



Storyboard

Case Recordings – Private Provider

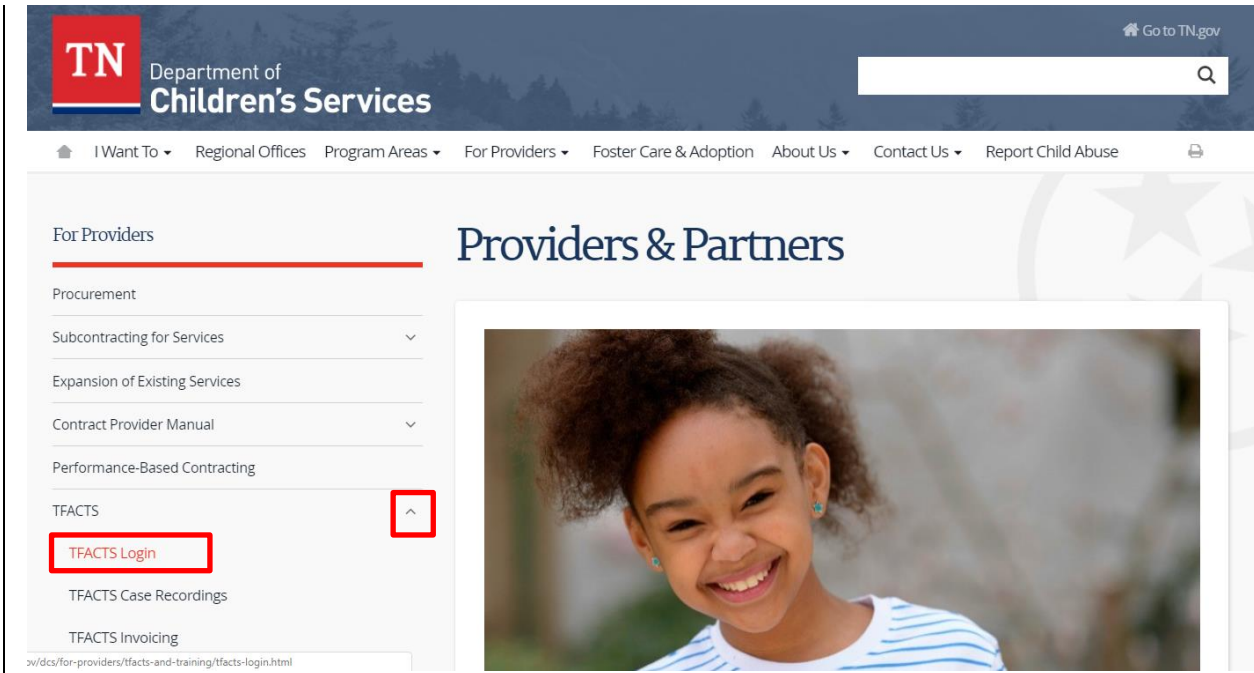
This storyboard demonstrates how to view, enter and edit Case Recording information in Family Cases for Private Providers

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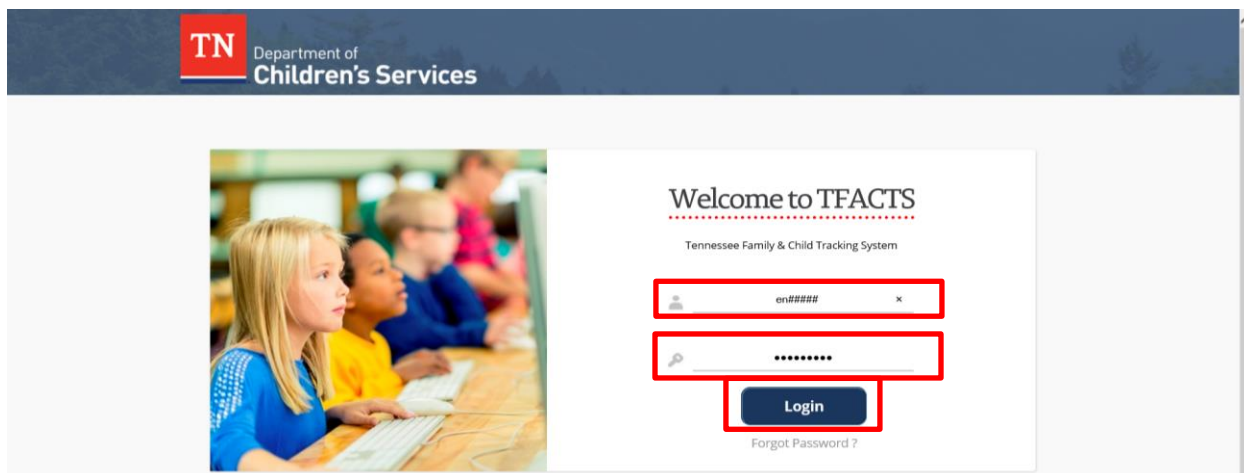
Navigate to Providers and Partners Website

