

Florida Safe Families Network *How Do I... Guide*

How do I...Delink Intake

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How Do I...?	Selections	Tips & Guidelines
Delink an Intake from a Case	<ul style="list-style-type: none"> ▪ From the Desktop, select the Maintain Case hyperlink for the Case that needs the Intake delinked from it. ▪ From the Maintain Case page, select Delink Intake from the Options dropdown and Click Go. ▪ Click the radio button for the intake that needs to be delinked. ▪ Click Save. ▪ Delink Intake popup displays "Are you sure you want to delink the selected Intake from the current Case?" ▪ Click Yes. ▪ The intake has been delinked from the Case and no longer displays in the Delink Intake window. ▪ Click Close to close the Delink Intake window. ▪ Click Close to close the Maintain Case page and the user is returned to the Desktop. ▪ The System automatically assigns the Intake to the user completing the delink process. 	<p><i>An Intake can only be linked to an existing Case where one or more of the Intake participants are already Case participants. In the instance where a new Case was created because the Intake participants were unknown at the time the intake was received, use the Person Merge utility prior to delinking the Intake to merge the unknown person IDs with the known person IDs. This will insure that the correct Case will be presented for relinking.</i></p> <p><i>The delink intake process can be utilized up to and including the point at which the commencement note is created. Any work on the investigation beyond the commencement note will prevent the ability of the intake from being delinked.</i></p> <p><i>If the user attempts to delink the last remaining Service Referral on a Case the system will not allow the delink.</i></p>

How Do I...?	Selections	Tips & Guidelines
Link the intake to the new Case	<ul style="list-style-type: none"> ▪ From the Desktop, select the Intakes expando. ▪ Click the hyperlink for the Intake that has been delinked. ▪ Click on the Decision tab for the Intake record. ▪ Click the Create/Link Case hyperlink. ▪ The Search Case page displays with any existing Cases where one or more of the Intake participants are listed as Case participants. If no existing Cases are found the display page will be blank. ▪ Select the radio button and then Click Link to link the Intake to a Case or click Create to create a new Case. ▪ The Maintain Case page displays. ▪ Select the appropriate Family Structure from the Family Structure dropdown. ▪ Click Save to save the Case information and complete the linking of the Intake. ▪ Click Close to close the Maintain Case page and return the user to the Desktop. ▪ Refreshing the Cases expando will display the case on the Desktop. 	

Delete a Case Created in Error

Delink Intake How Do I...Guide

How Do I...?	Selections	Tips & Guidelines
Delete the original linked-to Case	<ul style="list-style-type: none">▪ From the Desktop, select the Cases expando.▪ Click the hyperlink for the Case that has been created in error and the Maintain Case page displays.▪ Click the Remove hyperlink next to each participant to remove all the Case participants.▪ Click Save and then Close to be returned to the Desktop.▪ A nightly batch process will automatically delete any Cases found to contain no Case participants.	<p><i>If the Case participant is linked to any pieces of work on the associated Case then the participant removal will be denied.</i></p> <p><i>The last Intake must be delinked prior to the last remaining Case participant being removed.</i></p>