Multi-Topic Supervisory How Do I … Guide

November 10, 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…

Add / View / Manage / Reroute Approvals

How Do I…?	Selections	Tips & Guidelines
Approve Case/Provider Work	• From Desktop **Approvals** expando, expand **My Approvals**. • Expand applicable pending approval item. • Click **Case** hyperlink. • From applicable page, select ***Approval*** from **Options** drop down. • Click **Go**. • From **Approval History** page, select appropriate **Approval Decision** radio button. • Click **Continue**. Approval Decision selections: – **Approve** – to approve work and forward for Supervisory Approval, if needed. – **Reroute** – to forward work for approval to another worker using Reroute Worker Approval page, which is accessed by clicking **Other** hyperlink. – **Recall/Return** – to recall or return work that has been submitted for approval. Work is recalled when any item on page is changed; approval process must be re-initiated. – **Not Approve** – to finalize work that is not receiving approval. The work is "frozen" with a status of Not Approved.	*Pending Approvals display under My Approvals expando, accessed via the Approvals expando on the Desktop.* *The system displays all approvals across all assigned profiles within the FSFN application.* *Approvals that are not under the profile that the supervisor is currently logged in with do not display as a hyperlink, but as plain black text and do not have an Actions hyperlink displayed to the right.* *If there are Approvals under another profile, and the supervisor needs to review the approval within FSFN, the supervisor must log out and log back in under that applicable profile.*

Add / View / Manage / Reroute Approvals

How Do I…?	Selections	Tips & Guidelines
View Approval History	• From a page requiring approval, select ***Approval*** from **Options** drop down. • Click **Go**. • The **Approval History** page displays. Approval History Status descriptions*:* – **Initial Status/Initial Action** – Item has been created by original worker but not approved. – **Pending Status/Approved Action** – Item is in **Pending** status in the approval process but has been approved by original worker. – **Pending Status/Received Action** – Item is in **Pending** status in the approval process but has been received by next approver or supervisor **Approved**. **Status/Approved Action** – Item has completed the approval process. – **Not Approved Status/Not Approved Action** – Item has completed the approval process.	*The Approval History page displays a historical view of each person in the approval chain, his or her status, and the date of the approval action. The most recent approval is displayed first.*
Add/View Approval Comments	• From Desktop, select a case from **Approvals** expando. • Click appropriate **Case Folder** icon. • Click appropriate **Service** icon. • Click **Actions** hyperlink. • Click **Continue**. • On **Comments** pop-up page, type appropriate comment. • Click **Save**. • Click **Close**.	*Use the Comments pop-up page to add a comment to a document that is in the approval process.* *Any user involved in the approval history can document and view comments added to a document.* *Note: If the supervisor has Approvals under another profile, then the supervisor must log out and log back in under that applicable profile to approve these approvals.*

Add / View / Manage / Reroute Approvals

How Do I…?	Selections	Tips & Guidelines
Manage Pending Approvals	• From Desktop **Utilities** menu, select **Approval Management**. • From **Approval Management** page, in **Approval Activity** group box: – If **Manage My Pending Approvals** is selected, either select a worker from **Worker** drop down, or select ***All*** workers. – If **Reroute Worker Approvals** is selected, select worker from **Worker** drop down (See *Reroute Worker Approvals* below.). • In **Manage My Pending Approvals** group box, select check box next to work requiring approval. • In **Approval Decision** group box, select an ***Approval Decision***. • Click **Save**. • Continue with preceding steps until desired cases have been processed for approval. • Click **Save**. • Click **Close**. • To view the case prior to approval, click hyperlink next to the case in **Work Type** column. The page displays. – Review page. – Click **Close**. – You are returned to **Manage My Pending Approvals** page for an approval decision. – Review page; select ***Approval*** from **Options** drop down. – Click **Go**. – The **Approval History** page displays. – Select **Approval Decision.** – Click **Save**. – Click **Close**.	*The Manage My Pending Approvals page displays work that has been approved by a worker and forwarded to a supervisor. The work can also be viewed prior to approval.* *Approvals with a status of Initial do not appear on the Manage My Pending Approvals activity.* *Review the work prior to making the approval decision by clicking the links in the Work Type column.*