- Log in to : <https://www.tn.gov/dcs/for-providers.html>
- Click the **arrow** (▶) beside **TFACTS** in the Navigation Bar
- Click **TFACTS Login**



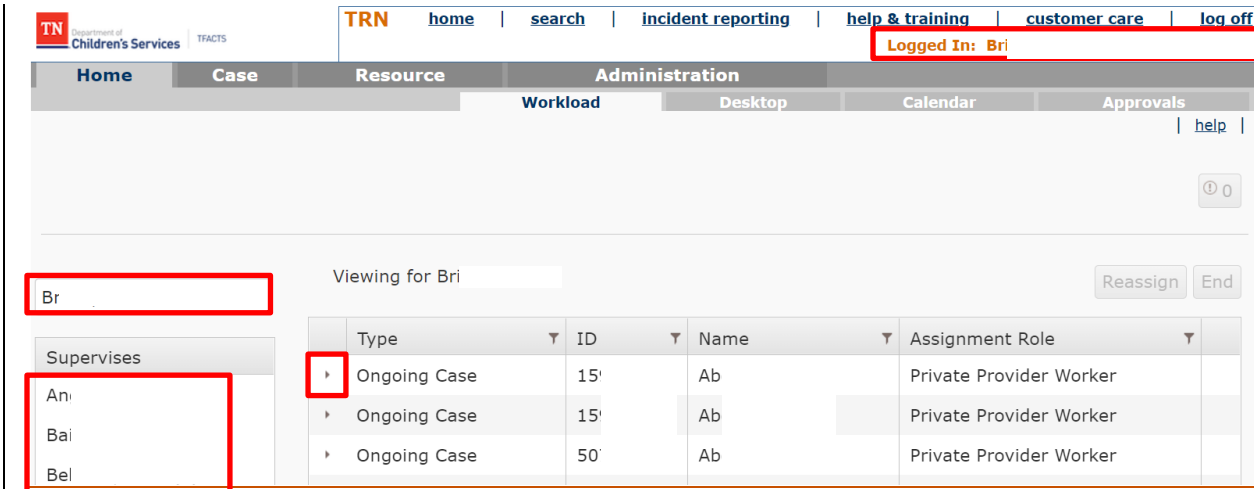
The **TFACTS Login Screen** displays

- Enter **User Name (EN#)**
- Enter **Active Directory Password**
- Click **Login**

