Florida Safe Families Network

Case Book
How Do I … Guide

May 12, 2017

The Florida Safe Families Network (FSFN) How Do I Guide helps you understand the steps to complete your work in the FSFN system. It is a desk reference companion to the User Guide that includes additional details. Visit the DCF FSFN website (http://fsfn.dcf.state.fl.us) for the User Guide and additional resources.

How Do I…

General Information

Case Book provides easy access to information on a specific case and its participant. Case Book presents a summary of case and participants' information while providing you direct access via hyperlinks to many of the FSFN pages for viewing and updating information. You can create new pieces of work from Case Book.

- Case Book displays in **edit** mode for updating data if it is accessed from your **Desktop**. If accessed from **Search**, it is in **view-only** mode.
- Case Book employs the same date restrictions used on the Desktop.
- Standard security is applied to the information on the Case Book as to all data within FSFN. Your security profile works the same. If you do not have security to view Medical/Mental Health information, it is not accessible on Case Book.
- If you modify information or create a page, click the **Refresh** button on the Case Book. FSFN updates the Case Book with the most recent, up-to-date information and resets the default of the center drop down to Case Notes.
- Before creating new pieces of work, review the information on the Case Book, as the piece of work may already exist.
- If you are assigned to a restricted case, you access the Case Book from your FSFN Desktop. However, you cannot access the Case Book of a restricted case from the Search (Utility) page, even if you have an assignment.

Access Case Book

How Do I…?	Selections	Tips & Guidelines
Access Case Book from the Desktop	• From Desktop, expand Outliner: **Cases**. • Click **Case Book** hyperlink for the appropriate case.	*Case assignment is required to access Case Book from the Desktop.* *Case Book accessed from Desktop displays in edit mode, including other pages accessed from Case Book.*
Access Case Book from Search	• From Desktop, click **Search** on the Banner. • Conduct search. *Case tab:* • In **Cases Returned Group box**, click **Case Book** hyperlink for the appropriate case. *Person tab:* • In **Persons Returned Group box**, expand Outliner: **Person > Cases**. • Click **Case Book** hyperlink for appropriate case. *Provider/Organization tab:* • In **Providers Returned Group box**, expand Outliner: **Provider > Prior History > Cases**. • Click **Case Book** hyperlink for appropriate case. *Worker tab:* • In **Workers Returned Group box**, expand Outliner: **Worker**. • Click **Case Book** hyperlink for appropriate case.	*Case Book accessed from Search displays in view only mode, including other pages accessed from Case Book.* *Create Case Work hyperlink, Case, and Participants Actions list boxes do not display when Case Book is accessed from Search.* *If a case is restricted, Case Book is not accessible from Search, even if you are assigned to the case.*

Create Work from Case Book

How Do I…?	Selections	Tips & Guidelines
Access Create Case Work page	• Click **Create Case Work** hyperlink located at top-center of Case Book. • On **Create Case Work** page, in **Case Work Items** group box, select appropriate work type. • In **Case Participants** group box, select the appropriate case participant(s). • Click **Create**.	*Create Case Work hyperlink does not display if Case Book was launched from Search.* *If you create or modify information on any page that displays on the Case Book, you must click the Refresh button on the Case Book to see the modified data. FSFN updates the Case Book with the most recent, up-to-date information and resets the default of the center drop down to Case Notes.*
Create Adult Investigation	• From **Case Actions list box**, click **Adult Investigation** hyperlink. • On **Intake Link** page, select appropriate Adult Intake Report. • Click **Continue**.	*The Adult Investigation hyperlink does not display if Case Book was launched from Search.*
Create Child Investigation	• From **Case Actions list box**, click **Child Investigation** hyperlink. • On **Intake Link** page, select appropriate Child Intake Report. • Click **Continue**.	*Child Investigation hyperlink does not display if Case Book was launched from Search.*
Create Case Note	• From **Case Actions list box**, click **Case Notes** hyperlink.	*Case Notes hyperlink does not display if Case Book was launched from Search.*
Create Case Plan Worksheet	• From **Case Actions list box**, click **Case Plan Worksheet** hyperlink. • The **FFA-Ongoing/ Progress Update ID Selection** pop up will display. Select the radio button next to the applicable FFA-Ongoing or Progress Update record and click **Continue**. • The **Case Plan Worksheet** will display.	*An FFA-Ongoing or Progress Update record must be created before creating a Case Plan Worksheet. If user attempts to create a Case Plan Worksheet prior to creating an FFA-Ongoing or Progress Update record, an error message will display and prohibit user from accessing the Case Plan Worksheet page.* *Case Plan Worksheet hyperlink does not display if Case Book was launched from Search.*

