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How Do I...?	Selections	Tips & Guidelines
<p>Create a <b>Family Support</b> and Document Risk Factors (Users with an Assignment to the case)</p>	<ul style="list-style-type: none"> <li>▪ From the <b>Desktop</b> select <b>Create &gt; Case Work &gt; Placement &gt; Family Support</b></li> <li>▪ Select a <b>Case</b></li> <li>▪ Select a <b>Case Participant</b></li> <li>▪ Click the <b>Create</b> button.</li> <li>▪ In the <b>Family Support</b> Child group box, the user may select to choose a <b>Family Support Type</b>.</li> <li>▪ In the <b>Family Support Status Begin</b> group box, enter a <b>date</b>.</li> <li>▪ Select a value from the <b>Referral Type</b> list.</li> <li>▪ Select an <b>Intake Number</b> from the list.</li> <li>▪ Select the <b>Primary Caregiver</b> from the list.</li> <li>▪ If applicable, select a <b>Secondary Caregiver</b>.</li> <li>▪ In the <b>Status Begin Comments</b> field, enter text.</li> <li>▪ In the <b>Risk Factor. Summary</b> group box, click <b>Insert</b> to launch the <b>Risk Factors</b> pop up page.</li> <li>▪ On the <b>Risk Factors</b> pop up page, in the <b>Assessment Information</b> group box, select the <b>Type</b>.</li> <li>▪ Enter the <b>Assessment Date</b>.</li> <li>▪ Select the <b>Risk Level</b>.</li> <li>▪ In the <b>Factors Contributing to Risk Level</b>, select the appropriate check boxes.</li> <li>▪ Click the <b>Continue Button</b> to return to the <b>Family Support</b> page.</li> <li>▪ , On the <b>Family Support</b> page, select <b>Save</b> and <b>Close</b></li> </ul>	<p><i>The Family Support page allows users to document an assessment of a child's "risk" of maltreatment and allows a Case to be opened and remain open for the purpose of Family Support</i></p> <p><i>A Date, a Referral Type, an Intake number, a Primary Caregiver and comments are all required to save the page</i></p> <p><i>Selecting the Family Support Type is optional.</i></p> <p><i>On the Risk Assessment page, an assessment type and date are required as well as the selection of at least one checkbox.</i></p> <p><i>Only one "Initial" Risk Factor page can be created per Family Support page but during the Family Support process additional "Update" Risk Factor pages can be created to reflect updates to the risks based on subsequent assessments. When the Family Support is closed, a final Risk factor page with the type of "Closure" should be created to document any remaining risks (or no risks present) at the completion of the Family Support. Only one "Closure" Risk factor page can be created per Family Support page.</i></p> <p><i>Adding a Risk Factor page to the Family Support is optional.</i></p> <p><i>When the Risk Factor pop up page is saved a summary of the assessment will display on the Family Support page with hyperlinks to "View" or "Edit."</i></p> <p><i>The Assessment Date entered cannot precede the most recent Assessment Date, nor can it precede the Family Support Status Begin Date.</i></p> <p><i>Select details of the Risk Factor page will display in the Risk Factor Summary group box. The Risk Factor Summary group box is sorted oldest to newest, top to bottom, based on the Assessment Date. The hyperlinks for "Edit" and "Delete" are available.</i></p>
<p>Edit or Delete an existing <b>Family Support</b> and/or Risk Factors page.</p>	<ul style="list-style-type: none"> <li>▪ Expand the <b>Cases</b> expando on the <b>Desktop</b></li> <li>▪ Click the <b>Case</b> icon for the case with the <b>Family Support</b></li> <li>▪ Click the</li> </ul>	<p><i>Saved Family Support records are stored on the desktop in the Placement/Services section of a Case and can be accessed there by those with an assignment.</i></p> <p><i>If changes need to be made based on the current</i></p>

