

Request for Action (RFA) Process

This section provides instruction in the following four areas:

1. Job Class and Security User Group in FSFN
2. Creating a Case Note without an RFA in an Open or Closed Case
 - Search by Person or Case
 - Create a Case Note
3. 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
4. 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

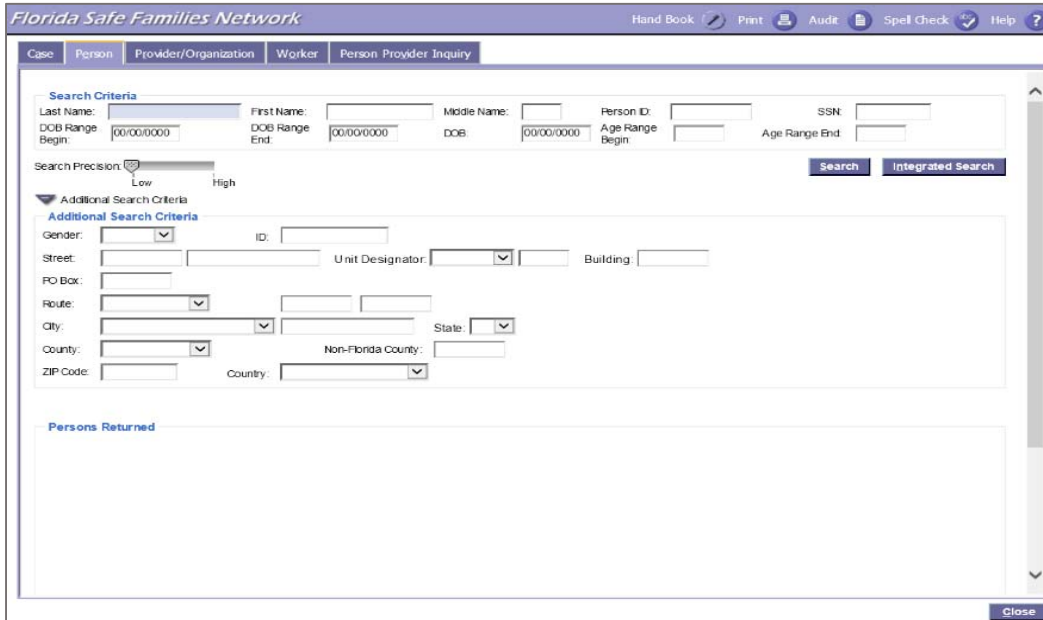
Job Class and Security Profile

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:**

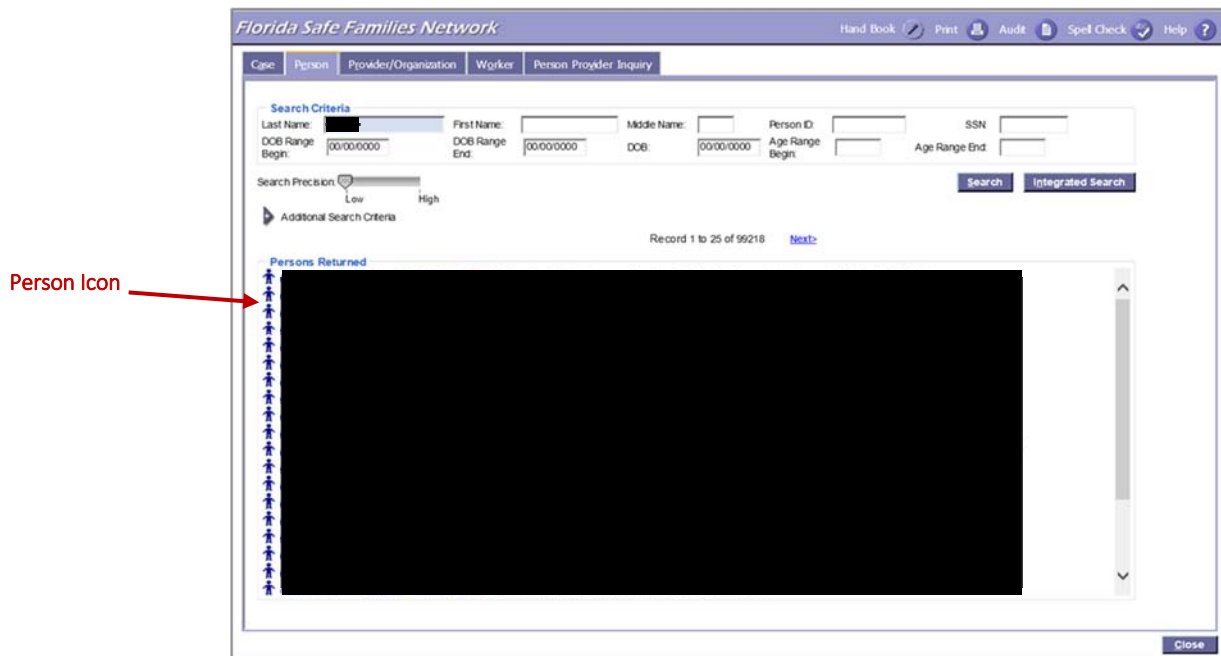
- DCF Staff: DCF Program Specialist Job Class and DCF Program Specialist Security User Group
- CBC Staff: Child Case Specialist Job Class and Child Case Specialist Security User Group

Search by Person

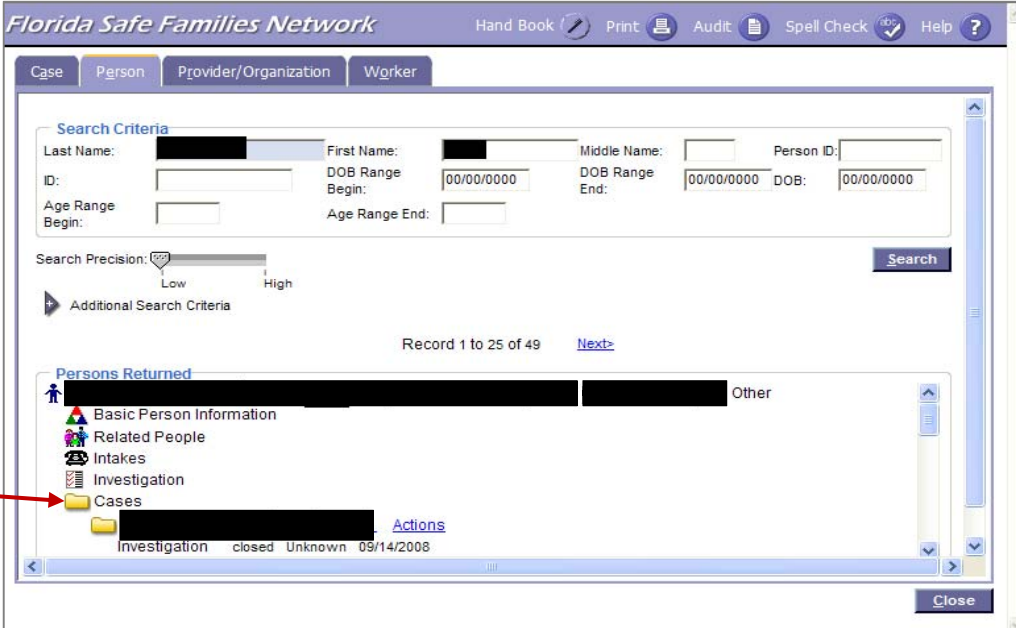
Log in to FSFN and Click the *Search* Icon. Select the *Person* tab. Enter as much information known on person and click *Search*.



Click the *Person* Icon to select the appropriate person.



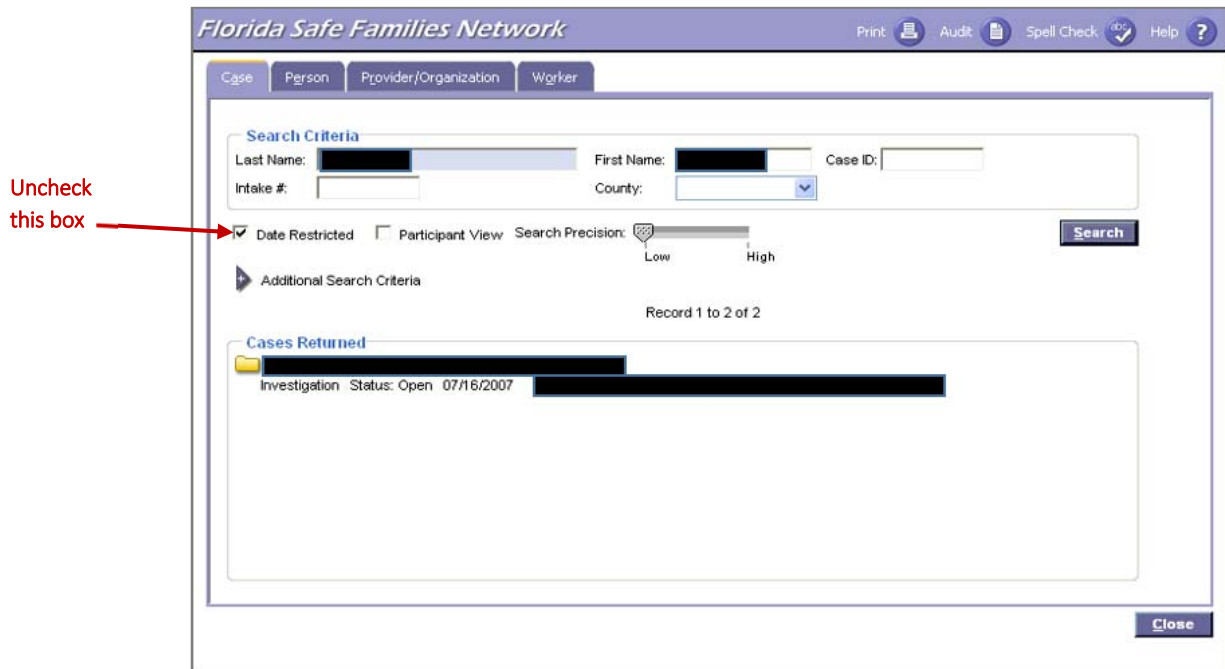
Click the *Case* Icon to view all cases associated with the person.



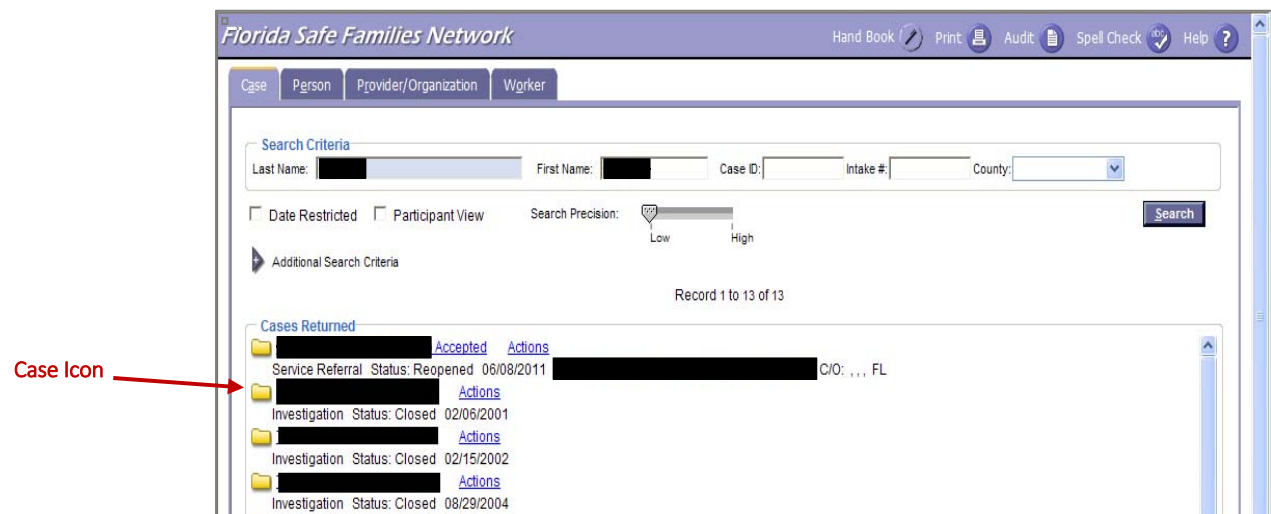
The screenshot displays the Florida Safe Families Network application interface. At the top, there are navigation tabs for 'Case', 'Person', 'Provider/Organization', and 'Worker'. Below these is a search criteria section with fields for Last Name, First Name, Middle Name, Person ID, ID, DOB Range (Begin/End), Age Range (Begin/End), and DOB. A 'Search' button is located to the right of the search criteria. Below the search criteria is a 'Search Precision' slider set to 'Low' and an 'Additional Search Criteria' section. The main area shows 'Persons Returned' with a list of search results. A red arrow labeled 'Case Icon' points to a folder icon labeled 'Cases' in the list. Below the 'Cases' folder, there is a table with one row: 'Investigation closed Unknown 09/14/2008'. An 'Actions' link is visible next to the table row. The interface also includes a 'Close' button at the bottom right.

