Florida Safe Families Network

Maintain Case
User Guide

November 22, 2019

Prepared for
State of Florida Department of Children and Families
# Change History

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About FSFN User Guide

The Florida Safe Families Network (FSFN) User Guides helps you understand the steps to complete your work in the FSFN system. This user guide does not cover every system feature built into FSFN but describes the most commonly used functions to complete your day-to-day work in the FSFN application. This user guide, when used with Online Help and the How Do I Guides, helps you successfully use the FSFN system as a support tool in your important work of safeguarding the safety, permanence, and well-being of the children, families, and adults of Florida.

The Intended Audience

This user guide serves a wide audience of FSFN end users who include:

- Adult and Child Protective Investigators
- Financial Workers
- Hotline Command Center Counselors
- Legal Workers
- Ongoing Case Managers
- Provider Management
- Security Officers/Administrators
- Supervisors
- Support and Data Entry Staff

Prerequisite Knowledge

This user guide was developed with specific prerequisite expectations. Before reading this guide, read the following information. If you need to refer to additional User Guides, How Do I Guides, or other information, visit the DCF FSFN Website (http://fsfn.dcf.state.fl.us).

- You must have a working understanding of Florida Department of Children and Families Policies and Practices as related to the use and operation of FSFN.

- The Search page referred to within this user guide is the Search page with four (4) Tabs: Person, Case, Provider/Organization, and Worker. This Search page is commonly called the Utility Search or Navigational Search. It is accessed primarily from the Desktop by clicking Search on the Banner or Utilities menu. Other search types may be referred to as data retrieval searches. These searches use different search functionality than the Utility Search. For example, the Person Search page provides a method to search for a person and retrieve person data that pre-fills into the page in which you are working. The Person Search page should not be confused with the Search page with the Person Tab.
Related Resources
Visit the DCF FSFN Website (http://fsfn.dcf.state.fl.us) for online access to additional resources that support FSFN end users, including:

- FSFN Project Information
- Online Web-based Training (WBT)
- User Guides
- How Do I…Guides (Job Aids)
- Topic Papers (System Functionality Design)
- Reference Data (values in drop downs)

Security Information
FSFN restricts your ability to create, modify, and view specific information through the security profile associated with the Login Profile you used to access FSFN. Specific security is applied across all information. For example, if you do not have authorization to access restricted cases without an assignment, FSFN restricts your access.

⚠️ If there is special security necessary for a task described in this User Guide, it will be identified.
Maintain Case

About the Maintain Case Page

The Maintain Case page provides you with a high-level view of a new or existing case for a family. This page consists of a Header and five (5) Tabs.

Upon case creation, the Case Name fields pre-fill with information from a Child/Adult Intake, Special Conditions Intake, or Service Referral. The Open Date field defaults to the current date. If the Referral or Intake is linked to an existing open case or a case is retrieved in maintain mode, the Case Name fields pre-fill with the original family name and open date as retrieved from the Case table. The Tabs on the Maintain Case page are:

- **Participants** Tab – used to reactivate, deactivate, or remove a case participant
- **Relationship** Tab – used to define the relationship of one case participant to another
- **Address** Tab – used to maintain the primary address for the case
- **Professional/Other Contacts** Tab – used to maintain and update names and phone numbers of contacts
- **Closing History** Tab – used to view closed and/or merged history of a case

All created or linked cases must first be saved before maintenance can be performed. All family cases in FSFN originate from an Intake. Upon case creation, the Status radio buttons default to Open.

The Status of the case changes to Closed upon supervisory approval of a case closure request. A closed case can only be reopened once a screened-in Child/Adult/Special Conditions Intake, or Service Referral, has been linked to it. Therefore, if an Intake or Service Referral is linked to an existing case, the Status retrieved from the Case table is either Open (for a case that is currently open) or Reopen (for a case that was closed prior to the newlink).

Key Tasks

**To view the Maintain Case page**

1. From the Banner Bar, click **Search** to locate the family.
2. Click the **Case** hyperlink.
3. The **Maintain Case** page displays.

