

CONNECTIONS

NYS Office of Children and Family Services

CONNECTIONS Case Management (Build 18) Preview Information

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This communication is intended to summarize the use of the Preview application as it pertains to Case Management (Build 18) functionality. It should be noted that the Case Management (Build 18) Preview application will function as a structured Preview environment, rather than the way that previous Preview releases have operated. We are suggesting that when users receive the Preview application they use the suggested exercises and tasks that they received when they work in the Preview application. The tasks will be identified by the stage in which they occur, as well as the type of worker that would complete the identified task. The worker may choose to execute those tasks that are pertinent to the type of work that they perform. It is not expected that all workers will complete all of the suggested tasks. Please note, that structured Preview is a tool, that workers are encouraged to use in order to support the information that was previously discussed and practiced in the various training that they received. As such, the Preview environment allows workers the ability to practice the functionality that will be presented with the implementation of Case Management (Build 18).

The following are new uses of structured Preview:

- As a management tool for Business Process Review (BPR)
- As a reinforcement for training
- As a “sandbox” where users can practice with the new functionality
- As a “preview” of converted data

The distribution of the Preview application will be by Wave assignment. The environment will be accessed through the Citrix Client Program Neighborhood (PN) Agent. Information on how to access the PN Agent has been forwarded in the CONNECTIONS Weekly Update and has also been posted on the CONNECTIONS intranet website on the Home page.

Appendix A of this document is a memo that highlights the availability of CONNECTIONS Case Management Build 18 Preview application for Waves 1 through 6W.

CONNECTIONS

NYS Office of Children and Family Services

Appendix A

MEMO

To: CONNECTIONS Implementation Coordinators, Directors of Services, Directors of Social Work, Security and Back-up Security Coordinators

From: CONNECTIONS Communications

Date: March 2, 2005

Re.: CONNECTIONS Case Management (Build 18) Preview Application for Waves 1 through 4

The CONNECTIONS Case Management (Build 18) Preview application, with converted WMS data and a snapshot of CONNECTIONS Production, will be available to Waves 1 through 4 and the NYC Field Test sites on March 8, 2005. The schedule for the Preview application for the rest of the Wave sites will be announced shortly.

We encourage you to work within the Preview application using the suggested exercises and tasks that are outlined in the attached document (Attachment 1). These tasks have been identified by the stage in which they occur, as well as the type of worker who may be completing the specific task. A worker may choose to execute those tasks that are pertinent to the type of work that they perform. It is not expected that all workers will complete all of the suggested exercises. This type of structured Preview is a tool that workers are encouraged to use in order to support the information that was previously discussed and practiced in the various training that the worker received. It should be noted that, approximately three weeks prior to implementation, CONNECTIONS Implementation Support staff would be onsite to assist users in performing these exercises and tasks.

We ask that during the use of this environment you keep track of the tasks that are completed or issues that may have been encountered, as well as features that were found to be helpful. If you have any questions or require assistance you may contact your CONNECTIONS Regional Field Support staff person.

Preview will be accessible through the Program Neighborhood ICON on the user's desktop. Information that is entered into the Preview application will not carry over into the CONNECTIONS Production database. However Family Assessment and Service Plans (FASPs) that have been completed in Preview may

CONNECTIONS

NYS Office of Children and Family Services

be printed and used to replace the UCR template. Progress Notes that are completed in Preview may be printed and placed in the case file to satisfy documentation requirements.

To access the Build 18 Preview application please follow the instructions below.

- Click on the “Connections and other Citrix Applications” icon (double click on the red ball on the icon) that appears directly on the users Desktop.
- Click on either “Connections Training Desktop 95%” or Connections Training Desktop Full” icon.
- The user must then enter their NT ID, password and domain they operate within to access the Preview environment.

Once your district has been implemented in Preview all active Child Welfare Services cases, with the service types 01/08, 08, 17, 25 & 26, will convert and a Family Services Stage (FSS) will be created.

Once the users are assigned a case within the Preview application, depending on your role in a case and your Business Function Profile, you will be able to:

- Close a pre-Build 18 investigation using Build 18 Closure Reasons
- Stage Progress an Investigation to an FSS
- Assign the Case Planner role to a Voluntary Agency
- Create an FSI
- Reject an FSI
- Close an FSI from a pending referral
- Launch a FASP
- Approve a FASP
- Reject a FASP
- Schedule a Service Plan Review (SPR)
- Launch and complete a Plan Amendment
- Document an Information and Referral (I & R)
- Document an Out of Town Inquiry (OTI)
- Open an Interstate Compact on the Placement of Children (ICPC)
- Download text from Quick Pad to Progress Notes
- Re-open a closed case with a new FSS.

It should be noted that Interfaces will not be operational in the Preview environment.

CONNECTIONS

NYS Office of Children and Family Services

Considerations

The Preview environment is a “snapshot”, at a point in time, of the CONNECTIONS Production environment. Thus, you may see cases that have subsequently been closed or, you may not see cases that have been opened since the snapshot was taken. If a worker’s your security for Build 18 has not been set up in production prior to the date the snapshot was taken, the worker will not be able to access the Build 18 functionality until their Security Profile has been set up in Preview.

Each time the Preview environment is “refreshed”, a new snapshot from production is taken and the Preview environment will be overlaid. This means that workers will lose any work performed in Preview that has not been printed.

We encourage local district and voluntary agency staff to make use of the Preview application and ask that opportunities be created for both district and voluntary agency staff to work together in a structured way to utilize the new functionality.