## Change History

<table>
<thead>
<tr>
<th>Release# or Date</th>
<th>CR# or Incident #</th>
<th>Change Description</th>
<th>Author(s)</th>
<th>Section Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/07/2013</td>
<td></td>
<td>Initial Version</td>
<td>FSFN Implementation Team</td>
<td>All Sections</td>
</tr>
</tbody>
</table>
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1.1. Introduction

The Search function is designed as a Common Application Function (CAF) to ensure that the same design approach is applied to all types of searches within the system. By applying a consistent approach to the design of all searches, there is a common look and feel to all searches in the system, even though the individual functionality implemented in each specific search is unique.

There are two types of search that will be supported by the Search CAF:

- Data Retrieval Searches; and
- Navigational searches.

**Data Retrieval Searches**

Data retrieval searches are completed with the intent of retrieving existing data to bring back to the active pages from where the search started. These searches start and end on the same business process page, and the data selected during the search process is brought back and displayed on the topic page. (The specific data returned to the calling topic page is determined by that business process and is detailed in the individual topic papers.) A data retrieval search displays a specific search page that allows the user to select the data to be retrieved. When the user needs to select one piece of data for use, the user simply uses the mouse (or alternative navigation method) to select the correct data returned by the search and then selects the Continue button to exit the search page and return the data to the business process page. Once a data retrieval search has begun, no other pages can be invoked until the user selects data and clicks Continue or Closes out of the search.

The purpose of the data retrieval search is to locate and bring information back to the page from which the search was invoked. A user may invoke a data retrieval search from a topic page by clicking the Search hyperlink. Florida Safe Families Network (FSFN) will display the data retrieval search criteria page and the user can then specify the search criteria to be used in the search. FSFN uses the specified search criteria to search the database for data. The search results are displayed on a “search results Outliner” so that the user can select one or more pieces of work. When the search results page is closed, the selected data is passed back to the topic page that initiated the search and displayed in the predefined fields on the topic page.

The following is a list of the types of data retrieval search that will be supported:

- Person
- Case
- Provider/Organization
- Provider Service
- Worker

Each data retrieval search page will do the following:
1. Allow the user to specify the standardized search criteria to be used in the search;
2. Initiate a search for data in the database;
   a. All special characters will be ‘stripped’, search UPPERCASE LST table;
3. Present the search result set to the user;
4. Allow the user to select one or more rows of data from the result set list; and
5. Upon exiting the search results page, the selected data will be passed back and displayed on the topic page in the predefined field(s).

The same page format for selecting data from the search result set and the process used to pass the selected data back to the source page is used on all data retrieval searches. All data retrieval searches are implemented as pages displaying the search criteria and the search results.

All searches of the same type use the same search page regardless of which topic the search is called from. This means that every time the Search Person functionality is called the user will see the same page and search criteria displayed.

**Navigational Searches**

The second type of search, the navigational search, enables a user to look into the FSFN database to locate and view information in the system that the user is authorized to see. The user can view, but cannot update, information via the navigational search. These searches take the user to information regarding a case, provider, person, or worker.

The navigational search is invoked from a menu option (Utilities>Search), or from the Desktop Banner Bar. This information is displayed in the Outliner format so that the user may expand the information to view actual pieces of work. This functionality is the same as the user uses when expanding Outliner icons on the Desktop. The search criteria are standardized for each type of search identified, and the same search page is displayed whenever that type of search is invoked within the system. For example, one search page is used to support all required person searches.

The following is a list of the types of navigational search that will be supported:

- Person
- Provider/Organization
- Case
- Worker

Each Navigational search page will do the following:

1. Allow the user to specify the search criteria to be used in the search;
2. Initiate a search for data in the database;
   a. All special characters will be ‘stripped’, search UPPERCASE LST table;
3. Present the search for data in the database;
4. Allow the worker to navigate the information by expanding the result set in the same manner as the desktop outliner

5. Provide the worker a hyperlink to Person Book or Case book depending on the Search selected.

The search results page contains an Outliner that the user may expand to view the desired pages. The user expands these icons in the same manner as that used on the Desktop Outliner. The Outliner on search pages mimics those of the Desktop Outliner. All continue to be displayed on the user’s Desktop until the user takes some action to close each specific page.

When a Search is performed, a match is found when the text entered by the user matches the text found in the FSFN database. Using the name fields criteria, users can either expand or refine their searches by using the Search Precision tool. The Search Precision Slider has three settings: Low, Medium, and High. The lower the search precision, the more results that are returned based on the spelling of the information entered in the name fields. Setting the search precision to High will bring back only those results that are an exact match of the name spelling entered. For example, if the name 'Smith, Michael' is entered and the search precision is set to 'High,' the system will only return results in which the name is spelled exactly as entered. Setting the search precision anywhere from 'Low' to 'Medium' and the system will return more results with other spelling variations of the name (e.g., ‘Schmit, Michele’, ‘Smith-Green, Michael’). Each time the search precision setting is changed, the user must click Search to retrieve the new results.

If the user conducts a search on any of the tabs on the Utility Search page whereby FSFN Cases are displayed within the results, when the results are returned, if any of the cases are Restricted Cases and the user doesn't have the security to view Restricted Cases, Case Book will be displayed as plain black text instead of a hyperlink.

In addition, if the user changes the search to Participant View and one of the persons within a FSFN Case is associated to any Restricted Cases, and the user doesn't have the security to view Restricted Cases, Person Book will be displayed as plain black text instead of a hyperlink.

Additionally, the user can perform a partial name, or “wildcard search.” The user may enter the first portion of a name (1 character minimum) and then use an asterisk (*) to indicate a wildcard to be used in the search for the end of the name. For instance, a search using “Mart*” entered in the last name field would display members with last names such as “Martens,” “Martin,” and “Martex”. The wildcard character can be used in both name fields (last Name and first Name) in the same search.

1.2. Pages

The criteria and data elements for data retrieval and navigational search pages are identical. Data retrieval searches are presented as individual pages while navigational searches are combined into one four-tab page.
For each type of search, we have displayed both the navigational and data retrieval search pages with one set of page information for each type of search.

1.2.1. Page – Search Person

Data Retrieval Search
1.2.1.1. Page Overview

The Person Search pages allow users to search for people in the database. FSFN displays the results in Outliner form and the user can select people by clicking the Select hyperlink next to the name. The user enters basic criteria contained within the search criteria group box and clicks the Search button to perform the search. The database is searched for data that meets the search criteria entered and the results of the search are returned and displayed in the Persons Returned group box. If the person returned from the search process is a worker, then a “Worker” Icon will be displayed next to the record within the outliner. Only users with appropriate security may expand the “Worker” icon from the Person Search. Displayed next to each person returned, in parenthesis, is the Person ID. In addition, if the person returned is an AKA of another person in the database, directly following the Person ID will be an AKA designation.

As a part of the search, the system will identify if the Persons Returned have SSNs that are duplicates in the system. This will help to both validate the person being returned as well as targeting any duplicated SSNs. Additionally, the system will verify that the SSN is valid based on the following definition of “Invalid SSN” An invalid SSN is: When entered the SSN
will be checked for valid numbers to prevent the introduction of values that could not be correct based on SSA guidelines, as follows:

- SSA has never assigned an SSN with the first three digits of 000, 666, 900 series. If a SSN is entered using 000, 666, or 900-999 as the first 3 digits, the user will get an error message.
- SSA has never assigned an SSN with the second two digits of 00 or the last four digits of 0000.
- In addition to the SSA guidelines, the sequential numbers, 123-45-6789 will not be allowed, and numbers that are all the same, such as all 1’s, 2’s, etc.
- It may be entered as a 9-digit numbers, or with a format mask using numbers and dashes (###-##-####).

Search results sets will be returned by relevance: Last Name, then First Name, then DOB by oldest. The user can also adjust the rank setting of the Search Precision tool to further expand or refine the search results. From the Person Search tab, if the user selects the Print command button the results displayed on the tab will print in their entirety. The Print function will print all expanded areas on the page, regardless of what is displaying in the search page at the point in time. If users wish to see and print less information, the user must open fewer expandos; if the user wishes to see and print more information, the user must open more expandos before invoking the Print command.

When either search is conducted, the following information may be displayed when the person search results are returned: Person ID and AKA designation, Address, Gender, Date of Birth, Ethnicity and SSN with bold "Duplicate SSN:" label if duplicate or normal "SSN:" label if not duplicate. When drilling down on the person icon, the following icons may be displayed: Basic, Related People, Intakes, Investigations, Special Conditions Referrals, and Cases. When drilling down on the Intakes icon, each intake is displayed as a hyperlink, which may display the following information: Intake ID, Intake Name, Intake Type, County, and Status (open or closed). However, for those intakes that have been converted from FAHIS, the status of open or closed is replaced with a designation of ‘w/ Abuse Report.’ Directly beneath each intake hyperlink, the Role(s) associated with the Intake Name are displayed. When drilling down on the Cases icon, any cases within which the person searched is a participant are displayed. Each Case Name is displayed as a hyperlink, which will launch the corresponding Maintain Case page, with the exception of Restricted Cases if the user does not have the appropriate security to view Restricted Cases. In that event, the user will see the Case Name displayed as plain text. Regardless if the user has “View Special Handling Intakes” security or not, if s/he DOES NOT have “View Restricted Cases” then ALL Intakes and Investigations and Special Conditions Referrals will be displayed as plain text when accessed from the 1st Level Intakes, Investigations and Special Conditions Referrals icons. Next to each Case Name is an Actions hyperlink, which will launch the Actions pop-up page, with the exception of Restricted Cases if the user does not have the appropriate security to view Restricted Cases. In that event, the user will not have the Actions hyperlink available...
for that particular case. From the Actions pop-up page, the user can select either of the following options: Create Case Note or Case Note Criteria Search.

