



# Storyboard

## Case Assignment for Private Provider Supervisors

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## What is the purpose of the Case Assignment Process?

- To streamline/simplify the assignment process and the maintenance of case assignments
- Enable system users to easily identify who is responsible for tasks on a case
- Use assignment roles as a key to producing reliable, accurate caseload reports (*in hopes of someday eliminating manual hand-counting of cases!*)

## A Farewell to Roles

Roles titles that were terminated from the TFACTS system in December, 2015

- Primary Case – Family Service Worker
  - Was supposed to identify one person who was ultimately responsible for the case; however, feedback from customers indicated it wasn't really being used that way.
  - Additionally, it is a generic role that doesn't specify what the assignee is responsible for.
- Family Service Worker
  - Family Service Worker was coined to replace the term 'Case Manager'. It really should never have been made into an assignment role. It will still be a part of the DCS culture and terminology moving forward. You will still see it in policies and other places. It just won't be an assignment role in TFACTS.
- Worker
  - ??? Does anyone really know what this was for???
- Supervisor
  - A Supervisor supervises employees.
  - When an employee is assigned, TFACTS knows the employee's supervisor and can automatically make the association between the supervisor and the work item being assigned.
  - No need for a manual assignment of the Supervisor role.
  - Makes it that much more important to ensure your employee/supervisor data is kept current in TFACTS!

## Current Features

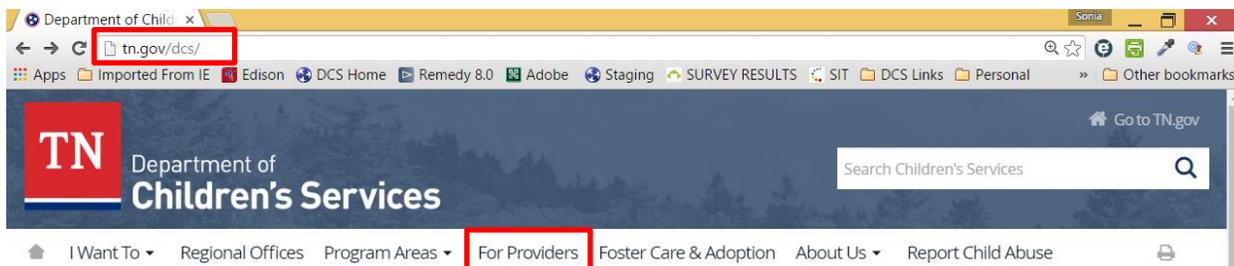
- Access Assignment History from various places throughout TFACTS
- Correction utility for assignments
  - Those who have the ability to make assignments will now have the ability to make corrections to assignments (dates, roles, employees, etc.)
- New Workload page design
  - Navigate to frequently accessed modules within a Case directly from the new Workload page.
  - Manage assignments directly from the Workload page.

## Private Provider Workload Screen

The Workload screen allows access into a child/youth's Ongoing Case work item information. This section is going to demonstrate how to access information utilizing the workload screen.

## Logging into TFACTS

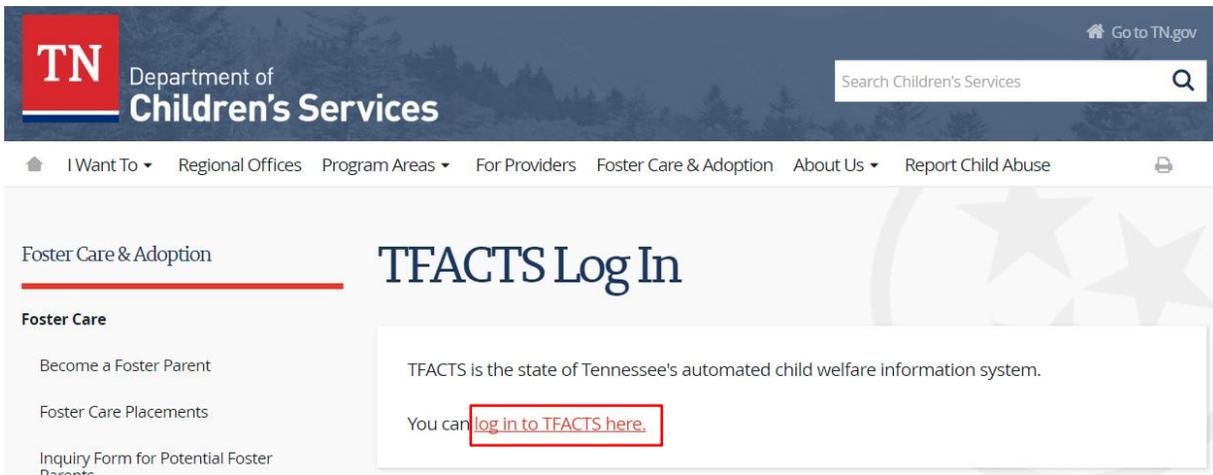
- Once approved for training a Private Provider Private Provider Worker is given a User name and a Password
- Log in: <http://tn.gov/dcs/>
- Click For Providers tab



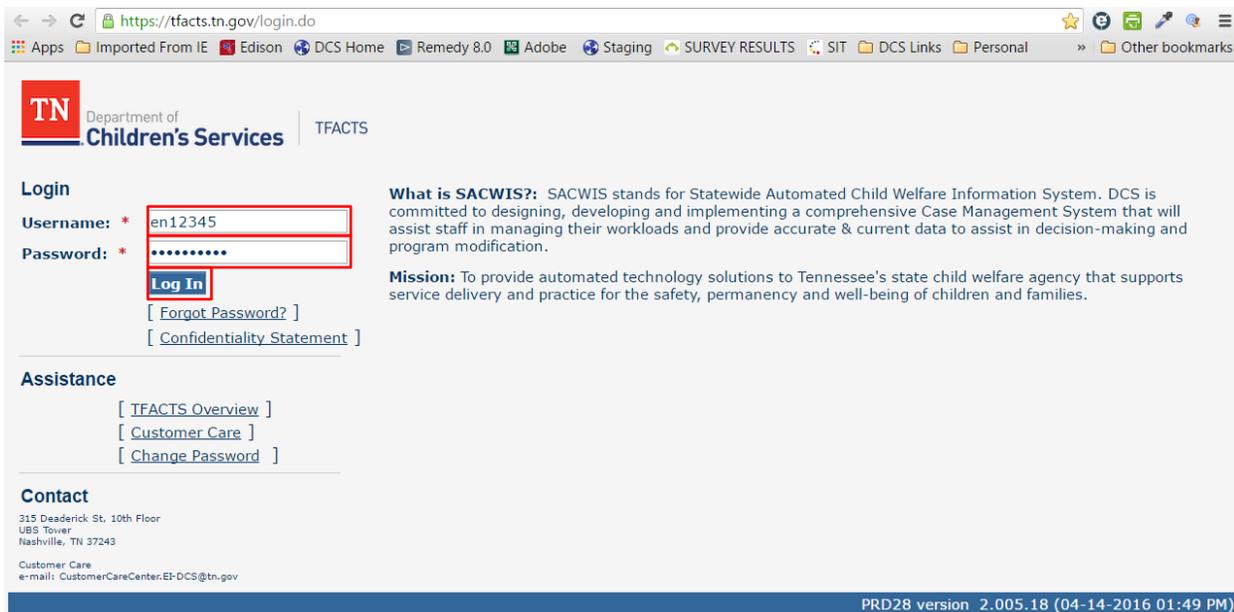
- Providers & Partners page
- Scroll to the bottom of the page
- Quick Links section
- Click TFACTS Log-In



- TFACTS Log In page
- Click **log in to TFACTS** here link



- Username: \* enter **en number**
- Password: \* enter **assigned password**
- Click **Log In** button



Continue to the next sub topic.

