



Storyboard

Entering Case Recordings

This storyboard describes how to locate, filter, add, delete, mark in error, print and add addendums to Case Recordings in TFACTS.

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Step 1: Navigating to Case Recordings

There are three ways to navigate to **Case Recordings**:

1. **Home/Workload:** All Recording Types-Locate assigned case, click to expand screen, click **Recordings**
2. **Family Case Recordings:** From family case **Overview** screen, click **Case Recordings**
3. **CPS Recordings:** From **CPS** case, under **Investigation Topics** tab, click **Case Recordings**

Step 2: Searching/Filtering Case Recordings

1. To **Search:** On any **Case Recordings** screen, click **Search** to display all **Case Recordings** for that particular case type

Note: Recordings normally display in chronological order. For cases with over 500 case recordings, results may not display chronologically and may require a filtered search to locate the most recent recordings.

Retrieved more than 500 records. Only first 500 have been returned

Case ID: 2937717 Case Name: Mouse, Minnie Case Status: Open Organization: South Central Region

Recording Search Criteria

Contact From Date: Contact To Date:

Entered By: Location:

Status: Participant:

Contact Type: Contact Method:

Sort Results By:

Search Clear Form

Add Recording Print

Result(s) 1 to 500 of 500

| Recording ID | Contact Date | Contact Method | Contact Type | Participant | Entered By Location |
|--------------|--------------|----------------|--------------|-------------|---------------------|
|--------------|--------------|----------------|--------------|-------------|---------------------|

2. To **Filter:** In the **Search Criteria** section, choose one or more **Search Criteria** options from drop-down(s), click **Search**

Case ID: 2937717 Case Name: Mouse, Minnie Case Status: Open Organization: South Central Region

Recording Search Criteria

Contact From Date: 01/01/2021 Contact To Date: 05/01/2021

Entered By: Location: Court

Status: Completed Participant:

Contact Type: Case Manager/Child Contact Contact Method: Face To Face

Sort Results By:

Search Clear Form

Step 3: Adding Case Recordings

The process of entering a **Case Recording** is similar in all case types.

1. From the **Case Recordings** screen, click **Add Recording**

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The **Recording Detail** screen displays. Each recording entered will have a **Recording ID** number specific to that recording. The **Created Date** will automatically generate based on the date the recording was entered.

2. **Contact Date**-Use calendar or type date of contact
3. **Contact Time**- (only for CPS Recordings)-Enter **Time**, Choose **AM** or **PM**, and **Zone** (defaults to CT)

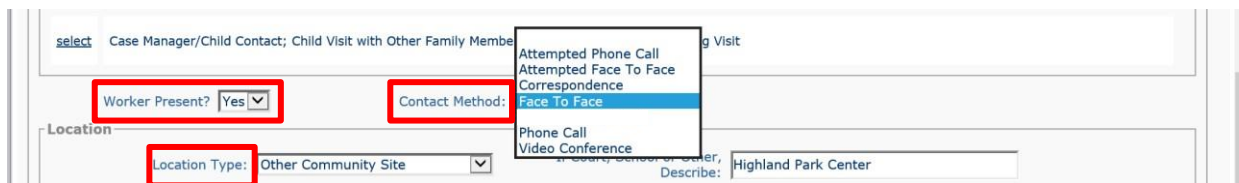
Note: If another worker made the contact and the recording is being entered on their behalf, click the **Employee Search** in **Recorded For** section. Choose appropriate employee in search results. Otherwise, move to next step.



4. In the **Contact Type** section, click **Select**
5. In the **Select Contact Types** section, check one or more **Contact Type** boxes

Note: Some **Contact Types** cannot be combined. If so, this information will display in the **Restriction** column of the contact as **"Can't be selected with other values"**.

