CONNECTIONS Transformation Phase 1

Job Aid

CONNECTIONS Transformation Phase I Job Aid

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Introduction

In 2009**,** OCFS initiated the CONNECTIONS Architecture Modernization Project (CAMP), with the goal of upgrading and modernizing the CONNECTIONS system as well as to implement user driven "ease of use" improvements throughout the system. Since then steps have been taken incrementally to develop a more intuitive and caseworker friendly case management system. These incremental improvements have been implemented in local districts and voluntary agencies on a quarterly basis over the last two years.

With the current implementation, an initial step is being taken toward the transformation of CONNECTIONS to a more modern system. This implementation will bring a significant change in the overall look and feel of the CONNECTIONS application. The new architecture allows more information to be displayed on one screen, provides easier access to all system functions, and streamlines overall navigation. As the transformation is rolled out, users will see a greater uniformity in the presentation of information and improvements in the overall ease of use and utility of the system.

On the technical side, enhancements in the system architecture provide for improved troubleshooting tools and a more timely distribution of system enhancements. In the future, it is anticipated that system improvements can be developed and made available to users more rapidly.

This Job Aid will assist CONNECTIONS users understand the key changes being made to CONNECTIONS at this time. The Job Aid is geared toward the line staff, supervisors and managers who complete tasks in CONNECTIONS on a daily basis. It assumes the user is familiar with CONNECTIONS.

The Job Aid does not address system changes on a screen by screen basis, but provides information regarding changes that have broad impact for daily system users. In general, changes in navigation and in overall look and feel, as described in the Job Aid, will apply to those functions that are not specifically covered. Please note that there are no changes in program guidelines or operations included.

Due to incremental systems development, users will continue to see variation in the appearance of CONNECTIONS windows until all upgrades are implemented. The current implementation introduces some windows that are new and many that have been transformed to take best advantage of technological improvements. Where possible, windows have been combined, and new functionality incorporated. Other windows have simply been modernized and will have a new overall look, but little functional change.

Phase 1 of the transformation focuses on the portions of the system that were first developed - the common functions (e.g., toolbar, workload, To-Dos), CPS Intake, Investigation, and Foster and Adoptive Home Development (FAD). Functions that have been implemented more recently, including the FSI and FSS have not been modified at this time. For staff who work on FSI and FSS Stages, Phase 1 impact is limited to a new overall look in the application when navigating from the toolbar and using common functions.

The New Look of CONNECTIONS

Casework staff will first see the changes in CONNECTIONS when they open the application and the new CONNECTIONS toolbar and redesigned **WORKLOAD & TO-DOs** tab is displayed.

The new CONNECTIONS toolbar is comprised of a series of tabs and drop-down menus. These tabs and menus, along with hyperlinks on the **NAVIGATION PANE** on the left side of the screen, provide access to various system functions. The toolbar has been reorganized. As always, the security of the logged-on worker determines access to specific system functions.

Transformed CONNECTIONS windows include a common area that displays above the main portion of the window. This common area includes a zoom control and a link for Print Screen. These functions are applicable to the entire main work area.

A legend of commonly used icons is displayed across the bottom of most windows. A new personalization feature allows users to hide the legend.

Additional information regarding these features can be found on subsequent pages of this Job Aid.

! Sensitive Case Indicator
* Field is require to save the window
‡ Field is required for AFCARS reporting
✓ Data has been entered on a dependent or child specific window
Window is in “Read Only” Mode
Unsaved Changes exist on the window

Toolbar
Title Bar

The toolbar is accessible at all times from any open window. The title bar displays across the top of the toolbar to identify the system environment currently open, for example, Production, Training, Testing. When a window is accessed in read-only mode, the title bar will display in a gray color and include the words “Read Only.” In update mode, when there are unsaved changes on a window, the words “Unsaved Changes’ will display.

A **Minimize** button displays on the right side of the title bar. In the transformed application, the Log Out link on the toolbar will close the CONNECTIONS application. Clicking on Log Out will close all open windows unless there are unsaved changes. If unsaved changes exist, a cautionary message will display allowing the worker to cancel and save changes or to continue logging out without saving changes.

Note: Clicking the Red “X” in the top right corner will close your session and any unsaved changes will be lost. Also using the Start button in the lower left corner to log off prior to closing all CONNECTIONS windows will result in unsaved changes being lost.

Using “X” does not check for unsaved changes. *DO NOT USE* to close CONNECTIONS.

System environment and name of the logged on worker is displayed on the title bar.

Log Out to exit CONNECTIONS

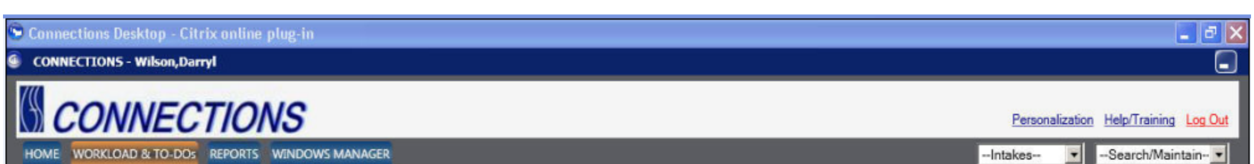
Toolbar
Tabs and Drop-Down Menus

The graphic below illustrates the main tabs and drop-down menus available from the toolbar, and the functions accessed from each one. As always, the availability of specific tabs and functions is determined by the security of the logged-on worker.

Access to some functions has been reorganized. The first tab on the toolbar is a new CONNECTIONS **HOME** tab. Functionality on the **HOME** tab will be implemented in the future. The next tab, **WORKLOAD & TO-DOs**, replaces the **TO-DO, WORK** and **UNIT** buttons on the former toolbar. It is the default tab upon opening CONNECTIONS. The next tab is for **REPORTS**. The process for launching and retrieving reports has not been modified. The last tab displayed on the toolbar is a new **WINDOWS MANAGER** tab. This tab allows the worker to view all open windows, identify windows with unsaved changes, navigate individually to each of them, stack windows, and close all open windows.

On the right side of the toolbar are drop-down menus for **Intakes** and **Search/Maintain**. All intake related functions have been grouped together and are accessed under the **Intakes** drop-down menu. The **Search/Maintain** drop down menu centralizes access to all search and maintenance functions. The values that display in these drop-down menus depends on the logged-on worker's security.

When a tab is selected, it appears highlighted. In the example below, the **WORKLOAD & TO-DOs** tab is selected. The worker can navigate freely between tabs. When each tab is accessed, with the exception of the **WORKLOAD & TO-DOs** tab, data on the tab is updated by the system. The **WORKLOAD & TO-DOs** tab must be manually refreshed in order for new information to be displayed.



•Calendar
•Notifications

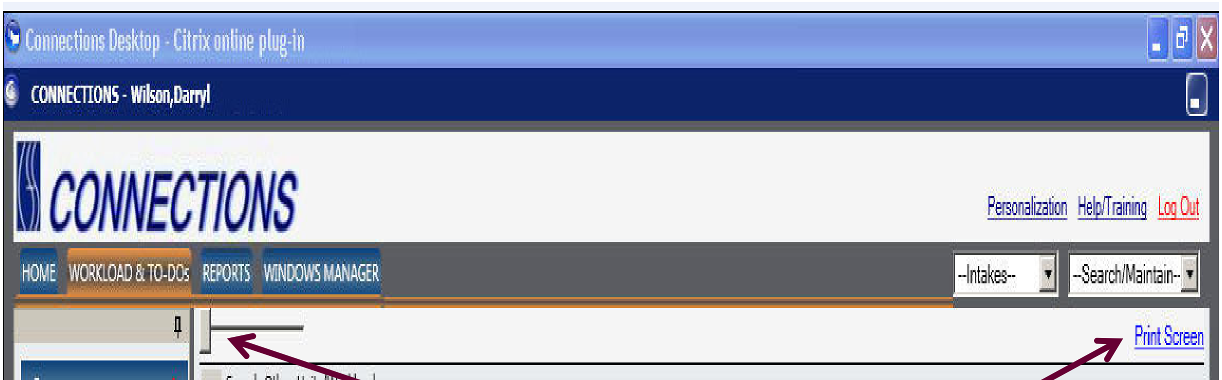
•My Workload
•My To-Dos
•Search Other Units

•Call Log
•Record FSI
•Record CPS Call
•Record Family Svc. I&R
•FSI Log
•F/A Home

•Person
•Case/Stage
•Staff/Security
•F/A Home
•Office
•Unit
•Contracts
•Org. Hierarchy
•Agency Access
•Vacancy Control
•Business Functions

Toolbar

Zoom Control, Print Screen and Help/Training

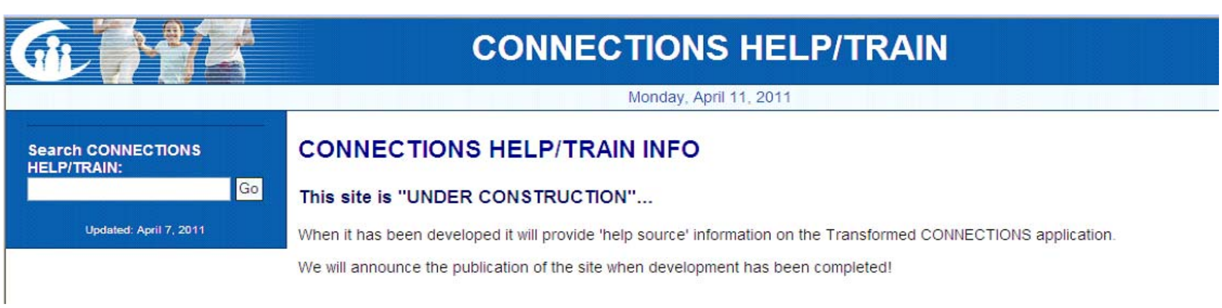


A common area supports **Zoom Control** and a link for Print Screen.