**Data Retrieval Search**

A user accesses the data retrieval search page by selecting the Search hyperlink. These choices will be available on appropriate topic pages throughout the system. Initially, the worker enters basic information contained within the search criteria group box for the person search. To perform a person search, the user must enter at least a Last Name, Person ID, ID, or SSN. A search can be performed using only one of these criteria. Available criteria in the Search Criteria group box include Last Name, First Name, Middle Name, Person ID, Age Range Begin, Age Range End, DOB Range Begin, DOB Range End, and DOB. The Additional Search Criteria expando allows a user to search using Gender, ID, Route No., Box No. Street, City, County, and Zip Code. Searches utilizing First Name, DOB, Gender, Street (number), or Zip Code must also include a value in the Last Name field. Person ID and SSN are mutually exclusive to all other fields. When the user enters a value in the Person ID or SSN field, all other fields are disabled.

Selecting Low to Medium precision on the Search Precision bar allows search results to display all persons whose AKA names match the data entered in the Last and First Name fields. For example, if the Last and First Name of ‘Smith, Michael’ is entered, the system not only looks for all people named ‘Smith, Michael’ but also those people with an AKA of ‘Smith, Michael’ recorded in the system. Users can use the Search Precision tool to return other variations of the name in the search results. To view the AKA name, a user would expand the person icon in the search results, expand Basic Information, then expand the AKA Names icon.

FSFN uses all of the data entered to look for a match. For example, if the Last Name of Martin is entered and a Date of Birth of July 17, 1956 is entered, the system looks for all people named Martin born on July 17, 1956. To search for just the Last Name of Martin, the user must blank out the Date of Birth field and re-perform the search.

The Search Person page for a data retrieval search contains a Create button. The Create… button is enabled only after an unsuccessful initial search for a person, i.e., the search returns no matches, or the search returns results but all potential matches are ruled out. The Create button allows the user to create the person directly from the Search Person page. However, the user must always search the database for an existing person record before being able to create a new person record. When the Create… button is enabled and then selected by the user, the user is taken to the CM01: Person Management page. Here, the user enters any necessary information about the new person. FSFN brings the selected data (from the search results Outliner) or the data from the newly created person back to the calling page.

The Search Person page for a data retrieval search also contains a Selected People button. Clicking this button will show the user all the people selected. The user can click the Close button on this page to return to the Search Person page.

**Navigational Search**
The navigational search is accessed through the standard Desktop menu (Utilities>Search), or from the Desktop Banner Bar. The search menu option can be selected and the search tab folder page will be displayed, defaulted to the Case tab. The user can click the Person tab to access the person search functionality. The user “navigates” the information by expanding the Outliner icons that display on the Person Outliner after the search is complete. No data is passed back to a calling page upon exit from a navigational search. The Create button and Selected People button are not available through a navigational search.

The Utility Search page, displays the Person Book hyperlink associated with each Person returned on the Person tab. Selecting the Person Book hyperlink will launch the Person Book page for that specific Person from which all pieces of work will be launched in View mode. In addition, upon drilling down on the Person icon and then on the Case Folder icon, all FSFN Cases displayed will display an associated Case Book hyperlink. Please note that if the person returned is a worker within FSFN there will not be an associated Person Book hyperlink displayed.

Users with a specific security resource can edit the person when accessed from Search Utility page, regardless of whether they have an assignment to an associated case or provider. Only the Basic Tab fields and controls are enabled for this security resource when accessed from the Search Utility page. If they access the person from any other page, this new profile will not be used and the user will have the same access they have today. For example, if they have an assignment to the case, and go to the Maintain Case page, then to the person management page, they will be able to edit all the information for the person. With this access, the user can fix the person’s SSN, or navigate to the Potential Person Matches page to merge the person with another.

1.2.1.2. Page Information

<table>
<thead>
<tr>
<th>Group Box:</th>
<th>Search Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field:</td>
<td>Last Name</td>
</tr>
<tr>
<td></td>
<td>Last name of the search participant; partial searches supported using the (*) wildcard character; wildcard character cannot be the first character; user entered or passed from the calling page; can be used as the sole search criterion; user entered text box. Required if Person ID, SSN, Street (number), Street (name), City, other City, or Zip Code fields are blank.</td>
</tr>
</tbody>
</table>

First Name | First name of the search participant; partial searches supported using the (*) wildcard character; wildcard character cannot be the first character; user entered or passed from the calling page; user entered text box. |

Middle Name | Middle name of the search participant; partial searches supported using the wildcard character; wildcard character cannot be the first character; user entered or passed from the
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person ID</td>
<td>Specifies a unique person ID (FSFN generated person ID); user entered text box or passed from the calling page; can be used as the sole search criterion. When a person ID is entered, all other search criteria fields are disabled.</td>
</tr>
<tr>
<td>SSN</td>
<td>SSN will be verified that it has a valid number structure. It may be entered as a 9-digit numbers, or with a format mask using numbers and dashes (###-##-####). When entered, it will be treated as the sole search criteria, disabling all other fields (except for the Search Button). Ignoring any dashes in the formatting for the field on this page, and any dashes in the target identifier, it will match against both person SSN, and against person other identifiers. The result set will return sorted by person’s Last Name, First Name, DOB, Person ID.</td>
</tr>
<tr>
<td>Age Range Begin</td>
<td>Specifies the starting age of an age range; search results should include ages equal to and greater than the specified Age Begin. Derived from Estimated Age on Person Management module if not null; if Estimated Age is null, derived from calculated age based on DOB on Person Management. User entered text box or passed from the calling page. Mutually exclusive with DOB Range Begin and DOB Range End range; only one range can be used to search.</td>
</tr>
<tr>
<td>Age Range End</td>
<td>Specifies the ending age of an age range; search results should include ages equal to and less than the specified Age Range End. Derived from Estimated Age on Person Management module if not null; if Estimated Age is null, derived from calculated age based on DOB on Person Management. User entered text box or passed from the calling page. Mutually exclusive with DOB Range Begin and DOB Range End; only one range can be used to search.</td>
</tr>
<tr>
<td>DOB Range Begin</td>
<td>Specifies the starting DOB of DOB range; search results should include DOBs equal to and greater than the specified DOB Begin date. Derived from DOB on Person Management. MM/DD/CCYY; user entered text box or passed from the calling page. Mutually exclusive with Age Range Begin and Age Range End range; only one range can be used to search.</td>
</tr>
<tr>
<td>DOB Range End</td>
<td>Specifies the ending DOB of DOB range; search results should include ages equal to and less than the specified DOB End date. Derived from DOB on Person Management. MM/DD/CCYY;</td>
</tr>
<tr>
<td>Field:</td>
<td>Description</td>
</tr>
<tr>
<td>----------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>DOB</strong></td>
<td>Search participant’s date of birth; MM/DD/CCYY; user entered text box</td>
</tr>
<tr>
<td><strong>Field:</strong></td>
<td><strong>Search</strong> Precision</td>
</tr>
<tr>
<td><strong>Group Box:</strong></td>
<td><strong>Additional Search Criteria Expando</strong></td>
</tr>
<tr>
<td><strong>Field:</strong></td>
<td><strong>Gender</strong></td>
</tr>
<tr>
<td><strong>ID</strong></td>
<td>Specifies an ID number of a person recorded by authorized users in the Person Management module; user entered text box or passed from the calling page; can be used as the sole search criterion.</td>
</tr>
<tr>
<td><strong>Street</strong></td>
<td>The street address of the search participant (1\textsuperscript{st} field is used to enter the street number, 2\textsuperscript{nd} field is used to enter the street name); partial searches will be supported using the * wildcard character; wildcard character cannot be the first character; can be used as the sole search criterion; user entered text box.</td>
</tr>
<tr>
<td><strong>Unit Designator</strong></td>
<td>The unit designator and unit of the search participant (1\textsuperscript{st} field is used to select the unit type, 2\textsuperscript{nd} field is used to enter the unit information); user selected and user entered text box.</td>
</tr>
<tr>
<td><strong>Building</strong></td>
<td>The building of the search participant; user entered text box</td>
</tr>
<tr>
<td><strong>PO Box</strong></td>
<td>The PO Box of the search participant; user entered text box</td>
</tr>
<tr>
<td><strong>Route</strong></td>
<td>The Route of the search participant (1\textsuperscript{st} field is used to select the route type; 2\textsuperscript{nd} field is used to enter the route number; 3\textsuperscript{rd} field is used to enter the box number associated with the route number); user selected drop down and user entered text boxes.</td>
</tr>
<tr>
<td><strong>City</strong></td>
<td>The city of the person to be searched (drop down list box: City); user selected from drop down or user entered; city is not required when conducting an address search for a person.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>----------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>State</td>
<td>The state of the person to be searched (drop down list box: State); user selected</td>
</tr>
<tr>
<td>County</td>
<td>The county of the person to be searched (drop down list box: County); user selected from drop down or user entered; can be used as the sole search criterion; required field when a street name is entered</td>
</tr>
<tr>
<td>Non-Florida County</td>
<td>The non-Florida county of the person to be searched; user entered</td>
</tr>
<tr>
<td>Zip Code</td>
<td>The zip code of the person to be searched; can be used as the sole search criterion; user entered numeric field</td>
</tr>
<tr>
<td>Country</td>
<td>The country of the person to be searched (drop down list box: Country); user selected from drop</td>
</tr>
</tbody>
</table>

**Links:**
- **Merge**: Data retrieval search – selects person to return to calling page. The Merge selection allows user to select up to three people into the “Merge (#)” bucket. Conditionally visible when person is NOT a user. Only visible when accessed from the following pages: Maintain Case, Person Management, Person Provider, and Person Merge.

