

# **CASE TRANSFER STAFFING**

## **USER GUIDE**

# CASE TRANSFER STAFFING – USER GUIDE

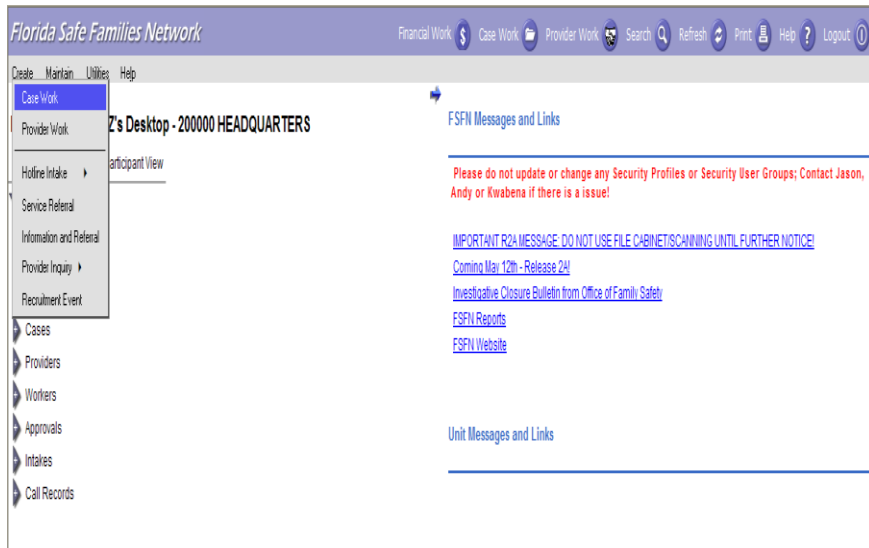
## FUNCTIONALITY ADDRESSED:

- This guide outlines the steps to perform key tasks to document **Case Transfer Staffing**.

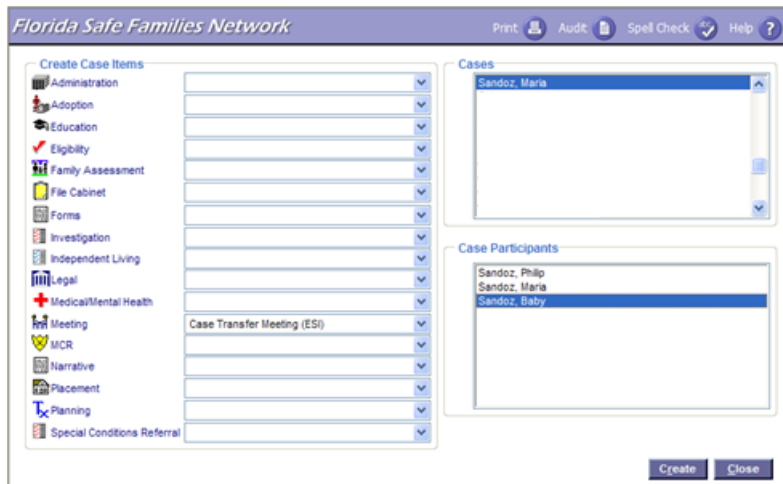
## LEARNING OBJECTIVES:

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

- Document date and time the Ongoing Services Unit accepted the Case Transfer Staffing packet.
- Understand tickler generation timeframe.



DESKTOP



CREATE CASE WORK PAGE

1. Review relevant **scenario** information.

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

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3. Select **Case Work** from the dropdown menu.

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4. From **Create Case Items, Meetings**, select **Case Transfer Meeting (ESI)**.

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5. From the **Cases** group box, select the **<YOUR NAME>** case.

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6. From the **Case Participants** group box, select the **<NAME OF PARTICIPANT>** then the **Create** button.

