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CONNECTIONS

System Build 18 Job Aid

Interfaces



**CONNECTIONS Training Project
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**CONNECTIONS - System Build 18 Job Aid
Interfaces
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This Job Aid is available on the CONNECTIONS intranet site:
OCFS intranet home page > CONNECTIONS > Step-by-Step/Job Aids/Tips

The OCFS CONNECTIONS intranet site also contains information about trainings offered to support you in your work with CONNECTIONS.



Introductory/Explanatory Note

The first module of this Job Aid is intended primarily for CONNECTIONS workers (e.g. CPS, Foster Care, Preventive workers). The module provides information about the interfaces between CONNECTIONS and two Legacy systems—Welfare Management System (WMS) and Child Care Review Service (CCRS)—introduced with CONNECTIONS Case Management (Build 18). Because it is intended for CONNECTIONS workers, the module describes only transactions performed in CONNECTIONS related to the interfaces.

The second module of this Job Aid is intended primarily for WMS data entry workers and for line supervisors authorized to work in CONNECTIONS and WMS. The module describes how data entry processes are affected by the CONNECTIONS/WMS interface. To this end, descriptions of Application Registration, Full Data Entry and Authorization Change procedures include both CONNECTIONS and WMS operations. While these descriptions do not in all cases contain full step-by-step instructions, they do contain detail sufficient to explain the possible consequences of transactions performed in one system upon the other and enable the worker to successfully negotiate the interface. (For more detailed step-by-step instructions, please refer to the appropriate manuals.)

Specifically, this Job Aid contains information about:

- the Legacy Systems;
- the interface between WMS and CONNECTIONS;
- the interface between CCRS and CONNECTIONS;
- creating a Child Case Record;
- batch updates;
- initiating a new WMS case;
- maintaining demographic information in CONNECTIONS;
- adding an individual;
- end-dating an individual; and
- closing a WMS case.



This Job Aid provides instructions for performing tasks related to the CONNECTIONS interfaces. You should use these as a guide, but always follow specific local agency procedures that are in place.

Module 1:

Legacy System Interfaces

Prior to the development of CONNECTIONS, two related computer systems—the Welfare Management System (WMS) and Child Care Review Service (CCRS)—were used to record child welfare information; these systems are currently still in use. With the implementation of the CONNECTIONS Case Management System (Build 18), CONNECTIONS interfaces with these two Legacy systems in order to share information. Note, however, that these two Legacy systems remain the systems of record for Child Welfare Services cases, until full integration with a future Build.

An interface is a point of ongoing communication between two or more systems; in this case, CONNECTIONS and the Legacy systems (WMS and CCRS). This differs from a conversion, which brings the data into CONNECTIONS as a one-time-only process. The interface with WMS serves to minimize duplicative data entry when a Family Services Stage (FSS) is created. The duplication of data recording (i.e., the recording of demographics and routine case data on multiple systems) is reduced; this automated interface with WMS can also eliminate some of the manual steps previously required to open cases and can keep some data synchronized between the systems.



The automated interface should not replace any means of communication between Services and Non-Services workers. Any questions or discrepancies should be discussed.

The CCRS interface sends placement and legal information in a nightly batch update so it can be viewed in CONNECTIONS; no data is updated in CCRS by CONNECTIONS. WMS feeds demographic data to CCRS so that the information within the two systems is in sync. WMS and CCRS both contain information for managing a Child Welfare Services case:

Welfare Management System (WMS)	WMS collects records and tracks specific information, including case and child demographics, eligibility data and authorizations for services being provided to children and families.
Child Care Review Service (CCRS)	CCRS records the tracking of children in receipt of Child Welfare Services (children in receipt of preventive, protective or foster care services), additional child demographics and case information; and tracks all child movements (placements), legal and adoption activities, and assessment service plans for tracked children. It is also the source of data for the Adoption Monitoring System (AMS).
CONNECTIONS	A case management system that records and tracks case data and individual demographic data; the system shares this data with WMS via the Build 18 interface.

WMS Interface

Demographic information in WMS and CONNECTIONS is kept in synch through an interface. After case initiation (Application Registration) in CONNECTIONS, the balance of the activities required to open a case in WMS *must* be completed, and services must continue to be authorized, in WMS until Build 19. These activities encompass the Full Data Entry (FDE) process, which consists of establishing a Client Identification Number (CIN), assigning a Case Number, and authorizing Direct Services and Purchase of Services (POS). Undercare Maintenances, Reauthorizations and Closings must be performed directly in WMS.

Workers with a role in the case or any worker with access to another worker's *Assigned Workload* can modify information in WMS through CONNECTIONS. The interface is between the CONNECTIONS FSS and WMS; there is no link at the point of a Family Services Intake (FSI). The CONNECTIONS/WMS interface is only available for Family Services Stages with a stage type of Child Welfare Services (FSS/CWS), Child Case Record (FSS/CCR) or Advocates Preventive Only (FSS/ADVPO) stages.

New FSSs in CONNECTIONS are linked to a Case Number in WMS. The interface links the individuals in those stages to CINs in the corresponding WMS case once the WMS case status is Active, No Pend.

Application Registration and certain maintenance tasks for Child Welfare Services cases are conducted in CONNECTIONS; the WMS initiation of Application Registration is disabled for Child Welfare Services cases.



The paper-based Application for Services (LDSS 2921) must still be signed by either the client or the worker (on behalf of the client).



The local district is to follow local procedures for obtaining a new Services Case Number or "reuse" an existing Services Case Number for opening a WMS case.



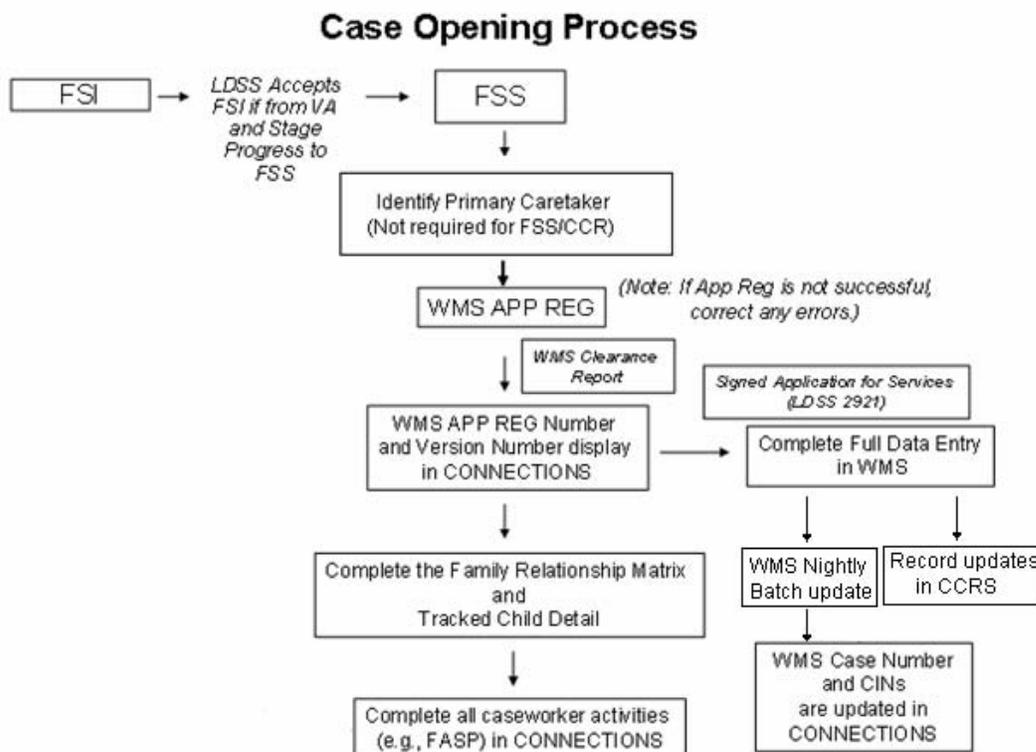
Initiation of a Child Welfare Services case in WMS is not allowed; this must be performed in CONNECTIONS.

Tips:

- You cannot close a Services case in WMS when the CONNECTIONS case is still open. When a WMS case is linked to an open FSS stage in CONNECTIONS, the CCRS Indicator in WMS will be “Z.” Once the CONNECTIONS stage is closed, the CCRS Indicator in WMS changes from a “Z” to a “Y,” indicating that the WMS case may now be closed.
- The first person entered in CONNECTIONS—either from the State Central Register CPS Intake stage or in the Family Services Intake (FSI)—is sent to WMS as the Line 01 in WMS. The WMS worker designates the Applicant/Payee when completing WMS Full Data Entry. Once entered in CONNECTIONS, the line number of a person cannot be changed in WMS. In WMS, the Applicant/Payee can be assigned to any line number. **Note:** The order in which the persons *display* on the FSS **Stage Composition** tab in CONNECTIONS does not necessarily reflect the order in which the persons were *entered* into CONNECTIONS.
- The Office/Unit/Worker information for the Case Manager (from the *Staff Detail* window in CONNECTIONS) is sent to WMS; however, if the case is reassigned, the new Case Manager code is not automatically sent from the *Assign* window. The worker must perform the Application Registration Maintenance process on the **Stage Composition** tab (see “Application Registration Maintenance” on page 19 for details). The Center Office, Unit, and Worker fields continue to be modifiable in WMS; however, CONNECTIONS information will override the changes made in WMS.

WMS Case Initiation (Application Registration) Process

When a new FSS/CWS, FSS/CCR or FSS/ADVPO stage is created in CONNECTIONS, it is necessary to create the companion WMS case; this process is called Application Registration. Once a worker selects a Primary Caretaker in the FSS stage in CONNECTIONS, the **WMS App Reg** button on the *Family Services Stage* window **Stage Composition** tab becomes enabled; the button remains enabled until a local district worker clicks on it. Note that there is no system edit to require a worker to click on this button. The graphic below represents the typical case initiation process.



The **WMS App Reg** button becomes enabled when *all* of the following conditions are met:

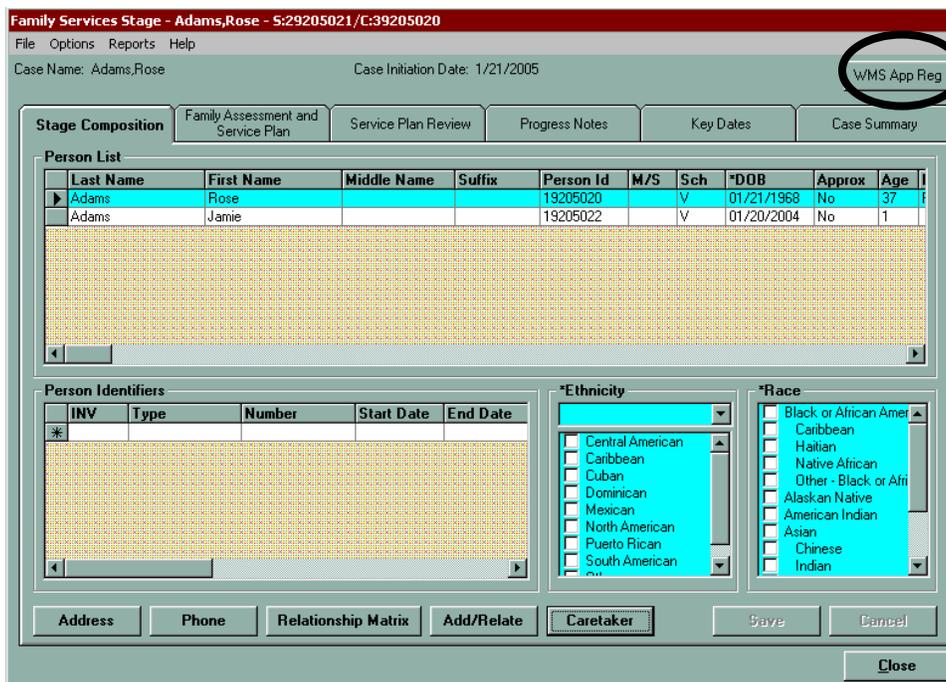
- The worker is a local district worker. The button *never* displays for voluntary agency workers.
- A Primary Caretaker is identified or the **No Primary Caretaker Exists** checkbox is selected on the *Primary/Secondary Caretakers* window in CONNECTIONS. (**Note:** This is not required for an FSS/CCR). This window is accessed by clicking on the **Caretaker** button on the **Stage Composition** tab.
- An active Primary Address exists in CONNECTIONS for the Primary Caretaker. (If the stage type is CCR or if the **No Primary Caretaker Exists** checkbox is selected, the address used for Case Address defaults to the primary address of the first individual in the case.)

- The following demographic fields are populated for *all* individuals:
 - First Name
 - Last Name
 - Middle Initial
 - Suffix
 - Date of Birth
 - Sex
 - Social Security number (if available)



The Date of Birth/Approximate Age, Sex and Primary Caretaker's Address are required entries. The SSN is not required; however, it is preferable to enter one in the system if the worker can obtain one for the client.

The graphic below shows the CONNECTIONS *Family Services Stage* window **Stage Composition** tab with the **WMS App Reg** button enabled:



Family Services Stage - Adams,Rose - S:29205021/C:39205020

File Options Reports Help

Case Name: Adams,Rose Case Initiation Date: 1/21/2005

WMS App Reg

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

Person List

Last Name	First Name	Middle Name	Suffix	Person Id	M/S	Sch	*DOB	Approx	Age
Adams	Rose			19205020		V	01/21/1968	No	37
Adams	Jamie			19205022		V	01/20/2004	No	1

Person Identifiers

INV	Type	Number	Start Date	End Date
*				

*Ethnicity

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

*Race

- Black or African Amer
- Caribbean
- Haitian
- Native African
- Other - Black or Afri
- Alaskan Native
- American Indian
- Asian
- Chinese
- Indian

Address Phone Relationship Matrix Add/Relate Caretaker Save Cancel Close

When a worker clicks on the **WMS App Reg** button, the following case-level data is sent immediately from CONNECTIONS to WMS:

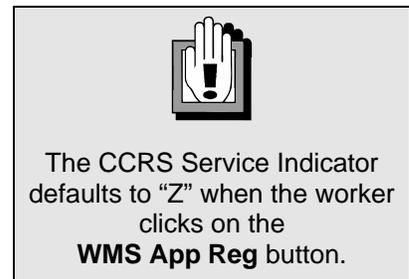
- Center/Office
- Unit/Worker
- District
- Service Indicator
- Case Type=40 (Services)
- CONNECTIONS Primary Caretaker (WMS Case Name)
- Primary Caretaker's (primary) address

If any required information is missing when a worker clicks on the **WMS App Reg** button, a message displays listing *any* of the following:

- Application Date
- Mailing Address (not required, but if *any* address fields are populated, *all* of the following must be added: Street, City, State and ZIP)
- Residential Address: Street, City, State and ZIP
- Individual fields: First Name, Last Name, Date of Birth (or approximate age) and Sex

The following fields are generated automatically for the Application Registration process with the associated values:

- CASE-TYPE = 40 (Services)
- CCRS-IND (Indicates that the case has an open, linked FSS) CCRS-IND code "Z" on the Service Authorization LDSS 2970 form indicates that the case is known to and open in CONNECTIONS

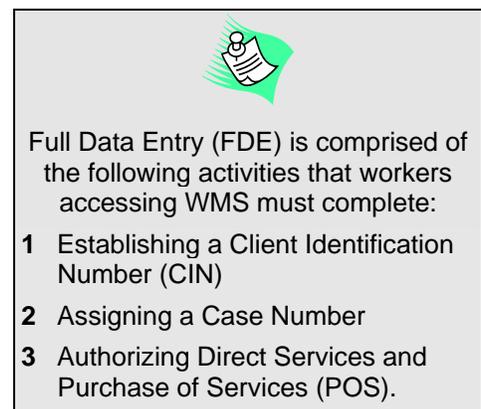


A field in the upper right-hand corner of the header in the *Family Services Stage* window in CONNECTIONS contains the following values once the Application Registration process initiates:

- App Reg/Ver** Displays the Application Registration number and Version number once a WMS Application Registration transaction is initiated via CONNECTIONS and returns a value to CONNECTIONS.
- WMS Case #** Displays the WMS Case Number once it is returned via the daily batch updates with an opening transaction; this links the FSS in CONNECTIONS to the WMS case. Note that this field label does not display until after Full Data Entry (FDE) is complete.

This field (and field label) does not display until the Application Registration process has been initiated. Clicking on the **WMS App Reg** button creates an "Application" (not a case) in WMS. It is considered a "case" only after the FDE process is completed in WMS.

CONNECTIONS will not indicate whether FDE has *begun* or not; once Application Registration is initiated by clicking the **WMS App Reg** button, the Registry and Version numbers will remain on the *Family Services Stage* window until FDE, WMS case opening and overnight batch processing are completed. Before making changes to shared data fields, be sure to check with WMS staff to verify the status of the WMS record.



The graphics below show the **App Reg/Ver** and **WMS Case #** on the *Family Services Stage* window in CONNECTIONS:

Family Services Stage - Adams,Rose - S:29205259/C:39205260

File Options Reports Help

Case Name: Adams,Rose Case Initiation Date: 1/20/2005 App Reg/Ver: 123456/01 WMS Synch

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

Person List

Last Name	First Name	Middle Name	Suffix	Person Id	M/S	Sch	*DOB	Approx	Age	I
Adams	Rose			19205461		V	01/20/1968	No	37	
Adams	Jamie			19205463		V	01/20/2004	No	1	

Person Identifiers

INV	Type	Number	Start Date	End Date
*				

*Ethnicity

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

*Race

- Black or African Amer
- Caribbean
- Haitian
- Native African
- Other - Black or Afri
- Alaskan Native
- American Indian
- Asian
- Chinese
- Indian

Address Phone Relationship Matrix Add/Relate Caretaker Save Cancel Close

Family Services Stage - Adams,Rose - S:29205259/C:39205260

File Options Reports Help

Case Name: Adams,Rose Case Initiation Date: 1/20/2005 WMS Case # S123456789

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

Person List

Last Name	First Name	Middle Name	Suffix	Person Id	M/S	Sch	*DOB	Approx	Age	I
Adams	Rose			19205461		V	01/20/1968	No	37	
Adams	Jamie			19205463		V	01/20/2004	No	1	

Person Identifiers

INV	Type	Number	Start Date	End Date
*				

*Ethnicity

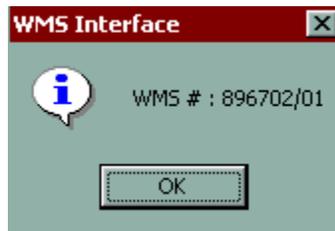
- Central American
- Caribbean
- Cuban
- Dominican
- Mexican
- North American
- Puerto Rican
- South American

*Race

- Black or African Amer
- Caribbean
- Haitian
- Native African
- Other - Black or Afri
- Alaskan Native
- American Indian
- Asian
- Chinese
- Indian

Address Phone Relationship Matrix Add/Relate Caretaker Save Cancel Close

Upon acceptance of the Application Registration in WMS, a message displays in CONNECTIONS. If the Application Registration transaction is successful, the *WMS Interface* window will display:



Note that the numbers listed after WMS # on the window shown above are the Application Registration number and Version number ("896702" and "01", respectively, in this example).