**Buttons:**
- **Continue**: Data retrieval search - returns the user to the calling page, selected data returned to predefined fields on the calling page.
- **Close**: Exit page – in data retrieval searches, no data returned to the calling page.
- **Search**: Initiates a search of the database based on the information entered in the search criteria structure.
- **Create**: On data retrieval search page only; Takes the user to create a person on the Person Management Page.
- **Selected People**: On data retrieval search page only; Takes the user to the Selected People page when clicked.
- **Merge**: Navigates user to the Person Merge Page, carrying forward the person(s) selected in the “Merge (#)” to pre-fill the person(s) on the Person Merge Page. Conditionally enabled when “Merge (#)” bucket is either 2 or 3. Only visible when accessed from Maintain Case and Person Provider.

**Other**
- **Merge(#)**: Shows the number of people selected via the Merge Link. Only
Bucket visible when accessed from the following pages: Maintain Case, Person Provider, and Person Merge

Selected People Shows the number of people selected via the Select hyperlink.

#

1.2.1.3.Background Processing

- The IDs or textual information to be used in a data retrieval search will be passed to search through the application’s master structure. The calling page will fill the data that Search needs into this holder and then Search will read from here to obtain the data for its use.

- One of the following elements is necessary on all searches: last name, person ID, SSN, ID, Street (number), Street (name), City, other city, or Zip Code. If data is entered in the Person ID, SSN, or ID fields, all other criteria and additional criteria fields are disabled. If data is entered in these fields and then deleted, all other fields are enabled.

- Partial searches on names can be supported in the form ABC* where ABC corresponds to the first 3 letters of the name and the * is a wildcard character or AB*C*. A minimum of 1 character and one wildcard character may be used. The wildcard character can be used in all name fields (Last Name, First Name, Middle Name, Street Number, and Street Name) in the same search.

- When a search is initiated by clicking the Search button, the criteria entered are matched against information in the person table to obtain the appropriate results.

- Up to 25 search results will be displayed per page. If more than 25 results exist for a particular search the page will display as "1 to 25 of X (number)", and there will be a ‘Next’ hyperlink to access the next group of search results. Whenever the ‘Next’ hyperlink is invoked, there will be a ‘Previous’ hyperlink to return the user to the previously viewed search results.

- The Print function will print all expanded areas on the page, regardless of what is displaying in the search page at the point in time. If users wish to see and print less information, the user must open fewer expandos; if the user wishes to see and print more information, the user must open more expandos before invoking the Print command.

- Data retrieval “Search Person” is a response page and therefore cannot be minimized.

- All entered criteria are used to determine the appropriate result set. (Queries use the AND operator, not OR.)

- If a search fails, a message box stating, “No matching data found for the criteria specified" will be displayed.

- All information pertaining to the search results will be displayed on the person
The user may expand the outliner and click on items to display more detailed information. In the navigational search, the user may click on the lowest level of the outliner to open the data maintenance page permitted by their User Group’s security profile.

When the user is finished on the Search Person page, the user may close the page by selecting the Continue or Close button. For a data retrieval search, the user will be returned to the topic page from which the search was called if Continue is selected, and the data selected from the person outliner will be displayed on the topic page in predefined fields.

For a navigational search, no data transfers will occur.

The Create button on the Search Person Page is enabled only on data retrieval searches when a search returns no matching data. The button is disabled otherwise. Clicking on the Create button accesses the CM01: Person Management page in Create mode.

Clicking the Selected People button accesses the Selected People page where all selected people are listed.

If the person returned is a worker, a worker icon will be displayed next to the person record within the search outliner. Person is determined to be a worker by reading PERSON.cd_wrkr where PERSON.id_prsn = the Person ID of the record returned from the search process. If PERSON.cd_wrkr = ‘A’, then the person is also a worker and a worker icon should be displayed. Only users with appropriate security may expand the Worker icon from Person Search.

When the zip code of the person to be searched is entered it becomes criteria used in the search.

The street fields have wildcard functionality.

When entered the SSN will be checked for valid numbers to prevent the introduction of values that could not be correct based on SSA guidelines, as follows:

SSA has never assigned an SSN with the first three digits of 000, 666, 900 series. If user enters 000, 666, or 999 as the first 3 digits, the error message of: “SSN may not have 000, 666, or 999 as the first 3 digits displays.”

SSA has never assigned an SSN with the second two digits of 00 or the last four digits of 0000. If user enters 00 or 999 at the middle two digits: the error message of:"SSN may not have 00 as the middle two digits" displays or If user enters 0000 at the last four digits: the error message of:"SSN may not have 0000 as the last four digits displays."
In addition to the SSA guidelines, the sequential numbers, 123-45-6789 will not be allowed, and numbers that are all the same, such as all 1’s, 2’s, etc. If user enters the sequential number ‘123-45-6789’ as the SSN, they will receive the message: “SSN may not be the sequential number 123-45-6789”

If a SSN is entered using 000, 666, or 900-999 as the first 3 digits, the user will get an error message stating: SSN may not have 000, 666, or 900 series as the first 3 digits.

The SSN may be entered as a 9-digit numbers, or with a format mask using numbers and dashes (####-##-####).

When SSN is entered, it will be treated as the sole search criteria, disabling all other fields (except for the Search Button).

A search or cannot be completed when an invalid SSN is entered, nor in the case of a data retrieval search, can a person be created with an invalid SSN.

If a duplicate SSN is detected for a person returned in the search results, the bolded label of “Duplicate SSN” displays on the page regardless of the search criteria entered the search.

Returned Results will be sorted by Last Name, First Name, Date of Birth and Person ID.

For Data retrieval Search only: The Merge selection from the Persons Returned group box allows user to select up to three people into the “Merge (#)” bucket. Conditionally visible when person is NOT a worker. Only visible when accessed from the following pages: Maintain Case, Person Provider, and Person Merge

For Data retrieval Search only: When the Merge button is clicked carry selected people forward and clear the bucket so that when user returns to this page after visiting the Person Merge page, they can select a new group of people to merge. (s).

For Data retrieval Search only: The Merge button is only visible when accessed from the following pages: Maintain Case or Person Provider. Note: when accessed from Person Merge Page Search button – the Merge button is hidden because the users will use Continue button to return their selected person.

For Data retrieval Search only The Merge (#) Bucket is only visible when accessed from the following pages: Maintain Case, Person Provider, and Person Merge

For Data retrieval Search only Hide the Select Link when accessed from Person Merge Page Search button

For Data retrieval Search only Hide the Create Button when accessed from Person Merge Page Search button
1.2.1.4. Save Processing

- None

1.2.1.5. Page CRUD Matrix

<table>
<thead>
<tr>
<th>Table Name</th>
<th>Create</th>
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<th>Update</th>
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</tr>
<tr>
<td>WORKER</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
1.2.2. Page – Selected People

1.2.2.1. Page Overview

This page displays all of the people that have been selected as a result of the data retrieval person search process. On the Search Person page, the user clicks the Select hyperlink next to the name to add them to the Selected People list. These are the people who are sent back to the calling page from the Search Person process. To view this page, the user must select the Selected People button. The page displays the person’s Name, Date of Birth and Gender. This page is not available from a navigational search.

If the worker places multiple people in the Selected People list, and the calling page can only accept one person, the first person placed in the in-box is returned to the page. The order in which the names display is the order in which they were placed in the In-Box.

1.2.2.2. Page Information

Box: None

Fields: Person Name Name of the selected participant; last name, first name, middle name; system derived text box; not user modifiable
DOB  Search participant’s date of birth; MM/DD/CCYY; system derived text box; not user modifiable
Gender  Gender of the search participant; system derived text box; not user modifiable

Buttons:  Close  Returns the user back to the Search Person page

1.2.2.3.Background Processing

- All fields in this page are pre-filled with the information regarding persons selected from the person search results
- Names display in the order in which they were placed into the In-Box.
- When the user is finished on the Selected People page, the user may close the page by selecting Close.
- If the user places multiple people in the Selected People in-box, and the calling page can only accept one person, the first person placed in the in-box is returned to the page.

1.2.2.4.Save Processing

None

1.2.2.5.Page CRUD Matrix

None
1.2.3. Page – Potential Person Matches

1.2.3.1. Page Overview

This page displays all of the people that are potentially an exact match to a new person being entered in the system. The Potential Person Matches page is displayed any time a user is attempting to add a new person to FSFN when creating an intake, adding new case participants, or adding new person provider members. When the user clicks the Continue button on the Intake Participant page or clicks the Save button on the Person Management page, the Potential Person Matches page will be displayed if the user has entered a name that is an exact match for other person(s) in the system. If a DOB or SSN is entered along with the name, the Potential Person Matches page will only display if an exact match based on the Name, DOB, and/or SSN criteria have all been met. A user can select a person from the Potential Person Matches results list then click the Continue button to link the person to an existing piece of work. Alternatively if the new person created is not a match for any person listed on this page, the user can return to the Search page by selecting Close and the new person is added to the corresponding topic page.
To determine if any person listed on the Potential Person Matches page is a match, a user can expand the person icon to view additional person information and related case or provider work.

When an existing person’s information (one who is already saved to the database) is edited to reflect a new name or DOB and those changes result in the system identifying the person to be a duplicate of another person, the system will notify the user that they have just created a potential duplicate. If they save the changes, they will be navigated to the Potential Person Matches Page to resolve the duplicate. They will receive the error message stating: “You have entered name and/or DOB that it is a potential duplicate of another person/other people, if you continue with saving, the Potential Person Matches Page will launch in order for you to resolve the duplicate. Do you want to Save?” If they respond with “Yes”, the data is saved on the person page and the system launches the Potential Person Matches Page. At this point the user will have to use the Merge function to resolve the duplicates. If the user responds with “No”, the user will return to the Person Management page without saving the data.

In addition, this page displays when the information on an existing person is updated such that they would now potentially be an exact match to another person.

1.2.3.2. Page Information

Box: Potential Matches

Displays information on any person(s) already existing in the database who is an exact match for the person being entered. User is allowed to select up to three people into the “Merge (#)” bucket. Conditionally visible when person is NOT a worker and the person is an existing person (not being created).

