Florida Safe Families Network

Maintain Case How Do I … Guide

March 17, 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…

View/Update a Case		
How Do I…?	**Selections**	**Tips & Guidelines**
View/Update Case	• From Desktop, click **Cases** expando. • Click on case name. • **Maintain Case** page displays and defaults to **Participants** tab. • Select **Relationships**, **Address**, **Professional/Family Support Network Contacts**, or **Closing History** tab to enter updated field information, if applicable. • Enter **CLS Case Name**, if applicable. • Click the **Options** drop down and select value, if applicable. • Click **Go**. • If **Submit Case Closure** is selected, select **Reason** from the drop down, enter **Closure Summary** text, and other field information, if applicable. • Click **Save** • Click **Close**. • If Delink Intake is selected, enter appropriate information on the **Delink Intake** page. • Click **Save**. • Click **Close**. • Once appropriate updates are entered, click **Save**. • Click **Close** once all updates have been saved or to close the page without making updates.	*CLS Case Name is a secure field that will only be enabled for users with the applicable security rights.*

View/Update a Case		
How Do I…?	**Selections**	**Tips & Guidelines**
Update Case Address	• From the Desktop, click **Cases** expando. • Click on case name hyperlink. • **Maintain Case** page displays and defaults to **Participants** tab. • Click **Address** tab. • Enter applicable data/values. • Click **Save**. • Click **Close**. • To apply the case address to all case participants, update appropriate fields, and then click **Update**.	

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<tr><th>How Do I…?</th><th>Selections</th><th>Tips & Guidelines</th></tr>
<tr><td>Add Professional/ Family Support Network Contacts</td><td>From Maintain Case page, click Professional/Family Support Network Contacts tab.
From Professional Contacts group box, click Insert.
On Search Person page, enter applicable data/values.
Click Search.
For a match:
Click Select hyperlink for applicable person(s).
Click Continue.
For no match:
Click Close on Validation Errors pop-up web page dialog.
Click Create to access Person Management page.
Enter all applicable data/values for new person.
Click Save and then Close on Person Management page.
On Search Person page, click Continue, and then click Save.
From Family Support Network Contacts group box, click Insert.
Enter Name, Role, and Phone information.
Click Save.</td><td>After completing the Person Management page to create the record for a new Professional Contact for whom there was no match, you will be returned to the Search Person page to complete the search in order to add the Professional Contact to the case.

To delete a Professional Contact, click on the Delete hyperlink for the applicable Professional Contact.

To delete a Family Support Network Contact, click on the Delete hyperlink for the applicable Family Support Network Contact.

When searching for a person using the SSN field, use the following guidelines.

You cannot enter a SSN with the following:
The first three digits of 000, 666, 900 series.
The second two digits of 00 or the last four digits of 0000.
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.</td></tr>
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View/Update a Case		
How Do I…?	**Selections**	**Tips & Guidelines**
Delink an Intake from a Case	• From Desktop, click **Cases** expando. • Click case name hyperlink. • From the **Options** dropdown, select ***Delink Intake***. • Click **Go**. • **Delink Intake** pop-up page will display. • Select radio button for Intake to delink. • Click **Save**.	*When delinking a Service Referral, there must be at least one (1) additional Service Referral linked to the Case. FSFN will not allow the delink to occur if the user attempts to delink the last remaining Service Referral on a Case.* *Any work completed on the Investigation beyond the initial commencement process will preclude the ability to delink the Intake from the Case. Due to the integral relationship of the Intake to the Investigation, an Intake (i.e. Child Intake, Adult Intake, or Special Conditions Intake) currently linked to an Investigation that has progressed beyond the initial commencement can no longer be delinked and will be prevented. Initial commencement occurs when the Investigation shell is created and the commencement note(s) is recorded.* *If the Investigation shell and commencement note(s) have been created, but no additional work on the Investigation exists, the Intake may still be delinked. However, when delinking at this point, the Investigative shell and any associated commencement note(s) will be deleted and must be re-entered when the intake is again relinked to the correct case.*

