Entering and Updating Quality Assurance Review Case Notes and Requests for Action in FSFN

Florida Department of Children and Families

Office of Family and Community Services

Child Welfare

June 23, 2011

QA Review Case Notes

- Job Class and Security User Group in FSFN
- Creating a Case Note without an RFA in an Open or Closed Case
  - Search by Person or Case
  - Create a Case Note
- Updating a Case Note or Creating a Case Note with an RFA in an Open Case
  - Search by Person or Case
  - Assignment to Case
  - Create a Case Note or
  - Update a Case Note
  - End Assignment
- Updating a Case Note or Creating a Case Note with an RFA in a Closed Case
  - Re-Open Case for Administrative Purposes
  - Create a Case Note or
  - Update a Case Note
  - Closing a Case

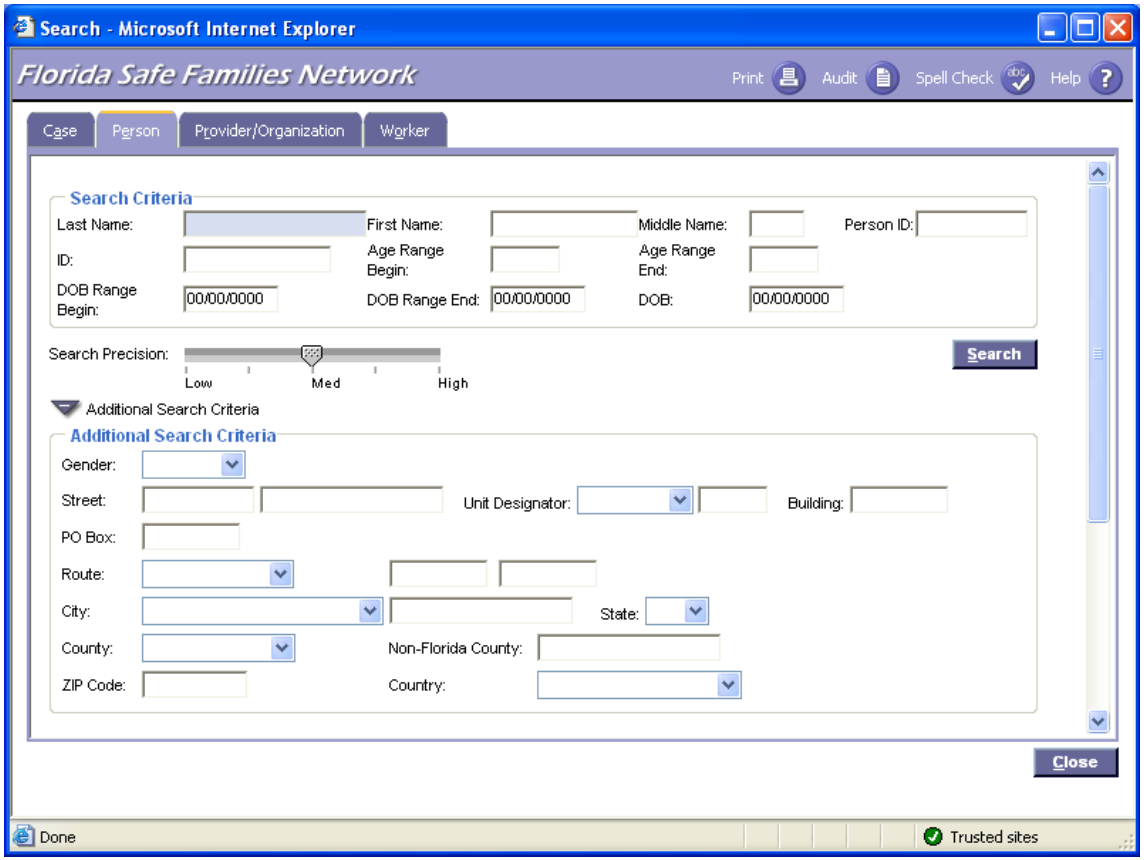
Job Class and Security Profile

- There are several Job Class and Security User Group combinations that will allow users to complete the activities described in this document. **Try these (specifically Assignment to a Case and Re-open Case for Administrative Purposes) using your current FSFN profile. If you get a Security error**, follow local security protocols for adding the following to your FSFN profile:
  - DCF Staff: DCF Program Specialist Job Class and DCF Program Specialist Security User Group
  - CBC Staff: Child Case Specialist Job Class and Child Case Specialist Security User Group

Search by Person or Case

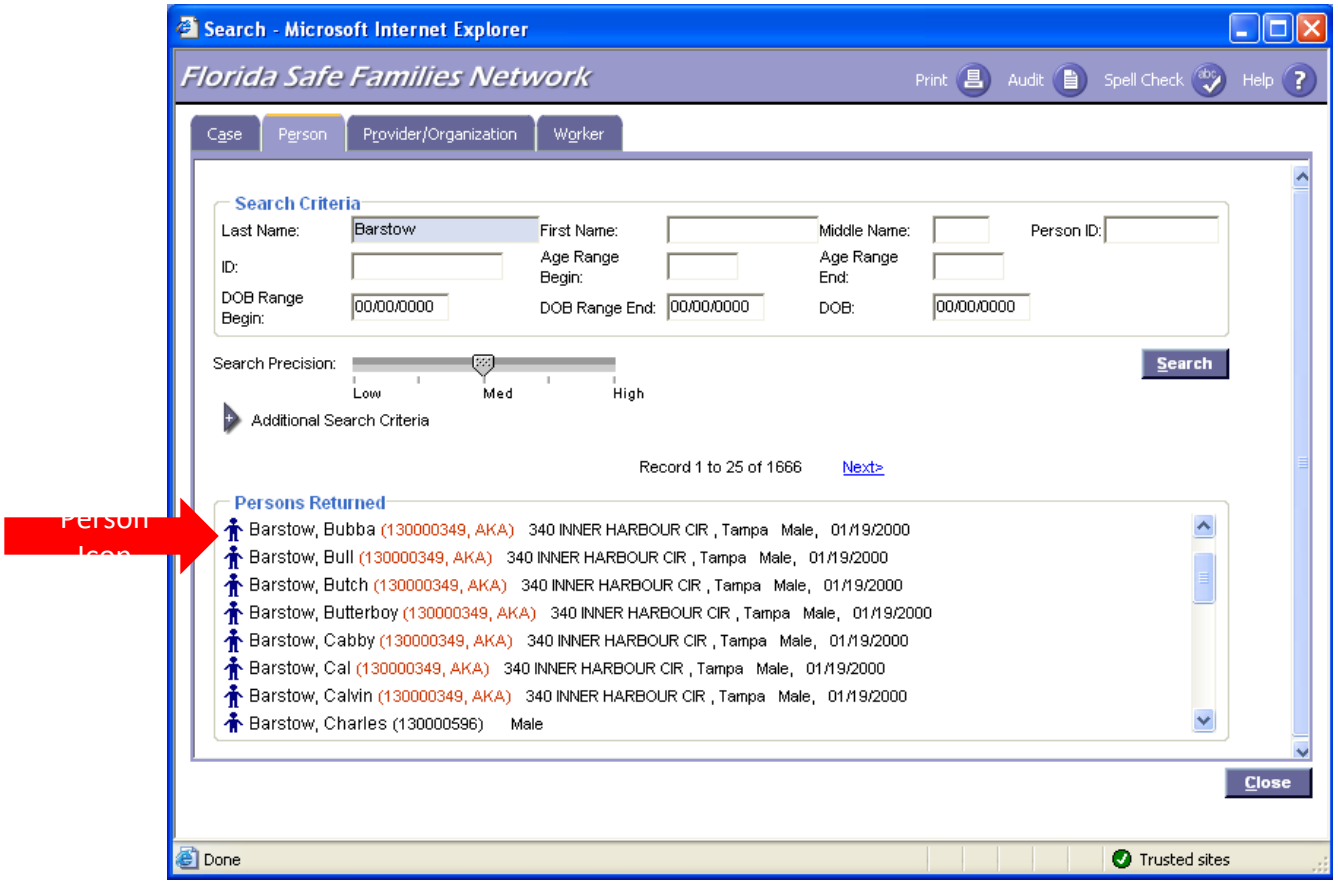
Search by Person

Log in to FSFN and Click “Search” icon; Select “Person” tab; Enter as much information known on person; Click “Search”



