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Florida Safe Families Network

Person Book How Do I ... Guide

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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 additional resources.

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General Information

Person Book presents a summary of a specific person's information while providing you direct access via hyperlinks to many of the FSFN pages for viewing and updating information. Person Book provides information at the Person level across the FSFN system not bound by a FSFN Case. For example, Person Book lists any Intake processed across the entire FSFN system, including "Pending" Intakes that are saved to FSFN but not linked to a Case.

- Person Book displays in edit mode for updating data if it is accessed from your Desktop. If accessed from Search, it is in view-only mode.
- Person Book employs the same date restrictions used on the Desktop.
- Standard security is applied to the information on Person Book as to all data within FSFN. Your security
 profile works the same. If you do not have security to view Medical/Mental Health information, it is not
 accessible on Person Book.
- If you modify information or create a page, click the **Refresh** button on the Person Book. FSFN updates the Person Book with the most recent, up-to-date information and resets the default of the center drop down to Case Notes.
- If the person is a case participant in a restricted case, their Person Book is only available to users that have the security to access all restricted cases. The Person Book hyperlink does not display as a hyperlink, but as plain black text to all other users. Even if you are assigned to the restricted case but do not have all the restricted case security rights, you cannot view the Person Book. It is possible the person is involved with another restricted case. Because information from all cases the person is involved with displays on their Person Book, it is possible that the Person Book includes information from the other restricted case that you are not assigned.

Access Person	1 Book	
How Do I?	Selections	Tips & Guidelines
Access Person Book from Desktop	 From the Desktop, select the Participant View checkbox. Expand the Outliner to display Cases > Case Folder. Click the Person Book hyperlink for the appropriate case participant. 	Assignment to a case where the person is a participant is required to access Person Book from Desktop. Person Book accessed from Desktop displays in edit mode, including other pages accessed from Person Book. If the person is a participant in a restricted case, Person Book is not accessible from Desktop, even if you are assigned to the case. Only if you have security to access all restricted cases without needing an assignment is the Person Book available.
Access Person Book from Search	 From the Desktop, click Search on the banner. OR From the Utilities menu, click Search. Conduct search. Select the Participant View checkbox. In Cases Returned, expand the Outliner: Case. Click the Person Book hyperlink for the appropriate person. Person Tab: In the Persons Returned, click the Person Book hyperlink for appropriate person. 	Person Book accessed from Search displays in view only mode, including other pages accessed from Person Book. If the person is a participant in a restricted case, Person Book is not accessible from Search, even if you are assigned to the case.

Print from Person Book		
How Do I?	Selections	Tips & Guidelines
Print from Person Book	From the banner, click Print .	Can be used to print a person summary, Print includes information that is scrolled out of view.

Refresh Person Book		
How Do I?	Selections	Tips & Guidelines
Refresh Person Book	Click Refresh at bottom-right of the Person Book.	It is good practice to refresh occasionally, so the most recent, up-to-date information is displayed. It also resets the default option for the center drop down to Case Notes

Access Adoption Information		
How Do I?	Selections	Tips & Guidelines
Access Adoption Information	In the Adoption Information group box, click the Person Name-ID hyperlink.	Displays the Adoption Information page associated to the person, if created or updated within the last 24 months.
	Additional information: - Person Name and ID - Date Last Updated	NOTE: If any pieces of work older than 24 months exist, a "See more history" note will appear at the bottom of the center panel group box. To view these pieces of work, access the Desktop, uncheck the Date Restricted checkbox, and then access the page(s) from the Desktop Outliner. FSFN only permits one Adoption Subsidy Agreement for a person.