Fields: SSN

Each person displays includes their SSN if known. When their SSN is a duplicate of another person’s SSN, the SSN will display as bold “Duplicate SSN”, otherwise will display as normal text.

Viewed

The text of “Viewed” will display once user has expanded the item (this action required only when the page is accessed due to a duplicate SSN).

Buttons: Allow Duplicate SSN

This button is visible only when this page is accessed for a newly created person whose SSN is the same as an existing person’s SSN. This button is conditionally enabled once every item has as status of Viewed. When clicked, the user is returned to the Inquiry Search Page with the new person in Participants as “searched not found”, or the Person Management Page with the new person as saved This button appears ONLY when the users access this page due to a duplicate SSN

Merge

This button is visible only when the page is accessed for an existing person. This button will launch the Person Merge Page. It is enabled only when one of the potentially duplicate people is
Navigate to the Person Merge Page, carrying forward the person(s) selected in the “Merge (#)” to pre-fill the person(s) on the Person Merge Page. Conditionally enabled when “Merge (#)” bucket is either 2 or 3. When clicked – carry selected people forward and clear the bucket so that when user returns to this page after visiting the Person Merge page, they can select a new group of people to merge. Conditionally visible when person is NOT a worker and the person is an existing person (not being created).

Continue

This button is visible only when the page is accessed for new person. Returns the user to the Inquiry Search Page, Person Provider Inquiry page or Person Search Page; selected data returned to predefined fields on the Inquiry Search Page or Person Search pages, i.e., when the user selects a person from the Potential matches results list, this button links the person to an existing piece of work.

Close

Returns the user to the Inquiry Search Page, Person Provider Inquiry page or Person Search Page, i.e., if the person created is not a match for any person listed on this page, this button adds the newly created person to the corresponding topic page.

If selected when the page is accessed for a new person with an SSN that is a duplicate, user will receive a warning message “Person will NOT be created. Click “Yes” to continue without creating the person, or “No” to return to Potential Person Matches Page and view all duplicate people, then select Allow Duplicate SSN button in order to create person”. When user responds “Yes”, close Potential Person Matches Page and return user to Inquiry/Person Search Page without creating new person. When user responds “No”, close message and return user to Potential Person Matches Page.

Link

Potential Matches – Person Row - Merge Link

Allows user to select up to three people into the “Merge (#)” bucket. Conditionally visible when person is NOT a worker and the person is an existing person (not being created).

Other

Merge Bucket - Merge (#)

Shows the number of people selected via the Merge Link.

1.2.3.3. Background Processing

• Display only exact match based on Last Name and First Name fields on the Intake
Inquiry search page and the Person Management page.

- Only the first 25 search results will be displayed on this page.
- Whenever there is a match on the SSN, return the record regardless of the search precision spells like feature for the name.
- When creating an intake, if a user clicks the Close button on the page, set the search status as "Search Not Found." If a user selects a radio button beside a potential match and clicks the Continue button, set the search status to "Search Found."
- If close button is selected when the page is accessed with an SSN that is a duplicate, user receives warning message that the new person will NOT be created, or existing person not saved because they have not viewed all the duplicate people and used the Allow Duplicate button to return to the originating page.
- The Allow Duplicate button is conditionally enabled once every item has as status of Viewed. When clicked, the user is returned to the Intake Inquiry Search Page with the new person in Participants as “searched not found”, or the Person Management Page with the new person as saved.
- The Continue button is visible only when the user accesses this page for a new person. Hide the button when this page is accessed for an existing person.
- The Merge button navigates user to the Person Merge Page, carrying forward the person(s) selected in the “Merge (#)” to prefill the person(s) on the Person Merge Page.
- The Merge Button is conditionally enabled when “Merge (#)” bucket is either 2 or 3.
- When the Merge button is clicked – carry selected people forward and clear the bucket so that when user returns to this page after visiting the Person Merge page, they can select a new group of people to merge.
- The Merge Button is Conditionally visible when person is NOT a worker and the person is an existing person (not being created)
- The Merge Bucket displays the number of people selected via the Merge Link When this page is accessed from an existing person record, that person is automatically included as the first person in this bucket.
- The Merge Bucket is conditionally visible when person is NOT a worker and the person is an existing person (not being created)

1.2.3.4.Save Processing

- None

1.2.3.5.Page CRUD Matrix

<table>
<thead>
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<th>Update</th>
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<table>
<thead>
<tr>
<th>Table Name</th>
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</tr>
<tr>
<td>WORKER</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
1.2.4. Page – Case Search

Data Retrieval Search
Navigational Search – Case Tab Case View
Navigational Search – Case Tab Case View
Navigational Search – Case Tab Participant View

1.2.4.1. Page Overview

The Utility Search page, launched from either selecting search from the Utilities menu or clicking the Search command button from the Desktop, displays the Case Book hyperlink associated with each FSFN Case returned on the Case tab. Selecting the Case Book hyperlink will launch the Case Book page for that specific FSFN Case from which all pieces of work will be launched in View mode.

In addition, for all Search tabs captured on the Utility Search page, when drilling down on a Case Folder icon (in Participant View), then on the Person icon, displays the Person Book hyperlink. Clicking on the Person book hyperlink will launch the Person Book page for that specific FSFN Participant with all the pieces of work that will be launched in View mode.

These pages will allow users to search for a case in the database and display the results in outliner form. The user enters the basic criteria contained within the search criteria group box and clicks the Search button to perform the search. The database is searched for data that meets the search criteria entered and the results of the search are displayed on the Case Outliner. Case ID, Last Name, or Intake # is needed as a minimum for any Case search.
If a worker is a participant in a Case, the Case becomes restricted in FSFN. All pieces of work associated with the Case, with the exception of the assignment icons, can only be viewed by individuals with the appropriate security to view restricted cases. Therefore, if a Case is searched out by a user who does not have the appropriate security they can only view the assignment information by drilling down on the Case Folder icon. If ‘View Restricted Case’ check box on the User Group Detail Page is checked for the worker’s user group, the user can also view restricted Case in search mode. Regardless if the user has “View Special Handling Intakes” security or not, if s/he DOES NOT have “View Restricted Cases” then ALL Intakes and Investigations and Special Conditions Referrals will be displayed as plain text when accessed from the 1st Level Intakes, Investigations and Special Conditions Referrals icons.

A user may use the Additional Search Criteria to view the user’s caseload based on selected criteria. Results sets will display all Cases meeting the specified criteria. When a Case search is conducted, the following information may be displayed: Case Name, Case Number (shown in parenthesis), and an Actions hyperlink, all of which are displayed as hyperlinks. Clicking either the Case Name or Case Number will launch the Maintain Case page. Clicking the Actions hyperlink will launch the Actions pop-up page, which allows the user to select one of the following options: Create Case Note or Case Note Criteria Search. The following exception applies: if the user does not have the appropriate security to view restricted cases, the Case Name and Case Number will be displayed as plain text, the Actions hyperlink will not be available for selection, and there will be a designation of ‘Restricted Case.’ The following may be displayed directly beneath each Case Name: Case Type, Case Status, Status Date, Worker Name, Worker Profile and Case Address. When drilling down on the Case Folder icon, the following icons may be displayed:Related People, Intakes, Assignment, Investigations, Special Conditions Referrals, and Narrative. When drilling down on the Intakes icon, each intake that is linked to the Case will be displayed as a hyperlink. Each hyperlink may display the following: Intake ID, Intake Name, Date Received, Intake Type, Investigative Sub Type, Status (open or closed), and County. However, for those intakes that have been converted from FAHIS, the Investigative Sub Type is not displayed, and the status of open or closed is replaced with a designation of ‘w/ Abuse Report.’

The Print function will print all expanded areas on the page, regardless of what is displaying in the search page at the point in time. If users wish to see and print less information, the user must open fewer expandos; if the user wishes to see and print more information, the user must open more expandos before invoking the Print command.

**Data Retrieval Search**

For a data retrieval search, the data retrieved from the search brings data back to the calling page. From any topic page where a case needs to be searched, the user will click the corresponding hyperlink next to the field. Available criteria in the Search Criteria group box include Last Name, First Name, Case ID, Intake #, and County. A search can be performed using only the Case ID, only the Last Name, or only the Intake #. FSFN uses all of the data
entered to look for a match. If the user wishes to find a match on one, or a second, piece of data, two separate searches need to be initiated. When the user enters a value in the Case ID field or Intake #, the Last Name field is disabled and any information previously entered in them are disabled and blanked out. Search results are sorted by relevance to criteria entered.

Users may use the Additional Search Criteria group box, accessed through clicking the Additional Search Criteria expando, to perform searches based on Begin Date and End Date of user assignments, Case Status, Case Type, and Assignment Type. This search will return a results set of Cases meeting the entered criteria, specific to the user initiating the search. The results may be sorted by Assignment Type or Case type. This search provides a user with the ability to view caseloads based on selected criteria. The Case types that can be searched upon are Open, Closed, and All. This gives the User the ability to view both open and closed cases.

If the user enters information into the fields in the Additional Search Criteria group box, any data entered into the Search Criteria fields will be blanked out.

**Navigational Search**

The navigational search is accessed through the standard desktop menu (Utilities>Search), or from the Desktop Banner Bar. The search menu option can be selected and the search tab page will be displayed, defaulted to the Case tab. Initially, the worker will enter the basic criteria contained within the search criteria group box to perform the search. The user can then use the Search Precision tool to set up a more expanded or refined search. Once the user has completed the data entry, the user clicks on the Search button. The database will now be searched for data that meets the search criteria selected and the results of the search will be displayed on the case outliner.

The user “navigates” the information by expanding the Outliner icons that display on the Case Outliner after the search is complete. No data is passed back to a calling page upon exit from a navigational search; however, the user will have the ability to click on any returned case record to open the Maintain Case page (view only mode).

