Intake
How Do I … Guide

March 17, 2017

The Florida Safe Families Network (FSFN) How Do I Guide helps you understand the steps to complete your work in the FSFN system. It is a desk reference and companion document to other supporting resources such as, User Guides and Online Help. Visit the DCF FSFN Website (http://fsfn.dcf.state.fl.us) for the User Guide and additional resources.

How Do I…

Work with the Command Center Queue		
How Do I…?	**Selections**	**Tips & Guidelines**
Select a Child Intake from theCommand Center Queue	• From Desktop, click **Utilities**, and then select **Command Center Queue**. • Select check box next to Intake. • Click **Save**. • **Intake** number becomes a hyperlink and an asterisk displays instead of check box. • Click **Intake Number** hyperlink. • **Intake** page displays.	*The Command Center Queue displays all Intakes received through the Avaya system and interfaced to FSFN.* *The queue filters by Program Type, Recommended Screening Decision, and Final Decision.* *The Intake Number, Intake Name, and Date/Time Received sort ascending and descending.* *The queue can remain open until the Counselor selects Close.* *The Save button is disabled until the Counselor selects the check box.* *The queue refreshes by clicking Refresh if the Counselor has been away from the page for a length of time.* *A Counselor can check out only one (1) Intake at a time.* *Before the Intake is checked out, the Status is Unassigned. When the Counselor selects and saves the Intake, the status changes to Checked Out.* *If the Counselor assigns the Intake to the CPI and does not have the opportunity to complete the background checks, they can release the Intake back to the queue. These Intakes have the status of Released.* *Only the Counselor and the Supervisor see the hyperlink for the Intake that they checked out; for all other users, the Intake is view-only.*
Release a Child Intake back to the Command Center Queue	• Check out **Intake**. • Link **Intake** to case. • Complete **Assignment**. • **Release** button becomes enabled. • Click **Release**. • **Intake** releases back to **Command Center Queue** for processing.	*The assignment can be either the CPI or the Receiving Unit when the Release button becomes enabled.* *The Released Intakes are only for the Intakes that have Background Checks set to "Yes".* *Released Intakes have the status of Released and not checked out. This indicates to the Command Center that the Background checks are complete for this Intake.*

Work with the Command Center Queue		
How Do I…?	**Selections**	**Tips & Guidelines**
Update Intake Information group box – Child	• **Date/Time Intake Received** field pre-fills from Interface. • **County** and **Secondary County** pre-fills from Interface. • From **R/T** drop down, select appropriate **Response Time** if not pre-filled from Interface. • **Background Check Required** pre-fills from Interface.	*The County pre-fills from the Interface and is modifiable.* *If the Background Check Required is "Yes", then the background checks are required.* *For Supplemental Intakes, the Background Check Required defaults to "No" and the reason defaults to "Supplemental".* *If a Background Check is not required, the user can select No and select a reason why it is not needed.*

Work with the Command Center Queue

How Do I…?	Selections	Tips & Guidelines
Update Participants tab – Child	• All **Participants** pre-fill from Interface. • All **Reporter** Information pre-fills from Interface.	*The Participants tab consists of two (2) group boxes. The boxes are Intake Participants and Reporter.* *All information received through the Avaya system pre-fills the appropriate fields on the FSFN Intake page.* *The Reporter Information expando is only accessible to those with the appropriate security.* *The Reporter Information narrative field captures the Reporter Address.* *Once enabled, the fields are modifiable. Participants can be added to the Intake. See steps for creating a child Intake in FSFN.* *If the child has three (3) prior screened out Intakes within a two-year period, a hyperlink displays next to the child's name. If this Intake is screened out, then the 3-Hits Reviewed check box needs to be selected. If the Intake is screened in then the check box does not need to be selected and all screen out Intakes for this child resets to zero (0). The next time an Intake comes in for this child and is screened out the count restarts for the 3-Hits within the two-year period.* *If any demographic changes are made on CRM in the participant detail narrative, then the CRM Demographic Changes are available in the Options drop down. This page stays open so the Command Center Counselor can update the person management for this participant. Once finished, the Counselor must click Close to close the page.* *If Duplicates are selected in CRM, the Duplicate column displays Yes next to the participant. The Counselor needs to search in FSFN and correct the duplicate by performing a merge.*

Process a Child Intake selected from the Command Center Queue		
How Do I…?	**Selections**	**Tips & Guidelines**
Participants tab – Child		*If the question on CRM for the Adult having access to the child within the next 24 hours is selected, the 24 Access column displays Yes next to the Adult.*
Relationship tab – Child	• Click **Relationship** tab. • All **Relationships** pre-fill from Interface.	*All Relationships map from the Interface. These fields are modifiable.* *The Relationship tab establishes the relationships between the subjects in the Intake.* *For Child Intakes, the page pre-fills with the appropriate number of rows based on the number of adults and children identified on the Participants tab of the Intake page.* *Users are required, at a minimum, to complete the relationships between the various adults and children in the Intake, which are pre-filled based on the participants' ages. Clicking Insert allows the user to insert additional relationships amongst the adults and children.* *The intake types dynamically drive the relationship values and are editable until the intake is frozen.*

Process a Child Intake selected from the Command Center Queue

How Do I…?	Selections	Tips & Guidelines
Allegations tab – Child	• Click **Allegation** tab. • All **Allegations** pre-fill from Interface.	*All Allegations map from the Interface and are modifiable. New Allegations can be added to the Intake.* *This tab displays only when the Intake type is Adult or Child. The Allegations tab establishes and describes specific allegations of abuse or neglect reported to the agency.* *Clicking the Add Allegations button moves the selected victim(s) and the selected maltreatment codes to the Selected Allegations group box. Each row within the Selection Allegations group box can be deleted by clicking the Delete hyperlink.* *Once allegations have been selected on the Add Allegations pop-up page, they can be updated and/or deleted from the Allegations tab of the Intake page. Each allegation displays on the Allegations tab as a drop down, including the name of the Alleged Victim(s).* *The CRM Template displays all maltreatments entered on CRM and mapped from the Interface. From the Options drop down, select the CRM template with/without Reporter Narrative. Any Child Intake created in FSFN following the Release Date of March 17, 2017 would no longer have the option available to select the CRM template with/without Reporter Narrative.* *If the Investigative Sub Type selected is Institutional, a Provider Search hyperlink displays to the right of the Investigative Sub Type drop down. Upon clicking the hyperlink, the Provider Search page displays, and an appropriate provider can be searched for and selected.* *The Provider displays in the Provider Detail narrative. The Provider is modifiable; however, the Provider that displays in the Provider Detail narrative remains the same entered in CRM and mapped from the Interface.*

Process a Child Intake selected from the Command Center Queue		
How Do I…?	**Selections**	**Tips & Guidelines**
Victim/Child Location tab – Child	• Click **Victim/Child Location** tab. • **Directions** and **Worker Safety Concerns** pre-fill from Interface.	*All Victim/Child information maps from the Interface. These fields are modifiable.* *The Victim/Child Location tab contains two group boxes: The boxes are* Directions *and* Victim/Child Location Details. *The Victim/Child Location tab documents the immediate location of the child or adult victims.* *The Narrative for Worker Safety Concerns text field is disabled unless the Worker Safety Concerns check box is selected, at which time the Narrative for Worker Safety Concerns text field becomes enabled and required.* *If inserted in error, a Victim/ Child Location Details record can be deleted by clicking the associated Delete hyperlink. Prior to validating the address, the hyperlink is labeled 'Delete Victim/ Child Location Details.'*
Prior Intakes and Investigations/ Referrals tab – Child	• Click **Prior Intakes and Investigations/Referrals** tab. • All historical **Intakes** and **Investigations/Referrals** pre-fill on this tab.	*The Prior Intakes and Investigations/ Referrals tab displays all historical intakes and investigations/referrals involving persons who are also included on the current Intake.* *Selecting this tab refreshes the page to retrieve the latest information (in case a new participant is added to the Intake) until the Screening Decision is made and saved, at which point the Intake becomes frozen.* *Clicking the View hyperlink opens the associated Intake page in view-only mode.* *The Prior Intakes group box sorts by Intake Type (Child Intake, Adult Intake, Special Conditions Intake, and Service Referral Intake) and sorted by Date/Time Received within each Intake grouping in reverse chronological order.* *The Prior Investigations/Referrals group box sorts by Intake ID in reverse chronological order.*

