

Changes to the Permanency Hearing Report User Guide for Attorneys

Background:

The NYS Office of Children and Family Services (OCFS) has made several improvements to the Permanency Hearing Report (PHR). The new PHR makes it easier for caseworkers to complete the report and easier for judges to read it. The updated PHR also supports the “on-line” review of a draft PHR by supervisors, quality assurance staff and attorneys. This feature makes printing a draft PHR unnecessary and also helps to make certain that what is stored in CONNECTIONS matches what is provided to the court.

This user guide augments “elbow” training provided by OCFS regional staff to attorneys in local districts where attorneys review draft PHRs and will do so using the new on-line review process. If you have a question about the content of the training or of this guide, please send an email to: ocfs.sm.conn_app@ocfs.state.ny.us.

Note: This guide contains several screenshots that contain data. This data is fictitious and is presented for demonstration purposes only.

Security and Confidentiality

CONNECTIONS Security Information is located at: <http://ocfs.state.nyenet/connect/security/>

General Information Security and portable device security information is located at: <http://ocfs.state.nyenet/it/security/>

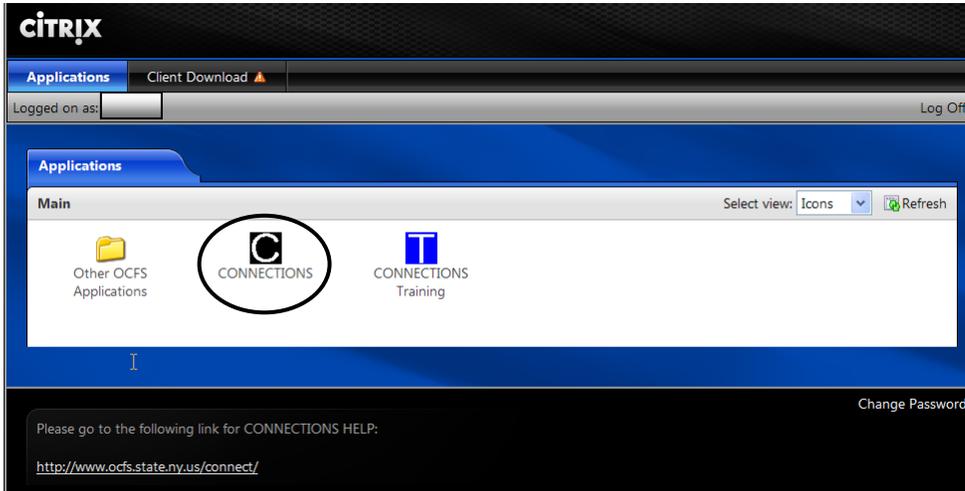
Logging onto CONNECTIONS

This section assumes that you will access CONNECTIONS from a PC that is not joined to the Human Services Enterprise Network (HSEN); but from another local network such as a county network via a secure Internet connection.

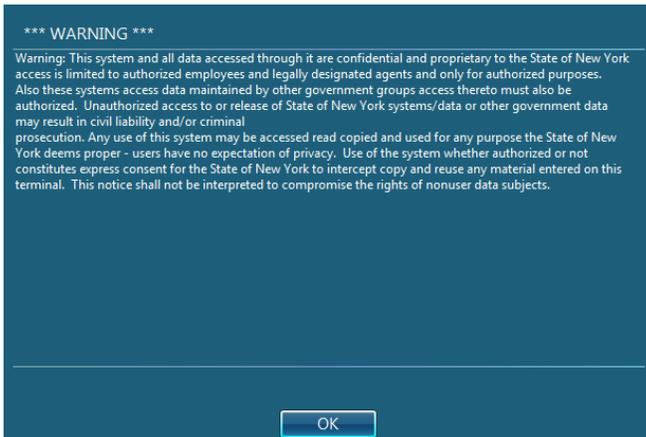
1. Enter <https://connections.ocfs.ny.gov> into the address bar of your Internet browser (try just Ctrl + clicking the above link). You may wish to save this address to your desktop or to your Favorites.
2. You will arrive at the following screen; enter your user name and password and click on the **Log On** button.