6. Click **Save**
7. The **Recording Detail** screen displays with the **Contact Type(s)** chosen. Answer the following:
 - a. **Worker Present?** -Select **Yes** or **No**
 - b. **Contact Method** -Choose **Method** from drop-down
 - c. **Contact Sub Type**- (only for CPS Recordings-Good Faith Efforts) select **Contact Sub Type** from drop down
 - d. **Location**- Choose **Location Type** from drop-down
 - e. If applicable, depending on **Location Type**, enter **If Court, School or Other, Describe** information



Note: Optional-If the **Location Type** is a **Resource Home**, the **Resource Search** button may be used to link it to the **Case Recording**. Once linked, the **Case Recording** can be copied to the **Resource Home** by selecting check box beside **Copy to Resource Record**.

8. **Purpose**- Choose one or more **Available Purpose(s)**, click **Add>>** to move to **Selected Purposes** section
9. **Participant**- Click **Add Participant** button

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Case > Case Recording > Recording List

Case Header
Case ID: 2937717 Case Name: Mouse, Minnie Case Status: Open Organization: South Central Region

Recording Detail
Recording ID: 37995387 Created By: Bocci, Linda Renee Created Date: 06/16/2021

Contact Date: + * 05/19/2021
Recorded For: Employee Search Clear

Contact Type
select Case Manager/Child Contact; Child Visit with Other Family Member/Kin; Parent/Child Visit; Sibling Visit

Worker Present? Yes Contact Method: Face To Face

Location
Location Type: Other Community Site If Court, School or Other, Describe: Highland Park Center
Resource: Resource Search Clear
Copy To Resource Record?

Purpose
Available Purposes: Safety - Child/Community Service Planning Add >> Selected Purposes: Permanency Well Being

Participant
Result(s) 0
No Results Returned.
Add Participant

The **Recording Detail** screen displays the **Select Person** section to add participants.

10. Click to expand the **Child Present** category
11. Click checkbox in front of each applicable **Child Present**
12. Select **Yes** or **No** for **Social, Medical, and Educational Needs Addressed?** for selected youth
13. Select **Yes** or **No** for **Motivational Interviewing Used?** for selected youth

Case > Case Recording > Recording List > Recording Detail

Case Header
Case ID: 2937717 Case Name: Mouse, Minnie Case Status: Open Organization: South Central Region

Select Person
Child Present (2)

| | Name | DOB | Role | Social, Medical & Educational Needs Addressed? | Motivational Interviewing Used? |
|-------------------------------------|-------------|------------|---------------|--|---------------------------------|
| <input checked="" type="checkbox"/> | House, Jane | 04/12/2007 | Child Present | Yes | Yes |
| <input checked="" type="checkbox"/> | House, John | 02/02/2010 | Child Present | Yes | Yes |

Note: Sometimes the youth(s) will not be available under **Child Present** or the **Assigned Worker** doesn't appear in the list of **Participant** options. Some possible reasons this occurs are:

- a. No **Child Present** or **Assigned Worker**-The **Assignment Date** for the youth is a date that is later than the **Contact Date** of the **Case Recording**. When this happens, start the **Case Recording** with a date that falls on or after the youth's **Assignment Date**. The youth should then be listed under **Child Present** and **Assigned Worker** should appear. Once you have added the **Child Present** and/or the **Assigned Worker** to the **Case Recording**, change the **Contact Date** to the correct date of contact.
- b. **No Child Present**-No date of birth has been entered for the youth. Enter the date of birth through the **Person Home Page**, under **Person** link.
- c. No **Child Present** for CPS youth- A new ACV (Alleged Child Victim) was added that was not on the original referral. At least one allegation must be entered before youth appears as **Child Present**
- d. No **Child Present** for CPS youth: The youth needs to be established to a Person ID

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- Click checkbox by each applicable **Participant** in the remaining fields, including **Assigned Worker** (if **Worker Present** was marked as **Yes** on previous screen)

Note: If **Other Worker** that is not assigned to the case needs to be included, click on **Employee Search** to locate employee, click **Select** by employee's name to include as **Other Worker**.

