



CONNECTIONS Upstate Build 18
Case Management Quick
Reference



This document was designed as a navigational tool to assist users with common CONNECTIONS functionality.

For complete step-by-step documentation, refer to the CONNECTIONS Case Management Step-by-Step Guide located on the 'Step-by-Step/Job Aides/Tips' page of the CONNECTIONS Intranet site.

If you have additional questions, contact your Regional Implementation Staff. A listing of these staff is located on the 'Contact Us' page of the CONNECTIONS Intranet site.

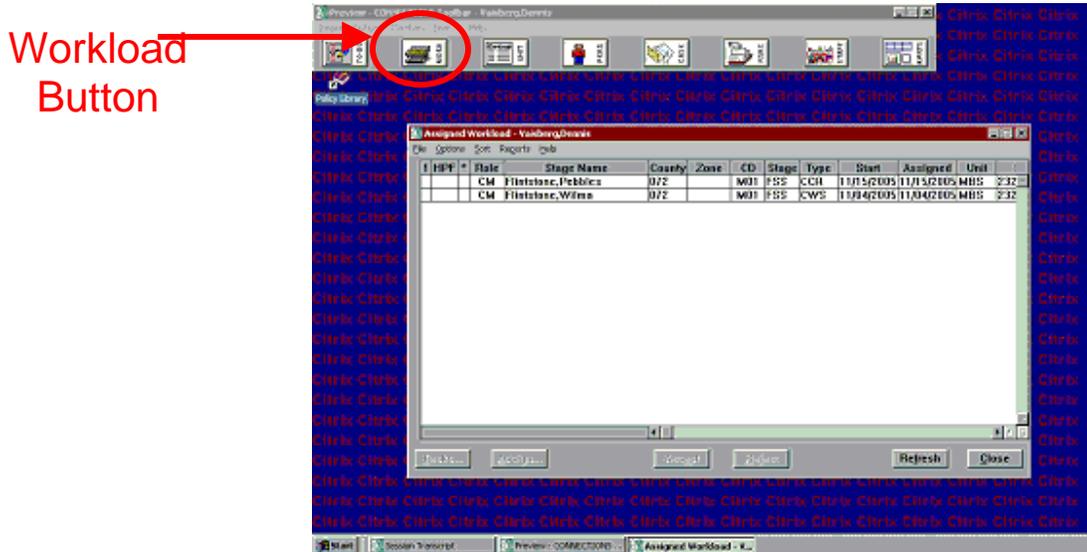
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Assigned Workload vs. Staff To-Do List

Use the **Work** button to open your Assigned Workload. From your Assigned Workload, you can

1. View your open case list.
2. Reassign stages.
3. Complete and document work on open stages (i.e. perform demographic changes; complete FASPs and Service Plan Reviews; enter and view Progress Notes; view Case Summary, etc.).



Use the **To-Do** button if you want to open the Staff To-Do List. From the Staff To-Do list, you can:

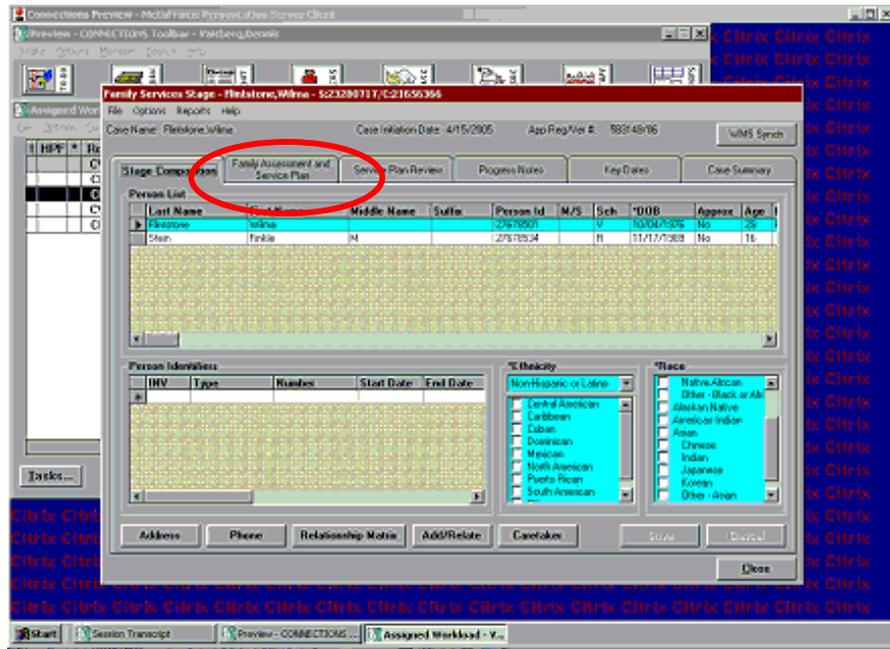
- 1) View alerts related to events in cases (when FASPs are coming due, when a new worker has been added, etc.)
- 2) View reminders from yourself or from other CONNECTIONS users.
- 3) Navigate to points within the application to complete certain functions, such as reviewing and approving a FASP.

To-Do List Button

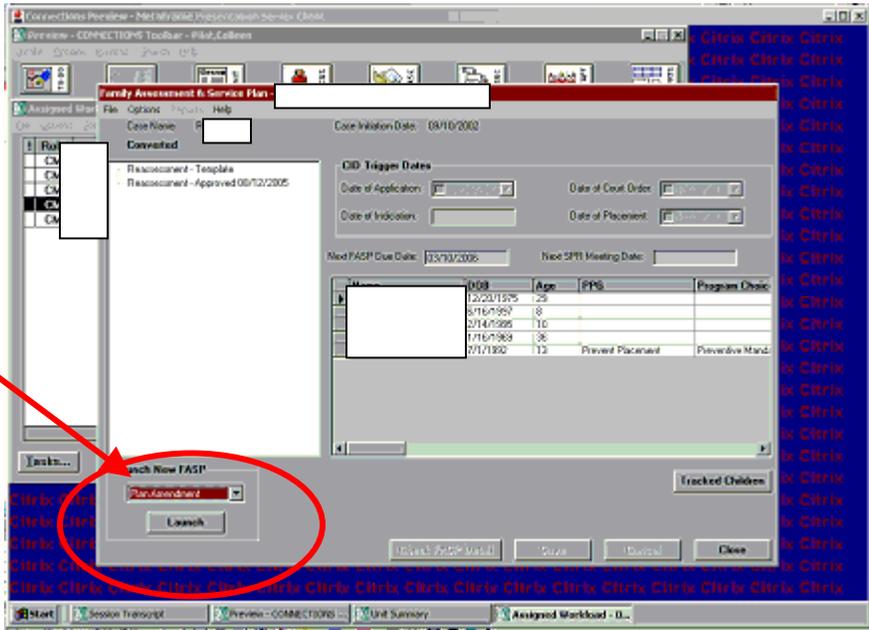
Type	Status	Date	Case Name	Stage ID	Description
A	COMP	11/05/2005	Smith, Joe	23246636	New Case Manager Assignment
A	COMP	11/04/2005	Flintstone, Wilma	23246712	New Case Manager Assignment
I	RE-JT	11/05/2005	Flintstone, Pebbles	23246727	FASP - Ejection Issued
A		11/05/2005	Flintstone, Pebbles	23246727	DW - Approve PLA FASP for F3 Stage Flintstone
A		11/05/2005	Flintstone, Pebbles	23246727	PLA FASP Rejected in F3S Stage 23246727
A		11/07/2005	Flintstone, Wilma	23246712	Plan Fields(23678534) was related in error
A		11/07/2005	Flintstone, Wilma	23246712	DW - Approve DR FASP for F3 Stage Flintstone,
A		11/02/2005	Flintstone, Wilma	23246712	DR FASP Rejected in F3S Stage 23246712
A		11/02/2005	Flintstone, Wilma	23246712	DW - Approve DR FASP for F3 Stage Flintstone,
R		11/02/2005	Flintstone, Wilma	23246712	Approval Complete! Events have been frozen.
					COE - B

Launching and Submitting a Plan Amendment

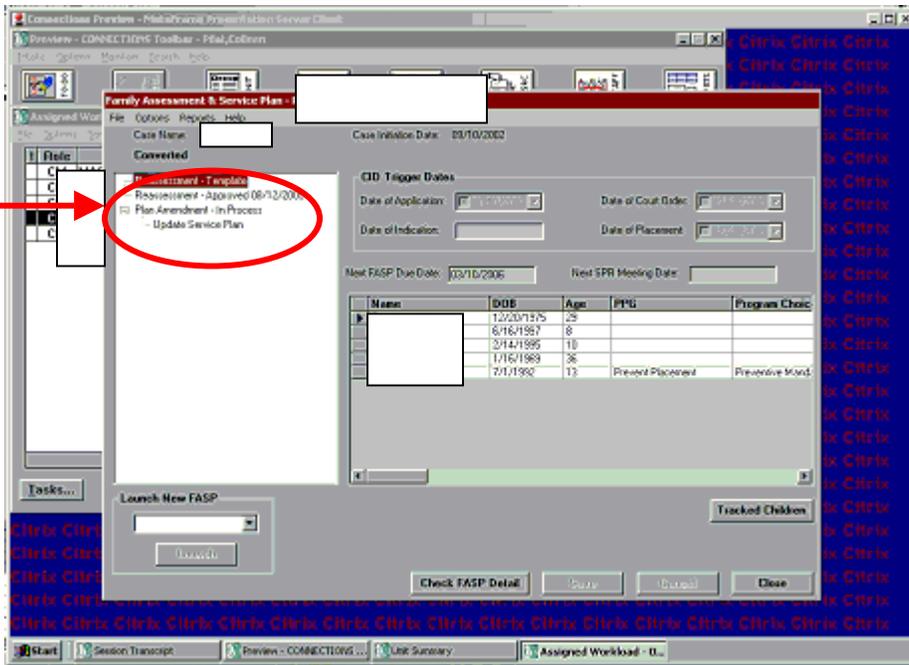
To complete a Plan Amendment in CONNECTIONS, you must begin by accessing your assigned workload, highlighting the appropriate case and clicking on the “Tasks” button. This will bring you to the Stage Composition tab. Click on the Family Assessment and Service Plan (FASP) tab.



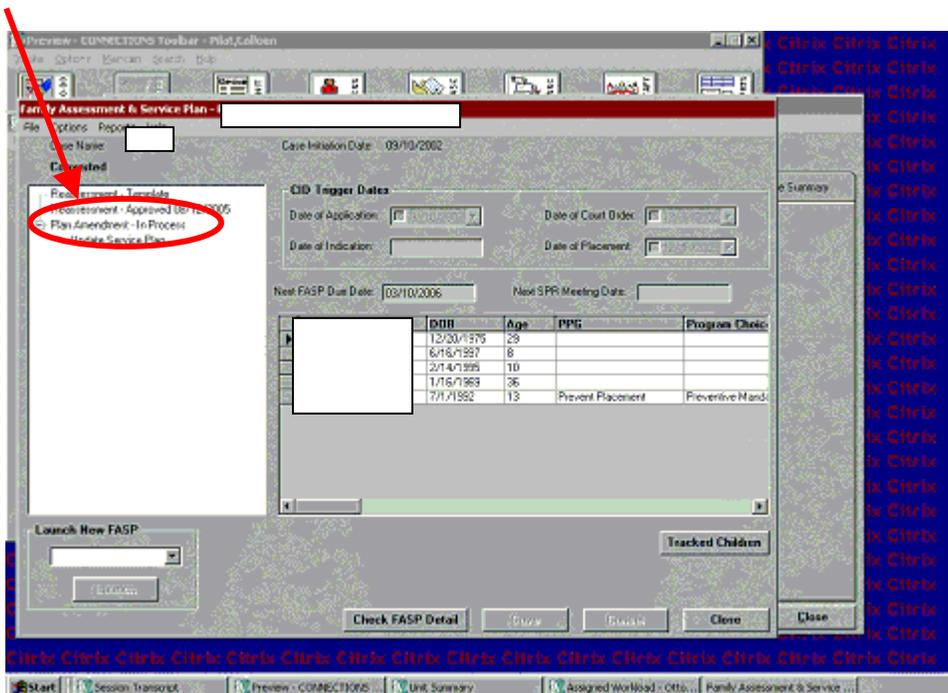
Click on the dropdown entitled “Launch New FASP”. A Plan Amendment is available for launch in an FSS/CWS stage outside of the launch window of any FASP (i.e. 30 days prior to the Comprehensive or 60 days prior to the Reassessment), unless the case is being closed. A Plan Amendment is available for launch at any time in a FSS/CCR, regardless of the FASP due dates. Select “Plan Amendment” and click on the “Launch” button.



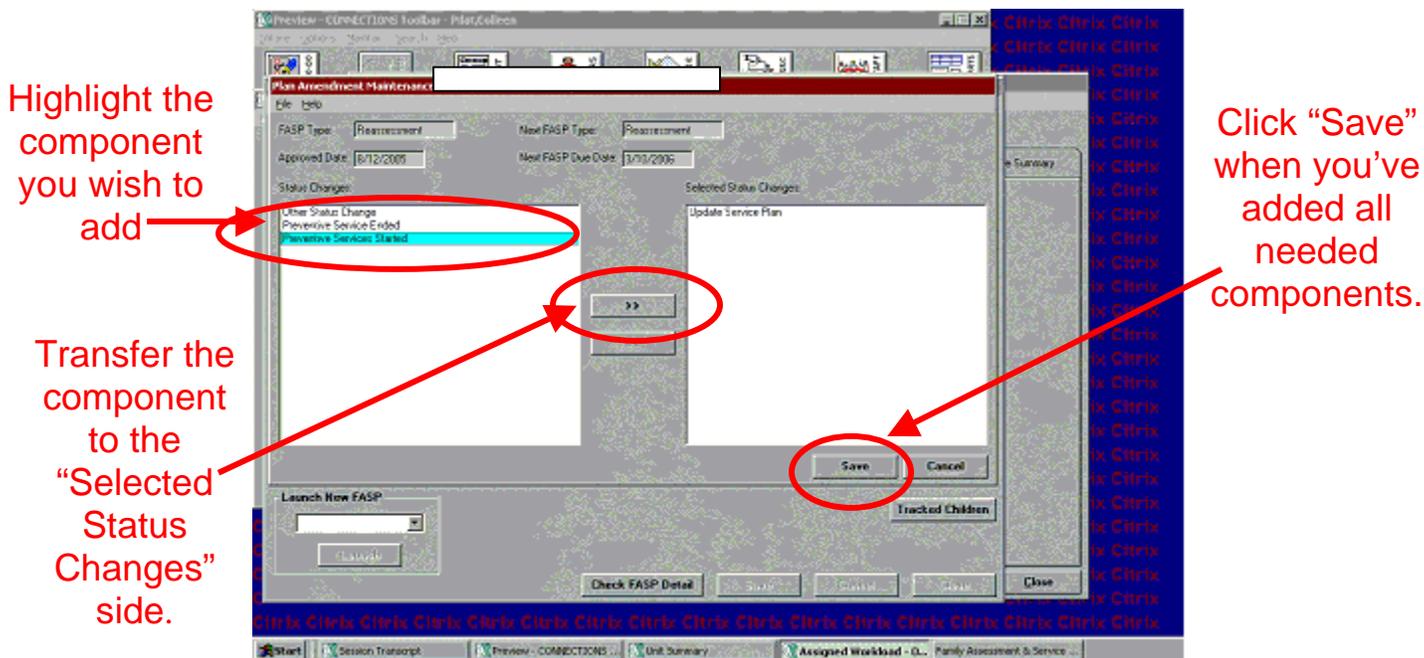
Click on the "+" next to the Plan Amendment.



Click on “Plan Amendment – In Process”.

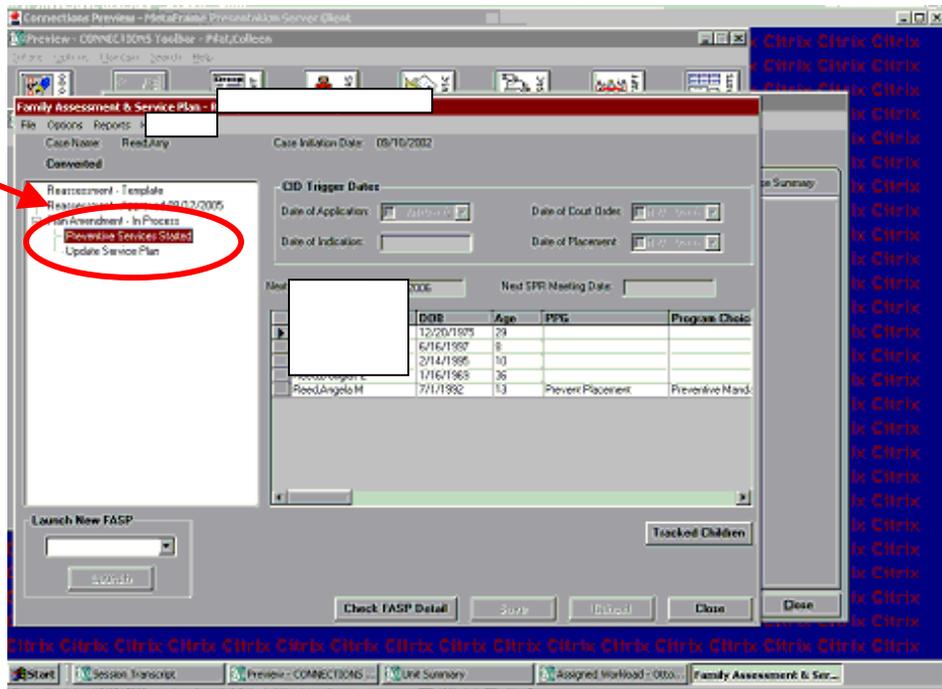


Highlight the components necessary for this Plan Amendment in the left column and then transfer them to the right column. Then click on the “Save” button. If a component is added in error, highlight it in the right column and use the back arrow button to remove it.



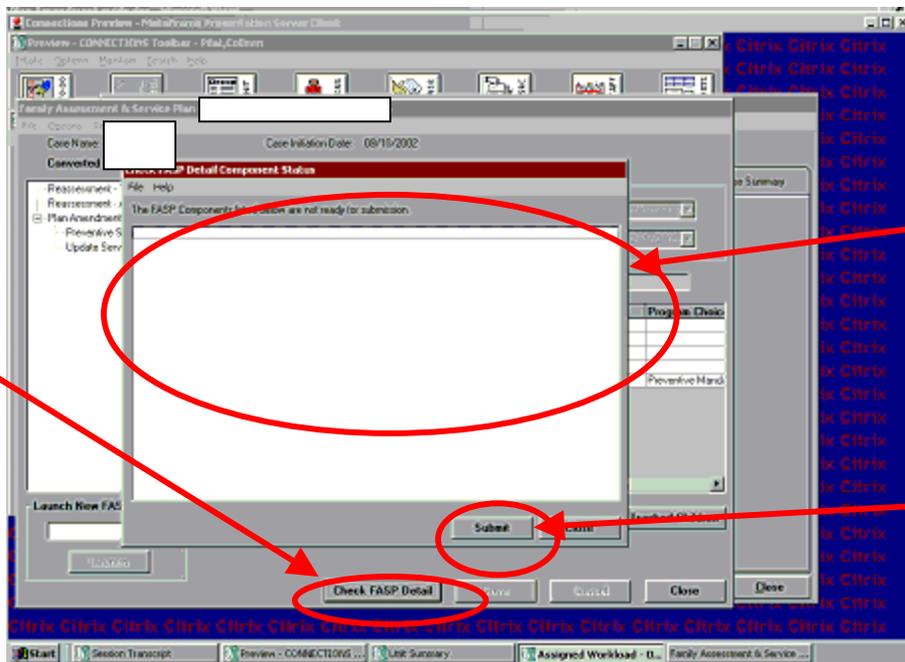
In the FASP tree, click on one of the components you've added, and complete all of the required fields. Click “Save” and do the same for any other required components, including the “Update Service Plan” window.

Click on a component and complete the fields. Do the same for all sections.



When you are finished, click on the “Check FASP Detail” button”. If there are no components listed, you are ready to submit the Plan Amendment. If there are any sections listed, complete them and then return to this screen. Click on the “Submit” button when it is enabled to initiate the submission process.

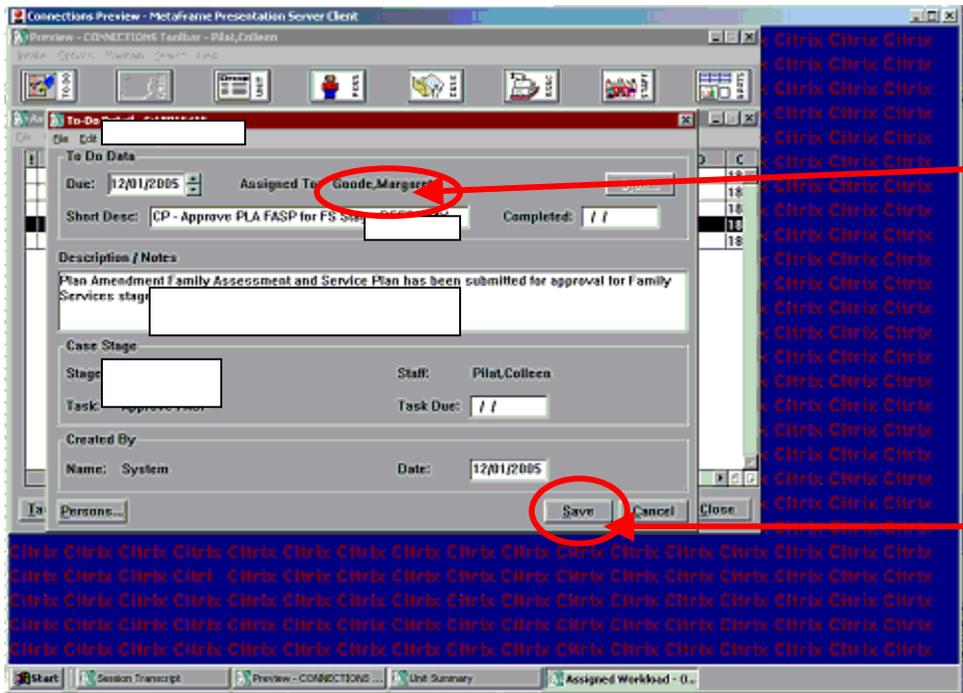
Click on “Check FASP Detail” button first.



If this section is blank, then you're ready to submit

Click on the “Submit” button.

Click “Save” on the “To-Do Detail” window to create a Plan Amendment approval task To-Do to the Case Planner’s Unit Approver and the Case Manager. If you wish to add another approver, answer ‘Yes’ to the question. Otherwise, click ‘No’.



Your Supervisor's name here

Click "Save" to finish submitting the Plan Amendment and create a task To-Do

Successful Completion of a FASP: Frequently Asked Questions

How do I launch a FASP?

A new FASP is launched via the Launch New FASP section in the lower left corner of the FASP window, accessed by highlighting the case on the Workload, clicking the “Tasks” button, and clicking on the “Family Assessment and Service Plan” tab. The Launch button enables once a FASP type has been selected. The system permits anyone with a role in the case to launch a FASP.

How do I know a FASP has been launched?

This is found in the FASP window of the FSS by highlighting the case on the Workload, clicking the “Tasks” button, and clicking on the “Family Assessment and Service Plan” tab. Find the FASP listed on the left, if it reads “In Process”, than it has been launched.

What are the FASP types?

Four types of FASPs can be generated: Initial (due 30 days from the CID or 7 days from the date of the approval of the Investigation Conclusion in a CPS case), Comprehensive (due 90 days from CID), Reassessment (first Reassessment is due 210 days from CID, all subsequent Reassessment FASPs come due 6 months after the previous one) and Plan Amendment (to record status changes outside the periodic schedule).

When can I launch a FASP?

The Initial FASP can be launched immediately upon opening the stage. The Comprehensive FASP can be launched within 30 days of its due date. The Reassessment FASP can be launched within 60 days of its due date.

How do I check the status of a FASP?

A FASP can be in one of six statuses: Not Launched, In Process, Pending, Approved, Missed, and Template Format. This is found in the FASP window of the FSS by highlighting the case on the Workload, clicking the “Tasks” button, and clicking on the “Family Assessment and Service Plan” tab. In addition, this information can be found in the Service Plan by highlighting the case on the Workload, clicking the “Tasks” button, and clicking on the “Service Plan Review” tab. The Service Plan Review tab will display a list of the status of the FASPs along with SPR information.

Not Launched: FASP has not yet been launched (started).

In Process: The FASP has been launched and is in the process of being completed. There can only be one In Process FASP at a time. If a FASP

was submitted for approval and rejected, the status will revert from 'Pending' to 'In Process.'

Pending: The FASP has been submitted to the supervisor and case manager and is awaiting approval. It will remain in pending status until all of the reviewers have approved the FASP.

Approved: The submitted FASP has been approved.

Missed: The FASP was never launched, is overdue, and the more recent FASP has been launched. Once a FASP is marked as missed, it can never be launched.

Template: If a FASP is in process and overdue and the next FASP is launched, the older FASP will be marked 'Template.' The Template format FASP can be updated for 60 days and then it freezes. Template FASPs cannot be electronically submitted for approval and do not carry information forward to future FASPs.

Why can't I launch a Plan Amendment?

Plan Amendments are completed when significant changes occur between FASP cycles. For an FSS/CWS stage, a Plan Amendment can only be launched after at least one FASP has been approved. For an FSS/CCR stage, a Plan Amendment is the first FASP to be launched.

If the next coming due FASP can be launched, generally, the status change information should be recorded within that coming due FASP or via progress notes (if approval is necessary prior to the FASP due date), rather than creating a Plan Amendment. The exception to this is the 30 day and 90 day removal updates, required after a child is removed and placed in foster care or in the direct custody of a relative or other suitable person (under FCA Article 10). Special functionality (Removal Update) allows those submissions to occur timely as required by law.

How do I submit a FASP for approval?

Click on the desired In-Process FASP from the FASP tree. Click on the "Check FASP Detail" button on the FASP window. If there are incomplete FASP components, click on the "Close" button and navigate to the component(s) to complete the required information. If all FASP components are complete, click on the "Submit" button. The "To-Do" window displays with the name of the appropriate approver in the "Assigned To" field. Click on the "Save" button. A question will appear asking if you'd like to add another approver. The Case Planner's Unit Approver and the Case Manager will automatically receive a Task To-Do for approval. If you don't want to add any other approvers, click "No." Otherwise, click "Yes" and conduct a staff search to add the additional approver.

All the components to the FASP are completed but I still can't submit the FASP, why?

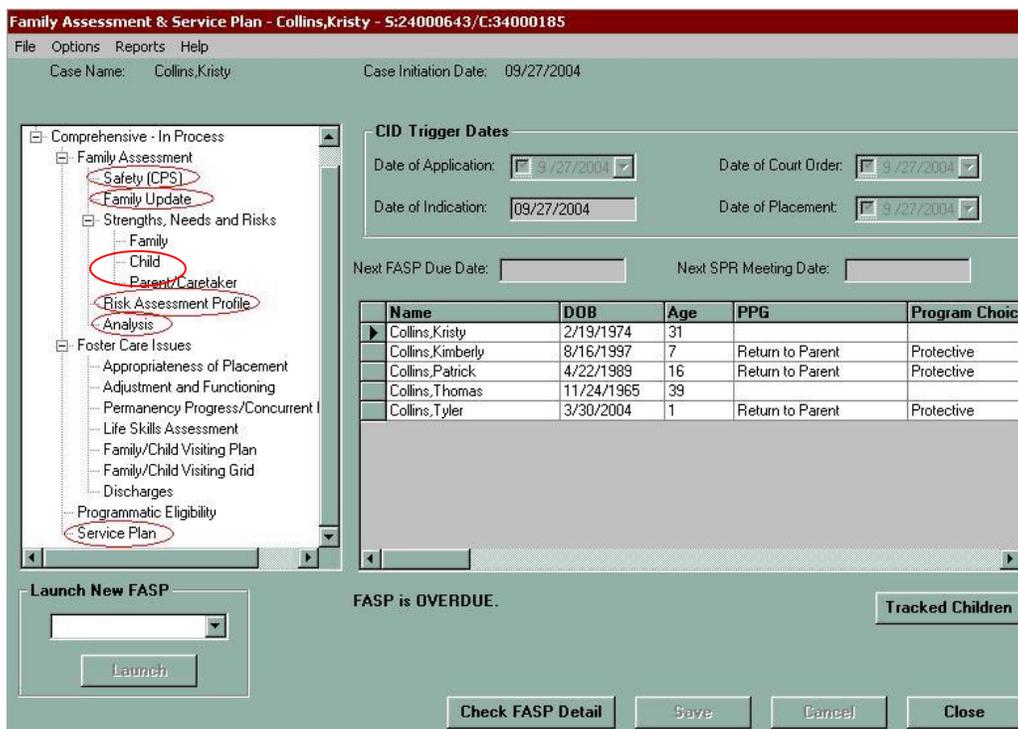
If you've clicked on the 'Check FASP Detail' button in the FASP window and there aren't any components listed, yet the 'Submit' button still isn't enabled, then:

- The worker trying to submit the FASP may not be the Case Manager or Case Planner.
- The FASP due date may be more than 30 days from the date of attempted submission.

When I click on 'Check FASP Detail,' the same things keep showing up as incomplete, but I know I completed them. What should I do?

There are several areas of the FASP that users may encounter as incomplete. This section will outline the most common problems that may be the reason why the FASP is showing up as incomplete and the steps needed to address them and complete the work.

The most common components of the FASP that users will see listed as incomplete when they press the "Check FASP Detail" button will be the **Analysis, Family/Child Update, Risk Assessment Profile, Service Plan, and Safety (CPS)** components.



In the **Analysis, Family/Child Update, and Service Plan** components, the proper completion of the Case Planner Summaries appear to be the most common areas of confusion. There are six Case Planner Summaries that must be completed—four in the **Analysis** section, one in the **Family/Child Update** section, and one in the **Service Plan** section.

Until the Case Planner Summary has been properly completed, the *Launched* check box will not become checked by the system, and the FASP will not be ready for submission.