## Viewing Workload Screen

- **Home** Screen
- **Workload** tab
- **Viewing Worker** box: System defaults to the name of the person logged into the system
- **Viewing for:** Lists the workload currently being viewed
- **Supervises section:** Will see list of all personnel being supervised
- **Field Grid:** Current log in viewing of Private Provider's Work Item assignments

The screenshot shows the TFACTS Workload screen. At the top, there is a navigation bar with links for home, search, incident reporting, help & training, customer care, and log off. The user is logged in as Thackaberry, Fabian. The main navigation tabs include Home, Case, Resource, Administration, Desktop, Calendar, and Approvals. The 'Workload' tab is selected. On the left, there are two boxes: 'Thackaberry, Fabian' and 'Supervises Ibarra, Reatha (20)'. The main area displays a table of assignments for 'Viewing for Thackaberry, Fabian'. The table has columns for Type, ID, Name, and Assignment Role. Below the table, there are pagination controls showing '10 items per page' and '1 - 8 of 8 items'.

Type	ID	Name	Assignment Role
▶ Ongoing Case	65	Canale, Moira	Private Provider Worker
▶ Ongoing Case	28	Cutia, Harry	Private Provider Worker
▶ Ongoing Case	29	Diluca, Dusty	Private Provider Worker
▶ Ongoing Case	26	Gerveler, Lance	Private Provider Worker
▶ Ongoing Case	27	Midkiff, Brandy	Private Provider Worker
▶ Ongoing Case	27	Midkiff, Rebecca	Private Provider Worker
▶ Ongoing Case	29	Stalvey, Jaime	Private Provider Worker
▶ Ongoing Case	16	Treichler, Alleen	Private Provider Worker

## Viewing Assignment Assigned Time Frames

- **New work items** will be located at the top of the field grid
- The recently assigned work items will be color coded with numbers: **<1, 2-3,4-5 located beside the Assignment Role grid**
- After 5 days they will no longer have a days assigned feature beside the work item

Assignment Role	
Private Provider Worker	<1
Private Provider Worker	<1
Private Provider Worker	<1
Private Provider Worker	4-5
Private Provider Worker	4-5
Private Provider Worker	
Private Provider Worker	

**Continue to the next sub topic.**

## Viewing Cases from the Workload Screen

- From **Workload** Screen
- **Scroll** to the bottom
- User will see filtering options for the number of cases in the caseload
  - **Page Numbers and arrows**
    - i. User can use page numbers and arrows to page through the caseload 10 cases at a time
  - **Items per page** drop down box
    - i. User can select how many cases to view upon opening the Workload tab.

The screenshot displays the 'Workload' screen for Reatha Ibarra. The interface includes a navigation bar with 'Home', 'Case', 'Resource', and 'Administration' tabs. Under 'Administration', there are sub-tabs for 'Workload', 'Desktop', 'Calendar', and 'Approvals'. A search box contains 'Ibarra, Reatha', and the view is filtered to 'Reatha's Work (0)'. A table lists 10 ongoing cases, each assigned to a Private Provider Worker. The pagination controls at the bottom of the table are highlighted with a red box, showing page numbers 1 and 2. The 'Items per page' dropdown menu is also highlighted with a red box, showing the value 10.

Type	ID	Name	Assignment Role
Ongoing Case	25	Ahern, Ryan	Private Provider Worker
Ongoing Case	93	Brott, Jayne	Private Provider Worker
Ongoing Case	93	Brott, Jenell	Private Provider Worker
Ongoing Case	63	Byman, Latoyia	Private Provider Worker
Ongoing Case	29	Cobourn, Hosea	Private Provider Worker
Ongoing Case	20	Greely, Lucien	Private Provider Worker
Ongoing Case	35	Kristofferson, Sheilah	Private Provider Worker
Ongoing Case	50	Kristofferson, Troy	Private Provider Worker
Ongoing Case	75	Langrum, Bessie	Private Provider Worker
Ongoing Case	100	Langrum, Franklyn	Private Provider Worker

**Continue to the next sub topic.**

## Filtering in the Workload Grid

- Click on the **Title** bars and the system will sort ascending and descending order

Name ^	Name v
Ahern, Ryan	Rowlett, Maryann
Brott, Jayne	Reilly, Todd
Brott, Jenell	Reilly, Lloyd
Byman, Latoyia	Reilly, Lloyd
Cobourn, Hosea	Midkiff, Arnold
Greely, Lucien	Mandoza, Eldridge
Kristofferson, Sheilah	Leukuma, Drusilla
Kristofferson, Troy	Langrum, Lloyd
Langrum, Bessie	Langrum, Kerstin
Langrum, Franklyn	Langrum, Jesus
ems per page	ems per page

- Click the **Funnel** to see search and filtering choices for each grid column.
- The **“Contains”** option seems to be the most effective option.

The screenshot shows the TFACTS Workload Grid interface. At the top, there are navigation tabs: Home, Case, Resource, Administration, Workload, Desktop, Calendar, and Approvals. The 'Workload' tab is active. Below the navigation, there is a search bar containing 'Ibarra, Reatha' and a status indicator 'Reatha's Work (0)'. A 'Supervises' list is on the left, and the main grid displays a list of cases. The grid columns are Type, ID, Name, and Assignment Role. A dropdown menu is open for the 'Assignment Role' column, showing filtering options: Contains, Is equal to, Is not equal to, Starts with, Does not contain, and Ends with. The 'Contains' option is highlighted in orange. At the bottom, there are pagination controls showing '10 items per page' and '1 - 10 of 20 items'.

Continue to the next sub topic.

