Mindshare TeleShare™

User Guide

TeleShare™ for:

Tracking and Analytics for Children and Families

TACF™

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CONTRIBUTORS
Written by Mindshare Consulting Group, LLC, d/b/a Mindshare Technology
Engineering contributions by Greg Povolny, Ed Schmitt, Jonathan Floyd, And Mike Policarpio.

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3837 Northdale Boulevard
Suite 329
Tampa, FL 33624
USA
Technical Support: 813-949-3293 x222
support@mindshare-technology.com

Mindshare Consulting Group, LLC

TABLE OF CONTENTS

TABLE OF FIGURES

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Mindshare Consulting Director of Licensing
Mindshare Consulting Group
3837 Northdale Boulevard
Suite 329
Tampa, Florida 33624

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User Information

This book is intended to provide a comprehensive understanding of how to use Mindshare's TeleShare™ module for the Lead Agency TACF Portal and remote users who will participate in a face to face video conference (TeleVisit™). This user guide is specific to the TeleShare module. This is not a complete overview of every feature of Tracking and Analytics for Children and Families (TACF™), the Mindshare Portal, as offered a separate module withing Mindshare's Service Offering.

Preface

This book provides instruction to end users about the Mindshare TeleShare™ module and how it interacts with FSFN for Case Notes and Photographs directly from staff or a case managers desktop or laptop.

Who should read this book

This book is mainly for experienced case managers or CBC staff who already have an understanding of FSFN and have a case load or are responsible for one or more children in a case. Those who are new to Mindshare's offering should receive internal training by your Lead Agency on both the Mindshare web portal and the TeleShare™ module itself. If you are a data specialist or involved in data quality, you may find TeleShare™ useful especially if your responsibilities will include case file reviews, Staffings and other case planning activities. NOTE: the features discussed in this book are not related to the Mindshare Mobile App. The Mindshare Mobile App is a separate feature that is unrelated to TeleShare™.

What you need to know to understand this book

You must be able to understand the concepts of FSFN as well as how to navigate the Mindshare Portal. You should have received initial training from your Agency previously on both Mindshare and FSFN. You will also require a basic understanding of how to use a secure web browser specifically using Chrome. A large portion of the functionality and usability of TeleShare™ relates directly to the review of one's case load combined with the updating of case notes, and photographs as well as the video conference feature. Please note that the video conference does not require any specific assignment to the case and can be used at any time with one or more remote parties, however. The video conference and TeleShare™ features are only available at the Case Workspace within TACF™, the Mindshare Portal.

What is not covered in this book

Application programming and use of the software development kits are not covered in this User Guide. Administration, deployment and distribution of Mobile Apps or the supported devices are not covered in this user guide. Guidance for data extraction, data imports or web services programming is available in the *TACF Programmers Guide* and covers background information on how to implement or design TACF interfaces, Data Agents or access to the Mindshare data warehouse.

Change Log

Date	Summary of Changes / Additions
04/05/2020	Chapter 2 has been modified. Starting the video meeting has been changed to prompt the user with recipients by name and email or cell phone. Recipients will be notified automatically by the system.
04/05/2020	Chapter 6 has been modified. Configuring the App to participate on a mobile phone has been changed. The App no longer requires to be configured. Clicking the link provided, will bring the user directly into the video.

Preface. Mindshare TeleShare™ Overview

This preface provides an overview of the Mindshare TeleShare™ features which are accessible at the Case Workspace. The following topics will be covered:

- Mindshare TelShare™
- Mindshare Case Workspace
- Video Conference with Remote parties
- Photograph Upload to FSFN
- Case Note Upload to FSFN
- Secure Document Sharing

Mindshare TeleShare™

This is a new feature within TACF™. TACF™ is the Mindshare Portal where a user logs in from their desktop or laptop to access their dashboards as well as other features.

NOTE: this is not the mindshare Mobile App. The Mindshare Mobile App is seperate and not part of the TeleShare™ features. TeleShare™ is used from the Desktop or Laptop and is not a Mobile App.

The Case Workspace is a dashboard that presents the following:

1. Case details
2. Children in the case
3. Other case participants
4. Secure documents
5. Features for creating and submitting a case note
6. Selecting and uploading a photograph
7. Creating and Starting a video Meeting

The Video Conference is a feature not to unlike zoom, skype other video conferencing software. Mindshare's video conference server is a secure feature hosted in its SSAE16 certified data center. Further, it is accessible within the context of a case or child and a seamless feature that is embedded within Mindshare. Audit trail is maintained for all interactions with the Case Workspace including users uploading photographs, case notes or initiating video meetings.

A photograph can be taken from a frame while a video conference is taking place. One or more photographs can be taken during a single video conference. The photographs can the be uploaded directly into FSFN from Mindshare. NOTE: this is no different than submitting a photograph to FSFN from the Mindshare Mobile App.

A case note can be created by launching the case note form. The form can be filled out and directly submitted to FSFN. Note: this is no different than submitting a case note to FSFN from the Mindshare Mobile App.

Secure Document sharing is also available at the Case Workspace and allows staff or a case manager to upload a document and assign it to a remote resource. In order for the remote resource to access the document, the remote user must have a user id and password to log into Mindshare. Once they log in, they are only presented with a document list for which they were assigned. They can select a document to view. They can also upload documents should they have items to share with the case manager or CBC staff. Keep in mind that a video conference can also be conducted with these remote, external resources.

Chapter 1. LOGGING IN TO MINDSHARE

This chapter provides an overview of how to log into Mindshare and access the new Case Workspace.

- Log in screen
- Technical Support Email
- Helpdesk Phone Number
- Case manager MyDash
- Chile Face Sheet
- Case Workspace

Login Screen

The login screen is the first page visible when clicking on the Mindshare Application link or the URL as provided by your agency. Simply enter your userid and password. If you do not know your user id or password please contact support at Mindshare or within your own agency.

Figure 1, Mindshare Login Screen

Technical Support Email

To Email Technical Support either click the link on the login page (or at the Mindshare main menu). This will pop an email box with the Mindshare email address already filled in. Enter your question or issue and click send. Or, email to the following:

support@mindshare-technology.com

Help Desk Phone Number

The call the Help Desk, please use the following phone number and extension:

813-949-3293 x222

This will connect you with a member of the help desk who can answer any questions that you may have included userid and password issues, navigating the Mindshare system or access the new TeleShare™ features.