Date of Entry	Author	Status
8/1/2005	Wilson156,Darryl	Final

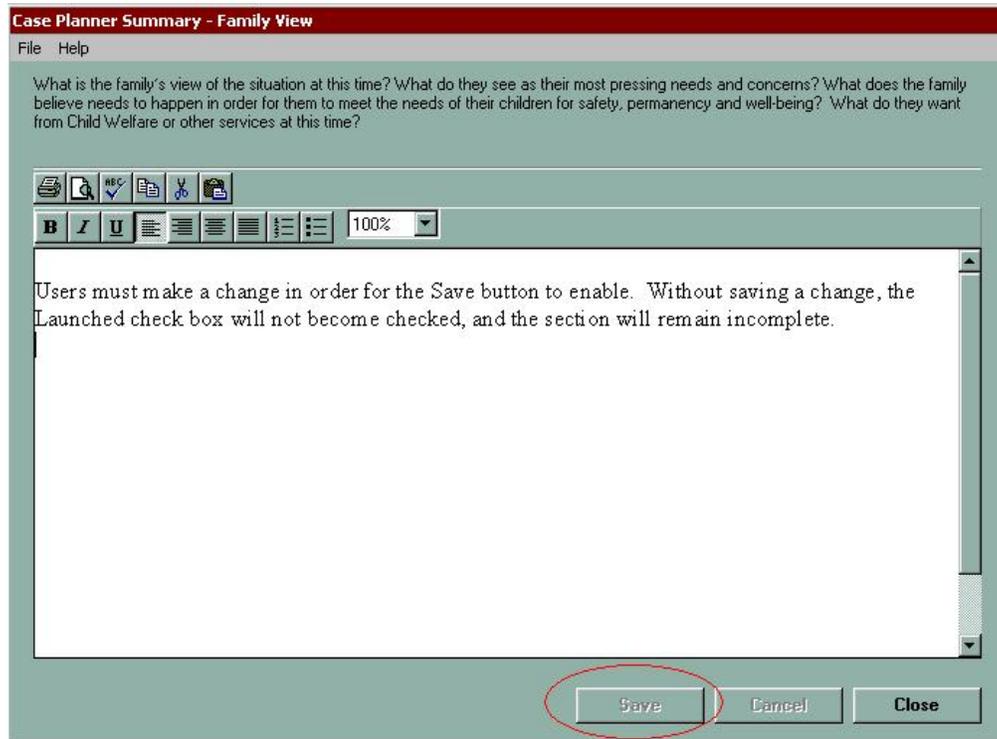
What is the family's view of the situation at this time? What do they see as their most pressing needs and concerns? What does the family believe needs to happen in order for them to meet the needs of their children for safety, permanency and well-being? What do they want from Child Welfare or other services at this time?

Case Planner Summary **Launched**

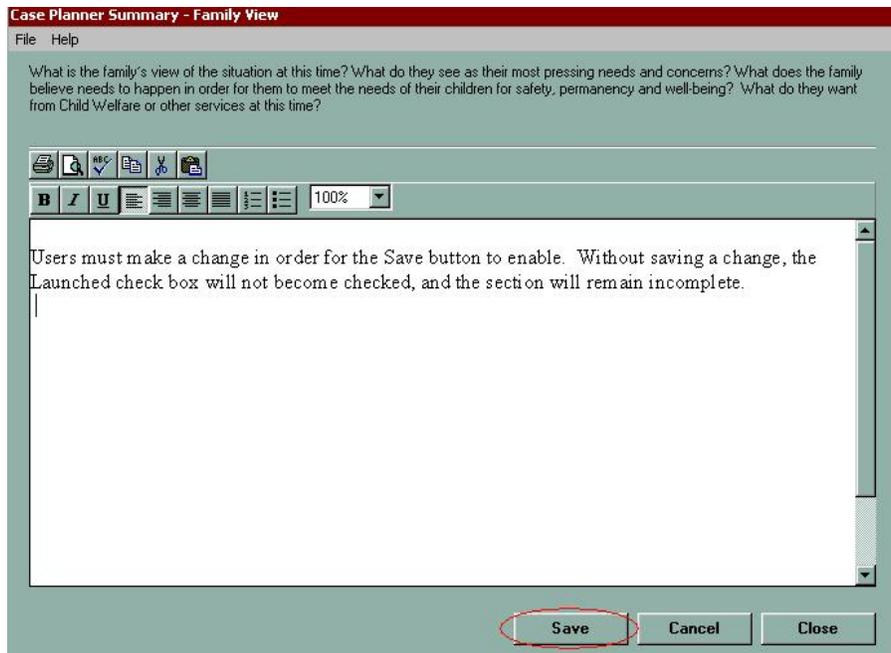
Clear Save as Draft Save as Final Cancel

Close

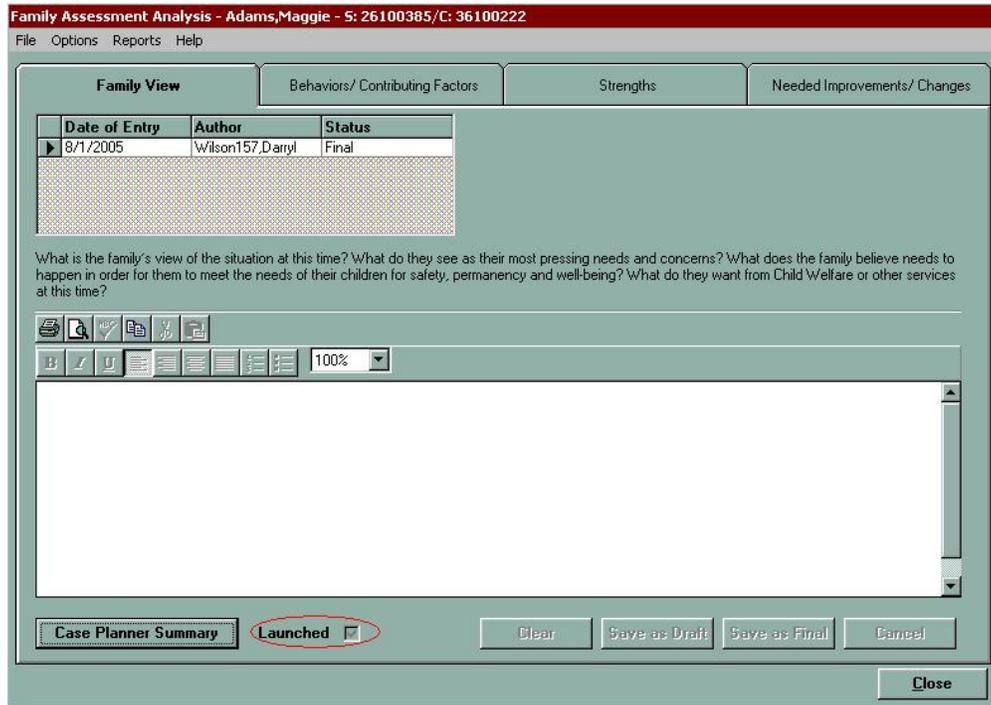
Upon clicking the “Case Planner Summary” button, all information entered in the previous screen will be pulled together on one screen so that the Case Planner can review, correct, update, and integrate the information into a clear, cohesive narrative. The system was built to expect there to be changes to the Summary as the Case Planner integrates various entries as necessary and will not allow the Save button to be enabled until such casework activity has occurred.



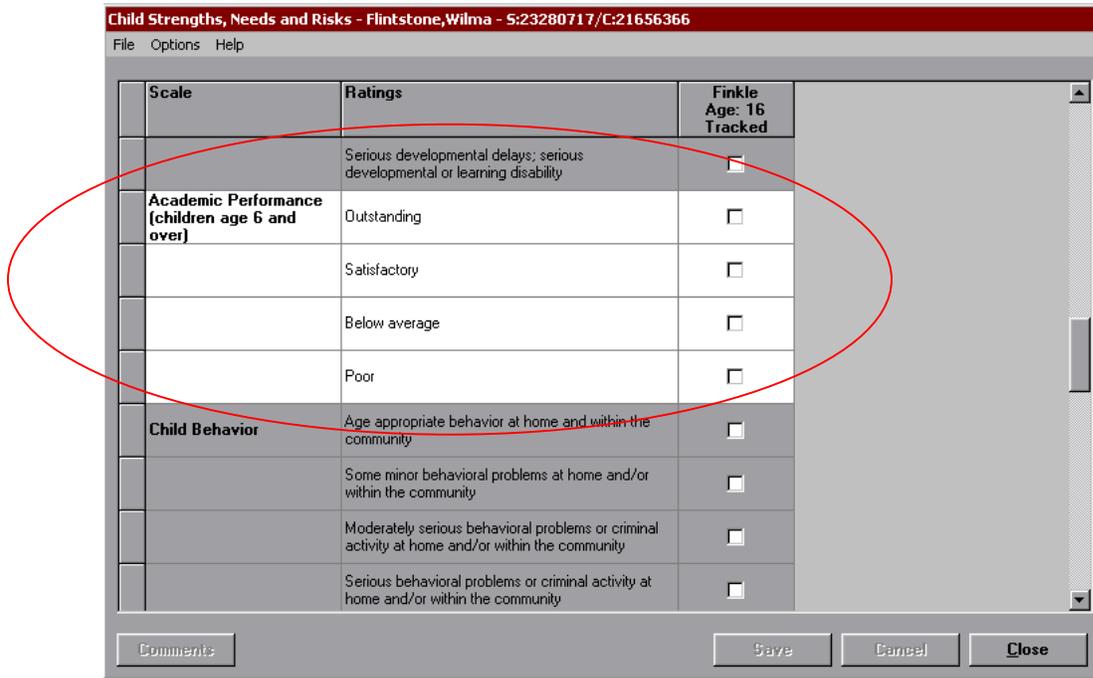
There may be occasions when the Case Planner does not see the need for any changes in the Case Planner Summary window, such as when the Case Planner is also the Case Manager and has authored the entry from the previous screen. The system will continue to look for a modification in the window in recognition that the Case Planner has addressed the content. The easiest solution to this situation is to press the *Space Bar* key on the keyboard, which will add a blank space to the Case Planner Summary and enable the “Save” button. The “Save” button may then be pressed, followed by the “Close” button.



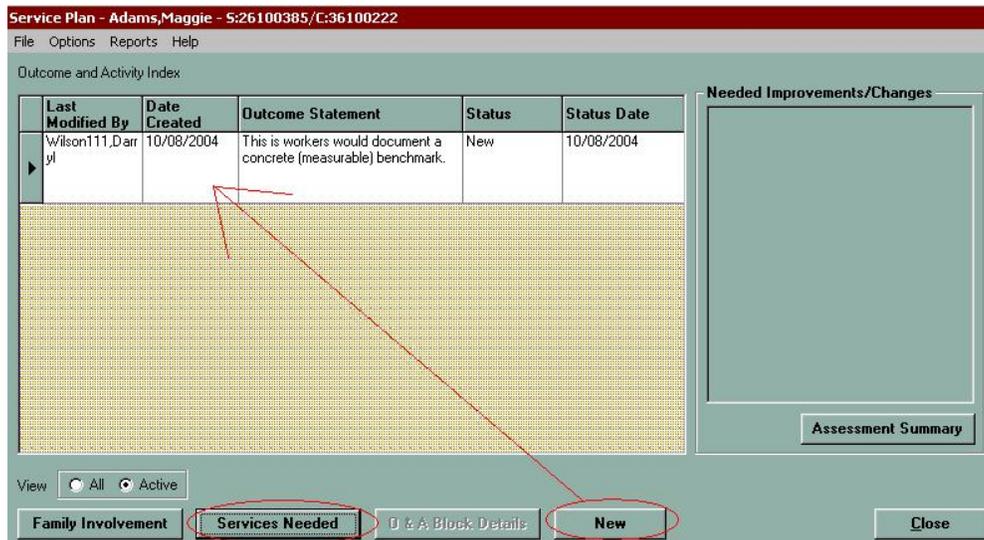
This will cause the system to fill in the *Launched* check box, indicating that the Case Planner Summary has been completed and that section is ready for FASP submission.



Occasionally, the Child Scales in the Strengths, Needs and Risks section of the FASP will show as incomplete on the 'Check FASP Details' window. This is often due to the worker missing one or more of the age-specific questions. The age-specific questions are required based on the age of the child when the FASP is due, not when the FASP is in Process. So, if a child is five years old while the FASP is being worked on but s/he will be six when the FASP is due, the questions related to children ages six and over must be answered for that particular child.



Another section of the FASP that can cause the FASP to be incomplete is the **Service Plan** section. All FASPs need to have appropriate Outcome and Activity blocks developed and completed as part of service planning. In the event that the FSS is being closed, at least one Outcome and Activity Block must be entered for the case. Many workers find that the Outcome and Activity Blocks are very similar to the Service Plan section of the templates previously used to document assessment and service plans prior to the implementation of Build 18 of CONNECTIONS.



If there are no pre-existing Outcome and Activity Blocks, a new one must be created by clicking on the “New” button. This will open a window that will allow for entry of the information regarding the Outcome and Activity.

The **Safety (CPS)** component of the FASP contains a *Ready for FASP Submission* check box in the lower left area of the screen that must be manually checked once all pertinent information for this component has been entered. Also, ensure that all four tabs across the top of this component have been viewed and information entered as required.

The screenshot shows the 'Safety Assessment' software interface. At the top, the title bar reads 'Safety Assessment - Adams, Maggie - S:26100385/C:36100222'. Below the title bar is a menu bar with 'File', 'Options', and 'Help'. The main window has four tabs: 'Safety Factors', 'Mitigating Strengths/Resources', 'Safety Decision', and 'Safety Interventions'. The 'Safety Factors' tab is selected, displaying a list of safety factors with checkboxes. The 'Ready For FASP Submission' checkbox at the bottom left is circled in red. Other elements include a 'Spell Check' button and 'Save' and 'Close' buttons.

A *Ready for FASP Submission* check box also appears in the **Risk Assessment Profile** component of the FASP. This check box requires the Case Planner to complete several activities before it becomes enabled.

The first task to be completed is to answer Question #1. The system will automatically count the number of Indicated CPS reports and pre-fill the drop down box.

If this automatic count is correct, the *Verify System Response is Accurate* box should be checked.

If this is incorrect, the correct response should be chosen from the drop down box, and the *Verify System Response is Accurate* check box will become disabled.

Risk Assessment Profile - Adams,Maggie - 5: 26100385/C: 36100222

File Options Help

Primary Caretaker: Secondary Caretaker:

1. Indicated CPS report(s) since the last assessment and Service Plan: Verify System Response is Accurate

2. Child(ren) in RAP family unit is currently or was previously in the care or custody of substitute caregivers or foster parents: Yes No

3. Child(ren) under one year old in RAP family unit: Yes No

4. Caretaker(s) views the abuse/maltreatment situation as seriously as the caseworker. Yes No Yes No

5. **Primary Caretaker Progress With Plan**

Awaiting initiation of services, compliant with referrals.

Participating in services and actively pursuing case plan objectives, or has successfully completed all services recommended.

Participating in services but not actively pursuing case plan objectives, or refused or dropped out of services.

Secondary Caretaker Progress With Plan

Awaiting initiation of services, compliant with referrals.

Participating in services and actively pursuing case plan objectives, or has successfully completed all services recommended.

Participating in services but not actively pursuing case plan objectives, or refused or dropped out of services.

Preliminary Risk Rating: Final Risk Rating: Ready for FASP Submission

Preliminary Risk Score:

The second task is to answer all other risk element questions on the screen. The 'Elevated Risk' button then becomes enabled.

The Elevated Risk button must then be clicked and the elevated risk element questions contained in the box that appears must be answered.

Risk Assessment Profile - Adams,Maggie - 5: 26100385/C: 36100222

File Options Help

Primary Caretaker: Secondary Caretaker:

1. Indicated CPS report(s) since the last assessment and Service Plan: Verify System Response is Accurate

2. Child(ren) in RAP family unit is currently or was previously in the care or custody of substitute caregivers or foster parents: Yes No

3. Child(ren) under one year old in RAP family unit: Yes No

4. Caretaker(s) views the abuse/maltreatment situation as seriously as the caseworker. Yes No Yes No

5. **Primary Caretaker Progress With Plan**

Awaiting initiation of services, compliant with referrals.

Participating in services and actively pursuing case plan objectives, or has successfully completed all services recommended.

Participating in services but not actively pursuing case plan objectives, or refused or dropped out of services.

Secondary Caretaker Progress With Plan

Awaiting initiation of services, compliant with referrals.

Participating in services and actively pursuing case plan objectives, or has successfully completed all services recommended.

Participating in services but not actively pursuing case plan objectives, or refused or dropped out of services.

Preliminary Risk Rating: Final Risk Rating: Ready for FASP Submission

Preliminary Risk Score:

Once all of the steps outlined above have been completed, the *Ready for FASP Submission* check box will become enabled, and must be manually checked in order for the **Risk Assessment Profile** component to be complete.

Risk Assessment Profile - Adams,Maggie - S: 26100385/C: 36100222

File Options Help

Primary Caretaker: Secondary Caretaker:

1. Indicated CPS report(s) since the last assessment and Service Plan: Verify System Response is Accurate:

2. Child(ren) in RAP family unit is currently or was previously in the care or custody of substitute caregivers or foster parents: Yes No

3. Child(ren) under one year old in RAP family unit: Yes No

4. Caretaker(s) views the abuse/maltreatment situation as seriously as the caseworker. **Primary Caretaker** Yes No **Secondary Caretaker** Yes No

5. **Primary Caretaker Progress With Plan**

Awaiting initiation of services, compliant with referrals.

Participating in services and actively pursuing case plan objectives, or has successfully completed all services recommended.

Participating in services but not actively pursuing case plan objectives, or refused or dropped out of services.

Secondary Caretaker Progress With Plan

Awaiting initiation of services, compliant with referrals.

Participating in services and actively pursuing case plan objectives, or has successfully completed all services recommended.

Participating in services but not actively pursuing case plan objectives, or refused or dropped out of services.

Preliminary Risk Rating: Final Risk Rating: Ready for FASP Submission

Preliminary Risk Score:

Mapped Risk **Elevated Risk**

Why are the wrong people displayed in the Strengths, Needs, and Risks Scales?

The **Family Scales** display columns for each *household* within the stage and the system considers a specific address to be a household. These scales are address specific and should not be confused with the Parent/Caretaker Scales. Note that the system considers “115 Main St” and “115 Main Street” to be two separate addresses—so be sure that all household members have the exact same address in the system. The name of the Primary Caretaker displays as the title for the household in which the Primary Caretaker resides. The Secondary Caretaker’s name displays as a second household if the Secondary Caretaker lives at a different address than the Primary Caretaker. If a household exists that contains neither the Primary nor Secondary Caretaker, the name of the eldest person living at the address (within the stage) displays as the title of the scale. The Family Scales must be completed for the Primary Caretaker’s household before the FASP can be submitted for approval.

The **Child Scales** display columns for each child listed within a stage. A column appears with the first name, age and tracked child indicator (if applicable) for each child. A child is defined as an individual under 18 years of age with a relationship of ‘Child,’ ‘Step-child,’ ‘Grandchild,’ ‘Niece/Nephew,’ or ‘Ward’ within the Relationship Matrix, or an individual who is 18-21 years of age with an active Permanency Planning Goal.

The **Parent/Caretaker Scales** display columns for individuals identified as one of the following: Primary Caretaker, Secondary Caretaker, an individual with a relationship of 'Mother' or 'Father' in the Relationship Matrix, or older than 18 with no active PPG.

How do I resubmit a FASP if it was rejected?

When a FASP has been rejected, a Task To-Do will show on the submitting person's (usually the Case Planner) To-Do list with a status of 'REJT.' Select the appropriate Task To-Do and click on the "Detail" button. The detail window displays and the comments can be viewed. Click on the "Cancel" button. Reselect the task with the status of 'REJT' and then click on the "Navigate" button. The FASP window will now display. Make the required changes to the FASP and then resubmit the FASP to the approver.

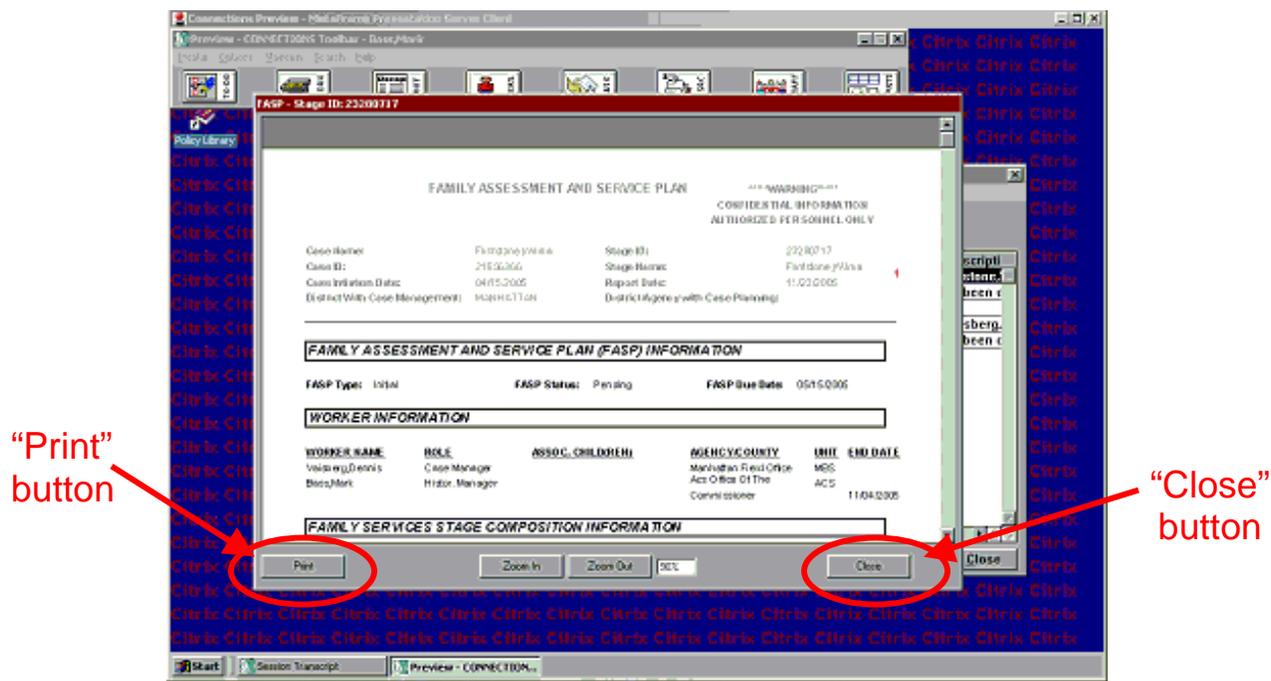
Reviewing and Approving the FASP

In the To-Do screen, sort by To-Do type (to bring all Tasks to the top of the list.), highlight the Task (T) in question and click “Navigate” button.

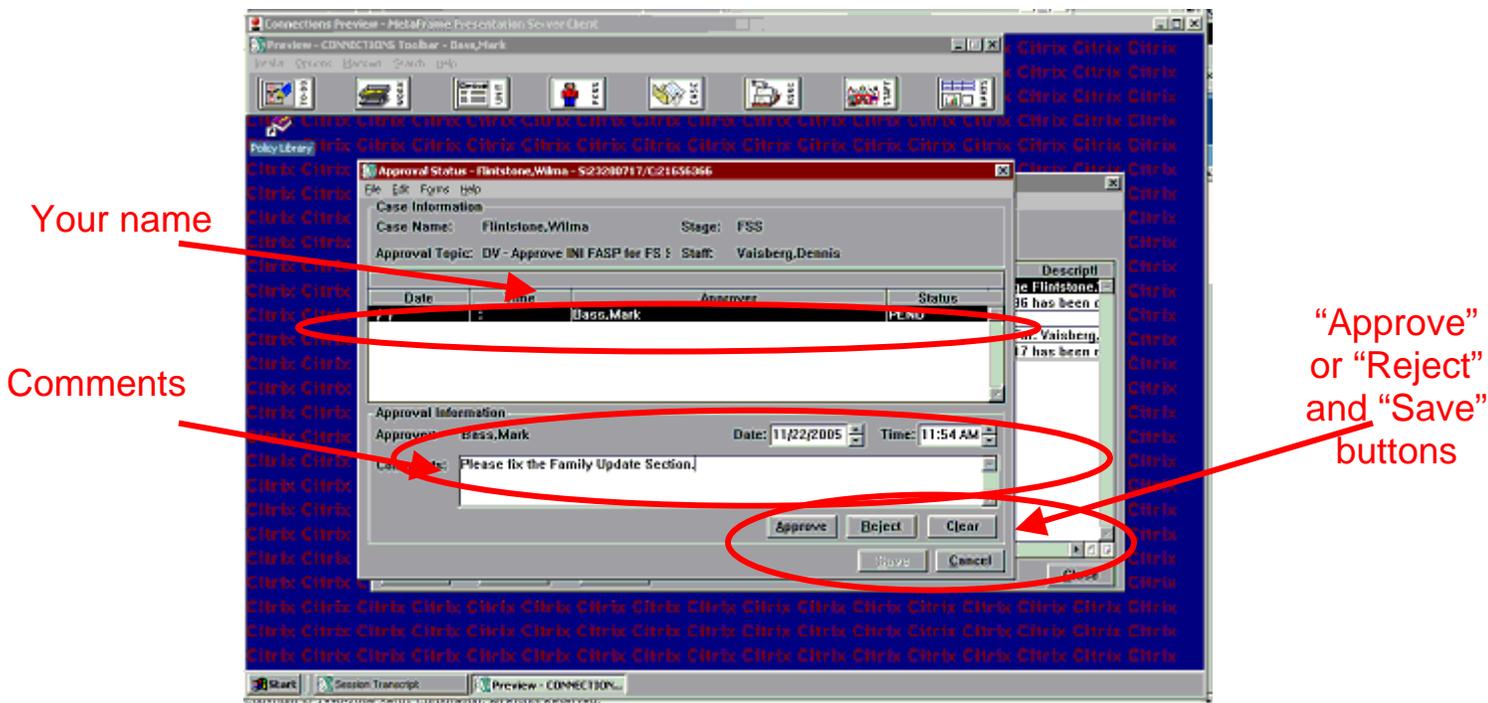
The screenshot shows the 'Connections Preview' window with a 'To-Do' list. A red circle highlights the 'Sort by To-Do type' dropdown menu. Another red circle highlights the 'Navigate' button at the bottom of the window. A third red circle highlights a specific task row in the list: 'T PROC 11/23/2005 Flintstone,Wilma 23280717 DV - Approve INI FASP for FS Stage Flintstone...'. The task list contains the following data:

Type/Status	Date	Case Name	Stage ID	Description
T PROC	11/23/2005	Flintstone,Wilma	23280717	DV - Approve INI FASP for FS Stage Flintstone...
A COMP	11/25/2005	Smith,Joe	23280696	A Family Services Stage 23280696 - Open t...
A COMP	11/25/2005	Smith,Joe	23280696	New Case Manager Assignment
A COMP	11/04/2005	Flintstone,Wilma	23280717	New Case Manager Assignment For: Vaisberg...
A	11/04/2005	Flintstone,Wilma	23280717	A Family Services Stage 23280717 has been c...

The FASP report will appear in print preview, you may Print the FASP report by clicking the "Print" button or read it on your computer monitor. After doing so, click the "Close" button. The FASP report cannot be saved to a drive on your computer.

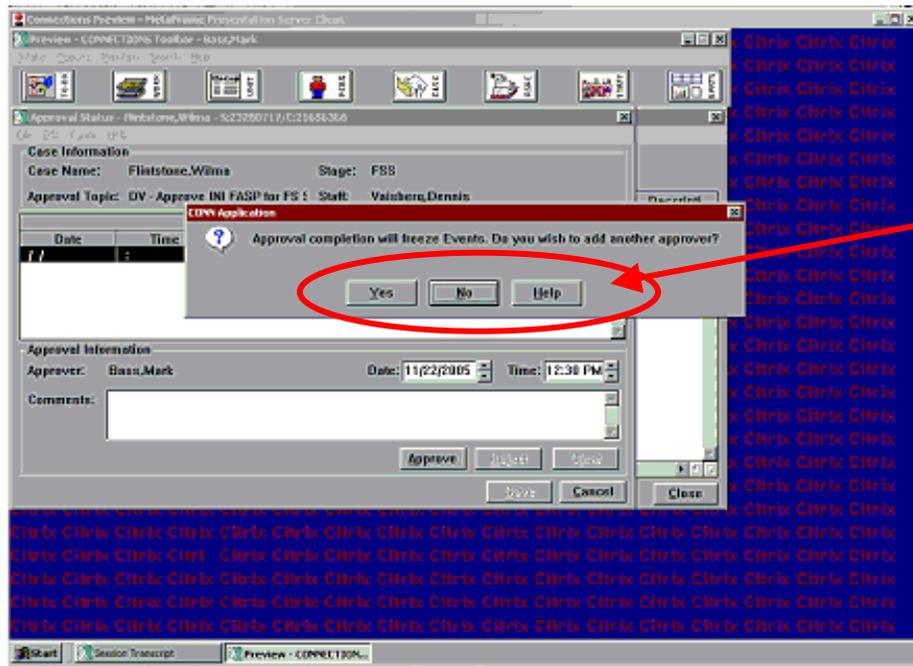


The "Approval Status" window will then appear with your name and the Case Planner's unit approver. You cannot reject a FASP without a comment - the 'Reject' button will not be enabled. If you choose to reject the FASP, type in your comments explaining why the FASP is being rejected, click the "Reject" button, and then click "Save".