## Using Ongoing Case Work Item Grid

- Custodial Case Types are titled **Ongoing Case Type**
- Ongoing Case assignments will now be assigned as child specific to each Private Provider Worker
- Clicking the **Arrow** beside the work item expands the item to display details and “quick links” and “icons”.
  - Click **Select** to open the family case
  - Click **Recordings** to go to the Case recordings page
  - Click the **Person** icon to go to the Person Profile page
  - Click the **Notebook icon to go to the Monthly Provider Summary** page
  - Click the **Notebook icon with the plus (+) sign to Add Provider Monthly Summary**
  - Click the **Pencil icon to record Service Sessions**

**Note:** if you toggle (or hold your cursor) over the icons, you will get the title for each of the icon boxes

The screenshot shows the TFACTS interface for Reatha Ibarra. The main content area displays a table of ongoing cases. The first row is highlighted in orange and contains the following data:

Type	ID	Name	Assignment Role
Ongoing Case	28	Rowlett, Maryann	Private Provider Worker
Ongoing Case	18E	Reilly, Todd	Private Provider Worker
Ongoing Case	18E	Reilly, Lloyd	Private Provider Worker
Ongoing Case	18E	Reilly, Lloyd	Private Provider Worker
Ongoing Case	27E	Midkiff, Arnold	Private Provider Worker
Ongoing Case	287	Mandoza, Eldridge	Private Provider Worker
Ongoing Case	111	Leukuma, Drusilla	Private Provider Worker
Ongoing Case	930	Langrum, Lloyd	Private Provider Worker
Ongoing Case	292	Langrum, Kerstin	Private Provider Worker
Ongoing Case	292	Langrum, Jesus	Private Provider Worker

A red box highlights the expanded view for the first row, showing the following details and links:

- [Select](#)
- [Recordings](#)
- Case Status: Open
- Case Status Date: 03/31/2015
- Organization: SI
- Person icon
- Notebook icon
- Notebook icon with plus sign
- Pencil icon

**Continue to the next sub topic.**

## Viewing the Case Assignments for the child/youth

- From **Ongoing** Case
- Click **Select**

Supervises	Type	ID	Name	Assignment Role
Ibarra, Reatha (20)	Ongoing Case	25	Ahern, Ryan	Private Provider Worker
<div style="border: 1px solid #ccc; padding: 5px;"> <span style="border: 1px solid red; padding: 2px;">Select</span> <span style="margin-left: 10px;">Case Status: Open</span> <span style="float: right;">Organization: Southwest Region</span> <span style="margin-left: 10px;">Case Status Date: 09/23/2014</span> </div>				
<div style="border: 1px solid #ccc; padding: 5px;"> <a href="#">Recordings</a> </div>				
<div style="border: 1px solid #ccc; padding: 5px;"> <span></span> <span></span> <span></span> <span></span> </div>				

- Once Selected, the Family Case opens in the Case Tab
- Assignment Information will have Private Provider Worker and supervisor listed together with the assignment role
- All children and youth assigned in the case will be visible

[TRN](#) | [home](#) | [search](#) | [incident reporting](#) | [help & training](#) | [customer care](#) | [log off](#)

Logged In: Thackaberry, Fabian [ Meritan Inc ]

Home
Case
Resource
Administration
Overview

- ▶ **Case Overview**
- [Case Recording Forms/Notices](#)
- Assessments Document
- CFTM
- [Strengths and Concerns](#)
- [Permanency Goals](#)
- [Visitation Plan](#)
- [Permanency Plan](#)
- [Case Services](#)
- Court
- [Removal Records](#)
- [Placement Referral](#)
- [Placement](#)
- Individual Program Plan Classification
- [PreDisposition Report](#)
- [Special Caution Alert](#)
- Incident Reports
- [IL Program Eligibility and Service Referral](#)
- [Relative Caregiver](#)
- [Transitional Survey](#)

**Case Header**

Case ID: 2
Case Name: Huesman, Magda
Case Status: Open
Organization: Region

**Case Overview**

**Case Actions**

- [View Case Information](#)
- [View Case Status History](#)
- [Linked/Associated Cases](#)
- [Genogram/Ecomap](#)
- [Case Summary](#)

**Case Address**

**Hazards**

Hazard Type	Person/Address
No current Hazards have been identified	

**Assignment Information**

[Assignment History](#)

Organization	Employee Name Supervisor Name	Assignment Role	Child/Youth Name
SI	Arter, Bea Montcalm, Freeda	SS Custody Worker	Rowlett, Maryann
S	Bindas, Santos Merrow, Greg	SS Custody Worker	Rowlett, Maryann
M	Ibarra, Reatha Thackaberry, Fabian	Private Provider Worker	Rowlett, Maryann

**Case Alerts**

**Continue to the next sub topic.**

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## Viewing the Case Recordings for the child/youth

- From **Ongoing** Case
- Click the **Recordings** link to navigate directly to the Case Recordings

Supervises	Type	ID	Name	Assignment Role
Ibarra, Reatha (20)	Ongoing Case	25	Ahern, Ryan	Private Provider Worker
<a href="#">Select Recordings</a>		Case Status: Open Case Status Date: 09/23/2014		Organization: Southwest Region

- Utilize the search criteria button, add recording button and the print options, as per current practice (Need instructions: Look for a Storyboard in the Providers, TFACTS Training section)

[TRN](#) | [home](#) | [search](#) | [incident reporting](#) | [help & training](#) | [customer care](#) | [log off](#)

Logged In: Thackaberry, Fabian [ Meritan Inc ]

[Home](#)

[Case](#)

[Resource](#)

[Administration](#)

[Overview](#)

- [Case Overview](#)
- [Case Recording](#)
- [Forms/Notices](#)
- [Assessments](#)
- [Document](#)
- [Good Faith Attempts / Diligent Search Efforts](#)
- [CFTM](#)
- [Strengths and Concerns](#)
- [Permanency Goals](#)
- [Visitation Plan](#)
- [Permanency Plan](#)
- [Case Services](#)
- [Court](#)
- [Removal Records](#)
- [Placement Referral](#)
- [Placement](#)
- [Individual Program Plan Classification](#)
- [PreDisposition Report](#)
- [Special Caution Alert](#)
- [Incident Reports](#)
- [IL Program Eligibility and Service Referral](#)
- [Relative Caregiver](#)
- [Transitional Survey](#)

Case ID: 25
Case Name: Elsasser, Heike
Case Status: Open
Organization: Southwest Region

Recording Search Criteria

Contact From Date:	<input type="text"/>	Contact To Date:	<input type="text"/>
Entered By:	<input type="text"/>	Location:	<input type="text"/>
Status:	<input type="text"/>	Participant:	<input type="text"/>
Contact Type:	<input type="text"/>	Contact Method:	<input type="text"/>
Sort Results By:	<input type="text"/>		

[Search](#)
[Clear Form](#)

[Add Recording](#)
[Print](#)

Result(s) 0 Page 0 of 0

Recording ID	Contact Date	Contact Type	Participant	Entered By
Status	Contact Method			Location
<< To view history or recent activity, complete a search. >>				

[Add Recording](#)
[Print](#)

Continue to the next sub topic.

