Child Welfare Pre-Service Training

Assessment FSFN Computer Instruction

Trainer Guide

July 2012
PLEASE NOTE

Access to FSFN person or case information must only occur when there is a legitimate business purpose. FSFN must not be used to access any of the following:

- Persons or cases in the news, or
- Persons or cases about which you are “curious”, or
- Persons or information about your own personal case, or
- Persons or cases of family members, or
- Persons or cases of friends, neighbors or acquaintances, or
- Any other persons or cases for which there is no legitimate business reason for you to access the information.

Please use common sense when accessing FSFN; if you have any questions about the appropriate use of FSFN, please contact your supervisor and/or your agency’s IT Support personnel.

The materials for the Child Welfare Pre-Service Training curriculum were produced by Florida International University for the State of Florida, Department of Children and Families, Office of Family Safety.

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Icon Key

- Time estimate
- Additional Readings / Resources
- Flip Chart
- Discussion
- Activity
- PowerPoint Presentation/PPT
- Handout

Trainer Tips

- Materials
- Webpage
- Video

Participant Guide pages inserted in Trainer Guide
To The Trainer

During the FSFN Assessment Computer course, learners practice documentation using a case from the Assessment classroom course. Case note narratives used in the course reinforce classroom emphasis upon quality documentation. Learners are also exposed to provider notes.

Goals

Following the FSFN Assessment Computer course, learners will be able to:

• Create, edit, view and print case notes.
• Create a provider note.

Knowledge Base Competencies

The following Case Management (CM) Knowledge Base Competencies (organized by domain) are addressed in Assessment FSFN:

Professional and Legal Responsibilities, Documentation Requirements:

• K24. The importance of timely, accurate case documentation for agency accountability.
• K25. Multiple types, purposes, and uses of case documentation.
• K26. Benefits of formally documenting the case plan in the case record.

The following Protective Investigations (PI) Knowledge Base Competencies (organized by domain) are addressed in Assessment FSFN:

Child Protection Foundations:

• K21. Knowledge of the types and purposes of information and required timeframes for documentation in the electronic investigative file (e.g., TANF, ICWA, etc.).

Planning and Teaming:

• K46. Knowledge of the role of the protective investigator to have primary responsibility for gathering, assessing, understanding, integrating, documenting, and communicating critical information throughout the investigation to all essential parties in order to ensure informed decision making.

Course Objectives

• Create FSFN Case Notes.
• Learn how to edit and view notes.
• Print a note or note report.
• Create a Provider Note.

Training Materials

Participant Handouts

♦ PG1-3 Assessment Case Study
♦ PG4-9 Step by Step Guide: Create FSFN Case Notes
♦ PG9 Step by Step Guide: Edit and View Notes
♦ PG10 Step by Step Guide: Print a Note or a Note Report
♦ PG 11 Step by Step Guide: Create Provider Notes
♦ PG12-17 Example Case Notes

Visual Aids

Overheads

♦ PPT1 Assessment FSFN
♦ PPT2 Objectives
♦ PPT3 FSFN Case Notes
♦ PPT4 Provider Notes
FSFN Case Notes

Topic ~ Create FSFN Case Notes

Materials

♦ PG1-3  Assessment Case Study
♦ PG4-9  Step by Step Guide: Create FSFN Case Notes
♦ PG9   Step by Step Guide: Edit and View Notes
♦ PG12  Family Case Notes
♦ PG13-14  Chronological Notes Reports
♦ PPT1  Assessment FSFN
♦ PPT2  FSFN Case Notes Objectives
♦ PPT3  FSFN Case Notes

• Display PPT1: Assessment FSFN and PPT2: Objectives

Advise class that you they will now learn the FSFN functionality and policy in relation to documenting case notes. Both CMs and PIs must create case notes. Case Notes are completed by the PI prior to case transfer which is demonstrated in this course. The PIs are taught how to create Investigative Notes in Investigative Response FSFN.

• Display PPT3: FSFN Case and Investigation Notes

Refer the class to PG1-3, Assessment Case Study. (PG page inserted on the following page TG3-5)

Refer the class to PG4-6, Create FSFN Case Notes. (PG page inserted on
Create and Expand a Note (PG4-6)

- Select the Actions hyperlink next to the FN1, Jacqueline (AD) case name:
- Select the Create Case Note.
- Select Continue. You are now ready to document the details of the narrative note.
FSFN Case Notes

Assessment Case Study

FN1, Jacqueline

Background:
An intake is received at the hotline on 11/04/2008 at 8:10 a.m. regarding the FN1 family. The intake is a 24 hour response priority and alleges the following: “Today Samantha collapsed on the playground and was complaining of chest pains. For the last two months Samantha has had a low grade fever, wheezing, and a bad cough.” There are no prior reports and the mother has no criminal history.

