




FamLink Search

Search provides workers with the ability to locate and search for information in a variety of ways. As with most areas of FamLink, access is available from more than place.

Course Icons You will see some symbols appear throughout this course. These icons are used to indicate the following:

| Icon | Function |
|---|--|
|  | This will be covered in more detail later in the course. |
|  | FYI – Helpful information related to FamLink functions |
|  | Best Practice – This is a technique that through our experience has been shown to be the most effective and efficient. |

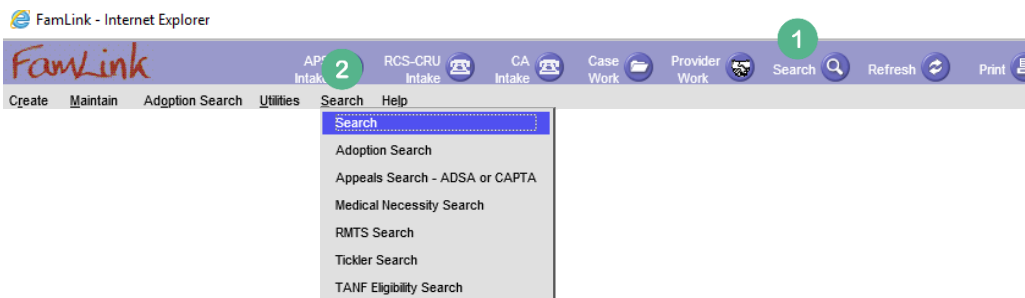
Objectives By the end of this module you should be able to:

- Conduct a Search in FamLink from multiple locations
- Filter your search results based on specified criteria
- Know the different types of searches that can be performed

Navigating Search

Once you're logged into FamLink, search can be accessed from 2 locations

- 1 Select on the search icon in the **FamLink Banner** or
- 2 Use the **Menu Bar** by clicking Search and then selecting Search in the drop down.





FamLink is a Case based system, however searches can be done by Case, Person, Provider, Worker or Intake depending on the information needed. This is controlled using tabs at the top of the Search Window.

- **Case Search:** A case search seeks information by case.
- **Person Search:** A person search looks for specific person. It brings up their demographics and historical data, as well as any case, provider or intake records the person is associated with.
- **Provider Search:** A provider search looks for a provider (daycare, foster home, group home etc.). Additionally, you can locate medical and mental health providers by using a provider search.
- **Worker Search:** A worker search locates people that are identified as CA staff members.
- **Intake Search:** An Intake search looks for all pending intakes or intakes that have already been linked to a specific case.



If FamLink returns more than 25 records, a 'Next' link displays to the right of the number of records.

Tools to help use search

The screenshot shows the FamLink search interface with tabs for Case, Person, Provider, Worker, and Intake. The 'Case' tab is selected. The 'Search Criteria' section includes fields for Last Name (Johns*), First Name (S*), Case ID, Office, Case Type, Status, Street, City, ZIP Code, and a 'by:' dropdown. Below these are checkboxes for 'Date Restricted' (checked), 'Participant View', and 'View Not Approved/Cancelled'. A 'Search Precision' slider is set to 'High', and a 'Sort By' dropdown is set to 'Alpha'. A 'Search' button is on the right. A 'Cases Returned' section is at the bottom. Numbered callouts 1 through 5 point to specific features: 1. Date Restricted checkbox, 2. Participant View checkbox, 3. Search Precision slider, 4. Sort By dropdown, and 5. View Not Approved/Cancelled checkbox.

1

Date Restricted

Limits search results. The Default is checked. It must be deselected to return all data.

2

Participant View

Returns data within the case by person.

3

Precision Slider

Limits search results. If selected, all data may not return. The Default is set to high.

4

Sort By:

- Alpha
- Case #
- Status
- Case Type
- Office

Sorts the data returned by the selected criteria.

5

View Not Approved/Cancelled

Limits search results. Launching this search type provides only information that has not been approved or cancelled. All unapproved and cancelled work will be returned.

Date Restricted: The Date Restricted box defaults to “checked.” This restricts the amount of information received when a search is done. For this type of search the system uses preset timeframes for different information types. Therefore, if something is not showing up, it could be because the date it occurred is outside of the system set timeframes for that information type. Some information fields do not have a date restriction even when the box is checked. Most workers uncheck the Date Restricted box prior to running a search to insure they get all information on a case, person or provider.

- The **Date Restricted** check box when “unchecked” will display all work and all work history.

Participant View: Selecting the **Participant View** displays the work by participants in a case rather than by category of work. A case participant’s information display will not be co-mingled with other case participant’s, making it easier to locate work for a specific participant.

