Iowa FaDSS Document Management Guide

General Information

All documentation accrued for all families will be maintained in the Iowa FaDSS web-based case management system.

Allowable File Types and Size

The following file types are allowable within the system:

- .docx
- .doc
- .bmp
- .gif
- .jpeg
- .jpg
- .odp
- .odt
- .png
- .pdf

Users should make every effort to minimize the number of scanned documents uploaded into the system. Files larger than 10MB cannot be uploaded.

Document Types

All documents uploaded into Iowa FaDSS will be assigned a document type label selected from a drop-down menu. The document type is associated with a category. When a document is uploaded, it will appear in the appropriate category or subtab based on the selected document type.

Document Templates and Fillable Forms

Document templates can be accessed in the Resource tab in Iowa FaDSS by selecting Document Templates from the dropdown menu.

Home   Family Records ▾   Grantee ▾   Reports ▾   <mark>Resource ▾</mark>   Membership

Document templates can also be accessed in the Documents tab within each family record

List of Documents

<mark>Download Template ▾</mark>   Upload New File

| Intake & Eligibility(0) | Family Consent(0) | Assessments(0) | PROMISE JOBS(0) | DHS(0) | Correspondence(0) | Other(0) |

Date/Time Uploaded	Document Type	Description	First Name	Last Name

Upload New File

The document templates are fillable forms that can be saved to a user's device and uploaded to the Documents tab in a family record. Not all templates are required for use and requirements vary by grantee. For example, the Specialist Checklist is an optional fillable template. However, if utilized, the user must upload the saved fillable template rather than scanning a document into the system. Please refer to the list in Section 2 of this document for more information.

Categorizing Documents

Within the Documents tab of Iowa FaDSS, there are seven sub tabs or categories, which include:

- Intake & Eligibility
- Family Consent
- Assessments
- PROMISE JOBS
- DHS
- Correspondence
- Other

When uploading documents, users will select the document type from the drop down menu. The uploaded document will appear in the subtab organized by category. Users may enter a description for the document. For example, a user could include the date the FIA for a family was received as shown in the example below. Using descriptions may aid in the efficiency of file reviews.

Upload Document   ✕

File	Browse...
	Allowed Types: .docx,.doc,.bmp,.gif,.jpeg,.jpg,.odp,.odt,.png,.pdf
	Note: File upload more than 10MB not allowed
Document Type	Family Investment Agreement
Family Member	
Description	FIA - Received 6/12/25

Discard Changes   Save Changes

The following list shows the various documentation maintained in family records according to Document Type and the categories for each.

Document Type	Category	Notes
Initial Eligibility Form	Intake & Eligibility	Required for all families. Uploaded upon completion
Intake Form	Intake & Eligibility	Optional. If used, upload upon completion. Use to gather info for Iowa FaDSS if not entering directly into the Iowa FaDSS website
Specialist Checklist	Intake & Eligibility	Optional. If used, upload fillable form
Other	Intake & Eligibility	Use for other agency-specific Intake & Eligibility documents
Agency Media Release	Family Consent	Optional. If used, upload electronically signed PDF
Internal Agency Release	Family Consent	Optional. If used, upload electronically signed PDF

Participation Agreement	Family Consent	Required for all families. Upload electronically signed PDF
Release of Information	Family Consent	Optional. If used, upload electronically signed PDF
Other	Family Consent	Use for other optional agency-specific consent forms
Stepping Stones to Family Success (completed at minimum every 6 months)	Assessments	Required for all families. Scan and upload or upload a picture of the completed document.
AC-OK Screening	Assessments	If completed, upload the fillable form.
ASQ	Assessments	If completed, upload only the score sheet.
ASQ-SE	Assessments	If completed, upload only the score sheet.
Budget Worksheet	Assessments	If completed, save as PDF before uploading
Ecomap	Assessments	If completed, upload a picture or scanned document.
Financial Literacy	Assessments	If completed, documentation in the contact tab will suffice and the completed tool is not required to be uploaded. If uploaded, a picture or scanned document is allowable.
Genogram	Assessments	If completed, upload a picture or scanned document.
FaDSS Getting to Know You	Assessments	If completed, upload fillable form
Parenting	Assessments	If completed, documentation in the contact tab will suffice and