Create Work from Case Book

How Do I…?	Selections	Tips & Guidelines
Create Child Investigation	• From **Case Actions list box**, click **Child Investigation** hyperlink. • On **Intake Link page,** select appropriate Child Intake Report. • Click **Continue**.	*Child Investigation hyperlink does not display if Case Book was launched from Search.*
Create Diligent Search for Parent	• From **Case Actions list box**, click **Diligent Search for Parent** hyperlink.	*Diligent Search for Parent hyperlink does not display if Case Book was launched from Search.*
Create an FFA - Ongoing	• From Case Actions list box, click FFA – Ongoing hyperlink. • The Investigation Selection pop up displays. • Select the radio button next to the applicable Investigation and click Continue. OR • Click Create to create a new FFA-Ongoing page independent of an Investigation.	*FFA - Ongoing hyperlink does not display if Case Book was launched from Search.*
Create a Judicial Review Worksheet	• From Case Actions list box, click Judicial Review Worksheet hyperlink. • The Case Plan Worksheet Selection pop up displays. Select the applicable Case Plan Worksheet and click Continue. • The Case Plan Worksheet displays.	*A Case Plan Worksheet must be created before creating a Judicial Review Worksheet.* *Judicial Review Worksheet hyperlink does not display if Case Book was launched from Search.*
Create a Legal Document	• From Case Actions list box, click Legal Document hyperlink. • The Legal Document History pop up displays. Select a Legal Document Name and click Create. • The Legal Document page displays.	*Legal Document hyperlink does not display if Case Book was launched from Search.*

Create Work from Case Book

How Do I…?	Selections	Tips & Guidelines
. Create a Present Danger Assessment	• From Case Actions list box, click Present Danger Assessment hyperlink. • The Present Danger Assessment page displays.	*Present Danger Assessment hyperlink does not display if Case Book was launched from Search.*
Create a Progress Update	• From Case Actions list box, click Progress Update hyperlink. • The FFA – Ongoing/Progress Update Selection pop up will display. Select the radio button next to the applicable FFA-Ongoing or Progress Update record and click Continue. • The Progress Update page will display.	*Progress Update hyperlink does not display if Case Book was launched from Search.*
Create a Safety Plan	• From Case Actions list box, click Safety Plan hyperlink. • The Safety Plan page displays.	*Safety Plan hyperlink does not display if Case Book was launched from Search.*
Create Special Conditions Referral	• From Case Actions list box, click Special Conditions Referral hyperlink. • On Intake Link page, select appropriate Special Conditions Referral. • Click Continue.	*Special Conditions Referral hyperlink does not display if Case Book was launched from Search.*
Create Child Placement Agreement	• From **Participants Actions list box**, click **Child Placement Agreement** hyperlink. • On **Create Case Work** page, in **Case Participants** group box, select appropriate case participant. • Click **Create**	*Child Placement Agreement does not display if Case Book was launched from Search.*

Create Work from Case Book

How Do I…?	Selections	Tips & Guidelines
Create Education	• From **Participants Actions list box,** click **Education** hyperlink. • On **Create Case Work** page, in **Case Participants** group box, select appropriate case participant. • Click **Create**.	*Education hyperlink does not display if Case Book was launched from Search.*

Create Work from Case Book, Continued

How Do I…?	Selections	Tips & Guidelines
Create Family Support	• From **Participants Actions list box,** click **Family Support** hyperlink. • On **Create Case Work** page, in **Case Participants** group box, select appropriate case participant. • Click **Create**.	*Family Support hyperlink does not display if Case Book was launched from Search.*
Create File Cabinet – Upload Image or File	• From **Participants Actions list box**, click **File Cabinet** hyperlink. • On **Create Case Work** page, in **Case Participants** group box, select appropriate case participant(s). • Click **Create**.	*File Cabinet hyperlink does not display if Case Book was launched from Search.* *Hold down the "Ctrl" key to select multiple case participants.*
Create Independent Living	• From **Participants Actions list box**, click **Independent Living** hyperlink. • On **Create Case Work** page, in **Case Participants** group box, select appropriate case participant. • Click **Create**.	*Independent Living hyperlink does not display if Case Book was launched from Search.*