View/Update a Case		
How Do I…?	**Selections**	**Tips & Guidelines**
Complete the Milestone Events List	• Click **Milestones** hyperlink. • Enter date for all the fields: **Date of First Removal Episode from Home (Ever)**. **Surrenders Signed – Father and Surrenders Signed – Mother**. . **Termination of Parental Rights Finalization**. **Initial Health Check-Up Scheduled.** . **Initial Health Check-Up Conducted.** **Next Health Check-Up Follow-Up Scheduled.** **Health Check-Up Follow-Up Conducted.** **Dental Health Check-Up Scheduled**. **Dental Health Check-Up Conducted.** • Click **Save**. • Click **Close**. • You are returned to the Maintain Case page.	*The Milestones hyperlink will open the associated Case Participant's Milestone Events List.* *All fields, except those identified in the Selections column, are pre-filled by the system.*

Add/View/Update a Case Participant

How Do I…?	Selections	Tips & Guidelines

Add Case Participant	• From the Desktop, click **Cases** expando.
	• Click on case name hyperlink.
	• **Maintain Case** page displays and defaults to **Participants** tab.
	• Click **Insert**.
	• From **Search Person** page, enter applicable data/values.
	• Click **Search**.
	  ◦ For a match:
	    ▪ Click **Select** hyperlink for applicable person(s).
	    ▪ Click **Continue**.
	  ◦ For no match:
	    ▪ If displayed, click **Close** on **Validation Errors** web page dialog box on **Search** page.
	    ▪ Click **Create** to access **Person Management** page.
	    ▪ Enter all applicable data/values for new person.
	• Click **Save** and then **Close** on **Person Management** page.
	
	On **Search Person** page, click **Continue**.
		After creating a new person, if potential person matches exist within FSFN, the Potential Person Match page will display a list of participants that appear to be an exact person match.
		Note that FSFN will not return participants for selection if they are flagged in the database as a "pre-adoptive" Person ID.
		
		To proceed with creating a new person without selecting a match from the list, click Close. When adding a participant, the system allows a user to search by SSN. When searching for a person using the SSN field, use the following guidelines.
		
		You cannot enter a SSN with the following:
		• *The first three digits of 000, 666, 900 series.*
		• *The second two digits of 00 or the last four digits of 0000.*
		• *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.*
		
		The system identifies and makes visible (bolded duplicate SSN) any duplicated social security numbers.
		
		When creating or updating a person in Maintain Case, if you add or update a person discovered to have a duplicate SSN, the Potential Person Match opens. You will be required to view every duplicate SSN record listed before the system will allow the duplicate SSN. Once viewed the persons record will display the Viewed icon with a check mark. After the duplicate records have been viewed, the "Allow Duplicate SSN" button will be enabled.
		
		When the Case Type drop down on the Maintain Case Page is selected, the existing values of In –Home Voluntary and Out-of-Home will display as In-Home Non-Judicial and Out-of-Home Non Judicial. Therefore, all pre-existing FSFN Maintain Case Pages where the In –Home Voluntary and Out –of-Home-Voluntary were selected will automatically reflect the new language upon implementation.

Add/View/Update a Case Participant

How Do I…?	Selections	Tips & Guidelines
View/Update Case Participant	• From the Desktop, click **Cases** expando. • Click on case name hyperlink. • **Maintain Case** page displays and defaults to **Participants** tab. • From **Participants** group box, select participant name hyperlink. • From **Person Management** page for selected participant, enter applicable data/values in appropriate fields or view information on **Basic**, **Additional**, **AKA Names**, **Address**, **Relationship** and **Disability/AFCARS** tabs. • Click **Save**. • Click **Close**. • Once appropriate updates are entered, click **Save**. • Click **Close** once all updates have been saved or to close page without making updates.	*When the First Name or Last Name fields are updated, a confirmation dialog box displays for you to confirm whether you want to create an AKA record for the previous name. Clicking 'Yes' will prompt FSFN to automatically create a row on the AKA tab.* *Only a supervisor can remove a participant.* **Deactivate**, **Reactivate**, and **Remove** hyperlinks display for each participant on Participants tab of Maintain Case. • Use **Remove** to delete from case. • Use **ReActivate** or **DeActivate** to change status. ***NOTE:*** *A participant that is de-activated for reason of Adoption Finalization cannot be reactivated once the new Post Adoption Finalization Case has been created and saved through the Create New Case after Finalization process.*
Remove an unknown participant from the Case	• Click **Remove** hyperlink. • Validation message displays, asking if the user is sure they want to continue with removing the Unknown participant and prompts the user to perform the Person Merge process. • Click No. • Select Unknown person hyperlink. • Click **Merge** button. • Search for participant. • Click **Continue**. • Click **Merge** button. • Click **Yes** to validation message. • Click **Close**.	*The user will see a validation message and will be prompted to navigate to the Person Management page and into the Merge workflow. However, the user is not required to perform a Person Merge.*