After the WMS case initiation process (including FDE) is completed, and after the nightly batch update, the new WMS Case Number displays on the **Stage Composition** tab next to the **Case Initiation Date** (CID), and the CIN(s) displays in the **Person Identifiers** section at the bottom of the tab. The **WMS App Reg** button does not display once a worker clicks on it to initiate the Application Registration process.

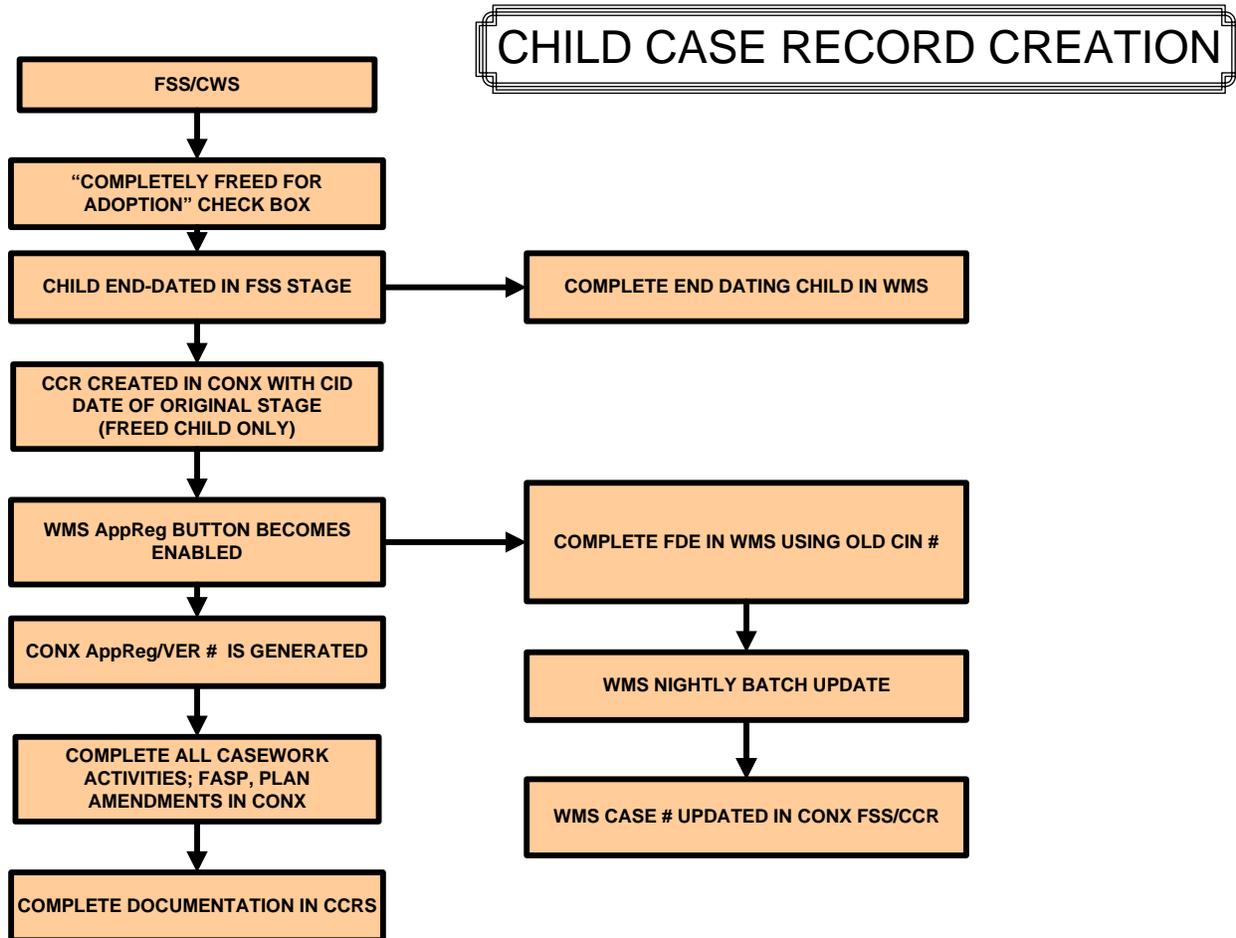
Creating a Child Case Record from CONNECTIONS

CONNECTIONS automatically creates a Child Case Record (CCR) when the Case Manager clicks on the **Completely Freed for Adoption** checkbox in a Family Services Stage. (This checkbox is located on the **Placement Information** tab of the *Tracked Children Detail* window.) All children who have been legally freed, including those who have a Permanency Planning Goal other than "Adoption" (i.e., children who will not be placed in an adoptive setting), will have a separate case record.

Before the Case Manager creates the FSS/CCR stage, the legally freed child's address should be updated, if applicable. The child's address then becomes the case address for the FSS/CCR stage.

Upon the creation of the FSS/CCR stage, the child is end-dated in the FSS/CWS. The child's CID remains unchanged with the opening of the CCR. The end-date for the child in the FSS/CWS is the date the CCR is created; this is also the start (application) date for the new WMS case. The Case Manager initiates an Application Registration from CONNECTIONS by clicking on the **WMS App Reg** button in the FSS/CCR stage. The resulting WMS Application begins the process of creating the corresponding child-only case in WMS. When the FSS/CWS stage is progressed to an FSS/CCR stage, the existing WMS case needs to be maintained. If the freed child is the only child in the WMS case, that case should be closed. If there are other children, the child who was freed for adoption should be deleted from the WMS case. In both instances, a new WMS case is then opened for the freed child using the **WMS App Reg** button that enables in the FSS/CCR stage.

The graphic below represents the process required for creating a typical Child Case Record.



Case Initiation Dates (CIDs)

The Case Initiation Date (CID) for an FSS is calculated using the earliest of four trigger dates: Date of Application, Date of Indication, Date of Court Order or Date of Placement. The CID determines the due date for the Initial and all subsequent Family Assessment and Service Plans (FASPs). During the Application Registration process, the earliest of the CID trigger dates is sent to WMS as the Application Date. As long as the WMS application is in AVAIL status and the initial FASP has not been approved, backdating a CID Trigger Date in CONNECTIONS will update WMS. If the WMS application has begun Full Data Entry, the pending case can be cancelled and the application returned to AVAIL status.

Any time one of the four trigger dates changes, the CID is recalculated until the CID is frozen, which occurs once the FASP is approved. When the CID has been recalculated, the FASP due dates are also recalculated. If the CID has yet to be established, there is an interim default due date for the Initial FASP, based upon the date the FSS was opened. Work may begin on the Initial FASP with this interim date, but it cannot be submitted until one of the four CID trigger dates is recorded by a worker or carried over from the FSI, establishing a genuine CID. The CID

is modifiable until the Initial FASP is approved. If no CID exists, the Comprehensive and Reassessment FASPs cannot be launched.



Modifying the CID after Full Data Entry:

The Case Initiation Date becomes the WMS case opening date. If the CID is modified in the FSS stage after Full Data Entry has been initiated or the WMS case has been opened, *the WMS case opening date will not be modified in WMS*. The change will be saved in CONNECTIONS, but it will not be updated in WMS. Once Full Data Entry has begun, the WMS case opening date cannot be changed without closing both the CONNECTIONS stage and the corresponding WMS case. The new FSI should be linked to the existing WMS case.

Tips:

- CID dates can only be adjusted in an FSI stage, or until the approval of the Initial FASP in an FSS. After that they cannot be adjusted; therefore, workers need to verify that they have the correct CID date before sending the Initial FASP for approval. Failure to do so may result in workers having to close and re-open the FSS stage and WMS case in order to authorize the payments in WMS.
- Workers should coordinate the closing/deletion of the child in the original WMS case and the opening of the new CCR-related WMS case in order to ensure that all payments are made.

The four trigger date fields display in the **CID Trigger Dates** section (upper right) on the *Family Assessment and Service Plan* window in CONNECTIONS (shown below):

CID Trigger Dates			
Date of Application:	<input type="text" value="7/19/04"/>	Date of Court Order:	<input type="text" value="7/19/04"/>
Date of Indication:	<input type="text"/>	Date of Placement:	<input type="text" value="7/19/04"/>

Date of Application This is the date the application for services (signed by the parent or, if the parent refuses to sign, the Caseworker) was received by the local district/ACS.

Date of Indication This view-only field displays the date the Indicated CPS Investigation Conclusion was approved.

Date of Court Order This field displays the date of the court order for services. Any worker with a role in the stage can modify this date until the approval of the Initial FASP.

Date of Placement This case-specific field reflects the date the first child initially entered a foster home or facility. Any worker with a role in the stage can modify this date until the approval of the Initial FASP.

The following rules apply for the CID Trigger Dates in the FSS stage in CONNECTIONS:

Situation	CID Trigger Date Rules
FSI to FSS – No CPS Investigation	<ul style="list-style-type: none"> • Date of Application comes over from the FSI and is not modifiable. • Date of Indication is not applicable. • Date of Court Order is modifiable until the Initial FASP is Approved or Missed; or the Comprehensive is launched, if the Initial FASP is Missed. • Date of Placement is modifiable until the Initial FASP is Approved or Comprehensive launched, if the Initial FASP is Missed.
FSI to FSS – With CPS Investigation	<ul style="list-style-type: none"> • Date of Application is modifiable in the FSS if the Application signed by CPS Worker checkbox was checked in the FSI stage. • Date of Indication is system-generated and not modifiable. • Date of Court Order is modifiable until the Initial FASP is Approved or Comprehensive launched, if the Initial FASP is Missed. • Date of Placement is modifiable until the Initial FASP is Approved or Comprehensive launched, if the Initial FASP is missed.



TIPS:

In order to send an updated CID trigger date to WMS immediately, the worker needs to perform a “zero maintenance” (make a change on the **Stage Composition** tab, reverse that change to enable the **Save** button, and then click the **Save** button).



Step by Step: Initiating a New WMS Case (Application Registration Process)

- 1 From the *Assigned Workload in CONNECTIONS*, select the appropriate FSS stage and click on the **Tasks...** button.
*The Family Services Stage window displays with the **Stage Composition** tab active.*
- 2 If the **WMS App Reg** button does not display, record and save needed changes to each individual's Last Name, First Name, Middle Initial (optional), Suffix (optional), DOB, Sex, and Social Security number (optional) in the **Stage Composition** tab and click on the **Save** button.
- 3 If the **WMS App Reg** button does not display, identify the Primary Caretaker (see the tip box at right). Make certain that an active and complete address exists for the Primary Caretaker.
- 4 Click on the **WMS App Reg** button.
The WMS Application Registration process initiates.
- 5 Print to the WMS printer. If error messages display in CONNECTIONS, follow local procedures to correct them.
*When the Application Registration process is successful, the Application Registration and Version numbers display in the **Stage Composition** tab next to the **Case Initiation Date**. These numbers display until the WMS case opening process is completed. The Clearance Report and Application Registry Report print on the WMS Printer.*
- 6 Review the Clearance Report and Application Registry Report that print on the WMS Printer.
If the reports are not available, the Application Registry Report can be viewed in WMS Inquiry—selection 12 on the WMS main menu. The Clearance Report can be reprinted using selection 4 on the WMS main menu.
- 7 If necessary, make additional changes to each individual's demographic information in the **Stage Composition** tab in CONNECTIONS; update all of the information for one person at a time and then click on the **Save** button.
A new Clearance Report prints on the WMS printer based on each save. In addition, the Version number changes based on each save (e.g. Ver #1, Ver #2, Ver #3).



To assign a role in a stage in
CONNECTIONS:

- 1 From the Toolbar, click on the **UNIT** button.
The Unit Summary window displays.
- 2 Enter the worker's Unit number in the **Unit** field.
- 3 Click on the **Search** button.
- 4 Select the worker's name from the Unit Summary grid.
- 5 Click on the **Workload...** button.
The Assigned Workload displays.
- 6 Select the appropriate stage.
*The **Assign...** button enables.*
- 7 Click on the **Assign...** button.
The Family Services Assign window displays.
- 8 Select the person in the *Available Staff* list and click on the appropriate button (e.g., **Case Mngr**) to assign that role.
- 9 Click on the **Save** button.



To identify a Primary Caretaker in
CONNECTIONS:

- 1 On the *Family Services Stage* window **Stage Composition** tab, click on the **Caretaker** button.
The Primary/Secondary Caretakers window displays.
- 2 On the *Primary/Secondary Caretakers* window, click the drop-down arrow in the **Primary Caretaker** field and select from the resulting list or check the "No Primary Caretaker" box.
- 3 Click on the **Save** button.

- 8 Complete the WMS case opening process, which consists of completion of the WK2, DIR and POS screens, in WMS.

*After the nightly batch update, the WMS Case Number displays on the **Stage Composition** tab next to the Case Initiation Date and the CIN(s) displays in the **Person Identifiers** section at the bottom of the tab. The case has now been opened in WMS. If you check the case in WMS before the overnight batch process, it will display "SF4 PENDING DATA EXISTS" at the bottom of the screen. At the top of the screen, it will display the pending status as "AT-FDE." After the batch update, the case is Active, No Pend.*



If Support staff, Examiner staff, or Data Entry Operators are assigned the responsibility for opening WMS cases, they will follow local procedures regarding the printing and distribution of the Clearance Report and Application Registry Report for the case. Make certain that you have the Clearance Report and Application Registry Report with the correct Registration and Version Numbers. If necessary, you can obtain a copy of the Clearance Report in the WMS Application Register Menu using selection "5." The case is ready for the nightly batch update.

Note: Module 2 covers these procedures in more detail.



For ACS:

ACS workers may record the WMS Non-Services CIN on the Person Identifiers window for CPS and FAD stages.

- 1 From the *Assigned Workload* in CONNECTIONS, select the appropriate stage.
- 2 Click on the **Tasks...** button.
The Task List displays.
- 3 Select **Maintain Person** and click on the **List...** button.
The Person List displays.
- 4 Select the appropriate person from the *Person List*.
- 5 Click on the **Options** menu and select the **Person Identifiers** command.
The Person Identifiers window displays.
- 6 Select **NYC NS CIN** as the identifier type in the **Type** field.
- 7 Record the CIN in the **Number** field.
- 8 Click on the **Add** button.
The added CIN information displays in the Person Identifiers grid in the upper half of the window.
- 9 Click on the **Save** button.
The Person List displays.

For FSS stages, the WMS Non-Services CIN may be recorded directly on the Stage Composition tab.

- 1 From the *Assigned Workload*, select the stage.
- 2 Click on the **Tasks...** button.
*The Family Services Stage window displays with the **Stage Composition** tab active.*
- 3 Select the appropriate person in the **Person List** grid.
- 4 In the **Person Identifiers** grid in the lower half of the tab, click in the **Type** field, click on the drop-down arrow and select **WMS #** from the resulting list.
- 5 Record the WMS Non-Services CIN in the **Number** field.
- 6 Record "WMS Non-Services CIN" in the **Comments** field.
- 7 Click on the **Save** button.

Application Registration Maintenance (ARM)

The need to make changes to stage composition, demographic data, or other case-related information in the shared fields may arise at different points in the lifespan of a case. Sometimes new information becomes available or the household composition of a family changes. These events can occur at any time in an FSS stage. However, these changes are more easily accomplished while the WMS application is still in AVAIL status, before Full Data Entry (FDE) has begun or the application has been opened as an active WMS case. If FDE has begun in WMS, the application will no longer be in AVAIL status and clicking on the **WMS Synch** button will not automatically update these changes in WMS.



Application Registration Maintenance (ARM) refers to changes made to shared fields *after* the **WMS App Reg** button is clicked but *before* FDE has begun—in other words, while the WMS application is still in AVAIL status. All ARM operations must be performed in CONNECTIONS. These would include changes to any of the information in the shared fields:

- Stage Composition (adding or end-dating a person)
- Stage Demographics (first name, last name, middle initial, suffix, sex, Social Security number, date of birth)
- Case Manager (Office/Unit/Worker ID)
- Application Date (earliest CID Trigger Date; or, if CCR, date CCR created).

After the Application Registration process has been initiated via the *Family Services Stage* window in CONNECTIONS, the App Reg/Ver number displays in the header and the **WMS App/Reg** button is no longer visible. The **WMS Synch** button will display for both local district and voluntary agency workers when there is a difference between the current values of the shared fields in WMS and CONNECTIONS.

The **WMS Synch** button also becomes *enabled* in the following instances:

- When a person is added and related to an FSS via the **Stage Composition** tab, and the *Add Person* window in CONNECTIONS displays during the relate (since all required demographic information was *not* previously recorded).
- When a person is added, but not “related” to an FSS via the **Stage Composition** tab. The information is updated in CONNECTIONS; however, a CIN needs to be established in WMS via the normal WMS CIN process (Full Data Entry). It will then be updated in CONNECTIONS via a nightly batch process.
- When end-dating an existing person is completed in CONNECTIONS (refer to the “End-dating an Individual during WMS Application Registration” section) and WMS is awaiting a batch update (status of AT/UM), workers must also complete the Recert transaction in WMS (e.g., inputting a Goal Achievement Status and POS updates).

NOTE: Under the following conditions, the **WMS Synch** button may stay visible and enabled after clicking on it:

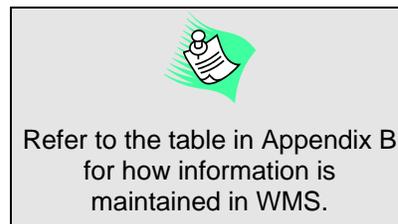
- The status of the WMS application is not AVAIL (“Available”). Wait until the WMS case is in AVAIL status and click on the **WMS Synch** button again.
- If a Non-Services WMS case has different demographic data than CONNECTIONS. In this instance, the Non-Services worker should be contacted and the discrepancies resolved.

When a local district worker clicks on the **WMS Synch** button or updates certain demographic information and clicks on the **Save** button on the **Stage Composition** tab, the ARM process is initiated. Upon successful transmission to WMS, the fields are updated and will immediately be in synch with current CONNECTIONS field values (e.g., person demographics information).

When a voluntary agency worker clicks on the **WMS Synch** button or the **Save** button, a To-Do is sent to the Case Manager; the transaction is not automatically sent to WMS. The Case Manager navigates to the *Family Services Stage* window, where s/he must review the addition and synch the case with WMS.

Maintaining Demographic Information in CONNECTIONS during WMS Application Registration

Demographic information recorded and saved in CONNECTIONS automatically transfers to WMS during the interface process. The interface allows basic demographic information about individuals listed on the *Family Services Stage* window **Stage Composition** tab in CONNECTIONS to be compared for a match in WMS. Demographics can only be recorded and modified in CONNECTIONS. Updates to shared fields are restricted from being modified in WMS, if that WMS Services application is recognized as being linked to a CONNECTIONS case.