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## Viewing the Person Overview icon

- From **Ongoing Case**
- Click the **Person Overview** icon to navigate directly to the Person Overview page

Supervises	Type	ID	Name	Assignment Role
Ibarra, Reatha (20)	Ongoing Case	25	Ahern, Ryan	Private Provider Worker
<a href="#">Select Recordings</a>		Case Status: Open Case Status Date: 09/23/2014		Organization: Southwest Region
  				

- Utilize the search **Person Overview** icon to view information available (Viewing availability will be based on Security Roles granted)



TRN

[home](#) | [search](#) | [incident reporting](#) | [help & training](#) | [customer care](#) | [log off](#)

Logged In: Thackaberry, Fabian [ Meritan Inc ]

[help](#)

**Person Overview**

Person ID:	11	Gender:	Male
Name:	Ahern, Ryan	DOB:	07/02/2008
Address:		Age:	7 Yrs
Phone/Contact:		Employee:	No

**Person Details**

<a href="#">Person Profile</a>	<a href="#">Person Characteristics</a>	<a href="#">Scan Documents</a>
<a href="#">Education</a>	<a href="#">Legal History</a>	<a href="#">Monthly Summary</a>
<a href="#">Health</a>	<a href="#">TFACTS History</a>	<a href="#">Military History</a>
<a href="#">Financial</a>	<a href="#">Relationship History</a>	<a href="#">Merge History</a>
<a href="#">Assessment History</a>		

[Close](#)

[/intake/intake\\_person\\_basic.jsp](#) pm011\_view\_person\_overview TRN32 version 2.005.14 (03-17-2016 12:36 PM)

**Continue to the next sub topic.**

## Viewing the Provider Monthly Summary icon

- From **Ongoing** Case
- Click the **Monthly Summary** icon to navigate directly to the Monthly Summary page

Supervises	Type	ID	Name	Assignment Role
Ibarra, Reatha (20)	Ongoing Case	25	Ahern, Ryan	Private Provider Worker

Case Status: Open  
Case Status Date: 09/23/2014  
Organization: Southwest Region

Select Recordings

Monthly Summary icon highlighted in red box.

- Utilize the search Provider Monthly Summary icon to see Service Narrative information
- Enter information as instructed (Need instructions: Look for a Storyboard in the Providers, TFACTS Training section)

TRN | home | search | incident reporting | help & training | customer care | log off  
Logged In: Thackaberry, Fabian [ Meritan Inc ]

Home > Workload

Work Item Header  
Work Item ID: 97 | Work Item Type: Placement | Start Date: 01/15/2016 | End Date:

Monthly Summary List

Provider Name	Child Name	Service Period	ICD Type Code	ICD Code	Status
Provider, Polly	Ahern, Ryan	02/2016	ICD-10	F13980	Completed
Provider, Polly	Ahern, Ryan	01/2016	ICD-10	F13980	Narrative Needed

10 items per page | 1 - 2 of 2 items

Select Add Mark In Error

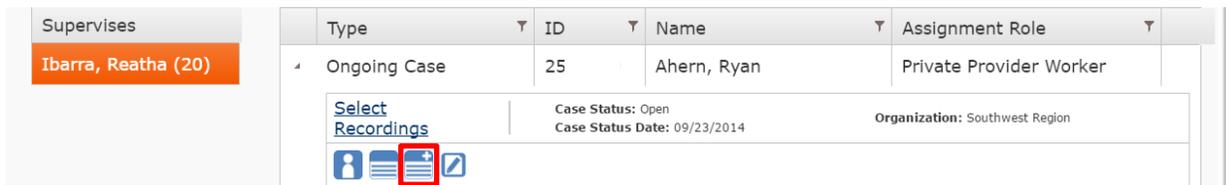
Close

HOME | HELP & TRAINING | PRIVACY & SECURITY | /administration/monthly\_summary\_list.jsp cm41\_s01\_monthly\_summary\_list TRN32 version 2.005.14 (03-17-2016 12:36 PM)

Continue to the next sub topic.

## Adding the Provider Monthly Summary icon

- From **Ongoing** Case
- Click **Adding Monthly Summary** icon to navigate directly to the Add Monthly Summary page
- Enter information as instructed (Need instructions: Look for a Storyboard in the Providers, TFACTS Training section)

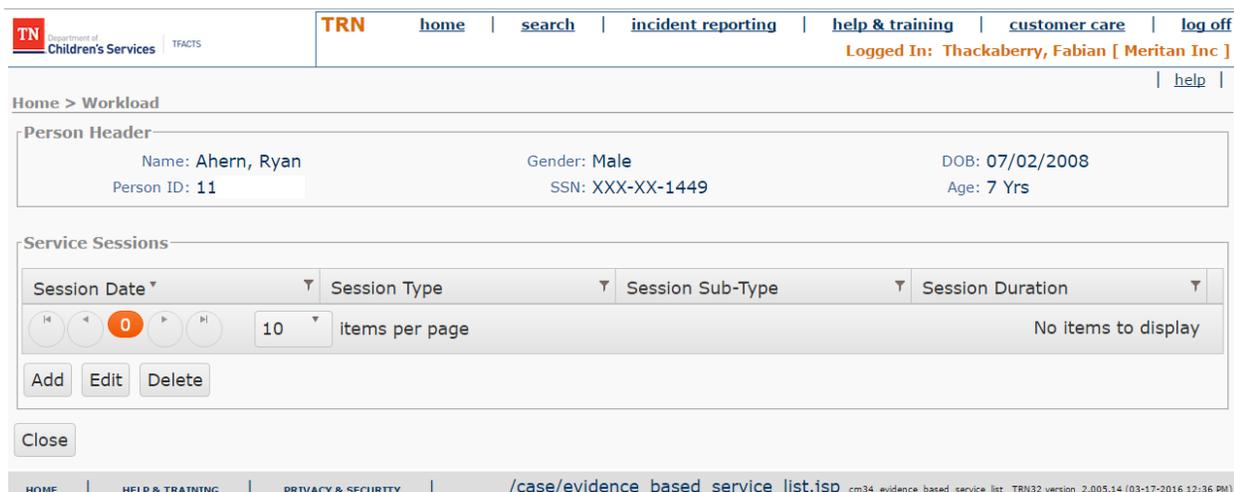


## Adding the Service Sessions icon

- From **Ongoing** Case
- Click the **Service Sessions** icon to navigate directly to the Service Sessions page



- Enter information as instructed (Need instructions: Look for a Storyboard in the Providers, TFACTS Training section)



Continue to the next subtopic.

## Desktop Sub Tab

- User must click the Desktop sub tab to display the Alert Summary and Message Board
- Once resolved the alerts manager will remove the alerts.

