How do I…Supervisory

How Do I…?	Selections	Tips & Guidelines

Assign Case and Reassign associated Ticklers.	▪ From the Desktop **Cases** expando, identify the case to be assigned, and then select Actions hyperlink next to the identified Case.
	▪ From the Actions pop-up, select *Create Assignment* radio button, and then click **Continue**.
	▪ To create an assignment to a unit worker:
	  ▪ From the Create Worker Assignment page, select the radio button next to the unit worker to which you want to assign the case.
	  ▪ Select the appropriate dropdown for Type, Responsibility, and Role for these required fields.
	▪ To create an assignment to a worker in another unit:
	  ▪ Select the *County* or *State* radio button in the View By group box.
	  ▪ Click the County or State icon to expand the unit list.
	  ▪ Click the unit icon to expand the worker list.
	  ▪ Select the radio button next to the worker that you want to assign the case.
	  ▪ Select the Type, Responsibility, and then Role.
	▪ To create an assignment to a worker using worker search:
	  ▪ Select the Type, Responsibility, and then Role.
	  ▪ Click the Search hyperlink to search for, and then add the worker.
	▪ Click **Assign**.
	▪ From the Tickler Reassignment page, select the applicable ticklers to reassign and then click **Save**.
	  ▪ Selected ticklers are redirected to the new worker's desktop (Tickler Outliner).
	▪ All ticklers retain their original due dates and escalation levels when reassigned.
		FSFN automatically generates an email to the workers to notify them of the new assignment.
		
		To sort unit works by title, select the Position Title radio button.
		
		*If the case has been previously assigned, the Tickler Reassignment page displays for you to confirm. Click **Save.***

Close Assignment to yourself, another supervisor, or worker if you have assignment to case	▪ From the Desktop **Cases** expando, click the selected **Case** icon to expand the casework. ▪ Click the **Assignment** icon to expand the worker assignments. ▪ Click the appropriate worker name hyperlink. ▪ From the Worker Assignment page, select the End Assignment* radio button from the status group box, click **Save** and then **Close**. *The system checks to see if an incomplete approval chain exist for the worker whose assignment is being closed. When an incomplete approval chain exists, a message box is displayed stating, "Pending approvals exist for this worker. Approval process must be completed before assignment can be closed." The assignment closure process terminates allowing the supervisor and worker to complete outstanding approvals. If no incomplete approval chains exist, the assignment closure process completes.	*Assignment cannot be closed if incomplete approvals exist.* *The supervisor is not allowed to manually end the last assignment on a case.*
Reassign Ticklers via assignment process (current assignment closed)	▪ From the Desktop, expand **Worker** expando, expand the icon for the worker, identify the case or provider work to be assigned, and then select Actions hyperlink next to the identified case or provider. ▪ From the Actions pop-up, select *Assignment Maintenance* radio button, and then click **Continue**. ▪ From the Worker Assignment page, select *End Assignment* radio button in the Current Worker Status group box, and then click **Reassign**.	*If the existing assignment is ended, the tickler assignment page does **not** appear and all existing ticklers are automatically routed to the newly assigned worker.* *You cannot close a primary assignment unless you are creating a new primary assignment.*

How Do I…?	Selections	Tips & Guidelines
Approve Case/Provider work	▪ From the Desktop, expand the Approvals expando and expand **My Approvals**. ▪ Choose the icon next to the Case or Provider work to be approved. ▪ Drill down to the applicable pending approval item then click the case or provider hyperlink. ▪ From the applicable page, select Approval from the Options list and click **Go**. ▪ From the Approval History page, select the appropriate Approval Decision radio button and then click **Continue.** *Approval Decision selections:* ▪ **Approve** - to approve the work and forward for Supervisory Approval, if needed. ▪ **Reroute** - to forward work for approval to another worker using the Create Worker Assignment page. ▪ **Recall/Return** - to recall or return work that has been submitted for approval. Work is recalled when any item on the page is changed. The approval process must be re-initiated. ▪ **Not Approve** - to finalize work that is not receiving approval. The work is "frozen" with a status of Not Approved. ▪ From the applicable Placement History page, click **Save** and then **Close**.	*Note: The Pending Approvals display under My Approvals expando, accessed via the Approvals expando on the Desktop.*
View Approval History	▪ From a page requiring approval, select **Approval** from the Options dropdown list, and then click the **Go** button. The Approval History page displays. *Approval History Status descriptions:* ▪ **Initial Status/Initial Action**: Item has been created by original worker but not approved ▪ **Pending Status/Approved Action**: Item is in Pending status in the approval process but has been approved by original worker ▪ **Pending Status/Received Action**: Item is in Pending status in the approval process but has been received by next approver or supervisor Approved **Status/Approved Action**: Item has completed the approval process ▪ **Not Approved Status/Not Approved Action**: Item has completed the approval process	*Approval History page displays a historical view of each person in the approval chain, their status, and the date on which the status was designated. The most recent approval is displayed first.*
Add/View Approval Comments	▪ From the Desktop, expand the Approvals expando then expand **My Approvals**. Click the icon for the case selected. Select the icon for the piece of work pending Approval, and then click the Actions hyperlink. ▪ On the Select Action page, select Comments and click **Continue**. Comments pop-up page displays. ▪ Enter appropriate comment, click **Save**, and then click **Close**.	*Use the Comments Pop-up page to add a comment to a document that is in the approval process. Any user involved in the approval history can document and view comments added to a document.*

