



What can be attached?

- Text files (.doc, .rtf, .txt)
- PDF files (.pdf)
- Images (.bmp, .png, .jpg)
- Scanned Items (.img, .pdf)
- Audio (.mp3, .wav)
- Video (.mp4)
- PowerPoint (.pptx)
- Excel (.xls)
- Compressed files (zip)
- *There is no set list of file types at this time.*



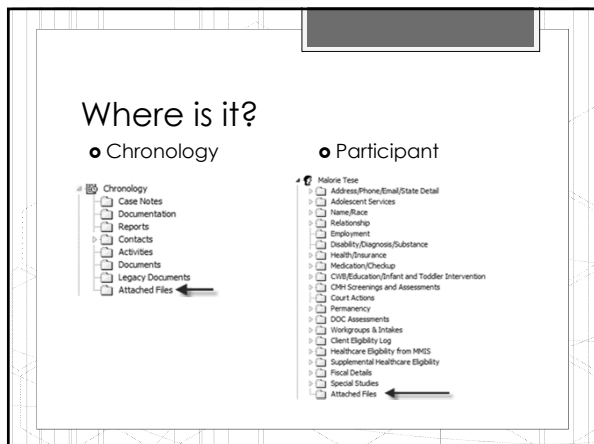
Do NOT use this for data that is already recorded in SSIS on another screen or document.

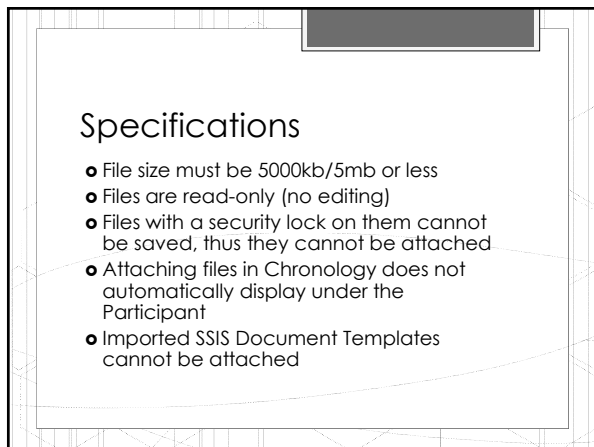


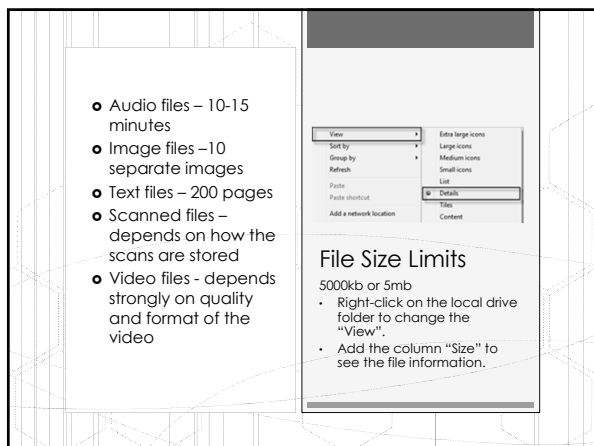
It is not a replacement for the the normal functions of SSIS.

What does it do?

- Add various file types to SSIS
- Files can follow the workgroup or a Person record
- View files as created in the original format
- Save to a local drive
- As long as you can save it, you can attach it
- Files are encrypted and compressed
- Other users with access to the workgroup or Participant can view the attached files








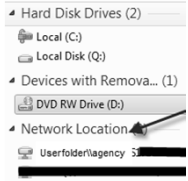
Things still in the works...

- Print as a part of the Chronology Summary Report
- Chronology filter option
- "Type" column in the Chronology grid




How to use it...Step 1

Save the file to the local drive



Reminder!!

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Step 2

Expand the Chronology or Participant node.

The screenshot shows a software interface with a tree view on the left and a detailed view on the right. The left tree view has 'Chronology' expanded, showing sub-items like 'Case Notes', 'Documentation', 'Reports', 'Contacts', 'Activities', 'Documents', 'Legacy Documents', and 'Attached Files'. The right view shows a list of participants: 'Peggy G Pyrnees, V', 'Leon Berger, II', and 'Malorie Tese'. Under 'Participants', a list of categories is shown, including 'Address,Phone,Email/State Detail', 'Abusement Services', 'Name,Race', 'Relationship', 'Employment', 'Disability,Diagnosis,Substance', 'Health,Insurance', 'Medication,Checkup', 'CVR,Education,Infant and Toddler Inc', 'CHR Screenings and Assessments', 'Court Actions', 'Permanency', 'SOC Assessments', 'Workgroups & Intakes', 'Client Eligibility Log', 'Healthcare Eligibility from HHS', 'Supplemental Healthcare Eligibility', 'Fiscal Details', 'Special Studies', and 'Attached Files'. Arrows point to the 'Attached Files' item in both the tree and the list.

Step 3

Access the Action menu to find "New Attached File."

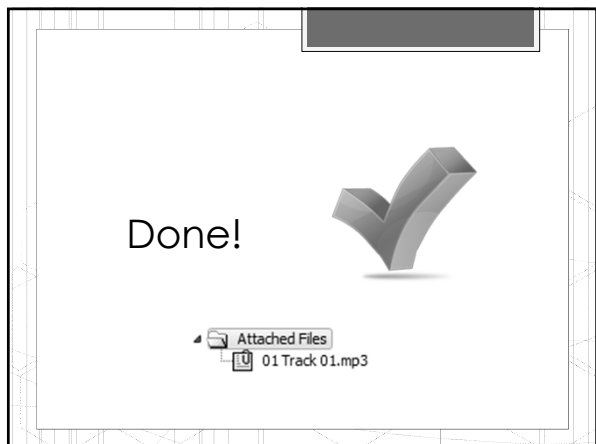
The screenshot shows a circular 'Action' menu with a dropdown arrow. Below it, a list of actions is displayed: 'New Attached File', 'Print Grid' (Ctrl+Alt+P), and 'Data Clean-up' (F8). The 'New Attached File' option is highlighted.