Case Manager MyDash

The Case Manager MyDash is the first page that case managers should see when they log into the Mindshare system. Is presents the caseload of the user who has logged in. While there are many features on the MyDash, there are only two features being covered in this user guide.

1. Clicking on the Case ID
2. P.E which is Potential Exposure

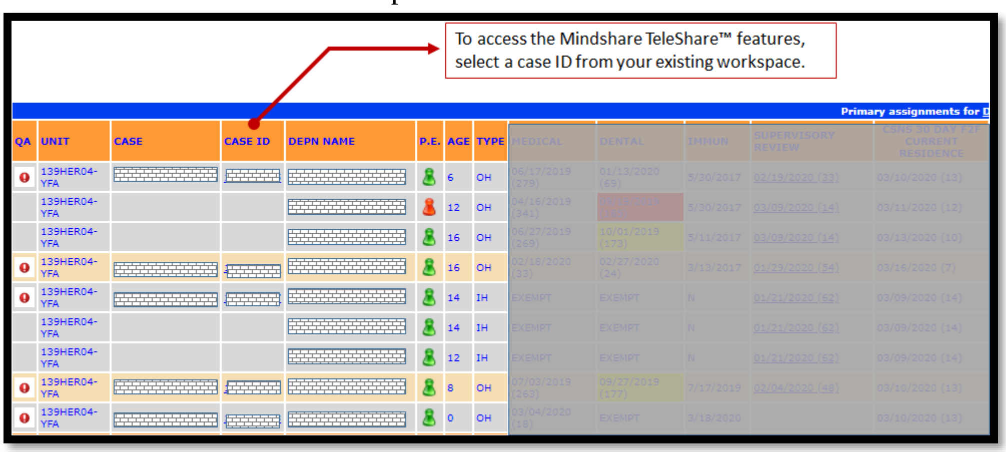


Figure 2, Case Manager MyDash

Clicking on the case ID will present the user with the Case Workspace (see below).

Clicking on the “child” icon in the P.E. column indicates that the child has been exposed or potentially exposed to COVID-19. Once clicked, the icon will turn red. If clicked again, the icon will revert back to green.

NOTE: some environments have two buttons for COVID-19. For example, both a PE button as well as a CC whereas the CC button indicates Confirmed COVID-19. In this configuration the PE would turn yellow (not green) and the CC would turn red.

Child Face Sheet

This user guide does not cover the features of the Child Face Sheet and is only mentioned here because the Case Work Space is accessible by clicking on the Case Work Space button just under the case notes. See Below.

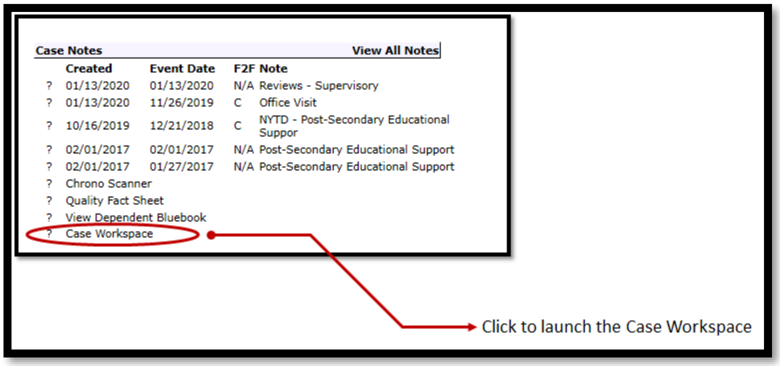


Figure 3, Child Face Sheet

Case Workspace

The Case Work Space has many uses, however, it is also the access point for the new Mindshare TeleShare™ features. Notice on the top left of the screen, there are three new features, Visit Case Note, Photo Upload and Video Meeting. On the bottom left of the screen, you can also see the Secure Document sharing feature.

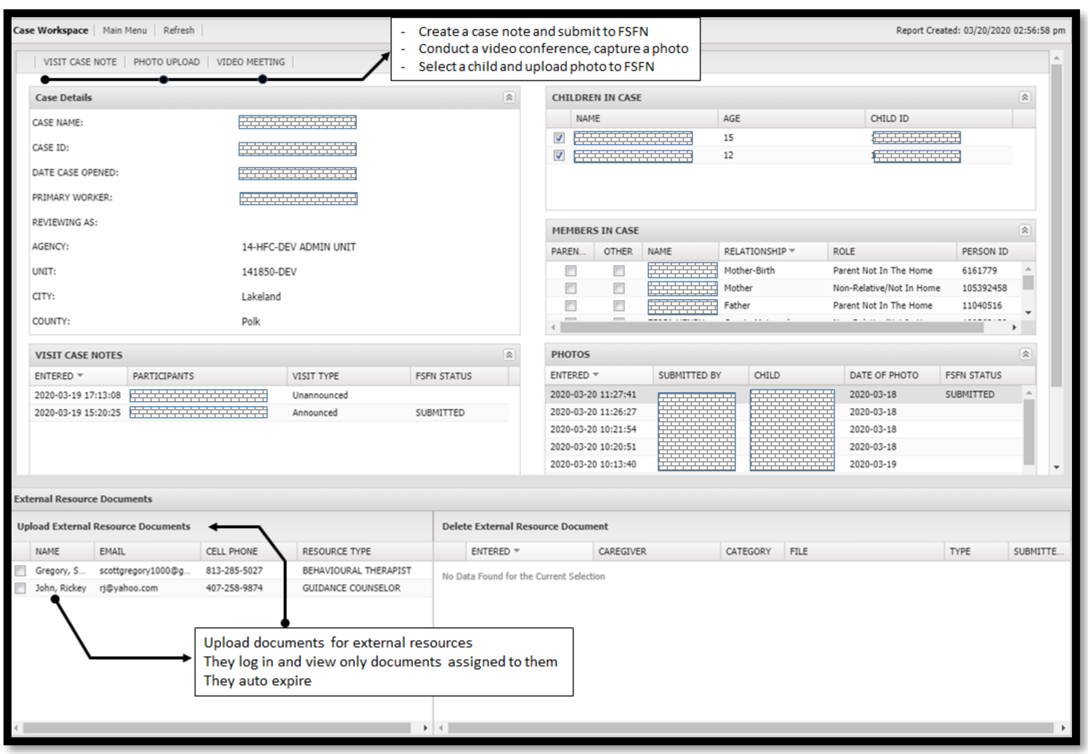


Figure 4, Case Workspace

Chapter 2. Video Meeting

This chapter provides an overview of how to use the video meeting from within Mindshare (and accessible at the Case Workspace). This chapter covers the following specifics:

