



CONNECTIONS

**Getting to Know the Transformed
Family Services Intake (FSI)
Stage in CONNECTIONS**

Build Job Aid

v1.0 (01/08/2015)



**Office of Children
and Family Services**



PROFESSIONAL DEVELOPMENT PROGRAM
ROCKEFELLER COLLEGE UNIVERSITY AT ALBANY State University of New York

Acknowledgement

This material was developed by the Professional Development Program, Rockefeller College, University at Albany, through The Research Foundation for the State University of New York, under a training and administrative services agreement with the New York State Office of Children and Family Services.

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Stage in CONNECTIONS
*Build Job Aid***

TABLE OF CONTENTS

Module 1: Introduction	1
Purpose of this Job Aid	1
Conversion of Existing FSI Stages	2
Module 2: Beginning the FSI.....	3
Creating an FSI in CONNECTIONS	3
Creating an FSI via the Intakes Drop-down Menu	3
Creating an FSI via the Record FSI Link for an Investigation (INV) Stage.....	3
Module 3: Intake Source Window	4
What's Changing?.....	4
Navigating to the Intake Source Window for a New FSI	4
Navigating to the Intake Source Window for an FSI on the Workload	4
Identifying the Intake Source Window Components	5
Module 4: Person List Window	6
What's Changing?.....	6
Navigating to the Person List Window for a New FSI	6
Navigating to the Person List Window for an FSI on the Workload	7
Identifying the Person List Window Components	7
Multiple Person Update.....	8
Performing a Multiple Person Update	8
Module 5: Family Relationship Matrix Window	10
What's Changing?.....	10
Navigating to the Family Relationship Matrix Window from the Workload.....	10
Navigating to the Family Relationship Matrix from the Person List Window	10
Identifying the Family Relationship Matrix Window Components	11
Module 6: Narrative and Special Handling Windows.....	13
What's Changing?.....	13
Navigating to the Narrative Window for a New FSI.....	13
Navigating to the Narrative Window for an FSI on the Workload.....	14
Identifying the Narrative Window Components	14
The Special Handling Window	15
Marking a Case as Sensitive.....	15
Module 7: Behavioral Concerns and Family Issues Window.....	16
What's Changing?.....	16
Navigating to the Behavioral Concerns and Family Issues Window	16
Identifying the Behavioral Concerns and Family Issues Window Components	17
The Emergency Services Required Window	18
Identifying the Emergency Services Required Window Components	18

Module 8: Requested Services Window	19
What's Changing?.....	19
Navigating to the Requested Services Window	19
Identifying the Requested Services Window Components	20
Module 9: Decision Summary Window	21
What's Changing?.....	21
Navigating to the Decision Summary Window for a New FSI	21
Navigating to the Decision Summary Window for an FSI on the Workload	21
Identifying the Decision Summary Window Components	22
Module 10: Stage Summary Window	24
Navigation	24
Accessing the Stage Summary Window via a Case Search	24
Accessing the Stage Summary Window from the My Workload Tab	25
Identifying the Stage Summary Window Components.....	26
Module 11: Family Services Intake Log Window	27
What's Changing?.....	27
Navigating to the Family Services Intake Log Window	27
Identifying the Family Services Intake Log Window Components	28
Module 12: Record Family Services Information and Referral (I&R)	29
What's Changing?.....	29
Navigating to the Information and Referral Window	29
Identifying the Information and Referral Window Components.....	30
Module 13: Resources	31
OCFS Intranet Site: CONNECTIONS Help/Training.....	31
CONNECTIONS Regional Implementation Staff	31
Application Help Mailbox.....	31
NYS OFT Customer Care Center	31
Professional Development Program	32

Module 1: Introduction

Purpose of this Job Aid

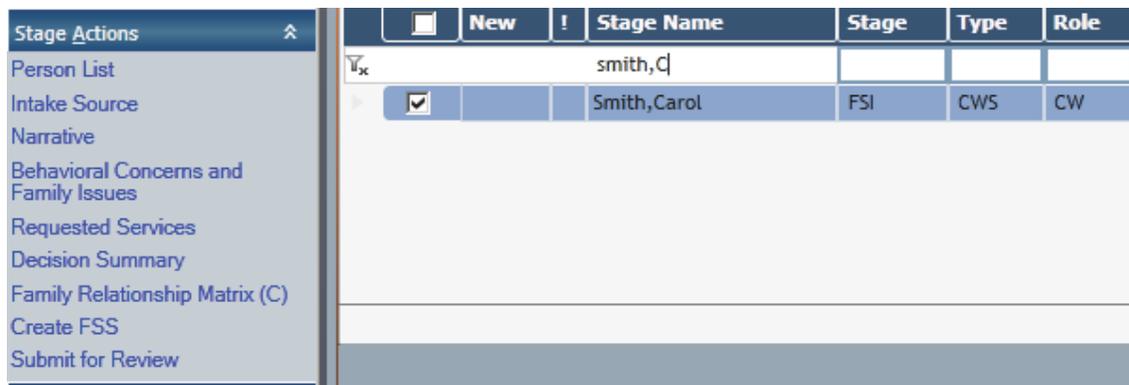
This Job Aid provides a detailed overview of the CONNECTIONS system changes being introduced with the Family Services Intake (FSI) Build. It is intended for workers who are responsible for creating, maintaining, or reviewing FSI stages in CONNECTIONS, including those with access via implied role.

The redesign of the FSI stage will change the way you do your work in CONNECTIONS; however, it is important to note that the standards and local policies for FSI will not change. You should speak with your supervisor if you have questions about this.

This Job Aid focuses on how to navigate, view, and record information on the following windows that will comprise the new FSI stage:

- Person List
- Intake Source
- Narrative
- Behavioral Concerns and Family Issues
- Requested Services
- Decision Summary
- Family Relationship Matrix
- Create FSS
- Submit for Review

The above windows are accessible via links in the **NAVIGATION PANE** when an FSI stage is selected from the workload, as shown in the image below.



The screenshot shows a software interface with a navigation pane on the left and a table of data on the right. The navigation pane is titled 'Stage Actions' and contains the following links: Person List, Intake Source, Narrative, Behavioral Concerns and Family Issues, Requested Services, Decision Summary, Family Relationship Matrix (C), Create FSS, and Submit for Review. The table on the right has columns for 'Stage Name', 'Stage', 'Type', and 'Role'. The first row shows 'smith, C' with an empty 'Stage' cell, an empty 'Type' cell, and an empty 'Role' cell. The second row shows 'Smith, Carol' with 'FSI' in the 'Stage' column, 'CWS' in the 'Type' column, and 'CW' in the 'Role' column. A checkmark is visible in the first column of the second row.

	Stage Name	Stage	Type	Role
<input type="checkbox"/>	smith, C			
<input checked="" type="checkbox"/>	Smith, Carol	FSI	CWS	CW

In addition, this Job Aid provides information on the *Stage Summary*, *Family Services Intake Log*, and *Information and Referral* windows.

Upon the implementation of this Build, the FSI will be streamlined to allow for the display of more information on a single window. The redesign will result in windows that are similar in appearance and function to those in Investigation (INV) stages and Foster and Adoptive Home Development (FAD) stages. There will also be enhancements such as expanded functions in

the *Person List* window, where users will search for a person before adding them to an FSI stage, and the *Rejection Comments* window, which will be available when an FSI has an acceptance type of “R” (Rejected). This window will be view-only and corresponds to the Rejection Reason that is available in the FSI Log.