Navigational Case search functionality is affected by the user’s Security User Group. A user’s security will be set up to allow navigational Case searches to return all Case records regardless of location. Also for users with specific security attributes, an assignment can be made by expanding a case and selecting the Action hyperlink next to an existing assignment. For users without the security, the hyperlink does not display.

**1.2.4.2. Page Information**

<table>
<thead>
<tr>
<th>Box:</th>
<th>Search Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fields:</td>
<td>Last Name</td>
</tr>
<tr>
<td></td>
<td>First Name</td>
</tr>
</tbody>
</table>
Case ID: Specifies a unique case record; user entered text box; can be used as the sole search criterion.

Intake: Specifies a unique Intake or Child/Adult Investigation record; worker entered text box; can be used as the sole search criterion.

County: The specific county of the Case; worker selected drop down.

Check box: Date Restricted - If the Date Restricted checkbox is checked, the search results set will only return work created within timeframes specified for each type of work; If unchecked, all associated work will display. Defaults to checked; user modifiable.

Check box: Participant View - Clicking the Participant View check box will display associated casework by case participant; default to blank; enabled.

Search Precision: Scope of search precision; Low to High settings indicate an expanded or refined search based on the information entered in the name fields where High = exact match; Low = partial match.

Group box: Additional Search Criteria

Fields: Begin Date - Assignment begin date for the user to the Case, can be used as sole search criterion with assignment end date; user entered date field. Selected range cannot exceed 180 days.

End Date - Assignment end date for the user to the Case, can be used as sole search criterion with assignment begin date; user entered date field. Selected range cannot exceed 180 days.

Status - Status of the Case; user selected drop down field

Case Type: Type of the Case the user is assigned to; user entered drop down field.

Assignment Type - Assignment Types for the Case the user is assigned to; user entered drop down field.

Sort By - Case Type and Assignment Type mutually exclusive – sorts the data retrieved in either Case Type, or Assignment Type.

Buttons: Continue - Data retrieval search – returns the user to the calling page, selected data returned to predefined fields on the calling page.

Close - Exits the page– in data retrieval searches, no data returned to
the calling page

Search  This button will initiate a search of the database based on the criteria entered in the search criteria structure.

1.2.4.3. Background Processing

- The IDs or textual information to be used in a data retrieval search will be passed to search through the application’s master structure. The calling page will fill the data that Search needs into this holder and then Search will read from here to obtain the data for its use.

- Either Case ID, Intake #, or Last Name are required for a search.

- The ability to enter data in the Case ID or Intake # field is mutually exclusive to all other fields within the search criteria group box.

- Partial searches on names will be supported in the form ABC* where ABC corresponds to the first 3 letters of the name and the * is a wildcard character. A minimum of 1 character and one wildcard character may be used. Wildcard character cannot be the first character.

- When a search is initiated, the criteria entered are matched against information in the case table to return the appropriate results.

- If a partial search fails or is not found, a message box with the appropriate information will be displayed.

- Criteria entered into the Additional Search Criteria will disable and blank out any data entered in the Search Criteria group box.

- The range between Begin Date and End Date cannot exceed 180 days.

- When a user enters Additional Search Criteria, the system will use that user’s User ID to return results specific to that user and that match specified criteria.

- All information pertaining to the search results will be displayed in the form of the case outliner.

- Up to 25 search results will be displayed per page. If more than 25 results exist for a particular search the page will display as "1 to 25 of X (number)”, and there will be a ‘Next’ hyperlink to access the next group of search results. Whenever the ‘Next’ hyperlink is invoked, there will be a ‘Previous’ hyperlink to return the user to the previously viewed search results.

- The Print function will print all expanded areas on the page, regardless of what is displaying in the search page at the point in time. If users wish to see and print less information, the user must open fewer expandos; if the user wishes to see and print more information, the user must open more expandos before invoking the Print command.
• The worker may open the outliner and click on items to display more detailed information. In the navigational search, the user may click on the lowest level of the outliner to open the data maintenance page.

• Data retrieval “Search Case” is a modal page and therefore cannot be minimized.

• When the user is finished on the Search Case page, the user may close the page by selecting Continue. For a data retrieval search, the user will be returned to the topic page from which the search was called, and the data selected from the Case outliner will be displayed on the topic page in predefined fields.

• For a navigational search, no updates or data transfers will occur.

• All entered criteria are used to determine the appropriate result set. (Queries use the AND operator, not OR.)

• Security Note: On the User Group page, a default selection will result in the user being able to search for and view case records, regardless of the case record’s location, from the Case and Person tabs on the Navigational Search page.

• Using WORKER.id_usr_grp, find matching USER_GROUPS_REF record. (WORKER.id_usr_grp = USER_GROUPS_REF.id_usr_grp)

• Sorting Functionality; sorted by relevance for results received through Search Criteria. For results received through Additional Search Criteria, sort options are Assignment Type and Case type; mutually exclusive sort; defaults to Alpha sort.

• If a Case is restricted and the user is not assigned to the Case, he/she will only have access to the assignment icon.

1.2.4.4. Save Processing

None

1.2.4.5. Page CRUD Matrix

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</tbody>
</table>
1.2.5. **Page – Provider Search**

Data Retrieval Search

![Provider Search dialog box](image)
Navigational Search – Provider/Organization Tab

1.2.5.1. Page Overview

These pages will allow users to search for providers in the database, and display the results in outliner form. The user enters the basic criteria contained within the search criteria group box and clicks the Search button to perform the search. The database is searched for data that meets the search criteria entered and the results of the search are displayed on the Provider/Organization Outliner. From the Provider Search tab, if the user selects the Print command button the results displayed on the tab will print in their entirety. The Print function will print all expanded areas on the page, regardless of what is displaying in the search page at the point in time. If users wish to see and print less information, the user must open fewer expandos; if the user wishes to see and print more information, the user must open more expandos before invoking the Print command.

When a Provider search is conducted, the following information may be displayed: The Provider Name, Provider ID (shown in parenthesis), and an Actions hyperlink. The Provider Name and Provider ID are displayed as one hyperlink, which can be used to launch the Provider page. The Actions hyperlink launches the Actions pop-up page which allows the user to select either of the following options: Create Provider Note or Provider Note Criteria Search.

The Utility Search page, launched from either selecting search from the Utilities menu or clicking the Search command button from the Desktop, displays the Case Book hyperlink.
associated with each FSFN displayed within the Prior History, Cases folder icon, when drilling down on each Provider returned on the Provider/Organization tab. Selecting the Case Book hyperlink will launch the Case Book page for that specific FSFN Case from which all pieces of work will be launched in View mode.

The following information may be displayed directly beneath the Provider Name hyperlink: Provider Status (active or inactive), Provider Caregiver 1 & 2 name and role, Provider Type, County and Worker Name. When drilling down on the Provider icon, the following icons may be displayed: Assignments, Basic, Prior History and Placement/Services. When drilling down on the Prior History icon, the following icons may be displayed: Intakes in which the Provider is linked; Investigations in which the Provider is linked; Special Conditions Referral in which the Provider is linked (Note: Special Conditions Intakes prior to Release 2B will not appear under the Intakes icon), and any case(s) in which the Provider is linked. Expanding each of the Case icons beneath the Person icon will display the Intakes and Investigations linked to that particular case.

When a user drills down within the Investigation icon, any pieces of work associated with the Investigation will be displayed as hyperlinks. These pieces of work include: Safety Assessments, Capacity to Consent, Case and Investigation Notes, etc.

When a user conducts a Provider Search, and drills down the Prior History icon, a Cases icon will be displayed at the first level under the Prior History icon. The user will drill down on this Case icon in the same manner as Person Search in order for all the Cases, in which the Provider is linked, to be displayed. Upon drilling down on the Case Folder icon, within the Prior History icon, any Cases that are Restricted will be displayed as plain text. If the user drills down on the individual, Case Folder icon only the Assignment icon will be displayed and all other work items will be hidden.

If the Intake, Investigation and/or Special Conditions Referral is linked to a Restricted Case, and security does not exist for the user, the system will display the Intake, Investigation and/or Special Conditions Referral but the information will be displayed as text only, not a hyperlink, and the words Restricted Case will appear at the last position of the outliner. For a user with the appropriate security to view a Restricted Case, a blue hyperlink will exist. Regardless if the user has “View Special Handling Intakes” security or not, if s/he DOES NOT have “View Restricted Cases” then ALL Intakes and Investigations and Special Conditions Referrals will be displayed as plain text when accessed from the 1st Level Intakes, Investigations and Special Conditions Referrals icons.

When the user drills down on the Prior History icon and then the Intakes icon, the Investigation icon and/or the Special Conditions icon, any Intakes, Investigations and/or Special Conditions Referral in which the Provider is linked will be displayed as hyperlinks. If the user DOES NOT have “View Restricted Cases” security, then ALL Intakes and Investigations and Special Conditions Referrals will be displayed as plain text. If the user drills down on the individual, Case Folder icon only the Assignment icon will be displayed and all other work items will be hidden.
If the user does NOT have “View Special Handling Intakes” security but DOES have “View Restricted Cases security, when performing a Provider Search upon drilling down on the 1st Level Intakes, Investigations and Special Conditions Referral icons within the Prior History icon, if the Intake, Investigation or Special Conditions Referral is “Special Handling” it will be displayed as plain text. In addition, upon drilling down on the Prior History icon > drilling down on the Case Folder icon > drilling down on an individual Case Folder icon > and then drilling down on the Intakes, Investigations or Special Conditions Referrals icons, those which are “Special Handling” will be displayed as plain text.

Each Case Name, including the Case Number in parenthesis, will be displayed as a hyperlink to launch the Maintain Case page. When drilling down on the Case Folder icon and then the Intakes icon, all intakes linked to the case will be displayed as hyperlinks. Each intake hyperlink may display the following information: Intake ID, Intake Name, Date Received, Intake Type, Investigative Sub Type, Status (open or closed) and County. However, for those intakes that have been converted from FAHIS, the Investigative Sub Type is not displayed, and the status of open or closed is replaced with a designation of ‘w/ Abuse Report.’