Add / View / Manage / Reroute Approvals

How Do I…?	Selections	Tips & Guidelines
Reroute Worker Approvals	• From Desktop **Utilities** menu, select **Approval Management**. • From **Approval Management** page, select **Reroute Worker Approvals** radio button. • In **Worker** field, select name of worker for whom you are rerouting approvals. • Select check box(es) adjacent to work item(s) you are rerouting. • From **Select Receiving Worker** group box, click **Select Worker** hyperlink. • From **Reroute Worker Approval** pop-up page, select worker who is receiving rerouted approvals. • Click **Continue**. • Click **Save**.	*Useful when a worker has left the agency and approvals need to be routed to another worker so that the original worker can be inactivated.*

<table>
<tr><th colspan="3">Create / Close / Reassign Assignments</th></tr>
<tr><th>How Do I…?</th><th>Selections</th><th>Tips & Guidelines</th></tr>
<tr><td>Assign Case</td><td>• From Desktop Cases expando, identify case to be assigned.
• Click Actions hyperlink next to identified Case.
• From Actions pop-up page, select Create Assignment radio button.
• Click Continue.
• To create an assignment to a unit worker:
– From Create Worker Assignment page, select radio button next to unit worker that you want to assign case.
– Select appropriate drop down for Type, Responsibility, and Role for these required fields.
• To create an assignment to a worker in another unit:
– Select County or State radio button in View By group box.
– Click County or State icon to expand unit list.
– Click Unit icon to expand Worker list.
– Select radio button next to worker that you want to assign case.
– Select Type, Responsibility, and then Role.
• To create an assignment to a worker using worker search:
– Select Type, Responsibility, and then Role.
– Click Search hyperlink to search for, and then add worker.
• Click Assign.</td><td>FSFN automatically generates an email to the workers to notify them of the new assignment.

To sort unit work by title, select the Position Title radio button.

If the case has been previously assigned, the Task Due Reassignment page displays for you to confirm. Click Save.</td></tr>
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Create / Close / Reassign Assignments

How Do I…?	Selections	Tips & Guidelines
Close Assignment to yourself, another supervisor, or worker if you have assignment to case	• From Desktop **Cases** expando, click **Case** icon to expand case work. • Click **Assignment** icon to expand worker assignments. • Click appropriate **Worker Name** hyperlink. • From **Worker Assignment** page, click **End Assignment** radio button in **Status** group box. • Click **Save.** • Click **Close**.	*Assignment cannot be closed if incomplete approvals exist.* *The supervisor is not allowed to end the last assignment on a case manually.* *The system checks to see if an incomplete approval chain exists for the worker whose assignment is being closed.* *When an incomplete approval chain exists, a message box is displayed stating, "Pending approvals exist for this worker. Approval process must be completed before assignment can be closed."* *The assignment closure process terminates allowing the supervisor and worker to complete outstanding approvals. If no incomplete approval chains exist, the assignment closure process completes.*
Reassign Tasks via assignment process (current assignment closed)	• From Desktop **Worker** expando, identify case or provider work to be assigned. • Click **Actions** hyperlink next to identified case or provider. • From **Actions** pop-up page, select **Assignment Maintenance** radio button. • Click **Continue**. • From **Worker Assignment** page, select **End Assignment** radio button in **Current Worker Status** group box. • Click **Reassign**.	*If the existing assignment is ended, the Task Due Reassignment page does not appear and all existing tasks are automatically routed to the newly assigned worker.* *You cannot close a primary assignment unless you are creating a new primary assignment.*

View / Accept / Reject / Delete Case Transfer Requests

How Do I…?	Selections	Tips & Guidelines
View, Accept, Reject, or Delete Case Transfer Requests	• From Desktop, click **Utilities** menu. • Select **Case Transfer Request** menu item: – **Accepted** – **Rejected** – **Pending** • Click **Close**.	*Through this page, the Sending Unit Supervisor can view his or her pending Case Transfer Requests that have yet to be accepted or rejected, as well as any Case Transfer Requests that were accepted or rejected from other supervisors.* *The Sending Unit Supervisor also has the option to delete the pending Case Transfer Requests that he or she has previously sent by clicking on the Delete hyperlink.* *The Receiving Unit Supervisor navigates to this page to view his or her pending Case Transfer Requests and clicks on the Case ID hyperlink to view the Case Transfer Request.*