Access Adoption Information		
How Do I?	Selections	Tips & Guidelines
Access Adoption Subsidy Agreement Information	 In the Adoption Information group box, click the Adoption Subsidy Agreement hyperlink. 	Displays the Adoption Subsidy Agreement Information page associated to the person, if created or updated within the last 24 months.
	Additional information: - Person Name and ID - Date Last Updated	NOTE: If any pieces of work older than 24 months exist, a "See more history" note will appear at the bottom of the center panel group box. To view these pieces of work, access the Desktop, uncheck the Date Restricted checkbox, and then access the page(s) from the Desktop Outliner.
		FSFN only permits one Adoption Subsidy Agreement for a person.
Access information relevant to	 Above the center group box in the Work Type drop down, select Adoption. 	Displays the applicable page associated to the person, if created or updated within the last 24 months.
Adoption	 The Adoption hyperlinks display in the center group box. Click the Adoption Information, Adoption Subsidy Agreement, Adoption Photo – Child Web Ready, Adoption Photo – Child Not Web Ready, Adoption Photo – Sibling Group – Web Ready, Adoption Photo – Sibling Group – Not Web Ready, or Post 	If any pieces of work older than 24 months exist, a "See more history" note will appear at the bottom of the center panel group box. To view these pieces of work, access the Desktop, uncheck the Date Restricted checkbox, and then access the page(s) from the Desktop Outliner.
	 Adoption Services page hyperlink. The applicable page displays. View or edit information on the applicable page, as needed. 	FSFN only permits one Post Adoption Services page per person.

Access Assessments and Planning		
How Do I?	Selections	Tips & Guidelines
Access Assessments and Planning	 Above the center group box in the Work Type drop down, select Assessment and Planning. The Assessment and Planning hyperlinks display in the center group box. 	Assessment and Planning displays FFA – Investigation, Safety Plan (Investigation and Case level), PDA (Investigation and Case level), FFA - Ongoing, Case Plan Worksheets, Progress Updates, Judicial Review Worksheets and Risk Assessment
	Additional information displayed in the hyperlink OR in plain black text under each hyperlink:	created/updated within the last 24 months in order of newest to oldest based on the create date.
	Case ID Household Name Create Date Date Last Modified Completion Date Unique, system generated IDs for each piece of work displayed Click the FFA – Investigation, Safety Plan, PDA, FFA - Ongoing, Case Plan Worksheets, Progress Updates, Judicial Review, or Risk Assessment hyperlink. The applicable page displays. View or edit information on the applicable page, as needed.	Underneath the Safety Plan outliner, the worker will be able to see more detailed information which includes the Household Name, Effective Date and Termination Date.

Access Case Notes		
How Do I?	Selections	Tips & Guidelines
Access Case Notes	From the Work Type drop down, select Case Notes. In the center group box, click appropriate Case Notes Category hyperlink. Additional information: Case Notes Types Contact Begin Date and Time Case ID Date and Time Entered Narrative (first 200 characters)	Case Notes is the default display when Person Book is launched or refreshed. Displays Case Notes pages associated to the person across all FSFN Cases, if created or updated within the last three months. Case Notes associated to an Adult or Child Investigation or Special Conditions Referral displays under Investigations/Special Conditions Referrals. Sorts by Contact Begin Date (newest to oldest). Case Notes can only be modified or include an image uploaded by the creator or the supervisor and only if Person Book was accessed directly from Desktop and not through Search.
Access Case Notes View History	 From the Work Type drop down, select Case Notes. In the center group box, click the View History hyperlink. 	The hyperlink launches a Microsoft Word document with all the versions of the specific Case Notes.

Access Child Placement Agreement		
How Do I?	Selections	Tips & Guidelines
Access Child Placement Agreement	From the Work Type drop down, select Child Placement Agreement. In the center group box, click appropriate Child Placement Agreement page hyperlink. Additional information: Case ID Participant Name Most Recent Effective Date Terminate Date	Displays all existing Child Placement Agreement pages associated to the person across all FSFN cases, if created or updated within in the last 24 months. Upon clicking on the hyperlink, the Child Placement Agreement page will be launched in edit or view mode based on where the Person Book page was accessed from. Current, active Child Placement Agreement page will display first. If there are multiple terminated pages, then they will display newest t oldest based on the Effective Date of the first row inserted on the Child Placement Agreement page.