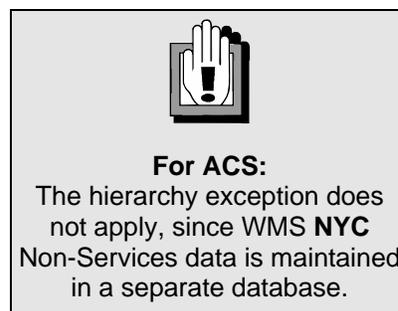


For an Application Registration, the first person entered in CONNECTIONS either from the SCR CPS Intake stage or in the Family Services Intake (FSI) appears as the Line 01 in WMS. The Primary Caretaker’s name and primary address become the WMS Case Name and address.

Once entered in CONNECTIONS, the line order cannot be changed. In WMS, the Applicant/Payee can be assigned to any line number; however, it is customary for the Line 01 person to be the Applicant/Payee. Local district conventions should be followed concerning line numbering.

The order of the stage members on the CONNECTIONS **Stage Composition** tab does not necessarily reflect the line order in WMS. Generally, the order in which the stage members are listed in an FSI stage will be the line order in WMS. For a CPS case, the order in the INV stage will be the line order in WMS.

The hierarchy of information continues to exist between WMS Services and Non-Services records. Data does not change in WMS Services if it does not agree with information in an active Non-Services case (e.g., Temporary Assistance, Medical Assistance, Food Stamps). If there are existing Non-Services



and Services cases associated with the FSS, data *can* be modified and subsequently updated in CONNECTIONS but it will not be in synch with WMS; the **WMS Synch** button (on the **Stage Composition** tab in CONNECTIONS) remains enabled until differences are reconciled. The Services worker needs to contact the WMS Non-Services worker to determine which data is correct and the Non-Services worker must make the change in the WMS Non-Services case, or the Services worker can reverse the change in CONNECTIONS.

If any of the shared Application Registration fields are modified in CONNECTIONS and then sent to WMS after Full Data Entry (FDE) has been started, but before the case has been fully opened by the batch update, the following occurs:

- The transaction to WMS is rejected.
- The following error message displays:
“WMS cannot be modified as Full Data Entry has begun. Please re-synch after the WMS Batch update.”
- The **WMS Synch** button displays and becomes enabled.

The following fields *cannot* be modified in the WMS Services case:

- Case Fields
- Center (Agency)
- Office
- Unit
- Date of Birth
- Worker
- Individual Fields
(First and Last Names, Middle Initial, Sex, SSN, Suffix)
- CIN
(Once the CIN is passed from WMS to CONNECTIONS.)

If a worker modifies information in any of the CONNECTIONS fields listed above (with the exception of the CIN, which cannot be modified in CONNECTIONS) and clicks on the **Save** button on the *Family Services Stage* window **Stage Composition** tab, changes are automatically sent to WMS as long as the WMS application is in AVAIL status.

If a worker makes demographic changes in CONNECTIONS in any stage other than an FSS (e.g., an INV stage in which an individual is in common with the FSS), the **WMS Synch** button on the *Family Services Stage* window **Stage Composition** tab becomes enabled. The **WMS Synch** button also becomes enabled if the Case Manager is reassigned. Clicking on this button or clicking on the **Save** button automatically generates a transaction to WMS to update the corresponding WMS fields as long as the WMS application is in AVAIL status.

If the Application Registration Maintenance (ARM) process was not successful, the following message *may* display:

“An error was encountered attempting to transmit this WMS Synch transaction to WMS. Please try again later.”

Adding an Individual during WMS Application Registration

Workers cannot add individuals in WMS for cases linked to CONNECTIONS. Individuals added to Services cases can only be added in CONNECTIONS. All workers assigned to the case can add individuals to the FSS. When a voluntary agency worker clicks on the **WMS Synch** button or on the **Save** button, a Task To-Do is sent to the Case Manager; the transaction is not automatically sent to WMS. The task navigates the Case Manager to the *Family Services Stage* window, where s/he must review the addition and synch the case with WMS. When the Case Manager clicks on the **WMS Synch** button to add the person to WMS, a new Clearance Report is sent to his/her WMS printer. The nightly batch update transmits CINs from WMS to CONNECTIONS; this also deletes the Task To-Do that originated from the voluntary agency worker. (For more information on adding individuals, please refer to "Application Registration Maintenance (ARM)" in Module 2.)

Note: Before adding an individual to the stage, the CONNECTIONS worker should make sure the WMS application is in AVAIL status. If the application was not in AVAIL status, the **WMS Synch** button will remain visible and enabled after being clicked. Wait until the WMS application is in AVAIL status, then click the **WMS Synch** button to synch the two systems.



A To-Do is sent to the Case Manager only when a voluntary agency worker adds or deletes (end-dates) a person from a case. That transaction is not sent automatically to WMS. As a result, the **WMS Synch** button may become enabled. For *demographic changes* completed by a voluntary agency worker, a To-Do is *not* sent to the Case Manager, and those transactions *are* sent automatically to WMS.

End-dating an Individual during WMS Application Registration

Workers cannot delete individuals in WMS for cases linked to CONNECTIONS; instead, deleting an individual is initiated from CONNECTIONS. A transaction is sent to WMS to delete the individual when an individual is end-dated in the FSS by selecting an individual on the **Stage Composition** tab, selecting **End Date Stage Involvement** from the **Options** menu, and selecting a reason on the *End Date Reason* window. These conditions are identified from CONNECTIONS information to detect that a now-end-dated individual needs to be sent to WMS for deletion. This changes the status of the individual to DEL (Deleted) on the WMS case.

When a voluntary agency worker end-dates an individual in CONNECTIONS, an Alert To-Do is sent to the Case Manager; the transaction is not automatically sent to WMS. The Case Manager must navigate to the *Family Services Stage* window through his/her *Assigned Workload*, where s/he reviews the end-dating and synchs the case with WMS. The Case Manager clicks on the **WMS Synch** button to initiate the process. (For more information on end-dating individuals, please refer to "Application Registration Maintenance (ARM)" in Module 2.)

Note: Before end-dating an individual from the stage, the CONNECTIONS worker should make sure the WMS application is in AVAIL status. If the application was not in AVAIL status, the **WMS Synch** button will remain visible and enabled



End-dating the Payee/Applicant (Line 1 person):

- 1 In WMS, select a different person to be the Applicant/Payee.
- 2 Review & Update relationship codes in WMS.
- 3 After the nightly batch update, end-date the person in CONNECTIONS who was previously listed as the Applicant/Payee in WMS.
- 4 Click on the **WMS Synch** button on the *Family Services Stage* window **Stage Composition** tab.

after being clicked. Wait until the WMS application is in AVAIL status, then click the **WMS Synch** button to synch the two systems.

Changing Demographics and Stage Composition after WMS Case Opening

Most changes to demographics and stage composition will probably occur after the WMS application has been opened as an active WMS case. Once the application has been opened as an active WMS case, changing demographic information and stage composition require additional steps beyond those described in the “Application Registration Maintenance (ARM)” section. During ARM, these transactions are completed immediately in WMS, as long as the WMS application status is AVAIL. However, once a WMS application has been opened as an active WMS case, any changes to demographics or stage composition will require additional activities in WMS in order to complete the transactions.

Follow your local district procedures for notifying WMS staff, or workers authorized to work in WMS, of these changes so that they can complete the transaction in WMS.

In addition, always check the WMS case status before adding or end-dating a person or changing demographic information. If the WMS case status is NO PEND, UM/CL or A-SFED/M when you make the changes, the changes will synch with WMS when you click on the **Save** or **WMS Synch** button. If the WMS case status is not one of those three, the changes will not synch in WMS and the button will remain visible and enabled. Wait until the WMS application is in AVAIL status, then click the **WMS Synch** button to synch the two systems.

Closing a WMS Case

When the FSS stage closes, the worker also needs to close the corresponding WMS Services case; this is *only* allowed when the CONNECTIONS stage is closed. There is no automatic closure of the WMS Services case when a CONNECTIONS stage is closed.

When the approval of an FSS closure linked to a WMS case is complete, the CCRS Indicator in WMS changes from a “Z” to a “Y.” A “Y” in the CCRS Indicator in WMS indicates that the case is known to CONNECTIONS and the CONNECTIONS stage is closed. This will allow the worker to complete the WMS Services case closing. Upon successful closing of the WMS case, a Services Authorization document is automatically sent to the WMS printer associated with the worker.



If there is also an associated Title XX-Low Income Day Care and Adult Services case open in WMS, close the case in WMS and reopen just the Title XX-Low Income Day Care and/or Adult Services cases.



Workers should not close a CONNECTIONS case when the corresponding WMS case has changes pending or is in error status. The WMS Case must be in active “No Pend” status.

Workers should complete one of the following if changes are pending:

- a. Cancel the pending transaction and/or correct the error conditions (all data in the pending transaction will be lost)
- OR-
- b. Allow the nightly batch process to update the pending transaction in WMS.

When the WMS case is in “No Pend” status, close the FSS case in CONNECTIONS.

CCRS Interface

The Child Care Review Service (CCRS) tracks compliance with State and Federal legal and case planning requirements. CCRS is the system of record for all current data entry requirements: CCRS registration, placement/movement, legal and adoption activities and Assessment and Service Plans. This requirement continues until the implementation of a future Build, when CONNECTIONS will become the system of record. Workers will continue to receive cues on the CCRS Caseload Report from CCRS for the entry of Assessment and Service Plan data. A separate CONNECTIONS report, the Family Services OCI by Worker, lists coming due and overdue FASPs (Family Assessment and Service Plans) in CONNECTIONS. The information on these reports should match.

Information entered in CONNECTIONS does not automatically update in CCRS. Therefore, for the interim period preceding the implementation of Build 19, workers must maintain data in *both* CCRS and CONNECTIONS so that data in the systems match.

The following message displays if the Case Manager is making a change in CONNECTIONS to information that pertains to CCRS:

“CCRS should be updated.”



Once Build 19 is implemented, workers will no longer need to maintain *both* CCRS and CONNECTIONS, as CONNECTIONS alone will be the system of record.

When other assigned workers make a change to information that pertains to CCRS, an Alert To-Do is sent to the Case Manager's *Staff To-Do List*.

Child Placement Information

Child placement information from CCRS is displayed (as view-only) in CONNECTIONS on the **Placement Information** tab on the *Tracked Children Detail* window (shown on next page).

The **Placement Information** tab only becomes enabled when the Program Choice of “Placement” is selected for a child. Clicking on gray box to the left of the child's name in the **Select Child** grid populates the window with the following view-only information for the selected child (if placement information is available in CCRS for the selected child):

- **Agency Name** The agency that the child is placed in.
- **Placement Date** The date the child was placed in that facility.
- **Facility ID** The Facility ID of that facility.
- **Facility Address** The address of the facility within the agency.
- **Facility Type** The type of facility.

Two additional fields on the **Placement Information** tab that are NOT populated by CCRS are the **Completely Freed for Adoption** checkbox (only displays for the Case Manager) and the **Name of Discharge Resource** field.

If there is no placement information in CCRS for the selected child, the fields in the CCRS data section of the window will be blank.

Tracked Children Detail - Adams,Rose - S:29205259/C:39205260

File Help

Program Choice/PPG **Placement Information** Associate Worker Removal Information

Select Child:

Child	Age	CaseWorker
Adams,Jamie	1	

CCRS/Connections Placement Data as of 1/02/2006 10:45:47 AM

Agency Name: Sean's Children and Family Center

Placement Date: 12/23/2005

Facility ID: 152321421

Facility Address: 40 North Pearl Street
Albany, NY 12243

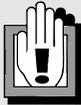
Facility Type: Foster Boarding Home

Name of Discharge Resource: _____

Completely Freed for Adoption:
(Creates Child Case Record)

Save Cancel

Close



The Placement Date is based on the M910 (Movement Activity), not L100 (Petition to Place in Legal Custody of the Commissioner).

Removal Information

Information from CCRS regarding the Date Certain and the last legal activity pertaining to permanency is displayed (as view-only) in CONNECTIONS on the **Removal Information** tab on the *Tracked Children Detail* window. This tab provides for the tracking of information related to the physical removal of a child who is placed in foster care or direct care with a relative or other suitable person under Article 10 of the Family Court Act.

Any worker with a role in the stage can access this tab; however, it is only enabled when at least one child in the stage has a Program Choice of "Placement" or "Non-LDSS Custody," or historical removal information exists for the stage. This tab is view-only for closed stages. For stages closed prior to the implementation of Build 18.7, the **Removal Information** tab is disabled.

The **Activity Date** and **Next Permanency Hearing Date Certain** fields on the **Removal Information** tab are populated from CCRS during a nightly interface that pulls information from CCRS into CONNECTIONS. If the information is not recorded in CCRS, these fields do not populate and the worker will not receive necessary alerts. The Permanency Hearing Date Certain applies only to Article 10, completely freed and voluntarily placed children. These two view-only fields display next to the **Select Child** grid; upon selecting a child from the grid, these fields populate with the applicable dates for that child:

Activity Date The date of the last legal activity pertaining to permanency (e.g., date of removal, approval of voluntary placement, date of last permanency hearing).



The **Removal Information** tab is *not* enabled if no child in the stage has a Program Choice of "Placement" or "Non-LDSS Custody," or no historical removal information exists for the stage.

**Next
Permanency
Hearing Date
Certain**

The date of the next permanency hearing for a child (Date Certain), which is set at each relevant court hearing. If no Date Certain has been entered into CCRS, this field is blank.

**<Hearing
Type>**

This field name includes either the word “Initial” for the first permanency hearing or “Subsequent” for all successive permanency hearings.

Various alerts to assigned workers for Service Plan Reviews/Consultations and Permanency Hearing Report submission are generated based on the Date Certain.

The nightly batch interface retrieves all the Dates Certain and CINs from CCRS of all individuals having their Dates Certain entered/updated that day and brings them forward into CONNECTIONS. CONNECTIONS compares the Date Certain to the Activity Date (for an initial permanency hearing) recorded on the **Removal Information** tab, or to the date of the prior hearing (for a subsequent permanency hearing) recorded in CCRS. If the Date Certain does not fall within the appropriate timeframes, the worker receives an Alert To-Do on his/her *Staff To-Do List*. This message does *not* prevent the worker from completing any work in CONNECTIONS; it simply alerts the worker that the Date Certain does not comply with the timeframes made effective by the Permanency Bill.



For legal activities dated before 12/21/2005 (before the implementation of Build 18.7), workers *must* enter the date of the next hearing in the Modifier D field, or the Date Certain will not be populated, and no alerts based on this date will be generated, in CONNECTIONS.

Except in the case of children placed under Article 3 or 7 petitions, the CCRS Caseload Report will no longer alert workers to file petitions for permanency hearings. Instead, CCRS cues for the following, which are included in the report:

- Initial permanency hearing (714)
- Subsequent permanency hearings (611)
- Initial permanency hearing after a child is completely freed for adoption (523)

Foster Care Issues

Child foster care placement information from CCRS is displayed in CONNECTIONS on the **Location of Child** tab on the *Appropriateness of Placement* window. This window is accessed from the *Family Assessment and Service Plan* window by selecting the **Appropriateness of Placement** sub-node located beneath the **Foster Care Issues** node on the FASP Tree. Information on the **Location of Child** tab is generated from CCRS immediately upon being updated in CCRS. The information can be modified directly in CONNECTIONS by selecting a child in the **Select Child** grid on the **Location of Child** tab, and clicking on the **Edit** button; this opens the *Location Detail* window. Any changes made in this window will update the information in CONNECTIONS, but not in CCRS. To avoid needing to record the information in both systems, record the Location Detail information in CCRS, then re-open the *Location Detail* window in CONNECTIONS. The system interface updates CONNECTIONS with the CCRS information.

If CCRS is not available, the following message displays:

“CCRS data is not currently available. Try again later.”

Key Dates

As a result of implementation of Build 18.7, the *Key Dates* window no longer receives updates from CCRS and instead displays the last permanency-related data received from CCRS prior to the implementation of Build 18.7.

The following information displays on the **Key Dates** tab, which is accessed from the *Family Services Stage* window and only enabled for stages closed prior to the implementation of Build 18.7:

- CCRS Data as of
- Children in Placement
- ASFA Day 1
- ASFA Day 1 Modifier
- TPR Decision Due
- Next Permanency Petition Filing Due Date
- Next Permanency Hearing Due Date
- Petition Type
- Hearing Type

Note: These fields display the last permanency-related data received from CCRS prior to the implementation of Build 18.7 and are not current information.



Refer to the Placement Key Dates module in the *CONNECTIONS Case Management Step by-Step Guide* for more details.

Updates

Daily Batch Update

The following WMS-CONNECTIONS update is executed daily to update CONNECTIONS cases with appropriate data from the WMS Services case:

Open/Re-open (TX-TYPE = 02 or 10) Transactions on WMS cases known to CONNECTIONS

The CONNECTIONS Family Services Stage is updated with the newly created WMS Case Number and CINs for all individuals in the linked case.

The Person Identifiers (PIDs) of all the individuals in the CONNECTIONS FSS are updated with the appropriate WMS Client Identification Numbers (CINs). If the WMS CIN is different from the CONNECTIONS CIN, the CONNECTIONS CIN is end-dated and a new CIN is associated with the person in CONNECTIONS.

Recertification (TX-TYPE = 06) Transactions

Recertification transactions on WMS Services are updated to cases known to CONNECTIONS in which an individual has been added.

The PIDs of all the individuals in the CONNECTIONS FSS are updated with the appropriate WMS CINs assigned as a result of the WMS Clearance and the CIN assignment on WMS.

Person Demographic Updates

Person demographic updates in WMS Non-Services cases will automatically update person demographic information in WMS Services cases, and the corresponding person demographic information in CONNECTIONS will be updated via the nightly batch. An Alert To-Do is sent to the Case Manager's *Staff To Do List* notifying him/her about the change in CONNECTIONS data as a result of a change in WMS Non-Services data.

The PIDs linked to CINs updated via the Non-Services case (with Services involvement) are updated in CONNECTIONS.

The following fields are updated:
Name, Sex, Date of Birth and SSN.

A CIN that is assigned via the batch interface may not be changed through the **Stage Composition** tab on the *Family Services Stage* window or the *Person Identifiers* window in CONNECTIONS.

Nightly Batch Update

The following events are a part of the nightly batch update between WMS and CONNECTIONS:

Case Opening Transactions These transactions are cases in which the Application Registration process was initiated in CONNECTIONS. The batch update closes the loop by updating the FSS in CONNECTIONS with the assigned WMS Case Number, as well as with the all of the CINs assigned during the Full Data Entry (FDE) process.

Recerts (Individuals added to or deleted from WMS case) WMS Recerts are transactions in which CONNECTIONS added a person or end-dated a person. The CIN assigned in WMS for the newly added person is sent to CONNECTIONS.

Non-Services (Hierarchy) The demographic change to the individual in a Non-Services case is modified in the Services case and is updated in CONNECTIONS via the nightly batch.

