Department of Children's Services

Storyboard

Document Storage Basics

This storyboard demonstrates the basics of the Document Storage System which provides a centralized location to view and upload all documents.

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Person Home Page

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.

File Name (name of the document on the Computer)

- This name must be unique. Once the document is uploaded in TFACTS this name does not display, but it is how TFACTS identifies the document behind the scenes.
- TFACTS will generate an error message if attempting to upload another document with the same file name as one used previously. The error states, "A document already exists with this File name. Please rename and try again."
- The approved naming convention for the File name: Child First Name_Child Last Name_Form Name_Date
    - Example: **Flavia_Deluce_CFTM_Summary_02052019** or **Flavia_Deluce_Drug Test Reports_11122020**
    - If a file name error occurs when attempting to upload a document, change the name of the file on your computer by adding an underscore and a number.
    - Example: **Flavia_Deluce_CFTM_Summary_02052019_1** or **Flavia_Deluce_Drug Test Reports_11122020_1**

Document Name (name of the document in TFACTS)

- The file will be uploaded from the Persons Documents link. TFACTS knows the document belongs to that person and to any others that the document is associated with.
- The approved naming convention for the Document Name (name in TFACTS) is simply the Form Name_Date
    - Example: **Case Summary_02052019** or **Life Skills Assessment_02052019 or Drug Test Reports 1112200**

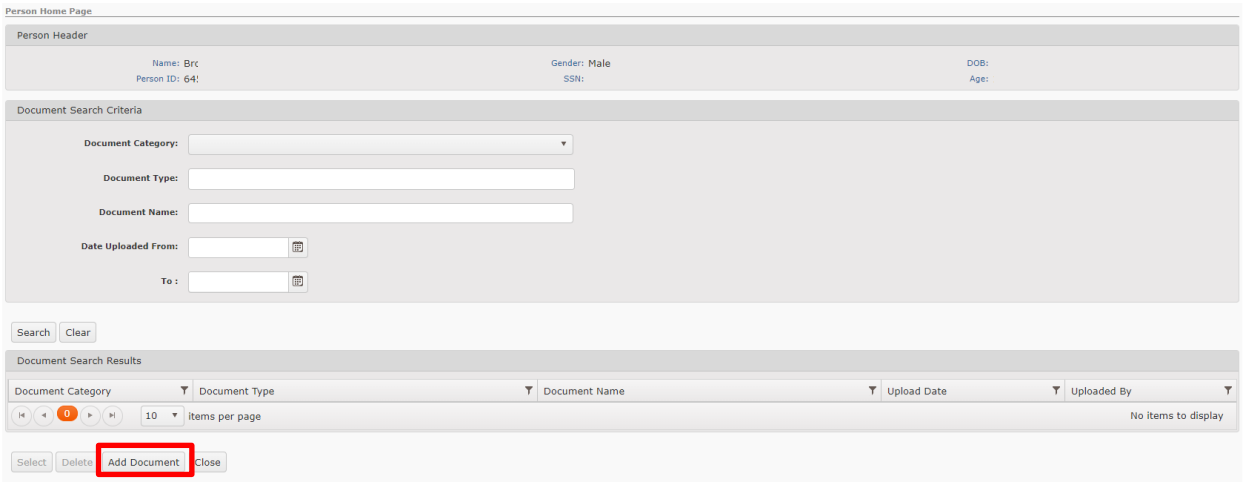
Note: Think of it this way-- Your computer houses the file names, TFACTS is the file drawer. You cannot have two files with the same names in the file drawer.

Adding a Document

New documents will be uploaded into TFACTS and associated to a person via the **Person Home Page.** Access the **Person Home Page** via a Person Search, Workload Page> Person Icon, or clicking on a Person Name link.

- Click **Documents**

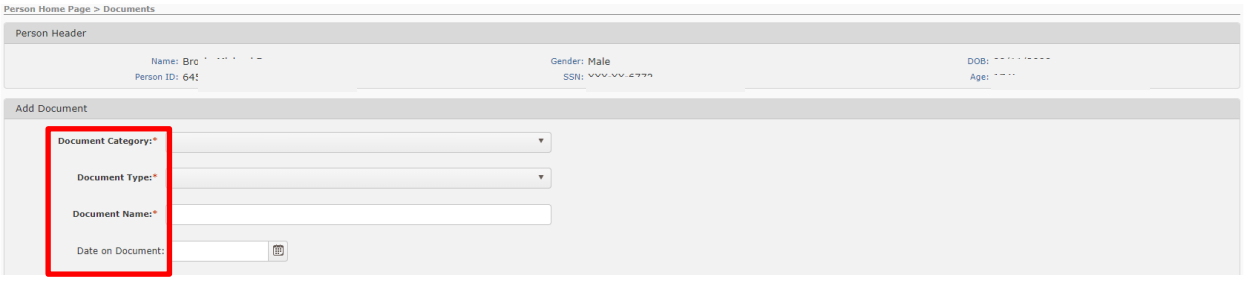
- **Document Search** Criteria screen displays
- Click **Add Document**



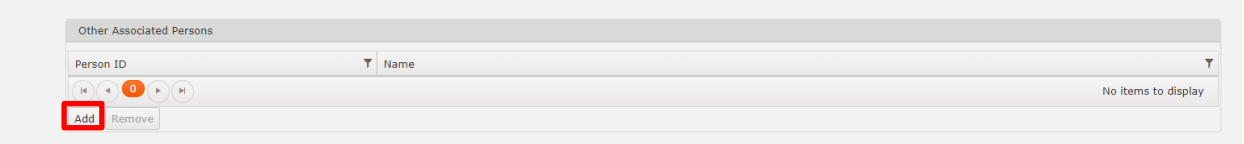
Add Document screen displays

- Select the **Document Category*** via the dropdown
- Select the **Document Type*** via the dropdown (list populates based on Document Category selected)
- Enter the **Document Name*** (use established Name convention from page 2)
- Enter the **Date on Document**, manually or via the calendar icon (optional)

Note: Fields with a red asterisk are required fields.

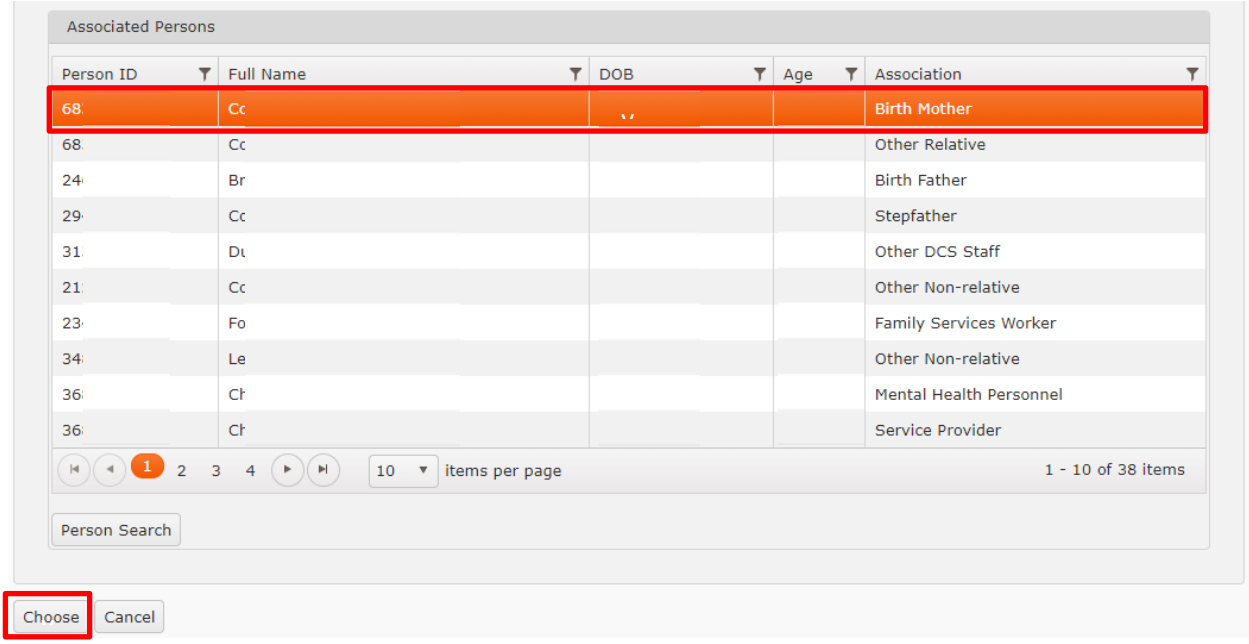


- Add **Other Associated Persons –** there are 3 methods
- Click **Add**



- **Associated Persons** screen **–** add **Associated Persons**
  - Click to highlight appropriate person(s) displayed – these are person(s) already associated to the person in focus
  - Click Choose.