3. After logging in, you will arrive at the Citrix Applications Page. If you are using a PC that has never accessed CONNECTIONS, you will need to follow the instructions in Appendix A.
4. On the **Applications** tab, double-click on the CONNECTIONS icon.



5. Make note of the security message and click on the **OK** button

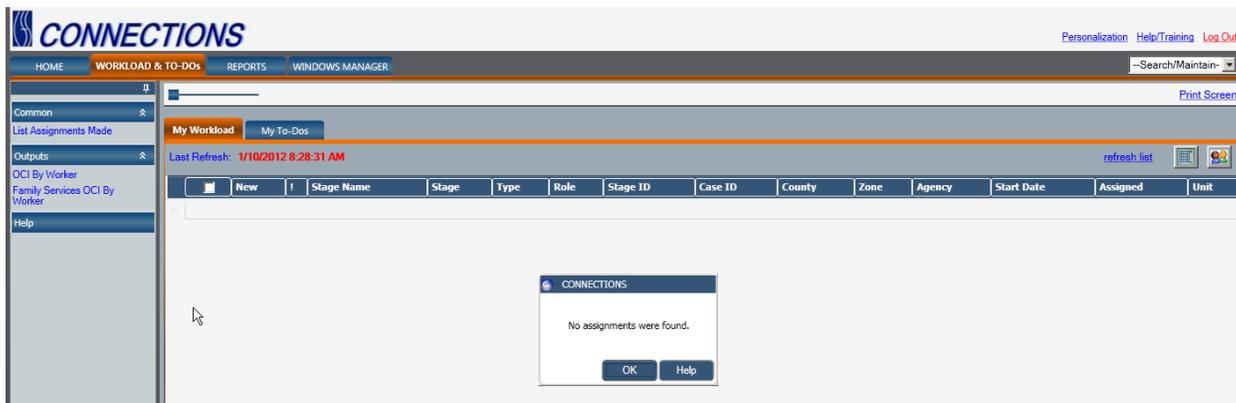


6. Click on the CONNECTIONS application icon. *The main CONNECTIONS window will open.*

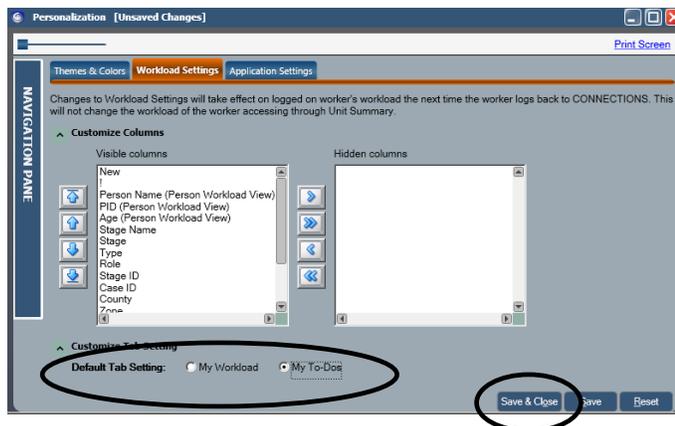


Personalizing Your Main CONNECTIONS Window

7. On your first entry into CONNECTIONS, you will be presented with the following screen. The **WORKLOAD & TO DOS** tab and the **My Workload** sub-tab will be active.



8. Click the **OK** button on the message. In all likelihood, you will not be assigned cases or have a workload in CONNECTIONS. Rather, you will be assigned To-Dos requesting that you review a PHR. Therefore, it is recommended that you re-set your entry window so that the **My To-Dos** sub-tab (which lists to-dos assigned to you) will display upon log-in. To do so:
 - a. Click on the [Personalization](#) link in the upper right of the main window.
 - b. On the Personalization window, click on the **Workload Settings** tab and then click on the **My To-Dos** radio button in the **Default Tab Setting** field.
 - c. Click on the **Save & Close** button.