Conversion of Existing FSI Stages

Upon implementation of the FSI Build in CONNECTIONS, FSI stages on your workload (and those previously completed) will be converted and take on the transformed appearance and function. It is not necessary to complete any in-process FSIs in preparation for the Build.

Module 2: Beginning the FSI

The purpose of the FSI is not changing; it will continue to standardize intake documentation as the path to all open services cases. Information must be recorded in CONNECTIONS before a Family Services Stage (FSS) can be opened.



All security and validations will remain the same as in the existing FSI. Follow up with your supervisor in reference to standards and local policies.

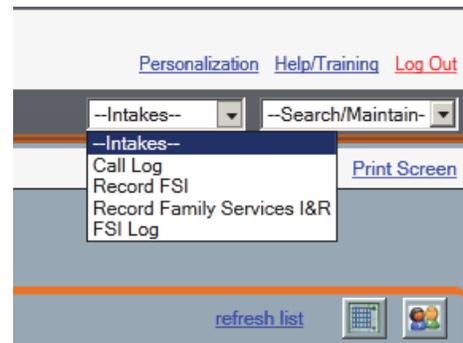
Creating an FSI in CONNECTIONS

There will be several ways to create an FSI in CONNECTIONS:

- A district or voluntary agency worker with the necessary security rights will be able to create an FSI using the **Intakes** drop-down menu on the main CONNECTIONS window.
- A CPS worker will be able to open an FSI during the investigation of a CPS report via the **Record FSI** link in the **NAVIGATION PANE**.
- An FSI will automatically open upon the approval of a CPS Investigation Conclusion when the CPS stage is closed with a “Case open-Services” Closure Reason. **Note:** *This will only occur if an FSI or FSS does not already exist in the district/jurisdiction in the case.*

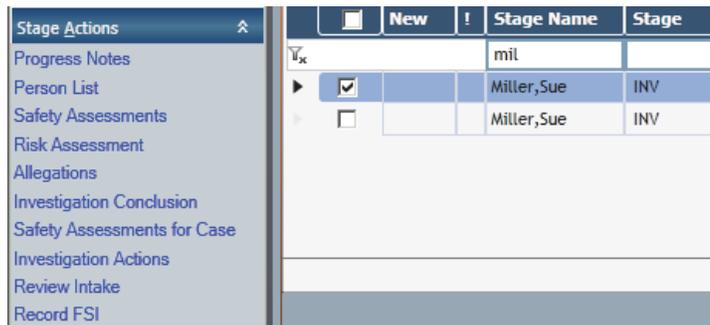
Creating an FSI via the Intakes Drop-down Menu

- 1 On the main CONNECTIONS window, click the drop-down arrow for the **Intakes** menu.
- 2 Click the **Record FSI** command.
The Intake Source window displays.



Creating an FSI via the Record FSI Link for an Investigation (INV) Stage

- 1 On the **My Workload** tab, select the appropriate INV stage.
*The **Stage Actions** section of the **NAVIGATION PANE** displays.*
- 2 Click the **Record FSI** link in the **NAVIGATION PANE**.
The workload refreshes with the new FSI stage displayed at top.



Module 3: Intake Source Window

The *Intake Source* window is where you will record source information for the FSI. Workers need to record as much relevant information (demographics, etc.) about the source (the individual or agency that referred the family for services) as is available in case any further questions arise with which the source may be able to assist. If the FSI originated from a CPS investigation, the source is pre-filled with information pertaining to the worker of the workload from which the FSI was created.

What's Changing?

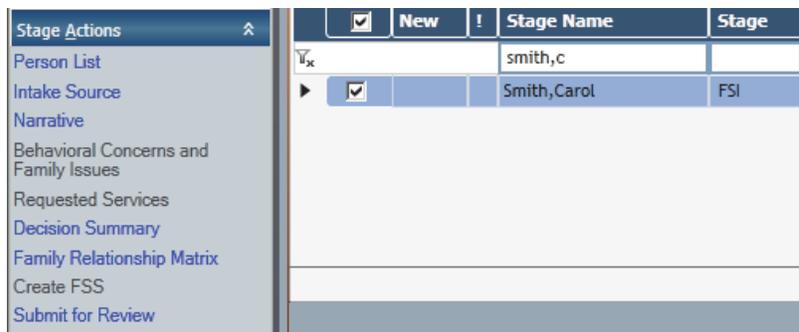
- The new *Intake Source* window will correspond to the existing **Intake Source** tab.
- Required fields will be identified by an asterisk (*).
- The **Time** field will now be required and a time spinner will be available.
- When accessed for the first time, *Intake Source* will be the active window with links available in the **NAVIGATION PANE** to the *Person List*, *Narrative*, and *Decision Summary* windows.
- The first time you save changes to the *Intake Source*, *Person List*, *Narrative*, or *Decision Summary* window, the **NAVIGATION PANE** links on the *Intake Source* window will be hidden. Navigation to the other windows will then be available from the **My Workload** tab.

Navigating to the Intake Source Window for a New FSI

- 1 On the main CONNECTIONS window, click the drop-down arrow for the **Intakes** menu.
- 2 Click the **Record FSI** command.
The Intake Source window displays.

Navigating to the Intake Source Window for an FSI on the Workload

- 1 On the **My Workload** tab, select the appropriate FSI stage.
*The **Stage Actions** section of the **NAVIGATION PANE** displays.*
- 2 Click the **Intake Source** link in the **NAVIGATION PANE**.
The Intake Source window displays.



Identifying the Intake Source Window Components

- (A) **NAVIGATION PANE** – The **NAVIGATION PANE** will contain links that provide access to the *Person List*, *Narrative*, and *Decision Summary* windows. When the *Intake Source* window is initially opened, these links are available until the first *Save & Close* or *Save*, after which navigation will be from the workload.
- (B) **Intake Detail Section** – This section will contain the Date, Time, and Method of the Intake.
- (C) **Source Information Section** – This section will be used to record the source information for the FSI. When opened from an INV stage, this section is pre-filled with information pertaining to the worker of the workload from which the FSI was created.
- (D) **Address and Phone Section** – This section will be used to record source address and phone information.



When “Self” is selected, the source information recorded carries over to the *Person List* window and becomes the Case Name. If the Source Type is not “Self,” no information carries over and the first person entered on the *Person List* window should be the Case Name. You should always save the FSI with the Case Name entered to more easily identify the case on your workload.

Module 4: Person List Window

The *Person List* window is where you will record and/or modify demographic information concerning the individuals requesting services, record and/or modify address and phone information, perform Person Searches, add and relate persons, maintain the Family Relationship Matrix, and for FSIs that originated from CPS investigations, split the FSI into two separate intakes.

For an FSI that originated from a CPS INV stage, this window will be pre-filled with the demographic information of members of the INV stage (e.g., names, addresses, gender, dates of birth, race/ethnicity). For a non-CPS FSI, if “Self” is selected as the Source Type, information from the *Intake Source* window will carry over to this window.



The first person you should record on this window is the person for whom the case should be named (typically the mother of the children), since cases are named after the Line 1 person.

What's Changing?

- The new *Person List* window will correspond to the existing **Person Demographics** tab and will be accessed using the **Person List** link in the **NAVIGATION PANE** of the main CONNECTIONS window (**My Workload** tab).
- *Person List* will be a combination window with a person list grid and person detail tabs.
- A Person Search will be performed before a person is added or related to the FSI stage (except when the Source Type is “Self”). Workers will use New Search (see below).
- The Multiple Person Update function will replace the *Maintain Primary Address and Phone* window.
- The **Incoming Person** tab and associated sub-tabs will be displayed when the person selected in the grid has been related to the FSI stage.
- Denial Letters will be removed from the FSI stage; letters were previously generated from the **Forms** menu command on the **Person Demographics** tab. If your agency generates this letter, you will have to do so locally (outside of CONNECTIONS).
- The *Family Relationship Matrix* window will be available from a link in the **NAVIGATION PANE**. When the Family Relationship Matrix is complete, a “(C)” will display in the **NAVIGATION PANE** (see Module 5: Family Relationship Matrix Window).

