

# CONNECTIONS

*NYS Office of Children and Family Services*

*Dated: June 22, 2006*

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## CONNECTIONS Build 18.8 Release Notes

*(A description of the Build modifications, enhancements, fixes and impacts)*

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## **What is contained in Build 18.8...**

Below is a listing by User and Area Affected, Issue Description and Fix/Impact, and System Investigation Request number (SIR). Please note that SIR's that are combined reflect the work involved to affect the changes required.

This Build features user requested enhancements, modifications and fixes to CONNECTIONS application functionality. Highlighted below are a few of the most requested enhancements. Other enhancements are denoted within the text of the Release Notes.

- **SIR 4088:** 24 Hour note must be completed prior to creating a Summary note
- **SIRs 2310 & 4513:** the Case Manager, Case Planner and any associated Case Worker roles will be brought forward when a CCR is created.
- **SIRs 3335 & 3983:** two new Outcomes will be added to the Achieved options to allow workers to update the O&A blocks with the appropriate status of Closed ~ Outcome Achieved or Closed ~ Outcome not achieved.
- **SIRs 2511&2518:** Local District Progress Note instructions will be added for Erie and Chautauqua Counties.
- **SIR 3017:** Anyone with Unit Summary Access to the CM or CP's workload will be able to perform the case closing process on behalf of the CM or CP.
- **SIRs 3069 & 3826:** the supervisor will no longer receive data access errors (DAE) due to duplicate RAP responses, when attempting to approve a FASP

## **Definitions of the terms used in this document...**

The **Users Affected** section identifies those individuals, by program area, who are impacted, **What is Affected** identifies the part of the application that is involved, the **Issue Description** section describes the "issue"/SIR needing resolution, the **Fix/Impact** section describes what the Build is expected to accomplish (impact) and the **SIR** section identifies the internal tracking number of that request.

## **Resources for Questions...**

- If you have *questions about local practice, policy or procedures*, please review these procedures with your supervisor.
- For *all other CONNECTIONS related questions* please contact the NYS OFT Enterprise Help Desk 1-800-697-1323.
- *Any additional WMS processing anomalies or questions* should be directed to the OCFS-IT Customer Support Help Line at 1-800-342-3727.
- *BICS issues* should be reported to the BICS hotline: 1-800-342-3010
- *SSPS issues* should be reported to Nancy Pare: 212-383-1382 or Maureen Godwin: 212-383-2483.

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## **Build 18.8**

### **Intake**

<b>Users Affected</b>	<b>What is Affected</b>	<b>Issue Description</b>	<b>Fix/Impact</b>	<b>SIR</b>
Intake Worker	Family Services Intake	When a supervisor attempts to split (create two or more cases) an FSI from the workers workload the resulting cases do not appear on either the worker's workload or the supervisor's workload. A case or stage search results in no matches found. A person search displays the case and the Case List can be accessed. When the Case Summary is selected from the Case List a Data Access Error occurs.	This code change will copy the worker with their role, from the original FSI to the newly created FSI. The user will no longer receive an error when performing a Person Search and opening the Case List and selecting Case Summary.	3083 & 4522
SCR Intake Worker	Case Merge Split	<ol style="list-style-type: none"> <li>1. Unable to merge a new CPS intake to an open FSI stage when the FSI is linked to either an open or closed CPS INV stage.</li> <li>2. ADD INFO is unable to be recorded and transmitted online in CONNECTIONS.</li> </ol>	<ol style="list-style-type: none"> <li>1. This fix will allow the SCR to merge a CPS Intake to a CONX case where there is either an open or closed FSI where that FSI was created from an INV (now either open or closed). A merge is not allowed if the only stage in the case is an open FSI created from the Toolbar and there is no other CPS stage in the case. This means that the intake worker will be able to merge new CPS intakes to create subsequent reports.</li> <li>2. ADD INFO will be completed on-line and transmitted via CONNECTIONS.</li> </ol>	3283
Intake Worker	Case List	When creating the FSS and linking the FSI/FSS to a closed case, the status of the case on the Case List window remains closed.	When the FSI is linked to a closed case and the FSI is progressed to the FSS the Case will display as Open.	3458
NYC Intake only	Family Services Intake/Stage	Multiple FSI's & FSS's are being created on the same families within district A66(NYC). A66 is all one district with different boroughs of A70, A71, A72, A73, A74 and A75 (OCI).	This fix will not allow multiple FSI's and multiple FSS's to be created in district A66. A message will display that a FSI/FSS exists in the district.	3618
SCR & CPS	Intake	When multiple INT/IRI reports are generated from the assigned workload and one of the reports errors, when the user opens one of the intakes, the wrong intake narrative may appear.	This fix will correct the problem so that the appropriate narrative is displayed..	3900