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	<ul style="list-style-type: none"> <li>▪ <b>Placement/Services</b> icon</li> <li>▪ Select the hyperlinked <b>Family Support</b> record.</li> <li>▪ To make changes to the existing <b>Risk Factor</b> (i.e. to changes from the original assessment), Select the <b>Edit</b> hyperlink in the <b>Risk Factor Summary</b> group box and click Continue. This will open the Risk Factors editable pop up page.</li> <li>▪ Select <b>Continue</b> to return to the <b>Family Support</b> page</li> <li>▪ Click <b>Close</b> to return to the <b>Desktop</b>.</li> </ul>	<p><i>assessment, the edit hyperlink will allow those changes.</i></p> <p><i>Since the Family Support page is designed to reflect the process of managing assessed risks, a new Risk Factor page with the type of "Update". should be created for any new assessment</i></p>
<p>Update an existing <b>Family Support</b> page and/or the associated Risk Factors page</p>	<ul style="list-style-type: none"> <li>▪ On the <b>Desktop</b> expand the <b>Cases</b> expando.</li> <li>▪ Click the <b>Case</b> icon for the case with the <b>Family Support</b>.</li> <li>▪ Click the <b>Placement/Services</b> icon</li> <li>▪ Select the hyperlinked <b>Family Support</b> record.</li> <li>▪ To update the risk factors based on a new Insert button to launch a new Risk Factors pop up page.</li> <li>▪ On the <b>Risk Factor</b> pop up page, in the <b>Assessment Information</b> group box, in the <b>Type</b> field select <b>Update</b> from the list.</li> <li>▪ On the <b>Risk Factor</b> pop up page, enter a date in the <b>Assessment Date</b> field.</li> <li>▪ In the <b>Factors Contributing to Risk Level</b> group box, select check boxes for the updated values.</li> <li>▪ Select <b>Continue</b> to return to the Family Support page.</li> <li>▪ On the Family Support page, select Close to return to the desktop.</li> </ul>	<p><i>Saved Family Support records are stored on the desktop in the Placement/Services section of a Case and can be accessed there. Persons assigned to the case can edit them there.</i></p>
<p>Complete (finalize)an</p>	<ul style="list-style-type: none"> <li>▪ On the <b>Desktop</b>, select the appropriate <b>Case</b> icon to</li> </ul>	

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<p>existing <b>Family Support</b> page and/or the associated Risk Factors page</p>	<ul style="list-style-type: none"> <li>expand the <b>Case</b>.</li> <li>▪ From the <b>Case</b> icons, expand the <b>Placement/Services</b> icon.</li> <li>▪ Click on the <b>Family Support</b> hyperlink for the child's Family Support record.</li> <li>▪ In the <b>Family Support Status End</b> group box, enter a date in the <b>End Date</b> field.</li> <li>▪ In the <b>Ending Reason</b> field. Select a reason.</li> <li>▪ In the <b>Status Ending Comments</b> text box, enter text.</li> <li>▪ In the <b>Risk Factor Summary</b> group box, select the <b>Insert</b> button to launch the <b>Risk Factor</b> pop up page.</li> <li>▪ From the <b>Risk Factor</b> pop up page, in the <b>Assessment Information</b> group box, select <b>Closure</b> from the list.</li> <li>▪ In the <b>Assessment Information</b> group box, enter the <b>Assessment Date</b>.</li> <li>▪ In the <b>Factors Contributing to Risk Level</b>, review any checked items.</li> <li>▪ Select <b>Continue</b> to return to the <b>Family Support</b> page.</li> <li>▪ To finalize the ending of the <b>Family Support</b>; in the <b>Child</b> group box, <b>select</b> the <b>Completed</b> check box.</li> <li>▪ Select <b>Save</b>.</li> <li>▪ In the Dialog Box regarding the freezing of the <b>Family Support</b> page, click <b>Yes</b> to continue or <b>No</b> to return to the <b>Family Support</b> page.</li> </ul>	<p><i>If the reason selected is "New Investigation Received", the Intake Number field becomes enabled and is required.</i></p> <p><i>When the type selected is Closure, the selection of a Factor is not required.</i></p> <p><i>If Risk Level still exists upon "Completing" the Family Support record, the current Risk Level will display on the outliner.</i></p> <p><i>If "Yes" is answered to the Dialog box, the record will become frozen and no longer editable. The historical Risk Factor pages can be viewed by selecting the "View" hyperlink. If answered no, the user is returned to the Family Support page and the record remains editable.</i></p>