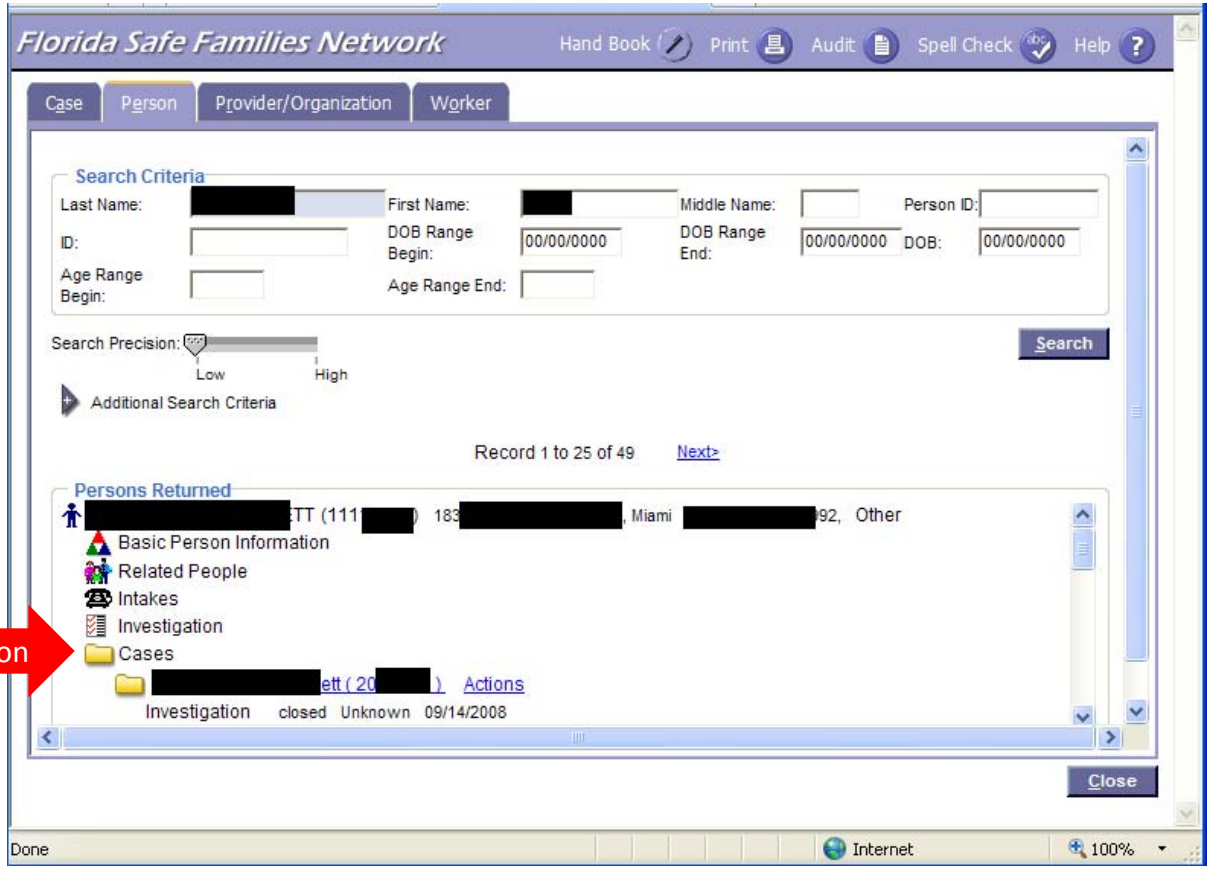
Search by Person

- Click the Person icon to select the appropriate person



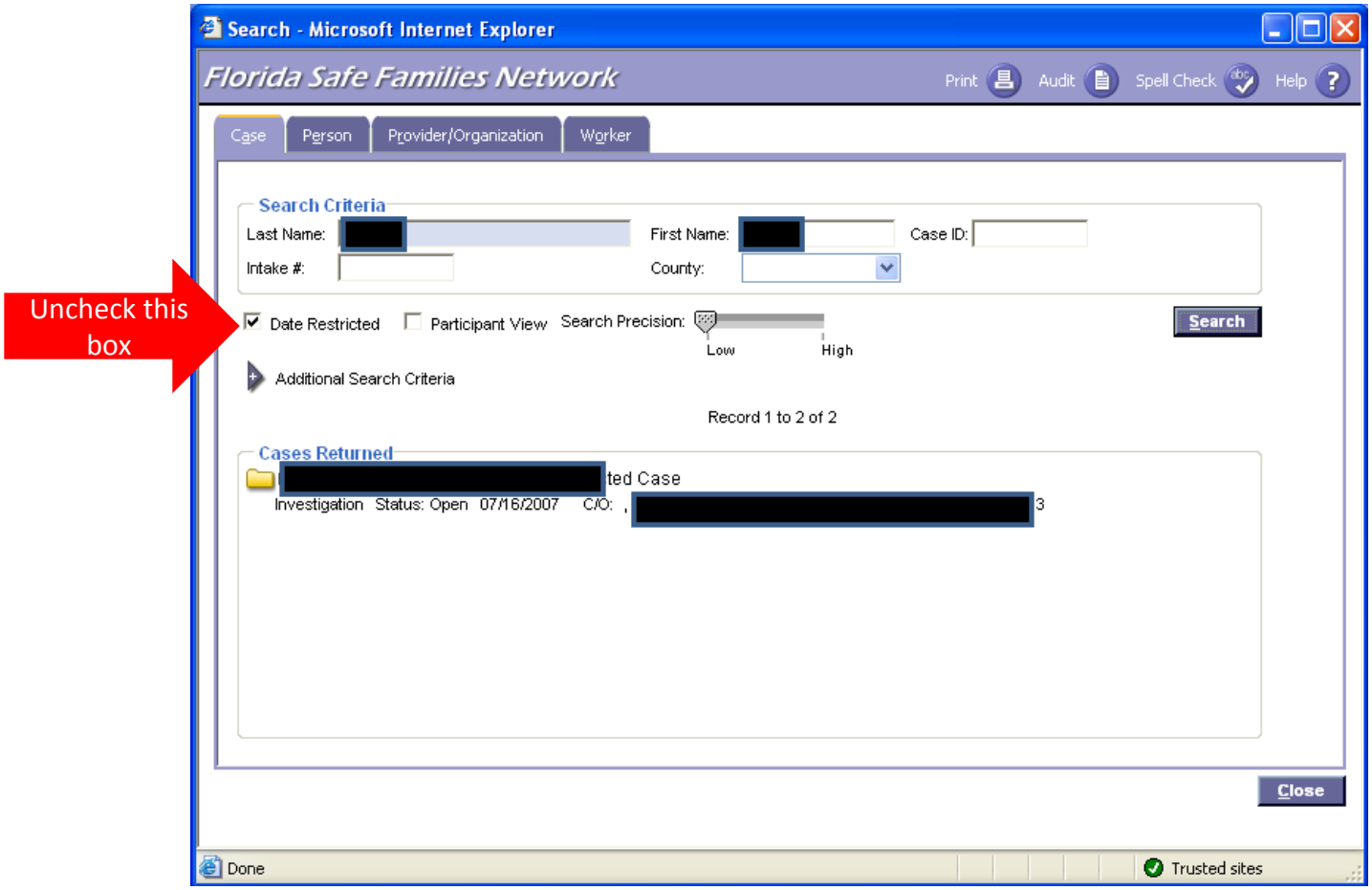
Search by Person

- Click the Case icon to view all cases associated with the person



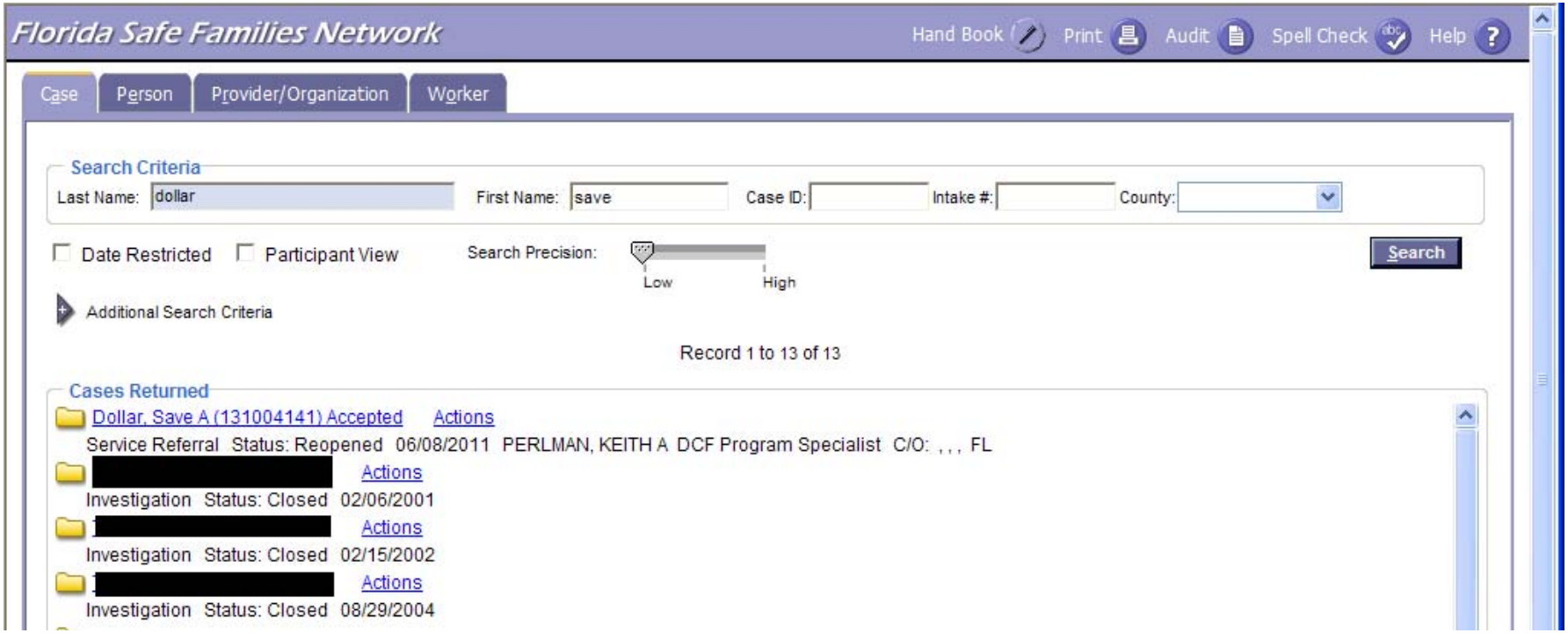
Search by Case

Log in to FSFN and Click “Search” icon; Select “Case” tab; Enter the Case Name (LN and FN) or Case ID or Intake Number; Uncheck the “Date Restricted” box to begin search



Search by Case

- Click the Case icon next to the desired Case to see casework activity

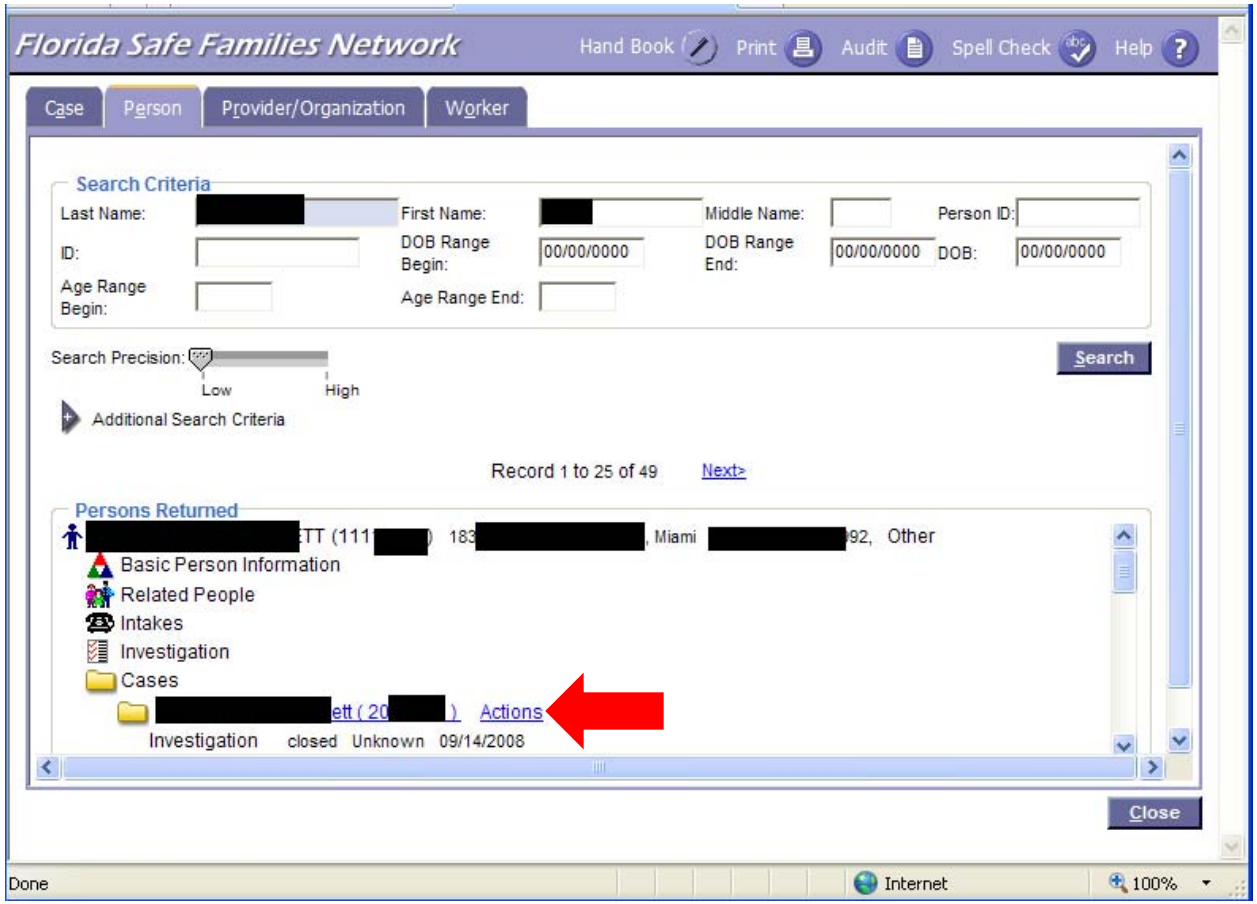


Case Icon

Create a Case Note

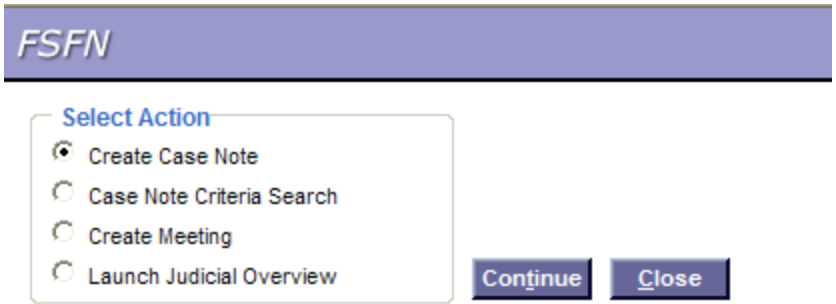
Create a Case Note

Click the “Actions” hyperlink next to the case in which the note is to be entered;



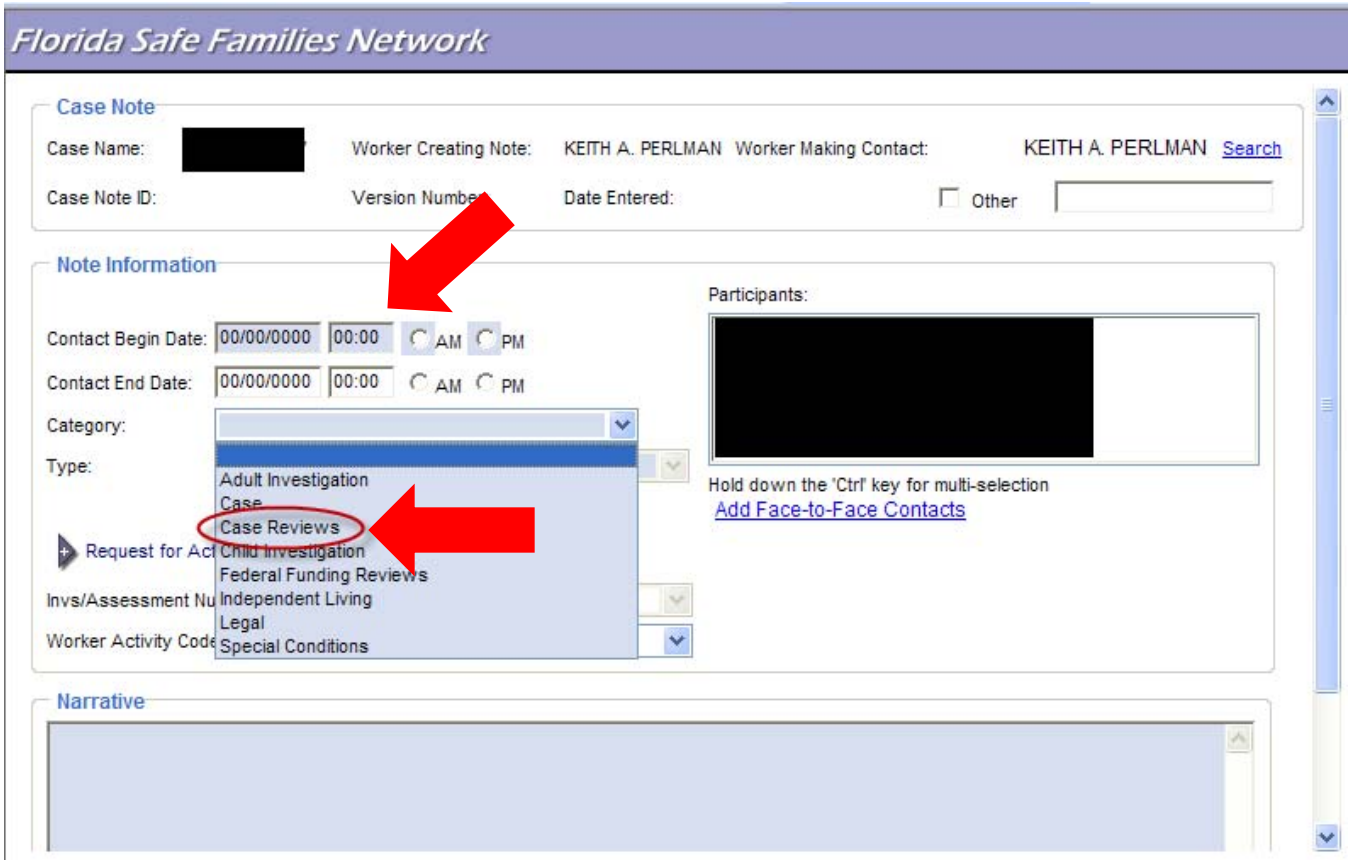
Create a Case Note

Select the “Create Case Note” radio button and click “Continue”



Create a Case Note

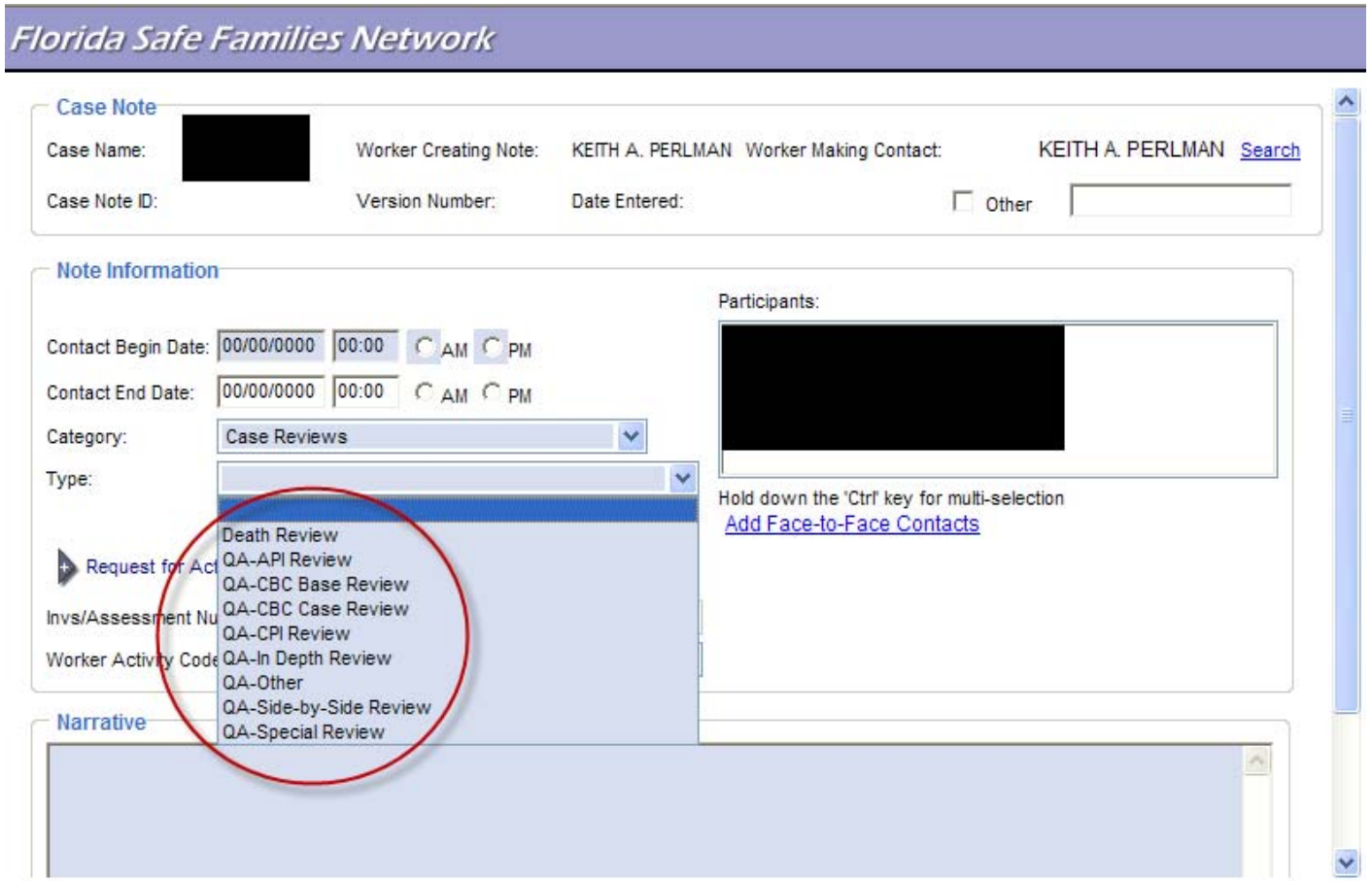
Enter the Contact Begin Date and Time and select “Case Reviews” from the “Category” drop down box