- Making sure you have the correct environment (Chrome)
- Starting the meeting
- Sharing the link to the video conference
- Grabbing a photograph from the video conference

Video Meeting Requirements

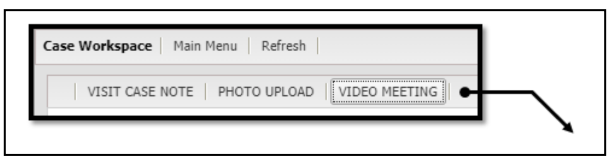
In order to use the video conference feature, the user MUST use a Chrome browser. If you do not have Chrome installed on your desktop or Laptop, please consult your IT group or download chrome at the URL below. NOTE: your caregiver, foster parent or remote party will also need to use Chrome to participate in a video meeting.

Download and install Chrome:
https://www.google.com/chrome/

For the CBC staff or Case Manager who is hosting the video conference, and desires to take a photo grab of the video conference, the Chrome plugin is one option and can be installed by clicking the following link. NOTE: this is not required unless a photo grab is required.

https://chrome.google.com/webstore/detail/nimbus-screenshot-screen/bpconcjcammlapcogcnnelfmaeghhagj?hl=en-US

Starting the Meeting



In order to use the video conference feature, the user MUST use a Chrome browser. From the Case Workspace (as shown to the left), simply click the VIDEO MEETING button and you will be prompted to enter the participants in which you desire to video meet with. You must enter their name and either their email or mobile phone.

NOTE: if the remote party will participate via computer or desktop, it is recommended to include only their email. If they will participate via mobile phone or tablet, it is recommended to include only their mobile number. When entering their mobile number, they will receive a text message with the link to the meeting. When entering only their email, they will receive a link via email. See below.

Figure 5, Inviting Recipients

Once you select “submit”, the system will notify your participants as follows:

- If you filled in just the email for a participant, your email will pop up. Either hit send, or enter a custom message and then hit send.
- If you filled in a mobile number, a text message will be submitted to their phone number.

Once complete, your video session will start. IF IT DOES NOT START, check to see if any pop-up’s were blocked. See below:

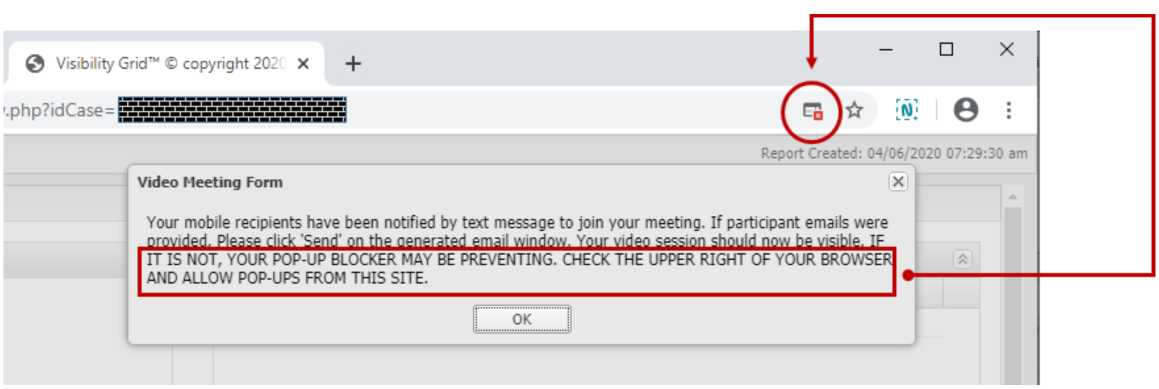
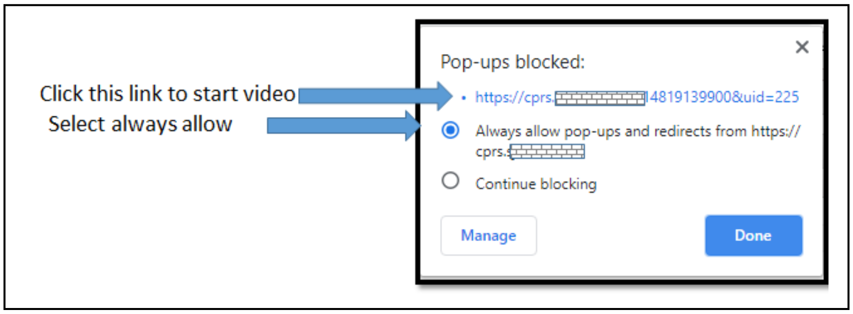


Figure 6, Check if pop-up's were blocked

If you see the icon in your browser as circled above, please allow pop-up’s by clicking the icon.

If your video window does not appear; either as a new window or a new tab, click the icon and the select “Always allow pop-ups from this site, then select the link to start the video. Your video session will begin as follows.



Once the video session launches, it will prompt the user to permit access to the microphone and camera. While the microphone is optional if a telephone will be used, the camera is mandatory. If you desire to use your computer microphone, access to the microphone must also be permitted. At this point the session is waiting for a remote party to join. Please take note of the URL (or video link) in the upper left-hand side of your Chrome browser.

