



Storyboard

Document Storage – Linking to Events

The Document Storage system provides a centralized location to view documents and upload all documents related to children and families DCS serves. This storyboard demonstrates linking a document from an Event Type and from a Person Home Page Documents link to an Event Type.

Table of Contents

Linking a Document from an Event Type.....	2
Document Name.....	2
CPS Intake.....	2
SIU / CPSI / CPSA / Resource Linkage.....	3
Resource Home – Home Study.....	4
Subsidy	5
Linking to an Event via the Person Home Page	6

Linking a Document from an Event Type

The **Document Storage Basics** storyboard provides information for working within the Documents link. This storyboard details how to get to the Documents link from each event type.

Document Name

In order to make finding an uploaded document easier, program representatives created a consistent naming format that should be used for all documents uploaded to TFACTS. Recommendations were made for both the **Document Name** on the computer and for the Document Name as listed in TFACTS **Document Name** field. It is necessary that the document name on the computer be unique as TFACTS will not allow a document to be added which has the same physical file name (name of the document on the computer) as an existing file for the selected **Document Type**, irrespective of case or person.

Document Name on Computer: **CASE ID_Effective Date (YYMMDD)_Name of Form_Provider Initials** (if Release of Information) **_1, 2, 3, etc.** (if document will be uploaded for multiple persons to create a unique file name) **Example: John Doe_180724_YV**

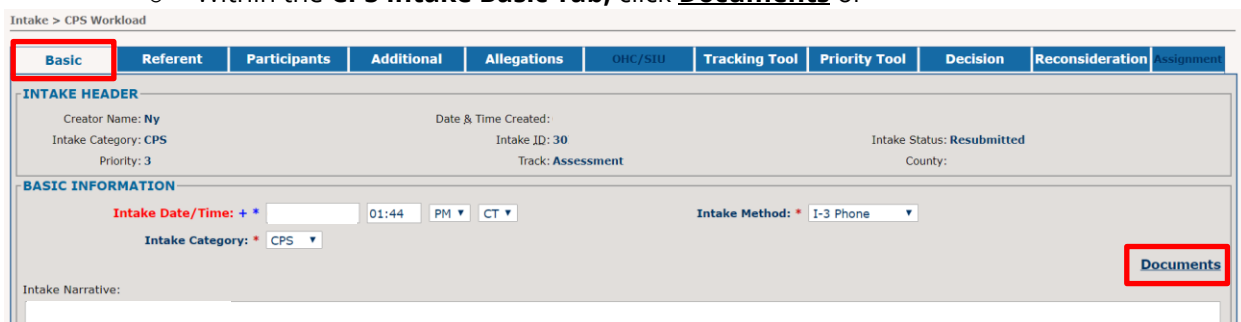
Document Name on TFACTS Document Name Field:
Name_Name of Form_Name of Provider
Example: John Doe_Release of Info_Youth Villages

CPS Intake

When a document is linked from within a **CPS Intake** the **Document Category** automatically defaults to the **CPSI_CPSA Category** and **Linked Event** field isn't displayed since the document was linked from within an Event.

Note: Only the **CPS Intake CS-0680** will be available to link to a CPS Intake and it will be linked to all Intake Participants when established in the **CPS Case**. If this document is deleted it is deleted from the Event and all Established Participants it was linked to. All other documents associated with a CPS Intake should be linked via the **Documents** link for the individual person(s) it applies to.

- Access the **CPS Intake** via the Employee **Workload** page or via the **Intake Tab CPS Workload Tab** using any of the **CPS Intake Workload Search Criteria** to narrow the search results
 - Within the **CPS Intake Basic Tab**, click **Documents** or



- From the **CPS Intake Search**, click the **document** link associated with the Intake

CPS INTAKE WORKLOAD SEARCH CRITERIA

Owner Name: Intake Status: County of Jurisdiction:
 Creator Name: Priority:
 Sort Results By:

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

CPS INTAKE WORKLOAD

[Add CPS Intake](#) [View CI Online](#)

Result(s) 1 to 1 of 1 Page 1 of 1

	Intake ID	Intake Name	Intake Date/Time	Creator Name Owner Name	Intake Status	Priority County of Jurisdiction	
select report	30	Br		Nygaard, Sarah	Resubmitted	3	document

[Add CPS Intake](#) [View CI Online](#)

SIU / CPSI / CPSA / Resource Linkage

The **Document Category** automatically defaults to the correct **Category** and the **Linked Event** field isn't displayed since the document was linked within an Event.