How Do I…?	Selections	Tips & Guidelines

Manage Pending Approvals	▪ From the Desktop, *select Utilities* > *Approval Management*. The Approval Management page displays.
	▪ In the Approval Activity group box:
	  ▪ If Manage My Pending Approvals is checked, either select a worker from the Worker dropdown list, or select All workers.
	  ▪ If Reroute Worker Approvals is checked, select the worker from the Worker dropdown list. See Reroute Worker Approvals
	▪ In the Manage My Pending Approvals group box, click the check box next to the work requiring approval.
	▪ In the Approval Decision group box, select an Approval Decision, and click **Save**.
	▪ Continue the preceding two steps until all desired cases have been processed for approval, and then click **Close**.
	▪ To view the case prior to approval, click the hyperlink next to the case in the Work Type column. The page displays.
	  ▪ If you review the page and then click Close the page, you are returned to the Manage My Pending Approvals page for an approval decision.
	  ▪ If you review the page, select Approval from the Options dropdown list, and then click Go, The Approval History page displays. Select the Approval Decision, and then click **Save**.
	▪ Click **Close**.
		The Manage My Pending Approvals page displays work that has been approved by a worker and forwarded to a supervisor. The work can also be viewed prior to approval.
		
		Approvals with a status of Initial will not appear on the Manage My Pending Approvals activity.
		
		Review the work prior to making the approval decision by clicking the links in the Work Type column.

Reroute Worker Approvals	▪ From the Desktop, select *Utilities* > *Approval Management.* ▪ From the Approval Management page, click Reroute Worker Approvals radio button. ▪ In the Worker field, select the name of the worker for whom you will be rerouting approvals. ▪ Select the checkbox(es) adjacent to the work item(s) you will be rerouting. ▪ From the Select Receiving Worker group box, click the Select Worker hyperlink. ▪ From the Reroute Worker Approval pop-up page, select the worker who will be receiving the rerouted approvals. ▪ Click **Continue** and then click **Save**.	*Useful when a worker has left the agency and approvals need to be routed to another worker so that the original worker can be inactivated.*

Case Actions

Supervisory How Do I…Guide

How Do I…?	Selections	Tips & Guidelines
De-Link a Mistakenly Linked Services Referral from a Case	▪ From the Desktop **Cases** expando, select the case name hyperlink. ▪ From the Maintain Case page, select Delink Intake from the Options list and then click **Go**. ▪ Select the applicable referral/intake radio button. ▪ Click Yes to the message, 'Are you sure you want to de-link the current case?' ▪ Click **Save**, and then click **Close**.	
Remove Person Mistakenly Added to Case	▪ From the Desktop Cases expando, click on the case name hyperlink. ▪ From the Maintain Case page, select the Remove hyperlink for the appropriate participant to be removed from the selected case. ▪ Click Yes to the message, 'Are you sure you want to remove this Case participant?' ▪ Click **Save.** The name will remain in the case with a Reactivate link next to the name. ▪ Click **Close**.	*Only a supervisor can remove a participant who has been erroneously added to a case and who is not associated with any open casework.* *A worker or a supervisor can deactivate a participant who will be a participant in the case but just not an active participant. Please see the Case Maintenance How Do I guide for more information on deactivating a participant.*

