FREQUENTLY ASKED QUESTIONS

CONNECTIONS Questions and Answers

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Please Note: *This document is comprised of a running list of questions and answers from regional meetings, forums, teleconferences, etc.*

CONNECTIONS Questions and Answers

Section 1: INTERFACES

Question:

What happened to the WMS application that was produced when I clicked the APP REG button in CONNECTIONS? The application is no longer available.

Answer:

The WMS Services applications that have not been processed within 90 days of the last transaction date are at risk of being system withdrawn. Once the application is withdrawn, it will no longer be available; therefore it is important that the WMS case be opened within this 90-day window. Since WMS Services applications must be created through CONNECTIONS, in order to create a new WMS application after the 90 days, the FSS would need to be closed and a new FSS opened. This would allow the worker to create a new WMS application.
(Please note that if it becomes necessary to open a new FSS, the new FSS should be merged with the closed FSS).

Question:

What happens to the WMS case and the child's CCRS track when a child is freed for adoption and I create a CCR stage? Do I have to open a new WMS case and what actions should occur with the CCRS track?

Answer:

When an FSS/CWS stage is progressed to a CCR stage, the WMS case needs to be maintained. If the freed child was the only child tracked in the WMS case, that case should be closed. If there are other tracked children in the WMS Services case who continue to receive services, the child who is freed for adoption should be deleted from the active WMS Services case. A new WMS case is then opened using the APP REG button that enables in CONNECTIONS when the CCR is created. The freed child's CCRS track should be closed when the child is deleted or when the WMS case is closed. Once the new WMS case has been opened, the child's CCRS track should be re-opened using a tracking indicator of Y. The supplemental registration should reflect the CID date from the child's previous track. The track start date should be the day after the M999 was posted closing out the child's previous track.

Question:

What is used as the start date (application date in WMS) now that cases are initiated in CONNECTIONS?

Answer:

The WMS start date is pulled from the earliest of four dates in the FASP tab. The user must enter the trigger dates (date of placement, date of court order or date of application) (date of indication is system generated) prior to selecting the APP REG pushbutton. If users APP REG without filling in one of those CID trigger dates, CONNECTIONS will use the FSS stage creation date as the "default" CID. If the CID is changed after APP REG but before full data entry, the WMS case open date will change to the newly entered CID date.

Question:

What exactly is exchanged between CONNECTIONS and WMS?

Answer:

For a WMS case to be opened from CONNECTIONS, there must be a Family Services Stage created. This stage can either be a Child Welfare Services (CWS) type or a Child Case Record (CCR) type or, for New York City, Advocates Preventive Only (ADVPO) type. Once the Primary Care taker has been identified, the APP REG button appears to the LDSS worker. Once this button is pressed, the following information is sent to WMS immediately:

- Local District
- Case Manager for the FSS; Office/Unit/Worker from the Staff Detail window in CONNECTIONS.
- Application Date
- Case Type (Services = 40)
- Service Indicator
- Case Participant information
  - Primary Caretaker Name and address
  - Case participant demographic information: First Name, Middle Initial, Last Name, Suffix, Date of Birth, Sex and Social Security Number

Case Maintenance in CONNECTIONS will send the following information to WMS:

- Case Manager; Office/Unit/Worker
- Case participant demographic information (no address information is sent to WMS post APP REG)
  - Additions of people to the case
  - End-dating people in the case

Question:

What information is passed from WMS to CONNECTIONS?

Answer:

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 update via the nightly batch. CINS and the WMS services case number are also passed during the nightly batch process. Please Note: CINS may no longer be manually entered into CONNECTIONS; the WMS interface automatically updates CINS.

Question:

What is the impact of the CONNECTIONS/WMS interface on WMS?

Answer:

- Demographic changes must be made in CONNECTIONS
- A case that is known to CONNECTIONS cannot be closed in WMS while the CONNECTIONS case remains open.
- Clearance reports will be printed on the WMS printer when a case is initiated in CONNECTIONS.
- Full Data Entry is completed in WMS.
- Authorizations will be printed on the WMS printer every time you change information on the case.
- Line numbers in WMS are assigned by the order the case participants were entered on the intake window.

Question:

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On a WMS Services Authorization, what does a CCRS code C, Y or Z stand for?

Answer:

A **C** or a **Blank** in the CCRS indicator field means the cases are not linked. A **Y** means the case is known to CONNECTIONS and the CONNECTIONS case is closed. A **Z** means the case is known to CONNECTIONS and the CONNECTIONS case is open.

Question:

When does the APP REG button appear in CONNECTIONS?

Answer:

When the FSI is progressed to the FSS and the Primary Caretaker has been assigned, the APP REG button will appear on the Family Services Stage Composition screen.
When the CCR is created the APP REG button will appear.
The APP REG button is only visible to the LDSS worker.

Question:

When does the WMS SYNCH button appear in CONNECTIONS?

Answer:

The WMS SYNCH button appears on the FSS Stage Composition screen when:

- A VA has added or end-dated a person in the case.
- A change is made in CONNECTIONS and the transaction was subsequently cancelled in WMS (Cancel PEND).
- A change is made in CONNECTIONS and not sent over to WMS.

Question:

Is WMS case number the same as the application registration number?

Answer:

No. These are different numbers. Initially, when a worker does the APP REG, WMS returns a registration number that is assigned by the system. Then, after Full Data Entry, the WMS case number that is assigned by the data entry operator is displayed in CONNECTIONS.

Question:

Are there any alerts to remind the worker to complete WMS APP REG and WMS SYNCH? Will there be any reminders if the WMS FDE is not completed? If CINS are not assigned?

Answer:

- There are no alerts. The WMS APP REG button will remain enabled until used. Once APP REG has been completed, the button label will change to the WMS SYNCH button. If the demographic data between WMS and CONNECTIONS is in synch, the synch button will be disabled. If the demographic data between CONNECTIONS and WMS is out of synch the button will be enabled. There are no on line reminders or alerts to complete WMS processing. However, if a voluntary agency worker adds an individual, an alert will be sent to the Case Manager to synchronize the data with WMS.
- The WMS Discrepancy Report contains cases that are out of synch.

Question:

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Are there any controls (i.e. reconciliation reports) planned to help keep data in synch between CONNECTIONS and WMS/CCRS?

Answer:

- WMS demographic information will be kept in synch with CONNECTIONS demographic data via an on-line interface. When the data is out of synch, the WMS SYNCH button will be enabled. There is no synch between CONNECTIONS and CCRS.
- There is a Monthly WMS Discrepancy report that shows those cases where Application registration and/or Full Data Entry have not been completed, where the CONNECTIONS case is closed but the WMS case remains open, lists where discrepancies appear in person demographics and where Office/Unit/Worker assignments differ.

Question:

When people are deleted/added in the CONNECTIONS application, are they reflected in WMS?

Answer:

For individuals who are being deleted, the individual must be end-dated in CONNECTIONS, this sends a transaction to WMS and puts the case in A\SFED-M status and the individual's status in WMS is changed to DEL.

An individual may be added by any worker assigned to the stage. An individual is added to the WMS case by the Case Manager in the FSS Composition window when the WMS SYNCH button is pushed. FDE must be completed in WMS. When an individual is added to an existing WMS case via CONNECTIONS, the WMS case status will change to UM/CL (undercare maintenance/ clearance). The clearance report should be reviewed to determine if the individual who was added is known to WMS. It can also be an aid in eligibility determination. The clearance will also indicate which line number the individual will populate on the WMS case. A recertification (transaction type 06) will need to be performed. Initially, the data entry operator should only select screen WSUWK2 and update the information for the individual to be added to the case. Once this is complete, the data entry operator can complete case processing (WSUDIR and WSUPOS) to complete the recertification.

Question:

If Voluntary Workers change demographic information, does it automatically update WMS or does only the LDSS worker have the ability to do this?

Answer:

Any worker assigned to a stage may change demographic information and send the transaction to WMS by pushing Save, or in the case of LDSS, the WMS SYNCH pushbutton on the Stage Composition screen. Only the Case Manager may add or delete individuals in WMS.

Question:

When the FSS is closed, what happens to a pending or in process FASP? Does WMS close automatically? Are there associated messages/warnings?

Answer:

If a FASP is pending approval and the stage is submitted for closure, the approver will receive a warning that the FASP should be approved first. If the FASP is in process, the worker initiating the closing will receive a message asking if they want to complete the FASP. If they say no, they will receive a closing

question, which must be answered. The approver to whom the closing is submitted will receive a message that the FASP has not been completed. The approver may choose to reject the closing and have the worker finish the FASP or proceed with the closing. Any FASP, which was in any status other than approved, when the stage is closed, will be dropped to template status.
WMS does not close automatically and should be closed once the CONNECTIONS case is closed.

Question:

If the CONNECTIONS case closes but we are providing Title XX/Low Income Day Care to the family, what do we do with the WMS case?

Answer:

If Low Income Day Care or Adult Services continue to be provided, the WMS case should be closed and then reopened with the desired services added.

Question:

I changed the date of birth on one of the children in my CONNECTIONS case and received a message that the individual was involved in a Non-Services Case. The change was reflected in CONNECTIONS. How do I change WMS?

Answer:

It is the responsibility of the Case Manager to reconcile differences between WMS and CONNECTIONS. The WMS Discrepancy Report will identify the cases that are out of synch. The Case Manager's job will be to contact the Non-Services worker to discuss the differences and resolve the issue.

Question:

I am confused by some of the messages I receive back from WMS.

Answer:

Workers who did their work exclusively in either WMS or CONNECTIONS will have to learn to use both systems. Messages and warnings are passed back and forth via the interface, from WMS to CONNECTIONS. Users will need to become familiar with the errors and warnings.

Question:

My WMS printer is going crazy, does CONNECTIONS trigger reports to print on the WMS printer?

Answer:

Clearance reports for new cases and added family members along with services authorizations for changes will route through the WMS printers. There will be more authorizations printed since demographic changes may only be completed on one individual at a time. Each time an individuals changes are saved an authorization will be produced.

CONNECTIONS Questions and Answers

Section 2: EQUIPMENT / TECHNOLOGY

Question:

For larger agencies, how are you working with them for dual data entry systems, data sharing?

Answer:

CONNECTIONS is the system of record. Dual data entry is to be avoided wherever possible. OCFS-IT is working on solutions, such as the Operational Data Store, to enable local districts and agencies to extract their CONNECTIONS data on a regular and frequent basis to be used at their discretion.

Question:

Are we moving towards a web-based application?

Answer:

Not in the immediate future.

Question:

If you are working on a case and get called away and the system logs you off, what happens to the information you were working on?

Answer:

CONNECTIONS times out after 15 minutes of inactivity (no keystrokes). The Citrix session remains open for an additional 15 minutes. If you return to your desk within the 30 minutes and select GO from the blue Citrix window, you will be reconnected to the same session. You may then Save any changes you have made on the open window. Generally, CONNECTIONS will not save any changes if you fail to return to your PC within the 30-minute time frame.

The one exception is Narratives. CONNECTIONS has an Auto Save feature where the narrative is saved every 3 minutes. Should a user enter Narrative data but fail to save it, and then walk away from their PC for more than 30 minutes, a copy of the changes should be saved to their Local Save folder on their T (Citrix Network) drive. The user will be prompted to open this more recent document the next time they try to access that narrative.

Question:

From the point where you logon, is there a maximum time that you can stay online?

Answer:

No, there are no time limits, provided the system is in continual use. The workstation times out if left idle as described above.

Question:

When multiple users are accessing a case simultaneously, what is the refresh time? When can you see the others work?

Answer:

Once a given piece of work is **saved**, it is placed in the database and available for view/modify access by users who have access to that information.

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Question:

Will there be a mechanism to attach digital documents to the case record to make it complete (i.e. scanning) such as medical records, letters, and digital photos?

Answer:

Scanning, screen shots, pictures and/or copying of whole documents into CONNECTIONS is **not** available with Build 18. Placing any of these items in a narrative field in CONNECTIONS will cause the document to be unavailable for viewing or printing and may cause your system to lockup.

Question:

Is there any capacity for on-line, informal communication within the electronic case record? During on-line case review a supervisor often has a question or needs clarification on something in record. Similarly a Case Manager may have a question of a Case Planner regarding something in the electronic case record. Is there capacity to write an on-line informal note and answer on-line within the electronic record before formally approving or rejecting a case? Of course, this is not meant as substitute for direct communication, case review meeting, etc. but this capacity will be important if the goal is to facilitate efficiency and eliminate paper.