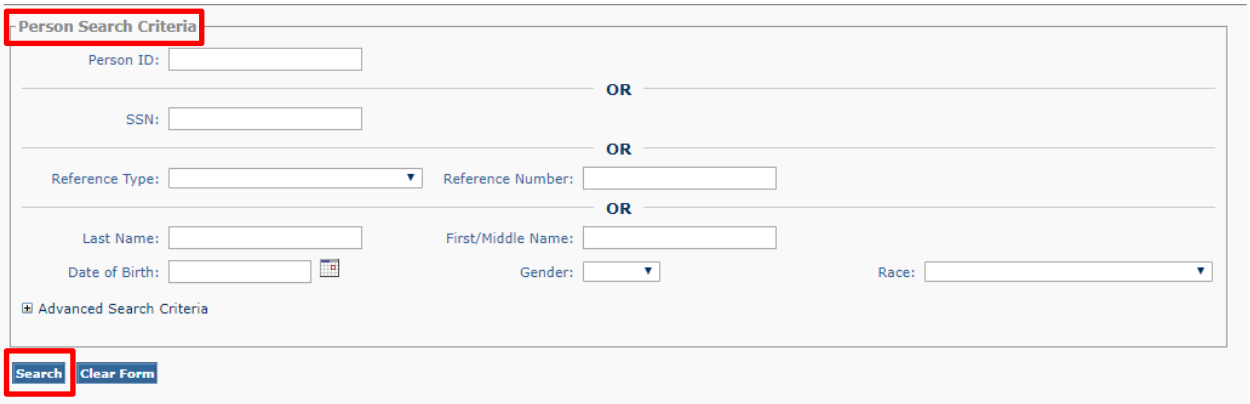
  Note: Press Ctrl key to highlight multiple persons at a time.



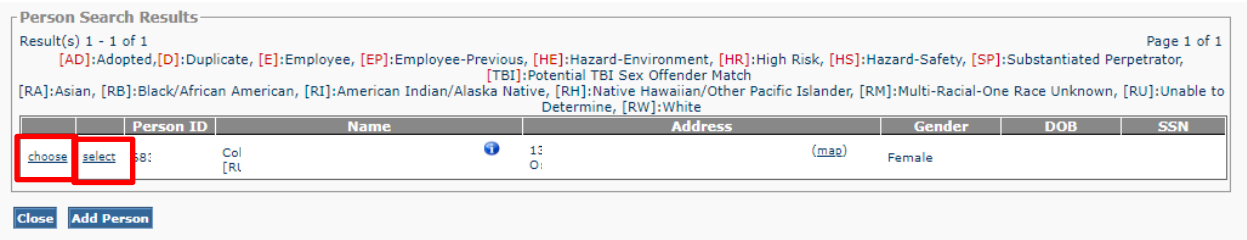
OR

- **Person Search –** search and find a **Person**
  - Click **Person Search**

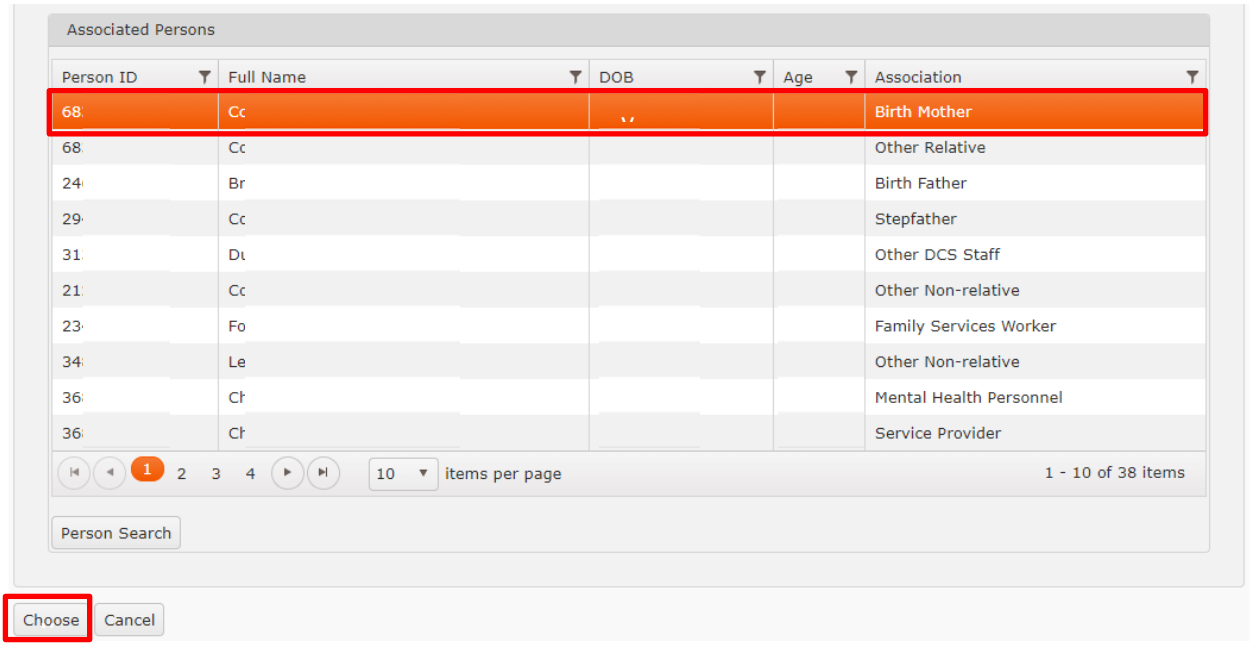
  - **Person Search** screen displays – use any of the **Person Search Criteria** to perform a person search
  - Click **Search** to display **Person Search Results**



  - To View information on a Person, click **select**
  - Click **choose** to add the Person to the Associated Person List

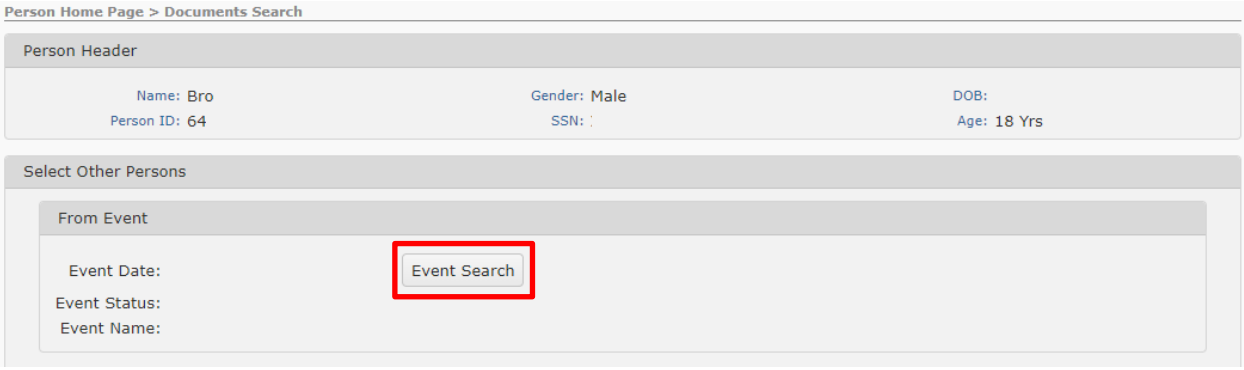


- Locate the **Person** who has been added to the **Associated Persons** screen display
- Click to highlight the person
- Click **Choose**