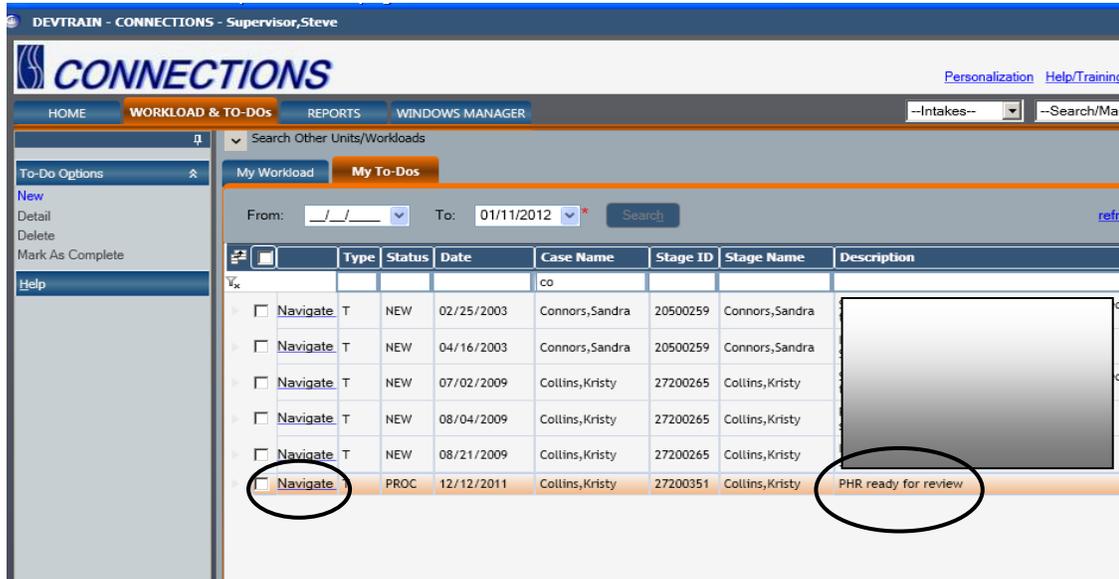


- d. You will return to the main CONNECTIONS window with the **My Workload** tab displaying. The change you made will take effect on your next log-in and will remain in effect unless you change it. For now, click on the **My To-Dos** tab.

Note: Next to the [Personalization](#) link is the [Help/Training](#) link. This link will bring you to various resources to assist you, including the *How Do I* instructions for the PHR.