**Data Retrieval Search**

For a data retrieval search, the data retrieved from the search brings data back to the calling page. From any topic page, the user will select the corresponding hyperlink next to the field to access the Search Provider/Organization page. Initially, the user will enter basic information contained within the search criteria group box for the provider/organization search. A data retrieval search brings data back to the calling page. As a minimum, User must enter one of: Provider Name (1 character), Phone number, Provider ID, SSN, FEIN, Parent Agency ID, Address (minimal), the combination of Fiscal Agency/Service Category/Service Type/Service Match, OR the combination of Provider Type and County.

The Provider/Organization Search functionality is used to search for “person” providers such as day care homes and foster homes, as well as "organizational" providers. A user searching for an organization should enter the name into the Provider/Organization Name field. If the Provider is an individual, the last name of the person should be entered into the Provider Name field, and the person’s first name should be entered into the First Name field. Provider ID, SSN, FEIN, and Parent Agency ID are a mutually exclusive fields. When the user enters a value in either of these fields, all other fields are disabled, except for Fiscal Agency/Service Category/Service Type, Service Match, Date Restricted, and Search Precision. Results are sorted by relevance: Provider/Organization Name, then alphabetically by County.

**Navigational Search**

The navigational search is accessed through the standard Desktop menu (Utilities>Search), or from the Desktop Banner Bar. The search menu option can be selected and the search tab folder page will be displayed, defaulted to the Case tab. The user can click the Provider/Organization tab to access the Provider/Organization search functionality. The user “navigates” the information by expanding the Outliner icons that display on the Provider Outliner after the search is complete. No data is passed back to a calling page upon exit from
a navigational search. Results are sorted by relevance: Provider/Organization Name, then alphabetically by County.

1.2.5.2. Page Information

Box: Search Criteria

Fields:

Provider / Organization Name: Specifies the business or last name of the provider; partial searches supported using the * wildcard character; Wildcard character cannot be the first character; not a required field if any of the other minimum criteria as defined above are entered; can be the sole criterion for a search; user entered text box

Organization Providers will allow additional characters (see background processing) These characters are only be allowed when the Person/Organization drop down is “Organization”.

First Name: First name of the provider; applicable only if it is a home provider; partial searches supported using the * wildcard character; wildcard character cannot be the first character; user entered text box

Person/Organization: Allow user to filter search criteria by Person Providers or Organization Providers or both. Defaults to “Both”.

Fiscal Agency: Users can filter search by providers who have a service associated with that Fiscal Agency. If only Fiscal Agency is entered with Service Match unchecked, the name is required in order to prevent a wide open search of every provider in the system. If only Fiscal Agency is entered with Service Match checked, name is optional and this will return a list of all providers for that Fiscal Agency.

Service Category: Users can filter search by providers who have a service associated with that Service Category. Drop Down enabled when Fiscal Agency is selected and filtered by the value in Fiscal Agency. The combination of Fiscal Agency and Service Category may be used as the sole criteria for a search.

Service Type: Users can filter search by providers who have a service associated with that Service Type. Drop Down enabled when Service Category is selected and is filtered by the value in Service Category. The combination of Fiscal Agency, Service Category and Service Type may be used as the sole criteria for a search.

SSN: User can enter a person or provider’s SSN as search criteria. Can be used as the sole search criteria. When entered, all other
fields are disabled, except for Fiscal Agency/Service Category/Service Type, Service Match, Date Restricted, and Search Precision. Note Allowable format is 999999999, 999-99-9999 and must follow acceptable SSN criteria (see background processing)

FEIN  
User can enter a person or provider’s FEIN as search criteria. When entered, all other fields are disabled, except for Fiscal Agency/Service Category/Service Type, Service Match, Date Restricted, and Search Precision. Allowable format is 999999999 and 99-9999999

Provider ID  
Specifies a unique provider record to be selected; can be the sole criterion for a search; required field if the Provider Name field is not filled in; user entered text box. When entered, all other fields are disabled, except for Fiscal Agency/Service Category/Service Type, Service Match, Date Restricted, and Search Precision.

Parent Agency ID  
Specifies a unique system ID of a provider’s parent organization; if the provider does not have a parent agency, the Provider ID is equal to the Parent Organization; can be the sole criterion for a search; user entered numeric field. When entered, all other fields are disabled, except for Fiscal Agency/Service Category/Service Type, Service Match, Date Restricted, and Search Precision.

Age  
Field allows user to filter search results by age the provider accepts. Default blank.

Gender  
Field allows user to filter search results by gender the provider accepts. Default blank. Drop Down Values: Female, Male, Unknown.

Provider Type:  
Specifies a specific provider type; user selected drop down; when used in combination with County, can be used as sole criteria for search (i.e., name or ID is not required).

Search Providers of Parent Agency  
Specifies to search for parent organizations only; user selected check box; default value is No

Phone #  
The phone number of the person to be searched; can be used as the sole search criterion; user entered numeric field

Street  
The street address of the search participant (1st field is used to enter the street number, 2nd field is used to enter the street name); partial searches will be supported using the * wildcard
character; wildcard character cannot be the first character; can be used as the sole search criterion, in conjunction with city; user entered text box

**Unit Designator**
The unit designator and unit of the search participant (1st field is used to select the unit type, 2nd field is used to enter the unit information); user selected and user entered text box. If the 1st field has a value, the 2nd must have a value.

**Building**
The building of the search participant; user entered text box

**PO Box**
The PO Box of the search participant; user entered text box

**Route**
The Route of the search participant (1st field is used to select the route type; 2nd field is used to enter the route number; 3rd field is used to enter the box number associated with the route number); user selected drop down and user entered text boxes. If the 1st field has a value, the 2nd must have a value. The 3rd is optional.

**City**
The city of the person to be searched (drop down list box: City); user selected from drop down or user entered; can be used as the sole search criterion, in conjunction with street; required field when a street name is entered

**State**
The state of the person to be searched (drop down list box: State); user selected. Required if City is entered.

**County**
The county of the person to be searched (drop down list box: County); user selected from drop down or user entered; can be used as the sole search criterion; required field when a street name is entered

**Non-Florida County**
The non-Florida county of the person to be searched; user entered

**Zip Code**
The zip code of the person to be searched; can be used as the sole search criterion; user entered numeric field

**Country**
The country of the person to be searched (drop down list box: Country); user selected from drop down

**Check box:**

**Date Restricted**
If the Date Restricted check box is checked, the search results set will only return work created within timeframes specified for each type of work; If unchecked, all associated work will display. Defaults to checked; user modifiable.

**Service Match**
Allows user to search only providers who match the Fiscal Agency/Service Category/Service Type, or to return providers
who may not match. Defaults to unchecked, indicating that the Fiscal Agency/Service Category/Service Type do not have to match. If user enters the Fiscal Agency/Service Category/Service Type and leaves Service Match unchecked, when returning non-matching providers, results will display with a note indicating “Fiscal Agency/Service Not Available”. If user checks, results will only return if the provider offers the Service type.

By Availability
Allows user to search by provider’s availability. Defaults to un-checked. Provider is considered “available” if the number of beds available is more than the number of children placed.

Field:
Search
Precision
Scope of search precision; Low to High settings indicate an expanded or refined search based on the information entered in the name fields where High = exact match; Low = partial match. Defaults to “High” so exact string matching is used as the default. Users would change to Low in order to search using “soundex” criteria. Note: a “Low” search will only return Person Providers.

Buttons:
Continue
Data retrieval search – returns the user to the calling page, selected data returned to predefined fields on the calling page.

Navigational search – Exit page

Close
Closes the page– in navigational searches, no data returned to the calling page

Search
This button will initiate a search of the database based on the criteria entered in the search criteria structure.

1.2.5.3. Background Processing

- The ability to enter data in the provider ID field is mutually exclusive to all other fields within the search criteria group box.

- One of the following fields must be entered in every search: Provider ID; SSN; FEIN; Parent Agency ID; Provider/Organization Name; a combination of Provider Type and County; combination of Fiscal Agency/Service Type/Service Match, address information; or zip code.

- Partial searches on names will be supported in the form ABC* where ABC corresponds to the first 3 letters of the name and the * is a wildcard character or AB*C*. A minimum of 1 character and one wildcard character may be used. The wildcard character must follow at least one alphanumeric character. The wildcard character can be used in both name fields (Provider/Organization Name and First Name) in the same search.
• When a search is initiated, the criteria entered are matched against information in the provider/organization table to return the appropriate results.

• If a partial search fails or is not found, a message box with the appropriate information will be displayed.

• All information pertaining to the search results will be displayed in the form of the provider outliner.

• The user may expand the outliner and click on items to display more detailed information. In the navigational search, the user may click on the lowest level of the outliner to open the data maintenance page.

• Data retrieval “Search Provider/Organization” is a modal page and therefore cannot be minimized.

• Up to 25 search results will be displayed per page. If more than 25 results exist for a particular search the page will display as "1 to 25 of X (number)", and there will be a ‘Next’ hyperlink to access the next group of search results. Whenever the ‘Next’ hyperlink is invoked, there will be a ‘Previous’ hyperlink to return the worker to the previously viewed search results.

• The Print function will print all expanded areas on the page, regardless of what is displaying in the search page at the point in time. If users wish to see and print less information, the user must open fewer expandos; if the user wishes to see and print more information, the user must open more expandos before invoking the Print command.

• When the worker is finished on the Provider/Organization Search page, the worker may close the page by selecting Continue or Close. For a data retrieval search, the worker will be returned to the topic page from which the search was called if Continue is selected, and the data selected from the provider outliner will be displayed on the topic page in predefined fields.

• For a navigational search, no updates or data transfers will occur.

• All entered criteria are used to determine the appropriate result set. (Queries use the AND operator, not OR.)