Create a Case Note

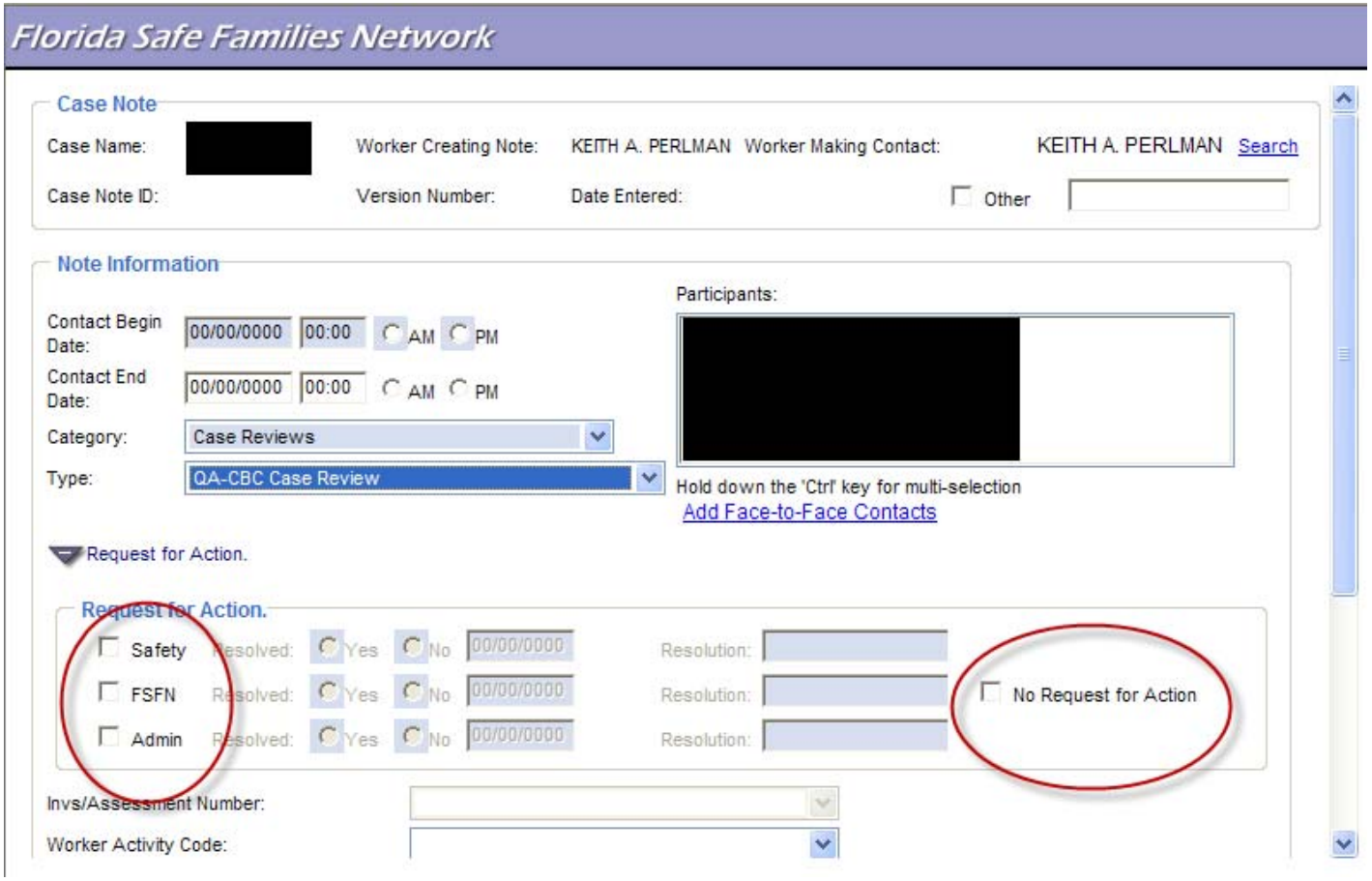
Select the Review Type from the “Type” drop down box;

NOTE-when you select a Review Type, the “Request for Action” section is automatically enabled



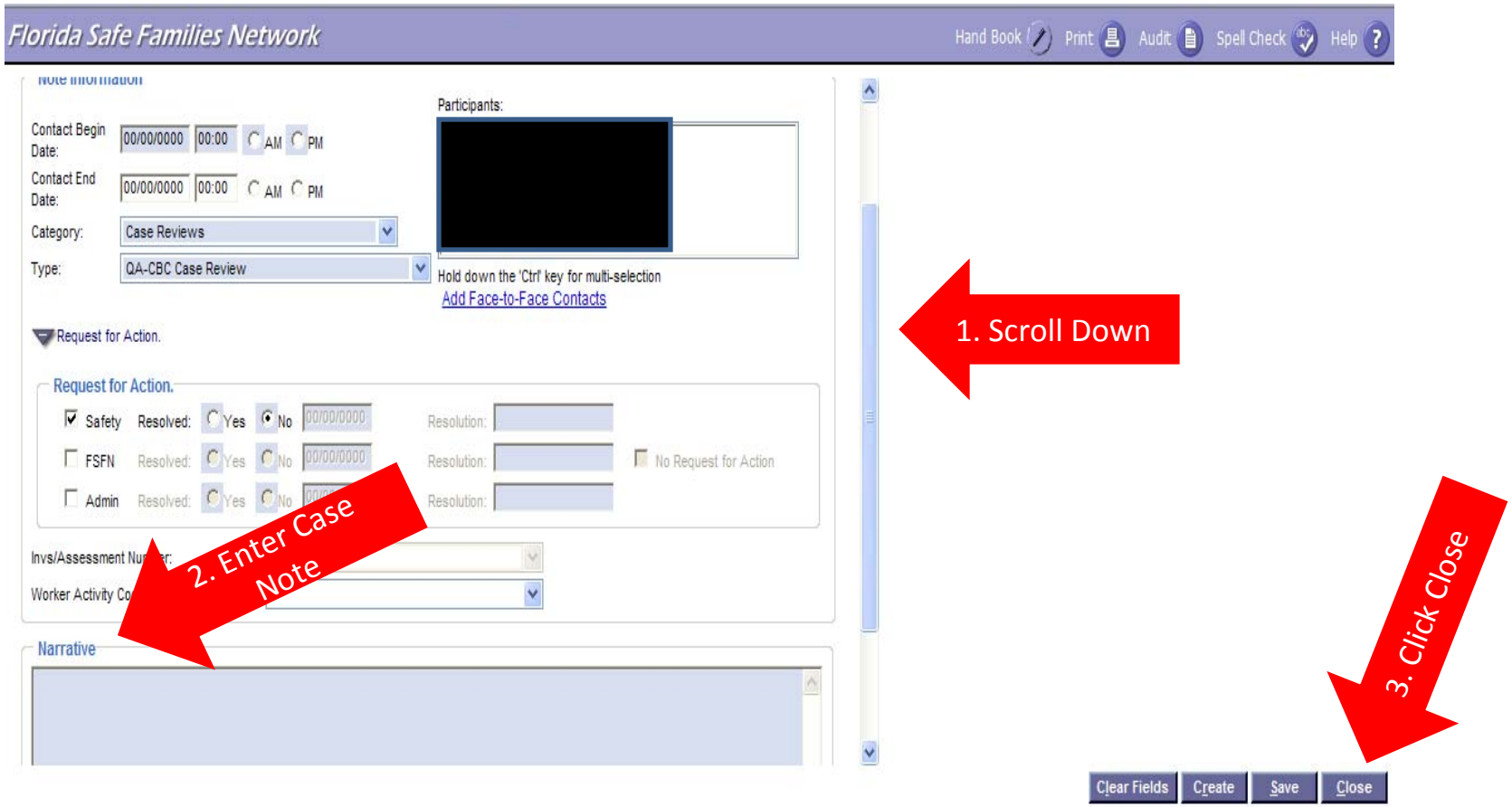
Create a Case Note

- Select the appropriate RFA(s), or select the “No Request for Action”; If you select an RFA, the “Resolved” radio button is enabled and defaults to “No”; If the RFA is resolved, click “Yes” and enter an explanation of the Resolution; If the RFA is resolved at a later date, the case note will need to be updated to “Yes” and an explanation of the Resolution must be entered upon resolution- See Updating a Case Note slide for more details



Create a Case Note

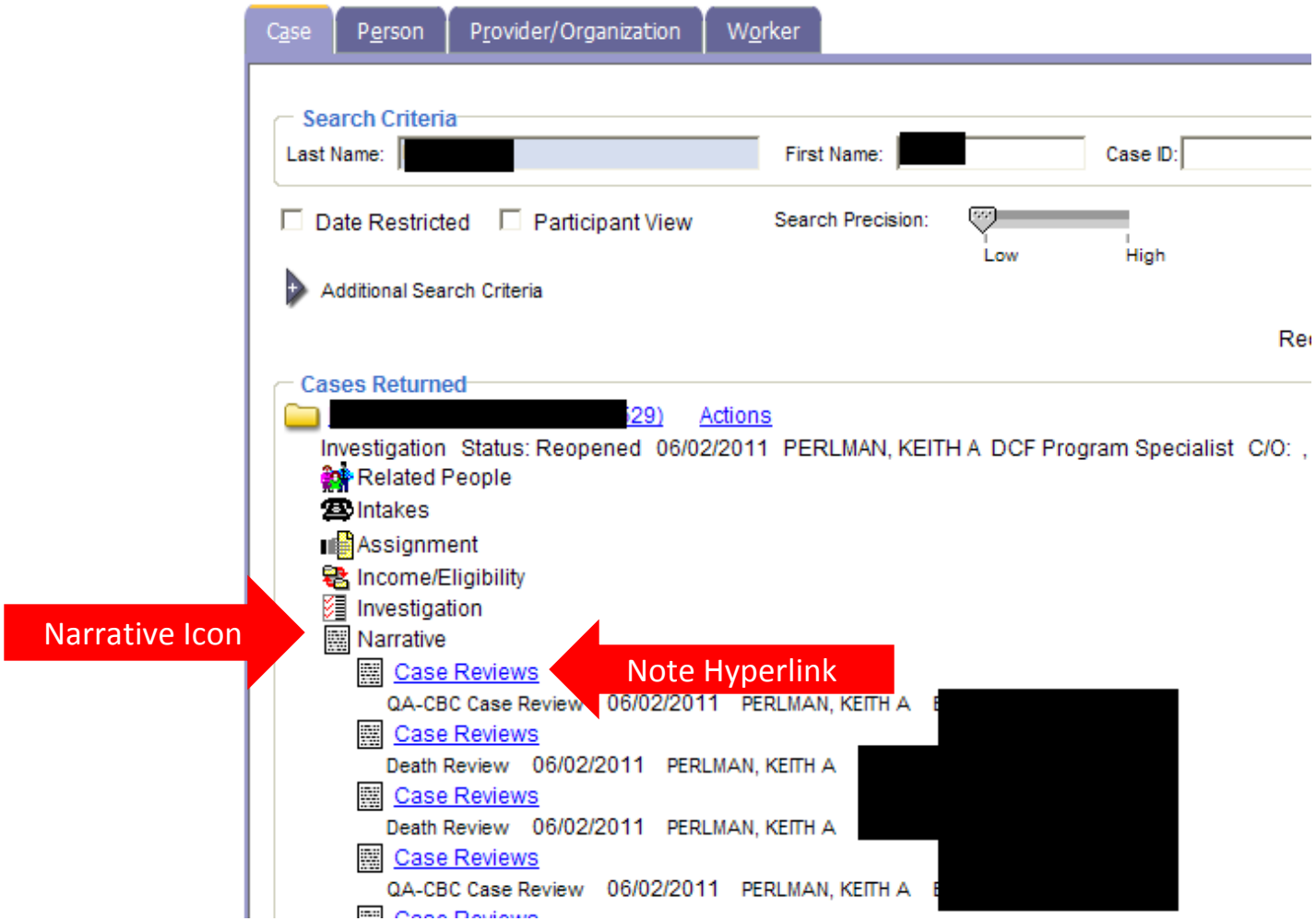
- Scroll down to the “Narrative” section and enter the Case Note text; Click “Close”, and then “Yes” when asked if changes should be saved prior to closing



Update a Case Note

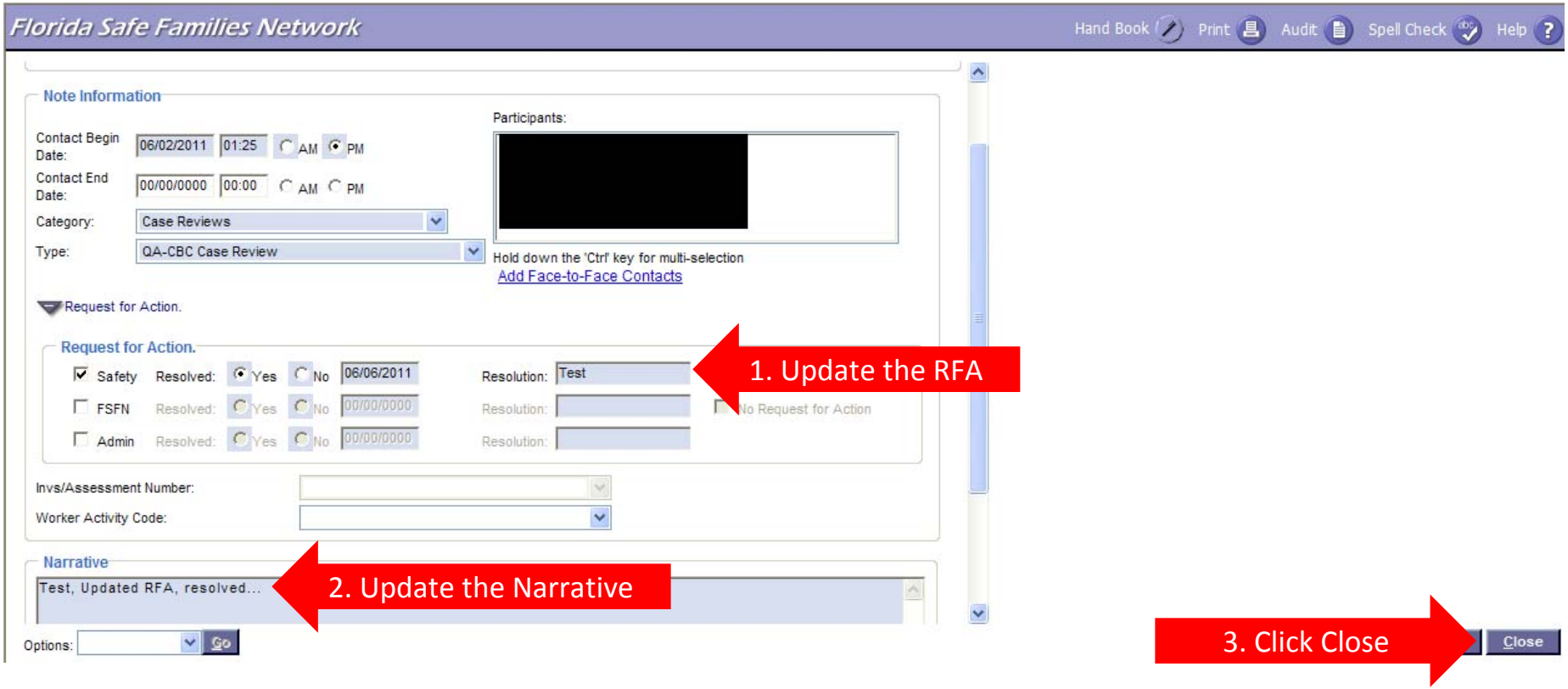
Update a Case Note

Click the “Narrative” Icon to display the Notes history; click the hyperlink of the note you want to update