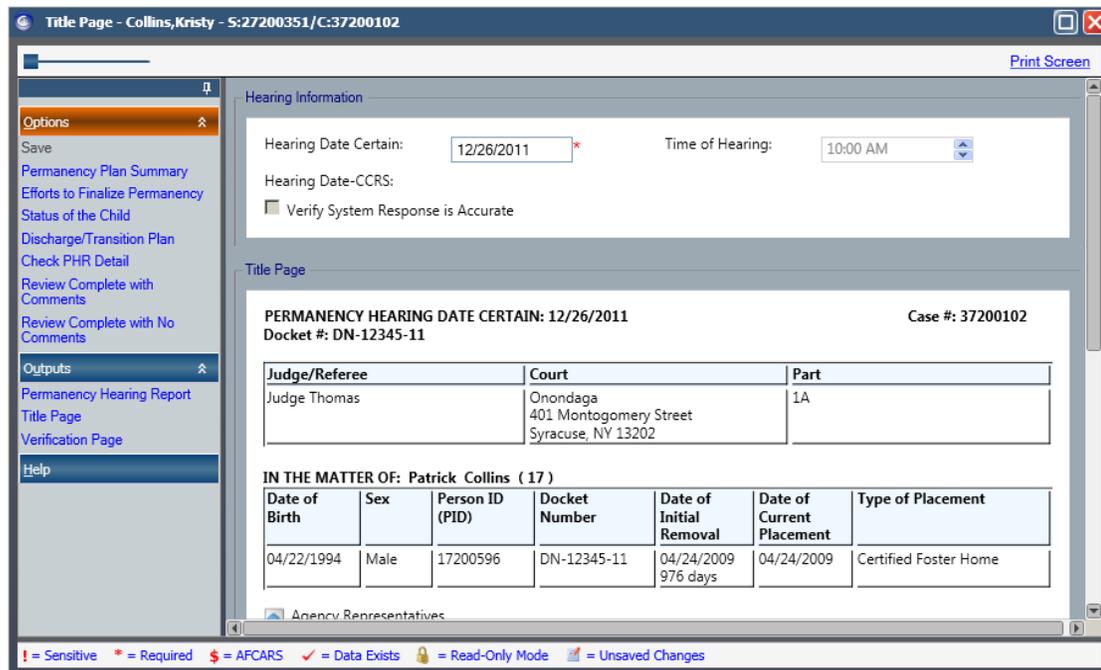
Reviewing a PHR

- When a caseworker submits the PHR to you for review, you will receive a To-Do with the Description: PHR Ready for Review. On your To-Do list, click on the Navigate link in the row that contains the desired To-Do.

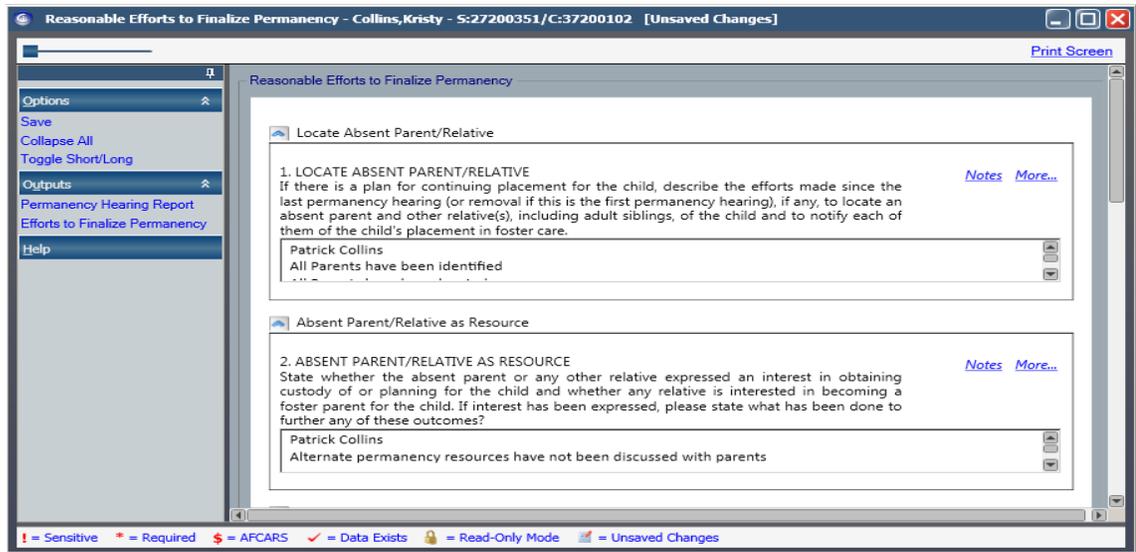


- You will be brought to the Title Page of the PHR associated with the selected To-Do. You will be able to **view** all the contents of the draft PHR, however, you will not be able to modify any data. You will communicate comments/edits via the use of Sticky Notes (see below).

The Title Page contains basic data about the report. Use the scroll bar to the right to view the entire Title Page. Use the links in the left navigation pane to open the other sections of the report.