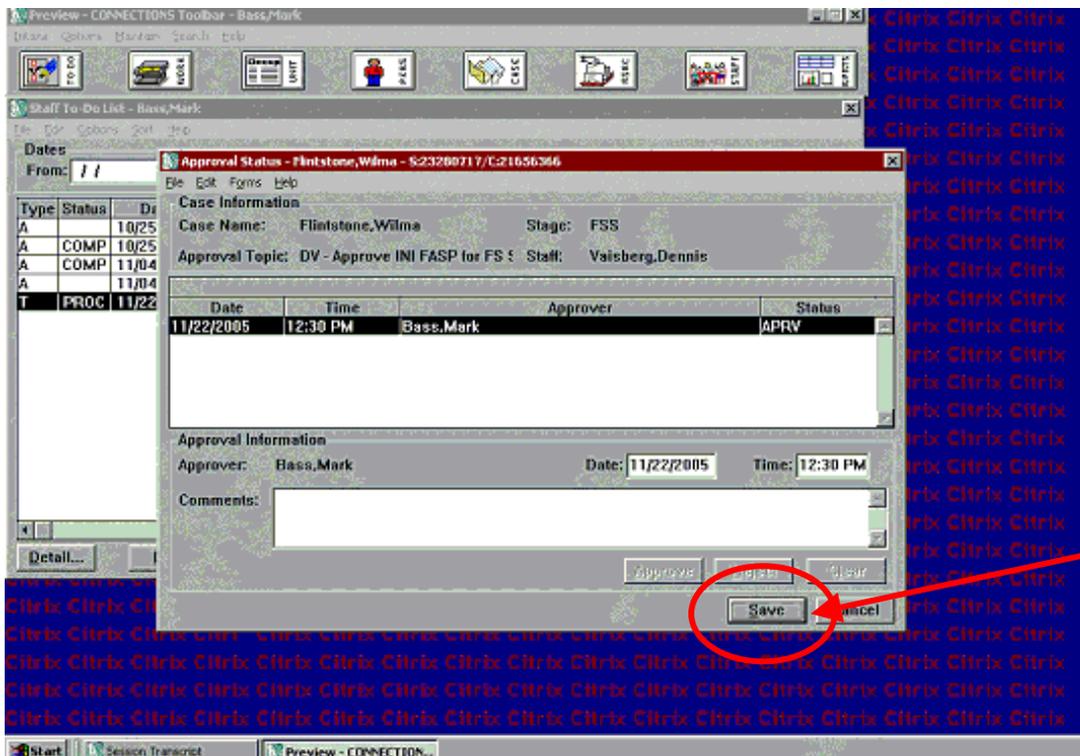
If you've decided to reject the FASP, the Case Planner will receive an alert telling them that the FASP has been rejected. They must make the corrections or add the necessary information, etc. as recommended and then resubmit the FASP. If

you approved the FASP, a pop-up appears asking if you'd like to add another approver. Answer 'Yes' if you would like to send the approved FASP to your supervisor for review.



Answer yes to send the FASP Approval to your supervisor.

Click on the "Save" button to finalize your approval of the FASP.



"Save" Button

Permanency Bill Changes with Build 18.7

What activities must be completed in CONNECTIONS when a Child has been removed?

1. You must change the Program Choice and PPG, for each child removed from the home, in CONNECTIONS. Make sure that the effective dates are correct.
2. The Removal Information Tab in the Tracked Children screen must be completed for each removed child.
3. When a child is removed from the home, a child specific assessment is required to be completed no later than 30 days from the date of the removal. At the same time, the Service Plan must be developed or updated and the Visiting Plan must be developed. To document that this requirement has been met, one of the following must occur.
 - A worker can launch and complete a Plan Amendment OR
 - A worker can record the removal information directly into a FASP if the FASP can be approved within 30 days OR
 - A worker can use the “Removal Update” button from the FASP screen to complete the prescribed sections of the FASP that meet the requirements for submission of the update. The worker must submit the updates from the Removal Update button. *This process should only be used with a FASP in process that will not be approved within 30 days of the removal.*
4. In addition to the initial 30-day service plan requirement, workers must complete a Comprehensive Assessment and Service Plan Review/Visiting Plan Update 90 days from the date of removal. This requirement can be met by:
 - Launching and completing a Plan Amendment OR
 - Recording the updated Service Plan/Visiting Plan information directly into a FASP if required timeframes can be met OR
 - A worker can use the “Removal Update” button from the FASP screen to complete the prescribed sections of the FASP that meet the requirements of the update. The worker must submit the updates from the Removal Update button. This process should only be used with a FASP in process that will not be approved within 90 days of the removal.

Using the Removal Information Tab

This tab is located in the Tracked Child section. To access the Removal Information tab click on the “Tracked Children” button from the FASP screen.

The screenshot shows the 'Family Assessment & Service Plan' window. At the bottom right, the 'Tracked Children' button is circled in red. A red arrow points to it from the text: 'Click on the “Tracked Children” button to access the Removal Information tab'.

Then select the Removal Information Tab. The Removal Information tab will only appear if one of the children has a Program Choice of ‘Placement’ or ‘Non-LDSS Custody’.

The screenshot shows the 'Tracked Children Detail' window. The 'Removal Information' tab is selected and circled in red. The window displays various fields for child information, including 'Program Choice/PPG', 'Placement Information', 'Associate Worker', and 'Removal Information'. The 'Removal Information' tab is currently active.

Select the child that you need to update. Then enter the physical removal date and the type of legal event. When you have made your changes press the “Save” button.

Tracked Children Detail -
File Options Help

Property Information Placement History Activities/Notes **Removal Information**

Select Child: CH 34 Age: 16 Lasteworks: Activity Date:

Next Permanency Hearing Date Certain:

Removal Information

History of Removals:

Invalid	Removal Date	Legal Event	Date Saved

Date of Physical Removal: 12/29/2005 Type of Legal Event Associated with Removal: Article 10 Abuse/Neglect

 Save

1. Select child

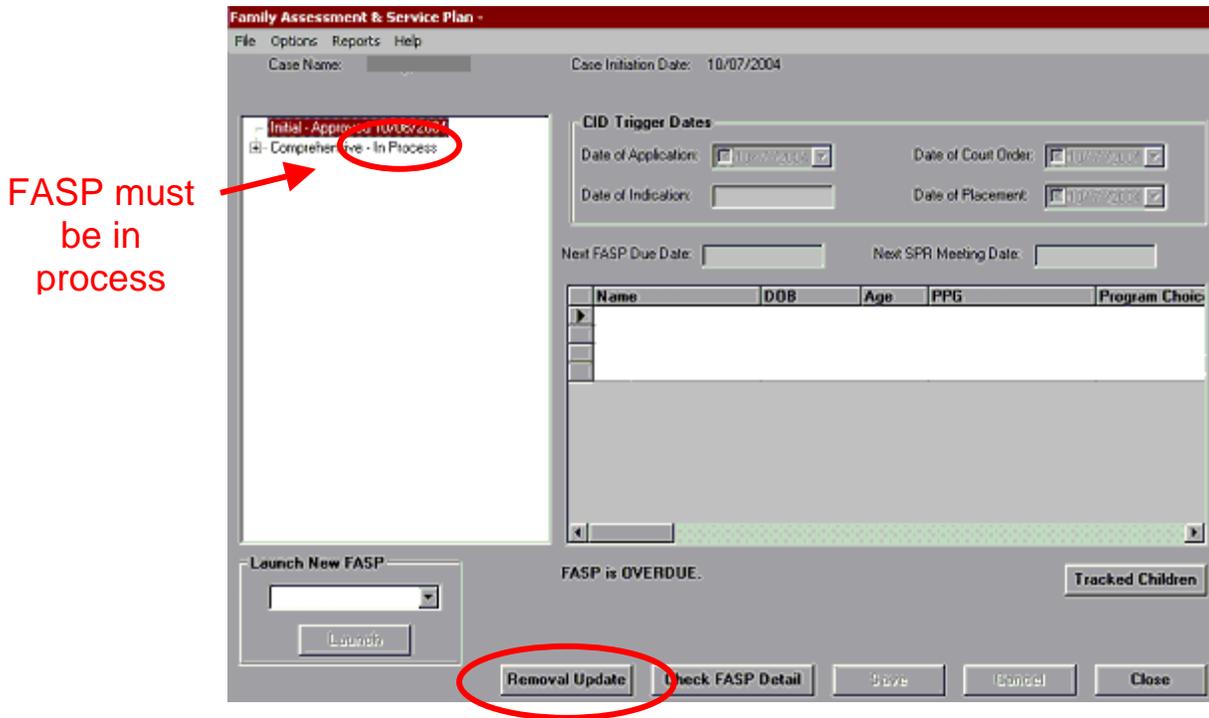
2. Enter physical removal date

3. Enter legal event

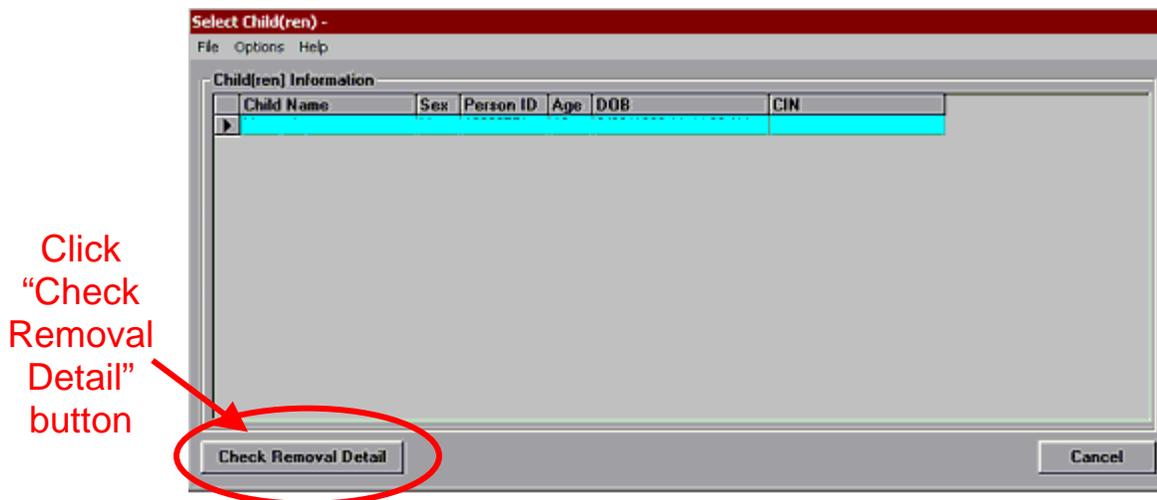
4. "Save" Button

Removal Update Button

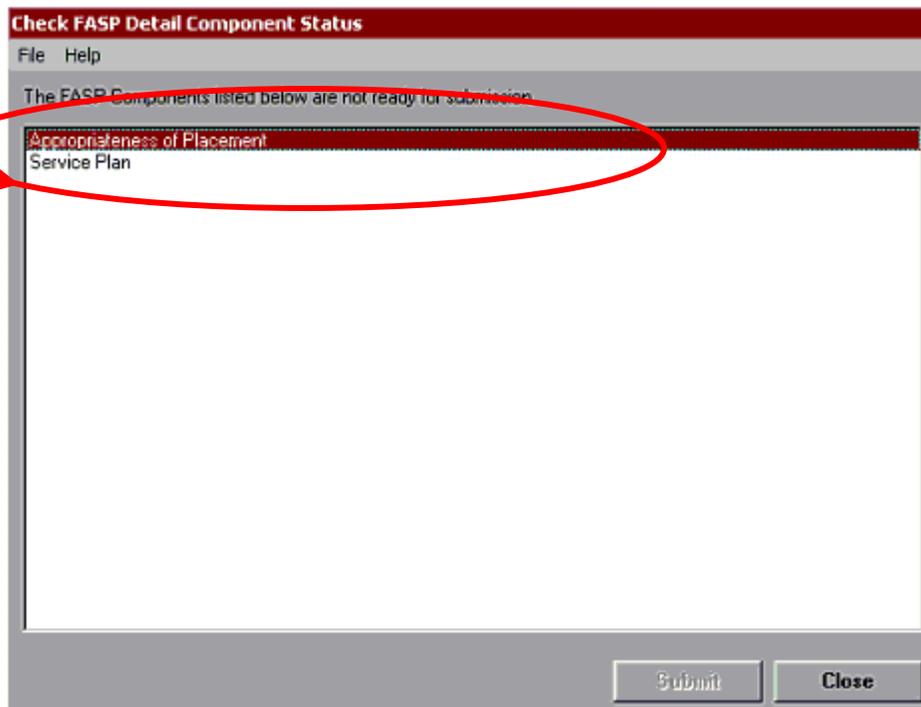
In order for the “Removal Update” button to appear you must have a FASP in process.



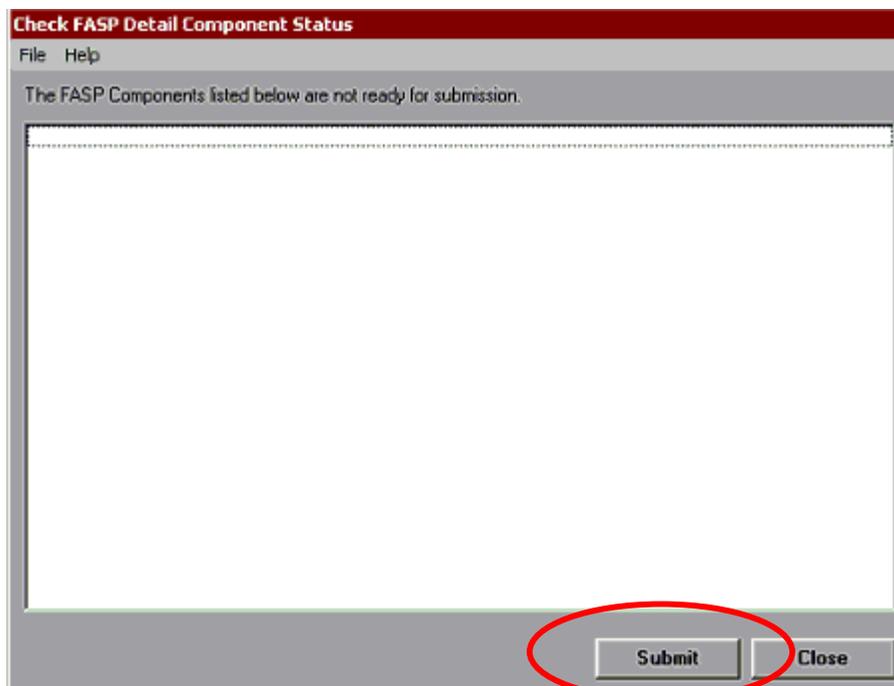
After you press the “Removal Update” button you will see a list of the children that have been removed in the last 90 days. Click the “Check Removal Detail” button to see which parts of the FASP still need to be completed before you can submit the removal update.



These need to be completed in the FASP



Once you have returned to the FASP and finished the sections that needed to be completed the "Submit" button will enable. **You do not have to complete the entire FASP to submit the update, only the sections under the Check Removal Detail.**



After you (as Case Planner) hit the "Submit" button click the "Save" button to submit the update to your Unit Approver and the Case Manager. If you wish to add another approver, answer 'Yes' to the question. Otherwise, click 'No'.

To-Do Detail - C:21718091

File Edit Options Help

To Do Data

Due: 01/03/2006 Assigned To: **Bass, Mark** [Select...]

Short Desc: DV - Approve Removal Update Report for Person G Completed: / /

Description / Notes

Removal Update Report has been submitted for approval for Family Services Stage: Griffin,Lois, Case: 21718091, Stage: 23381299, Person: Griffin,Meg, 27893624

Case Stage

Stage: Griffin,Lois Staff: Vaisberg,Dennis

Task: Approve Removal Update Task Due: / /

Created By

Name: System Date: 01/03/2006

[Persons...] [Save] [Cancel]

Your Supervisor's name here

Click "Save" to finish submitting the Removal Update Report

Completing an approval for a Removal Update Report follows the same process as approving any submitted work within CONNECTIONS. An approver completes a Removal Update Report approval by accessing his/her Staff To-Do list, selecting the Approval Task To-Do and clicking on the "Navigate" button.

If an approver rejects the Removal Update Report, a rejection Alert To-Do is generated and the Removal Update Report is deleted so that a new one can be generated and submitted for approval.

If the in-process FASP used to populate a Removal Update Report is approved while the Removal Update Report is pending approval, the Approval Task To-Do's, for the Removal Update Report, are deleted along with the Removal Update Report since the approved FASP contains the most recent removal information.

Throughout the Removal Update Report process, all sections of the in-process FASP remain modifiable so that it can be completed and submitted for approval within the required timeframe.

Discharge to Home/Relative/Other Caretaker

For the purpose of an example, “Discharge to Home/Relative/Other caretaker” through a FASP will be discussed in this section. Refer to the on-line Step-by-Step guide for guidance on other types of Discharges.

To access the discharge window, begin by selecting your assigned workload, highlight the appropriate case and click the “Tasks” button. In the Stage Composition window, click on the Family Assessment and Service Plan tab.

Click on the Family Assessment and Service Plan Tab

Last Name	First Name	Middle Name	Suffix	Person Id	M/S	Sch	*DOB	Approx	Age
Griffin	Lois			27893621		V	12/19/1971	No	34
Griffin	Peter			27893623		V	06/13/1973	No	32
Griffin	Meg			27893624		V	06/26/1988	No	17
Griffin	Stewie			27893625		V	07/19/2004	No	1
Griffin	Chris			27893626		V	04/13/1991	No	14
Griffin	Brian			27893630		V	12/21/1973	No	32

INV	Type	Number	Start Date	End Date
*				

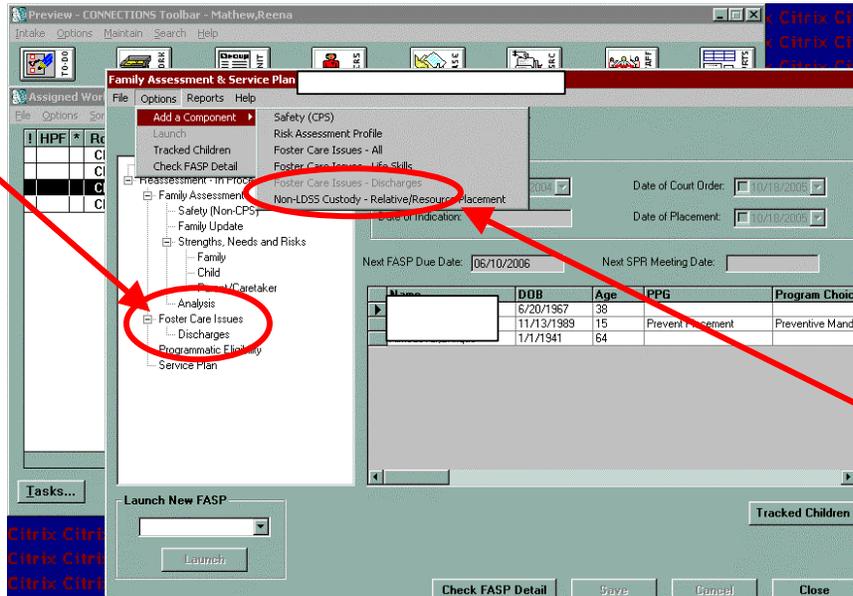
*Ethnicity: Central American, Caribbean, Cuban, Dominican, Mexican, North American, Puerto Rican, South American

*Race: Native African, Other - Black or Afr, Alaskan Native, American Indian, Asian, Chinese, Indian, Japanese, Korean, Other - Asian

Address Phone Relationship Matrix Add/Relate Caretaker Save Cancel Close

The type of FASP will be listed; you may have to launch a new FASP prior to starting the discharge procedures. Expand the FASP by clicking on “+”. Under this you can expand the folder “Foster Care Issues.” Under this will be the folder “Discharges.” If not, go to ‘Options->Add a component’ and choose “Foster Care Issues-Discharges.”

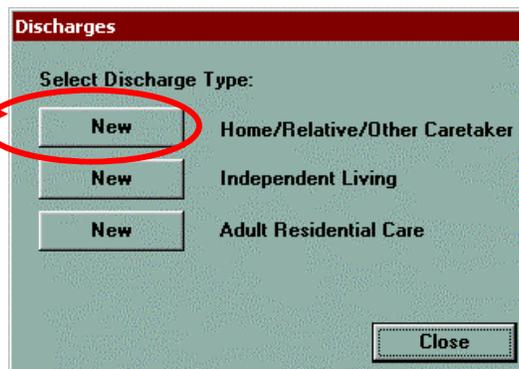
Foster Care Issues and Discharges



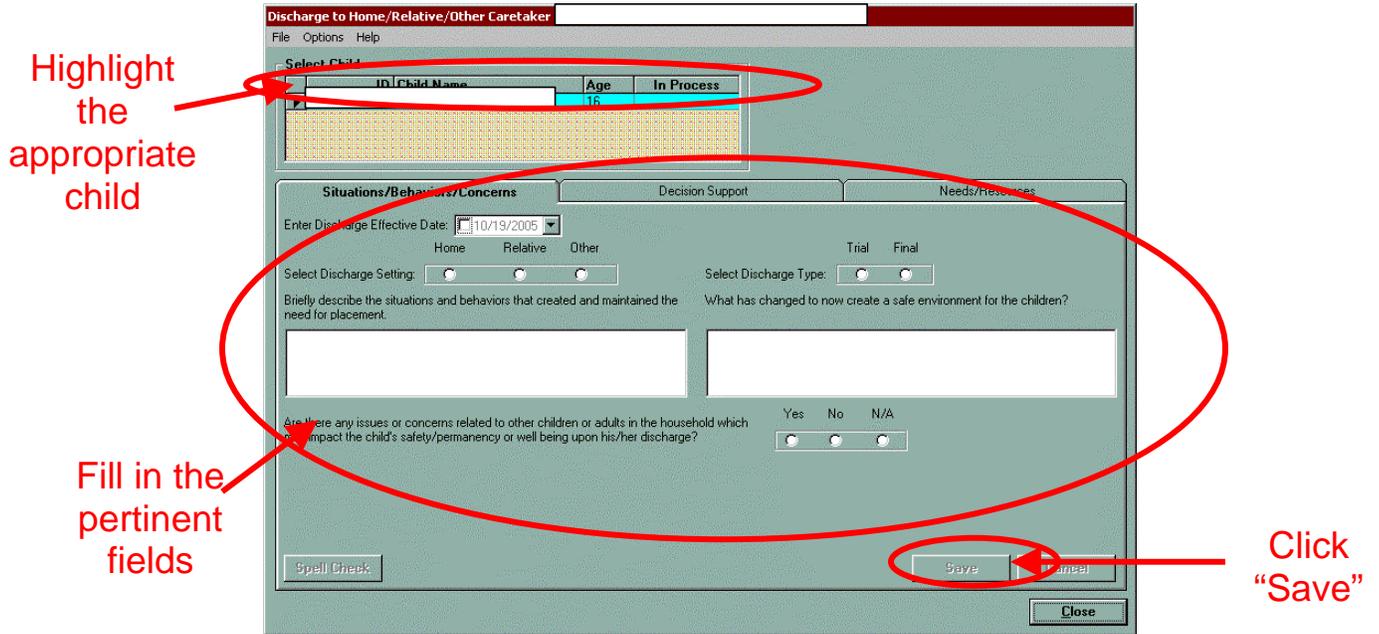
If
“Discharges”
is not found,
add the
component

The following window will open. Select “**New**” for “Home/Relative/Other Caretaker”.

Select “**New**”
adjacent to
Home/Relative
/Other
Caretaker



The “Discharge to “Home/Relative/Other Caretaker” window will open. Select the child to be discharged and document the necessary information in the appropriate windows/fields. Click the “Save” button when you’re done. Upon saving for the first time, a question will pop up saying “You are discharging <Name> to <Discharge Type>? Continue?” If you answer “No”, your changes will be unsaved. If you answer “Yes”, you cannot back out of the discharge and you must continue all of the discharge information to meet requirements for FASP completion.

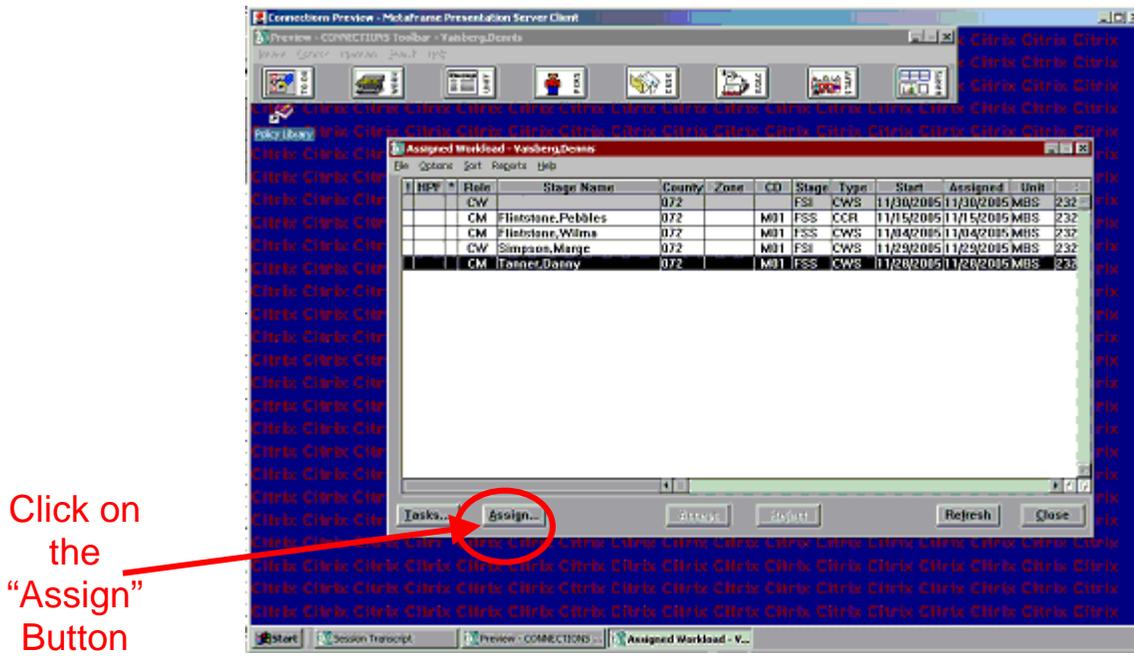


Complete the “Decision Support Tab” and the “Needs/Resources Tab”, clicking the “Save” button after finishing each.

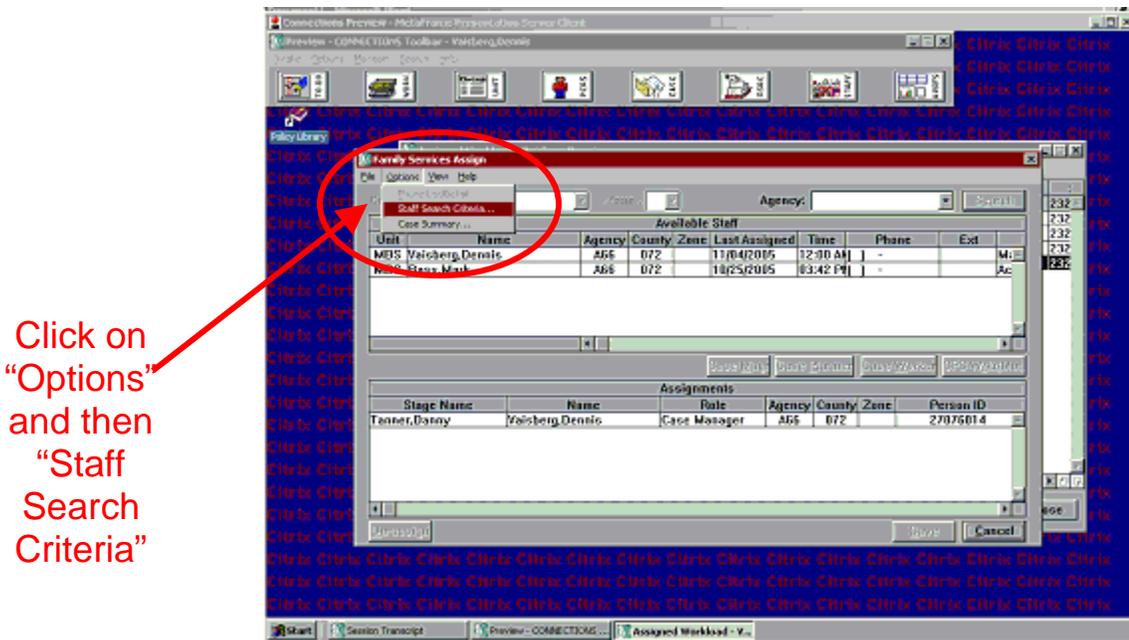
To submit the discharge request, all components of the FASP need to be completed. You can check any outstanding items required for completion by clicking on the “Check FASP Detail” button. When all items under this list are completed, the FASP can be submitted for approval.

Case Manager Reassignments

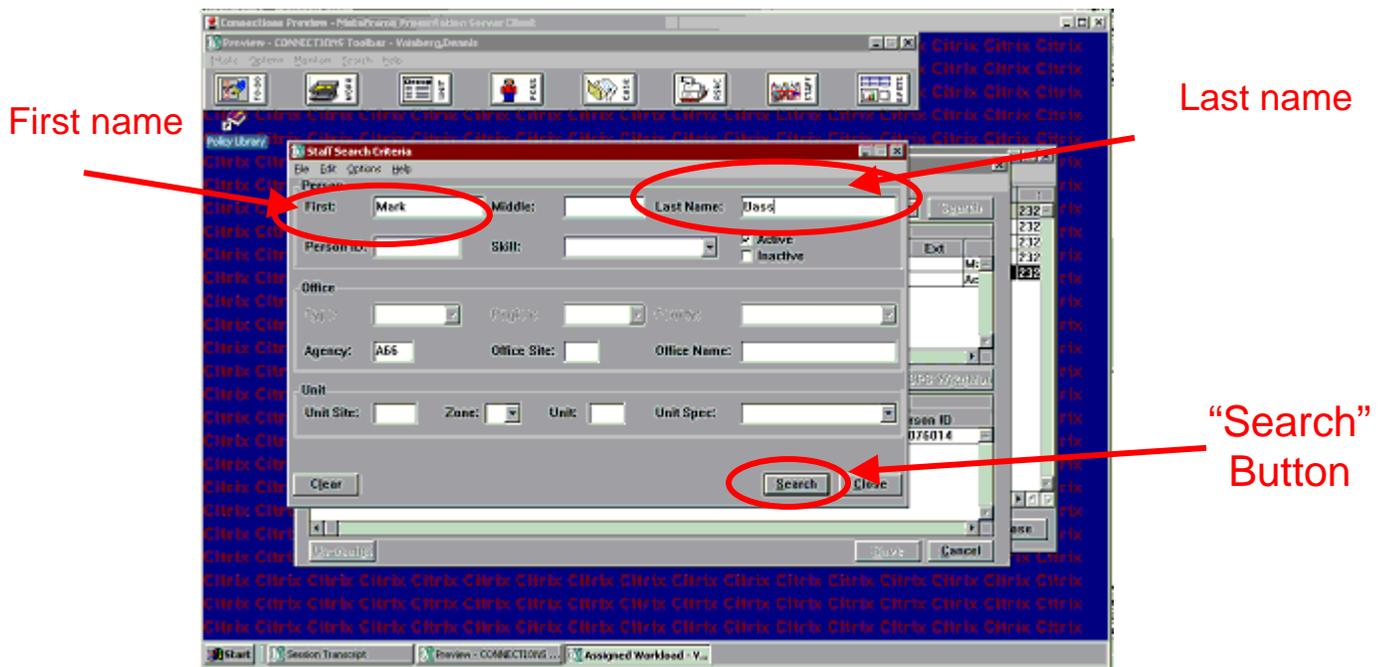
To reassign the role of Case Manager for an FSS, begin by accessing your assigned workload and highlight the appropriate case. Then click on the “Assign” button at the bottom of the screen. Only the existing Case Manager and his/her Supervisor can reassign the role of Case Manager.



