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SSIS Version 12.1

Replace Local Agency

**Headers and/or Footers
on Document Templates**

Worker Mentor Meeting

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Replace a Header or Footer

Document Template Creators can replace one header and/or footer with another header and/or footer without requesting a data fix:

- Once a Headers/Footers template is changed, the change becomes effective from that date forward.
- Workgroup documents created and finalized prior to a replacement will retain the original header/footer.

Hint: Use Setup State Templates>Change Headers/Footers, or replace by changing an individual template.

Replace Headers/Footers on Local Agency Templates

Document Template Creators can:

- Change a header and/or a footer on Active Local Agency templates.

Example: Your agency decides to relocate its Children's Mental Health staff to a new address. You can now change the letterhead on individual templates related only to Children's Mental Health services.

Replace the Header on a State Template

Document Template Creators can:

- Change the First Page Header on an individual State Template that requires a local agency header.

Example: Your agency previously associated a “blank” header to the CPS Notice of Determination and would now like to use agency letterhead as the document header.

Hints:

- You do not need to associate a header on State templates that did not require a header in the past.
- You do not need to re-associate headers to State templates that you have already associated to in the past.

Replace the Header on a State Template

Recommendation:

- Create an Agency notification process to provide information to case workers identifying which templates were changed.

Replace Headers and/or Footers on Active Local Agency Templates

Template List

The screenshot shows the 'Template List' application window. At the top is a table listing templates. The third row is selected and highlighted in yellow:

| Template Name | Status | Category | Type | Group | Document Template # |
|---|--------|---------------------------|---------------|--------------|---------------------|
| Release New Template Use for Export 1 | Draft | Child Protective Services | Workgroup | Local agency | 10135504 |
| release service plan 5-26-11 | Active | Child Protective Services | Service Plans | Local agency | 10138136 |
| Release Template- Use to Show the Change Header or Footer Fea | Active | Child Protective Services | Workgroup | Local agency | 10135547 |

Below the table is a detailed view of the selected template (ID: 10135547). The 'Layout' section at the bottom contains four fields for headers and footers, each with a drop-down arrow:

- First page header: Release Agency Address 2 (5/31/2011) a
- Subsequent header:
- First page footer:
- Subsequent footer:

A callout box on the right side of the layout section contains the following text: "Select the replacement First page header, Subsequent page header, First page footer and/or Subsequent page footer from the respective drop-down menu." Four arrows point from this callout box to the drop-down arrows of the four layout fields.

To Replace Headers and/or Footers on Active Local Agency Templates



1. Highlight an active Local Agency template in the Template List grid.
2. Select the **First page header**, **Subsequent header**, **First page footer** and/or **Subsequent footer** drop-down menus to select the replacement header and/or footer.
3. Click **Save**.

Replace the First Page Header on an Individual State Template

Template List

The screenshot shows the 'Template List' application window. At the top is a table listing templates. The 'CPS Notice of Determination' template is selected and highlighted in blue. Below the table is a detailed view of the selected template, including fields for document template number, type, group, name, format, document identification, status, last edited by, and description. At the bottom is a 'Layout' section with dropdown menus for 'First page header', 'Subsequent header', 'First page footer', and 'Subsequent footer'. A callout box with an arrow points to the 'First page header' dropdown menu, containing the text: 'Select the replacement header from the First page header drop-down menu.'

| Template Name | Status | Category | Type | Group | Document Template # |
|------------------------------------|---------------|----------------------------------|------------------|--------------|---------------------|
| CPS Notice of Assessment Summary | Active | CP Family Assessment | Workgroup | State | 116934 |
| CPS Notice of Determination | Active | Child Protective Services | Workgroup | State | 180885 |
| CPS Summary Disposition Notice | Active | Child Protective Services | Workgroup | State | 150079 |

Template details for 'CPS Notice of Determination':

- Document template #: 180885
- Type: Workgroup
- Group: State
- Category: Child Protective Services
- Name: CPS Notice of Determination
- Format: Letters
- Document identification: 1/24/2012
- Create date: 01/24/2012 01:58 pm
- Status: Active
- Status date: 01/24/2012
- Last edited by: Walk, Renetta
- Last changed date: 01/27/2012

Layout settings:

- First page header: Renetta's Header Template 3-31-10
- Subsequent header: SSIS one inch margin header
- First page footer: SSIS footer
- Subsequent footer: SSIS footer

To Replace the First Page Header on an Individual State Template



1. Highlight a State template in the Template List grid.
2. Select a **First Page header** and select the replacement header.
3. Click **Save**.



