Florida Safe Families Network

Multi Topic Basics
How Do I … Guide

May 12, 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 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…

Log In and Log Out of FSFN

How Do I…?	Selections	Tips & Guidelines
Log in to FSFN	Launch FSFN web browser. • On **FSFN Login** page, type your **Username** and **Password**. • Click **Submit**. • The **Worker Unit Assignment Selection** page displays.	*Clicking the Clear button removes information from the Username and Password text boxes.* *Clicking the Close button exits FSFN.*
Select a Login Profile	• Select a **Worker Unit Assignment** from **Select Login Profile** drop down. • Click **Continue**.	*The Worker Unit Assignment Selection page allows workers who have multiple work roles to select a unit assignment.* *When a worker selects a specific unit assignment, the system provides the job class and security profile associated with the selected Worker Unit Assignment.*
Log out of FSFN	• Click **Logout** on **FSFN Banner** to close FSFN. • Navigation warning displays. • Click **Yes**, **No**, or **Cancel**.	*Worker must validate that the action is correct.* *Message to worker “Are you sure you want to log out?”* *Click Yes to continue, or No or Cancel to stay on current page.*

FSFN Banner Bar Highlights

How Do I…?	Selections	Tips & Guidelines
Create Financial Work	Click **Financial Work**.	*This shortcut is used to quickly access frequently used financial work.*
Create Case Work	Click **Case Work**.	*This shortcut is used as an alternative to Create > Case Work from the menu.*
Create Provider Work	Click **Provider Work**.	*This shortcut is used as an alternative to Create > Provider Work from the menu.*

FSFN Banner Bar Highlights

How Do I…?	Selections		Tips & Guidelines
Search for Case, Person, Provider, or Worker		Click **Search**.	*This shortcut is used as an alternative to Utilities > Search from the menu.*
Refresh The Desktop		Click **Refresh**.	*This option resets the Desktop to display newly created/assigned work.*
Print a Page		Click **Print Screen**.	*The Print button only prints the active FSFN page.* *The print function prints all expanded areas on the page.* *If you want to see and print less information, you must open fewer expandos.* *If you want to see and print more information, you must open more expandos before clicking Print.*
View On-Line Help		Click **Help**.	*This option displays the help topic for the active page.*
Error Log		Click **Error Log**.	*Displays validation errors on the active page.*
View Audit Information		Click **Audit**.	*Clicking Audit launches the Audit page detailing the workers who have accessed this page.*
Exit FSFN		Click **Logout**.	*To exit FSFN, use Logout instead of the Windows "X" Close option on the upper right of your page.*

FSFN Menu Highlights

How Do I…?	Selections	Tips & Guidelines
Create Menu	• Click **Create**. • Select a task to create in FSFN.	*The following options are found on the Create menu:* • *Case Work* • *Provider Work* • *Hotline Intake: Child Intake* • *Hotline Intake: Adult Intake* • *Hotline Intake: Special Conditions* • *Service Referral* • *Information and Referral* • *Provider Inquiry: Person* • *Provider: Person Provider Inquiry* • *Provider Inquiry: Organization* • *Recruitment Event* • *Worker Training: Create/View/Maintain Training Courses* • *Worker Training: Trainee Management* • *Worker Training: Individual Worker Training*
Maintain Menu	• Click **Maintain**. • Select a task to maintain in FSFN.	*The following options are found on the Maintain menu:* • *Checklist Template* • *Messages and Links: System Wide* • *Messages and Links: Unit* • *Manual Tasks Due* • *Recruitment Event* • *Security: Security Profiles* • *Security: User Groups* • *Organization: Worker* • *Organization: Unit* • *Organization: Agency* • *Organization: Agency Contracts* • *Basic Subsidy Rate Maintenance*

