Prepared for State of Florida Department of Children and Families

The Florida Safe Families Network (FSFN) **Notes** 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.

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Create Case Notes		
How Do I…?	**Selections**	**Tips & Guidelines**
Create a Case Note page from Desktop	• From Desktop, click **Case Work** on Banner. • On **Create Case Work** page, select category from **Narrative** drop down. • In **Cases** group box, select case. • In **Case Participants** group box, select participant(s). • Click **Create**. • On **Case Notes** page, enter **Contact Begin Date/Time**. • From the **Category** drop down, select applicable value. • From **Type** group box, select all appropriate checkboxes. • If applicable, choose the hyperlink for either **Add Face-to-Face Contacts** or **Add Non Face-to-Face Contacts** to document the details of the contact. • In **Participants** group box, select appropriate **Applies To** checkbox(es). • In **Narrative** field, enter text. • Enter other data as needed. • Click **Save**. • Click **Close**.	*Create Case Notes three (3) ways from Desktop:* ▪ *Click Case Work on Desktop Banner* ▪ *Click Create > Case Work menu on Desktop* ▪ *Click Actions hyperlink next to a Case or Participant, select Create Case Note on Actions pop-up page* *Hold down 'Ctrl' key to select multiple participants.* *A single Case Note can have many "types" assigned to it. Although you may select several "types" for a note, it is still just one (1)Case Note.* *Types available for selection are dynamically displayed based upon the Category that you select.* *The Add Non Face-to-Face Contact hyperlink remains hidden or becomes available based upon the Category and Types selected.* *Only the worker who creates the Case Note or the supervisor of the worker who creates the Case Note can update a Case Note.*

Create Case Notes

How Do I…?	Selections	Tips & Guidelines
Create a Case Note page from Case Book	• From **Case Actions List Box**, click **Case Notes** hyperlink. • On **Case Notes** page, enter **Contact Begin Date/Time**. • From **Category** group box, select appropriate category. • From **Type** group box, select all appropriate checkboxes. • In **Participants** group box, select appropriate **Applies To** checkbox(es). • In **Narrative** field, enter text. • Enter other data as needed. • Click **Save**. • Click **Close**.	*You can also click the Create Case Work hyperlink at the top-center of Case Book to create a Case Notes page.* *Types options change depending on Category selected.* *The Add Non Face-to-Face hyperlink dynamically displays based upon Category and Types selected.* *Security is required to select Substance Abuse Mental Health (SAMH) category.* *Only the worker who creates the Case Note or the supervisor of the worker who creates the Case Note can update a Case Note.* *A single Case Note can have many "types" assigned to it. Although you may select several "types" for a note, it is still just one (1) Case Note.* *Case Notes cannot be created from Case Book if it is launched from Search.*

Create Case Notes

How Do I…?	Selections	Tips & Guidelines
Create a Case Note page from Search (Utility)	• From Desktop, click **Search** on Banner. • Conduct search on **Case**, **Person**, or **Worker** tabs. • Click **Actions** hyperlink next to Case or Participant in search results. • On **Actions** pop-up page, select **Create Case Notes** checkbox. • Click **Continue**. • On **Case Notes** page, enter **Contact Begin Date/Time**. • From **Category** group box, select appropriate category. • From **Type** group box, select all appropriate checkboxes. • In **Participants** group box, select appropriate **Applies To** checkbox(es). • In **Narrative** field, enter text. • Enter other data as needed. • Click **Save**. • Click **Close**.	*Case Notes can be created for 'open' and 'closed' Cases from Search.* *Case Notes cannot be edited (including by the creator) when created from Search.* *The Add Non Face-to-Face hyperlink dynamically displays based upon Category and Types selected.* *Security is required to select Substance Abuse Mental Health (SAMH) category.*