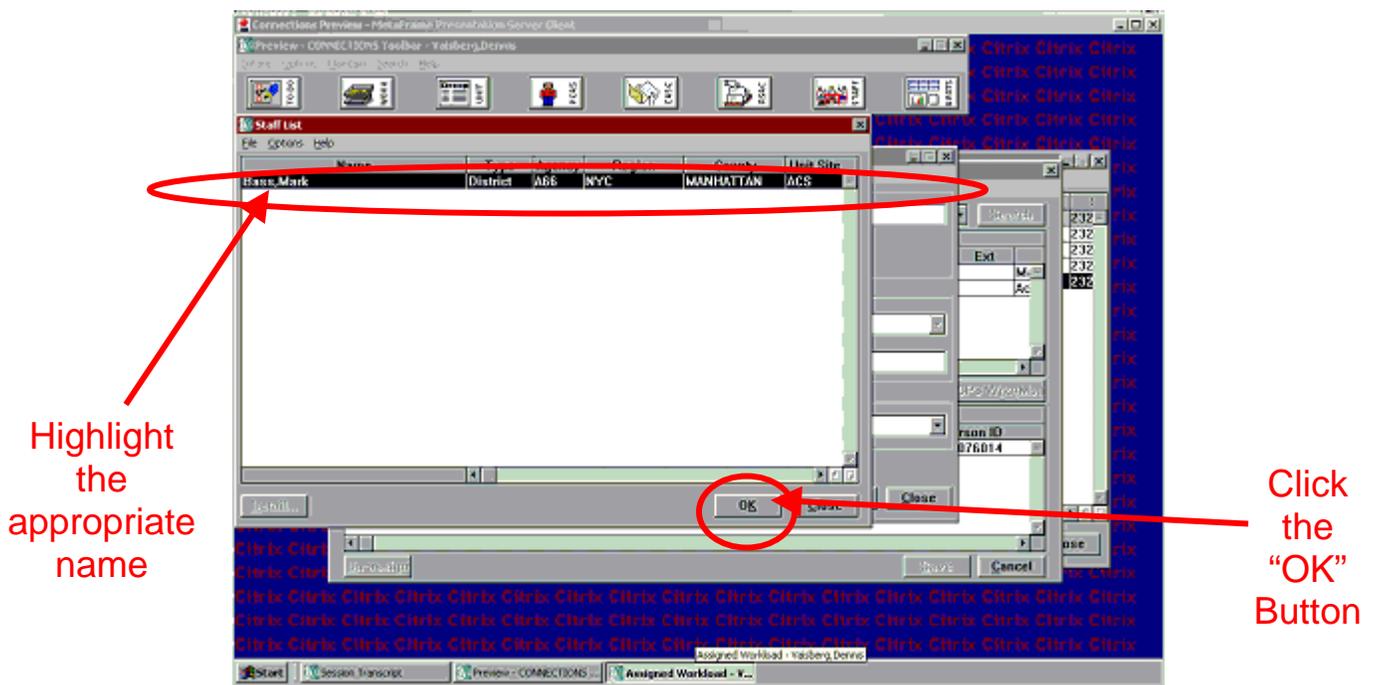
If the person you want to assign as the Case Manager appears on the list in front of you, skip the next three steps. Otherwise, click on the “Options” menu and select “Staff Search Criteria”



Type in the first and last name of the person whom you wish to assign as Case Manager, then click the “Search” button.



Highlight the appropriate name and click the “OK” button.



The selected person’s name will appear highlighted in the Family Services Assign window, and you can now designate them a number of roles in the case. To make them Case Manager, click on the “Case Manager” button. Note that if the person you wish to assign as Case Manager already has another role in the

case, you must first un-assign that role and save before assigning the Case Manager role.

The person's name is highlighted here

Click on "Case Manager" Button

Unit	Name	Agency	County	Zone	Last Assigned	Time	Phone	Ext
ACS	Bass,Mark	A66	072		11/25/2005	03:42 PM		Ac
MBS	Vaisberg,Dennis	A66	072		11/04/2005	12:00 AM		Ac
MBS	Bass,Mark	A66	072		11/25/2005	03:42 PM		Ac

Stage Name	Name	Role	Agency	County	Zone	Person ID
Tanner,Danny	Vaisberg,Dennis	Case Manager	A66	072		27076014

A message will appear, telling you "This action will remove the current Case Manager from the stage. Continue?" Click on the "Yes" button.

Answer "Yes"

Unit

Unit	Name	Agency	County	Zone	Last Assigned	Time	Phone	Ext
ACS	Bass,Mark	A66	072		11/25/2005	03:42 PM		Ac
MBS	Vaisberg,Dennis	A66	072		11/04/2005	12:00 AM		Ac
MBS	Bass,Mark	A66	072		11/25/2005	03:42 PM		Ac

Case Mngr Case Planner Case Worker CPS Wkr/Mon

Stage Name	Name	Role	Agency	County	Zone	Person ID
Tanner,Danny	Vaisberg,Dennis	Case Manager	A66	072		27076014

The new Case Manager's name will display in the assignments window. Click the "Save" button and finalize the role reassignment. The case will be removed from your workload once it's reassigned.

Preview - CONNECTIONS Toolbar - Vaisberg,Dennis

Intake Options Maintain Search Help

TO-DO WORK UNIT PERS CASE RSRC STAFF REPORTS

Family Services Assign

File Options View Help

County: MANHATTAN Zone: Agency: Search

Available Staff								
Unit	Name	Agency	County	Zone	Last Assigned	Time	Phone	Ext
ACS	Bass,Mark	A66	072	/ /		:	() -	
ACS	Kamboj,Nishakar	A66	072	/ /		:	() -	

Case Mngt Case Planner Case Works CPS Wkr/Mor

Assignments						
Stage Name	Name	Role	Agency	County	Zone	Person ID
Griffin,Lois	Bass,Mark	Case Manager	A66	072		27076013

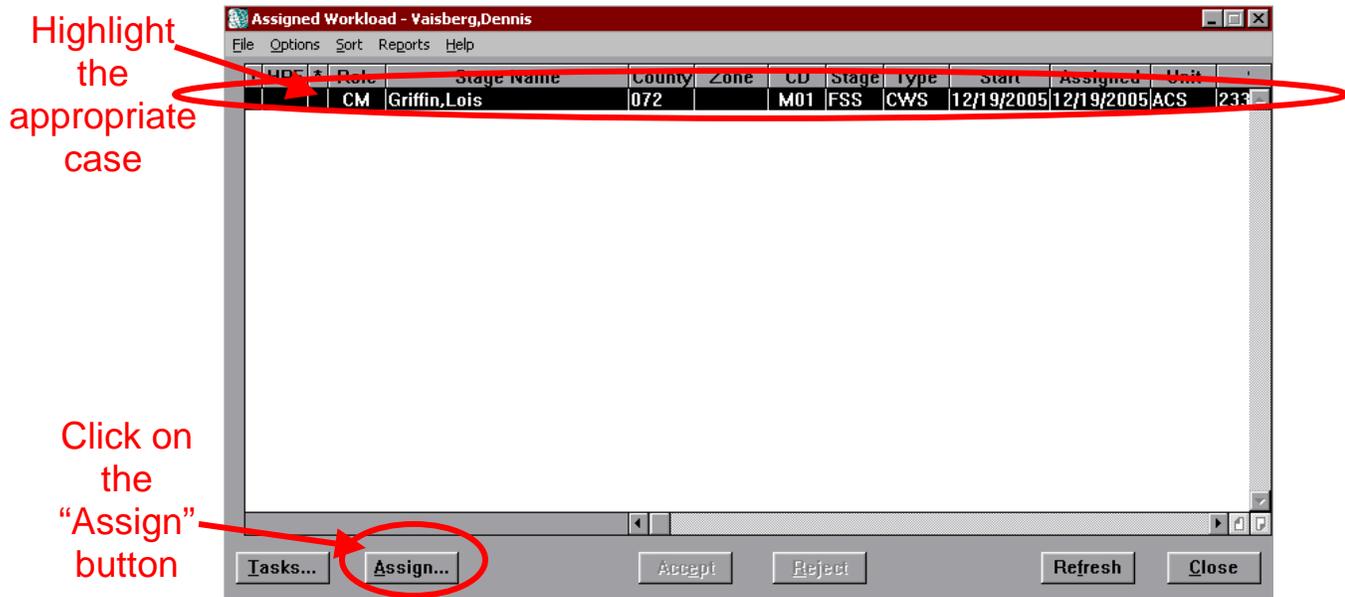
Un-assign Save Cancel

New Case Manager displayed here

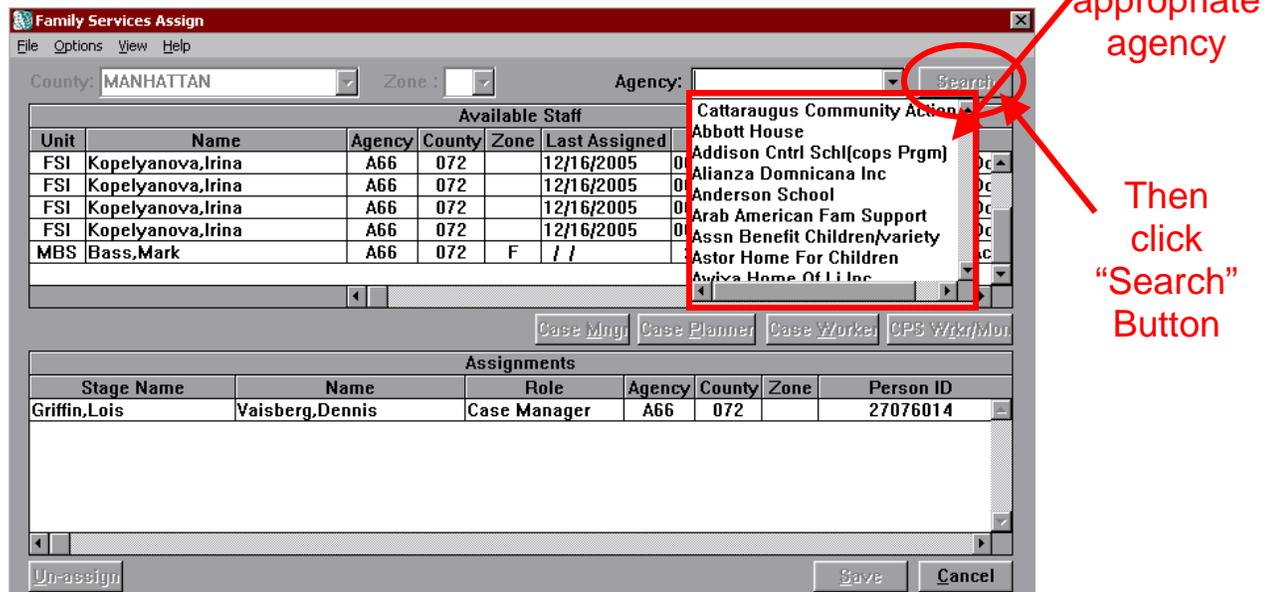
Click on the "Save" button

Assigning the Role of Case Planner to a Voluntary Agency

To assign the role of Case Planner to a Voluntary Agency, access your assigned workload, highlight the appropriate case, and click the “Assign” button.



Select the agency the Case Planner works for from the dropdown box titled “Agency”. Scroll down the alphabetical list until you find the appropriate agency, and click on it. You may have to repeat this process to truly highlight the appropriate agency. Then click on the “Search” button.



All contract agencies have set up FSS intake units to receive all incoming cases from their appropriate district. You may need to call the agency to find out which person on the list is the appropriate one to send the case to. Once you’ve done

so, select the proper individual at the agency to receive the FSS. Highlight their name and click on the “Case Planner” button.

Highlight the appropriate person at the agency

Click on the “Case Planner” button

Unit	Name	Agency	County	Zone	Last Assigned	Time	Phone	Ext	
FSS Worker [B52]	S,B18 Conv	B52	071		//	:	() -		Pi
FSS Worker [B52]	M,B18 Conv	B52	071		//	:	() -		Pi
FSS Worker [B52]	G,B18 Conv	B52	071		//	:	() -		Pi
FSS Worker [B52]	A,B18 Conv	B52	071		//	:	() -		Pi
FSS	Nabozny, Peter	B52	071		//	:	() -		Pi
FSS		B52	072		05/29/2004	12:00 AM	(212) 949-4800	4967	Ch

Stage Name	Name	Role	Agency	County	Zone	Person ID
Griffin,Lois	Vaisberg,Dennis	Case Manager	A66	072		27076014

Once you’ve clicked the “Save” button, the agency will be able to reassign the role of Case Planner within their agency (if desired) and also assign Caseworker roles.

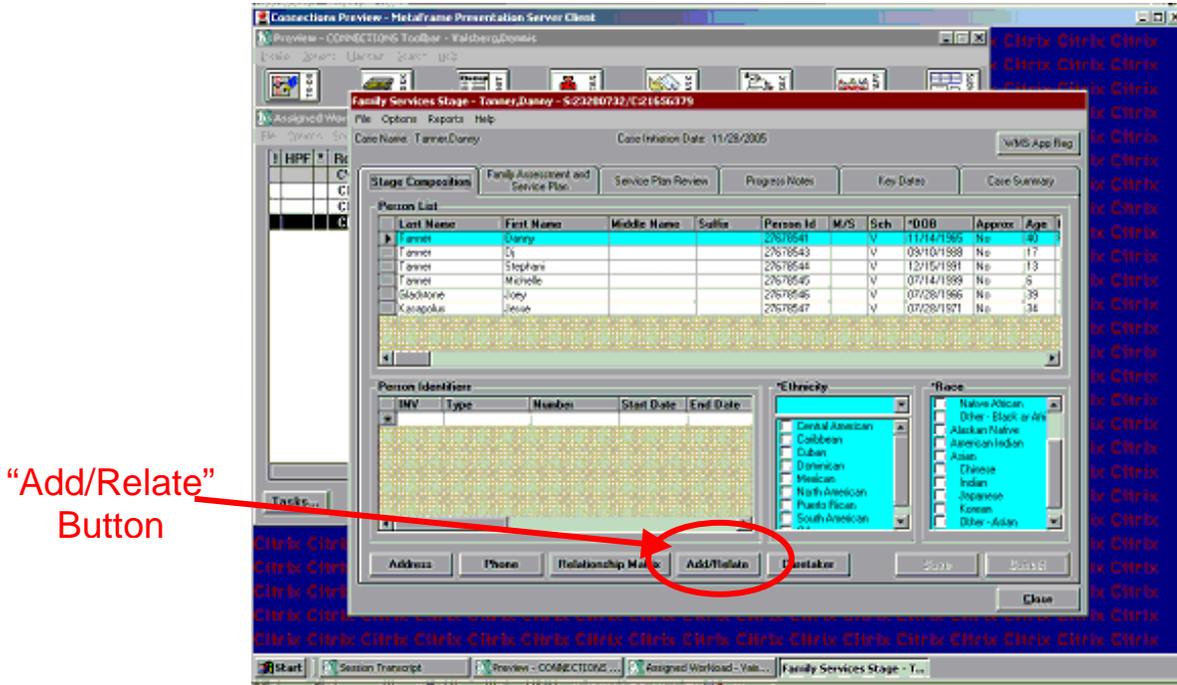
Click “Save”

Unit	Name	Agency	County	Zone	Last Assigned	Time	Phone	Ext	
FSS Worker ()	S,B18 Conv		071		//	:	() -		Pi
FSS Worker ()	M,B18 Conv		071		//	:	() -		Pi
FSS Worker ()	G,B18 Conv		071		//	:	() -		Pi
FSS Worker ()	A,B18 Conv		071		//	:	() -		Pi
FSS			071		//	:	() -		Pi
FSS			072		05/29/2004	12:00 AM	(212) 949-4800	4967	Ch

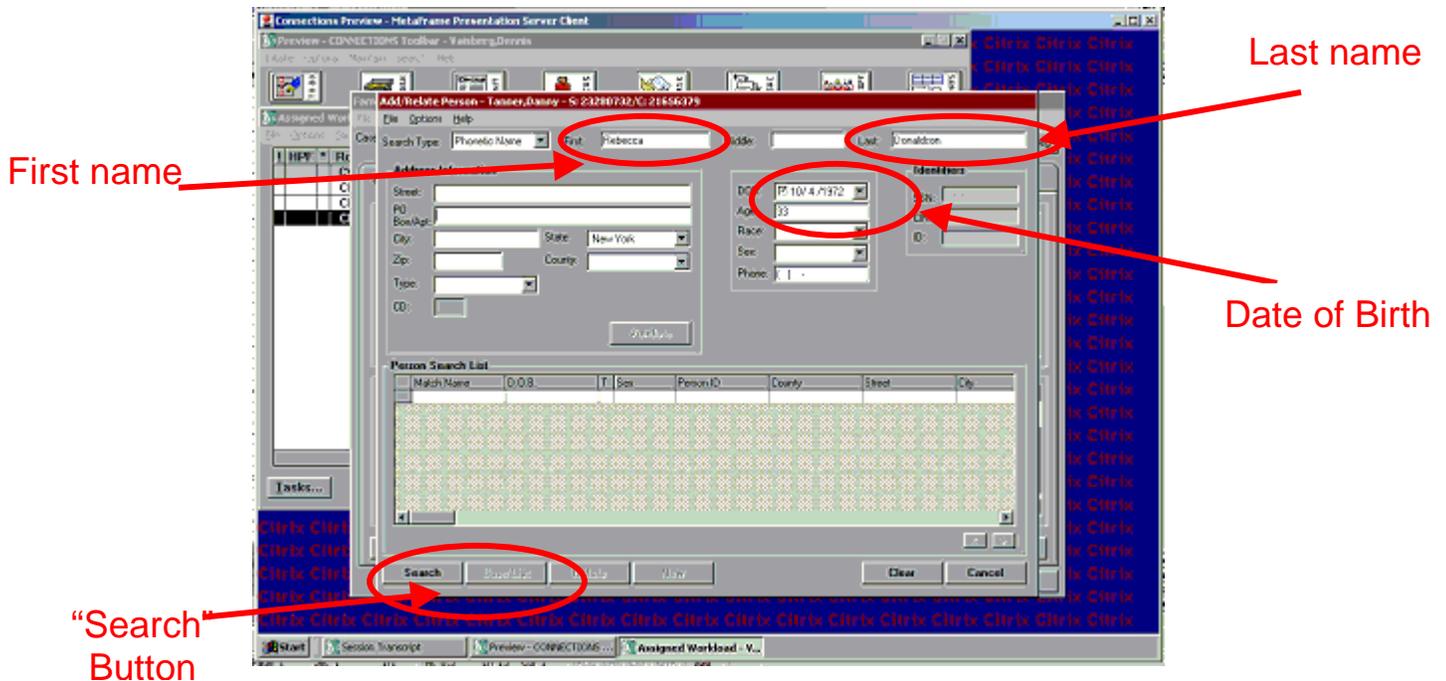
Stage Name	Name	Role	Agency	County	Zone	Person ID
Griffin,Lois	Vaisberg,Dennis	Case Manager	A66	072		27076014
Griffin,Lois	Nabozny, Peter	Case Planner		071		27244309

Adding a Person to an FSS

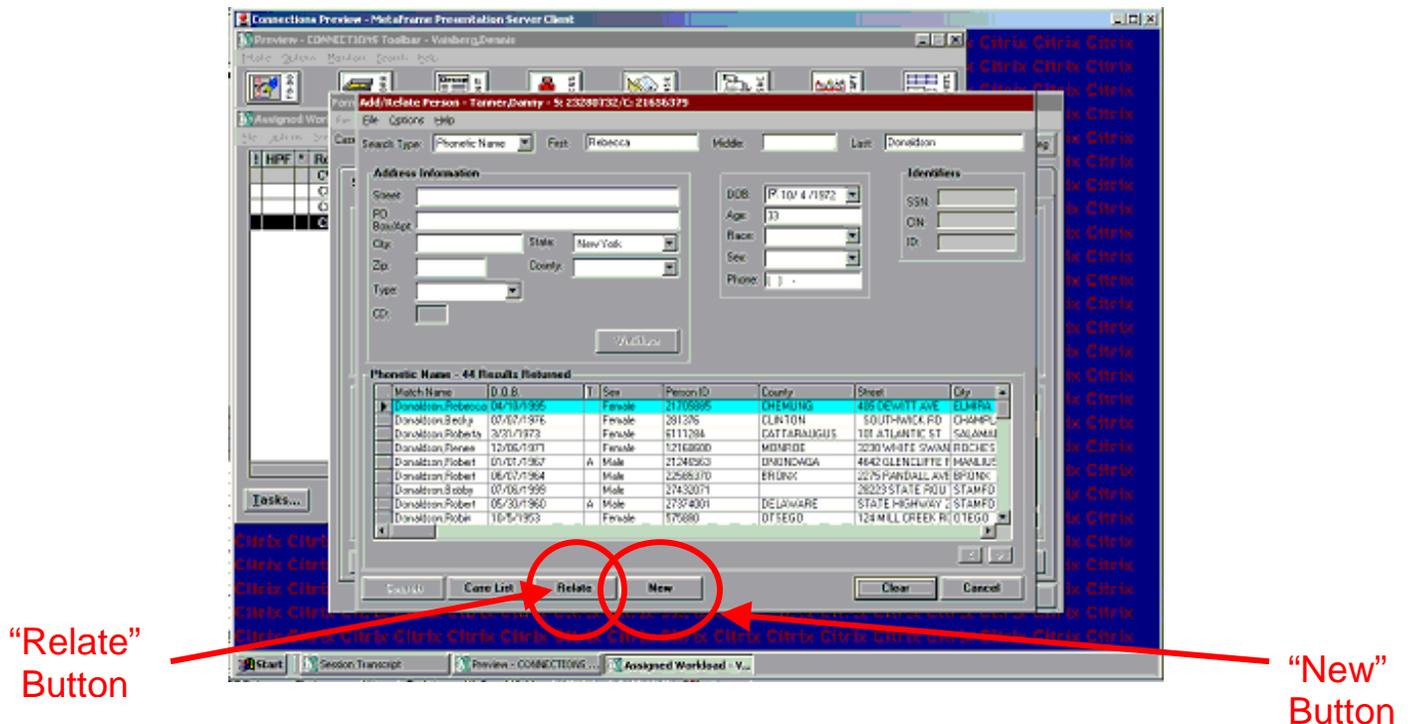
To add a person to a CONNECTIONS case, start by going to your assigned workload, highlight the appropriate case, and click on the “Tasks” button. Then, in the Stage Composition window, click on the “Add/Relate” button.



Enter the first and last name of the person you wish to add to the case. If the name is common, you may also want to enter the birth date of the person you are adding to the case. Click on the “Search” button.



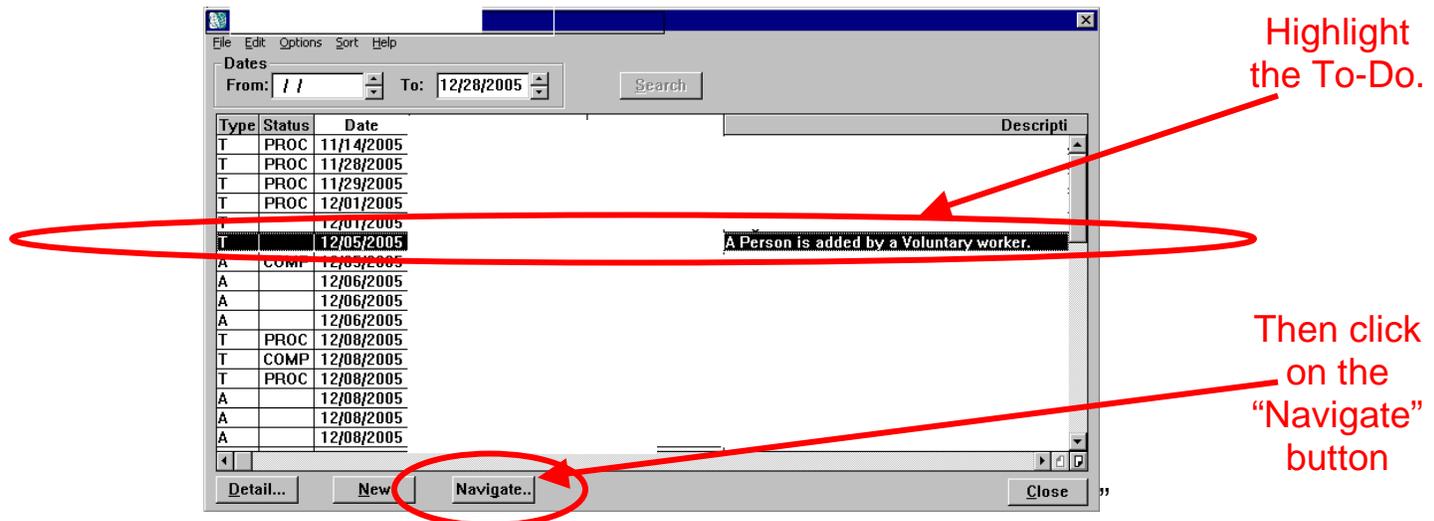
A list will appear with a number of names, birthdates and other information resembling the information you entered for the person you wish to add. If there is a match, highlight the matching person and click on the “Relate” button. If there is no match, click on the “New” button.



If you selected “Relate”, you may have to fill in any required information in the proper fields and then save your work. Or, all information may be complete, and it will automatically add the person to the Stage Composition. If that is the case, skip to the bottom screen shot on this page. If you selected “New”, continue by entering all of the information you have on the person in the next screen. When you’re done, click on the “Save” button.

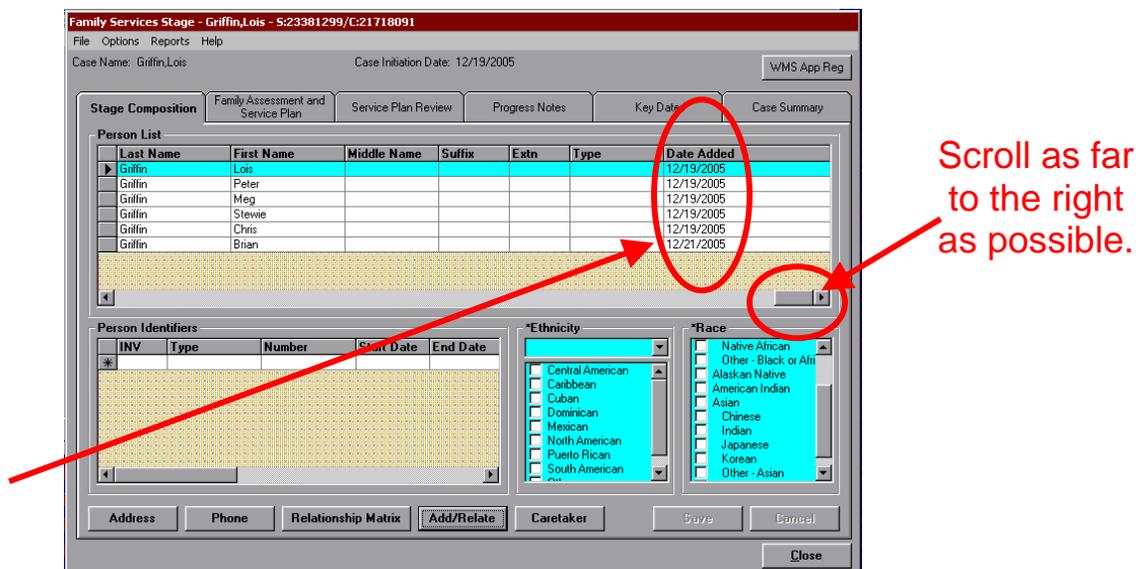
Case Manager Task After Voluntary Agency Worker Adds a Person to an FSS

When a worker at a Voluntary Agency adds a person to an FSS, the system generates a To-Do sent to the Case Manager that states, "A Person is added by a Voluntary Worker." Highlight that To-Do and click on the "Navigate" button.



The "Navigate" button brings you to the Stage Composition tab of the FSS. From here, you need to determine who has been added to the stage. There are two ways to do so. One way is to look at the WMS 2970 authorization form, and figure out who is in the FSS but not found on the printout. The other way is to look at the date a person was added to the FSS and compare it to the date the To-Do was generated. To discover when someone was added to the FSS, scroll to the far right of the person list and view the date each person was added.

