Meetings
How Do I … Guide

June 27, 2013

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 and companion document to other supporting resources such as, User Guides and Online Help. Visit the DCF FSFN Website (http://fsfn.dcf.state.fl.us) for additional resources.

How Do I…

Create a Meeting

How Do I…?	Selections	Tips & Guidelines
Create a Meeting from Desktop or Case Book	• From Desktop, click **Case Work** on Banner or **Create** menu and **Case Work**. *OR* • From Case Book, click **Create Case Work**. • On **Create Case Work** page, select a meeting type from **Meeting** drop down. • Select a **Case** and **Case Participant**. • Click **Create**. • From **Meeting** page, on **Document** tab, in **Meeting Session Details** group box enter the following: - **Scheduled Date** - **Start Time** - **End Time** • In **Meeting Issues/Statement** group box, enter reason for meeting. • In **Meeting Request Details**, click **Person** hyperlink. • From **Person Search** page, in **Last Name** field, enter a last name. • Click **Search**. • Select appropriate person. • Click **Continue**. • You are returned to **Meeting** page. • In **Meeting Request Details**, click **Case Participant** hyperlink; Case **Participants and Collaterals** pop-up page displays. • Select appropriate Case Participant or Collateral. • Click **Continue**. • You are returned to **Meeting** page. • Meeting is scheduled. • Notify participants (see notify participants) • Click **Save**.	*The Meeting page provides the ability to schedule a meeting, notify intended participants, and formally document meeting outcomes in FSFN.* *The FSFN user may also use the Meeting page to coordinate other meetings associated with a case, case participant, or a provider. There are two tabs on this page:* *The meetings are listed under key meeting types:* • *Administrative* • *Adoption* • *Legal* • *Education* • *Placement* • *Planning*

Create a Meeting

How Do I…?	Selections	Tips & Guidelines
Create a Meeting from Actions pop-up page	• From Desktop, click **Cases** expando. • On **Case Name** hyperlink row, click **Actions** hyperlink. *OR* • On **Participant Name** hyperlink row (Desktop [in Participant View]), click **Actions** hyperlink; **Actions** pop-up page displays. • Select **Create Meeting** radio button. • Click **Continue**. • Complete **Meeting** page as described in *Create a Meeting from Desktop* section.	*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.*
Create a Meeting Type of "Permanency Staffing" or "Other Meeting"	• See *Create a Meeting from Actions pop-up page* section above. • In **Meetings Session Details** group box, complete following fields, if appropriate: - **Review Date** - **Person Requesting Change** - **Filing New Plan with Court** - **Check if recommendation different from child's current goal. If yes, describe below.** (associated text field) • Complete **Meeting** page.	*When meeting types of Permanency Staffing or Other Meeting is selected on the Document tab, the following fields become visible to you in the Meetings Session Details group box:* • *Review Date* • *Person Requesting Change* • *Filing New Plan with Court* • *Check if the recommendation is different from child's current goal.*

Create a Meeting		
How Do I…?	**Selections**	**Tips & Guidelines**
Create a Meeting Type of "Case Transfer Staffing"	• See *Create a Meeting from Actions pop-up page* section above. • **Case Transfer Staffing Acceptance** group box, contains the following fields: - **Date Accepted** - **Time Accepted with AM/PM designation** • Complete **Meeting** page.	*These fields allow the worker to document the date and time that the Ongoing Services Unit accepted the Case Transfer Staffing packet and took responsibility for the Case.* *The Date Accepted and Time Accepted fields are not required. However, when entered by the worker and the Case Accepted check box is selected, the page becomes frozen and a MY Task* is *generated for the Family Assessment Due Date upon save (Refer to SM06c Family Assessment topic paper for more information.).* *In the instance that the Case Transfer Staffing has been completed and case acceptance is pending, you can select the Meeting Completed check box in the header. When the Meeting Completed check box is selected and the worker clicks Save, the Meeting becomes frozen, leaving the Case Accepted check box in the header and Case Transfer Staffing Acceptance group box fields enabled.* *Once the Case Transfer Staffing is accepted, you can select the radio button for the proper, associated meeting session and enter the accepted date and time within the Case Transfer Staffing Acceptance group box.* *If you input a date and time before the selected session you will receive the following validation message: "Date/Time of Case Transfer Staffing Acceptance should not be in the past".*