Create Work from Case Book, Continued

How Do I…?	Selections	Tips & Guidelines
Create a Legal Record	• From Participants Actions list box, click Legal Record hyperlink. • On Create Case Work page, in Case Participants group box, select appropriate case participant. • Click Create.	*Independent Living hyperlink does not display if Case Book was launched from Search.*
Create Living Arrangement	• From **Participants Actions list box**, click **Living Arrangement** hyperlink. • On **Create Case Work** page, in **Case Participants** group box, select appropriate case participant. • Click **Create**.	*Living Arrangement hyperlink does not display if Case Book was launched from Search.*

Create Work from Case Book, Continued

How Do I…?	Selections	Tips & Guidelines
Create Medical/ Mental Health	• From **Participants Actions list box**, click **Medical/Mental Health** hyperlink. • On **Create Case Work** page, in **Case Participants** group box, select appropriate case participant. • Click **Create**.	*Medical/Mental Health hyperlink does not display if Case Book was launched from Search.* *Security is required to create the Medical/Mental Health page.*
Create Out-of-Home Placement	• From **Participants Actions list box**, click **Out-of-Home Placement** hyperlink. • On **Create Case Work** page, in **Case Participants** group box, select appropriate case participant. • Click **Create**.	*Out-of-Home Placement hyperlink does not display if Case Book was launched from Search.*

Create Work from Case Book, Continued

How Do I…?	Selections	Tips & Guidelines
Create Placement Request	• From **Participants Actions list box**, click **Placement Request** hyperlink. • On **Create Case Work** page, in **Case Participants** group box, select appropriate case participant. • Click **Create**.	*Placement Request hyperlink does not display if Case Book was launched from Search.*
Create Services	• From **Participants Actions list box**, click **Services** hyperlink. • On **Create Case Work** page, in **Case Participants** group box, select appropriate case participant. • Click **Create**.	*Services hyperlink does not display if Case Book was launched from Search.*

Print from Case Book

How Do I…?	Selections	Tips & Guidelines
Print from Case Book	• From the Banner, click **Print**.	*The click on Print button can be used to print a case summary.*

Refresh Case Book

How Do I…?	Selections	Tips & Guidelines
Refresh Case Book	• Click **Refresh** at the bottom-right of Case Book.	*It is good practice to occasionally refresh the page so that the most recent, up-to-date information is displayed.*

Access Active Participants		
How Do I…?	**Selections**	**Tips & Guidelines**
Access Maintain Case	In Case Information group box, click Case Name – ID hyperlink. Additional information: Case Type Case Open/Reopen Date Primary Assigned Worker County Case Address	Case Name – ID hyperlink may contain additional information such as, Restricted, Closure Status (Accepted or Denied), Case Split, Case Merge, Pre-Adoption, and Post-Adoption.
Access Person Management	• In **Active Participants** group box, click **Person Name-ID** hyperlink. Additional information: – Date of Birth – Age – Service Role – Date of Last Contact	*Only active case participants display.* *The Estimated Age displays if Date of Birth is not available.* *The Date of Last Contact is the most recent completed "Face-to-Face Contact" date documented.*
Access Current Photo	• In **Active Participants** group box, click **Current Photo** hyperlink.	*Current Photo hyperlink only displays if a photo is uploaded from Person Management.*

Access Adoption Information

How Do I…?	Selections	Tips & Guidelines
Access Adoption Information	• In **Adoption Information** group box, click Person Name-ID hyperlink. OR • In the center Work Type drop down, select **Adoption**. • The center drop down will display **Adoption Information** page hyperlink. • View or edit information on selected page, as needed.	*Clicking the Person Name-ID displays Case Participants, active or inactive, with an Adoption Information page created or updated within the last 24 months.* *Case Participants sorts alphabetically.*
Access Adoption Subsidy Agreement Information	• In **Adoption Information** group box, click **Adoption Subsidy Agreement** hyperlink. OR • In the center Work Type drop down, select Adoption. • The center drop down will display **Adoption Subsidy Agreement** page hyperlink. • View or edit information on selected page, as needed. Additional information: – Person Name and ID – Date Last Updated	*Displays Case Participants, active or inactive, with an Adoption Subsidy Agreement Information page created or updated within the last 24 months.* *Sorts alphabetically.*
Access Adoption Web Ready and Not Web Ready Photos, including Sibling Group Photos	• Above center group box in Work Type drop down, select **Adoption**. • Click applicable **Photo** hyperlink.	