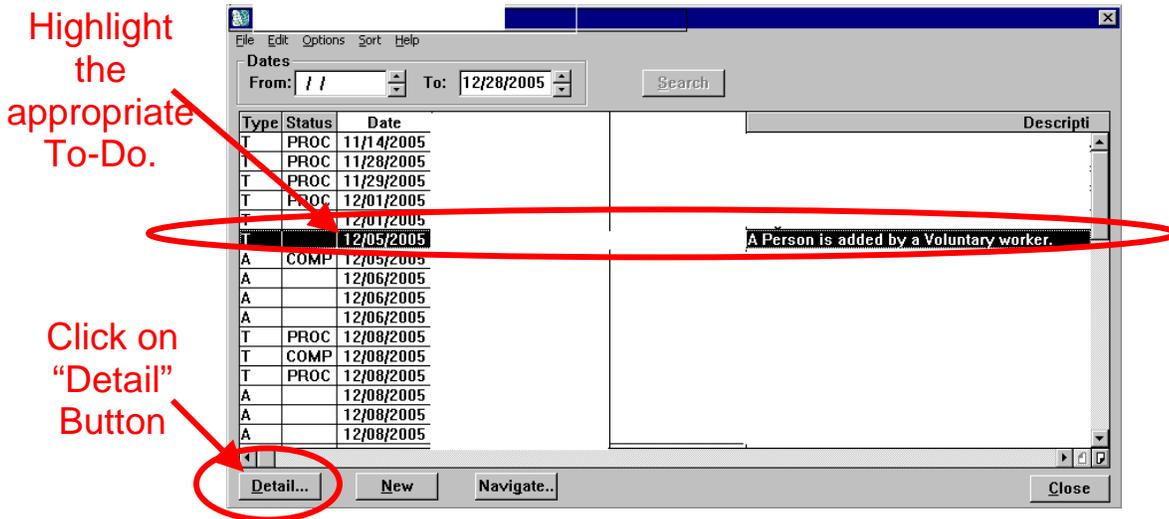
Which one of these was recently added or has a date added which matches the To-Do you navigated from?



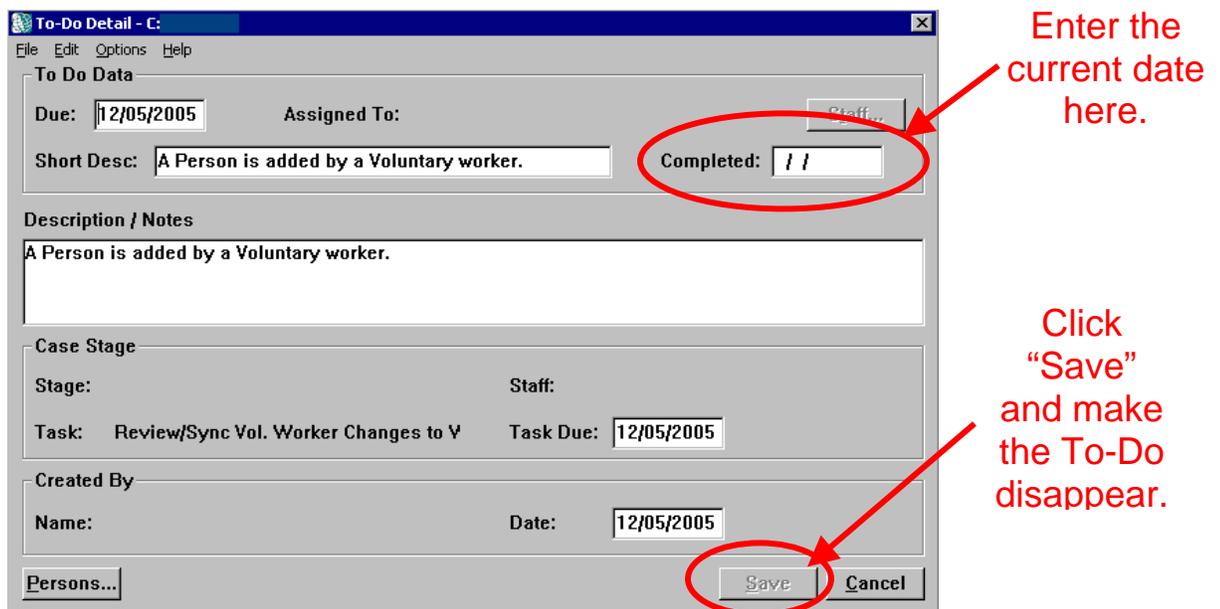
You now need to submit paperwork to the WMS Data Entry unit to complete the process of adding a person to a case. Write in their name, gender, social

security number and date of birth on the WMS 2970 form. You also need to enter their eligibility category and add any POS lines (if necessary). You may need to contact the Case Planner to receive the necessary information and documentation to add the person to WMS. Note: If you believe the addition of the person to the FSS was inappropriate, refer to the “End Dating an Individual from an FSS” section in this document, and follow those instructions for end dating the individual.

Once you’ve received the WMS 2970 form back from the WMS Data Entry unit with the relevant person added, you can mark the To-Do as completed and this will remove it from your To-Do list. Since it is a task (T) type To-Do, you can’t simply delete it. Go back to your To-Do list, highlight the To-Do, and click on the “Detail” Button.



Input the current date in the ‘Completed’ date section and then click “Save”. The To-Do will be removed from your To-Do list.



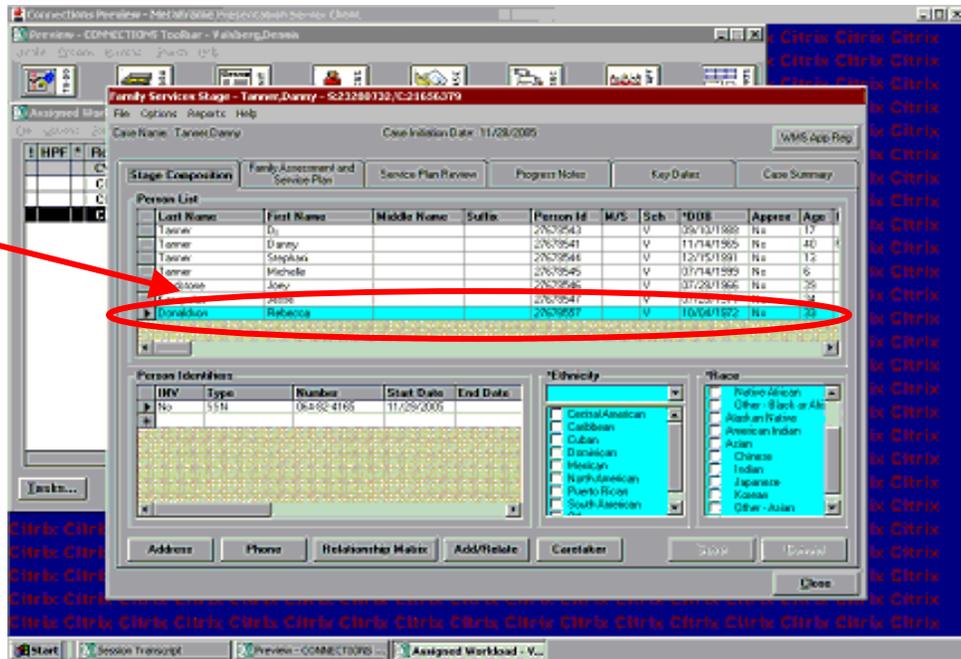
End Dating a Person from an FSS

To end date an individual found in an FSS, you must first go to your assigned workload, highlight the appropriate case, and click the “Tasks” button. That will bring you to the Stage Composition screen. If the person you want to end date is the applicant/payee (01) on the WMS 2970 authorization form, you’ll need to speak to your WMS Data Entry worker and have them make another member of the household the applicant/payee before continuing. WMS does not permit the end dating of the applicant/payee under any circumstances.

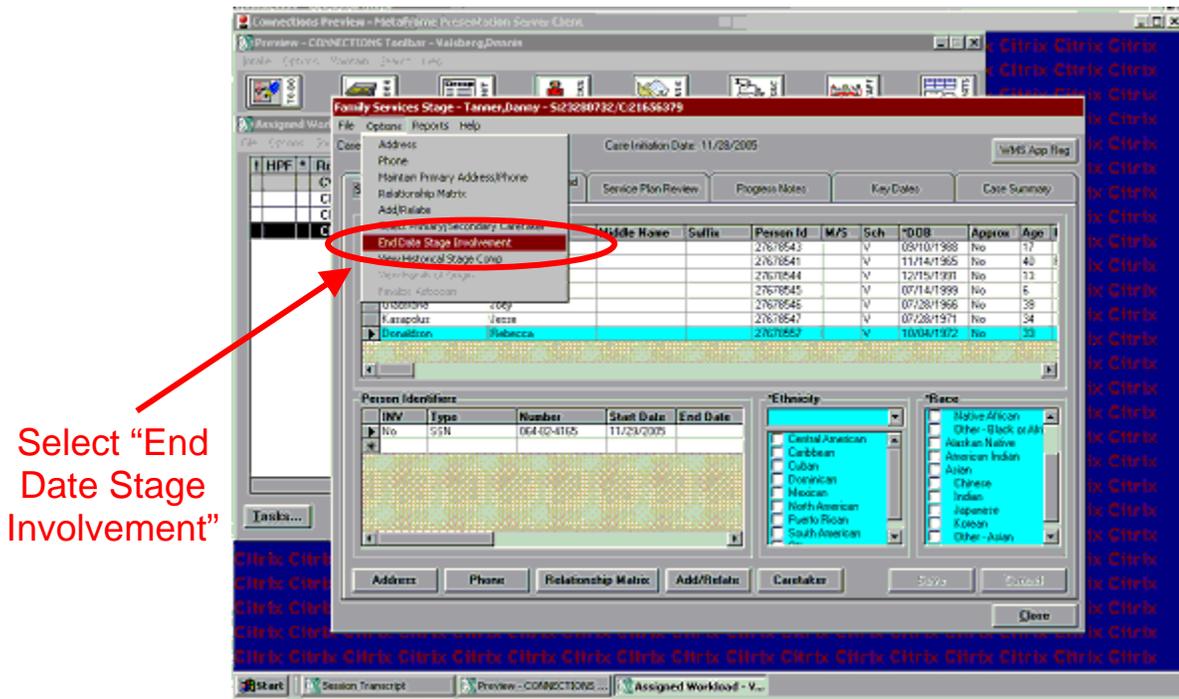


Highlight the person you want to end date.

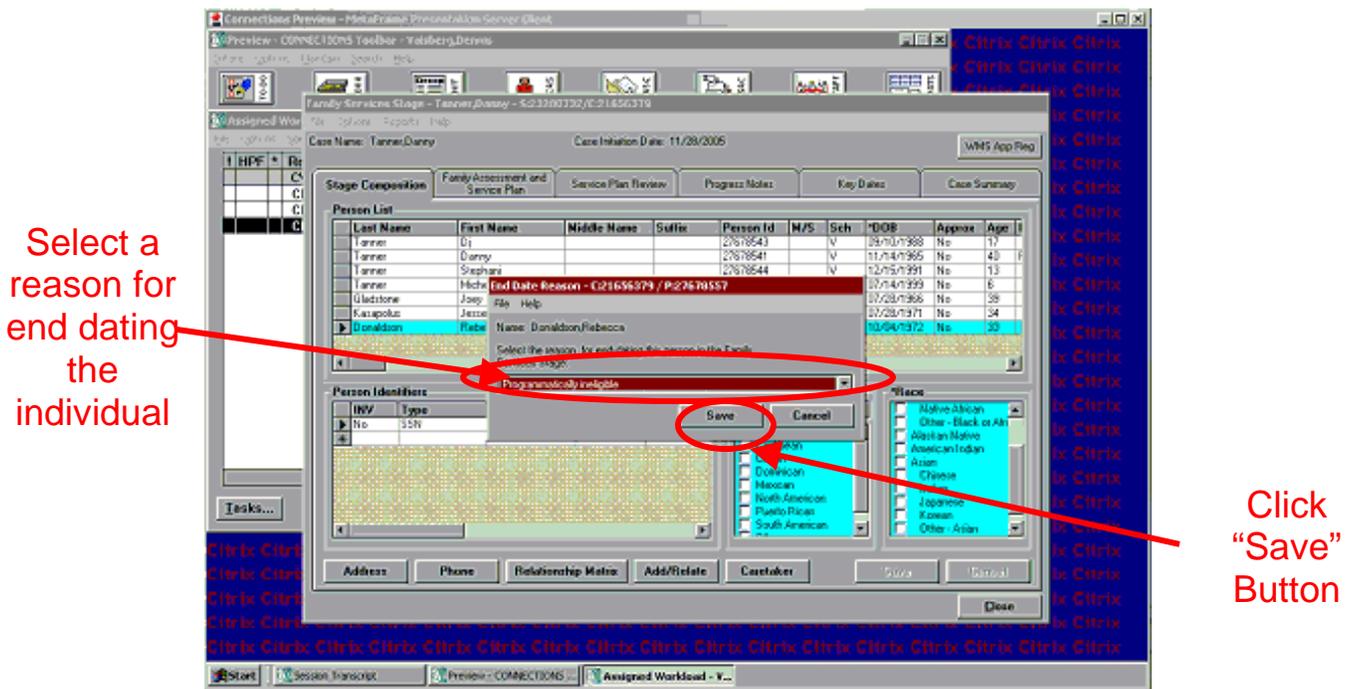
Highlight the person that needs to be end dated



Click on the “Options” menu and select “End Date Stage Involvement”.

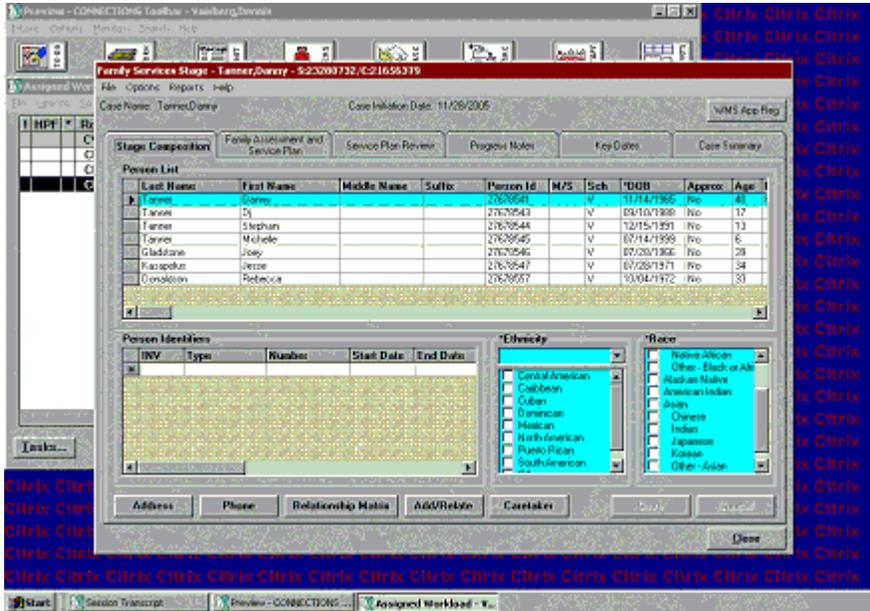


A pop-up will appear with a heading of “End Date Reason”. There will be a dropdown menu that gives you a number of different options for end dating the individual. Select the one that is most appropriate to the situation and click the “Save” button.

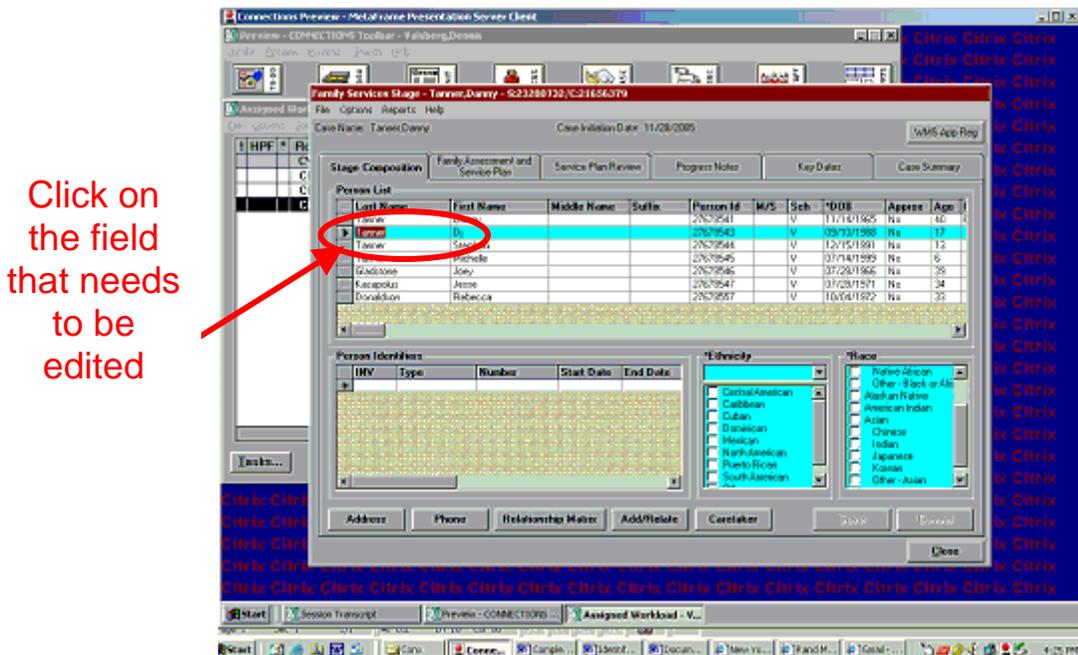


Changing Demographic Information in an FSS

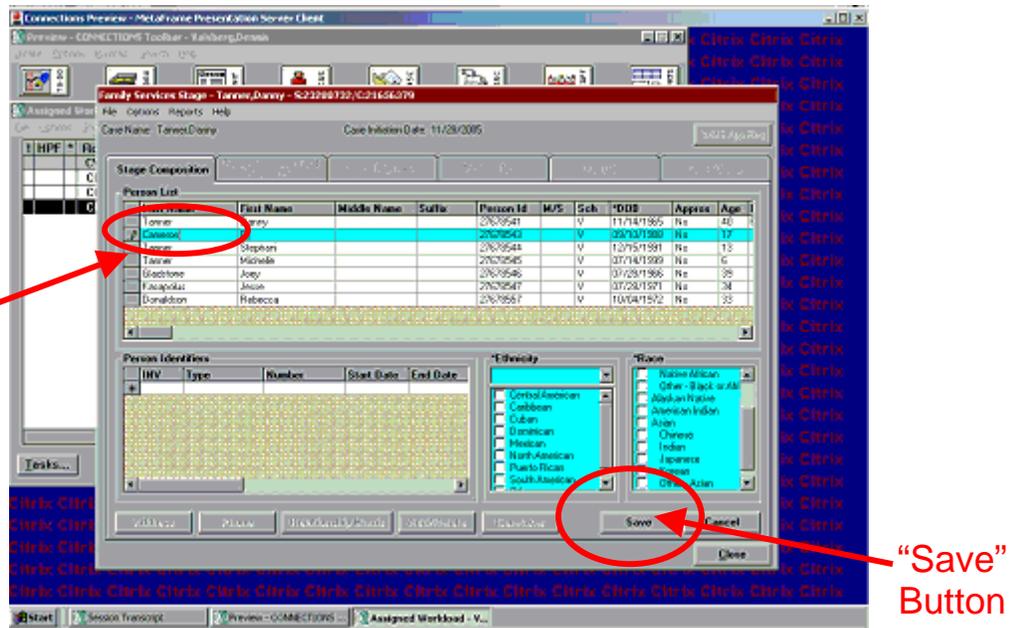
To make a demographic change in a CONNECTIONS FSS, start by clicking on your assigned workload, highlight the case a change needs to be made in, and click on the “Tasks” button. That will bring you to the Stage Composition screen.



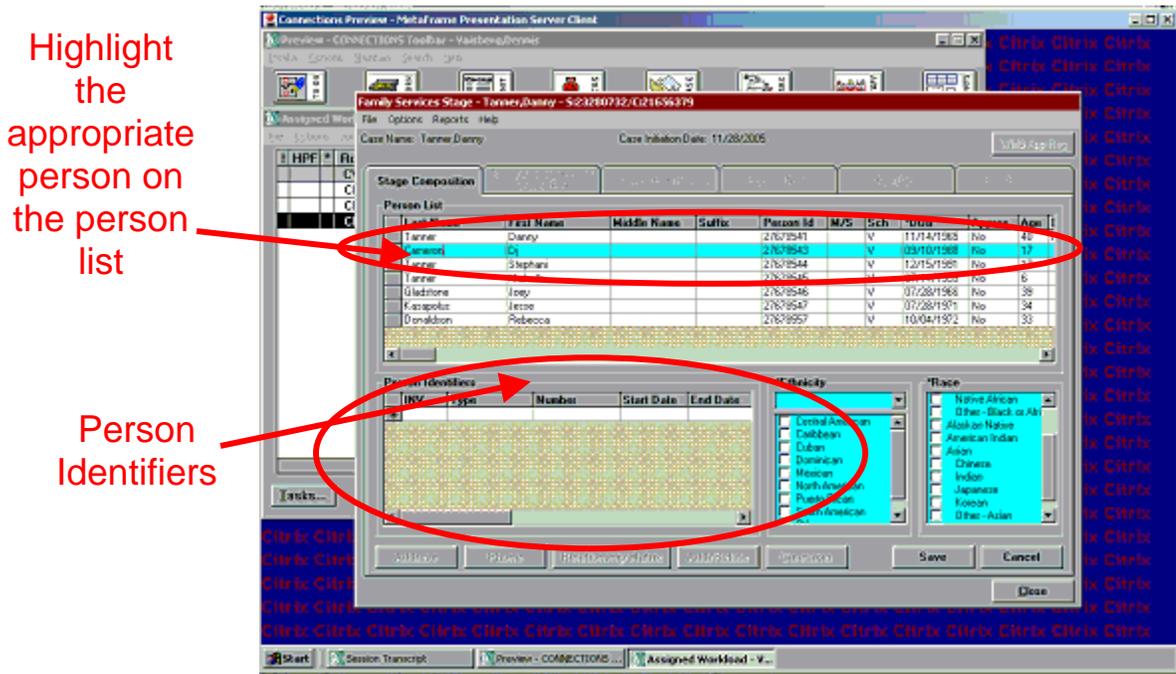
On the Person List, click on the specific piece of demographic information you wish to change (or add).



Type the new information into the field you have just highlighted and click the “Save” button.

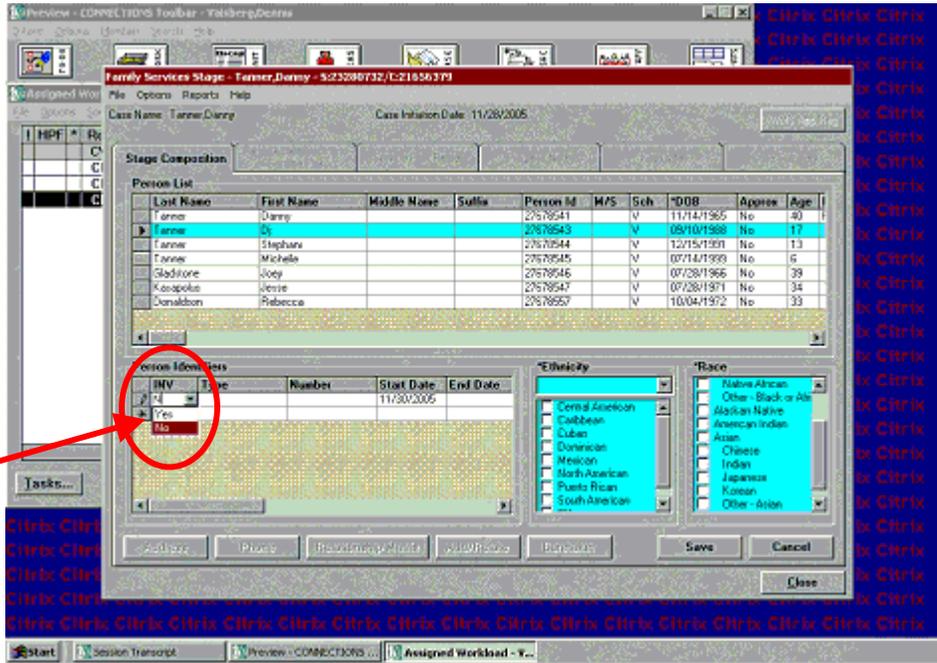


If the information you wish to change or add is the person's Social Security Number, you need to work in the bottom left hand grid, which is called "Person Identifiers". Begin by highlighting the person for whom you want to add a SSN.



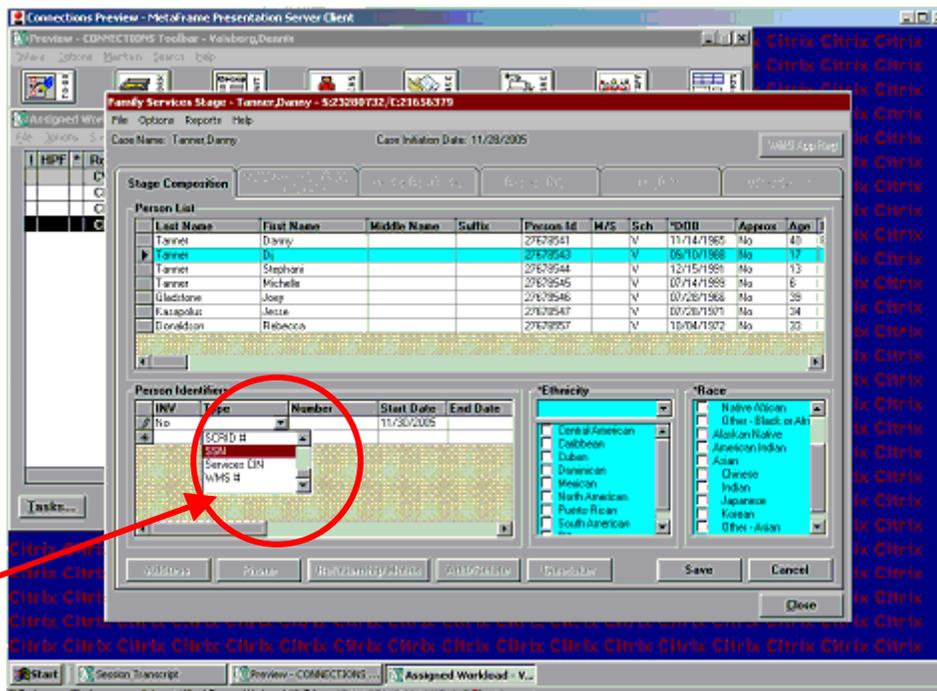
Begin by clicking on the white box below the heading "INV", which stands for invalid. Select the option "No", because this identifier is not invalid.

Click on dropdown and select "No"

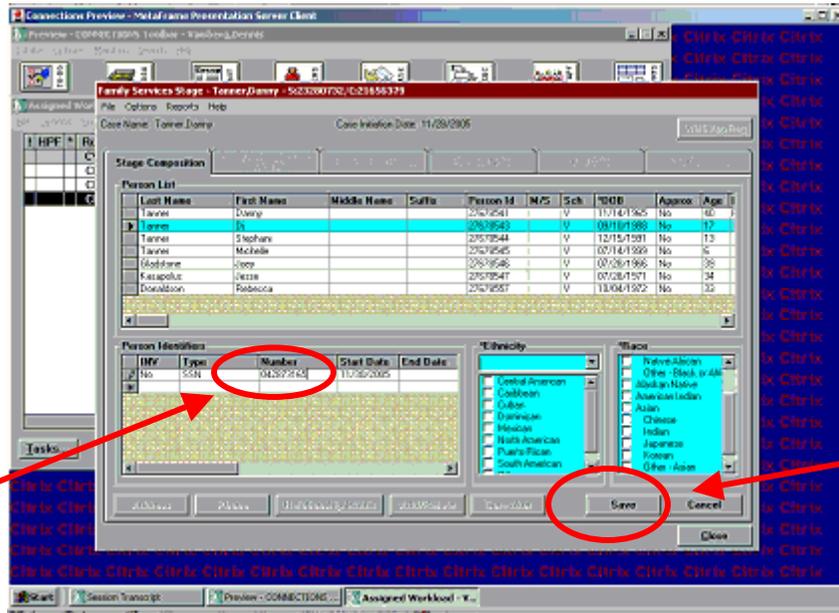


Click on the white box directly adjacent to the "No" box, which has the heading of "Type". In the dropdown, select "SSN" (you will have to scroll down a bit).

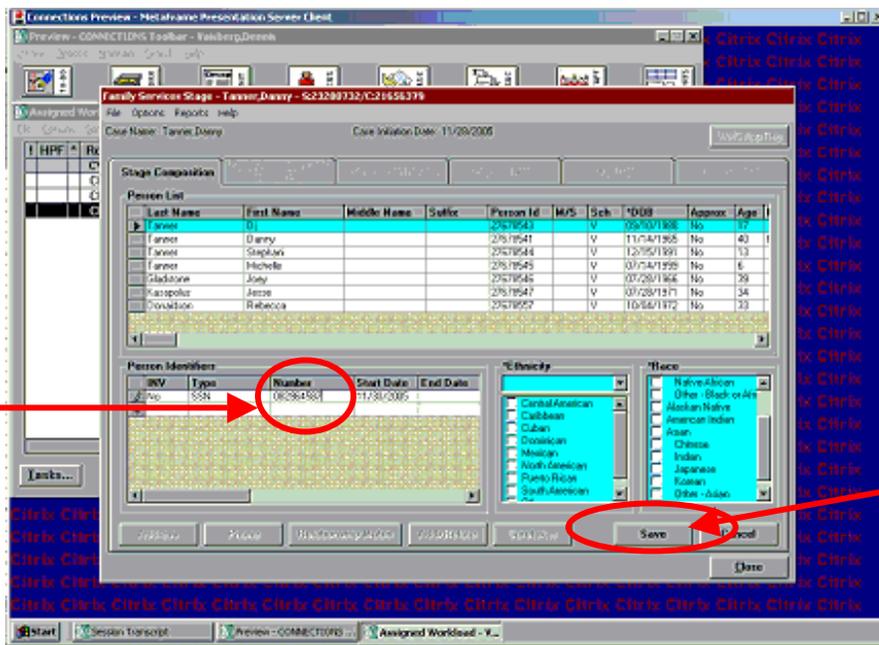
Select "SSN" as the person identifier type.



In the next box to the right, called "Number", type in the nine-digit Social Security Number of the client and click the "Save" button in the bottom right corner.



To change the Social Security Number that has already been entered into CONNECTIONS, click on the 9-digit number in the person identifiers, delete it, and type in the correct number. Then click the "Save" button.



Changing the Primary Address and Phone Number

To change the primary address and/or phone number of a person in a Family Services Stage, begin by accessing your assigned workload, highlight the appropriate stage and click the “Tasks” button. In the Stage Composition window, click on Options, and then select “Maintain Primary Address/Phone”.