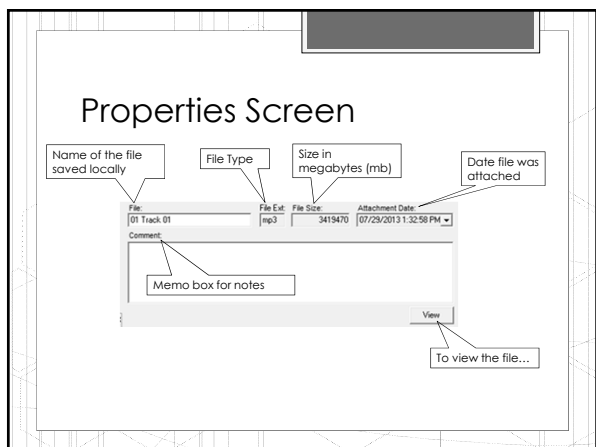
Step 4

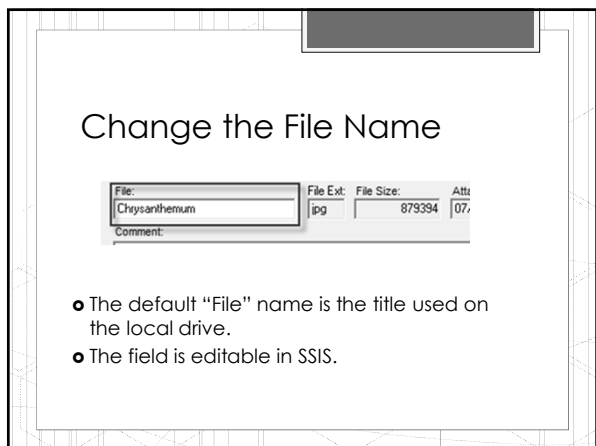
- The local drive folder displays.
- Find and select the desired file (Click the "Open" button).

Name	Date modified	Type	Size
01 Track 01	07/23/2013 10:52 ...	MPEG Format Sound	3,380 KB

Example file: This is an audio file.

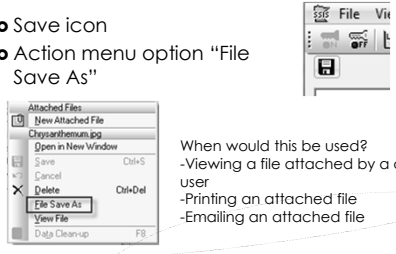






Save to the Local Drive

- Save icon
- Action menu option "File Save As"




When would this be used?

- Viewing a file attached by a different user
- Printing an attached file
- Emailing an attached file

How does this affect External Documents?


- External Documents are unrelated to this functionality.
- External Documents is a list of links or file paths.



External Documents versus Attached Files

External Documents	Attached Files
<ul style="list-style-type: none">• Links to an external file that is not stored in SSIS• No direct relationship to a specific record	<ul style="list-style-type: none">• Files are stored in SSIS• Follows a Workgroup or Participant record

- The edocs are managed by a separate department.
- The creators implemented a security lock that prevents anyone (including SSIS) from saving the documents.
- However...several edocs no longer have the security lock.




What about edocs?

Edocs
≠
External Documents


Which edocs can be attached?

This message indicates the document is locked.*



*A prompt will also display.

This message displays on documents that can be saved.



User Functions and Security

- No new user functions were added for attaching or viewing Attached Files.
- Any users who can view a workgroup and/or a Person can view and attach files.
- Attached Files is not viewable from the State Detail screen.
- Other agency users with Statewide Case Access can view Attached Files.

Intakes and Transitions


- Files attached to an Intake Chronology do not display in the Assessment/Case Management workgroup Chronology.
- The files are available in the Associated Workgroups node under the Intake.
- Files attached to a workgroup Chronology display when using the WG Change Log node to transition an Assessment or Case Management workgroup.
- Creating a new workgroup (e.g. open Assessment workgroup and open Case Management workgroup) does not retain Attached Files.

Associated Workgroups
Tese Malorie CP Intake 06/19/2013

WG Change Log

Miscellaneous Information

- Agencies with a current Electronic Document Management System (EDMS)...SSIS is not an independent EDMS. The Attached Files function is not intended to replace an agency's EDMS.
- Workstation performance...performance is dependent on the originating file type, but no significant problems have been noted.



Agency Considerations

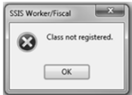
- What kinds of files will workers attach?
- Where are files usually stored, and do workers have easy access to them (locally)?
- Who should be attaching files?
- What can/should be copied and pasted into the editor versus what should be attached?
- Which files should be attached to a Person record versus a workgroup Chronology? For example, should CPS pictures follow the workgroup or person?

Agency Policy and Procedure


- Agencies should develop policy and guidelines for workers regarding the usage of Attached Files.
- Use the Agency Considerations as a starting point for this discussion.

Troubleshooting

An error message displays when trying to attach a file.



- Talk to your IT department regarding a file that needs to be installed on the workstation.
- Instructions for installation were emailed prior to version 13.3 release.



Don't Forget...

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