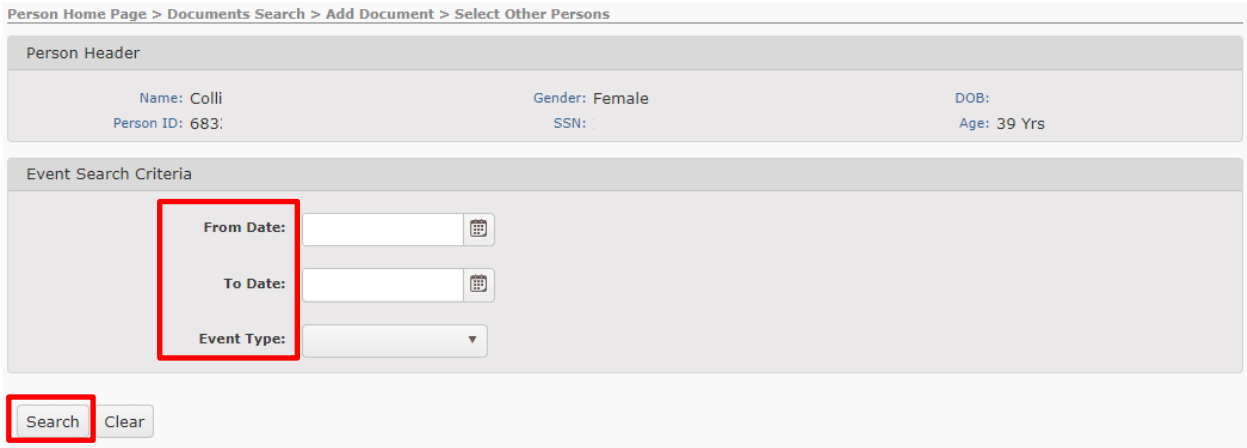


OR

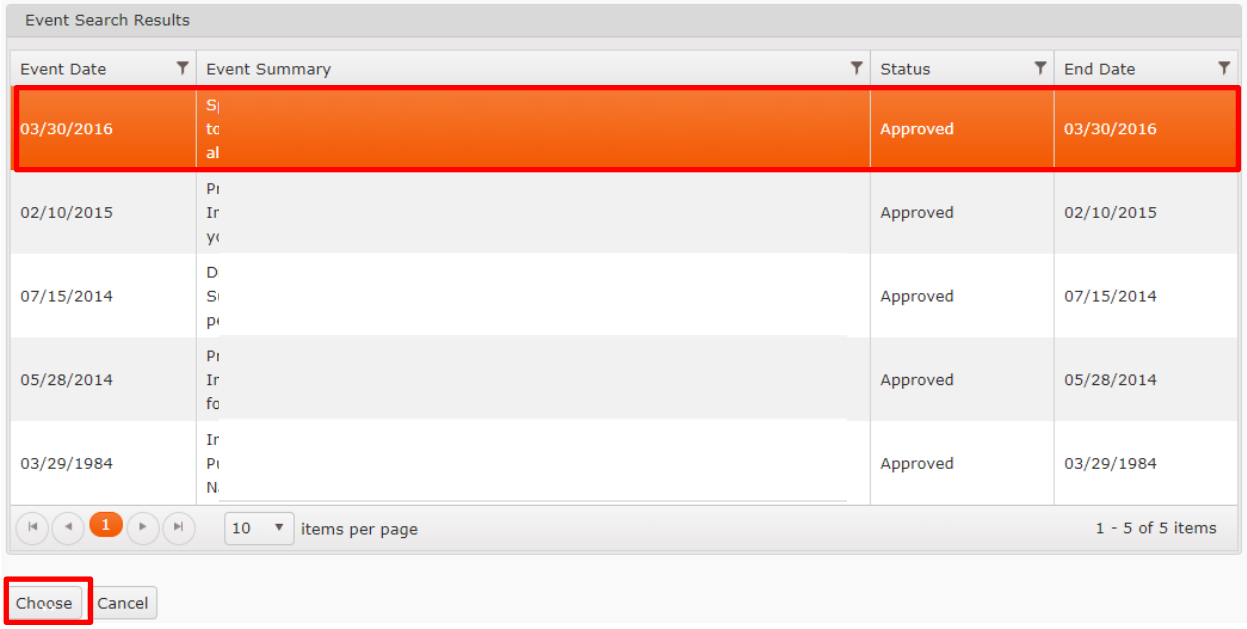
- **From Event**
  - Click **Event Search**



- Perform an **Event Search** via any or all of the **Event Search Criteria** this will allow for a search of events the person in focus is a part of
  - **Date From and To** – enter the dates manually or use the calendar icon
  - **Event Type** – click in the box to scroll and make a selection
  - Click **Search**

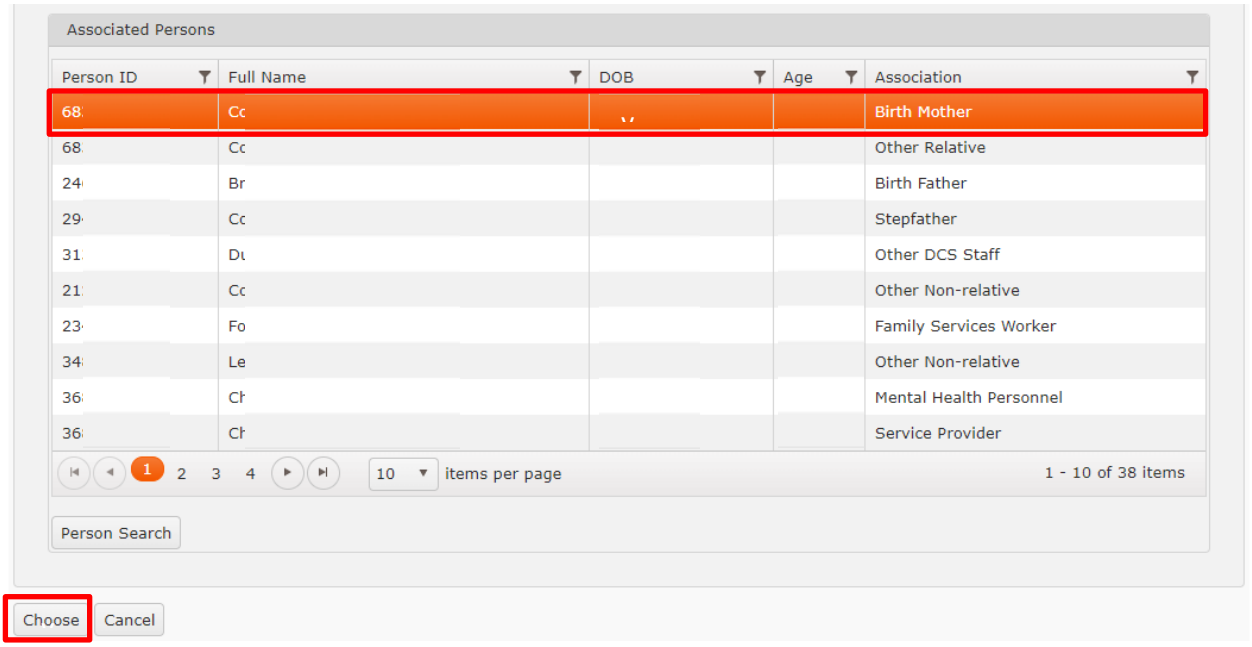


- **Event Search Results** appear
  - Click to highlight the **Event** with the **Associated Persons** to display
  - Click **Choose**



- **Associated Persons** screen displays those persons associated to the event selected
    - Click to highlight appropriate person(s) displayed
    - Click **Choose**

