



**Office of Children  
and Family Services**

**Changes to the CONNECTIONS  
Family Services Stage (FSS) – Phase 3  
Progress Notes**

**Quick Start Guide**

# Changes to the CONNECTIONS Family Services Stage (FSS) - Phase 3 Progress Notes

## Introduction

This guide is intended for workers who are familiar with the CONNECTIONS Family Services Stage (FSS) and whose responsibilities include preparing progress notes in CONNECTIONS. It summarizes changes to the *Progress Notes* window as part of the modernization of the FSS. Please note that any visible identifying data in this document is fictitious and used for training purposes only.

## The Family Services Stage Modernization

Modernization of the FSS is occurring in several phases. The implementation of Phase 1 in May 2015 replaced the tabbed *Family Services Stage* window with separate windows accessed via the NAVIGATION PANE. Phase 1 also included replacement of the **Stage Composition** tab with the *Person List* window, modernization of the Bridges to Health (B2H) windows and various supporting windows and introduced the new *FSS Stage Summary*.

In June, 2015, Phase 2 of the FSS Modernization was implemented, which included the modernization of the *Education* window within the FSS, as well as the **Individualized Education Plan Detail** (IEP) link.

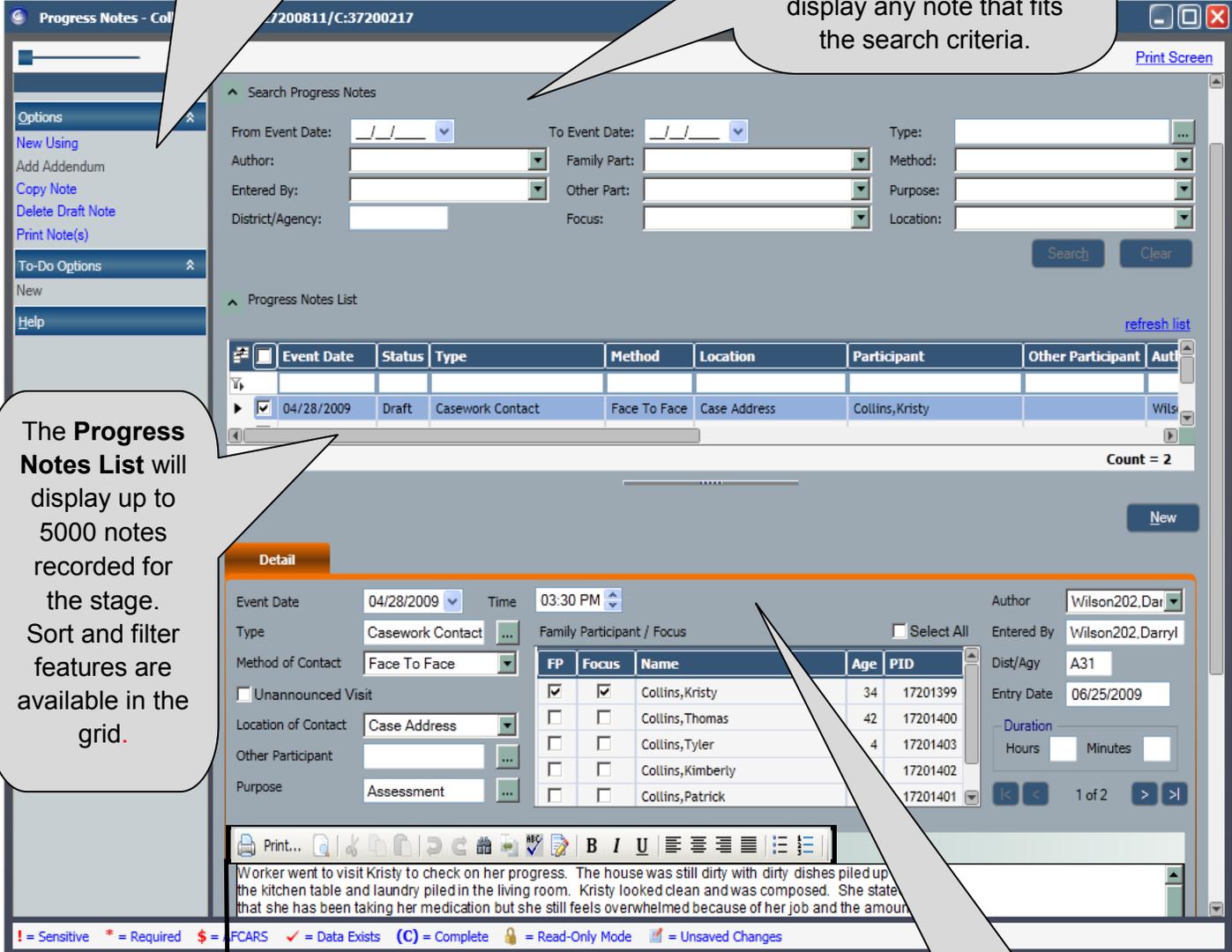
Upon implementation of Phase 3, FSS stages will contain a *Progress Notes* window that is very similar to that in other stages in CONNECTIONS, such as the CPS Investigation (INV) stage. For FSS stages on your workload, you will use the **Progress Notes** link in the NAVIGATION PANE of the *Workload* window to access the Progress Notes component. Staff using the Progress Notes Specialty path will continue to access the *Progress Notes* window as they do now.