When this box is checked, person level information is displayed such as: assignments, legal record, placements and services, rather than by all of the information in a case. This view is often used for locating a placement for a specific child that has been in multiple placements over an extended period of time. Using this tool pulls the information for a specific child out of the list of placements for all children in the family.

Precision Slider: Search precision is another way to limit results. When inputting a full name the search precision slider can be set to several different settings. The higher it is set the more specific it will be to name that is entered. The lower it is set tells the system to look for names that are less exact but similar to the name entered. When a wild card is input into a Name Field the precision slider is deactivated.



Tip: You can use the Precision Slider for all Search types except Intake Search.

Sort By: Clicking the **Sort By** filter allows a worker to determine the order in which the search results will be displayed. The Sort By field changes with each search tab, and is not available on the Intake Tab.

| Case | Person | Provider | Worker | Intake |
|--|--|--|--|--------|
| Sort By: <div> <div></div> <div>Alpha</div> <div>Case #</div> <div>Status</div> <div>Case Type</div> <div>Office</div> </div> | Sort By: <div> <div></div> <div>Alpha</div> <div>DOB</div> <div>City</div> </div> | Sort By: <div> <div></div> <div>Alpha</div> <div>Provider Type</div> <div>Office</div> <div>City</div> </div> | Sort By: <div> <div></div> <div>Alpha</div> <div>Office</div> <div>Job Class</div> <div>Unit</div> </div> | |

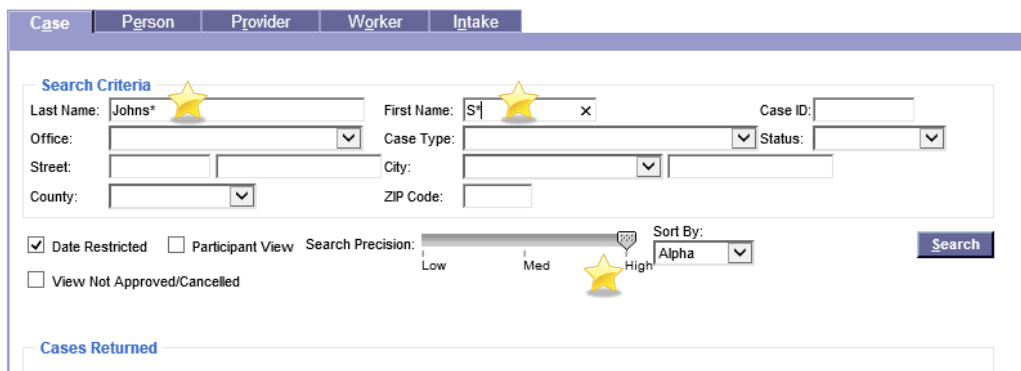
View Not Approved/Cancelled: Select the **View Not Approved/Cancelled** check box to display “not approved” or “cancelled” pieces of work in the case. If an authorization for counseling services was requested via a service referral but was never used or approved this search will pull up this referral. This tool is often used when closing a case as the authorization may need to be cancelled, prior to the case being closed.



Getting the search results you're looking for

A wildcard (*) can be included in all searches types to search for different spellings of a name. For instance, if you are not sure if a name is spelled “Sean Johnson” or “Shawn Johnsen” use the example below to search and locate all related spellings.

For example, entering the Last Name: Johns* and the First Name: S* returns all names that have a last name starting with “Johns” and all first names that start with “S.”



The screenshot shows a search interface with tabs for Case, Person, Provider, Worker, and Intake. The 'Search Criteria' section includes fields for Last Name (Johns*), First Name (S*), Case ID, Office, Case Type, Status, Street, City, County, and ZIP Code. Below these fields are checkboxes for 'Date Restricted' (checked), 'Participant View', 'View Not Approved/Cancelled', and a 'Search Precision' slider set to 'High'. A 'Sort By' dropdown is set to 'Alpha'. A 'Search' button is located at the bottom right of the search criteria section. Below the search criteria is a section labeled 'Cases Returned'.



Tip: Inputting a wild card into a Name Field will deactivate the precision slider.

A closer look at each type of search

Using Filters to Narrow Searches

- **Entering in the County, City and/or Office** can be used to narrow searches. However if the family previously had a case in another county, lived in a different city, or worked with a different office, the case may not show if these search parameters are used.
- **Date Restricted box** has a default of “selected” so it always “checked” unless you “uncheck” it. It is recommended that searches be done with the box unchecked to insure that all information associated with a case name is located.

Search options vary depending on the specific tab information displayed. Remember to use Wildcard (*) or Filters to help narrow search results; while keeping in mind to be cautious and make sure all information is collected to make sure that the search complete.

