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TN Department of
Children's Services

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.

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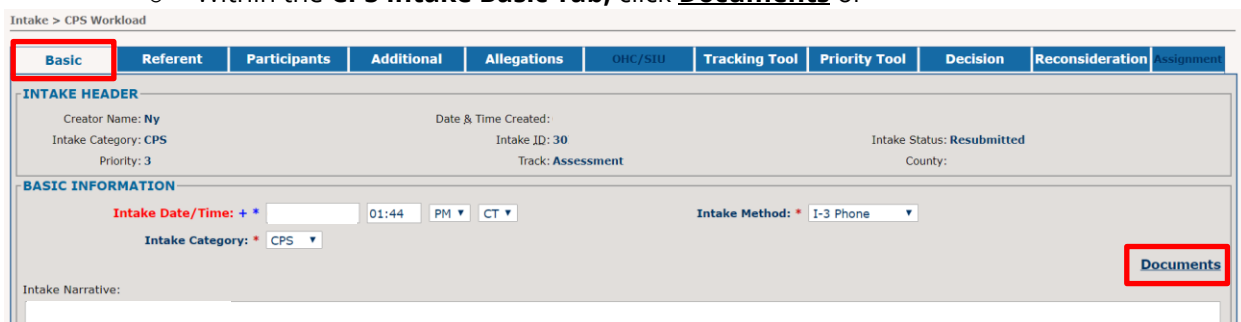
Document Name on TFACTS Document Name Field:
Name_Name of Form_Name of Provider
Example: John Doe_Release of Info_Youth Villages

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

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

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**

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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**

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

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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**
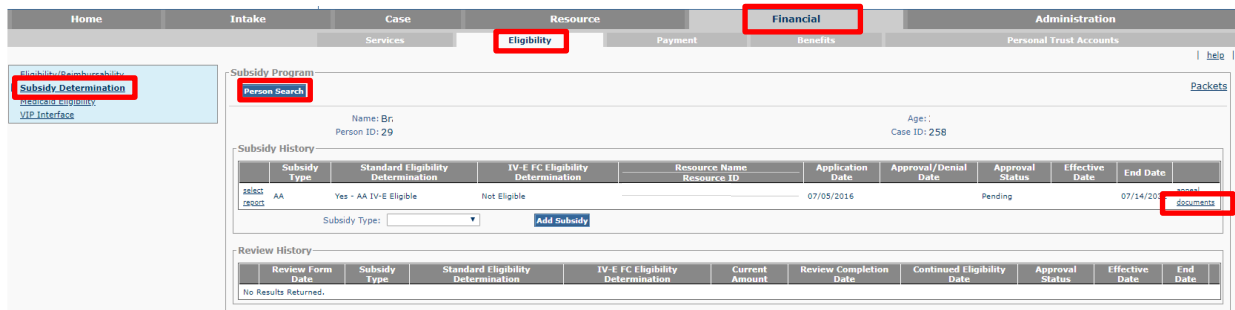
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Linking to an Event via the Person Home Page

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 <u>all</u> 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:

- o *The only document available to link to a **CPS Int**ake will be the **CPS Intake CS-0680**.*
- o *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**.*
- o *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**
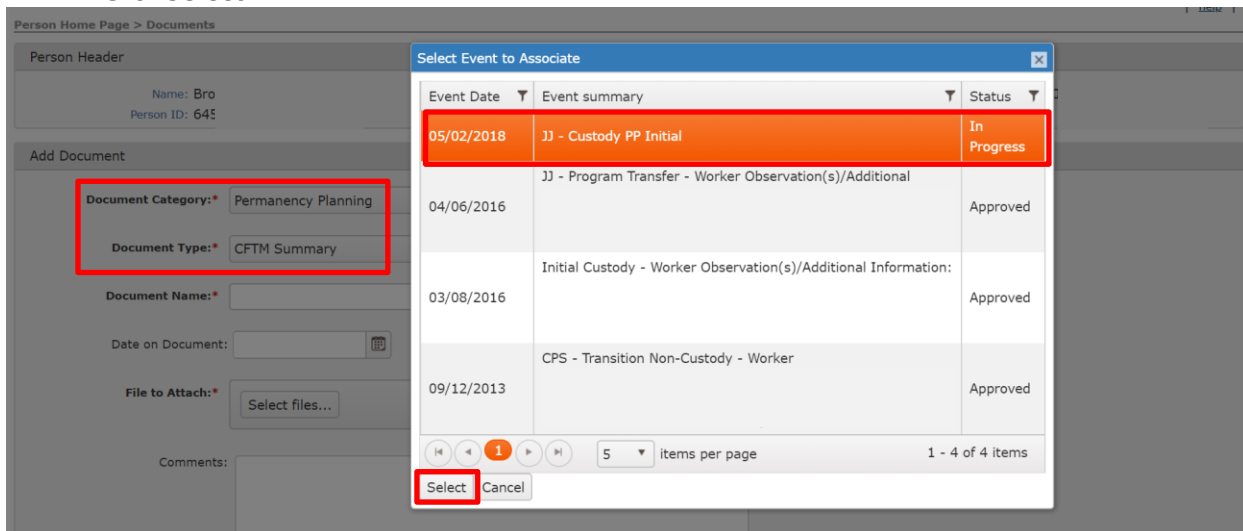
- Enter the **Document Name*** (use established Naming convention)
- Enter the **Date on Document**, manually or via the calendar icon (optional)
- **File to Attach***
  - o Click **Select files….** (use established Naming convention)
- Click **Save** if everything is correct. OR
- Click **Clear** to remove the linked **Event**
- Click **Change Event** to choose a different **Event**.

You have completed this storyboard