Tickler Management

Supervisory How Do I…Guide

How Do I…?	Selections	Tips & Guidelines

Reassign Tickler to another worker	▪ From the Desktop, select *Utilities* > *Tickler Management.*
	▪ From the Tickler Management page, select the Tickler Reassignment radio button.
	  ▪ In the Worker field, select the worker whose ticklers must be reassigned.
	  ▪ In the Case/Provider field, select the case or provider with ticklers to be reassigned.
	  ▪ The Tickler Reassignment group box will display all ticklers that can be reassigned for the case.
	  ▪ For each tickler to be reassigned, select the appropriate worker in the corresponding *Reassign Tickler To* field.
	▪ Click **Save**.
	▪ Click Yes to the message, 'The selected ticklers will be reassigned and the associated escalated ticklers will be deleted. Are you sure you want to do this?'
	▪ Click **Close**.
		Supervisors can only reassign ticklers for their own workers.
		
		Ticklers can only be reassigned to another worker who has an open active assignment to the case or provider associated with the selected tickler. .
		
		AFCARS ticklers cannot be reassigned.

Delete a Tickler	▪ From the Desktop, select *Utilities* > *Tickler Management*. ▪ From the Tickler Management page, select the Tickler Deletion radio button. ▪ From the Tickler Deletion group box/Worker field, select the worker whose ticklers must be deleted. The Tickler Deletion group box updates to reflect the ticklers available for deletion. ▪ Click the **Delete** checkbox for each tickler to be deleted. ▪ Click **Save**. ▪ Click Yes to the message, 'The selected ticklers will be reassigned and the associated escalated ticklers will be deleted. Are you sure you want to do this?' ▪ Click **Close**.	*Supervisors can only delete ticklers for their own workers.* *Supervisors cannot delete their own ticklers.* *AFCARS ticklers cannot be deleted.*

View Ticklers for a Worker	▪ From the **Workers** expando on the Desktop, click the **Supervisor** icon to expand the outliner to view all workers. ▪ Click the Worker icon to expand the appropriate worker who is assigned to the case or provider. ▪ Select the Actions hyperlink for the appropriate case or provider. ▪ Select *View Ticklers* radio button, and click **Continue**. ▪ View Tickler page displays.	

Alert Management

Supervisory How Do I…Guide

How Do I…?	Selections	Tips & Guidelines

View/Create an Alert	▪ From the Desktop, click the **Cases** expando, and then click the Actions hyperlink next to the selected case name.
	▪ From the Actions pop-up, select Create Alert radio button, and then click Continue.
	▪ From the Maintain Alert page, enter the Alert Information:
	  ▪ Enter the alert text description in the *Narrative* field.
	  ▪ Select the *Alert Type*.
	  ▪ Enter the Missing Person group box information: To add a person to the Missing Person group box, click **Insert**. The Case Participants and Collaterals pop-up displays. Select appropriate checkbox, and click **Continue**. FSFN adds each selected person to the Missing Person group box table.
	  ▪ To remove a person from the Missing Person group box, click the Delete hyperlink next to the person. The system displays verification pop-up. Click 'Yes' to delete or click 'No' to cancel the action.
	  ▪ If the person you wish to add does not display in the pop-up, you will need to add the person to the Maintain Case Window. See Maintain Case.
	▪ If applicable, enter the Other Person group box information in the same manner as entering the missing Person group box information. The system adds each selected person to the Other Person group box table. To remove a person from the Other Person group box, follow the same steps described for removing person form Missing Person group box.
	▪ Enter the Worker Information:
	  ▪ From the Worker Information group box, click Search hyperlink. The Worker Search pop-up displays.
	  ▪ Search for, and then select the radio button for worker initiating the Alert.
	  ▪ Click **Continue**. Worker Search pop-up closes.
	▪ Click **Save**, and then click **Close**.
		Only supervisors are authorized to create an Alert. Once an Alert is created, it can be renewed to extend or expired by the supervisor.
		
		You can view an Alert from your Desktop if the associated case is assigned to you or by completing a person or case search.

Renew an Alert	▪ Expand the Cases expando, and choose the selected case, which has the Alert icon. Expand the icon, and click on the Alert hyperlink. ▪ This opens the Maintain Alert page. ▪ Enter the Renewed Date. The system defaults the expiration date to be 180 days from the Renew Date. ▪ Click **Save**, and then click **Close**. The system saves and closes the Maintain Alert page.	*Only authorized staff have security access to renew an alert*
End an Alert	▪ Open the Maintain Alert page. See View/Create an Alert to complete these steps. ▪ From the Maintain Alert page, enter the Expiration Date. ▪ Click **Save**, and then click **Close**. The system saves and closes the Maintain Alert page.	