Answer:

There is no capacity for instant messaging within CONNECTIONS. Password protected e-mail could be utilized for such informal communication. Supervisors formally rejecting a FASP, etc. can attach an explanatory note to the rejection. CONNECTIONS To-Dos may also be utilized for formal communications and requests.

*For instructions on how to password protect an e-mail see the document <u>Guidelines for Using Electronic Communication for Sharing Case Specific Information</u> on the Security page of the CONNECTIONS intranet.

**The Administrative Directive 05-OCFS-ADM-02 dated April 19, 2005, addresses issues of confidentiality, including the use of e-mail.

CONNECTIONS Questions and Answers

Section 3: FAMILY SERVICES INTAKE

Question:

I am a supervisor and a staff member is out on leave. Can I work on this staff person's cases?

Answer:

If the supervisor accesses the assigned workload window for a worker and selects the FSI stage, the supervisor takes on the role of that worker in that stage. FSI's may only have one worker assigned at a time. In this case the supervisor can modify data to the extent the FSI rules allow modifications to be made in this stage.

If the supervisor accesses the assigned workload window for a worker and selects the FSS stage, the supervisor takes on the role of that worker in that stage. When the role of the staff person is either Case Planner or Case Manager, the supervisor will no longer be able to approve the FASP since they are the unit approver and cannot approve their own work. In this case another supervisor must be selected to approve the FASP.

Question:

What are the rules for linking stages? How is this different from Merging stages?

Answer:

Linking is an immediate transaction, as opposed to merge, which requires a batch (overnight transaction). A Family Services Intake (FSI) may be linked to an open or closed case where the two cases share an individual who is 18 years of age or older. You cannot link to an open or closed FSI that was never progressed to a Family Services Stage (FSS). Linking is not allowed to a CPS Intake (INT) stage that was never progressed to an Investigation (INV) stage. Linking is an easy method to bring the new stage under the case umbrella of the pre-existing case. Merging combines two separate cases into one case. This can happen in the INV stage when a worker determines that two reports with separate case numbers are actually the same family and situation (one may have been reported with a subject name, the other without a name). The worker can merge the two reports/cases into one single case number.

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Question:

Is the worker who starts the FSI saved when the FSI is re-assigned?

Answer:

Yes, there is a historical listing of all workers who were assigned to the Family Services Intake. Reassigning the intake creates an assignment event, which is visible on the event list.

Question:

How will the LDSS be notified that they have an FSI?

Answer:

Each local district will set up the FSI acceptance unit. When the FSI is submitted for acceptance, the system will send an alert to the assigned LDSS worker in the acceptance unit.

Question:

Can a Local District initiate the FSI and then send it to a Voluntary Agency for completion?

Answer:

No, the system will not allow the LDSS to reassign an FSI to a VA. Once the FSI is opened, it can only be reassigned to a worker within the same district or agency. The LDSS should either refer the client to the VA and have the VA initiate the FSI or, contact the VA to discuss the referral, then complete the FSI, progress it to the FSS and assign it to the VA if they have agreed to provide services.

Question:

Can the LDSS worker assign a case to a worker in another LDSS?

Answer:

Yes, the role of Case Worker can be assigned to a worker in another district. See the Revised Umbrella Case Concept document on the Implementation page of the CONNECTIONS intranet on the Current Tools page under the heading Other Build 18 Implementation Tools.

Question:

Does the Intake Process replace the 2921 (Common Application)?

Answer:

No. Completion of the Common Application is still part of the Intake process. However, a Face Sheet can be printed from CONNECTIONS for attachment to the 2921.

Question:

Why do we still need a 2921?

Answer:

There is a federal requirement for a signed application that supports due process for a person who wishes to apply for services.

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Question:

What will happen if the family (applicant) decides they do not want services after they have already signed the service application (2921)?

Answer:

If the VA has entered the signed service application date into the FSI, the VA must submit the FSI to the Local District for approval/rejection. The VA should record the applicant's decision to withdraw the request for services and the reason(s) for this in the FSI narrative and request that the FSI be rejected. If the service application is withdrawn before it was signed, the VA can simply close the FSI stage.

Question:

What happens when there are 2 of the same person with different PIDs in the system? Can they be related?

Answer:

Yes, the worker should merge them. See the document titled Data Maintenance for Family Services Stage on the Step-By-Step/Job Aids/Tips page on the Step-By-Step page under the heading *For all Workers* on the CONNECTIONS intranet.

Question:

Will people have unique identification numbers?

Answer:

Yes.

Question:

Is the intake stage open immediately once everything is in the computer?

Answer:

The FSI is opened with the first Save of data in the Intake.

Question:

If information is entered into the FSI stage and the FSS is not opened, is the information that was entered in the FSI maintained in the system? How does it appear in a search? Is there any difference if an application for services has been signed?

Answer:

The FSI will appear in a search upon opening of the Intake stage. If an FSS is not opened, Intake data will be purged after 60 days of inactivity and the FSI will no longer appear in the search. It does not matter whether or not an application was taken.

Question:

When is it necessary to start the clock ticking for persons who are requesting services? When does documentation begin in order to support the decisions necessary for due process?

Answer:

If a contract exists between the district and the Preventive or Foster Care agency indicating that the agency is responsible for intake services, notification and offering a services application, documentation should begin upon the request for services by a consumer. This serves as verification of such events as the date of request, the offer for a consumer to sign an application, the consumer's decision to accept or deny the application, and the agency's decision to deny the services. This documentation serves as proof that activity is initiated prior to the signed application.

Question:

If the FSI is initiated from the tool bar, and then the worker does a search and discovers there is an open Investigation and links the FSI to the Investigation Stage, does a BCFI need to be completed?

Answer:

If the FSI is opened outside of the Investigation (from the toolbar), the BCFI must be completed. The Intake does not get linked until the stage is progressed and the system will not allow you to progress if the BCFI is not completed.

Question:

Who initiates the Intake, LDSS or the Voluntary agency?

Answer:

This is a local business practice and is determined by the LDSS and Voluntary Agency. Refer to your local business practices or contact your supervisor.

Question:

Should a worker do a search before doing intake?

Answer:

Yes

Question:

Can you relate people whose information is different?

Answer:

Yes.

Question:

On the FSI, can additional information be added to the narrative screen after it has been closed?

Answer:

No. A worker with a role in the stage can add narrative at any time until the intake is closed. Once the worker selects the Close pushbutton on the FSI stage, the narrative is not modifiable and information can no longer be added.

Question:

Will voluntary agencies be able to complete a person search if they are entering the FSI?

Answer:

Yes, workers have the ability to perform various case maintenance activities within the FSI. These include a person search, relating and unrelating persons to the case composition and linking the FSI to an existing CONNECTIONS case.

Question:

What role does a voluntary agency have in a Family Services Intake (FSI)?

Answer:

Voluntary Agencies can initiate the FSI when necessary. Voluntary Agencies must submit the completed FSI to the local district for either acceptance (FSI stage progressed to an FSS) or denial (FSI closed).

Question:

Would you use the FSI to open non-CPS cases for services?

Answer:

Yes. All Family Services cases are initiated through the FSI stage. For CPS cases, demographic data migrates into the FSI stage when opened from the INV stage. For non-CPS cases, the intake worker must complete all demographic data and FSI information in the FSI stage.

Question:

Will the Intake screen for CPS mirror the City's Template or will it be different? Will the counties have input in its creation?

Answer:

All workers statewide will use the same Family Services Intake screens as the first step in opening an ongoing services case. Completion of selected Intake components such as, the Behavioral Concerns and Family Issues, Requested Services and/or Programmatic Eligibility, is not required for intakes originating from a CPS Investigation.

CONNECTIONS Questions and Answers

Section 4: FAMILY SERVICES STAGE

Question:

Why can't I launch a Plan Amendment?

Answer:

- There is no approved FASP in the system.
- You are within the launch window for your next FASP and may therefore complete the status change within the current FASP or
- There is an in-process FASP where the status change may be recorded.

Question:

Why doesn't my SPR show up on my FASP report?

Answer:

The system is drawing over the most recent activity from the SPR tab. If no information on invitees, or the SPR activity is entered there is no information to be passed to the FASP report.

Question:

Why isn't the Submit button enabled on the Check FASP Detail Component Status when there are no missing FASP sections listed?

Answer:

- All required FASP components are complete and a CID has been established.
- User is the Case Planner or Case Manager for the stage.
- The FASP due date is 30 days or less from today's date (The In Process FASP due date can be identified on the Service Plan Review tab of the FSS stage.)

Question:

Why are some of the FASP components showing as incomplete?

Answer:

The Case Planner should look at the Case Planner Summary checkbox on the tabs within the node to determine if the Case Planner Summary has been completed. If the checkbox is not checked, the CP must launch the CP Summary and save.

The Case Planner Summary appears on the following nodes and tabs:

- Family Update/Case Update tab
- Assessment Analysis/Family View/Child View tab
- Assessment Analysis/Behavioral Concerns and Contributing Factors tab
- Assessment Analysis/Strengths tab
- Assessment Analysis/Needed Improvements/Changes tab
- Service Plan/Family Involvement window

Question:

Who does a worker submit the FASP to for approval?

Answer:

The Build 18 FASP approval process is as follows:

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1. If no Case Planner is assigned the Case Manager assumes that role. The Case Manager sends approvals to the Case Manager's unit approver.
2. When the Case Planner (*whether from an LDSS or a VA*) submits the FASP or the stage closing for approval, CONNECTIONS will **AUTOMATICALLY** add the Case Planner's unit approver and the Case Manager to the Approval To Do. (See rule #3 for one exception.)
3. The Case Planner may add one or more additional approvers within their district or agency. If an approver is added, the additional approvers must sign off before the Case Manager may approve the FASP.
4. If the staff person who is assigned as the Case Planner is the unit approver of their unit, CONNECTIONS will automatically return the message to add an approver from their LDSS or VA. P*lease Note: An individual cannot submit work to him or herself. Nor can an individual add him or herself as an approver.*
5. If the unit approver of the Case Planner submitting the work is the individual who is also assigned as Case Manager for this piece of work, one Approval To Do will be generated. (In other words the same person will NOT get two approval to do's for the same piece of work.)
6. If the Case Manager adds an approver(s) to any work, that piece of work is not considered complete, until the additional approver(s) has completed the approval process.
7. When DRS is involved in the stage, the order of approval is as follows: Case Planner to Case Planner's unit approver to DRS Case Worker(s) and finally to the Case Manager.
8. Although the Approval To-Do goes to all approvers at the same time, the system edits against the approval sequence as to who can approve first, second, third. Case Managers can easily see who has approved and who has yet to approve on the approval status window. If the Case Manager navigates from an approval To-Do that has pending approvals, he or she is not allowed to approve but is notified that the DRS approver or the Case Planner's Supervisor (whichever the case) must approve first. If a pending approver rejects the approval, the Approval To-Do of the other approvers is marked Complete and the Approver status is marked Invalidated. [If the approver tries to navigate to this invalidated approval, the To-Do gets deleted.] Upon resubmission of the FASP for approval, all approvers get a new Approval To-Do and the Complete To-Do automatically comes off their To-Do Lists.

Question:

How does the supervisor of the Case Planner get to approve the FASP?

Answer:

The FASP will be submitted by the Case Planner to his or her unit approver and approved online within CONNECTIONS.

Question:

Once a FASP is submitted for approval and the approval is pending, is there anything you can do to get information into the FASP?

Answer:

After a FASP is submitted for approval, the Case Planner may modify the FASP. Once the change is saved the pending approval will be cancelled and the FASP must be resubmitted for approval. The Case Manager and Case Worker will have View Only access to the FASP.

Question:

Can a child's Case Worker submit a plan amendment?

Answer:

The system allows any worker to *launch* and complete a Plan Amendment (the same as any other FASP). Only the *Case Planner* may *submit* the Plan Amendment for approval. Workers should contact the Case Planner by phone or send a To-Do to submit the Plan Amendment for approval.

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Question:

Can you assign roles across county lines?

Answer:

The LDSS Case Manager or LDSS Case Planner may assign the Case Worker role to a worker in another LDSS. Refer to the Revised Cross County Case Concept document on the Implementation page of the CONNECTIONS intranet on the Current Tools page under the heading Other Build 18 Implementation Tools.

Question:

Will you see 8D children in the FSS?

Answer:

8D children will be listed in Stage Composition and included in the Relationship Matrix. If the minor mom requests services for her child, a separate services case should be opened in the minor moms name with the minor mom listed as the primary caretaker. The child would be tracked in the minor moms case.

Question:

Why is ethnicity information collected?