Process a Child Intake selected from the Command Center Queue		
How Do I…?	**Selections**	**Tips & Guidelines**
Create a Background Check–Child	• From **Options** drop down, select ***Intake Participant Background Check***. • Click **Create** hyperlink. • Complete **Background Checks** for all participants. • On **Background Screening** page, select **Completed Background Check** check box. • Click **Save**. • Click **Close**. • On **Intake Background Check** page, select **Complete Background Check**. • Click **Save**. • Click **Close**.	*Refer to the SM22 Background Check HDI Guide*

Process a Child Intake selected from the Command Center Queue		
How Do I…?	**Selections**	**Tips & Guidelines**
Document the Decision tab – Child	• Click **Decision** tab. • In **Decision** group box, screen **Intake**. • Clicking a screening radio button enables **Reason** drop down. • Click **Save**. • Click **Create/Link Case** hyperlink. • **Search Case** pop-up page displays. • Select appropriate **Case** or click **Create**. • **Maintain Case** page displays. • Select appropriate value from **Family Structure** drop down. • Click **Save**. • Click **Close**.	*The Decision tab consists of three (3) group boxes: Recommendation, Decision, and CI Unit Documentation* *Only Command Center Counselors and/or Command Center Supervisors document the screening decision within the Decision group box. Both the Recommendation and Decision group boxes default the screening decision to 'Pending.'* *The CI Unit Documentation group box displays only for the Child, Adult, and Special Conditions Intakes. The Service Referral Intakes, created by the CBC workers, do not display the CI Unit Documentation group box and the processing associated with it. Only the CI Unit documents the fields contained within the CI Unit Documentation group box.* *The Search Case pop-up page displays all cases, of the same Intake Type, within which any of the current Intake Participants are Case Participants. The user can choose to select the radio button of an applicable FSFN Case, click Continue, and save the Maintain Case page.* *If Screen-In was the decision, and Save on the Decision tab is selected, the system sends an automated message to each worker (excluding the Command Center Counselor and Supervisor) with an open assignment to a Case for which each participant of the Intake is an active participant.* *If Screen-Out was the decision, and Save on the Decision tab is selected, the system sends an automated message to each worker (excluding the Command Center Counselor and Supervisor) with an open assignment to a Provider for which each participant of the Intake is an active member.*

Process a Child Intake selected from the Command Center Queue		
How Do I…?	**Selections**	**Tips & Guidelines**
Document the Decision tab – Child (cont.)		*When an Intake (regardless of Access Type) is entered in FSFN and the "Send Florida Administrative Message to Law Enforcement" check box on the Decision tab on the Intake page is checked, Florida Administrative Message (FAM) is sent automatically from FSFN to FDLE.* *The "Send Florida Administrative Message to Law Enforcement" check box defaults to checked when the following screen-out reasons are chosen for an Intake or Special Condition:* *Alleged Juvenile Sexual Offender between the ages of 13-17Caregiver Statutory Guidelines not met.* *If the Intake has the 3-hits for a child and the Intake is screened out, then the 3-Hits Reviewed check box needs to be checked.* *If the Reporter type is Law Enforcement, then the Law Enforcement Notified checkbox is selected.* *If the Intake was created when the FSFN application was down then the FSFN Downtime check box is checked.* *For Additional or Supplemental Intakes, upon the Command Center Counselor assigning the Intake, directly to the CPI/API or to the applicable Receiving Unit, the system automatically links the Additional or Supplemental Intake to the applicable Investigation/Special Conditions Referral. This includes both Screen In and Screen Out decisions. Therefore, upon launching the Investigation/Special Conditions Referral, the automatically linked, sequenced Intake displays on the Intakes tab of the Investigation/Special Conditions Referral page.*

Process all other Intake types selected from the Command Center Queue		
How Do I…?	**Selections**	**Tips & Guidelines**
Select an Adult Intake from the Command Center Queue	• From the Desktop, select ***Command Center Queue*** from the **Utilities** Menu. • Select the check box next to the **Intake**. • Click **Save**. • The **Intake number** becomes a hyperlink and an asterisk displays instead of the check box. • Click the **Intake Number** hyperlink. • The **Intake** page displays.	*The Command Center Queue displays all Intakes that are received through the Avaya system and interfaced to FSFN.* *The queue can be filtered by Program Type, Recommended Screening Decision and Final Decision.* *The Intake Number, Intake Name and Date/Time Received CRM sorts by ascending or descending order.* *The queue can remain open until the Counselor selects Close.* *The Save is disabled until the Counselor selects the check box.* *The queue can be refreshed by clicking Refresh if the Counselor has been away from the page for a period of time.* *Only one Intake can be checked out by one Counselor at a time.* *Before the Intake is checked out, the Status is Unassigned. When selected and saved, the Intake status changes to Checked Out.* *The Intake releases back to the queue if the Counselor assigns the Intake to the CPI and does not have the opportunity to complete the background checks. These Intakes have the status of Released.* *Only the Counselor and the Supervisor see the hyperlink for the Intake that they checked out. For all other users the Intake is view only.*
Intake Information group box – Adult	• The **Date/ Time Intake Received** field pre-fills from the **Interface**. • The **County** and **Secondary County** pre-fills from the **Interface**. • The **R/T** drops down pre-fills from the Interface, if not, select the appropriate **Response Time**. • The **Background Check Required** pre-fills from the **Interface**.	*The County pre-fills from the Interface however, it is enabled and can be changed.* *If the Background Check Required is "Yes" then the background checks are required to be completed.*

Process all other Intake types selected from the Command Center Queue		
How Do I…?	**Selections**	**Tips & Guidelines**
Participants tab-Adult	• All **Participants** pre-fill from the **Interface**. • All **Reporter Information** pre-fills from the **Interface**.	*The Participants tab consists of two group boxes. The boxes are Intake Participants and Reporter.* *All information pushed to the Web Service from CRM pre- fills the appropriate fields on the FSFN Intake page.* *The Reporter Information expando is only accessible to those with the appropriate security.* *The Reporter Information narrative field is used to capture the Reporter Address.* *If the fields are enabled then they can be modified.* *Participants can be added to the Intake. See steps for creating a child Intake in FSFN.*
Relationship tab - Adult	• Click the **Relationship** tab. • All **Relationships** pre-fill from the **Interface**.	*For Adult Intakes, the page only pre-populates if there is a child on the Intake. Otherwise, no relationships display.* *All Relationships are mapped from the Interface. These fields are enabled and can be updated.*

