Florida Safe Families Network

Meetings
User Guide

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</thead>
<tbody>
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</tr>
</tbody>
</table>


# Table of Contents

## About FSFN User Guide ......................................................................................... 4
- The Intended Audience ......................................................................................... 4
- Prerequisite Knowledge ......................................................................................... 4
- Related Resources ................................................................................................. 5
- Security Information .............................................................................................. 7

## Meetings Overview ............................................................................................. 6

## About the Meeting Page ....................................................................................... 7

## Create a Meeting .................................................................................................. 8

### Key Tasks ........................................................................................................... 9
- To create a Meeting from the Desktop ................................................................. 9
- To create a Meeting from an Actions pop-up page .............................................. 12
- To create a Meeting from the Case Book ............................................................ 14
- To create a Meeting Type of “Permanency Staffing” or “Other Meeting” .......... 16
- To create a Meeting Type of “Case Transfer Staffing” ........................................ 17
- To notify Meeting Participants ........................................................................... 18
- To reschedule a Meeting ...................................................................................... 20
- To cancel a Meeting ............................................................................................... 21
- To complete a Meeting ......................................................................................... 22
- To view a Meeting ................................................................................................. 24

## Privileged Consultation Meeting ........................................................................ 25

### About Privileged Consultation ........................................................................... 25

### Key Tasks ........................................................................................................... 25
- To create a Privileged Consultation ..................................................................... 25

## Images (files) Attached to Meetings ................................................................... 27

### About Images (files) Attached to Meetings ...................................................... 27

### Key Tasks ........................................................................................................... 27
- To upload an Image to the Meeting page ......................................................... 27
- To view Images attached to the Meeting page ................................................. 29
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 the children, families, and adults of Florida.

The Intended Audience

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

- Adult and Child Protective Investigators
- Hotline Criminal Investigation (CI) Unit
- Legal Workers
- Ongoing Case Managers
- Provider Management
- 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 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.
- Key tasks described in this guide start at the FSFN Desktop, Case Book, or Person Book, unless otherwise noted. If you are unfamiliar with how to navigate to these three (3) pages, see the User Guides for Multi-Topic Basics, Case Book, and Person Book.
The Search page referred to within this user guide is the Search page with four (4) tabs: Person, Case, Provider/Organization, and Worker. This Search page is commonly called the Utility Search or Navigational Search. It is accessed primarily from the Desktop by clicking Search on the Banner or Utilities menu. Other search types may be referred to as data retrieval searches. These searches use different search functionality than the Utility Search. For example, the Person Search page provides a method to search for a person and retrieve person data that pre-fills into the page in which you are working. The Person Search page should not be confused with the Search page with the Person tab.

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)
Meetings Overview

The Meeting page provides you with the ability to schedule a meeting, notify intended participants, and formally document meeting outcomes in Florida Safe Families Network (FSFN).

The scheduling, rescheduling, cancellation of a meeting, and preparation of meeting notifications are events that are processed through the Meeting page. Microsoft Word documents are linked to each meeting allowing you to document meeting activities and outcomes.

Meetings are organized by key types:

- Administrative
- Adoption
- Legal
- Education
- Placement
- Planning

The FSFN Meeting functionality helps you coordinate other meetings associated with a case, case participant, or a provider.

The Meeting page maintains documentation of meeting proceedings by providing you with a blank Microsoft Word document to complete in preparation of or during the meeting. FSFN provides the ability to designate a meeting lead and capture and review recommendations and action items arising from meeting discussions.

Using templates, the Meeting page functionality guides you through the preparation of meeting result summaries, according to standard formats. In addition, the information captured on the Meeting page enables you to track the time frames associated with meeting requests and notifications. This information is documented on the Meeting page and available for viewing to assure compliance with regulations concerning the timeliness of scheduling.
About the Meeting Page

The Meeting page’s functionality helps you by:

- Providing the ability to document more complete meeting details
- Accessing all options, which display in the Actions and Text List Box on the right side of the page
- Allowing you to attach one or more Images to the Meeting page; for example, you may want to attach documentation of Case Transfer Staffing or Safety Management Staffing.