The screenshot displays the TFACTS Desktop sub-tab interface. At the top, there is a navigation bar with links for 'home', 'search', 'incident reporting', 'help & training', 'customer care', and 'log off'. The user is logged in as 'Ibarra, Reatha [ Meritan Inc ]'. Below the navigation bar, there are several tabs: 'Home', 'Case', 'Resource', 'Financial', and 'Administration'. Under the 'Administration' tab, there are sub-tabs for 'Workload', 'Desktop', 'Calendar', and 'Approvals'. The 'Desktop' sub-tab is currently selected. The main content area includes a 'Tip of the Day' section, a 'Message Board' with sections for 'Broadcast Messages', 'Organization Messages', and 'State Messages', and an 'Alerts' section. The 'Alerts' section shows 'Alert Message' with a search bar and '10 items per page'. The footer contains links for 'HOME', 'HELP & TRAINING', 'PRIVACY & SECURITY', and the current page URL: '/administration/admin\_desktop\_display.jsp'. The footer also includes the text 'cf36\_s25\_home\_desktop\_screen TRN32 version 2.005.14 (03-17-2016 12:36 PM)'.

## Case Tab

- The **Case Tab** now opens a case search screen.

The screenshot displays the TFACTS Case Tab interface. At the top, there is a navigation bar with links for 'home', 'search', 'incident reporting', 'help & training', 'customer care', and 'log off'. The user is logged in as 'Ibarra, Reatha [ Meritan Inc ]'. Below the navigation bar, there are several tabs: 'Home', 'Case', 'Resource', 'Financial', and 'Administration'. Under the 'Administration' tab, there are sub-tabs for 'Overview' and 'help'. The 'Case' tab is currently selected. The main content area includes a 'Case Search Criteria' section with fields for 'Case ID', 'Case Reference Type', and 'Case Reference #'. Below the search criteria is a 'Search' button and a 'Clear Form' button. The 'Case Search Results' section shows 'Result(s) 0' and 'Page 0 of 0'. A table with columns 'Case ID', 'Case Name', 'Case Type', 'Case Address', 'Current Case Status', 'Status Effective Date', and 'Organization' is displayed, with the message 'No Results Returned.' below it. The footer contains links for 'HOME', 'HELP & TRAINING', 'PRIVACY & SECURITY', and the current page URL: '/intake/intake\_case\_search.jsp'. The footer also includes the text 'cf52\_s01\_case\_search TRN32 version 2.005.14 (03-17-2016 12:36 PM)'.

Continue to the next section.

## Private Provider Case Assignment

Private provider supervisors will view all employees supervise under the Supervises title bar. This section will demonstrate viewing employee caseloads and assigning cases to the private provider worker.

### Supervisor Workload

- **Supervises Title Bar** contains all Private Provider Workers listed that being supervised
- Beside the workers name is the number of assigned work items that are currently assigned to the Private Provider Worker

The screenshot shows the TFACTS interface for a supervisor named Reatha Ibarra. The 'Supervises' sidebar on the left lists several workers with their assigned case counts in parentheses. The main table displays details for each case, including the type, ID, name of the worker, and their assignment role.

Supervises	Type	ID	Name	Assignment Role
Chell, Dustin	▶ Ongoing Case	2	Applin, Jaleesa	Private Provider Worker
Freelove, Shanna	▶ Ongoing Case	6	Arca, Mignon	Private Provider Worker
Huesman, Trey (6)	▶ Ongoing Case	6	Arca, Miles	Private Provider Worker
Konefal, Hans (3)	▶ Ongoing Case	6	Dalecki, Ardella	Private Provider Worker
Langrum, Neva (5)	▶ Ongoing Case	6	Dalecki, Connie	Private Provider Worker
Langrum, Sanda (3)	▶ Ongoing Case	6	Dalecki, Leslie	Private Provider Worker
Lozoya, Mozell (23)	▶ Ongoing Case	6	Dalecki, Wilbert	Private Provider Worker
Monsky, Pamela (10)	▶ Ongoing Case	2	Ahern, Ryan	Private Provider Worker
Seryak, Ludivina (4)	▶ Ongoing Case	9	Brott, Jayne	Private Provider Worker

Continue to the next sub topic.

## Viewing Private Provider Workload

- **Home** screen
- **Supervises Title Bar**
- Click on the name of the **Private Provider Worker** whose case you wish to view
- The name of the Private Provider **Worker is highlighted**
- To the right of the Supervisors name: **Viewing for** now will have the name of the **Private Provider Worker**
- The Private Provider Worker's **caseload is now visible** for the Supervisor to view and open the Ongoing Case as previously discussed

TRN Department of Children's Services TFACTS

home | search | incident reporting | help & training | customer care | log off

Logged In: Ibarra, Reatha [ Meritan Inc ]

Home Case Resource Financial Administration

Workload Desktop Calendar Approvals

Ibarra, Reatha

Viewing for Huesman, Trey

Trey's Work (0) 0 Reassign End

Type	ID	Name	Assignment Role
Ongoing Case	12	Canup, Eustolia	Private Provider Worker
Ongoing Case	29	Deroos, Devorah	Private Provider Worker
Ongoing Case	29	Foppe, Len	Private Provider Worker
Ongoing Case	29	Foppe, Sunny	Private Provider Worker
Ongoing Case	29	Foppe, Trinity	Private Provider Worker
Ongoing Case	89	Trefz, Major	Private Provider Worker

Supervises

- Chell, Dustin
- Freelove, Shanna
- Huesman, Trey (6)**
- Konefal, Hans (3)
- Langrum, Neva (5)
- Langrum, Sanda (3)
- Lozoya, Mozell (23)
- Monsky, Pamela (10)
- Seryak, Ludivina (4)

10 items per page 1 - 6 of 6 items

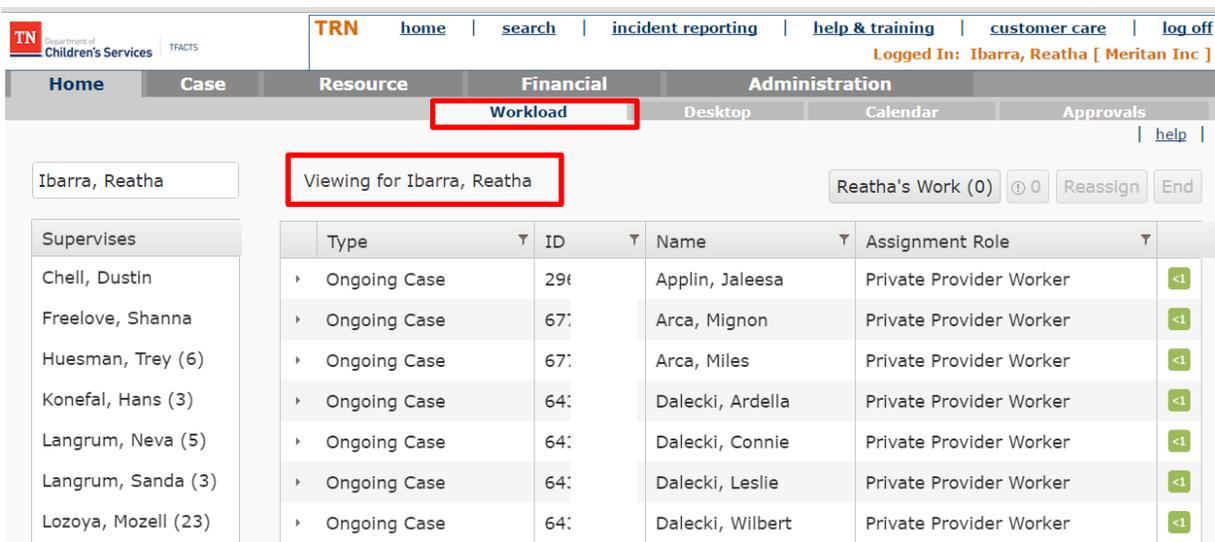
Continue to the next sub topic.