Process all other Intake types selected from the Command Center Queue		
How Do I…?	**Selections**	**Tips & Guidelines**
Allegations tab - Adult	• Click the **Allegation** tab. • All **Allegations** pre-fill from the **Interface**.	*All Allegations map from the Interface. These fields are modifiable. New ones can be added to the Intake.* *This tab displays only when the Intake type is Adult or Child. The Allegations tab establishes and describes specific allegations of abuse or neglect reported to the agency.* *Selecting the Add Allegations button moves the selected victim(s) and the selected maltreatment types to the bottom Selected Allegations group box. Each row within the Selection Allegations group box can be deleted by selecting the Delete hyperlink.* *Once allegations have been selected on the Add Allegations pop-up page, they can be updated and/or deleted from the Allegations tab of the Intake page. Each allegation displays on the Allegations tab as a drop down, including the name of the Alleged Victim(s).* *The CRM Template displays all maltreatments entered on CRM and mapped from the Interface. From the Options drop down select the CRM template with/without Reporter Narrative.* *If the Investigative Sub Type selected is Institutional, a Provider Search hyperlink displays to the right of the Investigative Sub Type drop down. Upon selecting the hyperlink, the Provider Search page displays, and appropriate provider can be searched and selected.* *The Provider displays in the Provider Detail narrative. The Provider can be changed however, the Provider that displays in the Provider Detail narrative remains the same as this was entered in CRM and mapped from the Interface.*

Process all other Intake types selected from the Command Center Queue		
How Do I…?	**Selections**	**Tips & Guidelines**
Victim/Child Location tab - Adult	• Click the **Victim/Child Location** tab. • The **Directions** and **Worker Safety Concerns** pre-fill from the **Interface**.	*All Victim/Child information is mapped from the Interface. These fields are enabled and can be updated.* *The Victim/Child Location tab contains two group boxes. The boxes are Directions and Victim/Child Location Details.* *The Victim/Child Location tab is used for documenting the immediate location of the child or adult victims.* *The Narrative for Worker Safety Concerns text field is disabled unless the Worker Safety Concerns check box is selected, at which time the Narrative for Worker Safety Concerns text field becomes enabled and required.* *If inserted in error, a Victim/ Child Location Details record can be deleted by selecting the associated Delete hyperlink. Prior to validating the address, the hyperlink is labeled 'Delete Victim/ Child Location Details.'*
Prior Intakes and Investigations/ Referrals tab – Adult	• Click the **Prior Intakes and Investigations/Referrals** tab. • All historical **Intakes and Investigations/Referrals** pre-fill on this tab.	*The 'Prior Intakes and Investigations/ Referrals' tab displays all historical intakes and investigations/referrals involving persons who are also included on the current Intake.* *Selecting this tab refreshes the page to pull the latest information (in case a new participant is added to the Intake) until the Screening Decision is made and saved, at which point the Intake becomes frozen.* *Selecting the View hyperlink opens the associated Intake page in view-only mode.* *The Prior Intakes group box is sorted by Intake Type (Child Intake, Adult Intake, Special Conditions Intake, and Service Referral Intake) and sorted by Date/Time Received within each Intake grouping in reverse chronological order.* *The Prior Investigations/Referrals group box is sorted by Intake ID in reverse chronological order.*

Process all other Intake types selected from the Command Center Queue		
How Do I…?	**Selections**	**Tips & Guidelines**
Create a Background Check - Adult	• From the **Options** drop down, select ***Intake Participant Background Check***. • Click the **Create** hyperlink. • Complete the **Background Checks** for all participants. • Select the **Completed Background Check** check box on the **Background Screening** page. • Click **Save** and **Close**. • Select the ***Complete Background Check*** on the **Intake Background Check** page. • Click **Save** and **Close**.	*Refer to the SM22 Background Check How Do I Guide.*

Process all other Intake types selected from the Command Center Queue		
How Do I…?	**Selections**	**Tips & Guidelines**
Document the Decision tab - Adult	• Click the **Decision** tab. • In the **Decision** group box, screen the **Intake**. • Clicking a screening radio button, enables the **Reason** drop down. • Click **Save**. • Click the **Create/Link Case** hyperlink. • The **Search Case** pop-up page displays. • Select the appropriate **Case** radio button or click **Create**. • The **Maintain Case** page displays. • Select the appropriate value from the **Family Structure** drop down field. • Click **Save**. • Click **Close**.	*The Decision tabs consist of three group boxes. The group boxes are Recommendation, Decision, and CI Unit Documentation.* *The Decision Recommendation is mapped from the Interface and displays the CRM system recommendation and/or the reason why the Counselor made a decision to override the system recommendation.* *Only Command Center Counselors and/ or Command Center Supervisors document the screening decision within the Decision group box. Both the Recommendation and Decision group boxes default the screening decision to 'Pending.'* *The CI Unit Documentation group box displays only for the Child, Adult, and Special Conditions Intakes. The Service Referral Intakes, created by the CBC workers, do not view the CI Unit Documentation group box and the processing associated with it. Only the CI Unit documents the fields contained within the CI Unit Documentation group box.* *The Search Case pop-up page displays all cases, of the same Intake Type, within which any of the current Intake Participants are Case Participants. The user can choose to select the radio button of an applicable FSFN Case, click Continue, and save the Maintain Case page.* *If Screen-In was the decision, and Save on the Decision tab is selected, the system sends an automated message to each worker (excluding the Command Center Counselor and Supervisor) with an open assignment to a Case for which each participant of the Intake is an active participant.*

Process all other Intake types selected from the Command Center Queue		
How Do I…?	**Selections**	**Tips & Guidelines**
Document the Decision tab – Adult (cont.)		*If Screen-Out was the decision, and Save on the Decision tab is selected, the system sends an automated message to each worker (excluding the Command Center Counselor and Supervisor) with an open assignment to a Provider for which each participant of the Intake is an active member.* *For Additional or Supplemental Intakes, upon the Command Center Counselor assigning the Intake, directly to the CPI/API or to the applicable Receiving Unit, the system automatically links the Additional or Supplemental Intake to the applicable Investigation/Special Conditions Referral.* *This includes both Screen In and Screen Out decisions. Therefore, upon launching the Investigation/Special Conditions Referral, the automatically linked, sequenced Intake displays on the Intakes tab of the Investigation/Special Conditions Referral page.*
Process a Special Conditions Intake	• Select the **Intake** from the **Command Center Queue.** • Click **Save**. • The **Intake** number displays as a hyperlink. • Click the **Intake** number hyperlink • The **Intake** page displays. • Follow the same steps for the **Child Intake**.	*The third tab on a Special Conditions Intake is the only difference from the Child or Adult Intake.* *The field label 'Intake Name' displays as 'SC Referral Name' for Special Conditions Intakes.* *The roles captured on the Roles pop-up page are derived based on the Intake Type.*

Process all other Intake types selected from the Command Center Queue		
How Do I…?	**Selections**	**Tips & Guidelines**
Process an Additional Intake	• Select the **Intake** from the **Command Center Queue**. • Click **Save**. • The **Intake** number displays as a hyperlink. • Click the **Intake** number hyperlink. • The **Intake** page displays. • From the **Decision** tab, screen the **Intake**.	*All Information maps from the Interface. When the Counselor selects the create sequence for the Additional, the system automatically retrieves the most updated Allegation and Participant information and populates those sections of the Intake page.* *The allegations are pre-populated from all preceding sequences, as well as those documented within the associated Investigation, if applicable.* *The participants pre-populate from the associated Investigation, if created. If no investigation exists, the participants are pre-populated from the most recent intake.* *The Allegations tab of the Intake page for Additional and Supplemental Intakes contains two group boxes labeled 'Previous Allegations' and 'Allegations.'* *In the Intake Information group box the field, Sub Type is enabled. The Command Center Counselor is able to change the Intake to a Supplemental.* *For Additional or Supplemental Intakes, upon the Command Center Counselor assigning the Intake, directly to the CPI/API or to the applicable Receiving Unit, the system automatically links the Additional or Supplemental Intake to the applicable Investigation/Special Conditions Referral.*