The zoom control allows for a magnified view of the main work area of a window. Sliding the slider handle to the right will zoom in the work area; sliding the slider handle to the left will zoom out. Using the zoom feature with the **NAVIGATION PANE** collapsed allows optimal magnification of the work area.

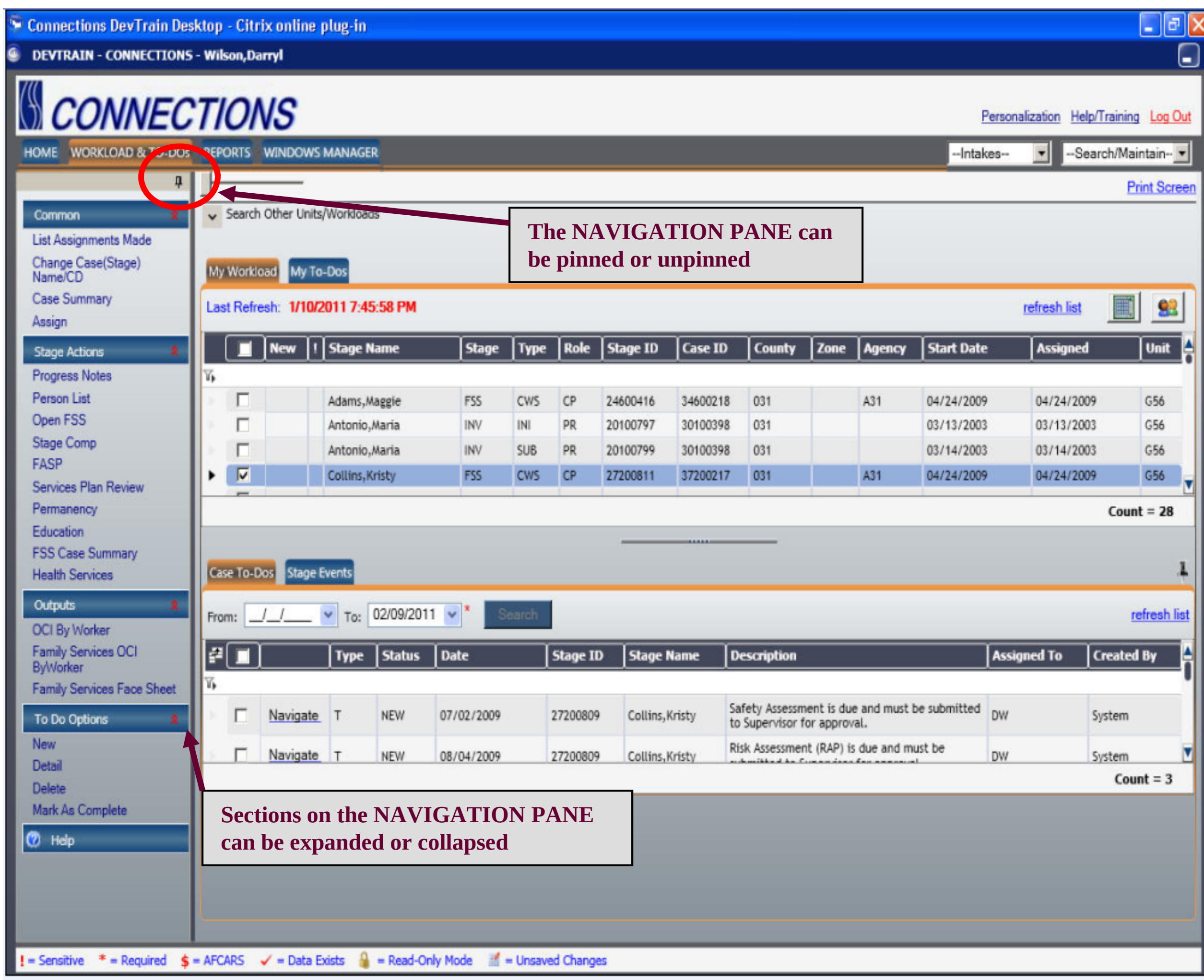
Selecting the Print Screen link prints a snapshot of information currently visible on the screen.

The Help/Training link, when selected, provides access to information related to both help and training resources for the transformed CONNECTIONS application. Among the resources that will be available are Tip Sheets, "How Do I's?" the Quick Start Guide and this job aid.



NAVIGATION PANE

In the transformed application, links access tasks for each functional area. These links display on the **NAVIGATION PANE** on the left side of a window. Each section of the **NAVIGATION PANE** can be maximized, by clicking on the expand arrow, to display all available functions. Clicking the collapse arrow again will collapse the list. The **NAVIGATION PANE** itself can also be pinned (expanded) or unpinned (hidden) by selecting the pin icon. When unpinned, the **NAVIGATION PANE** is hidden from view and the header **NAVIGATION PANE** displays at the top left side of the section. Hovering over the hidden pane will display the pane and links may be selected from it. After making a selection, the pane will again be unpinned. The pane may be restored to full size by hovering over it and clicking on the pin icon.



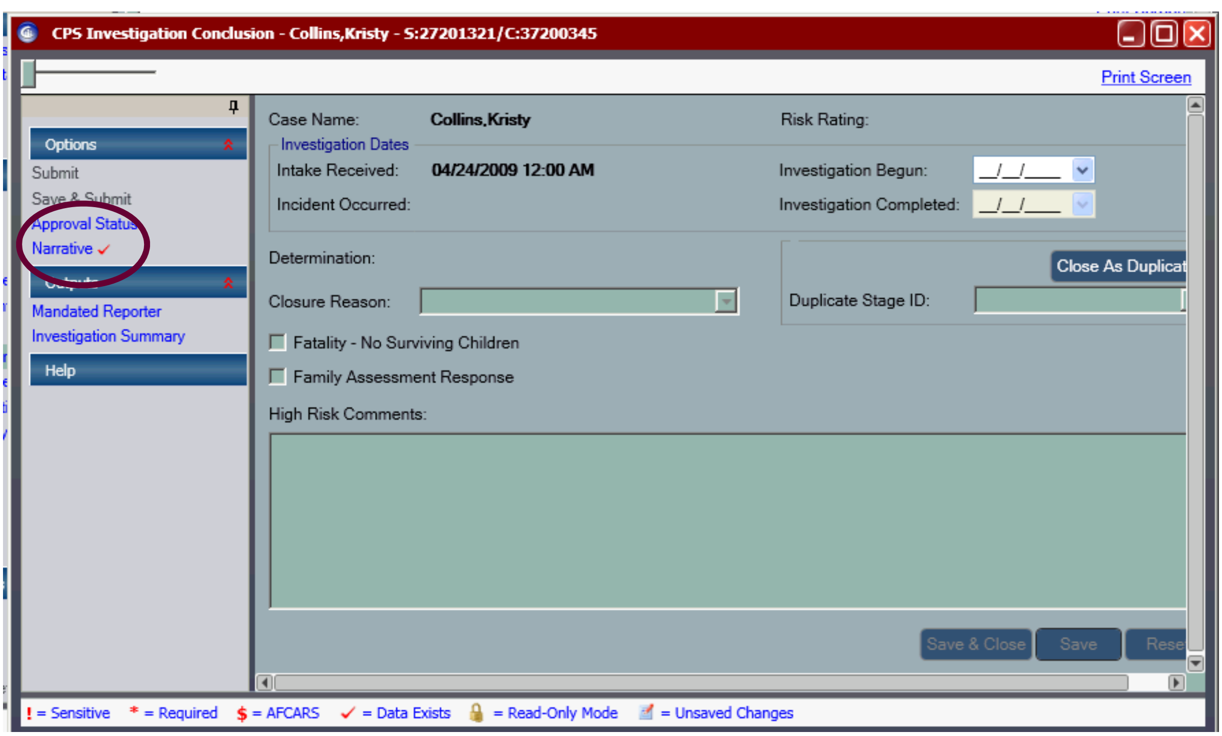
NAVIGATION PANE
Hyperlinks and Visual Cues

The display of links on the **NAVIGATION PANE** is determined by the security of the logged-on worker, and on window specific logic.

