



# CONNECTIONS Tip Sheet

## Foster Home Transfer Procedures rev. November 2012

### FBH Transfer – Different Vendor ID – *Sending Agency* Responsibility

- Applies to foster homes transferred from a voluntary agency to another agency or a local district or from a local district to an agency.
- The *Sending Agency* obtains the name of the Receiving Agency Liaison staff person to coordinate the transfer of home(s) and the Vendor ID(s) that the *Receiving Agency* will assign to the home(s).

### Record a New Vendor ID (*Sending Agency* worker)

1. Select the FAD stage on the workload and click on the **Home Demographics** link in the navigation pane.
2. On the Home Demographics window, record the new Vendor ID number obtained from the Receiving Agency in the **Vendor ID** field.
3. Click on the **Validate** button and then the **Accept** button (even if there is no change in address).
4. Click on the **Save & Submit** link in the navigation pane.
5. On the To Do Detail window, explain that Vendor ID is being changed per Receiving Agency in the Comments field.
6. Click on the **Save & Close** button.

### Approve the New Vendor ID (*Sending Agency* Unit Approver)

1. From My To-Dos, locate the appropriate approval to-do labeled: **\$\$\$Approve Primary and/or Business Address Change** and click on the **Navigate** link.
2. On the Resource Address Detail window, verify in the upper grid that the correct Vendor ID was entered.
3. Close the window by clicking on the red **X**.
4. On the Approval Status window, select the item to be approved and click on the **Approve** button.
5. Click on the **No** button on the resulting message box (or if another approver is needed, click yes and submit the to-do).
6. Scroll down (If needed) and click on the **Save & Close** button.

**Note:** It is necessary to wait until the next business day after approval of the new Vendor ID to assign a new Primary worker.

### Assign a new Primary Worker (*Sending Agency* worker)

**Note:** Un-assign any workers with Secondary role assignments before proceeding to this step.

1. Select the FAD stage on the workload and click on the **Assign** link in the navigation pane.
2. On the Assign window, click on the **Staff Search** link in the navigation pane.
3. Enter the Receiving Agency worker's name in the **First** and **Last Name** fields and the Agency Code in the **Agency** field then click on the **Search** button.
4. On the Staff Search window select the worker and click on the **OK** button.
5. On the Assign window, select the worker from the Available Staff list and click on the **Primary** button.
6. A pop-up notice confirms removal of primary worker, click **Yes**
7. Click on the **Save & Close** button.

### FBH Transfer – Different Vendor ID – *Receiving Agency* Responsibility

The *Receiving Agency*:

- Identifies a responsible Agency Liaison staff person to coordinate the transfer of home(s).
- Provides the *Sending Agency* the Vendor ID(s) that will be assigned to the home(s).
- Completes the Home Study for a transferred FAD Home(s) in Accepted – Active Status.

### Complete the Home Study (*Receiving Agency* Worker)

1. Select the FAD home on the workload and click on the **Home Study** link in the navigation pane. Click **Use Prior** if the message box prompting a New or Use Prior choice displays.
2. Click on the **Home Study Narrative** tab and select Agency Transfer in the **Reason(s) for Home Study** field.
3. Click on the **Retrieve/Edit Narrative** button.

4. If appropriate, complete/modify the Home Study
5. Click on the **File** menu and select Close.
6. Click on the **Yes** button to save.
7. Click on the **Submit** button. *The Home License window displays.*

#### Change Home Status

1. On the Home License window, select Pending Acceptance in the **Status** field.  
**Note:** Review the Authorization dates. Recertification tasks must be completed prior to the certification **To Date**. Recertification may begin (within 90 days of the current certification **To Date**).
2. Click on the **Save and Submit** link in the navigation pane.
3. On the To-Do Detail window, make sure the to-do is assigned to the appropriate worker/supervisor and click on the **Save & Close** button.

#### Change Agency Designation

1. With the FAD stage selected on the workload, click on the **Home Demographics** link in the navigation pane
2. Verify the new agency designation in the **Auth. Agency** field.

#### Verify Vendor ID

This step cannot be completed until after the Home License has been submitted for approval.

1. With the FAD stage selected on the workload, on the Case To-Do tab, locate the appropriate Approve Primary and/or Business Address Change to-do and click on the **Navigate** link.
2. On the Resource Address Detail window, verify that the correct Vendor ID displays in the grid at the top.
3. Close the window using the red **X** in the upper right corner.
4. On the Approval Status window, select your name and click on the **Approve** button.
5. Click on the **No** button in the resulting message box (or if another approver is needed, click yes and submit the to-do).
6. Scroll down (If needed) and click on the **Save & Close** button.

#### Approve the Home License (*Supervisor/Unit Approver*)

This function approves the agency acceptance of the transferred home.

1. From My To-Dos, locate the appropriate Approve Home License to-do and click on the **Navigate** link.

2. Click on the **Licensing** tab, review the information. And then click on the **Close** button.
3. On the Approval Status window, select the item to be approved and click on the **Approve** button.
4. Click on the **No** button on the resulting message box (or if another approver is needed, click yes and submit the to-do).
5. Scroll down (If needed) and click on the **Save & Close** button.