Process all other Intake types selected from the Command Center Queue

How Do I…?	Selections	Tips & Guidelines
Process a Supplement al Intake	• Select the **Intake** from the **Command Center Queue**. • Click **Save**. • The Intake number displays as a hyperlink. • Click the **Intake number** hyperlink • The **Intake** page displays. • From the **Decision** tab, screen the **Intake**.	*All Information maps from the Interface. When the Counselor selects the create sequence for the Additional, the system automatically retrieves the most updated Allegation and Participant information and populates those sections of the Intake page.* *The allegations are pre-populated from all preceding sequences, as well as those documented within the associated Investigation, if applicable.* *The participants pre-populate from the associated Investigation, if created. If no investigation exists, the participants are pre-populated from the most recent intake.* *The Allegations tab of the Intake page for Additional and Supplemental Intakes contains two group boxes labeled 'Previous Allegations' and 'Allegations.'* *In the Intake Information group box the field, Sub Type is enabled. The Command Center Counselor is able to change the Intake to a Supplemental.* *For Additional or Supplemental Intakes, upon the Command Center Counselor assigning the Intake, directly to the CPI/API or to the applicable Receiving Unit, the system automatically links the Additional or Supplemental Intake to the applicable Investigation/Special Conditions Referral.*
Process a Web Intake	• Select the **Intake** from the **Command Center Queue**. • Click **Save**. • The **Intake** number displays as a hyperlink. • Click the **Intake** number hyperlink the Intake page displays. • From the **Decision** tab, screen the **Intake**.	*All questions answered on the web relating to the nature surrounding maltreatments, displays on the Child or Adult Web template.* *If the user has uploaded a file to the Web, the file can be located by launching the View Web Attachment page and selecting the file hyperlink.*

Create a Child Intake in FSFN		
How Do I…?	**Selections**	**Tips & Guidelines**
Create a Child Intake (based on appropriate Security)	• From the Desktop, click **Create** from the menu bar. • From the drop down menu, select ***Hotline Intake.*** • From the drop down menu, select ***Child Intake.*** • The **Intake Inquiry Search** page displays.	*All Child Intakes should be created in CRM and interfaced into FSFN. However, an Intake can be created in FSFN based on security.* *An Intake is a tool to aid the user in documenting Child, Adult, and Special Conditions Intakes as outlined by the DCF policies and procedures. The FSFN system allows for the categorization of Intakes. The categorizations are Child Intake, Adult Intake, Special Conditions Intake, and Services Referral.* *NOTE: If a participant is flagged in the FSFN database with a "pre-adoptive" Person ID, they will not be included in the selection provided by an Intake Inquiry Search.*

Create a Child Intake in FSFN

How Do I…?	Selections	Tips & Guidelines
Perform an Intake Inquiry Search	• Enter a name in the **Last Name** field. • Click **Search.** • From the **Persons Returned** group box, drill down on the applicable **Person** icon and verify if the correct person is returned. • Click **Add Participants** if the correct person is returned. • Click **Create** if the incorrect person is returned or no persons are returned. • Click **Continue** after documenting the participant's information on the **Create Person** page. • Repeat process to include other case participants • Click **Continue**. • The **Intake page** displays and defaults to the **Participants** tab.	*The Intake Inquiry Search page automatically displays first.* *When the search results returns, a user can drill down on the Person and Related People icons, within the Persons Returned group box, and select hyperlinks displays for the related person(s).* *NOTE: If a participant is flagged in the FSFN database with a "pre-adoptive" Person ID, they will not be included in the selection provided by an Intake Inquiry Search The Select Merge hyperlink allows the user to select up to three people into the "Merge (#)" bucket. This allows the user tonot only initial a request to merge duplicates that present themselves in the search process but also to compare the person data of up to 3 persons to help fine tune their search results* *The system identifies and makes more visible the duplicated SSN's (bolded duplicate SSN).* *If you create a new person with a duplicate SSN, the Potential Person matches page displays. You have to view every duplicate SSN before you can allow the duplicate SSN or, select one of the Potential Matches. If you select a person then Continue is enabled. If you want to allow the duplicate SSN and have viewed all the duplicate person records then the Allow Duplicate SSN button is enabled. Once viewed the persons record displays the Viewed icon with a check mark.* *When searching for a participant, the system allows a user to search by SSN. When searching for a person using the SSN field then the following guidelines need to be used:* *You cannot enter a SSN with the following:* • *The first three digits of 000, 666, 900 series* • *The second two digits of 00 or the last four digits of 0000* • *The sequential numbers, 123-45-6789 are not allowed, as well as, numbers that are all the same, for example 1s, 2s, and so forth.*

Create a Child Intake in FSFN

How Do I…?	Selections	Tips & Guidelines
Access Person Book	• From the **Intake Inquiry Search** page, enter a name in the **Last Name** field. • Click **Search**. • In the **Persons Returned** groupbox, click the hyperlink associated with the applicable **Person** icon.	*The Intake Inquiry Search page provides access to Person Book via a hyperlink so that workers can quickly obtain case summary and information on a selected FSFN case.*
Information group box -Child	• The **Date/ Time Intake Received** field pre-fills with the current date. • Enter the appropriate 'Time' with AM/ PM designation. • Select the appropriate **County** from the **County** drop down field. • Select the appropriate ***Response Time*** from the **R/T** drop down field	*When the FSFN Intake page is created from the Desktop the Date/ Time Intake Received field is enabled and user entered. It pre-fills with the current date, but the Time and AM/PM designation doesnot pre-fill.*
Document the Participants tab **- Child**	• Click the **Roles** hyperlink for each participant. • The **Roles** pop-up page displays. • Check the applicable roles. • Click **Continue**. • Click the **Roles** hyperlink for other case participants. • The **Roles** pop-up page displays. • At least one member has to have the role of ***Intake Name*** and ***Perpetrator***. • Click **Continue**. • Access the **Reporter** group box and enter all available information in the appropriate fields.	*The Participants tab - Once the participants are searched and selected, orsearched and created, the tab pre-fills withthe information entered on the Create Person page including name, gender, date of birth, estimated age, race, and ethnicity.* *If there are more participants to be included in the Intake, the worker can click the Add/Edit button and launch the Intake/Inquiry Search page.* *The Participants tab consists of two group boxes. The boxes are Intake Participants and Reporter.* *When the FSFN Intake page is created from CRM, all information pushed to the Web Service from CRM pre-fill the appropriate fields on the FSFN Intake page.* *The Reporter Information expando is only accessible to those with the appropriate security.* *The Reporter Information narrative field captures the Reporter Address.*

Create a Child Intake in FSFN		
How Do I…?	**Selections**	**Tips & Guidelines**
Document the Relationship tab - Child	• Click the **Relationship** tab. • Document the members' relationships • Click **Save**.	*The Relationship tab is used for establishing the relationships between the subjects in the Intake.* *For Child Intakes, the page pre-populates with the appropriate number of rows based on the number of adults and children identified in the Participants tab of the Intake page.* *Users are required, at a minimum, to complete the relationships between the various adults and children in the Intake, which are pre-filled based on the participants' ages.* *Clicking the Insert button allows the user to insert additional relationships amongst the adults and children.* *The relationship values are dynamically driven based on the intake type and are editable until the intake is frozen.* *The Delete hyperlink appears only against those relationship rows inserted by the worker to document additional relationships between adult and children or children and children.*