Answer:

Ethnicity is submitted to the federal government as one of the required AFCARS elements.

Question:

If you have a role in a case, what access do you have to CPS information?

Answer:

Workers with a role in a case will receive an alert when a new CPS report comes in on a Family. When the CPS investigation is determined (Indicated or Unfounded) another alert will be sent to the assigned worker(s). LDSS Workers with an assigned role in a case will have access to CPS to indicated and *under investigation* information. LDSS Workers *will not* have access to Unfounded investigation stages; however, they will have historical access to Indicated investigation stages. VA staff will not have on-line access to any CPS investigations, in-process, unfounded, or indicated; they should contact the CPS worker for this information. Only the reporter/source must be withheld. IAB report information is not accessible to either LDSS or VA staff. Once a worker's role in the case has ended, they will be unable to view or access any new stages/documentation related to the case.

Question:

What happens when a TPR is suspended? How does the Child Case Record revert back to its old case?

Answer:

There is *no* system reversion to the old record. The worker has several options.

If the goal is to return to parent, the worker can close the CCR and reenter the child in the CWS stage if it is still open. If the CWS stage has been closed, the worker must do a new FSI for the family and open a new CWS stage for services. If the goal is anything but reunification (for example, will file for a new TPR), the worker can leave the child in the CCR and work from there.

Question:

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How do you end a child's track? Is it a Plan Amendment?

Answer:

Program choices and PPGs can be added, modified, and end dated on the Tracked Children Detail window in CONNECTIONS. Relevant status changes are to be documented within the FASP or on a Plan Amendment if the FASP is not available for launch. If the child is no longer in the FSS, he or she should be end dated on the Stage Composition tab.

Question:

What if a CPS report is still under investigation and a family wants services? Who is responsible for opening a case for services without an Investigation Conclusion?

Answer:

The CPS worker can open a Family Services Stage prior to the Investigation Conclusion by creating an FSI and progressing to an FSS.

Question:

What are the rules for associating a worker to a specific child? What does association do?

Answer:

Associating a worker to a child allows that specific worker to complete information for that child. The areas requiring completion are the Child Scales in the Strengths, Needs and Risk scales and the Foster Care Issues questions when the child is in placement. This association blocks all other workers assigned a role in the case, with the exception of the Case Planner, from entering data in the areas noted for the specific child. (If a non-tracked child is not associated to any worker, all Case Workers and the Case Planner may complete Strengths, Needs and Risk scales for that child.) Associating a worker may be done at any time by any worker in the stage.

Question:

At what point in Build 18 is a CIN required? Can a FASP be completed if there is no CIN?

Answer:

The CIN is the link that allows CONNECTIONS to pull tracking and/or placement information into the Tracked Child Detail and/or Foster Care Issues tabs. A FASP may be completed without opening a WMS case.

Question:

Under what circumstances is the Non LDSS custody functionality used? What group of kids?

Answer:

Non-LDSS custody functionality is used to support circumstances where children have been placed with a relative or other resource person and there is ***NO*** transfer of care and custody to the local commissioner. This may include cases with or without court involvement. The Program Choice of Non LDSS Custody – Relative/Resource Placement, must be used in conjunction with either or both of the Program Choices, Protective and/or Preventive.

Question:

When is the Life skills section required/used?

Answer:

Life Skills is *required* for all children who are age 14 to 21 at the time the FASP is due and who are in placement. Use of this component is optional for children under age 14 or not in placement.

Question:

Are Foster Care Issues carried over…i.e. how are resolution of these issues shown?

Answer:

The answers recorded on one FASP in the foster care issues sections are **NOT** carried forward to the next FASP. Resolution of these issues should be documented in the FASP or discharge plan at the time of the child's discharge.

Question:

How does the Visiting Plan relate to contacts?

Answer:

The Visiting Plan is a description of the *planned* visitation. Contacts, within the progress notes dialog is a way to document that those planned visits took place. A Family/Child Visiting Grid will be created by the system based upon Progress Note entries with a note type of family or sibling visitation or attempted family or sibling visitation.

Question:

Will VA's be able to see on-line that CPS Notification Letters have been generated and sent out?

Answer:

No, VA staff will be unable to access any CPS information on a case.

Question:

If a new CPS report comes in, will a Voluntary Agency worker assigned to the case be able to see whom the new CPS investigator is?

Answer:

Yes

Question:

If you are working on a preventive case, will you be able to determine whether there is an active Foster Care or CPS case open?

Answer:

Yes.

Question:

If a Child Welfare Stage (CWS) exists on a case and a new CPS investigation arises, does CWS involvement end pending the outcome of the CPS Investigation?

Answer:

No, a case may have several different stages open concurrently. The Family Service Stage would remain open and a separate CPS Investigation Stage would be opened.

Question:

If the system tells you there is an active case, will the system tell you the other workers unit number and phone number?

Answer:

Yes, the workers name and agency are listed; the phone number may be present if it was entered on the Staff Detail window.

Question:

How will Mental Health Services be incorporated?

Answer:

Build 19 will contain a separate module on Health Services for foster children. Among other things, clinical appointments, diagnoses, and treatment recommendations will be entered and maintained for five separate domains, one of which is Mental Health. Build 18 has child scales related to this area in the assessment section of the FASP. The scales ask if there are any mental health concerns. No specific diagnoses are mentioned in the scale responses, but narrative may be recorded in conjunction with the scale response.

Question:

What cases qualify as Advocate Preventive Only (ADVPO) cases?

Answer:

The Advocates Preventive Only (ADVPO) stage type is used exclusively for **Preventive Only** Family Services Stages (FSS) in NYC. The ADVPO case type cannot have any child in placement, referred to placement or with an under investigation or indicated CPS report. With an ADVPO both the Case Manager **and** the voluntary agency providing preventive services are exempt from recording the FASP and Progress Notes on-line. ADVPO stages are documented outside of CONNECTIONS.

Question:

Are signatures still required on the Service Plan Review?

Answer:

Electronic approvals take the place of signatures on paper documents for those items done in the system. Printed documents that are given to clients should be signed by all parties as appropriate.

Question:

Will there be a new form to give to the family to let them know where their information is going to be maintained (i.e. in CONNECTIONS)?

Answer:

No.

Question:

CONNECTIONS Questions and Answers

Can a caretaker with an unknown address be listed in the FSS Stage Composition?

Answer:

Each individual listed in the FSS Stage Composition must have one primary address. If the address is truly unknown (i.e. the person is homeless, etc.), we suggest using the agency address of the worker.

Question:

Can additional caretakers, other than the specified Primary Caretaker (PC) and Secondary Caretaker (SC), be assessed in the FASP?

Answer:

Yes, all adults listed in the FSS Stage Composition Tab will appear in the columns on the Parent/Caretaker Strengths, Needs and Risks window. If a person has been designated as a Primary or Secondary Caretaker, completion of the scales is *required*. Scales *may* be completed for all other adults listed, but are not required.

Question:

Will workers still have to end date a child, within the Family Composition, if a Plan Amendment has already been completed?

Answer:

Yes, workers will still have to end date the child. The Plan Amendment does not automatically end date people, unless the entire case is closed as a result of the Plan Amendment.

Question:

How and where does a worker access an in-process FASP or Plan Amendment that was dropped to template format and is now frozen? Can the frozen template be printed?

Answer:

A FASP and/or Plan Amendment dropped to template will be visible on the FASP tree and may be accessed by highlighting the template and clicking on it. The Template FASP will be viewed in Print Preview and is modifiable for 60 days from the day the FASP is dropped to template. The template will be frozen and is no longer modifiable after 60 days. You may open the template in View only mode. The template may be printed at any time.

Question:

Will the PID replace the CIN #?

Answer:

No, a CIN will be associated with a PID when there is a linked WMS case.

Question:

Will all the information that everyone has put into the system be available to the Case Planner to do the FASP?

Answer:

Yes.

Question:

When can a worker start a FASP?

Answer:

The Initial FASP may be launched (started) at any time after the opening of the FSS. Comprehensive FASPs can be launched 30 days before the due date. Reassessment FASPs may be launched 60 days before the due date. The Plan Amendment may only be used for changes that must be recorded during the span of time between the most recent FASP and before the next coming due FASP may be launched. (For a summary of all FASP rules, see the document, FASP Rules, on the Current Tools page of the Implementation page under the heading Other Build 18 Implementation Tools.)

Question:

Can supervisors edit their workers' work (FASP/ Progress notes)?

Answer:

No. Supervisors can access their workers' caseload but they cannot edit the work. A supervisor can create a progress note or FASP entry in the case. This would be marked with the supervisor's ID.

Question:

Can others view work in draft?

Answer:

Yes, both draft progress notes and draft FASP entries are viewable by all workers in the stage.

Question:

If a supervisor rejects work within a FASP, can the worker submit it anyway?

Answer:

If the Case Planner's supervisor rejects the FASP, it cannot be submitted to the Case Manager until the Case Planner's supervisor approves it.

Individual Case Worker contributions to the FASP (such as completion of the Foster Care Issue component for a child) are entered directly into the FASP and may only be modified by the Case Worker or Case Planner. Supervisors need to review worker entries online and direct the worker to make requested changes. If desired, districts and agencies should develop their own internal procedures for review/approval of Case Worker contributions to the FASP, prior to its submission by the Case Planner for approval.

Question:

If we do a search will other siblings in other agencies pop up?

Answer:

Sibling information can be seen by going into Case List.

CONNECTIONS Questions and Answers

Question:

How does the Supervisor sign off on Progress Notes?

Answer:

The system does not require supervisory approval of progress notes. Districts and agencies should follow their internal procedures for approval of progress notes. Supervisors have online access to view their workers' progress notes. Where supervisory sign off is desired, workers should be instructed to save their progress notes in draft form. Progress notes will freeze 15 calendar days from the day the notes are entered. Any supervisory review must be completed within this time period so workers can make corrections as directed.

Question:

How would supervisors alert the Caseworker that there is something they want them revise or change?

Answer:

Supervisors can send a To-Do to the worker telling them what needs to be revised. If a FASP sent for approval needs changing, they can reject it, noting the specifics in the rejection comments.

Question:

Does the system give you an alert to let you know a progress note will go final?

Answer:

No. Freezing is automatic after 15 calendar days. It should be noted that the 15-day clock begins on the ***entry date*** of the note not on the event date.

Question:

Does the 15 days also count weekends?

Answer:

Yes.

Question:

What if the system goes down for two days, would those days be counted as part of the 15 days?

Answer:

Yes.

Question:

Does the event list track when the FASP was submitted to the Case Manager for approval?

Answer:

Yes.

Question:

Case Planner role sometimes automatically transfers when the child that is assigned to the Case Planner's agency has been discharged. If another agency was servicing the family as a Case Worker, the Case Planner role is automatically transferred to that worker. Will the system support this?

Answer:

Reassignment would not be automatic within the system. The Case Manager will need to reassign the Case Planner role to the worker in the new agency.

Question:

If both workers on the case were on the same call, would they each be required to record a Progress Note on that call?

Answer:

This is an internal business practice refer to your local business process guidelines or ask your supervisor.

Question:

Will foster care workers receive an alert if there is a CPS report called in on a Foster Parent?

Answer:

Yes.

Question:

Can more than one person work in the case in edit mode (in FASP & progress notes) at the same time?

Answer:

Yes.

Question:

If you are the Case Planner and submit a FASP that was rejected, is that FASP frozen? How would it be modified?

Answer:

No, rejected FASPs are modifiable. They need to be resubmitted for approval after the requested revisions have been made.

Question:

According to regulations, the earliest that you can have a Service Plan Review Meeting is on the first of the month prior to the month in which the FASP is due. For example, if a FASP is due on 4/15/2004, then the earliest that the SPR meeting could be held would be 3/1/2004. Why is there no edit on the SPR Date Review Scheduled field in Build 18?

Answer:

There are no hard edits in the system for this regulatory requirement. The regulation is unchanged and is listed in on-line help.

Question:

If a child was in foster care 15 years ago and then came in for preventive services as an adult, will the new worker be able to see historical information for that person?

Answer:

Yes, as long as the person is appropriately related.

Question:

Will FSS cases be assigned directly to the worker or to the Agency? How will this work if the case originates in your agency?

Answer:

When a local district approves a Family Service Intake and progresses it to a Family Services Stage, they will assign it to a worker listed in the VA Assign Unit. The VA can populate that unit with one or multiple workers. For specific business procedures refer to your business process guidelines. When the Intake originates in the VA, the Intake worker submits the FSI to the local district for acceptance. Once the intake is accepted and progressed to an FSS it would be reassigned to the agency.