OR

1. From the Desktop, click the **Cases** expando.
2. Click the **Case** hyperlink.
3. The **Maintain Case** page displays.
To update Case Information

1. From the Desktop, click the Cases expando; your assigned workload displays.
2. Click the Case icon.
3. Click the Case hyperlink.
4. From the Maintain Case page, use the Participants Tab to update information regarding the case and participants using the various group boxes:
   - Case group box – header information defaults to the existing family case information and displays basic identifying information about the family. Upon case creation, the Case Name fields pre-fill with information from the Child/Adult/Special Conditions Intake or Service Referral. The Name fields are editable from this page. The Open Date field defaults to the current date and is not editable.
   - Basic group box – includes Description fields with drop down options for Case Type, Family Structure, and County. There is also a Restricted Case checkbox to indicate that the case is restricted, if applicable.
Participants group box – in maintain mode, a hyperlink is available to deactivate or remove a participant. The Participant Name hyperlink takes you to the participant’s Person Management page. The Person Management page allows you to document basic information about the case participant, such as date of birth, gender, and address. You may add participant(s) to a case in create and maintain modes by clicking the Insert button to access the Search Person page. Additional person(s) selected through Search are added to the Participant group box and saved to the Person and Case Participant pages.

5. Click **Save**.

6. Click **Close**.
The Participants Tab

About the Participants Tab
The Participants Tab maintains information about the people who are the subjects of a case. Use this Tab to:

- Update Case Information (Header/Basic Header)
- Reactivate, Deactivate, or Remove a case participant
- Access the Person Management page
- Add case participant(s) to a case

The basic person information for each Participant pre-fills from the Intake. Upon case creation, participants from a Child/Adult/Special Conditions Intake, or Service Referral, become case participants. In addition to displaying information about case participants, this Tab allows you to select the type of case and family structure for that case. All of this information may be entered in create mode and updated later.

Key Tasks

To update Case Information
1. From the Desktop, click the Cases expando; your assigned workload displays.
2. Click the Case icon.
3. Click the Case hyperlink.
4. From the Maintain Case page, use the Participants Tab to update information regarding the case and participants using the various group boxes:
   - **Case group box** – header information defaults to the existing family case information and displays basic identifying information about the family. Upon case creation, the Case Name fields pre-fill with information from the Child/Adult/Special Conditions Intake or Service Referral. The Name fields are editable from this page. The Open Date field defaults to the current date and is not editable.
   - **Basic group box** – includes Description fields with drop down options for Case Type, Family Structure, and County. There is also a Restricted Case check box to indicate that the case is restricted, if applicable. The Case Type drop down located on the Maintain Case page will display as In-Home Non-Judicial and Out-of-Home Non-Judicial instead of the existing values of In-Home Voluntary and Out-of-Home Voluntary. Therefore, all pre-existing FSFN Maintain Case pages where the In-Home Voluntary and Out-of-Home Voluntary were selected will automatically reflect the new language upon implementation.
   - **Participants group box** – displays in maintain mode, a hyperlink is available to
deactivate or remove a participant. The Participant Name hyperlink takes you to the participants **Person Management** page. The **Person Management** page allows you to document basic information about the case participant, such as date of birth, gender and address. You may add participant(s) to a case in create and maintain modes by clicking the **Insert** button to access the **Search Person** page. Additional person(s) selected through **Search** are added to the Participant group box and saved to the **Person** and **Case Participant** pages. If a participant is flagged in the database as “pre-adoptive”, then the participant will not be returned as a selection in the Persons Returned group box.

5. Click **Save**.

6. Click **Close**.

![Image of Person Management page](image)

**To add a Case Participant**

1. From the Desktop, click the **Cases** expando; your assigned workload displays.
2. Click the **Case** icon.
3. Click the **Case** hyperlink.
4. Within the **Participants Tab**’s **Participants** group box, click **Insert**.
5. The **Search Person** page displays. Examine the returned person records.
6. After verifying the person does not already exist, click **Create**.
7. The **Person Management** page displays the Basic Tab open.

![Person Management Page](image)

**Note:** If the person already exists in FSFN, click Select next to that person’s name in the Persons Returned group box, and then click Continue. If a participant is flagged in the database as “pre-adoptive”, then participant will not be returned as a selection in the Persons Returned group box.

