



Storyboard

Document Storage – Linking to Events

This storyboard demonstrates linking a document to an Event from the Event Type and from the Person Home Page Documents link.

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Document Storage Linking to Events

For information on working within the [Documents](#) link, refer to the **Document Storage Basics** storyboard. This storyboard details accessing the [Documents](#) link to add documents for each event type.

Step 1: Choosing the File Name (Name of Document on Computer)

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 File Name on the computer and the Document Name listed in TFACTS.

Note: File names must be unique. If attempting to upload a document with the same file name as a document that already exists in the system, TFACTS will generate the error message, **“A document already exists with this File name. Please rename and try again.”**

1. The approved naming convention for the file name is:
Child First Name_Child Last Name_Form Name_Date
 - a. For example: **Flavia_Deluce_CFTM_Summary_12052020** or **Flavia_Deluce_Drug Test Reports_11122020**
2. If a file name error occurs when uploading the document with the unique file name, change the name of the file on your computer to include an underscore and number at the end.
 - a. For example: **Flavia_Deluce_CFTM_Summary_12052020_1** or **Flavia_Deluce_Drug Test Reports_11122020_1**

Step 2: Choosing the Document Name (Name of Document in TFACTS)

The file will be uploaded to the [Documents](#) link. It will be available through [Documents](#) on the **Person Home Page** for each person it is associated with and through the [Documents](#) link within the **Event** with which it is associated.

1. The approved naming convention for the **Document Name** (name in TFACTS) is simply the **Form Name_Date**
 - a. For example: **Case Summary_02052019** or **Life Skills Assessment_02052019** or **Drug Test Reports_11022020**

Note: Linking a document to an **Event Type** will link the document to all participants listed in that **Event**.

Step 3: Linking a Document from the CPS Intake

The **Child Protective Services Intake** (CS-0680) will be available to link to a **CPS Intake** and will be linked to all **Intake Participants** when established in the CPS Case. If the document is deleted, it is deleted from the **Event** and from all established participants to whom it was linked. All other documents associated with a **CPS Intake** should be linked via the [Documents](#) link for the individual person(s) to which it applies.

1. Access the **CPS Intake** one of these ways:
 - a. Via the employee **Workload** OR
 - b. Via the **CPS Intake Workload Search Criteria** on the **Intake** tab
2. If accessed through the **Workload**, from the **Basic** tab of the **CPS Intake**, select **Documents**
3. If accessed through the **CPS Intake Workload Search Criteria**, from the **CPS Intake Workload**, select the **document** link associated with the **Intake**

Step 4: Linking a Document from a CPS Case

Only the **CPS Investigation Summary and Classification** 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 from all established participants to whom it was linked. All other documents associated with a CPS case should be linked via the **Documents** link to the individual person(s) to which it applies.

1. Access the **Investigation** through the employee **Workload** or through **Case Search**
2. From the **Investigation Topics** tab, select **Documents**

Step 5: Linking a Document from Home Study Section of Resource Home

1. Access the **Resource Home** via the employee **Workload** or via **Resource Search**
2. From the **Resource Overview**, select **Home Study**

The **Maintain Home Study History** screen displays.

3. Locate the appropriate **Home Study** and select the **document** link for the **Home Study**

Note: Documents linked to a **Home Study** will link to the **Person Home Page** of the **Resource Parent** and **Resource Co-Parent** only.

Step 6: Linking a Document from the Subsidy Record

1. From the **Financial** tab, select **Eligibility**
2. Select **Subsidy Determination**
3. From **Subsidy Program** screen, click **Person Search**
4. Complete **Person Search** and click **Choose** by the correct youth's name

The **Subsidy Program** screen displays

5. Under **Subsidy History**, locate the correct **Subsidy** record and select **documents**

Note: **Subsidy** is both an **Event Type** and a **Packet Type**. This information covers **Subsidy** as an **Event**. Documents linked to a **Subsidy** record will link only to the youth for which the **Subsidy** record applies. If siblings have been adopted, documents will need to be uploaded individually for each youth.

Step 7: Linking a Document to an Event through the Person Home Page

Linking a document to an **Event Type** will link the document to all participants listed in that **Event**. For a complete list of documents available under each **Document Category**, refer to the **Electronic Case File Checklist (CS-1202)**.

1. Follow the directions outlined in the **Document Storage Basics** storyboard for uploading a document
2. Click **Add Document**
3. Select **Document Category*** from drop-down
4. Select a **Document Type*** associated with an **Event Type** from drop-down

If multiple events are available, a pop-up box will display any available **Events** to which the document may be linked.

5. Click to highlight the **Event** to link document
6. Click **Select**
7. Enter **Document Name***
8. Optionally, enter **Date on Document**
9. Click **Select File** to choose file to attach
10. If needed, select **Change Event** to link to a different event
11. If needed, select **Clear** to remove the linked **Event**
12. Click **Save**

You have completed this storyboard.