When the logged-on worker has security to access a link, but the link is not applicable based on window logic, it appears on the **NAVIGATION PANE**, but will be disabled. If the logged on worker does not have the security to access the function or window the link to it will be hidden.

Output links display only in relation to the currently open tab or window.

Visual cues have also been included on the **NAVIGATION PANE**. When the worker selects a link, the color of that link will change and when information exists in a window, a check mark displays next to the associated window link.

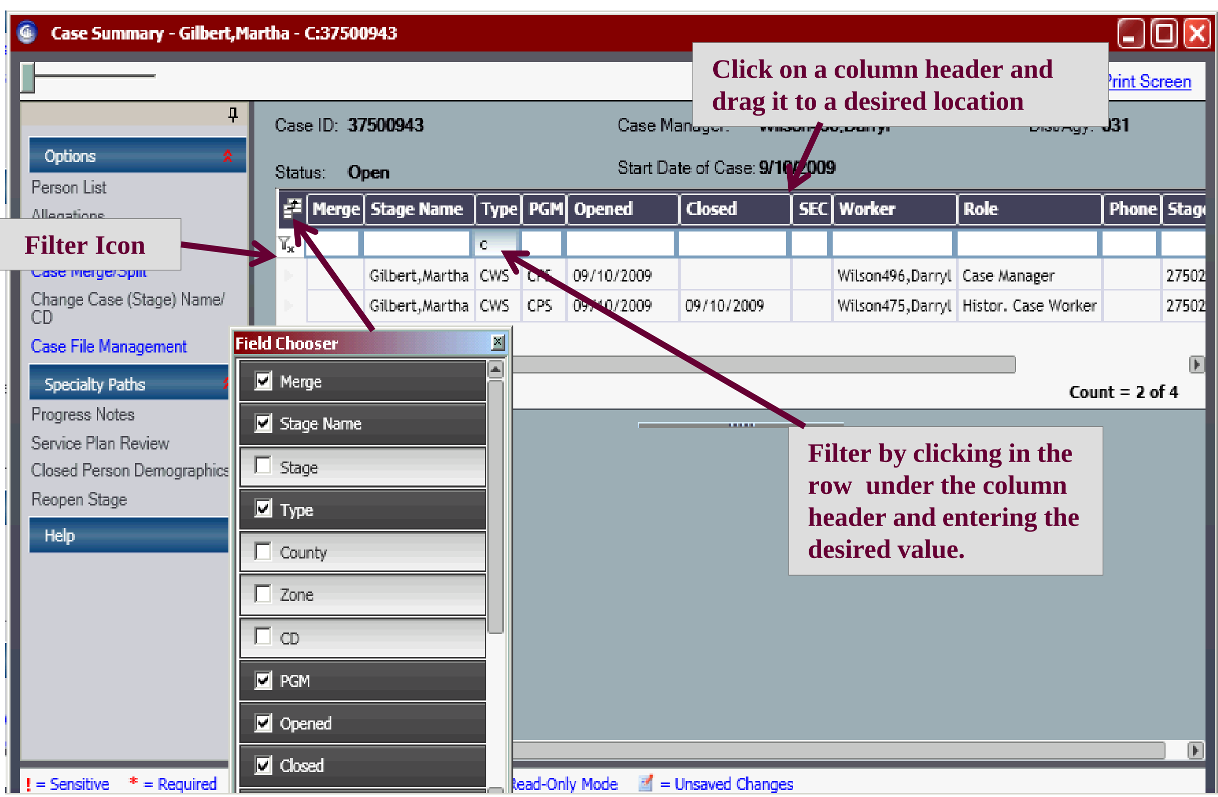


Grids
Filtering and Sorting

On transformed windows, the first blank row in a grid (below the column header) is the filter. This option allows the worker to select a column to filter, and enter specific data to display. Filtering limits the display of items in the grid to the filter criteria until the view of the grid is refreshed. For example, a filter can be applied to display just one stage type or Case ID. Multiple filters can be used together to display any combination of fields. The filter is cleared when the window is refreshed or by clicking the **Filter** icon. The display count on the bottom right of the grid denotes the filtered list.

All columns in a grid can be moved to display information in a particular order. To move a column, click on the column header and drag it to the desired location.

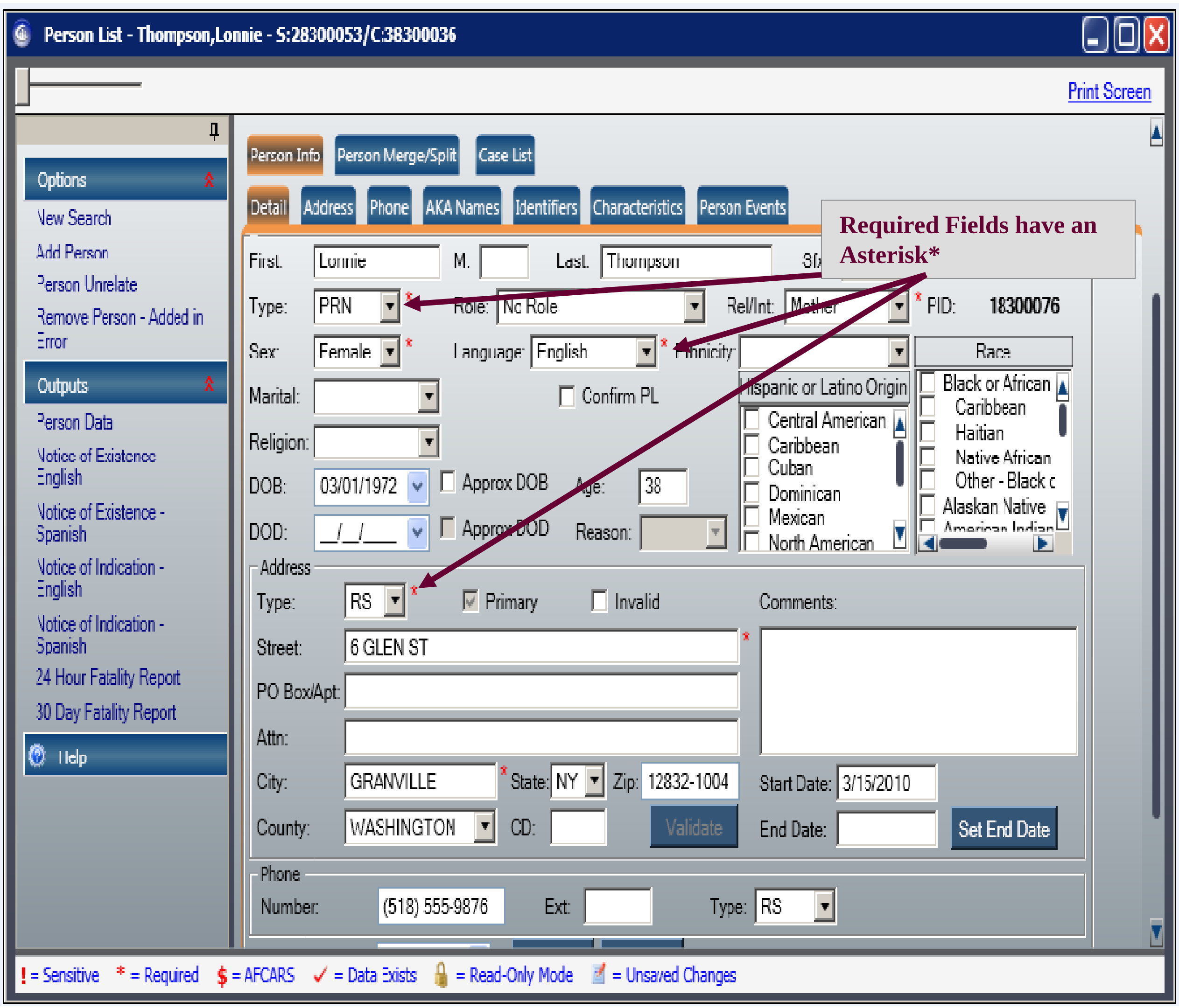
The default column sort order can be changed between ascending and descending order**.** To sort by multiple filters select a desired column one at a time.



Required Fields

Required fields on transformed windows are denoted by a red asterisk (*) next to the entry/select field. The asterisk replaces the yellow fields.

