

CM03: Checklist

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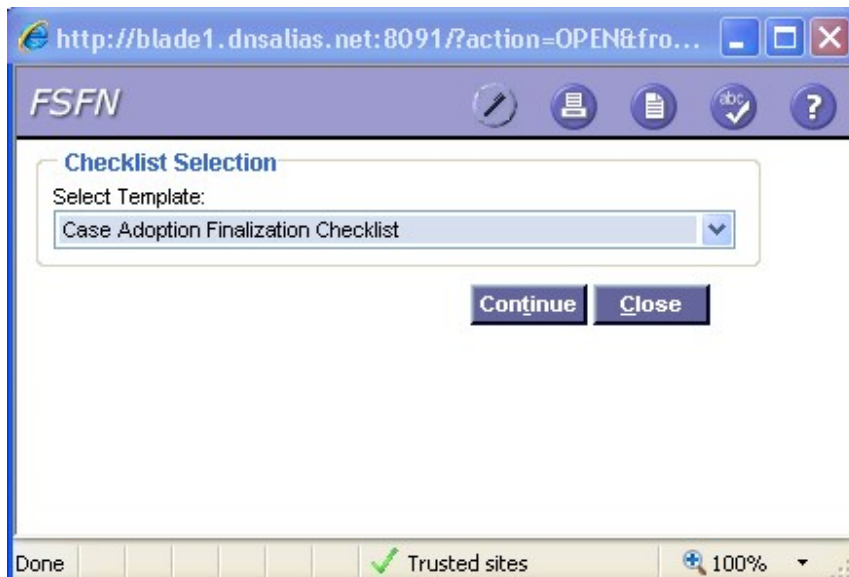
1.1 Introduction

Checklists organize items and keep track of information associated with those items. A checklist may represent steps in a process or any grouping which promotes best business practices. For example, a checklist representing steps in a process is the Case Ongoing Case Closing Checklist. This checklist guides the worker through the Case Closure procedures.

Each Unit Supervisor is responsible for creating and maintaining checklists. Upon logging into the system, Florida Safe Families Network (FSFN) checks the Unit for the worker logging in, and allows users access to their Units checklists. Units are able to make each checklist correspond to the workflow specific to their child welfare practices.

1.2. Pages

1.2.1. Page - Select Checklist Template



1.2.1.1 Page Navigation and Overview

The Select Checklist Template page is accessed from the Maintain > Checklist Template menu item in FSFN.

The checklist items are pre-defined by authorized users. Each checklist listed in the dropdown has a template, which determines the format for the items, as well as information that pertains to the entire checklist (title, who or what the checklist is for, the category and type of the checklist). All templates may be modified through the Checklist Template page, which is accessed by clicking the Continue button. Each Unit can access, and make changes, to checklists that are designated to their Unit.



1.2.1.2 Page Information

Group Box	Checklist Selection	
Fields	Select Template	Type of template chosen; user selected drop down list.
Buttons	Continue	Launches the Checklist Template page with the selected checklist.
	Close	Closes the Select Checklist Template page.

1.2.1.3 Background Processing

- The values for the following fields are dependent upon the value chosen in the Select Template drop down list box:
 - Title
 - Item rows (Number, Item, Due Date, Days)

1.2.1.4 Save Processing

- None

1.2.1.5 CRUD Matrix

Table Name	Create	Read	Update	Delete
CHCKLST_TMPL		X		



1.2.2 Page - Checklist Template

Florida Safe Families Network

Hand Book | Print | Audit | Spell Check | Help

Title: Due Date Allowed ?

Checklist Items

Number	Item	Due Date	Days	
10	SAO Form	<input type="checkbox"/>	<input type="text" value="1"/>	Delete
20	TANF	<input type="checkbox"/>	<input type="text" value="1"/>	Delete
30	Releases Signed	<input type="checkbox"/>	<input type="text" value="1"/>	Delete
40	Notifications	<input type="checkbox"/>	<input type="text" value="1"/>	Delete
50	ICWA	<input type="checkbox"/>	<input type="text" value="1"/>	Delete
60	Initial Assessment	<input type="checkbox"/>	<input type="text" value="1"/>	Delete
70	Notes	<input type="checkbox"/>	<input type="text" value="1"/>	Delete
80	Disposition	<input type="checkbox"/>	<input type="text" value="1"/>	Delete
90	Criminal Checks Done	<input type="checkbox"/>	<input type="text" value="1"/>	Delete
100	Priors Reviewed	<input type="checkbox"/>	<input type="text" value="1"/>	Delete
110	Reporter Notified	<input type="checkbox"/>	<input type="text" value="1"/>	Delete
120	High Risk Form	<input type="checkbox"/>	<input type="text" value="1"/>	Delete
130	Pool Safety Form	<input type="checkbox"/>	<input type="text" value="1"/>	Delete

1.2.2.1 Page Navigation and Overview

To access the Checklist Template page, the user will select the appropriate checklist from the Select Checklist Template page drop-down and click the Continue button.