• Duplicate Providers Inactivated through the Provider Link process will be returned via the Navigational Search. The data displayed for these providers will differ from regular active providers. The name of the duplicate provider, along with the ID, is displayed adjacent to the name and ID of the retained provider record.

• Duplicate Providers Inactivated through the Provider Link process will not be returned via the Data Retrieval Search page when accessing it through the Out of Home Placement and the In Home Services pages.

• The Provider/Organization Name can be up to 70 characters.
• For Organization providers search match against the provider’s main name and against any Additional Names entered on the Organization Provider Page – Merge/Name History Tab – Additional Names group box

• The Provider/Organization Name is not required for the search.

• The name field allows additional characters including numbers [0-9], Ampersand [&], Equal [=], Exclamation [!], At [@], Pound [#], Dollar [$], Percent [%], Backslash [/], Forwardslash [/], Comma [,], Period [.], Parenthesis [()], Plus [+], Question mark [?], Colon [:], Semicolon [;], [<> removed because they can corrupt the database], Underscore [_]. Preserve existing characters for Dash (-), and Apostrophe (‘). Note: Asterisk [*] may not be stored in name since it is used as the wildcard character.

• The ability to search using additional characters is restricted to Organization Providers and will only be allowed when the Person/Organization drop down is “Organization”.

• Person Providers or Organization Providers drop down defaults to “Both”. Values Person, Organization, Both. User selection returns results from that specific type of providers.

• Selection of Fiscal Agency filters search by providers who have a service associated with that Fiscal Agency. If only Fiscal Agency is entered with Service Match unchecked, the name is required, in order to prevent a wide open search of every provider in the system. If only Fiscal Agency is entered with Service Match checked, name is optional and this will return a list of providers for that specific Fiscal Agency. If combined with Service Category and Service Type, name is optional.

• When Service Category is selected, search is filtered by providers who have a service associated with that Service Type. The drop down becomes enabled when Service Category is selected and is filtered by the value in Service Category. The combination of Fiscal Agency, Service Category and Service Type may be used as the sole criteria for a search.

• When Service Type is selected, search is filtered by providers who have a service associated with that Service Type. The drop down is enabled when Service Category is selected and is filtered by the value in Service Category. The combination of Fiscal Agency, Service Category and Service Type may be used as the sole criteria for a search.

• SSN is acceptable as the sole search criteria. When entered, all other fields are disabled, except for Fiscal Agency/Service Category/Service Type, Service Match, Date Restricted, and Search Precision. Allowable format is 999999999, 999-99-9999. It may be entered as a 9-digit number, or with a format mask using numbers and dashes (###-##-####). Must follow SSA guidelines listed as follows:
  • SSA has never assigned an SSN with the first three digits of 000, 666, 900 series.
  • SSA has never assigned an SSN with the second two digits of 00 or the last
In addition to the SSA guidelines, the sequential numbers, 123-45-6789 will not be allowed, and numbers that are all the same, such as all 1’s, 2’s, etc.

- .FEIN is acceptable as the sole search. When entered, all other fields are disabled, except for Fiscal Agency/Service Category/Service Type, Service Match, Date Restricted, and Search Precision. Allowable format is 999999999 and 99-9999999.

- When the Provider ID is used as a search criteria, the Search button will remain enabled.

- The Service Match check box defaults to unchecked, indicating that the Fiscal Agency/Service Category/Service Type do not have to match. If user enters the Fiscal Agency/Service Category/Service Type and leaves Service Match unchecked, when returning non-matching providers, results will display with a note indicating “Fiscal Agency/Service Not Available”. If checked, results return only if the provider offers the Service type.

- The “By Availability” check box defaults to unchecked. Provider is returned as “available” if the number of beds available is more than the number of children placed.

- Age filters search results by age the provider accepts. Default blank.

- Gender filters search results by gender the provider accepts. Default blank. Drop Down Values: Female, Male, Unknown.

- Search Precision defaults to “High” so exact string matching is used as the default.

- Search Precision of Low searches using “soundex” criteria. Note: a “Low” search returns only Person Providers.

- Search Criteria to match on a Person Provider’s Caregiver 2 in addition to the person identified as Caregiver 1.

- When searching for Person Provider’s Caregiver 1 and Caregiver 2, system also looks at the person’s AKAs.

- Search Criteria matches on an Organization Provider’s Additional Names (new table being added to Organization Provider Page).

- Searching with Organization Provider’s name, matches against provider name uppercase using the user-entered search criteria name stripped of all special characters and spaces and converted to all uppercase (the only characters remaining should be alphanumeric – letters and numbers).

- Search criteria searches across linked providers and people.

- Search Criteria searches according to the selection in the Person/Organization Drop
Down to filter by only Person Providers or Organization Providers or Both

- When the user enters Fiscal Agency/Service Category/Service Type, the search criteria looks at the Service Matches check box if checked, only providers who have a match on the Fiscal Agency/Service Category/Service Type are returned. If the check box is not checked, search does not check for a match on Fiscal Agency/Service Category/Service Type, but display note in results indicating “Fiscal Agency/Service Not Available”.

- In the search results, under the Services icon, the Fiscal Agency associated with each Service is displayed.

- When the worker checks the By Availability check box, only providers that have capacity for the Fiscal Agency, Service Category, and Service Type are returned. If the user checks the check box but has not entered all three fields (Fiscal Agency, Service Category, Service Type) they will receive an error message.

- If either Age and Gender or both are entered, use as filter criteria against values for Clients by Gender and Age for the Provider and return only providers that match.

- Search results display the Person Provider’s Name as “Last Suffix, First Middle Initial” followed by a second line displaying both Caregiver 1 & 2’s full name, including suffix and middle initial, formatted as “Last Suffix, First Middle Initial.”. Example: Peterson, Paulette P. (Caregiver 1) Peterson II, Patrick R. (Caregiver 2)

- The Provider ID is treated as a “sole” search criterion and disables all other search criteria fields, but does NOT blank them out.

- To search by an address, the following rules apply:
  - Street Fields (Street Number, Street Name, Unit Designator, Unit Number, Building) – If anything is entered for any of these fields, Street Name must have at least one character, and PO Box Fields and Route Fields must be blank. If Unit Designator is selected, Unit Number must have a value.
  - PO Box Fields – one field, if there is a value, all Street Fields and Route Fields must be blank.
  - Route Fields – if Route type is selected, the route number field must have a value
  - City, State, Zip – if City is entered, State is required. State can be used alone, but one of the above Street/PO/Route sets of fields must be entered. If zip code is entered, NO other fields are required, but if other fields are entered, they must follow the rules for valid combinations above.
### 1.2.5.4. Save Processing

None

### 1.2.5.5. Page CRUD Matrix

<table>
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<tr>
<th>Table Name</th>
<th>Create</th>
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<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
1.2.6. **Page – Worker Search**

Data Retrieval Worker Search
Navigational Search – Worker Tab
1.2.6.1. Page Overview

These pages allow users to search for users in the database. FSFN displays the results in Outliner form in order of relevance to search criteria entered. The user enters the basic criteria contained within the search criteria group box and clicks the Search button to perform the search. The database is searched for data that meets the search criteria entered and the results of the search are displayed on the Worker Outliner. The user may click on the hyperlink to display more detailed information if the user has the appropriate security to view details; however they will not be able to open any pages on the lowest level of detail within the outliner. Users without security to expand the icon will only see summary information for users.

Available criteria on this page include Last Name, First Name, Worker ID, Employee ID, User ID, County, Begin Date, and End Date. A search can be performed using only the Worker ID, Employee ID, User ID, or Last Name. FSFN uses all of the data entered to look for matching data. The search results display in order of relevance to the search criteria entered. When a Worker Search is conducted and the user drills down on the Worker icon, all Cases and
Providers that the user is assigned to will be displayed. The user can drill down on the Case Folder and Provider icons in the same manner as done through the Case and Provider Search.

The Utility Search page, launched from either selecting search from the Utilities menu or clicking the Search command button from the Desktop, displays the Case Book hyperlink associated with each FSFN Case displayed upon drilling down on each worker on the Worker tab. Selecting the Case Book hyperlink will launch the Case Book page for that specific FSFN Case from which all pieces of work will be launched in View mode.

The Print function will print all expanded areas on the page, regardless of what is displaying in the search page at the point in time. If users wish to see and print less information, the user must open fewer expandos; if the user wishes to see and print more information, the user must open more expandos before invoking the Print command.

**Data Retrieval Search**

For a data retrieval search, the data retrieved from the search brings data back to the calling page. By selecting the corresponding hyperlink next to a worker field, the Search Worker page will be displayed allowing the user to retrieve a worker name.

**Navigational Search**

The navigational search is accessed through the standard Desktop menu (Utilities>Search), or from the Desktop Banner Bar. The search menu option can be selected and the search tab folder page will be displayed, defaulted to the Case tab. The user can click the Worker tab to access the worker search functionality. The worker “navigates” the information by expanding the Outliner icons that display on the Worker Outliner after the search is complete, in accordance with security access levels. No data is passed back to a calling page upon exit from a navigational search.