Navigating to the Person List Window for a New FSI

- 1 On the main CONNECTIONS window, click the drop-down arrow for the **Intakes** menu.
- 2 Click the **Record FSI** command.
The Intake Source window displays.
- 3 Click the **Person List** link in the **NAVIGATION PANE**.
The Person List window displays.



Remember, the *Intake Source* window will display active links to the *Person List*, *Narrative*, and *Decision Summary* windows until the initial save (on any one of the windows). Thereafter, access to them will be from the **NAVIGATION PANE** of the workload only.

Navigating to the Person List Window for an FSI on the Workload

- 1 On the **My Workload** tab, select the FSI stage.
*The **Stage Actions** section of the **NAVIGATION PANE** displays.*
- 2 Click the **Person List** link in the **NAVIGATION PANE**.
*The **Person List** window displays.*

Identifying the Person List Window Components

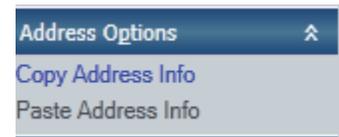
The screenshot shows a software interface for managing a person's information. On the left is a navigation pane (A) with links like 'New Search', 'Add Person', and 'Person Data'. The main area (B) contains a table of people. Below the table are tabs (C) for 'Person Info', 'Person Merge/Split', and 'Case List'. The 'Person Info' tab is selected, showing a form with various fields for personal and contact information.

- (A) **NAVIGATION PANE** – The **NAVIGATION PANE** will contain links that provide access to Person Search tasks, Address & Phone Options, and outputs such as Person Data. Two of the links that display are:
- **New Search** – You will use this link to perform a search for a person selected in the grid. That individual will populate the search window.
 - **Add Person** - You will use this link to perform a search for a person not listed in the grid. When you click the link, a blank search window will open.
- (B) **Person List Grid** – The grid will display a list of all active persons in the stage.
- (C) **Person Info, Person Merge/Split, Case List Tabs** – This section of the window will display upon selecting an individual from the grid. You can use these tabs to maintain person information, merge or split Person IDs (PIDs), and view case information.
- **Incoming Person Tab** – This tab will correspond to the **Incoming Detail** button and will display when the person selected in the grid has been related to the FSI stage.

- **Addit. (Additional Detail Tab)** - This tab will be implemented across all stages in CONNECTIONS and will be used to record pregnancy information, military status, tribal affiliation, and adoption information.

Multiple Person Update

The Multiple Person Update function will replace the Maintain Primary Address and Phone function. You will be able to perform a multiple person update for the primary address or phone for all stages (addresses and phone numbers will be copied and pasted separately.)



Performing a Multiple Person Update

- 1 Select the appropriate person (with the completed address or phone) in the grid.
*The **Person Info** tab displays.*
- 2 Click the **Address** sub-tab.
*The **Address** sub-tab displays with a grid that contains previously saved address(es).*
- 3 Select the address to be copied.
*The address prefills the Address frame. The **Copy Address Info** link enables in the **NAVIGATION PANE**.*

- 4 Click the **Copy Address Info** link in the **NAVIGATION PANE**.
*The **Paste Address Info** link enables.*
- 5 In the person grid, select the checkbox(es) of the person(s) to whom you want to apply the address.
*You can select one checkbox, multiple checkboxes, or the select all checkbox in the column header to apply the address to all persons in the grid. The **Detail** sub-tab becomes in focus with a blank **Address** field.*

<input type="checkbox"/>	Name	M/S	Sch	DOB	Approx	Sex
<input type="checkbox"/>						
<input checked="" type="checkbox"/>	Smith, Carol					F
<input type="checkbox"/>	Hamlin, Joey		R	02/06/2000		M

- 6 Click the **Paste Address Info** link in the **NAVIGATION PANE**.
The copied address displays in the fields.
- 7 Click the **Validate** button.
The Address Validation pop-up window displays.
- 8 Click the **Accept** button.
*The **Detail** sub-tab displays with **Save & Close**, **Save**, and **Reset** buttons enabled.*
- 9 Click the **Save & Close** or **Save** button.
The Person List window displays.

Module 5: Family Relationship Matrix Window

The Family Relationship Matrix (FRM) is a tool for recording relationships among family members. On the *Family Relationship Matrix* window, you can create, modify, and invalidate relationships.

What's Changing?

- The Family Relationship Matrix will be accessible from the **NAVIGATION PANE** of the main CONNECTIONS window (**My Workload** tab) and of the *Person List* window.
- When the Family Relationship Matrix is complete, the **NAVIGATION PANE** will display a “(C)” to the right of the **Family Relationship Matrix** link.
- A checkbox in the Family Relationship Matrix list grid will replace the existing functionality of multi-selecting rows.

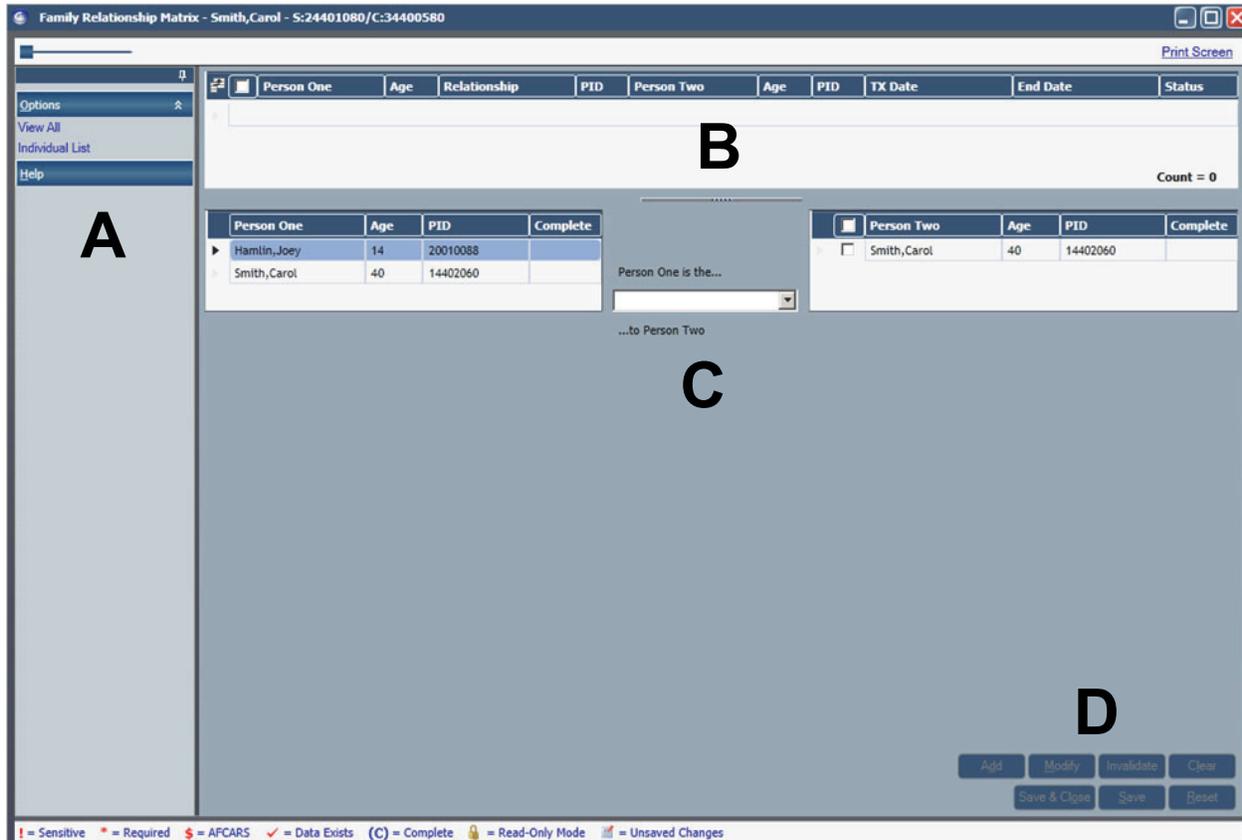
Navigating to the Family Relationship Matrix Window from the Workload