Create a Child Intake in FSFN

How Do I…?	Selections	Tips & Guidelines
Document the Allegations tab - Child	• Click the **Allegations** tab. • Click **Insert**. • A validation message displays indicating that the page must be saved. • Click **Yes**. • The **Add Allegations** pop-up page displays. • Select the appropriate Maltreatment Code for the Alleged Victim. • Click **Add Allegations**. • Click **Continue**. • Enter the appropriate information regarding case in the **Allegation Narrative** field.	*This tab displays only when the Intake type is Adult or Child. The Allegations tab establishes and describes specific allegations of abuse or neglect reported to the agency.* *Selecting the Add Allegations button moves the selected victim(s) and the selected maltreatment types to the bottom Selected Allegations group box. Each row within the Selection Allegations group box can be deleted by selecting the Delete hyperlink.* *Once selected, allegations on the Add Allegations pop-up page, they can be updated and/or deleted from the Allegations tab of the Intake page. Each allegation displays on the Allegations tab as a drop down, including the name of the Alleged Victim(s).* *If the Investigative Sub Type selected is Institutional, a Provider Search hyperlink displays to the right of the Investigative Sub Type drop down. Selecting the hyperlink, displays the Provider Search page and an appropriate provider can be searched and selected.*
Document the Victim/Child Location tab - Child	• Click the **Victim/Child Location** tab. • Enter the directions in the **Directions** group box to victim/child's current location or home. • Select the **Worker Safety Concerns** check box and enter **Narrative** for **Worker Safety Concerns** if appropriate. • Click **Insert** in the **Victim/Child Location Details** group box if appropriate. • Select Alleged Victim's name from the **Victim/ Child** drop down. • Enter the appropriate address and phone information. • Click the **Validate Address** hyperlink.	*The Victim/Child Location tab contains two group boxes. The boxes are Directions and Victim/Child Location Details.* *The Victim/Child Location tab documents the immediate location of the child or adult victims.* *The Narrative for Worker Safety Concerns text field is disabled unless the Worker Safety Concerns check box is selected, at which time the Narrative for Worker Safety Concerns text field becomes enabled and required.* *If inserted in error, a Victim/ Child Location Details record can be deleted by selecting the associated Delete hyperlink. Prior to validating the address, the hyperlink is labeled 'Delete Victim/ Child Location Details.'*

Create a Child Intake in FSFN		
How Do I…?	**Selections**	**Tips & Guidelines**
Document the Prior Intakes and Investigations/ Referrals tab – Child	• Click the **Prior Intakes and Investigations/ Referrals** tab • All prior intakes display within the **Prior Intakes** group box, each with a **View** hyperlink. • All prior investigations and referrals display within the **Prior Investigations/ Referrals** group box, each with a **View** hyperlink.	*The 'Prior Intakes and Investigations/Referrals' tab displays all historical intakes and investigations/referrals involving persons who are also included on the current Intake. Selecting this tab refreshes the page to pull the latest information (in case a new participant is added to the Intake) until the Screening Decision is made and saved, at which point the Intake becomes frozen.* *Selecting the View hyperlink open the associated Intake page in view-only mode. The Prior Intakes group box is sorted by Intake Type (Child Intake, Adult Intake,* *Special Conditions Intake and Service Referral Intake) and sorted by Date/Time Received within each Intake grouping in reverse chronological order. The Prior Investigations/Referrals group box sorts by Intake ID in reverse chronological order.*
Create a Background Check	• From the **Options** drop down, select ***Intake Participant Background Check***. • Click the **Create** hyperlink. • Complete the **Background Checks** for all participants. • Click the **Completed Background Check** check box on the **Background Screening** page. • Click **Save**. • Click **Close.**	*Refer to the SM22 Background Check HDI Guide.*

Create a Child Intake in FSFN

How Do I…?	Selections	Tips & Guidelines
Document the Decision tab – Child	• Click the **Decision** tab. • In the **Decision** group box, screen the **Intake**. • Upon clicking a screening radio button, the **Reason** drop down becomes enabled. • Click **Save**. • Click the **Create/Link Case** hyperlink. • The **Search Case** pop-up page displays. • Select the appropriate **Case** or **click Create**. • The **Maintain Case** page displays. • Select the appropriate value from the **Family Structure** drop down field. • Click **Save**. • Click **Close**.	*The Decision tabs consist of three group boxes. The group boxes are Recommendation, Decision, and CI Unit Documentation.* *The Recommendation group box displays the final screening decision.* *Only Command Center Counselors and/ or Command Center Supervisors document the screening decision within the Decision group box. Both the Recommendation and Decision group boxes default the screening decision to 'Pending.'* *The CI Unit Documentation group box displays only for the Child, Adult, and Special Conditions Intakes. The Service Referral Intakes, created by the CBC workers, do not view the CI Unit Documentation group box and the processing associated with it. Only the CI Unit documents the fields contained within the CI Unit Documentation group box.* *The Search Case pop-up page displays all cases, of the same Intake Type, within which any of the current Intake Participants are Case Participants. The user can choose to select the radio button of an applicable FSFN Case, select Continue, and save the Maintain Case page.* *If Screen-In was the decision, and the Save on the Decision tab is selected, the system send an automated message to each worker (excluding the Command Center Counselor and Supervisor) with an open assignment to a Case for which each participant of the Intake is an active participant.* *If Screen-Out was the decision, and the Save on the Decision tab is selected; the system sends an automated message to each worker (excluding the Command Center Counselor and Supervisor) with an open assignment to a Provider for which each participant of the Intake is an active member.*

Create a Child Intake in FSFN

How Do I…?	Selections	Tips & Guidelines
Document the Decision tab – Child (cont.)		*For Additional or Supplemental Intakes, upon the Command Center Counselor assigning the Intake, directly to the CPI/API or to the applicable Receiving Unit, the system automatically links the Additional or Supplemental Intake to the applicable Investigation/Special Conditions Referral.* *This includes both Screen In and Screen Out decisions. Therefore, upon launching the Investigation/Special Conditions Referral, the automatically linked, sequenced Intake displayed on the Intakes tab of the Investigation/Special Conditions Referral page.*

Create an Adult Intake in FSFN

How Do I…?	Selections	Tips & Guidelines
Create an Adult Intake (based on appropriate security)	• From the Desktop, click **Create** from the menu bar. • Click **Hotline Intake** from the drop down menu. • Click **Adult Intake** from the drop down menu. • The **Intake Inquiry Search** page displays.	*All Adult Intakes should be created in CRM and interfaced into FSFN. However, an Intake can be created in FSFN based on security.* *An Intake is a tool to aid the user in documenting Child, Adult, and Special Conditions Intakes as outlined by the DCF policies and procedures. The FSFN system allows for the categorization of Intakes. The categorizations are Child Intake, Adult Intake, Special Conditions Intake, and Services Referral.*