### 1.2.6.2. Page Information

**Box:** Search Criteria

**Fields:**

- **Last Name**: The last name of the worker; partial searches supported using the * wildcard character; wildcard cannot be the first character; required if the worker ID, User ID, or Employee ID field is not filled in; can be the sole criterion for a search; user entered text box
- **First Name**: The first name of the worker; partial searches supported using the * wildcard character; wildcard cannot be the first character; user entered text box
- **Worker ID**: Specifies a unique system generated ID for the worker; required if the Last Name, Employee ID, or User ID is not filled in; can be the sole criterion for a search; worker entered text box
- **Employee ID**: Specifies a user-entered ID for the Employee; required if the Last Name, User ID, or Worker ID is not filled in; can be the...
sole criterion for a search; worker entered text box

**User ID**
Specifies the unique login ID for the Employee; required if the Last Name, Employee ID, or Worker ID is not filled in; can be the sole criterion for a search; worker entered text box

**Begin Date**
Begin Date of the worker; worker entered date field. Date range cannot exceed 180 days.

**End Date**
End Date of the worker record; worker entered date field. Date range cannot exceed 180 days.

**County**
The specific county of the worker; worker selected drop down

**Search Precision**
Scope of search precision; Low to High settings indicate an expanded or refined search based on the information entered in the name fields where High = exact match; Low = partial match. Default to High. user modifiable

**Buttons:**
- **Continue**
  Data retrieval search - returns the worker to the calling page, selected data returned to predefined fields on the calling page.
- **Close**
  Exits the page – in data retrieval searches, no data returned to the calling page
- **Search**
  This button will initiate a search of the database based on the criteria entered in the search criteria structure

### 1.2.6.3. Background Processing

- When a search is initiated, the criteria entered are matched against information in the appropriate tables to return the appropriate results.
- All information pertaining to the search results will be displayed in the form of the worker outliner.
- Data retrieval “Search Worker” is a modal page and therefore cannot be minimized.
- When the user is finished on the Search Worker page, the user may close the page by selecting Continue or Close. For a data retrieval search, the user will be returned to the topic page from which the search was called if the Continue button is selected, and the data selected from the worker outliner will be displayed on the topic page in predefined fields.
- For a navigational search, no updates or data transfers will occur.
- The ability to enter data in the Worker ID, Employee ID, or User ID field is mutually exclusive to all other fields within the search criteria group box. When a value is entered in this field, all other fields are disabled and blanked out.
- Worker ID, Employee ID, User ID, or Last Name is required in all searches.
• Begin Date and End Date will return matches for workers whose active employment occurs within or during the range. Date ranges cannot exceed 180 days.

• Partial searches on names will be supported in the form ABC* where ABC corresponds to the first 3 letters of the name and the * is a wildcard character or AB*C*. A minimum of 1 character and one wildcard character may be used. The wildcard character can be used in both name fields (Last Name and First Name) in the same search.

• Up to 25 search results will be displayed per page. If more than 25 results exist for a particular search the page will display as "1 to 25 of X (number)", and there will be a ‘Next’ hyperlink to access the next group of search results. Whenever the ‘Next’ hyperlink is invoked, there will be a ‘Previous’ hyperlink to return the user to the previously viewed search results.

• The Print function will print all expanded areas on the page, regardless of what is displaying in the search page at the point in time. If users wish to see and print less information, the user must open fewer expandos; if the user wishes to see and print more information, the user must open more expandos before invoking the Print command.

• All entered criteria are used to determine the appropriate result set. (Queries use the AND operator, not OR.)

• If a search fails, a message box stating “No matching data found for the criteria specified “ will be displayed

• Sorting Functionality; sorts by relevance to search criteria entered.

1.2.6.4. Save Processing

None

1.2.6.5. Page CRUD Matrix

<table>
<thead>
<tr>
<th>Table Name</th>
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</table>
### 1.3. Inventories

#### 1.3.1. Table Descriptions

<table>
<thead>
<tr>
<th>Table</th>
<th>Table Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROVIDER_ORG</td>
<td>This table maintains information pertaining to PROVIDER ORG, facility or vendor. Data includes name and address information, placement preferences and home condition description. Record in PROVIDER PART table is created in PM02 (Document Provider) and updated in PM04a/b (Licensing).</td>
</tr>
<tr>
<td>PROVIDER_ADDRESS</td>
<td>This table maintains all PROVIDER ADDRESS information pertaining to providers. Address detail consists of home, business and any other address that is identified as required for SSCS processing.</td>
</tr>
<tr>
<td>WORKER</td>
<td>WORKER table maintains information pertaining to an individual (PERSON) employed by DCF/Community-Based Care /Sheriff’s Office or other authorized users, and is in a job class that provides services, and/or a job class that receives work assignments, and/or who has view capabilities within the system. The information is created in CM18.</td>
</tr>
<tr>
<td>PERSON</td>
<td>This table maintains information that identifies an individual known to FSFN, such as name, date of birth, social security number, race, sex, etc. A PERSON can be a WORKER, REPORT PART, REFERRAL PART, CASE PART or PROVIDER PART. The primary search processing would be centered on this data. Processes of CM01 (Manage Person) build and maintain this information.</td>
</tr>
<tr>
<td>CASE_MASTER</td>
<td>A CASE is the focus of every DCF Business. Case is created as a result of intake work and can be one of three types:</td>
</tr>
<tr>
<td>Table</td>
<td>Table Definition</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>individual, family, DCF/Community-Based Care /Sheriff’s Office provider or other provider. CASE_MASTER table contains case relations, address and approval information. Processes of SM04 (Maintain Case) and SM05 (Close Case) create and maintain case records.</td>
<td></td>
</tr>
<tr>
<td>ZIP_CODE</td>
<td>Zip code reference table for Florida.</td>
</tr>
<tr>
<td>PERSON_AKA</td>
<td>This table maintains a Person’s record of associated names (also known as... names); specifically, to satisfy search criteria when attempting to locate a PERSON and they are known to have used aliases. Also, this table will support name changes in reference to instances where a person would legally change their name, i.e. marriage, divorce, etc. Processes of CM01 (Manage Person) build and maintain this information.</td>
</tr>
<tr>
<td>ADDRESS</td>
<td>This table maintains all ADDRESS information pertaining to a PERSON, except Intake Report (Report and Referral). Address detail consists of home, business and any other address that is identified as required processing. Processes of CM01 (Manage Person) build and maintain this information.</td>
</tr>
</tbody>
</table>

1.3.2. **Reference Data**

1.3.2.1. Drop Downs

FSFN Page: Search  
Tab Name: Case  
Field Name: County  
Table Name: CODE_DESC  
Group Id: COUNTY  

FSFN Page: Search  
Tab Name: Case
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Case Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Name</td>
<td>CODE_DESC</td>
</tr>
<tr>
<td>Group Id</td>
<td>CASETYPE</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Assignment Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Name</td>
<td>CODE_DESC</td>
</tr>
<tr>
<td>Group Id</td>
<td>ASGNTYPE</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Gender</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Name</td>
<td>CODE_DESC</td>
</tr>
<tr>
<td>Group Id</td>
<td>PRSNGNDR</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field Name</th>
<th>County</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Name</td>
<td>CODE_DESC</td>
</tr>
<tr>
<td>Group Id</td>
<td>COUNTY</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field Name</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Name</td>
<td>CODE_DESC</td>
</tr>
<tr>
<td>Group Id</td>
<td>TX_TOWN</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Unit Designator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Name</td>
<td>CODE_DESC</td>
</tr>
<tr>
<td>Group Id</td>
<td>UNITDSGN</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Route</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Name</td>
<td>CODE_DESC</td>
</tr>
<tr>
<td>Group Id</td>
<td>ROUTTYPE</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tab Name</td>
<td>Case</td>
</tr>
<tr>
<td>Field Name</td>
<td>Assignment Type</td>
</tr>
<tr>
<td>Table Name</td>
<td>CODE_DESC</td>
</tr>
<tr>
<td>Group Id</td>
<td>ASGNTYPE</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Gender</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Name</td>
<td>CODE_DESC</td>
</tr>
<tr>
<td>Group Id</td>
<td>PRSNGNDR</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field Name</th>
<th>County</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Name</td>
<td>CODE_DESC</td>
</tr>
<tr>
<td>Group Id</td>
<td>COUNTY</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field Name</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Name</td>
<td>CODE_DESC</td>
</tr>
<tr>
<td>Group Id</td>
<td>TX_TOWN</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Unit Designator</th>
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<tr>
<td>Table Name</td>
<td>CODE_DESC</td>
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<tr>
<td>Group Id</td>
<td>UNITDSGN</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Route</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Name</td>
<td>CODE_DESC</td>
</tr>
<tr>
<td>Group Id</td>
<td>ROUTTYPE</td>
</tr>
</tbody>
</table>
Field Name: State
Table Name: CODE_DESC
Group Id: STATECODE

FSFN Page: Search
Tab Name: Person
Field Name: Country
Table Name: CODE_DESC
Group Id: COUNTRY

FSFN Page: Search
Tab Name: Case
Field Name: County
Table Name: CODE_DESC
Group Id: COUNTY

FSFN Page: Search
Tab Name: Provider
Field Name: Provider Type
Table Name: CODE_DESC
Group Id: PINQTYPE

FSFN Page: Search
Tab Name: Provider
Field Name: County
Table Name: CODE_DESC
Group Id: COUNTY

FSFN Page: Search
Tab Name: Provider
Field Name: City
Table Name: CODE_DESC
Group Id: TX_TOWN

FSFN Page: Search
Tab Name: Provider
Field Name: Unit Designator
Table Name: CODE_DESC
Group Id: UNITDSGN
Field Name: Route  
Table Name: CODE_DESC  
Group Id: ROUTETYPE

FSFN Page: Search  
Tab Name: Person  
Field Name: State  
Table Name: CODE_DESC  
Group Id: STATECODE

FSFN Page: Search  
Tab Name: Person  
Field Name: Country  
Table Name: CODE_DESC  
Group Id: COUNTRY

FSFN Page: Search  
Tab Name: Worker  
Field Name: County  
Table Name: CODE_DESC  
Group Id: COUNTY

1.3.2.2. List Boxes  
None

1.3.3. Automated Messages  
None

1.3.4. Checklists  
None

1.3.5. My Tasks  
None

1.3.6. Notifications  
None

1.3.7. Text Templates  
None

1.3.8. Reports  
None
1.3.9. **Triggers**
None

1.3.10. **Batch Programs**
None

1.4. **Requirements Covered in This Paper**
- CMG-012
- RER-007
- RMH-001
- SSE-001
- RMD-002
- RMM-005
- IA-SEARCH-001
- IA-SEARCH-002
- IA-CASE-023
- IA-CASE-024
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