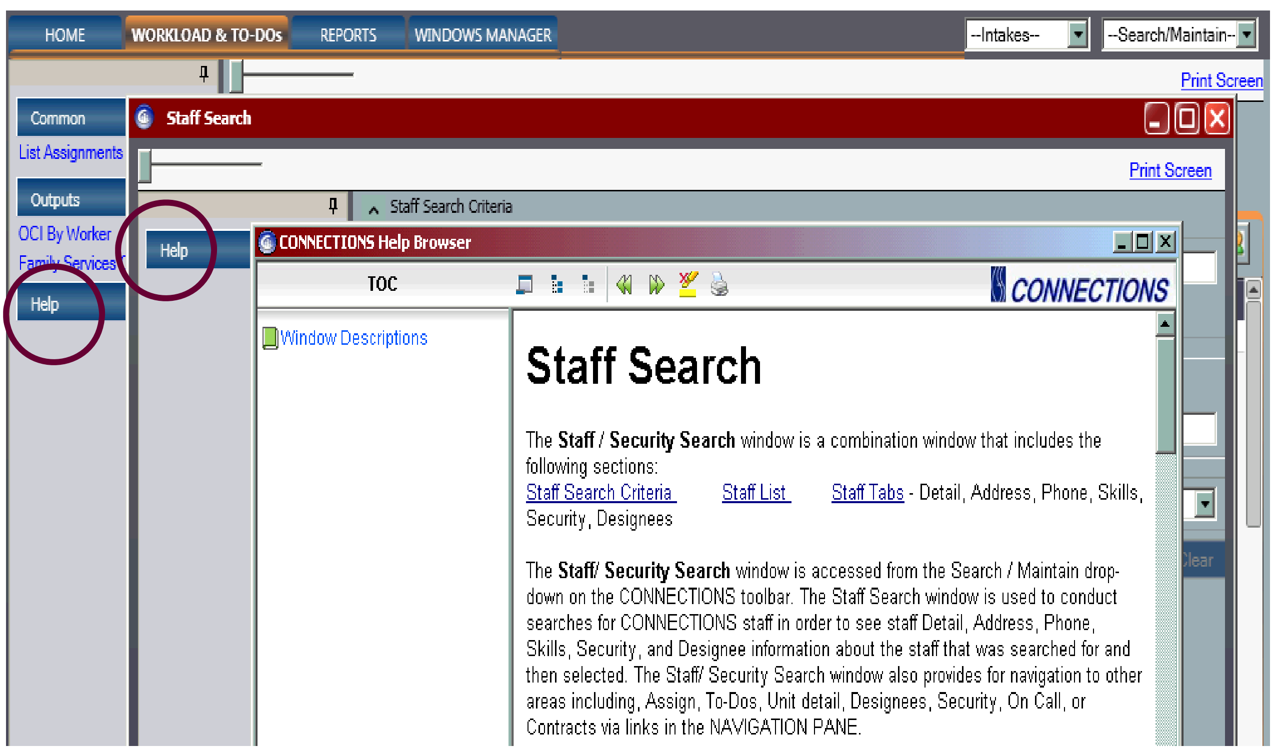
A red asterisk is displayed on conditional fields when dependant data has been entered.



Window Level Help

The transformation of CONNECTIONS will include incremental implementation of a streamlined On-Line Help component. Clicking on the Help link on the **NAVIGATION PANE** will display an alphabetical listing of the transformed tabs and windows in CONNECTIONS. When a tab or window is selected, the associated Help file will display. The top of each individual Help file includes links to each section of the tab/window. These links can be used to quickly jump to a particular section Help. Scrolling the window will display each section consecutively.

Please note that Help in the CPRS, FSI and FSS Stages has not been modified at this time.



HOME Tab

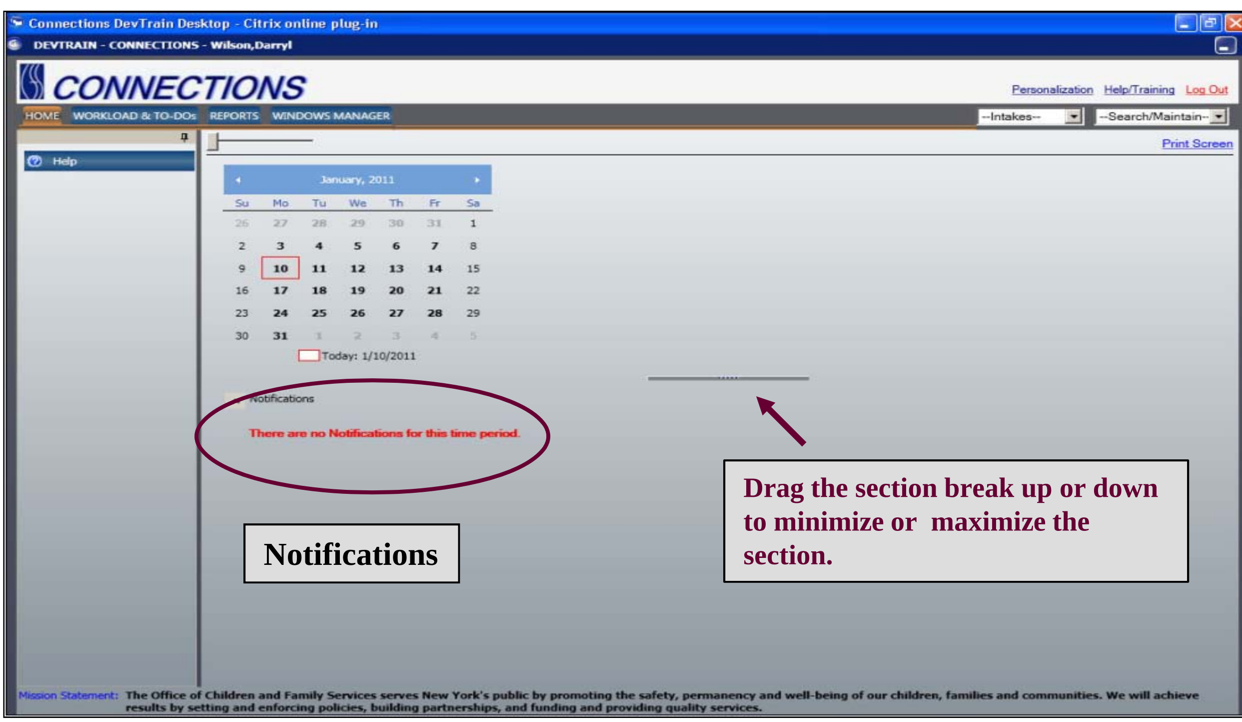
The first tab on the toolbar is a new **HOME** tab. For Phase 1, limited functionality is supported on the **HOME** tab. In the future, as additional functionality is implemented, the **HOME** tab will be a common reference and navigation point for accessing the CONNECTIONS application.

When the **HOME** tab is opened two sections display, a **Calendar** and a **Notifications** section. The calendar date is highlighted. Future functionality will allow the calendar to be used in conjunction with other parts of CONNECTIONS.

Notifications displays important information to users based on region of the State or Office Type. All current notices will display in descending chronological order. If no notifications exist, a message will display, “There are no Notifications for this time period.”

The notification date indicates the date the notice was first published. Each notification has an end date, after which time it will no longer be viewable. Notifications can not be removed manually.

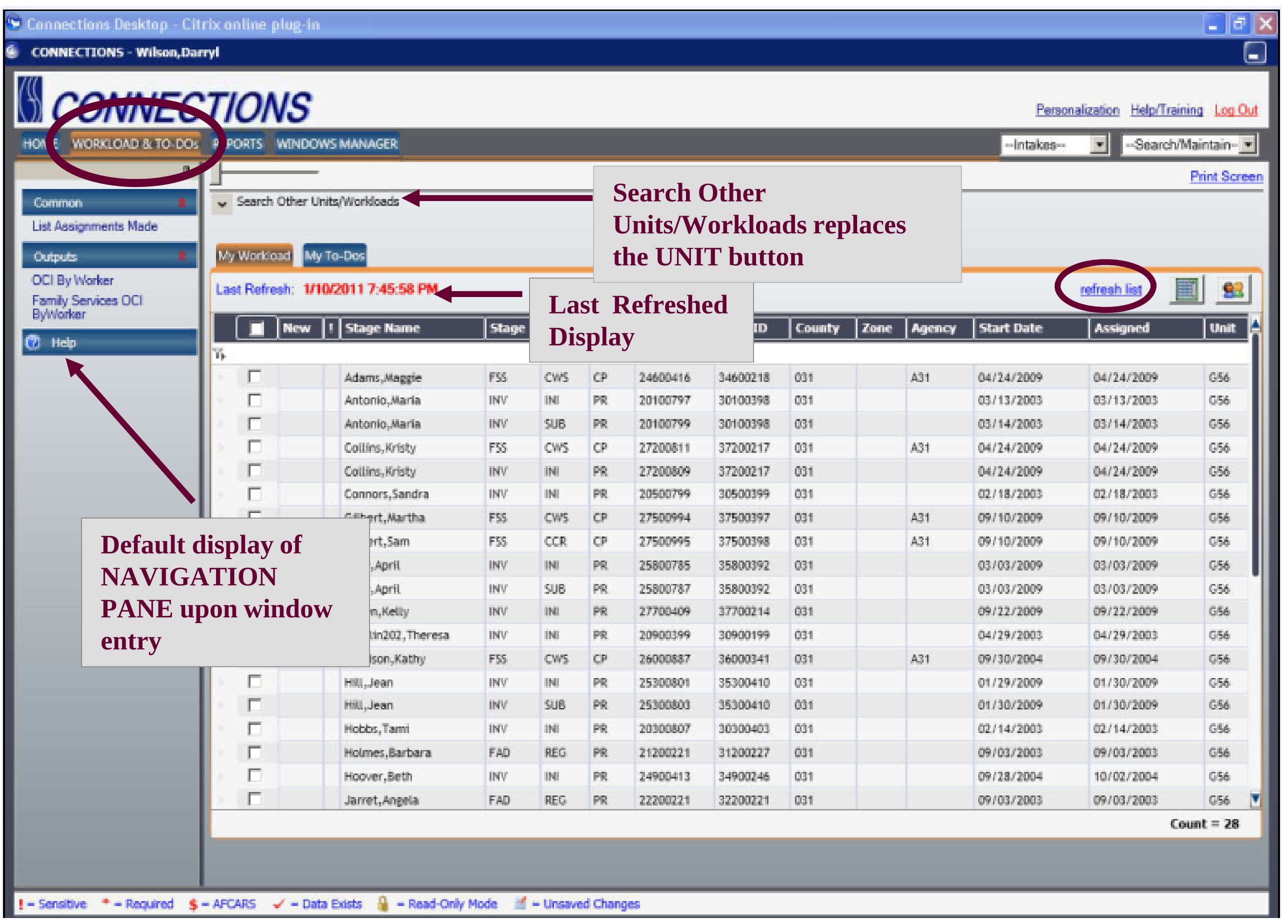
The OCFS Mission Statement will always be displayed across the bottom of the **HOME** tab.