Create an Adult Intake in FSFN		
How Do I…?	**Selections**	**Tips & Guidelines**
Perform an Intake Inquiry Search	• Enter a name in the **Last Name** field. • Click **Search.** • From the **Persons Returned** group box, drill down on the applicable **Person** icon and verify if the correct person is returned. • Click **Add Participants** if the correct person is returned. • Click **Create** if the incorrect person is returned or no persons are returned. • Click **Continue** after documenting the participant's information on the **Create Person** page. • Repeat process to include other case participants • Click **Continue**. • The **Intake page** displays and defaults to the **Participants** tab.	*The Intake Inquiry Search page is automatically displays first.* *When the search results return, a user can drill down on the Person and Related People icons, within the Persons Returned group box, and select hyperlinks displayed for the related person(s).* *NOTE: Regardless of age, if a person is flagged in FSFN as "pre-adoptive" status, they will not be returned for selection in an Intake Inquiry Search.* *The Select Merge hyperlink allows the user to select to three people into the "Merge (#)" bucket. This allows the user tonot only initial a request to merge duplicates that present themselves in thesearch process but also to compare the person data of up to 3 persons to help finetune their search results.* *Security controls the person merge process giving some users ability to view only the candidates for Merge, others able to request the merge and those who can complete the process.* *The system identifies and makes more visible the duplicated SSN's (bolded duplicate SSN). If you create a new person with a duplicate SSN, the Potential Person matches page displays.* *If you have a person with a duplicate SSN then you have to view every duplicate SSN before you can allow the duplicate SSN. Once viewed the persons record displays the Viewed icon with a check mark. After viewing the duplicate records, the "Allow Duplicate SSN" button becomes enabled.* *You cannot enter a SSN with the following* • The first three digits of 000, 666, 900 series • The second two digits of 00 or the last

Create an Adult Intake in FSFN

How Do I…?	Selections	Tips & Guidelines
Document the Intake Information group box – Adult	• The **Date/ Time Intake Received** field pre-fills with the current date. • Enter the appropriate 'Time' with AM/ PM designation. • Select the appropriate county from the **County** drop down field. • Select the appropriate **Response Time** from the **R/T** drop down field.	*The Desktop, the Date/ Time Intake Received field is enabled and user entered. It pre-fills with the current date, but the Time and AM/ PM designation does not pre-fill.*
Document the Participants tab - Adult	• Click the **Roles** hyperlink for each participant. • The **Roles** pop-up page displays. • Check the applicable roles. • Click **Continue**. • Click the **Roles** hyperlink for other case participants. • The **Roles** pop-up page displays. • At least one member has to have the role of ***Intake Name*** and ***Perpetrator***. • Click **Continue**. • Access the **Reporter** group box and enter all available information in the appropriate fields.	*The Participants tab - Once the participants are searched and selected, orsearched and created, the tab pre-fills withthe information entered on the Create Person page including name, gender, dateof birth, estimated age, race, and ethnicity.If there are more participants to be included in the Intake, the worker can clickthe Add/Edit button and launch the Intake/Inquiry Search page.* *The Participants tab consists of two group boxes. The boxes are Intake Participants and Reporter.* *For Adult Intakes, at least one adult must have a disability. If the participant already existed in the FSFN database, in order to update the disability information, the user must access the Person Management record via the Intake Inquiry Search page. For that reason, the Disability pop-up page launches in view-only mode. If creating a new participant in FSFN, the user is able to document the applicable disabilities via the Disability pop-up page prior to the first successful save.* *The Reporter Information expando is only accessible to those with the appropriate security.* *The Reporter Information narrative field captures the Reporter Address.*

Create an Adult Intake in FSFN		
How Do I…?	**Selections**	**Tips & Guidelines**
Document the Relationship tab - Adult	• Click the **Relationship** tab. • Document the members' relationships. • Click **Save**.	*For Adult Intakes, no relationship rows pre-fill unless there is a child participant included in the adult intake, for which the system recognize the adult to child relationship. If all participants are adults, the user manually inserts all relationships by clicking Insert, which displays the Subject fields as drop downs to select the appropriate participant from each.*
Document the Allegations tab – Adult	• Click the **Allegations** tab. • Click **Insert**. • A validation message displays indicating. • Click **Yes**. • The **Add Allegations** pop-up page displays. • Select the appropriate Maltreatment Code for the Alleged Victim. • Click **Add Allegations**. • Click **Continue**. • Enter the appropriate information regarding case in the **Allegation Narrative** field.	*This tab displays only when the Intake type is Adult or Child. The Allegations tab creates allegations and describes specific allegations of abuse or neglect reported to the agency.* *For Adult Intakes, if the maltreatment selected is 'Self Neglect,' an Alleged Perpetrator is not required.*

Create an Adult Intake in FSFN

How Do I…?	Selections	Tips & Guidelines
Document the Victim/Child Location tab - Adult	• Click the **Victim/Child Location** tab. • Enter the directions in the **Directions** group box to victim/child's current location or home. • Select the **Worker Safety Concerns** check box and enter **Narrative** for W**orker Safety Concerns,** if appropriate. • Click **Insert** in the **Victim/Child Location Details** group box Concerns if appropriate. • Select Alleged Victim's name from the **Victim/ Child** drop down. • Enter the appropriate address and phone information. • Click the **Validate Address** hyperlink.	*The Victim/Child Location tab documents the immediate location of the child or adult victims and contains two group boxes: The boxes are Directions and Victim/Child Location Details.* *The Victim/ Child drop down, within the Victim/ Child Location Details group box, displays all children for Child, Special Conditions and Service Referral Intakes and all participants with the role of Victim for Adult Intakes.*
Document the Prior Intakes and Investigations/ Referrals tab – Adult	• Click the **Prior Intakes and Investigations/ Referrals** tab • All prior intakes display within the **Prior Intakes** group box, each with a **View** hyperlink. • All prior investigations and referrals display within the **Prior Investigations/ Referrals** group box, each with a **View** hyperlink.	*The 'Prior Intakes and Investigations/ Referrals' tab displays all historical intakes and investigations/referrals involving persons who are also included on the current Intake. Selecting this tab refreshes the page to pull the latest information (in case a new participant is added to the Intake) until the Screening Decision is made and saved, at which point the Intake becomes frozen.* *Selecting the View hyperlink open the associated Intake page in view-only mode. The Prior Intakes group box is sorted by Intake Type (Child Intake, Adult Intake,* *Special Conditions Intake and Service Referral Intake) and sorted by Date/Time Received within each Intake grouping in reverse chronological order. The Prior Investigations/Referrals group box sorts by Intake ID in reverse chronological order.*

Create an Adult Intake in FSFN

How Do I…?	Selections	Tips & Guidelines
Create a Background Check	• From the **Options** drop down, select ***Intake Participant Background Check***. • Click the **Create** hyperlink. • Complete the **Background Checks** for all participants. • Click the **Completed Background Check** check box on the **Background Screening** page. • Click **Save**. • Click **Close**.	*Refer to the Background Check HDI Guide.*

Create an Adult Intake in FSFN

How Do I…?	Selections	Tips & Guidelines
Document the Decision tab - Adult	• Click the **Decision** tab. • In the **Decision** group box, screen the **Intake**. • Upon clicking a screening radio button, the **Reason** drop down becomes enabled. • Click **Save**. • Click the **Create/Link Case** hyperlink. • The **Search Case** pop-up page displays. • Select the appropriate **Case** or click **Create**. • The **Maintain Case** page displays. • Select the appropriate value from the **Family Structure** drop down field. • Click **Save**. • Click **Close**.	*The Decision tabs consist of three group boxes. The group boxes are Recommendation, Decision, and CI Unit Documentation.* *Only Command Center Counselors and/ or Command Center Supervisors document the screening decision within the Decision group box. Both the Recommendation and Decision group boxes default the screening decision to 'Pending.'* *The CI Unit Documentation group box displays only for the Child, Adult, and Special Conditions Intakes. The* *Service Referral Intakes, created by the CBC workers, do not view the CI Unit Documentation group box and the processing associated with it. Only the CI Unit documents the fields contained within the CI Unit Documentation group box.* *The Search Case pop-up page displays all cases, of the same Intake Type, within which any of the current Intake Participants are Case Participants. The user can choose to select the radio button of an applicable FSFN Case, select Continue, and save the Maintain Case page.* *If Screen-In was the decision, and the Save on the Decision tab is selected, the system send an automated message to each worker (excluding the Command Center Counselor and Supervisor) with an open assignment to a Case for which each participant of the Intake is an active participant.* *If Screen-Out was the decision, and the Save on the Decision tab is selected; the system sends an automated message to each worker (excluding the Command Center Counselor and Supervisor) with an open assignment to a Provider for which each participant of the Intake is an active member.*

