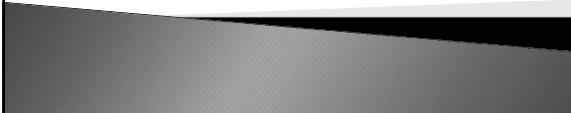


Presenter: Renetta Walk

# SSIS Version 5.5 External Documents

**Worker Mentor Meeting**  
April 14, 2011



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## External Documents

An external document is a link created by SSIS or your agency to internal or external resources. Documents may include links to:

- ▶ DHS Bulletins or related state forms
- ▶ Minnesota Statute or Rule
- ▶ SSIS training materials
- ▶ External websites, videos, documents
- ▶ Agency internal material that is often stored on your network drive.

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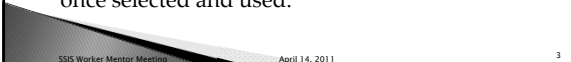
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## External Documents

- ▶ A new feature allows workers to access external documents.
- ▶ Agencies can add a link to an external document using the new External Documents feature to make them readily available to staff without searching for them.
  - For example: Commonly-used assessment tools that are not located on eDocs or within Chronology
- ▶ External documents do not display in Chronology once selected and used.

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### External Document Benefits

- ▶ SSIS has preloaded many commonly-used documents from eDocs and blank service plans for local agencies.
- ▶ External Documents are searchable.
- ▶ Agencies may create a list of commonly use documents.
  - Similar to a *Favorites List!*

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### External Document Benefits

- ▶ The external document becomes available for your staff immediately upon saving the link to the document.
- ▶ External Document search provides the worker easy access to external documents.
- ▶ All workers have security rights to access External Documents.

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### How do I Search for an External Document?

- ▶ Identify the desired external document.
  - For example, search for and print a blank Service Plan.
- ▶ Access **External Documents** and view list.
- ▶ It's that easy!

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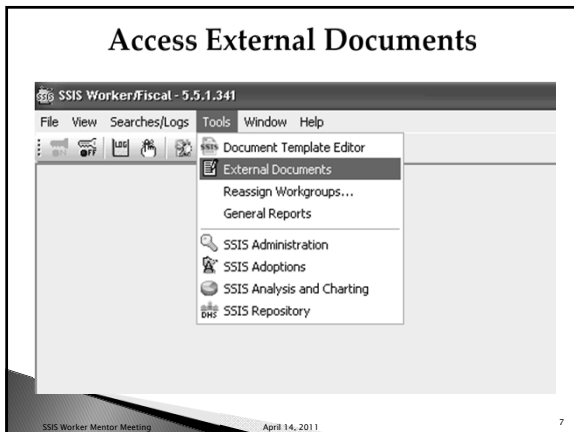
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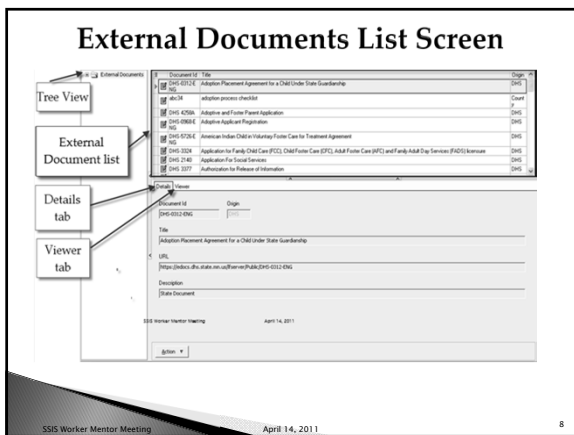
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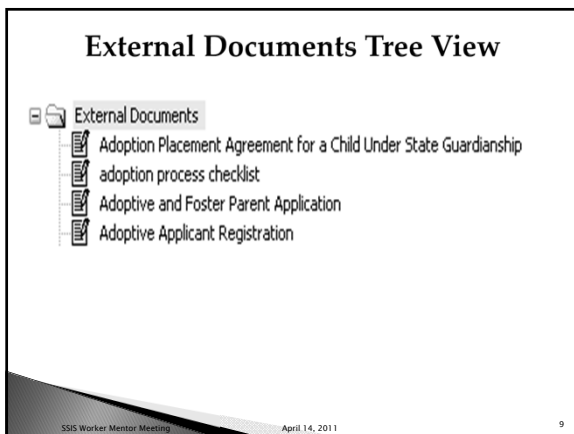
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### External Documents List

Document Id	Title	Origin
DHS-0312 ENG	Adoption Placement Agreement for a Child Under State Guardianship	DHS
abc34	adoption process checklist	County
DHS K25A	Adoptive and Foster Parent Application	DHS
DHS-0969 ENG	Adoptive Applicant Registration	DHS
DHS-5726 ENG	American Indian Child in Voluntary Foster Care for Treatment Agreement	DHS
DHS-3324	Application for Family Child Care (FCC), Child Foster Care (CFC), Adult Foster Care (AFC) and Family-Adult Day Services (FADS) licensure	DHS
DHS-2140	Application For Social Services	DHS
DHS-3377	Authorization for Release of Information	DHS
DHS-3235	Background and Health History - All Children in Out-of-Home Care	DHS
DHS-3205	Birth Parent Social and Medical History	DHS
oah test document		County
DHS-5727 ENG	Child in Voluntary Foster Care for Treatment Agreement	DHS

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- ### External Documents List
- ▶ The External Documents list contains all of the preloaded state external documents, including some documents that were formerly located in SSIS Chronology.
    - Example: The CMH Screening Notice that is required for all CPS and placement cases.
  - ▶ Once you create a new External Document link, the external document will display in this list ready to be used by the workers in your agency.
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### Properties Display on Details Tab