In-Home Investigation:
1. On 11/04/2008 at 9:45 am: PI arrived at Cherry Hill Elementary School to attempt to interview Samantha (age 11) and the other children in the family. The PI spoke to the school guidance counselor, Nancy Young, who confirmed that Samantha was complaining of chest pains and collapsed on the playground yesterday. Ms. Young stated that for at least two months Samantha has had a low grade fever, wheezing, and a bad cough. Samantha reportedly told her that she had not been to the doctor in quite some time. She reported that Samantha was examined by the school nurse after she complained of chest pains and the nurse was concerned that Samantha might have pneumonia. Ms. Young stated that she also has concerns for Samantha’s siblings (Marcus 10, Silvia 8, and Leonard 6). She stated last school year the children were often absent (Samantha 25 days, Marcus 28 days, Silvia 22 days, and Leonard 18 days) and the pattern has continued into this school year. The children have already missed four days of school in the first month. She said the children are not dressed appropriately for the weather. Last January it was in the 30’s and the children came to school in sandals and light sweaters. The children often come to school hungry and staff have given them food or money to buy their breakfast and lunch. Although they appear eligible for the free lunch program, the mother has not sent back the paperwork. Marcus has developed a severe behavioral problem and is being referred for ESE (Exceptional Student Education) services, but the mother has failed to come in to sign authorization for testing. Silvia often stays on school grounds well after school is out and her mother doesn’t come until the school calls numerous times. Leonard often cries in school without explanation. Ms. Young stated that yesterday they made numerous attempts to contact the mother to pick up Samantha and they finally had to call 911 when she collapsed on the playground. She stated the teachers, principal, and she have all tried to contact Ms. FN1 with limited success. She reports that Samantha is not in school today but the other children are present.
2. 11/04/2008 at 10:20 am: PI spoke with Marcus in the guidance office. Marcus' appearance was slightly disheveled as his clothing was dirty and food stained and his hair was uncombed. Marcus reported that he hates school because the other kids make fun of him for being poor and dirty, calling him "Mucky Marcus." He stated that is why he misses school a lot and also because sometimes they just miss the bus. Marcus has a hard time concentrating, but states since Samantha has been sick he has been cooking for and watching after his siblings. He states he cooked macaroni and cheese for dinner last night and "didn't burn the pot this time." Marcus reported that his mother is usually asleep when they leave for school in the morning and also when they get home in the afternoon and only sometimes gets up before they go to bed. He stated that his mother will yell at them if they try to wake her.

3. 11/04/2008 at 10:35 am: PI spoke with Silvia in the guidance office. Silvia was also disheveled with stained clothing and matted hair. Silvia stated that she likes to stay late after school because the teachers give her snacks and there is not much to eat in her house. She stated that her mom has not gone to the store in a couple of weeks, nor has she washed their clothes, because she sleeps all day. She stated that Marcus and Sam cook for them, but Marcus has been doing most of the cooking lately because Sam has been sick. She said, "Sam got real sick yesterday and the ambulance had to take her to the hospital." Silvia stated that her mom called the hospital last night but they didn't get to go see Sam because her mom was tired. She stated they miss school a lot because they miss the bus and their mom won't get up to take them to school.

4. 11/04/2008 at 10:55 am: PI spoke with Leonard in the guidance office. Leonard was wearing clothing that was dirty and food stained and his hair was uncombed. When the PI introduced himself to Leonard, Leonard began to cry. He said that he didn't want to be taken away from his mother and siblings. He reported that the other children make fun of him for being dirty and his mom hasn't washed his clothes because she sleeps all the time. Leonard stated that his siblings do most of the cooking at home.

5. 11/04/2008 at 1:10 pm: PI went to County General Hospital for an update on Samantha's condition and to interview Samantha. PI spoke to head nurse, Maria Sanchez. Nurse Sanchez reported that when Samantha was admitted she had a 103° temperature and was extremely dehydrated. She reported that Samantha has a severe case of pneumonia and she was being given IV antibiotics and fluids. Nurse Sanchez reported that Samantha otherwise appeared to be a healthy 11 year old. She stated they are going to keep Samantha overnight for observation.

6. 11/04/2008 at 1:15 pm: PI spoke with Samantha in her hospital room. Samantha reported that she was feeling a little better. She reported that she has had a cough for about two months and a slight fever for at least a month. She stated that she told her mother about it, but her mom just gave her some "Tussin" a few times and said it would go away on its own. Samantha asked how her siblings were and wanted to know how long she would be in the hospital because she had to get back home to "feed them supper." She stated that she is typically the one to cook and get her siblings ready for school, but that Marcus has been helping out more since she has been sick. Samantha said that her mom just sleeps all the time and that it has been like that since their father left a year ago. Samantha said that was really hard on her mother so she had to start doing some of the housework that her mother used to do. She stated that her mother has not been grocery shopping or done laundry in a few weeks. She stated that there were no other adults in their home that could help out and that they didn't have any friends or family that could help either.
7. 11/04/2008 at 2:35 pm: PI went to the family home and knocked on the door numerous times before the mother, Jacqueline FN1, came to the door. The mother was wearing a tattered night gown and her hair was uncombed. It appeared as though she had just woken up. The mother was withdrawn but answered the PI’s questions. According to the mother, she was receiving Food Stamps and Temporary Cash Assistance, but her benefits were cut last month. She also does a few odd jobs for cash. She said “we get by.” The food in the home was limited to crackers, cereal, and some canned goods. Ms. FN1 reported that she hadn’t been able to go grocery shopping this month. She stated that this was all Mr. FN1’s fault because he left them and he used to support the family. Ms.FN1 stated that she knew Samantha was sick but that she just thought it was a persistent cold and would eventually go away with some cold medicine. The PI discussed the available services with the mother who agreed to Judicial In-Home Services and said she just wanted to get her life “back on track.” The home was dirty and cluttered but generally safe.