Access Education		
How Do I?	Selections	Tips & Guidelines
Access Education	In the Education group box, click the Education Record – Case ID hyperlink. Additional information: School Name Current Grade Date Last Updated	Displays all Education pages associated to the person across all FSFN Cases, if created or updated within the last six months. Sorts by Create Date (newest to oldest).

Access Eligibility Information		
How Do I?	Selections	Tips & Guidelines
Access Medicaid Eligibility Determination	From the Work Type drop down, select Eligibility. In center group box, click the Medicaid Eligibility Determination hyperlink. Additional information: Eligibility From Date Eligibility Review Date Child Name Case ID	Displays all Medicaid Eligibility Determination pages associated to the person across all FSFN Cases, if created or updated within the last 12 months. Sorts by Eligibility From Date (newest to oldest).
Access TANF Eligibility (Foster Care or Adoption)	From the Work Type drop down, select Eligibility. In the center group box, click the TANF-Eligibility or Adoption TANF-Eligibility hyperlink. Additional information: Eligibility From Date Child Name Case ID	Displays all TANF- Eligibility or Adoption pages associated to the person across all FSFN Cases, if created or updated within the last 12 months. Sorts by Eligibility From Date (newest to oldest).
Access Title IV-E Eligibility (Foster Care)	From the Work Type drop down, select Eligibility. In the center group box, click the Title IV-E Eligibility Determination hyperlink. Additional information: Eligibility From Date Eligibility Review Date Child Name Case ID	Displays all Title IV-E Eligibility Determination pages associated to the person across all FSFN Cases, if created or updated within the last 12 months. Sorts by Eligibility From Date (newest to oldest).

Access Eligibility Information		
How Do I?	Selections	Tips & Guidelines
Access Title IV-E Eligibility (Adoption)	 From the Work Type drop down, select Eligibility. In center group box, click the Adoption Eligibility Determination hyperlink. Additional information: Eligibility Effective From Date Eligibility Void or Termination Date (if applicable) Child Name Eligibility Status Case ID 	Displays all Adoption Eligibility Determination pages associated to the person across all FSFN Cases, if created or updated within the last 12 months. Sorts by Eligibility Effective From Date (newest to oldest).

Access File Cabinet (Images and Files)		
How Do I?	Selections	Tips & Guidelines
Access Images and Files	From the Work Type drop down, select File Cabinet. In the center group box, click the appropriate Image Category – Type – Case ID hyperlink. Additional information: File Name Date Document Scanned Associated Case Participants	Displays all Imaging pages associated to the person across all FSFN Cases, if created or updated within the last 12 months. Sorts by Date Document Scanned (newest to oldest). Medical Record images or files do not display. They display in the Medical/ Mental Health group box. Photo uploaded from Person Management does not display. It is available in the Person Information group box. Adoption Photos do not display on Person Book.

Access FSFN Cases		
How Do I?	Selections	Tips & Guidelines
Access Maintain Case	 In the Case Information group box, click the Case Name – ID hyperlink. Additional information: Case Type Case Open/Reopen Date Primary Assigned Worker County Case Address 	Displays all FSFN Cases, open or closed, where the person is a case participant. Case Name – ID hyperlink may contain additional information such as Restricted, Closure Status (Accepted or Denied), Case Split, Case Merge, Pre-Adoption, and Post-Adoption. Sorts by Case Name.