Remember, the hierarchy of information continues to exist between WMS Services and Non-Services records. Data does not change in WMS Services if it does not agree with information in an active Non-Services case. If there are existing Non-Services and Services cases associated with the FSS, data *can* be modified in CONNECTIONS but it will not be in synch with WMS. The **WMS Synch** button will become enabled in CONNECTIONS and when clicked, a message will display indicating that the Non-Services worker needs to be contacted to make the appropriate change to the Non-Services WMS case. The Services worker needs to contact the WMS Non-Services worker to determine which data is correct. Either the Non-Services worker makes the appropriate change in the WMS Non-Services case or the Services worker changes the FSS in CONNECTIONS to agree with the Non-Services data. The **WMS Synch** button no longer displays once the changes have been made in the WMS Non-Services case and CONNECTIONS is updated via the batch.

CIN-UNDUP transactions When a CIN is unduplicated in WMS, the Services case in which it is involved appears on the WMS Daily Audit file. The unduplicated CIN is reflected in CONNECTIONS. (**Note:** A more detailed description of CIN UNDUP transactions is given in the "Authorization Change Form (ACF)" section in Module 2.)

Once these WMS screens are successfully completed, the confirmation message, "Authorization report to be printed," is displayed; this message includes a case number and a pending status allowing for a WMS batch update. The updates are then sent to CONNECTIONS during a batch update.

Module 2: WMS Interface and Data Entry

The purpose of this chapter is to provide an overview of staff procedures for synchronizing data between WMS and CONNECTIONS. The interface affects how changes in shared fields are performed in CONNECTIONS and in WMS. A link is established by the interface between the CONNECTIONS Family Services Stage and the corresponding WMS application or open WMS Services case. Once the registration of a WMS application is initiated by CONNECTIONS, changes to any of the shared fields in CONNECTIONS must be synchronized with the corresponding data in WMS. However, procedures by which this synchronization is maintained can vary according to:

- the pending status of the WMS application or case;
- whether the worker making the changes is a voluntary agency or local district worker;
- whether participants in the CONNECTIONS stage are also involved in a Non-Services case.

The table below gives an overview of how the interface affects maintaining shared field information in CONNECTIONS, depending on the status of the WMS application/case.

Task	Application Phase (not yet a WMS case)		Case Phase (FDE complete, batch update complete, WMS case is Active, No Pend)	
	CONNECTIONS Activity	Result in WMS	CONNECTIONS Activity	Result in WMS
Change demographics	App/Reg Version # updated	App/Reg Version # updated; new Clearance Report generated	Demographics updated	Demographic information is updated and a new authorization is generated (If demographics conflict with an associated open Non-Services case, no change.)
Add/end-date stage members in CONNECTIONS	App/Reg Version # updated	App/Reg Version # updated; new Clearance Report generated	Members added and/or end-dated	If adding, a new Clearance Report is generated. Either transaction puts the WMS case in pending status (UM/CL for adds, A/SFED-M for deletes) until WMS data entry, batch processing and/or reconciliation of differing

Task	Application Phase (not yet a WMS case)		Case Phase (FDE complete, batch update complete, WMS case is Active, No Pend)	
	CONNECTIONS Activity	Result in WMS	CONNECTIONS Activity	Result in WMS
				demographics (if an add transaction has Non-Services involvement) is complete.
Change Application Date/CID **	Change or add appropriate CID Trigger Date on FASP window (Note: the initial FASP must not yet be approved.); App/Reg Version # updated	App/Reg Version # updated; WMS Application Date updated	Close CONNECTIONS Family Services Stage and re-open with correct CID	CCRS Indicator for case changes from "Z" to "Y"; need to close WMS case and re-open with appropriate application date
Reassign Case Manager	WMS Synch button is enabled; any worker assigned to the stage must click; App/Reg Version # updated	Office/Unit/Worker code is updated after WMS Synch button is clicked; new Application Registry Report generated	WMS Synch button is enabled; any worker assigned to the stage must click	Office/Unit/Worker code is updated after the WMS Synch button is clicked
Change WMS Case Name	Not allowed	Not allowed	Not allowed in CONNECTIONS	Allowed
Change WMS Case Number	Not allowed	If FDE has begun, cancel FDE; wait for batch update processing; restart FDE next day with new case	Must close FSS and open new FSS.	Must close original WMS case. Use new case number when opening the new WMS case (from newly created FSS/WMS application)

** The Date of Application, which appears in the **CID Trigger Dates** field of the FASP window, cannot be changed in the FSS stage if it was recorded in the FSI.

Impact of Interface on WMS Transactions

The interface impacts procedures for case openings, data entry, recertification, undercare maintenance and case closings in WMS. The interface requires all case openings, demographic changes and case closings for WMS cases with Direct Services of 08 (Foster Care), 17 (Protective), 25 or 26 (Preventive) to be initiated in CONNECTIONS. For these services, transactions done on WMS screens (e.g. WK2, DIR and POS screens) are only permitted if the WMS case is linked to CONNECTIONS. A CCRS indicator of "Z" (active CONNECTIONS

stage) or “Y” (services stage formerly active but currently closed in CONNECTIONS), in the field labeled “CCRS” on WMS data entry screen WSEWK1 (demographic data) indicates the link in WMS to a corresponding CONNECTIONS Services stage. The indicator can be viewed through:

- WMS Inquiry on screen 12 from the WMS menu;
- Application Inquiry, Selection A (“Application”)
 - Screen WINQ70, in the field labeled “CCRS”; and
- Case Inquiry, Selection B (Case Make-up/Indivs”)
 - Screen WINS07, in the field labeled “CCRS”; and
- the LDSS-2970, in the field labeled “CCRS.”



WMS errors associated with Interface:

Error Number: 272

Cause: Individual demographic changes cannot be made in WMS.

Remedy: Make demographic changes on cases linked to CONNECTIONS in CONNECTIONS.

Error Number: 273

Cause: Changes to the “CCRS” indicator cannot be made in WMS for cases known to CONNECTIONS.

Remedy: Do not attempt changes to the “CCRS” indicator in WMS for cases known to Connections. If the indicator is incorrect, notify the Enterprise Help Desk at 1-800-697-1323.

Error Number: 540

Cause: Authorization of Child Welfare Services (DIR service codes 08, 17, 25 or 26) cannot be done on cases not known to CONNECTIONS.

Remedy: Remove the DIR services of 08, 17, 25 or 26 and open the case in CONNECTIONS.

Application Registration

Registering an application for services with WMS must be initiated in CONNECTIONS. During intake, information from the Common Application (LDSS-2921) is recorded in the Family Services Intake (FSI) stage in CONNECTIONS, including stage participants' demographic data and the date the application was received by the local district. When the local district approves the FSI, the FSI is stage progressed to a Family Services Stage (FSS). Registration of the application in WMS is initiated in the FSS stage.

During stage progression from the FSI, CONNECTIONS will system-populate the information below into the new FSS stage. This information will be sent to WMS when the Application Registration process is initiated:

Stage participants and demographic information

Demographic information includes:

- First name
- Last Name
- Middle Initial
- Suffix
- Sex
- Date of Birth
- Social Security number

Line Order

The first person entered in CONNECTIONS—either from the State Central Register CPS Intake stage or in the Family Services Intake (FSI)—is sent to WMS as the Line 01 (“Applicant/Payee”) in WMS.

Once entered in CONNECTIONS, the line number of a person cannot be changed in WMS. In WMS, the Applicant/Payee can be assigned to any line number; however, it is customary for the Line 01 person to be the Applicant/Payee. Local district conventions should be followed concerning line numbering (i.e. Line One equal to the Applicant/Payee, and subsequent line numbers from oldest to youngest child).

Note: The order in which the stage composition *displays* in the Family Services Stage window **Stage Composition** tab does not necessarily reflect the order in which the stage composition was *entered* on the **Stage Composition** tab.

Date LDSS Received Application signed by Parent/Client (Application Date)

This date must be verified prior to sending the FSI for approval and progressing to an FSS. When the stage is progressed to an FSS, it is one of four possible CID Trigger Dates, the earliest of which is used during WMS Application Registration to determine the WMS case opening date. Please verify CID Trigger Dates on the FASP tab *prior* to clicking on the **WMS App Reg** button. (For more information about CID Trigger Dates, see “Case Initiation Dates” on page 13.)

Finally, the Primary Caretaker, identified in the *Primary/Secondary Caretaker* window in CONNECTIONS, and the Primary Caretaker's address must be recorded in the Stage Composition. All of the above-named data is required before initiating the Application Registration process. (Social Security numbers for each stage participant should be recorded, if available, although they are not required for registering the application in WMS.)

The following case-level data is also sent to WMS when the Application Registration process is initiated:

- Center/Office
- Unit/Worker
- District
- Service Indicator
- Case Type=40 (Services)
- CONNECTIONS Primary Caretaker (WMS Case Name)
- Primary Caretaker's (primary) address

WMS Inquiry

A WMS Inquiry for open Services and/or Non-Services cases associated with the stage participants should be conducted before Full Data Entry in WMS begins. It is advisable to review demographic information for case members who may already be on active, closed or denied Services or Non-Services cases *prior to sending the Application Registration information over to WMS* for purposes of reconciliation prior to App Reg. The inquiry may be conducted at any point after the Common Application (LDSS-2921) is completed and signed (consult your local district procedures).

If stage participants are known to WMS, the demographic information on the application does *not* match, and there is...

Non-Services case involvement in WMS:

The Non-Services worker should be contacted to reconcile the demographic information.

Services case involvement in WMS:

The Case Manager should be contacted if the Services case is in the same county. A decision must be made on whether to close the new FSS and/or update the existing case. If the Services case is in a different county, differences in demographic information should be reconciled.

Note: As a consequence of the information hierarchy in WMS—in which Non-Services data has priority over Services data in the system—if there is a discrepancy between an individual's demographic information in the CONNECTIONS case and an *open* Non-Services case, the Non-Services data will not change in WMS and the two records will remain out of synch. The out of synch condition will not prevent an application from being registered, but discrepancies must be resolved before WMS FDE is completed. If the discrepancy is between the new CONNECTIONS stage and a closed or denied WMS case, the new CONNECTIONS data will overwrite the WMS data, and a warning (#713 - #717) will appear on the SFED/T.



No Primary Caretaker

If there is no Primary Caretaker, "No Primary Caretaker" must be selected in the *Primary/Secondary Caretaker* window. (Note: Not required for FSS/CCR)

If the stage is a CCR, or if the No Primary Caretaker checkbox is selected, the address used for Case Address in WMS defaults to the Primary Address of the first individual in the case.

Follow local district procedures for contacting the appropriate Case Manager and for resolving discrepancies. If demographic data in CONNECTIONS must be modified after discrepancies are resolved, follow normal CONNECTIONS procedures for maintaining demographic data. However, if the Application Registration process in WMS has already been initiated by clicking the **WMS App Reg** button, see “Application Registration Maintenance (ARM)” on page 38 for procedures on updating the information.

WMS App Reg and WMS Synch Buttons

When all shared-field information is entered in CONNECTIONS and the Primary Caretaker is defined in the *Primary/Secondary Caretaker* window, the **WMS App Reg** button appears. The appearance of this button indicates that the CONNECTIONS stage is ready for registration in WMS. **Please verify the CID**

Trigger Dates on the *Family Assessment and Service Plan* window in CONNECTIONS prior to clicking on the WMS App Reg button. The earliest of those dates is sent to WMS as the “Application Date.” Verify that the earliest date is when the WMS case should start (i.e. billing begins). Follow local district procedures for who may click on the **WMS App Reg** button and when it may be clicked. Once the CONNECTIONS stage has been linked to a WMS application by clicking the **WMS App Reg** button, any changes made to shared fields must be updated in CONNECTIONS for the corresponding WMS application using either the **Save** button or the **WMS Synch** button on the *Family Services Stage* window.

When the **WMS App Reg** button on the *Family Services Stage* window of the FSS is clicked, the following events occur:

- An Application Registry Report is sent to the WMS printer. Check the information on these reports for accuracy against the Common Application (LDSS-2921).
- A Clearance Report is sent to the WMS printer. The Clearance Report is used to determine, for purposes of CIN assignment, if individuals are known to WMS.
- WMS returns Application Registry and Version numbers to CONNECTIONS. These numbers display in the upper right corner of the *Family Services Stage* window.

In addition, the interface sends the following stage composition information from the FSS to WMS when the **WMS App Reg** button is clicked:

- Center/Office
- Unit/Worker
- Service Indicator
- WMS Application date (for CWS cases, the earliest of 4 CID Trigger Dates; if CCR, the date the CCR was created)
- Case Type=40 (Services)
- Case participant demographic information:
Primary Caretaker’s Name
Primary Caretaker’s Address (Primary)

The application has now been registered in WMS.

The above information automatically populates the WSEWK1 screen. However, it cannot be modified in WSEWK1: any changes to demographic information on shared fields *must* be done in CONNECTIONS. *Any differences between the Application Registry report and the Common Application should be resolved before initiating Full Data Entry in WMS.* (If the case has already



The **WMS App Reg** button will only appear to local district workers, never to voluntary agency workers.

been opened in WMS, see “Authorization Change Form (ACF)” on page 49 for procedures on updating the shared-field data.)

Once this link between CONNECTIONS and WMS has been established, information updated and saved in any of the shared fields will be updated in WMS upon clicking the **Save** or **WMS Synch** buttons. However, there are three situations in which this information will *not* update in WMS when the **Save** or **WMS Synch** button is clicked:

- The WMS case is in a pending or error status.
- A voluntary agency worker adds or end-dates a person from the stage:

When a voluntary agency worker saves these changes, the information is *not* sent to WMS. Instead, an Alert To-Do is sent to the Case Manager. The information is sent to WMS when the Case Manager clicks on the **WMS Synch** button.

- There is a discrepancy between the information entered in CONNECTIONS and the information in an open Non-Services case.

In this event, the **WMS Synch** button will remain enabled after being clicked. Because the hierarchy of information between Services and Non-Services cases will not permit discrepant information in CONNECTIONS to over-write information in a Non-Services case, CONNECTIONS and WMS will remain out of synch until the discrepancies are resolved. See the tip box to the right.

The **WMS Synch** button may enable, even if you’ve made no changes to the FSS, when:

- another worker makes a change to another stage linked to the FSS in CONNECTIONS. The new information will automatically update in the FSS and the **WMS Synch** button will enable, because the new information is out of synch with the WMS application or case.
- a change is made to a related Non-Services case in WMS. The new information will automatically update the WMS Services case, but will *not* update in the linked CONNECTIONS stage. The WMS Services case and the linked CONNECTIONS stage will be out of synch and an Alert To-Do will be sent to the Case Manager.



WMS Synch Button

If the **WMS Synch** button does not disable after being clicked, there are three possible causes:

- 1.) The WMS case is in Pending or error status.
*Correct errors or wait for batch update processing to be completed, or cancel the pending transaction in WMS, then click on the **WMS Synch** button.*
- 2.) There is a conflict with information in a Non-Services case.
The Non-Services worker should be contacted and the discrepancies resolved.
- 3.) A voluntary agency worker has added/end-dated a person in the stage.
*The Case Manager is the only worker who can press the **WMS Synch** button.*

Application Withdrawal

Closing a CONNECTIONS FSS stage prior to WMS case opening will cause the application to be withdrawn if the WMS application is "AVAIL" but not yet in FDE-COMP status. If the WMS application has been advanced to FDE-COMP, it may not be withdrawn in WMS.

WMS Services applications in "AVAIL" status are automatically withdrawn from the system 90 days after the last maintenance performed on that application in CONNECTIONS. Once the application is withdrawn, it will no longer be available; therefore it is important that the WMS case be opened within this 90-day window.

If a Clearance Report fails to print or is otherwise unavailable, a copy may be requested from the WMS Application Registration menu (Selection 04 from the WMS menu).

Clearance Evaluation and CIN Assignment

Application Registry Report

When the **App Reg** button is clicked, the WSEWK1 screen is automatically completed in WMS, and the Application Registry Report and Clearance Report are generated. Information on the Application Registry Report should be identical to information on the Common Application (LDSS-2921). If the information matches, make a decision on assigning CINs in WMS based upon review of the Clearance Report, and then proceed with Full Data Entry. If the Application Registry Report contains inaccuracies in the shared fields, the information must be corrected in CONNECTIONS, not in WMS.

- As long as Full Data Entry has not commenced or already been completed, changes made in CONNECTIONS will update the WMS application when either the **Save** or **WMS Synch** button is clicked.
- Demographic information in the FSS **Stage Composition** tab must be updated and saved one person at a time.
- Every time the **Save** button is clicked, a new Application Registry Report and Clearance Report will be generated.

See "Application Registration Maintenance (ARM)" on page 38 for procedures on correcting shared field data in CONNECTIONS.

CIN Clearance

The purpose of the Clearance Report is to compare the individuals' data in the stage against existing records in WMS. If no match is found for a person, "ASSIGN" is written in the appropriate line of Section 3 in the Common Application (LDSS-2921). During Full Data Entry, "ASSIGN" will be entered on the WSEWK2 screen. WMS will then assign a CIN, which will be viewable (once WSEWK2 is completed and transmitted) on the WSUDIR screen.

If a person is known to exist in WMS, the person's CIN is recorded in the appropriate line of Section 3 of the Common Application (LDSS-2921). During FDE, the CIN will be recorded on the WSEWK2 screen and will be viewable on the WSUDIR screen. If the person is/was involved in a Non-Services case AND the demographic data for that person in CONNECTIONS does not agree with the information in WMS, *the Non-Services CIN must still be used in order to avoid creating a duplicate CIN*. The *demographic* information in CONNECTIONS, however, will not change if the person is in an *active* WMS Non-Services case. This results in an out of synch condition that the Services worker and the Non-Services worker must resolve. If a person is

applying in another case, the Clearance Report will produce the App/Reg version number; the app/reg number and line number should be recorded so the person will be assigned the same CIN in both cases.

Application Registration Maintenance (ARM)

The need to make changes to stage composition, demographic data, or other case-related information in the shared fields may arise at different points in the lifespan of a case. Sometimes new information becomes available or the household composition of a family changes.

Application Registration Maintenance refers to changes made to shared fields *after* the **WMS App Reg** button is clicked but *before* FDE has begun. All ARM operations must be performed in CONNECTIONS. These would include changes to any of the information in the shared fields:

- Stage Composition (adding or end-dating a person)
- Stage Demographics (first name, last name, middle initial, suffix, sex, Social Security number, date of birth)
- Case Manager (Office/Unit/Worker ID)
- Application Date (earliest CID Trigger Date; or, if CCR, date CCR created).

