

SM07b: Forms

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Change History

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Q1 11/10/13	CR36	Moved Visitation Plan Template and Refrigerator Case Plan Summary Template from “Licensing” to “Planning”	FSFN Enhancement Team	1.3.6 Notifications/ Templates
Q3		Revised to add a new Trust Account form	FSFN Enhancement Team	1.2.3.1 Pop-up Page – Forms Copy Over 1.3.6 Notifications/Te mplates
10/23/2015		Updates resulting from Supported Platforms review	Ibrahim Allison	Throughout
11/03/2015		Supported Platforms peer review	Robert Thornton	Throughout
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1.1. Introduction

Topic SM07b: Forms provides the functionality to process and track certain forms that are frequently utilized by Department of Children and Families (DCF) /Community-Based Care (CBC)/ Sheriff’s Office workers. It is comprised of one page from which a worker is able to activate the appropriate Microsoft Word text template for the piece of case or provider work to be created. The forms page looks the same for both case and provider work, except for the first line in the General Information group box. For provider work, it will read “Provider”, and for case work, it will read “Case.”

In order to utilize the Forms page, the user accesses the Create Case Work (or Create Provider Work, as appropriate) page and selects which template or notification to launch under the Forms dropdown. Next, the worker selects the case and case participant to be associated with the form. After a form has been created, it is filed on the Outliner under the Forms icon for the appropriate case.

For a complete listing of which documents can be produced from the Forms page, see the Notifications and Templates sections (1.3.6. and 1.3.7. respectively).



1.2. Pages

1.2.1. Page – Forms (with Approval Function)

Screenshot #1 – Non-FSDMM Security User Group

The screenshot shows the FSFN application interface. At the top, there is a purple header bar with the FSFN logo on the left and navigation icons for Hand Book, Print, Audit, Spell Check, and Help on the right. Below the header, the main content area is titled 'General Information' and contains the following fields:

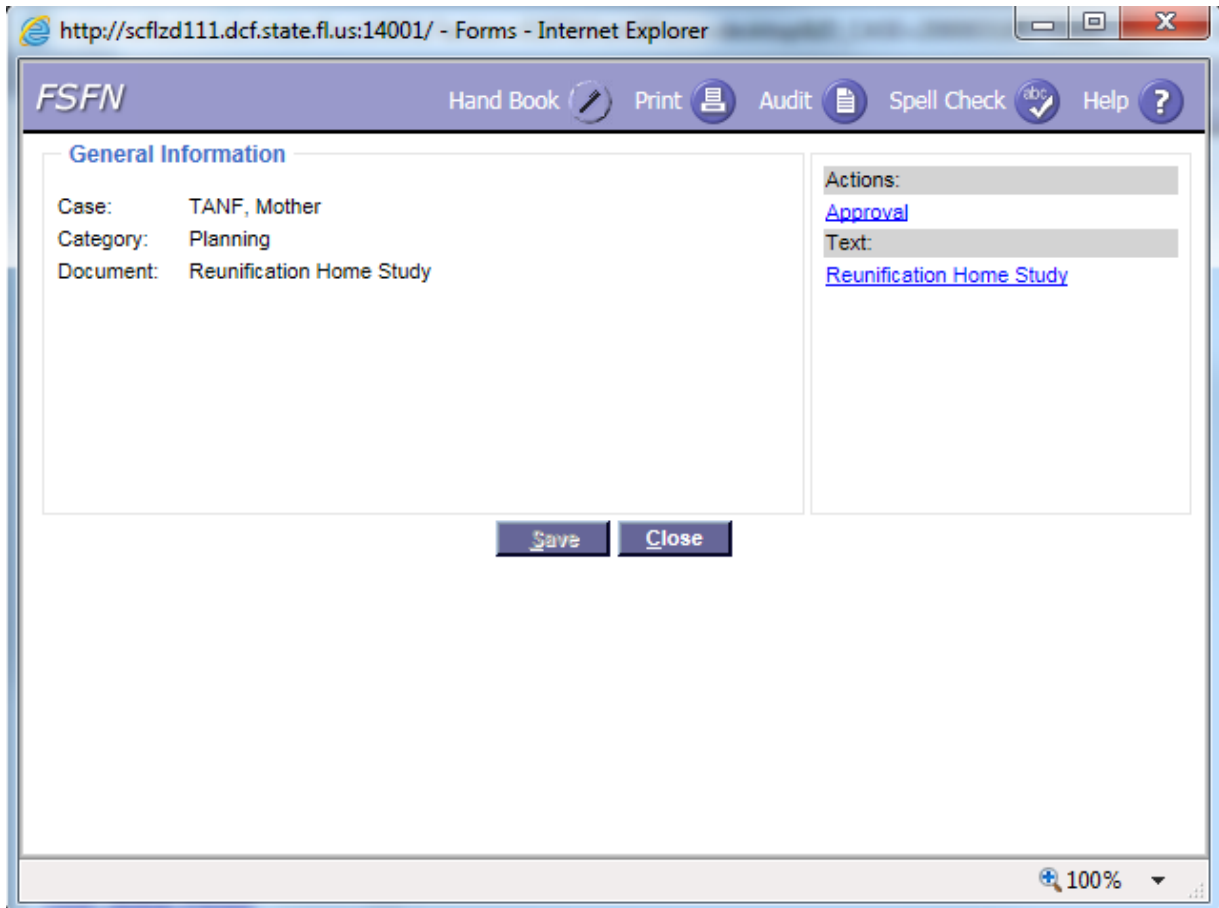
- Case: Sbmvh, Alicia
- Category: Planning
- Document: Reunification Home Study