<p>Create a <b>Family Support</b> record and document</p>	<ul style="list-style-type: none"> <li>▪ From the <b>Desktop</b>, click the <b>Financial Work</b> button in the <b>Banner</b>.</li> </ul>	<p><i>A Date, a Referral Type, an Intake number, a Primary Caregiver and comments are all required to save the page.</i></p>

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<p>the Initial Risk Factor information (users who DO NOT have an assignment to the case)</p>	<ul style="list-style-type: none"> <li>▪ From the Create <b>Financial Items</b> group box, <b>Placement/Services</b> category, select <b>Create Family Support</b>.</li> <li>▪ From the new <b>Family Support</b> page, in the <b>Child</b> group box, select the <b>Search</b> hyperlink to launch a <b>Person Search</b> page.</li> <li>▪ In the <b>Search Criteria</b> group box of the <b>Search</b> page, enter the <b>Last Name</b> and any other known demographic information to aid in the search.</li> <li>▪ Click the <b>Search</b> button.</li> <li>▪ From the <b>Persons Returned</b> group box, select a <b>Participant</b> icon.</li> <li>▪ From the expanded person record, click the <b>Case</b> icon to display all cases associated with the found person.</li> <li>▪ Select the radio button for the appropriate <b>Case</b>.</li> <li>▪ Select <b>Continue</b> to return to the <b>Family Support</b> page.</li> <li>▪ In the <b>Family Support</b> Child group box, the user may select to choose a <b>Family Support Type</b>.</li> <li>▪ On the <b>Family Support</b> page In the <b>Family Support Status Begin</b> group box, enter a <b>date</b>.</li> <li>▪ Select a value from the <b>Referral Type</b> list.</li> <li>▪ Select an <b>Intake Number</b> from the list.</li> <li>▪ Select the <b>Primary Caregiver</b> from the list.</li> <li>▪ If applicable, select a <b>Secondary Caregiver</b>.</li> <li>▪ In the <b>Status Begin Comments</b> field, enter text.</li> <li>▪ In the <b>Risk Factor Summary</b> group box, click <b>Insert</b> to launch the <b>Risk</b></li> </ul>	<p><i>On the Risk Assessment page, an assessment type and date are required as well as the selection of at least one checkbox.</i></p> <p><i>Only one "Initial" Risk Factor page can be created per Family Support page but during the Family Support process additional "Update" Risk Factor pages can be created to reflect updates to the risks based on subsequent assessments. When the Family Support is closed, a final Risk factor page with the type of "Closure" should be created to document any remaining risks (or no risks present) at the completion of the Family Support. Only one "Closure" Risk factor page can be created per Family Support page</i></p> <p><i>The Assessment Date entered cannot precede the most recent Assessment Date, nor can it precede the Family Support Status Begin Date.</i></p> <p><i>Select details of the Risk Factor page will display in the Risk Factor Summary group box. The Risk Factor Summary group box is sorted oldest to newest, top to bottom, based on the Assessment Date. The hyperlinks for "Edit " and "Delete" are available</i></p> <p><i>Selecting the Family Support Type is optional.</i></p> <p><i>Adding a Risk Factor page to the Family Support is optional.</i></p>