FSFN Menu Highlights

How Do I…?	Selections	Tips & Guidelines
Utilities Menu	• Click **Utilities**. • Perform a variety of tasks in FSFN.	*The following options are found on the Utilities menu:* • *AFCARS* • *AFCARS/NYTD Footnotes* • *Approval Management* • *Assignment Management* • *Background Listing* • *Call Record Search* • *Case Transfer Request* • *Command Center Queue* • *Counselor Productivity Report* • *Delete Person* • *Financial Activity* • *FPL Maintenance Page* • *Hotline* • *Interstate Compact System* • *Investigation/Special Conditions Referral Workload* • *Judicial Group Management* • *Legal Record Search* • *On Call Schedule Maintain* • *On Call Schedule View* • *Pending Provider Delete* • *Person Merge* • *Placement Correction* • *Provider Delete* • *Provider Merge* • *Receiving Unit List: Child Intakes* • *Receiving Unit List: Adults* • *Reporter Search* • *Reporting* • *Search* • *Tasks Due Management* • *Worker Transaction Search*

Keyboard Shortcuts

How Do I…?	Selections	Tips & Guidelines
Copy Text	• In relevant text box, highlight text using your mouse. • Hold down **Ctrl** and **C** keys on keyboard.	*You may also copy text from word processing documents to FSFN using these steps.*
Paste Text	• In destination text box, place your cursor in box by single clicking. • Hold down **Ctrl** and **V** keys on keyboard.	*You may also paste most text from FSFN into word processing documents using these steps.*
Print Page	• On **Banner**, click **Print** or hold down **Ctrl** and **P** keys on keyboard.	*The Print button only prints the active FSFN page.* *The print function prints all expanded areas on the page.* *If you want to see and print less information, you must open fewer expandos.* *If you want to see and print more information, you must open more expandos before clicking Print.*
FSFN Logoff	• On **Banner**, click **Logout** or hold down **Alt** and **F4** keys on keyboard.	*This action logs you out of FSFN.*
Move to Next Field	• Place your cursor in a field on page. • Press **TAB.**	*This places your cursor in the next available field.*
Move to Previous Field	• Place your cursor in a field on page. • Hold down **Shift** key and press **TAB.**	*This places your cursor in the previous available field.*
Select a Check Box	• Press **TAB** to navigate to correct check box, and then press **Space Bar** to select desired value. • Press **TAB** to move to next field.	*This selects a check box.*

FSFN Menu Highlights

How Do I…?	Selections	Tips & Guidelines
Select Values From Drop downs	• To highlight a value from a long drop down list, press first letter of your desired value. • If desired value is further down list, press letter on keyboard again or use **down** arrow. Repeat until you have highlighted your desired value.	*If the desired value is further down the list, you can also use the Down arrow. Press the Down arrow until you have highlighted your desired value.*
Select Buttons or Tabs	• Press and hold the **Alt** key and the key that matches the underlined letter of the button or tab you want to select.	*For example, since* Create *displays as "C" underlined, hold down the Alt and C keys on the keyboard.*
Switch From FSFN to Other Application	• Hold down **Alt** and **TAB** keys. A menu of open applications displays from which you can choose. • While holding down **Alt** key, continue to click **TAB** until you have page you want to display.	*This allows you to have multiple pages open, and allows you to quickly toggle between application/pages.*

FSFN Desktop Highlights

How Do I…?	Selections	Tips & Guidelines
Change Outliner to Participant View	• On Desktop, select **Participant View** check box.	*This allows you to view all the information in the Outliner by participant.*
Change Outliner to Unrestricted View	• On Desktop, clear **Date Restricted** check box.	*Clearing the Date Restricted view displays complete history of all work related to a case or provider.*
Expand FSFN Desktop View Collapse the FSFN Desktop View	• Click right pointing blue arrow.  • Click left pointing blue arrow. 	*This arrow hides the Messages and Hyperlinks section of the FSFN Desktop.* *If you want to restore the Messages and Hyperlinks section, click the left pointing expanded arrow in the top, right corner of the page.*

FSFN Desktop Highlights

How Do I…?	Selections	Tips & Guidelines
Open an Expando	• Click plus (+) sign next to expando name.	
Close an Expando	• Click plus (-) sign next to expando name.	