The Checklist Template page allows the user to maintain an existing template for the Unit. The user chooses whether due dates will be allowed by clicking the Due Date box. The user enters all numbers, items and due dates (if necessary). To add an item to a template, the user clicks the Insert button to create a new row. Items are numbered in increments of 10 (e.g., 10, 20, 30...) so that new items can be added between any two existing items. The user then scrolls to the last item appearing on the checklist, enters a number where the new item should be added (e.g., 11 will place the item between 10 and 20) and enters all necessary information. The same process is used to reorder items or to modify a checklist. A Delete hyperlink is found at the end of each row to allow the user to remove the row.



The items in a checklist may be time-sensitive. For example, through the Checklist Template the authorized user defines whether due dates are allowed or not for this checklist by checking or not checking the Due Date Allowed box in the header. If this box is not checked, the Due Date column is not enabled in the Checklist page. If the box is checked, the Due Date check box field on the line is enabled, which indicates whether or not there is a due date associated with individual items on the checklist. When checked, the Days field is enabled, and the user can specify the number of calendar days after the checklist has been created that the item is due. That Due Date then appears on the Checklist page.



1.2.2.2 Page Information

Fields	Title	The selected Template title displays; this field is automatically filled with the name of the template selected.
	Due Date Allowed	Flag indicating whether due date is required; user selected check box.
Group Box	Checklist Items	
Fields	Number	Checklist item number of the associated checklist; user entered or retrieved from the Checklist Item Template table.
	Item	Checklist item of the associated checklist; user entered or retrieved from the Checklist Item Template table.
	Due Date	Indicator that due date is allowed with the checklist item; user entered or retrieved from the Checklist Item Template table.
	Days	Lag days associated with checklist item; user entered or retrieved from the Checklist Item Template table. Is disabled if the Due Date box is not checked (flag = "N").
Links	Delete	Hyperlink allows a user to delete a row in the checklist.
Buttons	Insert	Creates a new row in the checklist.
	Save	Saves all changes made to the template.
	Close	Closes the page and returns the user back to the desktop. (If changes are made, a message is launched asking user to save changes before closing).



1.2.2.3 Background Processing

- Clicking the Insert button adds a new row at the end of the checklist. The Number field is pre-filled to be 10 digits higher than the largest value in the checklist.
- When the Delete hyperlink is selected, the row is deleted after answering “Yes” to the prompt: ”Are you sure you want to delete this entry?”
- Selecting the “Due Date Allowed?” checkbox enables the “Due Date” checkboxes and “Days” field.
- Deselecting the “Due Date Allowed?” checkbox disables the “Due Date” checkboxes and “Days” field.
- The values for the following fields are dependant upon the value chosen in the Select Template drop down list box:
 - Title
 - Item rows (Number, Item, Due Date, Days)
- When updates are made to the Checklist Template, the changes are made on the Checklist Template table.

1.2.2.4 Save Processing

- Save Processing is initiated by clicking on the Save command button. Save processing is also initiated when selecting the Close button, and then answering “Yes” when the system asks the user if they would like to “Save changes before closing the page.”
- Updates made to the Checklist Template page are saved to the CHCKLST_ITEM_TMPL table.



1.2.2.5 CRUD Matrix

Table Name	Create	Read	Update	Delete
CHCKLST__TMPL		X		
CHCKLST_ITEM_TMPL		X		
CHECKLIST	X	X	X	X
CHECKLIST_ITEM	X	X	X	X
CATEGORY_TYPE		X		



1.2.3 Page - Checklist

Person Provider Inquiry Checklist -- Web Page Dialog

Florida Safe Families Network

For: Swenson, Tony Provider Organization: 130000165

Checklist Complete?

Item:	Date Due:	Date Completed:	Updated By:
<input type="checkbox"/> Child Abuse Neglect Check FSN Search			
<input type="checkbox"/> Community Programs			
<input type="checkbox"/> Economic Support/W2			
<input type="checkbox"/> Fact Sheet Received			
<input type="checkbox"/> Fact Sheet Sent			
<input type="checkbox"/> Foster Family Orientation Session			
<input type="checkbox"/> Information Packet Sent			
<input type="checkbox"/> Juvenile Justice Check			
<input type="checkbox"/> Parental Interest Survey			
<input type="checkbox"/> Pre-Application			
<input type="checkbox"/> Preliminary Criminal Background Check			
<input type="checkbox"/> Public Health			

[Save](#) [Close](#)

1.2.3.1 Page Navigation and Overview

Checklists are accessed from a related business process page from the Options drop-down field. For example, when the worker initiates case closure, the appropriate checklist is accessed by selecting the template in the Options drop-down field and clicking the Go button. When a checklist is displayed, the user views the checklist items and any associated information that has been entered.

The checklist function is a separate entity from the tickler function in that checklist due dates have no effect on tickler deletion. Likewise, a due date on a checklist item does not create a tickler.