#### Change the Authorization From Date

This step is needed if the approval was completed after the effective date of transfer. It may only occur at least one day after the above mentioned approvals. **Note:** The MAINT FAD HIST business function is required to adjust the home history.

1. Select the FAD stage on the workload and click on the **Home History** link in the navigation pane.
2. On the FA Home History window, select the most recent historical record on the grid.
3. Click **OK** on the resulting message box.
4. In the Home History Detail section, change the Auth. From date to the effective date of transfer.
5. Scroll down if needed and click on the **Save & Close** button.
6. With the FAD stage selected, select the **Licensing Information** link in the navigation pane. Take note of the new **From Date**.
7. Change the home status to Pending Acceptance in the **Status** field.
8. Click on the **Save & Submit** link in the navigation pane.
9. On the To-Do Detail window, click on the **Save & Close** button.

It is good practice to conduct a Resource search to verify that the FAD home is now active with your agency with the correct Vendor ID.

#### Review/Update Fingerprint Information

1. With the FAD Stage selected, click on the **Person List** link in the navigation pane.
2. On the Person List window, select the person.
3. Click on the **FA Home Person Detail** tab and review/update fingerprint information.
4. If needed, scroll down and click on the **Save & Close** tab  
**Note:** Remember to complete the "Notice to NYS OCFS of Foster Home Transfer Between Agencies" and submit it to OCFS.

5. Print a *new* Certificate to Board for Foster Boarding Homes or Print a *new* Approval Letter for Approved Relative Homes.

### **FBH Transfer – Same Vendor ID – FAD Home is in Inquiry or Applicant Status**

- Applies to foster homes transferred between local districts; the home does *not* require a new Vendor ID.
- As appropriate, complete the Home Study process and all unmet requirements.
- The home must be fully certified/approved to change the authorized agency designation.

### **ACS Office of Placement Administration Transfer Procedures**

1. The ACS Office of Placement Administration (OPA) creates the Emergency home in CONNECTIONS.
2. The OPA worker assigns the Vendor ID, modifies any information, completes the F/A Home License window and submits the new foster home/stage to her/his supervisor for approval.
3. Once the OPA supervisor approves the Emergency Approved Relative Foster Home, the home status changes to Emergency. The home is approved for a 90-day period.
4. Once the OPA supervisor determines whether the Division of Foster Care (DFCS) or a contract agency will supervise the home, the home is transferred to the appropriate Receiving Agency.

**Note:** The transferred home does *not* require a new Vendor ID.

5. Upon receipt of a transferred FAD home, the Receiving Agency changes FAD Home Status:
  1. Select the FAD stage on the workload and click on the **Licensing Information** link in the navigation pane.
  2. Select **Pending Emergency** in the **Status** field,
  3. Click on the **Save & Submit** link in the navigation pane.
  4. On the To-Do Detail window, verify the to-do is assigned to the appropriate approver.
  5. Click on the **Save & Close** button.

### **Re-Opening a Foster Home – Generating a Different Vendor ID**

This procedure pertains to re-opening a home closed by a *different* agency or district. Generation of a new Vendor ID is *not* required when a home is re-opened by the same district or agency that closed it.

#### **Re-Open Closed Home**

1. Select **F/A Home** on the **Intakes** dropdown menu.

2. On the F/A Home Search window, enter the home name in the **Home Name** field and clear your agency code from the **Agency ID** field.
3. Click on the **Search** button.
4. Select the foster home from the search results. *Make sure the home meets your selection criteria.*
5. Click on the **Re-open Closed Home** link in the navigation pane.
6. Select **Inquiry** or **Applicant** as appropriate in the **Change To** field.
7. Click on the **Save & Assign** link in the navigation pane.
8. In the Available Staff section of the Assign window, click on the name of the worker who will have primary responsibility for the foster home/FAD stage.
9. Click on the **Primary** button.
10. Click on the **Save & Close** button.

### **Change Vendor ID**

1. Access the designated worker's workload.
2. Select the FAD home and click on the **Home Demographics** link in the navigation pane
3. Record the new Vendor ID in the **Vendor ID** field and click on the **Validate** and then the **Accept** button.
4. Click on the **Save & Close** button.
5. As appropriate, complete the Home Study process and all unmet requirements. The home must be fully certified/approved to change the authorized agency designation.

**Note:** All WMS/CCRS requirements must be completed regarding new POS line(s) and legal movement(s) for *new* Vendor ID changes.

### **Resources:**

OCFS CONNECTIONS Internet site:  
<http://www.ocfs.state.ny.us/connect/>

CONNECTIONS Regional Implementation Staff:  
<http://ocfs.state.ny.us/connect/contact.asp>

CONNECTIONS application questions  
[ocfs.sm.conn\\_app@ocfs.state.ny.us](mailto:ocfs.sm.conn_app@ocfs.state.ny.us) (NOTE: address contains an underscore)

NYS ITS Customer Care Center: 1-800-697-1323

**Reminder: In all areas of CONNECTIONS, you can press F1 for help**