Before Application Registration in WMS has begun, changes to stage composition (adding or end-dating a person) can be made following normal CONNECTIONS procedures, without concern for keeping the WMS application synchronized. Once the **WMS App Reg** button is clicked, WMS Application Registration has begun; Registry and Version numbers appear on the *Family Services Stage* window and any changes to stage composition or demographic data will now require synchronizing with WMS through Application Registration Maintenance. (If the WMS case number appears on the *Family Services Stage* window, changes to the stage composition will require a recertification transaction [06] in WMS. Demographic changes will initiate an undercare change transaction [05] in WMS. See “Authorization Change Form [ACF]” on page 49.)

Since the Registration and Version numbers will appear on the *Family Services Stage* window from initial registration of the Application until the WMS case is opened, there is no way to tell from CONNECTIONS whether FDE has begun or not. *Therefore, before performing ARM, check the status of the WMS application using WMS Inquiry.* The application should be in “AVAIL” status (available), *not* in “FDE-COMP.”

If WMS FDE is complete and the pending data status is AT/FDE (“Awaiting Transmission after FDE”) or FDE/ERR (“Awaiting Error Correction after FDE”), any changes made in CONNECTIONS to the shared fields will NOT update in WMS when the **Save** or **WMS Synch** button is clicked. (See the tip box at right.) The pending transaction in WMS may need to be cancelled before performing ARM. (See “Cancelling a Pending Transaction for an Open WMS Case” on page 50.) After overnight batch processing, the WMS application status will revert to “AVAIL” and ARM can proceed.



WMS Synch Button

If the **WMS Synch** button does not disable after being clicked, there are three possible causes:

- 1.) The WMS case is in Pending or error status. *Correct errors or wait for batch update processing to be completed, or cancel the pending transaction in WMS, then click on the **WMS Synch** button.*
- 2.) There is a conflict with information in a Non-Services case. *The Non-Services worker must be contacted and the discrepancies resolved.*
- 3) A voluntary agency worker has added/end-dated a person in the stage. *The Case Manager is the only worker who can press the **WMS Synch** button.*

If the WMS application status in WMS is “AVAIL,” changes made to the shared-field data in CONNECTIONS will be sent to WMS. The table below is a “Quick Reference” to the types of changes and results when the Application is pending (case not yet opened) in WMS. Note the distinctions between transactions that will update WMS upon clicking a **Save** button, versus those transactions that require clicking the **WMS Synch** button in order to update WMS.

Type of Change (while in Application Registration)	Procedure	Result
Add Person	<p>Perform a CONNECTIONS Search from the <i>Add/Relate Person</i> window:</p> <ul style="list-style-type: none"> • If no match is found: <ol style="list-style-type: none"> 1 click on the New button; 2 complete the required information in the <i>Add Person</i> window; and 3 click on the Save button in the <i>Add Person</i> window. • If a match is found AND upon clicking on the Relate button the <i>Add Person</i> window does NOT appear: <ol style="list-style-type: none"> 1 you are returned to the Stage Composition tab. • If a match is found AND upon clicking on the Relate button the <i>Add Person</i> window DOES appear: <ol style="list-style-type: none"> 1 complete all required fields and verify/modify demographic information; and 2 click on the Save button on the <i>Add Person</i> window. 	<p>The person will be saved to the CONNECTIONS stage and the WMS application will update.</p> <p>A new Clearance Report and Application Registry Report will be printed.</p> <p>The WMS application’s version number will increase by 1 for each added/related person. (Version #2, #3, etc.)</p> <p>The person will be saved to the CONNECTIONS stage and the WMS application will update.</p> <p>A new Clearance Report and Application Registry Report will be printed.</p> <p>The WMS application’s version number will increase by 1 for each added/related person. (Version #2, #3, etc.)</p> <p>The WMS Synch button will enable.</p> <p>Click on the WMS Synch button and the person will be updated to WMS.</p> <p>A new Clearance Report and Application Registry Report will be printed.</p> <p>The WMS application’s version number will increase by 1 for each Save. (Version #2,#3,etc.)</p>

Type of Change (while in Application Registration)	Procedure	Result
End-date Person	<p>Select the person to be end-dated in the Person List grid.</p> <p>Select the End Date Stage Involvement command from the Options menu and identify a reason in the <i>End Date Reason</i> window.</p> <p>Click on the Save button.</p>	<p>After saving, the person will be removed from Person List and deleted in WMS.</p> <p>A new Application Registry Report will be printed.</p> <p>The WMS application's version number will increase by 1 for each Save. (Version #3,#4,etc.)</p>
Change Demographics	<p>Make changes in the Stage Composition tab one person at a time.</p> <p>Click on the Save button as changes are made for each person.</p>	<p>After each click on the Save button, the changes will be saved to CONNECTIONS and WMS will be updated.</p> <p>After each click on the Save button, a new Clearance Report and Application Registry Report will be printed.</p> <p>The WMS application's version number will increase by 1 for each Save. (Version #4,#5,etc.)</p>
Re-Assign Case Manager	<p>Select the new Case Manager on the <i>Family Services Assign</i> window.</p> <p>Click on the Save button on the <i>Family Services Assign</i> window.</p>	<p>An Alert sent to the new Case Manager.</p> <p>The WMS Synch button enables in <i>Family Services Stage</i> window.</p> <p>Click on the WMS Synch button.</p> <p>New Case Manager saved to WMS (Office/Unit/Worker ID are updated).</p>
Case Initiation Date (WMS Application Date)	<p>For an FSS/CWS stage, enter the new CID Trigger Date on FASP tab of the FSS.</p> <p>Perform zero maintenance in one of the shared fields (e.g. add then delete a letter in last name).</p> <p>Click on the Save button to save the zero maintenance "change."</p>	<p>The WMS Application Date will update automatically in WMS.</p> <p>The application Version number will update.</p>

Note: Changes to the Case Initiation Date for an FSS/CWS stage (the earliest of the four CID Trigger Dates on the FASP tab of the FSS) can only be made in the FSS until the Initial FASP is approved, OR (if the Initial FASP was missed) until the Comprehensive FASP is launched. This date becomes the WMS case opening date; *after FDE, this date cannot be changed in WMS without closing both the CONNECTIONS stage and the WMS case.* You can only back date the application date up to 180 days from the current system date. Similarly, the WMS case cannot be opened if the **App Reg** button is clicked more than 180 days after the Case Initiation Date. (Two districts are exempt from the 180-day rule.)



When an FSS/CCR stage is created, the interface will end-date the child from his/her CWS stage, but in the new FSS/CCR, the CID displayed will be the CID of the original CWS stage. However, the Case Opening Date for the new child case in WMS will be the date the CCR was created.

Remember to delete the child from the WMS case (or close the WMS case if it is a child-only case) prior to opening the new WMS case.

Full Data Entry (FDE) and Case Opening

WMS defines the event that *initiates* FDE as the transmittal of Registry and Version numbers on the WSEMNU screen; once these numbers are entered and the screen transmitted, FDE has begun. WMS defines the event that *completes* FDE as successful completion of the overnight batch processing following transmittal of *at least* the completed WSEWK2 screen. It is customary to open the WMS case (complete the WSUDIR and, if needed, the WSUPOS screens) during the same WMS session in which the WSEWK2 screen is completed; however, WMS will consider FDE completed upon successful processing of the WSEWK2 screen alone.

If FDE has *begun* and you need to make changes to any of the shared fields, you'll need to either wait for the WMS case to open or cancel the pending WMS transaction(s) for FDE, wait for overnight batch processing to be completed and then perform Application Registration Maintenance.

If the WMS application is still in “AVAIL” status, you may make changes to any of the shared fields in CONNECTIONS. The data in the pending application will be updated (the app/reg version number will increase and a new Application Registry Report will be printed). If the WMS case is already open (WK2, DIR and, if needed, POS screens completed and batch processed), any changes to stage composition (additions, end-dates) or demographics in CONNECTIONS will require recertification/undercare maintenance in WMS (see “Authorization Change Form (ACF)” on page 49 for recertification/undercare maintenance procedures). A WMS error may also be generated. (See “Correcting Full Data Entry Errors” on page 47 for what to do if an error is generated.)

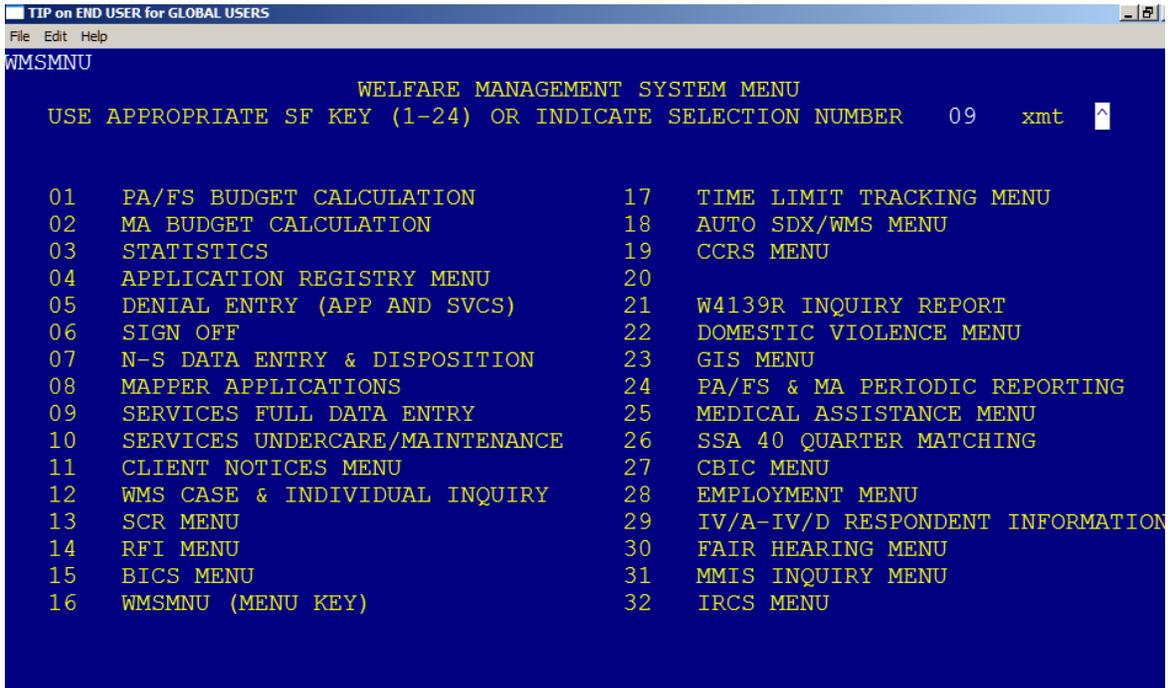
Once the WMS case is opened the Registry and Version numbers in the upper right corner of the *Family Services Stage* window will be replaced by a WMS Case Number. (This number, as well as the CIN for each individual in the stage, is returned to CONNECTIONS during the batch update process following the acceptable entry, transmission and batch processing of DIR.) However, CONNECTIONS will not indicate whether FDE has *begun* or not: once Application Registration is initiated by clicking the **WMS App Reg** button, the Registry and Version numbers will remain on the *Family Services Stage* window until FDE, WMS case opening and overnight batch processing are completed. Before making changes to stage composition or demographic data, be sure to check the status of the record (application status or pending record status) using WMS Inquiry to assure that either the application is in AVAIL status or the case is in Active, No Pend status. (See the tip box above.)



The WMS application/case status should always be checked before making changes to shared fields in CONNECTIONS—the system can't process WMS transactions and simultaneously accommodate changes to demographic information or stage composition. If changes are made in CONNECTIONS while the WMS application or WMS case is not in the appropriate status, the **WMS Synch** button will enable, but after clicking, the button will *stay* enabled. The worker making changes in CONNECTIONS must ensure that the WMS application is AVAIL or the WMS case status is No Pend, UM/CL or A-SFED/M, and then click on the **WMS Synch** button.

Full Data Entry – WK2 Entry

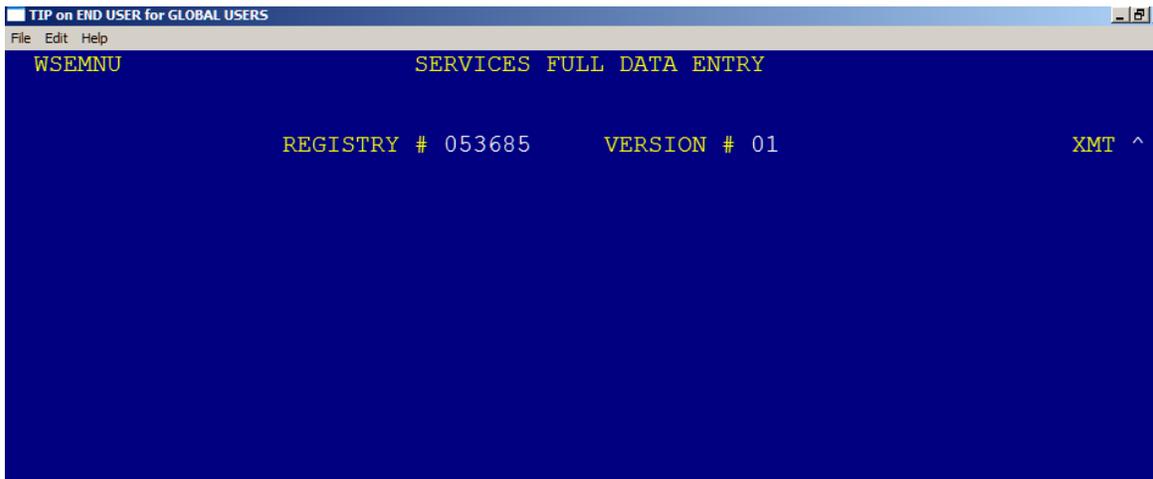
To begin FDE, select option 09 on the WMSMNU screen and transmit.



```
TIP on END USER for GLOBAL USERS
File Edit Help
WMSMNU
WELFARE MANAGEMENT SYSTEM MENU
USE APPROPRIATE SF KEY (1-24) OR INDICATE SELECTION NUMBER 09 xmt ^

01 PA/FS BUDGET CALCULATION          17 TIME LIMIT TRACKING MENU
02 MA BUDGET CALCULATION             18 AUTO SDX/WMS MENU
03 STATISTICS                        19 CCRS MENU
04 APPLICATION REGISTRY MENU         20
05 DENIAL ENTRY (APP AND SVCS)       21 W4139R INQUIRY REPORT
06 SIGN OFF                          22 DOMESTIC VIOLENCE MENU
07 N-S DATA ENTRY & DISPOSITION     23 GIS MENU
08 MAPPER APPLICATIONS               24 PA/FS & MA PERIODIC REPORTING
09 SERVICES FULL DATA ENTRY         25 MEDICAL ASSISTANCE MENU
10 SERVICES UNDERCARE/MAINTENANCE    26 SSA 40 QUARTER MATCHING
11 CLIENT NOTICES MENU               27 CBIC MENU
12 WMS CASE & INDIVIDUAL INQUIRY     28 EMPLOYMENT MENU
13 SCR MENU                          29 IV/A-IV/D RESPONDENT INFORMATION
14 RFI MENU                          30 FAIR HEARING MENU
15 BICS MENU                         31 MMIS INQUIRY MENU
16 WMSMNU (MENU KEY)                 32 IRCS MENU
```

WMS will produce the WSEMNU screen (“Services Full Data Entry”). Enter the WMS application’s Registry and Version numbers and transmit.



```
TIP on END USER for GLOBAL USERS
File Edit Help
WSEMNU
SERVICES FULL DATA ENTRY

REGISTRY # 053685    VERSION # 01    XMT ^
```

Once the Registry and Version numbers are transmitted, the WSEWK2 screen will appear and FDE has begun. The application status will be "AVAIL."

The screenshot shows a terminal window titled "TIP on END USER for GLOBAL USERS". The main display area contains the following text:

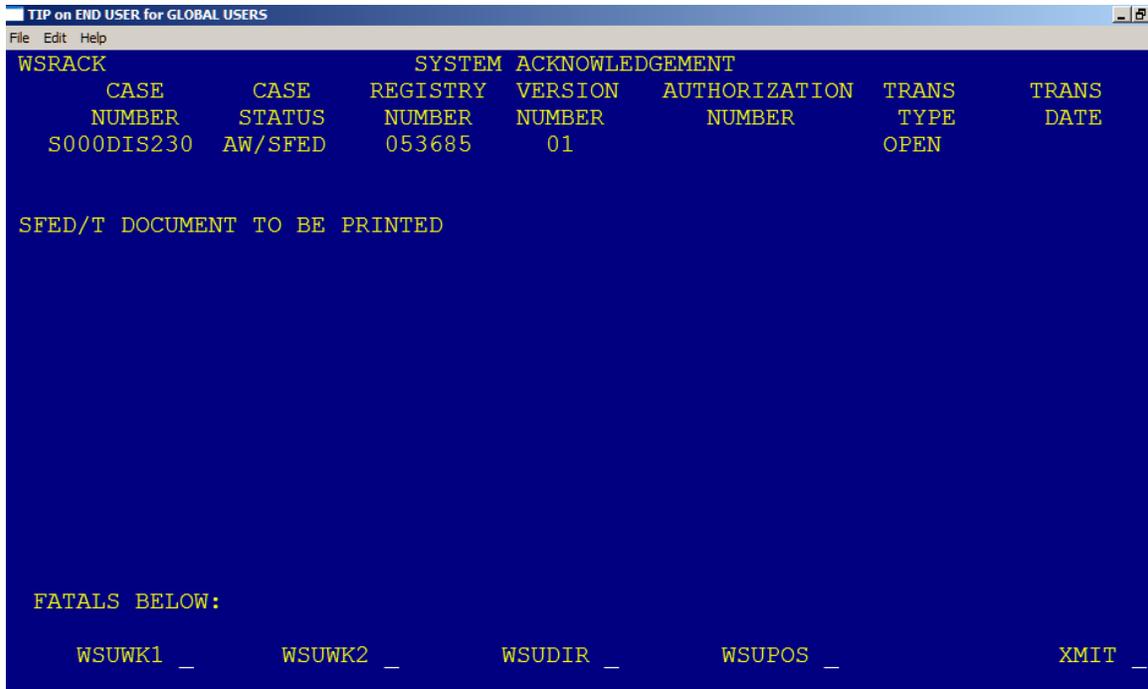
```

WSEWK2      CASE # S000DIS230      TYPE 40      PAGE 1 OF 1  04/12/0
TRAN TYPE 02      REGISTRY # 053685  VERSION # 01  REUSE _
OFF 074      UNIT 143__      WKR 000__
LN  CIN      REL  IND  FAM  MS  SI  LA  EM  CI  CODE  H  IABPW
01  ASSIGN__  01  1   A   2   _  40  _  C  02  _  _
02  ASSIGN__  04  1   B   2   _  42  _  C  02  _  _
03  _         _   _   _   _   _  _  _  _  _  _  _
04  _         _   _   _   _   _  _  _  _  _  _  _
05  _         _   _   _   _   _  _  _  _  _  _  _
06  _         _   _   _   _   _  _  _  _  _  _  _
07  _         _   _   _   _   _  _  _  _  _  _  _
08  _         _   _   _   _   _  _  _  _  _  _  _
09  _         _   _   _   _   _  _  _  _  _  _  _
10  _         _   _   _   _   _  _  _  _  _  _  _
AFA (LINE, CODE, DATE)
PROCESS CODE (FAM, CODE)
RELATED CASE #
INCOME (LN SO  AMT  PD, LN SO  AMT  PD, LN SO  AMT  PD, LN SO  AMT  PD)
REASON
EXTRA SFED/T
ACCEPT BLINKING FIELDS      MORE PAGES      XMT ^
  
```

Use the WMS Coding Guide to enter the appropriate codes. Information entered on this screen includes:

- Case Number
Services Case Numbers begin with "S"; assigned according to local district conventions
- CINs
Enter the CIN, or "ASSIGN" for individuals unknown to WMS
- Eligibility codes (CODE)
from information on worksheet/spreadsheet
- Income information
- Anticipated Future Action (AFA)
- Related Case numbers
- Relationship codes (REL)
- SSN Indicator (IND)
- Services Family Unit Indicator (FAM)
- Marital Status codes (MS)
- Living Arrangement codes (LA)
- Emancipated Minor codes (EM)
- Citizenship codes (CI)
- Student Indicator codes (SI)
- Ethnicity/Race codes (H and IABPW)

Once this information is entered and transmitted, the WSRACK screen (“System Acknowledgement”) will appear. When information on the WSEWK2 screen has been successfully entered and transmitted, the WSRACK screen will indicate “SFED/T document to be printed.” An SFED/T (Services Financial Eligibility Display/Turnaround) is generated by WMS and printed.