If the person you want to create is identified to have a duplicate SSN, the **Potential Person Match** page opens. You must view every duplicate SSN before you can allow the duplicate SSN and continue with adding the person to the case. Once viewed, the person’s record displays the **Viewed** icon with a check mark. After the duplicate records have been viewed the **Allow Duplicate SSN** button is enabled.

8. On the **Person Management** page, enter basic information in the appropriate fields to add the new participant. Note that **AFCARS** fields are required and are denoted in red.
9. If the person has a duplicate SSN number, then a **Duplicate SSN** hyperlink displays next to the **SSN** field. Selecting the hyperlink displays possible duplicates. At this point, you can merge the person.
**To Merge Potential Person Match**

If you create a new participant and the participant's information already exists in FSFN, the Potential Person Match page displays.

1. From the **Person Search Persons Returned** results, click the **Merge** hyperlink next to the duplicate's name.
2. Click **Merge**.
3. The **Person Merge** page displays with relevant information for each participant.

4. Review the data and select the **Retain** radio button for the participant you want to keep in FSFN.
5. Select the **Remove** radio button for the participant you want to merge with your retained participant.
6. Click **Merge**.
7. The Merge record is complete and the **Maintain Case** page displays.
To remove a Case Participant

1. Within the Participants Tab's Participants group box, click the Remove hyperlink.

   **Note:** The Remove hyperlink appears only for users with the appropriate security, such as a supervisor or above.

   **Note:** Supervisors can remove participants who are incorrectly included in a case. If there is open work associated with the designated participant, an exception report is generated, and the removal is denied.

   **Note:** Most participant removals occur as a result of a worker making contact with case members, such as completing a home visit, and discovering that information from the initial Intake was incorrect.

   **Note:** If the person you are trying to remove is “Unknown, Unknown” then FSFN displays a validation message. The worker is prompted to navigate to the Person Management page and evaluate whether or not they can merge the unknown person into an existing person.

2. Click Yes to confirm removal.

   **Note:** Notice that the row for the participant displays with Reactivate and Deactivate hyperlinks, rather than the Deactivate and Remove hyperlinks that appear for active case participants.

3. Click Save.

4. Click Close.

To complete the Milestone Events List

1. Click Milestones hyperlink.
2. Click **Save and Return to FSFN**.

3. You return to the **Maintain Case** page.
The Relationships Tab

About the Relationships Tab
The Relationships Tab describes the relationship of one case participant to another. Upon case creation, the relationships defined in the Child/Adult/Special Conditions Intake or Service Referral are carried over to the Relationships Tab on the Maintain Case page. If an Intake or Referral is linked to an existing case, new relationship rows are brought over, but existing relationship rows are not overwritten. This is because during Intake, the relationships reported to the Hotline worker may not be as accurate as the information gathered by investigators and ongoing caseworkers throughout the life of the case.

Note You cannot select the same Subject on the left and the right. In addition, rules are in place to prevent you from selecting a set of subjects for whom a relationship is already defined.

Note A Delete hyperlink appears to the right of each relationship row.

Key Tasks

To add a Participant Relationship
1. From the Relationships Tab’s Relationship group box, click Insert. A new relationship row displays; all three blue fields are required.
2. Enter appropriate selections in each drop-down field to define the relationship between the case participant and the Subject(s).

Note The same Subject cannot be entered on the left and the right.
3. Click Save.
4. Click Close.
To delete a Participant Relationship

1. From the Relationships Tab, click the Delete hyperlink on the row you wish to remove.
2. A validation message displays; click Yes to continue, or No to cancel the action.
3. Click Save.
4. Click Close.
To modify a Participant Relationship

1. From the **Relationships** Tab, you can modify or update the participants’ relationships by choosing a different selection from the **Relationship** drop down.

2. Click **Save**.

3. Click **Close**.
The Address Tab

About the Address Tab
The Address Tab maintains the most current address for a Case. Upon case creation, the fields on the Address Tab pre-fill with the address information from the Child/Adult/Special Conditions Intake or Service Referral. When an Intake or Service Referral is linked to an existing case, the Intake/Referral address does not overwrite the existing Case address. Update mode allows you to replace the Case address with the Intake/Referral address if the latter is verified as correct during the course of the Investigation or ongoing casework activity. Upon case creation, or when linking an Intake/Referral to an existing Case, the Update button is disabled. When there is no information entered in the address fields on the address tab, the user cannot click the update button, select people, and click save to enter a blank address record.