Waiting for your party (or parties) to join

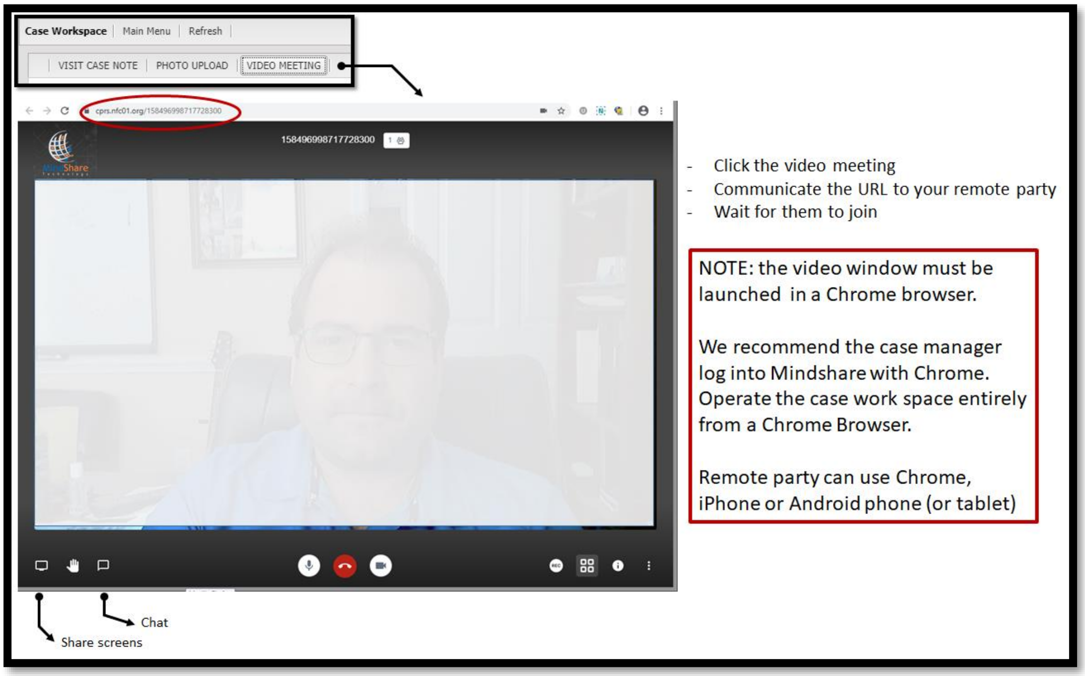
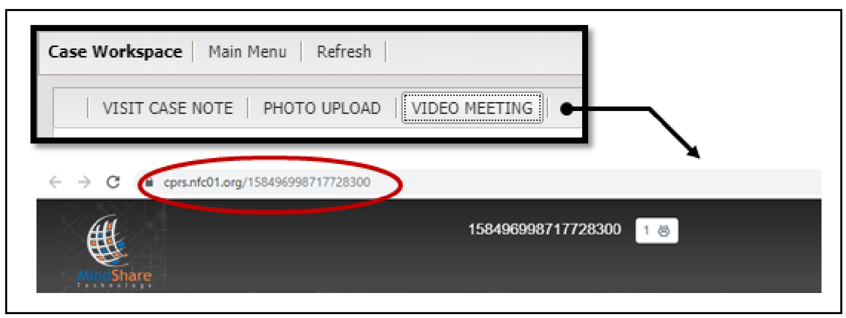
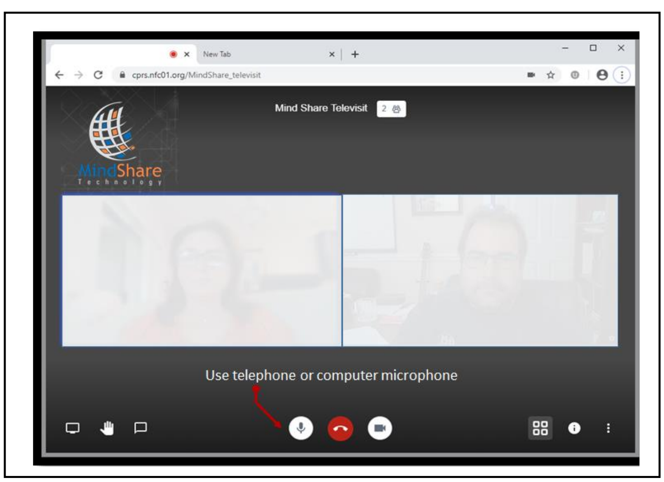


Figure 7, Starting the Video Meeting, waiting for parties to join

The above figure shows the video session prior to a remote party joining. At this point you can test your microphone and video camera settings (through the settings icon). **If you party did not receive the email or text message** you can email it, text it or convey it verbally if you are speaking with them via telephone or cell phone. The remote party will take the video link (or URL) and paste or type it into their Chrome browser. Once they click the enter key or click the link, the video meeting will start.





At this point both parties can communicate either by telephone or by using the computer microphone, can see each other and can conduct a face to face meeting.

NOTE: if additional parties are desired, the video link (or URL) can be shared to the other parties. Using their Chrome browser, the remote parties can join the video conference.

Grabbing A Photograph

During the video conference and at any time, as many times as required, we recommend you announce to your remote party that you are preparing to take a photograph. Click the Nimbus icon on the top right of the Chrome browser as shown below.

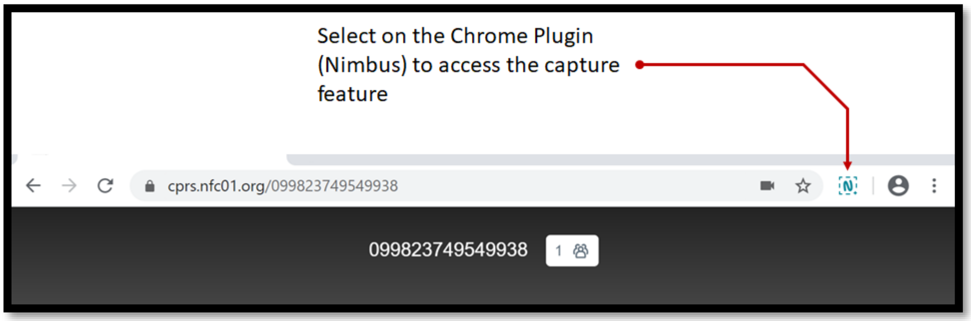


Figure 8, Activate Capture Feature

Once the Nimbus icon is clicked a menu will appear. We recommend that the "capture fragment" option is used. This will allow you to hover over your remote party's video box. Once positioned, click your mouse and you will see a set of options below the frame you chose.

