Case.

Partial Address

Search for a Person by partial address:

- Ex: North St, North Street; or North Avenue
- In the additional Search Criteria expand, Enter North* in the "Address" field. (If you search North *, persons with all three of these addresses are returned.)
- Select City in the City drop down. (If different variation for city name exists in Legacy system for example: Saint Augustine instead of St. Augustine, type this value in the field next to the City drop down.)
- Ex: 8th CT; 8th ST; or 8th Avenue (this returns all with/without a Prefix or Suffix)
- In the additional Search Criteria expand, enter 8th in the "Address" field. (If you search 8th* then persons with all three of these addresses are returned.)
- Select City in the City drop down. (If different variation for city name exists in Legacy system for example: Ft Lauderdale instead of Fort Lauderdale, type this alternate spelling in the field next to the City drop down.)
- TIP: Add the street number to refine the search results to specific addresses.

Provider

First Name, Last Name

Search for a Provider in First Name/Last Name Format:

- Ex: Provider/Organization Name: Joan Collier
- Enter first name; last name in the Provider/Organization Name field.
- TIP: You can also search using the provider's first name with asterisk in the Provider/Organization Name field – Joan *.

Provider with Multiple Names

Search for a Provider with Multiple Names:

- Ex: Provider/Organization Name: Mary and Chris Brantley
- Enter first name with asterisk * in the Provider/Organization Name field.
- TIP: You can search using Mary and * in the Provider/Organization Name field.

Phone Number

Search for a Provider by Phone Number:

- Ex: Phone # 8503238244
- Enter provider's phone number in the appropriate field.

Provider Type and City

Search for a Provider by Provider Type and City:

- Ex: Provider Type: Service; City: Apalachicola
- Enter Provider Type and City in the appropriate fields.

Provider Type and Zip Code

Search for a Provider by Provider Type and Zip Code:

- Ex: Provider Type: Service; Zip Code: 32311
- Enter Provider Type and Zip Code in the appropriate fields.

Address

Search for a Provider by Address:

- Ex: Provider Address: 2234 Mahan Drive, Tallahassee
- Enter Street Address and City in the appropriate fields.

Worker

First Name, Last Name

Search for a Worker in First Name, Last Name Format:

- Ex: Jessica Bradshaw
- Enter Last Name in the "Last Name" field – Bradshaw.
- Enter First Name in the "First Name" field – Jessica.

Worker Identification Number

Search for a Worker using their Worker Identification Number:

- Ex: 1504095
- Enter Worker Identification Number (the number in parentheses to the right of the worker's name), in the Worker ID field: 1504095.

Let's Review!

- Direct learners to complete the FSFN Orientation Crossword Puzzle located on **PG14-15** ⭐ **(PG pages inserted on the following pages TG38-39)**.

- Below is a completed crossword puzzle to be used as a key for review.
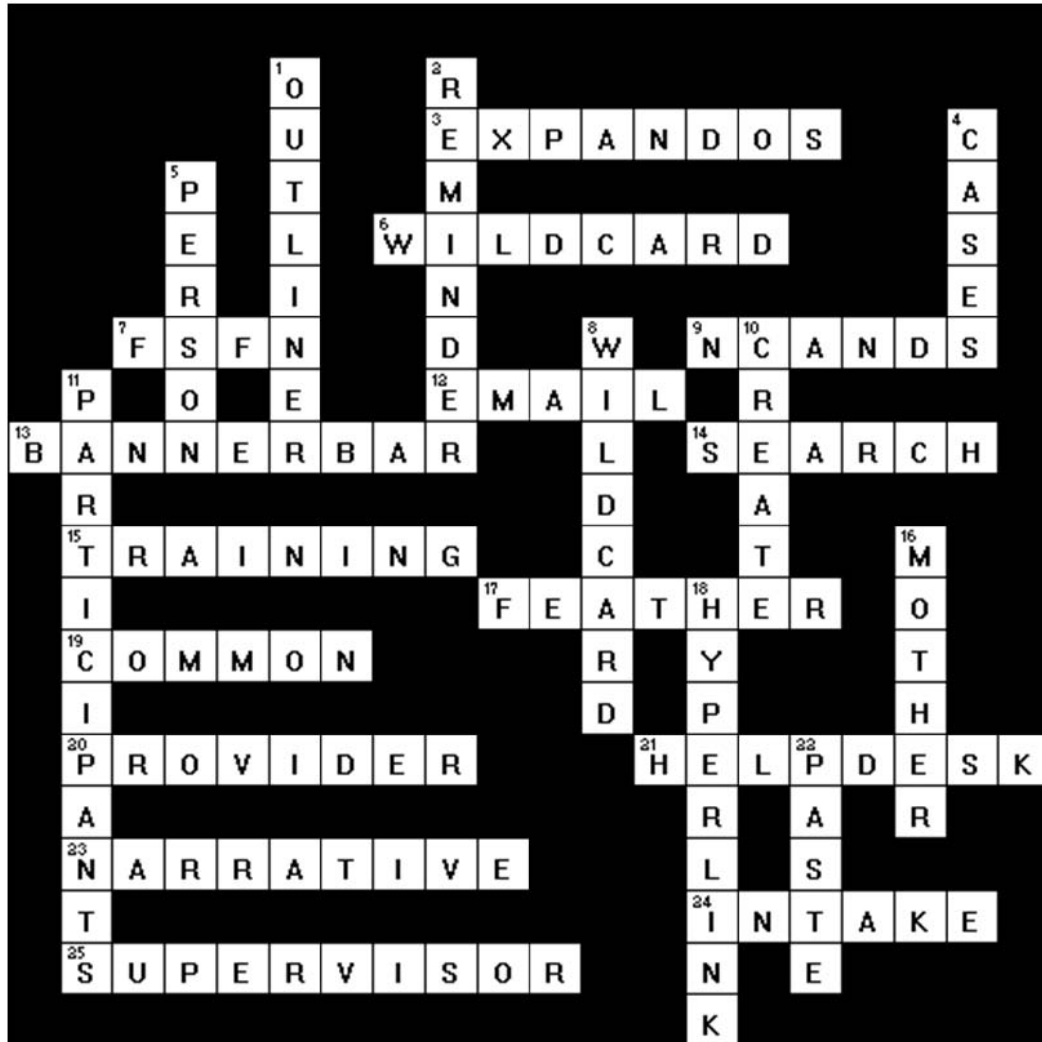
- Review information covered in the computer course and answer any and all questions posed by the learners.

