



Department of  
**Children's Services**

# Storyboard

## Assigning Private Provider Resource Homes

This storyboard demonstrates how to assign a PP Resource Home.

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## Viewing the Home Screen

In order for case assignments to be made, the private provider supervisor and resource home worker is required to have the appropriate security access. The supervisor or designee must have the "PP Resource Home Supervisor" and the "PP Resource Home" security user group. Each resource home worker must have the "PP Resource Home" security user group. This will allow the worker to be assigned roles in order to add/update resource homes for their agency. Check with your FCCR to make sure you have the appropriate Securities if you have issues.

Note: Confidential information has been redacted from each screen.

## Getting Familiar with your Home-Workload Screen

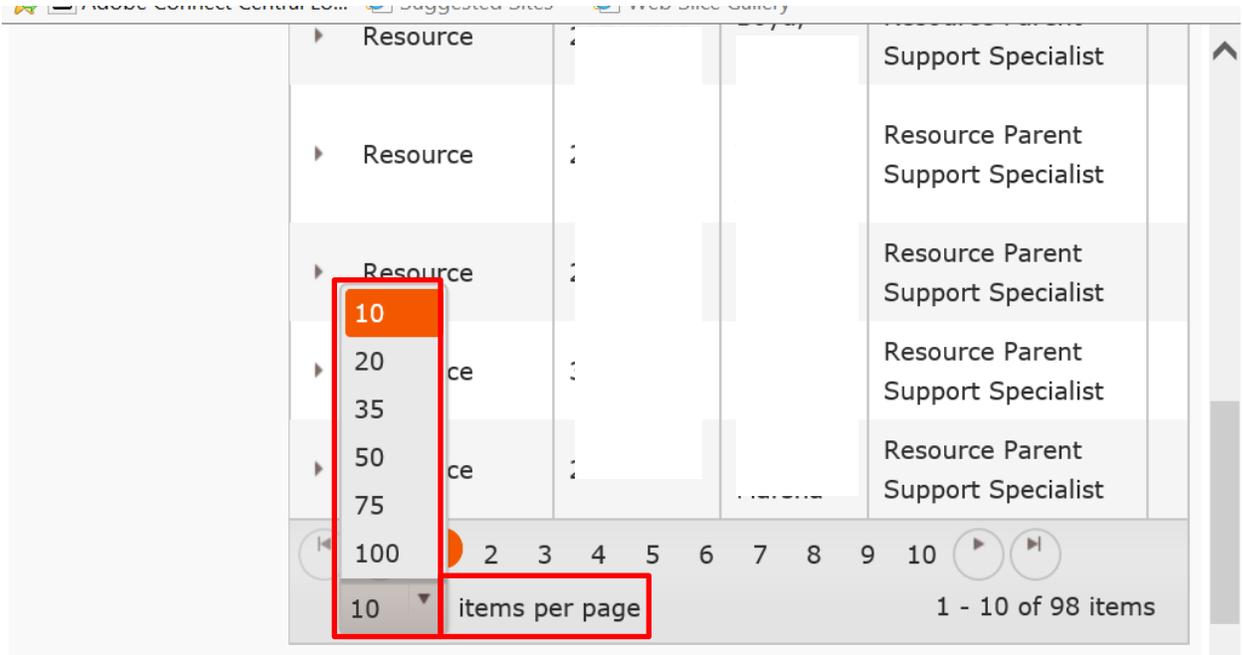
Log onto TFACTS with your username and password

The screenshot shows the TFACTS Home-Workload Screen. At the top, there is a navigation bar with links for [home](#), [search](#), [incident reporting](#), [help & training](#), [customer care](#), and [log off](#). Below this is a main navigation bar with tabs for **Home**, Case, Resource, Administration, **Workload**, Desktop, and Calendar. The Workload tab is active, showing a 'Viewing for' dropdown and a 'Supervises' button. A table displays workload items with columns for Type, ID, Name, and Assignment Role. A notification badge in the top right corner shows the number 4.