Notify Meeting Participants		
How Do I…?	**Selections**	**Tips & Guidelines**
Notify Participants about a Scheduled Meeting	• From **Text** group box, click **Notify** hyperlink. • The Microsoft Word document is launched for **Notice of Schedule** template. • Click **Close and Return to FSFN** on each template launched. • You are returned to **Meeting page**. • Click **Meeting Participant** tab. • In **FSFN Participants** group box, select **Notified** check box for participants. • Click **Save**. • Click **Close**. • You are returned to Desktop.	*The Notify selection under the Text header within the Actions and Text group box launches Microsoft Word to open the template associated with the selected Notice Type.* *Automated Messaging is invoked to send 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 will not receive an Automated Message.* *The Meeting Participants tab allows you to identify individuals to be notified that a meeting has been scheduled, rescheduled, or canceled, and to select the appropriate meeting notices for each invitee.* *This feature supports the invitation of meeting participants and provides a mechanism for the documentation of "Other Participants".*

Reschedule a Meeting

How Do I…?	Selections	Tips & Guidelines
Reschedule a Meeting	• From Desktop, click **Cases** expando. • Click **Cases** icon. • Click **Meeting** icon. • Click **Meeting** hyperlink; **Meeting** page displays. • Click **Meeting Participants** tab. • From **Notice Type** field, select **Reschedule**. • In **FSFN Participants** group box, click **Person Search** to add participants, if applicable. • Click **Close**. • In **FSFN Participants** group box, click **Insert**. • Select a **Case Participant**, if applicable, and click **Continue**. • From **Text** group box, click **Notify** hyperlink. • The Microsoft Word document is launched for **Notice of Reschedule** template. • Click **Close and Return to FSFN** on each template launched. • You are returned to **Meeting** page. • Click **Meeting Participant** tab. • In **FSFN Participants** group box, select **Notified** check box for participants. • Click **Save**. • Click **Close**.	*The Meeting Participants tab allows you to identify individuals to be notified that a meeting has been rescheduled.*

Cancel a Meeting		
How Do I…?	**Selections**	**Tips & Guidelines**
Cancel a Meeting	• From Desktop, click **Cases** expando. • Click **Cases** icon. • Click **Meeting** icon. • Click a **Meeting** hyperlink. • From **Meeting** page, in **Header** group box, select **Cancel Meeting** check box. • Click **Meeting Participants** tab. • From **Notice Type** field, select **Cancel**. • From **Text** group box, click **Notify** hyperlink. • The Microsoft Word document is launched for **Notice of Cancel** template. • Click **Close and Return to FSFN** on each template launched. • You are returned to **Meeting** page. • Click **Meeting Participant** tab. • In **FSFN Participants** group box, select **Notified** check box for participants. • Click **Save**. • The **Meeting** has been cancelled.	

Complete a Meeting

How Do I…?	Selections	Tips & Guidelines
Complete a Meeting	• From Desktop, click **Cases** expando. • Click **Cases** icon. • Click **Meeting** icon. • Click a **Meeting** hyperlink; **Meeting page** displays. • In **Header** group box, select **Meeting Complete** check box. • In **Meetings Issues**/**Statements** group box, click **Insert** to document additional details regarding completion of Meeting. • Click **Meeting Participant** tab. • In **FSFN Participants** group box, select **Attended** check box for applicable participants. • Click **Save**. • The **Meeting** is completed.	*The Meeting Issues/Statements group box allows you to enter short and concise descriptions of the meeting's purpose and details of the meeting. The information specified in this field pre-fills the appropriate fields on the meeting notices.*

Create Privileged Consultation Meeting

How Do I…?	Selections	Tips & Guidelines
Create Privileged Consultation Meeting	• From **Meeting** page, select ***Legal Consultation*** or ***Legal Meeting*** from **Type** drop down. • Document all required fields on **Document** tab. • Click **Save**. • In **Actions** group box, click **Privileged Consultation** hyperlink. • From **Privileged Consultation** pop-up page, select value from **Reason for Consultation** drop down. • Type text in **Action Items Generated** and **Decisions Made** narrative text boxes, if appropriate. • Click **Save**. • Click **Close**.	*Only authorized users are able to launch the Privileged Consultation page from the Meeting page. The Privileged Consultation hyperlink only displays in the Actions List Box when the Type is "Legal Consultation" or "Legal Meeting". The Reason for Consultation drop down on the Privileged Consultation page is required. The only two (2) values within the Reason for Consultation are:* • *Attorney Client / CLS - DCF* • *Attorney - Work Product* *The Privileged Consultation page also contains two narrative fields for the user to record Action Items Generated and Decisions Made.*