WORKLOAD & TO-DOs Tab

The **WORKLOAD & TO-DOs** tab replaces the **TO-DO**, **WORK** and **UNIT** icons on the former toolbar. When accessing this tab, the **NAVIGATION PANE** initially displays the **Common**, **Outputs** and **Help** sections**.** The links that display in the **Common** section and initially display in the **Outputs** section are applicable to all stages.

When a worker has Unit Summary access, the Search Other Units/Workloads section displays in the top portion of the work area. Below that are tabs for **My Workload** and **My To-Dos.** The **My Workload** tab replaces the **Assigned Workload**. The case/stage information presented in the grid has not changed. When **My Workload** is active, the date and time the window was last updated (refreshed) from the CONNECTIONS database is displayed in red below the tabs. On the right side of the window is the refresh list link which is used to manually update the workload display at any time. Display options for **Stage** or **Person View** appear next to the refresh list link.



Personalization

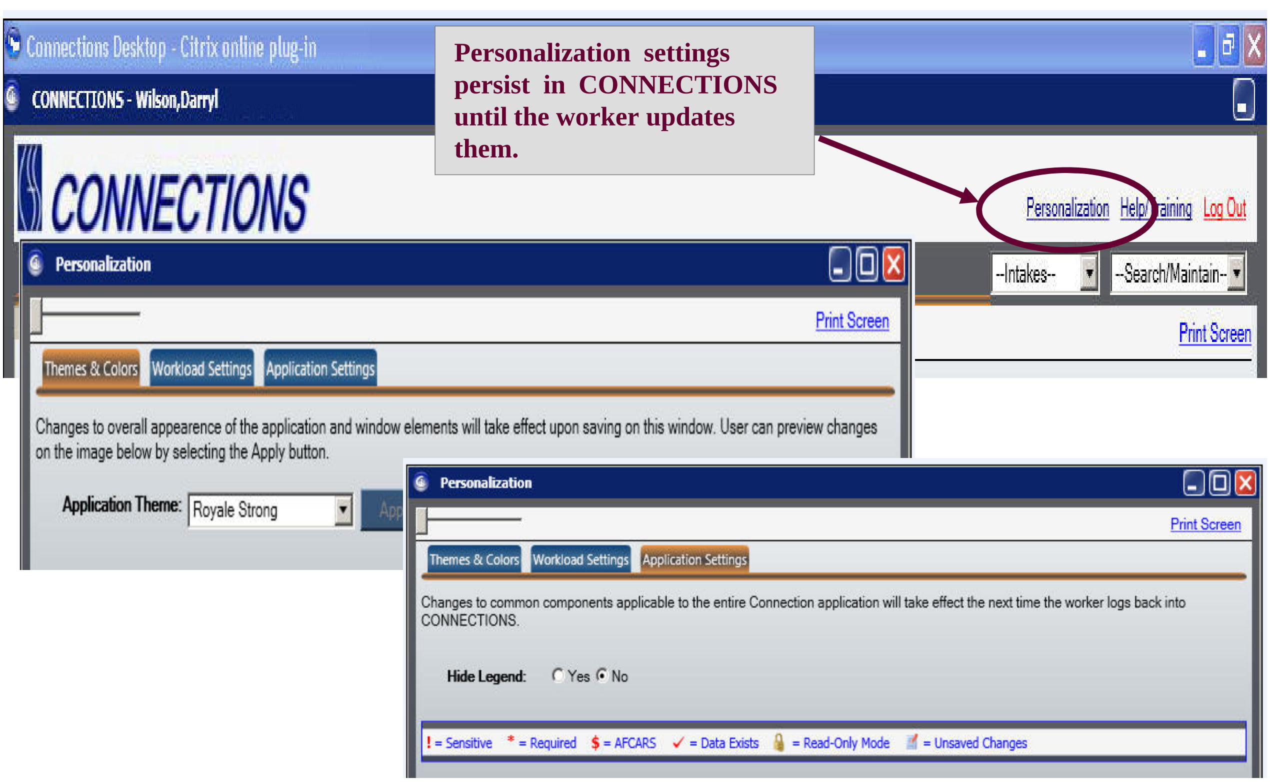
The Personalization link accesses a window used to customize the display or the workload and some other window elements. Personalized settings apply only to a worker's own workload, not to other workloads that worker may access. Changes made through Personalization will remain in effect from session to session until the worker changes them.

The **Personalization** window contains three tabs: **Themes and Colors**, **Workload Settings** and **Application Settings**.

Themes and Colors sets a visual style for the overall application. Changes made in **Themes and Colors** are effective upon saving the window.

Workload Settings allows for customization of the columns on the **My Workload** tab**.** Certain columns can be hidden and column order can be changed as desired. A worker can also choose to have either the **My Workload** or **My To Dos** tab as their default. Changes in **Workload Settings** take effect after the next log-in.

The **Application Settings** tab allows the new CONNECTIONS legend to be hidden from view Changes in **Application Settings** take effect after the next log-in..

