NEW YORK STATE | Office of Children and Family Services

CONNECTIONS Tip Sheet

CPS Intake

Revised October 2015

Things to Consider Before Accepting, Rejecting, or Re-assigning a Primary Assignment on a Report from the SCR:

- Review the Intake Report.
- If the report is an Initial (INI) and the address of the MA/AB child is in your county/jurisdiction, **accept** the report. If it is not in your jurisdiction, **reject** the report.
- If the report is a Subsequent (SUB) because the case appears open in CONNECTIONS in your county, but services are no longer being provided and the family no longer lives in your jurisdiction, complete the following steps:

  Same Business Day:

  - Close the case in CONNECTIONS.
  - Void the Pending Merge (see section **A**, right).
  - Call the county where the family currently resides. If the county where the family now resides agrees with the re-assignment, **accept** the report and reassign.
  - Otherwise, **reject** the report with the following rejection reason: *"Case #12345… is closed. Family no longer resides in District (#99)."*

  If the report is transmitted after normal business hours and is acknowledged in CONNECTIONS the next business day:

  - Perform a Case Split (see section **B**).
  - Call the county where the family currently resides. If the county where the family now resides agrees with the re-assignment, **accept** the report and reassign.
  - Otherwise, **reject** the report with the following rejection reason: *"Case #12345… is closed. Family no longer resides in District (#99)."*
  - The following day, close the case in CONNECTIONS.

(A) Void a Pending Merge – Same Business Day

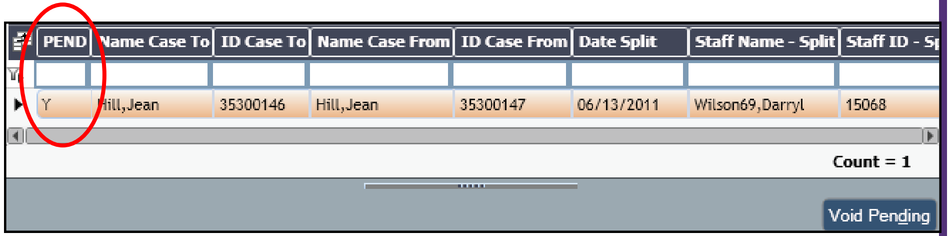
Voiding a Pending Merge on the same business day changes a Subsequent (SUB) report to an Initial (INI), with a new Case ID number.

1. From the **My Workload** tab, select the case you wish to void and click on the **Case Summary** link in the navigation pane.

   The Case Summary window displays.

2. Select the Stage Name and click on the **Case Merge/Split** link in the navigation pane.

   *The Case Merge/Split window displays with a **Y** in the Pending column for the report to be merged.*



3. Select the report and click on the **Void Pending** button.
4. Click on the **Save & Close** button.

   The Case Summary window displays.

5. Click on the red **X** in the upper right to return to the **My Workload** tab.

The pending merge has been voided.

(B) Case Split – Next Business Day

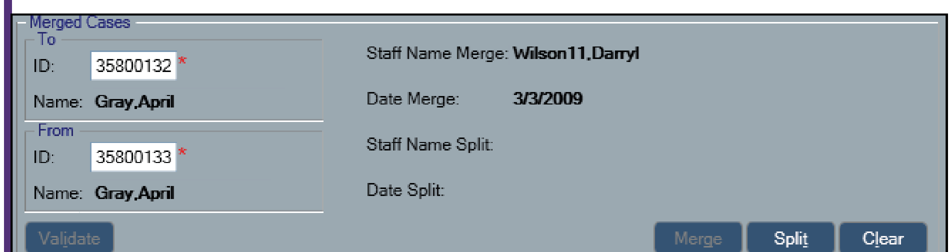
Case Split – Next Business Day creates a separate Case ID number for jurisdictional reassignment. Case Split is used when a report has been merged to an existing Case ID number through the overnight batch update process.

1. From the **My Workload** tab, select the case you wish to split and click on the **CASE Summary** link in the navigation pane.

   The Case Summary window displays.

2. Select the Stage Name and click on the **Case Merge/Split** link in the navigation pane.

   The Case Merge/Split window displays.



3. Select the report from the window grid (you will notice that two separate Case ID numbers will display) and click on the **Split** button.
4. Click on the **Save & Close** button.

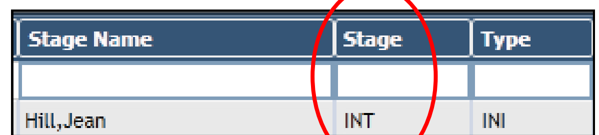
   The Case Summary window displays.