9. Findings:

Medical neglect of Samantha, age 11
Environmental Hazards for all the children (inadequate food and clothing)
Inadequate Supervision for Leonard, age 6 and Silvia, age 8
Create FSFN Case Notes

Create and Expand a Note

Click the Cases Expando

Select the Actions hyperlink next to case name

Select Create Case Note

Click Continue

You are now ready to document the details of the narrative notes

Go to the Note Information group box

Select/multi-select Case Participant names from the Case Participant group box

Enter contact begin date/time

OR

Right Click in the Date Field to access calendar.

Enter Date with no slashes or dashes

Enter the contact end date/time

Select Case in the Category dropdown box

Select Staffing-Case Transfer/ESI from the Type dropdown box
Create FSFN Case & Investigation Notes

Enter the following narrative in the narrative text box:

PI attended the case transfer/ESI staffing. The PI, PI supervisor, Staffing Coordinator, CLS attorney and CM supervisor were all present. The investigation verified the following maltreatments: medical neglect of 11 year-old Samantha FN1, environmental hazards for all the children (inadequate food and clothing), and inadequate supervision for the 6 and 8 year old children. As a result of the verified maltreatments the recommendation is Judicial In-Home Services. The PI completed a referral to Children’s Medical Services on 11/04/08 in order for the children to receive medical attention and an annual medical check up. The PI also made a referral for the children to receive clothing from the clothing bank on 11/04/08. The PI completed diligent searches on both fathers. Samantha was taken to the Broward General Hospital 11/04/08 for treatment of pneumonia and dehydration. She was admitted for treatment. She was prescribed medication and is scheduled to be released on the evening of 11/05/08. The following services were also addressed and require follow up by the Case Manager, Naomi Robinson, by the assigned dates:

- Refer mother for a mental health assessment by 11/05/08.
- Refer children for a mental health assessment by 11/05/08.
- Follow up on Samantha’s status in the hospital by 11/05/08 (954-965-4562).
- Visit mother and children in the home by 11/06/08.
- Develop the case plan and incorporate all recommendations from the mental health assessments by 11/20/08.
- Submit case plan to court no later than 11/23/08.
- Attend the disposition hearing on 11/26/08 at 1:30 pm.

Go to the Contact Information group box

Go to Other Contacts Sections and Click Insert. You can insert as many additional Other Contacts as necessary. You must complete all blue fields to save the note.

To Save the Note, Click Create

A new note window appears to add additional notes to the case.

Name: Diane Wallace
Affiliation: DCF
Title: PI Supervisor
Contact Time/Date: 11/05/2008 10:30 am

- Pop-up message “Do you wish to save your changes” appears
- Click Yes

Enter:
- Contact Begin date/time: 11/05/2008 1:10 pm
- Contact End date/time: 11/05/2008 2:15 pm
Create FSFN Case Notes

Select Case in the Category dropdown box.

- Type: Note to File-General
- Select ALL Case Participant Names
- Go to the Narrative text box and enter information

PI reviewed case file for accuracy. PI is now assigned as secondary worker and the Case Manager is the primary worker based on the case being accepted for services at the case transfer staffing. The PI will begin closing the investigation.

Click Save and Close

The FSFN Desktop displays

TO VIEW THE NOTE refresh the desktop

- Select the Cases expand
- Select the FN1, Jacqueline (AD) case
- Expand the Narrative Icon to review the notes just created

Create Note from Casework on the Banner Bar

Click Casework icon from the Banner Bar

Select Case from the Narrative Dropdown box

- Case group box: Select the FN1, Jacqueline (AD) case
- Case Participants box: Select ALL case participant names

Select Create

Enter:

- Contact Begin date/time: 11/05/2008 1:45pm
- Contact End date/time: 11/05/2008 2:10pm
- Category dropdown box: Select Case
- Type dropdown box: Select Telephone Contact
- Enter the narrative on following page
• Direct class to the Case Note group box.

The OTHER checkbox is used when the person who performed the note contact person is different than the person entering the note.

• Demonstrate the Case Name, Worker Creating the Note, Worker Making Contact, Case Note ID, Date Entered and Other Checkbox.

The Case Note ID and Date Entered populates when the note is saved. The Case Name, Worker Creating Note and Worker Making Contact are all prefilled.

• Direct class to the Note Information group box.

➢ Select or multi select Case Participant names from the Case Participant group box.

FSFN Case Narratives

➢ Enter the contact begin date/time 11/05/2008 10:30am.

Right Click in the Date Field to display the calendar. Enter date with no slashes or dashes.

➢ Enter the contact end date/time 11/05/2008 11:00am.

The note contact END date/time are optional fields; however, best practice has learners enter a begin and end date and time.