View Tasks / Manual Tasks

How Do I…?	Selections	Tips & Guidelines
View All Tasks Using the My Tasks Calendar Expando	• Log in to FSFN. • **My Task Calendar** expando automatically expands on FSFN Desktop. • All worker tasks display.	
View Currently/Past Due Tasks	• View **Currently/Past Due** group box for a list of tasks. • **Task Due Name**, **Date Due**, **ID Number**, and **Worker Profile** display. • Click a **Task Due Name** hyperlink. • The page associated with task displays.	*The Currently/Past Due group box pre-fills with all current and past tasks due across all of the worker's profiles.* *Each task due identifies the worker's profile that is associated with the task.* *A hyperlink launches the piece of work associated with tasks belonging to the worker's profile currently used to log in to FSFN.* *Tasks belonging to the worker's other profiles display as plain text.* *If the task is past due, it displays in red font with an exclamation point at the end of the task line.*
View Due in the Future Tasks	• View **Due in the Future** group box for list of tasks. • **Task Due Name**, **Date Due**, **ID Number**, and **Worker Profile** display. • Click a **Task Due Name** hyperlink. • The page associated with task displays.	*Pre-fills with all Due in the Future tasks across all worker profiles.* *A hyperlink launches the piece of work associated with tasks belonging to the worker profile currently logged in to FSFN.* *Tasks belonging to other worker profiles do not displays as hyperlinks.*

View Tasks / Manual Tasks

View Manual Tasks	• View **Manual Tasks** group box for a list of tasks. • **Task Due Name**, **Date Due**, **ID Number**, and **Worker Profile** display. • Click a **Task Due Name** hyperlink. • The page associated with task displays.	*Pre-fills with all Manual Tasks across all worker profiles.* *A hyperlink launches the piece of work associated with tasks belonging to the worker profile currently logged in to FSFN.* *Tasks belonging to other worker profiles do not displays as hyperlinks.* *If the task is past due, it displays in red font with an exclamation point at the end of the Tasks Due line.*
View Past Due Worker Tasks	• View **Past Due Worker** group box for a list of tasks. • **Task Due Name**, **Date Due**, **ID Number**, and **Worker Profile** display.	*This group box only displays when logged in with a supervisor profile.* *Only those tasks for the currently logged in profile in their Parent Unit pre-fill the Past Due Worker group box.* *Tasks belonging to other worker profiles do not displays as hyperlinks.*
View Past Due Worker Tasks	• View **Past Due Worker** group box for a list of tasks. • **Task Due Name**, **Date Due**, **ID Number**, and **Worker Profile** display.	*This group box only displays when logged in with a supervisor profile.* *Only those tasks for the currently logged in profile in their Parent Unit pre-fill the Past Due Worker group box.* *Tasks belonging to other worker profiles do not displays as hyperlinks.*

View Tasks / Manual Tasks		
Create, Complete, and Delete a Manual Task	• From Desktop **Maintain** menu, click **Manual Tasks Due**. • On **Manual Tasks Due** page, click **Insert**. • Enter the following in the new row: – **Start Date** – **End Date** – **Message** • Click **Save**, then click **Close**. • Select **Complete** check box to complete an existing manual task. • Click **Delete** hyperlink to delete an existing manual task. • Follow prompts to complete deletion.	*If you previously created manual tasks, these tasks display upon launching the Manual Tasks page. If no manual tasks exist, this page is blank.* *Manual Tasks are not created, updated, or deleted by FSFN processes.* *The electronic notifications of tasks are personal tasks created by workers and cannot be viewed by other workers.* *Upon creating a Manual Task, the End Date field is required.*
View Tasks for a Case or Provider	• On Desktop, click **Cases** or **Providers** expando. • Click **Actions** hyperlink next to applicable **Case** or **Provider**. • Select **View Tasks Due** radio button. • Click **Continue**.	*The View Tasks Due page allows you to view all tasks and the worker assigned to the task for a Case or Provider.*