Search by Case

Log in to FSFN and Click *Search* Icon. Select the *Case* tab. Enter the *Case Name* (LN and FN), *Case ID*, or *Intake Number*. Uncheck the *Date Restricted* box to begin search.

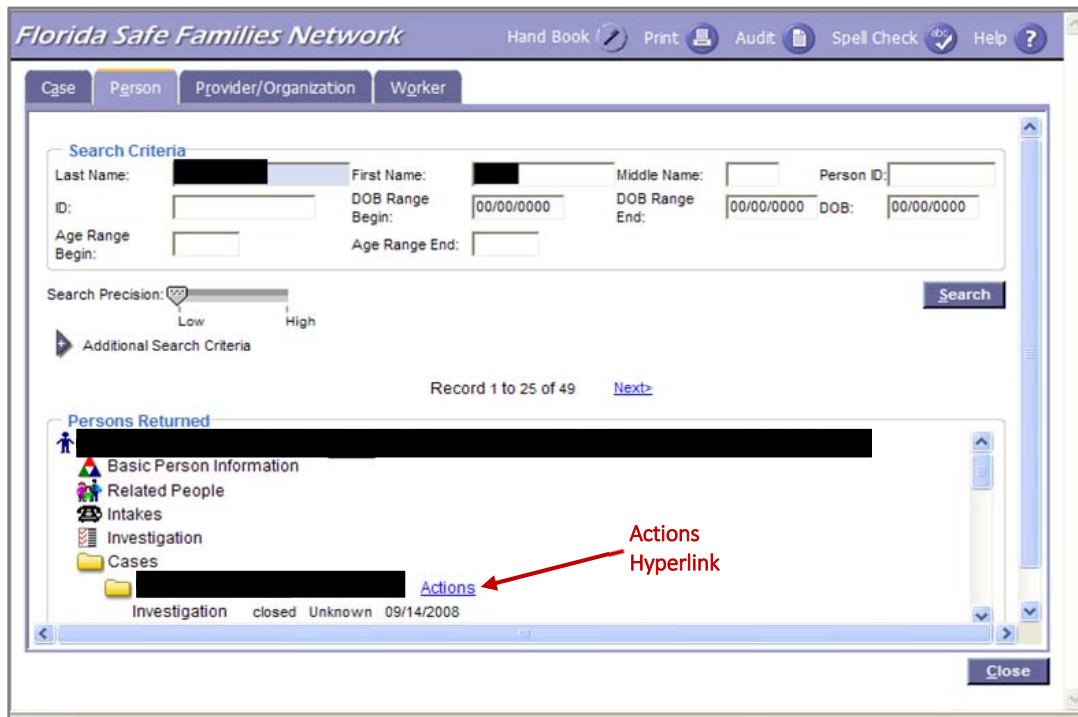


Click the *Case* Icon next to the desired Case to see casework activity.

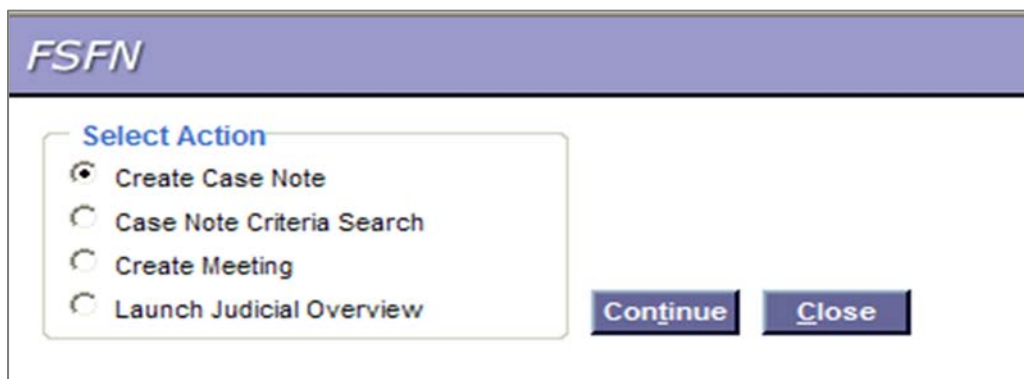


Create an RFA/Case Note

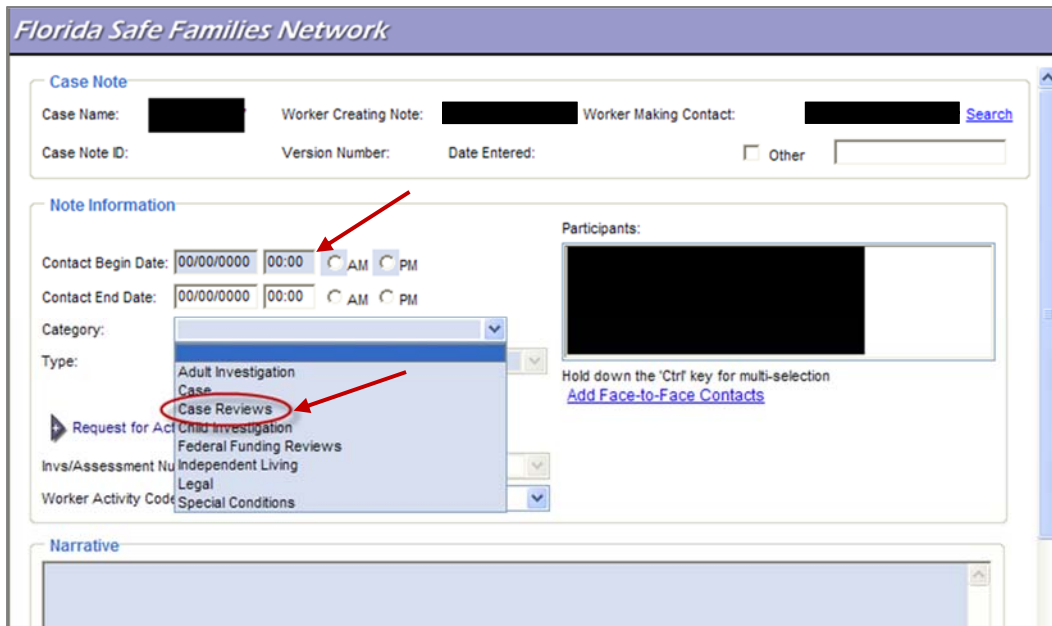
The RFA is created in case notes through the *Actions* hyperlink. Click the *Actions* hyperlink next to the case in which the note is to be entered.



Select the *Create Case Note* radio button and click *Continue*.



Enter the *Contact Begin Date and Time* and select *Case Reviews* from the *Category* drop down box.



Florida Safe Families Network

Case Note

Case Name: [Redacted] Worker Creating Note: [Redacted] Worker Making Contact: [Redacted] [Search](#)

Case Note ID: [Redacted] Version Number: [Redacted] Date Entered: [Redacted] Other [Redacted]

Note Information

Contact Begin Date: 00/00/0000 00:00 AM PM

Contact End Date: 00/00/0000 00:00 AM PM

Category: Case Reviews

Type:

- Adult Investigation Case
- Case Reviews
- Child Investigation
- Federal Funding Reviews
- Independent Living
- Legal
- Special Conditions

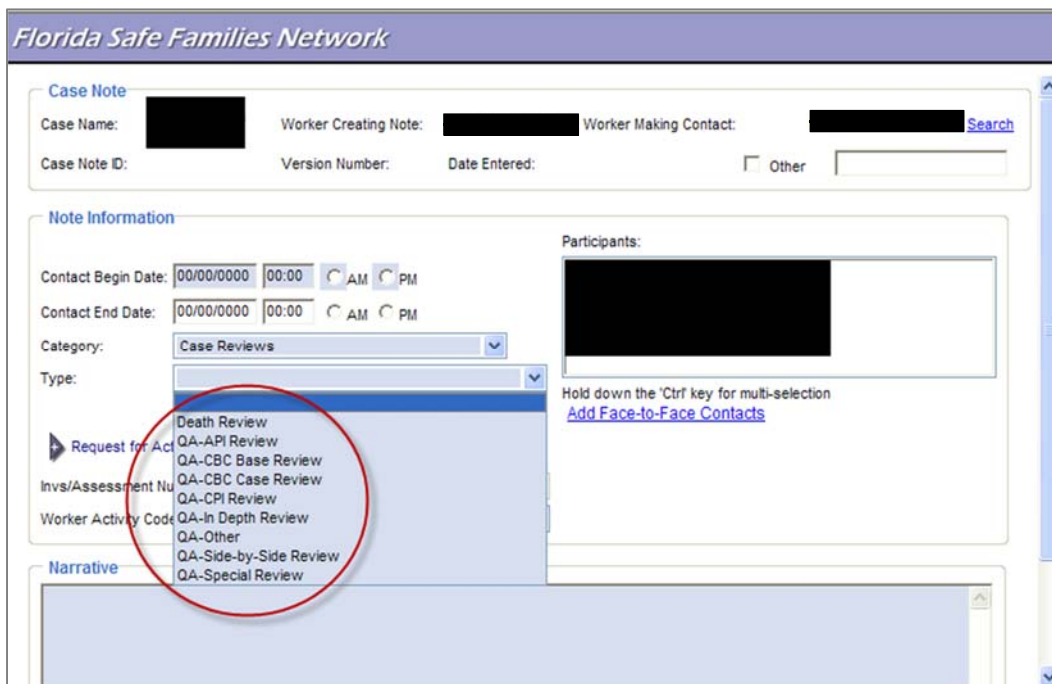
Participants: [Redacted]

Hold down the 'Ctrl' key for multi-selection
[Add Face-to-Face Contacts](#)

Narrative

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.



Florida Safe Families Network

Case Note

Case Name: [Redacted] Worker Creating Note: [Redacted] Worker Making Contact: [Redacted] [Search](#)

Case Note ID: [Redacted] Version Number: [Redacted] Date Entered: [Redacted] Other [Redacted]

Note Information

Contact Begin Date: 00/00/0000 00:00 AM PM

Contact End Date: 00/00/0000 00:00 AM PM

Category: Case Reviews

Type:

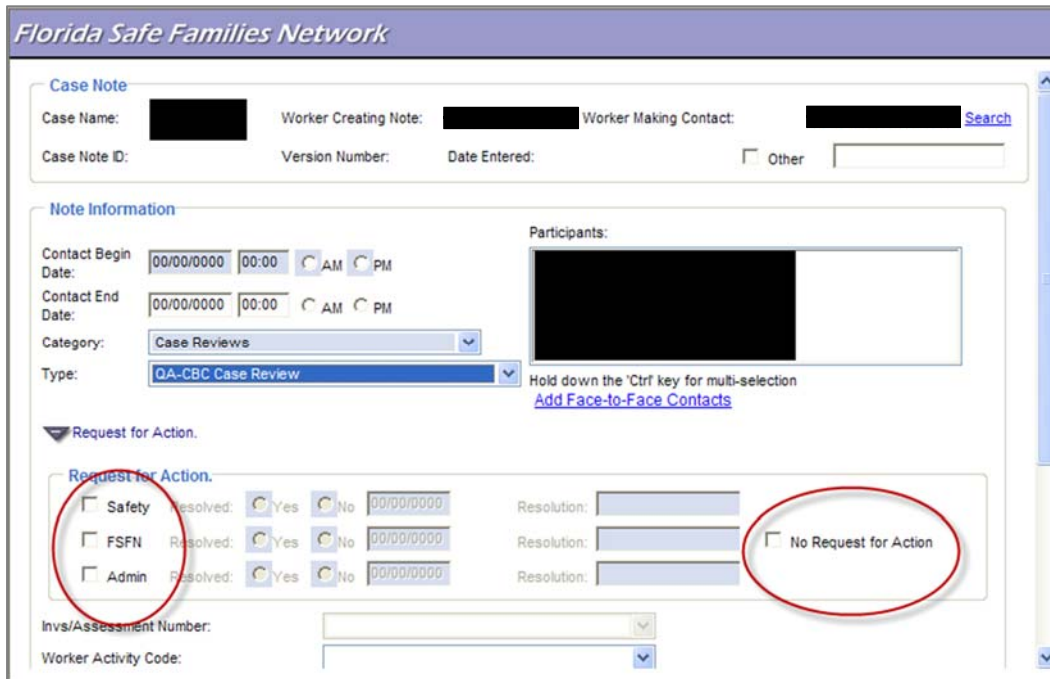
- Death Review
- QA-API Review
- QA-CBC Base Review
- QA-CBC Case Review
- QA-CPI Review
- QA-In Depth Review
- QA-Other
- QA-Side-by-Side Review
- QA-Special Review

Participants: [Redacted]

Hold down the 'Ctrl' key for multi-selection
[Add Face-to-Face Contacts](#)

Narrative

Select the appropriate RFA(s) or 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.