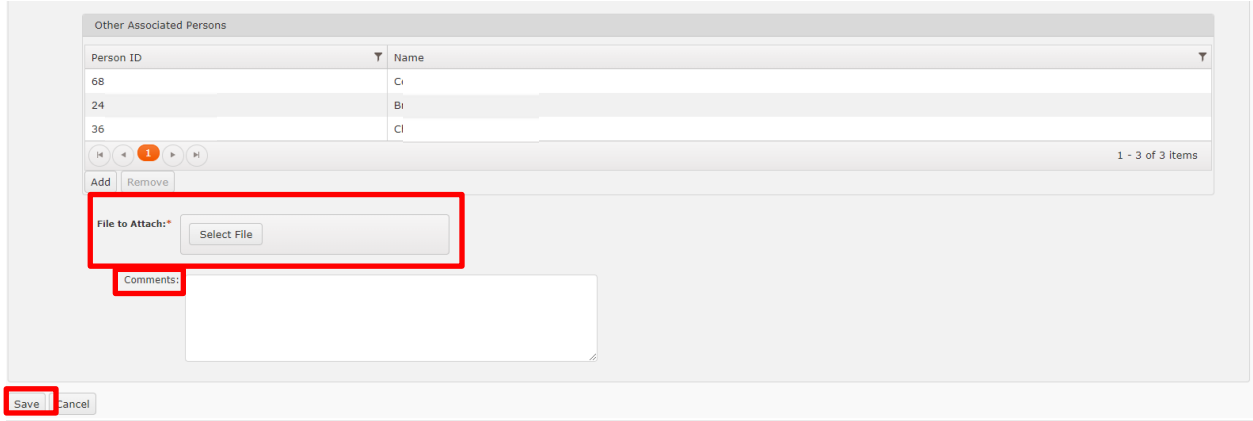
Note: Press Ctrl key to highlight multiple persons at a time.



- **File to Attach***
    - Click **Select files….**(ensure file is named using the established Name convention from page 2)
    - A Popup appears, search to locate and click on file to attach
    - Click **Open**

Note: If the name of the file attempting to load has the same name as another file with the same Document Category and Document Type for the same person an error message will occur. See **Document Name** section (page 2).

- **Comments** (optional)
- Click **Save**



Continue to next subtopic.

Linking to an Event

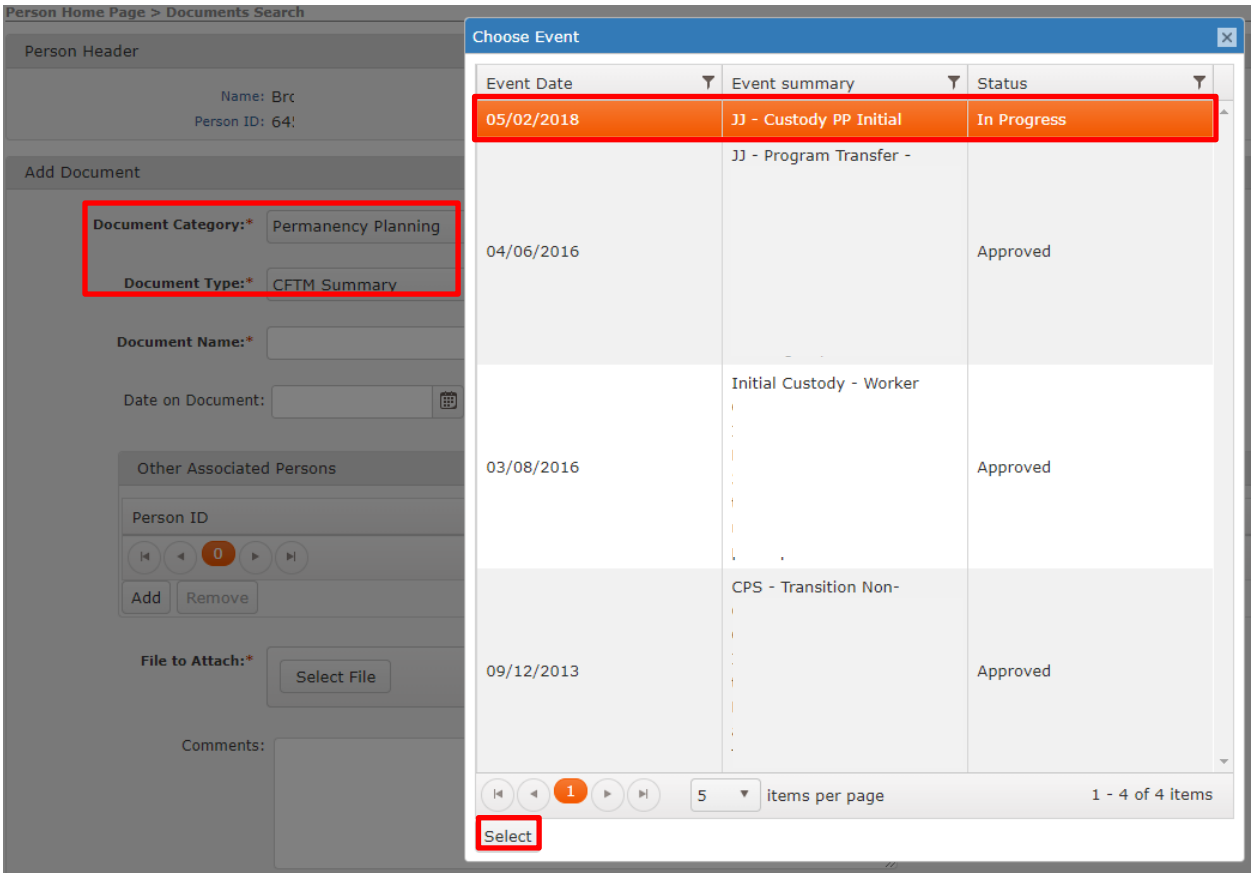
When a new document is being added it can be linked to an **Event Type** when the **Document Type** is associated to an **Event Type**. Linking to an **Event Type** allows for better organization and association of documents to areas of importance within TFACTS.
Linking a document to an **Event Type** 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. **Documents** linked to an **Event** will also be linked to all participants in that **Event.**

Note:

- *The only document that will to link to a CPS Intake will be the CPS Intake CS-0680.*
- *The only document that will to link to a CPS Case will be the CPS Case Summary and Classification Decision of Child Abuse/Neglect Referral CS-0740.*

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

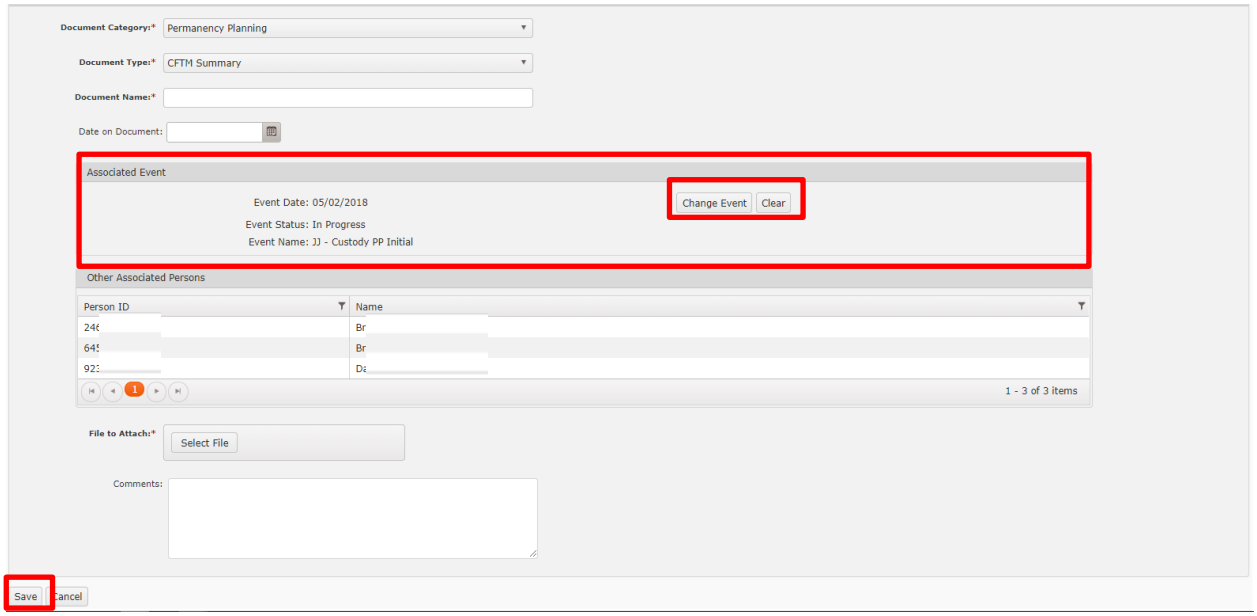


- Enter the **Document Name*** (use established Name convention from page 2)

- Enter the **Date on Document**, manually or via the calendar icon (optional)
- **Other Associated Persons** – displays persons associated to the event that the document will also be linked to
- **File to Attach***
    - Click **Select files….**(ensure file is named using the established Name convention from page 2)
    - A Popup appears, search to locate and click on file to attach
    - Click **Open**

Note: If the name of the file you are attempting to load has the same name as another file with the same Document Category and Document Type for the same person an error message will occur. See **Document Name** section (page 2).