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	<p><b>Factors</b> pop up page.</p> <ul style="list-style-type: none"> <li>▪ On the <b>Risk Factors</b> pop up page, in the <b>Assessment Information</b> group box, select the <b>Type</b>.</li> <li>▪ Enter the <b>Assessment Date</b>.</li> <li>▪ Select the <b>Risk Level</b>.</li> <li>▪ In the <b>Factors Contributing to Risk Level</b>, select the appropriate check boxes.</li> <li>▪ Click the <b>Continue Button</b> to return to the <b>Family Support</b> page.</li> <li>▪ Select <b>Save</b> and <b>Close</b>.</li> </ul>	
<p>Edit or Delete the existing <b>Family Support</b> an/or the associated Risk Factors pages</p>	<ul style="list-style-type: none"> <li>▪ From the <b>Desktop</b>, click the <b>Financial Work</b> button in the <b>Banner</b>.</li> <li>▪ From the <b>Create Financial Items</b> group box, <b>Placement/Services</b> category, select <b>Maintain Family Support</b>.</li> <li>▪ From the displayed <b>Family Support</b> page, in the <b>Child</b> group box, select the <b>Search</b> hyperlink to launch a <b>Person Search</b> page.</li> <li>▪ In the <b>Search Criteria</b> group box of the Search page, enter the <b>Last Name</b> and any other known demographic information to aid in the search.</li> <li>▪ Click the <b>Search</b> button.</li> <li>▪ From the <b>Persons Returned</b> group box, select a Participant icon.</li> <li>▪ From the expanded person record, click the <b>Case</b> icon to display all Cases associated with the found person.</li> <li>▪ Select the radio button for the appropriate <b>Case with the existing Family Support</b>.</li> <li>▪ Click the icon to expand the case.</li> <li>▪ From the case icons select</li> </ul>	<p><i>Saved Family Support records are stored on the desktop in the Placement/Services section of a Case. The record can be accessed by following the Create Financial Work steps and locating the record via a person search.</i></p> <p><i>If changes need to be made based on the current assessment, the edit hyperlink will allow those changes.</i></p> <p><i>Since the Family Support page is designed to reflect the process of managing assessed risks, a new Risk Factor page with the type of "Update". should be created for any new assessment</i></p>

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	<p>the <b>Placement/Services</b> icon.</p> <ul style="list-style-type: none"> <li>▪ Select the hyperlinked <b>Family Support</b> record.</li> <li>▪ To make changes to the existing <b>Risk Factor</b> (i.e. to correct an error form the original assessment), Select the <b>Edit</b> hyperlink in the <b>Risk Factor Summary</b> group box to open the page.</li> </ul>	
<p>Update the existing <b>Family Support</b> and/or the associated Risk Factors pages</p>	<ul style="list-style-type: none"> <li>▪ From the <b>Desktop</b>, click the <b>Financial Work</b> button in the <b>Banner</b>.</li> <li>▪ From the <b>Create Financial Items</b> group box, <b>Placement/Services</b> category, select <b>Maintain Family Support</b>.</li> <li>▪ From the new <b>Family Support</b> page, in the <b>Child</b> group box, select the <b>Search</b> hyperlink to launch a <b>Person Search</b> page.</li> <li>▪ In the <b>Search</b> Criteria group box of the <b>Search</b> page, enter the <b>Last Name</b> and any other known demographic information to aid in the search.</li> <li>▪ Click the <b>Search</b> button.</li> <li>▪ From the <b>Persons Returned</b> group box, select a Participant icon.</li> <li>▪ From the expanded <b>Person</b> record, click the <b>Case</b> icon to display all <b>Cases</b> associated with the found person.</li> <li>▪ Select the radio button for the appropriate <b>Case</b>.</li> <li>▪ Click to expand the <b>Case</b>.</li> <li>▪ Click the <b>Placement/Services</b> icon</li> <li>▪ Select the hyperlinked <b>Family Support</b> record to open and update the existing <b>Family Support</b> page.</li> <li>▪ in the <b>Risk Factor</b></li> </ul>	