The Effective Date of an address change must be either the current date, or a past date. A Pop-up message advises you that "The Effective Date cannot be a Future Date" if a future date is entered in the Effective Date field. If a Case address is updated for case participants, the Effective Date on the Address Tab pre-fills with the entry date.

Key Tasks

To update a Case Address
1. From the Desktop, click the Cases expando; your assigned workload displays.
2. Click the Case icon.
3. Click the Case hyperlink.
4. From the Maintain Case page, select the Address Tab.
5. Update the appropriate fields:
   - Use the Case Address group box to update case address information.
   - Use the Phone group box to update contact phone and e-mail information.
   - Use the Comment field to type a short description such as the type of neighborhood, household conditions, or special phone-related circumstances (neighbor’s phone, sister’s apartment).
6. Click Update.
7. The Update Address pop-up page displays.
8. Select the appropriate check box.
9. Click **Save**.
10. Click **Close**.
The Professional/Family Support Network Contacts Tab

About the Professional/Family Support Network Contacts Tab

The Professional/Family Support Network Contacts Tab allows the user to view and maintain Contacts. There are two types of case contacts:

- **Professional Contacts** – Because interactions with many Professional Contacts may occur frequently, they are created as persons in FSFN. This allows FSFN to pre-fill documents with their information, which minimizes duplicate data entry of Professional Contacts included in multiple cases. Examples of Professional Contacts include attorneys, health care providers, members of law enforcement, Child Protection Team (CPT) staff, teachers, and guidance counselors.

- **Family Support Network Contacts** – The Family Support Network Contacts group box functions similar to a free-form notepad. FSFN does not validate information entered in this group box and there is no search process required prior to entering this information. Users may add contacts freely. Users are unable to delete Family Support Network Contacts if the contact has been inserted in a FFA – Ongoing, Progress Update, Case Plan Worksheet, Judicial Review Worksheet or Young Adult Case Plan Worksheet. The user must first remove the contact from the FFA – Ongoing, Progress Update, Case Plan Worksheet, Judicial Review Worksheet and Young Adult Case Plan Worksheet then from Maintain Case.

To add a Professional Contact

1. From the Desktop, click the Cases expando; your assigned workload displays.
2. Click the Case icon.
3. Click the Case hyperlink.
4. From the Professional/Family Support Network Contacts Tab Professional group box, click Search.
5. The Search Person page displays.
6. Enter the search criteria and click Search.

*Note:* When FSFN locates a person, whose information is similar to or the same as the one you enter as Search Criteria, the information associated with that person is automatically returned to the Professional Contacts group box.

7. Click Select.
8. Click Continue.
9. The Professional/Family Support Network Contacts Tab displays the selected person.
10. From the Role drop down, select the appropriate role for the contact.
If FSFN does not locate a person whose information is similar to or the same as the one you enter as Search Criteria, click the Create button to create him or her as a person in FSFN. Enter the applicable person information, and then click Continue. The person displays on the Professional/Family Support Network Contacts Tab. Select the appropriate role for the contact from the Role drop down.
To add a Family Support Network Contacts

1. From the **Professional/Family Support Network Contacts** Tab’s **Family Support Network Contacts** group box, click **Insert**; this creates a blank row in the group box.

2. Enter information in the fields as appropriate. FSFN does not validate information entered here, and the Search process is not required as it is with a Professional Contact.

To delete a Contact

1. On the **Professional/Family Support Network Contacts** Tab, click the **Delete** hyperlink on the specific record you wish to delete.

2. The Delete hyperlink deletes the selected row.

3. The **Delete** hyperlink does not display until the creation of a Professional Contacts or Other Contacts row.

**Note** You can use the Delete hyperlink to delete a record from the Professional Contacts or Family Support Network Contacts group box. This action does not require supervisory approval. Upon attempting to delete a Professional Contact from a case, if the Professional Contact is listed on an FFA-Ongoing, Progress Update, Case Plan Worksheet, Judicial Review Worksheet and/or Young Adult Case Plan Worksheet, the user will receive the following validation message: The selected Family Support Network Contact is included on FFA – Ongoing ID: < >; Progress Update ID: < >; Case Plan Worksheet ID: < >; Judicial Review Worksheet ID: < >; and Young Adult Case Plan Worksheet ID: < >. In order to delete the selected Family Support Network Contact, s/he must be removed from the identified piece(s) of work, if applicable.