Update A Case Note

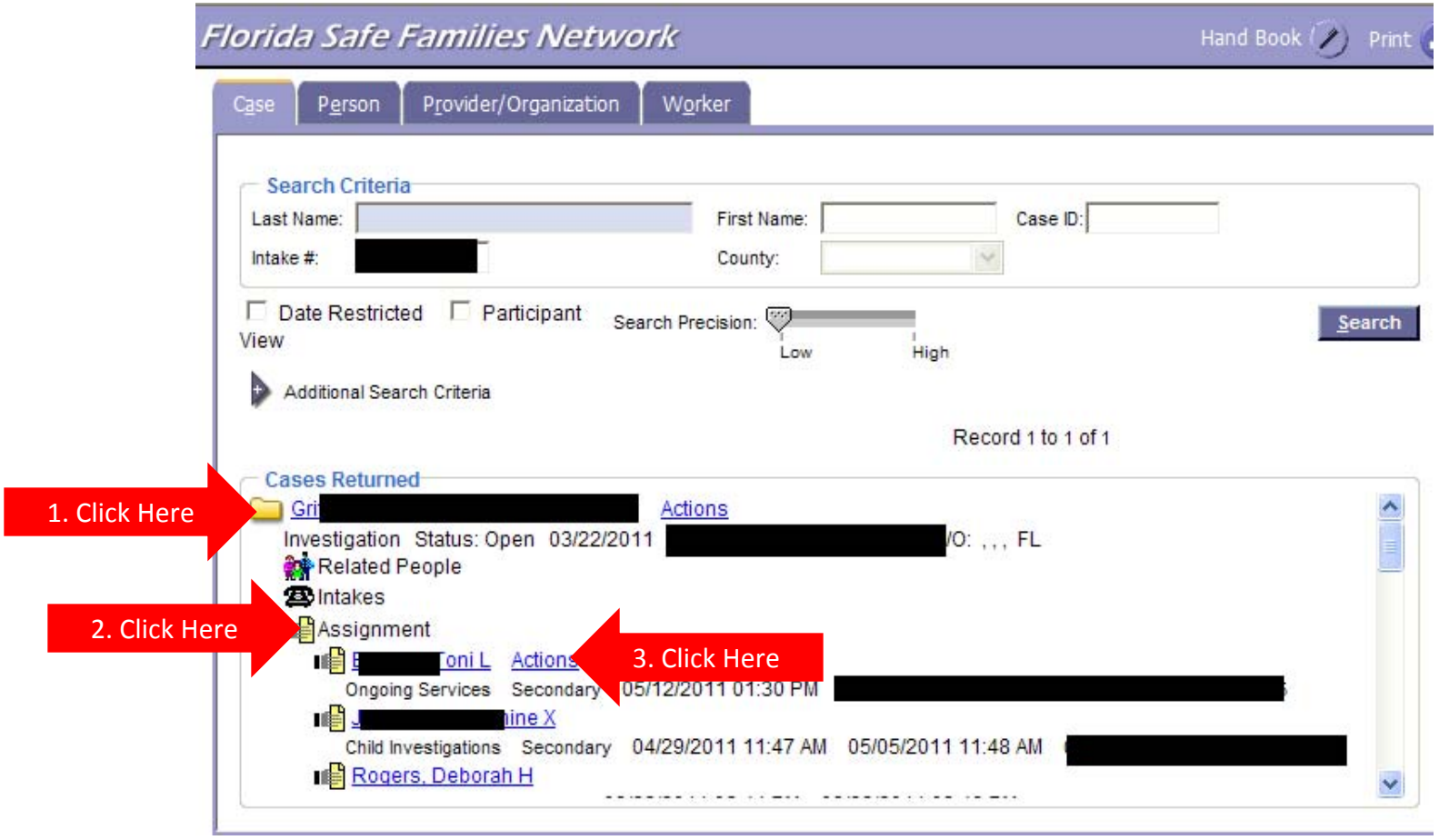
Update the Note as Appropriate and click “Close”; Select “Yes” when asked if you want to save changes



Assignment to a Case

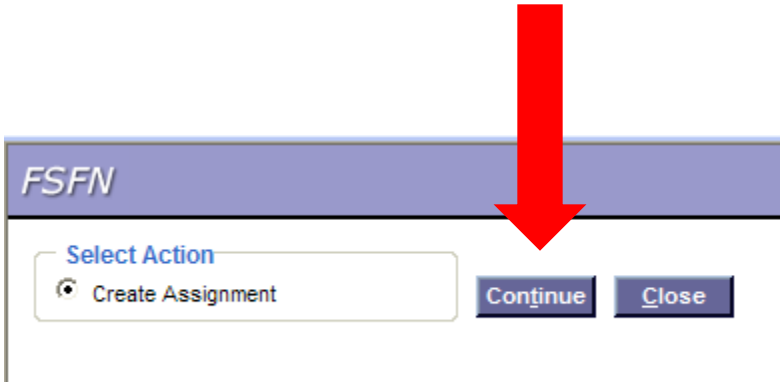
Assignment to a Case

Search for the case to which you want to be assigned; Click the Case Folder icon, Click the Assignment Icon, Click the "Actions" hyperlink next to any active assignment



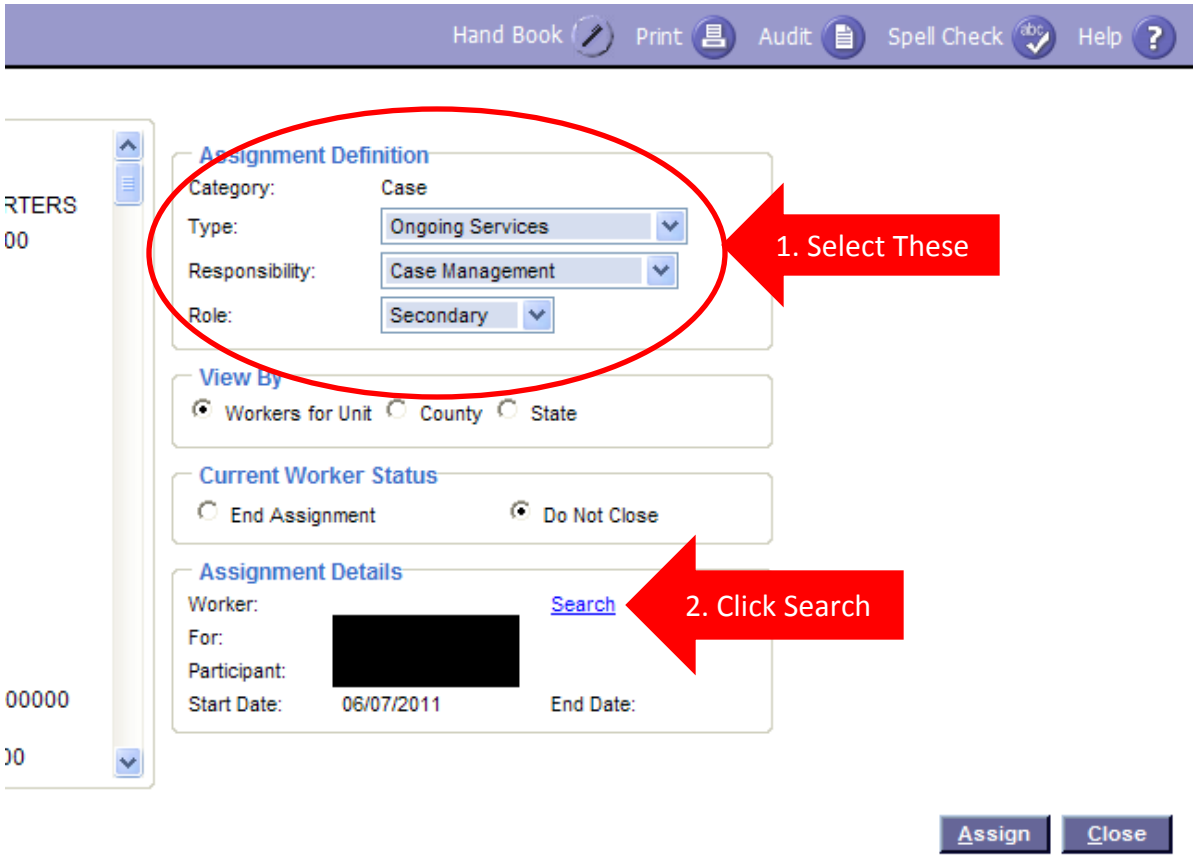
Assignment to a Case

Select “Continue”



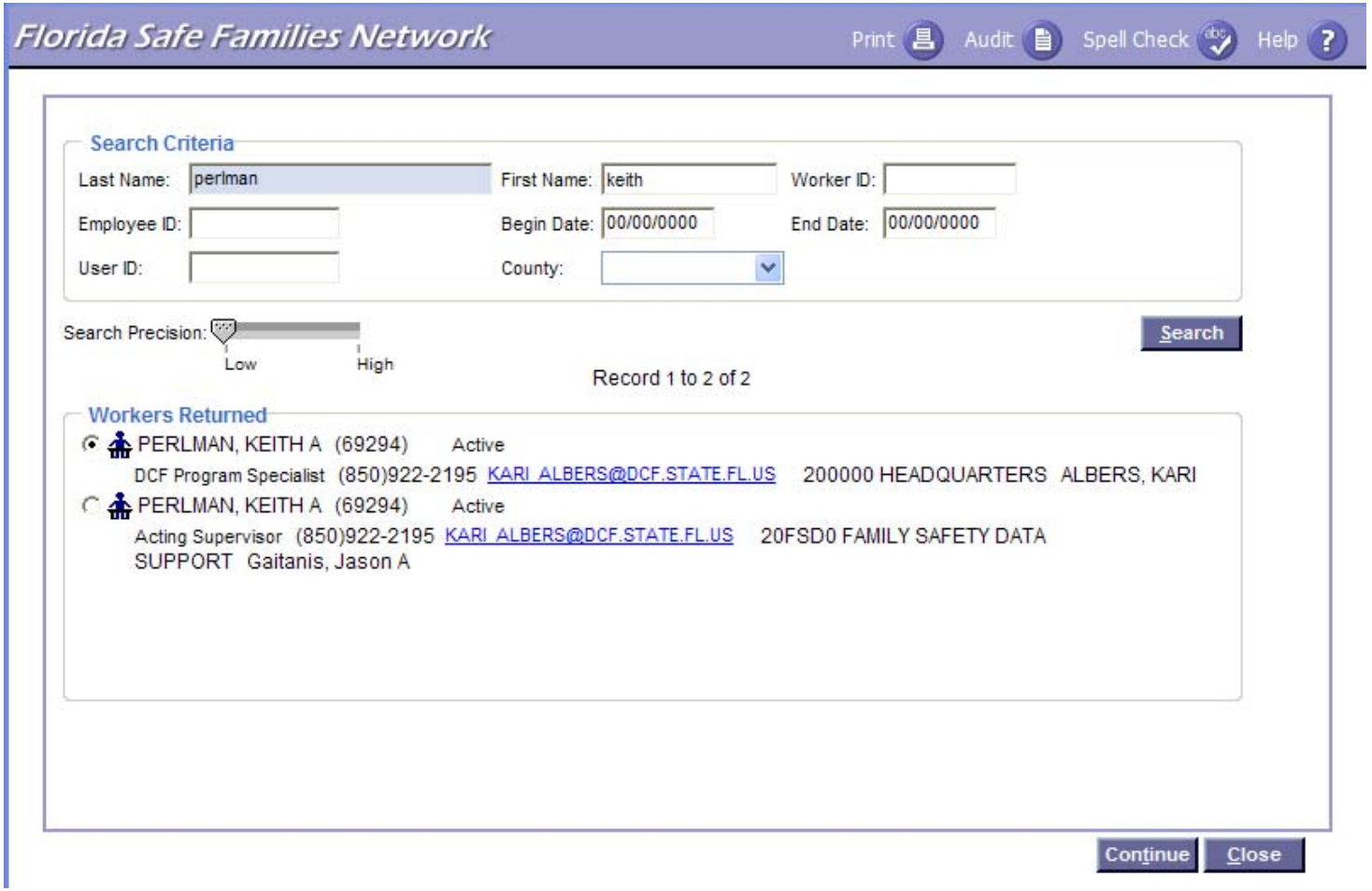
Assignment to a Case

In the “Assignment Definition” box, select “Ongoing Services” from the “Type” drop down box, “Case Management” from the “Responsibility” drop down box and “Secondary” from the “Role” drop down box. In “Assignment Details” box, click “Search” hyperlink. Ignore the “View By” and “Current Worker Status” sections.



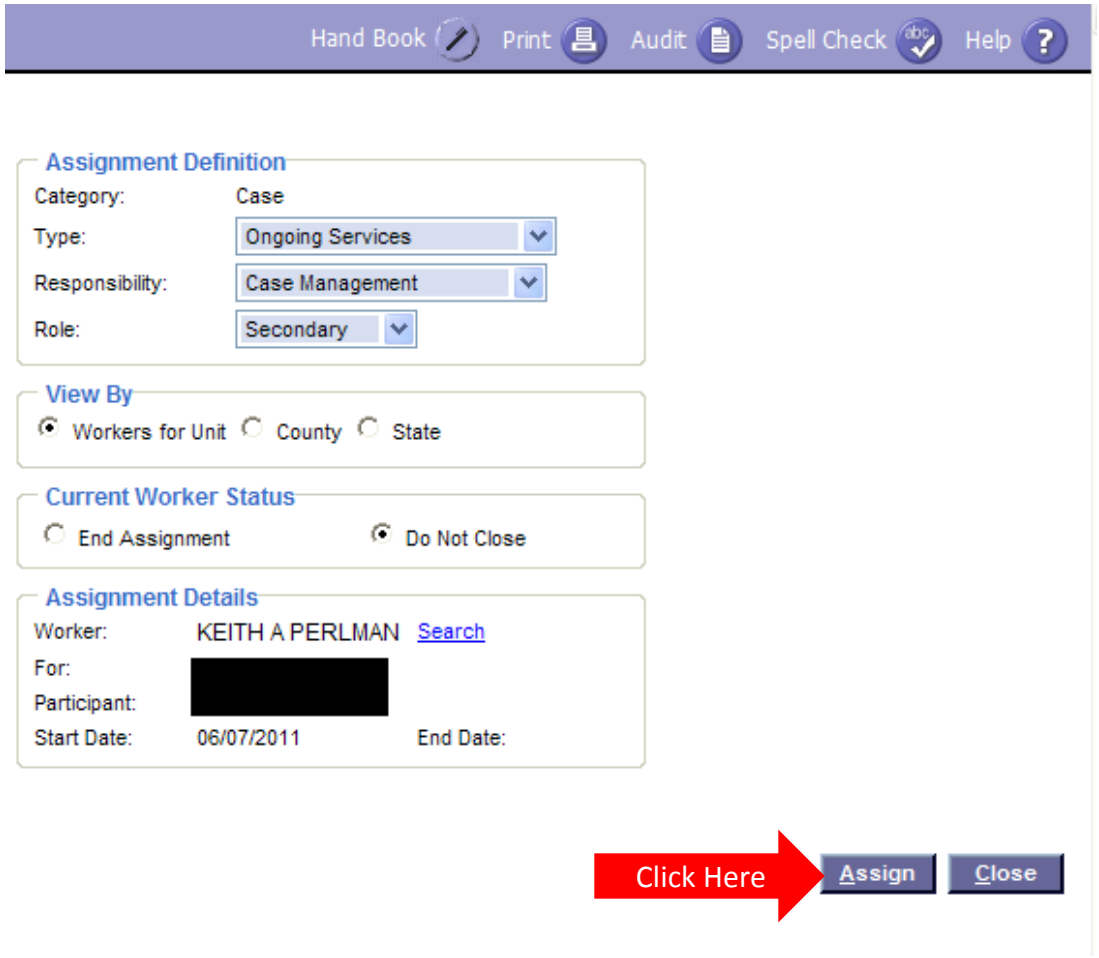
Assignment to a Case

Enter your name in the “Search Criteria” box, click “Search,” Select the Radio Button next to the appropriate name/user profile and click “Continue”



Assignment to a Case

Click “Assign”



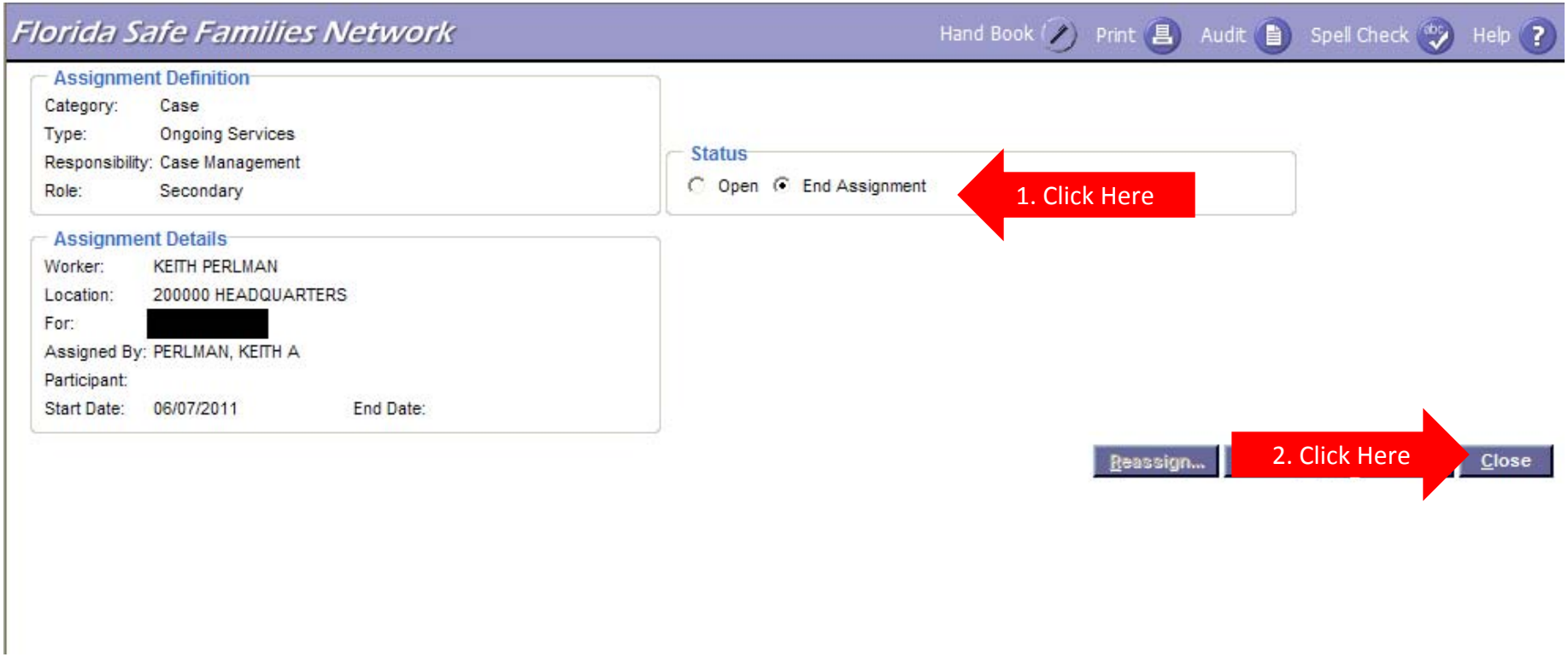
End Assignment

End Assignment

Click Case Folder icon from FSFN desktop; Click "Assignment" Folder; Click your name (hyperlink) associated with your active assignment