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HEADER GROUP BOX

7. Review the Meetings page.

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MEETING SESSION DETAILS

**TIPS AND 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.

<p>8. Review <b>Meeting Session Details</b> group box.</p>	<hr/> <hr/> <hr/> <hr/>
<p>9. In the <b>Scheduled Date</b> field, enter <b>2 weeks past from today's date.</b></p>	<hr/> <hr/> <hr/> <hr/>
<p>10. In the <b>Start Time</b> field, enter <b>10:00 AM.</b></p>	<hr/> <hr/> <hr/> <hr/>
<p>11. In the <b>End Time</b> field, enter <b>11:30 AM.</b></p>	<hr/> <hr/> <hr/> <hr/>
<p>12. In the <b>Location</b> field, enter <b>Crossroads Junior High School.</b></p>	<hr/> <hr/> <hr/> <hr/>
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**MEETING ISSUES/STATEMENTS**

**MEETING REQUEST DETAILS**

13. Review <b>Meeting Issues/Statements</b> group box.	
14. Enter “ <b>Family Update, Child Custody</b> ”.	
15. Review <b>Meeting Request Details</b> group box.	
16. In the <b>Meeting Request Details</b> , click on the <b>Person</b> hyperlink.	
17. In the <b>Last Name</b> field, type <b>Smith</b> and click the <b>Search</b> button.	
18. Select the first Smith available and click the <b>Continue</b> button.	
19. Click the <b>Case Participant</b> hyperlink.	
20. Click the <b>Close</b> button.	

Florida Safe Families Network

Type: Case Transfer Staffing (ESI) Subject: Maria Sandoz  Cancel Meeting  
 Meeting Lead: PETER C. HORWITZ Worker Subject Participant: Baby Sandoz  Meeting Completed  
 Case Accepted

Document Meeting Participants

Meeting Session Details  
 Check here if session cancelled  
 Scheduled Date: 00/00/0000 Start Time: 00:00 AM PM End Time: 00:00 AM PM  
 Location:

Meeting Issues/Statements

Meeting Request Details  
 Requested By: Person Case Participant Request Date: 00/00/0000

**Case Transfer Staffing Acceptance**  
 Date Accepted:  Time Accepted:  AM PM

Options:

**CASE TRANSFER STAFFING ACCEPTANCE**

Florida Safe Families Network

Type: Case Transfer Staffing (ESI) Subject: Maria Sandoz  Cancel Meeting  
 Meeting Lead: PETER C. HORWITZ Subject Participant: Baby Sandoz  Meeting Completed  
 Case Accepted

Document Meeting Participants

Meeting Session Details  
 Check here if session cancelled  
 Scheduled Date: 08/12/2008 Start Time: 09:00 AM PM End Time: 10:00 AM PM  
 Location: Building 3 - Room 300











Meeting Issues/Statements  
 Baby Sandoz Adoption

Meeting Request Details  
 Requested By: Request Date: 00/00/0000

Case Transfer Staffing Acceptance  
 Date Accepted: 08/15/2008 Time Accepted: 09:00 AM PM

Options:

21. Review **Case Transfer Staffing Acceptance** group box.
22. In **Date Accepted** field, enter a **08/15/2008**.
23. In **Time Accepted** field, enter **09:00 AM**.
24. Select **Meeting Completed** Checkbox and Click **Save**.
25. Verify the Meetings page is **view-only** except for **Case Transfer Staffing Acceptance** and **Case Accepted** checkbox fields.
26. Select the **Case Accepted** Checkbox and click **Save**.
27. Verify the Meetings page is frozen.

<p> <a href="#">Sandoz, Maria ( 130001007 )</a> <a href="#">Actions</a></p> <p>Investigation 08/12/2008 HORWITZ, PETER C Brevard , Bagdad, FL</p> <p> Related People</p> <p> Intakes</p> <p> Assignment</p> <p> Forms</p> <p> Income/Eligibility</p> <p> Legal</p> <p> Meeting</p> <p> <a href="#">Case Transfer Staffing (ESI) 08/16/2008 (Sandoz, Baby)</a></p> <p> Placement/Services</p>	<p>28. Refresh the Desktop and click the <b>Meeting</b> icon.</p>	<hr/> <hr/>
<p>29.</p>	<hr/> <hr/>	