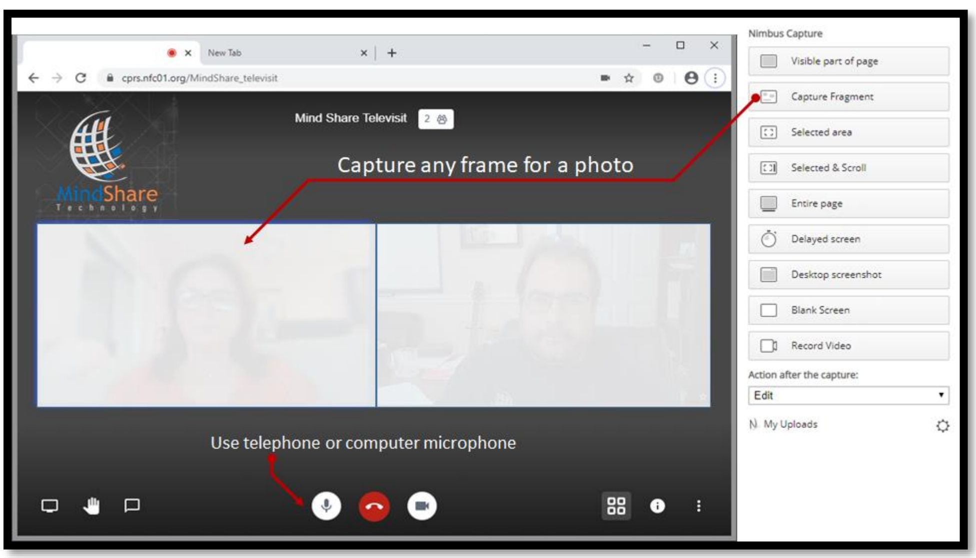
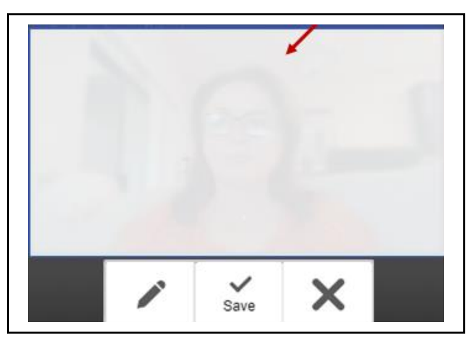


Figure 9, Grab Photo from Video

As shown to the right, the menu will allow you to cancel, draw on the picture or save. Saving the image will allow you to use it later, for example, upload to FSFN.



Chapter 3. Uploading a Photograph

This chapter provides an overview of how to use the photograph or photographs that were taking during a video meeting. This option is accessible within Mindshare (this feature is accessible at the Case Workspace). This chapter covers the following specifics:

- Selecting a single child
- Uploading the photograph to FSFN

Selecting a single Child

In order upload a photograph, you MUST select one and only one child. If you have no children selected or you have more than one, you will be prompted with an error. Once a single child is selected, you can select the "photo upload" in order to submit the photograph to FSFN.

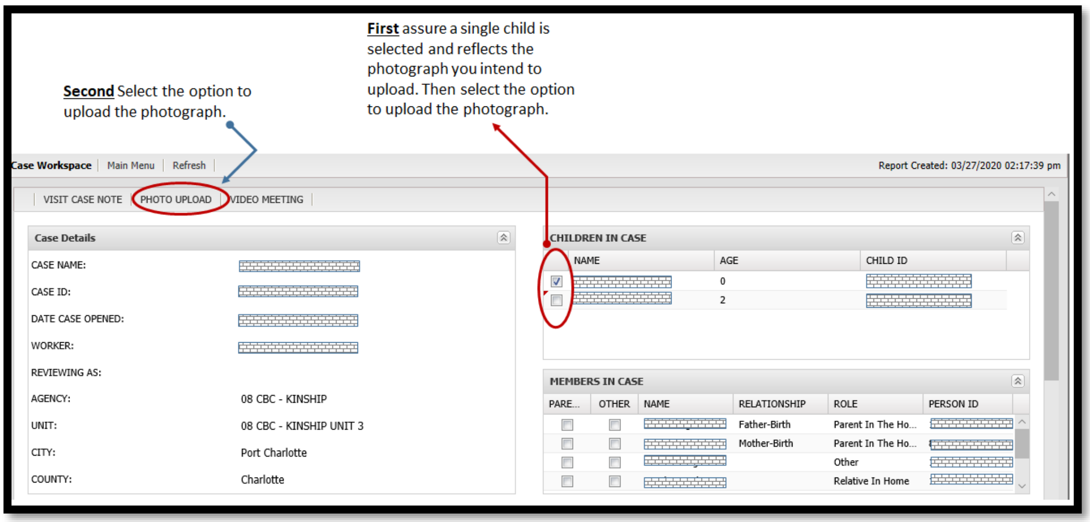
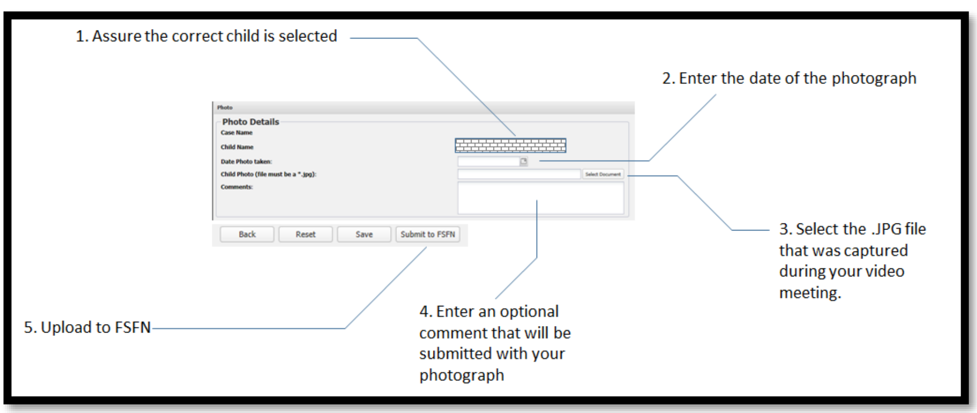


Figure 10, Uploading A photograph

Submit to FSFN

Once the Photo Upload feature has been selected, you will be prompted with a dialog box as shown below.



Assure the correct child is selected, enter the date, **select the .JPG file that is associated with the child,** enter an optional narrative and select the Submit to FSFN option.