Access Legal Documents		
How Do I?	Selections	Tips & Guidelines
Access Legal	 Above the center group box in the Work Type drop down, select Legal. Click on the appropriate Legal Record hyperlink. View or edit information on the Legal Action page, as needed. Above the center group box in the Work Type drop down, select Legal. Click on the appropriate Legal Document Category – Type – Case ID hyperlink. View or edit information on the Legal Action page, as needed. Above the center group box in the Work Type drop down, select Diligent Search. Click on the appropriate Diligent Search hyperlink. View or edit information on the Legal Action page, as needed. 	Legal hyperlinks to Legal Case Work where the person is a case participant. This includes Legal Records, Legal Documentation pages, and Diligent Search for Parent pages.
	Additional information includes: - Create Date - Case ID	

Access Intakes		
How Do I?	Selections	Tips & Guidelines
Access Intakes	 From the Work Type drop down, select Intakes. In the center group box, click the Intake ID hyperlink. Additional information: Intake Name Intake Type and Subtype 	Displays Intakes, open or closed, where the person is a participant and the intake was received within the last 12 months. "Pending" Intakes, not linked to a Case, are included. Sorts by Date Received (newest to oldest). Security required for accessing "Special Handling" Intakes and any of the Intakes flagged as "Special Handling". Without
	Screening DecisionStatusCountyCase ID (if linked)	proper security, the Intake information displays as plain black text instead of a hyperlink.

How Do I?	Selections	Tips & Guidelines
Access Investigations or Special Conditions Referrals	From the Work Type drop down, select Investigations/Special Conditions Referrals. In the center group box, click the appropriate Investigation or Special Conditions Referral hyperlink. Additional information: Investigation Type and Subtype Status and Status Date Intake ID and Date/Time Received County Primary Protective Investigator Name and Unit Number and Name Move Investigation Indicator (M) Special Handling Indicator (if applicable) Most Serious Finding on Investigation: Verified, Not Substantiated, or No Indicator Case ID	Displays all Investigations (Child/Adult) and Special Conditions Referrals associated to the person, regardless of the FSFN Case, if created or updated within the last 24 months. Includes open or closed. Sorts by Intake Received Date (newest to oldest). Security required for accessing "Special Handling" Intakes and any of the Intakes flagged as "Special Handling". Without proper security, the Intake information displays as plain black text instead of a hyperlink.
Access information relevant to Investigation or Special Conditions Referral	 From the Work Type drop down, select Investigations/Special Conditions Referrals. Under appropriate Investigation or Special Conditions Referral, relevant work displays: FFA – Investigation, Safety Plan, PDA, FFA - Ongoing, Case Plan Worksheets, Progress Updates, Judicial Review, or Risk Assessment hyperlink. Click on the appropriate hyperlink to access. 	Displays all relevant work associated to the Investigation (Child/Adult) and Special Conditions Referrals associated to the person, if created or updated within the last 24 months. Information displays similar to Desktop Outliner. Underneath the Safety Plan outliner, the worker will be able to see more detailed information which includes the Household Name, Effective Date and Termination Date.

Access Medical/Mental Health		
How Do I?	Selections	Tips & Guidelines
Access Medical/ Mental Health	In the Medical/Mental Health group box, click the Medical Mental Health-Case ID hyperlink. View or edit information on the Medical/Mental Health page, as needed. Additional information: Indicator for Psychotropic Meds Indicator for Clinically Diagnosed Disability Date Last Updated	Security required to access Medical/Mental Health information. Displays all Medical/Mental Health pages associated to the person across all FSFN Cases, if created or updated within the last six months. Sorts by Date Created (newest to oldest).
Access Medical Records Images or Files	 In the Medical/Mental Health group box, click the Medical Record Type and Case ID hyperlink. On the Imaging page, click the View hyperlink. Additional information: Case ID File Name Date Document Scanned Associated Case Participants 	Security required to access Medical/Mental Health information. Displays all images or files associated to the person across all FSFN Cases, if created or updated within the last six months. Sorts by Date Document Scanned (newest to oldest).

Access Meetings		
How Do I?	Selections	Tips & Guidelines
Access Meetings	From the Work Type drop down, select Meetings. In the center group box, click the Meeting Type hyperlink. Additional information: Date Created Case ID	Displays all Meeting pages associated to the person across all FSFN Cases, if created or updated within the last 12 months. Sorts by Date Created (newest to oldest).