Add/View/Update a Case Participant		
How Do I…?	**Selections**	**Tips & Guidelines**
View/Update Participant Relationship	• From the Desktop, click **Cases** expando. • Click on case name hyperlink. • **Maintain Case** page displays and defaults to **Participants** tab. • Click **Relationship** tab. • Click **Insert** to add relationships. • Click **Delete** hyperlink to remove a displayed relationship. • Click **Save**. • Click **Close** after all updates have been saved or to close page without making updates.	*Anytime a new relationship is added to the Relationships tab of the Maintain Case page, and the page is saved, the system will automatically insert the reverse relationship based on a defined rule table.* *Upon selecting save if there are duplicate relationships, the following validation message is displayed:* ***A duplicate relationship exists for the following participants on the Relationships tab [Name] to [Name]. <OK>***
View/Update Participant Address	• Access **Participants** tab. • Within **Participants** group box, click on participant name. • Click **Address** tab. • Click on **Edit** hyperlink to update address. • On Address Management page, enter applicable data/values.	*FSFN will store an unlimited number of addresses for a person.*

Merge Case Participants

How Do I…?	Selections	Tips & Guidelines
Merge Potential Person Match	• On **Maintain Case** page, insert a new person. • Search for an identical person that is currently on case. • Enter exact SSN from identical person in new person's record. • Click **Save**. • From **Potential Person Matches** page, select participants and verify view checkmark displays. • Click **Allow Duplicate SSN** button. • From **Person Management** page, click **Merge** button. • Search for Retained Person. • Select radio button next to person you want to merge. • Click **Continue**. • Click **Merge** button. • Click **Yes** to validation message. • Merge record is complete. • Click **Close**.	*You can view the merged participant on the Person Management AKA tab.*
View Case Merge History	• From an existing **Maintain Case** page previously merged into another case, click **Closing History** tab. • Within **Merged Cases** group box, review **Open Date**, **Merged Date**, **Former Case Number**, and **Reason**. • Click **Save**. • Click **Close**.	*When a case is merged into another, FSFN maintains a record of the 'remove' case's previous information, and provides a high level overview on the Closing History tab. The overview indicated the Open Date, Merged Date, Former Case Number, and Reason was for the Merge. Because a Case can be merged into another multiple times, the Merged Cases group box provides overview information for each merge occurrence.*

Split a Case		
How Do I…?	**Selections**	**Tips & Guidelines**
Split A Case	• From the **Options** drop down of an existing **Maintain Case** page containing more than one active participant, select ***Split Case***. • Click **Go**. • **Split Case Participant Selection** pop-up page displays. • Within **Case Participants** group box, check boxes for all active participants default to selected. • In **Explanation for Case Split** text field, enter *Participants should be in a separate case*. • Click **Continue**. • New **Maintain Case** page displays with selected participants displayed on **Participants** tab in **Participants** group box. • Click **Save**. • Click **Close**.	*Upon selecting the Continue button on the Split Case Participant Selection pop-up page and saving the new Maintain Case page, the participant(s) will become de-activated in the originating case.* *The address in the new case will default to the Case Address from the originating case. The Case Address that pre-fills from the originating case will be displayed on the address tab as the Primary, but the worker can create a new address in the new case to update it, and the pre-filled address will become historical. The Family Structure in the new case will always default to 'Unable to Determine.' Case Name, Legal Status, Service Roles, County, and Case Type will all pre-fill in the new case from what is in the originating case. All the remaining fields in the new case will remain blank until/unless the worker updates them.* *The new, split case will have a 'Split Case' designation in the 'Case' header group box.* *Upon selecting Continue, and subsequently saving the newly created case, the system will automatically transpose the narrative, documenting the reason for the case split, into a case note. The Case Note will be given a note type of 'Case Split,' have the narrative captured on the 'Split Case Participant Selection' page, and have a 'Start Time' of when the Save was successfully initiated and processed on the newly created case.*