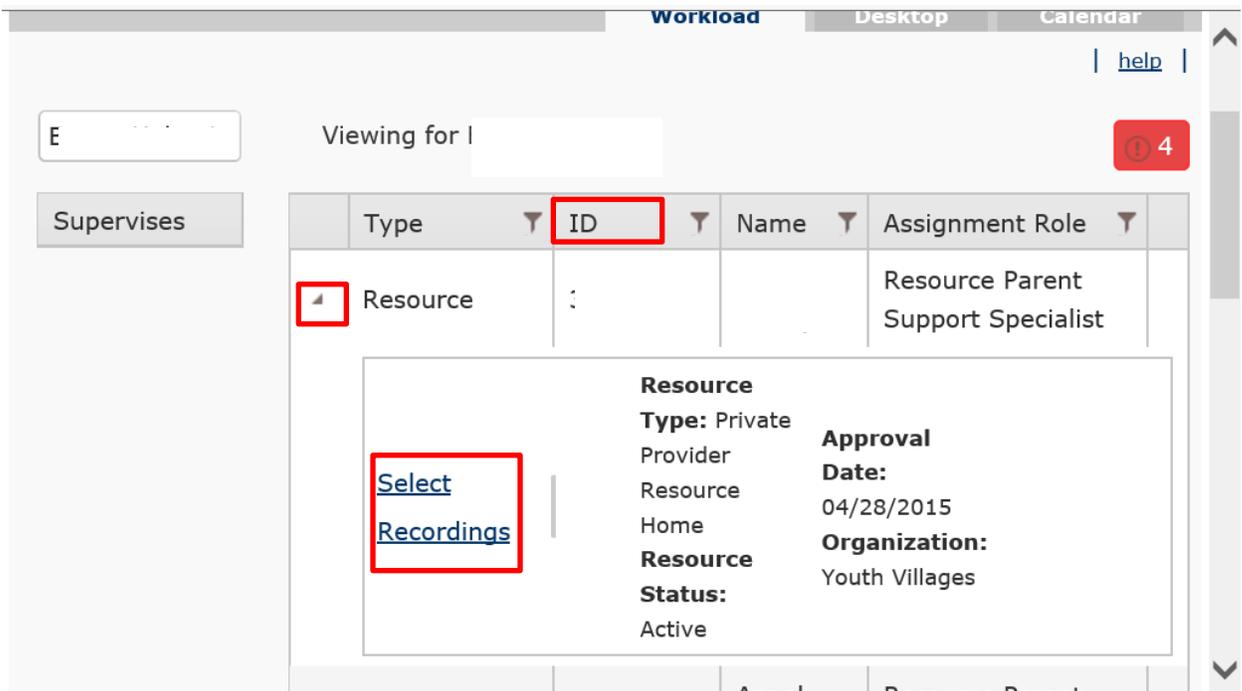
Type	ID	Name	Assignment Role
Resource			Resource Parent Support Specialist
Resource			Resource Parent Support Specialist

The Home Screen displays the Workload for the person who is logged in.