Create / Update On Call Management

How Do I…?	Selections	Tips & Guidelines
Create an On-Call Schedule	• From Desktop **Utilities** menu, select **On-Call Schedule**. • Click **Maintain**. • On **Maintain On-Call Schedule** page, click **Basics** tab. • From **On-Call Schedule** group box, select county, month, year, and program from **County**, **Month, Year**, and **Program** drop downs. • Click **Search**. • A **Validation Error** pop-up appears, stating, "*An on-call schedule for criteria specified does not exist. Do you want to create it?*" • Click **Yes**. • The **Receiving Unit Contact Information** group box pre-populates based on prior Search criteria. • In **On-call Supervisors** group box next to Primary **Supervisor**, click **Search**. • From **Worker Search** page, select radio button next to appropriate supervisor listed in **Worker's Returned** group box • Click **Continue**. • The **Maintain On-Call Schedule** page's **Basic** tab displays, and selected supervisor pre-fills **On-Call Supervisors** group box. • Complete same steps to search for and choose a back-up supervisor, if applicable. • From **On-Call Supervisors** group box, enter the following: – County sheriff number in **County Sheriff Phone** text box. – Services contact phone number in **Services Contact** text box. – In **Schedule Comment** group box, enter comments, if applicable, in **Schedule Comment** narrative text box.	*If you receive the message, 'On-Call Schedule does not exist' it is because there is no Receiving Unit designated for the County and Program.* *When scheduling a worker for on-call, multiple dates and times can be selected as long as they are for one (1) worker. Each worker needs the schedule complete and saved separately.* *A copy function is available on the Maintain On-Call Schedule page > Schedule tab > Copy On-Call Schedule group box. This function allows you to create additional On-Call schedules using a previous schedule.*

Create / Update On Call Management

How Do I…?	Selections	Tips & Guidelines
Create an On-Call Schedule (cont.)	• Click **Schedule** tab. • In **Copy On-Call Schedule** group box, select month and year from **Month** and **Year** drop downs. • In **On-Call Worker Assignment** group box, select check box next to date(s) and time(s) being scheduled. • Click **Search** hyperlink next to **Primary on-Call**. • From **Worker Search** page, select radio button next to appropriate worker listed in **Worker's Returned** group box. • Click **Continue**. • The **Maintain On-Call Schedule** page's **Schedule** tab displays. • Click **Save**. • The selected worker pre-fills **Primary** column of on-call schedule table in **On-Call Worker Assignment** group box. • Complete the same steps to search for and choose a back-up supervisor, if applicable. • Repeat steps to designate an on-call worker for each subsequent worker's date(s) and time(s).	

Create / Update On Call Management

How Do I…?	Selections	Tips & Guidelines
Update On-Call Schedule	• From Desktop **Utilities** menu, select **On-Call Schedule**. • Click **Maintain**. • From **Maintain On-Call Schedule** page's **Basics** tab, select **County**, **Year**, **Month,** and **Program** for schedule you want to update. • Click **Search**. • The on-call schedule displays on **Schedule** tab. • Click **Schedule** tab. • Select check box next to date(s) and time(s) for on-call staff being updated. • Click **Search** hyperlink next to **Primary On-Call**. • From **Worker Search** page, search for a worker. • Select radio button for chosen worker in **Workers Returned** group. • Click **Continue**. • Click **Save**. • The updated worker selected displays in **Primary Worker** column in **On-Call Worker Assignment** group box. • Repeat steps to designate an updated on-call worker for each subsequent worker who needs to be updated.	*There can be any number of dates and times, as long as one (1) worker takes all of those dates and times.* *The On Call Schedule for the Selected County and the Program type is available for viewing through the On-Call Schedule button in the CI Unit Documentation group box directly next to the Assign button. The system directs the worker to the appropriate On Call schedule based on the Date, County, and Program information. The On Call Schedule button is available for selection at any point prior to the CI Unit assigning the Intake to either a Receiving Unit or an Investigator. After which point, the On Call Schedule button is disabled.* *The On-Call Schedule is always accessible via the Utilities menu on the Desktop.*