End Assignment

Select the “End Assignment” Radio Button and click “Close”; Click “Yes” when asked to save changes before closing page



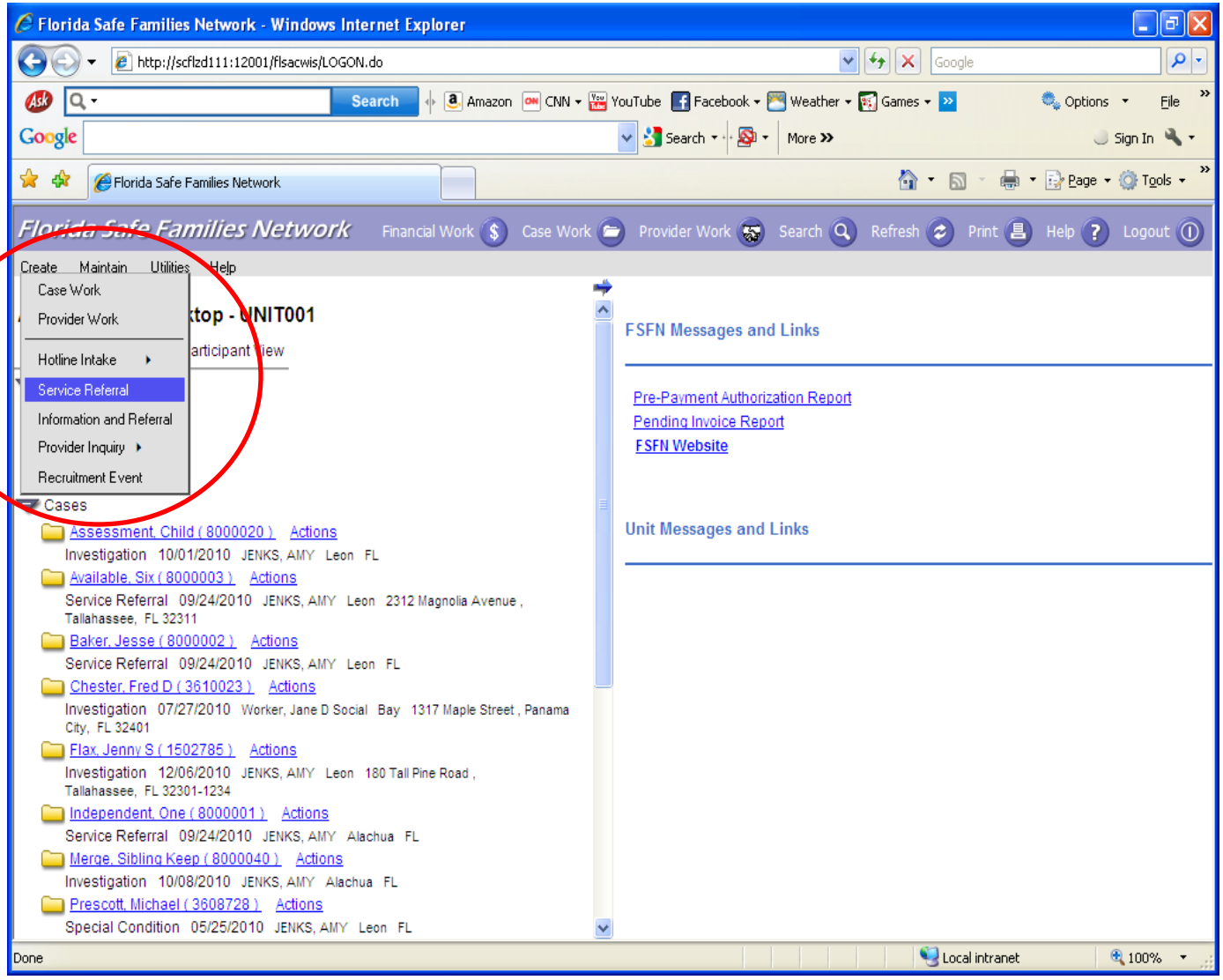
Re-Open a Case for Administrative Purposes

*Note- It is only necessary to Re-Open a closed case to enter a case note in the following circumstances:

- The case note includes an RFA (this will add the case to your FSFN desktop), or
- The case note is being updated (it is not possible to update a case note in a closed case)

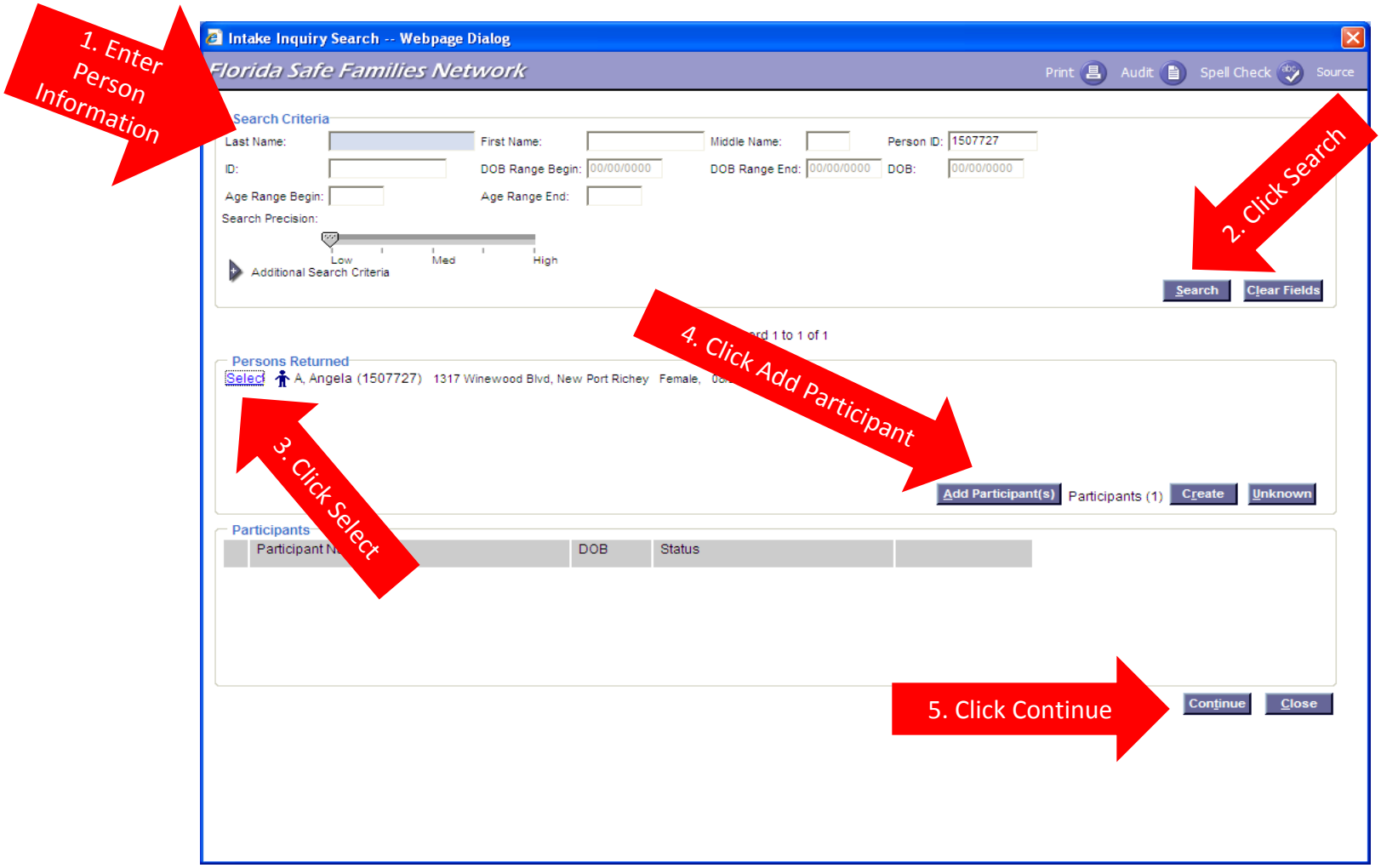
Re-Open a Case

Click the Create menu item; select Service Referral



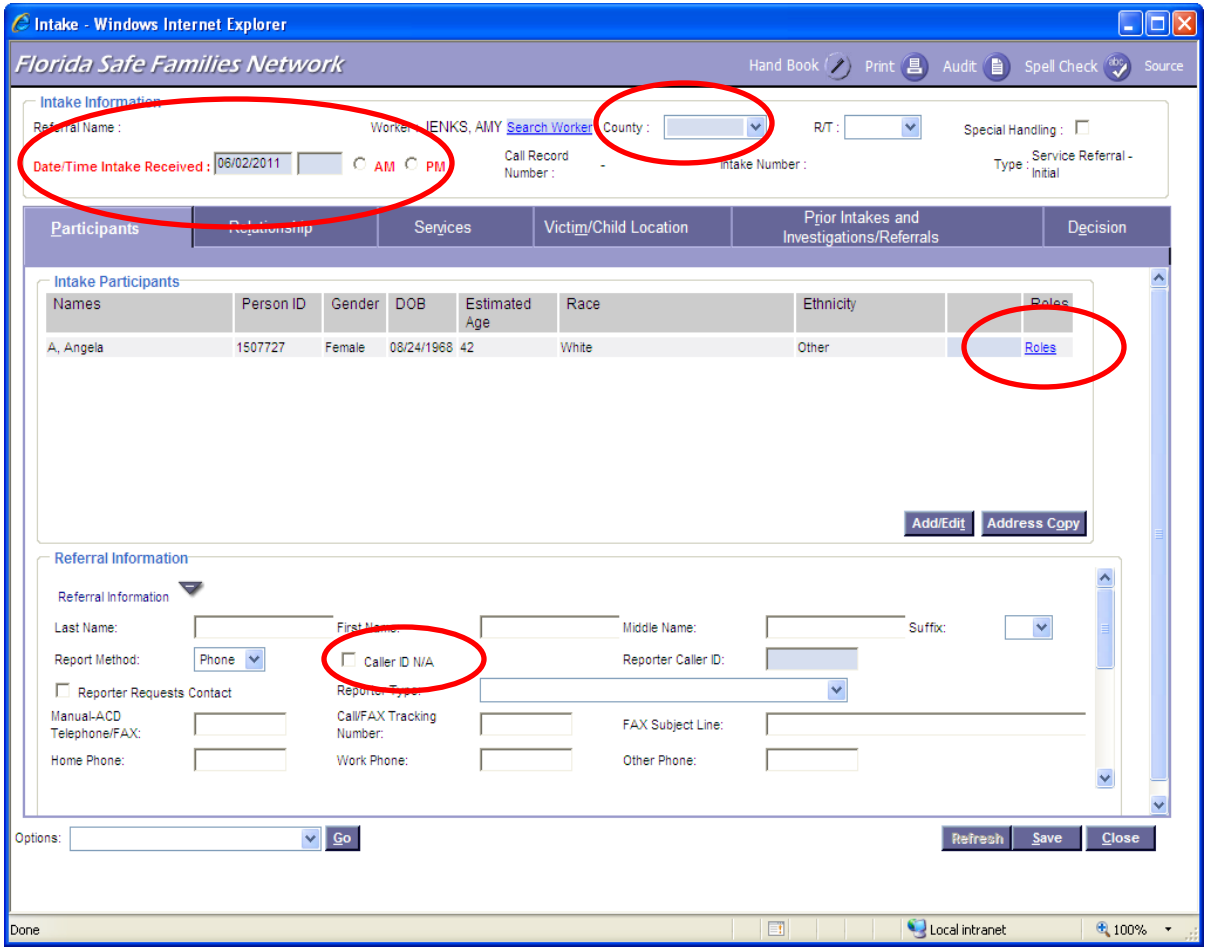
Re-Open a Case

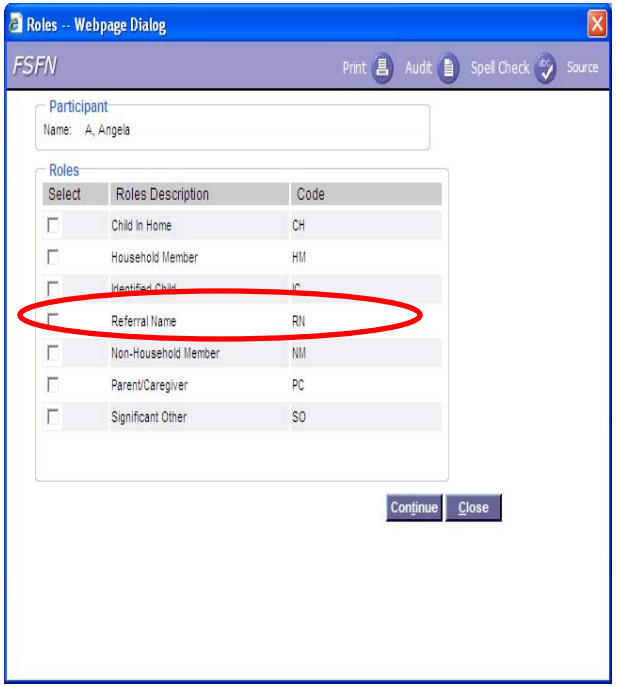
Enter all known information on the participant and click the “Search” button; all matching results are returned within the “Persons Returned” group box; Click the “Select” hyperlink next to the applicable person ; click the Add Participants button; click “Continue” button.



