


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










## How do I...FSFN Basics

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How Do I...?	Selections	Tips & Guidelines
Save entered information and exit a page	<ul style="list-style-type: none"> <li>Click <b>Save</b>, and then click <b>Close</b>.</li> </ul>	<i>You must click <b>Save</b> to save your work in FSFN. Your save has been successful when you are returned to the page with no validation messages. <b>Save</b> will also be disabled (grayed out) when the save is complete.</i>
Exit a page without saving information	<ul style="list-style-type: none"> <li>Click <b>Close</b>.</li> </ul>	<i>To cancel saving the information you entered on the page, answer <b>No</b> to 'Do you wish to save your changes?' message.</i>
Make selection and continue to next page	<ul style="list-style-type: none"> <li>Make appropriate selection, and then click <b>Continue</b>.</li> </ul>	<i>The <b>Continue</b> button is used when the information on one page pre-fills information on the next page.</i>

How Do I...?	Selections	Tips & Guidelines
Change Outliner to Participant View	<ul style="list-style-type: none"> <li>Select the <b>Participant View</b> checkbox.</li> </ul>	<i>This allows you to view all the information in the outliner by participant.</i>
Change Outliner to Unrestricted View	<ul style="list-style-type: none"> <li>Deselect the <b>Date Restricted</b> checkbox.</li> </ul>	<i>Deselecting the Date Restricted View, allows you to see the complete history of all work related to a case or provider.</i>
Expand Desktop View	<ul style="list-style-type: none"> <li>Click the blue expand arrow. </li> </ul>	<i>This arrow hides the Messages and Hyperlinks section of the Desktop. If you want to restore the Messages and Hyperlinks section, click the left pointing expand arrow in the top, right corner of the screen.</i>
Create a New Piece Of Work In FSFN	<ul style="list-style-type: none"> <li>From the Desktop menu, select <i>Create &gt; [work type]</i>.</li> <li>On the Create Work page, select the appropriate type of work to be created.</li> </ul>	<i>The Create menu allows you to create new pieces of work including Intakes, Case Work, and Provider Work, Provider Inquiry.</i>

<p>Search for a Case, Person, Provider, or Worker</p>	<ul style="list-style-type: none"> <li>▪ From the Desktop, select <i>Utilities &gt; Search</i>.</li> <li>▪ From the Search page, select the appropriate tab to complete your search.</li> <li>▪ Enter the applicable search criteria (at a minimum) provide data in the required blue fields, and then click <b>Search</b>. Search results display at the bottom the of the Search page in the Cases, Persons, Providers or Workers Returned group box.</li> <li>▪ Click the Additional Search Criteria expando. <ul style="list-style-type: none"> <li>○ On the Case Tab, it will allow search by Begin or End Date, Status, Case Type, Assignment Type or Sort Type.</li> <li>○ On the Person Tab, it will allow search by Gender or Address.</li> <li>○ On the Provider and Worker Tabs, there is no Additional Search Criteria expando.</li> </ul> </li> </ul>	<p><i>Expand the Search page outliner to find/view specific information about a Case, Person, Provider, or Worker.</i></p>
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<b>FSFN Banner Highlights</b>		<i>FSFN Basics How Do I...Guide</i>
<b>How Do I...?</b>	<b>Selections</b>	<b>Tips &amp; Guidelines</b>
Print a Screen (Page)	 Click the Print Screen icon.	<i>The Print icon only prints the application screen. Use the options dropdown to print template documents.</i>
Create Case Work	 Click the Case Work icon	<i>This is a short cut that you can use instead of Create &gt; Case Work on the menu bar.</i>
Create Provider Work	 Click the Provider Work icon	<i>This is a short cut that you can use instead of Create &gt; Provider Work on the menu bar.</i>
Search for Case, Person, Provider, or Worker.	 Click on the Search icon.	<i>This is a short cut that you can use instead of selecting Utilities &gt; Search on the menu bar.</i>
View On-Line Help	 Click the Help icon.	<i>When you have questions on how to use the FSFN system, you can access FSFN Help by selecting this icon.</i>
View Audit Information	 Click the Audit icon.	<i>The audit icon launches the audit page detailing the workers who have accessed this page.</i>
Refresh The Desktop	 Click the Refresh icon.	<i>Newly created/assigned work will be displayed on the Desktop.</i>
Exit FSFN	 Click the Logout icon.	<i>To exit FSFN, use the logout icon instead of the Windows 'X' close option on the upper right of your screen.</i>
Error Log	 Click the Error Log icon	<i>If you have multiple missing items, when alerted, click this icon to display the missing items as you complete the page. This is only available when you have errors.</i>