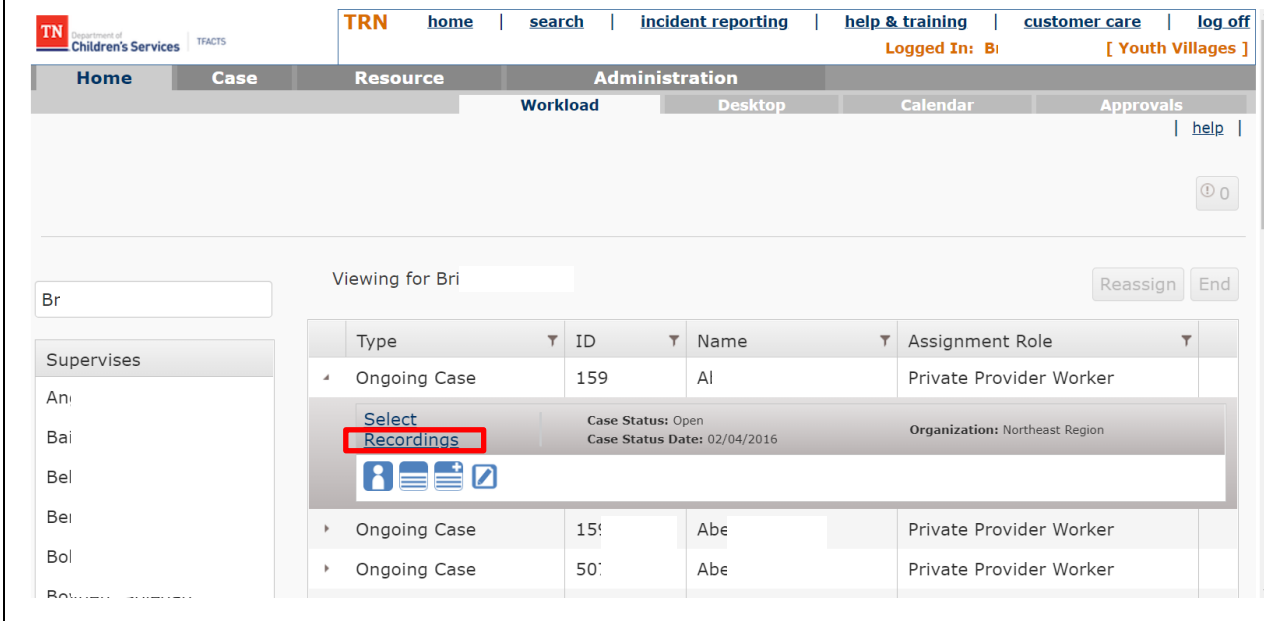


Navigate to Case Recordings

- The **TFACTS Home** screen displays all work items assigned to the employee.
 - If a Supervisor, the list of workers they supervise will display under their name.
- Click the (expand) **arrow (▶)** to the left of the case.



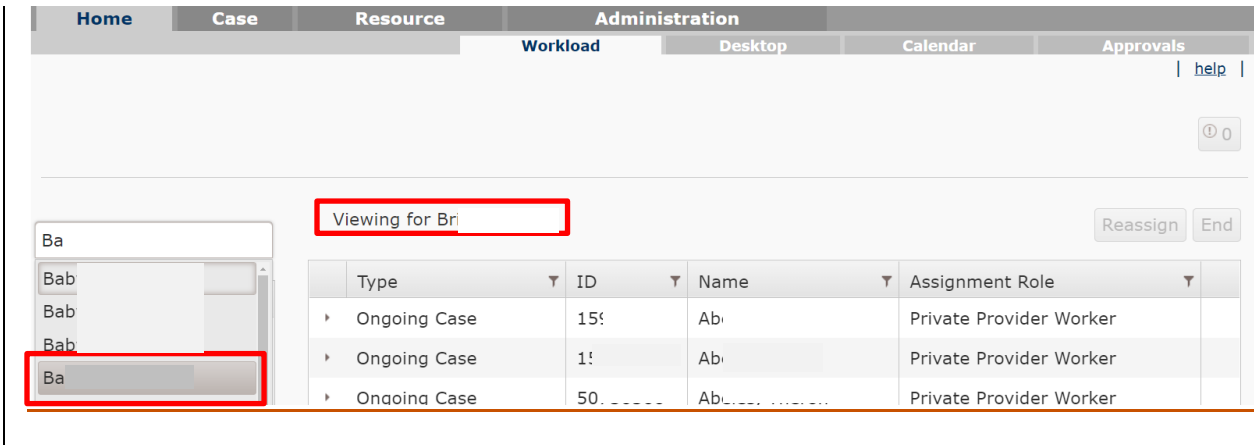
- Click **Recordings** link



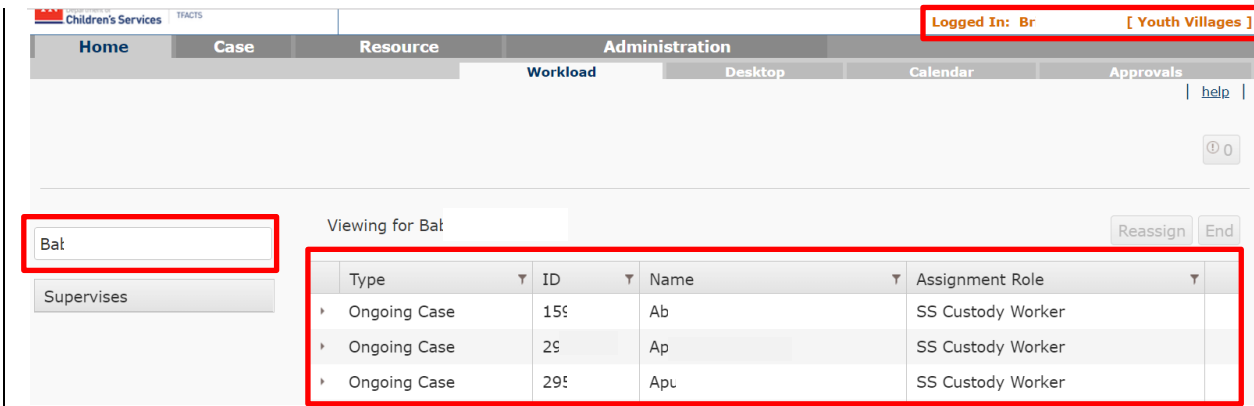
NOTE: If the work item is not assigned, there are two options to obtain access:

Option 1

- Change the **Workload** being displayed to the assigned employees in the agency
- Enter **Assigned Employees name (Last Name, First Name)** in the Viewing form fill box
- Click **Enter**