Below these fields, there is an 'Options:' label followed by a dropdown menu. The dropdown menu is open, showing the following options:

- Actions
- Approval
- Text
- Reunification Home Study

To the right of the dropdown menu is a 'Go' button. Further to the right are 'Save' and 'Close' buttons.

Screenshot #2 – FSDMM Security User Group



1.2.1.1. Page Overview

Navigation

The Forms page is accessed either by the Case Work icon in the Banner Bar or through the Create menu item on the desktop. Forms page can be accessed from the “Forms” and “Tx Planning” dropdowns on the Create Case Work page. The worker selects the appropriate document from the Create Case Items group box under the Forms dropdown. The worker will then select the Case and Case participants and click the Create button to launch the Forms page. If no case participant(s) need to be associated with the form the Case Participant group box will be disabled.

On the Forms page, the Case (or Provider), Category, and Document name is displayed. The worker selects the Text option from the Options dropdown and clicks on the Go button. The appropriate document will be launched in Microsoft Word. Once the document is launched, the



user may update any narrative information before printing the document with the pre-filled fields.

Page Summary

The Forms page assists in the creation of commonly used documents by pre-filling fields where possible, and provides a system link to the documents that need to be produced in the process of providing services.

When the Forms page is launched, the name of the case, or provider, and the subject specified on the Create Case Work page pre-fill the Case (or Provider) and the Category fields, respectively. The Document name, to be created, pre-fills in the Document field.

After the worker populates the page with the appropriate information, they may select the Approval option (if available) from the Options dropdown to seek supervisory approval for the document. Once supervisory approval has been granted no further modifications to the information on the Forms page or in the associated document may be made.

The Approval Option is only available for the following Document Types: Reunification Home Study; Refrigerator Case Plan Summary – Mother; and Refrigerator Case Plan Summary – Father. In addition, based on the user’s Security User Group the page will either contain the Options drop down or the Actions panel, as reflected in the screenshots above, but the functionality is the same.