There are two (2) tabs on this page. These two (2) tabs allow you to:

- Define the time and place of the meeting
- Notify intended participants of the meeting's schedule and purpose
- Reschedule or cancel a meeting
- Prepare a document using Microsoft Word of the meeting's discussion or decisions
- Distribute electronic mail or hard copies of the documentation completed in preparation for the meeting

The Document tab allows you to establish the basic identifying information about a specific meeting. You enter the date, time, and location of the meeting in the appropriate fields in the Meeting Session Details group box. This information pre-fills in the related meeting notice. The case and participants selected on the Create Case Work page pre-fill as the Subject and Subject Participant respectively.

The Meeting Participants tab allows you to notify identified individuals that a meeting has been scheduled, rescheduled, or canceled with the appropriate meeting notice for each invitee. This feature supports the invitation of meeting participants and the formal notification of administrators and managers who should be routinely informed when certain meetings are scheduled. Finally, the Meeting Participants tab provides a mechanism to document detailed meeting information in a blank Microsoft Word document.

Meeting actions and information display under the Meeting icon of either the Case or the Provider expando on the Outliner, as well as, in the Case Book or Person Book.

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 launch the Privileged Consultation page from the Meeting page, you cannot access that page.
Create a Meeting

There are several ways to create a meeting in FSFN. For example, a meeting can be created from the Desktop, Case Book, or Actions pop-up page.

A meeting can be created from the Desktop by selecting Case Work on the FSFN Banner or the Create menu.

You can access the Actions pop-up page from the Case Name in the Participant view by selecting the Actions hyperlink next to the case participant name. From the Select Action group box, select Create Meeting and click the Continue button.

Alternatively, you can conduct a navigational search for a case or a provider. To do so, select the Actions hyperlink next to the name of the case or provider, and select Create Meeting to open the Meeting page. Using this method, the Subject field is pre-filled with the name of the highlighted case name or provider name, and the Meeting Lead field is pre-filled with the name of the person creating the meeting. The user then chooses the meeting type from the Meeting Type drop down field. In addition, a meeting can be created in the Participant view by selecting the Actions hyperlink next to the case participant name.

In create or edit mode, you may change the person identified as the Meeting Lead by clicking on the Worker Search hyperlink. This opens the Worker Search page, through which any worker’s name can be identified and used to populate the Meeting Lead field on the Meeting page.
Key Tasks

To create a Meeting from the Desktop

1. On the FSFN Banner, click Case Work.
   
   OR

1. From the Create menu, click Case Work.

2. The Create Case Work page displays.

3. From the Meeting drop down, select a Meeting option.

4. In the Cases group box, select the appropriate case.

5. In the Case Participants group box, select the appropriate participant(s), if applicable.

   Note: Select multiple participants by holding down the 'Ctrl' key.

6. Click Create.
7. The **Meeting** page displays.

   **Note** The Meeting Type, Case, and the Case Participants from the Create Case Work page pre-fill into the Meeting page Header group box and is disabled.

8. On the **Document** tab, enter the following in the **Meeting Session Details** group box:
   - Scheduled Date
   - Start Time
   - End Time
   - Location

   **Note** To schedule multiple meetings, click the Insert button in the Meeting Session Details group box and enter new information for a meeting.

9. In the **Meeting Issues/Statement** group box, enter the reason for the meeting.

10. To add the person who is requesting the meeting, in the **Meeting Request Details** group box, click the **Person** hyperlink.

11. Perform a person search on the **Person Search** page.

12. The Person selected receives a meeting notification.

13. In the **Meeting Request Details** group box, click the **Case Participant** hyperlink.
14. The Case Participants and Collaterals pop-up page displays.

**Note** You can access the Case Participants and Collaterals pop-up page two (2) ways: by clicking on the Case Participant hyperlink on the Document tab or the Insert button on the Meeting Participants tab.

**Note** When accessed from the Document tab, you can select the appropriate participant or collateral using the radio button and click the Continue button for insertion into the Meeting Request Details group box on the Document tab. When accessed from the Meeting Participants tab, the selected participant(s) or collateral(s) from the page populates the FSFN Participants group box on the Meeting Participants tab.