Florida Safe Families Network

Case Note

Case Name: [Redacted] Worker Creating Note: [Redacted] Worker Making Contact: [Redacted] Search

Case Note ID: [Redacted] Version Number: [Redacted] Date Entered: [Redacted] Other [Redacted]

Note Information

Contact Begin Date: 00/00/0000 00:00 AM/PM
Contact End Date: 00/00/0000 00:00 AM/PM
Category: Case Reviews
Type: QA-CBC Case Review

Participants: [Redacted]

Hold down the 'Ctrl' key for multi-selection
[Add Face-to-Face Contacts](#)

Request for Action.

Request for Action.

Safety Resolved: Yes No 00/00/0000 Resolution: [Redacted]

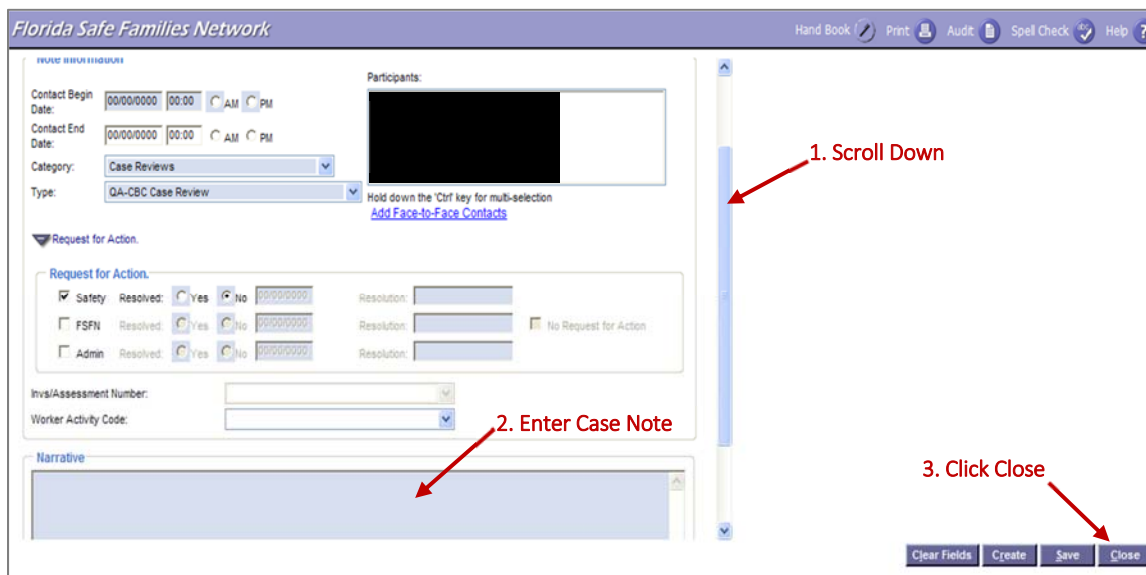
FSN Resolved: Yes No 00/00/0000 Resolution: [Redacted]

Admin Resolved: Yes No 00/00/0000 Resolution: [Redacted]

No Request for Action

Invs/Assessment Number: [Redacted]
Worker Activity Code: [Redacted]

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.



Florida Safe Families Network

Hand Book Print Audit Spell Check Help ?

Request for Action.

Request for Action.

Safety Resolved: Yes No 00/00/0000 Resolution: [Redacted]

FSN Resolved: Yes No 00/00/0000 Resolution: [Redacted]

Admin Resolved: Yes No 00/00/0000 Resolution: [Redacted]

No Request for Action

Invs/Assessment Number: [Redacted]
Worker Activity Code: [Redacted]

Narrative

1. Scroll Down

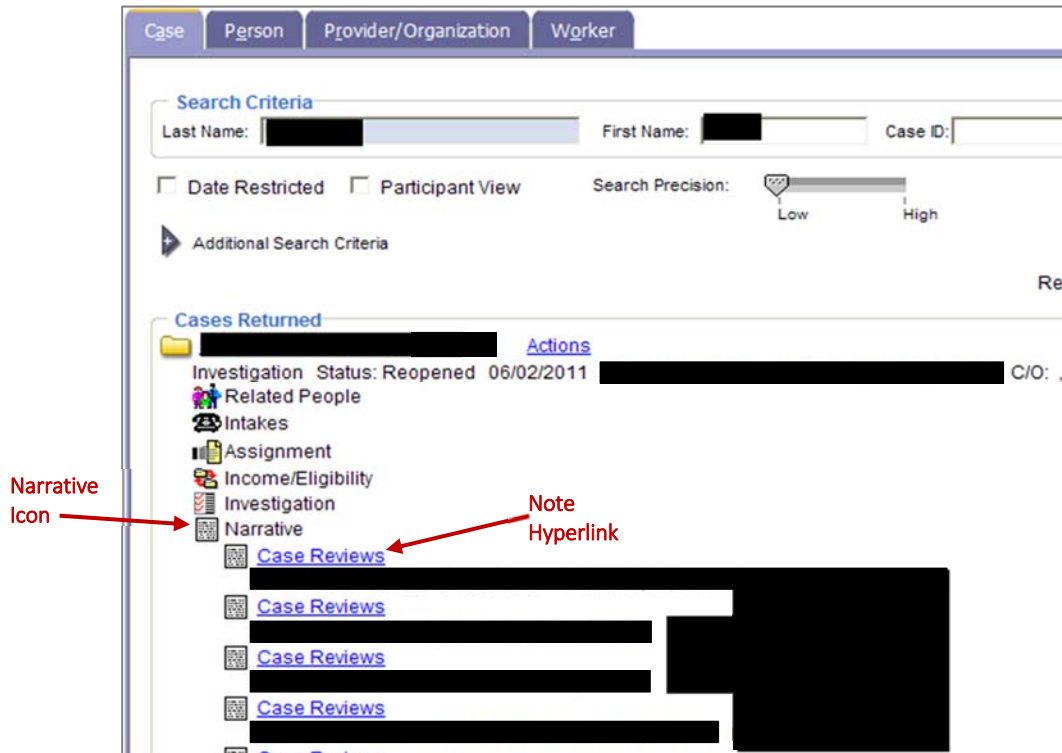
2. Enter Case Note

3. Click Close

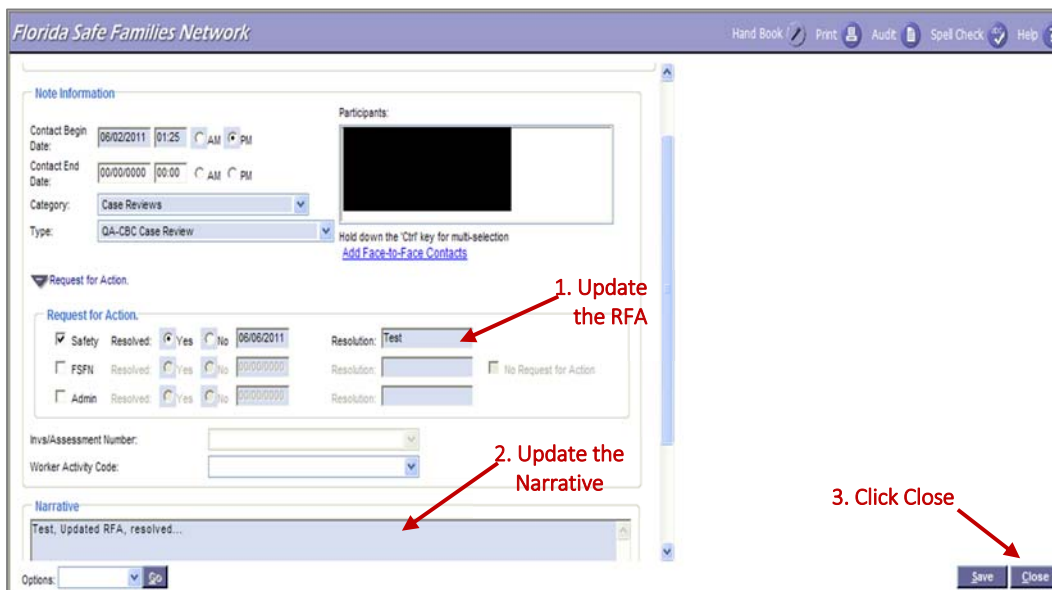
Clear Fields Create Save Close

Update an RFA/Case Note

Click the *Narrative* Icon to display the Notes history. Click the hyperlink of the note you want to update.

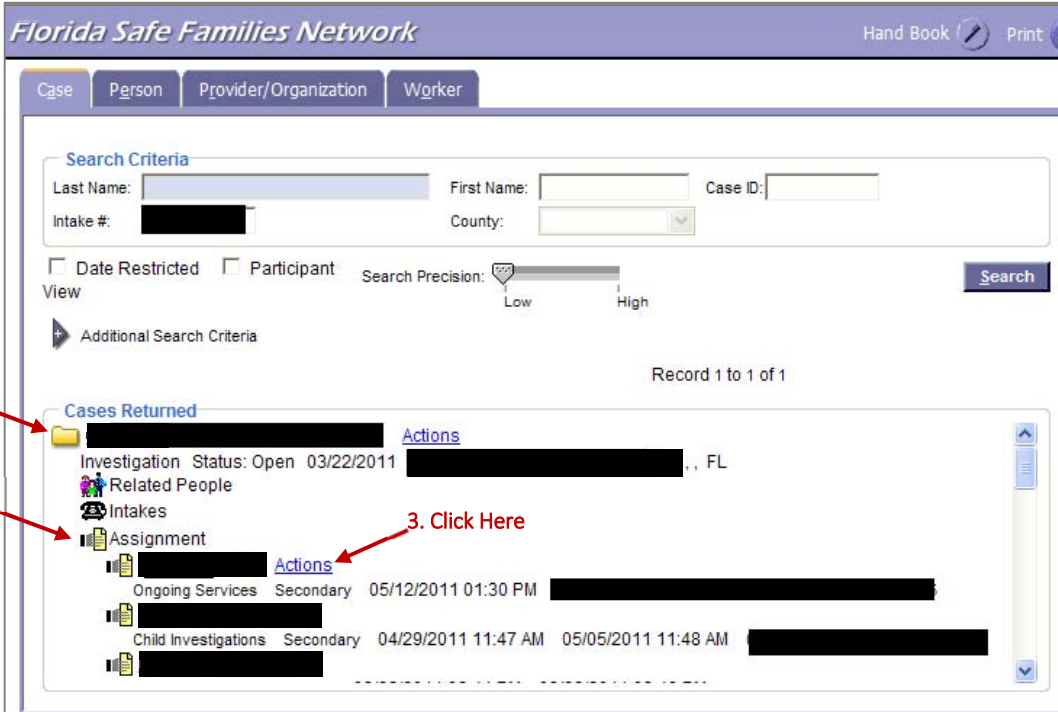


Update the Note as Appropriate and click *Close*. Select Yes when asked if you want to save changes.