1.2.1.2. Page Information

Group Box:	General Information	
Fields:	Case (or Provider)	Case (or Provider) for which the document is being created; system derived from the information specified in the Case (or Providers) group box on the Create Case Work (or Create Provider Work) page; not user modifiable.
	Category	Category of the document that is being created; system derived from the information specified in the Create Case Items (or Create Provider Items) group box on the Create Case Work page; not user modifiable.
	Document	Name of the document that is being created; system derived from the information specified in the dropdown in the Create Case Items (or Create Provider



		Items) group box on the Create Case Work page; not user modifiable.
Options	Actions	Contains the Approval option (on some forms pages) and allows the worker to begin the standard FSFN approval process.
	Text	Contains the name of the document identified in the Document field. This allows the worker to access the document through Microsoft Word.
Buttons	Go	Accesses the document (as specified in the Document field and chosen from the Options dropdown) in Microsoft Word.
	Save	Standard Save processing
	Close	Standard Close processing

1.2.1.3. Background Processing:

- Once supervisory approval has been granted, the information specified on the page and in the associated document is frozen (i.e. no further modifications may be made).
- Approval Option is only available for the following Document Types:
 - Reunification Home Study
 - Note: This Document Type will no longer be available for creation following R2 once the user is “phased”. Therefore, the Approval option will only be available for users who are not “phased” when creating new Reunification Home Study templates and for users who are “phased” when approving existing, pending Reunification Home Study templates.
 - Refrigerator Case Plan Summary – Mother
 - Refrigerator Case Plan Summary - Father

1.2.1.4. Save Processing – Forms

- Save processing is initiated by clicking on the Save 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.” When a form is created and saved, the information specified on this page is saved to the Assessment table.



1.2.1.5. CRUD Matrix

Table Name	Create	Read	Update	Delete
ASSESSMENT	X	X	X	
DOCUMENT_TEXT	X	X	X	
DOCUMENT_MGMT	X	X		



1.2.2. Page – Forms (without Approval Function)

Screenshot #1 – Non-FSDMM Security User Group

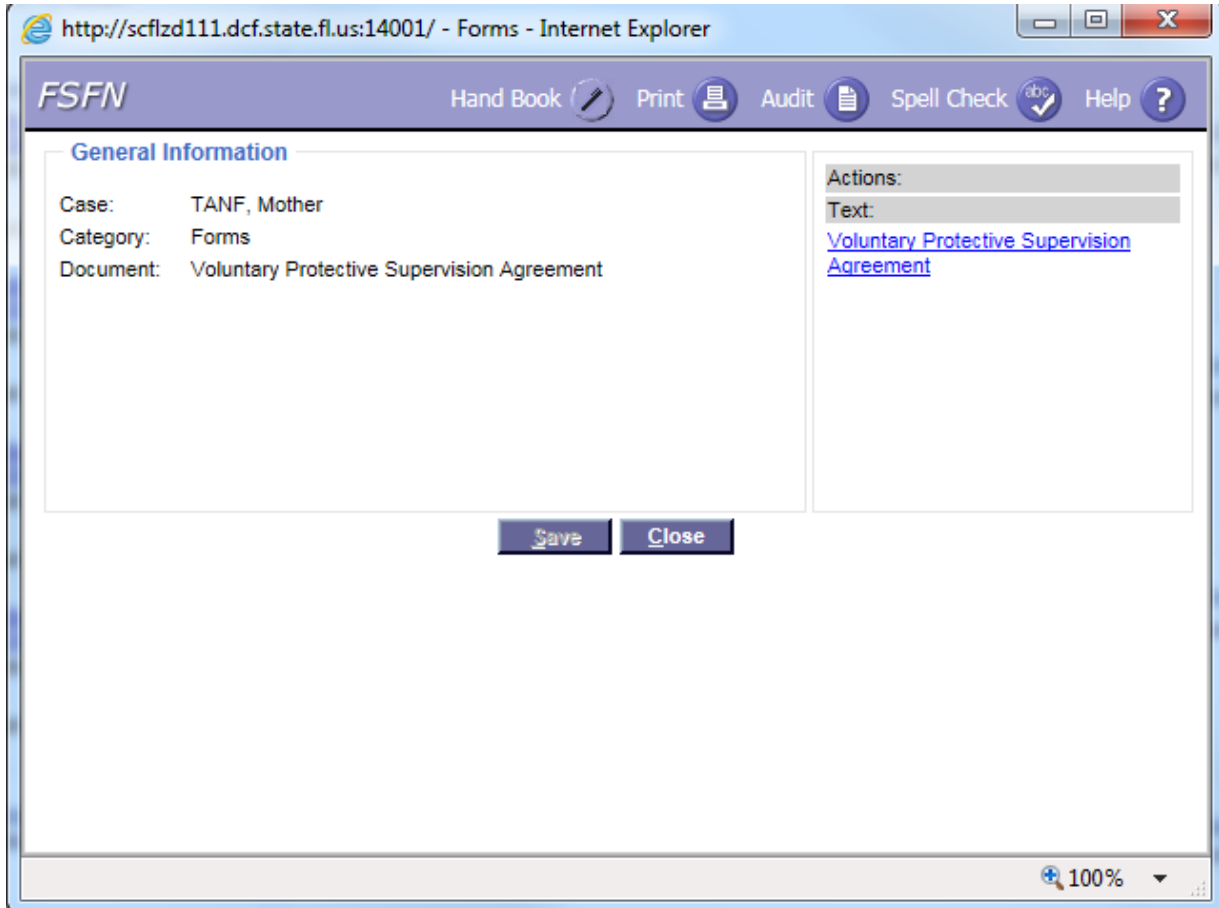
The screenshot shows the FSFN web application interface. At the top, there is a navigation bar with the FSFN logo and several utility icons: Hand Book, Print, Audit, Spell Check, and Help. Below the navigation bar is a 'General Information' section with the following fields:

