



# CONNECTIONS Tip Sheet

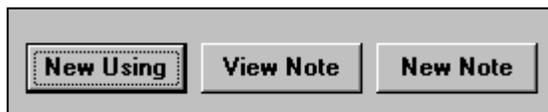
## Progress Notes: Create and Modify

rev Dec 2010

### Creating a Progress Note

1. Select a CPS Investigation stage (INV) or Family Services stage (FSS) from your workload.
2. Select the **Progress Notes** link on the **NAVIGATION PANE**,
  - In an **Inv** stage, the *Child Protective Record Summary (CPRS) window displays with the Progress Notes tab active.*
  - In an **FSS** stage, the *Progress Notes window displays. When you close the window, you return to your workload.*

The *Progress Notes* window is comprised of three sections: the Search Progress Notes fields at the top of the window, the search results grid in the middle, and buttons along the bottom.



3. To create a new note, click on the **New Note** button (or select from the **Options** menu). *The Progress Notes Detail window displays.*
4. To create a note with New Using, select a note from the grid and click on the **New Using** button (or select from the **Options** menu). *The Progress Notes Detail window displays with the **Type, Method of Contact, Location of Contact, Other Participant** and **Purpose** fields pre-filled with the values from the selected progress note.*
5. When creating a note, enter the **Event Date**. The default date appears. By clicking on the drop-down box, the calendar appears and an alternate date can be chosen. You may also click the checkbox and enter a date. Some districts require the time be entered as well.
6. Complete the **Type, Method of Contact** and **Purpose** fields.
7. After completing and/or modifying the fields, use the checkboxes to indicate family participant(s). When a family member has been chosen as a participant, the **Focus** field will automatically be pre-filled with the family member as a focus. If a family member participated but was not a focus of the contact, the focus field must be manually unchecked. The **Focus** boxes can be used to indicate someone who was not present at

the time, but was the focus of the contact. You can click the **All** button to save time, if appropriate to the contact.



**IMPORTANT!:** Enter any identifying information related to contacts with the **reporter/source** of a CPS investigation in INV stage progress notes **only**. Use the **Other Participant** data field, with the value of **Reporter/Source**. This restricts access to the note.

8. Enter narrative by clicking inside the text box field. *The narrative field features a text control tool that provides you with formatting functions similar to those available in Microsoft Word.*



**Note:** You can also use hot keys (**Ctrl C** for copying, **Ctrl V** for pasting).



**Note:** Do not cut and paste graphics, letterhead, logos, scanned documents, email with special formatting, and templates into your notes as these may corrupt the note and hinder your ability to review and print them.

9. To save the note to the stage, click on either **Save as Draft** (allows modifications for up to 20 days) or **Save as Final** (freezes on save).
10. To save this note and create a new note within the same stage, click on **Save and Enter New Note** button.

*A pop-up message says, "Changes Have Been Saved." Click **OK**. The system saves the note in Draft status. Repeat the steps to complete an additional note.*

**Note:** The save buttons enable only after you have entered a narrative.

## Editing Progress Notes

11. Progress notes may only be edited if they are in Draft status. Select the Draft note to be modified from the grid of existing notes on the *Progress Note* window and click on **Edit Note** button.

*If you attempt to change **Type**, a pop-up message appears, "Changing the Type of Contact will clear all user entered data with the exception of the narrative, Event Date, Event Time and Author. Do you wish to continue?" Click **Yes** to modify Type.*

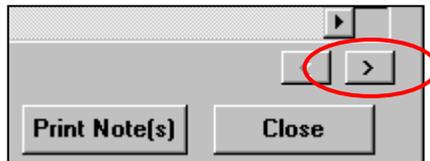
12. Progress notes in Draft status may also be deleted by the persons who entered or authored them. Select the Draft note to be deleted from the grid of existing notes and click on **Edit Note** button, then select the **Delete Draft Note** command from the **Options** menu.

*A pop-up message appears, "Are you sure your wish to delete the Progress Note?" Click **Yes** to delete the note.*

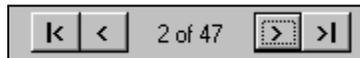
13. If the Progress note is in Final status, it cannot be modified. You may add to it, however, by using the Add Addendum feature. Highlight the desired note from the grid of existing notes and select the **Add Addendum** command from the **Options** menu.

## Viewing Progress Notes

- Only the most recent 200 notes appear on the grid on the *Progress Notes* window. If a stage contains more than 200 progress notes, you can view them by clicking on the arrow at the bottom right side of the window.



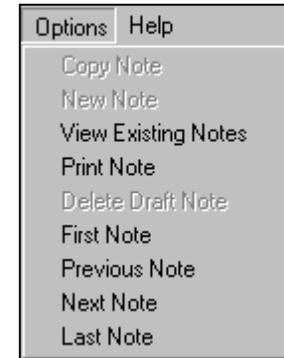
- If the grid on the *Progress Notes* window contains more than one progress note, and you click the **View Note** button, a notes advance set of buttons appears on the *Progress Notes Detail* window.



The number of entries on the Progress Notes grid appears as does the number of the note that is currently displaying, i.e., "2 of 47" as the second of

47 notes. Click the far left button  to display the first note in the grid; the far right button  to display the last note; and the arrow buttons  and  to advance or reverse the displayed progress note in numerical progression, depending on the direction chosen.

- The **Options** menu also displays choices for reviewing notes: **View Existing Notes, Print Note, First Note, Previous Note, Next Note, Last Note.**



- To view more than one note at a time, highlight the notes you wish to view or click on the **Select All** button.

Click on the **Print Note(s)** button. Select the format "**Data Fields and Narrative**". Select font size. Click **OK**.

The notes appear as a print preview. Use the scroll feature to view all of the note(s). When finished viewing, click the **Close** then the **Cancel** buttons.

**Note:** You can print the notes by clicking on the **Print** button in the preview window.

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

## Resources:

CONNECTIONS Step-By-Step Guides:  
<http://ocfs.state.nyenet/connect/jobaides/>

CONNECTIONS Regional Implementation Staff:  
<http://ocfs.state.nyenet/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 underline)

CONNECTIONS Communications  
[CONNECTIONSCommunications@dfa.state.ny.us](mailto:CONNECTIONSCommunications@dfa.state.ny.us)

NYS OFT Customer  
Care Center #  
1.800.697-1323