## Returning to Supervisor Workload

- Viewing from Worker screen
- Click on Supervisor name or Home tab



- Supervisor screen is now displaying Supervisors Workload
- Viewing for: Now displays the Supervisors name



Continue to the next sub topic.

## Assigning an Ongoing Case item to Private Provider Worker

When a placement is made to a Private Providers the system will automatically assign the child/youth to the provider agency designee. This section will demonstrate how to re-assign cases assigned to a designee. It will also demonstrate adding an additional Provider worker to the active Ongoing Case work item.

- From **Workload** screen
- **Highlight the case** to be Re-Assigned to a Private Provider Worker
- Click the **Reassign** button

TRN home | search | incident reporting | help & training | customer care | log off  
 Logged In: Ibarra, Reatha [ Meritan Inc ]

Home Case Resource Financial Administration  
 Workload Desktop Calendar Approvals help

Ibarra, Reatha Viewing for Ibarra, Reatha Reatha's Work (0) Reassign End

Supervises	Type	ID	Name	Assignment Role
Chell, Dustin	Ongoing Case	29	Applin, Jaleesa	Private Provider Worker
Freelove, Shanna	Ongoing Case	67	Arca, Mignon	Private Provider Worker
Huesman, Trey (6)	Ongoing Case	67	Arca, Miles	Private Provider Worker
Konefal, Hans (3)	Ongoing Case	64	Dalecki, Ardella	Private Provider Worker
Langrum, Neva (5)	Ongoing Case	64	Dalecki, Connie	Private Provider Worker
Langrum, Sanda (3)	Ongoing Case	64	Dalecki, Leslie	Private Provider Worker
Lozoya, Mozell (23)	Ongoing Case	64	Dalecki, Wilbert	Private Provider Worker
Monsky, Pamela (10)	Ongoing Case	25	Ahern, Ryan	Private Provider Worker
Seryak, Ludivina (4)	Ongoing Case	93	Brott, Jayne	Private Provider Worker

- **Required Information** pop up box will display
- Enter the Assignment Begin Date: **MM/DD/YYYY** (This is a required field and can be dated from the date assigned to designee if not the current date)
- Enter Reassign To: **Enter Last Name, First Name Highlight the correct name** (This is a required field)
- Click **Save** button

Required Information

To reassign the selected assignment(s) please select a date and employee below.

Assignment Begin Date: 04/01/2016

Reassign To: Chell, d  
 Chell, Del  
 Chell, Dominick  
 Chell, Dot  
 Chell, Dustin

Save Cancel

Case 643007  
 Case 25734

- **Supervises** Title Bar
- Click **Private Provider Worker** name:
- **Ongoing Case is now displayed** on the Private Provider Worker's tree

The screenshot shows the TFACTS interface. At the top, there is a navigation bar with links for home, search, incident reporting, help & training, customer care, and log off. The user is logged in as Ibarra, Reatha [ Meritan Inc ]. Below the navigation bar, there are tabs for Home, Case, Resource, Financial, and Administration. The Administration tab is active, and the Workload sub-tab is selected. The main content area shows a search for 'Ibarra, Reatha' and a view for 'Chell, Dustin'. A table displays the workload for 'Dustin's Work (0)'. The table has columns for Type, ID, Name, and Assignment Role. The first row is highlighted with a red box and contains the following data: Type: Ongoing Case, ID: 29, Name: Applin, Jaleesa, Assignment Role: Private Provider Worker. The table also includes pagination controls and a '10 items per page' setting.

Type	ID	Name	Assignment Role
Ongoing Case	29	Applin, Jaleesa	Private Provider Worker

Continue to the next sub topic.

## Assign Additional Private Provider Worker to a Case

There may be times that additional staff needs to be assigned within an Ongoing Case. This section will demonstrate how to assign an additional Private Provider Worker within a case.

- Locate **Ongoing Case**
- Click **Arrow beside Ongoing Case**
- Click **Select**

TRN home | search | incident reporting | help & training | customer care | log off  
 Logged In: Ibarra, Reatha [ Meritan Inc ]

Home Case Resource Financial Administration  
 Workload Desktop Calendar Approvals | help |

Ibarra, Reatha Viewing for Chell, Dustin Dustin's Work (0) Reassign End

Supervises	Type	ID	Name	Assignment Role
Chell, Dustin (1)	Ongoing Case	29	Applin, Jaleesa	Private Provider Worker
Freelove, Shanna				
Huesman, Trey (6)				
Konefal, Hans (3)				
Langrum, Neva (5)				

Case Status: Open  
 Case Status Date: 01/05/2015  
 Organization: Shelby Region

10 items per page 1 - 1 of 1 items

- From **Case Overview** screen
- Click **Assignment History**

Home Case Resource Financial Administration Overview | help |

Case Overview

Case ID: 29 Case Name: Applin, Tobie Case Status: Open Organization: Shelby Region

Case Actions

- View Case Information
- View Case Status History
- Linked/Associated Cases
- Genogram/Ecomap
- Case Summary

Hazards

No current Hazards have been identified

Assignment Information

Organization	Employee Name Supervisor Name	Assignment Role	Child/Youth Name
M:	Chell, Dustin	Private Provider Worker	Applin, Jaleesa
	Ibarra, Reatha		
D:	Kmieciak, Mario	IL Administrator	Makepeace, Junior
	Lepez, Galen		
	Medico, Willie		

Assignment History

javascript: submitFormFromHyperlink('/IntakeCaseSelect.do?command.do(assignmentHistory)=1&workItemType=case&workItemId=2962397&workItemAttribute=OPEN')