Access Adoption Information

How Do I…?	Selections	Tips & Guidelines
Access Adoption Information	• In **Adoption Information** group box, click Person Name-ID hyperlink. OR • In the center Work Type drop down, select **Adoption**. • The center drop down will display **Adoption Information** page hyperlink. • View or edit information on selected page, as needed.	*Clicking the Person Name-ID displays Case Participants, active or inactive, with an Adoption Information page created or updated within the last 24 months.* *Case Participants sorts alphabetically.*
Access Post Adoption Services page	• Above center group box in Work Type drop down, select **Adoption**. • Click the **Post Adoption Services** hyperlink. • **View** or **edit** information on selected page, as needed.	*When Adoption is selected from the Work Type drop down, the center group box automatically displays all relevant pages associated to the person, regardless of the FSFN Case, created or updated within the last 24 months.*

Assessment and Planning

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<tr><th>How Do I…?</th><th>Selections</th><th>Tips & Guidelines</th></tr>
<tr>
<td>Access Assessments and Planning</td>
<td>

- Above center group box in Work Type drop down, select **Assessment and Planning**.
- Click **Assessment and Planning** hyperlink.
- **View** or **edit** information on selected page, as needed.

Additional information:

- For Present Danger Assessment (PDA) created at the Investigation level, Intake/ Investigation ID will display in plain black text directly beneath the hyperlink.
- The Risk Assessment is created from the Child In-Home Investigation; Risk Assessment – Status (Pending or Completed) will display as a hyperlink, directly beneath the following information: Investigation ID, Unable to Assess and the associated Reason, Completed Date, Score Risk Level, Final Risk Level.
- For most assessment and planning pieces of work, the following will display the following in plain black text beneath the hyperlink:
    - Household Name
    - Create Date
    - Date Last Modified
    - Completion Date
    - Unique, system generated IDs for each piece of work displayed
    - Date and Time Entered

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When Assessment and Planning is selected from the Work Type drop down, the center group box automatically displays all relevant pages associated to the person, regardless of the FSFN Case, created or updated within the last 24 months.

Assessment and Planning displays FFA – Investigation, Safety Plan (Investigation and Case level), PDA (Investigation and Case level), FFA - Ongoing, Case Plan Worksheets, Progress Updates, Judicial Review Worksheets and Risk Assessment.

Underneath the Safety Plan outliner, the worker will be able to see more detailed information which includes the Household Name, Effective Date and Termination Date.

The pages are sorted by the Date Created from newest to oldest. In addition to the hyperlink to the Legal pages, hyperlinks to the associated work also display.

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Access Assignments		
How Do I…?	**Selections**	**Tips & Guidelines**
Access Worker Assignment	• From **Work Type** drop down, select ***Assignments***. • In center group box, click **Assigned Worker Name** hyperlink. Additional information: – Worker Type – Role – Start Date and Time – Location (Unit Name)	*Displays "Open" Case Assignments.* *Sorts by Start Date (newest to oldest).*
Create Worker Assignment	• From **Work Type** drop down, select ***Assignments***. • In center group box, click the **Actions** hyperlink displayed to the right of the Assigned Worker Name hyperlink. • Select **Create Assignment** radio button. • Click **Continue**.	*Security is required for creating assignments.*

Access Case Information		
How Do I…?	**Selections**	**Tips & Guidelines**
Access Maintain Case	• In **Case Information** group box, click **Case Name – ID** hyperlink. Additional information: – Case Type – Case Open/Reopen Date – Primary Assigned Worker – County – Case Address	*Case Name – ID hyperlink may contain additional information such as, Restricted, Closure Status (Accepted or Denied), Case Split, Case Merge, Pre-Adoption, and Post-Adoption.*