- 1 On the **My Workload** tab, select the FSI stage.
*The **Stage Actions** section of the **NAVIGATION PANE** displays.*
- 2 Click the **Family Relationship Matrix** link in the **NAVIGATION PANE**.
*The *Family Relationship Matrix* window displays.*

Navigating to the Family Relationship Matrix from the Person List Window

- 1 On the **My Workload** tab, select the FSI stage.
*The **Stage Actions** section of the **NAVIGATION PANE** displays.*
- 2 Click the **Person List** link in the **NAVIGATION PANE**.
*The *Person List* window displays.*
- 3 Click the **Family Relationship Matrix** link in the **NAVIGATION PANE**.
*The *Family Relationship Matrix* window displays.*

Identifying the Family Relationship Matrix Window Components



- (A) **NAVIGATION PANE** – The **NAVIGATION PANE** will contain links that provide access to View All and Individual List.
- (B) **Family Relationship Matrix List Grid** – The grid will display all active relationships in the stage.
- (C) **Person One and Person Two Grid Section** – This section of the window will display the **Person One** grid and **Person Two** grid, as well as the relationship selection drop-down field. The grids display stage member names, ages, and PIDs, as well as a **Complete** column. A red checkmark will display in the **Complete** column after a relationship has been added.
- (D) **Footer** – The footer will contain **Clear**, **Save & Close**, **Save**, and **Reset** buttons, as well as the following:
- **Add** – Clicking this button will add the relationship to the grid after it has been established.
 - **Modify** – Clicking this button will modify the status of a valid relationship (e.g., partner becomes spouse).
 - **Invalidate** – Clicking this button will invalidate a relationship.



Follow these guidelines to complete the FRM most efficiently:

- Begin recording relationships starting with the oldest generation and working down (Great grandparent, then Grandparent etc...)
- Do not select another person in the **Person One** list until all relationships have been recorded for that person.
- Within a generation, select a Person One who has the same relationship with multiple people (e.g. unrelated home member) before one who has many different relationships.

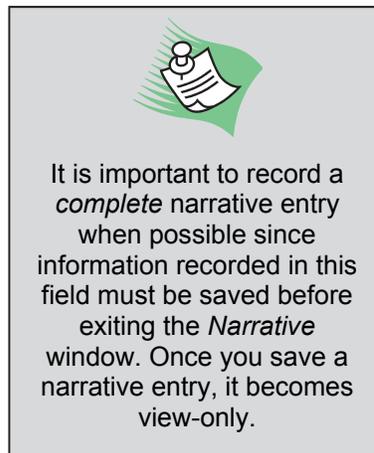
Module 6: Narrative and Special Handling Windows

The *Narrative* window is where you will record information supporting the request for services. It consists of the **Type of Services being requested** field and a narrative field.

Once you select a Type of Service, presenting problems, concerns, and contributing factors must be recorded in a narrative. For CPS stages, you must describe why this case is being opened for services. It is important to provide as much detail as possible, since there will be no link to the Safety Assessment and Risk Assessment Profile. It is important to describe the reasons for the referral in terms of the family's situation and needs without explicitly mentioning the CPS report or investigation.

This is particularly important for unfounded investigations. Given that unfounded investigations are legally sealed, the content of the narrative for unfounded CPS stages needs to preserve confidentiality; you should discuss the presenting problems, not the investigation outcome.

You must record a narrative entry before the FSI can be submitted for review or acceptance.

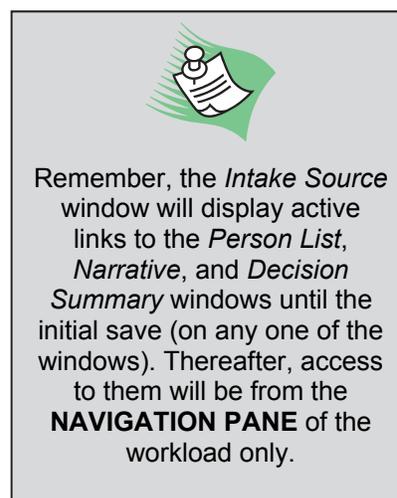


What's Changing?

- The new *Narrative* window will correspond to the existing **Narrative** tab and will be accessed using the **Narrative** link in the **NAVIGATION PANE** of the main CONNECTIONS window (**My Workload** tab).
- The **Sensitive Case** button will be removed and you will be able to mark the case as sensitive via the *Special Handling* window, which will be accessible via a link on the *Narrative* window.
- The *Behavioral Concerns and Family Issues* window and the *Requested Services* window will be accessed using links in the **NAVIGATION PANE** of the main CONNECTIONS window (**My Workload** tab) (see Module 7: Behavioral Concerns and Family Issues Window and Module 8: Requested Services Window).

