



# Storyboard

  

## Setting up a Foster Family Portal Account

This storyboard provides instructions for Foster Parent Support Staff (FPS) to set up TFACTS Foster Family Portal Accounts which allow DCS Foster Parents access to the Foster Family Portal.

### Table of Contents

Setting up the Foster Parent Portal Account.....2

Change User Name.....4

View and Lock/Unlock Foster Parent Portal Account.....4

Reset Password for Foster Parent.....5

Troubleshooting Common Login Issues .....5

# Setting up Foster Family Portal Account

The DCS Foster Parent Support (FPS) staff responsible for setting up the Foster Parent User Account in TFACTS must have the appropriate security access to set up the User Account. If the user does not have correct security access, please contact the regional FCCR for assistance.

To set up a Foster Family Portal Account the Resource Home must be, at minimum, in Pending status.

## Setting up the Foster Parent Portal Account

1. From the TFACTS home page, select **Administration**.
  2. Select **Security**.
  3. Select **User Account**.
- User **Account Search Criteria** displays.
4. Search first by **User Name** only to determine if the User Name already exists.
    - a. **User Name** should be formatted as EL\$+First 3 letters of First Name+First 3 letters of Last Name01.
    - b. Example: Foster Parent's Name is Snow White: EL\$SNOWHI01.
    - c. If the **User Name** searched for comes up do not use it again. **User Names** must be unique.
    - d. Change the number at the end of the **User Name** to 02 and search again, continue changing the number at the end until you identify a User Name where the number that has not been used.
    - e. This search may determine if there is a Portal account for the Foster Parent, but to be sure continue as stated below.
  5. Secondly, enter identifying information for the Foster Parent and select **Search** again to ensure there is not an existing **Portal** account.
  6. If there is not an existing account, select **Add**.

The screenshot shows the TFACTS interface for setting up a Foster Family Portal Account. The top navigation bar includes tabs for Home, Intake, Case, Resource, Financial, and Administration (which is highlighted). Below this, a sub-navigation bar shows Staff, Maintenance, Security (highlighted), Disciplinary Reports, and Utilities. On the left, a sidebar menu lists options like Maintain User, Assign User Groups, User Groups, Business Process Security, User Account (highlighted), and Approval Access. The main content area is titled 'User Account Search Criteria' and contains several input fields: User Name (with the value 'EL\$JEN'), First Name, Last Name, Account Type, Organization Type (a dropdown menu), and Organization Name (another dropdown menu). Below these fields are 'Search' and 'Clear Form' buttons. The 'Search' button is highlighted with a red box. Underneath is the 'User Account Search Results' section, which includes a table with columns for User Name, Person Name, Account Status, Organization Type, Organization Name, and Account Type. Below the table are pagination controls showing '0' items per page and 'No items to display'. At the bottom of the results section are 'Select', 'Add' (highlighted with a red box), and 'Reset Password' buttons.

## TFACTS Storyboard- Setting up a Foster Family Portal Account

**Add User Account** page displays.

7. User Name will be formatted EL\$+First three characters of First Name+First three characters of Last Name+01.
  - a. Always use Foster Parents legal name, do not use a nickname or middle name. Example: EL\$JOHSMI01 (username is not case sensitive).

**Note: User Name** must be at least 6 characters and must be unique; no other Foster Family Portal Account can have the same **User Name**.

8. To populate **Person Name**, select **Person Search**.
9. Complete **Person Search Criteria** fields and click **Search**.
10. Select **Choose** link next to the correct **Person Search Result**.

**Note:** To add the **User Account**, the Resource Home must already be set up in TFACTS. When you search, the Foster Parent should come back in search results. It is helpful to note the **Person ID** of the Foster Parent prior to beginning the creation of the **User Account**.

11. If **Gender** was recorded on the Person record selected, it will auto generate. If it does not auto generate, select from the list.
12. **Phone Number** recorded on the Person record may auto-generate. If not, enter **Phone Number**.
13. **Email Address** recorded on Person record may auto-generate. If not, enter the Foster Parent's email address.
14. Select **Account Type**. This will tell TFACTS the kind of **User Account** you are creating.
  - a. Foster Parents will need both **Basic** and **Resource Parent** account types.
  - b. **Basic** gives the user access to their personal account, which currently consists of changing their password.
  - c. **Resource Parent** gives the user access to all Foster Family Portal features.
15. Click **Save**.