Access / Create / Search Case Notes		
How Do I…?	**Selections**	**Tips & Guidelines**
Access Case Notes	• From **Work Type** drop down, select ***Case Notes***. • In center group box, click **Case Notes Category** hyperlink. Additional information: – Case Notes Types – Contact Begin Date and Time – Date and Time Entered – Narrative (first 200 characters)	*Case Notes is the default display when Case Book is launched or refreshed.* *Displays Case Notes pages associated to the Case, if created or updated within the last three months.* *Case Notes associated to an Investigation or Special Conditions Referral displays under Investigations/Special Conditions Referrals.* *Sorts by Contact Begin Date (newest to oldest).* *Case Notes can only be modified or image uploaded by the creator or his or her supervisor.*
Access Case Notes View History	• From **Work Type** drop down, select ***Case Notes***. • In center group box, click **View History** hyperlink.	*View History hyperlink launches a Microsoft Word document with all the versions of the specific Case Notes.*
Search for Case Notes	• Click **Case Notes Search Criteria** hyperlink located at the top-center of Case Book. • Conduct a search for case notes.	*Case Notes Search Criteria page is also accessible from the Actions hyperlink available on the Desktop or Search.*
Create Case Notes	• From **Case Actions list box**, click **Case Notes** hyperlink.	*Case Notes hyperlink does not display if Case Book was launched from Search.*

Access Child Placement Agreement

How Do I…?	Selections	Tips & Guidelines
Access existing Child Placement Agreement Pages	• From **Work Type** drop down, select ***Child Placement Agreement***. • In center group box, click **Child Placement Agreement** page hyperlink. Additional information: – Child Placement Agreement Type – Name – Most Recent Effective Date – Terminate Date	*Displays all existing Child Placement Agreement pages. Each hyperlink will launch the Child Placement Agreement page in edit or view mode based on where the Case Book page was accessed from.* *The Child Placement Agreement pages will display newest to oldest based on the very first Effective date documented on the page; if more than one child has the same Effective Date, displays based on Last Name, First Name, Middle Name alphabetically.*

Access / Create Education

How Do I…?	Selections	Tips & Guidelines
Access Education	• In **Education** group box, click **Person Name-ID** hyperlink. Additional information: – School Name – Current Grade – Date Last Updated	*Displays Case Participants, active or inactive, with an Education page created or updated within the last six months.* *Sorts alphabetically.*
Create Education	• From **Participants Actions list box**, click **Education** hyperlink. • On **Create Case Work** page, in **Case Participants** group box, select appropriate case participant. • Click **Create**.	*The Education hyperlink does not display if Case Book was launched from Search.*

Access Eligibility Information		
How Do I…?	**Selections**	**Tips & Guidelines**
Access Medicaid Eligibility Determination	• From **Work Type** drop down, select ***Eligibility***. • In center group box, click **Medicaid Eligibility Determination** hyperlink. Additional information: – Eligibility From Date – Eligibility Review Date – Child Name	*Displays Case Participants, active or inactive, with a Medicaid Eligibility Determination page created or updated within the last 12 months.* *Sorts by Eligibility From Date (newest to oldest).*
Access TANF Eligibility (Foster Care or Adoption)	• From **Work Type** drop down, select ***Eligibility***. • In center group box, click **TANF-Eligibility** or **Adoption TANF-Eligibility** hyperlink. Additional information: – Eligibility From Date – Eligibility Review Date – Child Name	*Displays Case Participants, active or inactive, with a TANF Eligibility page created or updated within the last 12 months.* *Sorts by Eligibility From Date (newest to oldest).*
Access Title IV-E Eligibility (Foster Care)	• From **Work Type** drop down, select ***Eligibility***. • In center group box, click **Title IV-E Eligibility Determination** hyperlink. Additional information: – Eligibility From Date – Eligibility Review Date – Child Name	*Displays Case Participants, active or inactive, with a Title IV-E Eligibility Determination page created or updated within the last 12 months.* *Sorts by Eligibility From Date (newest to oldest).*
Access Title IV-E Eligibility (Adoption)	• From **Work Type** drop down, select ***Eligibility***. • In center group box, click **Adoption Eligibility Determination** hyperlink. Additional information: – Eligibility Effective From Date – Eligibility Void or Termination Date – Child Name – Eligibility Status	*Displays Case Participants, active or inactive, with an Adoption Eligibility Determination page created or updated within the last 12 months.* *Sorts by Eligibility Effective From Date (newest to oldest).*