Note: Only the CPS Case Summary and Classification Decision of Child Abuse/Neglect Referral CS-0740 will be available to link to a CPS Case and it will be linked to all Investigation Persons when established in the **CPS Case**. If this document is deleted it is deleted from the Event and all Established Participants it was linked to. All other documents associated with a CPS case should be linked via the Documents link to the individual person(s) it applies to.

Access the investigation via the Employee **Workload** page or via a **Case Search**

- Click **Investigation Topics**
- Click **Documents**

Case > Workload > Investigation

Investigation Topics

Investigation Header:

Investigation ID: 27 Investigation Name: Wj1 Investigation Status: Open Organization:
 Priority: 1 Response Due Date/Time: 07/11/2016 07:43 PM (CT) Track: Investigation

Topic	Status
Linked Intakes	Count of Linked Intakes=1
Investigation Persons	Count of Persons/Participants=3/3
Case Recordings	Count of Case Recordings=0
Allegations/Classifications	Count of Allegations/Classified Allegations=2/0
Forms/Reports	Count of Forms/Reports=0
Extension Requests	Count of Extension Requests=0
Due Process	Count of Due Processes=0
Documents	Count of Documents Scanned=0
Checklists	Count of Checklists=0
Track Change	Track Not Changed
Link Investigation to Case	Case ID: 241
Assessments	Count of Assessments=0

[Close](#) [Approval](#)

Continue to next sub topic

Resource Home - Home Study

The **Document Category** automatically defaults to the correct **Category** and the **Linked Event** field isn't displayed. Documents linked are automatically linked to the Resource Parent and Resource Co-Parent. When a document is deleted from the Event it also deletes from the persons it was linked to.

- Access the **Resource Home** via the Employee **Workload** page or via a **Resource Search**
- Click **Home Study**

Resource Overview

Resource Name: Bri
 Type: DCS Resource Home
 Resource ID: 271
 Primary Address:

Organization: Regular
 Sub-Type: Approval Past Due
 Status: Primary Contact:
 Approval Begin Date: 08/09/2015
 Approval End Date: 08/08/2017
 Approved Capacity:
 Gender:

Resource Actions
 Maintain Resource Information

Assignment Information

Organization	Employee Name	Supervisor Name	Assignment Role
			Resource Parent Support Specialist

Resource Alerts

Alert Message

10 Items per page No items to display

- Click **document** for the **Home Study** to link documents to

Resource Header

Resource Name: Bri ID: 271 Type: DCS Resource Home Sub-Type: Regular

Maintain Home Study History

Home Study Type	Begin Date	Disposition	Approval Date	Approval End Date	Organization
Reassessment	05/07/2018	Pending			document
Reassessment	06/15/2015	Approved	08/09/2015	08/08/2017	document
Initial	03/22/2013	Approved	08/09/2013	08/08/2015	document

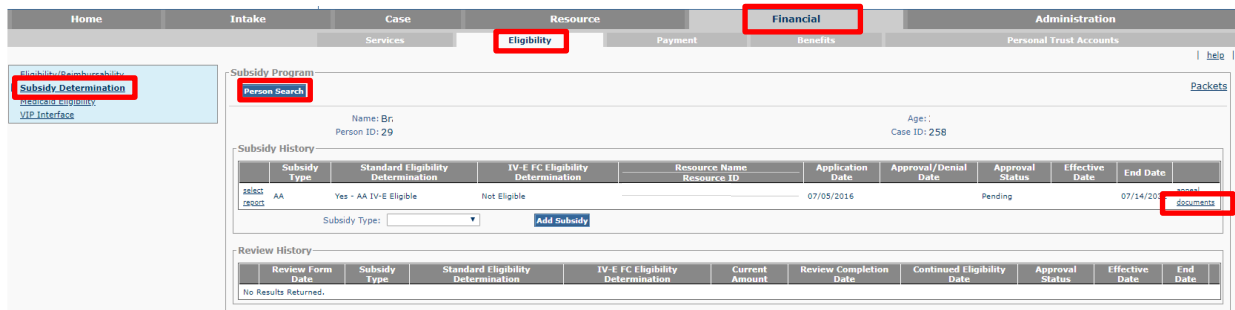
Continue to next sub topic

Subsidy

Subsidy is both an Event and a Packet type. This information covers Subsidy as an Event. All the basic **Document Storage** processes presented in the **Document Storage Basics** storyboard apply the same way within the **Subsidy**. When a document is deleted from the Subsidy Event it also deletes from the persons it was linked to.