- **Scroll to the bottom** of Assignment History page
- Click **Add** button

Ibarra, Reatha	Thackaberry, Fabian	Case Manager 2	Private Provider Worker	04/01/2016	04/01/2016	Applin, Jaleesa
Midkiff, Ellis	Ehrenfeld, Yelena	Case Manager 4	SS Custody Worker	10/16/2015		Applin, Jaleesa
Langrum, Sanda	Ibarra, Reatha	Program Coordinator	Private Provider Worker	09/01/2015	04/01/2016	Applin, Jaleesa
Konefal, Hans	Ibarra, Reatha	Program Coordinator	Private Provider Worker	08/10/2015	01/09/2016	Makepeace, Junior
Kmieciak, Mario	Lepez, Galen	Job Class Not Available	IL Administrator	06/18/2015		Makepeace, Junior
Medico, Willie	Merrow, Greg	Case Manager 4	EFCS Worker	05/26/2015		Makepeace, Junior
Thackaberry, Fabian	Rhynes, Yvette	Case Manager 2	Private Provider Worker	05/22/2015	08/10/2015	Makepeace, Junior
Modesto, Elicia	Ehrenfeld, Yelena	Case Manager 4	SS Custody Worker	03/20/2015	10/16/2015	Applin, Jaleesa
Ibarra, Reatha	Thackaberry, Fabian	Case Manager 2	Private Provider Worker	03/20/2015	09/01/2015	Applin, Jaleesa

10 items per page 1 - 10 of 15 items

- **Add Assignment** page
- Assign To: **Enter Last Name, First Name Highlight the correct name** (This is a required field)
- Assignment Begin Date: **MM/DD/YYYY** (This is a required field and can be dated from the date assigned to designee if not the current date)
- Assignment End Date: Only used when ending a Worker assignment within a case
- Assignment Role: **Select Private Provider Worker** in drop down box (This is a required field)
- Child/Youth: **Select Child/Youth** in drop down box

Note: Click the green (+) sign to add all youth from the case to be assigned to the private provider worker as needed

- Click the **Save** button

The screenshot shows the 'Add Assignment' form in the TFACTS system. The form is titled 'Add Assignment' and is located within the 'Case Overview > Assignment History' section. The form fields are as follows:

- Assign To:** Freelove, Shanna
- Assignment Begin Date:** 04/01/2016
- Assignment End Date:** (empty)
- Assignment Role:** Private Provider W...
- Child/Youth:** Applin, Jaleesa

A red box highlights the 'Assign To', 'Assignment Begin Date', and 'Assignment End Date' fields. A green plus sign is next to the 'Child/Youth' dropdown menu. The 'Save' button is highlighted with a red box. The page header includes 'TRN' and navigation links like 'home', 'search', 'incident reporting', 'help & training', 'customer care', and 'log off'. The footer includes 'HOME', 'HELP & TRAINING', 'PRIVACY & SECURITY', and the URL '/administration/assignment\_add.jsp'.

# TFACTS Storyboard • Case Assignment for Private Provider Supervisors

- **Private Provider Worker is assigned** in the assignment history
- Click **Save** button

The screenshot shows a web browser window with the URL <https://trn-class1.dcs.tn.gov/AssignmentAddModify.do>. The page displays a case overview for Case ID 2962397, Case Name: Applin, Tobie, Case Status: Open, and Organization: Shelby Region. Below this is an 'Assignment History' table with columns: Employee Name, Supervisor, Supervisor Job, Assignment Role, Begin Date, End Date, and Child/Youth. The first row is highlighted in red, showing Shanna Freelove assigned as a Private Provider Worker to Applin, Jaleesa, starting on 04/01/2016. At the bottom of the page, the 'Save' button is highlighted with a red box.

Employee Name	Supervisor	Supervisor Job	Assignment Role	Begin Date	End Date	Child/Youth
Freelove, Shanna	Ibarra, Reatha	Program Coordinator	Private Provider Worker	04/01/2016		Applin, Jaleesa
Ibarra, Reatha	Thackaberry, Fabian	Case Manager 2	Private Provider Worker	04/01/2016	04/01/2016	Applin, Jaleesa
Chell, Dustin	Ibarra, Reatha	Program Coordinator	Private Provider Worker	04/01/2016		Applin, Jaleesa
Midkiff, Ellis	Ehrenfeld, Yelena	Case Manager 4	SS Custody Worker	10/16/2015		Applin, Jaleesa
Langrum, Sanda	Ibarra, Reatha	Program Coordinator	Private Provider Worker	09/01/2015	04/01/2016	Applin, Jaleesa
Konefal, Hans	Ibarra, Reatha	Program Coordinator	Private Provider Worker	08/10/2015	01/09/2016	Makepeace, Junior
Kmiecik, Mario	Lepez, Galen	Job Class Not Available	IL Administrator	06/18/2015		Makepeace, Junior
Medico, Willie	Merrow, Greg	Case Manager 4	EFCS Worker	05/26/2015		Makepeace, Junior
Thackaberry, Fabian	Rhynes, Yvette	Case Manager 2	Private Provider Worker	05/22/2015	08/10/2015	Makepeace, Junior
Ibarra, Reatha	Thackaberry, Fabian	Case Manager 2	Private Provider Worker	03/20/2015	09/01/2015	Applin, Jaleesa

- Private Provider Worker is displayed in Assignment Information box

The screenshot shows the 'Case Overview' page for Case ID 29, Case Name: Applin, Tobie, Case Status: Open, and Organization: Shelby Region. The 'Assignment Information' section contains a table with columns: Organization, Employee Name, Supervisor Name, Assignment Role, and Child/Youth Name. The table lists several assignments, including Shanna Freelove as a Private Provider Worker assigned to Applin, Jaleesa.

Organization	Employee Name	Supervisor Name	Assignment Role	Child/Youth Name
Me	Chell, Dustin	Ibarra, Reatha	Private Provider Worker	Applin, Jaleesa
Me	Freelove, Shanna	Ibarra, Reatha	Private Provider Worker	Applin, Jaleesa
DC	Kmiecik, Mario	Lepez, Galen	IL Administrator	Makepeace, Junior
Sh	Medico, Willie	Merrow, Greg	EFCS Worker	Makepeace, Junior
Sh	Midkiff, Ellis	Ehrenfeld, Yelena	SS Custody Worker	Applin, Jaleesa

- Case is now **assigned** to the additional Private Provider Worker

TRN | home | search | incident reporting | help & training | customer care | log off  
Logged In: Ibarra, Reatha [ Meritan Inc ]

Home | Case | Resource | Financial | Administration  
Workload | Desktop | Calendar | Approvals | help

Ibarra, Reatha | Viewing for Freelove, Shanna | Shanna's Work (0) | Reassign | End

Type	ID	Name	Assignment Role
Ongoing Case	2962397	Applin, Jaleesa	Private Provider Worker

Freelove, Shanna (1)

10 items per page | 1 - 1 of 1 items

Continue to the next sub topic.