- Case: Referral, Mother
- Category: Forms
- Document: Voluntary Protective Supervision Agreement

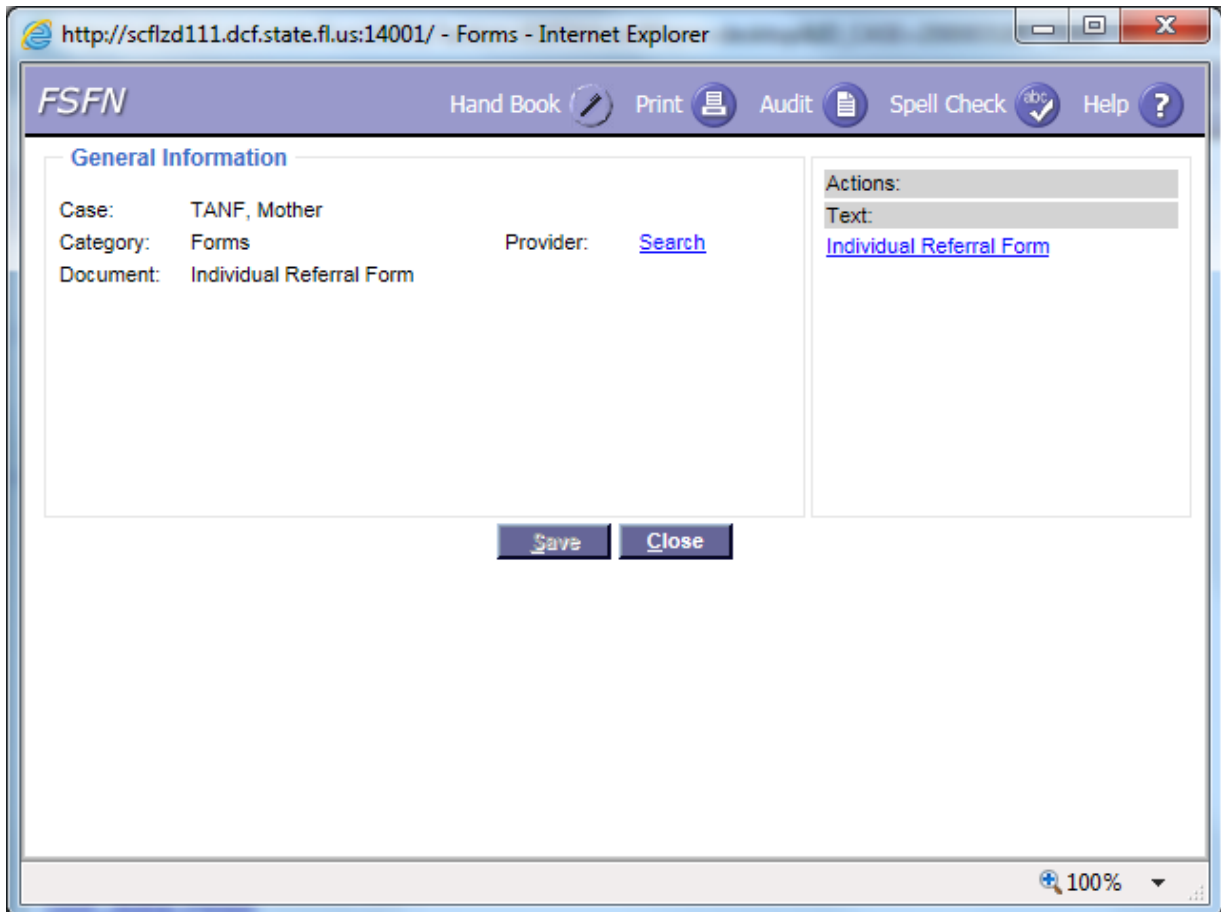
Below the 'General Information' section is an 'Options' dropdown menu. The dropdown is currently open, showing two options: 'Text' and 'Voluntary Protective Supervision Agreement'. To the right of the dropdown is a 'Go' button. Further to the right are 'Save' and 'Close' buttons.