Accessing the Subsidy Determination

- Click **Financial**
- Click **Eligibility**
- Click **Subsidy Determination**
- Click **Person Search**, complete search and **choose**
- Click **documents**



Continue to next sub topic

Linking to an Event via the Person Home Page

Follow the procedures outlined in the Document Storage Basics Storyboard for uploading a document.

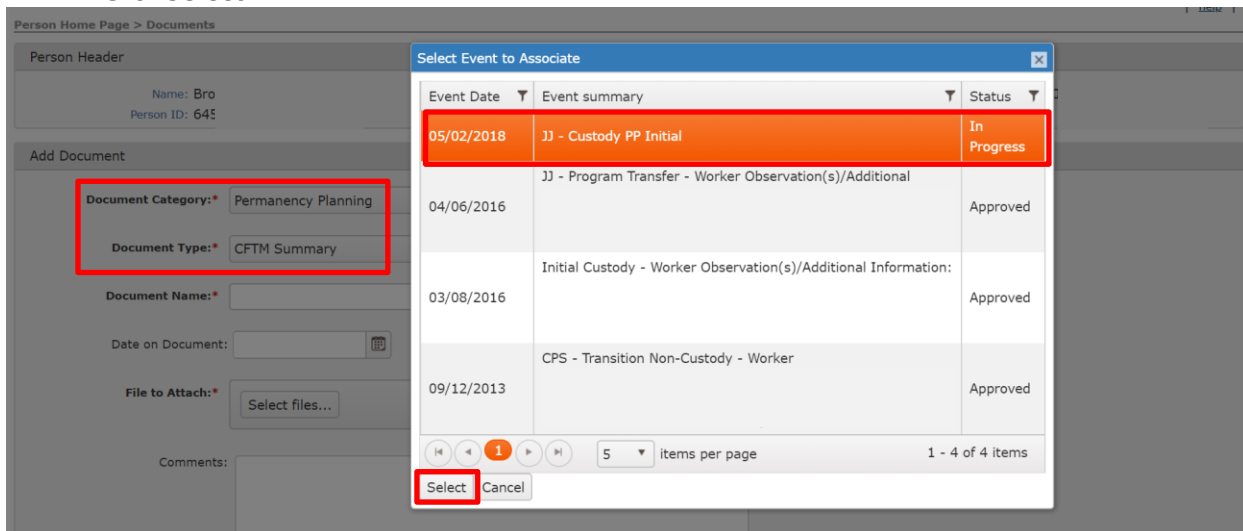
Linking a document to an **Event Type** will link the document to all participants listed in that **Event**. See the [Document Reference Table](#) for a complete list of linkable events.

- Select **Document Category***
- Select a **Document Type*** associated with an **Event Type**. A popup box will display with any available **Events** that can be linked to

Note:

- *The only document available to link to a **CPS Intake** will be the **CPS Intake CS-0680**.*
- *The only document available to link to a **CPS Case** will be the **CPS Case Summary and Classification Decision of Child Abuse/Neglect Referral CS-0740**.*
- *If linking to a **Home Study** the document will link to the Resource Parent and Resource Co-parent only.*

- Click on row to highlight the **Event** to link
- Click **Select**



- Enter the **Document Name*** (use established Naming convention)
- Enter the **Date on Document**, manually or via the calendar icon (optional)
- **File to Attach***
 - Click **Select files....** (use established Naming convention)
- Click **Save** if everything is correct. OR
- Click **Clear** to remove the linked **Event**
- Click **Change Event** to choose a different **Event**.

TFACTS Storyboard • Document Storage

The screenshot shows a web form for document storage. The form includes the following elements:

- Document Type:** A dropdown menu with "CFTM Summary" selected.
- Document Name:** A text input field.
- Date on Document:** A date picker field.
- File to Attach:** A file selection button labeled "Select files...".
- Comments:** A large text area for entering notes.
- Linked Event:** A section containing:
 - Event Date: 05/02/2018
 - Event Status: In Progress
 - Event Name: JJ - Custody PP Initial
 - Buttons: "Clear" and "Change Event"
- Save/Cancel:** Buttons at the bottom left of the form.

Red boxes in the image highlight the Document Type dropdown, Document Name field, Date on Document field, File to Attach button, the entire Linked Event section, and the Save button.

You have completed this storyboard