Re-Open a Case

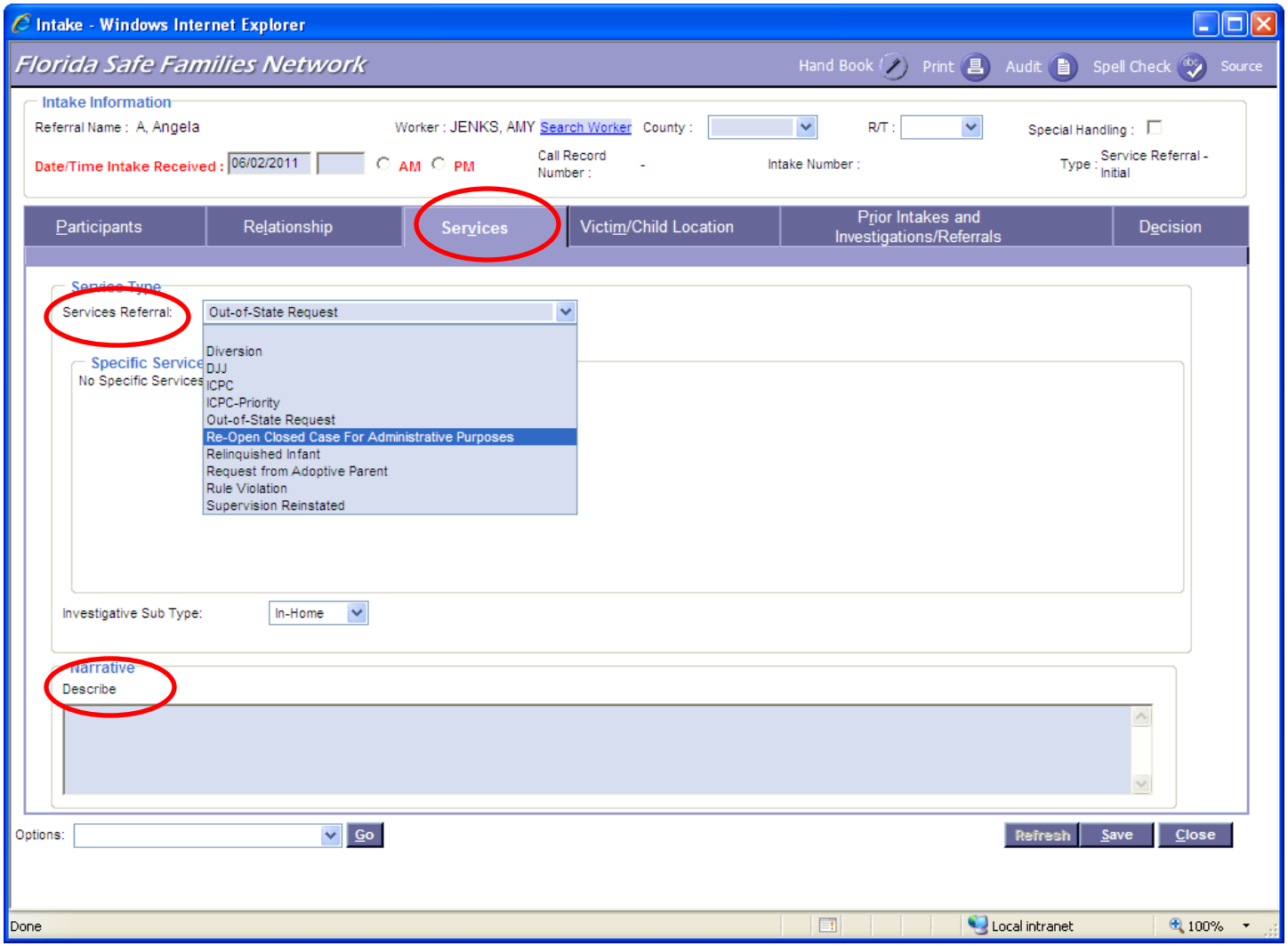
In the “Intake Information” box, enter the current date and time, with AM/PM designation in the “Date/Time Intake Received” box and select the applicable County; In the “Participants” tab click the “Roles” hyperlink and select “Referral Name”; click the Continue button to return to the Participants tab; Open the “Referral Information” expando and select the Caller ID N/A checkbox





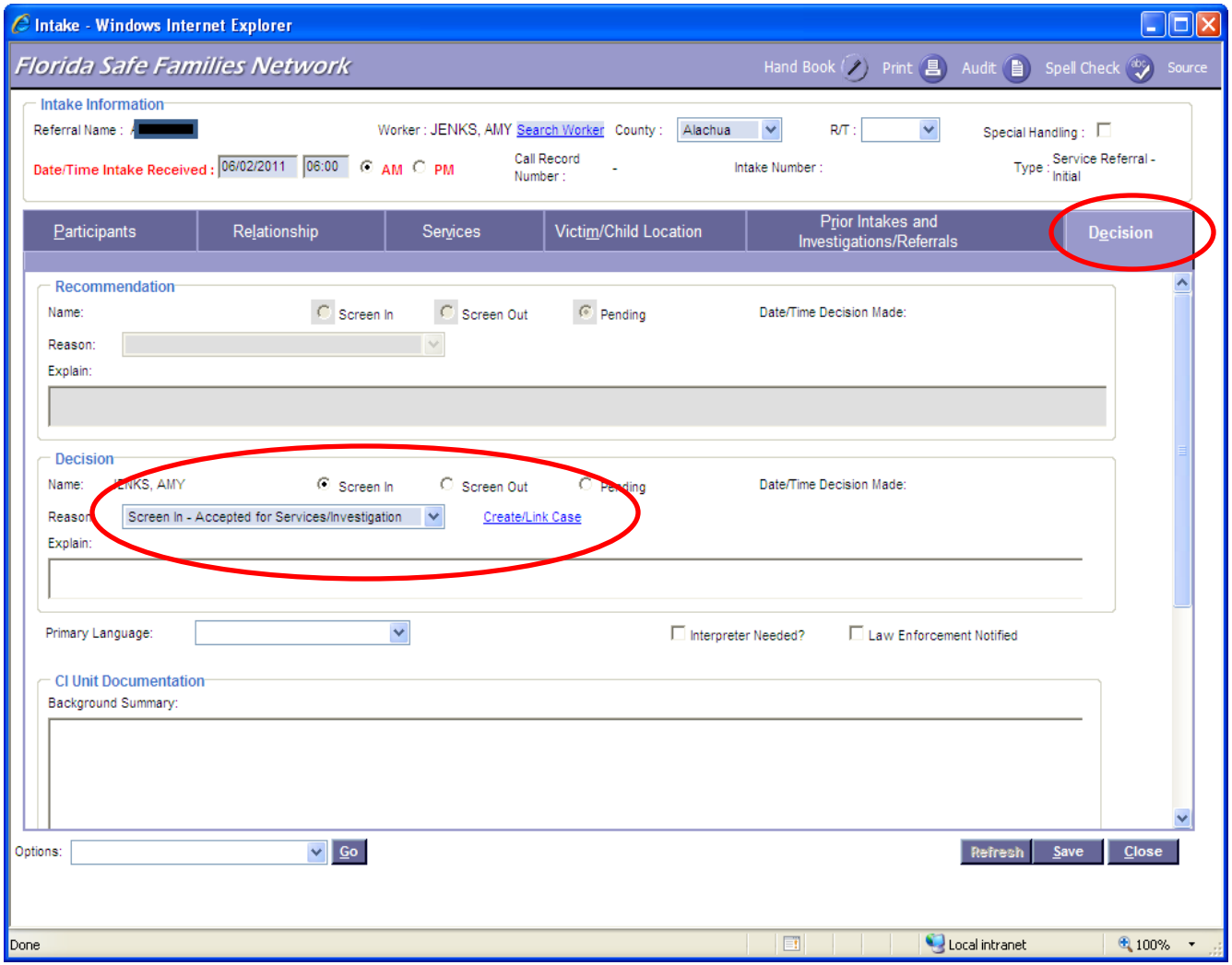
Re-Open a Case

Click the “Services” tab and from the “Services Referral” drop down box select “Re-Open Closed Case For Administrative Purposes”; Enter a brief narrative in the “Describe” text field; Click “Save”



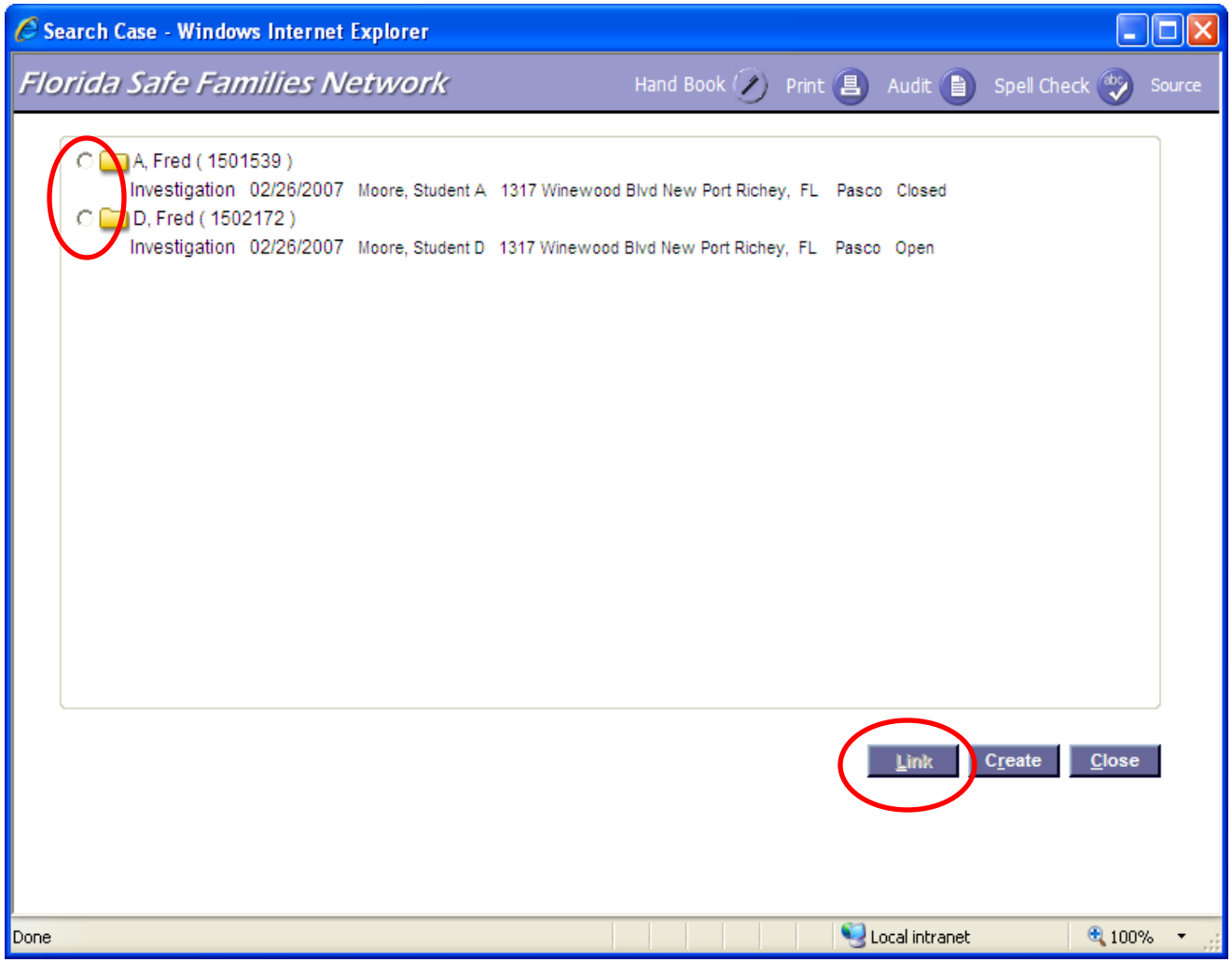
Re-Open a Case

Click the “Decision” tab; In the “Decision” box select “Screen In”; Click the “Create/Link Case” hyperlink; click “Yes” to the messages regarding saving and not compromising reporter identity;



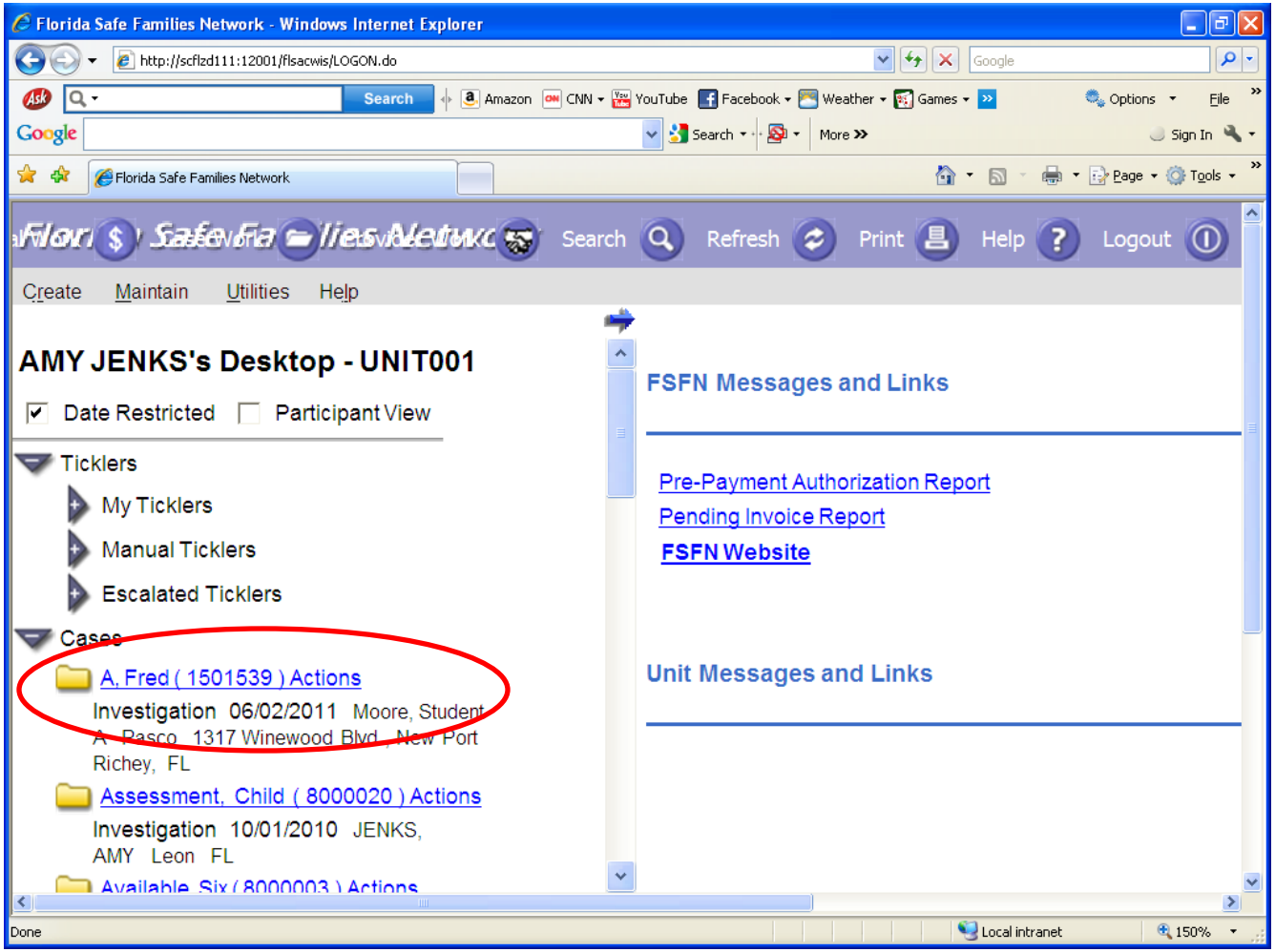
Re-Open a Case

All Cases in which the intake participant is a case participant are displayed. Select the applicable radio button and click the Link button, which only becomes enabled after selecting an applicable radio button. Upon selecting the Link button the Maintain Case page is displayed.