Use File Cabinet (Images and Files)		
How Do I…?	**Selections**	**Tips & Guidelines**
Access Images and Files	• From **Work Type** drop down, select ***File Cabinet***. • In center group box, click **Image Category – Type** hyperlink. Additional information: – File Name – Date Document Scanned – Associated Case Participants	*Displays uploaded Imaging pages associated to the Case, if created or updated within the last 12 months.* *Sorts by Date Document Scanned (newest to oldest).* *The Medical Record images or files do not display. They display in the Medical/ Mental Health group box.* *The photos uploaded from Person Management do not display. They are available in the Active Participant group box.* *Adoption photos do not display on Case Book.*
Search for Images and Files	• Click **File Cabinet Search** hyperlink located at top-center of Case Book. • Conduct search for images or files.	*The File Cabinet Search page is also accessible from Actions hyperlink available on Desktop or Search.*
Create File Cabinet – Upload Image or File	• From **Participants Actions list box**, click **File Cabinet** hyperlink. • On **Create Case Work** page, in Case **Participants** group box, select appropriate case participant(s). • Click **Create**.	*The File Cabinet hyperlink does not display if Case Book was launched from Search.* *Hold down the "Ctrl" key to select multiple case participants.*

Access / Create Independent Living

How Do I...?	Selections	Tips & Guidelines
Access Independent Living	• In **Independent Living** group box, click **Person Name-ID** hyperlink.	*Displays Case Participants, active or inactive, with an Independent Living page created or updated within the last 24 months.* *Sorts alphabetically.*
Create Independent Living	• From **Participants Actions list box**, click **Independent Living** hyperlink. • On **Create Case Work** page, in **Case Participants** group box, select appropriate case participant. • Click **Create**.	*The Independent Living hyperlink does not display if Case Book was launched from Search.*

Access Intakes

How Do I...?	Selections	Tips & Guidelines
Access Intakes	• From **Work Type** drop down, select ***Legal***. • In center group box, click **Intake ID** hyperlink. Additional information: – Intake Name – Intake Type and Subtype – Screening Decision – Status – County	*Displays Intakes, open or closed, linked Case and received within the last 12 months.* *Sorts by Date Received (newest to oldest).* *Security is required for accessing "Special Handling" Intakes and any of the Intakes flagged as "Special Handling." Without proper security, the Intake information displays as plain black text instead of a hyperlink.*

Access / Create Investigations / Special Conditions Referrals

How Do I…?	Selections	Tips & Guidelines
Access Investigations or Special Conditions Referrals	• From **Work Type** drop down, select ***Investigations/Special Conditions Referrals***. • In center group box, click **Investigation or Special Conditions Referral** hyperlink. Additional information: – Investigation Type and Subtype – Status and Status Date – Intake ID and Date/Time Received – County – Primary Protective Investigator Name and Unit Number and Name – Move Investigation Indicator (M) – Special Handling Indicator – Most Serious Finding on Investigation: Verified, Not Substantiated, or No Indicator	*Displays all Investigations (Child/Adult) and Special Conditions Referrals associated to Case, if created or updated within the last 24 months. Includes open or closed.* *Sorts by Intake Received Date (newest to oldest).* *Security is required for accessing "Special Handling" Intakes and any of the Intakes flagged as "Special Handling." Without proper security the Intake information displays as plain black text instead of a hyperlink.*
Access information relevant to Investigation or Special Conditions Referral	• From **Work Type** drop down, select ***Investigations/Special Conditions Referrals***. • Under specific Investigation or Special Conditions Referral, relevant work displays (FFA – Ongoing; PDA; Safety Plan; Judicial Review Worksheet and Risk Assessment). Click on the appropriate hyperlink to access the piece of work.	*Displays all relevant work associated to the Investigation (Child/Adult) and Special Conditions Referrals associated to the Case, if created or updated within the last 24 months.* *The information displays similar to Desktop Outliner.* *Underneath the Safety Plan outliner, the worker will be able to see more detailed information which includes the Household Name, Effective Date and Termination Date.*
Create Adult Investigation	• From **Case Actions list box**, click **Adult Investigation** hyperlink. • On **Intake Link** page, select appropriate Adult Intake Report. • Click **Continue**.	*The Adult Investigation hyperlink does not display if Case Book was launched from Search.*