Access Person Information		
How Do I?	Selections	Tips & Guidelines
Access Person Management	In the Person Information group box, click the Person Name-ID hyperlink. Additional information: Date of Birth Age SSN Race Home and Cell Phone Numbers Current Address	Estimated Age displays if Date of Birth is not available.
Access Current Photo	In the Person Information group box, click the Current Photo hyperlink.	"No Photo" displays if no photos are attached to Person Management.
Access AFCARS Exception	In the Person Information group box, click the AFCARS Exception hyperlink.	AFCARS Exception hyperlink displays if generated during the previous night's processing.

Access Placements / Living Arrangement / Family Support / Private Adoption

How Do I?	Selections	Tips & Guidelines
Access Out-of- Home Placements	From the Work Type drop down, select Placements. In the center group box, click the appropriate Out-of-Home Placement hyperlink. Additional information: Service Category and Type Case ID Begin Date and End Date Provider Name Participant Name County of Worker who created Placement Approval/ Closed Status Removal/ Discharge indicator Ending Reason	Displays all Out-of-Home Placement pages associated to person across all FSFN Cases, including all "open" placements and those ended within the last 24 months. Groups and displays "open" first, then "ended". Sorts by Begin Date (newest to oldest).
Access Living Arrangements	From the Work Type drop down, select <i>Placements</i> . In the center group box, click the appropriate Living Arrangement hyperlink. Additional information: Case ID Begin Date End Date Living Arrangement Type Participant Name	Displays all Living Arrangements pages associated to person across all FSFN Cases, including all "open" and those ended within the last 24 months. Groups and displays "open" first, then "ended". Sorts by Begin Date (newest to oldest)

Access Placements / Living Arrangement / Family Support / Private Adoption

How Do I?	Selections	Tips & Guidelines
Access Family Support	From the Work Type drop down, select Placements. In the center group box, click the appropriate Family Support hyperlink. Additional information: Case ID Begin Date End Date Referral Type Participant Name Ending Reason	Displays all Family Support pages associated to person across all FSFN Cases, including all "open" and those ended within the last 24 months. Groups and displays "open" first, then "ended." Sorts by Begin Date (newest to oldest).
Access Private Adoption	From the Work Type drop down, select Placements. In the center group box, click the appropriate Private Adoption hyperlink. Additional information: Case ID Participant Name Agency Type Agency Name Status Adoption Outcome Adoption Finalization Date	Displays Private Adoption pages associated to case, including all "open" and those finalized within the last 24 months. Groups and displays "open" first, then finalized. Sorts Create Date (newest to oldest).

Access Scheduled Legal Actions		
How Do I?	Selections	Tips & Guidelines
Access Legal Records	In the Scheduled Legal Actions group box, click the appropriate Legal Actions-Case ID hyperlink.	Displays all Legal Records associated to the person across all FSFN Cases if there is a Scheduled Date and no Completed Date.
	 View or edit information on the Legal Action page, as needed. 	Sorts by Scheduled Date (soonest first).
	Additional information:	
	 Scheduled Date and Time 	
	 Person Name and ID 	
	- Date Last Updated	

Access Service Authorization			
How Do I?	Selections	Tips & Guidelines	
Access Services	 From Work Type drop down, select Services. In center group box, click Service Category – Type – Case ID hyperlink. View or edit information on the Services page, as needed. Additional information: Begin Date End Date (if applicable) Provider Name Participant Name Approval Status 	Displays all Service Authorization pages associated to person across all FSFN Cases, including all "open" and those ended within the last 24 months. Groups and displays "open" first, the "ended." Sorts by Begin Date (newest to oldest).	

Access Services			
How Do I?	Selections	Tips & Guidelines	
Access Services	 From Work Type drop down, select Services. In center group box, click appropriate Services Category – Type – Case ID hyperlink. View or edit information on the Access Services page, as needed. Additional information: Begin Date End Date Provider Participant Name Approval Status 	Displays all Services pages associated to person across all FSFN Cases, including all "open" and those ended within the last 24 months. Groups and displays "open" first, the "ended." Sorts by Begin Date (newest to oldest).	