**Note** The deletion of Family Support Network contacts removes his or her association with the case.
The Closing History Tab

About the Closing History Tab
The Case History group box contains a record for each case closure that has occurred throughout the life of the case. Each record displays the Open and Closed Dates and the reason for each closure.

The Merged Cases group box contains the Open Date, Merged Date, Former Case Number, and Reason associated with the Cases merged into this Case structure.

About the Case Closure Page
The Case Closure page documents case closure information and initiates all case closure activities. You can manage all case closing activities from this page. Three (3) group boxes display on the Case Closure page, and there is a fourth group box that must be accessed by clicking an expando:

- Basic Information
- Closing Information
- Closure Summary
- Case Closure Denial Messages
If FSFN detects any reason(s) to deny a case closure request (e.g., there is work associated with a case participant that must be closed or completed, or there are missing AFCARS data elements), this information is displayed by clicking on the expando to display the Closure Denial Message group box.

This information updates every time the case closure batch is run in FSFN (which occurs periodically throughout the day), until all the errors preventing closure are corrected.

This process is not affected by the closure request being set to “Not Approve,” which allows you to finalize the denied closure request and correct the work items specified by FSFN.

The Options drop down allows you to access the Case Closure Summary notification, the Case Closure Checklist, and a printable Case Closure Denial Messages report.

If a new Intake is linked to the case before the supervisor finalizes the case closure process, FSFN automatically changes the status of the request to “Not Approve.” If there is already a pending case closure request, a new Case Closure Request page cannot be created for the case.

**Key Tasks**

**To initiate Case Closure**

1. From the Desktop, click the **Cases** expando.
2. Click the **Case** icon.
3. Click the **Case** hyperlink.
4. From the **Closing History** Tab’s **Options** drop down, select **Submit Case Closure Request**.
5. The **Case Closure** page displays.
6. Within the **Closing Information** group box, select the **Request for Closure** checkbox.
7. Select the appropriate reason from the **Reason** drop down.
8. Enter other appropriate field information as applicable.
9. Enter text in the required **Closure Summary** narrative field.
10. Click **Save**.

**To complete Case Closure**

1. Wait for FSFN to run a case closure batch to ensure that the case is ready for closure (no open placements or services).
2. Once the batch is run and if no corrections are needed, the Case Closure Status is updated to Accepted.
3. From the **Options** drop down, select **Approvals**.
4. Approve the case for closure. Click **Save**.
Splitting a Case

About Splitting a Case
Upon selecting the Continue button on the Split Case Participant Selection pop-up page and saving the new Maintain Case page, the participant(s) becomes de-activated in the original case.

The Family Structure in the new case will always default to ‘Unable to Determine.’ Case Name, Legal Status, Service Roles, County, and Case Type pre-fill in the new case from the original case. All the remaining fields in the new case will remain blank until/unless the worker updates them.

The address in the new case defaults to the case address from the original case and displays on the address Tab as the Primary. The user can create a new address in the new case to update it, and the pre-filled address becomes historical. The new, split case will have a Split Case designation in the Maintain Case page header.

Upon selecting Continue, and subsequently saving the newly created case, the system will automatically transpose the narrative, documenting the reason for the case split, into a case note. The Case Note type becomes Case Split, the narrative is captured on the Split Case Participant Selection page and has a Start Time of the successful savetime.

Note that upon performing Case Split, regardless that the Post Adoption Services page is based on Person ID, the page will remain with the original information. This is because the Post Adoption Services page, once created and saved to the database, is accessible from any and all cases in which the person is a Case Participant. Therefore, upon performing Case Split and placing the person in a new Split Case, the user will have the ability to drill down on the Desktop or access Case Book or Person Book from the Desktop and view the Post Adoption Services page from the center panel when selecting Adoption from the drop down.