# The Progress Notes Window

The Search and List grids, as well as the Detail section will be contained on one window. Highlighted below are the main features of the window.

Links will provide access to progress note actions such as copying, deleting, and printing notes, as well as adding addenda.

The **Search Progress Notes** section will allow you to search for notes. Upon searching, the Progress Notes list will display any note that fits the search criteria.



The **Progress Notes List** will display up to 5000 notes recorded for the stage. Sort and filter features are available in the grid.

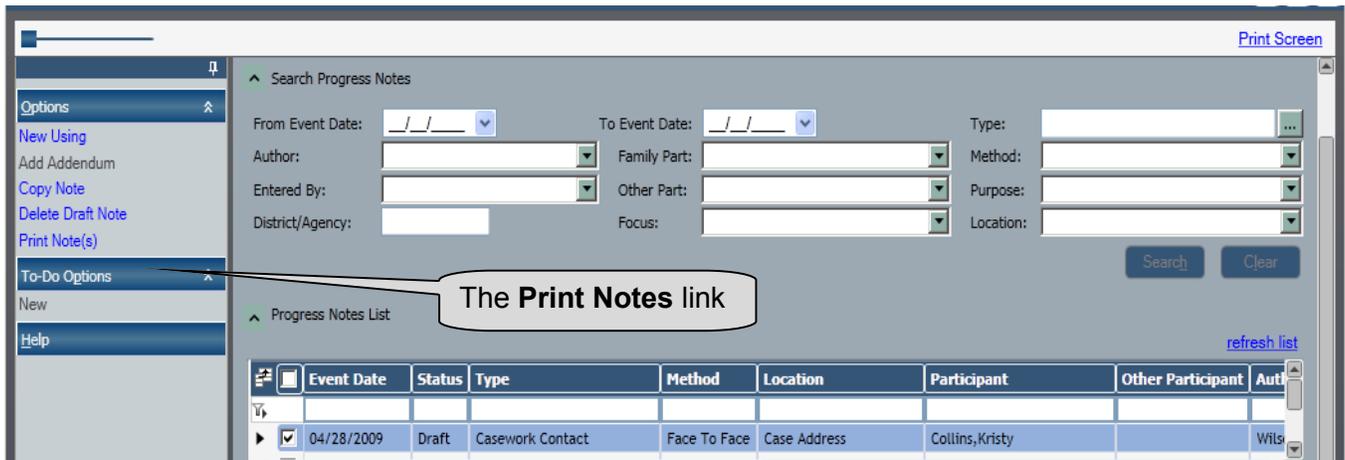
The **Detail** tab will display upon selecting a note from the grid or clicking the **New** button. On this tab you will create, view, and modify notes.



Upon implementation, a new editing tool will replace the existing tool found in *all modernized windows containing larger narratives*. The new toolbar will include **Undo** and **Redo** options.

## Printing Progress Notes:

When the modernized *Progress Notes* window is implemented, clicking on the **Print Note(s)** link will create one or more printable reports, each containing up to 250 progress notes.