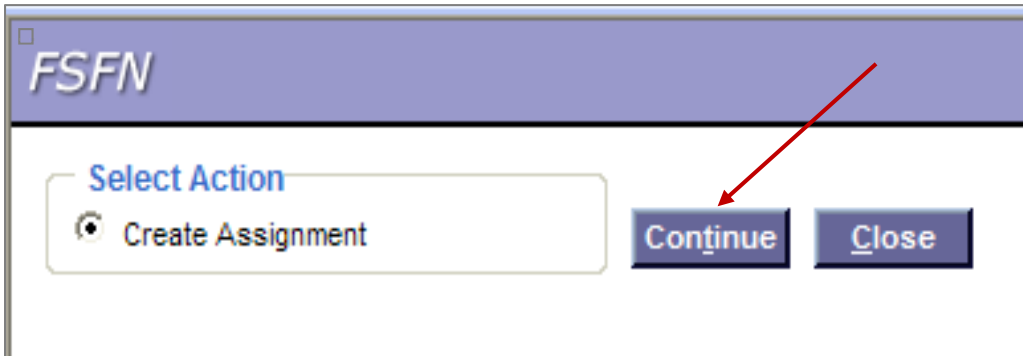
Assignment to a Case

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.



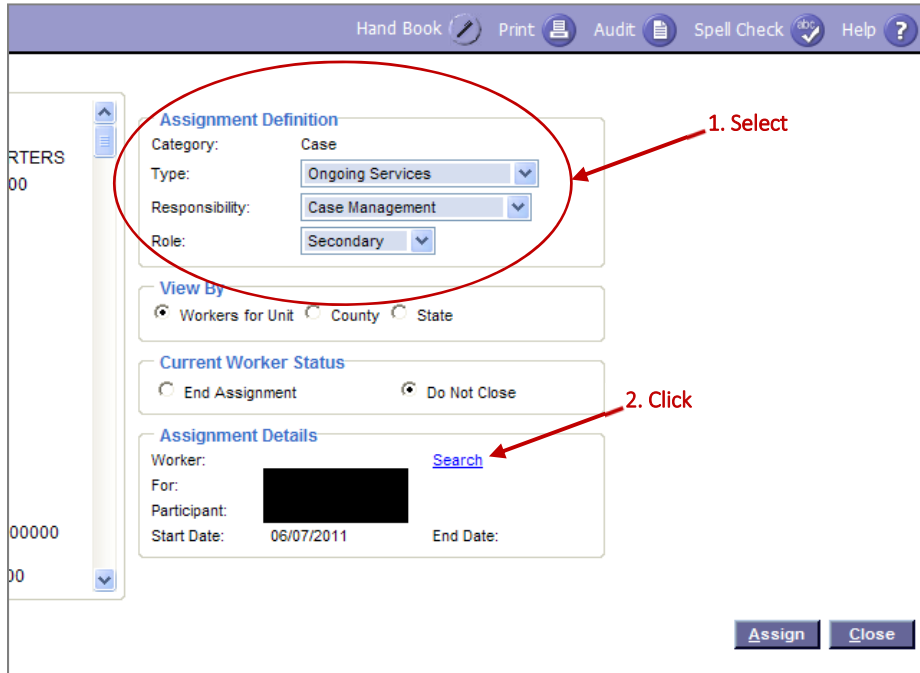
The screenshot shows the Florida Safe Families Network interface. At the top, there are tabs for 'Case', 'Person', 'Provider/Organization', and 'Worker'. Below these is a search criteria section with fields for 'Last Name', 'First Name', 'Case ID', 'Intake #', and 'County'. There are also checkboxes for 'Date Restricted' and 'Participant', and a 'Search Precision' slider. A 'Search' button is located to the right. Below the search criteria, there is a 'Cases Returned' section. A red arrow labeled '1. Click Here' points to a folder icon next to a case entry. Another red arrow labeled '2. Click Here' points to the 'Assignment' icon within that case's details. A third red arrow labeled '3. Click Here' points to the 'Actions' hyperlink next to an assignment entry. The case details include 'Investigation Status: Open 03/22/2011', 'Related People', 'Intakes', and a list of assignments with dates and times.

Select *Continue*.

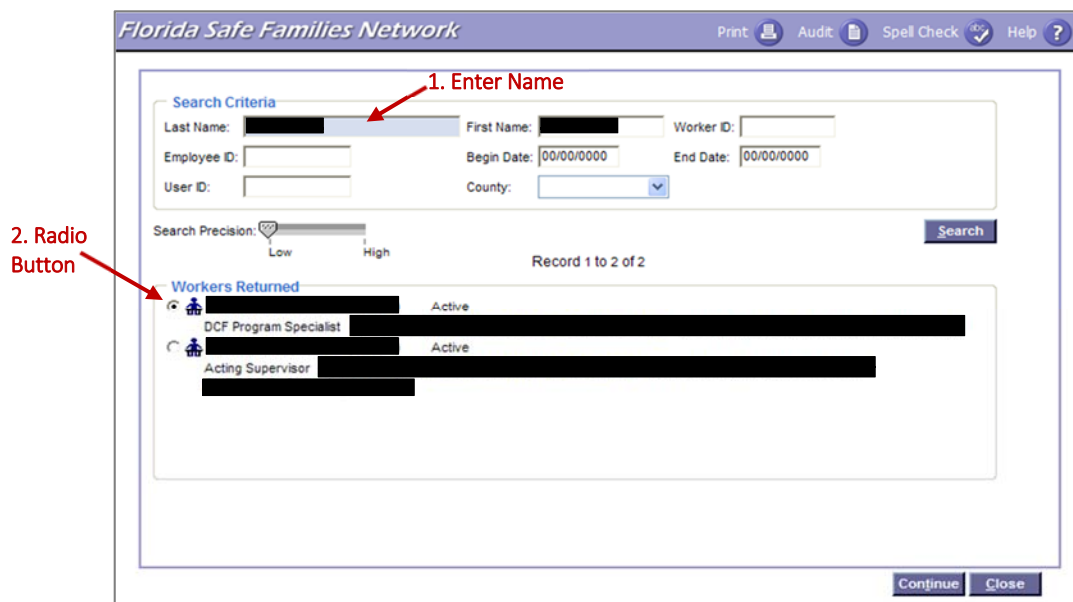


The screenshot shows a dialog box titled 'Select Action' with the FSFN logo at the top. Inside the dialog, there is a radio button next to the text 'Create Assignment'. To the right of the dialog are two buttons: 'Continue' and 'Close'. A red arrow points from the 'Continue' button towards the top right corner of the dialog box.

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 the *Assignment Details* box, click the *Search* hyperlink. Ignore the *View By* and *Current Worker Status* sections.



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



Click *Assign*.

Hand Book / Print / Audit / Spell Check / Help

Assignment Definition
Category: Case
Type: Ongoing Services
Responsibility: Case Management
Role: Secondary

View By
 Workers for Unit County State

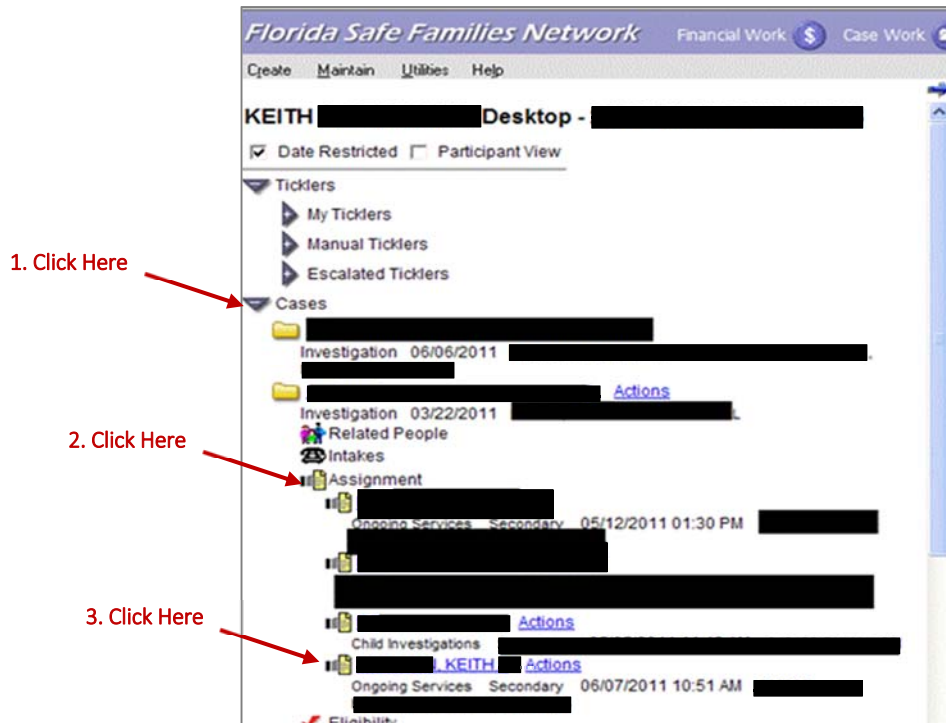
Current Worker Status
 End Assignment Do Not Close

Assignment Details
Worker: [Redacted] [Search](#)
For: [Redacted]
Participant: [Redacted]
Start Date: [Redacted] End Date: [Redacted]

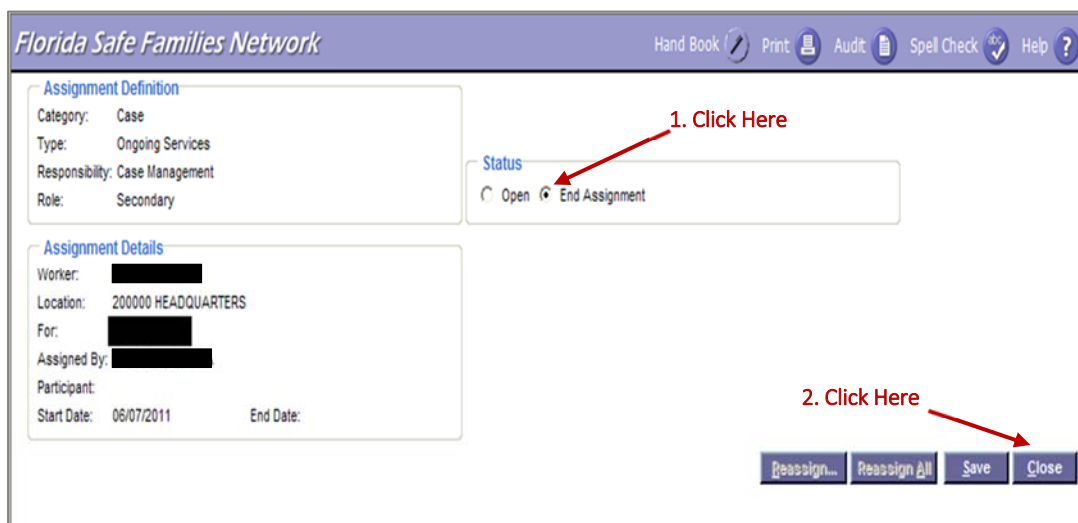
Click Here → **Assign** **Close**

End Assignment

Click *Case Folder* Icon from FSFN desktop. Click *Assignment Folder*. Click your *name* hyperlink associated with your active assignment.



Select the *End Assignment* Radio Button and click *Close*. Click *Yes* when asked to save changes before closing page.

