



SCANNING

TRAINER GUIDE

SCANNING - TRAINER GUIDE

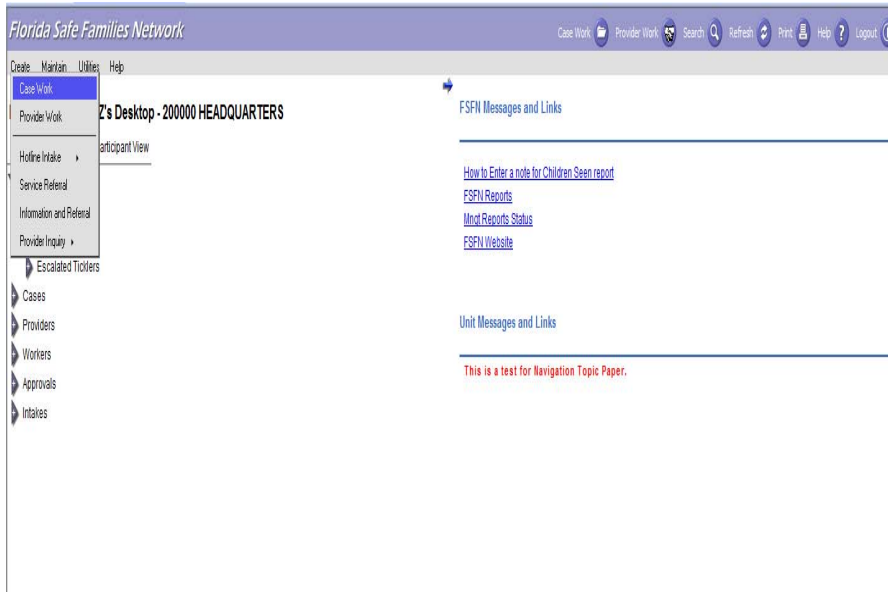
FUNCTIONALITY ADDRESSED:

- This guide outlines the steps to perform key tasks related to uploading, saving and viewing files stored in the Florida Safe Families Network (FSFN) database.

LEARNING OBJECTIVES:

Upon completion of this course, the student will demonstrate the ability to:

- Store and categorize digital files related to cases and case participants.
- View documents that have been stored.



DESKTOP WINDOW

INSTRUCTOR NOTE

- Reference the **Documentation Management** pamphlet published by the Department of State that includes retention schedules for records applicable to the Department of Children and Families (DCF).
- The pamphlet includes all retention schedules written by DCF which establish minimum retention periods for DCF records which aren't covered by the General Records schedule.
- Retention schedules apply to records regardless of their physical format. Records created or maintained in electronic format must be retained in accordance with the minimum retention requirements presented in the schedules, whether the electronic records are the record copy or duplicates.

1. Review relevant **scenario** information.

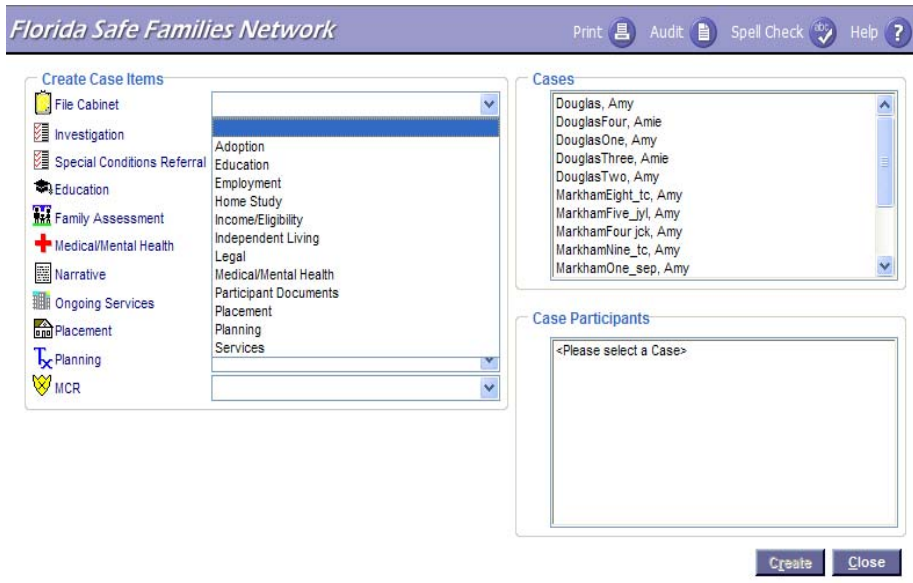
- You have received an email from the counselor at Daniel's school. She has attached a progress report from his teachers. You want to include this information with the case file.
- In this module, you will upload a file for **DANIEL <Markham>**. For this exercise we will use a file stored on the Desktop.
- The Progress Report must be uploaded to be saved in Florida Safe Families Network (FSFN).
- In your office, there will be established policy/procedures regarding file location and how files will be made available to the user.