The screenshot shows the 'Family Services Stage - Griffin, Lois - 5:23381299/C:21718091' window. The 'Options' menu is open, and 'Maintain Primary Address/Phone' is highlighted. A red arrow points to this option with the text 'Select Maintain Primary Address/Phone'. The window also displays a table of person information and various tabs like 'Address', 'Phone', and 'Relationship Matrix'.

Middle Name	Suffix	Person Id	M/S	Sch	*DOB	Approx	Age
		27893621		V	12/19/1971	No	34
		27893623		V	06/13/1973	No	32
		27893624		V	06/26/1988	No	17
		27893625		V	07/19/2004	No	1
		27893626		V	04/13/1991	No	14

First enter the new primary phone information (if needed), remembering to enter the type. Then type in the new street address, apartment (if appropriate), city, and address type. Then click the “Validate” button. A pop-up will appear, filling in the remaining parts of the address based on a MapInfo address validation process. If the validated address is correct, click the “Accept” button and the validated address will populate. If the address is incorrect, click the “Reject” button and the information you entered will remain as is.

1) Enter the number and type

2) Fill in the Street, City, and Address Type

3) Click the "Validate" button

Name	Role	Rel	Type	Street 1	PO Box/Apt	City	St
Griffin,Lois	Services Recipient	Mother	BS	150 WILLIAM ST		NEW YORK	NY
Griffin,Peter	Services Recipient	Parent	BS	150 WILLIAM ST		NEW YORK	NY
Griffin,Meg	Services Recipient	Child	BS	150 WILLIAM ST		NEW YORK	NY
Griffin,Stewie	Services Recipient	Child	BS	150 WILLIAM ST		NEW YORK	NY
Griffin,Chris	Services Recipient	Child	BS	150 WILLIAM ST		NEW YORK	NY

Click the "Accept" button if the information on the right is correct.

Original Address		Validated Address	
Street:	80 MAIDEN LANE	Street:	80 MAIDEN LN
PO Box/Apt:		PO Box/Apt:	
City:	NEW YORK	City:	NEW YORK
State:	NY	State:	NY
Zip:		Zip:	10038-4811
County:		County:	NEW YORK
CD:		CD:	01

Highlight each person whose address and phone number has changed by clicking on the small box to the left of his or her name. To select multiple people, hold down the control button the keyboard when you click to the left of their names. Then click the "Save" button to change their primary address.

Maintain Primary Address and Phone - Griffin,Lois - S:23381299/C:21718091

File Options Copy Help

Primary Address Information

Street:

PO Box/Apt:

City: State:

Zip: County: CD: 01

Type:

Primary Phone Information

Number:

Extension:

Type:

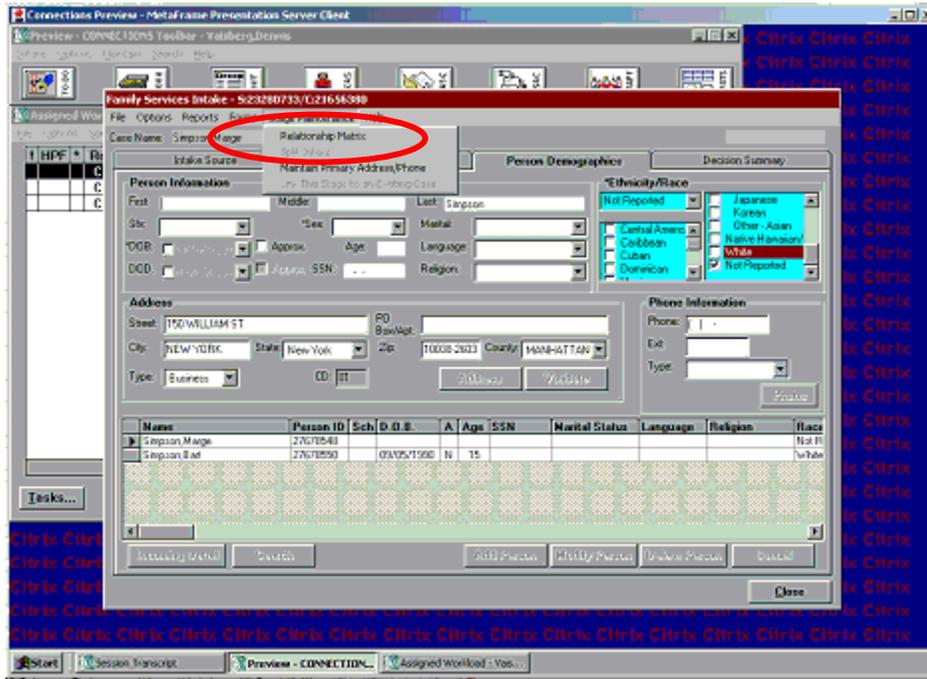
	Name	Role	Rel	Type	Street 1	PO Box/Apt	City	St
<input type="checkbox"/>	Griffin,Lois	Services Recipient	Mother	BS	150 WILLIAM ST		NEW YORK	NY
<input type="checkbox"/>	Griffin,Peter	Services Recipient	Parent	BS	150 WILLIAM ST		NEW YORK	NY
<input checked="" type="checkbox"/>	Griffin,Meg	Services Recipient	Child	BS	150 WILLIAM ST		NEW YORK	NY
<input type="checkbox"/>	Griffin,Stewie	Services Recipient	Child	BS	150 WILLIAM ST		NEW YORK	NY
<input type="checkbox"/>	Griffin,Chris	Services Recipient	Child	BS	150 WILLIAM ST		NEW YORK	NY

Click on the box next to the appropriate person's name. Hold the 'control' button to highlight multiple people.

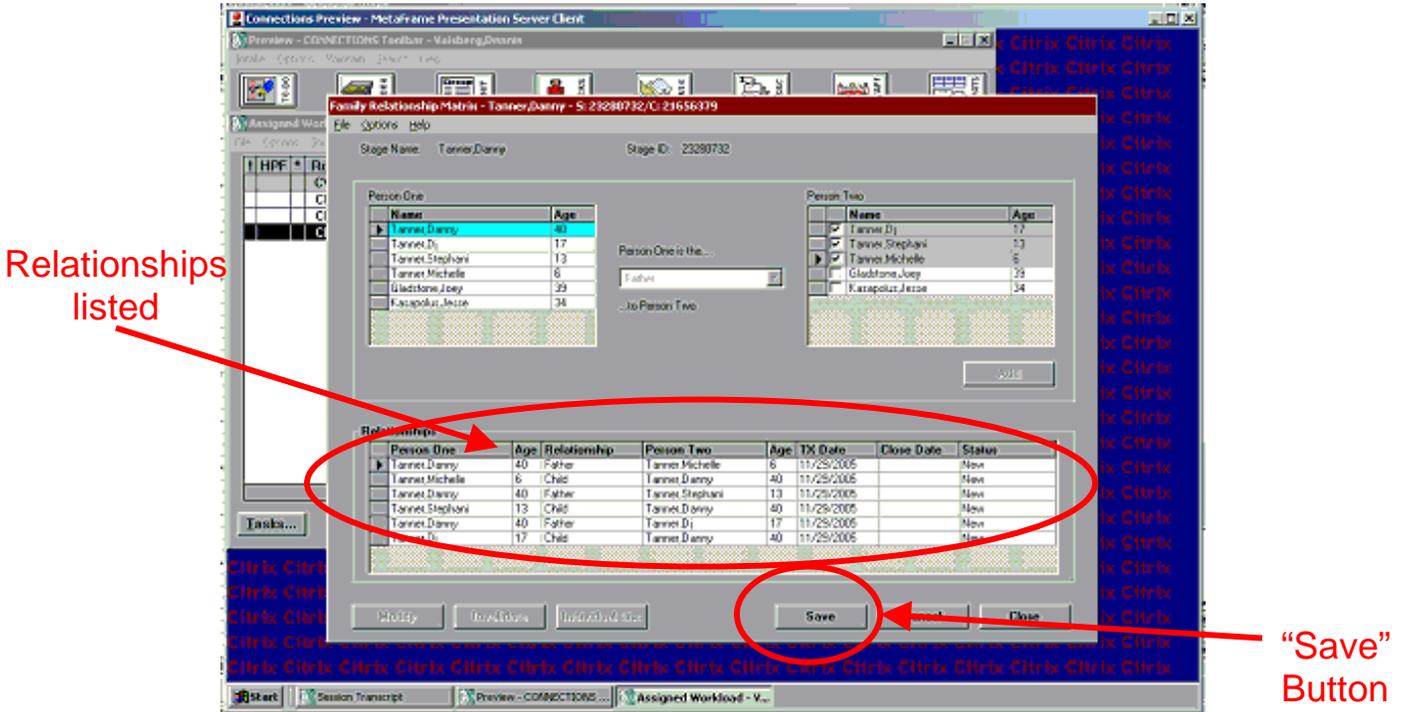
Then click the "Save" button.

Completing the Relationship Matrix

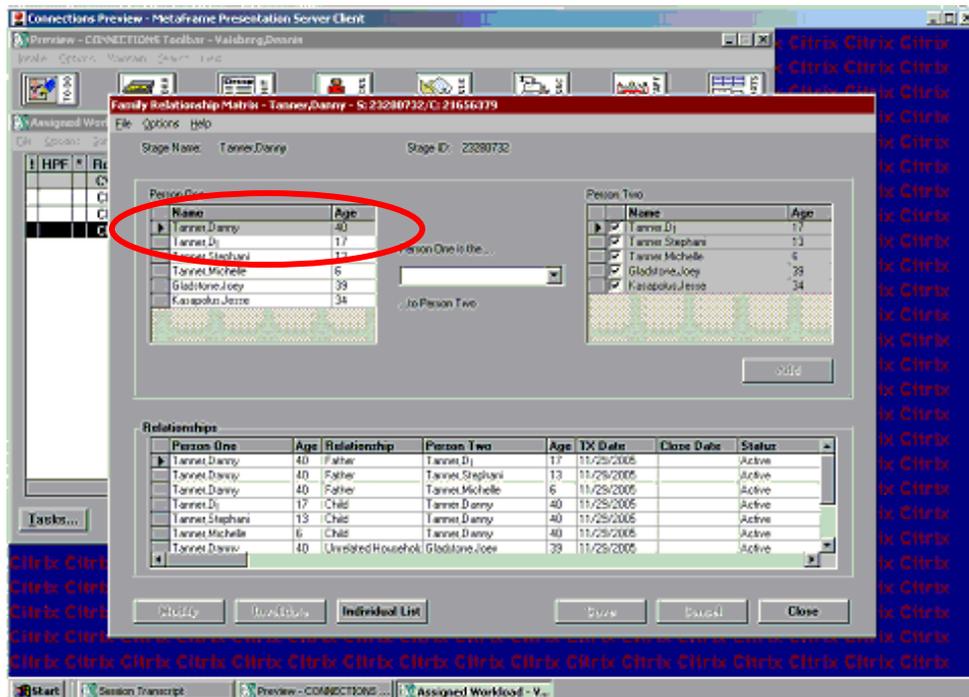
The Relationship Matrix can be completed in either an FSI or FSS stage. To access the Relationship Matrix in the FSI; highlight the case in your assigned workload, click on the “Tasks” button, click on the Person Demographics tab, click on “Stage Maintenance” at the top of the FSI and then select “Relationship Matrix”.



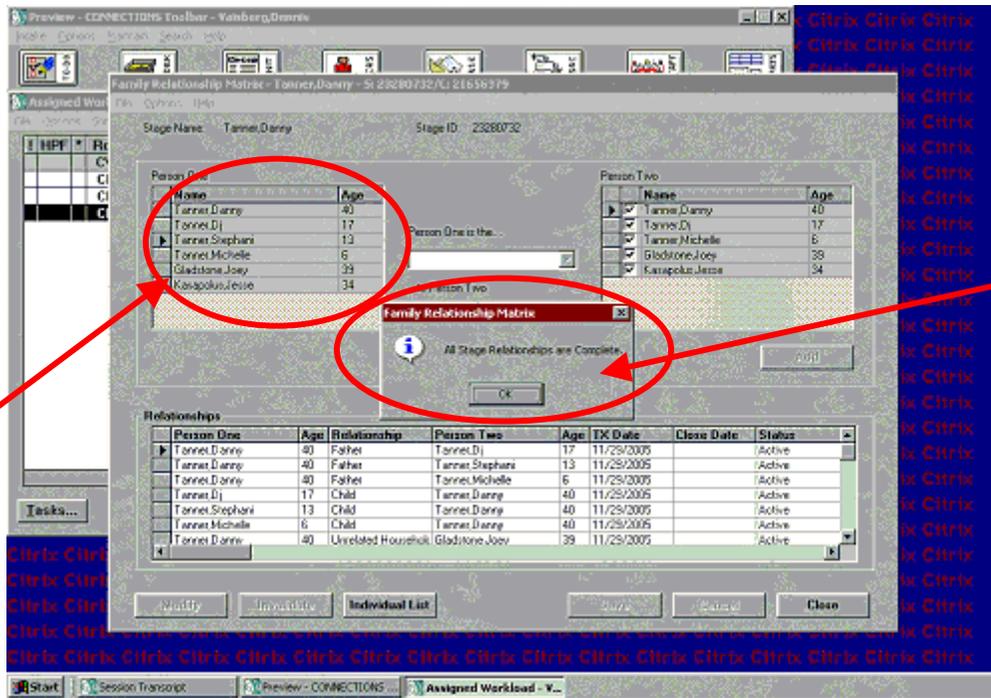
To access the Relationship Matrix within the FSS, highlight the case in your assigned workload, click on the “Tasks” button, and click on the “Relationship Matrix” button at the bottom of the screen.



Continue by filling out Person One's relationships with the other people found in the Stage Composition. When that person's relationships have been completely defined, the person's name in the left column will become grayed out.



Follow the same procedure for every other member of the Case Composition. When you have finished, all names will be grey on the left side column, and a pop-up will appear reading, "All Stage Relationships are Complete." Click on the "OK" button.

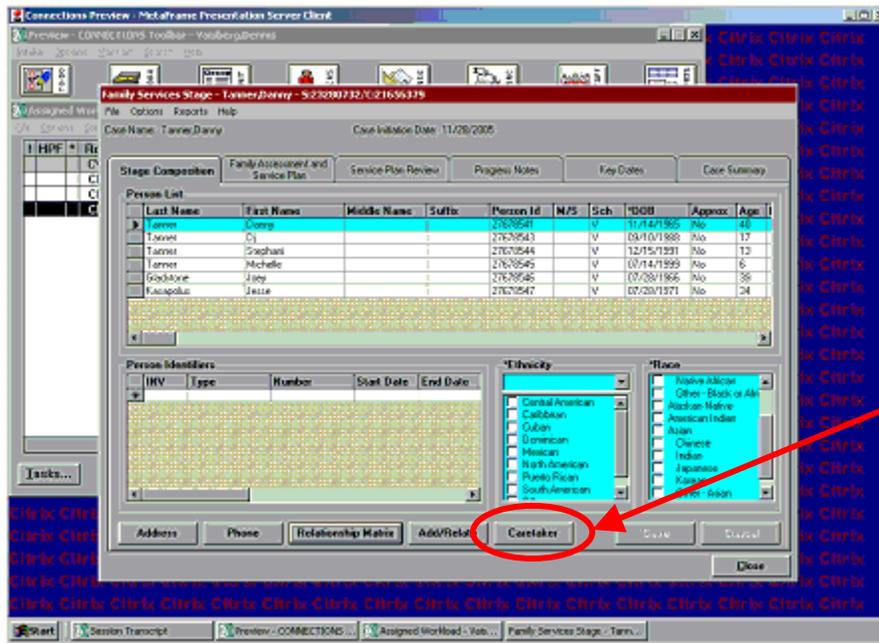


Entirely grey, this means you're done

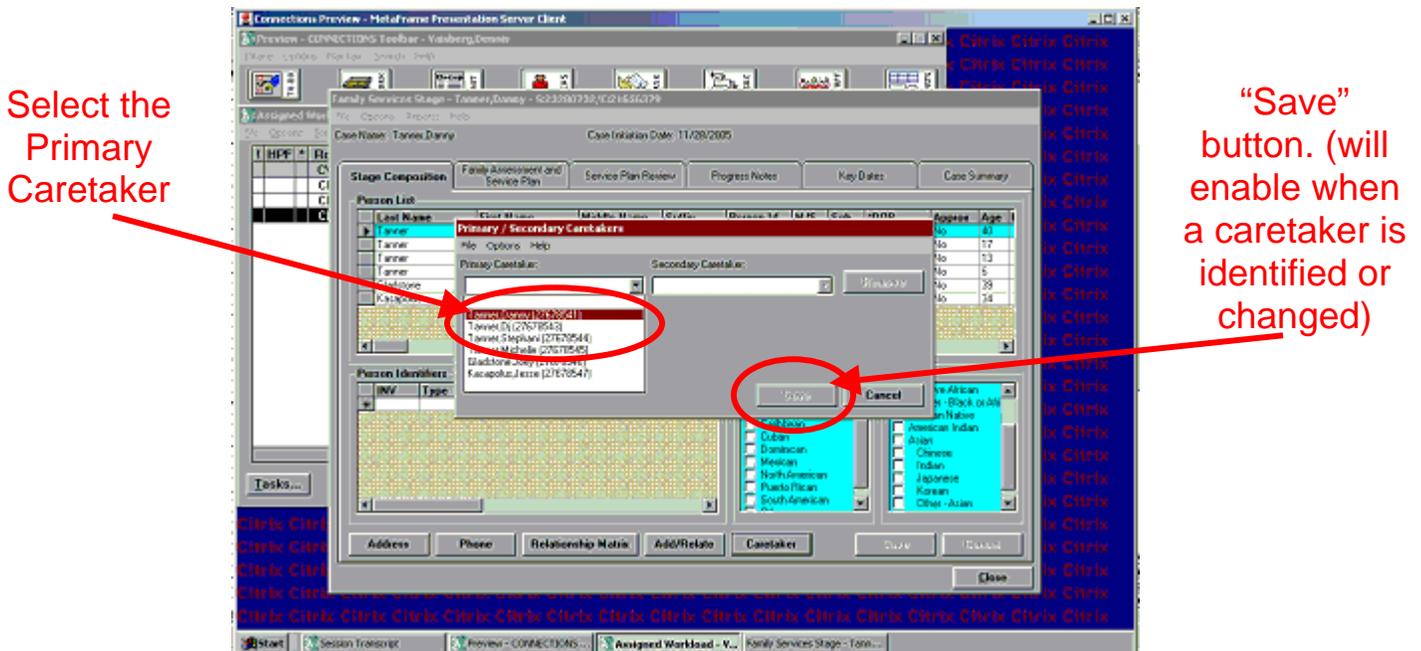
"All Stage Relationships are Complete"

Identifying the Caretaker in a Family Services Stage

To identify the Primary and Secondary (if necessary) Caretaker in a Family Services Stage, first click on the Assigned Workload button, highlight the appropriate case, and click the “Tasks” button. Then, in the Stage Composition screen, click the “Caretaker” button near the bottom of the screen.



A pop-up will appear with two dropdowns. Click on the Primary Caretaker dropdown and select the person who fills that description. Do the same, if appropriate, for the Secondary Caretaker. Click the “Save” button.



Associating a Caseworker to a Child

To associate a Caseworker to a specific child in a case, and make that worker responsible for that child's components of a FASP, access your assigned workload, highlight the appropriate case, and click on the "Tasks" Button. In the Stage Composition window of the FSS, click on the "Family Assessment and Service Plan"

Click on "Family Assessment and Service Plan"

Family Services Stage - Griffin,Lois - S:23381299/C:21718091

File Options Reports Help

Case Name: Griffin,Lois Case Initiation Date: 12/19/2005 WMS App Reg

Stage Composition Family Assessment and Service Plan Service Plan Review Progress Notes Key Dates Case Summary

Last Name	First Name	Middle Name	Suffix	Person Id	M/S	Sch	*DOB	Approx	Age
Griffin	Lois			27893621		V	12/19/1971	No	34
Griffin	Peter			27893623		V	06/13/1973	No	32
Griffin	Meg			27893624		V	06/26/1988	No	17
Griffin	Stewie			27893625		V	07/19/2004	No	1
Griffin	Chris			27893626		V	04/13/1991	No	14
Griffin	Brian			27893630		V	12/21/1973	No	32

Person Identifiers

INV	Type	Number	Start Date	End Date
*				

*Ethnicity

- Central American
- Caribbean
- Cuban
- Dominican
- Mexican
- North American
- Puerto Rican
- South American

*Race

- Native African
- Other - Black or Afr
- Alaskan Native
- American Indian
- Asian
- Chinese
- Indian
- Japanese
- Korean
- Other - Asian

Address Phone Relationship Matrix Add/Relate Caretaker Save Cancel Close

In the FASP window, click on the "Tracked Children" button.

Family Assessment & Service Plan - Griffin,Lois - S:23381299/C:21718091

File Options Reports Help

Case Name: Griffin,Lois Case Initiation Date: 12/19/2005

Initial - Not Launched

CID Trigger Dates

Date of Application: 12/19/2005 Date of Court Order: 12/29/2005

Date of Indication: Date of Placement: 12/29/2005

Next FASP Due Date: 01/18/2006 Next SPR Meeting Date:

Name	DOB	Age	PPG	Program Choice
Griffin,Lois	12/19/1971	34		
Griffin,Peter	6/13/1973	32		
Griffin,Meg	6/26/1988	17	Return to Parent	Placement
Griffin,Stewie	7/19/2004	1	Return to Parent	Protective
Griffin,Chris	4/13/1991	14	Return to Parent	Protective
Griffin,Brian	12/21/1973	32		

Launch New FASP

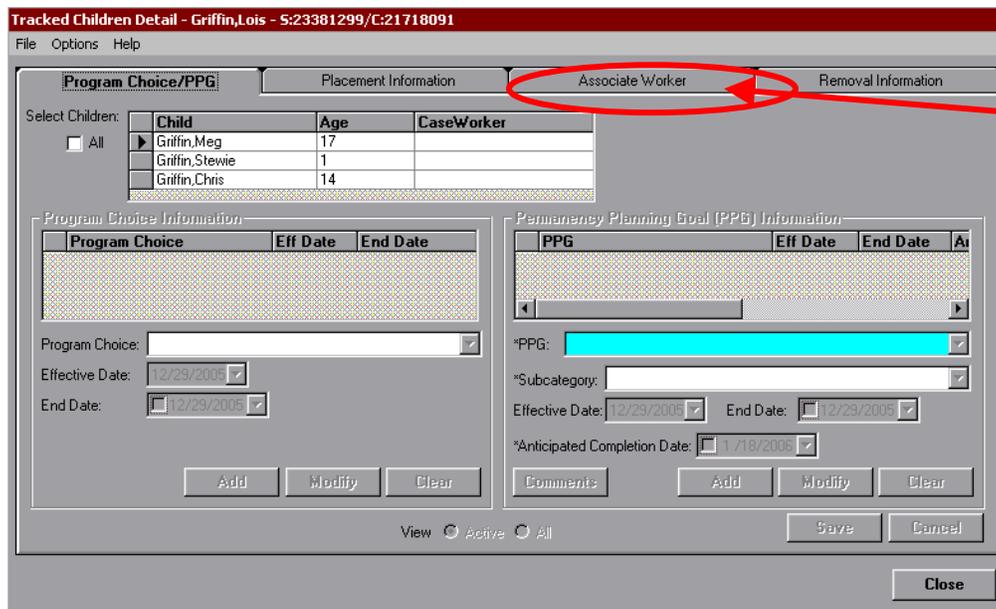
Launch

Removal Update Check FASP Detail Save Cancel Close

Tracked Children

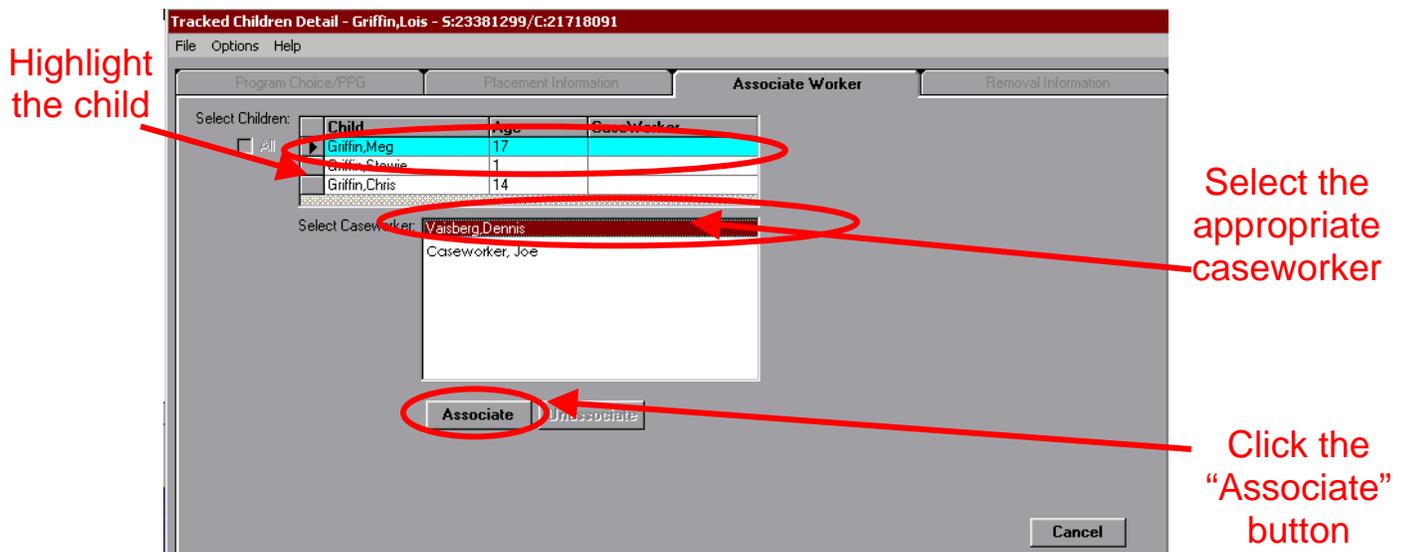
Click on the "Tracked Children" button

Click on the "Associate Worker" tab.



Click on the "Associate Worker" tab.

Highlight the child who needs to have a specific caseworker associated with him/her, select the appropriate Caseworker, and click the "Associate" button.



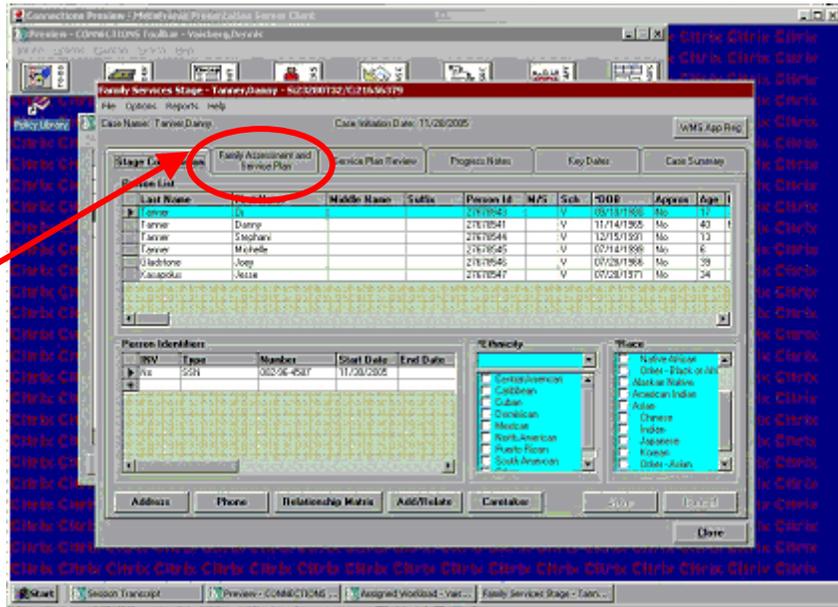
Repeat the process for other children, if necessary. Follow the same procedure to remove and associate new workers with a child, but click the "Unassociate" button instead of the "Associate" one.

Only the Case Planner or Caseworker can perform this task. A Caseworker can only associate/un-associate himself/herself to a specific child. The Case Planner can associate/un-associate himself/herself or any Caseworker to a specific child.

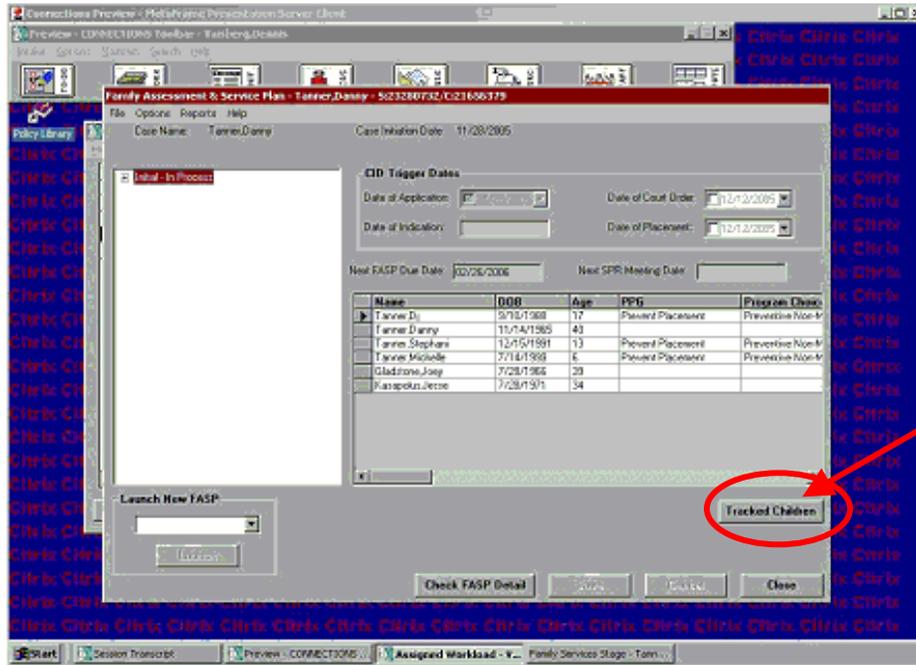
Changing a Program Choice and Permanency Planning Goal

To change the Program Choice and Permanency Planning Goal (PPG) for a child, access your assigned workload, highlight the appropriate case, and click on the “Tasks” button. That will bring you to the Stage Composition window. Click on the Family Assessment and Service Plan tab.