Chapter 4. Creating a Case Note

This chapter provides an overview of how to create and upload a FSFN case note from within Mindshare (the feature is accessible at the Case Workspace). This chapter covers the following specifics:

- Selecting participants
- Creating the Case Note
- Saving or Submitting to FSFN

Selecting Participants

In order to create a case note, the user must first select one or more children; and/or one or more members who participated in your meeting. These participants will be included in your case note when it is submitted to FSFN.

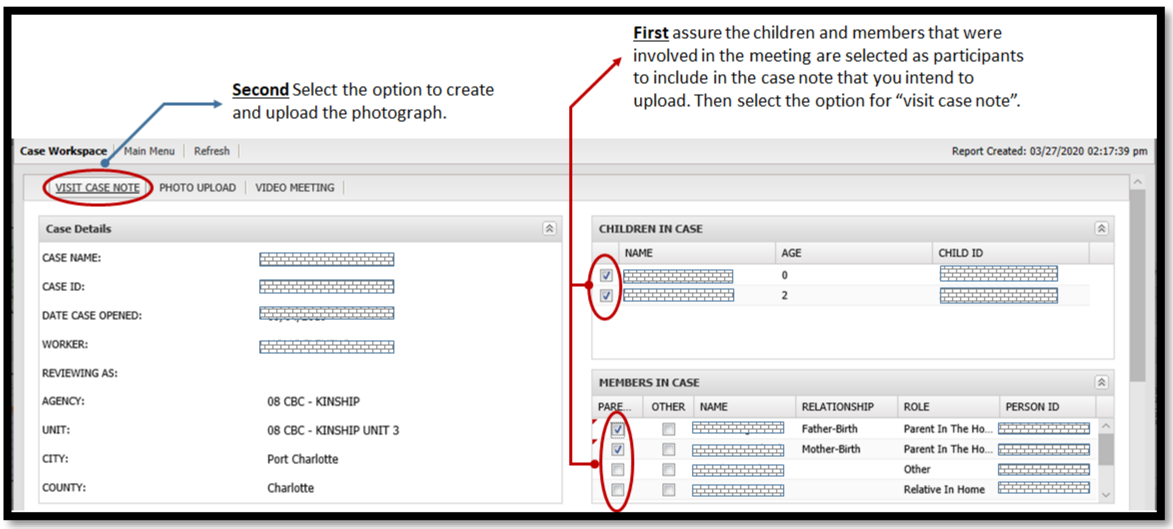


Figure 11, Selecting Participants

Once the participants are selected. Choose the "Visit Case Note". You will be prompted with the form as shown below.

Create Case Note

Once the participants are selected and you click on the button “Visit Case Note”, you will be prompted with the following form. Fill in all required fields. If you attempt to submit the note to without filling in all required fields, the required fields will be highlighted in red.

Note: that the questions presented on your form may vary from Agency to Agency. For example, during the COVID-19 outbreak, there are 3 mandatory questions that must be answered regarding the participants selected.

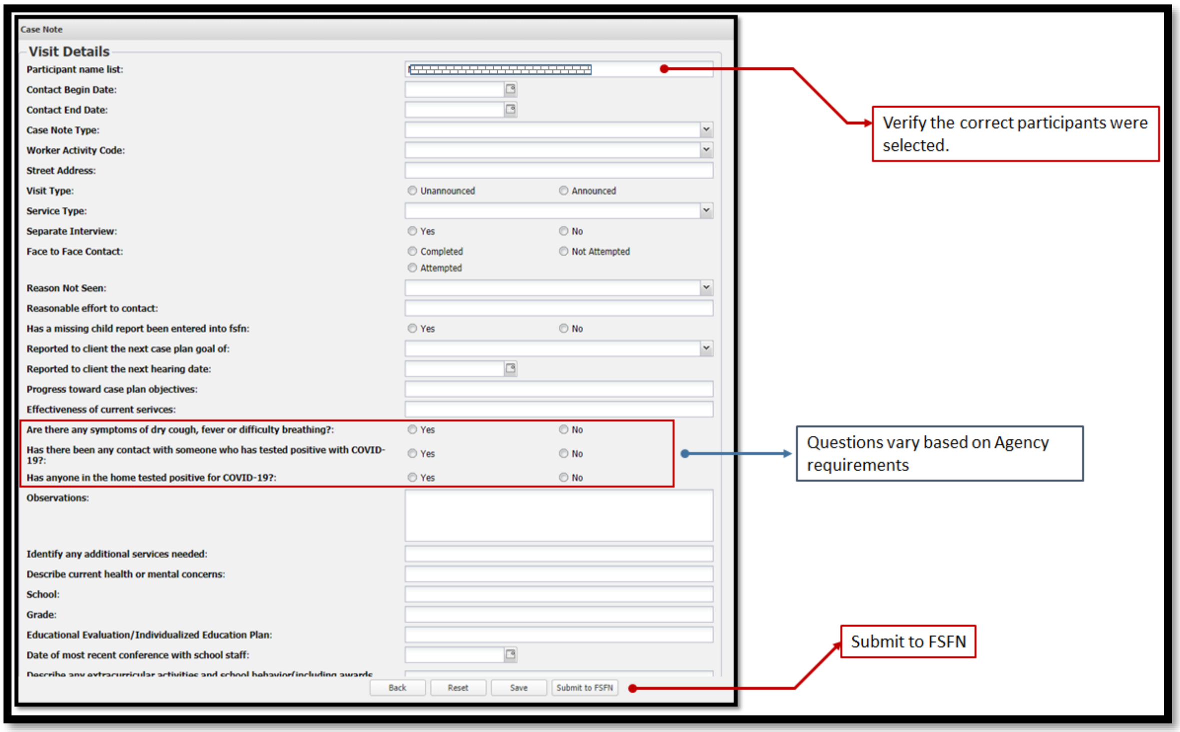


Figure 12, Create Case Note

Submit/Save the Case Note

Once the case note is filled in, click the button, “Submit to FSFN”. NOTE: if you begin to complete the form but are not yet finished and not ready to submit the form, you can click the “Save” button. This will save the note on the Case Workspace. You can go back to the note at any time, select it, complete the note as desired, and then Submit the note when ready. Only when you received the message that the note was successfully submitted, is the note entered and available from FSFN.