- Remind the class that there are additional computer courses throughout the training to allow additional navigation guidance and practice.

Crossword Puzzle
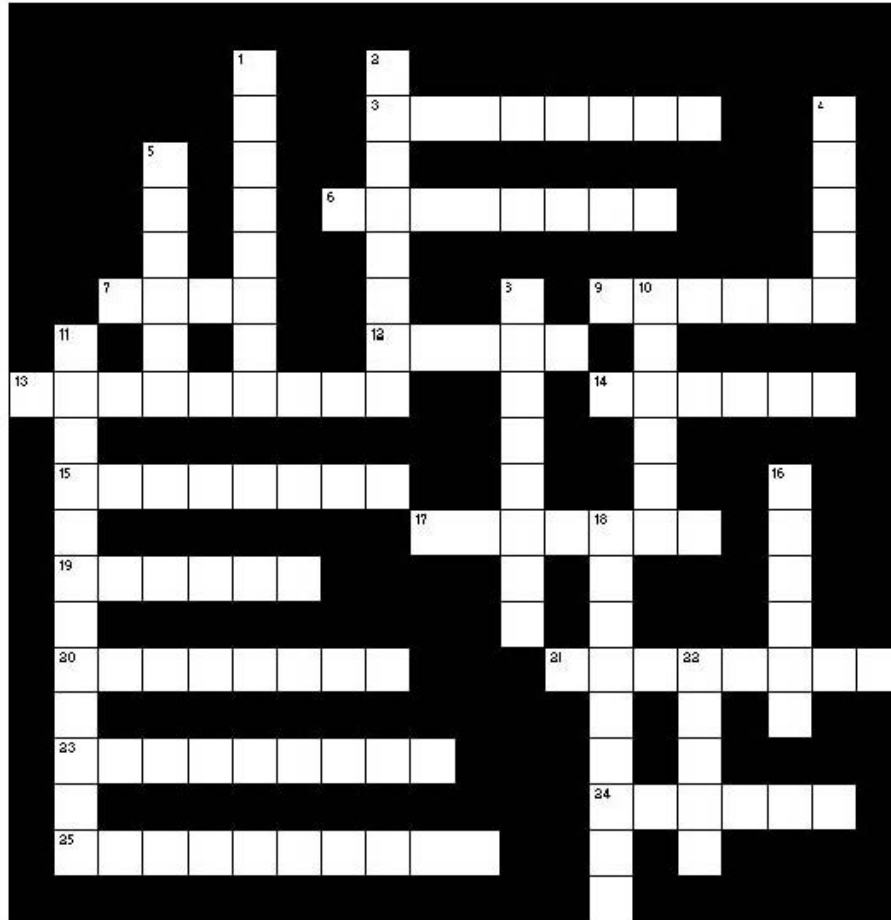
Crossword Puzzle Questions

Across

3 The blue triangles in the outliner sections
6 An asterisk in Search
7 Florida's SACWIS
9 FSFN supports the reporting of data to the AFCARS and ?
12 How automatic messages are received
13 Where spell check is located
14 The most utilized function in FSFN.
15 You can access Web Based Training courses in this section of the FSFN website.
17 Icon that represents a tickler.
19 The online demos on the FSFN website train users on the _____ functions of FSFN.
20 What a foster parent is considered in FSFN
21 Who to contact if you get locked out of FSFN
23 Icon that represents chronological notes
24 The case is created when this is called into the Hotline.
25 Who has access to create unit messages and links?

Down

1 The FSFN Desktop consists of Banner Bar, Menu Bar, _____, and Messages & Links.
2 What ticklers serve as
4 The second expando on the Desktop outliner
5 One of 4 ways you can search in FSFN
8 One of the 2 types of searches
10 The menu bar consists of _____, maintain, utilities, and help.
11 The Related People icon lists case?
16 A case is **usually** named after the?
18 A blue word that turns red when you hover over it
22 CNTRL V = ?

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