Correct a Placement History		
How Do I...?	Selections	**Tips & Guidelines**
View/Edit/Correct a Placement History	• From Desktop **Utilities** menu, select **Placement Correction**. • The **Placement History** page displays. • Click **Search** hyperlink, search for, and select a child. • The system pre-fills **Child's Information** group box and **Placement Correction History** group box. • On **Placement History** page, click **Edit** hyperlink. • The **Placement Correction Detail** displays. • Click **Save**. • Click **Close**. • You are returned to **Placement History** page. • From **Options** drop down, select ***Validate Corrections to Placement History*** (This processes an edit check against placement history.). • Submit for **Approval**. • Click **Save**. • Click **Close**.	*Your security profile setting determines whether a worker can only view or view and modify placement history.* *A placement that is open or undergoing payment processing is not modifiable.* *FSFN allows you to save work with errors; however, errors must be corrected prior to final approval.*

Work with Task Management

How Do I…?	Selections	Tips & Guidelines
Reassign Task to another worker	• From Desktop **Utilities** menu, select **Task Due Management**. • The **Task Due Management** page displays. • From **Task Due Management** page, select **Task Due Reassignment** radio button. – In **Worker** field, select worker whose tasks must be reassigned. – In **Case/Provider** field, select case or provider with tasks to be reassigned. – The **Task Due Reassignment** group box displays all tasks that can be reassigned for case. – For each task to be reassigned, select appropriate worker in corresponding **Reassign Task To** field from drop down. • Click **Save**. • Click **Close**.	*Only supervisors can reassign tasks for their own workers.* *Tasks can only be reassigned to another worker who has an open active assignment to the case or provider associated with the selected task.* *AFCARS tasks cannot be reassigned.*
Delete a Task	• From Desktop Utilities menu, select **Task Due Management**. • The **Task Due Management** page displays. • From **Task Due Management** page, select **Task Due Deletion** radio button. • From **Task Due Activity** group box's **Worker** drop down, select a worker whose My Tasks must be deleted. • The **Task Deletion** group box displays tasks available for deletion. • Select **Delete** check box for each task to be deleted. • Click **Save**. • Click **Close**.	*Supervisors can only delete tasks for their own workers.* *Supervisors cannot delete their own tasks.* *AFCARS tasks cannot be deleted.*

Work with Task Management		
View Tasks for a Worker	• From **Workers** expando on Desktop, click **Supervisor** icon to expand outliner to view all workers. • Click **Worker** icon to expand appropriate worker who is assigned to case or provider. • Select **Actions** hyperlink for appropriate case or provider. • Select **View Tasks** radio button. • Click **Continue**. • The **View Task** page displays. • Click **Close**.	
View Past Due Worker tasks	• From Desktop, **My Task Calendar** expando is automatically expanded. • View **Past Due Worker** group box for list of tasks. • Displays **Task Due Name**, **Worker Name**, **Date Due**, **FSFN ID/Investigation Number**, and **Worker Profile**.	*This group box only displays when logged in with a supervisor profile.* *Only those tasks for the current logged in profile in their Parent Unit pre-fills the Past Due Worker group box.* *Tasks past due under other profiles do not display as hyperlinks, but display in red font.*

View / Create / Renew / End Alert Management

How Do I…?	How Do I…?	How Do I…?
View/Create an Alert	• From Desktop, click **Cases** expando. • Click **Actions** hyperlink next to case name. • From **Actions** pop-up page, select **Create Alert** radio button. • Click **Continue**. • The **Maintain Alert** page displays. • In **Alert Information** group box: – Select alert type from **Type** drop down. – Type alert description in **Narrative** field. • In **Missing Person** group box, add a person. – Click **Insert**. – The **Case Participants and Collaterals** pop-up page displays. – Select appropriate person check box. – Click **Continue**. FSFN adds each selected person to **Missing Person** group box table. • To remove a person from **Missing Person** group box, click **Delete** hyperlink next to person. – The system displays a verification pop-up page. – Click **Yes**, **No**, or **Cancel**. – You are returned to **Maintain Alert** page. – You can add a case participant, who is not the missing person, in **Other Person** group box. – Enter **Other Person** group box information in same manner as entering **Missing Person** group box information. – The system adds/removes each selected person to/from **Other Person** group box.	*Only supervisors are authorized to create an Alert. Once an Alert is created, it can be renewed to extend or expired by the supervisor.* *You can view an Alert from your Desktop if the associated case is assigned to you or by completing a person or case search.* *If the person you want to add in the Missing Person group box does not display in the pop-up because they are not a case participant, you need to add the person to the Maintain Case page (See Maintain Case section.).*