Question:

What makes up case composition? Is it the same as before in that it is who resides in the household?

Answer:

Case composition may include non-household family members who are being served; all known children's parent(s) must be included. Design work is underway regarding a means to record other significant relatives, especially grandparents as a part of Build 19. Workers should perform a Person Search when adding a person to the case and relate known persons.

Question:

What is the role of Case Manager when various agencies disagree about the FASP?

Answer:

The Case Manager is the final arbitrator; nothing about the system changes that.

Question:

What happens when an indication is overturned?

Answer:

When an indication is overturned through Administrative Review, the SCR updates the database to Unfounded. A person would need the Business Function View Unfounded to see the unfounded case.

Question:

Will the system allow you to change a CID date?

Answer:

The system will generate the Case Initiation Date (CID) based upon the earliest date related to four distinct events: the initial date of application for services, the date that a CPS report is indicated, the date of placement of a child into foster care; or the date of a court order requiring the delivery of services. The original information related to these dates can be modified in CCRS, thus generating a new CID, up until approval of the Initial FASP or, for converted cases, the launching of a Comprehensive or Reassessment FASP (in instances where there is no approved Initial FASP). The CID is frozen and can no longer be modified after a FASP has been approved.

CONNECTIONS Questions and Answers

Question:

If a case is closed and then reopened will there be a new CID?

Answer:

If all services to the family are terminated and the family services stage is closed a new family services stage will be initiated and a new CID will be generated.

Question:

When you get a case from the field office with one CID, and subsequently find another child in foster care, will they now have only one CID instead of two?

Answer:

There is only one CID per case. The CID is the earliest of the four dates listed above.

Question:

How does CONNECTIONS Support the Use of the YASI?

Answer:

The YASI (Youth Assessment and Screening Instrument) is currently an approved model of practice alternative to the UCR and agencies with UCR waivers may continue to use it as an appropriate Assessment and Service Plan to satisfy the regulatory requirements for the UCR. Therefore, for those with waivers, the Department of Probation will not have to do the FASP and can continue to use the YASI. However, because CONNECTIONS will not support Best Practice Alternative Models until Build 19, if the district does not complete the FASP, it will still *show up* as overdue on their OCI. If districts/agencies wish to complete the FASP so that the system reflects that the official Family Assessment and Service Plan was completed, they may use the information from the YASI to do so. The completion of the FASP in this instance is *above and beyond the regulatory requirement*.

With the implementation of Build 19, the unique *case type* Best Practice Alternative Models will be supported within the Intake module. It will require the completion of all Intake fields in the FSI to capture unique demographic, eligibility and data elements. In this case type the FASP will not be required in the Family Services Stage and does not show as overdue in the OCI reports.

As of now, all new child welfare cases must go through the Intake process. This sets up all of the eligibility, payment, etc. for Build 19, in addition to providing the demographic data that needs to be in the system. The WMS application process is completed within the CONNECTIONS application and CCRS is maintained separately. These cases must be opened in CONNECTIONS in order to maintain a WMS services case.

Question:

When a supervisor goes on vacation, how will progress notes get reviewed and approved before they freeze?

Answer:

The supervisor may assign a designee who will receive all alerts, to do’s, and approval tasks that have been assigned to the supervisor during the period of their absence.

Question:

Is there a time frame as to when progress notes are supposed to be entered?

Answer:

Regulations require that progress notes must be completed as contemporaneously (as soon after the event) as possible with the occurrence of the event or the receiving of information that is to be recorded.

Question:

For the Progress notes that are already in the system, are the workers printing them out and putting them in a hard copy folder?

Answer:

This is an individual agency determination related to business processes. The official record includes the information and progress notes maintained in CONNECTIONS in addition to any external documentation relevant to the case.

Question:

Will we be able to file the DSS 2221-A form, Report of Suspected Child Abuse or Maltreatment, online?

Answer:

No, the DSS 2221-A form will continue to be mailed to the local district CPS Unit, per normal procedures.

Question:

With regards to the worker role in a case, how would it work if you have a freed child who might have both a foster care and an adoption worker?

Answer:

These issues are addressed as part of the business process guidelines that both local districts and voluntary agencies completed.

Question:

If only one child of a sibling group is freed for adoption what happens?

Answer:

When a child is freed, and the Case Manager records this in the system by checking the completely freed for adoption box on the Tracked Children Detail window, a separate case, known as the Child Case Record (CCR), is established for that child.

Question:

Can you have a CCR for a sibling group that is freed at the same time?

Answer:

No, a separate CCR is created for each child. The system provides the ability to copy Progress Notes between records when the Case Manager is the same for the CCRs.

Question:

Can a childcare worker have a role?

Answer:

Yes, the childcare worker can be assigned the role of Case Worker.

Question:

Can you associate a child with more than one Case Worker?

Answer:

No, there is only one Case Worker associated to an individual child. However, workers may be associated to more than one child.

Question:

Is the last assessment available when you are completing the present assessment?

Answer:

Yes, prior completed FASPs are accessible in view mode from the FASP tree.

Question:

If the Case Planner leaves out a crucial part of the Case Workers report that was submitted for the FASP, is there any record of the workers entry?

Answer:

Workers' draft entries remain on the system. The Draft FASP can be printed until the FASP is approved. A copy of the Case Workers entry in the FASP may be cut and pasted to a progress note by the worker if desired.

Question:

Do progress notes have to be recorded before filling out the visitation grid?

Answer:

Yes. The visitation grid is system-generated from data in Progress Notes. The worker cannot enter data directly into the grid. The Progress Notes must be labeled as one of the following types: Family/PDR Visitation, Attempted Family/PDR Visitation, Sibling Visitation, Attempted Sibling Visitation, and Other Visitation in order for the information to come forward into the grid.

Question:

Does the Visiting Grid continue to update as you write progress notes after a FASP is launched?

Answer:

Yes, the Visiting Grid is updated from Progress Notes as long as the FASP is in process. Every time the Family/Child Visitation Grid window in the in-process FASP is opened, it will display a list of visitation notes from the due date of the last FASP (or from opening of the FSS if in the Initial FASP) up to the current date. The visitation report is generated and frozen upon submission of the FASP for approval. Anything added to Progress Notes after the submission of the FASP will not be included.

Question:

Can you send the SPR notification letter electronically to people not in the CONNECTIONS system?

Answer:

No, the worker generates a hard copy that must be mailed.

Question:

How will progress notes be sorted when multiple staff are recording notes on one case. Is there a default to a particular role?

Answer:

Progress notes will sort by date and by who entered them in reverse chronological order. All notes are viewable by anyone with a role in the case. Summaries or supervisory notes are listed at the top.

Question:

How do you handle duplicate entries if you have two workers involved in the same event?

Answer:

Both people may enter a note on the same event. This is an internal business practice. Refer to your district/agencies business process guidelines or ask your supervisor.

Question:

Is there any way you can include e-mails into your narrative of Progress Notes?

Answer:

You may highlight the ***text*** you want to copy and select copy from the drop down list. You may copy and paste ***text*** only into your progress notes.

Question:

When a Case Manager rejects a FASP is there a place in the system to record the reason for the rejection?

Answer:

There is a narrative box on the approval window where comments are entered for the rejection.

Question:

Who assigns roles?

Answer:

Initially the Case Manager makes the assignments. If a worker needs to reassign their role to someone within their agency the worker or their supervisor may reassign the role.

Question:

Can you change Case Planner in the middle of a case?

Answer:

The Case Manager can reassign the role of Case Planner during an open case. The Case Planner may also reassign the role of Case Planner to someone in his or her own agency.

CONNECTIONS Questions and Answers

Question:

Is there any way for the non-CPS cases to get the same structural risk analysis as CPS cases?

Answer:

The Risk Assessment Profile (RAP) can be added to the FASP through the add-a-component functionality. The RAP would be given the designation Added in the FASP header record. It should be noted, however, that the RAP was developed and validated on cases where there has already been at least one substantiated incidence of maltreatment. The validity of the RAP for non-CPS cases has not been established.

Question:

If a supervisor does not approve a FASP, does this go into a category of a missed FASP?

Answer:

The Case Manager is the official approver of the FASP unless the Case Manager is also acting as the Case Planner. If the FASP is not approved before the next FASP is launched, the FASP will be dropped to Template. A Missed FASP refers to a FASP that was never launched, and can no longer be launched due to the launch of a subsequent FASP.

Question:

If the FASP goes into template form is it still accessible by other workers involved in the case and can everyone still see it?

Answer:

Yes. The template FASP can be modified for 60 days (after that point it will freeze). The information in the template will not carry forward to the next FASP. The template FASP is always viewable, even once frozen.

Question:

What will happen if you don't complete the visiting plan?

Answer:

The system will not let you submit the FASP for approval, if there is a child in placement, unless there is data entered on the Visiting Plan tab or if, due to TPR or aggravated circumstances, there is information entered on the No Visiting Plan tab. When making modifications to the visiting plan, the Active plan must be end dated before updating the Review Status, Plan Description, Primary Location, Frequency, Duration, and/or the Visiting Plan Status fields. Participants may be changed on the Active plan without end dating the plan.

Question:

Is the Case Planner the only one who can complete the Safety Assessment in the FASP?

Answer:

Only the Case Planner or CPS Monitor can complete the Safety Assessment.

Question:

Is the role of the CPS Monitor optional?

Answer:

The role of a CPS monitor is not optional if the case is opened for services as a result of an indicated abuse and maltreatment report. CPS, or the designated monitor, is responsible for monitoring the safety of the child, activities that reduce risk, and determining that appropriate services are being implemented and that the service plan is modified when progress has been insufficient. If other DSS staff are appropriately trained and designated to be the CPS monitors, they may assume that role. If the Case Manager/Case Planner is also the CPS monitor, the role of CPS monitor in CONNECTIONS does not have to be uniquely assigned.

Question:

What is the impact of CONNECTIONS system display of differing opinion/perspective between workers who are working with a family?

Answer:

Without a specific example, it is difficult to respond to this question. First, it should be noted that the record should reflect facts, not specific opinions or perspectives that do not have supportive information or evidence. If the worker is stating an opinion, then that should be clearly identified and information that supports that opinion should be included in the narrative statement. The effect of the system displaying differing information demonstrates the need for more communication among the participants working with the family. In many instances, particularly when service providers are working with only one or some of the children or adult(s) in the family, the differing views or information they may glean from the family member will reflect that family member's perspective. This should also be clearly identified. We currently see multiple records and progress notes that reflect differing information. With the implementation of one on-line family case record we will have the opportunity for better communication to provide more accurate and consistent information.

Question:

Can a Supervisor enter a progress notes?

Answer:

Yes, Create Progress Note rights are granted to the following:

- Any worker assigned a role in the stage,
- Any worker who has access to an assigned worker's workload,
- A person with the Business Function, ENTER PROG NOTES, that is in the assigned worker's unit,
- A person assigned a Progress Notes Task To-Do.

Question:

Does the system track the date and times of entries in Tabs other than Progress Notes?

Answer:

Yes, the system keeps a record of the time and author of important system information.

Question:

How does B18 affect out-of-state placements?

Answer:

At this time, there is no plan to equip out-of-State agencies with the CONNECTIONS application. Since case planning and documentation requirements for children in these placements are no different from children residing within the State, it will be necessary for local districts to gather the information to complete the assessment and service plans, progress notes (and, upon implementation of Build 19, legal, placement and eligibility information) and enter that information into CONNECTIONS. Local districts may wish to discuss with out-of-State providers a means of obtaining information for inclusion in the CONNECTIONS electronic case record.

Question:

Is there a system timeframe for approvals of FASPs by LDSS?

Answer:

The system does not enforce timeframes for FASP approvals. Case Planners should contact the Case Manager if a FASP remains pending for a prolonged period. It should be noted, however, that a FASP that has been pending approval for more than 7 days would be dropped into Template upon the launch of a subsequent Comprehensive or Reassessment FASP. This can only happen if the launch window for the new FASP is open so the approval of the pending FASP would be seriously overdue. (Attempting to launch a Plan Amendment will never drop a pending FASP into template; the worker will receive a message to contact the Case Planner).

Question:

How do you handle situations where a worker does not complete their components of the FASP?

Answer:

The Local District/VA should address situations in which a worker does not complete their work in a timely manner the same way they always did, through supervision, discussion and appropriate corrective action. In some instances, the Case Planner may need to personally complete the FASP and then address the situation. Since a FASP that is marked missed by CONNECTIONS can no longer be completed in the system, the potential exists for serious fiscal implications to be imposed on Local Districts and VA's, especially if IV-E money is involved. The state has yet to determine any specific fiscal implications and/or sanctions that may be imposed.