Navigating to the Narrative Window for a New FSI

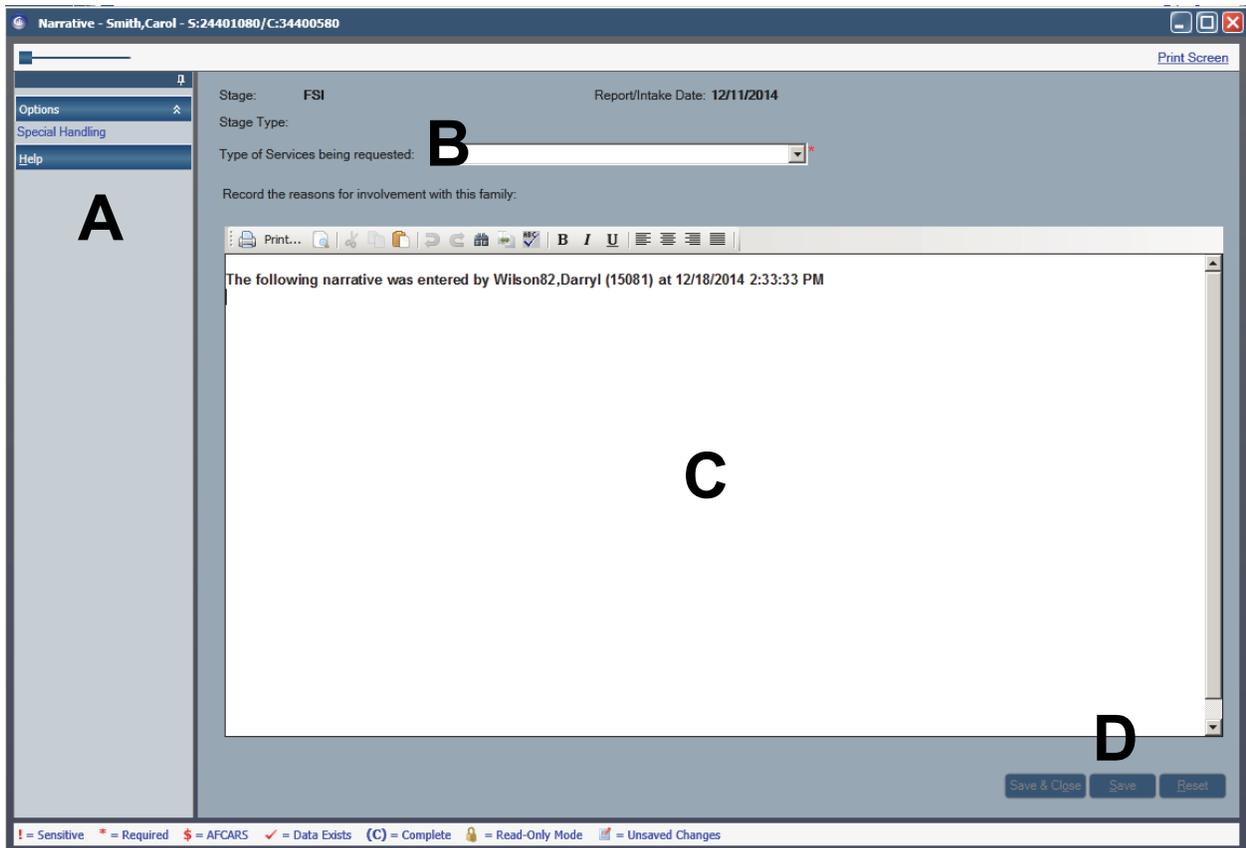
- 1 On the main CONNECTIONS window, click the drop-down arrow for the **Intakes** menu.
- 2 Click the **Record FSI** command.
The Intake Source window displays.
- 3 Click the **Narrative** link in the **NAVIGATION PANE**.
The Narrative window displays.



Navigating to the Narrative Window for an FSI on the Workload

- 1 On the **My Workload** tab, select the FSI stage.
*The **Stage Actions** section of the **NAVIGATION PANE** displays.*
- 2 Click the **Narrative** link in the **NAVIGATION PANE**.
The Narrative window displays.

Identifying the Narrative Window Components



- (A) **NAVIGATION PANE** – The **NAVIGATION PANE** will contain a link that provides access to the *Special Handling* window.
- (B) **Type of Services being requested Field** – This drop-down field will be used to select the type of services being requested, such as ADVPO (Advocates Preventive Only), COI (Court Ordered Investigation), CWS (Child Welfare Services), ICPC (Interstate Compact for the Placement of Children), or OTI (Out of Town Inquiry).
- (C) **Narrative Field** – The narrative field will include Word-like text tools and be used to record reasons for involvement with family.
- (D) **Footer** – The footer will contain **Save & Close**, **Save**, and **Reset** buttons.

NYC

As previously stated, local protocols are not changing with this Build. When “Advocates Preventive Only (ADVPO)” is the Service Type, only agency name, agency code, and the name of the worker assigned to the FSS must be recorded on the *Narrative* window. Please follow up with your supervisor if you have questions.

The Special Handling Window

The *Special Handling* window will be used to mark a case as “Sensitive,” which limits who has access to it. In order to view the case details for a Sensitive case, you must have a role (current or historical) in that case or have the VIEW SENSITIVE Business Function.

Special Handling - Smith,Carol - C:34400580

Print Screen

Special Handling: [Dropdown]

Worker Safety Issues

Sensitive Case

Tribe: [Dropdown] Tribe Contacted

Tribe Contact: [Input]

Tribe Contact: [Input]

Save & Close Save Reset

! = Sensitive * = Required \$ = AFCARS ✓ = Data Exists (C) = Complete 🔒 = Read-Only Mode 📄 = Unsaved Changes

Marking a Case as Sensitive

- 1 From the *Narrative* window, click the **Special Handling** link.
The Special Handling window displays.
- 2 Select the **Sensitive Case** checkbox.
- 3 Record a narrative explaining why the case is being marked as Sensitive.
- 4 Click the **Save & Close** button.
The Narrative window displays.

Module 7: Behavioral Concerns and Family Issues Window

The Behavioral Concerns and/or Family Issues is a non-CPS intake screening tool used to document behavioral concerns and/or issues requiring emergency services, interventions or referrals, if applicable. It provides both district and voluntary agency workers with important information about the presenting service needs of children, youth, and families at the point of intake.

What's Changing?

- The *Behavioral Concerns and Family Issues* window will be accessed using a link in the **NAVIGATION PANE** of the main CONNECTIONS window (**My Workload** tab).
- The **Behavioral Concerns and Family Issues** link will enable upon selecting "Child Welfare Services" in the **Type of Services being requested** field and saving the *Narrative* window.
- The tabs in the current *Behavioral Concerns and Family Issues* window will be replaced with a grid that will provide the ability to see all selections for Child, Caretaker, and Family.

Navigating to the Behavioral Concerns and Family Issues Window

- 1 On the **My Workload** tab, select the FSI stage.
*The **Stage Actions** section of the **NAVIGATION PANE** displays.*
- 2 Click the **Behavioral Concerns and Family Issues** link in the **NAVIGATION PANE**.
*The *Behavioral Concerns and Family Issues* window displays.*

Identifying the Behavioral Concerns and Family Issues Window Components

The screenshot displays the 'Behavioral Concerns and Family Issues' window. At the top, it shows 'Stage: FSI' and 'Report/Intake Date: 12/11/2014'. Below this, 'Stage Type: CWS' is indicated. A 'Concern:' section prompts the user to select behavior concerns, and a 'Critical:' section prompts for critical concerns. The main area is divided into three sections, each with a grid of concerns and a narrative field:

- Child behavioral concerns and/or issues:** Includes items like 'Aggressive or defiant behavior', 'Alcohol misuse', 'Destruction of personal or community property', 'Developmental status or cognitive ability impaired', and 'Drug misuse'.
- Caretaker behavioral concerns and/or issues:** Includes items like 'Alcohol misuse', 'Developmental status or cognitive ability impaired', 'Domestic violence', 'Drug misuse', and 'Illegal activity, harmful relationships or groups'.
- Family behavioral concerns and/or issues:** Includes items like 'Appearance or reappearance of a dangerous individual', 'Food, clothing or shelter needs unmet', 'Family crisis; death of a family member, fire or other', and 'Income inadequate to meet family's basic needs'.

Each grid has 'Concern' and 'Critical' columns with checkboxes. Narrative fields are labeled 'Specify all relevant behaviors and/or circumstances identified.' The footer contains 'Save & Close', 'Save', and 'Reset' buttons.

- (A) **NAVIGATION PANE** – The **NAVIGATION PANE** will contain a link that provides access to the *Emergency Services Requested* window.
- (B) **Behavioral concerns and/or issues Grids** – These three grids will allow you to select behavioral concerns and/or issues for the child, caretaker(s), and family. The grids will contain two checkbox columns, **Concern** and **Critical**, to allow for multiple selections.
- (C) **Narrative Fields** – The narrative fields will be disabled by default. Selecting a concern in the associated grid will enable the narrative field. The **Spell Check** button is removed; however, spell check is available.
- (D) **Footer** – The footer will contain **Save & Close**, **Save**, and **Reset** buttons.

The Emergency Services Required Window

The *Emergency Services Required* window will display a list of emergency services that may be provided to address the critical behavioral concerns and/or issues that were identified on the *Behavioral Concerns and Family Issues* window (e.g., Detox Services, Order of Protection).