Chapter 5. Document Sharing

This chapter provides an overview of how to upload a document, assign it to an external resource and how to delete the document. This feature is designed to maximize collaboration efforts between staff and case managers and external resources remotely. Keep in mind that this feature can be used in conjunction with the video meeting to further enhance the experience of collaborating with remote resources. This chapter will cover the following topics:

- Selecting an external resource
- Uploading a document
- Deleting a document

Selecting an External Resource for Document Sharing

On the case workspace, below the case notes and photographs, there is a section for "External Resource Documents". If there are no external resources listed, this would indicate that there are no external resources available to share documents with. If an external resource is not appearing but needs to be available for document sharing, contact your Agency system administrator. The system administrator MUST create a Mindshare user account for any and all external resources in order to grant them access to documents that are uploaded.

When the desired external resource appears, you can select the resource (or resources) by selecting the check box next to the respective name. Once the resource is selected, click the "Upload External Resource Document".

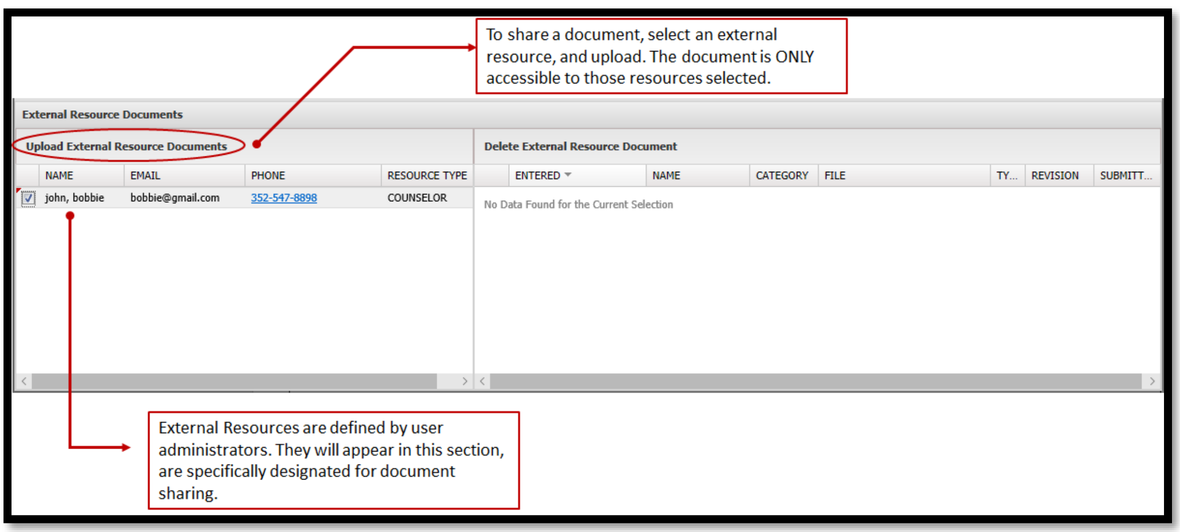
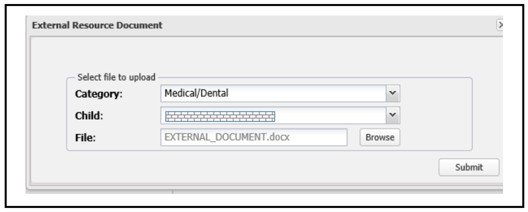


Figure 13, Selecting an External Resource for Document Sharing

Uploading a Document

Once the Upload button is selected, choose a category, the respective child and the document you intend to share. Once all selections are made, click the "Submit" button and the document will be uploaded to the Mindshare Case Workspace as shown below. This also indicates that there are documents available for the external resource when the login.



NOTE: the external resource will be presented only with a listing of documents that have been made available to them. See the figure below which represents what the external resource would see.

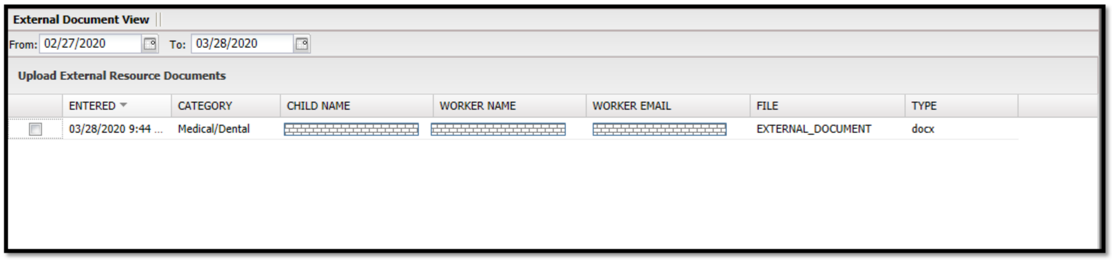


Figure 14, View from External Resource

NOTE: the external resource can also select a document in order to upload additional documents or a response to a document. For example, they may upload a signed document to the Mindshare Case Workspace for use by the Case Manager or other Staff who need to view or manage such documents.

Deleting a Document

When documents have been uploaded into the case workspace, by staff, a case manager or the external resource, they appear in the pane to the right of the external resource. Documents can be selected at any time by clicking the checkbox to the left of the document. Once selected, you can click the “Delete External Resource Document” button to delete the document making it unavailable for future use and/or accessible to any external resource.