The WMS application status is FDE-COMP and the pending record status is AW/SFED (“Awaiting SFED”) and you may proceed to establish authorization for direct services and payment lines for purchased services by entering information on, respectively, the WSUDIR and WSUPOS screens. (If changes to any of the shared fields are attempted in CONNECTIONS during this period, the **WMS Synch** button will remain enabled after being clicked and changes made in CONNECTIONS will not update in WMS until batch update processing is completed and the **WMS Synch** button is clicked on again.)

Data on the SFED/T should match exactly the data on the Common Application (LDSS-2921). If there are discrepancies in *eligibility data*, go back to the WSEWK2 screen, make the corrections, and transmit. If there are discrepancies in *shared field data*, you can cancel the FDE transaction in WMS. Once overnight batch processing is completed, make the necessary corrections in CONNECTIONS, click on the **Save** or **WMS Synch** button, then re-enter the required data on the WSEWK2 screen and transmit, or you can wait for batch processing to be completed on the FDE transaction, make the necessary corrections in CONNECTIONS, and click on the **Save** or **WMS Synch** button.

Case Opening – DIR and POS Screens

After the WSEWK2 screen has been completed and a correct SFED/T generated, information to establish authorization for direct services and payment lines for purchased services must be entered on the WSUDIR and, if needed, the WSUPOS screens in WMS. To open the WSUDIR screen, select “WSUDIR” on the WSRACK screen and transmit. Codes (from the WMS Coding Guide) for the appropriate information are entered on WSUDIR. You can also access the WSUDIR screen via WMS Menu selection 19 – Transaction Type 02.

```

TIP on END USER for GLOBAL USERS
File Edit Help
WSUDIR CASE # S000DIS230 TYPE 40 AUTH PAGE 1 OF 1 04/12/200
TRAN TYPE 02 AUTH PER FROM 040106 TO 100106 REASON 09:57:31
12 MONTH AUTH REQUESTED N

LN CIN GS GL AP SF PI SERVICES
01 AX94151J - 03 - - - -
02 AX94152G - 03 - - - -
00 - - - - - 08 08E - - - -
00 - - - - - - - - - -
00 - - - - - - - - - -

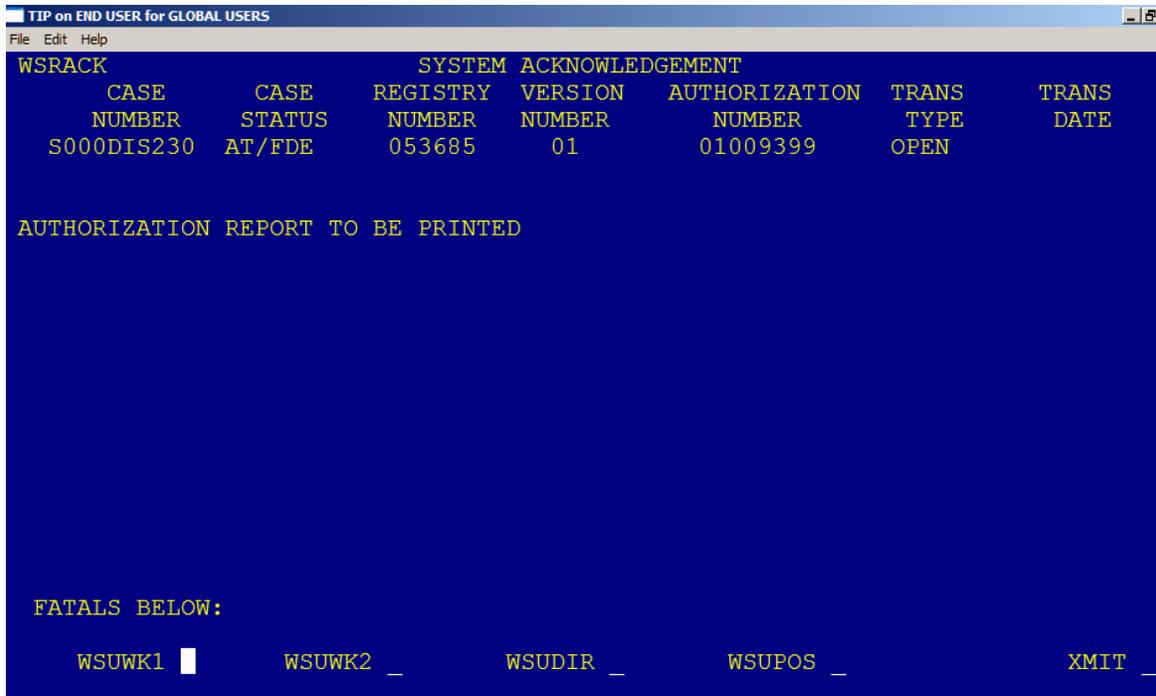
AFA (LN CD DATE, LN CD DATE, LN CD DATE, LN CD DATE, LN CD DATE)
TRANSACTION LN/SFU OFF UNIT WKR, LN/SFU OFF UNIT WKR, LN/SFU OFF UNIT WKR
ACCEPT BLINKING FIELDS XMT
  
```

```

TIP on END USER for GLOBAL USERS
File Edit Help
WSUPOS CASE # S000DIS230 TYPE 40 AUTH 01009399 PAGE 1 OF 1 04/12/06
TRAN TYPE 02 PURCHASE OF SERVICES

PSS LN SVC FROM TO AMT PER MAX MOP PROV ID CHK/VCHR ANI LOD LDF
01 02 61_ 030106 090106 C 3 00A01234
ACCEPT BLINKING FIELDS MORE PAGES XMT ^
  
```

Once the information entered is transmitted from the WSUDIR screen (and POS, if necessary), the WSRACK screen (“System Acknowledgement”) will appear, containing an authorization number and the message “Authorization Report To Be Printed.” A WMS Authorization (LDSS-2970) is generated. Hereafter, whenever a change is made to information on the WK2, DIR or POS screens, a new WMS Authorization, with a new authorization number, will be printed.



After overnight batch processing, the WMS case number will appear on the *Family Services Stage* window, indicating that the WMS case was successfully opened. If multiple records were transmitted on the application/case, only the last transaction, with the most current authorization number will go through the overnight batch process and BICS file maintenance. For districts that print the 2970, it is preferable to use the BICS-generated 2970 for record-keeping purposes. The Services Authorization is then signed and filed per local procedures.

Correcting Full Data Entry Errors

If a system error was encountered while entering data on one of the WMS screens, the field in which the error was made will become highlighted and the WMS error code may display at the bottom of the screen.

Enter “Y” in the “Accept Blinking Fields” field, or correct the applicable data. Upon transmitting, the WSRACK screen will appear, displaying the message, “Error Report To Be Printed.” The application will be in one of the following error statuses:

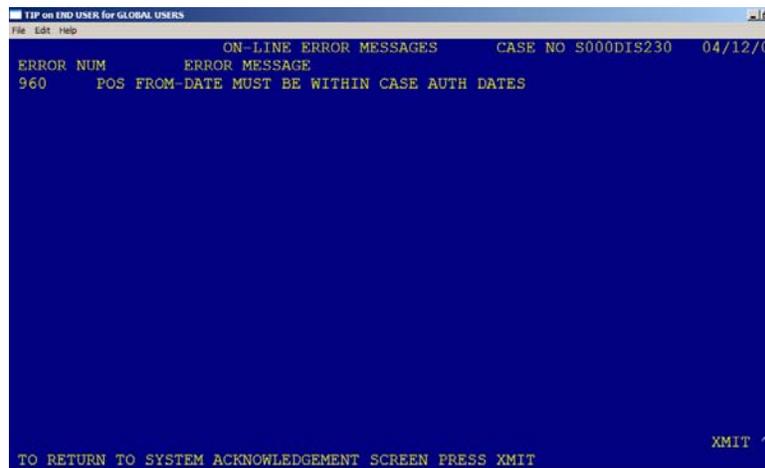
- SFED/ERR (“Awaiting Error Correction After Initial SFED Entry”).
- FDE/ERR (“Awaiting Error Correction After FDE”)



While the WMS pending record is in error status, changes made to shared fields in CONNECTIONS can be saved in CONNECTIONS but will not automatically update in WMS.



Press the F2 key on your keyboard to display the “On-Line Error Messages” screen. For non-fatal errors, an error message will indicate the type of error. Online error messages display only for non-fatal errors. Fatal errors cannot be accessed using the F2 key.



Return to the WSRACK screen, enter “X” beside the appropriate screen, and transmit. Then correct the error and transmit. The WSRACK screen should appear with a new authorization number and the message, “Authorization Report To Be Printed.”

If the error is a Fatal Error, on the WSRACK screen, you will receive the following message:

*“Transaction Rejected Fatal Error Detected
Fatal Error Report To Be Printed”*

A Fatal Error Report will be printed. The application’s status will be AVAIL because all the data entered has been lost. The WMS code for the fatal error will be listed at the bottom of the screen. Look up the error in the WMS Error Guide, correct the error and re-enter the data.

After the batch update process is completed, the WMS case number will appear on the *Family Services Stage* window.

Authorization Change Form (ACF)

Once a WMS case has been opened, stage composition and/or demographic changes in CONNECTIONS will initiate/require the following transactions in WMS: 06 recertification transactions for Add or Delete Person, and 05 undercare maintenance transactions for changing demographics. Procedures for these transactions are described in this section. The Case Manager can be changed at any time by selecting the new Case Manager on the *Family Services Assign* window and clicking on the **Save** button, and then clicking on the **WMS Synch** button. Changing the Application Date is no longer possible in WMS once FDE (WK2) has been completed—both the CONNECTIONS stage and the corresponding WMS Services case will have to be closed. (See “Case Closures” on page 59.)

The order in which the transactions are performed is important:

- If a person is added in CONNECTIONS (06 transaction for WMS), the WMS case goes into UM/CL status (“Awaiting Clearance Resolution After Undercare Maintenance”).

If a person is end-dated in CONNECTIONS (06 transaction), the case goes into A-SFED/M status (“Awaiting SFED Maintenance”).

Both of these statuses allow further transactions during the same WMS session.
- However, when a *demographic change* is performed and saved in CONNECTIONS (05 transaction), the WMS case will go into pending status AT/UM (“Awaiting Transmission After Undercare Maintenance”) and CONNECTIONS will not update WMS with any subsequent 06 transactions until batch update processing is completed or the pending transaction is cancelled in WMS (see “Cancelling a Pending Transaction for an Open WMS Case” on page 50).

Therefore, local district workers should add/end-date people from the FSS (06 transactions in WMS) first and change demographics (05 transactions) last. This series of transactions can be done during the same day and/or WMS session. Multiple 06 add/delete transactions can be completed during one transaction, then multiple 05 transactions can be completed, which will place the WMS case in pending status.

Always make sure the WMS case is in NO PEND, UM/CL or A-SFED/M status before proceeding to add or end-date a person in CONNECTIONS, or to change demographic information.



Voluntary Agency Exception to Transaction Order

When a voluntary agency worker adds or end-dates a person from a CONNECTIONS stage, these changes do not go to WMS until they are approved by a local district worker and the **WMS Synch** button is clicked. Therefore, voluntary agency workers should *reverse the order of transactions in CONNECTIONS*: do demographic changes first, and then additions and end-dating. While the WMS case is in pending status awaiting transmission of the demographic changes, an Alert concerning the add/end-date transactions is sent to the local district Case Manager (and the **WMS Synch** button enables).

Canceling a Pending Transaction for an Open WMS Case

1. On the WMS menu screen (WMSMNU), select option 07 (“N-S Data Entry and Disposition”).
2. Enter the WMS case number (from LDSS-2921) on the screen and transmit.
If the case is in “No Pend” status, a message will be returned indicating there are no transactions to cancel.
3. The entire transaction is cancelled, including any DIR or POS entries.
*The WMS pending status is now “No Pend.” In CONNECTIONS, the **WMS Synch** button enables. (The button will enable even if there are no demographic differences.) Wait for batch update processing to be completed before clicking on the **WMS Synch** button to synchronize.*

Note: If a transaction is cancelled in WMS for an activity that originated in CONNECTIONS, the **WMS Synch** button will be enabled in CONNECTIONS.

The list below gives a brief description of frequently occurring WMS pending status codes:

NO PEND	No Pending Data Exists
A/SFED-M	Awaiting SFED Maintenance
UM/CL	Undercare Maintenance Awaiting Clearance Resolution
AT/UM	Awaiting Transmission After Undercare Maintenance
AT/FDE	Awaiting Transmission After FDE
AU/FDE	Awaiting Local Update After FDE
AU/UM	Awaiting Local Update After Undercare
AW/SFED	Awaiting SFED Entry
FDE/ERR	Awaiting Error Correction After FDE
FDE/ALEC	FDE Awaiting Local Error Correction (BICS)
UM/ALEC	Undercare Maintenance – Awaiting Local Error Correction (BICS)
UM/ERR	Undercare Maintenance Awaiting Error Correction
REU-SER	Reused Services Pending Record
SFED/ERR	Awaiting Error Correction After Initial SFED Entry

Voluntary Agency Worker – Add/End-Date a Person, Change Demographics

Once a CONNECTIONS services stage has been established, any changes to the family composition (adding or end-dating an individual) made by voluntary agency workers will not be sent to WMS, but instead will generate an Alert To-Do to the local district Case Manager for approval. If the Case Manager approves the changes, s/he clicks on the **WMS Synch** button to send the data to WMS. Upon completion of the required add/delete transaction(s) in WMS (see

“Adding/Deleting People and Changing Demographics in WMS” on page 54), the recertification is complete in WMS.

Because of this procedure, voluntary agency workers are advised to make any necessary demographic changes in CONNECTIONS before adding or end-dating a person from the stage. This transaction order is the reverse of the transaction order for local district workers, because when a local district worker adds or end-dates a person in CONNECTIONS, the changes are sent directly to WMS, while these changes when initiated by voluntary agency workers are not.

The voluntary agency worker should make changes to demographic information first. In CONNECTIONS, the changes are made one person at a time by clicking the **Save** button after each person’s line has been updated. After each click of the **Save** button, a new Services Authorization (LDSS-2970), with a new authorization number, will be sent to the WMS printer. If any stage participants need to be end-dated from the stage, the individual is end-dated in CONNECTIONS using the **End Date Stage Involvement** command on the **Options** menu on the *Family Services Stage* window. When the **Save** button on the *End Date Reason* window is clicked, an Alert To-Do is sent to the Case Manager and the **WMS Synch** button will be enabled.

Before adding individuals to the stage, perform a CONNECTIONS Person Search. If a match is found (i.e. the person exists in CONNECTIONS), verify the demographic information and click on the **Relate** button. If the *Add Person* window appears, add the required information and click **Save**. If the *Add Person* window does *not* appear during the Add/Relate process, the person was saved to the FSS stage composition in CONNECTIONS when the **Relate** button was clicked. The **WMS Synch** button will enable. When a voluntary agency worker clicks on the **Save** or **WMS Synch** button after adding or end-dating (deleting) a person, the update is not sent to WMS. Instead, an Alert To-Do is sent to the Case Manager and the **WMS Synch** button enables (if it hasn’t already because of previous changes).

The Case Manager reviews the modifications and a WMS Inquiry is performed to identify any existing WMS case involvement (see “WMS Inquiry” on page 34). The Case Manager should contact the voluntary agency worker about any changes to the stage composition s/he feels should be reversed, following local district policy. Once these are reconciled, the WMS case status should be checked; always make sure the WMS case is in NO PEND, UM/CL or A-SFED/M status before clicking on the **WMS Synch** button.

When the Case Manager clicks on the **WMS Synch** button, if a person was added, a Clearance Report will be printed. The line number of the person being selected on the Clearance Report should be noted; this will be the line number used in the WMS case for completion of the transaction. If a person was end-dated from the stage, the appropriate transaction must be completed in WMS. See “Adding/Deleting People and Changing Demographics in WMS” on page 54.



Voluntary Agency Exception to Transaction Order

When a voluntary agency worker adds or end-dates a person from a CONNECTIONS stage, these changes do not go to WMS until they are approved by a local district worker and the **WMS Synch** button is clicked. Therefore, voluntary agency workers should *reverse the order of transactions in CONNECTIONS*: do demographic changes first, and then additions and end-dating. While the WMS case is in pending status awaiting transmission of the demographic changes, an Alert concerning the add/end-date transactions is sent to the local district Case Manager (and the **WMS Synch** button enables).

Local District Worker – Add a Person

If a local district worker needs to add a person to the stage composition but is not authorized to perform WMS data entry, the worker should complete an Authorization Change Form (ACF) or Services Worksheet and forward it for data entry per district procedures. The procedure described below involves transactions completed in both WMS and CONNECTIONS. Consult your district procedures for specifics.

To add a person to a case:

- 1 A WMS Inquiry is done to check for Non-Services involvement. The Non-Services worker should be contacted if demographics in the Non-Services case differ from the Services case in order to reconcile discrepancies.
- 2 Check the WMS case's status. Always make sure the WMS case is in NO PEND, UM/CL or A-SFED/M status before proceeding to add or end-date a person in CONNECTIONS, or to change demographic information.
- 3 Perform a CONNECTIONS Person Search.
 - If no match is found, click on the **New** button in the *Add/Relate Person* window and record the required information in the *Add Person* window, then click on the **Save** button. *The person will be saved to the CONNECTIONS stage and the WMS case will be updated. A Clearance Report will be printed.*
 - If a match is found, click on the **Relate** button in the *Add/Relate Person* window. *If additional information is not required, you will be returned to the **Stage Composition** tab. The person will be saved to the CONNECTIONS stage and the WMS case will be updated. A Clearance Report will be printed.*

*If additional information is required, record the information in the Add Person window and click on the **Save** button. The **WMS Synch** button will enable.*
- 4 If necessary, click on the **WMS Synch** button.
A Clearance Report will be printed.
- 5 Check the Clearance report against the ACF or Services Worksheet.
 - If there is a match, write the CIN on the ACF or Services Worksheet
 - If there are no matches, write "ASSIGN" on the ACF or worksheet.