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### Family Services Stage

Users Affected	What is Affected	Issue Description	Fix/Impact	SIR
All	Family Services Stage	When creating a CCR the Case Manager role is the only role brought forward from the FSS/CWS.	When a CCR is created, this enhancement will bring forward the Case Manager, Case Planner and any associated Case Worker roles. The Case Manager will no longer need to assign roles that were previously assigned in the FSS/CWS stage.	2310 & 4513
All	Case Summary	OCFS Policy is requesting an additional closing value for FSS stages: <i>Administrative Closing</i> When a case is opened as a FSS/CWS case the user is unable to change the stage type to ADVPO. It is necessary to close the FSS/CWS stage and restart as ADVPO. This closing code may be used anywhere a FSS/CWS stage is closed and needs to be reopened for payment purposes.	This enhancement will add <i>Administrative Closing</i> as a closure reason. Users in New York City should use this new value if a case was opened as a type = CWS but should now be type = ADVPO. The use of <i>Administrative Closing</i> can be interpreted to mean that there was no break in service delivery. This closing code may also be used when a CONX case was "opened" solely to make a retroactive payment.	2383 & 4242
Supervisor	Family Services Stage	The Case Planner or Case Manager's supervisor is unable to submit a case for closure.	This fix will allow a worker with unit summary access to initiate the FSS closing process. The CM or CP's supervisor or anyone with access to the CM or CP's workload will be able to initiate the case closing process on behalf of the worker when they enter the worker's workload through Unit Summary.	3017 & 4242

### Family Assessment and Service Plan

Supervisor	Approvals	Duplicate RAP responses are made for the same question causing a data access error when the supervisor is attempting to approve a FASP preventing FASP Approvals.	This fix will change the code to select distinct responses and the user will no longer receive data access errors (DAE) when attempting to approve a FASP containing a RAP.	3069 & 3826
Case Planner	Family Assessment and Service Plan Report	When a change is made to the PC or PPG in either a CCR or CWS stage, the answer to questions that no longer apply are appearing in the Permanency Progress /Concurrent planning section and FCI sections of the final FASP report.	This fix will set the program to filter on Program Choice (PC). FASP Sections that are no longer required, due to a change in PC or PPG, are moved to the end of the report. The user will see all sections that no longer apply under the heading SUPPLEMENTAL INFORMATION NO LONGER REQUIRED.	3077 & 4557
Case Planner/ Case Manager	Family Assessment and Service Plan Report	The Initial, Comprehensive and Reassessment FASP Reports do not display PC and PPG selections for all children in the Foster Care Issues and Non LDSS Custody portions of the report. In addition, only one PC is displayed for child (ren) with multiple PC selections. This means that the approved FASP reports contain inconsistent information.	The FASP will now display multiple Program Choice's for the individual child(ren) and all Permanency Planning Goal's for all children in the case.	3234

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### Family Assessment and Service Plan cont.....