Question:

Please give an example of each role in the case?

Answer:

- Case Manager – Every FSS has a single Case Manager, who must be LDSS staff. The Case Manager provides oversight of the case and must approve the Family Assessment and Service Plan (FASP). When the Case Manager also acts as the Case Planner, the Case Manager's supervisor must approve the FASP.
- Case Planner – The Case Planner, who may be either LDSS or VA staff, is responsible for the coordination of work with the family. The Case Planner is also author of the FASP and is responsible for the entirety of its contents and the timeliness of its submission for approval. This means the Case Planner must coordinate the documentation of all work in the FASP, and either accept it as contributed by the worker(s) or revise it accordingly. There may be only one Case Planner in the FSS.
- CPS Worker/Monitor – The CPS Worker/Monitor *must* be LDSS staff and may complete the CPS Risk Assessment Profile (RAP) and the Safety Assessments. The system supports, but does not require,

review of the FASP by a CPS Worker/Monitor. The Case Planner needs to alert the CPS Worker/Monitor in circumstances where she/he needs to complete work in, or review, the FASP.

- Case Worker – Case Workers may be either LDSS or VA staff. These workers may be associated with a specific child(ren) in the FSS and can complete specific work within the FASP, such as the Child Scales and Foster Care Issues regarding the child(ren) to whom they are associated. There may be multiple Case Workers assigned to the FSS.

Question:

How will LDSS decide which voluntary agency will have case planning responsibility?

Answer:

LDSS and VA should discuss and negotiate how assigned the role of Case Planner and assume case planning responsibilities.

Question:

Will OCFS be providing districts with direction on assigning roles in CONNECTIONS?

Answer:

The role of Case Planner should be designated or assigned to the worker with primary responsibility for working with the family and the majority of the children in the family. General recommendations include the following**:** Districts should assign roles based on a need to know basis and use caution when assigning multiple Caseworkers, thereby allowing increased access to case information. Districts should consider the following question: "What information does the worker need in order to make good case decisions?" A Case Planner from a VA *cannot* assign a role to a different VA. Only the Case Manager can make cross agency assignment of roles.

Question:

Why do Progress Notes freeze after 15 days? Supervisors do not have enough time to review progress notes of workers before the freeze.

Answer:

Case progress notes are part of the *contemporaneous daily business record* and as such may be submitted into evidence.

Question:

What happens when a plan is overdue?

Answer:

In Build 18 the Open Caseload Inquiry (OCI) will indicate when a FASP is overdue. It continues to be important that all assessment and service plans are completed and included in the case record, even if they are not completed on time. The system can only support work on one FASP at a time and seriously overdue FASPs cannot impede work going forward. In order to allow work on coming due FASPs, the system, upon the launch of a new FASP, will drop an *in-process* FASP or Plan Amendment to Template. Once the FASP is in template, workers will have 60 days to complete work within the template, at which point the template will be frozen. Previously due FASPs *that were never launched* will be marked as Missed upon the launch of a new FASP and will not be able to be completed, even in template. The system will provide warnings to alert workers when FASP initiation will affect overdue or in-process work.

Question:

What is contained in the Life Skills Assessment?

Answer:

The Life Skills Assessment contains a set of competencies and basic life skills (Daily Living Skills, Housing and Community Resources, Money Management, Self Care, Social Development and Work and Study Skills) that are critical for an adolescent to master in order to thrive and transition into a healthy, productive and self-sufficient adult. Youth's competency, in these basic life skills, is assessed and evaluated periodically to determine progress achieved in these areas.

Question:

What is the role of a therapist or parent aide in formulating the FASP and do they have to enter progress notes?

Answer:

The role of the therapist or parent aide in case assessment and service planning has not changed. The following individuals may enter Progress Notes: anyone with a role in the case, anyone with access to the workload of a person with a role in the case and anyone with the business function enter progress notes. A parent aide who is a District or VA employee may be given this business function and enter progress notes, however an independent therapist would not. Therapist evaluations/reports would become part of external documentation.

Question:

Which children have to be tracked in Build 18?

Answer:

Any child receiving Child Welfare Services is a tracked child. Each tracked child would have a designated Program Choice (PC) and Permanency Planning Goal (PPG). If the PC is Protective, *all* children in the home will be tracked.

Question:

Can a Case Manager enter a plan if the Case Planner fails to do it?

Answer:

A Case Manager cannot complete the FASP if there is another worker assigned the role of Case Planner.

Question:

Can a Case Worker be assigned to the entire family rather than just one child?

Answer:

Yes. A Case Worker can be assigned at the stage level without having specific responsibility for a specific child. They can view everything in the stage, enter progress notes, create service plans in the FASP, and answer generic FASP questions (for example, Case Update), but they will not be able to complete any child scales or foster care issues sections for tracked children. If a child(ren) is not tracked, they could complete the Strengths, Needs and Risk scales or Life Skills Assessment for that child(ren).

CONNECTIONS Questions and Answers

Question:

If a voluntary agency works with different districts, is it possible that they will have different roles?

Answer:

Yes, they could be assigned as Case Planner for some or all cases from one district, and as Case Worker for cases from another district.

Question:

How do progress notes come to a supervisor for review?

Answer:

Supervisors have online access to their workers cases (and therefore, progress notes). Workers can also send the supervisor a To-Do to review notes or otherwise alert them that they are ready for review.

Question:

Can you read progress notes as a running narrative or do you have to open each one separately?

Answer:

Up to 200 progress notes can be sorted and read or printed in chronological order.

Question:

Can anyone with a role in a case edit progress notes?

Answer:

Anyone with a role in the case may enter a progress note. Everyone's progress notes will be viewable by all workers assigned to the stage, but each worker maintains (edits) his or her own notes. Only the worker who authored the note, or the (clerical) worker who entered it on behalf of the author, can modify a progress note.

Question:

Will CPS progress notes show up on an FSS stage progress note screen?

Answer:

No.

Question:

Voluntary agency records therapist notes rather than progress notes. Where will they record these?

Answer:

Clinical notes will continue to be recorded *outside* of the CONNECTIONS Case Management system.

Question:

Is there any information that once entered cannot be changed?

Answer:

Progress notes freeze (cannot be changed) when saved as final or after 15 calendar days from entry, whichever comes first. FASPs freeze upon approval.

Question:

Who can add an addendum to a Progress Note?

Answer:

The following individuals can add an addendum to a Progress Note in FSS.

- The progress note's author,
- Anyone that has access to the Author's workload,
- The progress note's Entered By person,
- When the progress note contains an Author identified as Other, a new addendum may be added by:
  - The Entered By person, or
  - The assigned worker, or
  - Anyone with access to the assigned worker's workload in the district or agency of the Entered By person.

Question:

If a child has a Case Worker but the family also has a Case Worker that works on the plan (FASP), how do both Case Workers complete their work on the plan?

Answer:

This depends upon their individual role in the case and whether they are associated to an individual child. All workers assigned a role in the Family Service Stage (FSS) will document their work within a single, shared FASP. Workers will enter their contribution to specified FASP components in draft format. The Case Planner will then compile the draft entries of all workers into a single narrative and modify as appropriate. In this instance, the Case Worker for the child would be associated to the child and would complete Child Scales and Foster Care Issue components. Both workers could create as many Outcome and Activity service blocks for the child and family as necessary.

Question:

Can there be a Case Worker that is not associated to a child?

Answer:

Yes, they will have access to case information and progress notes, but will not be able to complete selected components of the FASP for tracked children. They may, however, contribute to non-child specific components like Family Background and may create Outcome and Activity blocks.

Question:

Do the timeframes for the FASP stay the same?

Answer:

The timeline for submission of the Initial FASP is slightly altered for indicated and opened CPS cases. Where the CID is the date of indication of a CPS report, the FASP is due 7 days after approval of the Investigation Conclusion. Similarly, CPS related status changes must be recorded on Plan Amendments within 7 days of the status change. The due date for the first reassessment FASP (for all program types: placement, preventive, protective) has been changed to 210 days from the CID. Subsequent Reassessment FASPs are due every six (6) months thereafter.

Question:

CONNECTIONS Questions and Answers

Where would a worker view the historical PPG or changes?

Answer:

This is viewed by selecting the View All button on the Tracked Children Detail window on the FASP tab.

Question:

Can anyone modify a FASP component?

Answer:

The Case Planner can modify all FASP components. Workers can modify their own draft entries (Saved as Draft) up until the time the Case Planner invokes the Case Planner Summary functionality. Anyone with a role in the stage can modify a Service Plan Outcome and Activity block; a record of who last updated the block is retained in the O&A Index, until the FASP is approved and becomes frozen.

Question:

Can a FASP be modified after the family sees and signs it?

Answer:

Approved FASPs cannot be modified. Draft FASPs are able to be printed (they will be clearly marked as Draft) and could be modified. The family should sign the approved FASP but there is no reason they should not see and comment on a Draft one.

Question:

When does a FASP revert to a template?

Answer:

Incomplete or pending FASPS will be dropped into template upon the launch of a new FASP. As an example, if a foster care worker launched the Comprehensive FASP prior to the CPS workers completion of the Initial FASP, the Initial FASP will be dropped to template. The system will alert workers attempting to launch a FASP of the existence of the in-process FASP. The launch rules dictate that this will only happen to FASPs that are overdue.

Question:

On a Reassessment FASP, what parts are pre-filled?

Answer:

Presenting Needs and Concerns will be pre-filled and unmodifiable. Family Background and Service Plan Outcome and Activity Blocks will be pre-filled and modifiable. Placement information will be brought forward from CCRS (Agency, Placement Date, and Facility ID, Address, and Type) displayed on the Tracked Child Detail tab. The Removal Information tab added with the Permanency Build 18.7 will also pre-fill.

Question:

Risk rating is generated at the initial plan; when is it modified?

Answer:

The Risk Assessment Profile (RAP) must be completed in all FASPs for stages with a Program Choice of Protective. The Non-CPS Risk Assessment is only completed in the Initial FASP for stages without a Protective Program Choice.

Question:

How do we accommodate the signature of the 3rd party reviewer?

Answer:

A FASP output Signature Page is available. Although on-line approval in CONNECTIONS is acceptable as the electronic equivalent of required signatures, districts may want to use the output page, especially at Service Plan Review Meetings. Obtaining signatures of parent(s) and child(ren) is strongly encouraged.

Question:

What will this single case record look like, when there are multiple inputs from different workers?

Answer:

Progress Notes will always be identified by worker name and agency. The FASP output will present and read as a single coherent document. A cover page will list all workers in the stage by role, agency and associated children. The Case Planner will use the Case Planner Summary functionality to compile the input of multiple workers into a single narrative. FASP Service Plan Outcome and Activity blocks will be marked with the name of the worker that last modified the block.

Question:

How is a worker notified of a new CPS report?

Answer:

All persons with a role in the case would receive an alert. Also, the Case Planner would see the new INV stage on the Case Summary window.

Question:

How would a worker know that a Case Planner changed his/her input through the Case Planner Summary functionality?

Answer:

Workers have view access to Case Planner Summary. A checkbox on the window will indicate when the Summary functionality has been launched. Workers can then review the Case Planner Summary to determine if there have been significant changes.

Question:

Can Preventive Agencies that currently substitute the YASI for the UCR continue to use the YASI?

Answer:

YASI is currently an approved model of practice alternative to the UCR and agencies with UCR waivers may continue to use it as an appropriate Assessment and Service Plan to satisfy the regulatory requirements for the UCR. They do not have to do the FASP. However, because CONNECTIONS will not support Best Practice Alternative Models until Build 19, if the district does not complete the FASP, it will *show up* as overdue on their OCI. If districts/agencies wish to complete the FASP so that the system reflects that the official Family Assessment and Service Plan was completed, they may use the information from the YASI to do so, but this would be *above and beyond the regulatory requirement*. See also questions under PINS/JD.

Question:

Does FASP replace the UCR on Non-CPS cases?

Answer:

Yes, the FASP replaces the UCR in both CPS and Non-CPS cases, with the following exception. Agencies that have an existing OCFS waiver to the UCR (see above question) will have the option to use an OCFS approved alternative case assessment and planning model for non-CPS cases.

Question:

If a voluntary agency needs to have access to a case in a local district, who would be responsible for assigning that access?

Answer:

The Local District Case Manager assigns the Voluntary Agency worker a role in the stage, which provides them access to the case record. If the Case Planner is a staff member of the VA, then the Case Planner may assign the role of Case Worker to another staff within the same agency. A Case Planner in a VA, or his or her supervisor, may also reassign the Case Planner role to someone in the same agency.