Click on Family Assessment and Service Plan Tab



Click on the “Tracked Children” Button in the FASP Window.



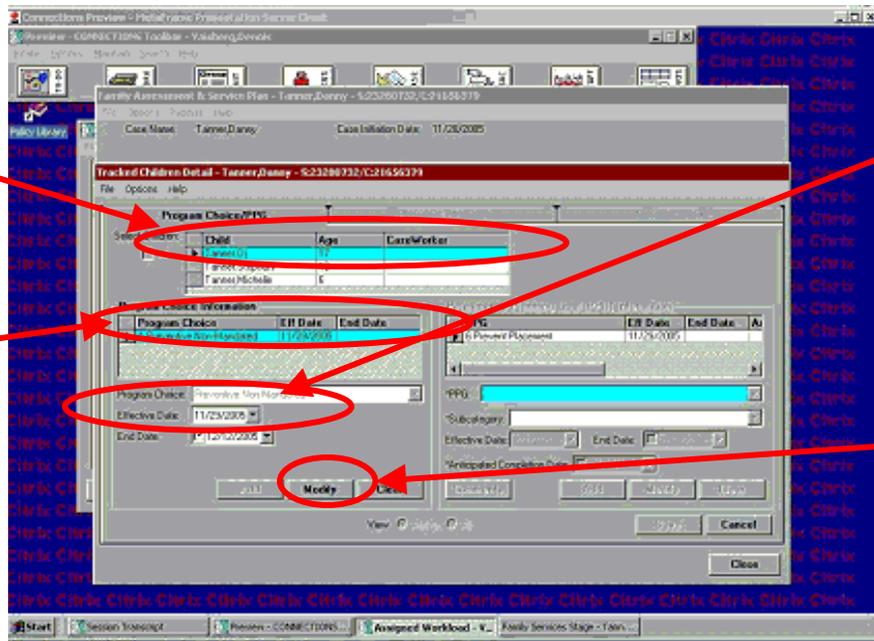
Highlight the appropriate child whose Program Choice/PPG is changing, or click the “All” checkbox if changes apply to all of the children. The child’s current Program Choice/PPG will be displayed. If the old Program Choice is being end-dated, highlight that as well. Then select the end-date for that old Program Choice. Click on the “Modify” button.

1) Highlight the appropriate child

2) Highlight the Program Choice you need to end date.

3) Select the appropriate end date

4) Click on the “Modify” button and remove the Program Choice.

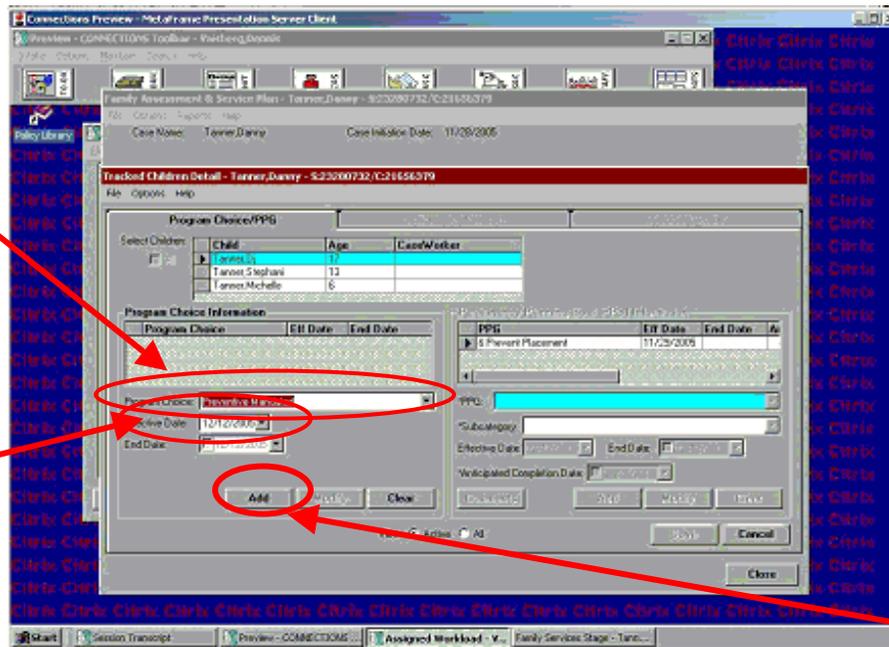


Select a new Program Choice from the list of available ones. Then select an effective date and click the “Add” button. The Effective date cannot be before the CID or before the End-Date of the last Program Choice.

Select a Program Choice

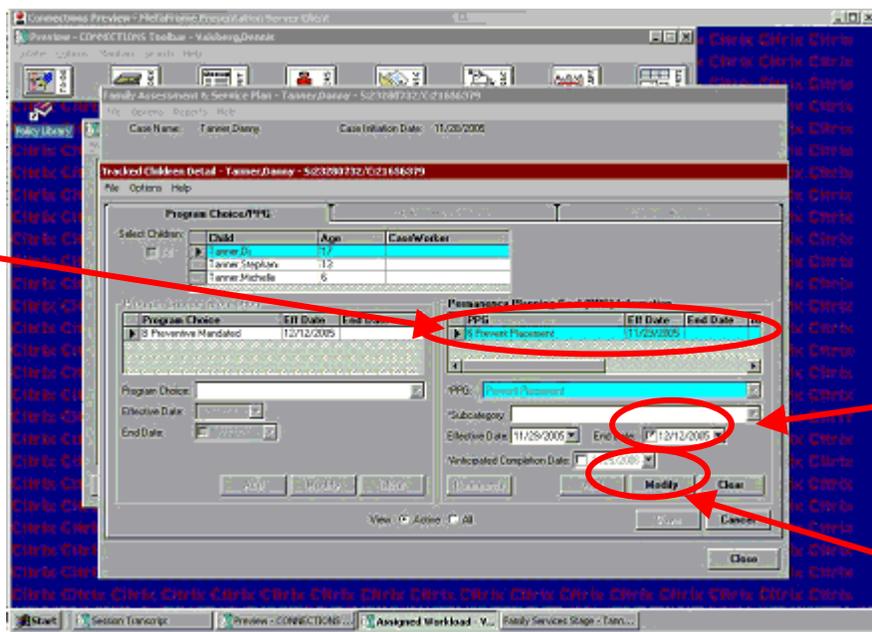
Select an effective date for the new Program Choice

Click on the “Add” button.



Highlight the PPG that you're end-dating (if you are), select an end date, and click on the "Modify" button.

Highlight the PPG you want to end date

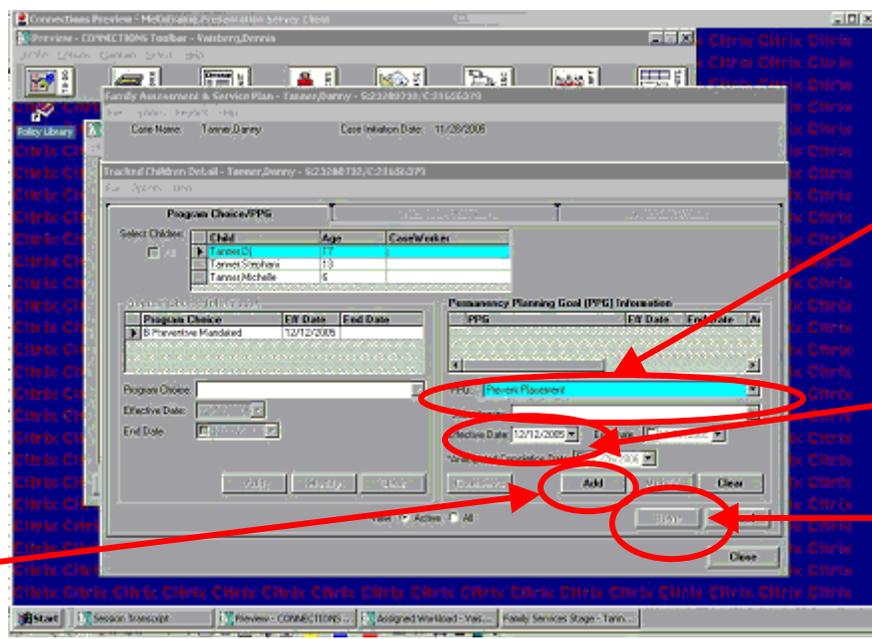


Select the appropriate end date

Click on the "Modify" button

Select a new Permanency-Planning Goal from the dropdown. Then select an effective date (it will default to today), and then click the "Add" button. Click the "Save" button.

3) Click the "Add" button



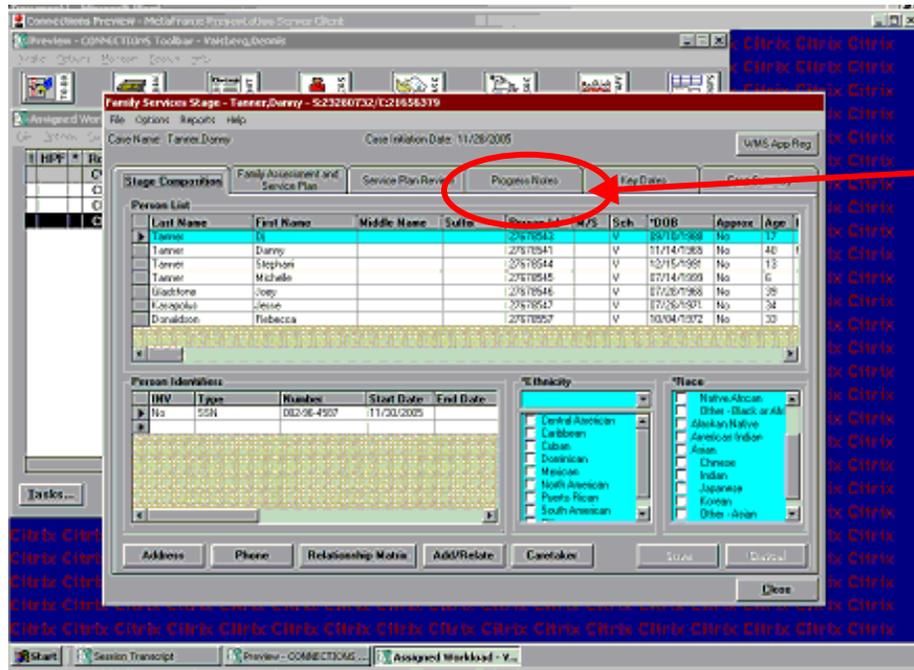
1) Select a new PPG

2) Select the appropriate effective date

4) Click on the "Save" button

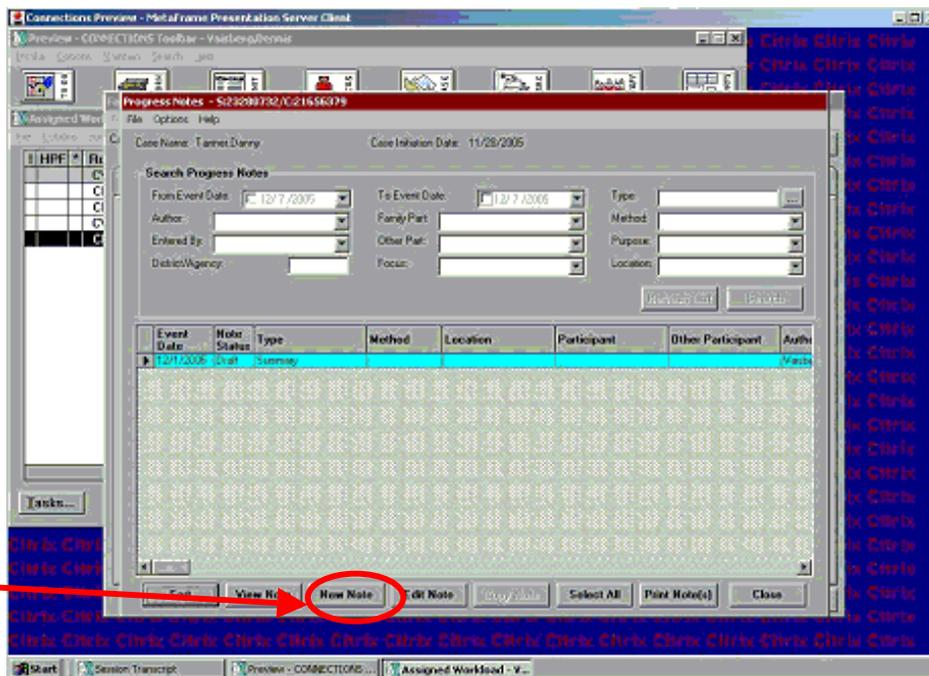
Entering a Progress Note

To enter a Progress Note for one of your cases, begin by accessing your assigned workload, highlighting the appropriate case and then click on the “Tasks” button. In the Family Services Stage window, click on the Progress Notes tab.



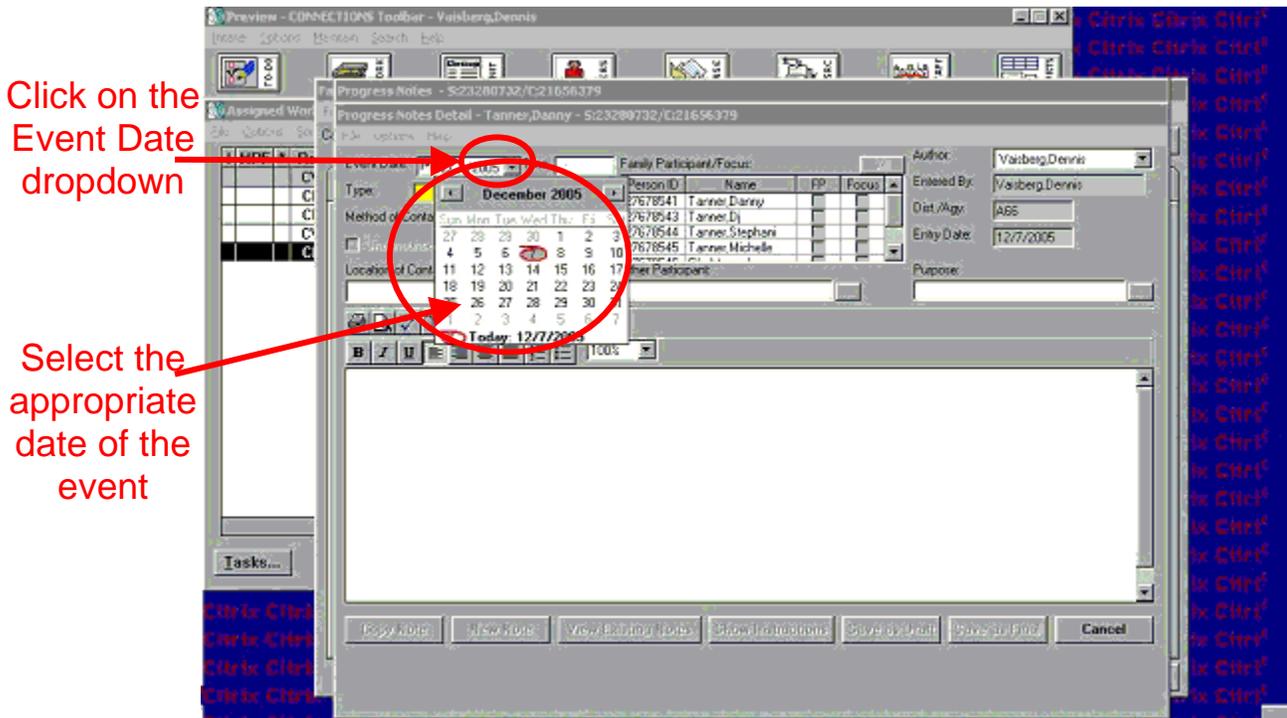
Click on the Progress Notes tab

Click on the “New Note” Button.

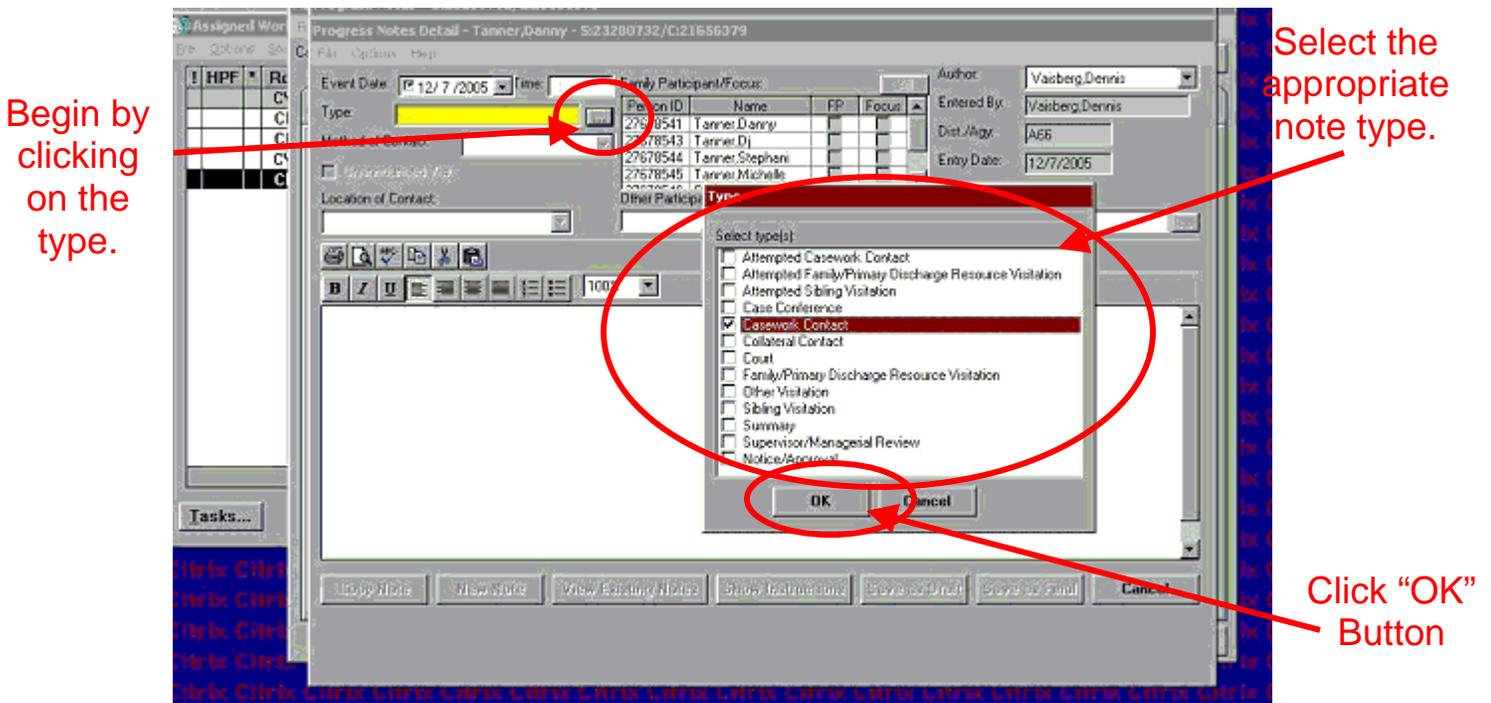


Click on "New Note"

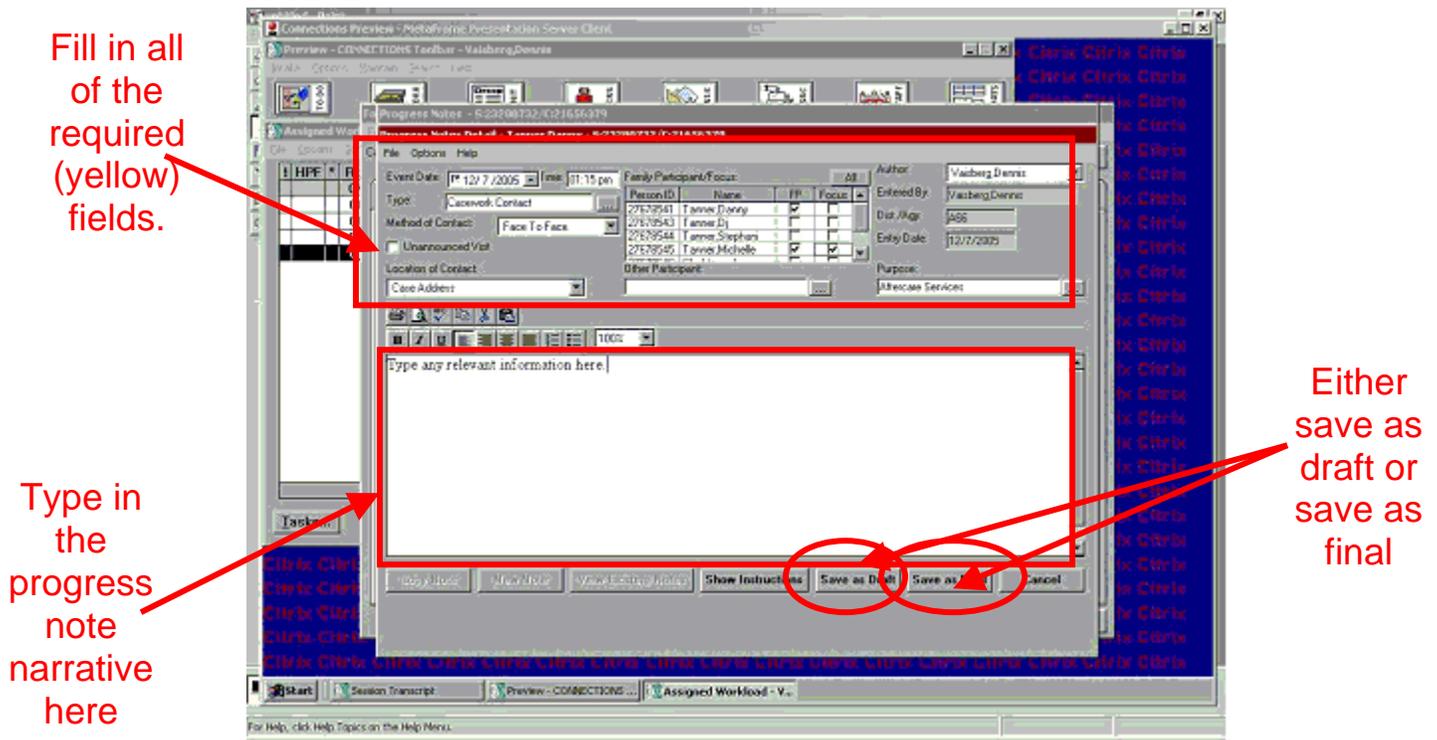
Begin by entering the date of the event being recorded. Click on the dropdown and then click on the appropriate date.



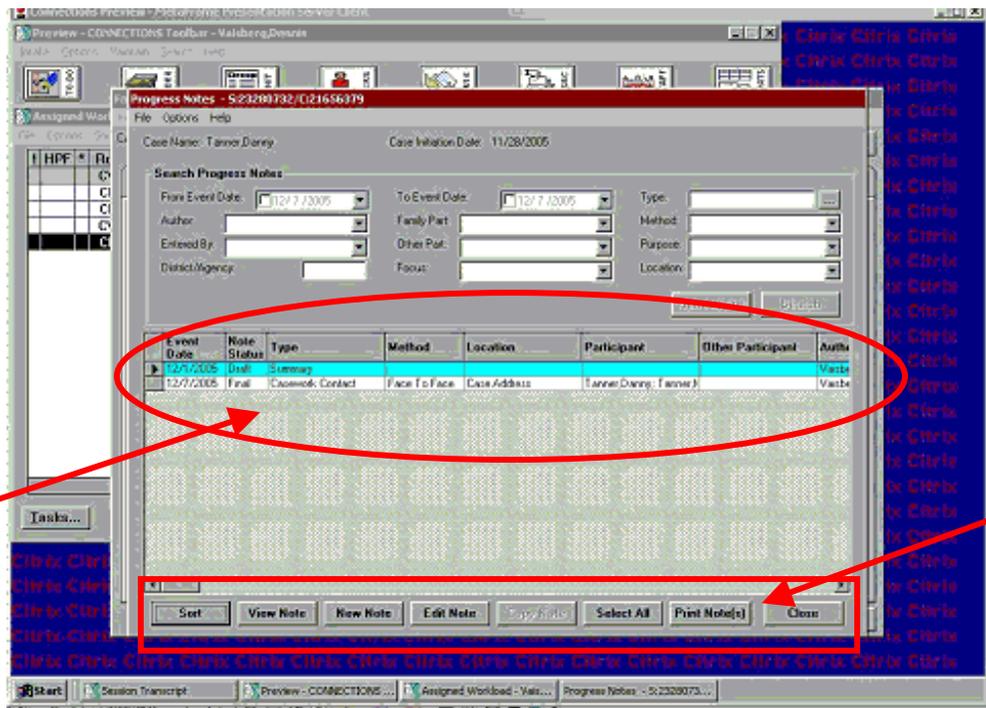
Click on the ellipses button next to the yellow box on the top left of the screen. Select the appropriate type of note and click the "OK" button.



Continue clicking on and filling out the fields that appear in yellow, as a yellow field indicates a required field. For additional help on which fields are required in different circumstances, refer to the on-line help by hitting the “F1” key. When all of the required fields are filled in, you’re ready to begin writing the progress note narrative. Type all relevant information in the narrative field. Then either click “Save as Draft” button (it will remain as a draft for 14 days and then save as final automatically) or “Save as Final” button.



Your progress note now appears in the Progress Notes window. From here you can view and print it, or sort all case progress notes and edit those entered and still marked as “draft”.

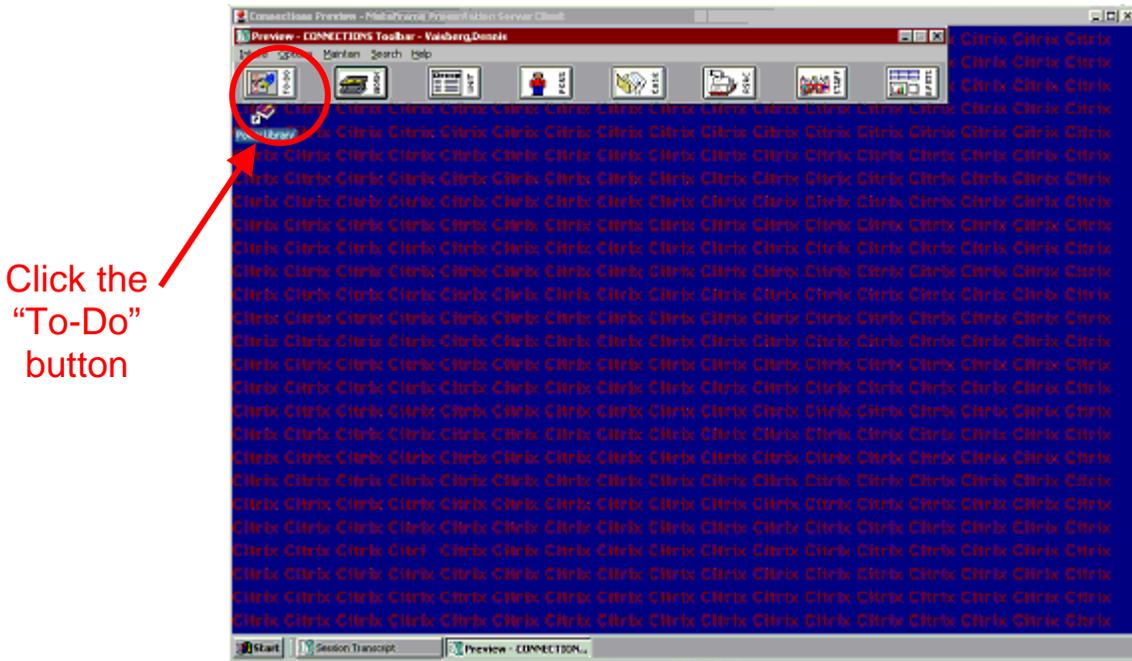


All Progress Notes for the case are here

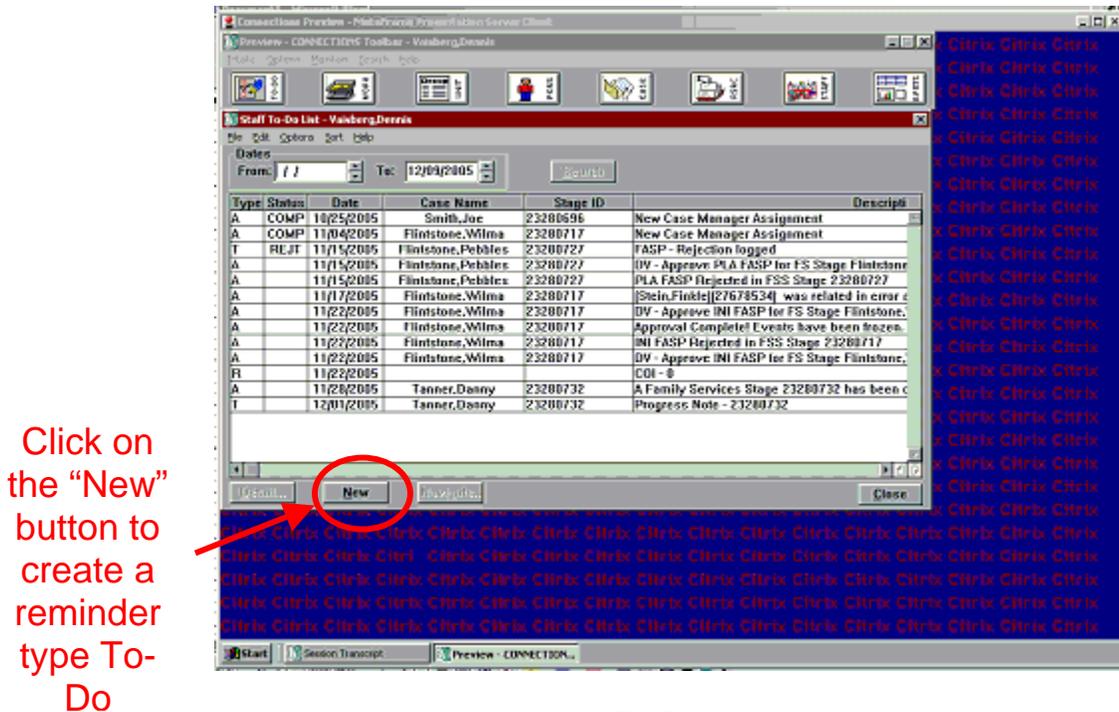
Your options for what to do with the note are listed here

Creating a Reminder Type To-Do

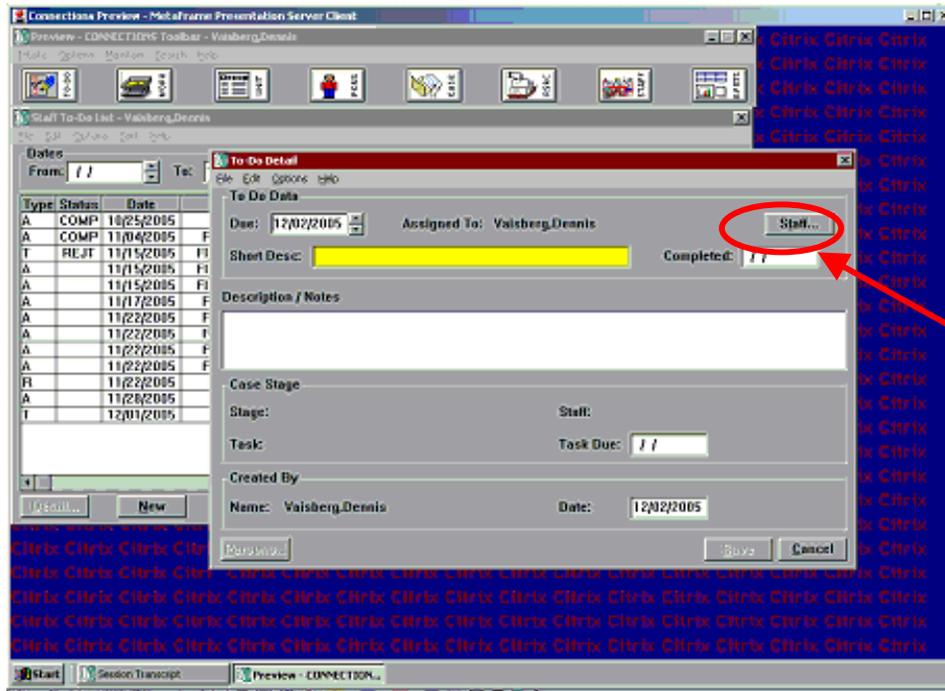
To create a To-Do to send to another worker, begin by clicking the “To-Do” button.