Users Affected	What is Affected	Issue Description	Fix/Impact	SIR
Case Planner	Family Assessment and Service Plan Report	When the FASP report for the child scales is printed the answer for question #7 is not aligned under the rating column.	The formatting on the report was adjusted to move the answer to the correct column.	3270
Case Planner	Family Assessment and Service Plan	The FASP can be submitted without the Family Involvement Case Planner Summary being launched in the Service Plan. Family Involvement in the Service Plan is required. <b>**NOTE:</b> The summary is not required for the "Removal Update".	The code is modified to require the Family Involvement Case Planner Summary data when a FASP or a Plan Amendment is submitted for Approval. The user will see the Family Involvement Case Planner Summary displayed in the incomplete components section and be required to complete it before submitting the FASP for approval.	3278, 3755& 3985
Case Planner	Family Assessment and Service Plan & Plan Amendment	When recording the closing of the FSS through a Plan Amendment (PA) or within the FASP, the system is looking for one active Outcome & Achievement (O&A) Block before the PA or FASP may be submitted for approval. If the Case Planner marks the status of all the O&A Blocks as "Achieved" or "Discontinued", the FASP or PA is unable to be submitted for approval.	Two new Outcomes have been added to the Achieved options to allow workers to update the O&A blocks with the appropriate status when closing the FSS: a. Closing Stage - Outcome Achieved b. Closing Stage - Outcome Not Achieved A new O&A Status is added: a. Ended - closing Stage When either 'Closing Stage - Outcome Achieved' or 'Closing Stage - Outcome Not Achieved' is selected from the Level of Outcome Achieved dropdown, and the status of 'Ended - closing Stage' is <b>not</b> selected by the user, when the user clicks Save, the following message will display: <i>"This status is not valid for this Level of Achievement"</i> . When the user selects the 'Ended - closing stage' status for any O&A block - a Warning will display: <i>"You selected the 'Ended - closing stage' status for this O&amp;A block - continue with closing this stage?"</i> Yes/No. This fix will allow the user to mark all O&A blocks as either "Discontinued" or "Achieved" when closing the FSS.	3335, 3983 & 4578
All	Family Assessment and Service Plan Report	The FASP report for CCR stages is not displaying the Program Choice and PPG for the child in the Stage Composition section of the report.	This fix will add a filter to look for the tracked child detail in the open stage. Users will see the PC and PPG displayed under the child's name on the Stage Composition Tab.	3453

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### Family Assessment and Service Plan cont.....

Users Affected	What is Affected	Issue Description	Fix/Impact	SIR
All	Family Assessment and Service Plan Report	When the checkbox "Does not apply to any child" is checked on the Appropriateness of Placement tab, the Appropriateness of Placement questions continue to display on the FASP Report.	This fix will replace all sections of the FASP Appropriateness of Placement section with one section that reads: Foster Care Issues- Appropriateness Of Placement - Does Not Apply, No child has entered, re-entered or moved since the last approved FASP or Plan Amendment. The user will no longer see the Appropriateness of Placement section when the checkbox "Does not apply to any child" checkbox is checked.	3480
Case Planner	Family Assessment and Service Plan Report	When the Program Choice is Placement and the case type is CCR, Programmatic Eligibility questions and information are inappropriately displaying/printing on the FASP report.	This fix will not display/print the Programmatic Eligibility section when the only Program Choice is Placement and the stage is a CCR.	3481
Case Planner	Family Assessment and Service Plan Report	Users are unable to submit a completed FASP for approval if the FASP is due more than 30 days from the attempted submission date.	When all the submission edits required for the FASP components are complete, the submit button will enable. When the Submit button is clicked and the FASP due date is more than 30 days from today, the following message will display: "FASP due date is more than 30 days from today. Check Service Plan Review tab for the due date of this In-Process FASP".	3508
Case Planner	Family Assessment and Service Plan Report	In the Check FASP Detail list of incomplete components the Case Planner Summary is not identified as being incomplete by node and tab. The Case Planner Summary appears on the following nodes and tabs: <ol style="list-style-type: none"> <li>1. Family Update/Case Update tab</li> <li>2. Assessment Analysis/ Family View/Child View tab</li> <li>3. Assessment Analysis/Behavioral Concerns and Contributing Factors tab</li> <li>4. Assessment Analysis/Strengths tab</li> <li>5. Assessment Analysis/Needed Improvements/Changes tab</li> <li>6. Service Plan/Family Involvement pushbutton</li> </ol>	This fix will add "Case Planner Summary" to the list of incomplete components for all nodes and tabs. This will assist the worker in identifying areas that require completion for the FASP to be submitted for approval. <ol style="list-style-type: none"> <li>1. Family Update/Case Update tab/<b>Case Planner Summary</b></li> <li>2. Assessment Analysis/ Family View/Child View tab/<b>Case Planner Summary</b></li> <li>3. Assessment Analysis/Behavioral Concerns and Contributing Factors tab/<b>Case Planner Summary</b></li> <li>4. Assessment Analysis/Strengths tab/<b>Case Planner Summary</b></li> <li>5. Assessment Analysis/Needed Improvements/Changes tab/<b>Case Planner Summary</b></li> <li>6. Service Plan/Family Involvement pushbutton/<b>Case Planner Summary</b></li> </ol>	3511

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### Family Assessment and Service Plan cont.....