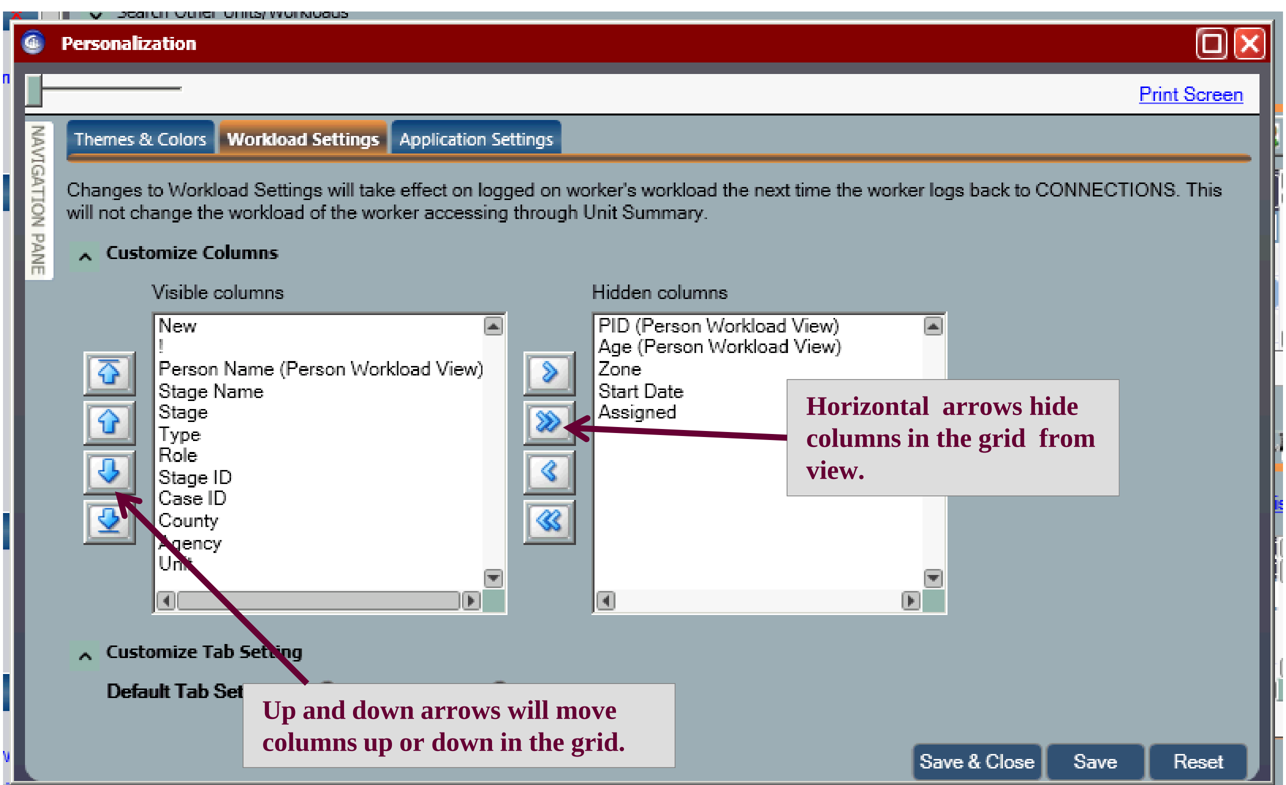


Personalization
Workload Settings

The **Workload Settings** tab has two sections, **Customize Columns** and **Customize Tab Setting**. Each section can be expanded or collapsed. The **Customize Columns** section is used to remove workload grid columns from view and change workload grid column order.

The **Workload Settings** window displays the **Visible columns** list box which includes a list of columns on the worker's workload. Highlighting a column name and selecting the up and down arrows modifies the order in which the column displays on the workload grid. Using the horizontal arrows allow workers to hide columns in the grid. The New, Stage Name, Sensitive Case and Person Name columns can be moved, but not be hidden. The multi-select checkbox column does not display in the **Visible columns** grid but can be dragged and moved out of view on the workload itself.

The **Customize Tab Settings** section allows the worker to set a default view when the **WORKLOAD & TO DOs** tab is opened from the toolbar. The default can be to either **My Workload** or **My To-Dos**. This option may be useful for workers with larger workloads who prioritize work through their To Do's, or for supervisory staff.



Workload:

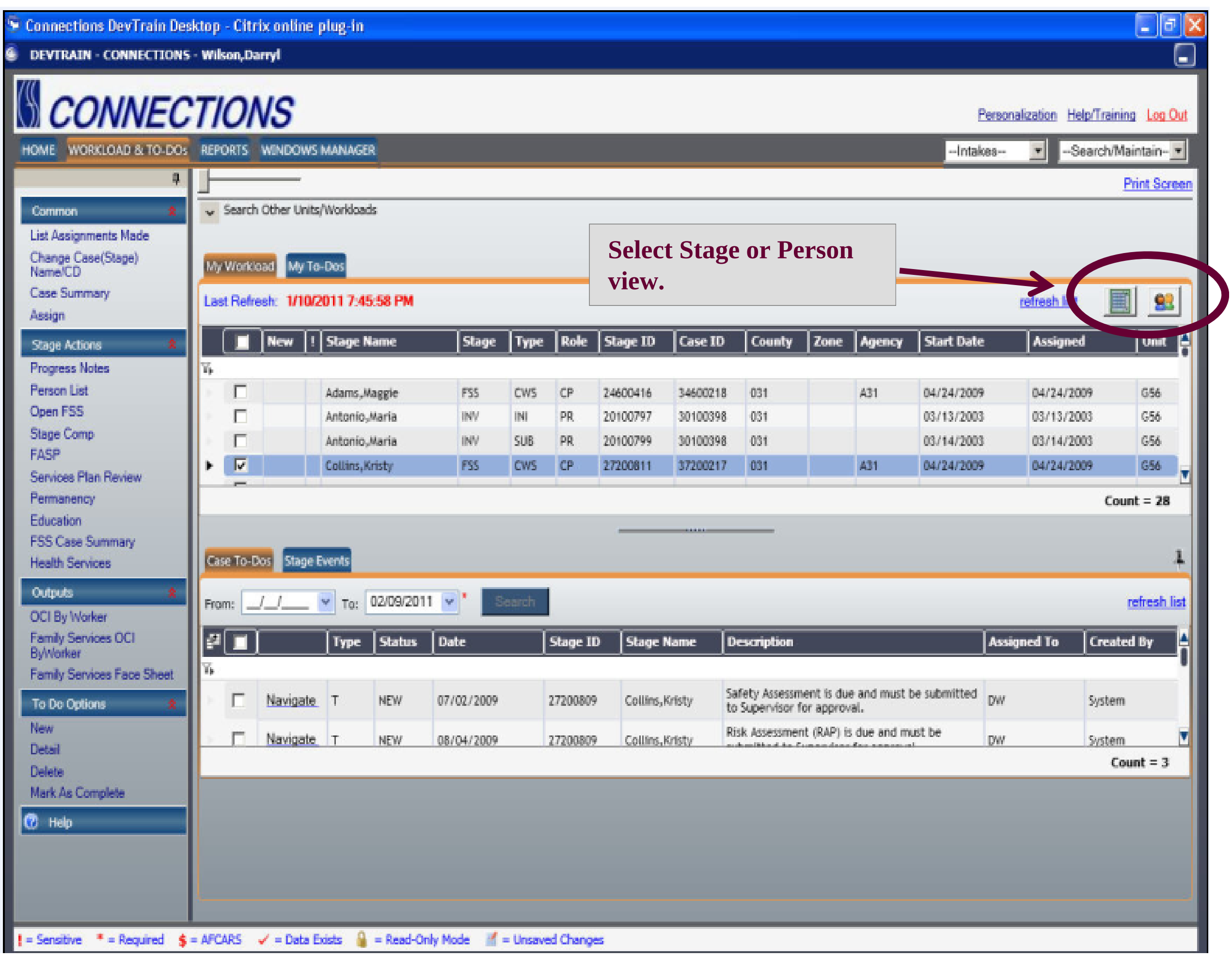
Stage or Person View

A workload can be displayed in **Stage** view or **Person** view. The **Stage** view resembles the current **Assigned Workload**. The **Person** view displays the workload listing all the people named in every stage.

In addition to Personalization, it is possible to temporarily alter the presentation of data on these grids by:

•Clicking the column header and dragging it to the desired location.
•Filtering to display selected values only.
•Unpinning the **NAVIGATION PANE** to increase the size of the work area.

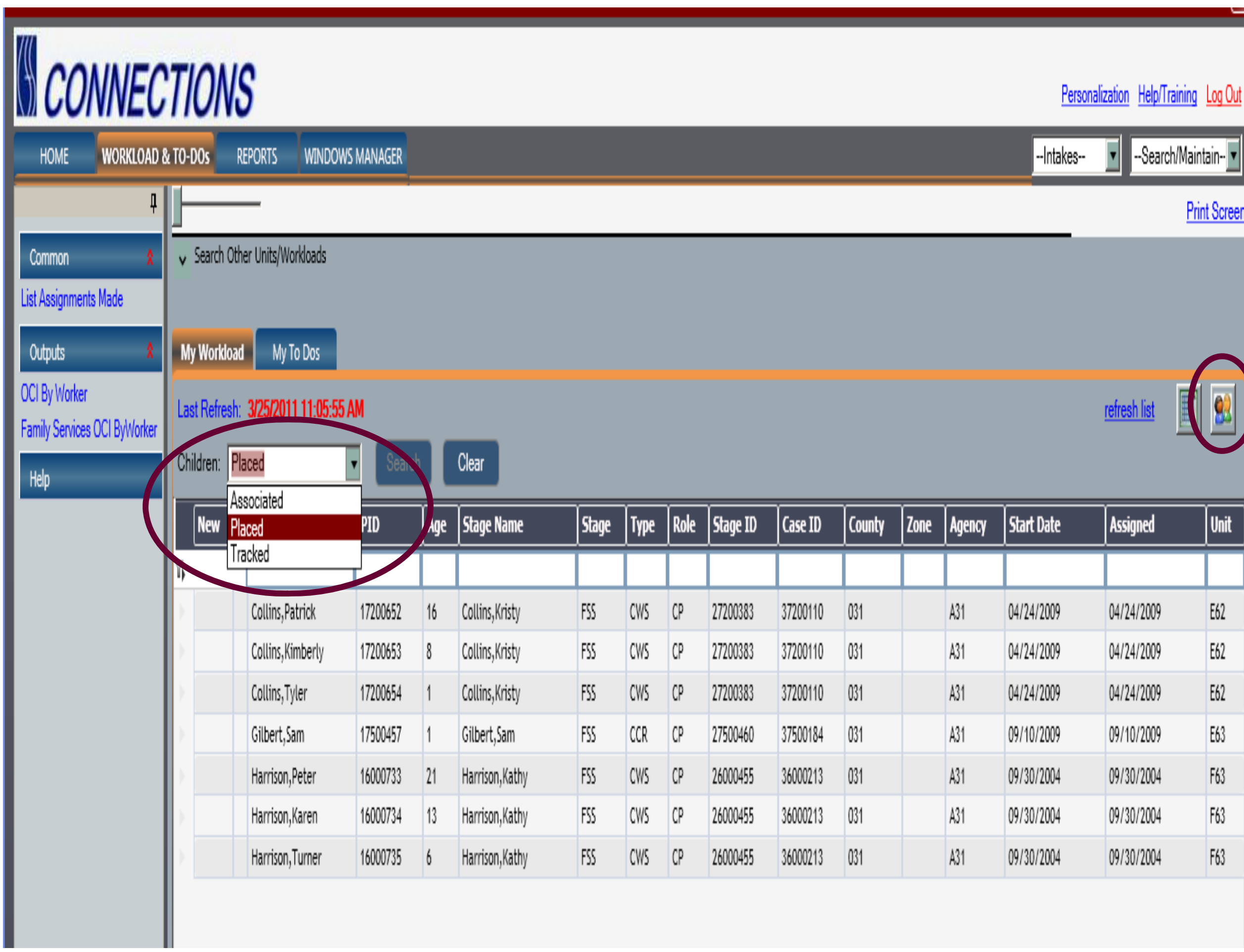
The grid columns on transformed windows can not be locked or frozen, and columns can not be hidden based on county specific preferences.