Create / View Notes

How Do I…?	Selections	Tips & Guidelines
Create a Note from the Create Case Work Page	• From Desktop menu, click **Create**. • Click on **Case Work** or **Provider Work**. • Select a subject from **Narrative** drop down, a **Case or Provider**, and **Case/Participant**. • Click **Create**; **Case Note** page displays. *OR* • Click **Cases** expando. • Click **Actions** hyperlink. • Select **Create Case Note**. • Click **Continue**; **Case Note** page displays.	*Only the worker who created the note and has an assignment to the Case or Provider can update a Case Note or Provider Note.* *The worker's supervisor can update a Case Note or Provider Note.* *Use the spell check feature on the Banner to spell check the note before the note is finalized.*
Create a Note from the Case Book Page	• Next to applicable **Case** icon, click **Case Book** hyperlink. • On **Case Book** page, click **Create Case Work** hyperlink. • The **Create Case Work** page displays. • Select a subject from **Narrative** drop down, a **Case**, and **Case/Participant(s)**. • Click **Create**. • The **Case Note** page displays.	*In some scenarios, you are not able to select Case Participants and the system defaults to all Participants selected.*
Create a Note On Case or Provider Not Assigned to You	• On Banner, click **Search**. • From **Search** page, click **Case** or **Provider/Organization** tab. • Type applicable data/values. • Click **Search**. • Click **Actions** hyperlink for relevant case or provider. • Select **Create Case Note** radio button. • Click **Continue**; **Case Note** page displays.	*Notes are one exception in FSFN where you can type information on a Case or Provider that is not assigned to you.* *To create a Case Note or Provider Note, the worker is not required to have an assignment to the case or provider.*

Create / View Notes		
View a Note for a Case or Provider	• From Desktop, click **Actions** hyperlink next to relevant case or provider. • On **Actions** pop-up page, select **Case** or **Provider Note Criteria Search** radio button. • Click **Continue**. • Select available search criteria on **Case Note Search Criteria** page. • Click on applicable **Category** and **Type Criteria**. • Hold down '**Ctrl**' key to make multiple selections in a field. • Click **Add** or **Add All**. • Select relevant participants to display in **Case Participants** field. • Click **Search**. • Click **View** hyperlink and **Case Notes** for selected participant displays.	*Once the Case Note Search Results page displays, you can click the Print hyperlink to print searched notes for a Case or Provider.* *The Types field is populated based on the Category field selection.* *If the Validation Errors dialog box displays "No records were found that match the criteria," click Close to return to the Case Note Search Criteria page.* *If the search is successful, the Case Note Search Results page displays returned results.*
View all Notes for a Case or Provider from the FSFN Desktop	• On Desktop, expand **Cases** or **Providers** expando. • Click a **Case Folder** icon or **Provider** icon. • Click **Narrative** icon. • All case note types display under **Narrative** icon.	
Print a Specific Note	• On Desktop, expand **Cases** expando. • Click a **Case Folder** icon. • Click **Narrative** icon. • Click a **Case Note** hyperlink. • From **Case Note** page, in **Actions** group box, select **View Note** or **View History**. • Click **Go**. • The note is launched in a separate Microsoft Word document and can be viewed and printed.	*Provider Notes are viewed or printed by accessing the Provider Note page.*

Create / View Notes

View a Note from Case Book	• On Desktop, expand **Case** expando. • Click **Case Book** hyperlink; Case **Book** page displays. • Case notes are displayed in center group box. • Click a **Case Note** hyperlink; **Case Notes** page displays.	

View / Create Case and Case Work

How Do I…?	Selections	Tips & Guidelines
View a Note from Person Book	• On Desktop, select **Participant View** check box. • Next to applicable **Participant** icon, click **Person Book** hyperlink. • Case Notes are displayed in center group box. • Click a **Case Note** hyperlink; **Case Notes** page displays.	
View a Case and Work Within a Case	• Click **Case** expando. • Click **Case Folder**. • Click icon for the piece of work for review. • Click applicable data within work.	
View a Case on the Case Book Page	• On Desktop, click **Cases** expando. • Click **Case Folder**. • Click **Case Book** hyperlink; **Case Book** page displays.	

View / Create Case and Case Work		
View/Update a Participant Within a Case	• On Desktop, select **Participant View** check box. • Click **Case** expando. • Click **Case Folder** icon. • Click **Participant** hyperlink or **Person Book** hyperlink.	
View a Person Details On the Person Book Page	• On Desktop, select **Participant View** check box. • Click **Case** expando. • Click **Case Folder** icon. • Click **Person Book** hyperlink.	
Create Case Work	• From Desktop menu, click **Create**. • Select **Case Work**. • From **Create Case Item** drop down, select applicable subject. • Select relevant item. • Select Case and Participant(s). • Click **Create**.	*Case work in FSFN is security controlled and therefore you are only able to access information within your security profile.* *Additional case work can be found on the Actions hyperlink next to the Case Folder.*
Create Case Work from Case Book	• On Desktop, click **Case** expando. • Click **Case Folder** icon. • Click **Case Book** hyperlink; **Case Book** page displays. • Click **Create Case Work** hyperlink; **Create Case Work** page displays.	