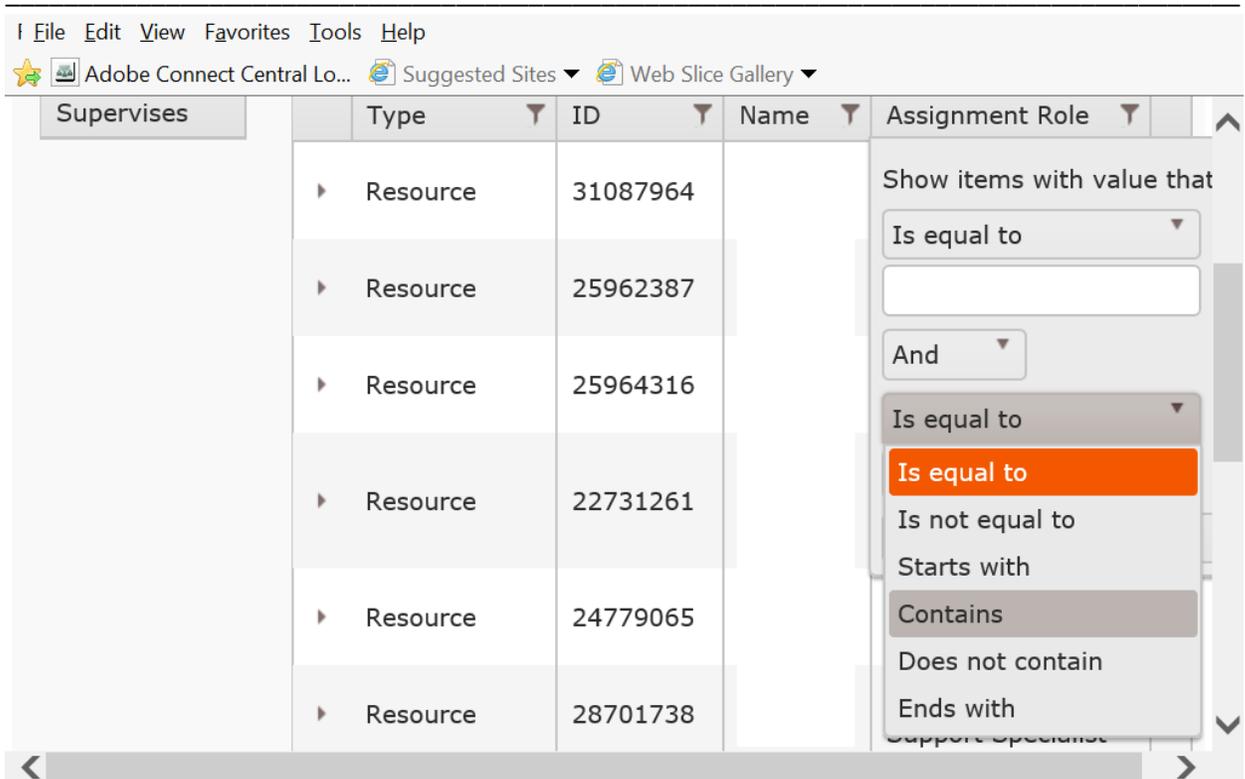
- The Desktop sub-tab is in a new location and no longer the default screen when logging on.
- Newly Assigned work Items will filter to the top.
- The numbers in the far right column reflect when the action of assigning the work item to the worker occurred in the system. (None displayed here) if the case has been assigned less than 5 days.
- It does not reflect the assignment begin date.
- Those who have the ability to make assignments also have the ability to make corrections to assignments (dates, roles, employees, etc.)
- Anyone supervised by the logged in employee will display in a list under the logged in employee's workload. To display the workload for employees supervised click on the **employees** name.



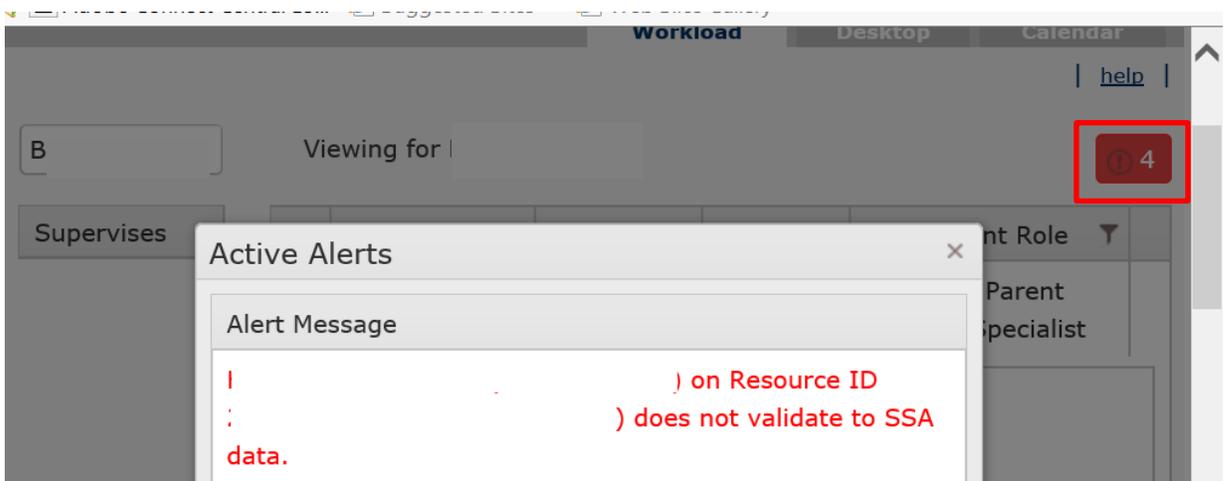
- Workload defaults to display 10 items per page.
- The number of cases displayed can be changed by selecting a different number of items to display per page to make it easier to find a specific home.



