Prepared for State of Florida Department of Children and Families

Maintain Services
User Guide

April 1, 2016

Change History

Release # / Date	CR # or Incident #	Change Description	Author(s)	Section Modified
R3a 12/15/2013	Transformation	Initial submission	FSFN Projects Team	Entire Document
11/11/2015	CR 607	Adoption Incentives Enhancements	FSFN Enhancement Team	Maintain Service Type & Rate section
11/30/2015		Reformatted paper, including new headers and footers	Leah Dienger	Full document

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About FSFN User Guide

The Florida Safe Families Network (FSFN) User Guide helps you understand the steps to complete your work in the FSFN system. This user guide does not cover every system feature built into FSFN, but describes the most commonly used functions to complete your day-to-day work in the FSFN application. This user guide, when used with Online Help and the How Do I Guides, helps you successfully use the FSFN system as a support tool in your important work of safeguarding the safety, permanence, and well-being of children, families, and adults of Florida.

The Intended Audience

This user guide serves a wide audience of FSFN end users who include:

- Fiscal Workers
- Provider Management
- Fiscal Supervisors
- Support and Data Entry Staff

Prerequisite Knowledge

This user guide was developed with specific prerequisite expectations. Before reading this guide, read the following information. If you need to refer to additional User Guides, How Do I Guides, or other information, visit the DCF FSFN Website (http://fsfn.dcf.state.fl.us).

- You must have a working understanding of the Florida Department of Children and Families Policies and Practices as related to the use and operation of FSFN.
- You must have a working understanding of the basic FSFN navigation and functionality. See the Multi-Topic Basics User Guide and How Do I Guide.
- If you are a supervisor, also see the Multi-Topic Supervisory User Guide and How Do I Guide.

Related Resources

Visit the DCF FSFN Website (http://fsfn.dcf.state.fl.us) for online access to additional resources that support FSFN system end users, including:

- FSFN Project Information
- Online Web-based Training (WBT)
- User Guides
- How Do I Guides (job aids)
- Topic Papers (System Functionality Design)
- Reference Data (Selection Values)

Security Information

FSFN restricts your ability to create, modify, and view specific information through the security profile associated with the Login Profile you used to access FSFN. Specific security is applied across all information. For example, if you do not have authorization to access restricted cases without an assignment, FSFN restricts your access.

NOTE: If there is special security necessary for a task described in this User Guide, it will be identified.

Key Tasks

This User Guide contains information to help the user:

- View Service Types
- Create Service Types
- Maintain Service Types
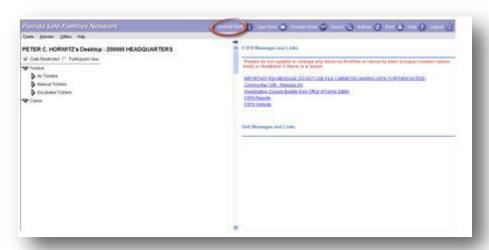
List Services Page

About List Services

This page provides a list of service types and the ability to create a new service type by copying an existing service type. This includes filter criteria for service category, service type, reporting category, active/inactive, and placement/service. This page remains open when launching the Service Type page from this page.
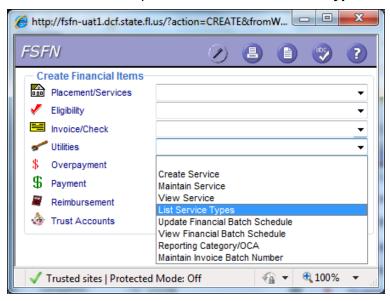
Key Tasks

To view or create Service Type Information

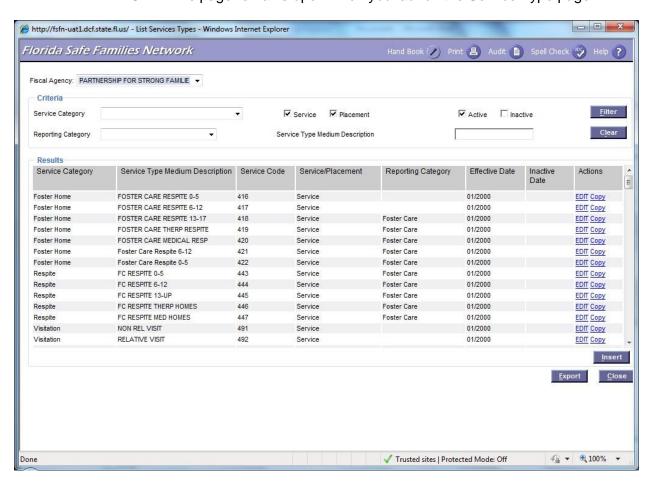1. From the **Desktop**, click the **Financial Work** icon on the banner bar.