View / Create Provider and Provider Work

How Do I…?	Selections	Tips & Guidelines
View a Provider and Work Within a Provider	• Click **Provider** expando. • Click **Provider** icon. • Click icon for the piece of work to review.	*Providers in FSFN include individuals, homes, vendors, and out-of-state agencies.*
Create Provider Work	• From Desktop menu, click **Create**. • Select **Provider Work**. • Select relevant subject from **Create Provider Item** drop down. • Select relevant item. • Click a provider from **Provider** list. • Click **Create**.	*Additional provider work can be found on the Actions hyperlink next to the Provider.*
Update Provider Information	• Click **Provider** expando. • Click **Provider** name hyperlink.	

Save / Close / Continue Button

How Do I…?	Selections	Tips & Guidelines
Save Entered Information and Exit a Page	• Click **Save**. • Click **Close**.	*You must click Save to save your work in FSFN.* *The save has been successful when you are returned to the page with no validation error messages.* *In some scenarios, the Save button may be unavailable (disabled) when the Save is complete.*
Exit a Page Without Saving Information	• Click **Close**.	*To cancel saving the information you entered on the page, answer "No" to "Do you want to save your changes?" message.*

Save / Close / Continue Button

Make Selection and Continue to Next Page	• Click **Continue** after making an applicable selection on a page.	*The Continue button is used when the information on one page pre-fills information on the next page.*

Submit Approval Request

How Do I…?	Selections	Tips & Guidelines
View Approvals	• On Desktop, click **Approvals** expando. • Drill down within relevant subgroup. • Click applicable **Case Folder** icon. • Click relevant icon within case.	*Three subgroups exist for approvals: My approvals, Approvals in Progress, and Approval History.*

Submit Work for Supervisory Approval	• Open piece of work.
	• From **Options** drop down, select ***Approval***.
	• Click **Go**.
	• From **Approvals History** page, select one **Approval Decision** radio buttons:
	  – Select **Approve** to submit the work for supervisory approval.
	  – Select **Not Approve** to take no further action and freeze the work.
	  – Select **Reroute** to route the supervisory approval request to another supervisor.
	  – Select **Recall/Return** to return the approval request after it is submitted.
	• Click **Continue**.
	• Click **Save**.
		This allows you to view the complete approval history chain once a piece of work has received final approval.
		
		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.
		
		When selecting Reroute, the worker is instructed to click the Other hyperlink.
		
		Selecting the Other hyperlink in the Supervisor group box launches the Reroute Worker Approval page.
		
		Selecting Recall/Return sends the piece of work back to the initiating worker, who must then resubmit the approval request.

Submit Approval Request

Approve Work	• Click **Approvals** expando. • Click **My Approvals** expando. • Click **Case Folder** icon. • Click appropriate icon displayed for the work that needs to be approved. • Click **Initial** hyperlink. • The page with the piece of work requiring approval displays. • From **Options** drop down, select ***Approval***. • Click **Go**. • On **Approval History** page, select a radio button from **Approval Decision** group box. • Click **Continue**. • Click **Save**.	*The ability to approve work is associated with a security profile normally assigned to supervisors.* *If Not Approved is selected in the Approval Decision group box, the work freezes and cannot be reopened.*

View / Delink Intakes

How Do I…?	Selections	Tips & Guidelines

View an Intake	• On FSFN Desktop, select **Intakes** expando.
	• Drill down in the relevant sublevel:
	  – **My Intakes**
	  – **All Intakes**
	  – **Overdue Intakes**
	• Click **Intake** hyperlink; **Intake** page displays.
		The Intake expando lists Child Intakes, Adult Intakes, Special Conditions, Service Referrals, and Person Provider Inquiries created by the worker.
		