How Do I…?	Selections	Tips & Guidelines
Add or delete a checklist item	▪ From the Desktop select Maintain > *Checklist Template.* The Select Checklist Template page displays. ▪ Select the desired Checklist from the Select Template dropdown. Click Continue. ▪ The chosen Checklist Template will display. ▪ To insert another checklist item not pre-populated, click the Insert button and another row will appear. Enter the additional checklist item. ▪ To delete a checklist item, click the delete hyperlink next to the checklist item to be deleted. ▪ Click **Save.**	
Associate a Due Date with a checklist Item	▪ From the Desktop select Maintain > *Checklist Template.* The Select Checklist Template page displays. ▪ Select the desired Checklist from the Select Template dropdown. Click **Continue**. ▪ The chosen Checklist Template will display. ▪ To indicate or change a due date, check the Due Date Allowed checkbox. ▪ Select the Due Date checkbox next to the checklist item desired. ▪ Enter the number of days until the Checklist Item is due. ▪ Click **Save.**	

How Do I…?	Selections	Tips & Guidelines
Create an On-Call Schedule	▪ Select *Utilities* > *On-Call Schedule* > *Maintain.* The Create On-Call Schedule page appears. ▪ On the Basics tab, select the County, Year, Month and Program. ▪ Click Search. A Validation Error pop appears, stating "An on-call schedule for the criteria specified does not exist. Do you want to create it"? Check Yes. ▪ The Receiving Unit Contact Information will pre-populate based on the prior Search criteria. ▪ In the On-call Supervisors group box, click Search and search for the Primary Supervisor. ▪ Select the radio button next to the appropriate Supervisor listed in the Worker's Returned group box and click Continue. ▪ This will return to the Basic tab of the Create On-Call Schedule page. ▪ Complete the same steps to search for and choose a back-up supervisor, if applicable. ▪ Enter the County Sheriff number and Services Contact number in the On-Call Supervisors group box. ▪ Provide comments, if applicable, in the Schedule Comment narrative box. ▪ Choose the Schedule tab. ▪ Select the Month and Year. ▪ Select the checkbox next to the date(s) and time(s) for which one of on-call staff will be entered. Multiple dates and times can be selected as long as they are for one worker. Each worker needs the schedule done and saved separately. ▪ Click the Search hyperlink next to Primary On-Call, and then Search for the worker to be added to the specified date(s) and time(s) of on-call. ▪ Select the radio button for the chosen worker in the Workers Returned group. ▪ Click Continue, and then **Save**. ▪ The worker selected will now display in the Primary Worker column. ▪ Repeat steps to designate an on-call worker for each subsequent worker's date(s) and time(s)	*If you get the message, 'On-Call Schedule does not exist' it is because there is no Receiving Unit designated for the County and Program.*
Update On-Call Schedule	▪ Select *Utilities* > *On-Call Schedule* > *Maintain.* The Create On-Call Schedule page appears. ▪ On the Basics tab, select the County, Year, Month and Program for the schedule you wish to update. Click Search. ▪ The on-call schedule will appear. Click on the Schedule tab. ▪ Select the checkbox next to the date(s) and time(s) for which any one of the on-call staff will be updated. ▪ Click the Search hyperlink next to Primary On-Call, and then Search for the worker to be updated on the specified date and time of on-call. ▪ Select the radio button for the chosen worker in the Workers Returned group. ▪ Click **Continue**, and then **Save**. ▪ The updated worker selected will now display in the Primary Worker column. ▪ Repeat steps to designate an updated on-call worker for each subsequent worker who needs to be updated.	*There can be any number of dates and times as long as any one worker will take all of those dates and times.*

To copy an On-Call Schedule from one month to another	▪ Select *Utilities* > *On-Call Schedule* > *Maintain.* The Create On-Call Schedule page appears.
	▪ On the Basics tab, select the County, Year, Month and Program for the schedule you wish to copy. Click **Search**.
	▪ Click on the Schedule Tab.
	▪ Select the Month and Year you wish to copy and click **Copy.** The message, 'Copy was successful' displays.
	▪ To verify that the schedule was copied:
	  o Click **Close**, Select *Utilities* > *On-Call Schedule* > *Maintain.* On the Basics tab, select the County, Year, Month and Program for the schedule you wish to copy. Click Search.
	  o Click on the Schedule Tab. You will see the copied schedule. If a few dates need to be edited, follow the procedures in Update On-Call Schedule.
		This process is useful if most of the worker's are responsible for the same dates (not days of the week).