Create a Special Conditions Intake in FSFN		
How Do I…?	**Selections**	**Tips & Guidelines**
Create an Intake-Special Conditions	• The **Special Conditions Intake** is created in the same manner as **Child** and **Adult Intakes**.	*An Intake is a tool to aid the user in documenting Child, Adult, and Special Conditions Intakes as outlined by the DCF policies and procedures. The FSFN system allows for the categorization of Intakes. The categorizations are Child Intake, Adult Intake, Special Conditions Intake, and Services Referral.* *If Screen-In was the decision, and the Save on the Decision tab is selected, the system send an automated message to each worker (excluding the Command Center Counselor and Supervisor) with an open assignment to a Case for which each participant of the Intake is an active participant.* *If Screen-Out was the decision, and the Save on the Decision tab is selected, the system send an automated message to each worker with an open assignment (excluding the Command Center Counselor and Supervisor) to a Provider for which each participant of the Intake is an active member*
Document the Special Conditions tab	• Click the **Special Conditions** tab. • Select an appropriate value from the **Special Conditions** drop down.	*This tab displays only when the Intake type is Special Conditions.* *The field label 'Intake Name' displays as 'SC Referral Name' for Special Conditions Intakes.* *The roles captured on the Roles pop-up page derive based on the Intake Type.*

Create a Service Referral Intake in FSFN		
How Do I…?	**Selections**	**Tips & Guidelines**
Create an Intake–Service Referral	• From the Desktop, click **Create** from the menu bar. • From the drop down menu, select ***Service Referral***. • The Intake Inquiry Search process is the same as that outlined for Child and Adult Intakes. • Click the **Services** tab. • From the **Services** drop down, select a service.	*An Intake is a tool to aid the user in documenting Child, Adult, and Special Conditions Intakes as outlined by the DCF policies and procedures. The FSFN system allows for the categorization of Intakes. The categorizations are Child Intake, Adult Intake, Special Conditions Intake, and Services Referral.* *Service Referrals are created by CBC workers.* *The field label 'Intake Name' displays as 'Referral Name' for Service Referral Intakes.* *The roles captured on the Roles pop-up page derive based on the Intake Type.*

Create an Additional Intake in FSFN		
How Do I…?	**Selections**	**Tips & Guidelines**
Create an Additional Intake	• Select ***Additional Intake*** from the **Options** drop down of an existing Initial Intake. • Click **Go**.	*Upon selecting the Additional Intake option, the system automatically retrieves the most updated Allegation and Participant information and populates those sections of the Intake page.* *The allegations pre-populate from all preceding sequences, as well as those documented within the associated Investigation, if applicable.* *The participants pre-populate from the associated Investigation, if created. If no investigation exists, the participants are pre-populated from the most recent intake.* *The Allegations tab of the Intake page for Additional and Supplemental Intakes contains two group boxes labeled 'Previous Allegations' and 'Allegations.'* *If an allegation previously identified on an associated sequenced Intake, contains one of the new Maltreatment Codes with Sub Type that value displays in the Previous Allegations group box.* *Intake Counselors and Command Center Counselors can create Additional Intakes at any given time and are no longer restricted to the 30-day rule.* *For Additional or Supplemental Intakes, upon the Command Center Counselor assigning the Intake, directly to the CPI/API or to the applicable Receiving Unit, the system automatically links the Additional or Supplemental Intake to the applicable Investigation/Special Conditions Referral.* *This includes both Screen In and Screen Out decisions. Therefore, upon launching the Investigation/Special Conditions Referral, the automatically linked, sequenced Intake displayed on the Intakes tab of the Investigation/Special Conditions Referral page.*

Create an Supplemental Intake in FSFN

How Do I…?	Selections	Tips & Guidelines
Create a Supplemental Intake	• From the **Options** drop down of an existing Initial Intake, select ***Supplemental Intake***. • Click Go.	*Upon selecting the Supplemental Intake option, the system automatically retrieves the most updated Allegation and Participant information and populates those sections of the Intake page.* *The allegations are pre-populated from all preceding sequences, as well as those documented within the associated Investigation, if applicable.* *The participants pre-populated from the associated Investigation, if created. If no investigation exists, the participants are pre-populated from the most recent intake.* *The Allegations tab of the Intake page for Additional and Supplemental Intakes contains two group boxes labeled 'Previous Allegations' and 'Allegations.'* *If an allegation previously identified on an associated sequenced Intake, contains one of the new Maltreatment Codes with Sub Type that value displays in the Previous Allegations group box.* *Intake Counselors and Command Center Counselors can create Supplemental Intakes at any given time and are no longer restricted to the 60-day rule.* *For Additional or Supplemental Intakes, upon the Command Center Counselor assigning the Intake, directly to the CPI/API or to the applicable Receiving Unit, the system automatically links the Additional or Supplemental Intake to the applicable Investigation/Special Conditions Referral.* *This includes both Screen In and Screen Out decisions. Therefore, upon launching the Investigation/Special Conditions Referral, the automatically linked, sequenced Intake displayed on the Intakes tab of the Investigation/Special Conditions Referral page.*

Perform a Call Record Search

How Do I…?	Selections	Tips & Guidelines
Perform a Call Record Search	• Click **Utilities** from the **Menu** bar. • Select ***Call Record Search*** from the drop down list. • Enter the applicable search criteria. • Click **Search**. • Results are displayed in the **Call**. **Records Returned** group box. • Click the **Call Record Number** hyperlink. • The **Call Record** page displays in view only mode. • Click **Close** on the **Call Record** page. • Click **Close** on the **Call Record Search** page.	*From the Call Record Search page, any of the fields, other than the First and Middle Name fields, can be used as sole search criteria. If a First or Middle Name is entered, then a Last Name must also be entered. However, Last Name can be used as the sole search criteria.* *Wildcard Search functionality can also be employed on the Call Record Search page.*

Access a Call Record from an Intake

How Do I…?	Selections	Tips & Guidelines
Access a Call Record from an Intake	• Select ***Call Record*** from the **Options** drop down list of an existing **Intake** page created from a **Call Record page**. • Click **Go**. • The associated **Call Record** page displays in view only mode.	*When an Intake is created from a Call Record page, which is created through the FSFN CRM Interface, the Call Record page is always accessible in view only mode via the Options drop down on the FSFN Intake page.*

Perform a Reporter Search		
How Do I…?	**Selections**	**Tips & Guidelines**
Perform a Reporter Search	• Click **Utilities** from the **Menu** bar. • Select ***Reporter Search*** from the drop down list. • Enter either the **Last Name** or the **Caller ID**. • Click **Search**. • Results display in the **Intake Returned** group box. • Click the **Intake** hyperlink. • The **Intake** page displays in view only mode. • Click **Close** on the **Intake** page. • Click **Close** on the **Reporter Search** page.	*Only users with the appropriate security can access the Reporter Search page to view Reporter information.* *The Last Name and Caller ID fields can be used as sole search criteria, but all other fields must be used in conjunction with either of these fields.*