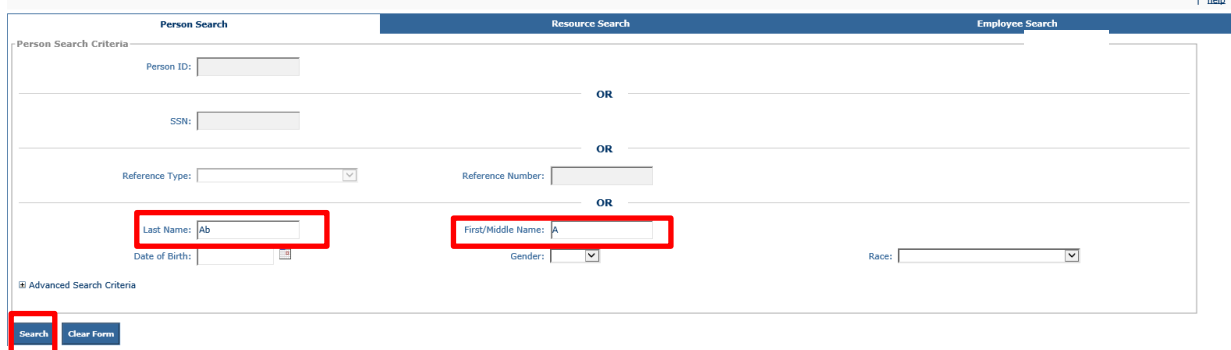


- The Assigned Employees name and workload displays



Option 2

- Complete a **Case Search** by entering the Last Name and First Name
- Click **Search**



TFACTS Storyboard – Case Recordings – Private Providers

- Results will **Display**
- Select the **Link** to select the appropriate case

Advanced Search Criteria

Person Search Results

Result(s) 1 - 50 of 250 Page 1 of 5

[AD]:Adopted, [D]:Duplicate, [E]:Employee, [EP]:Employee-Previous, [HE]:Hazard-Environment, [HR]:High Risk, [HS]:Hazard-Safety, [TBI]:Potential TBI Sex Offender Match
 [RA]:Asian, [RB]:Black/African American, [RI]:American Indian/Alaska Native, [RH]:Native Hawaiian/Other Pacific Islander, [RM]:Multi-Racial-One Race Unknown, [RU]:Unable to Determine, [RW]:White

	Person ID	Name	Address	Gender	DOB	SSN
select	264	At [RW]		Male	10/01/2003 Age: 15	
select	22	At		Male	05/01/1981 Age: 38	XXX-XX-1128
select	51	At [RB]		Male	05/01/1981 Age: 38	
select	35	At [RW]		Female	01/28/2011 Age: 8	XXX-XX-7099

- From the **Person Home Page**, Click **TFACTS History** in the person links

TN Children's Services TFACTS TRN

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

Logged In: B4 Youth Worker

Person Home Page

Person ID: 3
 Name: A
 Address:
 Phone/Contact:

Gender: Female
 DOB: 01/28/2011
 Age: 8 Yrs
 Employee: No

Person Links

[Person Profile](#)
[Person Characteristics](#)
[Monthly Summary](#)
[Packets](#)

[Education](#)
[Legal History](#)
[Military History](#)

[Health](#)
[TFACTS History](#)
[Merge History](#)

[Financial](#)
[Person Association](#)
[Assignment History](#)

[Assessment History](#)
[Documents](#)

Quick Actions:

Electronic Case File

Date	Event
03/20/2017	NOA - << No access to read details >>
select 03/08/2017	Placement
select 03/01/2017	Placement
02/28/2017	Consultation - << No access to read details >>
select 02/24/2017	Old CANS Assessment

January 2019

Su	Mo	Tu	We	Th	Fr	Sa
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Close

[/intake/intake_person_basic.jsp](#) pr011_cms_person_overview TFACTS version: 3.0053.10 (12-07-2018 09:18 AM)

TFACTS Storyboard – Case Recordings – Private Providers

- Select the (+) sign by **Case History**
- Click the Case ID **Link**

Person Overview

Person Header

Name: Abi Gender: Female DOB: 01/2
Person ID: 35 SSN: ***-**-7099 Age: 8 Yrs

TFACTS History

Case History (1)

Case ID	Case Name	Case Type	Case Status	Case Status Date	Organization
159	Matth	Ongoing	Open	02/04/2016	Northeast Region

Investigation History (2)

Associated Case History (1)

Intake History (2)

- Click **Case Recording** in the blue navigation box

Case Header

Case ID: 159430663 Case Name: Case, Is Masked Case Status: Open Organization: Northeast Region

Case Overview

Case Actions

View Case Information

View Case History

Linked/Associated Cases

Case Summary

Case Address

Hazards

Hazard Type	Person/Address
No current Hazards have been identified	

Assignment Information

Assignment History

Organization	Employee Name	Assignment Role	Child/Youth Name
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When the Case Recording Screen Opens, the options are:

- Filter for Recordings by using **Search Criteria**
- **Search** Recording
- **Add Recording**
- **Print Recordings**

Sort

Search Clear Form

Recording List

Add Recording Print

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

Close

Search Case Recordings

Note: TFACTS will only display 500 case recording records at a time. If a specific case recording can't be located, try using the additional search criteria to narrow down the results.