		the completed tool is not required to be uploaded. If uploaded, a picture, PDF or scanned document is allowable.
Relationship Assessment Tool	Assessments	If completed, documentation in the contact tab will suffice and the completed tool is not required to be uploaded. If uploaded, a picture, PDF or scanned document is allowable.
Timeline	Assessments	If completed, upload a picture, PDF or scanned document.
Other	Assessments	Use for other agency-specific assessments
Family Investment Agreement	PROMISE JOBS	Required for all PJ families. Upload saved document in PDF format
PJ Clear Written Reminder	PROMISE JOBS	If received, upload saved document in PDF format
PJ Job Search Log	PROMISE JOBS	If received, upload saved document in PDF format
PJ LBP Notice	PROMISE JOBS	If received, upload saved document in PDF format
PJ Notice of Appointment	PROMISE JOBS	If received, documentation in the contact tab will suffice and document not required to be uploaded. If uploaded, save document in PDF format
PJ Referral Form	PROMISE JOBS	If received, upload saved document in PDF format

PJ Time & Attendance	PROMISE JOBS	If received, upload saved document in PDF format
Report of Incapacity	PROMISE JOBS	If received, upload saved document in PDF format
Other	PROMISE JOBS	Use for other PJ-related documentation.
Appeal Information	DHS	Optional. Upload saved document in PDF format
Iowa HHS Notice of Decision	DHS	Optional. Upload saved document in PDF format
Other	DHS	Optional. Use for other Iowa HHS-related documentation.
Email Correspondence	Correspondence	Optional. All correspondence must be documented in the Contacts tab. Use this tab at your discretion for attachments or to save emails in PDF format.
Mail Correspondence	Correspondence	Required to upload any form letters mailed to families. Upload saved document in PDF format.
Other	Correspondence	Use for other correspondence.
Other	Other	Use for other documentation

Follow these simple steps to save your email as a PDF.

1. Find your email. Open the email in your inbox that you intend to save as a PDF document.
2. Start the download. Click the Print option.
3. Select the PDF option. When the printer menu opens, select Save as PDF from the destination drop-down menu.

Section 3: Uploading Documents

Within each family record in Iowa FaDSS, there is a Documents tab. Users will navigate to this tab to upload documentation from their device into Iowa FaDSS using the Upload New File button.

List of Documents						
Download Template ▾						Upload New File
Intake & Eligibility(0)	Family Consent(0)	Assessments(0)	PROMISE JOBS(0)	DHS(0)	Correspondence(0)	Other(0)
Date/Time Uploaded		Document Type	Description	First Name		Last Name
						Upload New File

Upload documents from a device by following these steps;

1. Select Upload New File
2. Select Browse and navigate to the document to be uploaded from your device then select Open
3. Select the Document Type from the dropdown menu
4. Select the Family Member for whom the document is related from the drop-down menu (optional)
5. Enter a brief description of the document (optional)
6. Select Save Changes

The document will appear in the sub tab according to the category associated with the Document Type. Next to each subtab or category is a number in parenthesis indicating the total number of documents uploaded in that category or subtab. Documents are time stamped and listed in chronological order in each subtab or category.

Actions

Download: by selecting Download from the drop-down Action menu next to a document, the uploaded document will download to the user's device.

View: by selecting View from the drop-down Action menu next to a document, the uploaded document will appear in a new tab. User device settings may prohibit this feature from functioning as intended and documents may automatically download to the user's device. Users are encouraged to contact their IT departments for assistance adjusting settings.

Delete: by selecting Delete from the drop-down Action menu next to a document, the user can delete a document. A prompt will appear asking if the user is sure they would like to delete the document.