Key tasks

To split a Case

1. From the Options menu of an existing Maintain Case page, select Split Case.

   Note: Case must contain more than one active participant.

2. Click Go.

3. The Split Case Participant Selection pop-up page displays.
4. Within the Case Participants group box, all active participants default to selected.
5. Uncheck participants as appropriate.
6. Enter text in the Explanation for Case Split text field.
7. Click Continue.
8. A new Maintain Case page displays with selected participants displayed on Participants Tab in Participants group box.
9. Click Save.
10. Click Close.
Delinking an Intake

About Delinking an Intake

The Delink Intake selection allows a user with the proper security to break the relationship between the Service Referral or Intake and the Case. You can delink an Intake if a Service Referral or an Initial Intake (that is, Child Intake, Adult Intake, or Special Conditions Intake) is linked to the wrong Case or if the intake needs to be removed from the Case in order to make an approved change to the frozen intake.

The Delink Intake page launches from the Maintain Case page by selecting Delink Intake from the Options drop down.

If you have the appropriate security to access the Delink Intake option, the Delink Intake pop-up page displays. Only authorized users have security rights to delink an Intake.

Additional and Supplemental intakes do not display on this page. Supplemental and Additional Intakes are not retrieved to this page but are assumed a part of their associated Initial Intake. If an Initial Intake is delinked, all attached Additional or Supplemental intakes automatically and simultaneously delink as well and appear with the delinked intake under your My Intakes expando.

Key Tasks

To delink an Intake

1. From the Desktop, click the Cases expando.
2. Click the Case hyperlink.
3. The Maintain Case page displays.
4. From the Options drop down, select Delink Intake.
5. Click Go.
6. The Delink Intake page displays.
7. Select the Intake radio button to delink the Intake from the case.
8. Click Save.
9. Click Close.
To determine whether the intake is eligible for delinking, FSFN invokes the following online edits:

- When delinking a Service Referral, there must be at least one additional Service Referral linked to the Case. FSFN does not allow you to delink the last remaining Service Referral on a Case.
- Any work completed on the Investigation beyond the initial commencement process or creation of other notes, precludes the ability to delink the intake from the Case. Due to the integral relationship of the Intake to the Investigation, an Intake (Child Intake, Adult Intake, or Special Conditions Intake) currently linked to an Investigation that has progressed beyond the initial commencement can no longer be delinked and the action is prevented.
- Unlike the rule preventing the delink of the last remaining Service Referral, the last remaining Child Intake, Adult Intake, or Special Conditions Intake is allowed as long as the Investigation attached to the Intake has not progressed beyond the initial commencement or creation of other notes.
- If the Investigation shell, the commencement, or other note(s) have been created, but no additional work on the Investigation exists, the Intake may still be delinked. However, when delinking at this point, the Investigative shell and any associated commencement or other note(s) are deleted and must be re-entered when the intake is again relinked to the correct case.
Merge Case

About Merging Cases

In FSFN, you can merge an open case to a closed case OR an open case to an open case.

If the same participant exists in both cases and has a Trust Account in both cases, the cases cannot be merged.

Note that upon performing Case Merge when one or both cases have a Post Adoption Services page, the Post Adoption Services page will not be modified. Because the Post Adoption Services page is by Person ID across the FSFN application, the system will not have to make any modifications to the page itself with respect to the Case ID and Case Name, as it is simply always the original Case in which it was initially created. However, even if the Post Adoption Services page was created initially in a Case that is now closed, the user is able to access that page from any other FSFN Case in which that participant is a Case Participant and will have the ability to edit it from that FSFN Case using Desktop, Case Book or Person Book (when accessed from the Desktop).

Once the batch has accepted the Case Closure and Supervisor Approval occurs, the system automatically transposes the narrative documented in the “Closure Summary” text field into a case note. The Case Note is given a note type of “Case Merge,” contains the narrative captured in the “Closure Summary” on the Case Closure page and has a “Start Time” of whenever the supervisor approval occurred.

In addition, once the batch has accepted the Case Closure and Supervisor Approval occurs, the following five pieces of work will be accessible from within a “Merged Case” folder icon displayed within the “kept” case: Medical/ Mental Health; Education; Interim Child Information; Legal Record; and Independent Living. All other pieces of work display within the “kept” case.

