Attachment 1

SUGGESTED BUILD 18 PREVIEW EXERCISES

Conducting a Staff Search and Assigning a Case

Who: Any worker who needs to re-assign a stage to another staff person.

What: To reassign roles within a stage

When: Any time a stage needs to be reassigned

Here's the scenario:

You have an FSS that you want to assign to another worker.

Tasks:

Choose a case on your workload that you wish to reassign to a staff person outside your unit.
⇒Click on the **WORK** button on the CONNECTIONS Toolbar.
⇒Click on a stage to select it.
⇒Click on the **Assign** button. The Assign window displays.
⇒Click on the options menu and select **Staff Search Criteria.**
⇒Enter the name of the staff person in the appropriate fields in the Person section (note: you do not have to enter the entire name.)
⇒Enter the **agency code** if it's different from your own. (If you are searching for a staff person in a large agency, using the Unit section of this window can be helpful.)
Once you have entered the search criteria you wish to use:
⇒Click on the **Search** button. Only case -assignable staff with display.
⇒Click on the appropriate staff person's name in the staff list displayed
⇒Select the role you are assigning by clicking on "**Case Manager**, **Case Planner**, **Caseworker or CPS Worker/Monitor** button. (If this assignment is being done from a CPS Intake or Investigation stage the **Primary** or **Secondary** button is enabled and a role must be selected.)
⇒Save the assignment by clicking on the **Save** button.
⇒Exit the Assigned Workload
⇒Click on the **Close** button.

Creating a "Reminder" To-Do

Who: Anyone using CONNECTIONS

What: Creating a reminder in CONNECTIONS

When: Anytime a user wants to remind him or herself or a supervisor of an event or

requesting an action be taken by someone.

How:

⇒Click the **To Do** button on your menu bar

⇒Select one of the cases on your caseload in preview, i.e, Wilma Flintstone

⇒Record a brief description in the "Short Desc." Field. For example, "Check to see if Fred Flintstone is out of jail". If this note is to someone other than yourself, such as a supervisor, you may do a staff search by clicking on the STAFF button.

For example, if Susie Snowflake is your supervisor,

⇒Click on that name

⇒Click on the OK button. The supervisor's name will now display in the "Assigned to" field on the To-Do Detail window. If all looks correct

⇒Click on SAVE and the new To-Do is saved and displays on the Staff to do list of the person you selected. Click the CLOSE button to exit the Staff To-Do List.

Susie Snowflake will now have a reminder on her to-do list for the Wilma Flintstone case.

Creating an FSI from the Task Bar in CONNECTIONS

Who: A worker who has the function of "Record Family Services Intake" can do this. Only one worker can be assigned to an FSI at one time.

What: Preventive Child Welfare (CWS Case Type)

When: This stage is used whenever a person contacts the Local District or Voluntary Agency indicating there may be a requirement for services for a particular family unit..

The scenario:

Wilma Flintstone walks into the local DSS and states that since Pebbles has turned 16 she has been running with the wrong crowd, drinking, and smoking pot. Wilma is afraid if something isn't done soon, Pebbles may be kicked or drop out of school and she is trying to prevent that. Wilma states that Fred has been pretty supportive in dealing with Pebbles' problems even though he takes more of a passive, secondary role in the parenting of their daughter. Fred has an anger management problem when things get stressful at home.

Tasks:

Create an FSI. Use any address within your county for the case address. (For reference look at Case Management Step-by-Step Guide Pages 2-4 through 2-53.) The purpose of creating an FSI is to document the reasons for opening a services case and to document the presenting needs. Refer to Module 2 in the Case Management Step-by-Step Guide or use the "Help" function on Connections if necessary.

After completing the FSI, open the case for services and submit the FSI for Local District Acceptance. The case will then disappear from your workload as an FSI until approved by the LDSS or your supervisor.

Creating a Family Services Stage (Stage Progression)

Who: The Local District Worker who accepts the FSI, closes that stage, and opens the Family Services Stage. A Voluntary Agency worker cannot progress a case to an FSS Stage. Note: The LDSS worker who performs the stage progression is automatically assigned as the Case Manager. This person can in turn assign either LDSS or VA staff to work the case as Case Manager (must be an LDSS person), Case Planner, or Case Worker.

