

Presenter: Renetta Walk

# SSIS Version 12.1 Replace Local Agency Headers and/or Footers on Document Templates

Worker Mentor Meeting  
February 21, 2012

---

## 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 with columns: Template Name, Status, Category, Type, Group, and Document Template #. The table lists three templates, with the third one selected. Below the table is a detailed view of the selected template, including fields for Document template #, Group, Name, Format, Document identification, Status, Last edited by, Description, and Layout. The Layout section has dropdown menus for First page header, Subsequent header, First page footer, and Subsequent footer. A callout box on the right says 'Select the replacement First page header, Subsequent page header, First page footer and/or Subsequent page footer from the respective drop-down menu.' Arrows point from this callout to the corresponding dropdown menus in the Layout section.

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 Fe	Active	Child Protective Services	Workgroup	Local agency	10135547

## 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

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 Deposition Notice	Active	Child Protective Services	Workgroup	State	150079

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
Description:			
Layout:			
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		

Select the replacement header from the **First page header** drop-down menu.

## 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

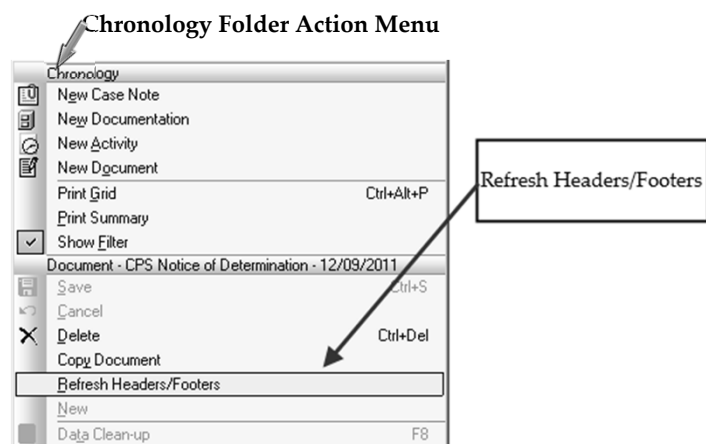
New Feature Available for Workers who Create Documents and/or Service Plans

## Refresh Headers/Footers on Documents and Service Plans

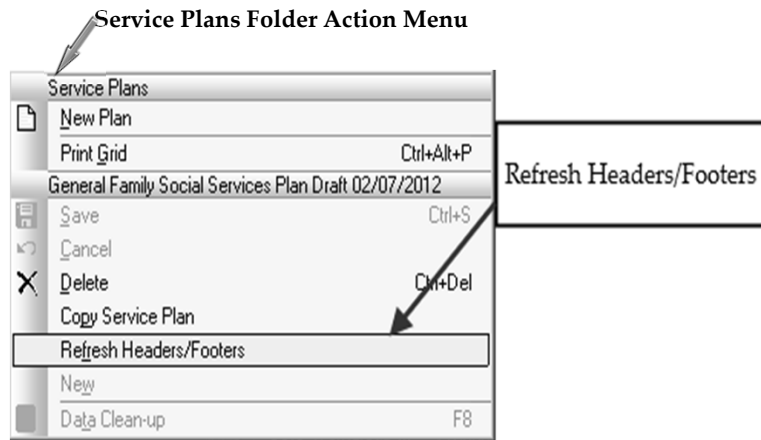
### Case Workers:

- 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



## Refresh Headers/Footers on Service Plans



## 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:*

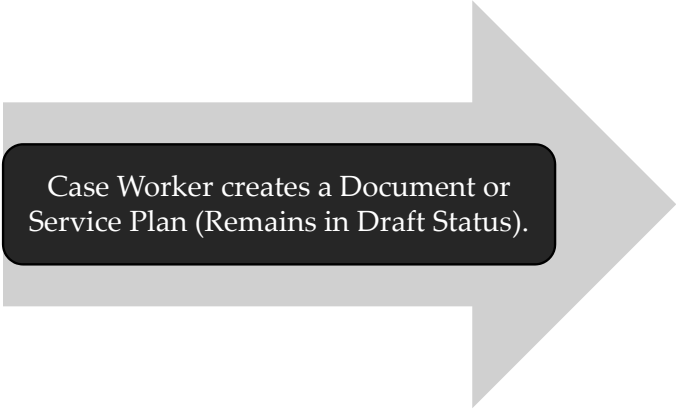
- The Refresh Headers/Footers feature is only available on Draft status documents/service plans created prior to a Header/Footer change by the Document Template Creator.
- The Refresh Headers/Footers feature is disabled for Finalized documents as well as Active, Inactive or Discarded service plans.