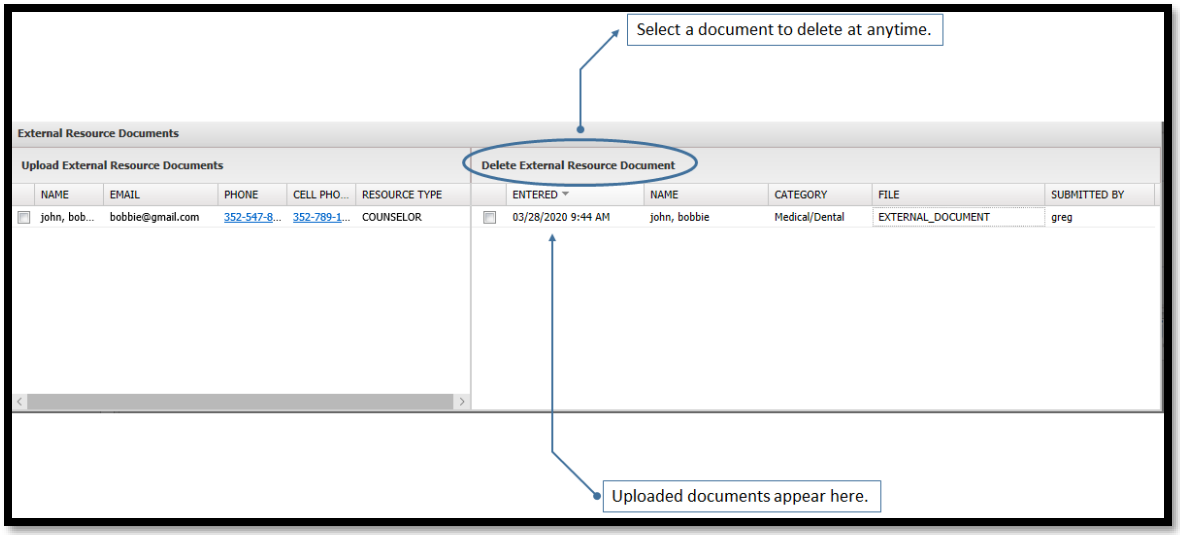


Figure 15, Deleting a Document

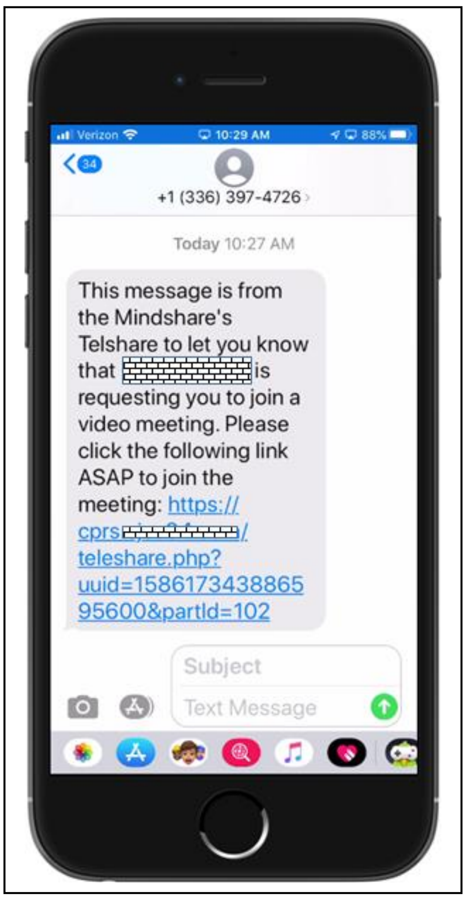
Chapter 6. Configuring the App to Participate

This chapter provides an overview of how to configure the App to be used by one or more remote parties. Any number of remote parties can participate using either their Chrome browser, or smart phone or tablet. This chapter will cover the following topics:

- Configuring the App
- Joining a Video Meeting from the App

Configuring the App

If the remote party is going to use the App, they must download and configure Jitsi Meet. For iPhones or iOS tables install from the App Store. For Android devices, install google play store.



Once installed the user ONLY need to click the link provided. The figure to the left shos an example of a text message. All that is required if for the user to tap the link provided.

An email link can also be provided. If the user reads the email on their phone or tablet, they can click the link from the email as well.

Once they tap the link, they will be prompted to either download the App or proceed to the App. See below.

Joining a Video Meeting from the App

Once the link is tapped by the user, the user will be prompted to download the app or continue to the app. See below.

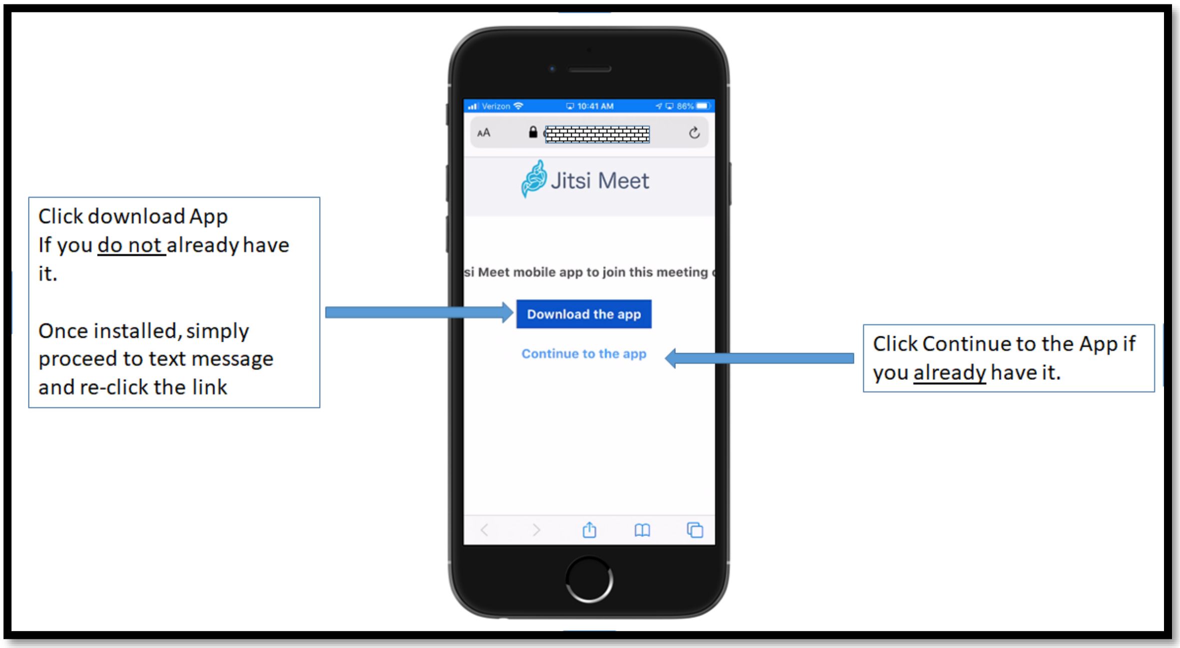


Figure 16, Configuring the App to participate in a Video Meeting

If the user must first download the App because they have not already done so, they can click the button and the download will occur. After the download, simply use the link provided, click the link, than tap "continue to the app" and the video meeting will begin.

[End of Document]