What: An existing FSI stage is progressed by the LDSS to a FSS (Family Services Stage)

When: Anytime the LDSS receives an FSI for acceptance and determines that an FSS is to be to be opened so services can be provided to the family on an ongoing basis. Note: This can be done from either the Assigned Workload or from the Decision Summary tab of the FSI.

The scenario:

An FSI has been assigned to your caseload for acceptance. Continue documenting with the Flintstone case. (See preview exercise for the FSI for details on the Flintstone intake.) The decision is made to open the Flintstone case for ongoing services. Pebbles continues to skip school and run with the wrong crowd, and Fred has become more emotionally abusive and still has anger management issues, especially when he drinks.

Tasks:

Progress the FSI to the Family Services Stage using Module 2 of the Case Management Step-by-Step as needed.

Suggested Build 18 Preview Tasks

TASK	CASE TYPE	CASE PARAMETERS	COMPLETE	COMMENTS	ROLE IN CASE	STAGE	
Close an Investigation opened prior to Preview, using new closing codes.	Unfounded report; referred for preventive services				CPS, CM, CPS Monitor	INV	
	Indicated report; no protective issues				CPS, CM, CPS Monitor	INV	
	Indicated report; protective issues				CPS, CM, CPS Monitor	INV	
Progress the investigation to a Family Services Stage	Unfounded report; referred for preventive services				CW at either VA or LDSS can submit, LDSS must approve	FSI to	
						FSS	
	Indicated report; no protective issues				CPS Worker, CP	FSI to	
						FSS	
	Indicated report; protective issues				CPS Worker, CP	FSI to	
						FSS	
Assign Case Planner to a Voluntary	Unfounded report; referred for preventive services	Any			LDSS Case Manager	FSS	
	Indicated report; no protective issues	Any			LDSS Case Manager	FSS	
	Indicated report; protective issues	Any			LDSS Case Manager	FSS	
Open a Services case while an investigation is in progress.	Emergency Foster Care	Child over 14			Case Planner		
					FAD worker, CPS worker		
Perform Initial Activities on Converted Services Cases	Any	Any			CW, CP, CPS Worker	FSI/FSS/INV	
	CCR	Any			Only CM can finalize adoption	FSS/CCR	
Open a Services case from a "walk-in"	Any	Child(ren) under 14			CW at either VA or LDSS can open, LDSS must approve	FSI	
Reject an FSI	Any	Any			VA Supervisor, CP, CM LDSS	FSI	
Close an FSI from a Pending referral	Any	Any			CP, CW VA or LDSS	FSI	
Schedule the Service Plan Review	Any	Any			Any one with a role in the stage	FSS	

For an in progress services case, place another child.	Any	Any			CP, CW, CM	FSI/FSS	
For an in progress services case, free a child for adoption	Any	Any					
Add a child to an existing services case	Foster Care	Any			CP, CM, CW, CPS Wkr/Monitor	FSI/FSS/INV	
Delete a child from an existing services case	Any	Any			CP, CM, CW, CPS Wkr/Monitor		
Perform a final discharge from Foster Care with a FASP in progress; close the case	Any	Any					
Launch and complete a plan amendment	Any	Any			CP, CW	FSS	
Re-open a closed case with a new family services stage.	Any	Any			CP, CW		
Document an Information and Referral	Any	Any					
Document an out of town inquiry.	Any	Any					
Open an Interstate Compact Case	Any	Any					
Reject a FASP	Any	Any					
Approve a FASP	Any	Any					
Indicate a report for a family in an already opened services case	Any	Any					
Utilize the agency access section (Org Hierarchy is already set up) and see what happens when supervisors and workers try to access records that they previously couldn't. (test Build 17)		Any					
Download text from a Quick Pad to Notes	Any	Any					
The following exercises are designed to be used by SCR workers and CPS workers to test how a new SCR report impacts an ongoing FSS.							
Open an SCR report on a Services case already in Progress.	Unfounded report, referred for preventive services	Child over 14, Child under 14			SCR Wkr. With CW, CP	INV/FSI/FSS	
	Indicated report, no protective issues	Child under 14				INV/FSI/FSS	
		Child over 14			SCR Wkr. With CW, CP		
	Indicated report, protective issues	Child under 14					
		Child over 14			SCR Wkr. With CW, CP	INV/FSI/FSS	