- **Comments** (optional)
- Click **Save** if everything is correct. OR
- Click **Clear** to remove the linked **Event**
- Click **Change Event** will display the popup box again to select a different **Event**. The **Document Name**, **Date on Document** and **File to Attach*** (ensure file is named using the established Name convention from page 2) will need to be re-entered.



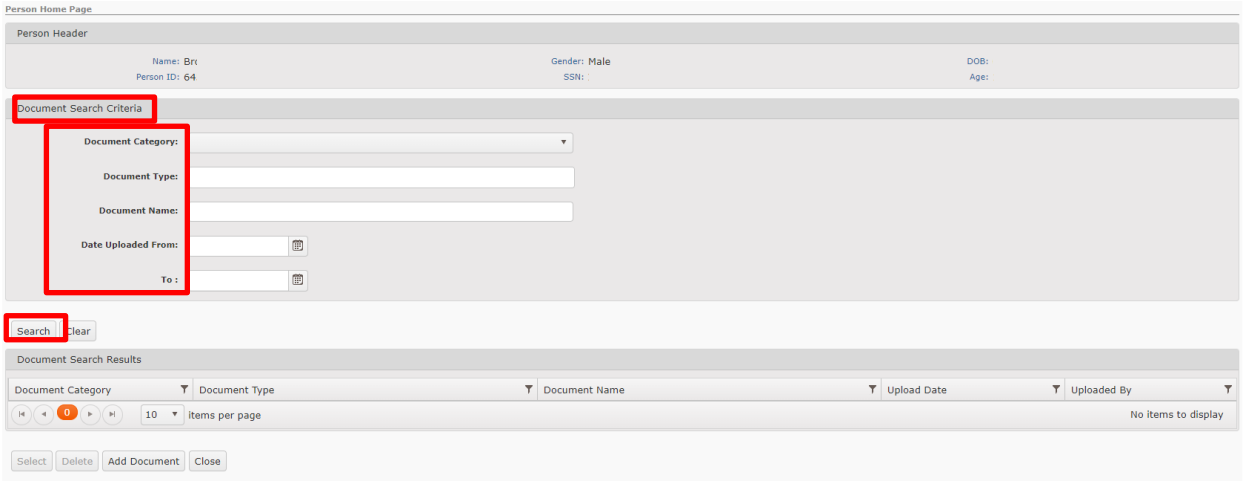
Continue to next sub topic

Document Search and Results

Navigate to Person Home Page, click **Document**.

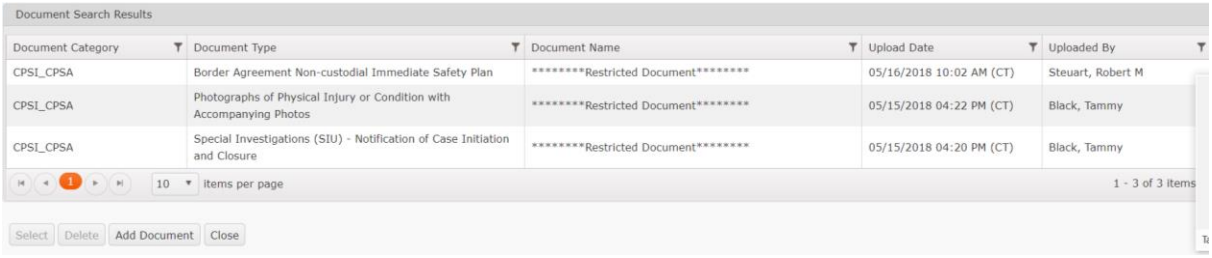
Click **Search** to return all Documents or use the Document Search Criteria to narrow your search.

- **Document Category** –use the dropdown to make a selection
- **Document Type** – click in the box to scroll and make a selection
- **Document Name** – (use established Name convention from page 2)
- **Date Uploaded From and To** – enter the dates manually or use the calendar icon
- Click **Search**



Document Search Results will be displayed and columns can be filtered by using the ▼ in the column headers.

Note: If Document Name displays **Restricted Document** the employee does not have access to view these types of documents. (Example: SIU documents)



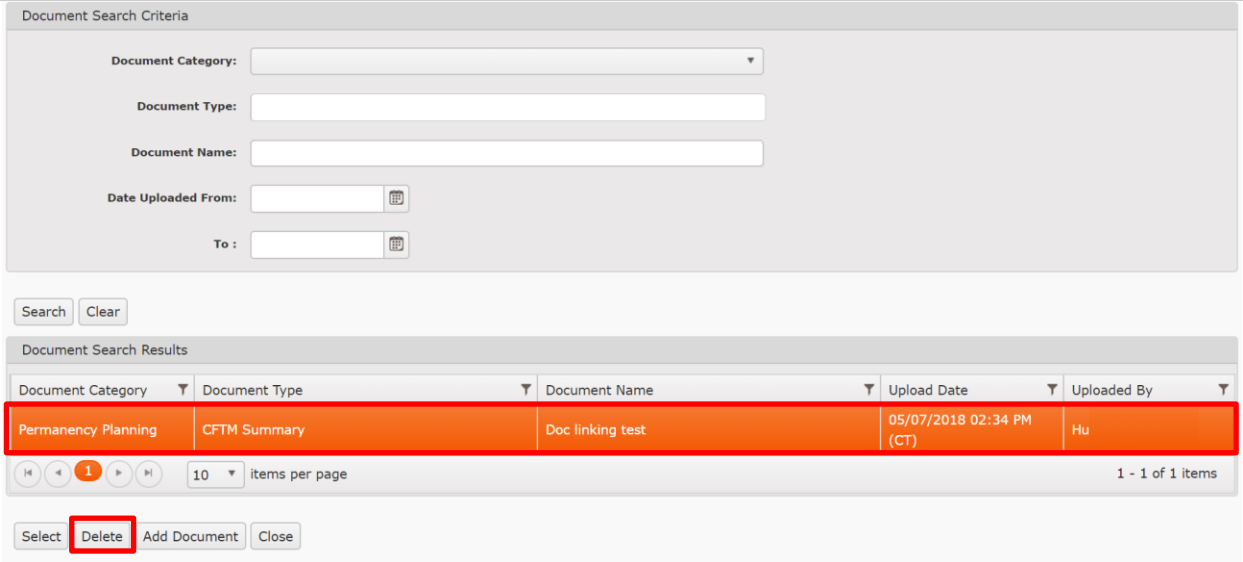
Continue to next sub topic

Deleting a Document

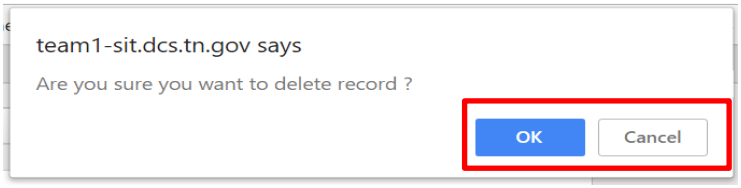
Deleting a Document is specific to the Person in focus. To Delete a Document navigate to the Person Home Page and click on **Documents**. Only persons with necessary user security may delete CPSI/CPSA documents.

Event Types that will delete from multiple persons at a time are CPS Intakes, CPS (I / A) Investigations, Resource and Home Study, the same process applies but the action must be performed under the **Event** itself to remove the document from all members of the Event.

- Click **Search** to return all Documents
- Click on the row of the item to be deleted. It will be highlighted orange.
- Click **Delete**



- A popup window appears for verification the record is to be deleted
- Click **Ok** to proceed with deletion or click **Cancel** to abort the deletion.