Users Affected	What is Affected	Issue Description	Fix/Impact	SIR
Case Planner	Final Family Assessment and Service Plan Report	The Program Choice and Permanency Planning Goal are not displaying for the tracked child in the Initial FASP report. The PC and PPG are being picked up from an approved FASP in a closed stage where the child was previously tracked.	This fix will retrieve tracked child information from open stages only. Users should see the current PC and PPG for the child following the stage composition.	3608 & 3921
Case Planner, Case Manager	Family Assessment and Service Plan Print	When there is no Primary Caretaker (PCT) identified in a stage, the user receives a data access error and is unable to print the Assessment Summary in the FASP. The system is looking for the Family Scales even though there is no PCT listed.	The Assessment Summary print is corrected to allow the family scales to remain blank when no PCT is designated in a case and will print as required.	3683
Case Planner	Family Assessment and Service Plan	The user is unable to modify an existing visiting plan. People are not being carried forward from Visiting Plans in prior FASPS.	This fix will carry forward all people in the most recent visiting plan to the next FASP. The user will then be able to modify the visiting plan that was carried for to the next FASP.	3811
Case Planner, Case Manager	Final Family Assessment and Service Plan Report	Life Skills Assessment information is not appearing on the Final FASP Report if the child is 18 years and older. This information is required in the FASP.	This fix will change the filter in the FASP to look for individuals between 14 and 21 years old, for completion of the Life Skills Assessment.	3835
Case Planner, Case Manager	Final Family Assessment and Service Plan Report	The Level of Outcome Activity Achievement Comment box on Service Plan does not print on the FASP. This comment box should print on the Comprehensive, Reassessment and Plan Amendment Reports.	A label is added to the Comprehensive, Reassessment and Plan Amendment reports under the Status Change Date and before the Last Modified By field. The label Level of Outcome Achieved Comments will be displayed. The comments will print beneath the label.	3928
Case Planner, Case Manager	Final Family Assessment and Service Plan Report	Programmatic Eligibility is not showing up on the Final FASP Report for non-placement cases.	This fix will change the filter to carry the Programmatic Eligibility forward to the next FASP cycle in non-placement cases. The user will see the Programmatic Eligibility in all Final FASP reports for all non-placement cases.	3988
Case Planner	Family Assessment and Service Plan TPR tab	The directed narrative and comment are not printing on the FASP report on the TPR tab of Permanency Progress/ Concurrent Planning, when the response is "No" to "Has a petition to terminate parental rights been filed?", the directed narrative is displayed and a comment is required.	The fix reversed the condition to print the information when the answer is "No" for the question "Has a petition to terminate parental rights been filed?" A "No" answer will print the directed narrative. The directed narrative will not print with a "Yes" answer.	4250

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### Plan Amendment

Users Affected	What is Affected	Issue Description	Fix/Impact	SIR
Case Planner	Plan Amendment	When the user adds the <i>Case Closed to CPS</i> option on the Plan Amendment, the Safety Assessment displays to be completed. When the user checks the checkbox 'No Safety Factors' in the Plan Amendment report, no header for the Safety Assessment appears and the plan does not show there are no Safety Factors Identified.	When the <i>Case Closed To CPS</i> component exists this fix will print the Safety Assessment information including the information that No Safety Factors have been identified, in the Plan Amendment Report. The user will see the Safety Assessment with the words NO SAFETY FACTORS HAVE BEEN IDENTIFIED.	3282
Case Planner, Case Manager	Plan Amendment	There are areas of the Plan Amendment that do not print on the PA Report. They are: 1. <i>Child Entering/Reentering Foster Care</i> 2. <i>Child Moved from One Foster Care Setting to Another.</i> 3. <i>Activities prior to placement</i>	This fix will change the way the system looks for the Program Choice to determine which sections to print and will check all individuals listed in a case to determine the Program Choice.	4001