Question:

Who will the Case Planner be? In the past the local districts assigned this to private agency personnel. Will this remain the same? What happens when several children are placed at different agencies?

Answer:

This can remain the same. As in today's world, the Case Manager must be LDSS staff. The Case Manager can assign the role of Case Planner to either LDSS or Voluntary Agency staff. There can only be one Case Planner in the Family Services Stage. The Case Planner is responsible for coordination of all work with a family and is also the author of the FASP. The Case Planner is responsible for the entirety of the contents of the FASP as well as the timeliness of its submission for approval. If children are placed in multiple agencies, the Case Manager will assign one worker as Case Planner and the other workers as Case Workers. There is no limit to the number of Case Workers that may be assigned.

Question:

Now that we will be recording Progress Notes in CONNECTIONS, what exactly must be included? Can any information be kept off-line?

Answer:

The content of Progress Notes remains the same. Progress notes should <u>not</u> include clinical notes, daily logs, or written material created by service providers who act in roles other than Case Worker, CPS Monitor, Case Planner and Case Manager. If the Case Planner is also the clinical therapist that treats the child or family, there is no expectation that comprehensive clinical or treatment notes will be entered as daily progress notes. For all cases, there is an expectation that documentation will reflect the child and family's specific progress or barriers to successful clinical treatment outcomes, accomplishment of specific tasks and treatment goals and progress in achieving permanency goals.

Question:

Do other states that utilize a CONNECTIONS type system, keep hard copies? We have multiple needs for hard copies (re: accreditations, court paperwork/TPR's, etc.). How do others deal with this?

Answer:

At this time, retention of hard copy documents (birth certificates, court orders, medical records, etc) is necessary. Some information in records, such as original photographs, certified or notarized documents, court orders, etc., will need to be retained even if scanning should become available at a future date. Build 19 will include specific functionality that will support the ability to record the existence and location of external documentation or hard copy documents. Districts and agencies should define a procedure for referencing this type of information until Build 19 implementation, such as noting the specific document, photographs, etc. and location of external documentation in progress notes. This information continues to remain part of the official record and should be maintained in secured file cabinets.

CONNECTIONS Questions and Answers

Section 5: CONFIDENTIALITY / SECURITY / ACCESS

Question:

Has the proposed Voluntary Agency access to CPS information changed? Will VA staff have access to the Investigation stage?

Answer:

VA access to the Investigation stage has been postponed. Although existing statute and regulations provide access to all information to persons or agencies responsible for the care of a child or for the provision of services essential to the planning, treatment and delivery of services, disclosure of such information may not include any information that identifies the reporter/source of a CPS report, absent express written consent of the reporter/source.

CONNECTIONS was specifically designed to protect the identification of the reporter/source by special security attribute or Business Function Profile (BFP) of View Reporter/Source. However, it has come to our attention that CPS staff may be including identifying information related to the reporter/source in their progress notes or other narrative fields throughout the CPS investigation stage. This affects cases that have been in CONNECTIONS since July 1997. OCFS has determined that to allow access to existing progress notes or narrative fields in CPS investigation stages in CONNECTIONS by Contracted Preventive or Voluntary Foster Care agencies would place all social services districts at risk of non-compliance with existing statute.

All persons with a role in the Family Services stage will have access to the current or historical Family Services stages in a case, but we must limit access to the Investigation stage until future legal or technological solutions to this issue can be implemented.

Effective with the implementation of the CONNECTIONS Build 18 the following will apply:

1. Contract Preventive Services and Voluntary Foster Care Agency staff will have <u>no access</u> to current and historical CPS investigation stages.
   - For all Family Services Stages that are initiated from a CPS investigation stage, the Safety Assessment completed at the time of the Investigation Conclusion and the Risk Assessment Profile completed prior to the determination will be brought forward into the Family Services Stage and incorporated into the Initial Family Assessment and Services Plan (FASP), to be available to all contract Voluntary Foster Care Agency and Preventive Services staff for review.
2. All CPS staff are instructed to enter any identifying information related to contacts with the reporter/source *in Investigation Stage <u>Progress Notes</u> only, using the <u>Other Participant</u> data field, with the value of <u>reporter/source</u>.*
   - Social Services district staff must not include any identifying information regarding the reporter/source, including the institution, organization, etc. with which the person is affiliated, in any narrative field in Safety Assessments, the Risk Assessment Profile, Investigative Findings or Investigative Actions.

   We are requiring this change to facilitate future technological development in the application that will support protection of the reporter/source of the CPS report in a consistent manner.
3. Any person with a role in the Family Services Stage will receive an alert when a new CPS report is made on the family and a subsequent alert when the determination is made, so that they may contact the CPS worker assigned to discuss the status of the investigation, any relevant safety

issues and the findings of the case. Information relevant to any previous indicated or current CPS investigation stages may be shared with any person who has a role in the case.

4. All social services district staff, including non-CPS staff, will have access to historical and existing CPS investigation stages, including progress notes and other narrative fields in the investigation stage in CONNECTIONS, if they have a role in the case.

OCFS will pursue available legal and/or technological solutions to address this issue so that we will be able to support access to all relevant case information for persons with a role in the case.

Question:

How is Build 18 access defined? Does it give you the ability to edit?

Answer:

There are two basic types of access: Maintain access, which allows a person to edit, and View access, which has no ability to edit. Anyone who has a role in a stage will have Maintain access to that stage. To create entries in a case (i.e. maintain), the user must access the stage through the workload. LDSS staff with a role in the stage will have View access to all other stages in the case. VA staff with a role will have view access to all stages except Investigation. To View information, the user accesses the stage through person or case search.

Question:

Can you mark a case View Sensitive?

Answer:

A case may be marked Sensitive in the FSS. Access to Sensitive Cases is restricted through the use of security. The View Sensitive security attribute will allow users to view sensitive information on a case. If the user does *not* have the View Sensitive security attribute and he/she attempts to enter the Case Summary window, sensitive stages will not be displayed on the Case Summary window. *However, if an LDSS worker has a role in the case or an implied role in the case (a person in-common), then they will not need the View Sensitive security to see the stages of the case.*

Question:

How do you handle information on unfounded CPS cases that is included in indicated cases?

Answer:

CPS Investigation stages continue to remain separate and distinct from the Family Services stage and from each other. Workers will not have access to Unfounded Investigation stages, unless they are CPS workers with a special business function profile (BFP) of View Unfounded, regardless of their assigned or implied role in the case. It is important to note that Unfounded Investigation information may become part of the documentation for a new Investigation stage. If information is copied from an Unfounded Investigation stage to an open or Indicated Investigation stage, *prior to the determination,* then all information is viewable to anyone with access to the open, or subsequently indicated, investigation. The Unfounded Investigation will be sealed and external documentation relevant to the CPS Investigation should be sealed or expunged.

CONNECTIONS Questions and Answers

Question:

Will voluntaries be able to see the CPS workers progress notes when a case is still under investigation? There is some concern that this information may not be expunged by the voluntaries if the case is unfounded.

Answer:

Voluntary Agencies will not have access to CPS investigations in Build 18.

Question:

What access will a worker have to information about the source of a CPS report?

Answer:

VA workers will <u>not</u> have access to CPS Intake or Investigation stages. It is important to note that any reference to the source of a report, in FSS Progress Notes or the FSI narrative, should *not* contain identifying information. Workers can put identifying information in the Investigation Progress Notes only, using the Other Participant data field and a value of reporter/source.

Question:

With multiple worker access to the case record, how do you safeguard client confidentiality?

Answer:

The security within the system has been developed to support all current legal requirements and standards for confidentiality of information while allowing access to all essential persons who have a role in the delivery of services to the children and family. A person must have an assigned role in a case, or be a person who has been authorized access to the assigned worker's workload (for example, the Case Planner's supervisor), in order to access the information in the case.

Unique business function profiles (BFP) have been developed to allow, or limit, access to view or input case information according to a person's role, or according to specific statutory or regulatory prohibitions for access to information. We will also be reinforcing in all levels of training, policy manuals, guidelines and regulatory standards, the requirements for safeguarding confidentiality of client information.

Question:

How do users who do not have a role in the case access a case?

Answer:

Access rights are granted or assigned in several different ways. This allows districts and agencies to customize security access to the needs and business practices of their own organization. The district /agency Security Coordinator sets up the specific access rights for persons without a role in the stage through employing one or more of the following:

- Unit Hierarchy
- Organizational Hierarchy
- Assigned Business Function
- Assigned Job Type
- Assigned Unit Specialization
- Agency Access Options Matrix

These options are described briefly below. The Build 17 Job Aid and Security Step-by-Step Guide on the CONNECTIONS intranet give more detailed information.

Question:

How does Unit Hierarchy work?

Answer:

Unit Hierarchy access is dependent upon meeting three conditions:

- Being in the same unit as the worker with a role in the case, and
- Having the role of Unit Approver or a role above Unit Approver, and
- Having the UNIT SUMMARY ACCESS Business Function.

Anyone who has Unit Hierarchy access will have Maintain access to the Stage. Thus, a supervisor has the same maintain rights as their workers, providing they go through the worker's caseload.

Question:

How does Organizational Hierarchy work?

Answer:

A unit's position within the organizational hierarchy may be used to grant implicit security rights to individuals at higher management levels. A district/agency may choose to grant case access to all Family Service Intakes and Family Service Stages in subordinate units.

Question:

How do Business Functions work? Can a person be given View access to all cases in a district or agency?

Answer:

Security Coordinators can grant access through the assignment of specific Business Functions. A staff person who has the Business Function ACCESS ALL (in district or agency) will have View access to all cases in that district or agency, whether CPS, FAD or Family Services, subject to specific restrictions such as View Sensitive.

Question:

How is Job Type used to grant access?

Answer:

There is a new concept of Job Type that gives a district / agency additional control of access to the new FSI and FSS stages, if they choose. Security Coordinators can opt to assign a Job Type to each staff which will allow access to all FSI's and FSS's for which there is a staff person assigned with the same Job Type. For example, a person who is assigned the Foster Care Caseworker Job Type will be able to view all Family Service Intakes and

Family Service Stages that have a staff person with the Job Type of Foster Care Caseworker assigned to the stage. This additional access does not apply to FAD or CPS.

Question:

How is Unit Specialization used to grant access?

Answer:

Build 17 security changes the use of Unit Specialization. This works much like Job Type described above. A district can allow all Unit Approvers with a Unit Specialization (such as Foster Care) to access all FSI's and FSS's assigned to staff in a unit with the same Unit Specialization. [Note: Another available option is to give Unit Approvers access to every FSI and FSS stage in the district or agency, regardless of unit specialization].

Question:

How is the Agency Access Options Matrix used to grant access?

Answer:

The Agency Access Window allows Security Coordinators the option of a blanket specification of type of access (maintain, view or none) by three staff groupings (Case Assignable Staff, Unit Approvers, and Direct Supervisory Line). This optional assignment provides access to FSIs and FSSs only; it does not apply to FAD or CPS.

- ***Case Assignable Staff may be assigned Maintain <u>or</u> View <u>or</u> No Access to:***
  - All cases in district/agency
  - All cases in a unit
  - All cases with a worker with the same Job Type.
  - [For example, case assignable staff could be assigned Maintain access for all cases in the worker's unit, View access to all cases of workers with the same Job Type, and No access to all other cases in the district/agency.]
- ***Unit Approvers may be assigned Maintain <u>or</u> View <u>or</u> No Access to:***
  - All cases in district/agency
  - All cases within the same Unit Specialization
- ***Staff in a Direct Supervisory Line may be assigned Maintain <u>or</u> View <u>or</u> No Access to:***
  - All cases of staff in subordinate units.
  - [If desired, this access can be granted to only professional staff in the higher units in the direct supervisory line. Clerical staff can be excluded from access.]

Question:

If a worker goes out on leave is it going to be fairly easy for a supervisor or manager to have access to their caseload?

Answer:

If a supervisor or manager is in the same unit, he or she can access worker caseload through Unit Hierarchy access as defined above. A supervisor or manager can also be given access through one of the other choices delineated above.

Question:

Do you have access to the other kids information as long as you have a role in the FSS?

Answer:

All workers with a role in the FSS have View access to child information. A worker who is Associated with a child has Maintain access to that child's data and View access to other information in the FSS.

CONNECTIONS Questions and Answers

Question:

What if the supervisor goes on vacation, how will work get reviewed and approved?

