

CHILD WELFARE TRAINING CONSORTIUM

Core 130
IS Scanning

2012



CWtC

Scanning and the FSFN File Cabinet

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

Reference the **Documentation Management** pamphlet published by the Department of State that outlines the retention schedules for records applicable to the DCF.

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.

Trainer Notes

This FSFN In-Service Activity can be used with any case currently on the user's desktop. A scenario is provided for use as a guide and can be adjusted based on your agency's needs. However, you may opt to create a seed data case specifically for use with this activity.

Please follow your own individual agency/office protocol and procedures regarding scanning, saving and storing case related files on the computer.

Advise the learner to review the scenario and follow the step by step directions to complete this activity.

File Cabinet Scenario.

Glenda is currently working on a case plan to be reunited with her two children. Glenda has been unemployed for quite some time and has been struggling financially. Glenda obtained a new job as a receptionist at a hotel near her home and emailed you a copy of her first pay statement to prove her employment status. This documentation must be added to the case, via the file cabinet within the FSFN case file. Following your agency's protocol you save Glenda's pay statement to your computer.

- From the **Desktop**, click **Casework** in the Banner bar.
- Select **Case Work** from the dropdown menu.
- From the **File Cabinet** dropdown, select **Employment**.

Review the remaining File Cabinet selections.

- From the Case group box, select the **Case Name**.
- From the **Case Participants** group box, select a **case participant**.

Select an adult mother case participant so the scenario is applicable.

The Imaging window pops up, containing three group boxes: Participant Details, Participants, and Image Details. Review the Participant Details group box, which is pre-populated with the name of the case, the Case ID number and the worker name.

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- In the **Image Details** group box. Complete the following information:
- **Date Document scanned** field, Enter: **Today's date**.

The **Image** field is pre-populated from the selection made from the File Cabinet options in the Case Work menu.

The Image selection determines the available options in the Type field. For our example, **Employment** was selected and only documents related to that option are available. If **Legal** was selected as the Type, then only legal related document options are available.

- From the **Type** dropdown, select **Pay Verification/Pay Stub**.
- Click **Browse** to find the file on the computer.

The name of the file is now populated in the **File Name** field. The file name must be 50 characters or less.

- Select the **Training Designated** file; click **Open** to download the file to FSFN.

This verifies that you want to download the file selected.

- In the **Comments** field, enter "**Glenda's pay statement for first two weeks of her new job.**"
- Click **Save**.
- Click the **View** hyperlink and **Open** on the **File Download** dialog box. Review the document that was added into the FSFN file cabinet. The file can be printed if required.
- Click the "**X**" on the title bar of the window to close the image.
- Click **Close**.
- **Refresh** the **Desktop** and expand the **Case folder** icon to display the **File Cabinet** icon. The uploaded file is now included under **File Cabinet**.
- Click the **File Cabinet** icon to display the hyperlink for the created file.