➢ Select Case in the Category dropdown box.

➢ Select Staffing - Case Transfer/ESI from the Type dropdown box.

Case notes are created by both PIs and CMs. The Inv/Assessment Number dropdown box is only applicable when PIs are creating Child Investigation Notes. When PIs create Investigative Notes, they will attach the note to the Investigation Number. Worker activity code is an optional field for CM and is not applicable for PIs.

➢ Direct class to the Narrative text box and have them enter the narrative on the following page.

An example of this case note is also provided on PG12, FN1, Jacqueline Family Case Note. ⭐️ (PG page inserted on the following page TG11)
PI attended the Case Transfer/ESI staffing. The PI, PI supervisor, Staffing Coordinator, CLS attorney and CM supervisor were all present. The investigation verified the following maltreatments: medical neglect of 11 year-old Samantha FN1, environmental hazards for all the children (inadequate food and clothing), and inadequate supervision for the 6 and 8 year old children. As a result of the verified maltreatments the recommendation is Judicial In-Home Services. The PI completed a referral to Children's Medical Services on 11/04/2008 for the children to receive medical attention and receive an annual medical checkup. The PI also made a referral for the children to receive clothing from the clothing bank on 11/04/2008. The PI completed diligent searches on both fathers. Samantha was taken to Broward General Hospital on 11/04/2008 for treatment of pneumonia and dehydration. She was admitted for treatment. She was prescribed medication and is scheduled to be released on the evening of 11/05/2008. The following services were also addressed and require follow up by the Case Manager, Naomi Robinson, by the assigned dates:

- Refer mother for a mental health assessment by 11/05/2008.
- Refer children for a mental health assessment by 11/05/2008.
- Follow up on Samantha’s status in the hospital by 11/05/2008 (954-965-4582).
- Visit mother and children in the home by 11/06/2008.
- Develop the case plan and incorporate all recommendations from the mental health assessments by 11/20/2008.
  - Submit case plan to court no later than 11/23/2008.
  - Attend the disposition hearing on 11/26/2008 at 1:30 pm.
Family Case Notes

Chronological Notes Report

Case Name: FN1, Jacqueline  
Note ID: Auto populates after saving  
Worker Creating Note: Learner's User Name  

Case ID: xxxxx  
Date Entered: Auto Populates after saving  
Worker Making Contact: Learner's User Name

Note Information

Contact Begin Date: 11/05/2008 10:30AM  
Category: Case  
Worker Activity Code: N/A  
Safety: N Safety Resolved: N  
FSFN: N FSFN Resolved: N  
Admin: N Admin Resolved: N

Contact End Date: 11/05/2008 11:00AM  
Type: Staffing - Case Transfer/ESI  
No Request for Action: N  
Safety date: Safety Resolution:  
FSFN date: FSFN Resolution:  
Admin: Admin Resolved:

Contact Information

Subjects Contacted:

Other Subjects

Diane Wallace DCF PI Supervisor 11/05/2008 10:30am

Narrative:

PI attended the Case Transfer/ESI staffing. The PI, PI supervisor, Staffing Coordinator, CLS attorney and CM supervisor were present. The investigation verified the following maltreatments: medical neglect of 11 year-old Samantha FN1, environmental hazards for all the children (inadequate food and clothing), and inadequate supervision for the 6 and 8 year old children. As a result of the verified maltreatments the recommendation is Judicial In-Home Services. The PI completed a referral to Children’s Medical Services on 11/04/08 in order for the children to receive medical attention and an annual medical checkup. The PI also made a referral for the children to receive clothing from the clothing bank on 11/04/08. The PI completed diligent searches on both fathers. Samantha was taken to the Broward General Hospital 11/04/08 for treatment of pneumonia and dehydration. She was admitted for treatment. She was prescribed medication and is scheduled to be released on the evening of 11/05/08. The following services were also addressed and require follow up by the Case Manager, Naomi Robinson, by the assigned dates:

- Refer mother for a mental health assessment by 11/05/08.
- Refer children for a mental health assessment by 11/05/08.
- Follow up on Samantha’s status in the hospital by 11/05/08 (954-665-4582).
- Visit mother and children in the home by 11/06/08.
- Develop the case plan and incorporate all recommendations from the mental health assessments by 11/20/08.
  - Submit case plan to court no later than 11/23/08.
  - Attend the disposition hearing on 11/26/08 at 1:30 pm.
• Direct the class to the Contact Information group box.
• Direct class to the Other Contacts section.
  ➢ Click Insert.

Additional Other Contacts may be entered as necessary.

➢ Enter Diane Wallace in the Name field.
➢ Enter DCF in the Affiliation field.
➢ Enter PI Supervisor in the Title field.
➢ Enter 11/05/2008 10:30 am in the contact date/time field.

All blue fields must have the required information in order for the note to be saved successfully.

➢ Click Create. A pop up message “Do you wish to save your changes?” appears.
➢ Click Yes.

The previous note is saved and a NEW note window appears for creation of a new note.

CREATE is used to create more than one note on the same case.