**Note: Organization Type** and **Organization Name** are not used in setting up a Foster Parent Portal Account.

Administration > Security > User Account

Add User Account

User Name: \* EL\$JEN

Person Name: \* Jer Person Search

Gender: Female

Phone Number: \* (931) 93

Email Address: @gmail.com

Account Type: \* Basic x Resource Parent x

Organization Type:

Organization Name:

Save Cancel

## Change User Name

**Note:** If a **User Name** must be changed, the existing **Account Status** must be **Locked** (inactivated) and a new **User Account** created.

## Viewing and Locking/Unlocking Foster Parent Portal Account

1. From the **Administration** tab, select **Security**.
2. Select **User Account**.
3. Enter **User Account Search Criteria**.
4. Click **Search**.

**User Account Search Results** display.

5. Highlight row of correct account and click **Select**.

**User Account Detail** page will display.

6. **Account Status** controls the accessibility of the account.
  - a. **Unlocked** means the account is active and account user can access TFACTS.
  - b. **Locked** means that the account is inaccessible to account user; TFACTS cannot be accessed.
7. **Account Status** should be the Resource Home Close:
  - a. If Account Types are only **Basic** and **Resource Parent** the **Account Status** should be **Locked**.
    - i. If the Resource Home is in Closed status, prior to locking the account, the **Resource Parent Account Type** will have to be deleted in order to lock the account.

The screenshot shows the 'User Account Detail' form. The 'Account Type' dropdown is set to 'Basic' and is highlighted with a red box. The 'Account Status' dropdown is set to 'Locked' and is also highlighted with a red box. Below these, there are fields for 'Organization Type' (set to 'Unlocked') and 'Organization Name'. At the bottom, there are three buttons: 'Apply', 'Save' (highlighted with a red box), and 'Cancel'.

- b. If additional **Account Type** of **Background Check** exists, **Account Status** should remain **Unlocked**, but the **Account Types** of **Basic** and **Resource Parent** must be removed.

The screenshot shows the 'User Account Detail' form. The 'Account Type' dropdown is set to 'Background Check' and is highlighted with a red box. The 'Account Status' dropdown is set to 'Unlocked' and is also highlighted with a red box. Below these, there are fields for 'Organization Type' and 'Organization Name'. At the bottom, there are three buttons: 'Apply', 'Save' (highlighted with a red box), and 'Cancel'.

**Note:** If updates are needed to **Person Name**, **Gender**, **Phone Number**, and **Email Address**, complete a **Search** for the person in TFACTS and update from the **Person Profile**.

## Reset Foster Parent Password

If a Foster Parent gets 'locked out' of their account, the Foster Parent Support staff can reset the password in the Foster Parent User Account.

From the **User Account Search Criteria**

1. Enter available information in **User Account Search Criteria**.
2. Select **Account Type**.
3. Click **Search**.
4. Click to highlight correct account.
5. Select **Reset Password**.

**Note:** The password will be reset to **LetMeInPass-1** (password is case sensitive).

## Troubleshooting Common Login Issues

If a Foster Parent is unable to log in, follow the steps below to troubleshoot the most common reasons for log in errors.

1. Complete a search for the **User Account** and verify it is **Unlocked**.
  - a. If the account is unlocked, complete a search for the username to verify no other accounts exist with the same **User Name**. If there are two Foster Parents with the same **User Name**, neither Foster Parent will be able to successfully access TFACTS or have their password reset.
  - b. If there are multiple accounts with the same **User Name**, the account of the foster parent who reports being unable to log in should be locked.
  - c. A new account for the foster parent must be created with a new **User Name**.
    - i. The recommendation for the **User Name** would be to add the new account with EL\$+First three characters of First Name+First three characters of Last Name+02 (or subsequent number).
2. Verify the Foster Parent is using the correct **User Name** and password. If the Foster Parent is copying and pasting directly from the email, ask them to try typing the information directly. Sometimes a space before or after the username or password will also be copied leading to a username or password error.
3. Verify the Foster Parent is using the correct link to access TFACTS. Ask them to try logging in using **tfacts.tn.gov**.
4. If the previous steps do not resolve the issue, ask the Foster Parent to try another browser and clear the cache in their current browser. If you need assistance with instructions to clear the cache, contact your FCCR.
5. Currently there is an issue when searching Last Names that have an apostrophe in them, such as O'Neal, when the apostrophe is used the foster parent does not display in search results. The recommendation is to simply search with the first letter of the Last Name.

**You have completed this storyboard.**