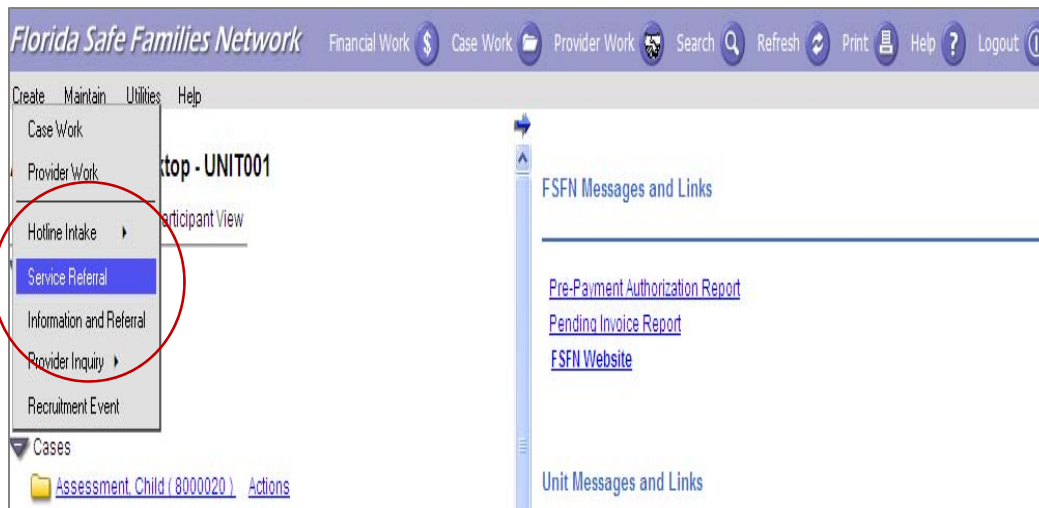


Re-Open a Case for Administrative Purposes

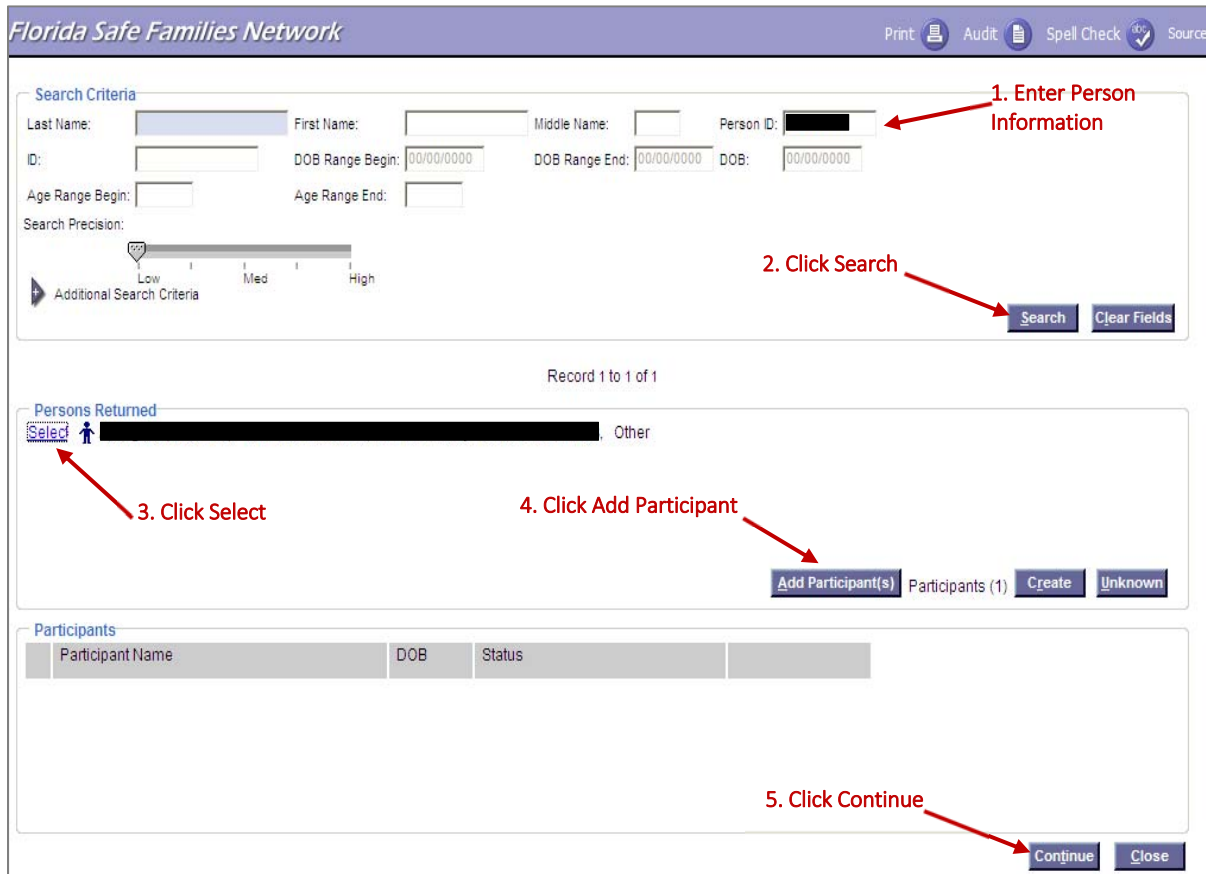
It is only necessary to Re-Open a closed case to enter a case note in the following circumstances:

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

Click the *Create* menu item and select *Service Referral*.



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 and click the *Continue* button.



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Search Criteria

Last Name: First Name: Middle Name: Person ID: **1. Enter Person Information**

ID: DOB Range Begin: 00/00/0000 DOB Range End: 00/00/0000 DOB: 00/00/0000

Age Range Begin: Age Range End:

Search Precision: Low Med High

Additional Search Criteria **2. Click Search** Search Clear Fields

Record 1 to 1 of 1

Persons Returned

Select Other **3. Click Select**

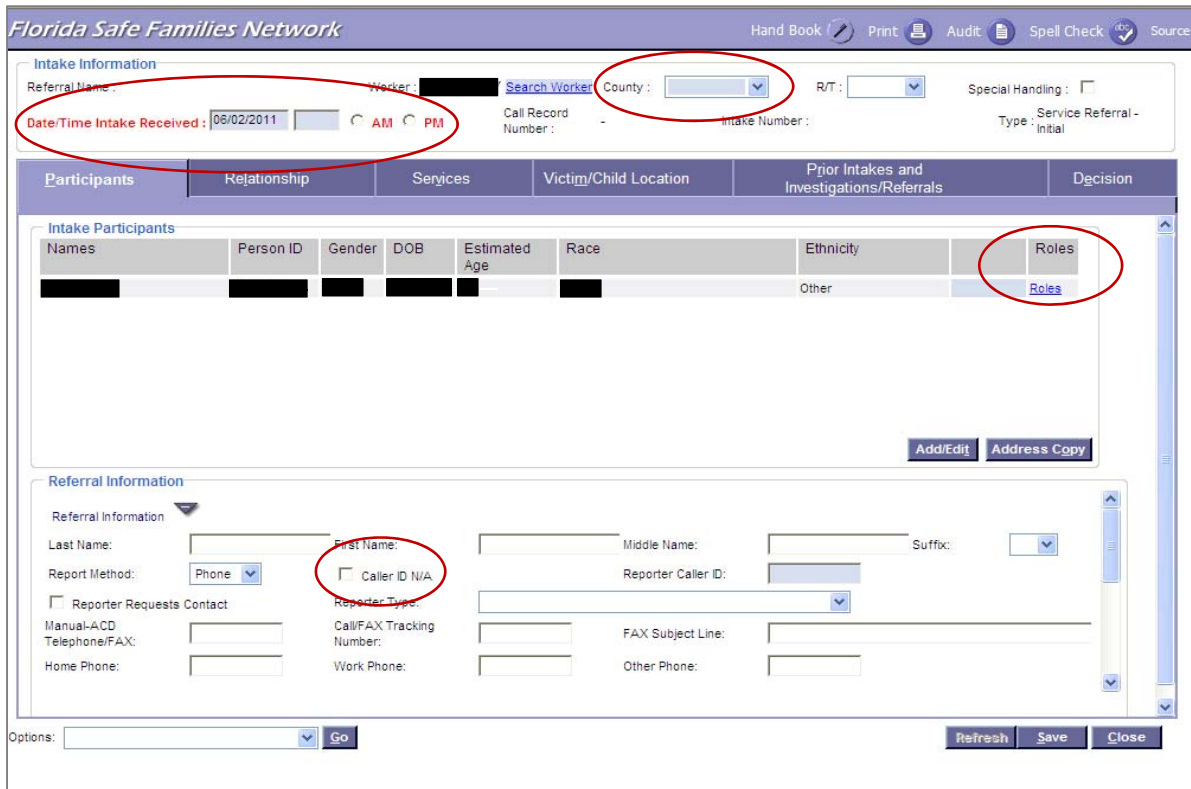
4. Click Add Participant Add Participant(s) Participants (1) Create Unknown

Participants

Participant Name	DOB	Status
------------------	-----	--------

5. Click Continue Continue Close

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; select *Referral Name* and click the *Continue* button to return to the *Participants* tab. Open the *Referral Information* expand and select the *Caller ID N/A* check box.



Florida Safe Families Network

Hand Book | Print | Audit | Spell Check | Source

Intake Information

Referral Name: [Redacted] Workers: [Redacted] Search Worker: [Redacted] County: [Redacted] R/T: [Redacted] Special Handling: Call Record Number: - Intake Number: [Redacted] Type: Service Referral - Initial

Date/Time Intake Received: 08/02/2011 AM PM

Participants	Relationship	Services	Victim/Child Location	Prior Intakes and Investigations/Referrals	Decision		
Intake Participants							
Names	Person ID	Gender	DOB	Estimated Age	Race	Ethnicity	Roles
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Other	Roles

Add/Edit | Address Copy

Referral Information

Referral Information

Last Name: [Redacted] First Name: [Redacted] Middle Name: [Redacted] Suffix: [Redacted]

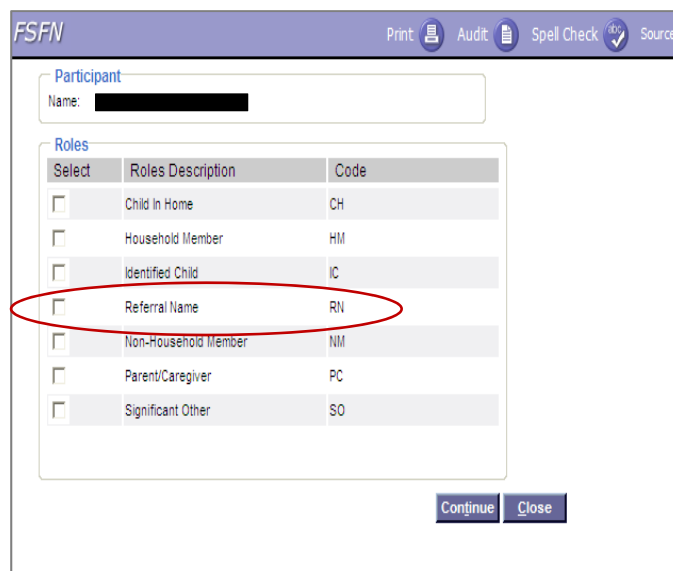
Report Method: Phone Caller ID N/A Reporter Caller ID: [Redacted]

Reporter Requests Contact Reporter Type: [Redacted]

Manual-ACD Telephone/FAX: [Redacted] Call/FAX Tracking Number: [Redacted] FAX Subject Line: [Redacted]

Home Phone: [Redacted] Work Phone: [Redacted] Other Phone: [Redacted]

Options: [Redacted] Go Refresh Save Close



FSFN Print | Audit | Spell Check | Source

Participant

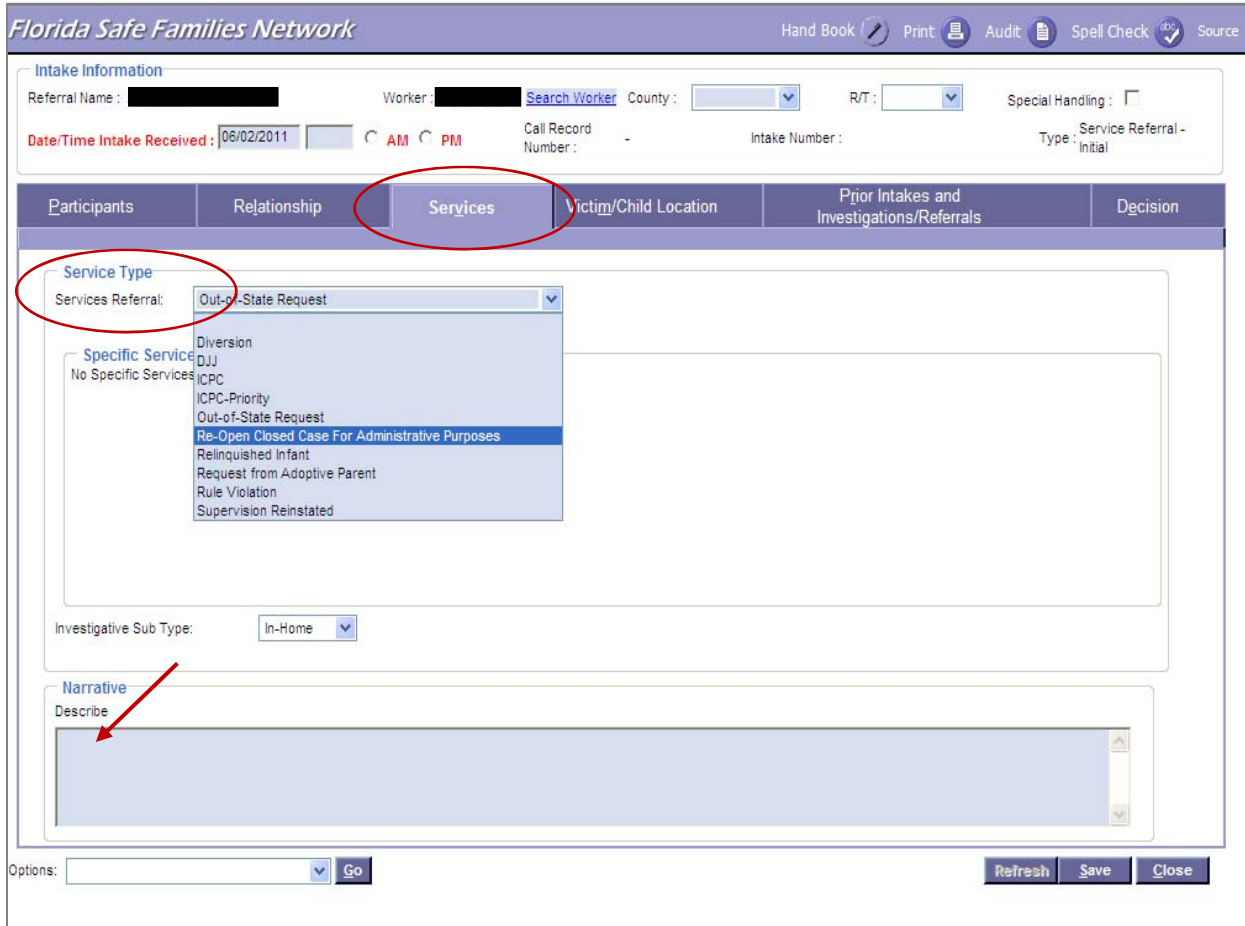
Name: [Redacted]