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	<p><b>Summary</b> group box, select <b>Insert</b>.</p> <ul style="list-style-type: none"> <li>▪ On the <b>Risk Factor</b> pop up page, in the <b>Assessment Information</b> group box, in the <b>Type</b> field select <b>Update</b> from the list.</li> <li>▪ On the <b>Risk Factor</b> pop up page, enter a date in the <b>Assessment Date</b> field.</li> <li>▪ In the <b>Factors Contributing to Risk Level</b> group box, select check boxes for the updated values.</li> <li>▪ Select <b>Continue</b> to return to the <b>Family Support</b> page.</li> </ul>	
<p>Complete (finalize)an existing <b>Family Support</b> and/or the associated Risk Factors pages</p>	<ul style="list-style-type: none"> <li>▪ From the <b>Desktop</b>, click the <b>Financial Work</b> button in the <b>Banner</b>.</li> <li>▪ From the <b>Create Financial Items</b> group box, <b>Placement/Services</b> category, select <b>Maintain Family Support</b>.</li> <li>▪ From the new <b>Family Support</b> page, in the <b>Child</b> group box, select the <b>Search</b> hyperlink to launch a <b>Person Search</b> page.</li> <li>▪ In the <b>Search</b> Criteria group box of the <b>Search</b> page, enter the <b>Last Name</b> and any other known demographic information to aid in the search.</li> <li>▪ Click the <b>Search</b> button.</li> <li>▪ From the <b>Persons Returned</b> group box, select a Participant icon.</li> <li>▪ From the expanded <b>Person</b> record, click the <b>Case</b> icon to display all <b>Cases</b> associated with the found person.</li> <li>▪ Select the radio button for the appropriate <b>Case</b>.</li> <li>▪ Click to expand the <b>Case</b>.</li> <li>▪ Click the <b>Placement/Services</b> icon</li> </ul>	<p><i>If the reason selected is "New Investigation Received", the Intake Number field becomes enabled and is required.</i></p>

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	<ul style="list-style-type: none"> <li>▪ Select the hyperlinked <b>Family Support</b> record to open and update the existing <b>Family Support</b> page.</li> <li>▪ In the <b>Family Support Status End</b> group box, enter a date in the <b>End Date</b> field.</li> <li>▪ In the <b>Ending Reason</b> field. Select a reason.</li> <li>▪ In the <b>Status Ending Comments</b> text box, enter text.</li> <li>▪ In the <b>Risk Factor Summary</b> group box, select the <b>Insert</b> button to launch the <b>Risk Factor</b> pop up page.</li> <li>▪ From the <b>Risk Factor</b> pop up page, in the <b>Assessment Information</b> group box, select <b>Closure</b> from the list.</li> <li>▪ In the <b>Assessment Information</b> group box, enter the <b>Assessment Date</b>.</li> <li>▪ In the <b>Factors Contributing to Risk Level</b>, review any checked items.</li> <li>▪ Select <b>Continue</b> to return to the <b>Family Support</b> page.</li> <li>▪ To finalize the ending of the <b>Family Support</b>; in the <b>Child</b> group box, <b>select</b> the <b>Completed</b> check box.</li> <li>▪ Select <b>Save</b></li> <li>▪ In the Dialog Box regarding the freezing of the <b>Family Support</b> page, click <b>Yes</b> to continue or <b>No</b> to return to the <b>Family Support</b> page.</li> </ul>	<p><i>If "Referral Investigation Closed with Findings Other than No Indicators" is selected the Intake Number field defaults to the Intake Number selected in the <b>Family Support Status Begin</b> group box and is disabled and grayed out.</i></p> <p><i>When the type selected is Closure, the selection of a Factor is not required.</i></p> <p><i>If Risk Level still exists upon "Completing" the Family Support record, the current Risk Level will display on the outliner</i></p>