## 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

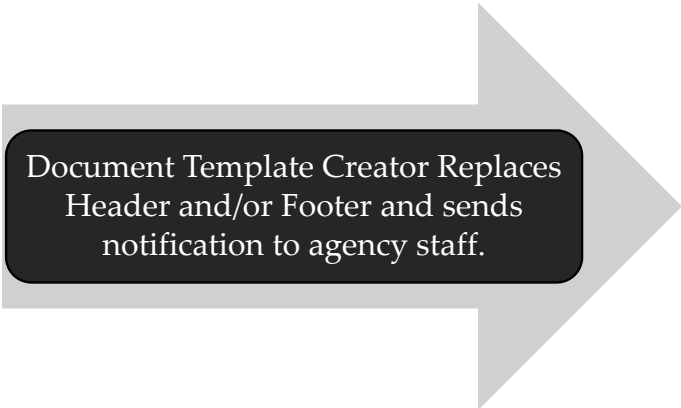


Case Worker creates a Document or Service Plan (Remains in Draft Status).

---

SSIS Worker Mentor Meeting February 21, 2012 17

# Workflow

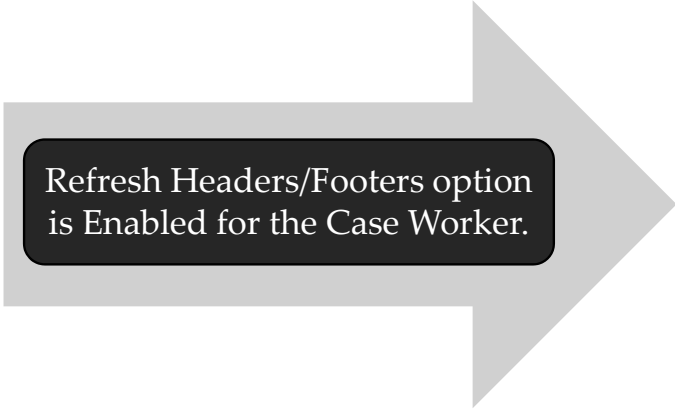


Document Template Creator Replaces Header and/or Footer and sends notification to agency staff.

---

SSIS Worker Mentor Meeting February 21, 2012 18

# Workflow




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

---

SSIS Worker Mentor Meeting February 21, 2012 19

# Workflow

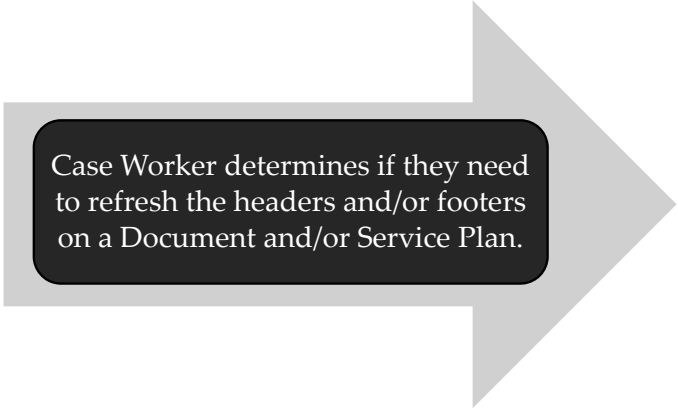


Case Worker receives notification with the name of the template that was changed from Document Template Creator.

---

SSIS Worker Mentor Meeting February 21, 2012 20

# Workflow



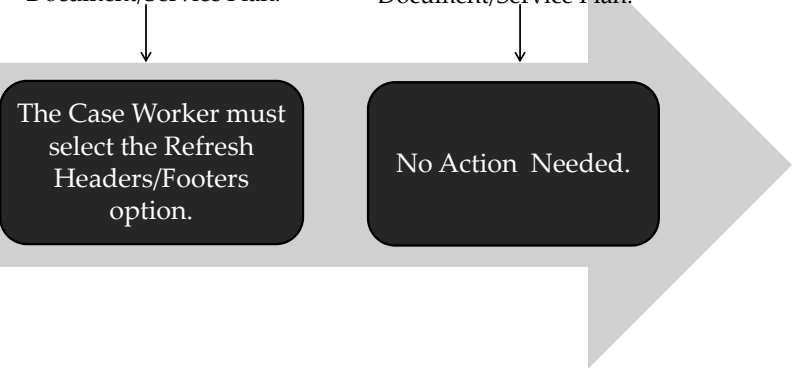
Case Worker determines if they need to refresh the headers and/or footers on a Document and/or Service Plan.

---

SSIS Worker Mentor Meeting                      February 21, 2012                      21

# Workflow

<p>If a New Header/Footer is needed on the Document/Service Plan:</p> <p>↓</p>	<p>If a New Header/Footer is NOT needed on the Document/Service Plan:</p> <p>↓</p>
<p>The Case Worker must select the Refresh Headers/Footers option.</p>	<p>No Action Needed.</p>



---

SSIS Worker Mentor Meeting                      February 21, 2012                      22

# Questions