Identifying the Emergency Services Required Window Components

The screenshot shows a software window titled "Emergency Services Required - Smith, Carol - S:24401080/C:34400580". The window has a "Print Screen" button in the top right corner. On the left side, there is a "Help" link labeled with a large letter "A". The main area contains a table with the heading "Choose appropriate emergency services to address issues identified." and a list of services with checkboxes, labeled with a large letter "B". Below the table is a text area for documentation, labeled with a large letter "C". At the bottom right, there are "OK" and "Reset" buttons, labeled with a large letter "D". The status bar at the bottom includes icons for Sensitive, Required, AFCARS, Data Exists, Complete, Read-Only Mode, and Unsaved Changes.

Choose appropriate emergency services to address issues identified.	
<input type="checkbox"/>	Adoption Surrender
<input type="checkbox"/>	Crisis Response Services
<input type="checkbox"/>	Detox Services
<input type="checkbox"/>	Domestic Violence Services
<input type="checkbox"/>	Emergency Food, Cash, Goods
<input type="checkbox"/>	Emergency Health Related Services
<input type="checkbox"/>	Emergency Housing
<input type="checkbox"/>	Emergency Mental Health Services/Evaluation
<input type="checkbox"/>	Family Preservation Services (Intensive Home based)
<input type="checkbox"/>	Foster Care Services for Children
<input type="checkbox"/>	Order of Protection
<input type="checkbox"/>	Respite Care
<input type="checkbox"/>	Other (Specify in narrative)

Document emergency services offered and immediate actions taken, including Family and Community resources.

- (A) **NAVIGATION PANE** – The **NAVIGATION PANE** will contain a link that provides access to the *Help* window.
- (B) **Emergency Services Grid** – The grid will contain a list of emergency services and a checkbox column for selecting the appropriate services.
- (C) **Narrative Field** – When you select a service in the grid, the narrative field will enable and must be completed.
- (D) **Footer** – The footer will contain **OK** and **Reset** buttons. The **OK** button will enable after a narrative has been recorded.

Module 8: Requested Services Window

The *Requested Services* window is where you will select from a list of services that may be provided to a family. Some districts may require completion of this window for all FSIs with a “Child Welfare Services” Type of Services (one that did not originate from a CPS investigation). This window is required if the district mandates its completion or if the voluntary agency completing the FSI contracts with a district that requires its completion.

On this window, you should select the services that the source or family has requested from the agency. In the process of service planning for a family, this could help determine what services the agency will provide.

What’s Changing?

- The *Requested Services* window will be accessed using a link in the **NAVIGATION PANE** of the main CONNECTIONS window (**My Workload** tab).
- The **Requested Services** link will enable after making a selection in the **Type of Services being requested** field and saving the *Narrative* window.

Navigating to the Requested Services Window

- 1 On the **My Workload** tab, select the FSI stage.
*The **Stage Actions** section of the **NAVIGATION PANE** displays.*
- 2 Click the **Requested Services** link in the **NAVIGATION PANE**.
*The *Requested Services* window displays.*

Identifying the Requested Services Window Components

Requested Services - Smith, Carol - S:24401080/C:34400580

Print Screen

Help

A

Stage: **FSI** Report/Intake Date: **12/11/2014**
Stage Type: **CWS**

Requested Services. Choose all that apply.

<input type="checkbox"/>	Adoption Services
<input type="checkbox"/>	After School Programs
<input type="checkbox"/>	Aftercare
<input type="checkbox"/>	Alcohol Counseling/Treatment
<input type="checkbox"/>	Assisted Living
<input type="checkbox"/>	Batterer's Counseling
<input type="checkbox"/>	Case Management Services
<input type="checkbox"/>	Casework Counseling
<input type="checkbox"/>	Child Care Services
<input type="checkbox"/>	Clinical Services
<input type="checkbox"/>	Community Advocacy
<input type="checkbox"/>	Crisis Response Services
<input type="checkbox"/>	Day Care Services
<input type="checkbox"/>	Day Services
<input type="checkbox"/>	Day Treatment
<input type="checkbox"/>	Detox Services
<input type="checkbox"/>	Developmental Disability Services
<input type="checkbox"/>	Diagnostic Evaluation
<input type="checkbox"/>	Domestic Violence Services
<input type="checkbox"/>	Drug Counseling/Treatment
<input type="checkbox"/>	Early Intervention Services
<input type="checkbox"/>	Educational and Training Services
<input type="checkbox"/>	Emergency Cash/Goods
<input type="checkbox"/>	Emergency Food

B

C

Save & Close Save Reset

! = Sensitive * = Required \$ = AFCARS ✓ = Data Exists (C) = Complete 🔒 = Read-Only Mode 📄 = Unsaved Changes

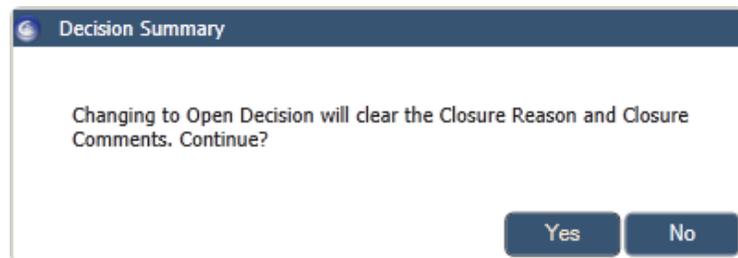
- (A) **NAVIGATION PANE** – The **NAVIGATION PANE** will contain a link that provides access to the *Help* window.
- (B) **Requested Services Grid** – The grid will contain a list of requested services and a checkbox column for selecting the appropriate services.
- (C) **Footer** – The footer will contain **Save & Close**, **Save**, and **Reset** buttons.

Module 9: Decision Summary Window

The *Decision Summary* window is where you will record a recommendation as to whether the FSI should be stage progressed to an FSS or closed with no further action.

What's Changing?

- The new *Decision Summary* window will correspond to the existing **Decision Summary** tab and will be accessed using the **Decision Summary** link in the **NAVIGATION PANE** of the main CONNECTIONS window (**My Workload** tab).
- Required fields will be identified by an asterisk (*).
- The new **Create FSS** link will correspond to the existing **Create Family Services Stage (Stage Progression)** button.
- On the existing **Decision Summary** tab, when the decision is changed from “Close Family Services Intake” to “Open Family Services Stage” and comments exist, you receive the following message: “Changing to Open Decision will clear the Closure Comments.” You cannot exit without losing recorded comments. With the implementation of this Build, you will instead be asked if you wish to continue and click a **Yes** or **No** button to confirm.



Navigating to the Decision Summary Window for a New FSI

- 1 On the main CONNECTIONS window, click the drop-down arrow for the **Intakes** menu.
- 2 Click the **Record FSI** command.
The Intake Source window displays.
- 3 Click the **Decision Summary** link in the **NAVIGATION PANE**.
The Decision Summary window displays.