Close a Case		
How Do I…?	**Selections**	**Tips & Guidelines**

Create Case Closure	• From the Desktop, click **Cases** expando.
	• Click on case name hyperlink.
	• Click **Closing History** tab.
	• From **Options** drop down, select ***Submit Case Closure Request***.
	• Click **Go**.
	• Select ***Request for Closure*** check box.
	• Select **Reason**.
	• Enter **Closure Summary**.
	• If a completed checklist is required to request case closure:
	  ◦ From **Closing Checklist** drop down, select ***Ongoing Case Closure Checklist***.
	  ◦ From **Options** dropdown, select ***Checklist***.
	  ◦ Click **Go**.
	  ◦ Complete checklist.
	  ◦ Select ***Checklist Complete?*** check box.
	  ◦ Click **Save**.
	  ◦ Click **Close**.
	• If a completed checklist is not applicable, select ***Click Here If Case Closing Checklist is Not Applicable***.
	• Click, **Save**.
	• Click **Close**.
		FSFN allows users to open, close, and re-open cases several times. To ensure that workers have access to historical information, the Closing History tab displays information about each case closing.
		
		The Case History group box contains a record for every case closure. Each record displays the open and closed dates, and the reason for closure.

Close a Case		
How Do I…?	**Selections**	**Tips & Guidelines**
Complete Case Closure	• From the Desktop, click **Cases** expando. • Click on case name hyperlink. • **Maintain Case** page displays. • Click **Closing History** tab. • Click case closure status hyperlink, if applicable.	*If a case is undergoing a closure, you will not be able to request a new case closure for the case.* *The closure status will remain pending until the nightly batch process prepares and verifies the closure request.* *Case closure status (Pending, Not Requested, Requested, Denied, Accepted, Historical) is updated by the FSFN batch program that checks to determine whether the case work is completed and the case can be closed.* *A value of Accepted activates the Approvals button.* *The request for case closure may be denied if any of the following items is not completed:* ▪ *PS Reports without completed Initial Assessments* ▪ *Open Family Support (not "Complete")* ▪ *Open Living Arrangement* ▪ *Open Private Adoption page* ▪ *Open Placement, Medicaid Certifications Not Complete* ▪ *Pending or Ongoing Plans,* ▪ *Participants in Protective Custody or Approval Processing Not Complete* ▪ *Open Present Danger Assessment* ▪ *Open Safety Plan (not terminated)* ▪ *Open FFA – Ongoing* ▪ *Open Progress Update* ▪ *Open Case Plan Worksheet* ▪ *Open Judicial Review Worksheet*