Refreshing Headers/Footers

New Feature Available for Workers who
Create Documents and/or Service Plans

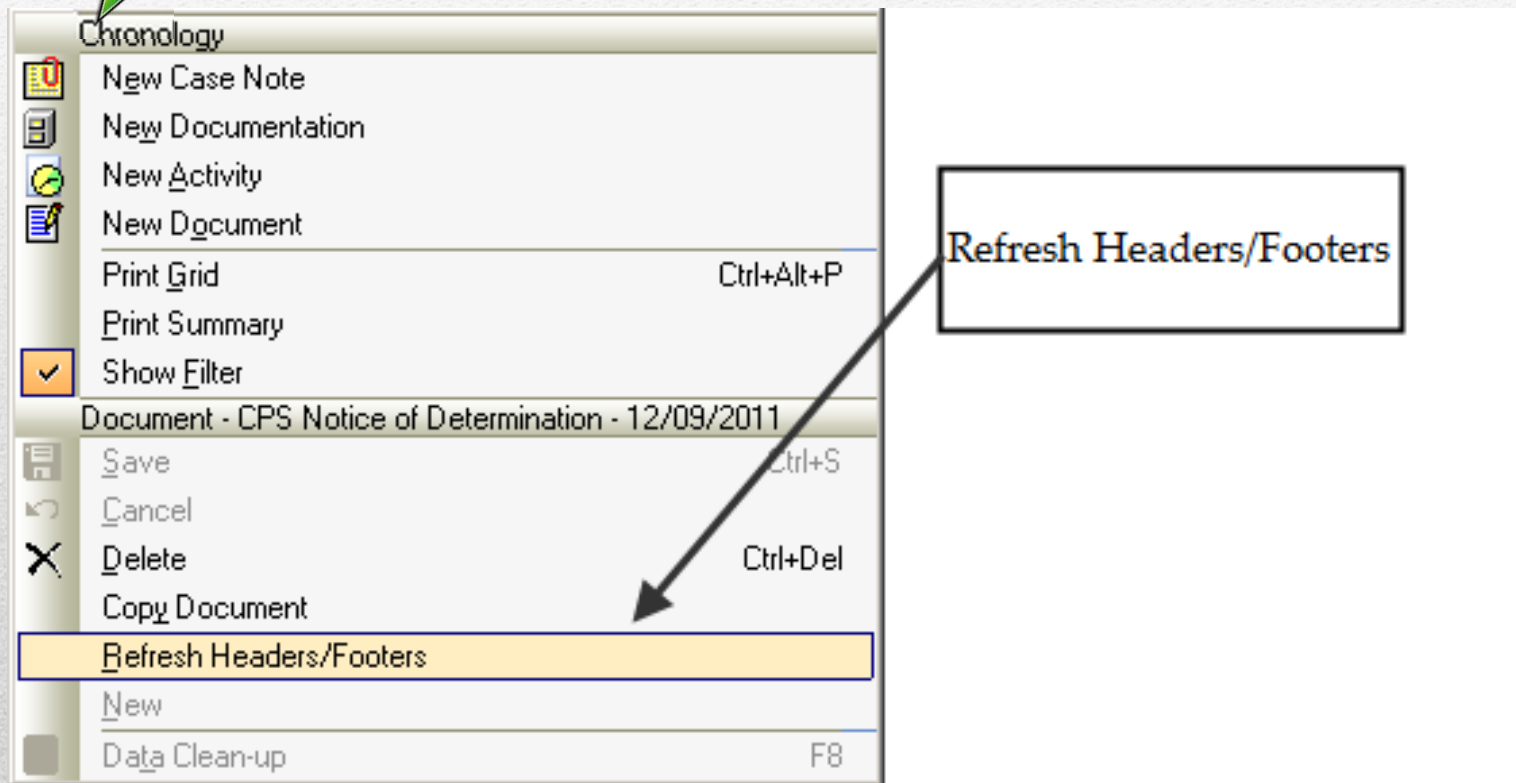
Refresh Headers/Footers on Documents and Service Plans

Case Workers:

- Can refresh a header and/or footer on a document or service plan that is in Draft status
- Should receive notification, from your agency's Document Template Creator to identify which templates received a new header and/or footer
- Do not need to select Refresh Headers/Footers if the document/service plan was created as desired.

