



Florida Safe Families Network

Substance Abuse Medical Health (SAMH) How Do I ... Guide

June 27, 2013

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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Create SAMH Case Notes

How Do I...?	Selections	Tips & Guidelines
<p>Create a SAMH Case Note page from Desktop</p>	<ul style="list-style-type: none"> • From Desktop, click Case Work on Banner. • On Create Case Work page, select Substance Abuse Mental Health (SAMH) from Narrative drop down. • In Cases group box, select case. • In Case Participants group box, select participant(s). • Click Create. • On Case Notes page, enter Contact Begin Date/Time. • From Type group box, select Substance Abuse Mental Health (SAMH) check box. • In Participants group box, select appropriate Applies To check box(es). • In Substance Abuse Mental Health (SAMH) group box, select appropriate radio button to indicate progress. • In Narrative field, enter text. • Enter other data as needed. • Click Save. • Click Close. 	<p><i>Security required for creating SAMH Case Notes.</i></p> <p><i>Create SAMH Case Notes three (3) ways from Desktop:</i></p> <ul style="list-style-type: none"> • <i>Click Case Work on Desktop Banner</i> • <i>Click Create > Case Work menu on Desktop</i> • <i>Click Actions hyperlink next to a Case or Participant, select Create Case Note on Actions pop-up page</i> <p><i>Hold down 'Ctrl' key to select multiple participants.</i></p> <p><i>If "Not Adequate" or "No Progress" is selected for Progress, upon saving the Case Notes page successfully, an automated message (email) is sent to most recently assigned Primary Worker. Message states the following: "A Substance Abuse Mental Health (SAMH) Case Note has been documented as 'Not Adequate' or 'No Progress' for Case ID: XXXXXXXX to which you are currently assigned as the Primary. Please review the Case Note to determine next steps'. Email is sent every time the Case Notes is saved and the progress is Not Adequate or No Progress.</i></p>



Create SAMH Case Notes

How Do I...?	Selections	Tips & Guidelines
<p>Create a SAMH Case Note page from Case Book</p>	<ul style="list-style-type: none"> • On Case Book, from Case Actions List Box, click Case Notes hyperlink. • On Case Notes page, enter Contact Begin Date/Time. • From Category drop down, select Substance Abuse Mental Health (SAMH). • From Type group box, select Substance Abuse Mental Health (SAMH) check box. • In Participants group box, select appropriate Applies To check box(es). • In Substance Abuse Mental Health (SAMH) group box, select appropriate radio button to indicate progress. • In Narrative field, enter text. • Enter other data as needed. • Click Save. • Click Close. 	<p><i>You can also click the Create Case Work hyperlink at the top-center of Case Book to create a SAMH Case Notes page.</i></p> <p><i>SAMH Case Notes cannot be created from Case Book if it is launched from Search.</i></p> <p><i>Only the worker who creates the SAMH Case Note or the supervisor of the worker who created the SAMH Case Note can update a Case Note.</i></p>



Create SAMH Case Notes

How Do I...?	Selections	Tips & Guidelines
<p>Create a SAMH Case Note page from Search (Utility)</p>	<ul style="list-style-type: none"> • From Desktop, click Search on Banner. • Conduct search on Case, Person, or Worker tabs. • Click Actions hyperlink next to Case in search results. • On Actions pop-up page, select Create Case Notes check box. • Click Continue. • From Category drop down, select Substance Abuse Mental Health (SAMH). • From Type group box, select Substance Abuse Mental Health (SAMH) check box. • In Participants group box, select appropriate Applies To check box(es). • In Substance Abuse Mental Health (SAMH) group box, select appropriate radio button to indicate progress. • In Narrative field, enter text. • Enter other data as needed. • Click Save. • Click Close. 	<p><i>SAMH Case Notes can be created for 'open' and 'closed' Cases from Search.</i></p> <p><i>SAMH Case Notes cannot be edited (including by the creator) when created from Search.</i></p> <p><i>Security is required to select Substance Abuse Mental Health (SAMH) category.</i></p>



Access SAMH Case Notes

How Do I...?	Selections	Tips & Guidelines
<p>Access a SAMH Case Note from the Desktop or Search</p>	<ul style="list-style-type: none"> From Desktop or Search page, expand Outliner to display Cases > Narratives. Click appropriate Substance Abuse Mental Health (SAMH) hyperlink. 	<p><i>You can access a SAMH Case Note from Desktop, Case Book, Person Book, and Utility Search.</i></p> <p><i>Only the worker who creates the SAMH Case Note or the supervisor of the worker who created the SAMH Case Note can update a SAMH Case Note.</i></p> <p><i>SAMH Case Notes cannot be edited if launched from Search.</i></p>
<p>Access a SAMH Case Note from Case Book or Person Book</p>	<ul style="list-style-type: none"> On Case Book or Person Book, select Case Notes for work type on center group box. SAMH Case Notes display in center group box of Case Book page. Click appropriate Substance Abuse Mental Health (SAMH) hyperlink. 	<p><i>Case Book displays SAMH Case Notes associated to specific case. Person Book displays SAMH Case Notes associated to person cross all FSFN Cases, open or closed.</i></p> <p><i>Only SAMH Case Notes created or updated within the last 3 months display.</i></p> <p><i>Sorted by Contact Begin Date</i></p>