Create a Commencement Note and Face-to-Face Contact

How Do I…?	Selections	Tips & Guidelines
Create an Initial Commencement Note for an Investigation	• From Desktop, expand investigation. • Click **Investigation** hyperlink. • From **Intakes** tab, click **Commencement** hyperlink. • On **Case Notes** page, enter **Contact Begin Date/Time**. • In **Participants** group box, select appropriate **Applies To** checkbox(es). • In **Narrative** field, enter text. • Enter other data as needed. • Click **Save**. • Click **Close**.	*All Initial and Additional Intakes/Referrals require a commencement note. You can commence more than one intake/referral on a note.* *Intakes/Referrals display on the commencement note in sequential order with a checkbox (to ensure an intake/referral is not skipped over).* *Selecting the checkbox associates the Intake/Referral with the commencement activity and displays the date.* *Only the first date displays as hyperlinks for notes commencing multiple intakes.* *Clicking the hyperlinked Commencement date opens the note for editing by the user creating the note or the supervisor/acting supervisor of that user. Others have read-only access.*
Create Face-to-Face Contact from Commencement Note	• Within **Commencement Note**, click **Add Face-to-Face** hyperlink. • In **Contact Information** group box, rows were added for each person selected in **Participants** group box. • From **Face-to-Face Contact** drop down, select appropriate value and reason not seen, if applicable. • If visit occurred on a different date, select **Different Date** checkbox and enter correct date and time.	*The Different Date checkbox allows the user to indicate the Face-to-Face was conducted on a different date. If there is no change to the date, FSFN uses the Contact Begin and End times for the Face-to-Face Contact. This is important to remember for reporting, which needs to reflect the accurate Face-to-Face date/time.* *If the Different Date checkbox is selected, the date entered must be equal to or later than the Contact Begin and End times documented on the note.*

Document Face-to-Face Contact from within an Investigation

How Do I…?	Selections	Tips & Guidelines
Create Initial Face-to-Face Contact from within the Investigation	• From Desktop, expand open investigation. • Click **Investigation** hyperlink. • On **Contacts/Notifications** tab within **Contacts** group box, click **Insert**. • Enter **Contact Begin Date/Time**. • From **Type** drop down, select ***Initial Face-to-Face***. • In the **Participants** group box, select appropriate **Applies To** checkbox(es). • In **Narrative** field, enter text. • Enter other data as needed. • Click **Add Face-to-Face** hyperlink. • In **Contact Information** group box, rows were added for each person selected in **Participants** group box. • From **Face-to-Face Contact** drop down, select appropriate value and reason not seen, if applicable. • If visit occurred on a different date, select **Different Date** checkbox and enter correct date and time.	*You may enter Initial Face-to-Face Contacts on a Commencement Note or other Home visit note. FSFN does not look for the specific type of "Initial Face-to-Face" as a note type for reporting purposes. FSFN will look across all notes to calculate and document the Initial Face-to-Face date, time, and outcome.* *The Different Date checkbox allows the user to indicate the Face-to-Face was conducted on a different date. If there is no change to the date, the system uses the Contact Begin and End times for the Face-to-Face. This is important to remember for reporting, which needs to reflect the accurate Face-to-Face date/time.* *If the Different Date checkbox is selected, the date entered must be equal to or later than the Contact Begin and End times documented on the note.*

Document Non Face-to-Face Contact within a Case Note

How Do I…?	Selections	Tips & Guidelines

Document a Non Face-to-Face Contact within a Case Note	• Within a **Case Note**, click **Add Non Face-to-Face** hyperlink. • In **Non Face-to-Face Contact Information** group box, rows were added for each person selected in **Participants** group box. • From **Non Face-to-Face Contact** drop down, select appropriate value and reason not completed, if applicable. • If contact is made on a different date, select **Different Date** checkbox and enter correct date and time.	*Case notes provides the ability to document non face-to-face contact details when the contact being made is by telephone, email, fax, or other correspondence.* *The Add Non Face-to-Face hyperlink dynamically displays within the Case Note once certain Category and Types have been selected, which includes types that are related to telephone, email, fax, or other correspondence.*