Note: Cases with the Case Type of Post Adoption Services cannot be merged.

Key Tasks

To Merge Cases

1. From the Options drop down on the Closing History Tab, of an existing, closed case, select Merge Case.
2. Click Go.
3. The Case Closure page displays.
4. From the Reason drop down, select Merge.
5. A Merge hyperlink displays to the right of the Reason drop down.
6. Enter text in the Closure Summary text field.
7. Select the Merge hyperlink.
8. The Case Search page displays.
9. Search and select a destination case, in which to merge to the existing case.
10. Click **Continue**.
11. The **Case Closure** page displays.
12. Click **Save**.
13. Click **Close**.
Create a New Case after Finalization

About Creating a New Case after Finalization

Access the Create New Case after Finalization pop-up page via the Options drop down on the Participants Tab of the Maintain Case page, in maintain mode.

The page displays all children who meet the following criteria:

- Have been deactivated for the reason of Adoption Finalization
- Placement was ended for the reason of Adoption Finalization
- If applicable, Private Adoption must be completed and non-voided
- Must have a Non-Waived, Non-Voided Title IV-E Foster Care Eligibility Determination
- Must have a Non-Terminated Adoption Subsidy Agreement Information page
- Must have a Non-Voided, Non-Terminated, IV-E Adoption Eligibility record that has been approved
- If a TANF exists for the child, it must be approved

The worker can choose to either place the child in an existing case or create a new case. This is to accommodate different situations. One situation is where a sibling was placed with the same Adoptive family, and the worker wishes to place this child with that same family. Another situation is if a Provider is adopting another child that is unrelated to a previously adopted child. FSFN allows the worker to search and select the existing FSFN Case since both children were discharged for Adoption Finalization/Privately Adopted for the same Provider. If there is not an existing case to place the child in, the user can select the Create button to create a new FSFN Post Adoption Services case.

NOTE: Only children that were in the same, most recent Out of Home Placement can be placed in the same Post Adoption Services case when performing the Create New Case after Finalization functionality.

NOTE: Once the Create New Case after Finalization process is completed, the child’s current FLORIDA PIN is copied over to the new Person Management record in FSFN. When the Medicaid Eligibility information is sent over through the FLORIDA Interface to Florida ACCESS, the CIC worker will update the FLORIDA Access database and will create a new PIN for the child. The new PIN will be sent back to FSFN from FLORIDA and will automatically display on the child’s new Person Management record. The previous FLORIDA PIN will be captured on the new Person Management record as the Previous FLORIDA PIN and the new FLORIDA PIN will be captured as the current FLORIDA PIN.

NOTE: If a child has unfinished transactions with the FLORIDA System they will not display on the Create New Case after Finalization pop-up page.
Also note that upon performing Create New Case after Finalization, the Post Adoption Services page will remain in the pre-adoptive FSFN Case and will NOT move or copy over to the Post Adoption FSFN Case. This is because the child will have a new Person ID and if Post Adoption Services are requested, the user will create a new Post Adoption Services page for that new Person ID.

Key Tasks

To create a New Case after Finalization

1. From the Options drop down on an existing case, select Create New Case after Finalization.
2. Click Go.
3. The Create New Case after Finalization pop-up page displays.

4. Select check box(es) for applicable child(ren).
5. Click the Search hyperlink to search and select a FSFN Case, if a Post Adoption Case already exists for the Provider adopting the current child. If there is not already an existing Post Adoption FSFN Case, click the Create button.
6. The Case Search page displays.
7. Enter search criteria.
8. Click Search.
9. Select the radio button for the case of the searched child.
10. Click Continue.
11. The Create New Case after Finalization pop-up page displays.
12. Click **Continue** or click **Create** if there is not already an existing Post Adoption FSFN Case for the Provider adopting the current child.

13. A new Post Adoption FSFN Case displays.

14. Click **Save**.

15. Click **Close**.

### Create a Young Adult Case

#### About Creating a Young Adult Case

Access the Create Young Adult Case pop-up page via the Options drop down on the Participants Tab of the Maintain Case page, in maintain mode.