- Clicking the arrow beside the item expands the item to display details and “quick links”.
- Clicking on the column title will sort the column in ascending or descending order.



- Clicking the funnel enables a search/filter of the column.
- The Filter values show several options, however the “Contains” option seems to be the most effective when filtering.



- Clicking on the Red indicator at the top right of page, will display your Active Alert Messages (if any).

**Continue to the next sub topic**

## Features for Supervisors/Administrators (Assigning Capability)

Supervisors will have the ability to assign a home to the Resource Parent Support Specialist now without having to assign to themselves first.

- Click on the Resource tab or the [Search](#) Link. Clicking Search link requires clicking the Resource Search tab
- Search for your Home by Name or ID. Searching by Name may require other search criteria be changed

The screenshot displays the TFACTS web application interface. At the top, there is a navigation bar with links for [home](#), [search](#) (highlighted with a red box), [incident reporting](#), [help & training](#), [customer care](#), and [log off](#). The user is logged in as 'E...'. Below the navigation bar is a main menu with tabs for **Home**, **Case**, **Resource** (highlighted with a red box), and **Administration**. Under the 'Resource' tab, there are sub-tabs for **Workload**, **Desktop**, and **Calendar**. A search input field is visible with the text 'Viewing for E...'. Below this is a table with columns: Type, ID, Name, and Assignment Role. The table contains two rows, both labeled 'Resource' with 'Resource Parent Support Specialist' as the assignment role. At the bottom, there is a 'Person Search' section with a 'Resource Search' tab (highlighted with a red box). The search criteria include: Person ID, SSN, Reference Type (dropdown), Reference Number, Last Name, and First/Middle Name.

- Select Home
- From **Resource Overview Page**, click on **Assignment History** link.

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**Resource Overview**

Resource Name: Organization: Youth Villages  
Type: Sub-Type: Regular  
Resource ID: Status: Approved  
Primary Address: Primary Contact:

Approval Begin Date: 06/25/2015 Approval End Date: 06/24/2017  
Approved Capacity: 1 Gender: Both

**Resource Actions**

[Maintain Resource Information](#)

**Assignment Information**

[Assignment History](#)

Organization	Employee Name	Supervisor Name	Assignment Role
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	Resource Specialist 3	Parent Support Specialist	10/29/2013	04/20/2015
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10 items per page 1 - 3 of

**Add**

Apply Save Cancel

Click **Add**

The screenshot shows a web form with the following elements:

- Assign To:\*** - A text input field.
- Assignment Begin Date:\*** - A date picker field.
- Assignment End Date:** - A date picker field.
- Assignment Role:\*** - A dropdown menu with the following options:
  - Resource Parent...
  - Resource Home Study Writer
  - Resource Parent Support Specialist (highlighted in orange)
- Save** and **Cancel** buttons at the bottom left.

- Fill in the **Assign To** field by typing the employee Last Name, First Name
  - Employees name will appear in a list, click to select the employee
- Enter **Assignment Begin Date**
- Choose **Assignment Role**
- Assignment Role will sometimes auto populate based on the work item or case.

**Continue to the next sub topic**

## Supervisor New Features – Manage Other Workloads

### From home screen

- In the name text box, another staff person’s name can be typed in.
- Once the name has been entered, that staff person’s workload will display.
- Any staff that worker supervises will also display in the column on the left.