Correct a Placement History

Supervisory How Do I…Guide

How Do I…?	Selections	Tips & Guidelines

View/Edit/Correct a Placement History	▪ From the Desktop, select *Utilities* > *Placement Correction.*
	▪ From the Placement Correction History page, select the Search hyperlink to access the Person Search page to search for a child.
	▪ From the Persons Returned group box, select the appropriate **Cases** expando in the Persons Returned group box.
	▪ Select the radio button next to the case to be viewed or edited, and then click **Continue**.
	  ▪ Placement Correction History page displays populated with the Child's person information. View Current Placements hyperlink in the Child Information group box. For users with view-only security setting, the Create button is disabled and the Placement Correction group box remains empty.
	  ▪ For users with appropriate security settings, the Create button is enabled. The Create button launches a Placement Correction Detail page, which is used to document required Placement Information and required Placement Correction Detail Placement fields.
	  ▪ For users with appropriate security settings, Correction History group box displays a View or Edit hyperlink next to previous placements, if applicable. Selecting the Edit button opens a pending placement correction record on the Placement History page.
		User's security profile setting determines whether a worker can "view only" or view and modify placement history.

How Do I…?	Selections	Tips & Guidelines

Complete a Supervisory review of a safety assessment	▪ To open the Safety Assessment:
	  ▪ From the **Cases** expando, expand the Case containing the Investigation.
	  ▪ Click the **Investigation** Icon, and then click the <u>safety assessment</u> hyperlink for the safety assessment you want to review.
	▪ From the Initial Safety Assessment page, choose the Supervisory Review tab.
	▪ Enter your Safety Assessment concurrence:
	  ▪ For each question dropdown, select the supervisory concurrence, Agree or Disagree.
	▪ Enter the Further Actions Needed:
	  ▪ Enter a narrative description in the Further Actions Needed text box.
	  ▪ Select the Supervisor's Comment expando, and enter the summary description for each safety assessment area to which you chose Disagree.
	  ▪ To view the Second Party Review group box, expand the Second Party Review expando.
	    o If the Second Party Review is needed, click the Search hyperlink. Enter the name of the Reviewer. Click **Search**. Select the checkbox of the worker. Click **Continue**. The name will be pre-filled in the Second Party Review group box.
	  ▪ Expand the On Site Investigation Justification expando to If enter applicable response for On Site Investigation Justification.
	▪ Click **Save**. Click **Close** on the message, 'The Supervisory Review has not been completed.'
	▪ In the Options dropdown, choose Supervisory Review Completed, then **Go**.
	▪ A Validation Error pop up will display if there are incomplete areas of the supervisory review.
	▪ Click **Save** and then click **Close**.
		Supervisor receives an email that the safety assessment has been submitted to them for review.
		
		The second party review criteria is auto selected by the system. If the check boxes are selected, then the assessment meets the criteria for a second party review – it must be submitted for SPR. If the assessment does not meet the criteria for SPR, the supervisor may choose to submit it anyway.

Complete a Second Party Review of a safety assessment	▪ To open the Safety Assessment:
	  ▪ From the **Cases** expando, expand the Case containing the Investigation.
	  ▪ Click the **Investigation** Icon, and then click the <u>safety assessment</u> hyperlink for the safety assessment you want to review.
	▪ From the Initial Safety Assessment page, choose the Second Party Review tab.
	▪ Enter your Safety Assessment concurrence:
	  ▪ For each question dropdown, select the Second Party concurrence, Agree or Disagree.
	▪ Enter the Further Actions Needed:
	  ▪ Enter a narrative description in the Further Actions Needed text box.
	  ▪ Select the Second Party Reviewer Comment expando, and enter the summary description for each safety assessment area to which you chose Disagree.
	  ▪ Enter the Further Actions Needed:
	Click **Save** and then click **Close**.
	▪ In the Options dropdown, choose Second Party Review Completed, then **Go**.
		Second party reviewer receives an e-mail that the safety assessment has been submitted to them for review.