- Click **Search** to display all case recordings
- Enter one or more search criteria values in the **Recording Search Criteria** area to narrow search results.
 - Contact To / From Date
 - Entered by
 - Location
 - Status
 - Participant
 - Contact Type
 - Contact Method
 - Sort Results by
- Click **Search**. This will retrieve the recordings that match your search criteria.
- **Clear Form** clears the search criteria fields.

The screenshot displays the 'Recording Search Criteria' form with the following fields:

- Contact From Date:
- Contact To Date:
- Entered By:
- Status:
- Contact Type:
- Location:
- Participant:
- Contact Method:
- Sort Results By:

Buttons: **Search**, **Clear Form**

Recording List

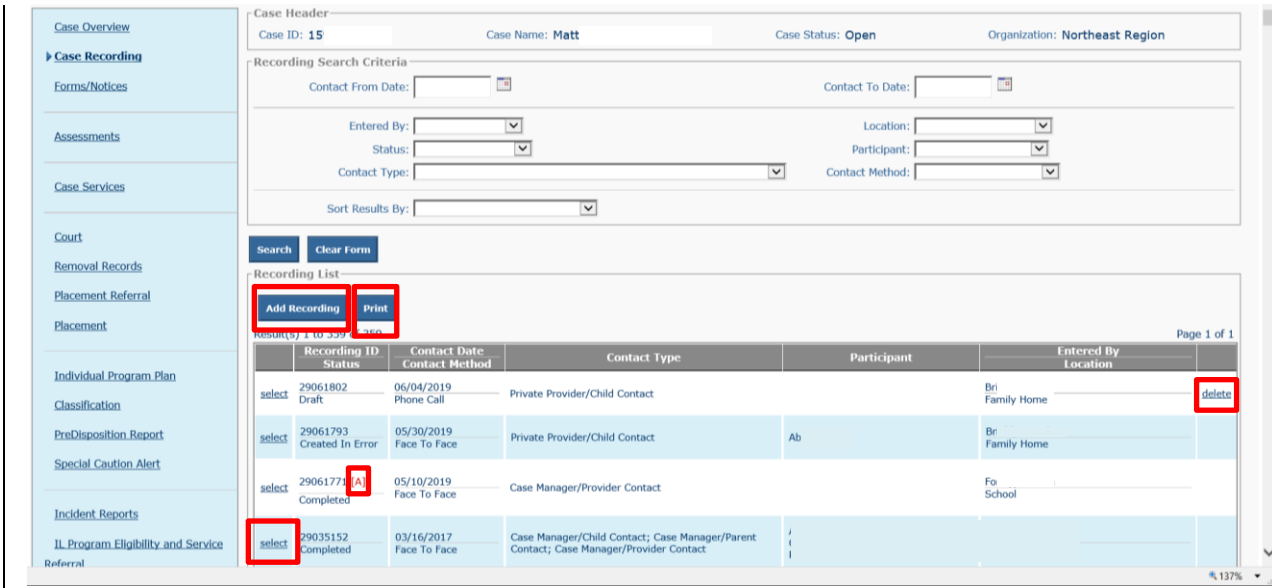
Result(s) 0

Recording ID	Contact Date	Contact Type	Participant	Entered By
Status	Contact Method			Location
Page 0 of 0				

Case Recording Options

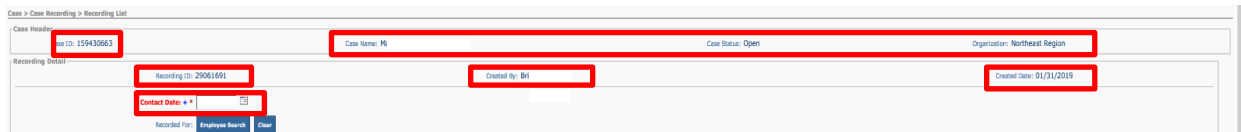
The following options work the same for all **Case Recording** types.

- **Add Recording** to create a new case recording, by opening the **Case Recording Detail** page.
- **Print** opens the print page and display the recordings retrieved in the completed search. Print all or select those specific case recordings that need to be printed.
- **Select** to view/update the details for that specific recording.
- **Delete** is enabled only for recordings in **Draft** status. Click **Delete** to delete that specific recording.
- **[A]** to the left of the recording ID indicates that a case recording has an added addendum entered.