NOTE

Images can be received in various formats; .bmp, .jpg, .jpeg, .rtf, .doc, .xls and .pdf.
Uploading a file copies the file to the system and leaves the original file on the Desktop.
Existing office policy and practices will apply to files created in FSFN.
Any statutory or code requirements concerning confidentiality of documents will be consistent in FSFN.

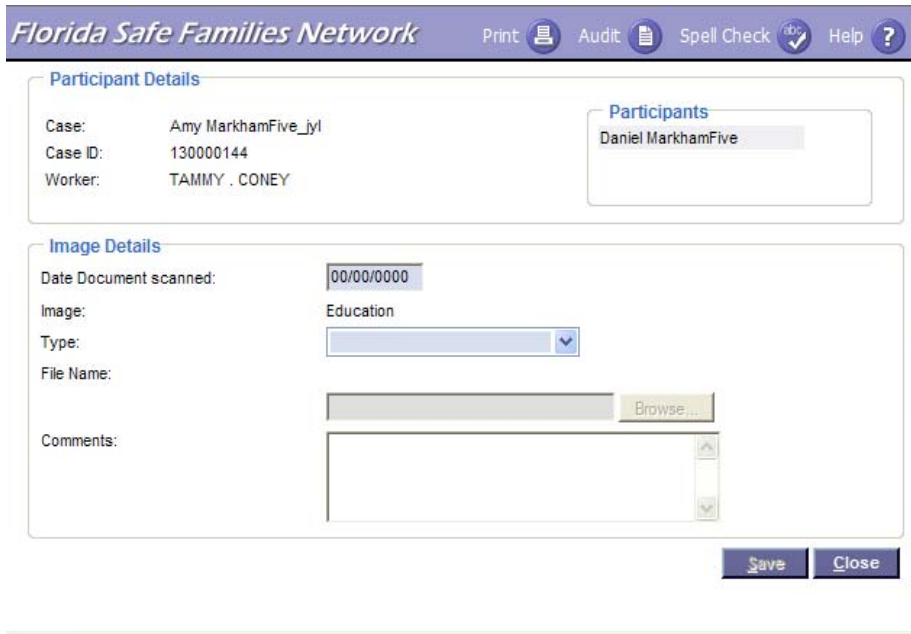
2. From the **Desktop**, select **Create** on the menu bar.

- A dropdown menu of choices displays.



CREATE CASE WORK WINDOW

<p>3. Select Case Work from the dropdown menu.</p>	<ul style="list-style-type: none"> ▪ The Create Case Work window displays. ▪ This window allows you to create work for a family that already exists in Florida Safe Families Network (FSFN). ▪ Another way to display this window is by clicking on the Case Work button on the banner bar.
<p>4. From the File Cabinet dropdown select Education.</p>	<ul style="list-style-type: none"> ▪ There are twelve options available to the user: Adoption, Education, Employment, Home Study, Income/Eligibility, Independent Living, Legal, Medical Mental/Health, Participant Documents, Placement, Planning and Services. ▪ For example: A W-2 form could be used to verify Employment or a paystub could be use to verify Income/Eligibility. Once imaged, these files can be included in FSFN for future reference. ▪ For our scenario, we are going to select Education for Daniel's Progress Report from his school.
<p>5. Select <Markham>, AMY from the list of cases in the Cases group box.</p>	<ul style="list-style-type: none"> ▪ Only cases assigned to you will appear in this window.
<p>6. From the Case Participants group box, select <Markham>, DANIEL.</p>	<ul style="list-style-type: none"> ▪ All participants related to the case will appear in the Case Participants group box.



IMAGING WINDOW

NOTES

- All date fields enable the user to either type in a specific date or use a pop-up calendar to select a date.
- To launch the calendar, right click one time on any date field. The calendar displays. Selecting a date closes the calendar and populates the date field.
- Demonstrate this functionality and inform the students that they can use this method to enter dates on all date fields within FSFN.

7. Click the **Create** button.

- The **Imaging** window displays.
- There are three group boxes in the **Imaging** window:
 - **Participant Details**
 - **Participants**
 - **Image Details**

8. Review the **Participant Details** group box.

- The **Participant Details** group box is pre-filled with the name of the case selected from the **Cases** box on the **Create Case Work** window.
- The Case ID number is displayed.
- The worker name is displayed.

9. Review the **Participants** group box.

- The **Participants** group box is pre-filled with the name selected from the **Case Participants** group box on the **Create Case Work** window.

10. Review the **Image Details** group box.

- In this area, you will provide a date, type of file or information to be uploaded, the file name and add comments for explanation and referencing.

11. In the **Date Document scanned** field, enter **today's date**.

- **Today's** date is entered in the **Date Document scanned**.

IMAGING WINDOW

12. Point out **Image** field.

- This information is pre-filled from the selection made on the **Create Case Work** window.

NOTE

The **Image** selection will determine the options available in the **Type** field. For our example, **Education** was selected and only **Education** related options are available. If **Medical Mental Health** was selected as the **Type**, then only **Medical Mental Health** related options would be available.

