MAINTAIN CASE

TRAINER GUIDE
FUNCTIONALITY ADDRESSED:
Maintain Case provides a centralized location to maintain the history of a family’s involvement with the Department of Children and Families. Every piece of work created for a family is linked to one Family Case. Maintain Case provides the flexibility to maintain cases that pertain to children entering Florida from another state, pre and post adoptive cases, as well as many other familial situations.

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

- Launch the Milestones Event List.
- Launch the ICPC Parent Checklist and ICPC Priority Reg. 7 Checklist.
- View the Merge history for a case.
- Split a Case.
- Create a new case after adoption finalization.
1. Overview of Maintain Case
   - Captures the history of a family’s involvement with the Department of Children and Families.
   - The worker is able to view a participant’s status related to various milestones within the FSFN Case.
   - The worker can access checklists pertaining to the Interstate Compact for the Placement of Children (ICPC) for children leaving Florida, going to another state.
   - Maintains the merge history for a case, each time it is merged into another.
   - Allows for the splitting of a case into multiple cases.
   - Note: The ICPC templates for children entering Florida are accessed from the Service Referral Intake page.
   - Note: The Case Merge functionality is documented in the Case Closure How-Do-I-Guide.

2. To access the Maintain Case page from the Desktop, drill down on the Cases expando > select the appropriate Maintain Case hyperlink.
   - The Maintain Case page is displayed.

3. Click the Milestones hyperlink for one of the child participants.
   - The Milestone Events List is launched.

4. Review the Milestone Events List page.
   - All of the fields, except for the following are pre-filled by the system:
     - Date of First Removal Episode from Home (Ever)
**Maintain Case Page-Options Drop Down**

**Do This...**
- Surrenders Signed – Father
- Surrenders Signed – Mother
- Termination of Parental Rights Finalization
- Initial Health Check-Up Scheduled
- Initial Health Check-Up Conducted
- Next Health Check-Up Follow-Up Scheduled
- Health Check-Up Follow-Up Conducted
- Dental Health Check-Up Scheduled
- Dental Health Check-Up Conducted

**Explain...**
- The information entered is displayed.

5. Enter 07/01/2002 in the field labeled Date of First Removal Episode from Home (Ever).


7. Enter 10/08/2008 in the field labeled Termination of Parental Rights Finalization.


10. Enter 10/16/2008 in the field labeled Next Health Check-Up Follow-Up Scheduled.

11. Enter 10/16/2008 in the field labeled Health Check-Up Follow-Up Conducted.

12. Enter 10/09/2008 in the field labeled Dental.

14. Click Save and then Close. Return to FSFN.

15. From the Options dropdown select ICPC Parent Checklist and click the Go button.

16. Click Close and Return to FSFN.

17. From the Options dropdown select ICPC Priority Reg. 7 Checklist and click the Go button.

18. Click Save and then Close. Return to FSFN.

19. Click the Closing History tab.

20. Review the Merged Cases group box.

21. Click the Participants tab.

22. From the Options dropdown select Split
### SPLIT CASE PARTICIPANT SELECTION

**Case Participants**

<table>
<thead>
<tr>
<th>Select</th>
<th>Participant Name</th>
<th>DOB</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>baby billiards</td>
<td>10/09/2005</td>
</tr>
<tr>
<td>✔</td>
<td>mother billiards</td>
<td>10/02/1970</td>
</tr>
<tr>
<td>✔</td>
<td>sister billiards</td>
<td>02/10/2001</td>
</tr>
</tbody>
</table>

**Explanation for Case Split**

- Enter the following in the Explanation for Case Split text field:
  - Participants should be in a separate case.

**Maintain Case Page**

- Click the Continue button.
- Click the Save button.

### DO THIS...

23. Uncheck all but two participants, thereby splitting off two participants from the existing case.

### EXPLAIN...

- **Note:** The checkboxes for all active participants, within the Case Participants group box, default to checked.

- **Note:** When splitting cases, there must be one active participant remaining in the originating case.

24. Enter the following in the Explanation for Case Split text field: Participants should be in a separate case.

- **Note:** The information entered is displayed.
- **Note:** In the “Explanation for Case Split” text field add a note to update the Case Name.

25. Click the Continue button.

- **Note:** The new Maintain Case page is displayed with the selected participants displayed in the Participants group box, on the Participants tab.

26. Click the Save button.

- **The new Maintain Case page is saved and information stored in the FSFN database.**
- **Note 1:** If the new Maintain Case page is closed without saving, the split case process will not have occurred.
- **Note 2:** Upon saving the new Maintain Case page, the participant(s) will become de-activated in the originating case.
- **Note 3:** The address in the new case will default to the Case Address from the originating case. The Case Address that pre-fills from the originating case will be displayed on the address tab as the Primary, but the worker can create a new address in the new case to update it, and the address that pre-filled will become historical. The Family Structure in the new case will always default to ‘Unable to
Determine. Case Name, Legal Status, Service Roles, County and Case Type will all pre-fill in the new case from what is in the originating case. All the remaining fields in the new case will remain blank until/unless the worker updates them.