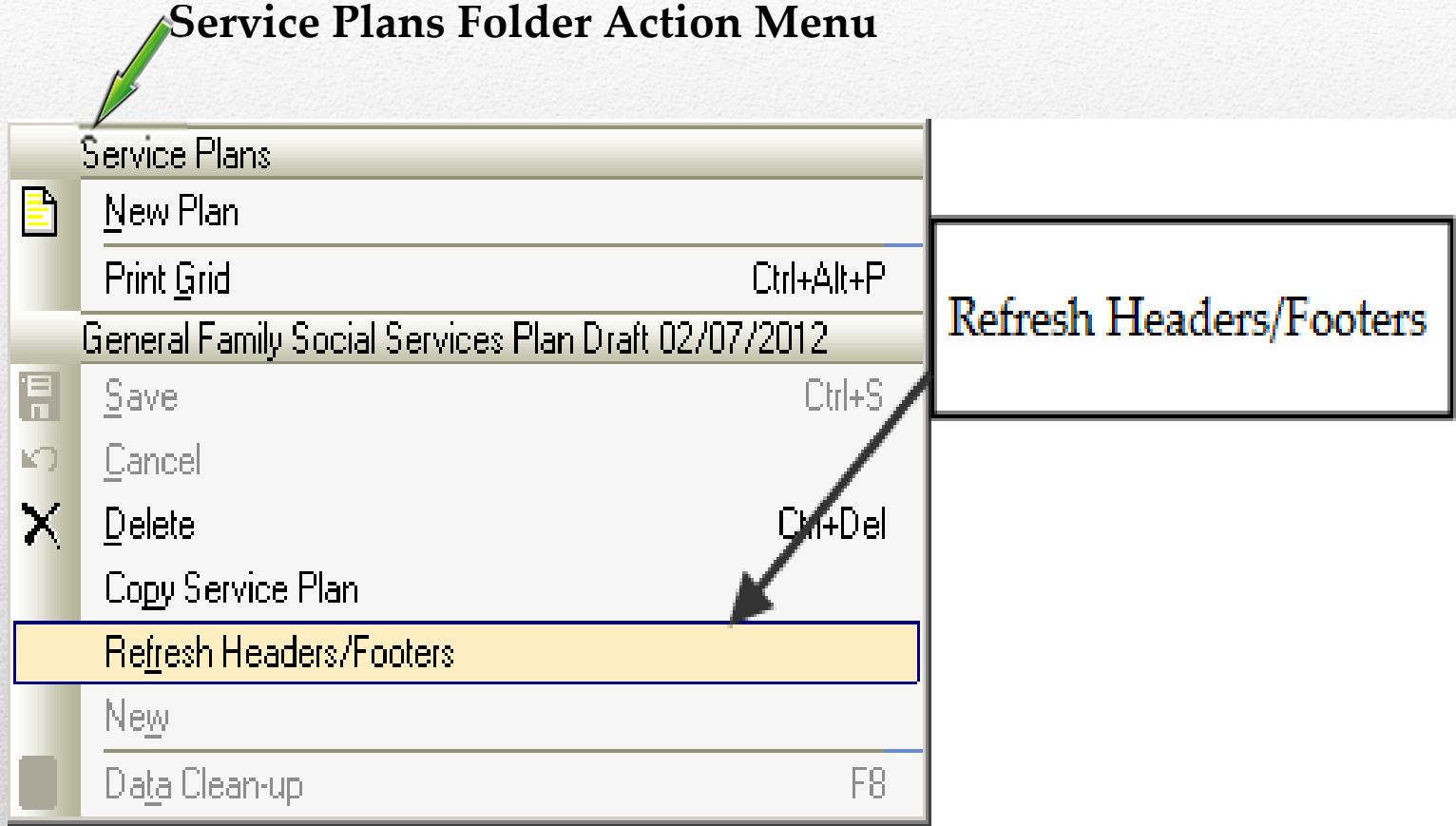
Refresh Headers/Footers on Documents

Chronology Folder Action Menu



Refresh Headers/Footers on Service Plans

Service Plans Folder Action Menu



To Refresh a Header and/or Footer on a Document and/or Service Plan



1. Access the **Action** menu from the **Chronology** or **Service Plans** folder.
2. Select **Refresh Headers/Footers**.



Refresh a Header and/or Footer on a Document or Service Plan

Hints:

- The Refresh Headers/Footers feature is only available on Draft status documents/service plans created prior to a Header/Footer change by the Document Template Creator.
- The Refresh Headers/Footers feature is disabled for Finalized documents as well as Active, Inactive or Discarded service plans.

Refresh a Header and/or Footer on a Document or Service Plan

Hints:

- If a worker Finalizes a document and/or Activates a service plan right away, he/she does not need to select the Refresh Headers/Footers option.
- Workers who want to refresh the header and/or footer on documents/service plans, no longer in Draft status, must copy the document/service plan first, in order to select the Refresh Headers/Footers option.