View the Counselor Productivity Report		
How Do I…?	**Selections**	**Tips & Guidelines**
View the Counselor Productivity Report	• Click **Utilities** from the **Menu** bar. • Select ***Counselor Productivity Report*** from the drop down list. • Select the ***Worker Name*** from the **Worker Name** drop down field. • Enter the **Received Date Range**. • Click **Search**. • Results display in the **Call Records/ Intakes** returned group box. • Click the **Call Record Number** hyperlink. • The **Call Record** page displays in view only mode. • Click **Close**. • Click the **Intake Number** hyperlink for the **Call Record** page just launched. • The **Intake** page displays in view only mode. • The **Call Record Number** displays in the **Intake Information** group box. • Click **Close** on the **Intake** page. • Click the **Close** on the **Productivity Report** page.	*The Counselor Productivity Report monitors the productivity of Hotline Counselors; include Hotline Supervisors and Hotline Acting Supervisors.* *The Call Record page, associated with the Intake page, can launch from the Options drop down of the Intake page, in view only mode.*

Access the Intake Report Templates		
How Do I…?	**Selections**	**Tips & Guidelines**
Access the Intake Report template	• Select ***Intake Report*** from the Options drop down list. • Click **Go**. The report opens in MS Word.	*The Intake Report template launches with the completed information regarding the intake and is not editable.*

Access the Intake Report with Reporter Narrative Template

How Do I…?	Selections	Tips & Guidelines
Access the Intake Report with Reporter Narrative template	• Select ***Intake Report with Reporter Narrative*** from the **Options** drop down list. • Click **Go**. The report opens in MS Word.	*The Intake Report with Reporter Narrative template launches with the completed information regarding the intake and is not editable.* *The Intake Report with Reporter Narrative template is only accessible to those with the appropriate security.*

Access the CRM Report Template

How Do I…?	Selections	Tips & Guidelines
Access the CRM Report template	• Select ***CRM Intake Report Narrative*** from the **Options** drop down list. • Click **Go**. The report opens in MS Word.	*This report displays the Intake created in CRM.*

Access the CRM Report with Reporter Narrative Template

How Do I…?	Selections	Tips & Guidelines
Access the CRM Report with Reporter Narrative template	• Select ***CRM Intake Report with Reporter Narrative*** from the **Options** drop down list. • Click **Go**. The report opens in MS Word.	*This report displays the Intake with the reporter information created in CRM* *The Intake Report with Reporter Narrative template is only accessible to those with the appropriate security.*

Access the Access the Web Report		
How Do I…?	**Selections**	**Tips & Guidelines**
Access the Web Report	• Select ***Web Report*** from the **Options** drop down list. • Click **Go**. The report opens in MS Word.	*The Web report displays for Child and Adult Intakes. It only display if the Intake type is Web.*

Access the Prior Intakes and Service Records Template		
How Do I…?	**Selections**	**Tips & Guidelines**
Access the Prior Intakes and Service Records template	• Select ***Prior Intakes and Service Records*** from the **Options** drop down list. • Click **Go**.	*The Prior Intakes and Service Records template launches with the completed information regarding the intake and is not editable.*

Create a Split Intake		
How Do I…?	**Selections**	**Tips & Guidelines**
Create a Split Intake	• Select ***Split Intake*** from the **Options** drop down of an existing **Intake**. • Click **Go**. • The **Split Intake** pop-up page displays. • The check boxes for all intake participants are pre-selected. • Click **Continue**. • The **FSFN Intake** page displays. • Click **Save**. • Click **Close**.	*The Split Intake option is available from all Intake sequences: initial, additional and supplemental.* *All information from the originating intake copies over to the new 'split' intake on creation of the new 'split' intake. For participant specific information, such as roles, the information from the originating intake copies to the new 'split' intake for those selected participants on the Split Intake pop-up page.* *The new 'split' intake goes through the standard Receiving Unit processing.*

Delink an Intake		
How Do I…?	**Selections**	**Tips & Guidelines**
Delink an Intake	• Select ***Delink Intake*** from the **Options** drop down list on the **Maintain Case** page. • Click **Go**. • The **Delink Intake** page displays. • Click the radio button for the appropriate intake to delink from the Case. • Click **Save**. • A validation message displays confirming the selected delink. • Click **Yes**. • Click **Close**. • The **Maintain Case** page displays. • Click **Close**.	*If a Service Referral or an Initial Intake links to the wrong Case, or if the Intake needs removal from the Case in order to break the relationship between the Service Referral or Intake and the Case, a user with the appropriate security can delink the intake from the case. If the investigation passes the creation of a commencement note, the use cannot delink the Intake from the case if the investigation has not gone past the creation of a commencement note.* *Following the delinking of an intake from a case, the Case remains on the desktop within the Cases expando, but the Intake is moved to the Intakes expando, of the user's desktop that performed the delink process.*

Perform an Intake Merge		
How Do I…?	**Selections**	**Tips & Guidelines**
Perform an Intake Merge	• Select ***Re-link*** from the **Options** drop down on the **Intake** page. • Click **Go**. • The **Re-link Intake** pop-up page displays. • Click the **Search** hyperlink to launch the **Case Search** page. • Perform a **Case Search.** • Click the appropriate **Case Folder**. • Click the **Intakes** icon and select the radio button for the **Initial Intake**, for which the existing intake should be a sequence to. • Select the appropriate radio button, indicating if the intake should be an **Additiona**l or **Supplemental Intake**. • Click **Save**. • Click **Close**. • The **Intake** page displays and the **Intake Number**, in **the Intake Information** group box displays the appropriate sequential number, as well as the appropriate sequence type of additional or supplemental. • Click **Save**.	*Upon employing the Merge Intake process, all information documented on the FSFN Intake page remains the same, except for the following:* *The Intake Number is no longer a 01 initial intake, but displays the appropriate numbering sequence for the selected initial intake on the Case Search page.* *The Intake Type displays the selected sequence type of additional or supplemental.* *The Allegations tab automatically updates to display both the 'Previous Allegations' and 'Allegations' group boxes in order to pull in all previous allegations, as the intake is nowa sequence. All new allegations, documented on the current intake, are displayed in the 'Allegations' group box.* *The system checks to determine if the intake already went through the CI Unit and/ or Receiving Unit processing, prior to delinking and re-linking. If the intake already went through the CI Unit and/ or Receiving Unit, the Hotline Supervisor or Authorized User, who performed the Merge Intake process, must manually assign the Intake to the appropriate Protective Investigator. If the intake has not already gone through the CI Unit and/ or Receiving Unit, the intake follows the standard process.* *A Merged Intake indicator displays in the Intake Information group box.*

Access the Receiving Unit List

How Do I…?	Selections	Tips & Guidelines
Access the Receiving Unit List	• From the **Menu** bar, click **Utilities.** • From the drop down list, select ***Receiving Unit List***. • From the subsequent list, select ***Adult Intakes***. • The **Receiving Unit List** page displays. • Select the appropriate county from the **County** drop down field to display all unassigned **Intakes** for that County's Receiving Unit. • Click the check box next to the appropriate **Intake**. • Click the **Search** hyperlink. • Enter **Search Criteria** in the **Last Name** field. • Click **Search**. • In the **Workers Returned** field, select the appropriate radio button for the appropriate **Worker**. • Click **Continue**. • The **Receiving Unit List** page displays. • Click **Assign**. • Click **Close**.	*The system separates the Child and Adult program types and displays them individually. Appropriate workers in the field view the 24-hour response Intakes assigned to their County by the Hotline using the Child and Adult Intakes options.* *If the worker accessing the Receiving Unit List page does not wish to assign the Intake to a specific worker, he/ she can accept the intake, thereby creating a self-assignment, by selecting the appropriate Intake check box, and clicking Accept.*