Create Substance Abuse Mental Health (SAMH) Case Notes

How Do I…?	Selections	Tips & Guidelines
Create a SAMH Case Note page from Desktop	• From Desktop, click **Case Work** on Banner. • On **Create Case Work** page, select ***Substance Abuse Mental Health (SAMH)*** from **Narrative** drop down. • In **Cases** group box, select case. • In **Case Participants** group box, select participant(s). • Click **Create**. • On **Case Notes** page, enter **Contact Begin Date/Time**. • From **Type** group box, select **Substance Abuse Mental Health (SAMH)** checkbox. • In **Participants** group box, select appropriate **Applies To** checkbox(es). • In **Substance Abuse Mental Health (SAMH)** group box, select appropriate radio button to indicate progress. • In **Narrative** field, enter text. • Enter other data as needed. • Click **Save**. • Click **Close**.	*Security required for creating SAMH Case Notes.* *Create Case Notes three (3) ways from Desktop:* ▪ *Click Case Work on Desktop Banner* ▪ *Click Create > Case Work menu on Desktop* ▪ *Click Actions hyperlink next to a Case or Participant, select Create Case Note on Actions pop-up page* *Hold down 'Ctrl' key to select multiple participants.* *The SAMH expando is automatically expanded when the Case Note Category of "Substance Abuse Mental Health (SAMH)" Category is selected and is only enabled and required when the Category is "Substance Abuse Mental Health (SAMH)".* *One (1) of the radio buttons must be selected in order to successfully save the Case Notes page.* *Upon selecting Not Adequate or No Progress and saving the Case Notes page successfully, an automated message will be generated and sent to the most recently assigned Primary Case Worker that states the following: 'A Substance Abuse Mental Health (SAMH) Case Note has been documented as "Not Adequate" or "No Progress" for Case ID: XXXXXXX to which you are currently assigned as the Primary. Please review the Case Note to determine next steps <OK> '*

Create Substance Abuse Mental Health (SAMH) Case Notes		
How Do I…?	**Selections**	**Tips & Guidelines**
Create a SAMH Case Note page from Desktop (cont'd)		*NOTE: If an update is subsequently made to the Case Notes page, upon successfully saving the new version of the note, another automated message will be generated if the radio button selection is "Not Adequate" or "No Progress." Regardless if the radio button selection has changed, if upon save it is "Not Adequate" or "No Progress" the automated message will be generated Only if the radio button selection is now "Excellent" or "Adequate" will the automated message not be generated.*

Access Case Notes

How Do I…?	Selections	Tips & Guidelines
Access a Case Note from the Desktop or Search	• From Desktop or **Search** page, expand Outliner to display **Cases > Narratives**. • Click appropriate **Case Notes Category-Type** hyperlink.	*You can access a Case Note from Desktop, Case Book, Person Book, and Utility Search.* *Case Notes associated to an Investigation / Special Conditions Referral (SCR) do not display under Narratives. They display with the Investigation/SCR.* *Only the worker who creates the Case Note or the supervisor of the worker who creates the Case Note can update a Case Note.* *A single Case Note can have many "types" assigned to it. Although you may select several "types" for a note, it is still just one Case Note.* *Case Notes cannot be edited if launched from Search.*
Access a Case Note from Case Book or Person Book	• On **Case Book** or **Person**, select ***Case Notes*** for work type on center group box. • Case Notes display in center panel of **Case Book** page. Click appropriate Case Notes Category- Type hyperlink.	*Case Book displays Case Notes associated to a specific case. Person Book displays Case Notes associated to a person cross all FSFN Cases, open or closed.* *Only Case Notes created or updated within the last 3 months display.* *Sorted by Contact Begin Date* Case Notes associated to an Investigation/ Special Conditions Referral (SCR) display with the Investigation/SCR.

Search for a Case Note

How Do I…?	Selections	Tips & Guidelines
Search for a Case Note from Desktop, Search, or Case Book	• From Desktop or **Search**, expand **Cases** expando. • Click **Actions** hyperlink; **Actions** pop-up displays. • Select **Case Notes Search Criteria** radio button. • Click **Continue**. *OR* • Click **Case Notes Search Criteria** hyperlink at top-center of Case Book. • On **Case Note Search Criteria** page, select start and end dates. • In **Category and Type Criteria** group box, select category or categories from **Categories** list box. • Click **Add** to move highlighted categories to **Selected Categories** list box. • Select **Note Types** from **Types** list box. • Select a specific participant in **Participants'** group box. • Click **Search**. • **Case Notes Search Results Page** returns case notes per your selected search criteria. • Click **View** hyperlink to view note. • Click **Print** hyperlink to print note. • In **Options** drop down, select ***View All Notes***. • Click **Go**. • All **Provider Notes** in search results display. • Click **Close**.	*Notes cannot be edited from Case Notes Search Criteria.* *Start Date defaults to 60 days prior to the current date. End Date defaults to the current date. Both fields are user modifiable.* *Upon selecting an Invs/Assessment Number, the Start Date automatically defaults to the date 01/01/1900.* *Upon selecting the applicable Category/ies, the Types list box dynamically updates to display the applicable Case Note Types available for selection.* *If all Categories or all Types are desired, click Add All. Case Note Search can be narrowed further by selecting a specific Case Participant(s), but is not required.* *Remove Categories and Types in the same manner in which they are added using the Remove and/or Remove All button.*