How Do I...?	Selections	Tips & Guidelines
View Ticklers for a Specific Case or Provider	<ul style="list-style-type: none"> <li>▪ From the Desktop <b>Cases</b> or <b>Providers</b> expando, click the <u>Actions</u> hyperlink next to the appropriate case or provider.</li> <li>▪ Select <i>View Ticklers</i> radio button, and then click <b>Continue</b>.</li> </ul>	<p><i>View Ticklers allows you to view all ticklers and who is assigned the tickler for a specific case or provider.</i></p>
Create, Complete, and Delete a Manual Tickler	<ul style="list-style-type: none"> <li>▪ From the Desktop, select <i>Maintain &gt; Manual Ticklers</i>.</li> <li>▪ From the Manual Ticklers page, click <b>Insert</b>. <ul style="list-style-type: none"> <li>▪ In the new row, enter the following: <ul style="list-style-type: none"> <li>○ Start Date</li> <li>○ End Date</li> <li>○ Message.</li> </ul> </li> </ul> </li> <li>▪ Click <b>Save</b>, and then click <b>Close</b>.</li> <li>▪ To complete an existing manual tickler, select the <i>Completed</i> Checkbox.</li> <li>▪ To delete an existing manual tickler, select the <u>Delete</u> hyperlink.</li> </ul>	<p><i>If you have previously created manual ticklers, these ticklers will display upon launching the Manual Ticklers page. If no manual ticklers exist, this page will be blank.</i></p> <p><i>Manual Ticklers are not created, updated or deleted by system processes; instead, these electronic notifications of tasks to be completed by a certain time are personal ticklers created by workers which cannot be viewed by other workers.</i></p>

How Do I...?	Selections	Tips & Guidelines
Copy Text	<ul style="list-style-type: none"> <li>In the appropriate text box, highlight the text using your mouse.</li> <li>Hold down the <b>Ctrl</b> and <b>C</b> keys on the keyboard.</li> </ul>	<i>You may also copy text from word processing documents to FSFN using these steps.</i>
Paste Text	<ul style="list-style-type: none"> <li>In the destination text box, place your cursor in the box by single clicking.</li> <li>Hold down the <b>Ctrl</b> and <b>V</b> keys on the keyboard.</li> </ul>	<i>You may also paste text from FSFN into word processing documents using these steps.</i>
Print Screen	<ul style="list-style-type: none"> <li>Instead of selecting Print icon on the banner, hold down the <b>Ctrl</b> and <b>P</b> keys on the keyboard.</li> </ul>	<i>This action will print the displayed page.</i>
FSFN Logoff	<ul style="list-style-type: none"> <li>Instead of selecting Logout icon on the banner, hold down the <b>Alt</b> and <b>F4</b> keys on the keyboard.</li> </ul>	<i>This action will log out of FSFN system application.</i>
Move to Next Field	<ul style="list-style-type: none"> <li>Place your cursor in a field on the page.</li> <li>Select the <b>Tab</b> key.</li> </ul>	<i>This will place your cursor in the next user-entered field.</i>
Move to Previous Field	<ul style="list-style-type: none"> <li>Place your cursor in a field on the page.</li> <li>Hold down the <b>Shift</b> key and select the <b>Tab</b> key.</li> </ul>	<i>This will place your cursor in the previous user-entered field.</i>
Select a Check Box	<ul style="list-style-type: none"> <li>Select the <b>Tab</b> key to navigate to the correct check box, and then select the space bar to check the desired value.</li> <li>Select the Tab key to move to the next field.</li> </ul>	<i>This will select a checkbox.</i>
Select Values From Dropdowns	<ul style="list-style-type: none"> <li>To highlight a value from a long drop down list, select the first letter of your desired value.</li> <li>If the desired value is further down the list, select the letter on the keyboard again or use the Down arrow. Repeat until you have highlighted your desired value.</li> </ul>	<i>If the desired value is further down the list, you can also use the Down arrow. Select the Down arrow until you have highlighted your desired.</i>
Select Buttons or Tabs	<ul style="list-style-type: none"> <li>Hold down the <b>Alt</b> key and the key for the underlined letter of the button or tab you want to select.</li> </ul>	<i>For example, since <b>Create</b> displays with the '<u>C</u>' underlined, hold down the Alt and C keys on the Keyboard.</i>
Switch From FSFN to Other Application	<ul style="list-style-type: none"> <li>Hold down the <b>Alt</b> and <b>Tab</b> keys. You will have a menu of open applications from which to choose.</li> <li>Holding down the <b>Alt</b> key, keep selecting the <b>Tab</b> key until you have selected the page you wish to display.</li> </ul>	<i>This will allow you to have multiple windows open, and allow you to quickly toggle between application/windows.</i>