5. Click on the red **X** in the upper right to return to the **My Workload** tab.

The case has been split and a separate Case ID number was created.

When should you progress an Intake report?

- If you see **INT** in the assignment's **Stage** column on the *Assigned Workload*, you need to progress the stage (see section **C,** below).



- **INV** in the **Stage column indicates that** the stage has already been progressed.

Duplicate reports do not get stage progressed (see section D).

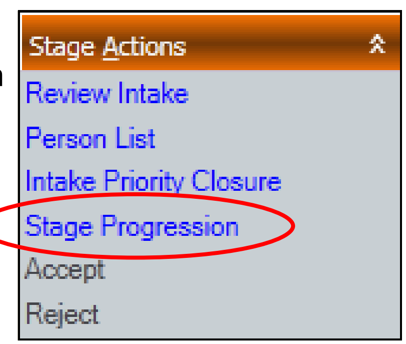
(C) Progressing a Stage from Intake to Investigation

Note: A stage must be accepted before it can be stage progressed.

1. From the **My Workload** tab, select the Intake (**INT**) case/ stage you wish to progress.
2. Click on the **Stage Progression** link in the navigation pane.

   The Stage Progression window displays.

3. Click on the **Save & Close** button.



The following message displays: "This will create a new stage of service. Remember to reassign. Continue?"

4. Click on the **Yes** button.

   *The **My Workload** tab displays.*

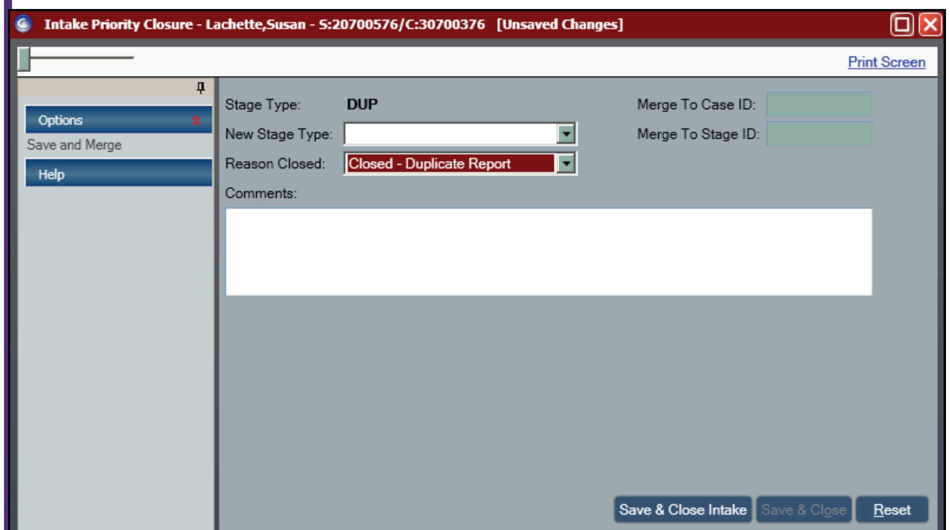
The stage has progressed from Intake (**INT**) to Investigation (**INV**).

(D) Closing a Duplicate Report

1. From the **My Workload** tab, select the duplicate case you wish to close and click on the **Intake Priority Closure** link in the navigation pane.

   The Intake Priority Closure window displays.

2. Click on the drop-down arrow for the *Reason Closed* field and select **Close Duplicate Report**.



3. In the *Comments* field, record: "For information regarding the allegation contained in this associated Intake Report, please see the Investigation Summary Report for Investigation (INV) Stage ID # _____."

4. Click on the **Save and Close Intake** button.

   *The Intake Priority Closure window closes and the **My Workload** tab displays.*

The duplicate report no longer appears on the workload, but may be viewed from the **Case/Stage Events** tab.

Resources

- CONNECTIONS Job Aids and Tip Sheets:

  http://ocfs.state.nyenet/connect/jobaides/jobaides.asp

- CONNECTIONS Regional Implementation Staff:

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

- CONNECTIONS Application Help Mailbox:

  ocfs.sm.conn_app@ocfs.state.ny.us
  (NOTE: address contains an underline)

- CONNECTIONS Communications Mailbox:

  connectionsi@ocfs.ny.gov

ITS Enterprise Service Desk
1-800-697-1323