- Click **Save** to return to the **Recording Detail** screen

| Name | DOB | Role | Social, Medical & Educational Needs Addressed? | Motivational Interviewing Used? |
|-------------|------------|---------------|--|---------------------------------|
| Mouse, Jane | 04/12/2007 | Child Present | Yes | Yes |
| Mouse, John | 02/02/2010 | Child Present | Yes | Yes |

| Name | DOB | Role |
|---------|-----|--------------------|
| B Vmy L | | SS Custody Worker |
| F | | ICPC Administrator |

The **Recording Detail** screen displays with **Participants** listed.

Note: Click **Add Participant** to add any additional **Participants**, or click **Delete** to delete an existing **Participant**.

- Enter **Narrative** (the **Narrative** field will hold up to 32,000 characters)
 - Clicking **Expand** will display the entire narrative while it's being typed
 - Clicking **Spell Check** will check for errors
- Click **Apply** to save changes/remain on screen, or click **Save** to save changes/leave the screen and keep the recording in **Draft** status to complete later. See Step 4 for how to locate a **Draft** status recording after saving it. **Draft** recordings may be edited and/or deleted, but once marked as **Completed**, changes cannot be made.

Narrative: [Narrative here]

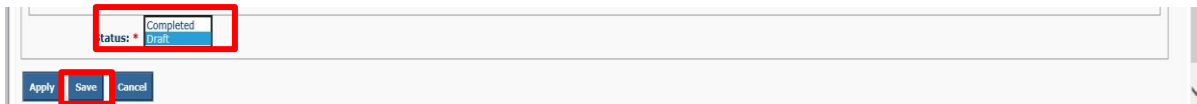
Expand Spell Check Clear

Status: * Draft

- If the recording is ready to complete, change **Status** field from **Draft** to **Completed**, click **Save**

Note: Recordings must be in **Completed** status to be a viable recording for face to face or other reports. Recordings must also be **Completed** within 30 days from **Created Date** to avoid becoming **System Completed**.

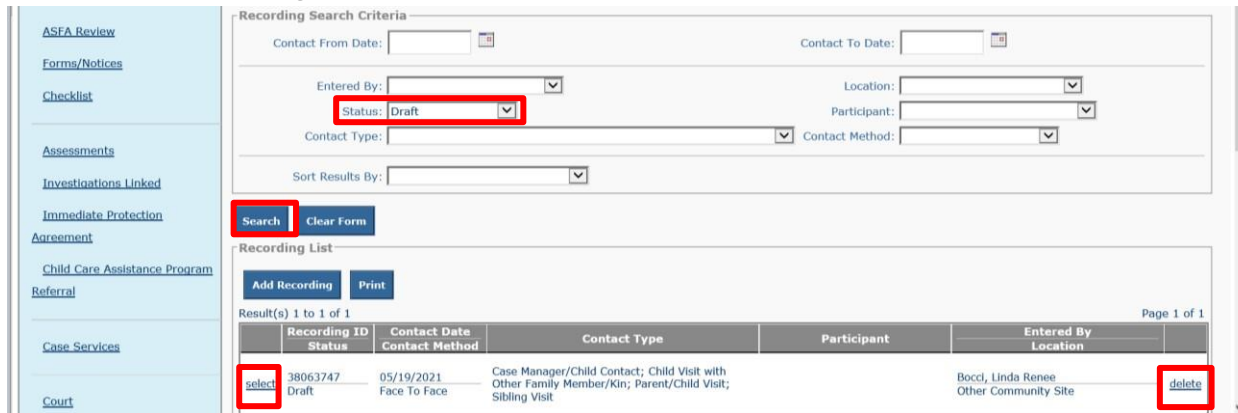
Recordings marked **System Completed** are no longer editable or viable recordings.