Click on the “New” button at the bottom of the To-Do list.

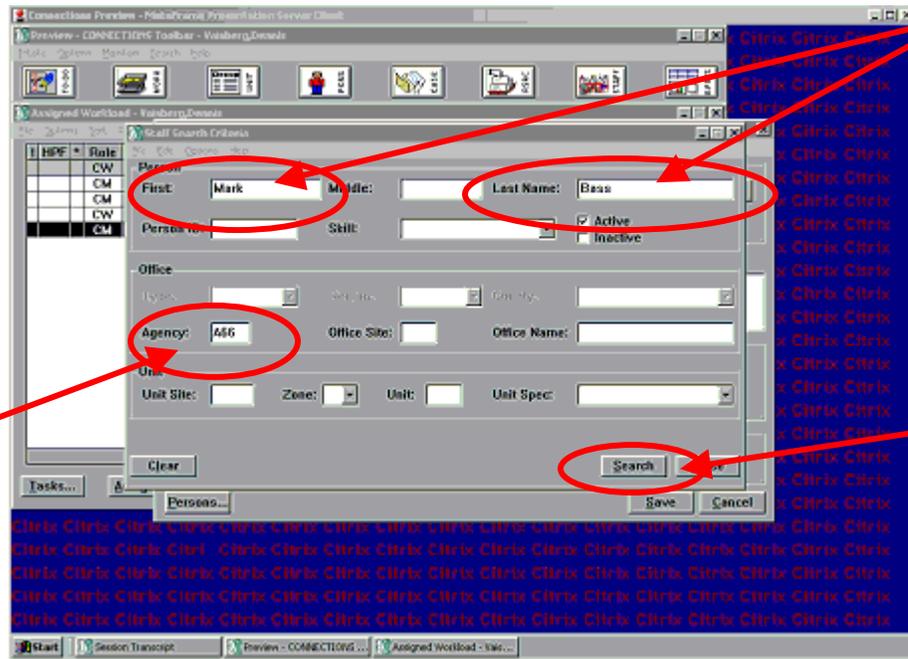


Click the “Staff” button to assign the To-Do to another person. Your name is the default recipient of the To-Do.



Click on the "Staff" button

Enter the first and last name of the person you want to assign the To-Do to. If the person does not work at your agency, you also need to enter their three-digit agency code. Then click "Search".

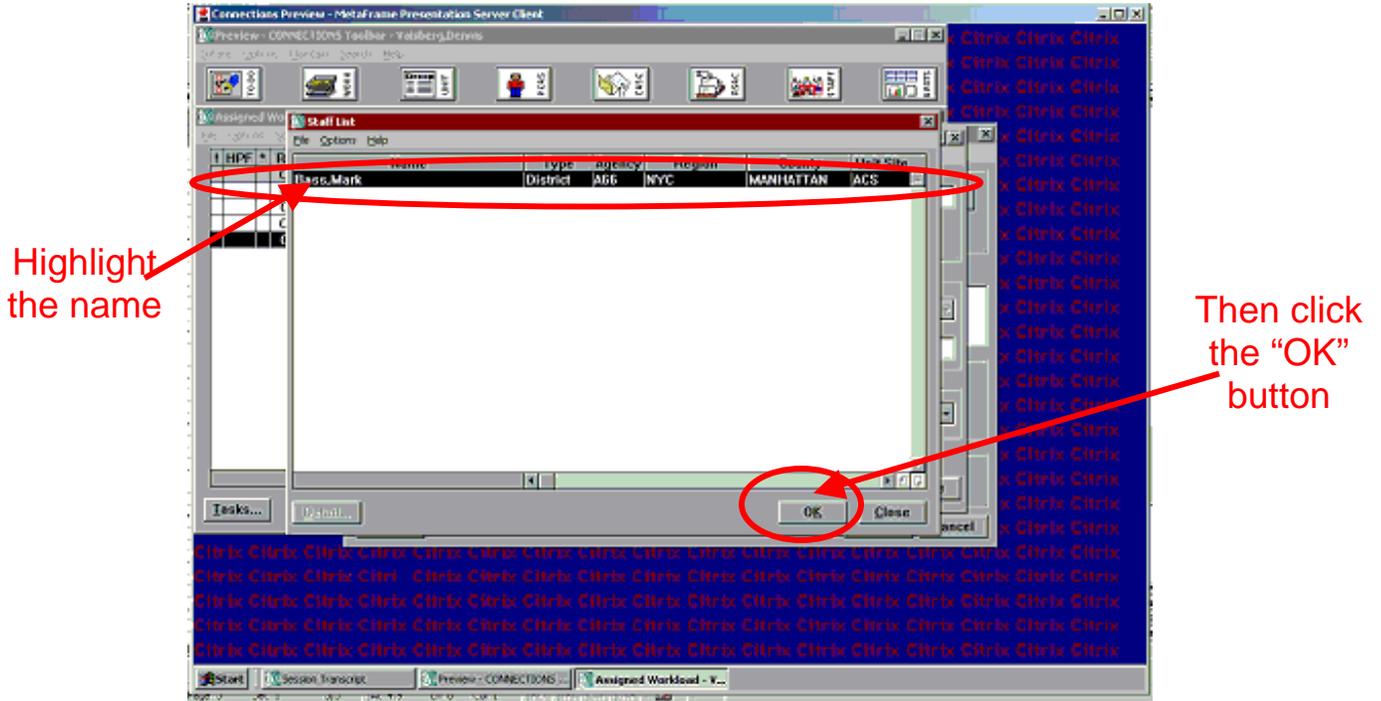


Enter the first and last name for the individual you want to send a To-Do to

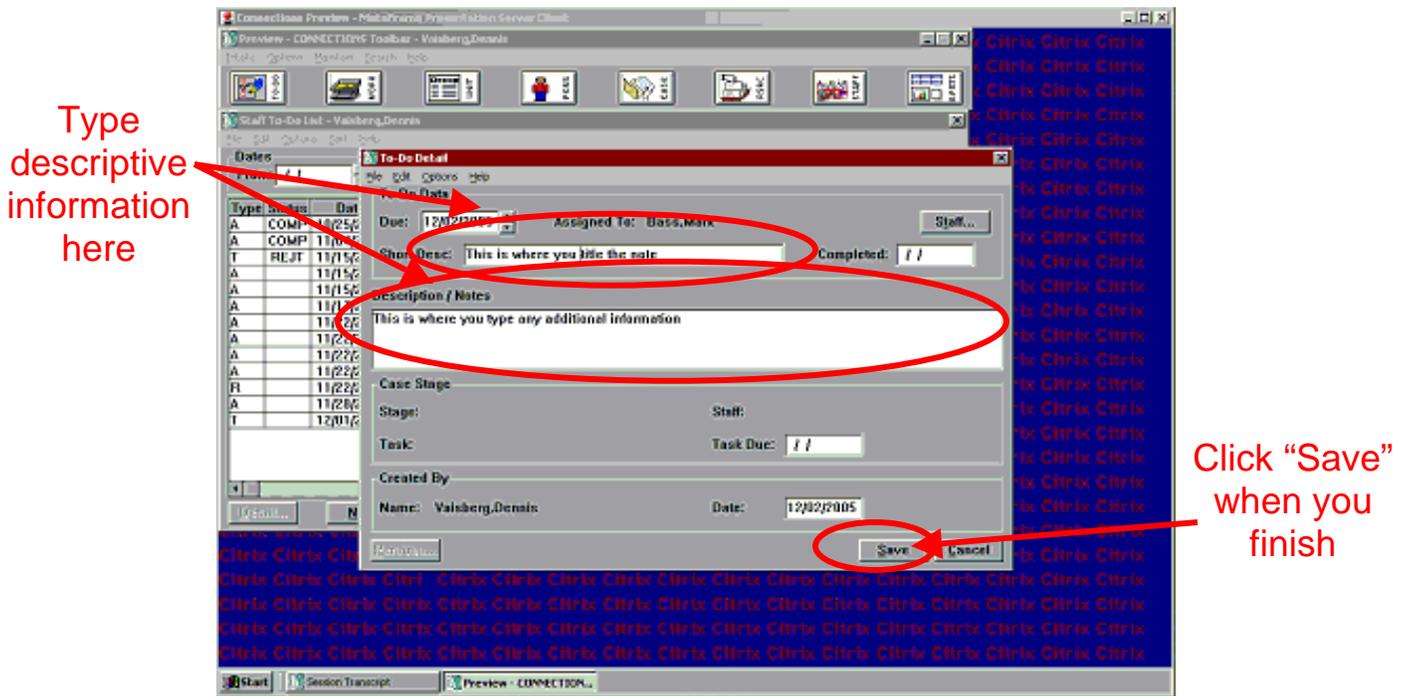
Then click "Search" button

Change the agency code, if necessary

Highlight the name of the person you want to assign and click the "OK" button.



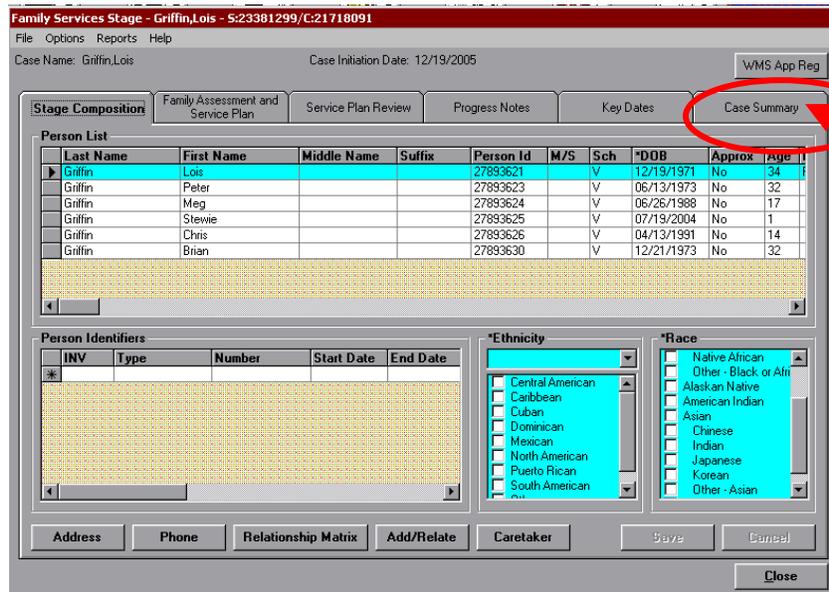
Type the title of the reminder in the Short Description section, and add any additional information in the Description/Notes section of the note. Click the "Save" button.



Submitting an FSS for Closure

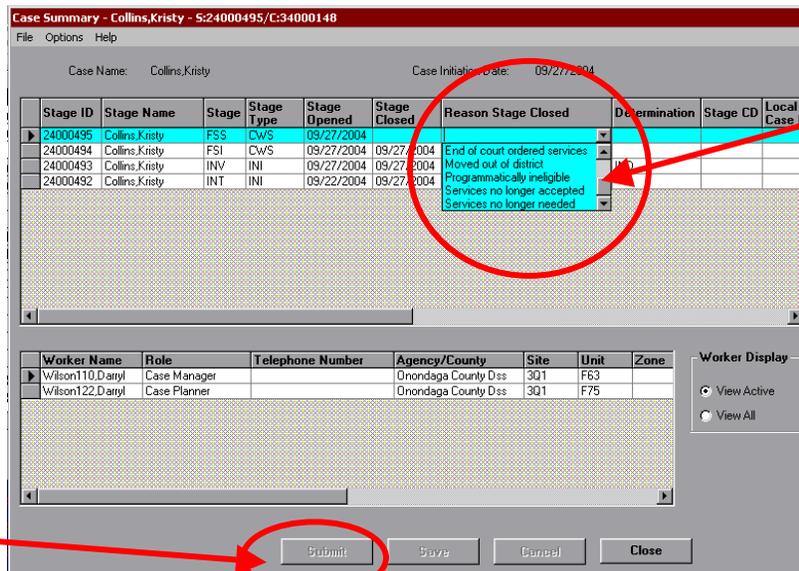
Only the Case Planner or the Case Manager may close an FSS. If the Case Planner initiates the stage closure, s/he submits it to his/her Unit Approver and Case Manager for approval. If the Case Manager initiates the stage closure, s/he submits it to his/her Unit Approver for approval.

It is the Case Manager's responsibility to check WMS to make sure the case status isn't pending or in error before beginning the closure process. To submit an FSS for closure, access your assigned workload, highlight the appropriate case, and click on the "Tasks" button. In the Family Services Stage window, click on the Case Summary Tab.



Click on the Case Summary tab

Select a reason the stage is closing. Then click on the "Submit" button.



Select a reason for the closing of the stage.

Then click "Submit" Button

If the stage is a CWS type FSS, you may encounter a pop-up telling you that discharge information is required by regulation. It will then ask you if you wish to complete a FASP or Plan Amendment.

If the status change information is supposed to be recorded in a Plan Amendment, and this message indicates the Plan Amendment has not been completed, then the Case Planner has not completed the Plan Amendment. If this is the circumstance, answer, “Yes” and inform the Case Planner a Plan Amendment needs to be completed and submitted for approval (or complete a Plan Amendment if you are the Case Planner).

If the status change information should be submitted as a Progress Note (when a Plan Amendment is not available—e.g. when an FSS/CWS stage is being closed and there has not yet been an approved FASP), then you should answer “No”. If you answer “No”, the text box will turn yellow. The system requires you to respond to the question. When you’ve documented the appropriate information, click the “OK” button.

Case Summary - Collins, Kristy - 5:24000495/C:34000148

File Options Help

Case Name: Collins, Kristy Case Initiation Date: 09/27/2004

Stage ID	Stage Name	Termination	Stage CD	Local Case #
24000495	Collins, Kristy			
24000494	Collins, Kristy			
24000493	Collins, Kristy			
24000492	Collins, Kristy			

Stage Closure Question

File Options Help

There is no Plan Amendment or Pending FASP for this stage. Closing and or discharge information is required by regulation. Do you wish to do one now?

If No....

Describe the level of achievement for outcomes essential to the Child(ren)'s Safety, Permanency and Well-Being.

Worker Name Title

Wilson, Darryl	Case I
Wilson, Darryl	Case I

Spell Check

Submit Save Cancel Close

Work Display

View Active

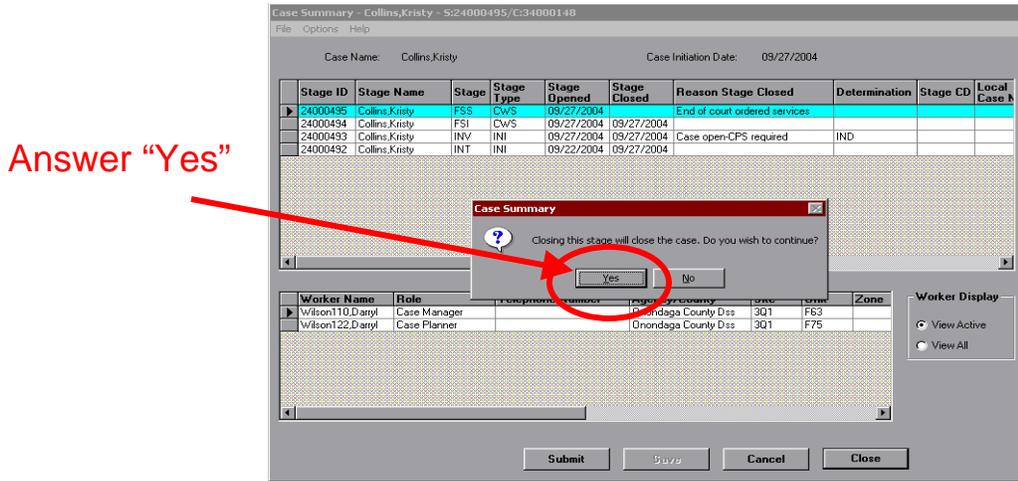
View All

Either answer “Yes” (if a Plan Amendment has been done) or “No” (if it has not).

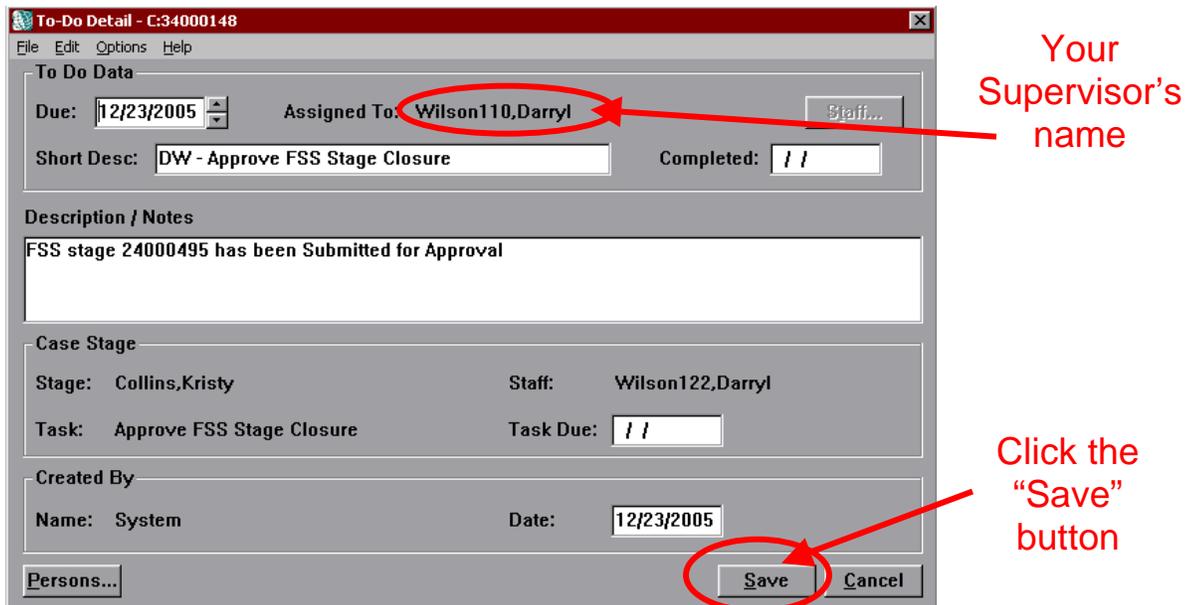
If you answered “No”, you’re required to enter a response to the question on the screen.

Then click the “OK” button

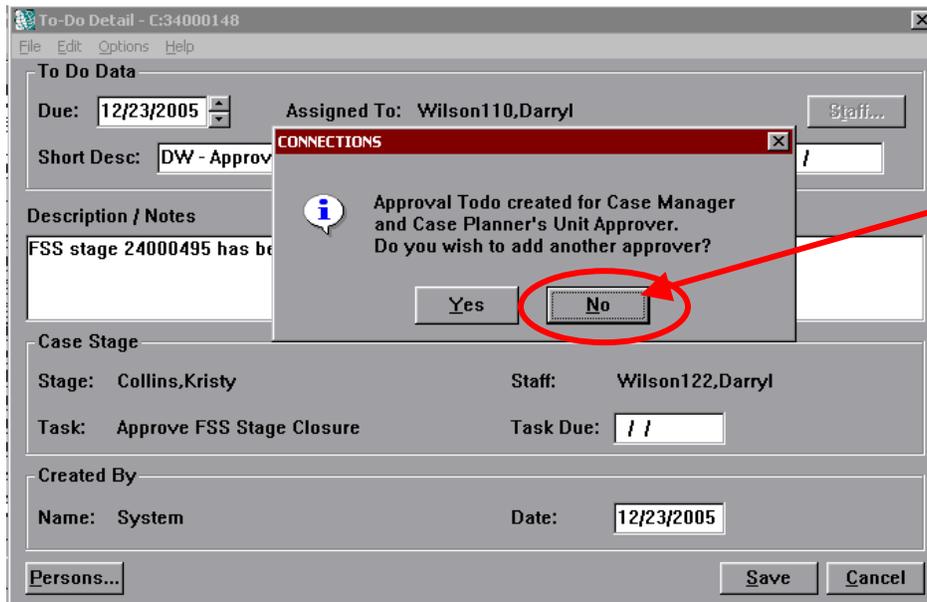
You will then encounter one or two pop-up windows. If there are no other open stages in the case, your first pop-up will ask, “Closing this stage will close the case. Do you want to continue?” Answer, “Yes”. If there are other open stages in the case, you will only receive the following pop-up, to which you can answer “Yes”: “This action will close this window. Do you want to continue?”



A To-Do will appear with your Supervisor's name in the top right. Click the "Save" button to submit the closure to your Supervisor.



Answer "No" to the question of whether or not you wish to add another approver, if you do not wish to add one.



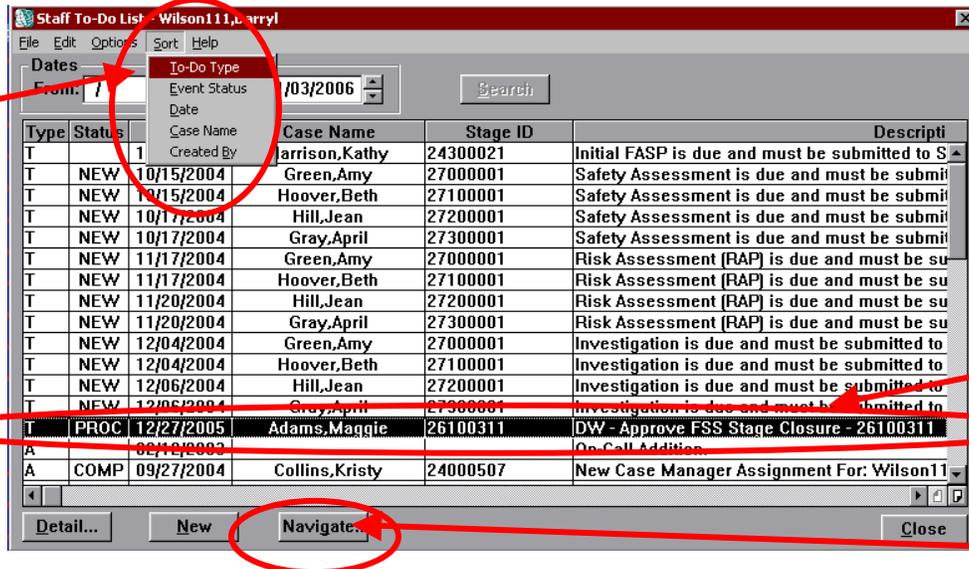
Answer
No to this
question

After the closure is approved by your supervisor and is subsequently deleted from your workload, you can submit the WMS paperwork to WMS Data Entry worker so that they can close the case in WMS.

Approving an FSS Stage Closure

For a Supervisor to approve the closure of an FSS, click on your To-Do list and find the appropriate To-Do. It may be helpful to sort the list by To-Do type. After you've highlighted the appropriate To-Do, click on the "Navigate" button.

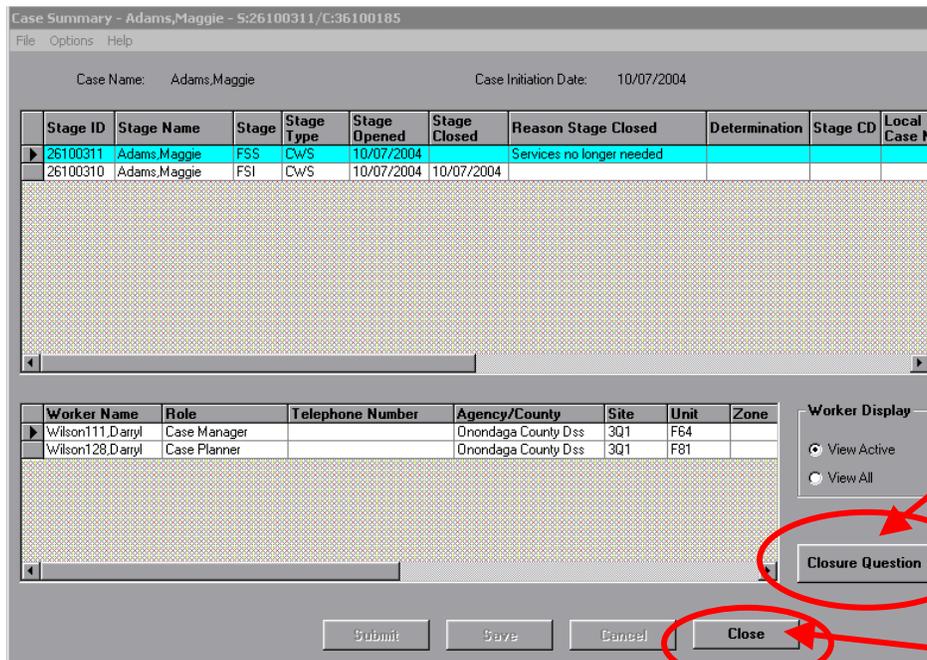
Sorting by To-Do type brings all Task type To-Dos' to the top; it may help you find the appropriate To-Do.



Highlight the appropriate To-Do

Then click the "Navigate" button

If there are no other open stages in the case, you will encounter a pop-up that tells you that closing this stage will close the case, if so, click the "Yes" button. You will be brought to the Case Summary for the case that is closing. You may encounter a pop-up that tells you that the closure question has been answered. When you are done reviewing this section, click the "Close" button.



You might want to look at the Closure Question

Click the "Close" button

The approval status screen will appear. To approve the closure of the stage, simply click on the “Approve” button, answer “No” to the question of whether or not you want to add another approver (if appropriate) and then click the “Save” button.

The screenshot shows a window titled "Approval Status - Collins,Kristy - S:24000519/C:34000154". It contains the following sections:

- Case Information:** Case Name: Collins,Kristy; Stage: FSS; Approval Topic: DW - Approve FSS Stage Clos; Staff: Wilson128,Darryl
- Table:** A table with columns Date, Time, Approver, and Status. The first row shows a date of 11, a time of :, an approver of Wilson111,Darryl, and a status of PEND.
- Approval Information:** Approver: Wilson111,Darryl; Date: 12/27/2005; Time: 03:05 PM
- Comments:** A text area for entering comments.
- Buttons:** Approve, Reject, Clear, Save, and Cancel.

Click “Approve”, answer “No” to the ensuing pop-up.

Then click the “Save” button

CONNECTIONS Help Resources:

- Electronic Resources
 - CONNECTIONS Intranet – contains a wide variety of information related to CONNECTIONS, including FAQs, Job Aides, Implementation Tools and important informational updates. Any user connected to the state network can access this site at <http://ocfs.state.nyenet/connect/>.
 - CONNECTIONS Case Management Step-by-Step Guide – a comprehensive application manual located on the “Step-by-Step/Job Aides/Tips” page of the CONNECTIONS Intranet site.¹
 - On-line Help within the application -- the F1 key (located next to the Esc key at the top of your keyboard) will provide context-sensitive on-line help about the item currently in focus.
- Staff Resources
 - Resource Users -- Resource Users at each site can provide assistance to other users regarding CONNECTIONS use. Check with your supervisor to identify your site’s Resource Users.
 - New York State Enterprise Help Desk (EHD) -- provides technical support to all state computer users with NYS technical/connectivity issues, and CONNECTIONS application assistance and troubleshooting. EHD staff can also assist with password resets (for state staff and Voluntary Agency staff). The phone number for EHD is (800) 697-1323. You will need to have your NYS NTID ready to provide to the EHD representative.
 - CONNECTIONS Field Support Teams – The CONNECTIONS project has a team assigned to each region. Their job is to help the districts and agencies staff use the CONNECTIONS application most efficiently. Additionally, they can provide on-site support to assist specific users. A complete list of these staff is located on the “Contact Us” page of the CONNECTIONS Intranet site.

¹ The CONNECTIONS Case Management Step-by-Step Guide was distributed in hard copy format at the beginning of the Build 18 deployment. This document is no longer printed for distribution and users should make sure they have inserted the latest updates from the Intranet version if they continue to use it. The document was also released on a CD—users should only use the most recent version of the CD.