The page displays all young adults who meet the following criteria:

- Are 18 years or older based on date of birth
- Have a Service Role of Children Receiving Services on the Maintain Case page
- Do not have any “Pending” Title IV-E Foster Care Eligibility Determinations (Initial or Redetermination), Adoption Eligibility records, Adoption TANFs, and TANFs (case only); this does not apply to pending EFC IV-Es and Medicaid does not have to be closed.

Users can select which young adult they want to select by clicking the checkbox next to the participants name and clicking the Continue button.

#### Key Tasks

**To create a Young Adult Case**

1. From the **Options** drop down on an existing case, select **Create Young Adult Case**.
2. Click **Go**.
3. The **Create Young Adult Case Participant Selection** pop-up page displays.
4. Select check box for applicable young adult; the pop-up page is single selection only and does not allow for multiple participants to be selected at one time.

5. Click **Continue**.

6. The **Maintain Case** page displays with the selected participant and the Last/Provider name field, Case Type drop down, Family Structure drop down and County drop down as enabled and required.

7. Click **Save**

8. Click **Close**

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**Create Background Checks**

**About Creating Background Checks**

The Create Background Checks pop-up page is accessed by selecting Create Background Checks from the Options drop down on the Participants Tab of the Maintain Case page.

The page displays active case participants, 12 years old or older, not unknown, and who have a date of birth or a Social Security Number (or both):

Once the background check is requested, the “Status” of the Request is “Pending” and the check box for that participant is disabled and grayed out. Once the background check is completed, the check box will become enabled once again and the “Status” of the Request is “Complete.”

**Key Tasks**

**To creating a Background Check Request**

1. From the **Options** drop down on an existing case, select **Create Background Checks**.

2. Click **Go**.

3. The **Create Background Checks** pop-up page displays.
4. Select the radio button for the **Request Type**: Emergency Placement, Planned Placement or Reunification.

5. Select the check box for the case participant, 12 years of age or older.

6. Click **Request Background Check**.

**Note**: Upon selecting the Request Background Check button, certain pieces of data that are necessary for processing background checks are not required when submitting the request. The system will verify the data is captured and only once the validations are met will the request be submitted to the Background Check Listing queue.

7. Click **Close**.
Create an Emergency Placement Background Check

About Creating an Emergency Placement Background Check
The Maintain Case page will be modified such that the Emergency Placement prompt will be displayed upon the user selecting the Request Background Check button on the Create Background Check pop-up page once all validation edits have passed, when the Request Type is Emergency Placement. This will ensure that the user certifies the necessary statements before submitting background checks for emergency placement reasons.

Key Tasks

To creating an Emergency Placement Background Check Request

1. From the Options drop down on an existing case, select Create Background Checks.
2. Click Go.
3. The Create Background Checks pop-up page displays.
4. Select the Emergency Placement radio button.
5. Select the check box for the case participant, 12 years of age or older.
6. Click Request Background Check.

Note: Upon selecting the Request Background Check button, certain pieces of data that are necessary for processing background checks are not required when submitting the request. The system will verify the data is captured and only once the validations are met will the request be
submitted to the Background Check Listing queue.

**Note:** If the selected participant doesn’t have a SSN or Non-Citizen ID on Person Management, a validation for Emergency Placement Background Checks will verify the data is captured and only once the validations are met will the Emergency Placement certification prompt be displayed.

**Note:** Additional validations for Emergency Placement Background Checks will verify the data is captured and only once the validations are met will the Emergency Placement certification prompt be displayed.

7. Click **Yes**, the request will be sent to the Background Check Listing queue and the user will be returned to the Create Background Check pop-up page.

OR

Click **No**, the request will not be sent to the Background Check Listing queue and the user will be returned to the Create Background Check pop-up page.
Launch Interstate Compact Placement Request (ICPC) Checklists

About ICPC Parent Checklists
Selecting an ICPC checklist launches the ICPC Parent Checklist for children going from Florida to another State.

Key Tasks

To generate an ICPC

1. From the Options drop down of an existing case, select ICPC Parent Checklist or ICPC Priority Reg. 7 Checklist,
2. The ICPC Parent Checklist or ICPC Priority Reg. 7 Checklist template displays.
3. Click Save and Return to FSFN.
4. Click Close.