View current Case Notes or History (all versions)		
How Do I…?	**Selections**	**Tips & Guidelines**
View current Case Notes from Case Notes page	• Access **Case Notes** page. • Click **View Note** hyperlink in **Actions List Box**. • Microsoft Word document opens current version of Case Notes.	*Editing the Microsoft Word document does not update the FSFN Case Notes page.*
View Case Notes History from Case Notes page	• Access **Case Notes** page. • Click **View History** hyperlink in **Actions List Box**. • Microsoft Word document opens with all versions of Case Notes, **Chronological Notes Report**, sorted by versions, starting with first one.	*A versioned history of a note is available by selecting the View History hyperlink on the Case Book page. A Version Number field is displayed within the Case Note header group box, which indicates to the user if there are additional, historical versions of the current note.*
View Case Notes History from Case Book	• On **Case Book** or **Person Book**, select ***Case Notes*** for work type on center group box. • Case Notes display in center panel of **Case Book** page. • Click appropriate **View History** hyperlink.	*Case Book displays Case Notes associated to a specific case. Person Book displays Case Notes associated to a person cross all FSFN Cases, open or closed.* *Only Case Notes created or updated within the last 3 months display.* *Sorted by Contact Begin Date* *Case Notes associated to an Investigation / Special Conditions Referral (SCR) display with the Investigation/SCR.*

Upload an Image (file) to a Case Note

How Do I…?	Selections	Tips & Guidelines
Upload an Image	• After first successful save of **Case Notes** page, click **Upload Image** hyperlink in **Actions List Box**. • On **Imaging** page, enter **Date Document Scanned** in **Image Details** group box. • From **Image Type** drop down, select type. • Click **Browse**. • Locate and select file to upload from **Windows Explorer** page. • Click **Open**. • Selected file displays in **File Name**. • In **Comments** field, enter description (up to 500 characters). • Click **Save**. • Click **Close**. • **Case Notes** page displays and **View Attached Images** hyperlink displays in **Actions List Box**.	*The Upload Image hyperlink only displays once the Case Notes page is saved successfully for the first time.* *You can upload multiple Images to a single Case Notes page.* *Each time the Upload Image hyperlink is clicked, a new Image is uploaded and attached to the Case Notes page.* *When an Image is uploaded to the Case Notes page, both the Image Category and Image Type fields default to "Case Notes" and are disabled.* *If "Other" is selected for Image Type, additional description is required.* *Acceptable file formats: .bmp, .jpg, .jpeg, .rtf, .doc, .xls, and .pdf.* *File name must be less than 50 characters. File size restricted to 25 MB.* ***Important**: Check information before saving. You cannot edit after save.*

View Attached Image	• Access **Case Notes** page. • If images are attached, **View Attached Images** hyperlink displays in **Actions List Box**. • Click **View Attached Images** hyperlink. • All images or files attached to **Case Notes** page display on **Image History** page with a **View** hyperlink for each image or file. • Click applicable **View** hyperlink. • On **Imaging** page, click **View** hyperlink to open image or file. Image or file displays in compatible application (e.g., Microsoft Word or Browser).	*The View Attached Images hyperlink displays only after at least one (1) Imaging page has been created in association with the Case Notes page.* Imaging page cannot be edited from View Attached Images page.