Attach Images to a Meeting		
How Do I…?	**Selections**	**Tips & Guidelines**
Upload an Image	• From **Desktop** menu bar, click **Create**. • Click **Case Work**. • From **Meeting** drop down, select a **Meeting** option. • Select a **Case** and **Case Participant** and click **Create**. • On **Meeting** page, document all required fields. • Click **Save**. • From **Actions** group box, click **Upload Image** hyperlink. • On **Image** page, enter **Date Document Scanned**. • Search and select an acceptable image to upload. • Enter **Comments**, if applicable. • Click **Save**. • Click **Close**.	*The Upload Image hyperlink only displays once the Meeting page is saved successfully for the first time.* *Multiple Images can be uploaded to a single Meeting page.* *Each time the Upload Image hyperlink is clicked, a new Image uploads and attaches to the Meeting page.* *When an Image is uploaded to the Meeting page both the Image Category and Image Type fields default to "Meeting" and are disabled.*

View a Meeting		
How Do I…?	**Selections**	**Tips & Guidelines**
View a Meeting	• On Case Book, select ***Meetings*** from center drop down. *OR* • On Person Book, select ***Meetings*** from center drop down. • All meetings display. • Click a **Meeting** hyperlink. • The **Meeting** page displays with meeting information.	*Meetings can also be viewed from a case or participant search.*
View a Meeting from Utility Search or Search Icon	• From Desktop, click **Search** icon. • From **Search** page, click **Person** tab. • Enter search criteria. • From **Persons Returned** group box, click **Person** icon. • Click **Case Folder** icon. • Select applicable **Meeting** and click hyperlink.	*If the Meeting icon is displayed, you can access the Meeting page from within any tab on the Search page in any returned search results under the Case Folder icon.* *When accessing the Meeting page from a Utility Search it is in view-only mode.*

View an Attached Image

How Do I…?	Selections	Tips & Guidelines
View Attached Images	• From Desktop, click **Cases** expando. • Click **Cases** icon. • Click **Meeting** icon. • Click a **Meeting** hyperlink. • From **Meeting** page, in **Actions** group box, click **View Attached Images** hyperlink. • The **View Image History** page displays a **View** hyperlink to each associated Imaging pages. • Click applicable **View** hyperlink.	*The View Attached Images hyperlink displays after at least one (1) Imaging page is created in association with the Meeting page.* *If the Image Category is Medical Mental Health, the Imaging page will not display on the Image History page.*

Access Meetings

How Do I…?	Selections	Tips & Guidelines
Access a Meeting from Case Book	• From Desktop, click **Cases** expando. • Click **Case Book** hyperlink; **Case Book** page displays. • From **Case Book**, select ***Meetings*** from center panel drop down. • All **Meetings** display. • Click applicable **Meetings** hyperlink; **Meeting** page displays. • Click **Close**. • You are returned to **Case Book** page.	*You can access and edit a meeting from Case Book using the center panel drop down.*

Access Meetings		
How Do I…?	**Selections**	**Tips & Guidelines**
Access a Meeting from Person Book	• From Desktop, select **Participant View** check box. • Click **Cases** expando. • Click **Case Folder** icon. • Click applicable **Person Book** hyperlink. • From **Person Book**, select ***Meetings*** from center panel dropdown. • All **Meetings** display. • Click applicable **Meetings** hyperlink; **Meeting** page displays. • Click **Close**.	*A meeting can be accessed from Person Book by selecting Meetings from the center panel drop down.*
Access a Meeting from Desktop	• From Desktop **Cases** expando, click **Case Folder** icon. • Click **Meeting** icon • Select and click applicable **Meeting** hyperlink; **Meeting** page displays.	*You can access the Meeting page from within any Desktop expando under the Case Folder icon if the Meetings icon is displayed.*