Case Search

Case search is used when searching for overall case information. Locating the case displays the specifics about a current case, historical data, people in the household, services that have been provided, prior placements and legal actions that have occurred with a specific family. Let's take a look:

You are aware that Jane Smith has an open case with the Department and you need information about when the next court hearing is on this case. You are not assigned to the case but plan to cover court for the assigned worker.

Begin by making sure the Case tab is selected. Input **Smith** into Last Name and **Jane** into First Name. The city can also be input to narrow search results. Select the **Search** button.



Entering the case ID will disable all other search fields and the system will return the exact case information.



Case ID or Last Name is needed as a minimum criteria for any case search.

Person Search

Person search is used to locate information about a specific person. It is a general good starting point when seeking information good search to do when seeking about whether a person has ever been involved with the department and if so, what cases they have been involved with. For instance; a father may be attached to more than one case, if he has children in different families. A child could be a participant in a case with the birth mother or father. Searching for a specific person is great tool to locate all of the cases that a person has ever been involved with.

Let's take a look:

As an intake worker, you are looking to see if Jane Smith has child welfare history with the Department. You know that Jane was born on 03/08/1988, and lives in Lacey Washington. However, you need to keep in mind that Jane may have lived in other cities so you may not want to include the city name in the search criteria as historical data may be omitted.

Using Jane's Date of Birth (DOB) in the search criteria could bring back more accurate data, however it will not bring back records that do not have a DOB entered. Searches often have to be tried several different ways and are only as accurate as the parameters used to locate information.



Case, Person, Provider, Workers and Intake ID's are unique - entering in the I.D. number, when known, and searching will bring up the exact information.

Case **Person** Provider Worker Intake

Search Criteria

Last Name: First Name: Person ID: SSN: ACES ID:

DOB: From: To: Gender: Tribe/Band/Nation:

Street: City: ZIP Code:

☒ Incl. AKA Search Precision: Sort By:

Low Med High

Other search criteria includes using a SSN (Social Security Number) and/or Gender to search. Gender is a great way to reduce the amount of information that is returned from a search. SSN again is limiting as it will not return data that does not include a SSN. Thinking about which filters might produce the best search results for a given situation is important when performing searches.

 **Case ID or Last Name is the minimum criteria for any case search.**

Provider Search

Provider search is used to locate information on foster homes, relative homes, private foster care agencies and private agency foster homes. It will also locate information on approved medical providers, therapists, hospitals and daycare centers.

Keep in mind providers are set up with Last Name (*no comma*) First Name.

Case Person **Provider** Worker Intake

Search Criteria

Provider Name: Provider ID: School District:

FMS Number: Parent Agency ID: Provider Type: ☐ Search Providers of Parent Agency

Doing Business As: Status: SSPS ID:

Street Number: Street Name: WA City:

City: County: Region: ZIP Code:

☒ Date Restricted ☐ View Not Approved/Cancelled

Search Precision: Sort By:

Low Med High

Let's try a search for a foster home including one or many of these combinations to locate the home.

| Provider Name | Results |
|-----------------------|--|
| Jones Su* | Jones Sue, Jones Susan, Jones Suzy |
| Jones Susan* | Jones Susan/Johnathan, Jones Susan/Samantha, Jones Susan/Kevin |
| Jones Johnathan/Susan | Jones Johnathan/Susan |
| Jones Jo* | Jones Johnathan, Jones Jon, Jones, JoAnn |
| Jones, Susan | No Results |

Search results for providers are dependent on how the names of the provider were created in FamLink. This is often done in a multitude of ways, making locating a provider challenging. In FamLink, caregiver's names are often input as their common name rather than their legal name, adding to the difficulty.

Filters can be used to search for providers. Knowing and entering the **town or county** where the family lives will quickly narrow the search results. **Provider Type** is also a great tool to use when the home is DLR Licensed or a CPA home. Choosing "open" in the **Status** field will only report homes with open foster licenses.

When searching for hospitals, day care centers or agencies the name could have been entered in a variety of ways.

Let's take a look:

As a worker, you are wanting to locate the provider record for Providence St. Peters Hospital.

Try searching for: Providence * - This will return approximately 250 providers.

Try narrowing the search by searching for: Providence St Pe* This only returns 6 providers.

Try filtering by putting in the County as well as Providence* - This search will return all the clinics in that county that have Providence in their name. This search returns 10 providers for Thurston County.



When performing a Provider search: Provider Name, Doing Business As, SSPS ID, and City can all be used as sole search criteria.



Remember: No Comma after Last Name – when searching by Name for Providers.

Worker Search

Worker search is used to locate a worker's information such as: Job Title, Phone Number, Location, Region, and Supervisor's name. To perform a worker search enter the worker's name Last and First.