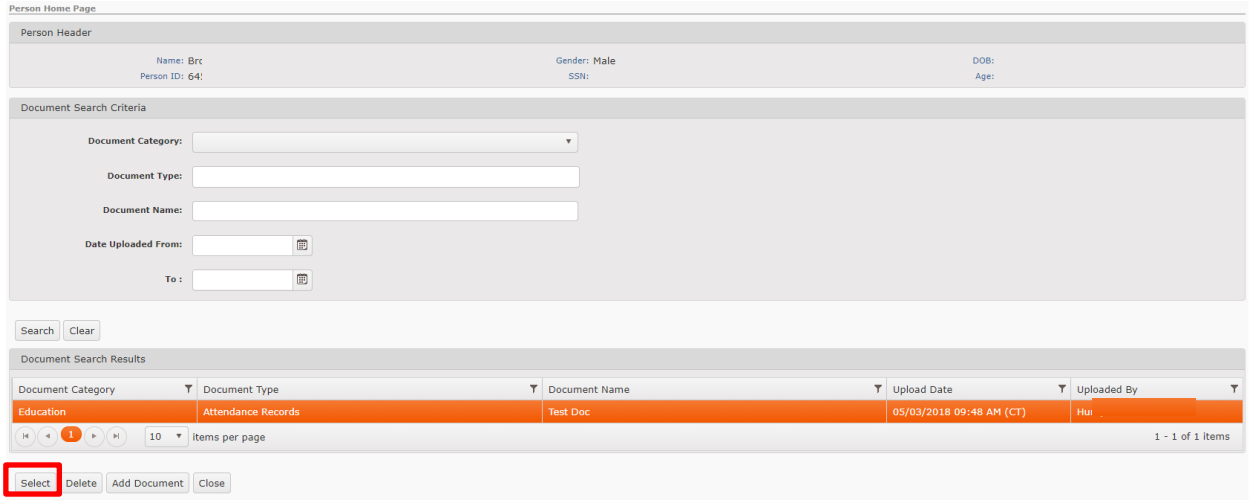
- **Document Search Criteria** screen will appear again

Verify the Document has been deleted.

Continue to next sub topic

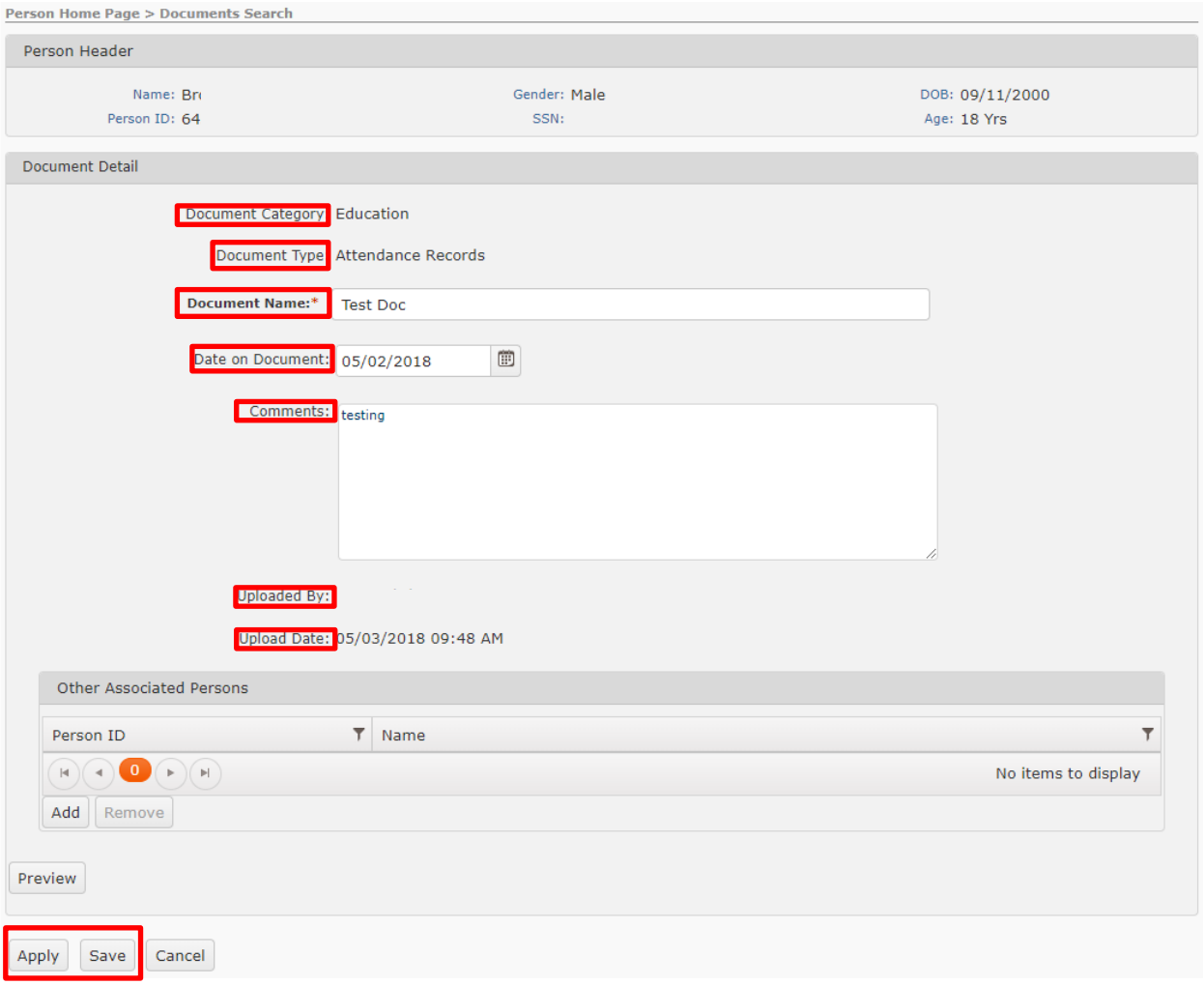
Viewing and Modifying Document Details

- Click the desired row to view
- Click **Select**



The **Document Detail** screen displays the following:

- **Document Category**
- **Document Type**
- **Document Name***– This area can be modified if needed/appropriate (use established Name convention from page 2)
- **Date on Document** – This area can be modified if needed/appropriate
- **Comments** – This area can be modified if needed/appropriate
- **Uploaded By**
- **Upload Date**
- **Other Associated Persons** – lists other persons also linked to this document
- Click **Apply** or **Save**