Note: This is beneficial in assisting other supervisors that may be out of the office make assignments or approve items as needed.

The screenshot shows the TFACTS Workload management interface. At the top, there are navigation tabs: Home, Case, Resource, Administration, Desktop, Calendar, and Approvals. The 'Administration' tab is active, and the 'Workload' sub-tab is selected. On the left, there is a 'Supervises' list with entries 'Cc', 'Ell', and 'St'. A search box labeled 'Sa' contains the text 'Duck, Daisy'. The main area shows a table of workload items for 'Duck, Daisy'. The table has columns for Type, ID, Name, and Assignment Role. All items are of Type 'Resource' and have the role 'Resource Parent Support Specialist'. The table is paginated, showing 10 items per page, and the current page is 1 of 30 items.

Type	ID	Name	Assignment Role
Resource	2		Resource Parent Support Specialist
Resource	2		Resource Parent Support Specialist
Resource	2		Resource Parent Support Specialist
Resource	2		Resource Parent Support Specialist
Resource	2		Resource Parent Support Specialist
Resource	2		Resource Parent Support Specialist
Resource	2		Resource Parent Support Specialist
Resource	2		Resource Parent Support Specialist
Resource	2		Resource Parent Support Specialist
Resource	2		Resource Parent Support Specialist

Continue to the next sub topic

## Reassigning Resource Homes

The screenshot shows the 'Workload' tab in the TFACTS interface. At the top, there are tabs for 'Workload', 'Desktop', 'Calendar', and 'Approvals'. Below these, there are input fields for 'Mouse, Mickey' and 'Viewing for Duck, Donald'. To the right, there is a 'Reassign' button highlighted with a red box, and an 'End' button. Below the buttons is a table with columns: Type, ID, Name, and Assignment Role. The first row is highlighted in orange and shows 'Resource' under Type, and 'Resource Parent Support Specialist' under Assignment Role. There are four rows in total, all with 'Resource' under Type and 'Resource Parent Support Specialist' under Assignment Role.

From the home page

- Supervisors have their workers listed under them.
- Click on the worker that has a Home(s) to be reassigned to another worker. The “Viewing for” changes from the Supervisor’s workload to the selected Workers workload.
- Highlight the home by clicking anywhere on that line. (It will turn orange).
- Click on the Reassign button.

The screenshot shows the 'Required Information' dialog box overlaid on the workload interface. The dialog box has a title bar with a close button (X). The main text reads: 'To reassign the selected assignment(s) please select a date and employee below.' There are two input fields: 'Assignment Begin Date:\*' with the value '04/18/2016' and a calendar icon, and 'Reassign To:\*' with the value 'Duck, Daisy'. At the bottom of the dialog box, there are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted by a red box.

- Enter **Assignment begin Date**
- Enter **Reassign To** field (Last Name, First Name)
- Click **Save**

**Note:** The user may also select multiple records at the same time by using the shift or control keys and clicking additional records.

All Resource Homes selected must be reassigned using the same date, which is useful if an employee were to resign.

Assignments can be ended from the workload screen by clicking on the case, then clicking the “End” button.

The screenshot shows a workload management interface. At the top, there is a search bar and a 'Viewing for' dropdown. To the right are buttons for 'Reassign' and 'End', with the 'End' button highlighted by a red box. On the left, a 'Supervises' sidebar shows a list of resources with counts (29 and 24). The main area is a table with the following columns: Type, ID, Name, and Assignment Role. The table contains five rows, all with 'Resource' as the Type and 'Resource Parent Support Specialist' as the Assignment Role. The last row shows a resource named 'Curis' with ID '27202559'.

Type	ID	Name	Assignment Role
Resource			Resource Parent Support Specialist
Resource			Resource Parent Support Specialist
Resource			Resource Parent Support Specialist
Resource			Resource Parent Support Specialist
Resource	27202559	Curis	Resource Parent Support Specialist

**You have completed this storyboard**