Screenshot #2 – FSDMM Security User Group



Screenshot #3 – FSDMM Security User Group – Provider Search



1.2.2.1. Page Overview

Navigation

The Forms page is accessed either by the Case Work or through the Create menu item on the desktop. The worker selects the appropriate document from the Create Case Items (using Forms or Tx Planning dropdowns) group box. The worker will then select the Case and Case Participants and click the Create button to launch the Forms page. If no case participant(s) need to be associated with the form the Case Participant group box will be disabled.

On the Forms page, the Case (or Provider), Category, and Document name is displayed. The worker selects the Text option from the Options dropdown and click on the Go button. The appropriate document will be launched in Microsoft Word. Once the document is launched, the user may update any narrative information before printing the document.

Page Summary



The Forms page assists in the creation of commonly used documents by pre-filling fields where possible, and provides a system link to the documents that need to be produced in the process of providing services.

When the page is activated, the name of the case, or provider, and the subject specified on the Create Case Work page pre-fill the Case (or Provider) and the Category fields, respectively. The document name, to be created, pre-fills in the Document field. When the Form selected is any one of the following, the Provider field label will display along with the Search hyperlink to launch the Provider Search page and select the applicable Provider: Individual Referral Form; Family Referral Form; CF 5341 - Psychiatric Evaluation Referral; and CF-FSP 5074 – Family Social and Medical History of Child to be Adopted.

If a document does not require supervisory approval, the Approval option will not appear in the Options dropdown or in the Actions panel on the Forms page.

The user may print the document at any time and may return to the document and make modifications at any time. Documents not requiring supervisor approval are never frozen in the system.

In addition, based on the user’s Security User Group the page will either contain the Options drop down or the Actions panel, as reflected in the screenshots above, but the functionality is the same.

