# TFACTS On-Line Help: Needs and Action Steps

Needs and action Steps may only be added/updated from a source activity. Source activities are those actions that take place during casework where a child and family's strengths, needs and action steps are identified. Examples are CFTMs, Consultations, Collateral Contacts, External Assessment, and Immediate Protection Agreements. Source activities may be created by selecting the appropriate value from the **Quick Actions** list.

**NOTE:** To add a Need, the source activity status must be '**In Progress**".
From the **Strength and Needs** section of the source activity i.e., CFTM, Consolation, Collateral Contact

- **Add Needs –** the following fields are required
  - Click **Add** and select **'Need'** from drop-down list – the **Add Need** screen displays
  - Select **Concerned Person** from drop down **–** at least one: if multiple persons are selected, TFACTS will automatically create a separate Need record for each person. The list of **Concerned Persons** is derived from the persons in the **Team Members** section
  - **Begin Date** – may not be a future date
  - **Category** – select one from drop down
  - **Initial Description -**enter description of need – this is what will display for the need
  - Click **Save** to save the action step, click **Cancel** to delete or click **Save to Add Another** and TFACTS will automatically generate another **Add Need** screen.

  If saved, the CFTM screen is returned, and the new need will display.

**NOTE:** TFACTS is designed to allow Needs to be added to multiple Concerned Persons at the same time. A Need may be literally the same for all Concerned Persons, or they may be different (individualized) for each.

- If the Need being added is the same for all selected Concerned Persons, avoid re-entry of Need information by completing all elements of the Need before clicking Apply or Save. This will create a separate Need record for each Concerned Person.
- If the Needs are being entered for multiple Concerned Persons and the information is different for each, the minimum required elements, Concerned Person, and Begin Date may be entered and then navigate to each person's Need record to update individually.

- **View Needs**

Needs may be viewed from the **Electronic Case File (ECF)** and from within a source activity record. To view a Need from the ECF:

- Navigate to the **Person Home Page** for the youth
- The Need may display in the list at the bottom of the screen but if not, click the **+more** link: the ECF search screen will display
- **Event Type** drop down- select **Need**
- Click **Search;** all Need records will display
- Click **select** to view the desired Need - the **Need History** screen will display the need and indicate **'Where Update Occurred'"** (meaning what source activity the need was documented or updated
- Click the "source activity" to view the source and need details

- **Correct Need Details**

Only Need records with status of '**Pending**' may be corrected. While the Need is in '**Pending**" status, it may not be viewed, or updated form any source activity other than the source form which it was created. All elements of the Need record may be updated except for the Concerned Person field

- Access the Need record to be updated via the ECF or from the source activity record
- Click the Need row to review the information and make necessary corrections

- TFACTS automatically saves the information entered when moving from one need to another or screen to the
- Clicking **Apply** or **Save** will also save updates to the Need or Action Step but will also cause the Need card to collapse or close. Auto-save allows the Need to remain open if needed.

➢ **Review/Update Needs**

Only Need records with status of '**Open**' may be reviewed/updated.

- Access the Need record to be reviewed/updated via EDF or from the source activity record
  - Once a Need record is in **'Open'** status, it may be accessed from any source activity record for that person.
  - Reviews are not limited to the same source activity record, i.e., the need is entered in a CFTM but may also be reviewed/updated in a consultation.
  - A review may only be entered in a new source activity record of any type but may not be entered via any source activity record that is in '**Completed**' status, including the source activity where it was created.
- Click the Need to display the information; there will be two tabs enabled
- - Need info – read only need information
- - Review – enter necessary information for current review of need
  - **Update**
  - **Progress Status – select from drop down list.**
  - **Review End Date –** conditionally required if **Action Steps Completed (Ended) or Action Steps Not Completed (Ended)** is selected for Progress Status
  - **Review Status**
- Change Review status to '**Completed'** when all review info has been entered

➢ **Delete Needs**

Only Need records with status of '**Pending'** may be deleted

- Access the Need record to be deleted via ECF or from the source activity record
- Click the Need row to display the information
- Click the blue trashcan to delete the Need (right to corner of need record)
- Click **OK** to confirm and delete the Need
- Click **Cancel** to cancel the delete action

➢ **Mark Needs in Error**

Only Need records with status of '**Open**' or '**Closed**' may be marked in error.

- Access the Need record to be marked in error via ECF or form the source activity record
- Click the Need row to display the information
- Click the blue ! NEED in right corner of Need to mark the Need in error
- Click **OK** to confirm and mark the need in error
- Click **Cancel** to cancel the action

Items that have been marked in error may only be viewed/access from the ECF when the '**Created in Error'** events box is checked.

## Add Action Steps

Action Steps are only associated with Needs. To record an Action Step for a Need record, the Need must be in '**Open**' status.

- Click **Need** to display the Action Steps icon 
- Click **Steps** icon
- Click **Add Action Step** to display drop down list
- Select **Action Step** type from drop down list
- Enter info in all required fields – required fields are conditionally based on action step type selected as well as other fields in **Add Action Step** screen
- Once all required fields have been entered, click **Save** **OR**
- Click **Save and Add Another** when there are multiple Action Steps to be documented (time saving feather)

**Note:** Please refer to the **Case Services Storyboard** on the Knowledge Base for entering case services.