Details | Viewer

Document Id	Origin
DHS-2140	DHS
Title	
Application For Social Services	
URL	
<a href="http://edocs.dhs.state.mn.us/Server/Legacy/DHS-2140-ENG">http://edocs.dhs.state.mn.us/Server/Legacy/DHS-2140-ENG</a>	
Description	
State Document	
Action ▼	

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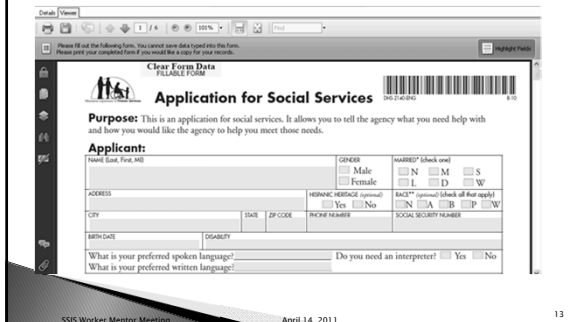
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### Document Displays on Viewer Tab

- ▶ You can fill out and print the document, but it does not save in SSIS.




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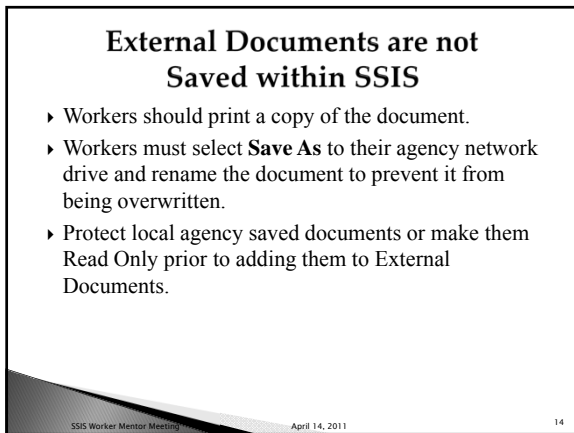
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### External Documents are not Saved within SSIS

- ▶ Workers should print a copy of the document.
- ▶ Workers must select **Save As** to their agency network drive and rename the document to prevent it from being overwritten.
- ▶ Protect local agency saved documents or make them Read Only prior to adding them to External Documents.




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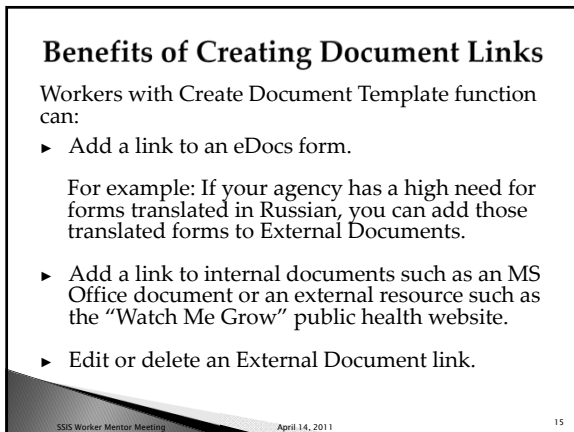
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### Benefits of Creating Document Links

Workers with Create Document Template function can:

- ▶ Add a link to an eDocs form.  
For example: If your agency has a high need for forms translated in Russian, you can add those translated forms to External Documents.
- ▶ Add a link to internal documents such as an MS Office document or an external resource such as the "Watch Me Grow" public health website.
- ▶ Edit or delete an External Document link.




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### Links to External Document

Web Site Address or URL

https://edocs.dhs.state.mn.us/loSearch/LOSearch.jsp

Network File Location

Address M:\Everyone\Policy - Child\Child Maltreatment

Folders X CM\_Surveillance-a.pdf

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### Available Website Address or File Location

- ▶ Prior to creating an External Document link:
  - You must have the website address or file location available.
  - Copy the file location or website address so it can be pasted later into the URL field.

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### Add a Link to a Document

Document List Table

Details View

Document ID: [ ] Origin: [ ]

Title: [ ]

URL: [ ]

Description: [ ]

External Documents Context Menu

- New External Document
- Print
- Print All
- Save
- Cancel
- Delete

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### To Add a Link to a Document

1. Open **External Documents**.
2. Access the **Action** menu and select **New External Documents**.
3. On the **Details** tab enter a **Document ID**, **Title**, and **Description**.
4. Paste the URL or file location into the **URL** field.
5. Click **Save**.

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### How and Why to Edit

Workers with Create Document Template function can edit an External Document link.

- ▶ If DHS changed the link to an eDocs form or you rename a document on your network
- ▶ If you want to change the Document ID, name of the external document or update the Description of the document.

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### Edit Details Tab

To edit an External Document link:

1. Select the document in the grid.
2. Enter changes to fields on the **Details** tab.
3. Click **Save**.

The Origin field is not editable.

**Hint:** Agencies should develop a process of notification if a link fails and needs correcting so the Document Template Creator can fix the link.

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## How and Why to Delete

Workers with Create Document Template function can delete an External Document link.

- ▶ You can delete your own agency's external documents at any time.
- ▶ If you created a link and later determined it is not needed, it can be deleted.



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## Delete Links to External Documents

- ▶ Links to external documents may be deleted at any time.
- ▶ To delete an External Document link:
  1. Select the document in the grid.
  2. Access the **Action** menu and select **Delete**.

**Hint:** Agencies should develop a process to notify staff when you delete a link so staff know why it is missing.

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