2. From the **Utilities** drop down, select *List Service Types*.

3. Click **Continue**.

4. The **List Service Types** page displays.

   📝**NOTE**: This page remains open when you launch the Service Type page.

5. From the **Fiscal Agency** drop down, choose a Fiscal Agency.

6. From the **Criteria** group box's **Service Category** drop down, choose a service category, if applicable.

7. From the **Reporting Category** drop down, select a reporting category, if applicable.

   📝**NOTE**: When this field is completed, the results display only service types associated with that reporting category.

8. Select the **Service** checkbox to display only service types with a selected **Service** Radio button.

9. Select the **Placement** check box to display only service types with a selected **Placement** radio button.

10. The **Active** checkbox defaults to selected and displays only service types without an inactive date or with a future date.

11. Select the **Inactive** checkbox to display service types with an inactive date before the current date.

NOTE: The Inactive checkbox defaults to unselected.

12. In the **Service Type Medium Description** field, enter the Service Type Medium Description to display only Service Types with a match on any part of the string entered in the **Results** group box.

13. Click the **Filter** button to refresh the list using the currently selected values for the
Active and **Inactive** checkboxes.

14. Click the **Clear** button to reset the criteria to their default value.

15. Click the **Export** button to export the results into a file with column headers that can be viewed using a spreadsheet tool such as MS Excel.

16. Click **Close** to return to the Desktop.

NOTE: In the Results group box, filtered results will pre-fill as read-only data and will include the following information: Service Category, Service Type Medium Description, Service Code, Service/Placement, Reporting Category, Effective Date, and, if applicable, the Inactive Date.

To edit or copy Service Type Information

1. Click the **Edit** button to open the **Service Type** page for the associated row in edit mode.

NOTE: This hyperlink is conditionally visible when the user has edit access for the Service Type page.

2. Click the **Copy** button to open the **Service Type** page for the associated row in create mode. The Service Type page displays pre-filled with the selected row's values.

NOTE:This hyperlink is conditionally visible when the user has create access for the Service Type page.

To create a new Service Type

1. Click the **Insert** button. This launches a blank **Service Type** page in create mode.

NOTE: This button is conditionally visible when the user has create access for the Service Type page.

Maintain Services

About Maintain Services

The Fiscal Supervisor can create and update services, while the Fiscal Worker can only update services.

NOTE: The Service Category of Post Adoption Services has its own separate Security Resource which will prevent users without this level of Security from creating new Service Types under Post Adoption Services. Similarly, users may have Security to create Post Adoption Services "Services Types" but not the security to create Services Types under any other Service Categories.
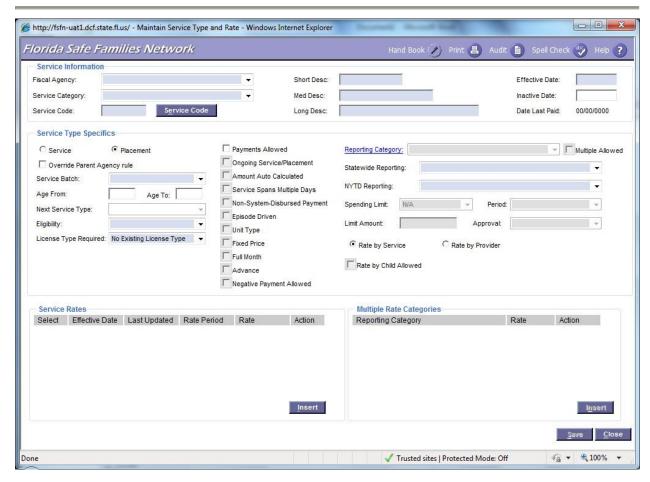
Key Tasks

To create a Service Type

1. From the **Desktop**, click the **Financial Work** icon on the banner bar.
2. From the **Utilities** drop down, select **Create Service**.
3. The **Maintain Service Type and Rate** page displays.

4. From the **Service Information** group box **Fiscal Agency** drop down, select a Fiscal Agency.

5. From the **Service Category** drop down, select a **Service Category**.

6. In the **Service Code** field, manually enter a Service Code or click the **Service Code** Button to pre-fill the field with a system generated unique Service Code.

7. In the **Short Desc** field, manually enter a short name (15 characters) for the service type.

8. In the **Med Desc** field, manually enter a medium name (25 characters) for the service type.

9. In the **Long Desc** field, manually enter a long name (40 characters) for the service type.

10. In the **Effective Date** field, enter the effective date (mm/yyyy).

NOTE: This can be a future or past date.

11. In the **Inactive Date** field, enter the date the service type is no longer active (mm/yyyy).

NOTE: This can be a future or past date.