Answer:

The supervisor may assign a designee in the system, which gives them the supervisor's business functions. However, making someone a designee does not cause him to receive all Alerts, To-Do's, and Approval tasks that have been assigned to the supervisor. The designee can be assigned to the supervisor's unit and get access to the supervisor's workload through Unit Hierarchy access or can get access to the supervisor's workload through one of the options described above.
For optional work review that is not required by CONNECTIONS (such as agency desired review of progress notes), staff should send a To-Do to review work directly to the designee.

Approval To Do's for the FASP are initiated by the Case Planner and sent to the Case Planner's unit approver and the LDSS Case Manager. [If the Case Manager is the only worker assigned and also functioning as the Case Planner, the approval To Do's go to the Case Manager's unit approver]. These workloads will need to be covered when staff are on vacation or away for extended periods of time. Access through Unit Hierarchy or through one of the other methods described above is critical to keeping the work moving forward.

Question:

What happens if the worker is on vacation? Are there alerts to the rest of the agency to let them know of coming and due work?

Answer:

Two management reports, the FASP Coming-Due / Overdue Report and the SPR Coming-Due / Overdue Report, will be available through the Data Warehouse to facilitate supervisory coverage**.** Each worker in CONNECTIONS also has a Family Services Open Caseload Inquiry Report (FSOCI), available on-line in real time, which lists coming due and overdue work. If a worker will be off for an extended period, his/her Supervisor should access that report by going through Unit Hierarchy access to the workers workload and checking the FSOCI.

Question:

Can supervisors edit their workers' work (FASP/ Progress notes)?

Answer:

There is **NO** edit capability on a progress note, for anyone but the author or the entered by person (who can only edit until the note freezes). Supervisors can create their own note or do an amendment to a worker's note, but they cannot edit the worker's note. Anyone with maintain access to the Case Planner's workload has maintain access to the FASP though the assigned Case Planner's workload. Any updates made via that path will reflect the name and ID of the person who made them. Case Manager's have no update rights to the FASP if he or she is not also assigned as the Case Planner. Therefore, the Case Manager's Supervisor, under this circumstance, also has no update rights to the FASP.

Question:

Will Child Care staff in Voluntary Agencies have access to the case record to read?

Answer:

It depends on how the agency sets up security. Any worker with an assigned role in the stage, LDSS or VA, has update and view rights to the case record, with the exception of unfounded reports. A childcare worker would need to be assigned the role of Case Worker if he or she needed access to view the record. He/she could not enter child specific data unless they were the worker associated to the child.

Question:

How will Quality Assurance staff get access to CONNECTIONS?

Answer:

They can be given access through the Business Function ACCESS ALL, or can be put in a unit that is, in the organizational hierarchy, above the units that have the cases that they need to access. This is explained further in the Build 17 Job Aid.

Question:

If you have a household with multiple families in it in two different cases, will you have access to both cases? If you have a case with mom and a 17 year old who has a baby and the daughter and baby are in another case, would you have access to the information in both cases?

Answer:

Yes, this is referred to as an implied role. If there is a person in common in a stage or case where a worker has a role, and another stage or case, the worker will be able to view the other stage or case, with the exception noted earlier – VA staff cannot access an Investigation Stage.

Question:

Is there anything in the system that can restrict access to someone?

Answer:

Voluntary Agency staff will not have access to In-Process, Unfounded, Indicated or IAB Investigations.
Access to information about children freed for adoption is restricted.
Marking a case sensitive restricts access to those with the business function View Sensitive.

Question:

What measures will be needed to ensure organizations comply with HIPAA? Since personal health information will be shared not only with the county but other agencies, how will we ensure all of our compliance with HIPAA?

Answer:

It is essential to understand that HIPAA does not apply to everyone who receives or maintains protected health information (PHI). In fact, Congress only authorized the U.S. Department of Health and Human Services (DHHS) to promulgate regulations for three specific types of entities that transmit or maintain PHI, namely those health care providers who conduct certain financial and administrative transactions electronically (such as claims for payment), health plans, and health care clearinghouses. These entities governed by the HIPAA regulations are collectively referred to as covered entities. Several years ago OCFS conducted an examination of its business practices and, finding that it did not meet the above definition, declared itself not to be a covered entity. Therefore OCFS need not comply with the federal HIPAA regulations.

Under HIPAA, DHHS explicitly permits covered entities to disclose protected health information as may be required by law (see 45 CFR 164.512(a)). As New York State is required by applicable state (See Social Services Law §373-a) and federal statutes and regulations (45 CFR 1355, Appendix D (AFCARS)) to collect and report certain information regarding children receiving Title IV-E, including Title XIX (Medicaid) assistance information, covered entities are permitted under HIPAA to make such disclosures to the State. Disclosure to the State as required by law does not jeopardize a covered entity's ability to comply with HIPAA. Information that is required and which may be disclosed includes, but is not limited to those conditions, which require special medical care, such as chronic illnesses. Included are children diagnosed as HIV positive or with AIDS. Additional conditions that must be reported are mental retardation, visually or hearing impaired, physically disabled, emotionally disturbed.

Once this information is disclosed to the State, it is not subject to HIPAA. However, such information is confidential and protected by various federal and state laws, and as such, is restricted in CONNECTIONS, through the use of Business Function Profiles (BFPs) to those with a legitimate need to know / role in the case.

There is a unique Business Function Profile (BFP) that provides specific access through security that must be assigned by your agency to staff in order to view a child's health history. Only the Case Worker associated to the child, the Case Planner and the Case Manager and their respective supervisors may view the information. There is no access permitted through implied role and no access across agency as feasible under the new Build 17 security. There are also specific confidentiality statements that are included on each page of the data when it is printed out and warnings regarding confidentiality of the information when entering the module and the different tabs.

Question:

Will children/families be able to choose what information is shared with other providers? For example, if a family member does not want their progress notes to be shared with other providers working with other family members, will they be able to make that determination?

Answer:

No, unless it is specifically prohibited from being shared under the existing confidentiality, privacy and redisclosure regulations.

Question:

Will a family have the right to refuse having information regarding substance abuse or mental health issues (which may be captured in progress notes) shared with other contract agencies (third parties)?

Answer:

All confidentiality and re-disclosure statutes specifically related to Mental Health and Substance Abuse written material, assessments or other information are not changed. Information that is currently entered into progress notes may specifically identify problems, safety issues or needs of the family related to mental health or substance abuse issues. Information in progress notes may now be shared with appropriate service providers. This will continue as appropriate to provide the necessary safety interventions and rehabilitative services to the family.

CONNECTIONS Questions and Answers

Question:

Can you access info in a closed case?

Answer:

Yes. Workers who had an assigned role in a case, or who had authorized access to a case (for example, the Case Planner's supervisor), will be able to see historical stages associated with that case and will have access to information in closed cases subject to VA restrictions discussed above. Unique business function profiles (BFP) have been developed to allow, or limit, access according to specific statutory or regulatory prohibitions for access to information.

Question:

Who can see what parts of a FASP?

Answer:

All workers with an assigned or implied role in the stage, and persons in their supervisory hierarchy, can view all FASP components.

Question:

How will voluntary agencies use the information in the system? What if a voluntary agency has information that is confidential from other voluntary agencies?

Answer:

All confidentiality statutes apply equally to LDSS and the VA's with whom the LDSS contracts. All future training sessions should specifically emphasize increased staff responsibility to maintain confidentiality and adhere to existing confidentiality and re-disclosure mandates.

Question:

Is a release of information required if sharing information in electronic record with other agencies?

Answer:

Current agency policies on the release of information should continue. Build 18 will not require additional local policies relevant to the release of information.

Question:

How will families get access to information contained in the records of the voluntary agencies?

Answer:

Families will get access to VA case information via the protocols currently in place; the information, however, may be presented in a different format.

Question:

How will confidentiality issues regarding substance abuse, mental health issues and HIV be addressed in CONNECTIONS (especially in progress notes)? Will a family have the right to refuse having the above information (which may be captured in progress notes) shared with other contract agencies (third parties)?

Answer:

Progress notes may include clinical information such as summaries of child and family's progress in treatment and related to achievement or barriers to successful clinical intervention, tasks and goals and information necessary to support the safety of child(ren). Local policies on the release of information may also apply in these specified circumstances. Workers will need a specific security profile in order to access the health services tab to be supported in Build 19.

Question:

Will there be a model confidentiality form provided by the state?

Answer:

05-OCFS-ADM-02 Case Management Changes Associated with Build 18 addresses Confidentiality and Access to Information and Re-disclosure. You may find a copy of this Administrative Directive on the OCFS website under Policies – External.

Question:

Would a Case Planner/Case Worker have access to an IAB record via his or her implied role? If an IAB report comes in on a child in a VA, does the VA worker assigned to the case have access to the information in the IAB record?

Answer:

There will be no automatic notification of an IAB investigation to workers in a VA. There will be no system access to IAB reports provided to staff at VA. LDSS staff will be able to access the system record, if the child in question is under their jurisdiction.

Question:

How will CONNECTIONS meet HIPPA requirements?

Answer:

Per Legal, CONNECTIONS is *not required by law* to comply with the Health Insurance Portability and Accountability Act, commonly known as HIPAA. HIPAA does not apply to everyone who receives or maintains patient health information. As CONNECTIONS is not a health care provider, a health plan or a health care clearinghouse as defined in the 45 CFR 160.103, the state SACWIS system, while collecting and storing health and eligibility information, would not be considered a covered entity.

CONNECTIONS Questions and Answers

Section 6: REPORTS / OUTPUTS / PRINTING

Question:

Can the print button be disabled until a CPS case is indicated?

Answer:

The print button will not be disabled for in-process CPS cases. However, the ability to print under investigation CPS info is limited to individuals within an LDSS with the CPS profiles. So, for example, while a clerk may have the Enter Progress Notes business function and be able to enter notes on behalf of a CPS worker, that same clerk will NOT be able to print those notes, while the case is under investigation.

Question:

Will there be Spanish versions of the SPR letters?

Answer:

Yes

Question:

Can the SPR letters be printed on local letterhead?

Answer:

Yes

Question:

Does the system generated SPR letter incorporate ASFA language to notify people of the 15/22 months in care?

Answer:

Yes.

Question:

Can the SPR letter be customized?

Answer:

The text of the letter cannot be customized. Specific data fields (name/address of invitees, child demographics, scheduling and contact information) are entered into the SPR window and brought into the letter by the system.

Question:

Will a management report accessible through the Data Warehouse be available that will delineate Service Plan Reviews (SPR's) completed by District/Agency, Unit, and Date?

Answer:

Two SPR Management Reports will be available through the Data Warehouse. The SPR Coming-Due Report provides case-level details for those SPRs that have been missed or are coming due. The SPR Summary Report provides an aggregate number of completed SPRs; it does not provide a listing by case. Both reports can be specified by District /Agency, Site, or Unit, and depending on the type of report, by Report Date (Coming Due) or Report Period (Summary).

Question:

What is released if a printed copy of a case record is requested?

Answer:

The following data will be maintained and printable in CONNECTIONS, Build 18:

- Family Services Intake Report
- Family Services Intake Face Sheet
- All Family Assessment and Service Plans (FASPs) and Plan Amendments
- All Service Plan Review Reports
- All Progress Notes

Other documentation will be maintained outside of CONNECTIONS and may need to be copied, depending on the release request. This includes:

- Birth Certificates
- Court Orders
- Medical Information and Consents
- Record of school placement, education reports and evaluations
- Psychiatric/psychological reports
- Reports from other agencies
- Correspondence

Question:

Based on printing edits, can a worker print enough of the case to maintain a paper record?

Answer:

We strongly recommend that worker's do not maintain paper records. Although the ability to print case record components will be available, it should be employed judiciously for specific purposes, not as maintenance of a back-up paper record. For example, copies of the Family Assessment and Service Plan may be printed to share with the family or the case components listed in the above question can be printed separately where a copy of the case record is required for legal purposes. Case File Print functionality, the ability to print the complete official record via a single command, will not be available until Build 19.

Question:

If a voluntary agency receives a subpoena, can they print records?

Answer:

Anyone with View access to the case record can print it. This includes Voluntary Agencies.

Question:

Can records be printed for auditors?

Answer:

Yes

Question:

Can a FASP be printed after a case is closed?

Answer:

Yes

Question:

Can supervisors access and print a report that identifies which workers have reports (FASP) coming due?

Answer:

Yes, they may access an online report for each worker that lists coming due and overdue FASPs. Management reports by unit will not be available until Build 19.

Section 7: PINS / JD CASES

Question:

If the children are placed solely through OCFS, will the worker be doing UCRs?