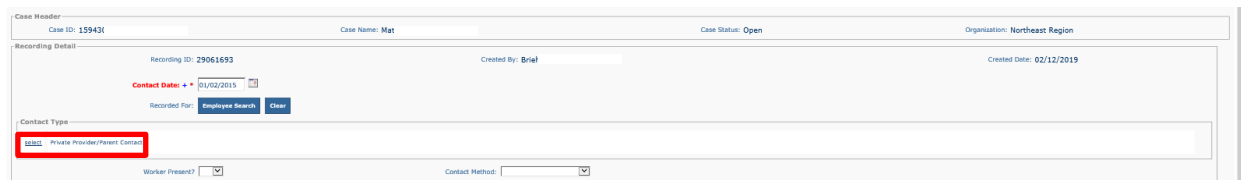


Add Case Recording

- Click **Add Recording**
- **Case Header** – displays **Recording ID number, Created By, and Created Date.**
- **Contact Date** – enter the date the contact actually occurred, this must be entered to continue entering recording details.
- **Recorded For** – if entering a recording for another employee, click **Employee Search** to search and select the employee for whom recording is being entered.



- **Contact Type** – click **Select** to choose what type of contact was made.



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- Check the appropriate box for Contact Type
- Click **Save**

Note: Once a **Contact Type** is selected, the **Employee Present** and **Contact Method** will be enabled. These fields are disabled for certain contact type selections.

Case > Case Recording > Recording List > Recording Detail

Case Header
Case ID: 159430663 Case Name: Matthews, Chelsey Grace Case Status: Open Organization: Northeast Region

Select Contact Type
Result(s) 1 to 9 of 9 Page 1 of 1

Contact Type(s)	Restriction
<input type="checkbox"/> Notation	
<input type="checkbox"/> Private Provider/Child Contact	
<input type="checkbox"/> Private Provider/Child Visit with Other Family Member/Kin	
<input type="checkbox"/> Private Provider/DCS Contact	
<input type="checkbox"/> Private Provider/Parent Contact	
<input type="checkbox"/> Private Provider/Parent-Child Visit	
<input type="checkbox"/> Private Provider/Resource Parent Contact	
<input type="checkbox"/> Private Provider/Resource Parent-Child Visit	
<input type="checkbox"/> Private Provider/Sibling Visit	

Save Cancel

HOME | HELP & TRAINING | PRIVACY & SECURITY | /case/case_recording_contact_type.jsp cm40_s04_select_contact_types TRN33 version 3.003.10 (12-07-2018 09:10 AM)

- **Worker Present** – choose **Yes** or **No**, if worker was present during contact.
- **Contact Method** – select appropriate contact method from dropdown:
 - **Attempted Phone Call**
 - **Attempted Face to Face**
 - **Correspondence**
 - **Face to Face**
 - **Phone Call**

Case Header
Case ID: 15 Case Name: Mat Case Status: Open Organization: Northeast Region

Recording Detail
Recording ID: 29 Contact Date: 01/02/2015 Created By: BR Created Date: 02/12/2019

Recorded For: Employee Search Clear

Contact Type
Private Provider/Parent Contact

Worker Present? Contact Method:

TFACTS Storyboard – Case Recordings – Private Providers

- **Location Type** - select the appropriate location from the dropdown.
Note: If **Court**, **School** or **Other** location type is selected, a description should be entered in the field provided.
- **Resource** – click to search for resource home if Resource Home is the **Location Type** selected. Click **Select** next to the appropriate search result.
- Check the **Copy To Resource Record** box if a copy of the recording needs to be added to the **Resource Home Activity Log**.
- **Available Purposes box** - highlight the appropriate purpose(s) in the box and click Add to move them to the **Selected Purposes** box; to remove, highlight and click **Remove**.

- **Add Participant** – click to select persons who participated in the contact.

Click + to expand each section

- Check the box by each person who participated in the contact.

Child Present (4)				
	Name	DOB	Role	Social, Medical & Educational Needs Addressed?
<input type="checkbox"/>	Abi	01/28/2011	Child Present	<input type="checkbox"/>
<input type="checkbox"/>	Peni	04/01/2016	Child Present	<input type="checkbox"/>
<input type="checkbox"/>	Peni	09/09/2014	Child Present	<input type="checkbox"/>
<input type="checkbox"/>	Pena	11/06/2007	Child Present	<input type="checkbox"/>
Case Member (13)				
	Name	DOB	Role	
<input type="checkbox"/>	Abe	01/28/2011	Case Member	
<input type="checkbox"/>	Abi	02/17/1992	Case Member	
<input type="checkbox"/>	Glov	09/13/1971	Case Member	

- **Child Present section** displays a list of children to select from (check the box).
Note: Child might not show up as a Child Present if they are missing a Date of Birth in

TFACTS Storyboard – Case Recordings – Private Providers

TFACTS.