15. On the **Case Participants and Collaterals** pop-up page, select the appropriate case participant.

16. Click **Continue**.

17. You are returned to the **Meeting** page.

18. Your meeting is scheduled.

19. Notify participants. (See the **Notify Meeting Participants** section for more information.)

20. Click **Save**.

21. Click **Close**.
To create a Meeting from an Actions pop-up page

Two Actions pop-up pages, both of which are on the Desktop, allow you to create meetings. One Action pop-up page is accessed on the Case Name row; the other Action pop-up page is located on the Participant Name row in the Participant View.

1. From the Desktop, click the Cases expando.
2. On the Case Name hyperlink row, click the Actions hyperlink.
   OR
2. On the Participant Name hyperlink row (Desktop [in Participant View]), click the Actions hyperlink.
3. The **Actions** pop-up page displays.

4. Select the **Create Meeting** radio button.

5. Click **Continue**.

6. The **Meeting** page displays.

7. Complete the **Meeting** page as described in the *Create a Meeting from the Desktop* section.
To create a Meeting from the Case Book

1. At the top of the Case Book, click the Create Case Work hyperlink.

2. The Create Case Work page displays.

3. In the Case Work Items group box, select the appropriate Meeting Type from the Meeting drop down.

4. Only the case from the Case Book displays in the Cases group box.

5. In the Case Participants group box, select the appropriate participant(s), if applicable.

6. Click Create.
7. The **Meeting** page displays.

8. Complete the **Meeting** page as described in the *Create a Meeting from the Desktop* section.
To create a Meeting Type of “Permanency Staffing” or “Other Meeting”

1. From the Create Case Work page, select Permanency Staffing or Other Meeting from the Meeting drop down.
2. Select a case and case participant.
3. Click Create.
4. The Meeting page displays.
5. In the Meeting Session Details group box, complete the following fields, as appropriate:
   - Review Date
   - Person Requesting Change
   - Filing New Plan with Court
   - Check if the recommendation different from the child’s current goal. If yes, describe below. (associated text field)
6. Complete the Meeting page as described in the Create a Meeting from the Desktop section.
To create a Meeting Type of “Case Transfer Staffing”

1. From the Create Case Work page, select Case Transfer Staffing from the Meeting drop down.
2. Select a case and case participant.
3. Click Create.
4. The Meeting page displays.
5. Complete the following fields in the Case Transfer Staffing Acceptance group box:
   - Date Accepted
   - Time Accepted with AM/PM designation
   - The case worker uses these fields to document the date and time that the Ongoing Services Unit accepted the Case Transfer Staffing packet and took responsibility for the case.
6. Complete the Meeting page as described in the Create a Meeting from the Desktop section.
To notify Meeting Participants

1. On the Meeting page, in the Text List Box, click the Notify hyperlink.


3. Click Close and Return to FSFN on each template launched.
4. You are returned to the Meeting page.

5. In the FSFN Participants group box, select the Notified check box for the participants.

6. Click Save.

7. Click Close.

8. You are returned to the Desktop.

Note: Clicking the Notify hyperlink in the Text List Box launches a Word document. The meeting type selected from the Notice Type drop down determines the type of notification.

Note: FSFN Automated Messaging sends electronic mail messages to FSFN users listed as participants in the meeting, informing them of the meeting date, time, place, type, and subject. The person creating the meeting does not receive an Automated Message.
To reschedule a Meeting

1. Access the Meeting page.
2. Click the Meeting Participants tab.
3. From the Notice Type drop down, select Reschedule.
4. From the Text List Box, click the Notify hyperlink.