Roles

Select	Roles Description	Code
<input type="checkbox"/>	Child In Home	CH
<input type="checkbox"/>	Household Member	HM
<input type="checkbox"/>	Identified Child	IC
<input type="checkbox"/>	Referral Name	RN
<input type="checkbox"/>	Non-Household Member	NM
<input type="checkbox"/>	Parent/Caregiver	PC
<input type="checkbox"/>	Significant Other	SO

Continue Close

Click the *Services* tab. 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*.

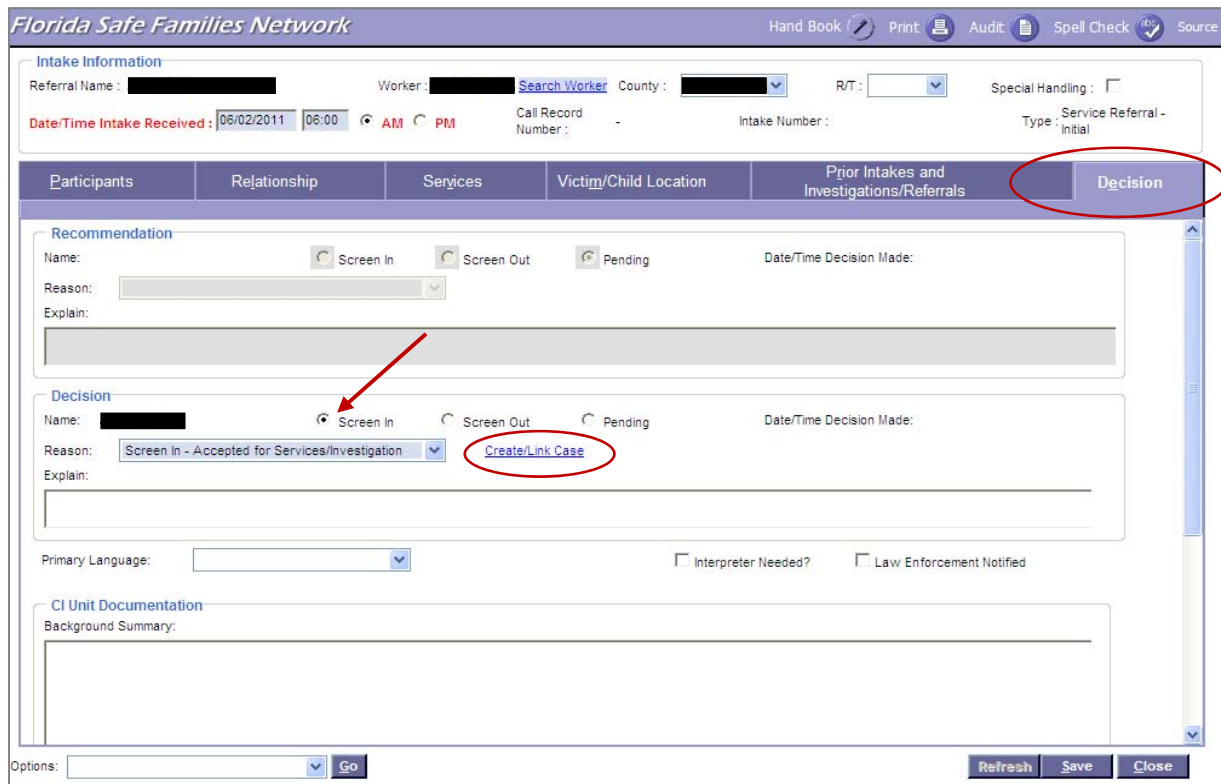


The screenshot displays the Florida Safe Families Network web application interface. At the top, there is a navigation bar with the title "Florida Safe Families Network" and utility icons for Hand Book, Print, Audit, Spell Check, and Source. Below this is the "Intake Information" section, which includes fields for Referral Name, Worker, County, R/T, Special Handling, Date/Time Intake Received (06/02/2011), AM/PM, Call Record Number, Intake Number, and Type (Service Referral - Initial).

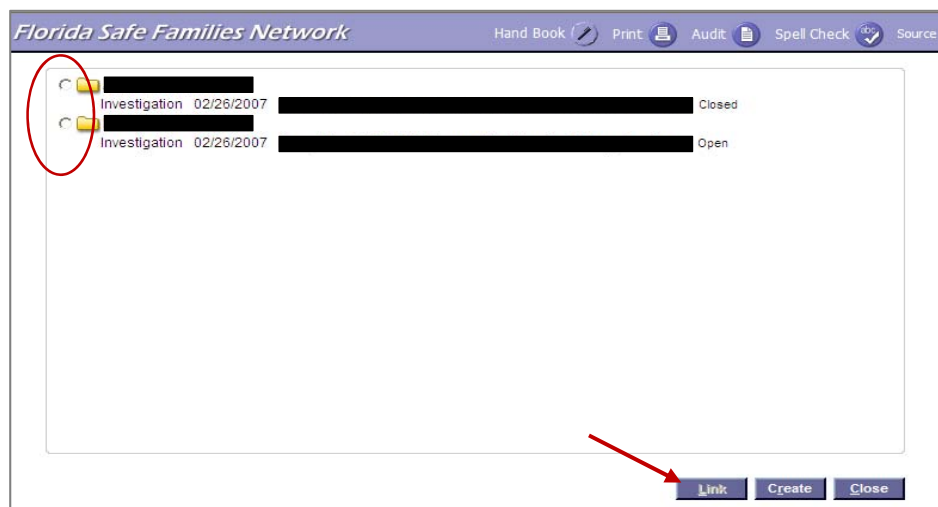
The main content area features a tabbed interface with the following tabs: Participants, Relationship, **Services** (highlighted with a red circle), Victim/Child Location, Prior Intakes and Investigations/Referrals, and Decision. The "Services" tab is active, showing a "Service Type" section with a "Services Referral" dropdown menu. The dropdown menu is open, displaying a list of options: Diversion, DJJ, ICPC, ICPC-Priority, Out-of-State Request, **Re-Open Closed Case For Administrative Purposes** (highlighted with a blue bar), Relinquished Infant, Request from Adoptive Parent, Rule Violation, and Supervision Reinstated. A red circle highlights the "Services Referral" dropdown menu.

Below the dropdown menu is the "Investigative Sub Type" dropdown menu, which is set to "In-Home". Below this is the "Narrative" section, which includes a "Describe" text field. A red arrow points to the "Describe" text field. At the bottom of the page, there is an "Options" field with a "Go" button and a "Refresh Save Close" button.

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.

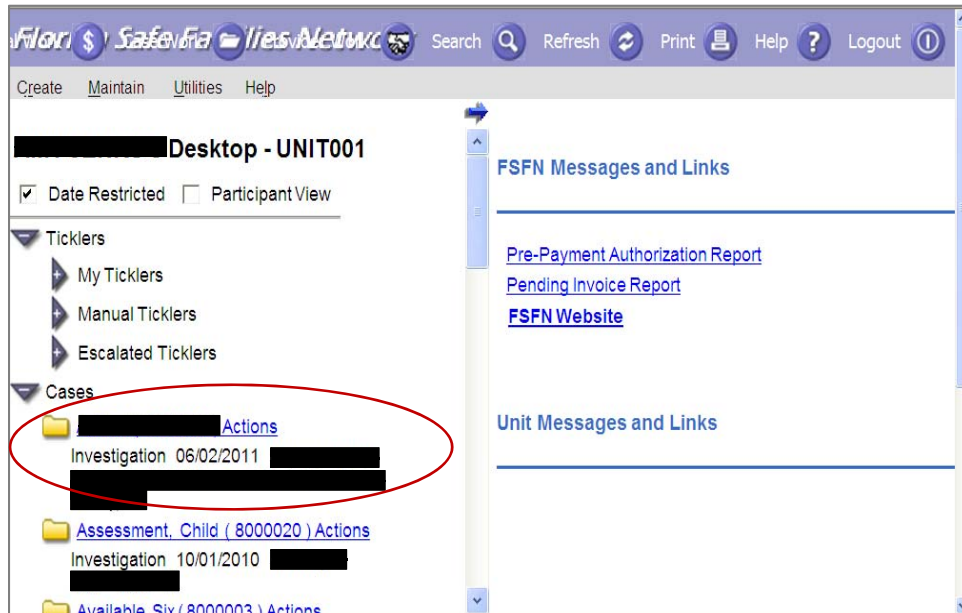


All Cases in which the intake participant is a case participant are displayed. Select the applicable radio button and click the Link button, which only becomes enabled after selecting an applicable radio button. Upon selecting the Link button the Maintain Case page is displayed.



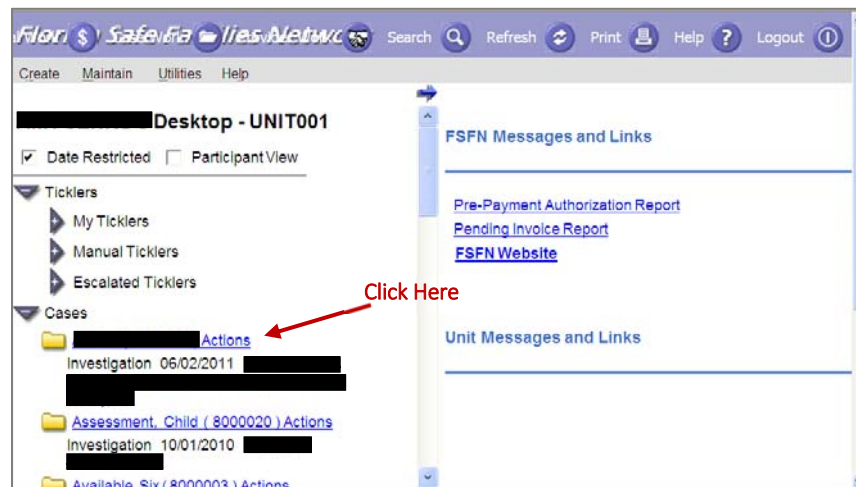
Maintain Case page

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.