➢ Advise class that more notes are created on the FN1, Jacqueline case later in the course.
  ➢ Enter the contact begin date/time 11/05/2008 1:10pm.
  ➢ Enter the contact end date/time 11/05/2008 2:15pm.
  ➢ Select Case in the Category dropdown box.
  ➢ Select Note to File - General in the Type dropdown box.
  ➢ Select ALL Case Participant Names.
• Direct class to the Narrative text box and have them enter this narrative:

An example of this case note is provided in PG6, Create FSFN Case Notes. *(PG page inserted on the following page TG14)*
PI reviewed case file for accuracy. PI is now assigned as the secondary worker and the Case Manager is the primary worker based on the case being accepted for services at the case transfer staffing. The PI will begin closing the investigation.

- An example of this case note is also provided on PG13, FN1, Jacqueline Family Case Note.
- Direct the class to the Contact Information group box.
  - Click Save and Close, returning the class to their FSFN Desktop.
- Advise class to refresh their Desktop.
  - Expand the Cases Expando.
  - Expand the FN1, Jacqueline (AD) Case.
  - Expand the Narrative Icon to review the created notes.

Refer class to PG6-7, Create FSFN Case Notes. *(PG page inserted on the following page TG14-15)*

Create a Note from Casework on the Banner Bar (PG6-7)

- Click the Casework Icon from the Banner Bar.
- Select Case from the Narrative Dropdown box.
- Select FN1, Jacqueline (AD) case from the Cases group box.
- Select ALL Case Participants from the Case Participants group box.
- Select Create.
Create FSFN Case Notes

Select Case in the Category dropdown box.

- Type: Note to File-General
- Select ALL Case Participant Names
- Go to the Narrative text box and enter information

PI reviewed case file for accuracy. PI is now assigned as secondary worker and the Case Manager is the primary worker based on the case being accepted for services at the case transfer staffing. The PI will begin closing the investigation.

Click Save and Close

The FSFN Desktop displays

TO VIEW THE NOTE
refresh the desktop

- Select the Cases expando
- Select the FN1, Jacqueline (AD) case
- Expand the Narrative Icon to review the notes just created

Create Note from Casework on the Banner Bar

Click Casework icon from the Banner Bar

Select Case from the Narrative Dropdown box

- Case group box: Select the FN1, Jacqueline (AD) case
- Case Participants box: Select ALL case participant names

Select Create

- Contact Begin date/time: 11/05/2008 1:45pm
- Contact End date/time: 11/05/2008 2:10pm
- Category dropdown box: Select Case
- Type dropdown box: Select Telephone Contact
- Enter the narrative on following page
Create FSFN Case Notes

Case Manager telephoned the PI (654-559-2204) to discuss case details. The PI stated that the children's maternal grandmother resides in Kentucky. Ms. FN1 and the children only speak to the grandmother around the holidays. Ms. FN1 advised PI that the children's grandfather died approximately 10 years ago. Ms. FN1 also advised that she also has a sister who resides in Kentucky. Her sister has never met the children, and there are no other known relatives. The PI reported that the grandmother and sister were contacted and provided very little information. Ms. FN1's mother said that she only hears from her daughter on holidays and that she has little knowledge of her daughter's family life. The PI stated that Samantha will be released from Broward General tonight and the PI was scheduled to meet the mother at the hospital for the discharge.

Go to Other Contacts section & Click Insert
- Name: Ray Charles
- Affiliation: DCF
- Title: Child Protection Investigator
- Contact Time/Date: 11/05/2008 1:45pm

Select Create to save changes
- Pop-up message "Do you wish to save your changes" appears
- Click Yes

Enter another case note
- Contact Begin date/time: 11/05/2008 9:45pm
- Contact End date/time: 11/05/2008 10:10pm
- Category dropdown box: Select Case
- Type dropdown box: Select Telephone Contact
- Case Participants box: Select FN1, Samantha (AD) and FN1, Jacqueline (AD)
- Enter a narrative

Telephoned Broward General Hospital to follow-up on Samantha's condition (654) 965-4582. The nurses' station (Candice Styler) reported that Samantha was released to her mother at 8:45 pm. She advised that PI Ray Charles was also present for the discharge. The nurse stated that Samantha's vitals had been checked and were positive. Her discharge instructions are to continue drinking fluids to maintain hydration and to ensure that all of the 2 week z-pack pills are taken for the pneumonia. CM requested a copy of Samantha's hospital records and provided the CM's mailing address to the nurse.

Go to Other Contacts section & Click Insert
Name: Candice Styler
- Affiliation: Broward General Hospital
- Title: Discharge Nurse
- Contact date/time: 11/05/2008 9:45pm

Select Create to save changes
- Pop-up message "Do you wish to save your changes" appears
- Click Yes
• Direct learners to the Note Information Group box.
   Enter the contact begin date/time 11/05/2008 1:45pm.
   Enter the contact end date/time 11/05/2008 2:10pm.
   Select Case in the Category dropdown box.
   Select Telephone Contact in the Type dropdown box.

• Direct class to the Narrative text box and have them enter this narrative:

  An example of this case note is also provided on PG14, FN1, Jacqueline Family Case Notes.