Checklists serve to remind workers of the appropriate steps but do not force the worker to complete each step. The checklist data consist of the status of the item, an optional date that the item is due, and the date the item is marked complete and by whom. When a checklist is updated, the system captures the identification of the person performing the update and the date and time of the update. The "checking off" of a particular item must be manually done and a check will be displayed in the box when it has been checked. While the worker is in the Checklist page, it is possible to select and deselect any check boxes. However, once the worker exits the page, a previously selected check box may not be deselected. All actions are viewed and performed on the Checklist page.



1.2.3.2 Page Information

Group Box	None	
Fields	For	The category, Case name, Case ID; retrieved from Checklist Template table based on the items that have been uniquely identified.
	Provider Organization	
	Checklist Complete?	Flag indicating whether checklist is complete; retrieved from the Checklist table based upon item completion status when all items "completion status" boxes are checked.
Group Box	None	
Fields	Not Labeled	Check box for item completion status.
	Item	Item name; retrieved from the Checklist Item table.
	Due Date	The date by which action must be taken; if due date has been specified in the checklist template this field will be calculated and automatically filled.
	Date Completed	The date upon which the action was completed; if item completion status is checked, field will be set to the system date.
	Updated By	The worker ID of specific worker who has logged in and checked item; pre-filled only when item completion status is checked.
Buttons	Save	Standard Save processing
	Close	Standard Close processing. (If changes have been made, a message is launched asking user to save changes before closing).



1.2.3.3 Background Processing

- To retrieve an existing checklist, the system uses the id_chckl passed from the page that calls the checklist processing. The id_chckl value is used to retrieve the data stored in the CHCKLST and CHCKLST_ITEM tables. If no id_chckl exists, the system creates a new checklist as defined in the CHCKLST_TMPL and CHCKLST_ITEM_TMPL tables. The id_chckl_tmpl is also passed by the page calling the checklist processing.
- The flag indicating whether the checklist has been completed; is retrieved from the Checklist table based upon item completion status when all items' completion status boxes are checked.
- The due date field will only appear when the due date field on the Checklist Template table indicates "Yes". The due date is calculated as the system date plus the lag days set in the Checklist Item Template table. The due date field and label will not appear on the page if a due date is not checked on the Checklist Template.
- Upon selecting a box and exiting from the checklist page, the worker's name, the time and the "checked box" will remain permanently.
- Upon clicking Save, the changes made to the Checklist Template will update the Checklist Template or Checklist Table.

1.2.3.4 Save Processing

- Save Processing is initiated by clicking on the Save command button. Save processing is also initiated when selecting the Close button, and then answering „Yes“ when the system asks the user if they would like to „Save changes before closing the page.“
- Updates made to the Checklist page are saved to the CHCKLST and CHCKLST_ITEM tables when the worker clicks on the Save button.

1.2.3.5 CRUD Matrix

Table Name	Create	Read	Update	Delete
CHCKLST	X	X	X	
CHCKLST_ITEM	X	X	X	
PERSON		X		
CHCKLST_ITEM_TMPL		X		



1.3. Inventories

1.3.1 Table Description

Table Name	Description
CATEGORY_TYPE	This table contains categories and types for manual events, ticklers, and checklists.
CHCKLST_ITEM_TMPL	This table defines the items present in the various FSFN CHECKLISTS including the CHECKLIST item text and category, type, and number codes. Processes of CM03 (Checklist) create and maintain this data.
CHECKLIST	The CHECKLIST table contains header information for all checklists created in FSFN. Processes of CM03 (Checklists) create and maintain this data.
CHECKLIST_ITEM	The CHECKLIST ITEM table contains information for a specific checklist created for a specific CASE. Processes of CM03 (Checklist) create and maintain this data.
CHECKLIST_TMPL	The CHECKLIST TMPL table maintains common information about the checklist of a specific category and type. Processes of CM03 (Checklists) use this data.
PERSON	This PERSON table maintains information that identifies a known individual known in the FSFN system such as name, date of birth, social security number, race, sex, etc. A PERSON can be a WORKER, REPORT PART, REFERRAL PART, CASE PARTICIPANT or PROVIDER PARTICIPANT. Primary search processing is centered around this data. Processes of CM01 (Person Management) build and maintain this information.



1.3.2 Reference Data

1.3.2.1 Drop Downs

FSFN Page: Select Checklist Template

Tab Name: N/A

Field Name: Select Template Tx Ctgry & TX Ctgry Type (Drop Down Box)

Table Name: Checklist_Tmpl

Group Id: Checklist Selection

SELECT_TEMPLATE
Case Adoption Finalization Checklist
Case Ongoing Case Closing Checklist
Investigation Closure Checklist
Provider Licensing/Re-licensing Checklist

1.3.3 Automated Messages

None

1.3.4 Checklists

None

1.3.5 Ticklers

None

1.3.6 Notifications

None



1.3.7 Text Templates

None **1.3.8.**

Reports

All reports' designs are documented in the RP01 Reports Topic Paper. Please refer to the CM03 section of that topic paper for information on the reports (if any) related to this topic. Please note that not all topics have associated reports.

1.3.9 Triggers

None

1.3.10 Batch Programs

None

1.4. Requirements Covered in This Paper

None