1.2.2.2. Page Information

Group Box	General Information	
Fields	Case (or Provider)	Case (or Provider) for which the document is being created; system derived from the information specified in the Case (or Providers) group box on the Create Case Work (or Create Provider Work) page; not user modifiable.
	Category	Category of the document that is being created; system derived from the information specified in the Create Case Items (or Create Provider Items) group box on the Create Case Work page; not user modifiable.
	Document	Name of the document that is being created; system derived from the information specified in the dropdown in the Create Case Items (or Create Provider



		Items) group box on the Create Case Work page; not user modifiable.
	Provider	<p>Only Pre-fills with the FSFN Provider Name when the Form page is launched for the following Documents Type:</p> <p>Individual Referral Form</p> <p>Family Referral Form</p> <p>CF 5341 - Psychiatric Evaluation Referral</p> <p>CF-FSP 5074 – Family Social and Medical History of Child To be Adopted</p>
	Search	<p>Only available for the following Documents Type:</p> <p>Individual Referral Form</p> <p>Family Referral Form</p> <p>CF 5341 - Psychiatric Evaluation Referral</p> <p>CF-FSP 5074 – Family Social and Medical History of Child to be Adopted</p> <p>Upon clicking the hyperlink, the FSFN Provider Search (data Retrieval) page is launched to search and select a Provider. The Provider Search is launched with the option to only select one provider at a time. After user selects and clicks Continue, the selected Provider is returned and pre-filled on the Forms Page Provider field</p>
Options	Text	Contains the name of the document identified in the Document field. Allows the worker to access the document through Microsoft Word.
Buttons	Go	Accesses the document (as specified in the Document field and chosen from the Options dropdown) in Microsoft Word.
	Save	Standard Save processing



	Close	Standard Close processing
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1.2.2.3. Background Processing