View / Create / Renew / End Alert Management

How Do I…?	How Do I…?	How Do I…?
View/Create an Alert (cont.)	– From **Worker Information** group box, click **Search** hyperlink. – The **Worker Search** pop-up page displays. – In **Search Criteria** group box, enter worker name and other search criteria, if known. – Set **Search Precision** from Low to High. – Click **Search**. – In **Workers Returned** group box, select radio button for worker initiating the Alert. – Click **Continue**. The **Worker Search** pop-up closes. Selected worker pre-fills **Worker Information** group box on **Maintain Alert** page. • Click **Save**. • Click **Close**.	*Only supervisors are authorized to create an Alert. Once an Alert is created, it can be renewed to extend or expired by the supervisor.* *You can view an Alert from your Desktop if the associated case is assigned to you or by completing a person or case search.*
Renew an Alert	• Open **Maintain Alert** page. See *View/Create an Alert* section to complete these steps. • Enter **Renewed Date**. • The system defaults expiration date to be 180 days from **Renew Date**. • Click **Save**. • Click **Close**	*Only authorized staff have security access to renew an alert*
End an Alert	• Open **Maintain Alert** page. See *View/Create an Alert* section to complete these steps. • From **Maintain Alert** page, enter **Expiration Date**. • Click **Save**. • Click **Close**.	

Work with Case Actions

How Do I…?	Selections	Tips & Guidelines
De-Link a Mistakenly Linked Services Report to CPS Report from a Case	• From Desktop **Cases** expando, click **Case Name** hyperlink. • The **Maintain Case** page displays. • From **Maintain Case** page, select ***Delink Intake*** from **Options** drop down. • Click **Go**. • Select applicable referral/intake, click **Save**. • Click **Close**.	
Remove Person Mistakenly Added to Case	• From Desktop **Cases** expando, click **Case Name** hyperlink. • The **Maintain Case** page displays. • From **Maintain Case** page, click **Remove** hyperlink for appropriate participant you want to remove. • Click **Save**. • Click **Close**.	*Only a supervisor can remove a participant who has been erroneously added to a case and who is not associated with any open case work.* *A worker or a supervisor can deactivate a participant who is a participant in the case, but not an active participant.* *See the Case Maintenance How Do I Guide for more information on deactivating a participant.*

Complete Investigation Supervisory Review

How Do I…?	Selections	Tips & Guidelines
Complete an In-Home Safety Assessment - Supervisory Review Tab	• To open **Safety Assessment**: – From **Cases** expando, expand Case containing the Investigation. – Click **Investigation** icon, and then click **Safety Assessment** hyperlink for the safety assessment you want to review. • Click **Initial In-home Safety Assessment** icon. • The **Updated In-home Safety Assessment** page displays. • Click **Supervisory Review** tab. • From **Safety Assessment Information** group box, answer required questions by selecting ***Agree*** or ***Disagree*** from drop down list: – For each question drop down, select supervisory concurrence (***Agree*** or ***Disagree***). • Enter **Further Actions Needed**: – Enter a narrative description in **Further Actions Needed** text box. – Enter summary description for each safety assessment area in **Supervisor Comments** text field. – If enabled, enter a response for **Second Party Review**. – If enabled, enter a response for **On Sight Investigation Justification**. • Complete all applicable required fields. • Click **Save**. • Click **Close**.	*Supervisor receives an email that the safety assessment has been submitted to them for review.* *The second party review criteria is auto selected by the system. If the check boxes are selected, then the assessment meets the criteria for a second party review; it must be submitted for SPR. If the assessment does not meet the criteria for SPR, the supervisor may choose to submit it anyway.* *If a date is entered in the Updated Safety Assessment Due Date field, an Updated Safety Assessment task displays in the Due in the Future group box on your FSFN Desktop 72 hours before the Updated Safety Assessment is due.* *If the task becomes past due, it displays in the Currently/Past Due tasks group box on your Desktop.* *The past due task is also escalated to your Supervisor's Desktop in the Past Due Worker group box.*