Re-Open a Case

Maintain Case page: Please note that the Status of the Case, which was previously closed, now shows “Reopen”; Click the “Save” button; If a message regarding updating participant addresses appears, select “No”; The case is now open and will display on your desktop, listing you as the Primary Worker; You may now create or update the Case Note

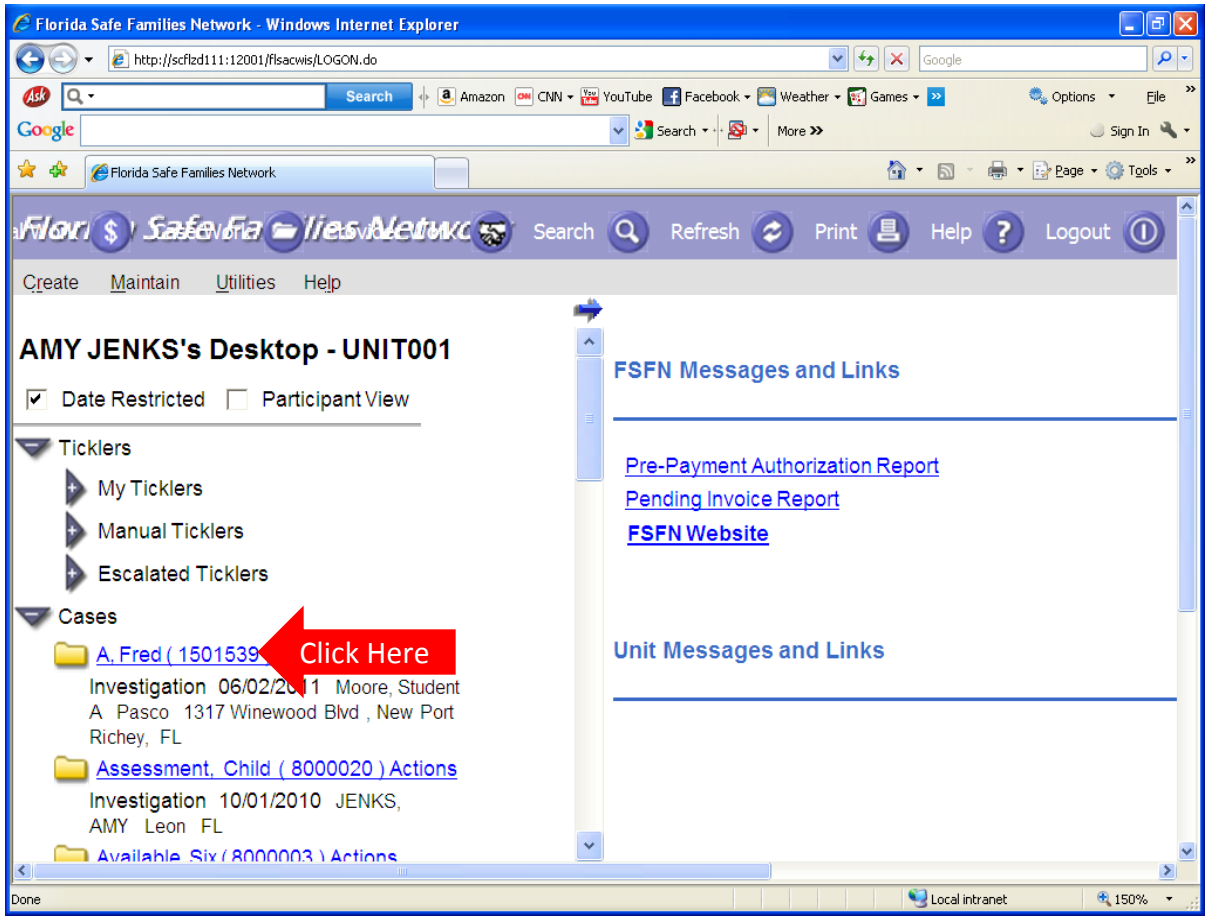


Closing a Case

***NOTE- You should only close a case that you have re-opened in order to enter or update a case note. Do not close a case that you did not re-open.**

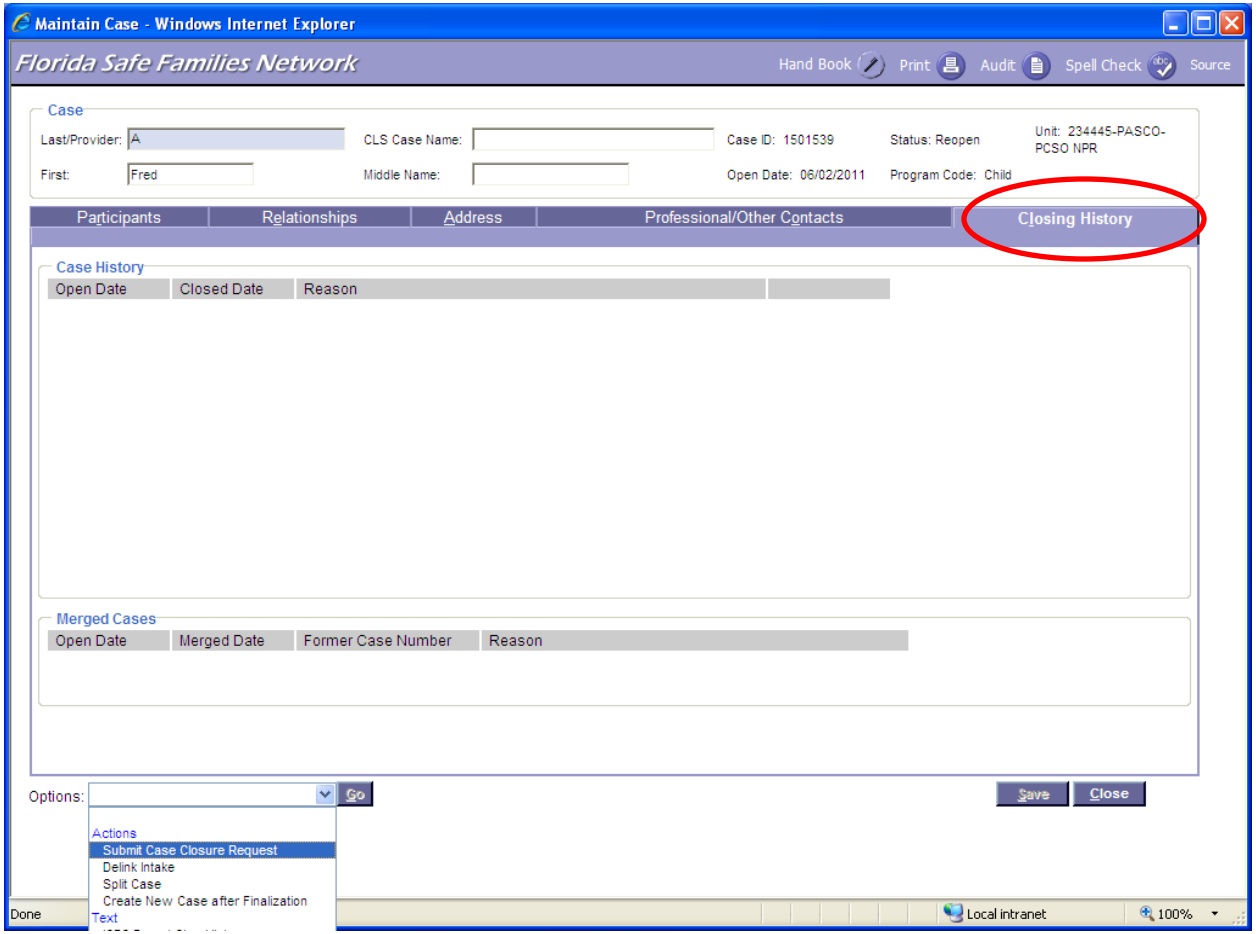
Closing a Case

From your FSFN desktop, click the Case Name hyperlink of the case you want to close-this will take you to the Maintain Case page



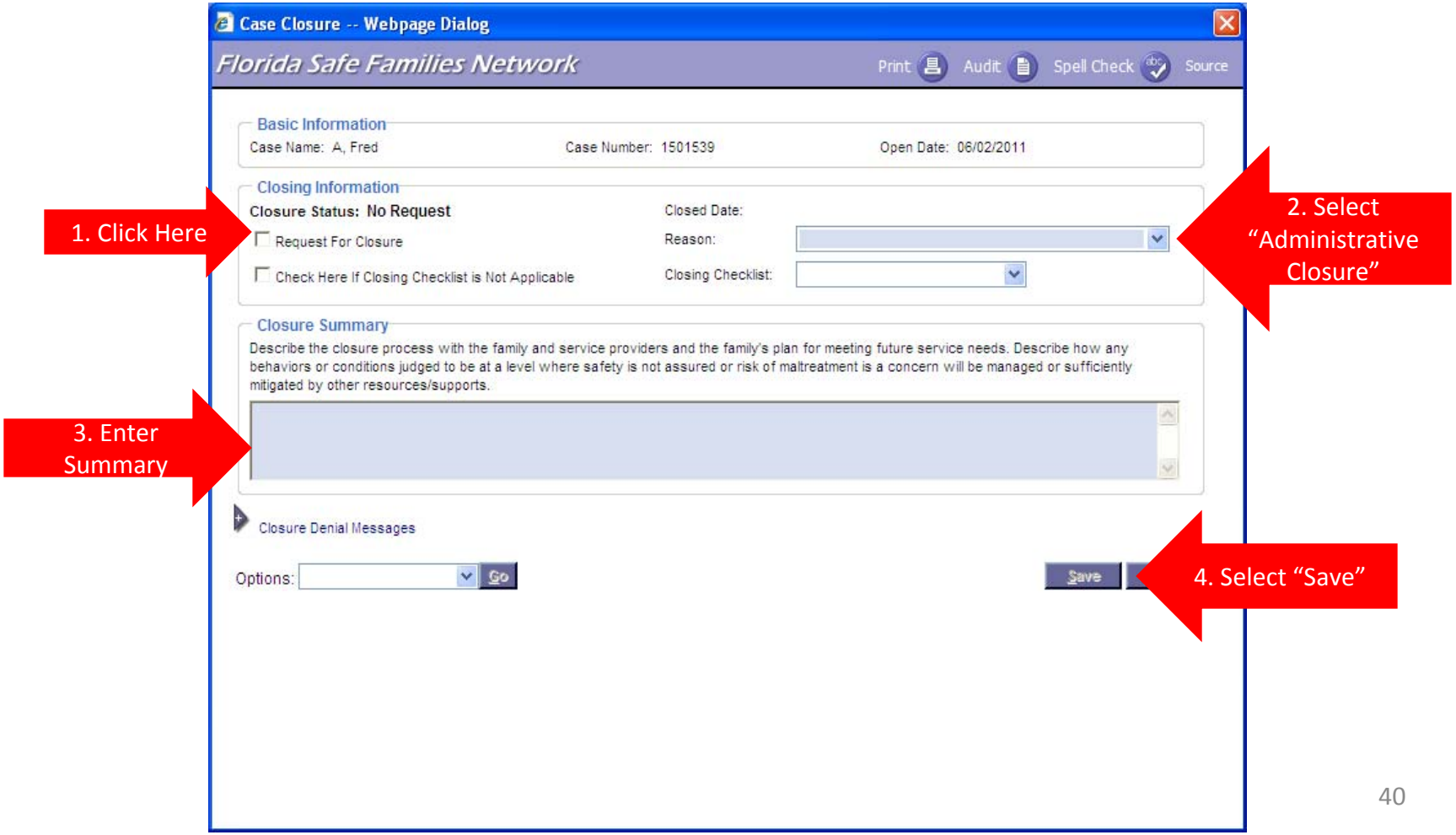
Closing a Case

From the Maintain Case page click the “Closing History” tab; From the Options drop down box select “Submit Case Closure Request”; Click “Go”



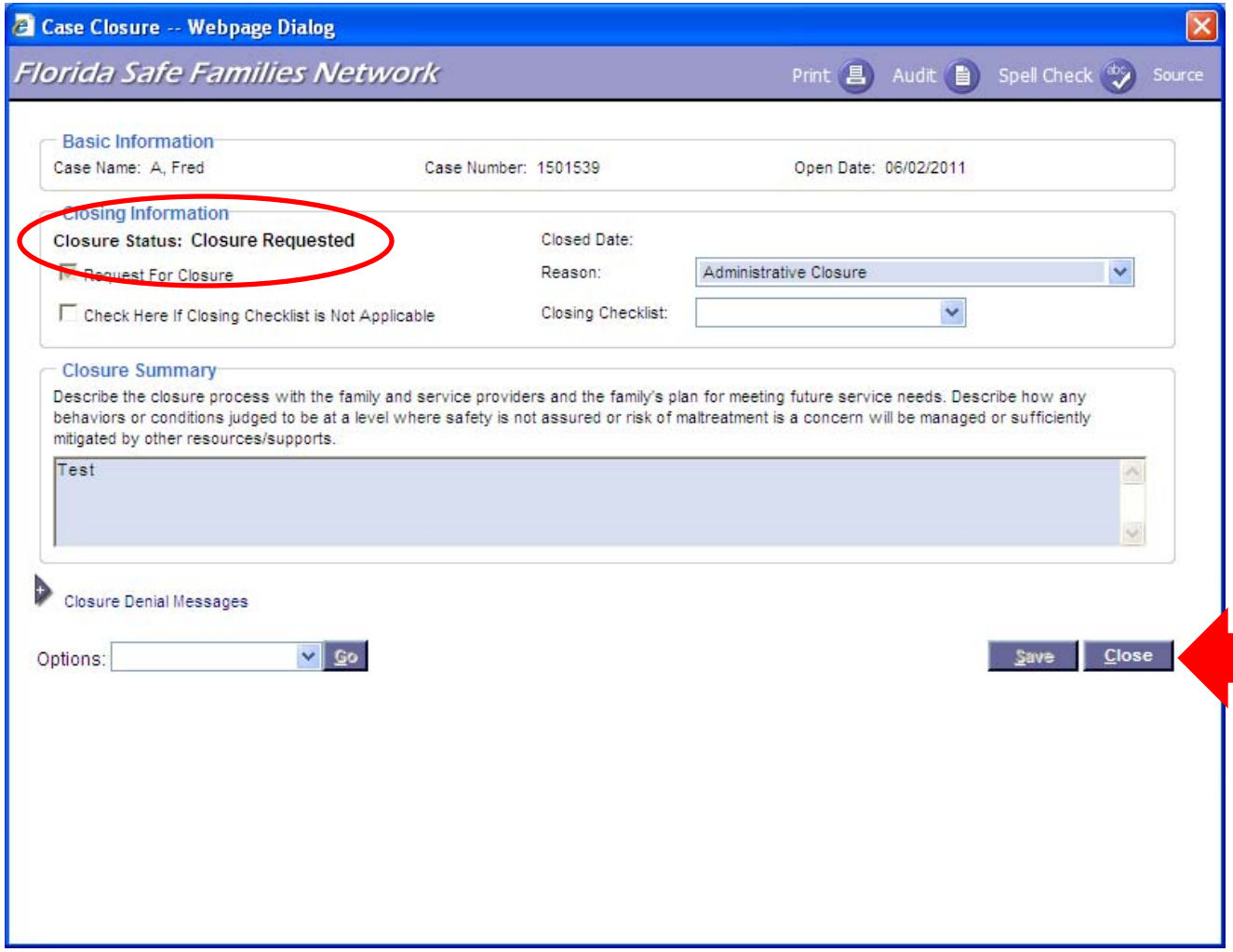
Closing a Case

Select the “Request for Closure” box and in the “Reason” dropdown box select “Administrative Closure”; Enter a brief “Closure Summary”;click the Save button.



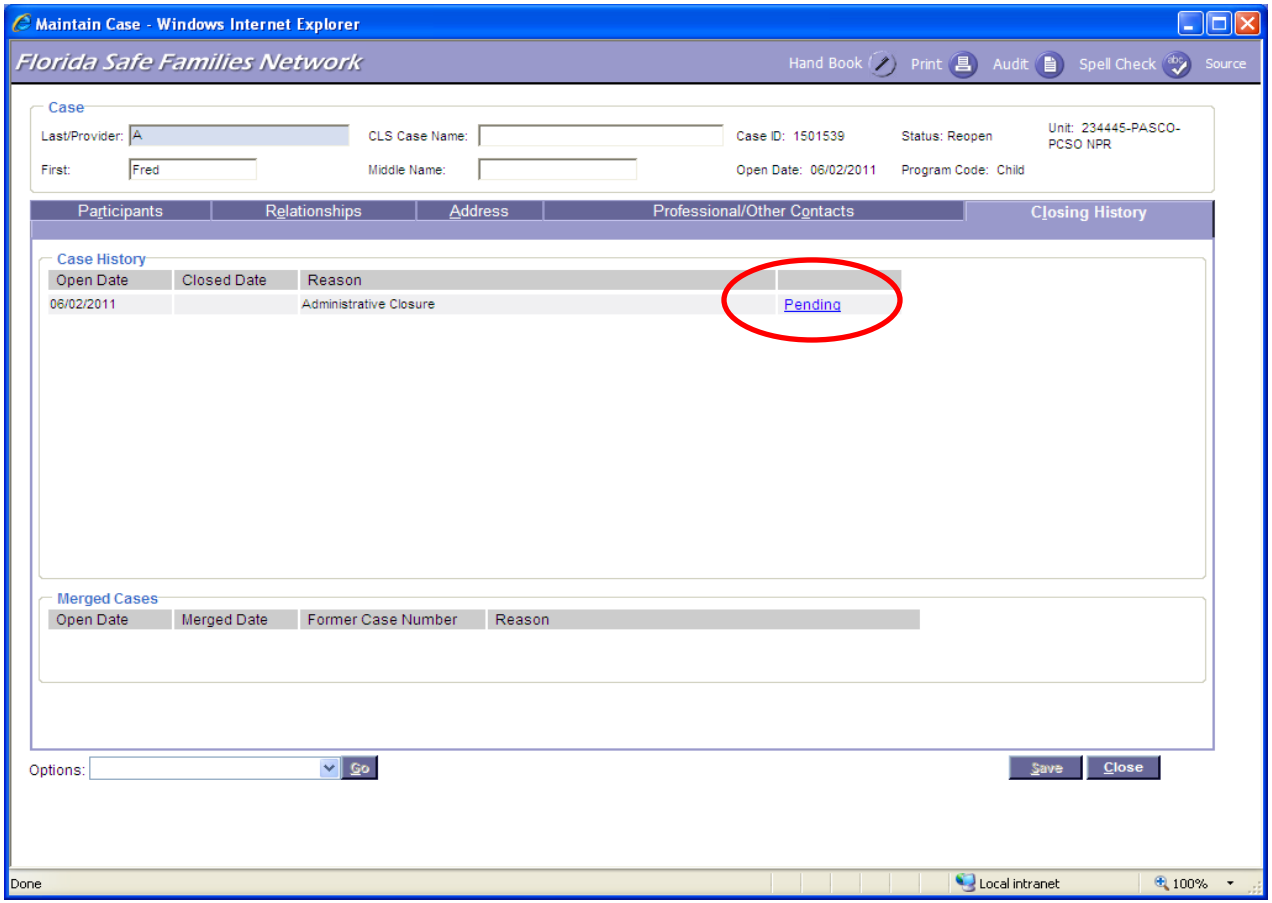
Closing a Case

This will return you to the “Case Closure” screen; The “Closure Status” will say “Closure Requested”, Click “Close”