- None

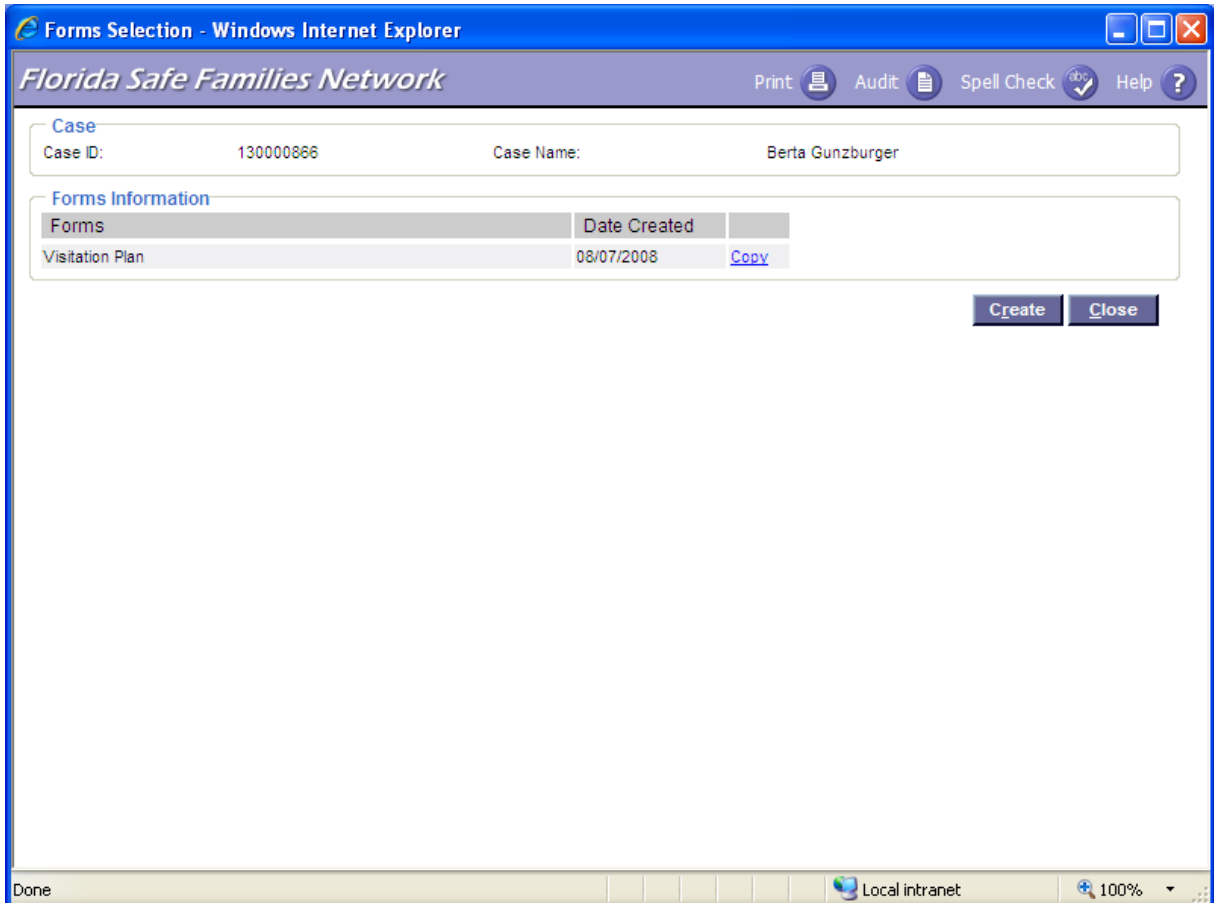
1.2.2.4. Save Processing -- Forms

- Save processing is initiated by clicking on the Save 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.” When a form is created and saved, the information specified on this page is saved to the Assessment table.

1.2.2.5. CRUD Matrix

Table Name	Create	Read	Update	Delete
ASSESSMENT	X	X	X	
DOCUMENT_TEXT	X	X	X	
DOCUMENT_MGMT	X	X	X	

1.2.3. Pop-up Page – Forms Copy Over



Forms Selection - Windows Internet Explorer

Florida Safe Families Network

Print Audit Spell Check Help

Case

Case ID: 130000866 Case Name: Berta Gunzburger

Forms Information

Forms	Date Created	
Visitation Plan	08/07/2008	Copy

Create Close

Done Local intranet 100%

1.2.3.1 Pop-up Page Overview

Page Navigation

The Forms Copy Over page is accessed by selecting Create > Case Work from the main menu, and then selecting the desired document under the Forms dropdown field, selecting the applicable case and case participant and then clicking the Create button. An exception to this is the Unified Home Study (with Approval) launched from the Person Provider page and Licensing page and the Re-licensing Summary for a CPA/CCA (with Approval). If no case participant(s) need to be associated with the form the case participant group box will be disabled. The Forms Copy Over page only displays if the selected form has been created for a participant within the Case for the following forms:

- Case Transfer Staffing (ESI)
- Visitation Plan (Note: launches from the Create Case Work – Tx Planning menu instead of Forms)



- Individual Referral Form
- Family Referral Form
- Trust Account Expenditure Plan
- Independent Living Program Referral
- Reunification Home Study (Note: launched from the Create Case Work –T x Planning menu instead of Forms)
- Voluntary Protective Supervision Agreement
- Notice of Fee Assessment- CF285D
- At-Risk Child Application and Authorization
- Unified Home Study (with approval) (when launched from the Person Provider record and Licensing page)
- Re-licensing Summary for a CPA/CCA (with approval) (when launched from the Person Provider record and associated piece of work).

Page Summary

The Forms Copy Over pop-up page allows a worker to copy any participant's document to create a document for any participant with in the same case. The information from the existing selected document will populate into the new document.

The pop-up page will display all existing previously created forms of the same type, for the selected case, sorted by the Person ID number in ascending order, and then by creation date of the template, in descending order.

The user can select the Copy hyperlink next to any row (for the same participant or for other participant in the case) to copy the selected row as the basis for the new template being created. Only user-entered fields will be copied to the new template to allow editing. The pre-filled fields on the new document will be populated with the information specific to the newly selected participant. If the user does not desire to copy any row, selecting the Create button will take the user to the appropriate Forms page where the worker will be able to select a new, blank document form the options dropdown.