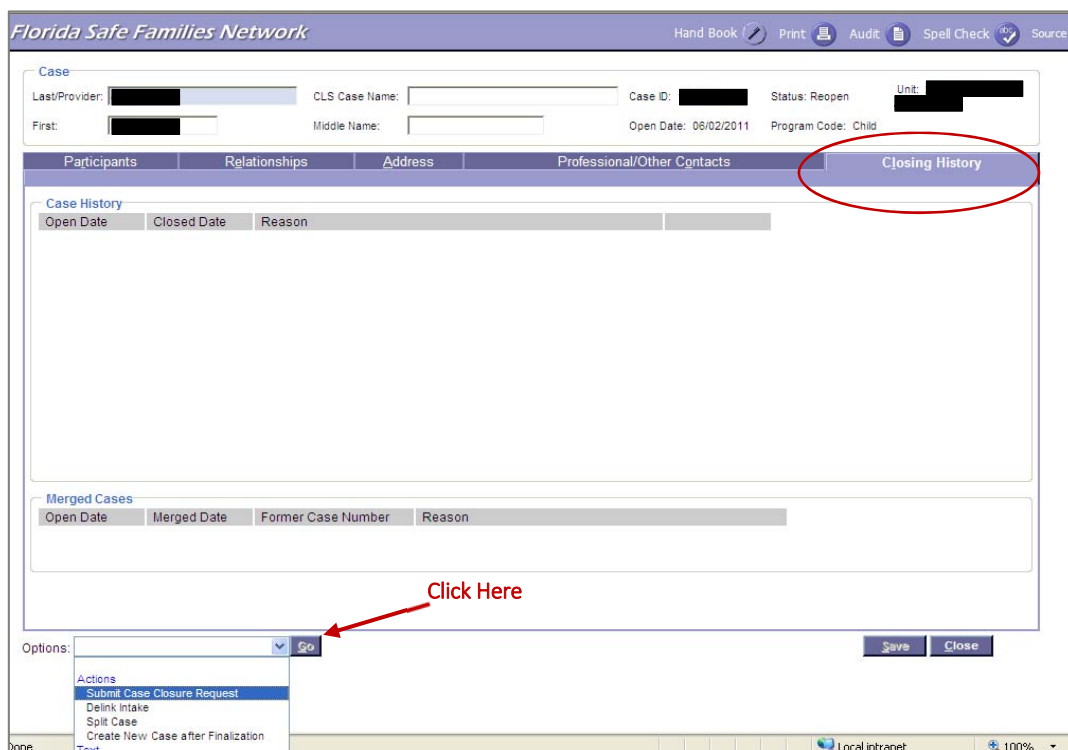


Closing a Case

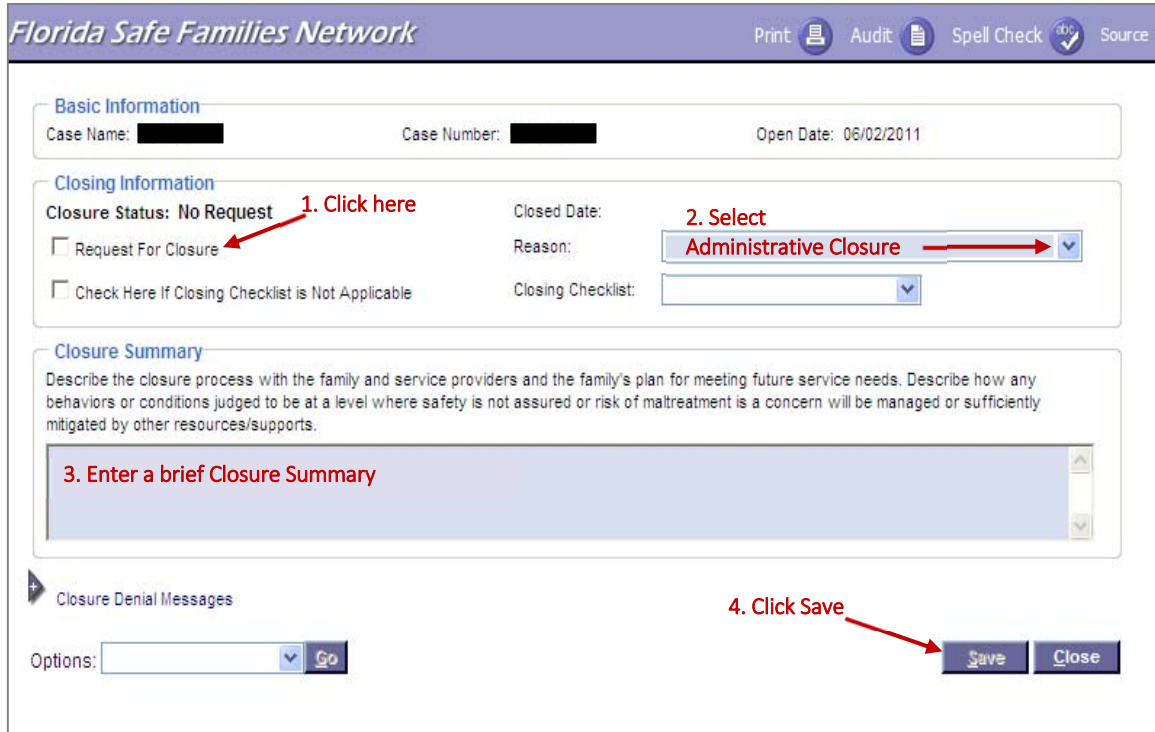
*NOTE- You should only close a case that you have re-opened to enter or update a case note. Do not close a case that you did not re-open. From your FSN desktop, click the *Case Name* hyperlink of the case you want to close-this will take you to the Maintain Case page.



From the *Maintain Case* page click the *Closing History* tab. From the *Options* drop down box select *Submit Case Closure Request*; click *Go*.



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



Florida Safe Families Network

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Basic Information
Case Name: [REDACTED] Case Number: [REDACTED] Open Date: 06/02/2011

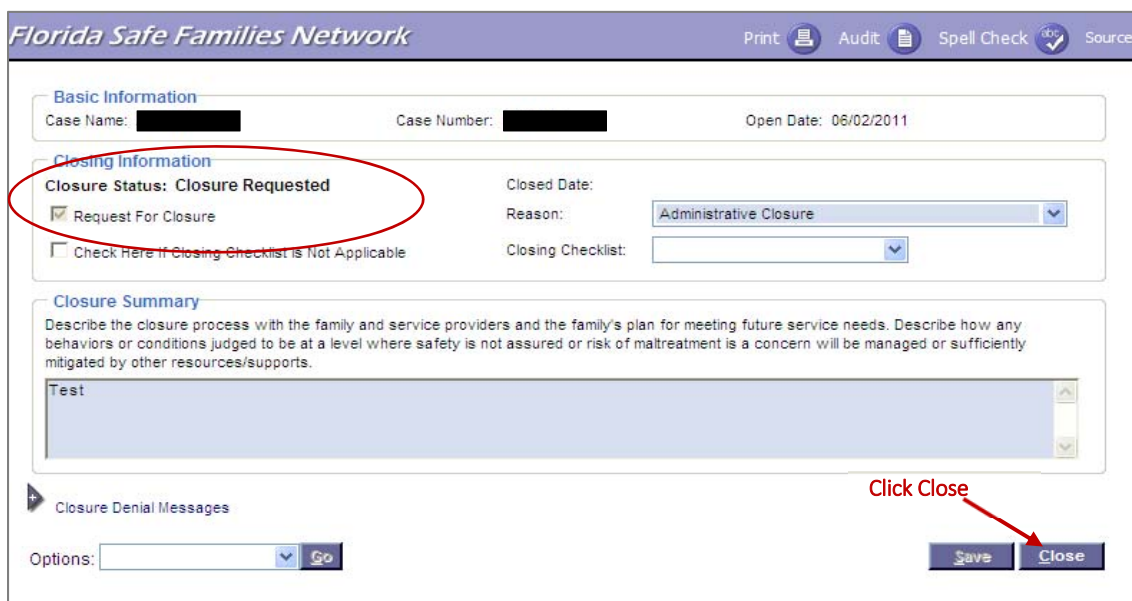
Closing Information
 Closure Status: No Request **1. Click here**
 Request For Closure
 Check Here If Closing Checklist is Not Applicable
 Closed Date: [REDACTED] Reason: **Administrative Closure** **2. Select**
 Closing Checklist: [REDACTED]

Closure Summary
 Describe the closure process with the family and service providers and the family's plan for meeting future service needs. Describe how any behaviors or conditions judged to be at a level where safety is not assured or risk of maltreatment is a concern will be managed or sufficiently mitigated by other resources/supports.
3. Enter a brief Closure Summary

Closure Denial Messages

Options: [REDACTED] Go **4. Click Save** Save Close

This will return you to the *Case Closure* screen. The *Closure Status* will say *Closure Requested*, click *Close*.



Florida Safe Families Network

Print Audit Spell Check Source

Basic Information
Case Name: [REDACTED] Case Number: [REDACTED] Open Date: 06/02/2011

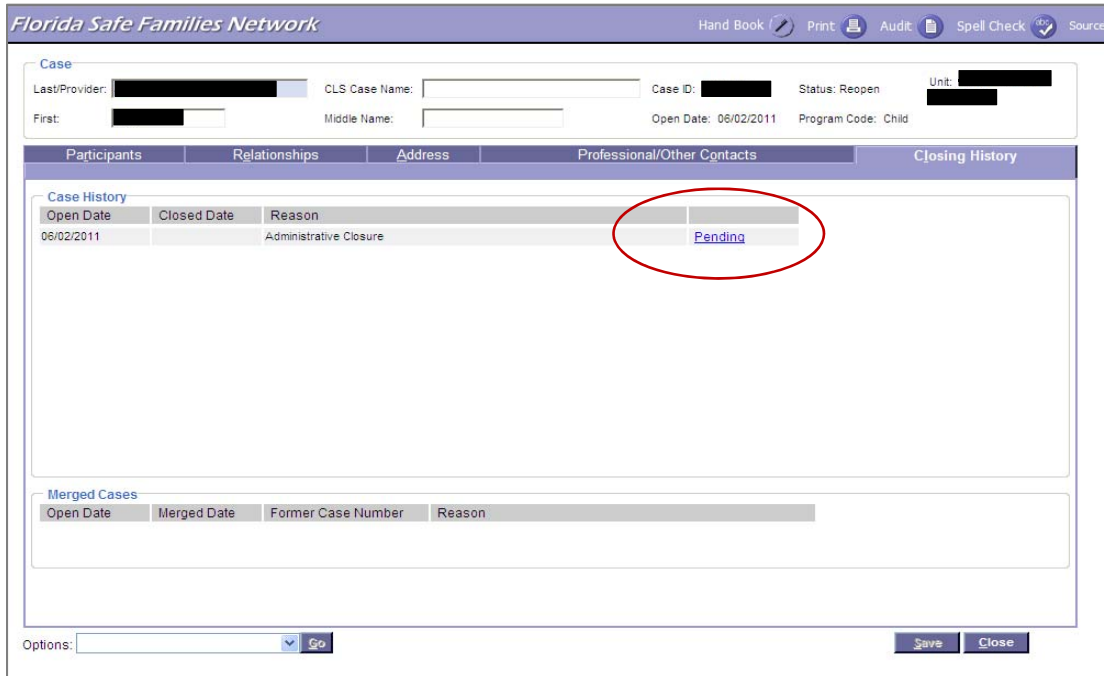
Closing Information
Closure Status: Closure Requested
 Request For Closure
 Check Here If Closing Checklist is Not Applicable
 Closed Date: [REDACTED] Reason: Administrative Closure
 Closing Checklist: [REDACTED]

Closure Summary
 Describe the closure process with the family and service providers and the family's plan for meeting future service needs. Describe how any behaviors or conditions judged to be at a level where safety is not assured or risk of maltreatment is a concern will be managed or sufficiently mitigated by other resources/supports.
 Test

Closure Denial Messages

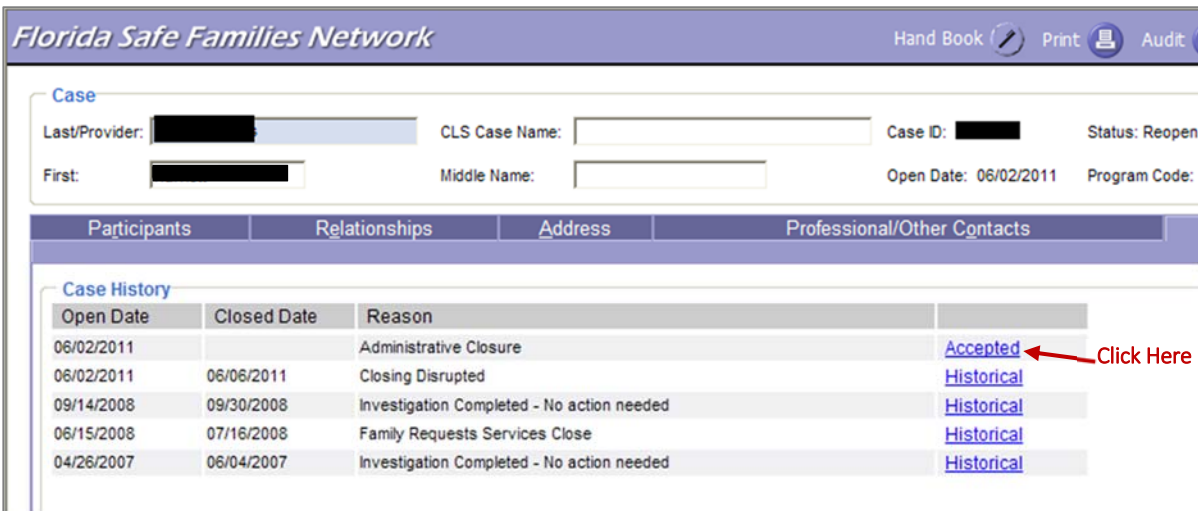
Options: [REDACTED] Go **Click Close** Save Close

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 (may take up to an hour).