How Do I...?	Selections	Tips & Guidelines
Search for a Case	<ul style="list-style-type: none"> <li>▪ From the Desktop menu, select <i>Utilities &gt; Search</i>.</li> <li>▪ From the Search page, enter (at a minimum) a Last Name.</li> <li>▪ If entering a search with data in the name fields, set the Search Precision to the setting needed (Low to High).</li> <li>▪ Click <b>Search</b>.</li> </ul>	<p>You can also click the <b>Search</b> icon at the top of the Desktop to open the Search page.</p> <p><i>If needed, narrow the search further by entering additional known information such as County or Case ID. Setting the Search Precision to a lower setting will expand the search results. Placing the setting at High will return results that are an exact match based on the information entered in the Last and First Name fields.</i></p>
Search for a Person	<ul style="list-style-type: none"> <li>▪ From the Desktop, select <i>Utilities &gt; Search</i>.</li> <li>▪ From the Search page, click the <b>Person</b> tab.</li> <li>▪ Enter (at a minimum) a Last Name.</li> <li>▪ If entering a search with data in the name fields, set the Search Precision to the setting needed (Low to High).</li> <li>▪ Click <b>Search</b>.</li> </ul>	<p>You can also click the <b>Search</b> icon at the top of the Desktop to open the Search page.</p> <p><i>If needed, narrow the search further by entering information in the DOB, Gender, Street, City, and Zip Code fields. Setting the Search Precision to a lower setting will expand the search results. Placing the setting at High will return results that are an exact match based on the information entered in the Last, First and Street Name fields.</i></p>
Search for a Provider	<ul style="list-style-type: none"> <li>▪ From the Desktop, select <i>Utilities &gt; Search</i>.</li> <li>▪ From the Search page, click the <b>Provider/Organization</b> tab.</li> <li>▪ Enter (at a minimum) a Provider/Organization name.</li> <li>▪ If entering a search with data in the name fields, set the Search Precision to the setting needed (Low to High).</li> <li>▪ Click <b>Search</b>.</li> </ul>	<p>You can also click the <b>Search</b> icon at the top of the Desktop to open the Search page.</p> <p><i>If needed, narrow the search further by entering information in the Provider Type, Site, County, and Zip Code fields. Setting the Search Precision to a lower setting will expand the search results. Placing the setting at High will return results that are an exact match based on the information entered in the Provider/Organization Name and First Name fields.</i></p> <p><i>The "Search Providers of Parent Agency" checkbox will return the parent agency and all providers under that parent agency.</i></p>
Search for a Worker	<ul style="list-style-type: none"> <li>▪ From the Desktop, select <i>Utilities &gt; Search</i>.</li> <li>▪ From the Search page, click the <b>Worker</b> Tab.</li> <li>▪ Enter (at a minimum) a Last Name.</li> <li>▪ If entering a search with data in the name fields, set the Search Precision to the setting needed (Low to High).</li> <li>▪ Click <b>Search</b>.</li> </ul>	<p>You can also click the <b>Search</b> icon at the top of the Desktop to open the Search page.</p> <p><i>If needed, narrow the search further by entering information in the County field. Setting the Search Precision to a lower setting will expand the search results. Placing the setting at High will return results that are an exact match based on the information entered in the Last and First Name fields.</i></p>