### Service Plan Review

Case Planner	Service Plan Review	When saving the invitees for an SPR, the list of invitees disappears. In addition, the outside participant push button does not enable until the other invitees are saved. Each time the SPR was updated without closing out of the window, multiple entries were generated under activities. The Service Plan Review Detail window shows 7 SPR Activities when the Detail window was only accessed twice.	This fix updated the code to look at the SPR as a single event rather than looking at each value entered as an event. This will result in one SPR event being created when the user adds invitees and the list of invitees will remain visible. The Outside Participants pushbutton will be enabled when entering the SPR window.	3075 & 3280
Case Planner	Service Plan Review	The SPR Invitees list for Worker does not include the role of CPS Worker/Monitor that is required.	This fix has added the roles of CPS Worker/Monitor and Historical Worker/Monitor to the Worker Grid in the SPR detail window. The user will see these roles in the list of workers.	3279
Case Manager	Service Plan Review	When the Case Manager updates invitees for the SPR and schedule, the Case Manager's role changes to Historical manager.	This fix will no longer change the Case Manager's role to Historical Manager The Case Manager's current role will be retained and display at the top of the worker list.	3287
Case Planner, Case Manager	Service Plan Review	When the Case Planner or Case Manager adds invitees for the SPR and schedule and then their role is unassigned, or if the user has multiple assignments and unassignments to a case their role is showing as their first historical unassignment.	This fix will modify the record to display the worker's current role in the case. The most recent active or unassigned role will appear first on the worker list.	3566

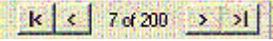
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### Progress Notes

Users Affected	What is Affected	Issue Description	Fix/impact	SIR
Erie only	Progress Notes	Erie County has submitted a local district version of progress notes instructions for the INV and FSS stages.	This enhancement will add the local district instructions to the database for Erie County that were developed by Erie County. Users in Erie county will see prompts or instructions when completing progress notes.	2511
Chautauqua only	Progress Notes	Chautauqua County has submitted a local district version of progress notes instructions for the INV and FSS stages.	This enhancement will add the local district instructions to the database for Chautauqua County that were developed by Chautauqua County. Users in Chautauqua will see prompts or instructions when completing progress notes.	2518
All	Progress Notes	When the user wants to review all the notes in a case, the user had to "Select All" and "Print" to produce the progress note report. There is a long delay in the creation of the report.	This fix will change the way notes are viewed. When the user enters the Progress Note Detail window in View mode, four buttons will appear. The buttons will allow the user to move sequentially back and forth through all notes in read-only mode, and will also allow the user to move directly to the first note or last note in the series. A count field displaying the number of the current note and the total number of notes appears in the middle of the buttons. 	3747
Case Planner/ Case Manager	Progress Notes	OCFS Policy is requesting a new value be added to progress note purposes. The purpose is: <i>Permanency Consultation</i> . This new purpose may be used with the following types: 1. Casework Contact 2. Case Conference 3. Collateral Contact The same progress note edit rules apply when Permanency Consultation is selected as a purpose as for any other contact progress note.	This enhancement is used to track the <i>consultation</i> meetings that support the requirements of the Permanency Hearing report. The addition of this purpose will assist the worker in sorting the note to retrieve the <i>Permanency Consultation</i> for inclusion in the Permanency Hearing report.  *See the full explanation in the Purpose Definitions document	3758
CPS	INV Progress Notes	Cases are being closed with only a summary note completed.	A progress note with the purpose = "24 Hour note" must be completed within the INV stage before the type of" summary" can be used. This applies to all INV stages open at the distribution of the build. *See the full explanation in the Purpose Definitions document	4088

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### Local Data Maintenance

Users Affected	What is Affected	Issue Description	Fix/Impact	SIR
LDM Worker	Local Data Maintenance	Users with the business function to perform Local Data Maintenance(LDM) are unable to modify person demographics in a closed investigation when there is an open FSI/FSS stage in the same case. When the user is attempting to update the closed case the following error message is received: "Can't modify Demographic Information of People in Open non ARI Stages, Person is linked to stage id: XXXXXXXXXX."	This fix will allow the Relationship/Interest (Rel/Int) to be modified in LDM when there is an open Non-ARI stage on the case. The message: "Can only modify relationship for People in Open non-ARI Stages; Person selected is in open stage id: XXXXXXXXXX" will display.	3917

### Technical

All	Database	A query is using more processing space than required when opening various modules using the LOGON ID Employee Table.	The modules that use this table are changed to an updated query so that processing space is reduced. This fix will increase the capacity of users to access the system.	4300
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### Miscellaneous

NYC only	Community Districts	ACS has revised the CPS Zones handling various Community Districts.	The table that determines where to assign CPS reports will be updated to reflect the requested changes.	4466
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