Search for a SAMH Case Notes

How Do I...?	Selections	Tips & Guidelines
<p>Search for a SAMH Case Note from Desktop, Search, or Case Book</p>	<ul style="list-style-type: none"> • From the Desktop or Search, expand Cases expando. • Click Actions hyperlink; Actions pop-up displays. • Select Case Notes Search Criteria radio button. • Click Continue. <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> • Click Case Notes Search Criteria hyperlink at the top-center of Case Book. • On Case Note Search Criteria page, select start and end dates. • In Category and Type Criteria Group Box, select Substance Abuse Mental Health (SAMH). • Click Add to move Substance Abuse Mental Health (SAMH) to Selected Categories List Box. • Select a specific participant in Case Participants group box. • Click Search. • The Case Notes Search Results Page returns SAMH Case Notes per your selected search criteria. • Click View hyperlink to view note. • Click Print hyperlink to print note. • Select View All Notes in Options drop down. • Click Go. • All SAMH Case Notes in search results display. • Click Close. 	<p><i>Notes cannot be edited from Case Notes Search Criteria.</i></p> <p><i>Start Date defaults to 60 days prior to the current date. End Date defaults to the current date. Both fields are user modifiable.</i></p>



View current SAMH Case Notes or History (all versions)

How Do I...?	Selections	Tips & Guidelines
View current SAMH Case Notes from Case Notes page	<ul style="list-style-type: none"> • Access Case Notes page for Substance Abuse Mental Health (SAMH). • Click View Note hyperlink in Actions List Box. • Microsoft Word document opens current version of SAMH Case Notes. 	<p><i>Editing the Microsoft Word document does not update the FSFN Case Notes page.</i></p>
View SAMH Case Notes History from Case Notes page	<ul style="list-style-type: none"> • Access Case Notes page for Substance Abuse Mental Health (SAMH). • Click View History hyperlink in Actions List Box. • Microsoft Word document opens with all versions of the SAMH Case Notes, Chronological Notes Report, sorted by versions, starting with first version. 	<p><i>A versioned history of a note is available by selecting the View History Hyperlink on the Case Book page. A 'Version Number' field is displayed within the Case Note header group box, which indicates to the user if there are additional, historical versions of current note.</i></p>
View SAMH Case Notes History from Case Book	<ul style="list-style-type: none"> • On Case Book or Person Book, select Case Notes for work type on center group box. • SAMH Case Notes display in the center panel of Case Book page. • Click appropriate View History hyperlink. 	<p><i>Case Book displays SAMH Case Notes associated to specific case. Person Book displays SAMH Case Notes associated to person across all FSFN Cases, open or closed.</i></p> <p><i>Only SAMH Case Notes created or updated within the last 3 months display.</i></p> <p><i>Sorted by Contact Begin Date</i></p>



Upload an Image (file) to a SAMH Case Note

How Do I...?	Selections	Tips & Guidelines
Upload an Image	<ul style="list-style-type: none"> • After first successful save of SAMH Case Notes page, click Upload Image hyperlink in Actions List Box. • On Imaging page, enter Date Document Scanned in Image Details group box. • From Image Type drop down, select type. • Click Browse. • Locate and select file to upload from Windows Explorer page. • Click Open. • Selected file displays in File Name. • In Comments field, enter description (up to 500 characters). • Click Save. • Click Close. • The Case Notes page displays and View Attached Images hyperlink displays in the Actions List Box. 	<p><i>The Upload Image hyperlink only displays once the SAMH Case Notes page is saved successfully for the first time.</i></p> <p><i>You can upload multiple Images to a single SAMH Case Notes page.</i></p> <p><i>Each time the Upload Image hyperlink is clicked, a new Image is uploaded and attached to SAMH Case Notes page.</i></p> <p><i>When an Image is uploaded to the SAMH Case Notes page, both the Image Category and Image Type fields default to "Case Notes" and are disabled.</i></p> <p><i>Acceptable file formats .bmp, .jpg, .jpeg, .rtf, .doc, .xls, and .pdf.</i></p> <p><i>File name must be less than 50 characters. File size restricted to 25 MB.</i></p> <p>Important: <i>Check information before saving. You cannot edit after save.</i></p>



View an Attached Image (file) to SAMH Case Note

How Do I...?	Selections	Tips & Guidelines
View Attached Image	<ul style="list-style-type: none"> • Access SAMH Case Notes page. • If images are attached, View Attached Images hyperlink displays in Actions List Box. • Click View Attached Images hyperlink. • All images or files attached to SAMH Case Notes page display on Image History page with a View hyperlink for each image or file. • Click applicable View hyperlink. • On Imaging page, click View hyperlink to open image or file. • Image or file displays in compatible application (e.g., Microsoft Word or Browser). 	<p><i>The View Attached Images hyperlink displays only after at least one (1) Imaging page has been created in association with the SAMH Case Notes page.</i></p> <p><i>Imaging page cannot be edited from View Attached Images page.</i></p>