How Do I...?	Selections	Tips & Guidelines
Enter a Note On a Case or Provider Assigned to You	<ul style="list-style-type: none"> <li>▪ From the Desktop, select <i>Create &gt; Case Work</i> or <i>Provider Work</i>.</li> <li>▪ Select the appropriate Narrative list item, Case/Participant, or Provider.</li> <li>▪ Click <b>Create</b>.</li> </ul>	<p><i>Use the spell check feature on the banner to spell check the note before the note is finalized.</i></p>
Enter a Note On Case or Provider Not Assigned to You	<ul style="list-style-type: none"> <li>▪ From the Desktop, select <i>Utilities &gt; Search</i>.</li> <li>▪ From the Search page click the Case or Provider/ Organization tab, enter the applicable data/values.</li> <li>▪ Click <b>Search</b>.</li> <li>▪ Select <u>Actions</u> hyperlink for the appropriate Case/Provider.</li> <li>▪ Select <i>Create Case Note</i> radio button and click <b>Continue</b>.</li> </ul>	<p><i>Notes are one exception in FSFN where you can enter information on a Case or Provider that is not assigned to you.</i></p> <p><i>Only the worker identified as the Worker Creating Note or the Worker Making Contact with an assignment to the Case or Provider can edit the note.</i></p>
Search for a Note for Specific Case or Provider	<ul style="list-style-type: none"> <li>▪ From the Desktop <b>Cases</b> or <b>Providers</b> expando, click the <u>Actions</u> hyperlink next to the appropriate case or provider.</li> <li>▪ Select the Case/Provider Note Criteria Search radio button, and then click <b>Continue</b>.</li> <li>▪ From the Case Note Search Criteria page, enter the available search criteria: <ul style="list-style-type: none"> <li>▪ From the Categories and Type of Criteria group box, click on appropriate Categories. Hold down the 'Ctrl' key to make multiple selections in a field. Click <b>Add</b> or <b>Add All</b>. Based on the Categories field selection, the Types field is automatically populated.</li> <li>▪ Click the appropriate Type from the populated Types field.</li> <li>▪ Click Selected Categories field option, and then click appropriate participants you want to select in the Case Participants field.</li> <li>▪ Click <b>Search</b>. If Validation Errors pop-up displays 'No records were found that match the criteria,' click close to return to the Case Note Search Criteria page. If search is successful, Case Note Search Results page displays returned results.</li> <li>▪ Select the <u>View</u> hyperlink and Case Notes for selected participant display.</li> </ul> </li> </ul>	<p><i>Once Case Note Search Results page displays, you can select <u>Print</u> hyperlink to print searched note for a specific Case or Provider.</i></p>
Print a Specific Note	<ul style="list-style-type: none"> <li>▪ From the Desktop <b>Cases</b> or <b>Providers</b> expando, click the applicable Case or Provider icon to select the appropriate Narrative item.</li> <li>▪ From the Case Notes or Provider Notes page, select View Note or View History from the Options drop down list, and click <b>Go</b>.</li> <li>▪ Note is launched in a separate Word document, and can be viewed and printed.</li> </ul>	<p><i>Printing a document launched from the Options drop down, may prompt a dialog page requiring you enable or disable macros prior to viewing the document.</i></p>

How Do I...?	Selections	Tips & Guidelines
<p>Submit Work for Supervisory Approval</p>	<ul style="list-style-type: none"> <li>▪ Open the piece of work.</li> <li>▪ From the Options dropdown, select <i>Approval</i>, and then click <b>Go</b>.</li> <li>▪ From the Approvals History page, click one of the Approval Decision radio buttons:                             <ul style="list-style-type: none"> <li>▪ To submit to the work for supervisory approval to your supervisor, select <i>Approve</i>.</li> <li>▪ To take no further action and “freeze” the work, select <i>Not Approve</i>. <b><u>THIS OPTION SHOULD NOT BE USED EXCEPT UNDER SPECIFICALLY PRESCRIBED CIRCUMSTANCES, AS THIS WILL FREEZE THE PIECE OF WORK AND ADDITIONAL EDITS CANNOT BE MADE.</u></b></li> <li>▪ To route the supervisory approval request to another supervisor, select <i>Reroute</i>.</li> <li>▪ If you select <i>Other</i> in the Supervisor group box, the Create Worker Assignment page displays.</li> <li>▪ To return the approval request after it is submitted, select <i>Recall/Return</i>. The work is sent back to the initiating worker, who must then resubmit the approval request.</li> </ul> </li> <li>▪ Click <b>Continue</b>.</li> <li>▪ From the piece of work, click <b>Save</b>.</li> </ul>	<p><i>This will allow you to view the complete approval history chain once a piece of work has received final approval.</i></p> <p><i>The status assigned to both the work and the worker determines the level of approval required to complete assigned work. All approval actions are documented on the Approval History page.</i></p>