Access / Create Investigations / Special Conditions Referrals

How Do I…?	Selections	Tips & Guidelines
Create Child Investigation	• From **Case Actions list box**, click **Child Investigation** hyperlink. • On **Intake Link** page, select appropriate Child Intake Report. • Click **Continue**.	*The Child Investigation hyperlink does not display if Case Book was launched from Search.*
	•	

Access / Create Investigations / Special Conditions Referrals, Continued

How Do I…?	Selections	Tips & Guidelines
Create Special Conditions Referral	• From **Case Actions list box**, click **Special Conditions Referral** hyperlink. • On **Intake Link** page, select appropriate Special Conditions Referral. • Click **Continue**.	*The Special Conditions Referral hyperlink does not display if Case Book was launched from Search.*

Access Legal		
How Do I…?	**Selections**	**Tips & Guidelines**
Access Legal	• Above center group box in **Work Type** drop down, select **Legal**. • Click appropriate Edit hyperlink. • View or edit information on Legal Action page as needed. • Click **Legal Document Category – Type – Case ID** hyperlink. • Legal page displays. • Click **View** hyperlink to view page. Additional information: – Create Date – Case ID – Legal Record type	*When Legal is selected from the Work Type drop down, the center group box automatically displays all relevant pages associated to the person, regardless of the FSFN Case, created or updated within the last 12 months.* *This includes all "Open" and "Closed" Legal documents, Legal Records, and Diligent Search for Parent Pages, which are sorted by the Date Created from newest to oldest.* *In addition to the hyperlink to the Legal pages, hyperlinks to the associated work display.* *The hyperlinks display similar to how they display on your Desktop, except there is no need to expand or drill down to view the work.*

Access / Create Medical/Mental Health		
How Do I…?	**Selections**	**Tips & Guidelines**
Access Medical/ Mental Health	• In **Medical/Mental Health** group box, click **Person Name-ID** hyperlink. Additional information: – Indicator for Psychotropic Meds – Last Date of Medical Exam – Last Date of Dental Exam	*Security is required to access Medical/Mental Health information.* *Displays all Case Participants, active or inactive, with a Medical/Mental Health page created or updated within the last six months.* *Sorts alphabetically.*
Access Medical Records Images or Files	• In **Medical/Mental Health** group box, click **Medical Record- Image Type** hyperlink. Additional information: – File Name – Date Document Scanned – Associated Case Participants	*Security is required to access Medical/Mental Health information.* *Displays all images or files associated to the Case Participants, active or inactive, if created or updated within the last six months.* *Sorts by Date Document Scanned (newest to oldest).*
Create Medical/ Mental Health	• From **Participants Actions list box**, click **Medical/Mental Health** hyperlink. • On **Create Case Work** page, in **Case Participants** group box, select the appropriate case participant. • Click **Create**.	*The Medical/Mental Health hyperlink does not display if Case Book was launched from Search.* *Security is required to create Medical/Mental Health page.*

Access Meetings

How Do I…?	Selections	Tips & Guidelines
Access Meetings	• From **Work Type** drop down, select ***Meetings***. • In center group box, click **Meeting Type** hyperlink. Additional information: – Date Created – Subject Participant	*Displays Meeting pages associated to the Case, if created or updated within the last 12 months.* *Sorts by Date Created (newest to oldest).*

Access / Create Pending Diligent Searches for a Parent

How Do I…?	Selections	Tips & Guidelines
Access Diligent Search for a Parent	• In Pending **Diligent Searches** group box, click **Diligent Search Purpose** hyperlink. Additional information: – Date Entered	*Displays all "Pending" Diligent Search for a Parent pages associated to the Case, if the outcome and date is not documented.* *Sorts by Date Entered (oldest to newest).*
Create Diligent Search for Parent	• From **Case Actions list box**, click **Diligent Search for Parent** hyperlink.	*The Diligent Search for Parent hyperlink does not display if Case Book was launched from Search.*

