Program and Operational Changes Supported by CONNECTIONS
Impact Analysis: Progress Notes

Subject: CPS Investigation

Functional Area: Progress Notes

Brief Description of Current Function/Process:

CPS workers are responsible for documenting their casework activities in a narrative form within the notes tab of the CPRS.

What Remains the Same:

- The nature and purpose of progress notes does not change.
- Workers will continue to document all casework activities and contacts in progress notes.
- Progress notes are still accessed through the CPRS.
- Workers may still paste notes from Quick Pads or Alpha Smart into CONNECTIONS.

What is New or Changes:

- Progress notes will be entered individually for each casework event.
- Each progress note will have data fields with drop down boxes; some are required, some are conditionally required and some are optional. These edits must be addressed before the note can be saved.
- The narrative field will have a text tool control, which provides workers with some Microsoft Word-like functionality, such as spell check, bolding, bulleting, etc.
- Progress notes will be searchable in a variety of ways (e.g. date, type, purpose, participant).
- Progress notes may be saved as draft and subsequently saved as final for up to 15 calendar days. Any notes remaining in draft within this timeframe will be saved as final by the system on the 15th day from the date it was first saved as draft. Notes saved as final by the worker or by the system will be "frozen," i.e., not modifiable.
- Workers may write an "addendum" for comments or corrections after a note has been frozen.
- Workers will be able to more easily copy narratives into other open Investigation stages in the same case (see the Impact Analysis document for CPRS General).
- A new Business Function, "Enter Progress Notes" will be added to allow on-call, clerical and other workers or supervisors, who do not have a role in the stage to add progress notes.
- The Local Notes, Supportive District Notes, and the Supervisory Review and Comments tabs will no longer be available for post Build 16 cases.

- The Local Protocol Tab will be available for Investigations within local districts that have submitted a local template (ACS, Delaware, Erie, Putnam and Schoharie).

Implications/Considerations:

System:
- Changes to the Progress Notes tab will enhance functionality over the life of a stage because of the new search functions.
- Access to Progress Notes tab will be consistent with the current CPRS tab structure.
- All stages with an intake date on or after the implementation of Build 16 will contain the new copy/paste functionality for greater ease of use.

Program:
- All workers on a case will have view access to all progress notes entered by any worker assigned to the case. This will keep workers up-to-the minute on case events and activities.
- The required data fields will add greater accuracy and specificity to the contents of a progress note.
- The new "Enter Progress Note" Business Function will give districts the ability to have on-call and other clerical/support staff enter progress notes on a case in which they do not have a role. Users given this business function will have the ability to enter a progress note in any open Investigation stage in the district. This will require supervision, procedural directives and training for those given that business function.
- The ability to create a To Do for a specific worker/supervisor to enter a progress note in a specific stage/case will give that person access to only the Progress Notes tab and detail for that stage.
- The improved functionality to search progress notes in a number of different ways will help staff in preparing reports and filing petitions as well as help supervisors fulfill monitoring responsibilities.

Recommendations/Next Steps:

1. Amend/develop local district policies on the supervisory approval process in light of the fact that progress notes will freeze 15 days after being entered in draft form.
2. Supervisors should become familiar with using search/sort functionality as a monitoring tool.
3. Develop appropriate policies and procedures on when addendums should be entered.
4. Develop local district procedures for assigning the "Enter Progress Notes" Business Function to agency staff.
5. Advise agency legal and Family Court personnel of changes to format of progress notes.