		All Intakes display for supervisors with the proper security.
		
		My Intakes and Overdue Intakes appear on workers and supervisors' FSFN Desktop.
		
		Overdue Intakes display in bold and red.
		
		An Intake no longer displays in the Intake expando once it has been linked to an existing Case or a new Case has been created.

View / Delink Intakes

Delink an Intake from a Case	• On Desktop, click **Cases** expando. • Click **Case Folder** icon. • Click **Intakes** icon. • Select the relevant intake to make the changes. • On **Intake** page, click **Option** drop down and select ***Delink Intake***. • Click **Go**. • Select desired intake to delink. • Click **Save**. • Click **Close**.	*You must have the proper security to perform this task.* *Intakes cannot be delinked:* • *When only one service referral exist* • *When work is completed on the investigation beyond the initial commencement process or creation of other notes*

View / Update Workers

How Do I…?	Selections	Tips & Guidelines
View Workers	• On Desktop, click **Workers** expando. • Select **Supervisor** icon.	*Available to supervisors only.* *Supervisors can view their assigned workers and the cases and providers assigned to the workers.*
View Workers' Workload	• On Desktop, click **Workers** expando. • Next to the supervisor's name, click on **Worker** icon to view assigned cases/providers.	*All cases and providers assigned to the worker display.*
Update Worker Information	• On FSFN Desktop, click the **Workers** expando. • Next to the supervisor's name, click **Worker** icon. • Click **Worker's Name** hyperlink.	

View / Update Workers

Create or Maintain an Assignment to a Worker	• On FSFN Desktop, click **Workers** expando. • Click the **Supervisor** icon. • Click **Worker** icon. • Click **Actions** hyperlink next to case name. • Select desired change. • Click **Continue.** • Select or search for worker. • Complete fields in **Assignment Definition** group box. • Select a **Current Worker Status** radio button. • Click **Assign**.	*The Current Worker Status radio button defaults to "Do Not Close," however, you can select "End Assignment" for the worker currently assigned to the case.*

Search

How Do I…?	How Do I…?	How Do I…?
Search for a Case	• On Desktop, click **Utilities** menu. • Click **Search**. • Click **Case** tab. • From **Search** page, enter (at a minimum) a **Last Name**. • Click **Search**. • Search results display at bottom of the **Search** page in **Cases**, **Persons**, **Providers,** or **Workers Returned** group box (Low to High). • The **Cases Returned** group box displays **Case Name, Actions**, and **Case Book** hyperlinks.	*You can also click the Search icon at the top of the FSFN Desktop to open the Search page.* *If needed, narrow the search by entering additional information, such as County or Case ID.* *Type the applicable search criteria (at a minimum provide data in the required blue fields).* *Setting the Search Precision to a lower setting expands the search results.* *Placing the setting at High returns results that are an exact match based on the information entered in the Last and First Name fields.*

Search		
Search for a Person	• On Desktop, click **Utilities** menu. • Click **Search**. • From **Search** page, click **Person** tab. • Enter (at a minimum) a **Last Name**. • Set **Search Precision** to the setting needed (Low to High) if entering data in the **Last Name** or **First Name** fields. • Click **Search**. • The **Persons Returned** group box displays the **Person Name** and **Person Book** hyperlinks.	*You can also click the Search icon at the top of the FSFN Desktop to open the Search page.* *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 expands the search results. Placing the setting at High returns results that are an exact match based on the information entered in the Last, First, and Street Name fields.* *The following guidelines are used when searching for a person using the SSN field.* *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 not is allowed, and numbers that are all the same, such as all 1's, 2's, and so forth.* *FSFN identifies and makes visible any duplicated social security numbers by bolding the duplicated SSN.*