Printed Progress Notes, like other reports, will be accessed through the **Reports** tab.



When selecting a large number of progress notes, **you may need to wait for the reports to load. It may be necessary to click on the refresh list link in the upper right corner of the Reports window in order for the status to change from Pend (pending) to Done.** As now, **you can filter or sort progress notes in the Progress Notes window to display only those notes you wish to print.**

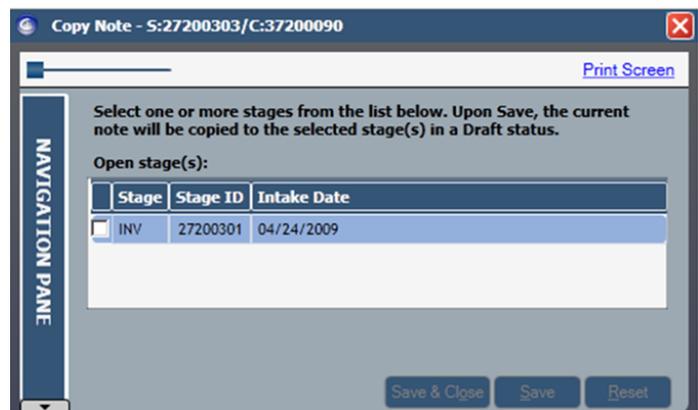


## Copying Progress Notes between Stages

The Copy Note feature will continue to be available for you to copy progress notes between stages. **Stages must be in the same case.** The *Copy Note* window will be modernized to look and function similarly to other modernized windows.

### Copying a Progress Note

- 1 On the *Progress Notes* window, select the note you wish to copy.
- 2 Click the **Copy Note** link in the **NAVIGATION PANE**.  
*The Copy Note window displays with a list of available stages.*
- 3 Select the checkbox of the stage to which you wish to copy the note.
- 4 Click the **Save & Close** or **Save** button.  
*The note is copied to the selected*



Copying is Permitted		Copying is NOT Permitted	
From:	To:	From:	To:
INV	INV	INV	FSS
INV	FAR	FAR	FSS
FAR	FAR	FAR	INV
FSS	INV		
FSS	FAR		

# Available Resources

## OCFS Internet Site (<http://ocfs.ny.gov/main/>)

Many resources are available on the **CONNECTIONS** page of the OCFS internet site (<http://ocfs.ny.gov/connect/>). Clicking on the available links, such as **Implementation**, **Step-by-Step Guides/Job Aids/Tips**, you will find resources such as these:

- Quick Start Guides
- Job Aids
- Tip Sheets

These documents and others will provide you with the most up-to-date information on CONNECTIONS.

## OCFS Intranet Site (<http://ocfs.state.nyenet/>)

Many of the same resources noted above are available for you on the **CONNECTIONS** page of the OCFS intranet site (<http://ocfs.state.nyenet/connect/>).

## CONNECTIONS Regional Implementation Staff

If you cannot find the answer to your question(s) within the documentation mentioned above, you can contact one of the many statewide CONNECTIONS Regional Implementation Staff members. The current list of members is always available on the OCFS CONNECTIONS Internet and intranet sites:

On the **Internet**:

<http://www.ocfs.state.ny.us/connect/contact.asp>

On the **intranet**:

<http://ocfs.state.nyenet/connect/contact.asp>

## Application Help Mailbox

You can directly contact the NYS CONNECTIONS User Support/Triage staff for help with complex application issues. Questions, problems, and concerns can be emailed to:

**[ocfs.sm.conn\\_app@ocfs.state.ny.us](mailto:ocfs.sm.conn_app@ocfs.state.ny.us)**

## NYS ITS Enterprise Service Desk

The New York State Office for Information Technology Services (ITS) Enterprise Service Desk is available to answer basic questions related to your equipment, or to solve problems you are having with CONNECTIONS. If they cannot solve your problem, they will record your information and forward it to others who can. The Service Desk is staffed 24 hours a day, seven days a week. The telephone number and email address are:

**Phone: 800-697-1323**

**Email: [FixIT@its.ny.gov](mailto:FixIT@its.ny.gov)**