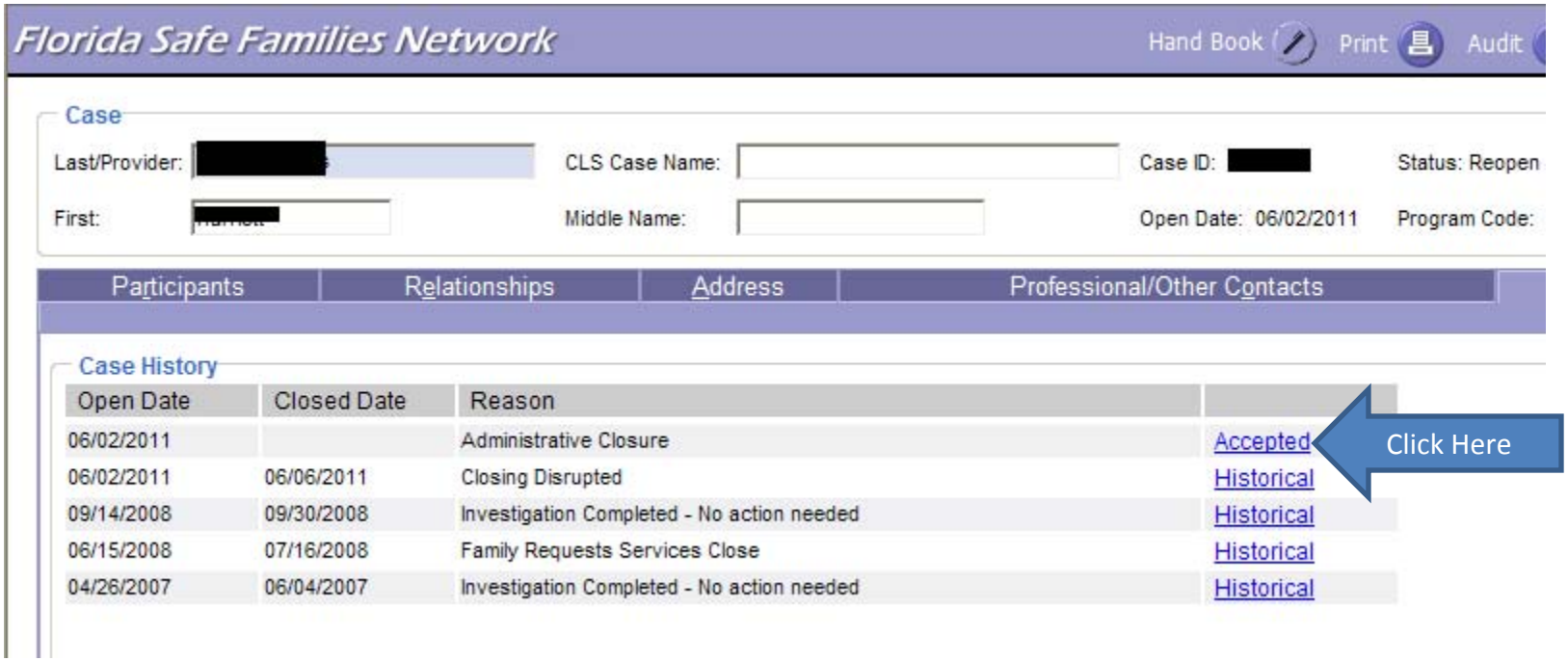
Closing a Case

A new row will be inserted in the Case History group box with an associated “Pending” hyperlink. Once it passes the necessary edits successfully the “Pending” hyperlink will change to an “Accepted” hyperlink (takes up to an hour)



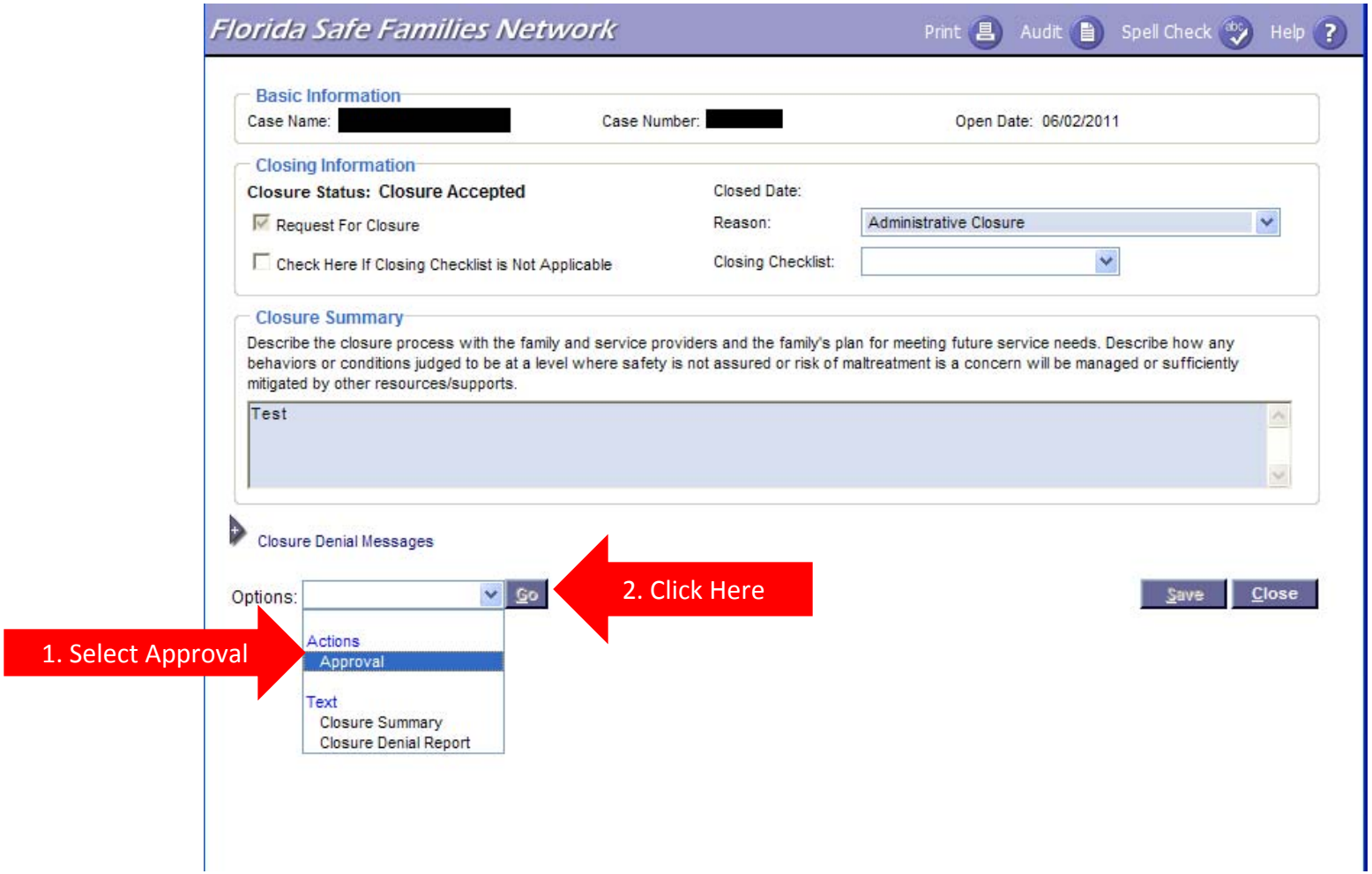
Closing a Case

Once the hyperlink shows “Accepted,” click the “Accepted” hyperlink;



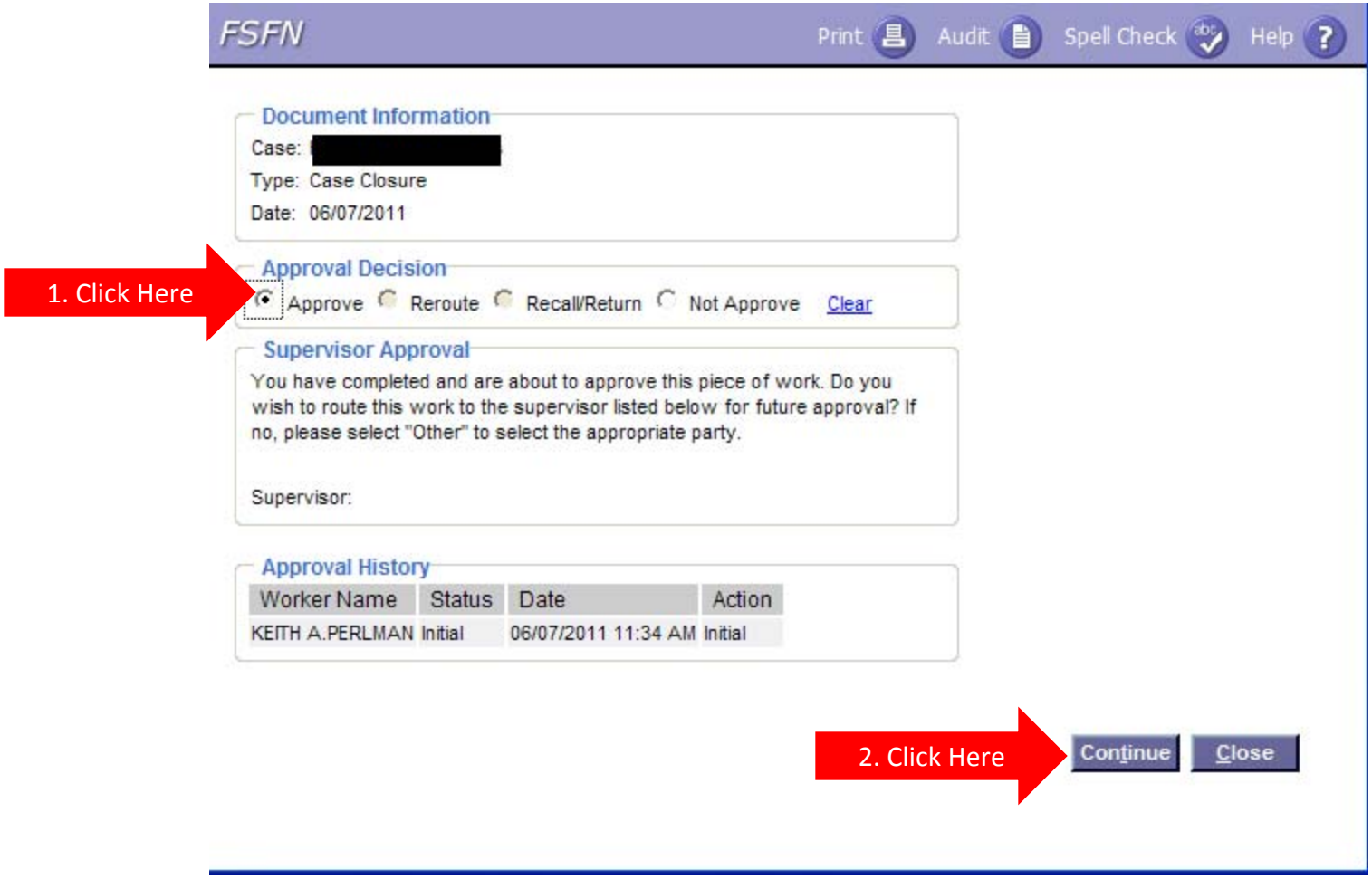
Closing a Case

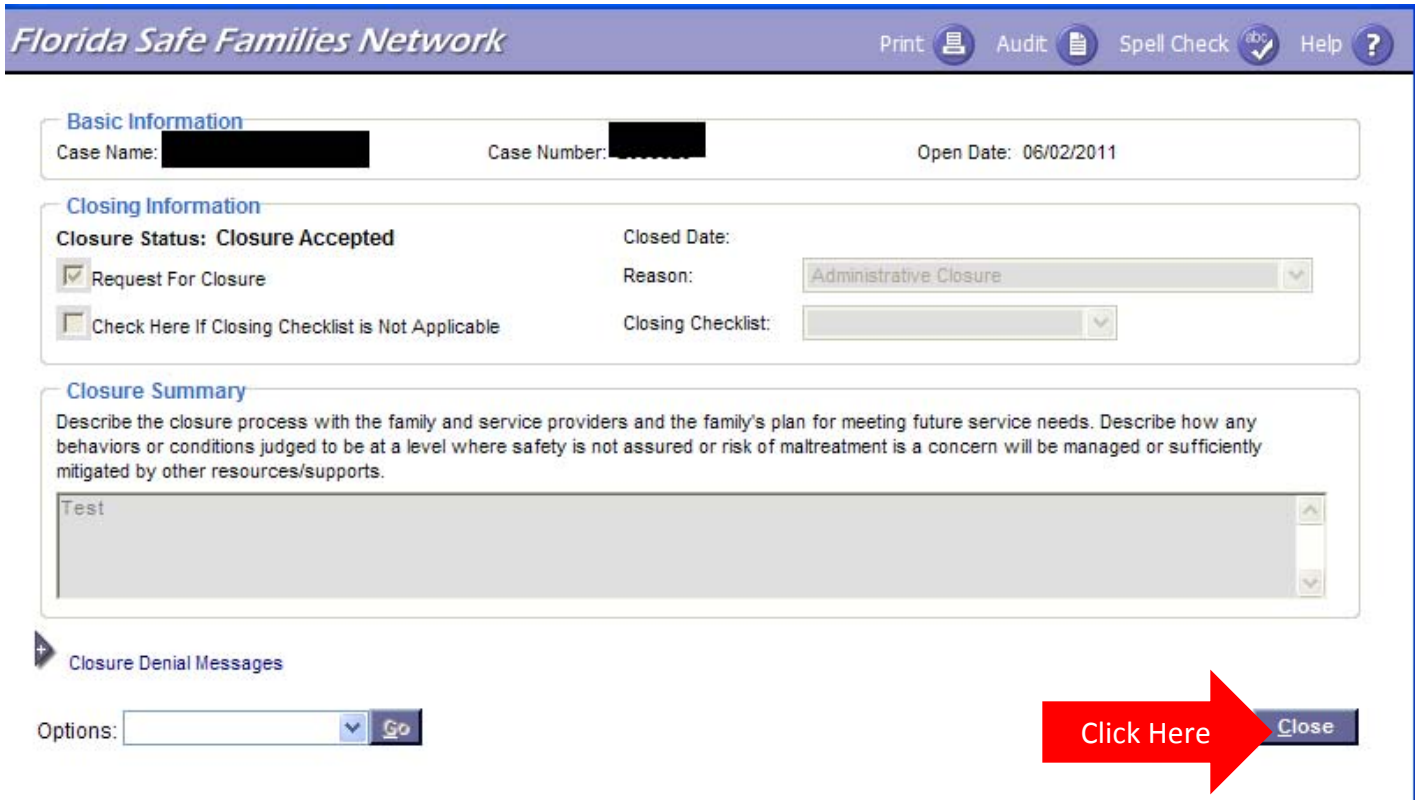
From the “Options” drop down box select “Approval” and click “Go”



Closing a Case

Select the “Approve” radio button and click “Continue”



Closing a Case

Click “Close”