- **Note 4**: The new, split case will have a Split Case designation in the Case header group box.

- **Note 5**: Upon selecting Continue, and subsequently saving the newly created case, the system will automatically transpose the narrative, documenting the reason for the case split, into a case note. The Case Note will be given a note type of ‘Case Split,’ have the narrative captured on the ‘Split Case Participant Selection’ page, and have a ‘Start Time’ of when the Save was successfully initiated and processed on the newly created case.

27. Click the **Close** button. The desktop is displayed.
### Maintain Case Page

When a child has been adopted, and needs to be placed in a new Post Adoption Services case, the worker is able to perform the Create New Case after Finalization process in order to create a new family case.

- **Do Not Do This Step Until You Complete the Following:**
  - a. End Date child’s current placement for the reason of Adoption Finalization.
  - b. Deactivate the child for reason of Adoption Finalization.
  - c. Create an Adoption Subsidy Agreement Information page.
  - d. IV-E Adoption Eligibility record that has been approved.
  - e. If a TANF exists for the child, it must be approved.

- **Note:** In addition to the steps below, please refer to the workflow for further reference.
  1. When paid placement is approved, Title IV-E Eligibility determination page is created by the system. Fiscal Worker document information in this page.
  2. Case Worker complete Foster Care...
2. Case Worker complete Foster Care Rate Setting Page- Step133-174.
3. When a child is ready for Adoption, Case Worker create Adoption Subsidy Agreement Page.
4. Adoption Eligibility Page is created by the system.
5. Adoption Eligibility Page is completed by the Fiscal Worker.
6. If the Child is deemed ineligible, TANF page created by the system. This page is completed by the Fiscal Worker.
7. Case Worker end OHP for the reason of Adoption Finalization.

- The worker can choose to either place the child in an existing case or create a new case. This is to accommodate situations where a sibling was already placed with the same Adoptive family, and the worker wishes to place this child with that same family. If there is not an existing case to place the child in, the user can select the Create button to create a new FSFN Post Adoption Services case.

- Only children that were in the same, most recent Out of Home Placement can be placed in the same Post Adoption Services case when performing the Create New Case after Finalization functionality.

29. From the desktop, launch the Maintain Case page, of a FSFN Case, for which there is a child that meets the identified criteria.

- The Maintain Case page is displayed.

30. From the Options dropdown, select Create New Case after Finalization pop-up page is displayed.
CREATE NEW CASE AFTER FINALIZATION

Finalization and select the Go button.

31. Select the checkbox(es) for the applicable child(ren).

32. Click the Create button.

The checkbox(es) are displayed as checked.

The Maintain Case page, for the Post Adoption Services case, is displayed.

33. Click the Save button.

The new Post Adoption Services case is displayed.

**Note 1:** If the new Maintain Case page is closed without saving, the Create New Case after Finalization process will not have occurred.

**Note 2:** Upon saving the new Post Adoption Services case, the child(ren) selected to move are de-activated in the originating case and CANNOT be re-activated in the originating case.

**Note 3:** Upon saving the new Post Adoption Services case, the following fields are system derived when creating a new case: the Case Name defaults to the most recent Provider Name; the Case Type defaults to Post Adoption Services; the Family Structure defaults to 'Unable to Determine'; the County is the County of the Provider; and the child(ren) selected to move are given a new person ID, and their names are displayed on the Participant's tab as hyperlinks.

**Note 4:** Upon saving the new Post Adoption Services case, the following pieces of work are copied over to the new case: Medical/Mental Health record; Education record; Adoption Subsidy Agreement Information page (includes the Adoption Assistance Agreement launched from the page); Adoption Eligibility record;
**Do This...**

34. Click the **Close** button.

35. Refresh the desktop and drill down on the Cases expando.

**Explain...**

- **TANF Adoption Eligibility** (if applicable); and **Title IV-E Foster Care Eligibility**.
- **Note 5**: Upon saving the new Post Adoption Services case, the following information is copied over to each of the new, respective Person Management records: All information on the Basic tab; all information on the Disability/AFCARS tab; and Client Characteristics on the Additional tab, as documented in the Reporting Information group box.

The desktop is displayed.

The new, Post Adoption Services case is displayed.

**Note**: An indicator is displayed in the Case Name hyperlink, in parenthesis, indicating the Pre-Adoptive Case ID. The same is conversely true when viewing the Case Name hyperlink, for the originating case. It contains the Post-Adoptive Case ID in parenthesis.
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