Close a Case		
How Do I…?	**Selections**	**Tips & Guidelines**
Complete Case Closure (cont'd)	• If case closure request is accepted: ◦ Click the Accepted hyperlink on the Closing History tab. ◦ From **Options** dropdown, select ***Approval***. ◦ Click Go. ◦ From **Approval History** page, select ***Approve*** *radio button*. • If default supervisor is incorrect, reroute approval. ◦ Click Continue. ◦ Click Save. ◦ On **Closing History** tab, click **Close**. • If case closure request is denied: ◦ On **Case Closure** page, expand **Closure Denial Messages** section or refer to **Closure Denial Report** for information regarding issues that need to be resolved before case closure request can be accepted. ◦ From **Options** dropdown, select ***Closure Denial Report***. ◦ Click **Go**. ◦ Review and correct incomplete or missing work. ◦ Re-submit case closure request, if applicable.	*Note: For case closure requests that have been denied, you may have incomplete work or you may be missing work which requires you to create new work to address case closure denial reason.* ▪ *If case closure request was denied due to incomplete work, after you finish any incomplete work, FSFN automatically processes pending case closure request again. There is no need to re-submit case closure request. However, you must perform the steps outlined to ensure request is approved once accepted, and case is subsequently closed.* ▪ *If case closure was denied due to missing work, which requires new work to be created, select Not Approve for closure request. Selecting Not Approve will end request process allowing you to create new work for case. You must then re-submit case closure request.*

Merge a Case		
How Do I…?	**Selections**	**Tips & Guidelines**
Merge case (open to closed OR open to open)	• From the **Options** drop down of an existing, open case, select **Submit Case Closure Request** and select the **Go** button. • The **Case Closure** page is displayed. • Select the **Request for Closure** check box. • From the **Reason** drop down field, select **Merge**. • A merge hyperlink is displayed to the right of the **Reason** drop down field. • Select the **Merge** hyperlink. • The **Case Search** page is displayed. • Search and select a destination case, in which to merge the existing case. • Click **Continue**. • The Case closure page is displayed. • Click **Save**. • A validation message is displayed. • Select the "**Yes**" button. • Click **Close**.	*Cases with the Case Type of Post Adoption Services cannot be merged.* *If the same participant exists in both cases and has a Trust Account in both cases, the cases cannot be merged.* *Once the batch has accepted the Case Closure and Supervisor Approval occurs, the system automatically transposes the narrative documented in the "Closure Summary" text field into a case note. The Case Note is given a note type of "Case Merge," contains the narrative captured in the "Closure Summary" on the Case Closure page, and has a "Start Time" of whenever the supervisor approval occurred.* *In addition, once the batch has accepted the Case Closure and Supervisor Approval occurs, the following five pieces of work will be accessible from within a "Merged Case" folder icon displayed within the "kept" case: Medical/ Mental Health; Education; Interim Child Information; Legal Record; and Independent Living. All other pieces of work will be displayed within the "kept" case.*

Merge a Case		
How Do I…?	**Selections**	**Tips & Guidelines**
Merge case (closed to open OR closed to closed)	• From the **Options** drop down on the **Closing History** tab, of an existing, closed case, select **Merge Case** and select the Go button. • The **Case Closure** page is displayed. • Select **Merge** from the **Reason** drop down field. • A merge hyperlink is displayed to the right of the **Reason** drop down field. • Enter “Case Merge” in the **Closure Summary** narrative text field. • Select the **Merge** hyperlink. • The **Case Search** page is displayed. • Search and select a destination case, in which to merge the existing case. • Click **Continue**. • The Case Closure page is displayed. • Click **Save**. • A validation message is displayed. • Select the “**Yes**” button. • Click **Close**.	*When working within a closed case, upon selecting the Merge Case option from the Options drop down on the Closing History tab, the Case Closure page is opened and only the Reason drop down and narrative text field, within the Closure Summary group box, are enabled and both are required.* *When performing the merge process from a closed case, because the batch process was already performed, and closure accepted and approved, once the “Yes” button is selected on the validation message, there is no way to stop the merge process. The current, closed case will be merged into the selected destination case.* *Once merge process is initiated by selecting “Yes” on the validation message, the system automatically transposes the narrative documented in the “Closure Summary” text field into a case note. The Case Note is given a note type of “Case Merge,” contains the narrative captured in the “Closure Summary” on the Case Closure page, and has a “Start Time” of whenever the Case Closure page was saved and merge occurred.* *In addition, once the batch has accepted the Case Closure and Supervisor Approval occurs, the following five pieces of work will be accessible from within a “Merged Case” folder icon displayed within the “kept” case: Medical/ Mental Health; Education; Interim Child Information; Legal Record; and Independent Living. All other pieces of work will be displayed within the “kept” case.* *This process also prompts Florida Access to update and issue a new Florida PIN for the child. This PIN is displayed on the child’s new Person Management record.*