Workload

Person View

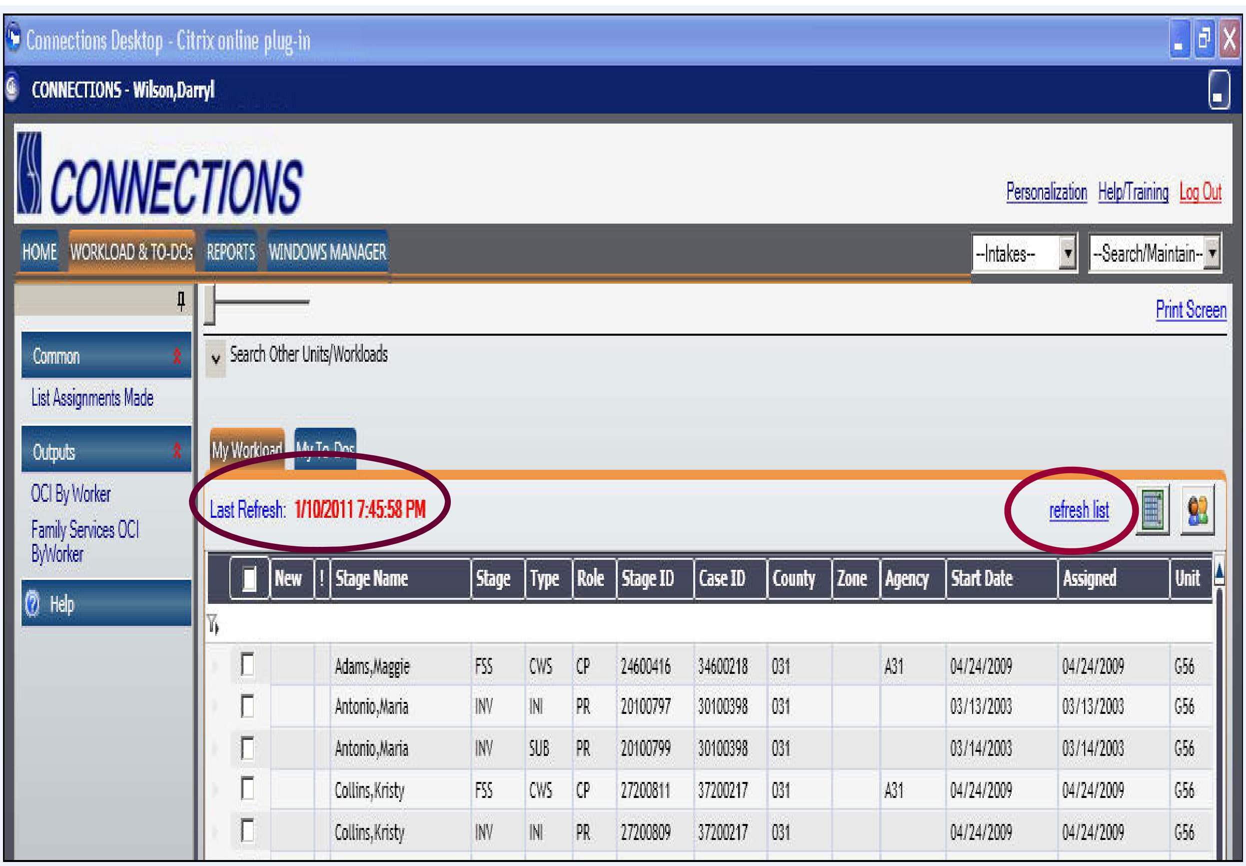
The **Person** view displays all the people named in every stage on the workload. The **Person** view includes the option search the grid to display a list of children based on three criteria: **Associated**, **Placed** or **Tracked** children.



My Workload

Refresh List

When the workload window is first accessed it displays up-to-date information from the CONNECTIONS database. The date and time that the window was refreshed is displayed in red above the grid. The **WORKLOAD & TO-DOs** tab automatically refreshes only under limited conditions. It remains best practice to refresh the data on the workload periodically during the day (to check for new assignments or To-Dos for example) by clicking on the <u>refresh list</u> link.



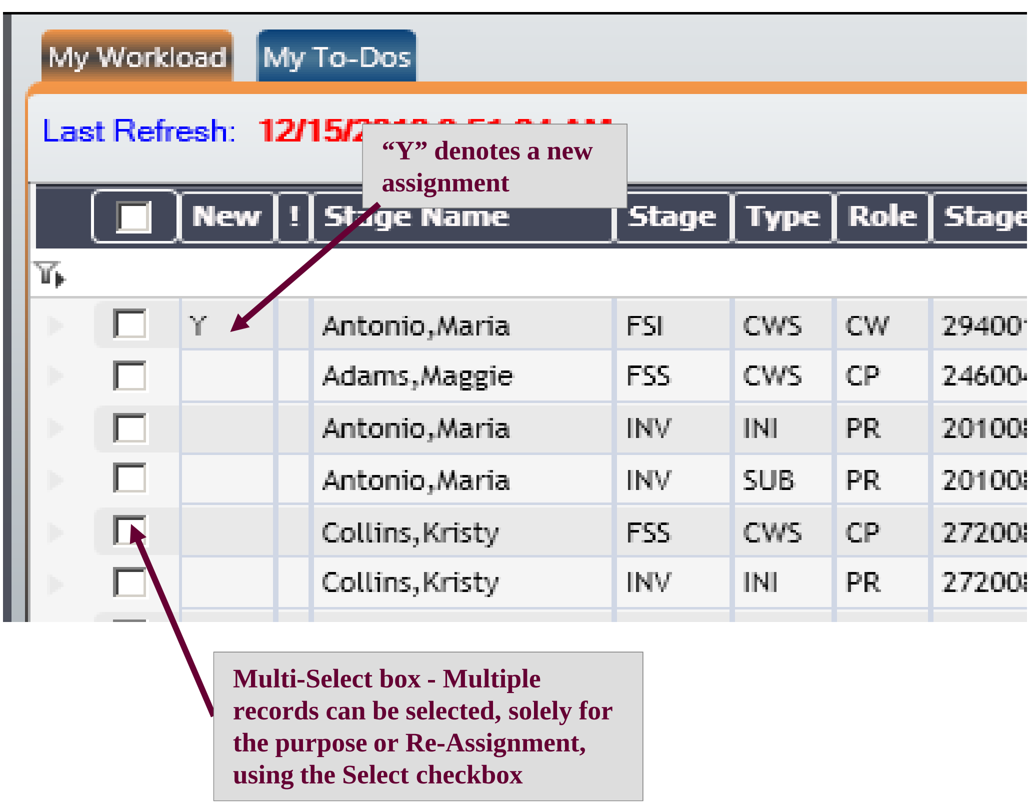
My Workload

Selecting Stages

A new checkbox appears to the left of each row on the workload that is used to select one or multiple records for the purpose of making block assignments. The checkbox on the column header can be used to check and uncheck all the records on the workload grid.

An individual stage on the workload can be selected (highlighted) by single clicking anywhere on the row in the grid. When a new row is selected, the previous row is automatically deselected. When a stage is selected, links that are associated with stage tasks display in the **NAVIGATION PANE** Therefore, double clicking on the row of the workload is no longer be used to open a process or window.

A “Y” in the **New** column on the workload identifies newly assigned stages. After accessing a new assignment, the “Y” indicator is removed by the system when the workload is next refreshed. New stages are no longer grayed.