Local District Worker - Transaction Order

If you wish to perform multiple adds, deletes, and/or demographic changes during the same day or session, sort the transactions as follows:

Adds/Deletes (06) first;
Demographic changes (05) last.

Note: Once add, delete and demographic change transactions have been completed in WMS (pending status is AT/UM), you must await the completion of batch update processing before initiating any further shared field transactions in CONNECTIONS.

Local District Worker – End-date (Delete) a Person

If a local district worker needs to end-date a person in the stage composition but is not authorized to perform WMS data entry, the worker should complete an Authorization Change Form or Services Worksheet and forward it to Data Entry per district procedures. The procedure described below involves transactions completed in both WMS and CONNECTIONS. Consult your district procedures for specifics.

To delete a person from a case:

- 1 Check the WMS case status. Always make sure the WMS case is in NO PEND, UM/CL or A-SFED/M status before proceeding to add or end-date a person in CONNECTIONS, or to change demographic information.

Note: *If the person being deleted is the designated Applicant/Payee in the WMS case, a new Applicant/Payee will need to be assigned before the person is deleted. WMS will allow more than one applicant/payee on the WMS case at any one time.*

- 2 End-date the person in CONNECTIONS using the **End Date Stage Involvement** command on the **Options** menu on the *Family Services Stage* window. Select a reason for the end-dating in the *End Date Reason* window, and click on the **Save** button. *You will be returned to the **Stage Composition** tab, and the person will no longer appear on the Person List. Please note that, in WMS, after you delete a person, the name remains on the authorization for one time (looking as though you never made the change). The next time you generate an authorization the name will be gone.*

Note: Once add, delete and demographic change transactions have been completed in WMS (pending status is AT/UM), you must await the completion of batch update processing before initiating any further shared field transactions in CONNECTIONS.



Local District Worker - Transaction Order

If you wish to perform multiple adds, deletes, and/or demographic changes during the same day or session, sort the transactions as follows:

Adds/Deletes (06) first;
Demographic changes (05) last.

Local District Worker – Change Demographic Information

If a local district worker needs to change demographic information in the stage composition but is not authorized to perform WMS data entry, the worker should complete an Authorization Change Form or Services Worksheet and forward it to Data Entry per district procedures. The procedure described below involves transactions completed in both WMS and CONNECTIONS. Consult your district procedures for specifics.

To change demographics in a case:

- 1 A WMS case search is done to check for Non-Services involvement
The Non-Services worker must be contacted if people and/or demographics in the Non-Services case differ from the Services case in order to reconcile discrepancies.



Local District Worker - Transaction Order

If you wish to perform multiple adds, deletes, and/or demographic changes during the same day or session, sort the transactions as follows:

Adds/deletes (06) first;
Demographic changes (05) last.

- 2 Check the WMS case status. Always make sure the WMS case is in NO PEND, UM/CL or A-SFED/M status before proceeding to add or end-date a person in CONNECTIONS, or to change demographic information.
- 3 On the **Stage Composition** tab, change the demographic information (and save) one person at a time.
*The **Save** button is enabled.*
- 4 Click the **Save** button.

Note: Once add, delete and demographic change transactions have been completed in WMS (pending status is AT/UM), you must await the completion of batch update processing before initiating any further shared field transactions in CONNECTIONS.

Adding/Deleting People and Changing Demographics in WMS

After all adding and/or end-dating of people and demographic changes have been made in CONNECTIONS, the appropriate data must be entered in the WMS Services case.

- 1 Search for the Services case in WMS using WMS Inquiry.
 - *If the WMS case status is AT/UM, do not proceed further. Wait for overnight batch processing before completing the transactions.*
 - *If the WMS case status is UM/ERR or UM/ALEC, correct the WMS errors, then check the WMS case status. If the status is AT/UM, wait for batch processing to be completed before proceeding.*
 - *If the WMS case status is UM/CL or A-SFED/M, you can proceed with the transactions.*
- 2 To add a person to the WMS Services case, the recertification process is completed by:
 - entering the additional information for the added person(s) on the WSUWK2 (Eligibility Data) screen after reviewing the Clearance Report;
 - completing the DIR and, if necessary, POS screens for the new case participant. *A new SFED/T and Services Authorization, with a new authorization number, will be printed. File the output according to local district procedures.*

Note: Due to the change in WMS case authorization dates, POS line data for other individuals on the case will need updating as well. Addition of a new person to the WMS case may be verified by looking at WMS Inquiry screen 12, selection B, "Case Make-Up/Indivs," and by pressing the SF4 key to view pending data. It is not necessary to update or look at WMS screen WSUWK1 ("Demographic Information"), when doing WMS data entry for the newly added person unless you wish to verify the line number. Screen WSUWK2 may be accessed immediately when doing WMS data entry without reviewing screen WSUWK1. Remember to complete the addition in WMS.

- 3 To delete a person from the WMS Services case:
 - On the WSUDIR screen, establish a new Case Authorization "From" date and enter the Goal Status, if necessary, or remove the app/line, if appropriate;

- If necessary, on the WSUPOS screen, shorten related POS lines for the end-dated person using a “To” date equal to the day of the person’s removal from the case. Update POS lines for remaining individuals on the case so that POS “From” and “To” dates fall within the new authorization period.

A new Service Authorization with a new authorization number will be printed. File the output according to local district procedures.

Note: If the person being deleted is the Applicant/Primary Caretaker, designate a new Applicant/Primary Caretaker. WMS will allow more than one Applicant/Primary Caretaker on the WMS case at a time.

- 4 Update the WMS case address, if necessary.

Note: Updated demographic information, synched to WMS from CONNECTIONS, is subject to the online WMS error process. For example, if a Social Security number is changed, and the SSN indicator is not changed in WMS, the WMS case will go into error status and an error report will be generated. If an individual’s gender is changed and the relationship code (REL) is impacted and not corrected, the WMS case will go into error status and an error report will be generated.

- 5 Check WMS after batch processing. The WMS case status should be “Active,” and any persons added to the case will have CINs assigned.

Problems Encountered During Authorization Changes

Adding a Person (06 transaction)

Problem:

There are less than 20 individuals on the case but it appears that all the WMS lines have been used.

Solution:

Once an individual has been added in CONNECTIONS, the next available line number in WMS is used. If the individual add transaction is not completed in WMS, and the same individual is added again and again in CONNECTIONS, subsequent available lines may be used. This may cause all 20 available lines in WMS to be used up. Call the Enterprise Help-Desk at 1-800-697-1323 for assistance in clearing these unneeded lines.

Undercare Maintenance Problems (05 transactions)

Problem:

A new worker was assigned to the CONNECTIONS stage but the WMS unit/worker codes were not updated.

Solution:

The new Case Manager (or any worker associated with the case who needs the office/unit/worker update in WMS) needs to click on the **Save** or **WMS Synch** button on the *Family Services Stage* window. Office/unit/worker codes may be updated in WMS but are overridden when a new save or synch transaction comes over from CONNECTIONS.

Problem:

An individual has a duplicate CIN in WMS.

Solution:

Per local district procedures, submit information to have the CINs unduplicated. When the correct CIN is updated in WMS, the CIN will update CONNECTIONS if needed. Please see “CIN UNDUP” on page 56 for a more detailed description of the procedures.

Problem:

The Social Security number indicator (SSN) is other than 1 (SSN Present) or 8 (WMS-SSA Valid) and WMS case processing is not allowed.

Solution:

This is generally caused by entry of an incorrect Social Security number during CONNECTIONS stage processing. If the SSN indicator is equal to "A" to "E", the correct Social Security number can be updated in CONNECTIONS and WMS will be updated with the indicator of "1".

Additional problems with the SSN indicator should be directed to the WMS Help Desk at 1-800-342-3727.

Undercare Change in Services – WMS (Related to Interface)

An undercare change in *services* will need to be performed when:

- a current service is ended; or
- a new service is to be provided.

If the worker is not authorized to perform WMS data entry, the worker completes the Authorization Change Form and forwards it for data entry per local district procedure, and then makes the necessary updates in CONNECTIONS. If the service change is within FASP timeframes, the FASP is updated with the new services information; if not, a Plan Amendment is launched. Then, if necessary, the Program Choice and Permanency Planning Goal are updated on the *Tracked Children Detail* window.

CIN UNDUP

CIN UNDUP is necessary when WMS Inquiry or a Clearance Report shows multiple CINs for the same individual in two separate, active WMS cases. Since the advent of the CONNECTIONS/WMS interface, one or more of the CINs may be involved in CONNECTIONS stage(s) as well. When the duplicate CINs are identified in WMS, please search the CONNECTIONS system for the individual's involvement in a Child Welfare Services stage.

PLEASE NOTE: The procedures for unduplicating CINs described in this section assume that the WMS and CONNECTIONS workers concerned have already agreed on the CIN and demographics to be retained.

There are two possible CIN UNDUP scenarios in which duplicate CINs might occur:

- A CONNECTIONS services stage and linked WMS case have a person in common (though with different CINs) with a non-linked WMS case. The non-linked WMS case can be either Services (e.g. Daycare, Adult Care) or Non-Services (e.g. Family Assistance, Safety Net, Medicaid, Food Stamps, etc.).
- A CONNECTIONS services stage and linked WMS case have a person in common (though with different CINs) with *another* CONNECTIONS services stage and linked WMS case.

Scenario 1

CIN UNDUP for the first scenario (conflict with a non-linked WMS case) proceeds as follows:

1. Verify that names, Date of Birth and Social Security number are *exact* matches for the two (linked and non-linked) WMS cases. CIN UNDUP will be rejected if this data does not match exactly.
2. If the names, Date of Birth and/or Social Security number DO NOT match *exactly*, update the incorrect data:

- If the data to be changed is in the *linked WMS case*, update the information on the **Stage Composition** tab in CONNECTIONS and click on the **Save** button.

—OR—

- If the data to be changed is in the *non-linked WMS case*, perform an undercare maintenance (05) transaction in WMS.

Note: Changes to demographic information will put the WMS case being changed into AT/UM pending status (“Awaiting Transmission after Undercare Maintenance”). At this point in the CIN UNDUP procedure, you must wait for overnight batch processing to be completed before proceeding further.

3. Once the names, Date of Birth and Social Security number match exactly (batch update completed, if necessary, and changes verified), one of the CINs must be made inactive.

Note: For a CIN UNDUP request to be accepted, one of the CINs *must* be inactive.

- If the *CONNECTIONS services stage and linked WMS case* has the CIN to be deleted, end-date the person from the CONNECTIONS stage. Complete the deletion process in WMS.

After batch processing, the corresponding WMS person will be deleted, and that CIN becomes inactive.

—OR—

- If the *non-linked WMS case* has the CIN to be deleted, delete the person from the non-linked WMS case.

After batch processing, the person will be deleted from the WMS case, and that CIN will be inactive.

4. Request a CIN UNDUP, following local district procedures.

Note: The local district should email CIN UNDUP requests to “OTDA.SM.WMSCIN.” CIN UNDUP batch processing runs on Friday night. On the Monday following CIN UNDUP processing, the local district will receive a three-part CIN UNDUP Report: UNDUPs accepted, UNDUPs rejected, and statistics. *Before proceeding with the final steps of this procedure, the CIN UNDUP report should be checked to verify that the request was accepted. Perform a WMS/CONNECTIONS Inquiry to make certain that the UNDUP was completed.* If the request was rejected or is not yet completed, relating the person back into the CONNECTIONS stage or adding the person back into the non-linked WMS case will not resolve the CIN problem.

5. After the CIN UNDUP request has been *accepted* (the Monday following the request):

- If the *CONNECTIONS services stage and linked WMS case* had the CIN to be deleted:

The person should be *related* from the CONNECTIONS database back into the stage. (If you try to *add* the person back into the stage using the **New** button on the *Add/Relate Person* window, duplicate PIDs will be generated in CONNECTIONS.) Refer to the *CONNECTIONS Case Management Step-by-Step Guide* for information on relating a person to a stage.

Complete any additional information needed in CONNECTIONS (e.g. family relationship matrix, Primary/Secondary Caretaker, etc.), then complete the add transaction (and CIN assignment) in WMS.

*After batch processing, the correct CIN will automatically populate in the **Person Identifiers** field on the **Stage Composition** tab of the CONNECTIONS stage.*

—OR—

- If the *non-linked WMS case* had the CIN to be deleted, complete an add person transaction (and CIN assignment) in WMS to add the person back into the non-linked WMS case.
After batch processing, the correct CIN will display in the non-linked WMS case.



Add Person window

If the *Add Person* window appears while relating the person back into the CONNECTIONS stage, enter the required information and click on the **Save** button on the *Add Person* window. Click on the **WMS Synch** button to add the person to the linked WMS case. Then complete the add transaction (and CIN assignment) in WMS.

Scenario 2

CIN UNDUP for the second scenario (one linked WMS case in conflict with another linked WMS case) proceeds as follows:

1. Verify that names, Date of Birth and Social Security number are *exact* matches for the two WMS cases. CIN UNDUP will be rejected if this data does not match exactly.
2. If the names, Date of Birth and/or Social Security number do not match *exactly*, update the incorrect data on the **Stage Composition** tab in CONNECTIONS and click on the **Save** button.

Note: Changes to demographic information will put the WMS case being changed into AT/UM pending status (“Awaiting Transmission after Undercare Maintenance”). At this point in the CIN UNDUP procedure, you must wait for overnight batch processing to be completed before proceeding further.

3. Once the names, Date of Birth and Social Security number match exactly (batch update completed, if necessary, and changes verified), one of the CINs must be made inactive. (**Note:** For a CIN UNDUP to be accepted, one of the CINs *must* be inactive.) End-date from the appropriate CONNECTIONS stage the person with the CIN to be deleted. Complete the transaction in WMS to delete the person from the WMS Services case.
After batch processing, the corresponding WMS person will be deleted, and that CIN becomes inactive.

4. Request a CIN UNDUP, following local district procedures.

Note: The local district should email CIN UNDUP requests to “OTDA.SM.WMSCIN.” CIN UNDUP batch processing runs on Friday night. On the Monday following CIN UNDUP processing, the local district will receive a three-part CIN UNDUP Report: UNDUPs accepted, UNDUPs rejected, and statistics. *Before proceeding with the final steps of this procedure, the CIN UNDUP report should be checked to verify that the request was accepted. Perform a WMS/CONNECTIONS Inquiry to make certain that the UNDUP was completed.* If the request was rejected or is not yet completed, relating the person back into the CONNECTIONS stage will not resolve the CIN problem.

5. After the CIN UNDUP request has been *accepted* (the Monday following the request), perform a Person Merge in CONNECTIONS. (The two identities in the CONNECTIONS database will each have their own CONNECTIONS-generated Person Identifiers [PIDs]. In order to avoid duplicate PIDs, the two identities must be merged before you relate the person back into the stage.)

6. Relate the person back into the CONNECTIONS stage from which he/she had been deleted. (If you try to *add* the person back into the stage using the **New** button on the *Add/Relate Person* window, duplicate PIDs will be generated in CONNECTIONS.) Refer to the *CONNECTIONS Case Management Step-by-Step Guide* for information on relating a person to a stage.

Complete any additional information needed in CONNECTIONS (e.g. family relationship matrix, Primary/Secondary Caretaker, etc.), then complete the add transaction (and CIN assignment) in WMS. *After batch update processing, the correct CIN will automatically populate in the **Person Identifiers** field on the **Stage Composition** tab of the CONNECTIONS stage.*



Add Person window

If the *Add Person* window appears while relating the person back into the stage, enter the required information and click on the **Save** button on the *Add Person* window.

Click on the **WMS Synchron** button to add the person to the linked WMS case. Then complete the add transaction (and CIN assignment) in WMS.

A CIN UNDUP request may be rejected for the following reasons:

- There are other active cases from which the bad CIN has not been deleted.
- There is a data mismatch on the CIN UNDUP request form.

Case Closings

WMS cases linked to CONNECTIONS services stages must be closed by first closing the FSS stage in CONNECTIONS. WMS cases *not* linked to CONNECTIONS may be closed per normal processes. For cases linked to a CONNECTIONS stage, complete all required work in CONNECTIONS (e.g. FASP, Plan Amendment, etc.) and enter a closure reason on the **Case Summary** tab. If the *Stage Closure Question* window opens, complete the pop-up Narrative, then save and submit the closing for approval. Approval of the FSS stage closing in CONNECTIONS will change the “Z” (CCRS indicator in WMS) to a “Y.” The WMS case cannot be closed until the “Y” indicator has posted.

If the WMS application is in “AVAIL” status (FDE has not been completed), closing the FSS will cause the application in WMS to be withdrawn automatically. WMS will print a Withdrawal

Report that should be placed in the case file. If the WMS application is in "FDE-COMP," closing the FSS will not withdraw the application. A batch process deletes these records.

After the stage closure has been approved in CONNECTIONS, the CCRS Indicator change to "Y" should be verified. If the CCRS Indicator is "Z," please call the Enterprise Help Desk at 1-800-697-1323.