Search		
Search for a Provider	• On Desktop, click **Utilities** menu. • Click **Search**. • From **Search** page, click **Provider/Organization** tab. • Enter (at a minimum) a **Provider/Organization** name. • Click **Search**.	*You can also click the Search icon at the top of the FSFN Desktop to open the Search page.* *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 expands the search results.* *Placing the setting at High returns results that are an exact match based on the information entered in the Provider/Organization Name and First Name fields.* *The Search Providers of Parent Agency check box returns the parent agency and all providers under that parent agency.* *Note: Once you drill down on the Prior History icon within the Provider expando, and drill down on the Cases expando, the Case Book hyperlink is displayed to the right of each Case associated with that particular Provider.*
Search for a Worker	• On Desktop, click **Utilities** menu. • Click **Search**. • From **Search** page, click **Worker** tab. • Enter (at a minimum) a **Last Name**. • If entering a search with data in **Name** fields, set **Search Precision** bar to the setting needed (Low to High). • Click **Search**.	*You can also click the Search icon at the top of the FSFN Desktop to open the Search page.* *If needed, narrow the search further by entering information in the County field.* *Setting the Search Precision bar to a lower setting expands the search results. Placing the setting at High returns results that are an exact match based on the information entered in the Last and First Name fields.* *Note: Once you drill down on the Worker icon within the Workers expando, the Case Book hyperlink is displayed to the right of each Case associated with that particular worker.*

Search		
Search for Investigation/Special Conditions Referral Workload Page	• On FSFN Desktop, click **Utilities** menu. • Click **Investigation/Special Conditions Referral Workload**. *OR* • From **Case Book**, select ***Investigation/Special Conditions Referrals*** from the work list drop down. • All Investigation/Special Conditions Referrals display with hyperlinks to each referral. *OR* • From **Person Book**, select ***Investigation/Special Conditions Referrals*** from the work list drop down. • All Investigation/Special Conditions Referrals display with hyperlinks to each referral.	*The results are returned only if the "Worker Name" being searched (if applicable) is identified as the Primary or Secondary Investigator on the Intakes tab of the Investigation or Special Conditions Referral.* *When logged into the system and accessing the Investigation/Special Conditions Referral Workload page, the workers associated with the logged in Supervisor, within their Unit(s), display in the Worker Name drop down for selection.* *Access for users includes Protection Investigators Child and Adult, Investigation Supervisors Child and Adult, Licensing Specialists, Case Specialists, and Prevention Specialists. In addition, the pieces of work: FSFN Case Name; Intake/Investigation ID; Screening Decision Date/Time; Intake Type; Days Elapsed; Commencement Date/Time; Most Recent Danger Assessment (PDA); Family Functioning Assessment (FFA)-Investigation; Most Recent Supervisor Consultation; Risk Assessment; Initial Safety Assessment Completed; and Primary Investigator, only launches in Edit or View mode if the worker accessing the Investigation/Special Conditions Referral Workload page has an active assignment to the associated FSFN Case and has the applicable security.*
Access the Interstate Compact System (ICS)	• On Desktop, click **Utilities** menu. • Click **Interstate Compact System**. • The **Log In** page for **ICS** displays.	*The Interstate Compact System (ICS) selection only launches the Log In page to the Interstate Compact System.* *Only workers with the applicable security have the ability to launch the Log In page for ICS.* *You must enter the applicable log in credentials for ICS, which is external to the FSFN system security.*

Maintain a Case

How Do I…?	How Do I…?	How Do I…?
Add a Participant	• On Desktop, click **Cases** expando. • Click **Case Name** hyperlink. • From **Maintain Case** page, on **Participant** tab, click **Insert**. • On **Person Search** page, enter (at a minimum) a **Last Name**. • Click **Search**. – If the person is found, click the **Select** hyperlink next to the person's name and click **Continue**. – If the person does not exist, click **Create**. • The **Person Management** page displays. • Enter basic information. • Click **Save**. • Click **Close**.	*Follow Search tips located in the Search section when searching for a person.* *If the person you want to create is identified to have a duplicate SSN, the Potential Person Match page opens. You have to view every duplicate SSN before you can allow the duplicate SSN and continue with adding the person to the case. Once viewed, the person's record displays the Viewed icon with a check mark. After the duplicate records have been viewed the Allow Duplicate SSN button will be available.*
Delete a Participant	• On Desktop, click **Cases** expando. • Click **Case Name** hyperlink. • From **Maintain Case** page, click **Participants** tab. • Click **Remove** hyperlink next to the person's name you want to remove. • Click "**Yes"** to confirm removal validation message.	*Supervisors can remove participants who were incorrectly included in a case.* *FSFN displays a validation message if the person you are trying to remove is "Unknown, Unknown."* *You are prompted to navigate to the Person Management page and evaluate whether or not they can merge the unknown person into an existing person.*