Case Manager telephoned the PI (954-559-2204) to discuss case details. The PI stated that the children’s maternal grandmother resides in Kentucky. Ms. FN1 and the children only speak to the grandmother around the holidays. Ms. FN1 advised PI that the children’s grandfather died approximately 10 years ago. Ms. FN1 also advised that she has a sister who also resides in Kentucky. Her sister has never met the children, and there are no other known relatives. The PI reported that the grandmother and sister were contacted and provided very little information. Ms. FN1’s mother said that she only hears from her daughter on holidays and that she has little knowledge of her daughter’s family life. The PI stated that Samantha will be released from Broward General tonight and the PI was scheduled to meet the mother at the hospital for the discharge.

• Direct the class to the Contact Information group box.
   Direct class to the Other Contacts section.
   Click Insert.
   Enter Ray Charles in the Name field.
   Enter DCF in the Affiliation field.
   Enter Child Protection Investigator in the Title field.
   Enter 11/05/2008 1:45pm in the contact date/time field.
   Select Create. A pop up message “Do you wish to save your changes?” appears.
   Click Yes.
   Enter the contact begin date/time 11/05/2008 9:45pm.
   Enter the contact end date/time 11/05/2008 10:10pm.
   Select Case in the Category dropdown box.
   Select Telephone Contact in the Type dropdown box.
   Select FN1, Samantha (AD) and FN1, Jacqueline (AD) from the Participant group box.
• Direct class to the Narrative text box and have them enter this narrative

*An example of this case note is also provided on PG15, FN1, Jacqueline Family Case Notes.*

Telephoned Broward General Hospital to follow-up on Samantha’s condition. (954) 965-4582. The nurses’ station (Candice Styler) reported that Samantha was released to her mother at 8:45 pm. She advised that PI Ray Charles was also present for the discharge. The nurse stated that Samantha’s vitals had been checked and were positive. Her discharge instructions are to continue drinking fluids to maintain hydration and to ensure that all of the 2 week z-pack pills are taken for the pneumonia. CM requested a copy of Samantha’s hospital records and provided the CM’s mailing address to the nurse.

• Direct the class to the Contact Information group box.
• Direct class to the Other Contacts section.
  ➢ Click Insert.
  ➢ Enter Candice Styler in the Name field.
  ➢ Enter Broward General Hospital in the Affiliation field.
  ➢ Enter Discharge Nurse in the Title field.
  ➢ Enter 11/05/2008 9:45pm in the contact date/time field.
  ➢ Select Create. A pop up message “Do you wish to save your changes?” appears.
  ➢ Click Yes.

*Refer learners to PG8-9, Create FSFN Case Notes.* *(PG page inserted on the following page TG19-20)*

**Enter a Face-To-Face Home Visit Narrative Note (PG8-9)**

➢ Enter the contact begin date/time 11/06/2008 3:00pm.
➢ Enter the contact end date/time 11/06/2008 4:00pm.
➢ Select Case in the Category dropdown box.
➢ Select Home Visit - Child’s Current Residence in the Type dropdown box.
➢ Select All Case Participants from Participant group box.
➢ Select the hyperlink below the participant group box “Add Face-to-Face Contacts.”
• Direct class to the Narrative text box and ask them to enter this narrative:

*An example of this case note is provided on PG16, FN1, Jacqueline Family Case Note.*
• Direct the class to the **Contact Information** group box.
  ➢ Select Completed in the Face-to-Face Contact dropdown box for **FN1, Samantha and Jacqueline FN1**.
  ➢ Enter the contact begin date/time **11/06/2008 3:00pm**.
  ➢ Select Not Attempted in the Face-to-Face Contact dropdown box for **Silvia, Marcus and Leonard**.
  ➢ Select **Not at Home**, for the **Reason Not Seen**.
  ➢ Click **Save** and **Close** to return class to their **FSFN Desktop**.

• Advise class to refresh their **Desktop**.
  ➢ Expand **Cases Expando**.
  ➢ Expand the **FN1, Jacqueline (AD) Case**.
  ➢ Expand the **Narrative Icon** to review the created case notes.
Case Manager conducted initial contact as an announced home visit at the FN1 residence, 1450 NW 112 Ave, Ft. Lauderdale, FL 33301. The mother, Jacqueline FN1 was sleeping when this Case Manager arrived. At first she was hesitant to talk but eventually opened up. Interviewed Ms. FN1 and the following was determined:

Ms. FN1's second husband, the father of her two younger children, Silvia and Leonard, left her one year ago for another woman. Ms. FN1 has never worked and has managed to "get by" on welfare. She advised that she has no family and few friends in the area. She talks to the neighbor at times, but they are not close. She states she is "ashamed" to call her family, who live in another state, as this is the second time she has had a husband walk out. Ms. FN1 claims that all her children have been sick on and off throughout the winter, but she hasn't taken them to the doctor because "It's such an exhausting trip to spend the whole day at the clinic." Ms. FN1 has no car, and claims she used to take the bus to grocery shop, go to the laundry mat, pay bills, and other errands. She stated that she knows her way around the city and is comfortable using public transportation. When asked about her own health, she said it wasn't good. She reported having chronic headaches, no energy, stating she was "tired all the time". "...all I want to do is sleep." She states she has lost her appetite, and sometimes cannot even think about food. She feeds her children "whatever is easy - it's too much effort to cook." She saw a doctor approximately 6 months ago for a broken finger. She did not want to go back to the doctor, stating, "They'll think I am crazy. They'll lock me up, and then who will care for my children?" Ms. FN1 admits to crying bouts that last for hours at a time. She said she had these symptoms for about a year. They began shortly after her husband left the home.