Appendix A: CCRS Coding

Current CCRS PPG	New CONNECTIONS PPG
01 Discharge to Parents	1a – Return to Parent [Parent]
	1b – Return to Parent [Non-Parent Caregiver]
04 Discharge to Adoption	2a – Placement for Adoption [Upon filing Petition to Terminate Parental Rights]
	2b – Placement for Adoption [Upon Voluntary Surrender]
02 Discharge to Primary Resource Person	3a – Referral for Legal Guardianship/Custody [Relative]
	3b – Referral for Legal Guardianship/Custody [Non-Relative]
12 Discharge to Relative	4 – Placement with a fit and willing Relative [Non-Guardianship/Non-Custodian]
03 Discharge to Independent Living	5a – Place in another planned living arrangement [Discharge to Independent Living] <i>Note: May use only if the social services district has documented a compelling reason why goals 1-4 would not be in the child's best interest.</i>
10 Independent Living Unaccompanied Refugee Only	5b – Place in another planned living arrangement [Independent Living – Unaccompanied Refugee Only] <i>Note: May use only if the social services district has documented a compelling reason why goals 1-4 would not be in the child's best interest.</i>
05 Discharge to Adult Residential Care	5c – Place in another planned living arrangement [Discharge to Adult Residential Care] <i>Note: May use only if the social services district has documented a compelling reason why goals 1-4 would not be in the child's best interest.</i>
06 Prevent Placement	6 – Prevent Placement
07 Prevent Return to Placement	7 – Prevent Return to Placement
11 Protect Child	8 – Protect Child

New PPGs for Non-LDSS Custody-Relative/Resource Placements:

9a – Reunite with Parent

9b – Legalize Living Arrangement with Relative/Resource

9c – Permanent Living Arrangement (Non-Guardianship/Non-Custodian)

Appendix B: WMS Maintenance

Task in CONNECTIONS	Special Instructions	What Happens in WMS	Possible Results / Instructions
Add people to cases	Do not add a person to a case when WMS case is in a pending status other than No Pend, AT/UM or A-SFED/M.	Will display in WMS and the WMS case would be in "UM/CL" status. Complete FDE (Full Data Entry) for new person (including recert). After nightly batch processing, CIN will display in CONNECTIONS.	Fatal Error: <i>LN24 Cannot add or delete person due to pending record.</i> You cannot add a person to a WMS case when other pending records exist in WMS. If you need to perform multiple tasks on the same case, please ensure that you add/delete people prior to changing demographics for other case members.
End-date people from cases	Do not end-date a person from a case when WMS case is in a pending status other than No Pend, AT/UM or A-SFED/M.	Will be deleted in WMS and the WMS case will be in "A-SFED/M" status. Navigate to the WMS DIR screen and enter the goal status for the deleted person if it applies. You must also complete a recert (06). Select only the WSUWK2, WSUDIR and WSUPOS (if needed) to complete the recert transaction.	Fatal Error: <i>LN24 Cannot add or delete person due to pending record.</i> You cannot end-date a person in a WMS case when other pending records exist in WMS. If you need to perform multiple tasks on the same case, please ensure that you add/delete people prior to changing demographics for other case members. Note: After you delete a person, the name remains on the Services Authorization (LDSS-2970) as though you had never made the change. However, no further action is required: the next time a Services Authorization is generated for the case, the name will be gone.
Change Middle Initial	Need to change, add or delete on the Stage Composition tab (in CONNECTIONS), NOT in the <i>Person Detail</i> window.	Will display in WMS and be in "AT/UM" status; after batch processing, will be in sync.	Fatal Error: <i>This individual is also active in a Non-Services case. The Middle Name of this individual was changed and the change does not match the Middle Name on the data base.</i> <i>*FATAL* for Last name, Firstname (PID:99999999).</i> The Case Manager will receive an Alert To-Do; the WMS Synch button will remain enabled until resolved by the Services/Non-Services workers.
Change Last Name	Can be changed on the Stage Composition tab (in CONNECTIONS), OR in the <i>Person Detail</i> window.	Will display in WMS and be in "AT/UM" status; after batch processing, will be in sync.	Fatal Error: <i>This individual is also active in a Non-Services case. The Last Name of this individual was changed and the change does not match the Last Name on the data base.</i> <i>*FATAL* for Last name, Firstname (PID:99999999).</i> The Case Manager will receive an Alert To-Do; the WMS Synch button will remain enabled until resolved by the Services/Non-Services workers.

Task in CONNECTIONS	Special Instructions	What Happens in WMS	Possible Results / Instructions
Change First Name	Can be changed on the Stage Composition tab (in CONNECTIONS) OR in the <i>Person Detail</i> window.	Will display in WMS and be in "AT/UM" status; after batch processing, will be in sync.	<p>Fatal Error: <i>This individual is also active in a Non-Services case. The First Name of this individual was changed and the change does not match the First Name on the data base.</i> <i>*FATAL* for Last name, Firstname (PID:99999999).</i></p> <p>The Case Manager will receive an Alert To-Do; the WMS Synch button will remain enabled until resolved by the Services/Non-Services workers.</p>
Change Suffix (Jr, Sr.)	Can be changed, added or deleted on the Stage Composition tab (in CONNECTIONS) OR in the <i>Person Detail</i> window.	Will display in WMS and be in "AT/UM" status; after batch processing, will be in sync.	<p>Fatal Error: <i>This individual is also active in a Non-Services case. The Last Name of this individual was changed and the change does not match the Last Name on the data base.</i> <i>*FATAL* for Last name, Firstname (PID:99999999).</i></p> <p>This is because Suffix is considered part of the last name in WMS.</p> <p>The Case Manager will receive an Alert To-Do; the WMS Synch button will remain enabled until resolved by the Services/Non-Services workers.</p>
Change Date of Birth	Can be changed, added on the Stage Composition tab (in CONNECTIONS) OR in the <i>Person Detail</i> window.	Will display in WMS and be in "AT/UM" status; after batch processing, will be in sync.	<p>Fatal Error: <i>This individual is also active in a Non-Services case. The Date of Birth of this individual was changed and the change does not match the Date of Birth on the data base.</i> <i>*FATAL* for Last name, Firstname (PID:99999999).</i></p> <p>The Case Manager will receive an Alert To-Do; the WMS Synch button will remain enabled until resolved by the Services/Non-Services workers.</p>
Change Social Security number	Can be changed, added on the Stage Composition tab (in CONNECTIONS) OR in the <i>Person Detail</i> window.	Will display in WMS and be in "AT/UM" status; after batch processing, will be in sync.	<p>Fatal Error: <i>This individual is also active in a Non-Services case. The SSN of this individual was changed and the change does not match the SSN on the data base.</i> <i>*FATAL* for Last name, Firstname (PID:99999999).</i></p> <p>The Case Manager will receive an Alert To-Do; the WMS Synch button will remain enabled until resolved.</p> <p>Note: If the SSN code in WMS is A through E, then changing the number in CONNECTIONS will not change the number in WMS (and the WMS Synch button will enable). You will get an error message in CONNECTIONS asking you to make the change in WMS; however, the SSN cannot be changed in WMS either, since it is a shared field. The only solution is to call the Enterprise Help Desk (1-800-697-1323) and ask them to open a ticket to change the "Z" indicator (open case known to CONNECTIONS) to a "Y" (closed case known to CONNECTIONS). Change the SSN in WMS, and then have the indicator changed back to "Z."</p>

Task in CONNECTIONS	Special Instructions	What Happens in WMS	Possible Results / Instructions
Change any demographic data or add or delete individual	Do not change any demographic data or add or delete an individual when WMS case is in a pending status other than No Pend, AT/UM or A-SFED/M.	Changes made in CONNECTIONS will not be reflected in WMS. The WMS Synch button becomes enabled. After batch processing is complete, click on the WMS Synch button so the pending data in CONNECTIONS goes to WMS.	<i>LN24 – Transaction not allowed until batch.</i>
Change Sex	Can be changed or added on the Stage Composition tab in CONNECTIONS OR in the <i>Person Detail</i> window.	Will show up in WMS and be in “AT/UM” status; after batch processing, will be in sync.	<p>Change to the Applicant/Payee: Fatal Error: <i>This individual is also active in a Non-Services case. The Sex of this individual was changed and the change does not match the sex on the data base (for the Applicant/Payee).</i> <i>*FATAL* for Last name, Firstname (PID:99999999).</i></p> <p>The Case Manager will receive an Alert To-Do; the WMS Synch button remains enabled until resolved.</p>
Change Case Name	Change in CONNECTIONS.	Must change Case Name in WMS, if FDE has been completed and successfully updated through WMS batch.	N/A
Change addresses	Change in CONNECTIONS.	Must change Case Address in WMS if FDE has been completed and successfully updated through WMS batch. Make sure this corresponds with the “payee address” in CONNECTIONS. Interface will not automatically synchronize any addresses.	N/A
Change Primary Caretaker while in Application Registration (App Reg) stage (prior to FDE)	None.	Will change the case name in WMS if the application status is AVAIL.	N/A

Task in CONNECTIONS	Special Instructions	What Happens in WMS	Possible Results / Instructions
Change Address for Primary Caretaker while in Application Registration (App Reg) stage (prior to FDE)	None.	Will change the case address in WMS.	After the case is open, the case name and case address can be modified on the WSUWK1 screen in WMS.

Note: Any non-fatal error messages will advise the user to go to WMS and do “zero maintenance” to view the message(s). There was not enough room in CONNECTIONS to display all possible non-fatal errors.

Appendix C: Glossary

Table of Comparable Terms	
WMS	CONNECTIONS
<p>Application Date</p> <p>The date the signed Common Application (LDSS-2921) was <i>received</i> by the local district. It is encoded at the top of the Common Application (LDSS-2921). This date will become the WMS Case Opening Date if:</p> <ul style="list-style-type: none"> • the WMS case is for Adult Protective or Child Care; or • the date is the earliest of the four CID Trigger Dates (see “Case Initiation Dates (CIDs)” on page 13). 	<p>Date of Application</p> <p>The date the Common Application for services (LDSS-2921), signed by a parent/client (or CPS worker), was <i>received</i> by the local district. This date is recorded in the Decision Summary tab of the Family Services Intake (FSI) stage in CONNECTIONS. If the FSI is stage progressed to a Family Services Stage, the Date of Application appears in the CID Trigger Dates section of the FASP window.</p>
<p>Case Opening Date</p> <p>For Child Welfare Services cases, this date is based on the Case Initiation Date in CONNECTIONS.</p> <p>For children who are legally freed for adoption (WMS Services type 01 and 08), this date is based on the date a new CCR (Child Case Record) stage was created in CONNECTIONS from a CWS stage.</p>	<p>Case Initiation Date</p> <p>The first day of a Family Services Stage. The CID is the <i>earliest</i> of the following events:</p> <ul style="list-style-type: none"> • <i>Date of CPS indication</i> The approval date of the CPS Investigation Conclusion when a report is indicated. • <i>Date of application for services</i> The date the Common Application (LDSS-2921) for services that has been signed by a parent/client was <i>received</i> by the local district. • <i>Date of placement</i> The date on which a child is placed in foster care. • <i>Date of court order</i> The date of the court order for preventive services, commitment of care and custody, or custody and guardianship to the LDSS commissioner for placement.

Table of Comparable Terms

WMS	CONNECTIONS
<p>Case</p> <p>Cases in WMS may be one of two types—Services cases and Non-Services cases.</p>	<p>Case</p> <p>In CONNECTIONS, a case is a grouping of one or more stages of service.</p> <p>A case may include any of the following stages of service: CPS Intake (INT), CPS Investigation (INV), Family Services Intake (FSI) and Family Services Stage (FSS).</p>
	<p>Stage</p> <p>A stage is a logical grouping of related casework activities. There are several different stage types in CONNECTIONS. The interface between CONNECTIONS and WMS is established through the FSS stage.</p>
<p>Delete (Person)</p> <p>Delete is the WMS term for removing a person from an open WMS case. However, the person's record (and CIN) remain in the WMS database.</p>	<p>End Date (Person)</p> <p>End Date is the term for removing a person from the stage composition of a CONNECTIONS stage. However, they remain a part of the case history. The end-dated person is no longer listed on the Stage Composition tab of the <i>Family Services Stage</i> window, but his/her records can still be accessed using the View Historical Stage Comp command on the Options menu on the Stage Composition tab.</p>
<p>Recertification (06 transactions)</p> <p>Within the context of the interface, these transactions are initiated when a person is added or end-dated from a CONNECTIONS stage, requiring a recertification transaction (06) of the linked WMS case. In these instances, recertification of the linked WMS Services case will involve updating the authorization and/or payment periods on the DIR (and POS, if necessary) screen.</p>	<p>Add or End Date Person</p> <p>A person is added or end-dated (deleted) in the Stage Composition tab of a CONNECTIONS Family Services Stage. These CONNECTIONS operations will require recertification transactions (06) in WMS.</p>

Table of Comparable Terms

WMS	CONNECTIONS
<p>Services Types 01 and 08</p> <p>Service Type 01 refers to adoption services. The child will be the only member of the WMS case. Currently, the 01 case is not initiated in CONNECTIONS.</p> <p>An 08 Services Type refers to foster care services—more than one child may be involved in such a case. These codes are entered on the DIR screen in WMS.</p> <p>The combination of 01 and 08 indicates that the child is legally freed for adoption, receiving both foster care and adoption services, but not yet adopted—the equivalent of the Child Case Record (CCR) in CONNECTIONS.</p>	<p>Child Case Record</p> <p>The Child Case Record is created when a child is legally freed for adoption. This is a completely separate type of FSS; every child who has been freed, including those who might not be placed in an adoptive setting, has a separate CCR. Each CCR will also have its own corresponding WMS case (Service Type 01 and 08 combined).</p>
<p>Undercare Maintenance (05 transactions)</p> <p>Within the context of the CONNECTIONS/WMS interface, undercare maintenance refers to the process of updating demographic information in CONNECTIONS.</p>	<p>Change Demographics</p> <p>Change Demographics refers to changes in:</p> <ul style="list-style-type: none"> • Name (first, middle, last, suffix), • Date of Birth, • Sex, • Social Security number, and • Primary Caretaker's primary address (residence). <p>Changes are made and saved in CONNECTIONS on the Stage Composition tab.</p>
<p>WMS Help Desk</p> <p>1-800-342-3727</p> <p>Call for problems related to WMS only (e.g. Social Security number indicator).</p>	<p>Enterprise Help Desk</p> <p>1-800-697-1323</p> <p>Call for problems related to CONNECTIONS or the CONNECTIONS/WMS interface (e.g. CCRS indicator is incorrect).</p>
<p>WMS Inquiry</p> <p>WMS Inquiry is used to search the WMS database for a person's history of Services <i>and</i> Non-Services cases. The inquiry will yield information concerning a person's involvement in open, closed, and denied cases.</p> <p>WMS Inquiry is also used to check on the status of a WMS application, pending record, or active case.</p>	<p>Case Search</p> <p>Case Searches are conducted from the <i>Case Search Criteria</i> window, which is opened via the Case button on the CONNECTIONS Toolbar. A Case Search is a direct route to case information when you know the Case ID number, Stage ID number (Case ID and Stage ID are unique, system-generated numbers) or Case Name. When searching by Case Name, the search criteria must <i>exactly</i> match the CONNECTIONS Case Name in order for the search to return a match. Other names in the Case Composition for that case will</p>

Table of Comparable Terms

WMS	CONNECTIONS
	<p>not return.</p> <p>Person Search</p> <p>Person Search is a tool for locating information about people in CONNECTIONS. Person Searches are used to find out if a person is known to CONNECTIONS and find specific information about a person in CONNECTIONS. If a person is known to CONNECTIONS, a worker may be able to view a list of previous cases related to that person, depending on the worker's security rights (e.g., role, Business Function).</p>

Application Registration - The process initiated in CONNECTIONS when stage composition data is recorded, the Primary Caretaker is selected, and the **WMS App Reg** button is clicked. CONNECTIONS populates the shared data fields on WMS screen WK1 and directs the Application Registry Report and Clearance Report to the WMS printer.

Application Status - Indicates whether an application record in WMS:

- is available for Full Data Entry ("AVAIL"); or
- has completed Full Data Entry ("FDE-COMP").

Case Opening - Post-Full Data Entry process of entering data on the DIR (and, if necessary, POS) screen in WMS. The application progresses to a "new case" pending record after FDE and does not become an active WMS case until DIR (and, if necessary, POS) screens have been transmitted, batch processing has been completed, and an authorization generated.

Full Data Entry - The process of completing *at least* the WK2 screen in WMS. The application progresses to a "new case" pending record after data entry of the WK2 screen. WMS considers FDE complete once the WK2 screen has been successfully transmitted and batch processed, although a worker will typically go on immediately to open the WMS case by authorizing direct services (DIR screen) and payment lines for purchased services (POS screen).

Pending Record - A WMS application establishes a "new case" pending record once the WK2 screen is completed in WMS. Recertification "06" and undercare "05" transactions establish a "case" pending record once the WK2, DIR and POS screens are entered to WMS. After completion of batch processing update without error, the pending record progresses to an active case with no pending data. The new or changed WMS case is then said to be "ACTIVE, NO PEND."

Pending Status - Indicates whether a pending record exists for a new or existing WMS case. The status of the pending record is awaiting data entry, awaiting error correction, or awaiting batch processing. If a WMS case is in No Pend status, changes made in CONNECTIONS will update automatically in WMS when the **Save** button on the **Stage**

Composition tab or the **WMS Synch** button on the *Family Services Stage* window is clicked.

(If a Non-Services case has discrepant information, WMS will not permit the CONNECTIONS data to over-write information in the Non-Services case: CONNECTIONS and WMS will remain out of synch until the discrepancies are resolved.)

Session - The interval from sign-on to sign-off constitutes a session in CONNECTIONS or WMS. For local district workers, multiple adds, end-dates/deletes or demographic changes can be performed during a session, as long as adds and end-dates/deletes are performed prior to demographic changes.

Shared Fields - Data fields kept in synch by the interface between CONNECTIONS and WMS. These are:

- Case Initiation Date
- Office/Unit/Worker (Case Manager)
- Service Indicator
- Demographic information: Name (first, middle, last, suffix); Sex; Date of Birth, Social Security number
- Primary Caretaker's (primary) address
- CONNECTIONS Primary Caretaker (WMS Case Name)
- Case Type

WMS Case Status - Can be Active, Denied, or Closed. Case Status should not be confused with Pending Status.

Appendix D: WMS Pending Data Status Chart

WMS SCREENS	DESCRIPTIONS	PENDING DATA STATUS
NEW CASE OPENING		
Initiated in CONNECTIONS – click App Reg button		
WMS application record exists	Application Status = AVAIL	N/A
WK2 Screen		
WK2 entry complete	App Status = FDE-COMP, SFED/T To Be Printed	AW/SFED Awaiting SFED Entry
WK2 screen error	WMS Errors Detected	SFED/ERR SFED Entry Awaiting Error Correction
DIR or DIR + POS Screens		
DIR or DIR + POS entry completed	Before batch update	AT/FDE Awaiting Transmission After Full Data Entry
DIR or DIR + POS error free	After batch update	NO PEND No Pending Data Exists
DIR or DIR + POS errors in WMS	Before file maintenance	FDE/ERR FDE Awaiting Error Correction
POS errors in BICS	After file maintenance	FDE/ALEC FDE Awaiting Local Error Correction
UNDERCARE CHANGES, RECERTIFICATIONS & CLOSINGS		
Initiated in CONNECTIONS – click Save or WMS Synch button		
WMS pending record exists	Add a person	UM/CL Awaiting Clearance Resolution
WMS pending record exists	Delete a person	A/SFED-M Awaiting SFED Maintenance
WMS pending record exists	Demographic change	AT/UM Awaiting Transmission after Undercare Maintenance
WK1, WK2, DIR and POS Screens		
WK1, WK2, DIR and/or POS entry complete	Before batch update	AT/UM Awaiting Transmission After Undercare Maintenance

WMS SCREENS	DESCRIPTIONS	PENDING DATA STATUS
WK1, WK2, DIR and/or POS error free	After batch update	NO PEND No Pending Data Exists
WK1, WK2, DIR and/or POS errors in WMS	Before file maintenance	UM/ERR Undercare Maintenance Awaiting Error Correction
POS errors in BICS	After file maintenance	UM/ALEC Undercare Maintenance Awaiting Local error Correction