Answer:

The voluntary agency will continue to provide direct care and perform the Case Planner role, including documentation of the assessment and service plan. This is done through the FASP (Family Assessment and Service Plan) that replaces the UCR in Build 18.

Question:

Will voluntary agencies do Intakes on PINS cases?

Answer:

This will depend upon their contract with the Local Department of Social Services.

Question:

If the child is a PINS or JD and the case begins with a POS Agency, how will the LDSS get the referral?

Answer:

Follow your districts business process guidelines.

Question:

Will PINS/JD cases have the ability to have their own case like that of a freed child?

Answer:

No, the child case record is only for freed children. The PINS/JD case would include all family members, but other children in the family are not required to be tracked or addressed in the case.

Question:

How do you handle cases where the children are in the custody of OCFS?

Answer:

Children placed in the custody of OCFS and in the care of voluntary agencies will be treated in the same manner, from the standpoint of establishing a case documenting work in CONNECTIONS, as children placed in the custody of local commissioners of social services. See the OCFS Custody Youth Placed in voluntary Agencies on the Desk / Job Aids page under the Other category.

Question:

How does CONNECTIONS support assessment completed for PINS types cases that currently use other documentation tools in lieu of UCR's?

Answer:

For all child welfare cases, including those currently being served by agencies that have an existing OCFS waiver to the UCR, the Local Department of Social Services (LDSS) retains the role of Case Manager. In Build 18, the LDSS will be required to complete an Intake and open a Family Services Stage. Requirements necessary for completion and approval of the Family Assessment and Service Plan

(FASP) must be completed in the CONNECTIONS system. If you do not complete the FASP in CONNECTIONS and submit it for approval, the system will identify this as a missed FASP and it will continue to be reflected as overdue on your Open Case Inquiry (OCI) report. The alternative assessment tool may continue to be used by the service provider, and meet the regulatory requirements for case planning, but it will not be recorded as a substitution for the completion of the FASP in CONNECTIONS. A new case type for Preventive Only cases that have OCFS approved alternative case assessment and planning models are anticipated in Build 19. We hope to support minimal LDSS data entry at the Intake stage for these cases in the future.

Question:

Our County contracts with two agencies, the County Youth Bureau and County Probation Department to provides PINS-type services to children and families which are opened to and paid for under mandated preventive services by DSS. OCFS has approved acceptance of the YASI in lieu of UCRs for these cases. How will CONNECTIONS Build 18 support this practice?

Answer:

See above response.

Question

How do Builds 16 and 18 relate to Voluntary Agencies working with JDs placed by Family Courts?

Answer:

Build 16 relates to Child Protective Services Investigations and, therefore, does not relate to the provision of ongoing services. If the family of the child who is in foster care, regardless of his or her status as a JD or PINS, is receiving services as a result of an indicated child protective services report, the Safety Assessment must be completed. If the only reason the services case is open is because of the child's entry into foster care as a result of his or her adjudication as a PINS or JD, the Safety Assessment is optional.

With the implementation of Build 18 assessment and service planning as well as service plan reviews and progress notes are completed within CONNECTIONS. All activities involved in establishing the case in CONNECTIONS, such as recording the Family Services Intake and conducting person/case clearances, must be performed in CONNECTIONS. An agency's role and responsibilities for the performance of these activities will depend on the terms of the agency LDSS agreement. All information respective to children in foster care, regardless of their legal status as a JD or PINS, will be entered into the CONNECTIONS system.

CONNECTIONS Questions and Answers

Section 8: IMPLEMENTATION / TRAINING / SUPPORT

Question:

What is the plan for training regarding staff turnover?

Answer:

Ongoing, operational training to support the use of the application to cover new hires and transfers from other program areas is currently available. Check the CONNECTIONS intranet sites Training page for upcoming trainings in your area.

Question:

How long will Implementation Coordinator Training be?

Answer:

The Implementation Coordinator training will be a one-day course. It will be offered on a regular basis continuing throughout the implementation of Build 19 and beyond.

Question:

Is there a work group that agencies can join?

Answer:

Yes, in most regions, there are Regional Implementation Support Teams (RIST). These teams examine common implementation problems and work to develop consistent regional solutions. Local Districts and agencies are encouraged to participate. Please contact your CONNECTIONS Regional staff representative for additional information.

Question:

Do the Security Coordinator and the person coordinating training require technical skills?

Answer:

Persons holding these positions should be comfortable with using a computer, but they do not require extensive technical skills. Both LDSS and VA Security Coordinators need to use CONNECTIONS to establish security. The coordinator of training for local districts should be familiar with the STARS system.

Question:

Does the state still need mobile lab sites?

Answer:

Yes we do, especially in the Lower Hudson Valley, NYC, and Long Island areas, but we would welcome agencies or districts that would volunteer to serve as a mobile lab site from all parts of the state. If you have a potential site or have questions, please contact Suzanne Wilson of the CONNECTIONS Training Team at 518-474-8899 or by email through Outlook.

Question:

How will we be notified about on going training and how do we sign up for it? To whom in our agency will you be sending all of the training materials?

Answer:

Program training will be provided through the Center for Human Development Services (CDHS). CONNECTIONS Training will be provided through the SUNY Training Strategies Group (TSG). All trainings are listed on STARS. Your staff development coordinator or training manager will register you through the STARS system. In addition, upcoming schedules will be posted on the OCFS/CONNECTIONS Intranet Site on the Training page.

Question:

How should we select the staff to be designated as Resource Users?

Answer:

Resource users are staff that will receive extra training and be expected to provide support to their colleagues in learning to use the new system. Some of the criteria for selecting these staff should include as many of these qualities as possible:

- Knowledge of the scope of the local agency or district's child welfare programs
- General skill and comfort level using computers and learning new applications
- Familiarity with Windows applications
- Willingness to assume the role of a helper for other staff and comfort in this role
- Familiarity with the current CONNECTIONS application would be helpful, but not essential

Question:

I have staff now that needs help in writing their FASPs. Where do I find training for the FASP?

Answer:

The Professional Development Program (PDP) at SUNY Albany is available to provide training and TA to districts and agencies so that they can use the FASP.

Question:

What other types of supports or training can we expect to support the program and practice changes?

Answer:

In addition to the training resources that are identified above, OCFS continues to support all new program and policy changes with written guidelines that are available on the OCFS website.

CONNECTIONS Questions and Answers

Section 9: GENERAL

Question:

How do I create a To Do with the case information in it?

Answer:

You may create a To Do with the case name and number by highlighting an existing To-Do on that case and selecting 'File' and 'New Using'. This will create a To Do with the case IDs and names.

Question:

Is there a cap on the number of cases that can be assigned to a worker?

Answer:

No

Question:

Is there a limit on the number of workers that can be assigned to a unit?

Answer:

Yes, 50.

Question:

Will you be able to export information from CONNECTIONS to an Excel spreadsheet?

Answer:

No, you cannot directly export data from the CONNECTIONS application into an Excel spreadsheet, however, data from the application will be available through the Data Warehouse which your agency will be able to customize to address your agency's unique data needs.

Question:

Can risk scale information be exported to data warehouse to produce aggregate data to identify reduced risks?

Answer:

Data Warehouse is working with research and policy staff to provide essential reports and aggregate data that will support this analysis.

Question:

Some agencies have other documentation requirements. Can information be imported from or exported to CONNECTIONS? Can you recommend any software vendors that could work on this?

Answer:

The OCFS Data Warehouse contains some CPS, CCRS and FAD data from weekly loads of CONNECTIONS and Legacy systems data. The data is refreshed on a weekly basis. Thus, every Monday the data reflects the state of the CONNECTIONS and CCRS systems as of the previous week. Using the Cognos Impromptu and Power Play tools, data extracts can be saved and used in spreadsheets, statistical packages, word processing and other stand-alone applications.

There is no capability or future plan to allow outside data to populate the CONNECTIONS application, whether directly or through the use of the Data Warehouse. The focus of the Data Warehouse is to provide data for strategic analytical purposes. The Data Warehouse is not the appropriate vehicle for establishing ongoing data transfers between two or more applications due to both the latency of the data and the business logic applied to the data during its preparation for analysis.

There is one effort that will soon be underway, the CONNECTIONS Operational Data Store (ODS) project, which will focus on providing some of the CONNECTIONS data for more tactical reporting use. It is envisioned that extracts will be pulled from the ODS and utilized in making some of the straightforward daily decisions and analyses. Users will be cautioned as to their reliance on the ODS for sourcing downstream applications as the purpose of the ODS is to support tactical decision making capabilities of the organization.

Question:

Is there any charge or billing back to a LDSS or Voluntary Agency for the expense of a help desk ticket?

Answer:

There is no charge, either direct or billed back to a program, for a help desk call or ticket.

Question:

Does the service application still have to go through WMS and the APP REG process?

Answer:

All application registrations take place in CONNECTIONS; the user is not able to initiate this process in WMS. The interface program creates the shell WMS case when the Family Services Intake is stage progressed to the Family Services Stage. Full data entry is still done in WMS directly.

Question:

Voluntary Agency supervisors will have to review both the system progress notes and the clinical notes; there will not be enough time to complete all the work.

Answer:

There are no mandates for supervisory review of notes, either clinical or progress. Supervisors can continue to review these as in the past as they deem appropriate. Supervisors will be able to sort and search by worker name and dates to expedite their review. The sort is also printable.

Question:

Will there be a link between CONNECTIONS and Income Maintenance information?

Answer:

There is no link to Income Maintenance information in Build 18.

Question:

Will there be differential rates for the different roles in CONNECTIONS?

Answer:

No, There are no planned changes to rates for different roles.

CONNECTIONS Questions and Answers

Question:

Will the language of the model contract be updated for CONNECTIONS?

Answer:

Yes, the model contract has been updated and is available in the 05-OCFS-ADM-02 dated April 19, 2005.

Question:

Build 18 & 19 changes will have a major impact on voluntary agencies in that it will duplicate data functions that they are already performing, either manually or automated. Has any consideration been given to the cost impact on voluntary agencies and the changes they will have to make?

Answer:

The CONNECTIONS system is a comprehensive data collection and case management system that supports existing data requirements of the federal government with which New York must comply or risk losing hundreds of millions of dollars in federal revenue. Without this federal revenue we would be unable to sustain the level of service that we currently provide our children and families. It is also essential for compliance with federal mandates that NYS have a single statewide system.

Although a voluntary agency may currently be collecting specific data unique to the families that their agency serves, current databases do not provide access to a comprehensive case record for the family, nor do they provide access to historical information regarding the family when they may have been served by other agencies, which CONNECTIONS will do. Most of the data currently collected should be available through the Data Warehouse Management reports as future components including legal activities; placement information, fiscal, service authorization and eligibility are implemented.

With the ability of voluntary agencies to access the Secure Socket Layer Virtual Private Network (SSL VPN) currently available, they will be able to continue to use their own computer network to access CONNECTIONS, as well as to support any unique data collection programs that have already been developed that do not duplicate the data collected in the CONNECTIONS system.

Question:

Does the research indicate whether Build 18 is likely to result in more or less face-to-face time between caseworkers and families?

Answer:

One of the reasons OCFS designed the new Consolidated Investigation process in Build 16 was to minimize the investigative system requirements so that CPS caseworkers would have more time to address the critical needs of families and complete comprehensive investigations. In addition, the Risk Assessment Profile is supported in Build 18 and will assist workers in better identifying families that are at high risk of repeated abuse and/or maltreatment so resources can be used more effectively and children and families at greatest risk are appropriately served. It is our anticipation that immediate access to historical and current case information, an assessment process that is based on an evidence-based decision-making model, and a more coordinated, comprehensive service plan that incorporates families' strengths will help us achieve more timely and successful outcomes for families. The data and information that will now be provided, both on an individual case and agency wide basis, should also assist both caseworkers and administrators to better manage caseloads, analyze data and deploy resources more effectively.

Question:

Please summarize how the new policy and system will simplify the workload for caseworkers.

Answer:

Please see above.

Question:

Will WMS be replaced by CONNECTIONS?

Answer:

There is no plan to replace WMS with CONNECTIONS. However, child welfare services cases can no longer be initiated through WMS--they will be initiated through CONNECTIONS. Full Data Entry must be completed in WMS. Demographic information on case participants will be maintained through the interface between CONNECTIONS and WMS. Discrepancies in the information between the two systems will be identified and reported to the districts via the WMS Discrepancy Report. With the implementation of Build 19, the WMS entry requirements for child welfare services cases will cease with the exception of obtaining a CIN assignment (an automated process).