- **(SME) Social, Medical, & Educational Needs Addressed?** - Click **Yes** or **No** from the dropdown as it applies, if one or more of these were discussed during the visit.

Your data has been saved. close confirmation

Case > Case Recording > Recording List > Recording Detail

Case Header

Case ID: 15 Case Name: Mat Case Status: Open Organization: Northeast Region

Select Person

Child Present (4)

<input type="checkbox"/>	Name	DOB	Role	Social, Medical & Educational Needs Addressed?
<input type="checkbox"/>	Abe	01/28/2011	Child Present	<input type="text"/>
<input type="checkbox"/>	Pen	04/01/2016	Child Present	<input type="text"/>
<input type="checkbox"/>	Peni	09/09/2014	Child Present	<input type="text"/>
<input type="checkbox"/>	Per	11/06/2007	Child Present	<input type="text"/>

Case Members section displays a list persons from the Case Members screen in the family case; click checkbox to select.

Case Member (13)

<input type="checkbox"/>	Name	DOB	Role
<input type="checkbox"/>	Ab	01/28/2011	Case Member
<input type="checkbox"/>	Abi	02/17/1992	Case Member
<input type="checkbox"/>	G	09/13/1971	Case Member
<input type="checkbox"/>	Hott	10/27/1984	Case Member

- **Associated Person section** displays a list of persons from the Associated Persons screen in the family case; click checkbox to select

Associated Person (16)

<input type="checkbox"/>	Name	DOB	Role
<input type="checkbox"/>	Abal	01/28/2011	Service Provider
<input type="checkbox"/>	Ch		CASA
<input type="checkbox"/>	Cinb	10/09/1952	Resource Parent
<input type="checkbox"/>	Cintr	06/23/1957	Resource Parent
<input type="checkbox"/>	Cool		Service Provider
<input type="checkbox"/>	Freux		Guardian Ad Litem
<input type="checkbox"/>	KRl		Parent Attorney
<input type="checkbox"/>	Lar		Service Provider
<input type="checkbox"/>	Nai		DCS Supervisor
<input type="checkbox"/>	Oit		CPS Worker
<input type="checkbox"/>	Pep	04/25/1973	Resource Parent
<input type="checkbox"/>	Pey		Grandparent

- **Assigned Employee section** displays a list of persons assigned to a work item in the family case at the date/time of the Contact Date; click checkbox to select.
- After all persons are selected, Click **Save**

Assigned Worker (3)

<input type="checkbox"/>	Name	DOB	Role
<input type="checkbox"/>	Bal		--- Custody Worker
<input type="checkbox"/>	Brie	12/19/1987	Private Provider Worker
<input type="checkbox"/>	Pavi		ICPC Administrator

Person (0)

Narrative Details - enter meeting notes.

Narrative Details

(Note: Provide a detailed summary of purpose, interactions, discussions, observations, assessment of progress, agreements, decisions and next steps. Refer to HELP for further instructions on documentation.)

Narrative:

Expand Spell Check Clear 32000

Status: * Draft

Apply Save Cancel

HOME | HELP & TRAINING | PRIVACY & SECURITY | /case/case_recording_details.jsp cm40_s02_create_case_recording_details TRN33 version 3.003.10 (12-07-2018 09:10 AM)

- Change Status to Completed once recording is finished. This completes your case recording and no changes can be made

Narrative Details

(Note: Provide a detailed summary of purpose, interactions, discussions, observations, assessment of progress, agreements, decisions and next steps. Refer to HELP for further instructions on documentation.)

Narrative:

Narrative Type: Original Entry Date/Time: 07/08/2019 14:26:07 Entered By: Br

storyboarding

Expand Add Addendum

Status: * Completed Completed Date: 07/08/2019 Completed By: Br

Close Mark In Error

HOME | HELP & TRAINING | PRIVACY & SECURITY | /case/case_recording_details.jsp cm40_s02_create_case_recording_details TRN33 version 3.003.10 (12-07-2018 09:10 AM)

Status types:

- **Draft** – displays when the case recording is still in progress and changes can be made
- **Completed** – displays when the case recording is complete and no changes can be made
- **System completed** – displays when the case recording has been in Draft status for 30 days or more.
- **Created in Error** – displays when the recording has been marked in error.

Continue to the Next Topic

Add an Addendum.

An Addendum can be added to a case recording in Completed status, if needed.

- Select the **Case Recording** that needs an Addendum
- Select **Add Addendum**.

Note: An addendum can only be added to a Completed Case Recording.

Narrative Details
 (Note: Provide a detailed summary of purpose, interactions, discussions, observations, assessment of progress, agreements, decisions and next steps. Refer to HELP for further instructions on documentation.)