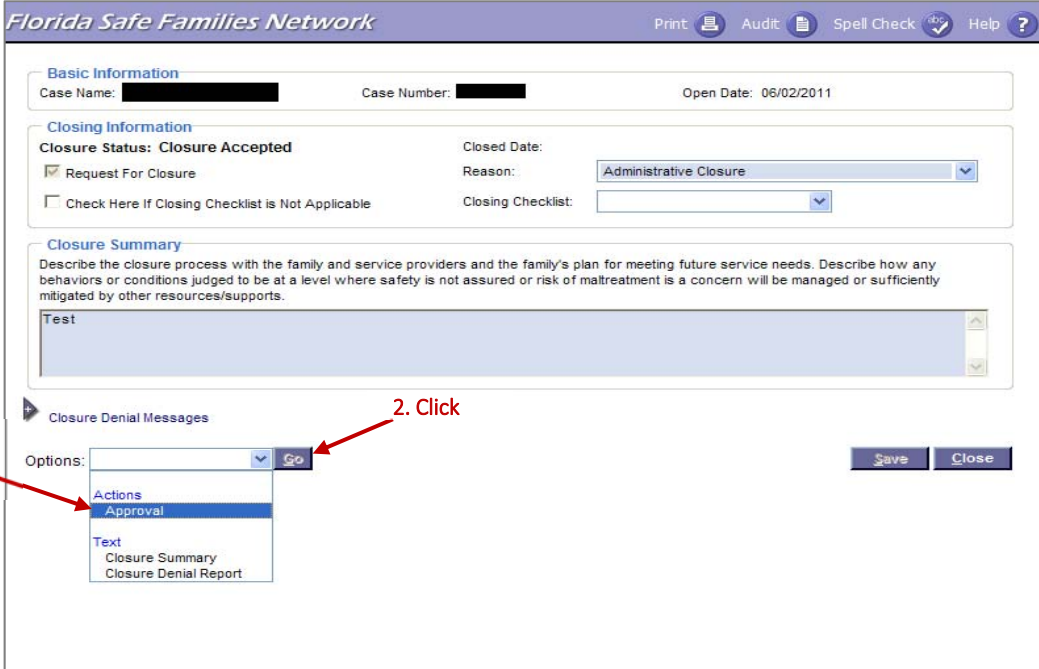
The screenshot shows the Florida Safe Families Network interface. At the top, there are navigation links: Hand Book, Print, Audit, Spell Check, and Source. Below this is a 'Case' information section with fields for Last/Provider, First, Middle Name, CLS Case Name, Case ID, Status (Reopen), Open Date (06/02/2011), and Program Code (Child). Below the case info are tabs for Participants, Relationships, Address, Professional/Other Contacts, and Closing History. The 'Case History' table is visible, with columns for Open Date, Closed Date, Reason, and a status column. The first row shows an Open Date of 06/02/2011, Reason of 'Administrative Closure', and a status of 'Pending' (circled in red). Below the Case History is a 'Merged Cases' section with columns for Open Date, Merged Date, Former Case Number, and Reason. At the bottom, there are 'Options' and 'Go' buttons, and 'Save' and 'Close' buttons.

Once the hyperlink shows Accepted, click the *Accepted* hyperlink.



The screenshot shows the Florida Safe Families Network interface, similar to the previous one. The 'Case History' table now has five rows. The first row shows an Open Date of 06/02/2011, Reason of 'Administrative Closure', and a status of 'Accepted' (indicated by a red arrow pointing to it with the text 'Click Here'). The other rows show 'Historical' status. The 'Merged Cases' section is empty. The 'Options' and 'Go' buttons are still present at the bottom.

From the *Options* drop down box select *Approval* and click *Go*.



Florida Safe Families Network

Print Audit Spell Check Help

Basic Information
Case Name: [REDACTED] Case Number: [REDACTED] Open Date: 06/02/2011

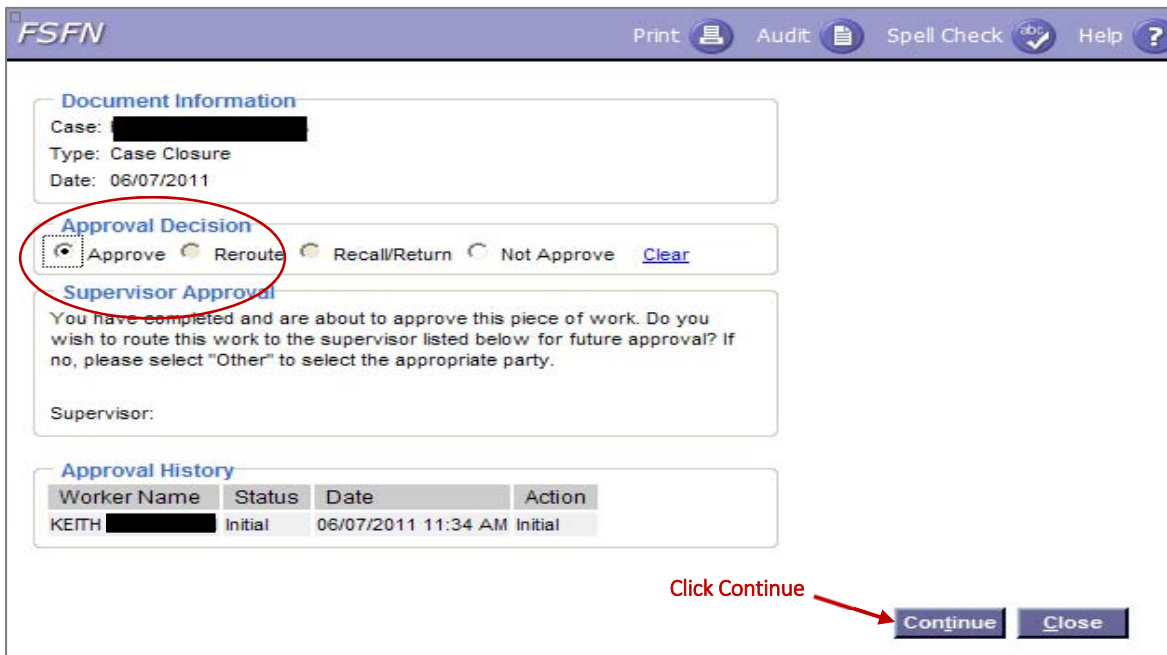
Closing Information
Closure Status: Closure Accepted
Request For Closure: Closed Date: [REDACTED]
Reason: Administrative Closure
Check Here If Closing Checklist is Not Applicable: Closing Checklist: [REDACTED]

Closure Summary
Describe the closure process with the family and service providers and the family's plan for meeting future service needs. Describe how any behaviors or conditions judged to be at a level where safety is not assured or risk of maltreatment is a concern will be managed or sufficiently mitigated by other resources/supports.
Text: [REDACTED]

Closure Denial Messages
Options: [REDACTED] **Go** Save Close

1. Select Approval
2. Click

Under *Approval Decision* group select the *Approve* radio button and click *Continue*.



FSFN

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Document Information
Case: [REDACTED]
Type: Case Closure
Date: 06/07/2011

Approval Decision
 Approve Reroute Recall/Return Not Approve Clear

Supervisor Approval
You have completed and are about to approve this piece of work. Do you wish to route this work to the supervisor listed below for future approval? If no, please select "Other" to select the appropriate party.
Supervisor: [REDACTED]

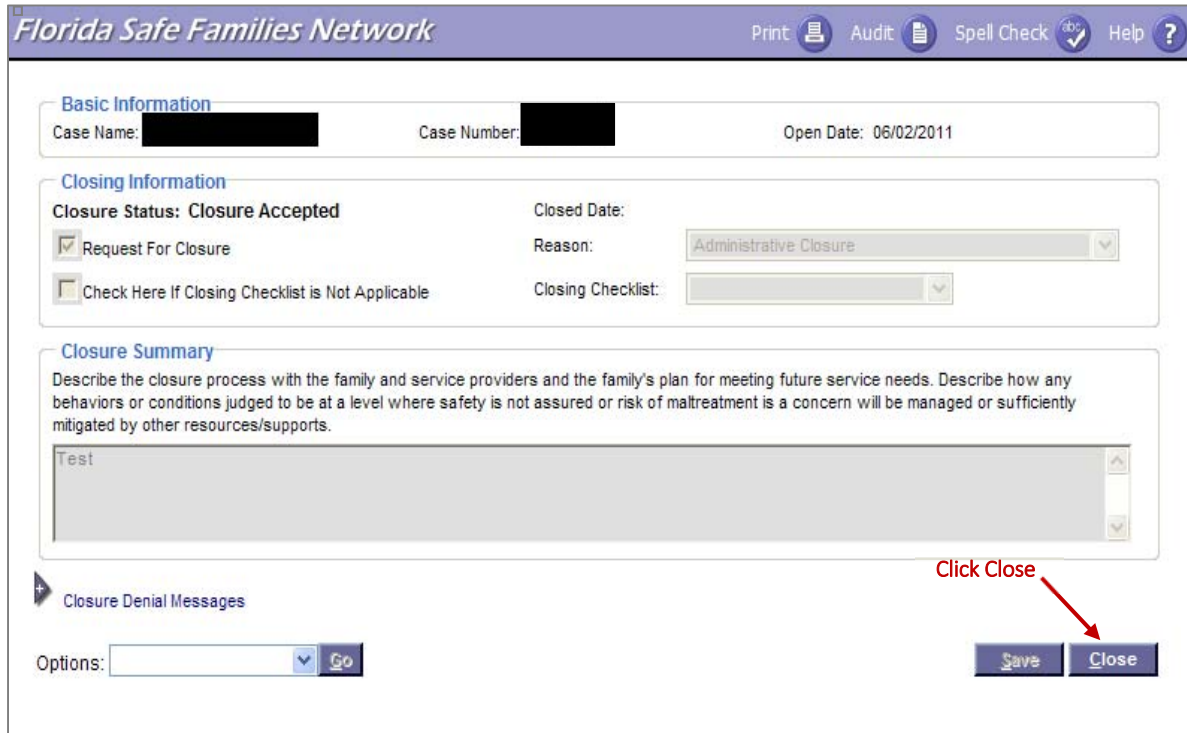
Approval History

Worker Name	Status	Date	Action
KEITH [REDACTED]	Initial	06/07/2011 11:34 AM	Initial

Click Continue

Continue Close

This will return you to the *Case Closure* screen. The *Closure Status* will say *Closure Accepted*, click *Close*.



Florida Safe Families Network Print Audit Spell Check Help

Basic Information
Case Name: [REDACTED] Case Number: [REDACTED] Open Date: 06/02/2011

Closing Information
Closure Status: **Closure Accepted** Closed Date:
 Request For Closure Reason: Administrative Closure
 Check Here If Closing Checklist is Not Applicable Closing Checklist:

Closure Summary
Describe the closure process with the family and service providers and the family's plan for meeting future service needs. Describe how any behaviors or conditions judged to be at a level where safety is not assured or risk of maltreatment is a concern will be managed or sufficiently mitigated by other resources/supports.
Test

Closure Denial Messages

Options: [Dropdown] Go

Save Close

Click Close



Recommended Action(s):

A written response is due by _____. Please document response on this form and submit to the Quality Assurance Manager identified below.

Submitted by: _____
Quality Assurance Reviewer Date

Agency: _____

Reviewed by: _____
Quality Assurance Reviewer Date

Agency: _____