Work with Placements / Living Arrangement / Family Support / Private Adoption		
How Do I…?	**Selections**	**Tips & Guidelines**
Access Out-of-Home Placements	• From **Work Type** drop down, select ***Placements***. • In center group box, click **Services Category-Type** hyperlink. Additional information: – Service Category and Type – Begin Date and End Date – Provider Name – Participant Name – County of Worker who created Placement – Approval/ Closed Status – Removal/ Discharge indicator – Ending Reason	*Displays Out-of-Home Placement pages associated to case, including all "open" placements and those ended within the last 24 months.* *Groups and displays "open" first, then "ended."* *Sorts alphabetically, then by Begin Date (newest to oldest).*
Access Living Arrangements	• From **Work Type** drop down, select ***Placements***. • In center group box, click **Living Arrangement** hyperlink. Additional information: – Begin Date – End Date – Living Arrangement Type – Participant Name	*Displays Living Arrangements pages associated to case, including all "open" and those ended within last 24 months.* *Groups and displays "open" first, then "ended."* *Sorts alphabetically, then by Begin Date (newest to oldest).*
Access Family Support	• From **Work Type** drop down, select ***Placements***. • In center group box, click **Family Support** hyperlink. Additional information: – Begin Date – End Date – Referral Type – Participant Name – Ending Reason	*Displays Family Support pages associated to case, including all "open" and those ended within the last 24 months.* *Groups and displays "open" first, then "ended."* *Sorts alphabetically, then by Begin Date (newest to oldest).*

Work with Placements / Living Arrangement / Family Support / Private Adoption, Continued

How Do I…?	Selections	Tips & Guidelines
Access Private Adoption	• From **Work Type** drop down, select ***Placements***. • In center group box, click **Private Adoption** hyperlink. Additional information: – Participant Name – Agency Type – Agency Name – Status – Adoption Outcome – Adoption Finalization Date	*Displays Private Adoptions pages associated to case, including all "open" and those finalized within the last 24 months.* *Groups and displays "open" first, then finalized.* *Sorts by alphabetically, then by Create Date (newest to oldest).*
Create Family Support	• From Participants **Actions list box**, click **Family Support** hyperlink. • On **Create Case Work** page, in **Case Participants** group box, select appropriate case participant. • Click **Create**.	*The Family Support hyperlink does not display if Case Book was launched from Search.*
Create Living Arrangement	• From **Participants Actions list box**, click **Living Arrangement** hyperlink. • On Create **Case Work** page, in **Case Participants** group box, select appropriate case participant. • Click **Create**.	*The Living Arrangement hyperlink does not display if Case Book was launched from Search.*
Create Out-of-Home Placement	• From **Participants Actions list box**, click **Out-of-Home Placement** hyperlink. • On **Create Case Work** page, in **Case Participants** group box, select appropriate case participant. • Click **Create**.	*The Out-of-Home Placement hyperlink does not display if Case Book was launched from Search.*

Work with Placements / Living Arrangement / Family Support / Private Adoption, Continued

How Do I…?	Selections	Tips & Guidelines
Create Placement Request	• From **Participants Actions list box**, click **Placement Request** hyperlink. • On **Create Case Work** page, in **Case Participants** group box, select appropriate case participant. • Click **Create**.	*The Placement Request hyperlink does not display if Case Book was launched from Search.*

Access Scheduled Legal Actions

How Do I…?	Selections	Tips & Guidelines
Access Legal Record	• In **Scheduled Legal Actions** group box, click **Legal Actions** hyperlink. Additional information: – Scheduled Date and Time – Person Name and ID – Date Last Updated	*Displays all Legal Records associated to the Case Participants, active or inactive, if there is a Scheduled Date and no Completed Date.* *Sorts by Scheduled Date (soonest first).*

Work with Services		
How Do I…?	**Selections**	**Tips & Guidelines**
Access Services	• From **Work Type** drop down, select ***Services***. • In center group box, click **Services Category – Type** hyperlink. Additional information: – Begin Date – End Date – Provider – Participant Name – Approval Status	*Displays Services page associated to case, including all "open" and those ended within the last 24 months.* *Groups and displays "open" first, the "ended."* *Sorts alphabetically, then by Begin Date (newest to oldest).*
Create Services	• From **Participants Actions list box**, click **Services** hyperlink. • On **Create Case Work** page, in **Case Participants** group box, select appropriate case participant. • Click **Create**.	*The Services hyperlink does not display if Case Book was launched from Search.*