Navigating to the Decision Summary Window for an FSI on the Workload

- 1 On the **My Workload** tab, select the FSI stage.
The Stage Actions section of the NAVIGATION PANE displays.
- 2 Click the **Decision Summary** link in the **NAVIGATION PANE**.
The Decision Summary window displays

Identifying the Decision Summary Window Components

- (A) **NAVIGATION PANE** – The **NAVIGATION PANE** will contain links that correspond to those on the existing **Decision Summary** tab:
- **Submit for Review** – This link will be available when the FSI is not in view-only mode or when there are unsaved changes. You will use it to submit the FSI to another worker or a supervisor for review. This link will also display on the **NAVIGATION PANE** of the **My Workload** tab.
 - **Submit for LDSS Acceptance** – This link will be used by voluntary agency workers to submit the FSI to the district for acceptance.
 - **Create FSS** – This link will be used by district workers to initiate the stage progression process, which closes the FSI stage and creates an FSS stage so that services can be provided to the family. This link will also display on the **NAVIGATION PANE** of the **My Workload** tab.
 - **Close FSI Stage** – This link will be used by workers to close the FSI stage. It will enable after comments are recorded and saved on the *Closure Comments* window.
- (B) **Is this case being evaluated for Preventive Services ONLY? Yes or No** – A step in the process of determining Programmatic Eligibility is to indicate whether the case is being evaluated for Preventive Services only. The **Programmatic Eligibility for Preventive Services** section will enable if the FSI did not originate from a CPS investigation and if “Child Welfare Services” is selected in the **Type of Services being requested** field.

- (C) **Programmatic Eligibility for Preventive Services** – This section will be used to select one or more needs that support the provision of Mandated Preventive Services.
- (D) **Application Info** – This section will contain three fields:
- **Date application sent** – This field will be used to record the date the Application for Services was sent or provided to a client.
 - **Date LDSS received application signed by Parent/Client** – This field will be used by the district worker to record the date the signed Application for Services (LDSS 2921) was received. If you record a date in this field and the **Application signed by CPS Worker** checkbox is currently selected, CONNECTIONS automatically de-selects the checkbox.
 - **Application signed by CPS Worker** – This checkbox will indicate that the CPS worker, not the client, signed the Application for Services when the CPS stage was Indicated. The CPS report must be Indicated in order for the CPS worker to sign the application. This checkbox enables if the FSI originated from a CPS investigation, *and* the worker is from a district, *and* the **Date LDSS received application signed by Parent/Client** field is blank.
- (E) **Decision** – This field will be used to select an “Open” or “Close” decision. You can modify the decision until the FSI is closed.
- (F) **Footer** – The footer will contain **Save & Close**, **Save**, and **Reset** buttons.

Module 10: Stage Summary Window

The new *Stage Summary* window will provide you with access to specific view-only stage action windows for an FSI stage (e.g., Intake Source, Narrative, Decision Summary). The “Stage Summary” event will replace the “Record Family Services Intake” event.

Navigation

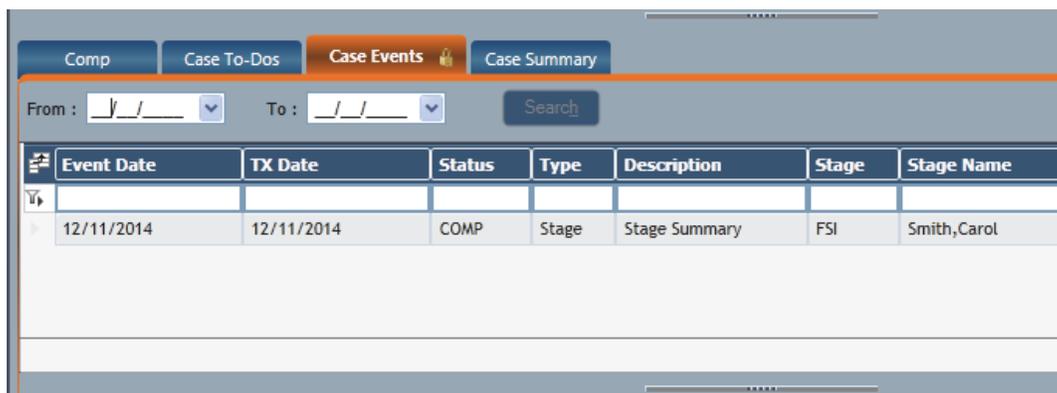
You will navigate to this window from a “Stage Summary” event accessed one of two ways:

- via the **Case Events** tab from a Case Search
- via the **Stage Events** tab on the workload

You will also be able to access the *Stage Summary* window via the FSI Log (see Module 11: Family Services Intake Log Window). No matter what access point you use, the *Stage Summary* window and all windows accessed from it will have a “[Read Only]” label to remind you that they are view-only.

Accessing the Stage Summary Window via a Case Search

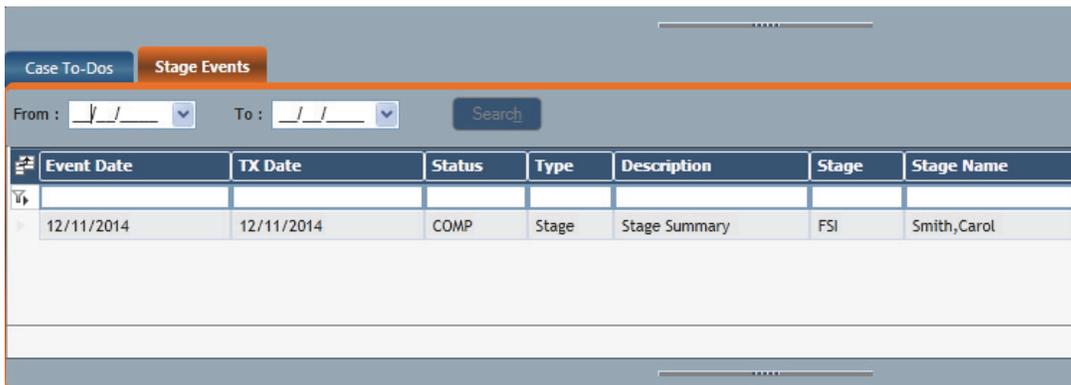
- 1 From the main CONNECTIONS window, click the drop-down arrow for the **Search/Maintain** menu.
- 2 Click the **Case Search** command.
- 3 Enter the search criteria for the case you wish to locate.
- 4 Click the **Search** button.
- 5 Select the case from the **Case List**.
*The **Comp**, **Case To-Dos**, **Case Events**, and **Case Summary** tabs display.*
- 6 Click the **Case Events** tab.
- 7 Filter for “Stage Summary” in the **Description** column, by typing the letter “S.”
- 8 Select the “Stage Summary” event.
- 9 Click the **Detail** link in the **Event Options** section of the **NAVIGATION PANE**.
*The *Stage Summary* <Case Name – Stage ID/Case ID> [Read Only] window displays.*



Event Date	TX Date	Status	Type	Description	Stage	Stage Name
12/11/2014	12/11/2014	COMP	Stage	Stage Summary	FSI	Smith, Carol

Accessing the Stage Summary Window from the My Workload Tab

- 1 On the **My Workload** tab, select the appropriate stage.
*The **Case To-Dos** and **Stage Events** tabs display.*
- 2 Click the **Stage Events** tab.
- 3 Filter for “Stage Summary” in the **Description** column by typing the letter “S.”
- 4 Select the “Stage Summary” event.
*The **Detail** link enables.*
- 5 Click the **Detail** link in the **Event Options** section of the **NAVIGATION PANE**.
The Stage Summary <Case Name – Stage ID/Case ID> [Read Only] window displays.



Event Date	TX Date	Status	Type	Description	Stage	Stage Name
12/11/2014	12/11/2014	COMP	Stage	Stage Summary	FSI	Smith, Carol

Identifying the Stage Summary Window Components

The screenshot shows a software window titled "Stage Summary - Smith, Carol - S:24401080/C:34400580 [Read Only]". The window contains the following components:

- A (Navigation Pane):** A vertical sidebar on the left with a tree view containing: Options, Case Summary, Intake Source, Narrative, Behavioral Concerns and Family Issues, Requested Services, Decision Summary, Family Relationship Matrix (C), Outputs, Family Services Face Sheet, Family Services Intake Report, and Help.
- B (Header Information):** At the top right, it displays "Stage: FSI", "Stage Type: CWS", and "Report/Intake Date: 12/11/2014".
- C (Person List Grid):** A table listing active persons in the stage.