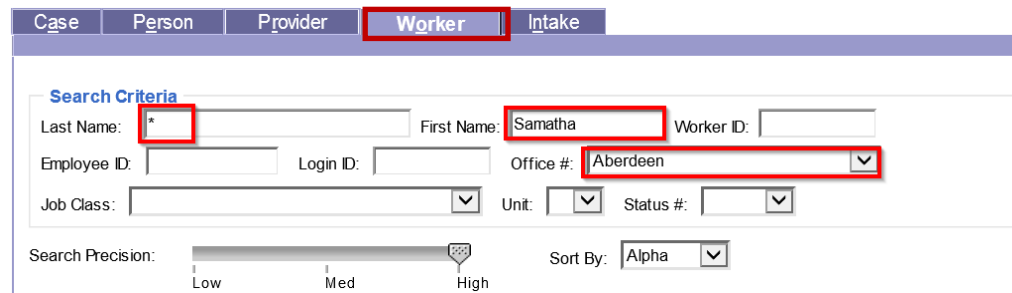
A screenshot of the FamLink software interface showing the 'Worker' search tab. The 'Worker' tab is highlighted with a red box. Below the tabs is a 'Search Criteria' section. It contains several input fields: 'Last Name:' (with a red box around it), 'First Name:' (with a red box around it), 'Worker ID:', 'Employee ID:', 'Login ID:', 'Office #:' (with a dropdown arrow), 'Job Class:' (with a dropdown arrow), 'Unit:' (with a dropdown arrow), and 'Status #:' (with a dropdown arrow). At the bottom, there is a 'Search Precision' slider ranging from 'Low' to 'High' (with a red box around the 'High' end) and a 'Sort By:' dropdown menu set to 'Alpha'.

When not sure of the spelling keep in mind that a wildcard * can be entered to help. The wildcard can be entered in either field.

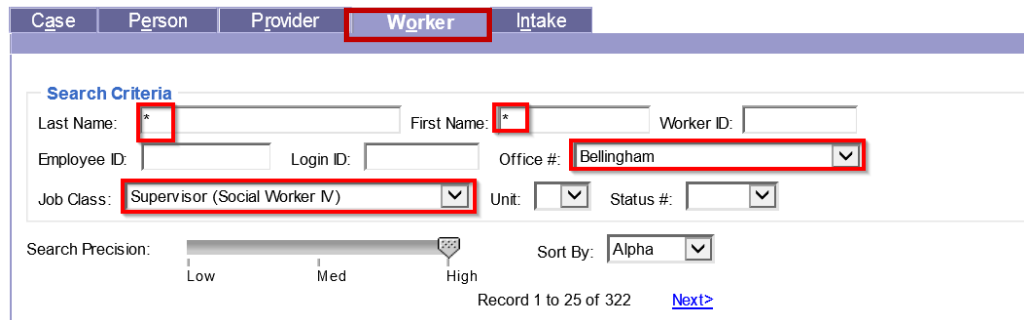
Let's take a look:

You are a worker seeking to find the worker, Samantha that has information on a case recently transferred to you.

Since you know that Samantha works in the Aberdeen Office, you could search like this.



Leaving both the Last and First Name fields blank and selecting the office in the Office # field will return all employees in that Office. Search results can be narrowed by selecting the Job Class of the person. Since you know that Samantha is a Supervisor (Social Worker IV) in this office you might search like this:



Tip: Last Name, Worker ID, and Employee ID can all be used as sole search criteria. Keep in mind the Employee ID is the DSHS ID that is given when an employee is hired; it is not created by FamLink.

Intake Search

Any worker has the ability to search FamLink for Intakes within the FamLink system. Normally a search is done to locate intakes for a specific program (CPS, CFWS, FAR) and for a specific Region within a specific timeframe.

Note: The Received Date defaults to today's date to the prior 60 days from today's date. Note when searching you can modify the dates to the timeframe desired.

| Case | Person | Provider | Worker | Intake |
|------|--------|----------|--------|--------|
|------|--------|----------|--------|--------|

Search Criteria

Intake Type: ▼ Intake ID:

Final Screening Decision: Received Date: From: 06/03/2017 To: 08/02/2017

Reason: Response Time: Provider Type:

Region Created: Office Created: Region Assigned: ▼

Participant Person ID: Worker Login ID: Worker ID:

Sort By:

Date Received

Search

Other Filters are available and will help to locate specific Intakes. This is frequently used prior to an Intake or Intakes being linked to a specific case. If you have an Intake ID number this Field can be used to locate a specific intake.



Tip: You can use Intake ID or From and To dates as sole search criteria. However, there can be no more than 60 days between the From date and the To date.