Step 4: Locating or Deleting Draft Status Case Recordings

1. To locate a **Draft** status recording, click **Search** in the **Case Recordings** screen for all recordings to display, or from the **Search Criteria's Status** field, choose **Draft**, then click **Search**
2. After locating the **Draft** recording, click **Select** beside the recording to navigate to the **Recording Detail** screen to continue recording or to mark recording as **Completed**
3. To delete a **Draft** status recording, locate the recording. To the right of the recording, click **Delete**

Note: Only the person that entered the recording, their supervisor, or others with certain security access, can delete a **Draft** status recording.



Step 5: Marking Completed Recordings in Error

A recording can only be deleted while in **Draft** status (see Step 4 above). Once recording is in **Completed** status, the options are **Mark in Error** or **Add Addendum**.

1. Locate the recording, click **Select** by the completed recording to navigate to **Mark In Error** option.



2. At bottom of page, click **Mark In Error**



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3. Enter reason in the **Mark In Error Narrative** section (required)
4. Click **Save**

Mark In Error Detail

Mark In Error Narrative: *

Enter justification for marking recording in error here....

Expand Spell Check Clear 0940

Save Cancel

5. The **Case Recording Detail** screen displays, click **Close**

Note: The **Recording Status** displays as **Created in Error** and will no longer be considered a viable recording for face to face or other reports.

6. Click **Close**

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

| Recording ID Status | Contact Date Contact Method | Contact Type | Participant | Entered By Location |
|---|-----------------------------|---|--|---|
| select Created In Error | 05/19/2021 Face To Face | Case Manager/Child Contact; Parent/Child Visit; Sibling Visit | Bocci, Linda Renee; Mouse, Daughter; Mouse, Minnie; Mouse, Son | Bocci, Linda Renee Other Community Site |

Add Recording Print

Close

Step 6: Adding Addendums

There are times when additional information needs to be added to an already completed recording. In those instances, an **Addendum** may be added.

1. Locate the recording needing the **Addendum**, click **Select** beside the completed recording

Child Care Assistance Program Referral

Add Recording Print

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

| Recording ID Status | Contact Date Contact Method | Contact Type | Participant | Entered By Location |
|---|-----------------------------|----------------------------|---|----------------------------------|
| select 38130150 Completed | 05/20/2021 Face To Face | Case Manager/Child Contact | Bocci, Linda Renee; Mouse, Daughter; Mouse, Son | Bocci, Linda Renee Resource Home |

Add Recording Print

2. Scroll to **Narrative** section, click **Add Addendum**

Narrative:

Narrative Type: Original Entry Date/Time: 05/28/2021 11:31:47 Entered By: Bocci, Linda Renee

Enter narrative here for the 5/20/2021 case recording.

Expand Add Addendum

Status: Completed Completed Date: 05/28/2021 Completed By: Bocci, Linda Renee

The **Addendum Detail** screen displays both the **Existing Narrative** and an **Addendum Narrative** section.

3. Enter **Addendum Narrative** text (field limited to 10,000 characters)

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4. Click **Save**

Case Header
Case ID: 2937717 Case Name: Mouse, Minnie Case Status: Open Organization: South Central Region

Addendum Detail
Existing Narrative:
Narrative Type: Original Entry Date/Time: 05/28/2021 11:31:47 Entered By: Bocci, Linda Renee
Enter narrative here for the 5/20/2021 case recording.

Expand

Addendum Narrative: *
Add additional information here in the Addendum narrative section.....

Expand Spell Check Clear 09:30

Save Cancel

The **Recording Detail** screen displays both narratives with the date and time each narrative was individually entered.

5. Click **Close**

Narrative:
Narrative Type: Original Entry Date/Time: 05/28/2021 11:31:47 Entered By: Bocci, Linda Renee
Enter narrative here for the 5/20/2021 case recording.

Narrative Type: Addendum 1 Entry Date/Time: 05/28/2021 11:36:43 Entered By: Bocci, Linda Renee
Add additional information here in the Addendum narrative section.....

Expand Add Addendum

Status: * Completed Completed Date: 05/28/2021 Completed By: Bocci, Linda Renee

Close Mark In Error

The **Case Recording** screen displays a red **A** beside the recording to indicate an **Addendum** was added.