Name	M/S	Sch	DOB	Approx	Sex	Type	Role	Rel/Int	Person ID	Date Added
Smith, Carol					F	PRN	SA	Mother	14402060	12/11/2014
Hamlin, Joey		R	02/06/2000		M	PRN	SA	Child	20010088	12/18/2014
- D (Person Info Tab):** A detailed form for the selected person, Carol Smith. It includes fields for:
 - Personal Info: First Name (Carol), Last Name (Smith), Sfx, Status (Active), PID (14402060).
 - Current Stage: Type (PRN), Role (Services Applicant), Rel/Int (Mother).
 - Demographics: Sex (Female), Language, Ethnicity (Hispanic or Latino Origin), Race (list including Black or African American, Caribbean, Haitian, etc.).
 - Address: Type (RS), Street (119 Lafayette Rd), PO Box/Apt, Attn, City (Syracuse), State (NY), Zip (13205-2922), County (ONONDAGA), CD.
 - Comments: A text area for additional notes.

- (A) **NAVIGATION PANE** – The **NAVIGATION PANE** will contain links to view-only FSI stage components (e.g., Intake Source, Narrative, Behavioral Concerns and Family Issues, Requested Services, Decision Summary, Family Relationship Matrix) and Outputs.
- (B) **Header Information** – The header will contain demographic information for the stage.
- (C) **Person List Grid** – The grid will display a list of all active persons in the stage.
- (D) **Person Info Tab** – Upon selecting a person from the grid, the **Person Info** tab and sub-tabs will display below, allowing you to view detailed information pertaining to that individual.

Module 11: Family Services Intake Log Window

The Family Services Intake Log—or FSI Log—lists intake activity within a specified time. The FSI Log is accessed from the **Intakes** drop-down menu on the main CONNECTIONS window, for users with the proper Business Functions.

What's Changing?

- The window will be streamlined to allow for the display of more information.
- On the new *Family Services Intake Log* window, Unit # will display as Unit.
- You will be able to access the *Stage Summary* window using a link in the **NAVIGATION PANE** of the window.
- The new *Rejection Comments* window will correspond to Rejection Reasons.

Navigating to the Family Services Intake Log Window

- 1 From the main CONNECTIONS window, click the drop-down arrow for the **Intakes** menu.
- 2 Click the **FSI Log** command.
The Family Services Intake Log window displays.

Identifying the Family Services Intake Log Window Components

- (A) **NAVIGATION PANE** – The **NAVIGATION PANE** will contain links to Detail, Rejection Comments, and Outputs.
- **Detail** – Clicking this link will open the *Stage Summary* window.
 - **Rejection Comments** – Clicking this link will allow voluntary agency workers to view the district’s rejection comments on the new *Rejection Comments* window. The **Rejection Comments** links will also be available from the workload when an FSI is rejected. The comments field will replace the **Rejection Reason** field.
- (B) **Search Criteria Section** – This section is where you will enter the criteria by which to conduct your search. The **District** and **Voluntary Agency** fields will prefill based on the logged-on worker.
- (C) **Search Results Grid** – After clicking the Search button, results that meet the criteria will display in the grid.

Module 12: Record Family Services Information and Referral (I&R)

On the new *Information and Referral* window, you can document that a request for information about services was received. This is helpful in assessing what types of services are being requested in a particular agency or by geographic area. The request for services could have been resolved by either providing information to the requester, by referring the requester to another agency or facility, or by informing the requester that the service requested was unavailable.

What's Changing?

- The new *Information and Referral* window will correspond to the existing window and will be accessed from the **Intakes** menu of the main CONNECTIONS window.

Navigating to the Information and Referral Window

- 1 From the main CONNECTIONS window, click the drop-down arrow for the **Intakes** menu.
- 2 Click the **Record Family Services I & R** command.
The Information and Referral window displays.

Identifying the Information and Referral Window Components

The screenshot shows a software window titled "Information and Referral". On the left is a navigation pane (A) with a "Help" link. The main area contains a table (B) with columns for "Service", "Referral Information Provided", "Referral Made by Worker", and "Service Unavailable". Below the table is a "Time Spent on Referral:" dropdown menu. At the bottom right are "Save & Close", "Save", and "Reset" buttons (C). A legend at the bottom explains various icons used in the interface.

Service	Referral Information Provided	Referral Made by Worker	Service Unavailable
Adoption	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assistance Programs (TANF, MA, HEAP, FS, SS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Child Care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Child Protective Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Directions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Domestic Violence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drug/Alcohol	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Family Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Foster Care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Housing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mental Health/Counseling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parenting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Respite	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Time Spent on Referral:

Save & Close Save Reset

! = Sensitive * = Required \$ = AFCARS ✓ = Data Exists (C) = Complete 🔒 = Read-Only Mode 📄 = Unsaved Changes

- (A) **NAVIGATION PANE** – The **NAVIGATION PANE** will contain a link that provides access to the *Help* window.
- (B) **Information and Referral Grid** – This grid will display a list of services and checkbox columns where you can select the action(s) taken in response to each request for services. You may also record the amount of time spent on the referral.
- (C) **Footer** – The footer will contain **Save & Close**, **Save**, and **Reset** buttons.

Module 13: Resources

OCFS Intranet Site: CONNECTIONS Help/Training

Many resources are available for you on the **CONNECTIONS Help/Training** page of the OCFS intranet site (http://ocfs.state.nyenet/connect_help/Default.asp). There you will find resources such as these:

- How Do I? documents
- other Job Aids
- Tip Sheets
- Quick Start Guides

These documents and others will provide you with the most up-to-date information on CONNECTIONS.

When you are working in CONNECTIONS, an easy way to access the intranet site is by clicking the **Help/Training** link on the toolbar of the main CONNECTIONS window.

CONNECTIONS Regional Implementation Staff

If you cannot find the answer to your question(s) within the documentation mentioned above, you can contact one of the many statewide CONNECTIONS Regional Implementation Staff members. The current list of members is always available on the OCFS CONNECTIONS Internet and intranet sites:

On the **Internet**:

<http://www.ocfs.state.ny.us/connect/contact.asp>

On the **intranet**:

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

Application Help Mailbox

You can directly contact the NYS CONNECTIONS User Support/Triage staff for help with complex application issues. Questions, problems, and concerns can be emailed to:

ocfs.sm.conn_app@ocfs.state.ny.us

NYS OFT Customer Care Center

The New York State Office for Technology (NYS OFT) Customer Care Center is available to answer basic questions related to your equipment, or to solve problems you are having with CONNECTIONS. If they cannot solve your problem, they will record your information and forward it to others who can. The Customer Care Center is staffed 24 hours a day, seven days a week. The telephone number is:

1-800-NYS-1323
(1-800-697-1323)

Professional Development Program

Another resource is the CONNECTIONS Training Project of the Professional Development Program (PDP), Rockefeller College, University at Albany. CONNECTIONS trainers can provide you with assistance when you have a question about or are experiencing an issue with any area of CONNECTIONS.

For assistance from a CONNECTIONS representative, contact the Professional Development Program at **CONNECTIONS@albany.edu**. Be sure to include your name, contact information, and your question or issue. A CONNECTIONS representative will respond as promptly as possible by email and/or phone.