Ms. FN1 was informed of the mental health assessment that she is scheduled to take on 11/08/07 at 10:00 am. Discussed with her that the children were also scheduled for their assessments on the same day. Referred Ms. FN1 to the food and clothing bank and provided her with telephone numbers and addresses.

The refrigerator contained minimal items such as milk, Kool-Aid, and water. The cupboards had minimal items such as bread, soup, and some crackers.

Ms. FN1 reported that Samantha was sleeping in bed (I looked in her bedroom to verify) and that Silvia, Marcus, and Leonard were in school. She provided the name of Samantha's doctor, Ronald Sinchak, 954-745-3952, 2457 Hay St., Ft. Lauderdale, FL. Ms. FN1 indicated that Samantha has a follow-up visit with the doctor on 12/2/07.
Create FSFN Case Notes

- In the Face-to-Face Contact dropdown box: Select Completed for FN1, Samantha (AD) and FN1, Jacqueline (AD)
- Contact Begin date/time: 11/06/2006 3:00 pm
- In the Face-to-Face Contact dropdown box: Select Not Attempted for Silvia, Marcus and Leonard
- Reason Not Seen: Not at home
- The FSFN Desktop Displays: Refresh desktop
- Expand the Cases Expando
- Expand the FN1 Case
- Expand the Narrative Icon to review the case note.

Edit and View Notes

Refresh Desktop, then expand the Cases Expando

Expand the Narrative Expando to view notes

Select the Blue Hyperlink for the Case Face to Face Note

Samantha received a Doctor's note from the hospital excusing her from school for the three day period of 11/6 - 11/8.

Click Save

To View Notes, find the Options dropdown box in the bottom left hand corner and select View History

To view the most recent version of a note, select View Note from the Options dropdown box

Print the Note, by selecting Print in the tool bar on the top of your computer screen.

- A word template launches displaying both version of the note that were created: the original note and the edited version
- Select Close and Return to FSFN from the word document
- A word template launches with the most recent note version
Topic ~ Edit and View Notes

Materials

♦ PG9  Step by Step Guide: Edit and View Notes

*The class must Refresh their desktop before beginning this activity.*

Refer class to PG9, Edit and View Notes.  (PG page inserted on the following page TG22)

➢ From the Desktop, expand the Cases Expando.
➢ Expand the FN1, Jacqueline (AD) Case.
• Direct class to the Narrative Icon that appears in the case.
  ➢ Expand the Narrative Expando to display the created notes.
  ➢ Select the blue hyperlink for the Case Face-to-Face note created for the contact with FN1, Samantha (AD) and FN1, Jacqueline (AD).
  ➢ In the narrative text box at the END of the narrative text, you will edit the note by entering this new information:

  Samantha received a Doctor’s note from the hospital excusing her from school for the three day period of 11/06/2008 - 11/08/2008.

  ➢ Click Save.
  ➢ From the Options dropdown box in the bottom left hand corner.
  ➢ Select View History.  Click Go.

A word template launches that displays BOTH versions of the note just created.  (The original note and the edited version.)

➢ Select Close and Return to FSFN from the word document.
• To view the note “as is” on the FSFN note window:
  ➢ Select View Note from the options dropdown box on the bottom left of the FSFN window.
  ➢ Click Go.

A note word template launches.

*FSFN Case, Investigation and Provider Note Templates have been updated; new categories have been added, due to FSFN functionality change.*
• To Print the note, select Print in the tool bar on the top of your computer screen.
Create FSFN Case Notes

- In the Face-to-Face Contact dropdown box: Select Completed for FN1, Samantha (AD) and FN1, Jacqueline (AD)
- Contact Begin date/time: 11/06/2009 3:00 pm
- In the Face-to-Face Contact dropdown box: Select Not Attempted for Silvia, Marcus, and Leonard
- Reason Not Seen: Not at home
- The FSFN Desktop Displays. Refresh desktop
- Expand the Cases Expando
- Expand the FN1 Case
- Expand the Narrative Icon to review the case note.

Edit and View Notes

- Refresh Desktop, then expand the Cases Expando
- Expand the Narrative Expando to view notes
- Select the Blue Hyperlink for the Case Face to Face Note
- Edit the note by entering the following text:
  
  Samantha received a Doctor's note from the hospital excusing her from school for the three day period of 11/6 - 11/8.

