

Memo

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

From: Suzanne Frizzell/CONNECTIONS Implementation Team

Date: December 2, 2004

Re.: Assign Units for Family Services Intake

The purpose of this communication is to announce a pre-Build 18 (Case Management) implementation activity that will occur by December 3, 2004. Each *District/Borough and Agency* production CONNECTIONS Application will be populated with the units for Family Service Intake. It should be noted that the acceptance unit for local districts will be “FSI”, and the assign unit for voluntary agencies will be “FSS”. Each of these units will be initially populated with the district/agency’s Security Coordinator as the unit approver for the newly created unit. After these units are established, the district or agency Security Coordinator can assign staff to this unit as determined by business functions performed.

A detailed explanation of this functionality is below.

Assign Units for the Family Services Intake

When a voluntary agency initiates a Family Services Intake and *submits the FSI for review within their own agency*, the Family Services Assign window is populated with all the case assignable staff members from all the units of which the logged in worker is a member. To assign the FSI to other workers within the voluntary agency, the Staff Search function must be used.

When the voluntary agency worker is *submitting the FSI to a local district for acceptance*, the Family Services Assign window will be populated as follows:

- County Drop Down

All counties that match the primary address of any person entered in the FSI are displayed. For example, if the FSI consists of a person whose address is in Dutchess County, a person whose address is in Erie County and a person whose address is in Saratoga County all three counties will exist in the drop-down.

Once the user selects a county, the available staff list box will be populated with all workers from the Family Services Intake Unit (“FSI”) for that county. The user may either select one of these workers or, choose to assign to one of the other counties by selecting that county from the county drop down and then selecting some one from that FSI Assign Unit for that county.

Once the FSI has been submitted to, and accepted by, a local district and progressed to an FSS stage, the local district can then assign other local district workers to the FSS. To do this the local district worker would select one of the available workers from the available staff list (which is populated with all of the workers that are listed in the worker's unit), or, the worker can use Staff Search to search for other workers in their agency. The worker could also select the Family Services Intake unit menu option to populate the available staff list box with workers from the local district Family Services Intake Unit ("FSI").

If the local district worker wishes to assign to a voluntary agency, the worker can select an agency from the Agency Drop Down, click the Search pushbutton and select one of the available workers from that agency's Family Services Assign Unit ("FSS").

PLEASE NOTE: Voluntary Agencies cannot assign to any other agency; local districts cannot assign to any other district. For more information, please refer to the Impact Analysis on Intake. This document is posted on the CONNECTIONS intranet on the Implementation page.

If you have questions related to the content of this communication you may contact your CONNECTIONS Regional Implementation Field Representative.