Create Background Checks		
How Do I…?	**Selections**	**Tips & Guidelines**
Create Background Checks	• From the **Options** drop down on an existing case, select ***Create Background Checks***. • Click **Go**. • **Create Background Checks** pop-up page displays. • Select the **Request Type** radio button: Emergency Placement, Planned Placement or Reunification. • Select check box for the case participant, 12 years of age or older. • Click **Request Background Check**. • Click **Close**.	Request Type radio button options are Emergency Placement, Planned Placement or Reunification. Upon selecting the Request Background Check button, certain pieces of data that are necessary for processing background checks are not required when submitting the request. The system will verify the data is captured and only once the validations are met will the request be submitted to the Background Check Listing queue. When the Request Type is Emergency Placement, additional validations for the Emergency Placement Background Checks will verify the data is captured and only once the validations are met will the Emergency Placement certification prompt be displayed.

Create a New Case after Finalization

How Do I…?	Selections	Tips & Guidelines
Create New Case After Finalization	**Do not do this until the following is completed:** a. Create and a complete Non-Waived Non-Voided Title IV-E Foster Care Eligibility Determination b. Create a Non-Terminated Adoption Subsidy Agreement Information page c. A Non-Voided Non-Terminated IV-E Adoption Eligibility record that has been approved and eligibility status has been determined by FLORIDA d. If a TANF exists for the child, it must be approved. e. End Date of child's current placement for reason of Adoption Finalization f. Deactivate child for reason of Adoption Finalization • From the **Options** drop down on an existing case, select ***Create New Case after Finalization***. • Click **Go**. • **Create New Case after Finalization** pop-up page displays. • Select check box(es) for applicable child(ren). • Click **Search** hyperlink. • **Case Search** page displays. • Enter search criteria. • Click **Search**. • Select radio button for case of searched child. • Click **Continue**. • **Create New Case after Finalization** pop-up page displays. • Click **Continue**. • New Post Adoption Services case displays. • Click **Save**. • Click **Close**.	*The page displays all children who meet the following criteria:* • *Have been deactivated for the reason of Adoption Finalization* • *Placement was ended for the reason of Adoption Finalization* • *Must have a Non-Waived, Non-Voided Title IV-E Foster Care Eligibility Determination* • *Must have a Non-Terminated Adoption Subsidy Agreement Information page* • *Must have a Non-Voided, Non-Terminated, IV-E Adoption Eligibility record that has been approved* • *If a TANF exists for the child, it must be approved* *The worker can choose to either place the child in an existing case or create a new case. This is to accommodate situations where a sibling was already placed with the same Adoptive family, and the worker wishes to place this child with that same family. If there is not an existing case to place the child in, the user can select the Create button to create a new FSFN Post Adoption Services case.* *Only children that were in the same, most recent Out of Home Placement can be placed in the same Post Adoption Services case when performing the Create New Case after Finalization functionality.* *Note: If a child has unfinished transactions with the FLORIDA System they will not display on the Create New Case after Finalization pop-up page.* *Note also that a new FLORIDA PIN will be created and displayed on child's new Person Management record.*

Launch ICPC Checklists		
How Do I…?	**Selections**	**Tips & Guidelines**
Launch ICPC Parent Checklist	• From **Options** drop down of an existing case, select ***ICPC Parent Checklist***. • ICPC Parent Checklist template displays. • Click **Save**. • Click **Close**. • You are returned to the Desktop.	*Launches the ICPC Parent Checklist for children going from Florida to another State*
Launch ICPC Priority Reg. 7 Checklist	• From **Options** drop down of an existing case, select ***ICPC Priority Reg. 7 Checklist***. • ICPC Priority Reg. 7 Checklist displays. • Click **Save**. • Click **Close**. • You are returned to the Desktop.	*Launches the ICPC Priority Reg. 7 Checklist for children going from Florida to another State*