13. From the **Type** dropdown select **School Records**.

- Various types of school related files could be uploaded once saved to the Desktop. For example, if an Individualized Education Plan (IEP) is to be uploaded, you would select that option.
- For our scenario, the **School Records** selection will apply for Daniel's Progress Report.

14. Click the **Browse** button to find the location of your file on the desktop.

- The name of the file is now pre-filled in the **File Name** field.

NOTE

The file name must be **50 characters or less**.

15. Select the **Progress Report** file and click the **Open** button to download the file to FSFN.

- This verifies that you want to download the file selected.

16. In the **Comments** field, enter **"Teacher's Progress Report for Daniel Markham."**

- This field will display additional information about the uploaded file.

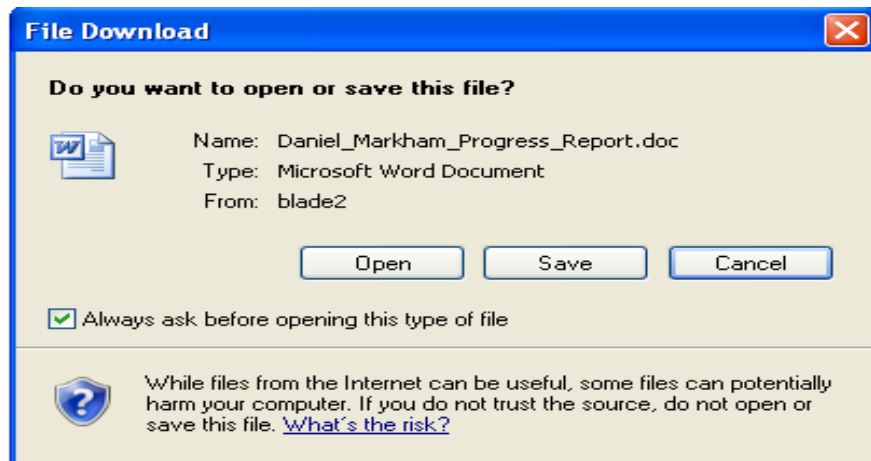
17. Click the **Save** button.

- This will save the uploaded file.

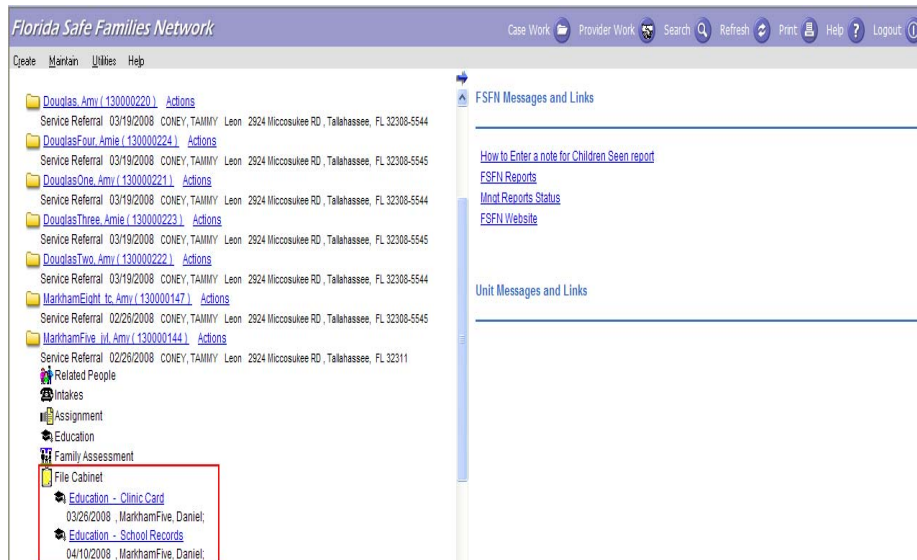
18. Point out the **View** hyperlink.

- The **View** hyperlink is now available.

IMAGING WINDOW



<p>19. Click the View hyperlink and the Open button on the File Download dialog box. Review the Progress Report from the school.</p>	<ul style="list-style-type: none"> An image of the Progress Report displays. The file can be printed if required. The print selection is available on the menu bar - File/Print.
<p>20. Click the “X” on the title bar of the window to close the image.</p>	<ul style="list-style-type: none"> Closes the image and returns to the Imaging window.
<p>21. Click the Close button.</p>	<ul style="list-style-type: none"> The Desktop displays.
<p>22. Refresh the Desktop and expand the Case folder icon to display the File Cabinet icon.</p>	<ul style="list-style-type: none"> The uploaded file is now included under File Cabinet and included in the Markham case folder.
<p>23. Click the File Cabinet icon to display the hyperlink for the file created.</p>	<ul style="list-style-type: none"> Returns to the Imaging window.
<p>24. Click the Close button.</p>	<ul style="list-style-type: none"> The Scanning Window closes and the Desktop displays.



UPDATED DESKTOP WINDOW