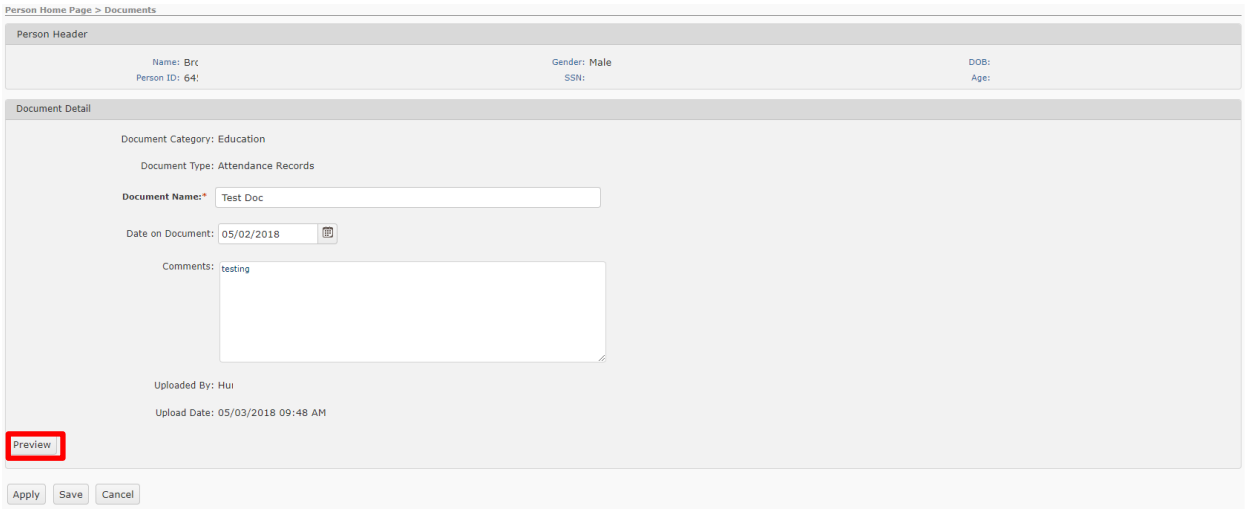


Continue to next sub topic

Previewing a Document

From the **Document Detail** screen

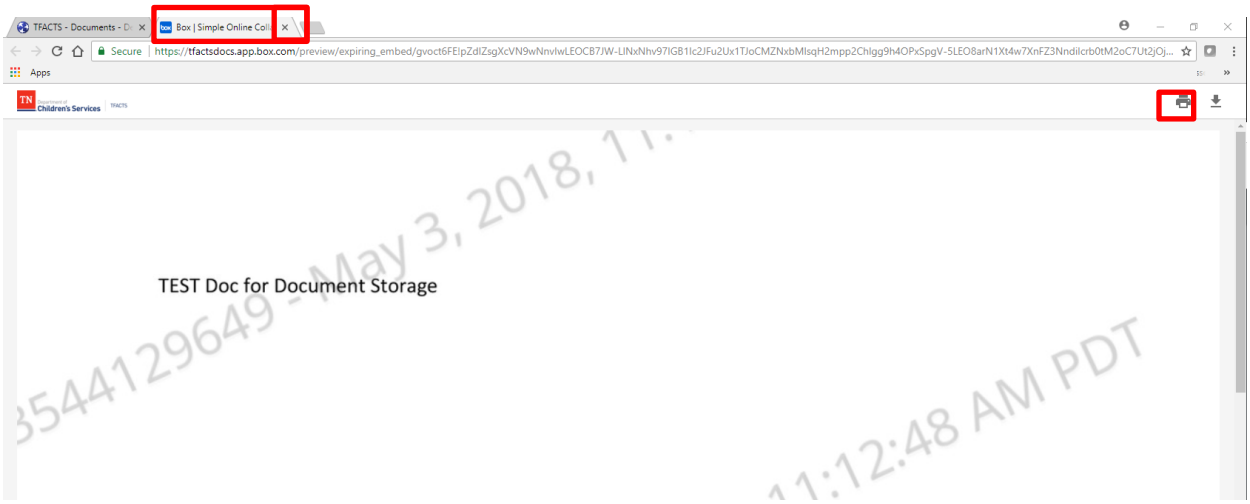
- Click **Preview**



- A new browser tab will open previewing the document

Note: The displayed document will be watermarked for security reasons.

- Close tab or proceed to Printing or Downloading the Document.



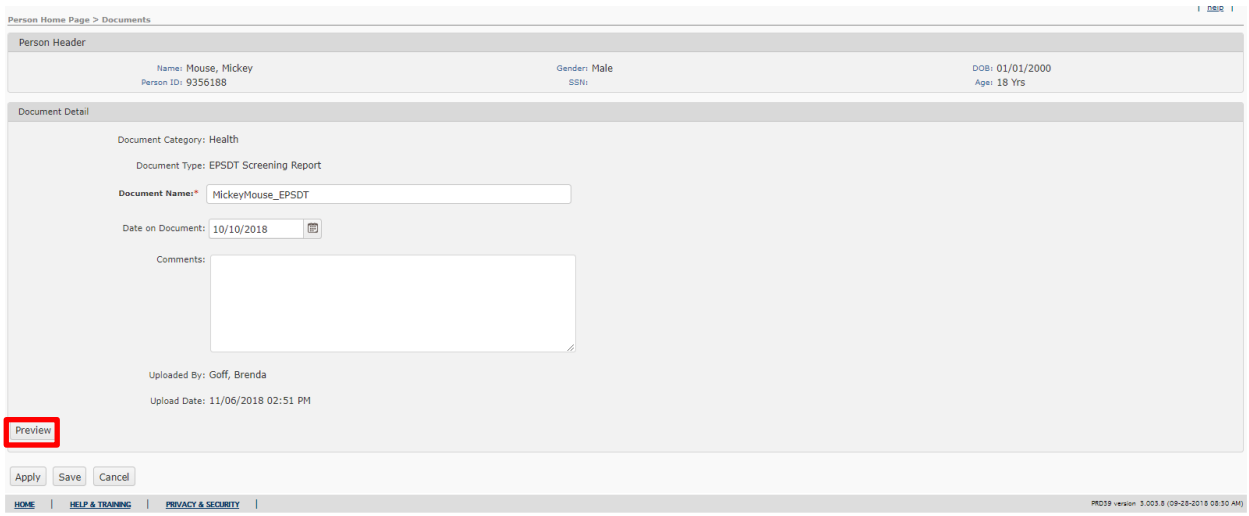
Continue to next sub topic

Printing a Document from Preview (Watermark Prints)

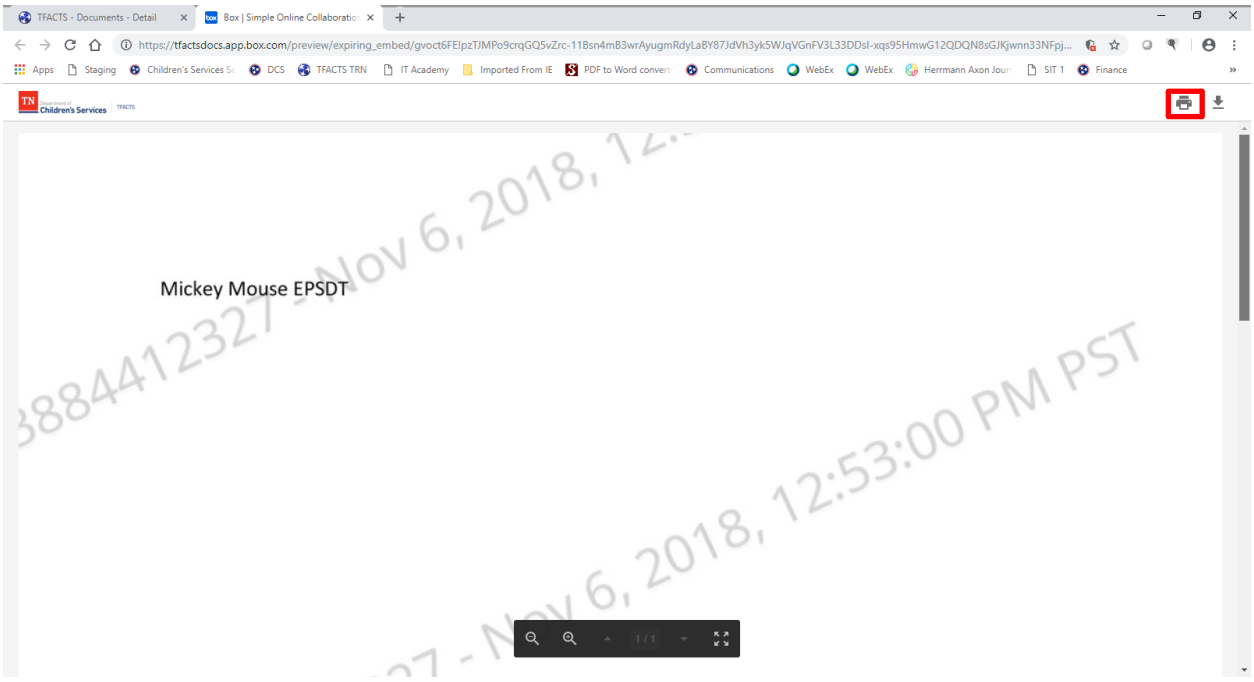
When printing a document from the **Preview** a watermark will print on the document

From the Document Detail window

- Click Preview

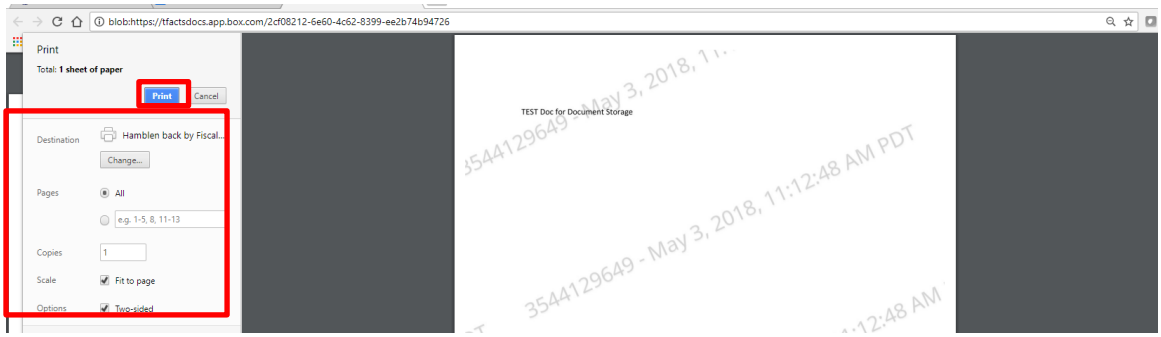


- Document will display with watermark
- Click the Print icon in the upper right corner



- Verify the print settings
- Click **Print**

Note: Document will be printed with the Watermark included.