5. The Reschedule template displays.
6. Click Close and Return to FSFN.
7. You are returned to the Meeting page.
8. In the FSFN Participants group box, select the Notified check box for the participants.
9. Click Save.
10. Click Close
11. The Meeting has been rescheduled.
12. You are returned to the Desktop.
To cancel a Meeting

1. Access the Meeting page.

2. In the Header group box, select the Cancel Meeting check box.

3. From the Text List Box, click the Notify hyperlink.

4. The Notice of Cancellation template displays.

5. Click Close and Return to FSFN.

6. You are returned to the Meeting page.

7. Within the Meeting Participant tab’s FSFN Participants group box, select the Notified check box for the participants.

8. Click Save.

9. Click Close.

10. The Meeting is cancelled.

11. You are returned to the Desktop.
To complete a Meeting

1. Access the Meeting page.

2. In the Header group box, select the Meeting Complete check box.

3. From the Text List Box, click the Text hyperlink.

4. Enter a narrative in the Text template.

5. Click Close and Return to FSFN.

6. You are returned to the Meeting page.
7. On the Meeting Participant tab, FSFN Participants group box, select the Attended check box for the participants.

8. Click Save.

9. Click Close.

10. The Meeting is completed.

11. You are returned to the Desktop.

Note: Selecting the Meeting Completed check box disables the Cancel Meeting check box and freezes the page upon clicking the Save button.
To view a Meeting

1. On the Case Book, select Meetings from the center drop down.

   OR

1. On the Person Book, select Meetings from the center drop down.

2. All meetings display.

3. Click a meeting hyperlink.

4. The Meeting page displays with the meeting information.

   Note: Meetings can also be viewed from a case or participant search.
Privileged Consultation Meeting

About Privileged Consultation
You can launch the Privileged Consultation page from the Meeting page if you have the appropriate security. The Privileged Consultation hyperlink displays in the Text List Box when the Meeting Type is “Legal Consultation” or “Legal Meeting”. The Reason for Consultation drop down on the Privileged Consultation page is required. The two (2) values for the Reason for Consultation are:

- Attorney Client / CLS - DCF
- Attorney – Work Product

The Privileged Consultation page contains two (2) narrative fields for you to record Action Items Generated and Decisions Made.

Key Tasks

To create a Privileged Consultation

1. From the Meeting page, select Legal Consultation or Legal Meeting from the Type drop down.
2. Complete all the required fields on the Document tab.
3. Click Save.
4. Click the Privileged Consultation hyperlink in the Text List Box.
5. The **Privileged Consultation** pop-up page displays.

6. Select a value from the **Reason for Consultation** drop down.

7. Enter text in the **Action Items Generated** and **Decisions Made** narrative text boxes if appropriate.

8. Click **Save**.

9. Click **Close**.

10. You are returned to the **Meeting** page.
Images (files) Attached to Meetings

About Images (files) Attached to Meetings

If you have authorization to create a Meeting page, you can create an Imaging page that is attached to the Meeting page. You do not need to be assigned to the case to create a Meeting page. Additionally, if you are the supervisor of the user that created the Meeting page, you can also attach an image to the meeting as well.

You can view Imaging pages that are attached to a meeting on the Meeting page. From the Actions List Box, the View Attached Images hyperlink launches the Image History pop-up page. All images attached to the meeting are viewable.

Key Tasks

To upload an Image to the Meeting page

1. From the Meeting page, click the Upload Image hyperlink in the Actions List Box.
2. The **Imaging** page displays.

   **Note** The Image Category and Image Type fields default to Meetings. The image is attached to this piece of work. Once the image is uploaded, the View Attached Image hyperlink displays in the Actions List Box.

3. Enter the Date Document Scanned.


5. Upload the image.

   **Note** The Image file must be of one of the following formats: “.doc, .pdf, .rtf, .xls, bmp, or .jpg”.

6. Click **Save**.

7. Click **Close**.
To view images attached to the Meeting page

1. From the Person Book or Case Book, select Meetings from the center drop down.
2. All meetings display.
3. Click a meeting hyperlink.
4. The Meeting page displays with the meeting information.
5. From the Actions List Box, click the View Attached Image hyperlink.
8. The **Image History** page displays a **View** hyperlink to each of the associated **Imaging** pages.

9. Click the applicable **View** hyperlink.

10. The **Imaging** page displays.

11. Click **Close**.

12. You are returned to the **Image History** page.

13. Click **Close**.

14. You are returned to the **Meeting** page.