Child Care Assistance Program Referral

Case Services

Court

Removal Records

Placement Referral

Placement

Add Recording Print

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

| Recording ID | Status | Contact Date | Contact Method | Contact Type | Participant | Entered By Location |
|--------------|-----------|--------------|----------------|----------------------------|---|----------------------------------|
| 381301 | Completed | 05/20/2021 | Face To Face | Case Manager/Child Contact | Bocci, Linda Renee; Mouse, Daughter; Mouse, Son | Bocci, Linda Renee Resource Home |

Add Recording Print

Close

Step 7 Printing Case Recordings

1. Navigate to **Case Recordings** screen
2. Click **Search** to display all recordings (or use **Search Criteria** to display specific recordings)
3. Click **Print** either at top of recording list or at bottom

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| Recording ID | Contact Date | Contact Type | Participant | Entered By |
|--|----------------------------|---|--|--|
| <input type="checkbox"/> 38130152 Completed | 05/28/2021 Face To Face | Case Manager/Child Contact; Parent/Child Visit; Sibling Visit | Bocci, Linda Renee; Mouse, Daughter; Mouse, Minnie; Mouse, Son | Bocci, Linda Renee Other Community Site |
| <input type="checkbox"/> 38130151 Completed | 05/26/2021 Face To Face | Case Manager/Child Contact; Case Manager/Parent Contact | Bocci, Linda Renee; Mouse, Daughter; Mouse, Minnie; Mouse, Son | Bocci, Linda Renee Family Home |


- Click checkbox(es) to choose the recording(s) to print (or check the box at top of column to select all recordings)
- Click **Generate**

| <input type="checkbox"/> | Recording ID | Contact Date | Contact Type | Participant | Entered By |
|-------------------------------------|------------------------------|----------------------------|---|--|--|
| <input checked="" type="checkbox"/> | 38130152 Completed | 05/28/2021 Face To Face | Case Manager/Child Contact; Parent/Child Visit; Sibling Visit | Bocci, Linda Renee; Mouse, Daughter; Mouse, Minnie; Mouse, Son | Bocci, Linda Renee Other Community Site |
| <input checked="" type="checkbox"/> | 38130151 Completed | 05/26/2021 Face To Face | Case Manager/Child Contact; Case Manager/Parent Contact | Bocci, Linda Renee; Mouse, Daughter; Mouse, Minnie; Mouse, Son | Bocci, Linda Renee Family Home |
| <input checked="" type="checkbox"/> | 38130150 [A] Completed | 05/20/2021 Face To Face | Case Manager/Child Contact | Bocci, Linda Renee; Mouse, Daughter; Mouse, Son | Bocci, Linda Renee Resource Home |
| <input type="checkbox"/> | 38130149 Created In Error | 05/19/2021 Face To Face | Case Manager/Child Contact; Parent/Child Visit; Sibling Visit | Bocci, Linda Renee; Mouse, Daughter; Mouse, Minnie; Mouse, Son | Bocci, Linda Renee Other Community Site |

- The **Reports** screen displays, click **Generate Report**

| | |
|--------------------|-------------|
| Document Category: | CASE |
| Work-Item ID: | 2937717 |
| Task ID: | 50 |
| Document History | |
| | Document ID |

- The **Case Recording Summary** displays, the **Printer** icon displays in upper right section, click to print.
Note: You can also download the recording by clicking the **Download** icon (downward arrow).

| | |
|---|------------------------------------|
|  <p>Tennessee Department of Children's Services Case Recording Summary</p> | |
| Case Id: 2937717 | Case Name: Mouse, Minnie |
| Case Status: Open | Organization: South Central Region |
| Case Recording Details | |
| Recording ID: 38130152 | Status: Completed |
| Contact Date: 2021-05-28 00:00:00 | Contact Method: Face To Face |

You have completed this storyboard.