## Ending a Private Provider Worker Assignment

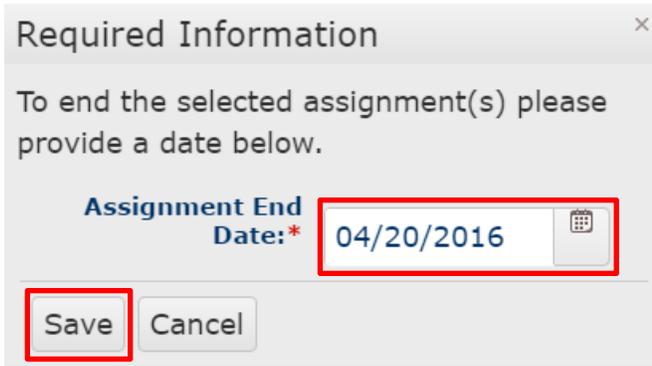
This section demonstrates ending a Private Provider Worker assignment when there is more than one Private Provider Worker assigned.

- Locate **Ongoing Case**
- **Highlight** Ongoing Case
- Click **End** button

The screenshot shows the TFACTS interface. At the top, there is a navigation bar with links for home, search, incident reporting, help & training, customer care, and log off. The user is logged in as Ibarra, Reatha [ Meritan Inc ]. Below the navigation bar, there are tabs for Home, Case, Resource, Financial, and Administration. The 'Case' tab is selected, and the 'Workload' sub-tab is active. The main content area shows a search for 'Ibarra, Reatha' and a view for 'Freelove, Shanna'. There are buttons for 'Shanna's Work (0)', 'Reassign', and 'End'. A table below shows the assignment details for 'Ongoing Case' with ID '2962397' assigned to 'Applin, Jaleesa' as a 'Private Provider Worker'. The 'End' button and the 'Ongoing Case' row are highlighted with red boxes.

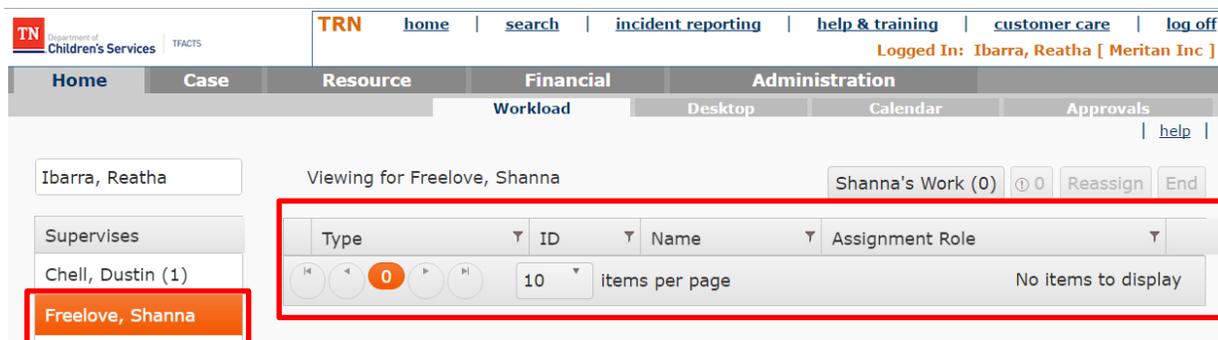
Type	ID	Name	Assignment Role
Ongoing Case	2962397	Applin, Jaleesa	Private Provider Worker

- **Required Information** message box
- Assignment End Date: **MM/DD/YYYY** (The date can't be a future date and only within the contract Begin and end date. This is a required field)
- Click **Save** button



A dialog box titled "Required Information" with a close button (X) in the top right corner. The text inside reads: "To end the selected assignment(s) please provide a date below." Below this text is a label "Assignment End Date: \*" followed by a date input field containing "04/20/2016" and a calendar icon. At the bottom of the dialog are two buttons: "Save" and "Cancel".

- Assignment has been ended and removed from the Private Provider Workload screen



A screenshot of the TFACTS application interface. The top navigation bar includes "TRN", "home", "search", "incident reporting", "help & training", "customer care", and "log off". Below this is a sub-navigation bar with "Home", "Case", "Resource", "Financial", and "Administration". The "Resource" section is active, showing "Workload" as the selected view. The main content area displays "Viewing for Freelove, Shanna" and "Shanna's Work (0)". A table with columns "Type", "ID", "Name", and "Assignment Role" is shown, but it is empty, displaying "No items to display". A search bar on the left contains "Ibarra, Reatha" and "Supervises". Below the search bar, a list of supervisors is shown: "Chell, Dustin (1)" and "Freelove, Shanna", with "Freelove, Shanna" highlighted in orange.

Continue to the next sub topic.

## Ending Assignment with only One Private Provider Worker assigned in an Open Case

- From **Workload** screen of Private Provider worker
- **Highlight** Ongoing Case
- Click **End** Button

The screenshot shows the TFACTS interface. At the top, there are navigation links: TRN, home, search, incident reporting, help & training, customer care, and log off. The user is logged in as 'Ibarra, Reatha [ Meritan Inc ]'. Below the navigation is a menu with 'Home', 'Case', 'Resource', 'Financial', and 'Administration'. Under 'Administration', there are sub-menus: 'Workload', 'Desktop', 'Calendar', and 'Approvals'. The 'Workload' sub-menu is active. The main content area shows 'Viewing for Chell, Dustin' and 'Dustin's Work (0)'. There are 'Reassign' and 'End' buttons. Below this is a table with columns: 'Supervises', 'Type', 'ID', 'Name', and 'Assignment Role'. The table has one row highlighted in orange: 'Chell, Dustin (1)', 'Ongoing Case', '29', 'Applin, Jaleesa', and 'Private Provider Worker'. The 'End' button is highlighted with a red box.

- **Required Information** message box
- Assignment End Date: **MM/DD/YYYY** (The date can't be a future date and only within the contract Begin and end date. This is a required field)
- Click **Save** button

The screenshot shows a 'Required Information' dialog box. The text inside says: 'To end the selected assignment(s) please provide a date below.' Below this is a label 'Assignment End Date: \*' followed by a text input field containing '04/20/2016' and a calendar icon. The 'Save' button is highlighted with a red box.

- Data Validation error box displays above the workload screen: **The work item must maintain at least one active assignment**
- This agency has an active placement assignment so **there must be at least one Private Provider Worker or Supervisor assigned in the case**
- Will have to reassign to another worker in order to end this workers assignment

# TFACTS Storyboard • Case Assignment for Private Provider Supervisors

TRN home | search | incident reporting | help & training | customer care | log off  
Logged In: Ibarra, Reatha [ Meritan Inc ]

Home Case Resource Financial Administration  
Workload Desktop Calendar Approvals help

**Please correct the following data validation errors:**

- The work item must maintain at least one active assignment.

Ibarra, Reatha Viewing for Chell, Dustin Dustin's Work (0) Reassign End

Supervises	Type	ID	Name	Assignment Role
Chell, Dustin (1)	Ongoing Case	2962397	Applin, Jaleesa	Private Provider Worker
Freelove, Shanna				

10 items per page 1 - 1 of 1 items

**You have completed this storyboard.**