

# CONNECTIONS

*NYS Office of Children and Family Services*

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## **Preparation Activities Pre-Day 1 All Districts and Agencies (Revised)**

As a support tool for all Districts and Agencies, the CONNECTIONS team has prepared a checklist of activities that must take place prior to day one of implementation (conversion) for Build 18

**Security:**

- The Organizational Hierarchy and Unit structure is defined
- All staff have active NT IDS and have been placed in the unit to which they belong (“in assigned”)
- All staff requiring it have been “out assigned” in units to which they need access
- All staff have correct Business Functions for their particular responsibilities, e.g. Create FSI, Enter Progress Notes, Maintain Service Plan Review, etc.
- All supervisory/management staff have “Unit Approver” or “Manager” role for the units they manage.
- All staff with workloads have been designated “Case Assignable”.
- The FSI Intake Unit (Districts) and the FSS Assign Unit (Agencies) have the correct staff assigned to them.
- No staff is associated with “Conversion Units”. If someone is in that unit, they need to be moved (assigned) to their home unit.
- The decision on who will reassign the cases dropped into the Conversion Workloads has been made.
- The Security Coordinator has assigned staff to clear out the Conversion Workloads on Day 1.
- All staff have their WMS/CCRS office/unit/worker codes entered accurately in the Staff Detail Window.

**WMS Preparation:**

- Any District staff Person who will work with Family Service Stages IN ANY WAY, needs to be defined to the WMS printer in their office (NT ID’s). The automatic interface to WMS is triggered upon pushing either the “APP REG” button, the “WMS SYNCH” button OR “SAVE” on the Family Services Stage, Stage Composition tab. If a District Worker performs an “APP REG” the clearance report will print to their designated WMS printer.
- All cases in “Application” or “Error” status will fail to convert. Cases must be in “Open” status at the time the extract for WMS case conversion is done. Be aware that “Pending” transactions may fail to convert if they result in an “Error” status.

**Data Cleanup:**

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- The most recent Conversion Planning Report has been reviewed and all pertinent corrections have been made.
- A designee at the District has been assigned to review the Conversion Audit Report on day 1. If there are errors on the report (something didn't convert as expected) one of the Implementation Support staff assigned to that district will assist in the evaluation and correction.

**Training and Support Activities:**

- All staff attended appropriate training classes
  - New Users
    - Case Management Model (Program training)
    - Intro to CONNX-Class room or CBT
      - B18 for Child Welfare Workers
  - Current Users
    - Case Management Model
    - B18 for Child Protective Workers
- All staff have reviewed the Quick Start Guide
- Staff have reviewed their cases in Preview and made corrections to legacy systems, if needed.
- Staff have completed structured preview activities
- Resource Users have been identified and have attended the appropriate training
- Business practices have been identified relative to
  - Opening a FSI
  - Assigning workers to a FSS-roles
  - Completing a FASP
  - Scheduling and documenting a Service Plan Review
- Line staff have been informed of the current business practices as identified above
- Final review and addressing of gaps identified in the district/agency self assessment
- The CONNECTIONS B18 ADM has been reviewed and relevant information has been shared with line staff
- Line staff are aware of internal procedures for reporting problems or requesting assistance with B18
- The schedule for Implementation support staff has been published to employees
- The Step-by-Step guide (either in CD or hard copy format) is accessible to all staff.