Workflow



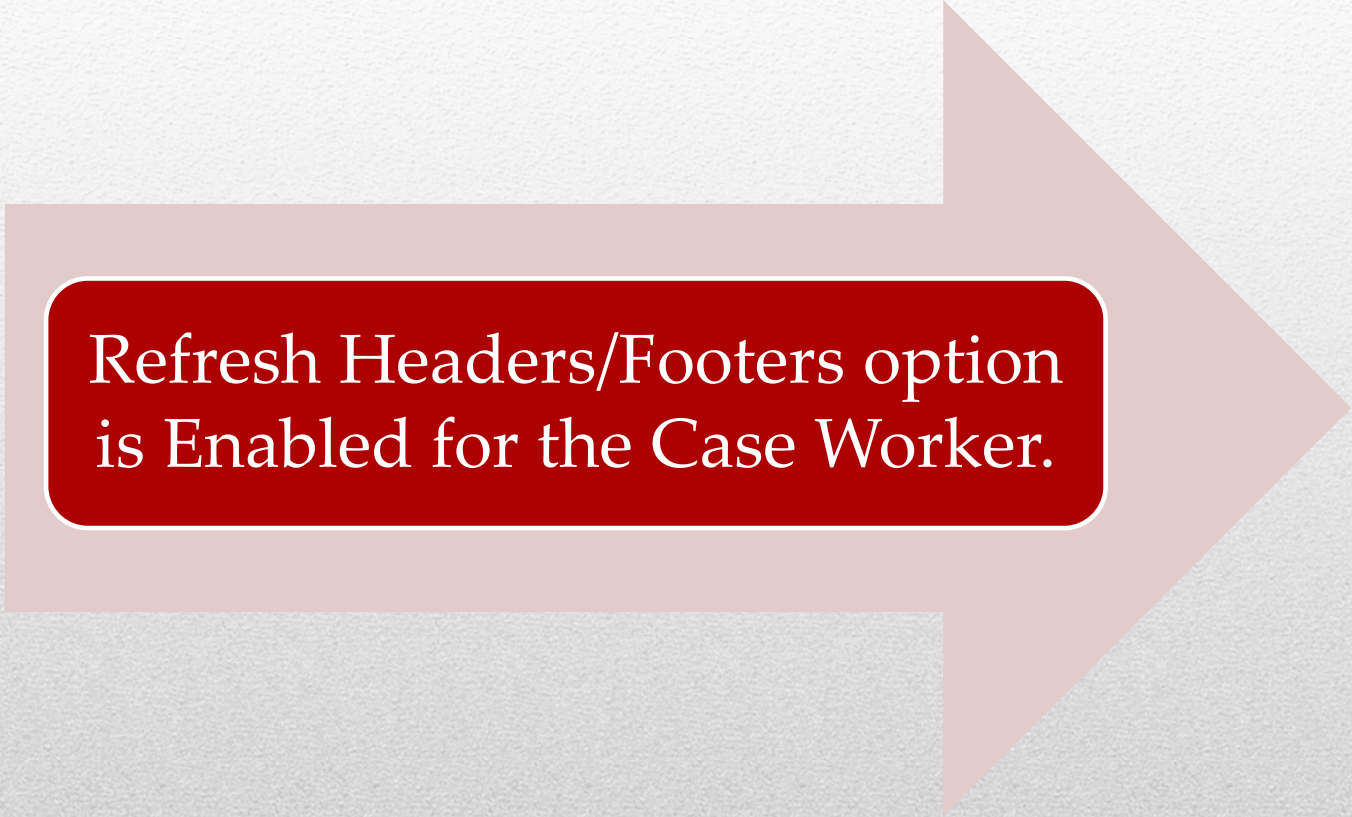
Case Worker creates a Document or Service Plan (Remains in Draft Status).

Workflow



Document Template Creator Replaces
Header and/or Footer and sends
notification to agency staff.

Workflow



Refresh Headers/Footers option
is Enabled for the Case Worker.

Workflow



Case Worker receives notification with the name of the template that was changed from Document Template Creator.

Workflow



Case Worker determines if they need to refresh the headers and/or footers on a Document and/or Service Plan.

Workflow

If a New Header/Footer is needed on the Document/Service Plan:



The Case Worker must select the Refresh Headers/Footers option.

If a New Header/Footer is NOT needed on the Document/Service Plan:



No Action Needed.



Questions