12. In the **Date Last Paid** field, review the date of the last recorded payment for the specific service type.

To create Service Type Specifics

1. In the **Service Type Specifics** group box, select the **Service** radio button if this service type is a service, or click the **Placement** radio button if this service type is a placement.

2. Select the **Override Parent Agency Rule** checkbox to override the Parent Agency Rule and issue a payment directly to the provider.

3. From the **Service Batch** drop down, select the category to use to group payments relating to the specific service.

4. In the **Age From** field, enter the youngest age in years from 0 to 98 required in order to receive a service.

NOTE: When this optional field is used, the Age To field becomes required.

5. In the **Age To** field, enter the oldest age in years from 0 to 98 required in order to receive a service.

6. In the **Next Service Type** drop down, select a Service Category.

7. In the **Eligibility** drop down, select *Exclude from Claiming*, *Applicable*, *Not Applicable*, or *Administrative (50/50)*.

NOTE: "Applicable" signifies that the Child's Title IV-E and TANF eligibility affect the selection of the OCA for this service, "Not Applicable" signifies that the Child's Title IV-E and TANF eligibility does not affect the selection of the OCA for this service, and Administrative 50/50 signifies that the selection of the OCA is based on the Service.

8. In the **License Type Required** drop down, select the type of license required for the provider.

9. Select the applicable checkbox(es):

   a. Select the **Payments Allowed** checkbox to indicate payments for the specific service are allowed.

NOTE: When the Payments Allowed checkbox is selected, all disabled checkboxes in the Payments group box are enabled. If Payments allowed is unselected, only the Payments Allowed and Ongoing Service/Placement checkboxes are enabled.

b. Select the **Ongoing Service/ Placement** checkbox to indicate payments are ongoing for the specified service or placement.

c. Select the **Amount Auto Calculated** checkbox to indicate the payment amount for the specific service is automatically calculated by the system.

d. Select the **Service Spans Multiple Days** checkbox to indicate the specific service may span more than one day. This checkbox is enabled by selecting Payment Allowed.

e. Select the **Episode Driven Payment** checkbox to indicate the payment for the specific service type is an Episode Driven Payment.

f. Select the **Unit Type** checkbox to indicate that the unit field on the Payment Request page will be enabled for the service in order to determine the payment amount. (See the FM01: Payment Processing Topic Paper for more details.)

g. Select the **Fixed Priced** checkbox to specify that the selected service is a fixed price service.

NOTE: The fixed priced checkbox enables the Contract Capacity and Over Capacity Rate on the Provider Rate page.

h. Select the **Full Month** checkbox to specify that the payment to the provider should be for the Full Month, not prorated for the days the service is provided. If placement/service existed within that month, the entire month will be paid.

i. Select the **Advance** checkbox to specify that the payment is an Advance payment for services.

j. Select the **Negative Payment Allowed** checkbox to specify that a user can select whether the service type should allow a negative payment on the Overpayment Request page.

10. From the **Reporting Category** drop down, select a value for the reporting category.

11. Select the **Multiple Allowed** checkbox if this service type can have multiple rate categories.

12. From the **Statewide Reporting** drop down, select a Statewide Reporting Group value.

13. From the **NYTD** drop down, select a value.

NOTE: A value of Not Applicable is included in this drop down to designate that a service is not related to any of the identified NYTD Reporting Groups.

14. From the **Spending Limit** drop down, select *Child Based* or *Provider Based*.

15. Enter a numeric amount in the **Limit Amount** field.

16. From the **Period** drop down, select a value.

17. From the **Approva**l drop down, select a value.

18. Select the **Rate by Service** radio button if the rate is determined by type of service.

19. Select the **Rate by Provider** radio button if the rate is determined by the type of provider.

20. Select the **Rate by Child Allowed** checkbox if applicable.

21. On the **Service Type** page within the **Service Rates** group box, click the **Insert** Button.

22. In the **Effective Date** field, enter the effective date (00/00/0000).

23. From the **Rate Period** drop down, select *Daily* or *Monthly*.

24. In the **Rate** field, enter the dollar amount of the rate.

NOTE: You may insert multiple rows in the Service Rate group box.

25. To delete a row in the **Service Rate** group box, click the **Delete** hyperlink next to the row you want to delete. .

To maintain Multiple Rate Categories

1. On the **Service Type** page within the **Multiple Rate Categories** group box, click the **Insert** button.

2. From the **Reporting Category** drop down, select a reporting category.

3. In the **Rate** field, enter the dollar amount of the rate.

NOTE: You may insert multiple rows in the Multiple Rate Category group box.

4. To delete a row in the **Multiple Rate Category** group box, click the **Delete** hyperlink next to the row you want to delete.

5. Click **Save**.

6. Click **Close**.