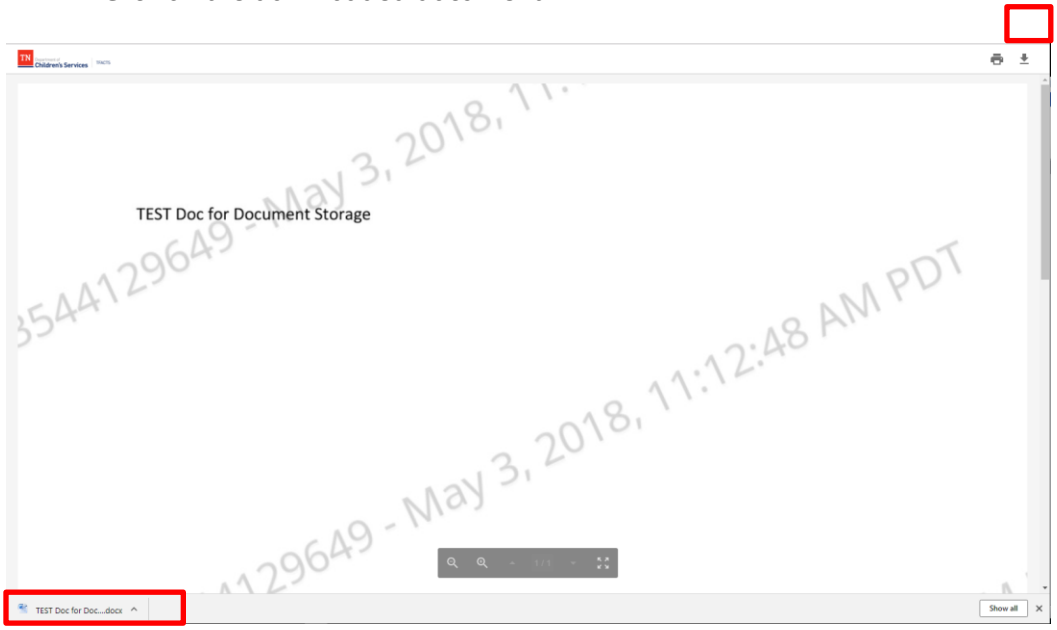
Print (No Watermark) / Download Document

From the Document Detail window

- Click Preview

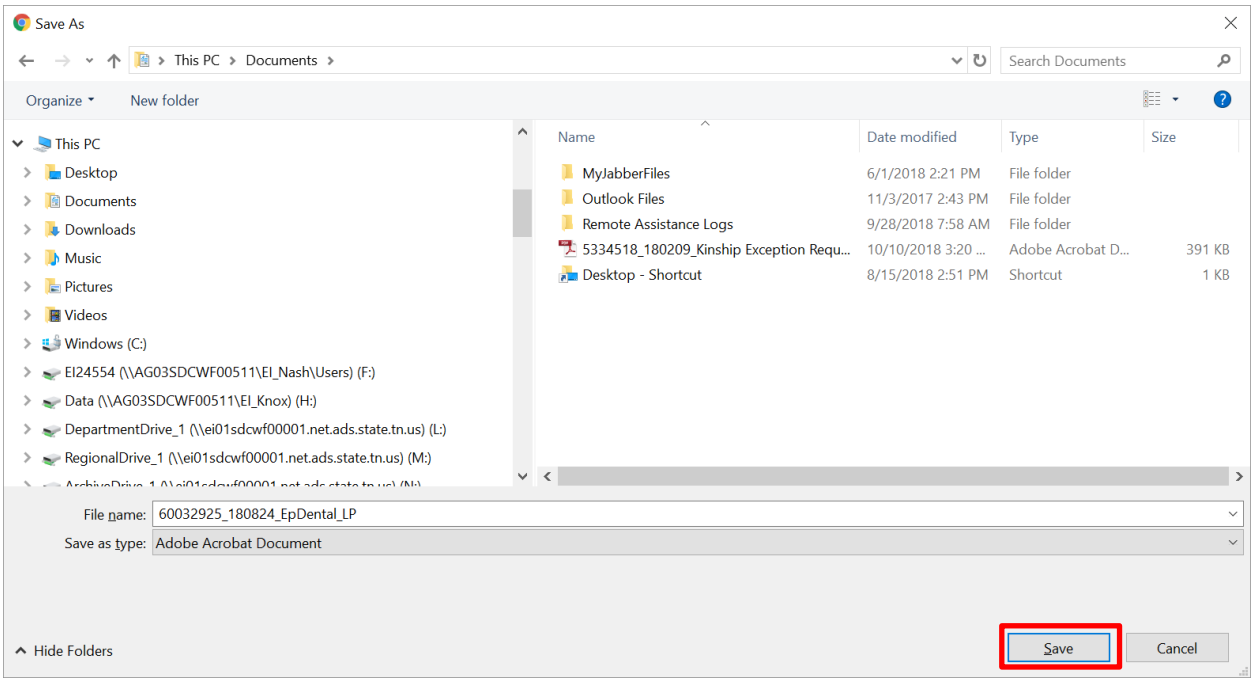
From the Preview

- Click the Download icon
- The download will display at the bottom of the screen
- Click on the downloaded document



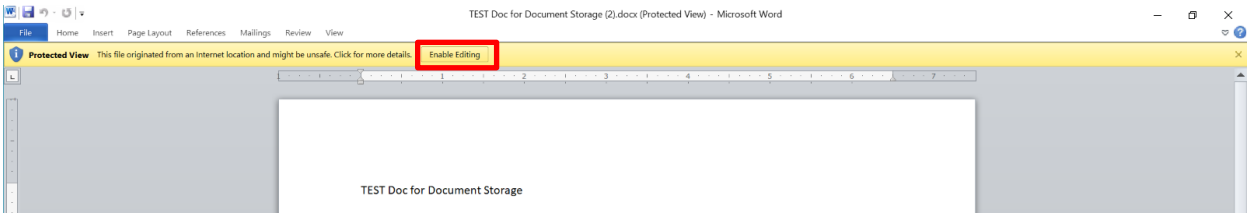
Note: Enable Editing may need to be clicked to enable options to work with the document

- Save options will display
- Select where to save the document to, then click Save

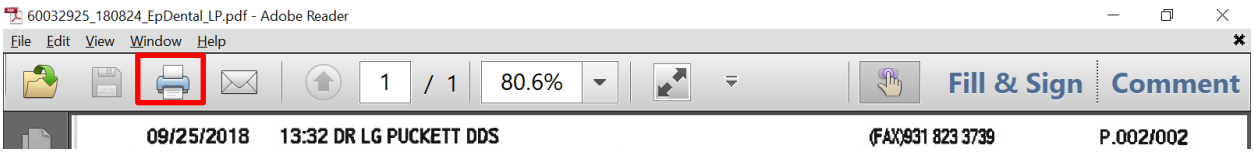


- Open the document to view

Note: Enable Editing may need to be clicked to enable options to work with the document



- PDF version of the document will display
- Click the Print Icon



- Verify the print settings
- Click **Print**

You have completed this storyboard