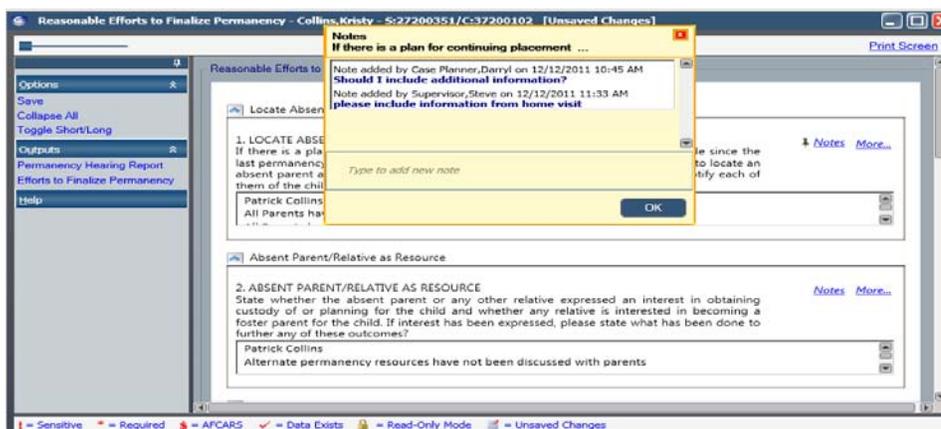
11. When you click on a section link (e.g., Reasonable Efforts to Finalize Permanency), you will be brought to the section window. All of the questions/responses for the section will populate your screen, although most will be hidden. Use the vertical scroll bar to the right of the window to view all window contents. The Collapse All link in the left navigation pane collapses all of the questions and you can open each one as you proceed with your review to minimize scrolling. Use the chevron to the left of a question title to open and close it.
12. The responses to PHR questions display in a panel below the question. You may use the vertical scroll bar to the right of the panel to review the full response content or else click on the More link which opens the response in a full screen. Click the “X” button at the top right of the “more” window to return to the PHR section window.



13. To write comments for any long narrative field, click on the Notes link. A yellow Notes window will display. Type your comments on the Notes window and then click on the **OK** button. It is necessary for you to save the Notes you write for each PHR section. Click on the **Save & Close** or **Save** button at the bottom of the section window.

The pushpin icon  Notes indicates that notes are present. This might reflect communication between caseworker and supervisor. You may add onto previous notes.

Notes written by you and others will be deleted once the PHR is marked as final. They are not displayed, even if a draft report is printed.



14. When you have completed your review, return to the Title Page by clicking on the **Save & Close** button at the bottom of the section window.
15. Click on one of the two Review Complete links in the left navigation pane (With or Without Comments). This will automatically generate a To-Do to the caseworker who submitted the PHR for your review. **Note:** the To-Do requesting that you review the PHR is automatically deleted from your To-Do's list.
16. You will be returned to the main CONNECTIONS window (**My To-Dos** tab). If you wish to exit CONNECTIONS:
 - a. Click on the **Log Out** link at the top right of the main CONNECTIONS window.
 - b. On the next screen, click on the **Start** button (not the bright green **Start** button at the very bottom left of your screen) to fully exit the CONNECTIONS.

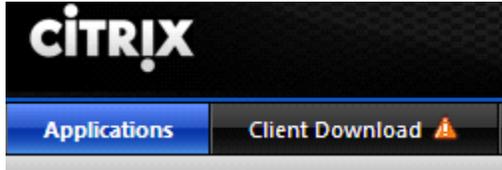


Appendix A

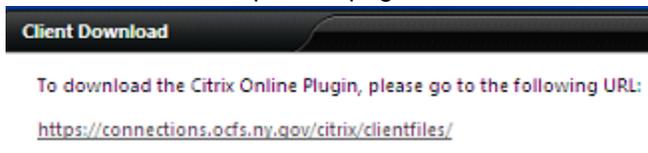
How to Install Citrix Files on your own computer

After logging in:

1. Click on the Client Download Tab at top of page:



2. Click the link at the top of the page:



3. Choose the top link (Version 11.2) if you have Windows XP on your PC.
4. If you have Window Vista or Windows 7, choose the 3rd link. Both are clearly displayed on the page.
5. For EVERY message box that pops up in the process, click all responses that are affirmative such as Run, Yes, Install, Download, Always, etc.
6. After all the pop up boxes are done and the installation is complete, click on the **BACK** button, top left corner of your Internet Explorer window. You should be back on the page with the 2 tabs for CITRIX with Applications & Client Download.
7. Click on the Applications tab
8. Return to page 2, step 4 of this user guide.