Narrative:
 Narrative Type: Original Entry Date/Time: 07/08/2019 14:26:07 Entered By: Brie
 storyboarding

Expand **Add Addendum**

Status: Completed Completed Date: 07/08/2019 Completed By: Brie, Patrick

Close Mark In Error

HOME | HELP & TRAINING | PRIVACY & SECURITY | /case/case_recording_details.jsp cm40_s02_create_case_recording_details TRN33 version 3.003.10 (12-07-2018 09:10 AM)

- Enter the addendum notes into the Addendum Narrative box.
- Click **Save**

TRN Child's Services TFACTS TRN

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

Case > Case Recording > Recording List > Recording Detail

Case Header
 Case ID: 150 Case Name: Mat Case Status: Open Organization: Northeast Region

Addendum Detail
 Existing Narrative:
 Narrative Type: Original Entry Date/Time: 03/13/2017 14:19:14 Entered By: B
 Removed from view

Expand

Addendum Narrative:

Expand Spell Check Clear 100000

Save Cancel

HOME | HELP & TRAINING | PRIVACY & SECURITY | /case/recording_addendum.jsp cm40_s01_edit_recording_addendum TRN33 version 3.003.10 (12-07-2018 09:10 AM)

- A red (A) will now display next to the Recording ID showing that additional information was added to the completed case recording.

Case Services

Court

Removal Records

Placement Referral

Placement

Individual Program Plan

Classification

PreDisposition Report

Special Caution Alert

Sort Results By: [v]

Search Clear Form

Recording List

Add Recording Print

Result(s) 1 to 357 of 357 Page 1 of 1

	Recording ID	Status	Contact Date	Contact Method	Contact Type	Participant	Entered By	Location
select	290617	(A) Completed	05/10/2019	Face To Face	Case Manager/Provider Contact	Fon Sch		
select	29035152	Completed	03/16/2017	Face To Face	Case Manager/Child Contact; Case Manager/Parent Contact; Case Manager/Provider Contact	A It	Bu Fa	

Mark Case Recording In Error

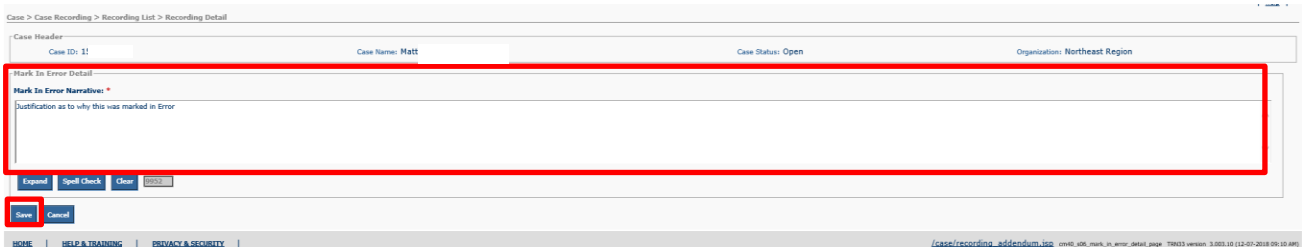
A case recording in Completed status can be Marked in Error, if entered incorrectly.

- Locate the recording
- Click **Mark in Error** at the bottom of the recording screen

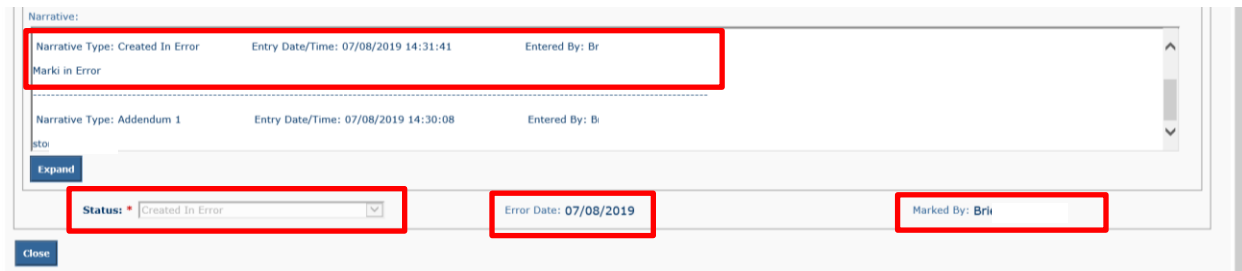
Note, only the employee that entered the case recording has the option to Mark In Error



- **Recording Detail** page displays.
- Case ID, Case Name, Case Status and Organization are listed
- Under **Mark In Error Narrative**, enter a justification as to why the recording was in error. Click **Save**



- The **Status** of the case recording has reverted to **Created in Error**. The **Error date** is displayed along with the **person that marked the recording in Error**.



You have completed this storyboard