Maintain a Case		
Add a Participant's Relationship	• On Desktop, click **Cases** expando. • Click **Case Name** hyperlink. • From **Maintain Case** page, click **Relationship** tab. • Click **Insert**. • From the three drop downs, select applicable values. • Click **Save**. • Click **Close**.	*You can select any case participant from the Subject(s) drop down lists and define the relationship between them.* *You cannot select the same Subject on the left and the right.*
Modify a Participant's Relationship	• On Desktop, click **Cases** expando. • Click **Case Name** hyperlink. • From **Maintain Case** page, click **Relationship** tab. • From **Relationship** drop down, select a value. • Click **Save**. • Click **Close**.	
Delete a Participant's Relationship	• On Desktop, click **Cases** expando. • Click **Case Name** hyperlink. • From **Maintain Case** page, click **Relationship** tab. • Click **Delete** hyperlink • Click "**Yes** "when the validation message is received. • Click "**No"** to cancel the action. • Click **Save**. • Click **Close**.	*A Delete hyperlink appears to the right of each relationship row.*

Maintain a Case

Add and Change Case Address	• On FSFN Desktop, click **Cases** expando. • Click **Case Name** hyperlink. • On **Maintain Case** page's **Address** tab, update relevant fields. • Click **Save** and **Close**. If the address is to be replaced with the Intake/Referral Address: • On the **Address** tab, click **Update**. • On **Update Address** page, select relevant check box(s) before participant's name. • Click **Save**. • Click **Close**.	*The Begin Date of an address change must be either the current date or a past date. The Begin Date for an address cannot be a future date.* *Update mode allows you to replace the case address with the intake address if the latter is verified as correct during the investigation.*
View the Address History for a Participant	• On **Maintain Case** page, click **Participant's Name** hyperlink. • On **Person Management** page, click **Address** tab.	*The Address tab displays addresses in reverse chronological order.*

Add Professional Contact	• On Desktop, click **Cases** expando.
	• Click **Case Name** hyperlink.
	• From **Maintain Case** page **Professional/Family Support Network tab**, click **Insert**.
	• On **Person Search** page, enter (at a minimum) a **Last Name**.
	• Click **Search**.
	  – If the person is found, click the S**elect** hyperlink next to the person's name and click **Continue**.
	  – If the person does not exist, click **Create**.
	• On **Person Management** page, enter basic information.
	• Click **Save**.
	• Click **Close**.	

Maintain a Case		
Add Other Contacts	• On Desktop, click **Cases** expando. • Click **Case Name** hyperlink. • From **Maintain Case** page's **Professional/Family Support Network** tab, click **Insert**. • In **Other Contacts** group box, click **Insert**. • Enter applicable information. • Click **Save**. • Click **Close**.	
Delete Contacts	• Click **Delete** hyperlink next to the name of the contact you want to delete. • Click **Save**. • Click **Close**.	
Initiate Case Closure	• On Desktop, click **Cases** expando. • Click **Case Folder** icon. • Click **Case Name** hyperlink. • On **Maintain Case** page, select **Closing History** tab. • Click **Options** drop down and select ***Submit Case Closure Request***. • Click **Go**. • Enter relevant field information on **Case Closure** page. • Click **Save**. • Click **Close**.	*The program checks cases for which a closure request has been submitted to determine whether the closure should proceed. It processes case records from the Case Closure table that have a status of "Pending" or "Closure Request Denied." The program performs a check on each case to determine if any specific conditions exist (see the Case Closure Topic Paper for current conditions).*

Maintain a Case

Complete Case Closure	• On Desktop, click **Cases** expando. • Click **Case Folder** icon. • Click **Case Name** hyperlink. • On **Maintain Case** page, select **Closing History** tab. • Complete any final documentation prior to closure. • Click **Options** drop down and select ***Approval***. • Click **Go**. • Click **Save**. • Click **Close**.	*These steps must be completed after the batch process runs.*