Create Provider Notes

How Do I…?	Selections	Tips & Guidelines
Create a Provider Note page from Desktop	• From Desktop, click **Provider Work** on Banner. • On **Create Provider Work** page, select category from **Narrative** drop down. • In **Providers** group box, select provider. • Click **Create**. • On **Provider Notes** page, enter **Contact Begin Date/Time**. • From **Type** drop down, select appropriate type. • In **Narrative** field, enter text. • Enter other data as needed. • Click **Save**. • Click **Close**.	*Create Provider Notes three (3) ways from Desktop:* ▪ *Click Provider Work on Desktop Banner* ▪ *Click Create > Provider Work menu on Desktop* ▪ *Click Actions hyperlink next to a Provider, select Create Provider Note on Actions pop-up page* *Only the worker who creates the Provider Note or the supervisor of the worker who creates the Provider Note can update a Provider Note.*

Create a Provider Note page from Search (Utility)	• From Desktop, click **Search** on Banner. • Conduct search on **Provider/Organization** tab. • Click **Actions** hyperlink next to Provider in search results. • On **Actions** pop-up page, select **Create Provider Notes** checkbox. • Click **Continue**. • On **Provider Notes** page, enter **Contact Begin Date/Time**. • From **Category** drop down, select appropriate category. • From **Type** drop down, select appropriate type. • In **Narrative** field, enter text. • Enter other data as needed. • Click **Save**. • Click **Close**.	*Provider Notes can be created for 'active' and 'inactive' providers or organizations from Search.* *Provider Notes cannot be edited (including by the creator) when created from Search.* *A Provider Note is not editable from Search.* You can create a Provider Note for an inactive provider but cannot edit the Provider Note once saved and the Provider Notes page is closed.

Access Provider Notes

How Do I…?	Selections	Tips & Guidelines
Access a Provider Note from the Desktop or Search	• From Desktop or Search page, expand Outliner to display **Provider > Narratives**. • Click appropriate **Provider Notes Category-Type** hyperlink.	*You can access a Provider Note from Desktop and Utility Search.* *Only the worker who creates the Provider Note or the supervisor of the worker who creates the Provider Note can update a Provider Note.* *Provider Notes cannot be edited from Search.*

Search for a Provider Note

How Do I…?	Selections	Tips & Guidelines
Search for a Provider Note from Desktop or Search	• From Desktop or **Search**, expand **Providers** expando. • Click **Actions** hyperlink; **Actions** pop-up displays. • Select **Provider Notes Search Criteria** radio button. • Click **Continue**. • On **Provider Note Search Criteria** page, select start and end dates. • In **Category and Type Criteria** group box, select category or categories from categories list box. • Click **Add** to move highlighted categories to **Selected Categories** list box. • Select **Note Types** from **Types List Box**. • Click **Search**. • **Provider Notes Search Results Page** returns provider notes per your selected search criteria. • Click **View** hyperlink to view note. • Click **Print** hyperlink to print note. • Select ***View All Notes*** in **Options** drop down. • Click **Go**. • All Provider Notes in search results display. • Click **Close**.	*Notes cannot be edited from Provider Notes Search Criteria.* *Start Date defaults to 60 days prior to the current date. End Date defaults to the current date. Both fields are user modifiable.* *Upon selecting the applicable Category/ies, the Types list box dynamically updates to display the applicable Provider Note Types available for selection.* *If all Categories or all Types are desired, click Add All.* *Remove Categories and Types in the same manner in which they are added using the Remove and/or Remove All button.*

View current Provider Notes or History (all versions)		
How Do I…?	**Selections**	**Tips & Guidelines**
View current Provider Notes from Provider Notes page	• Access **Provider Notes** page. • From **Options** drop down, select ***View Note***. • Click **Go**. • Microsoft Word document opens current version of Provider Notes.	*Editing the Microsoft Word document does not update the FSFN Provider Notes page.*
View Provider Notes History from Provider Notes page	• Access **Provider Notes** page. • From **Options** drop down, select ***View History***. • Click **Go**. • Microsoft Word document opens with all versions of Provider Notes, **Chronological Notes Report**, sorted by versions, starting with first one.	*A Version Number field is displayed within the Provider Note header group box, which indicates to the user if there are additional, historical versions of the current note.*