- Click Save

- To View Notes, find the Options dropdown box in the bottom left hand corner and select View History

- To view the most recent version of a note, select View Note from the Options dropdown box

- Print the Note, by selecting Print in the tool bar on the top of your computer screen.
Topic ~ Print a Note or a Note Report

Materials

- ♦ PG1  Print a Note or a Note Report

Refer class to PG10, Print a Note or a Note Report. *(PG page inserted 4on the following page TG24)*

- From the Desktop
- Click the Actions hyperlink to the right of the case name.
- Select Case Note Criteria Search.
- Click Continue.
- In the Note Criteria header select the Investigation # from the Inv/Assessment # dropdown box if applicable.

The Start and End date of the search defaults to 60 days.

- Direct class to adjust the dates to fit their note search.
  - Select Child Investigation and Case in the Category group box.
  - Select Add.

  This automatically selects all types. (At this point any notes that do not need to be printed can be unselected.)

  - Select All case participants in the case participants group box.

Hold the CTRL key down to multi select case participants.

- Click Search.

To view and print a single note, select the View hyperlink or Print hyperlink next to the individual note.

To view and print All notes for a Note Report, scroll down to the bottom of the page.

- Click Options.
- Select View All.
- Click Go.
Print a Note or a Note Report

From the Desktop

Select the Actions hyperlink to the right of the case name

Select the Case Note Criteria Search

• In the Note Criteria header select the Investigation # from the Invl/Assessment # dropdown box if applicable
• The Start and End date of the search defaults to 60 days
• Adjust the dates to fit your note search

• Select Add to automatically select all types. Unselect any notes that you do not want to print.
• Case Participants Group box: Select all case participants.
  Hold the CTRL key down to multi-select participants.
  Click Search

Click Continue

Select Child Investigation and Case in the Category group box

To view and print a single note

Select the View or Print hyperlink next to the individual note

To view and print ALL notes for a note report

Click Options
Select View All
Click Go
Policy

Review the documentation policies discussed during the Assessment course.

- FSFN user may create a case note for another user provided they log into FSFN using their unique and assigned user ID and password.
- No FSFN user must ever log into the system using another person’s ID or password.
- Documentation identifying the “worker making contact” must be clearly documented on the FSFN functionality screen and also in the case note narrative.
- Per DCF, hard copy cases do not have to include printed case notes; however, regions/circuits may require this extra level of documentation.

You must be aware of your region/circuit policy regarding the requirement of the hard copy files and inform the class at this time.

- The meeting function replaces the need to document the reason and outcome of meetings; however, there must be a brief note in the case notes that the meeting did occur and that additional information is found in the Meeting Notes.
Topic ~ Create a Provider Note

Materials

- PPT4 Provider Notes
- Display PPT4: Provider Notes

Refer the class to PG11, Create Provider Note. (PG page inserted on the following page TG27)

The Provider note will be created for the provider, Betty Boop. This provider is not affiliated with the Assessment Case Study. In this activity the learners will search the FSFN system for Betty Boop's provider record and create a provider note in search mode.

- In the Banner Bar, select Search.
- Select the Provider/Organization tab.
- Enter Boop in the Provider/Organization Name field.
- Enter Betty in the First name field.
- Select Search or Enter.
- In the Providers Returned Group Box, select the Actions hyperlink next to Boop, Betty's provider record.
- Select Create Provider Note.
- Select Continue.

The provider name, worker creating the note and worker making contact, pre-fill. The provider note ID and date entered automatically populates once the note is saved.
Create Provider Notes

1. In the Banner Bar
   - Select Search

2. Select the Provider/Organization tab
   - Enter Boop in the Provider/Organization Name Field
   - Enter Betty in the First Name Field

3. Select Search or Enter

4. In the Provider Returned Group Box
   - Select the blue Actions link next to Boop, Betty's provider record

5. Select Create Provider Note
   - The provider name, worker creating note and worker making contact pre-fill
   - The provider note ID and date entered auto populate once the note is saved

6. Select Continue

7. In the Note Information Group Box, enter the Contact Begin Date and Time
   - 04/01/2009 2:00pm

8. Enter Contact End Date and Time
   - 04/01/2009 2:30pm

9. In the Category dropdown box
   - Select Out-of-Home

10. In the Type dropdown box
    - Select Telephone Call

11. In the Narrative text box
    - Enter Case Manager received a phone call from foster parent Betty Boop, who needs to request respite services, May 18-19, while she attends a business conference associated with her job

12. Click Save

13. Click Close
➢ In the **Note Information Group Box**, enter the **Contact Begin Date** and **Time 04/01/2009 2:00pm**.

➢ Enter **Contact End Date** and **Time 04/01/2009 2:30pm**.

➢ Select **Out-of-Home** in the **Category** dropdown box.

➢ Select **Telephone Call** in the **Type** dropdown box.

➢ In the **Narrative** text box, enter this narrative:

> **An example of this case note is also provided on PG17, Provider Note.**

Case Manager received a phone call from foster parent, Betty Boop, who needs to request respite services on May 18-19, while she attends a business conference associated with her job.

➢ Click **Save**.

➢ Click **Close**.

> **The learners should still have the Search Window open and can view the note that was just created by Expanding Boop, Betty’s provider Icon and expanding the Narrative Icon.**

**Practice Activity**

- Provide class the opportunity to practice creating additional notes for the FN1, Jacqueline family.

- Review information with the class and answer any/all questions for learners.