1.2.3.2 Page Information

Group Box	Case	
Fields	Case ID	Pre-fills with the FSFN Case ID
	Case Name	Pre-fills with the FSFN Case Name
Group Box	Forms Information	Group box contains the following columns: Forms; Date Created and Action link; system derived displaying all the documents created from Forms associated with the case.
Fields	Forms	The name of the Document previously created and saved in FSFN, and available for selection and copy over. Pre-filled, plain text displays.
	Date Created	The Date the existing template was created and saved in FSFN.
Hyperlink	Copy	A hyperlink that initiates the process of copy-over.
Buttons	Create	Launches the appropriate Forms page where the work can launch a blank template. No template will be copied
	Close	Standard Close processing

1.2.3.3 Background Processing

- When the worker creates a template for a participant in case, and no prior template exists for this case, the Forms Copy Over page is not launched. The worker is taken directly to the Form page to launch the desired document.

1.2.3.4 Save Processing – Forms Copy Over

- Save processing is initiated by clicking on the Save button. Save processing is also initiated when selecting the Close button, and then answering “Yes” when a form is created and saved, the information specified on this page is saved to the Assessment table.

1.2.3.5 CRUD Matrix

Table Name	Create	Read	Update	Delete
ASSESSMENT	X	X	X	



Florida Safe Families Network

DOCUMENT_TEXT	X	X	X	
DOCUMENT_MGMT	X	X	X	



1.3. Inventories

1.3.1. Table Descriptions

Table Name	Description
ASSESSMENT	The ASSESSMENT table contains information about the assessment/study that is conducted by the worker for a specific case. Information such as case identification information, approval information, and dates. Processes of SM07 (Assessment) create and update assessment information.
DOCUMENT_MGMT	This table is used to transfer documents from one office to another.
DOCUMENT_TEXT	This table is used to save copies of any templates created from pages.

1.3.2. Reference Data

- None

1.3.3. Automated Messages

- None

1.3.4. Checklists

- None

1.3.5. Ticklers

- None

1.3.6. Notification/Templates

Create>Case Work>Forms

- Case Transfer Staffing (ESI)
- Family Referral Form
- Individual Referral Form
- ICPC Form 100A
- ICPC Form 100B
- CF-FSP 5074 – Fmly, Soc. And Medcl. Info abt Child to be Adopted



- CF-FSP 5341 – Psychiatric Evaluation Referral for CPS
- Trust Account Expenditure Plan
- JR Notice to Child
- JR Notice to Guardian ad Litem
- JR Notice to OOH Caregiver
- JR Notice to Parents
- JR Notice to Parents Attorney
- JR Notice to Tribe
- JRSSR to Child
- JRSSR to Guardian and Litem
- JRSSR to OOH Caregivers
- JRSSR to Parent’s Attorney(s)
- JRSSR to Parents – Legal Guardians
- JRSSR to Tribe
- Judicial Review Notice and JRSSR Enclosure
- Independent Living Program Referral
- Voluntary Protective Supervision Agreement
- Notice of Fee Assessment- CF285D
- At-Risk Child Application and Authorization

Person Provider

- Unified Home Study (with approval) (Launched from associated piece of work)

Licensing

- Re-licensing Summary for a CPA/CCA (with approval) (Launched from associated piece of work)

Planning

- Refrigerator Case Plan Summary - Mother (Note: launched from the Tx Planning menu instead of Forms)
- Refrigerator Case Plan Summary - Father (Note: launched from the Tx Planning menu instead of Forms)



- Reunification Home Study
- Visitation Plan

1.3.7. Reports

- None

1.3.8. Triggers

- None

1.4. Batch Programs

- None

1.5. Requirements

- FMF-001
- FMF-004
- FMF-007
- SAH-003
- CMF-004



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