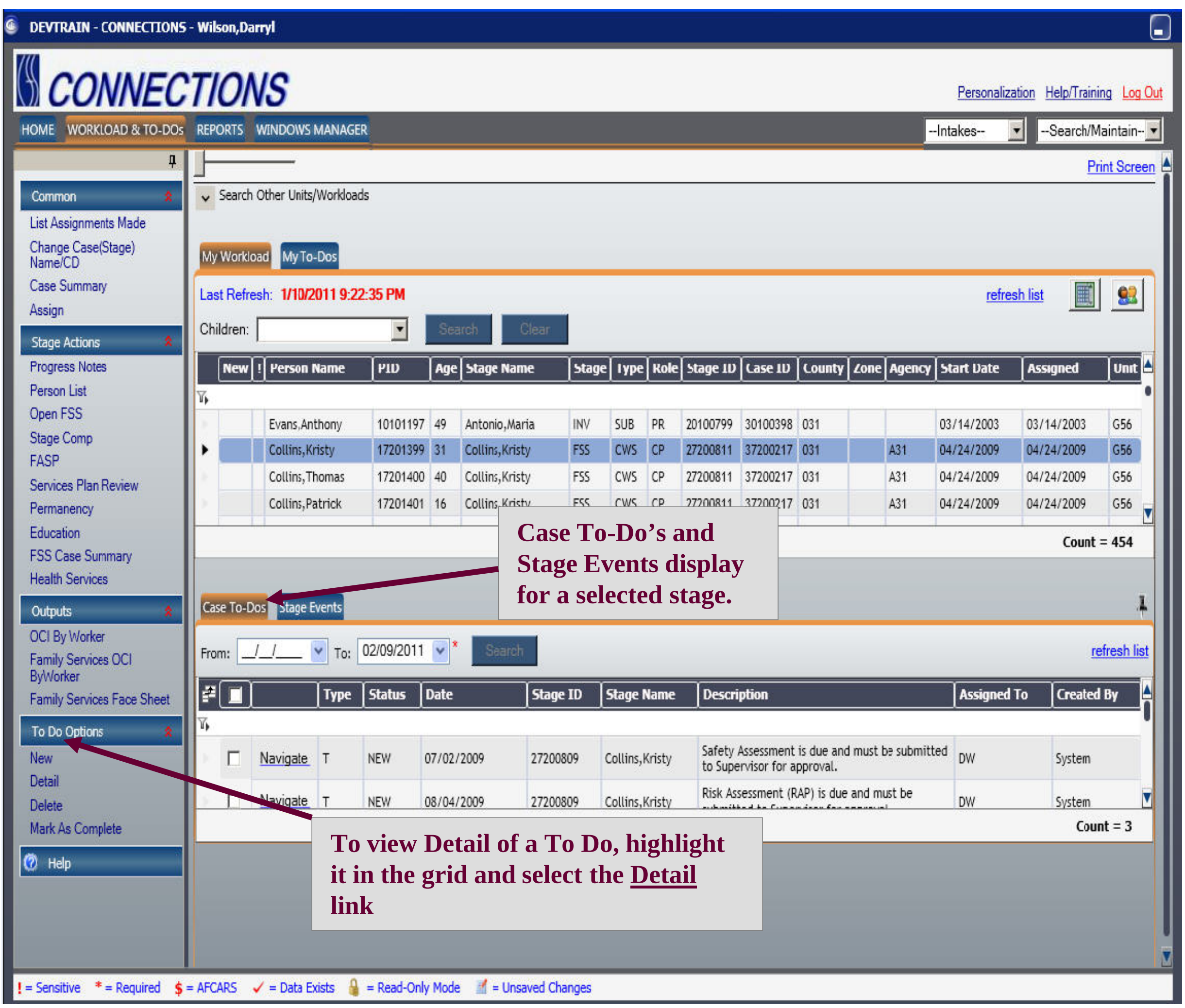
My Workload

Viewing Stage Specific Information

After a stage on the workload is highlighted, additional links display on the **NAVIGATION PANE** and the **Case To-Dos** and **Stage Events** sub-tabs appear below the workload for the selected stage.

The **Case To-Dos** tab is in focus when a stage is selected. Both To-Do's and Events have a search capability that allows a display within a range of identified dates.

Once a To-Do is selected, clicking on the Detail link in the **NAVIGATION PANE** gives additional information regarding the required action. Clicking the Navigate link in the selected To Do will display the appropriate window needed to complete the work. Event detail can be accessed by highlighting the Event on the grid and selecting the Detail link on the **NAVIGATION PANE**.

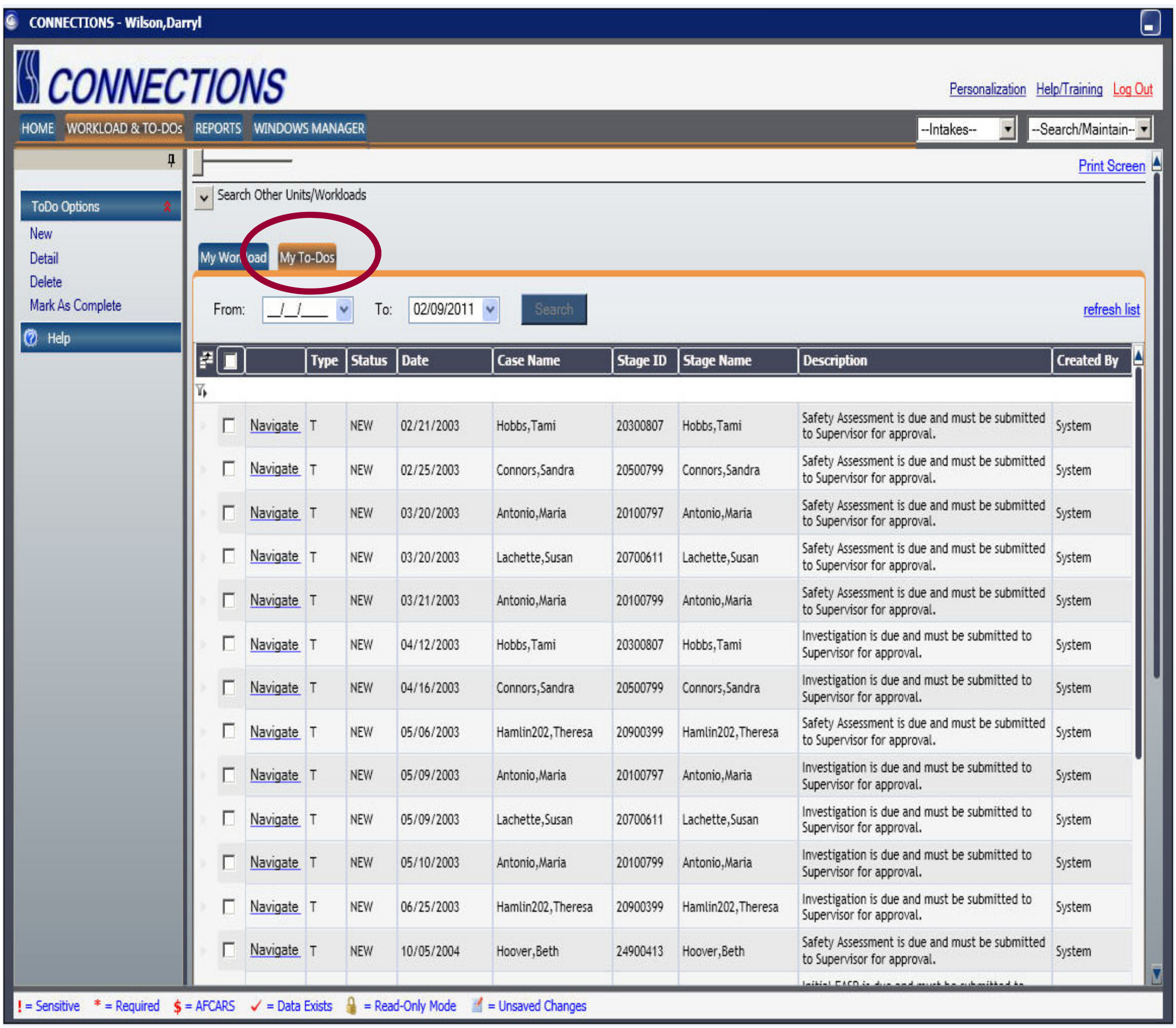


My To-Dos

The **My To-Do's** tab displays a complete list of To-Dos assigned to a particular workload. By using this list, workers can view all of their current To-Do's across cases and stages. This access is the same as clicking as on the TO-DO Icon on the former CONNECTIONS toolbar. A search capacity allows searching for To-Do's within a particular date range.

Additional paths to access To-Do's from the Case List and Case Summary are also supported. Accessing To-Dos from Case Summary will display a stage specific list.

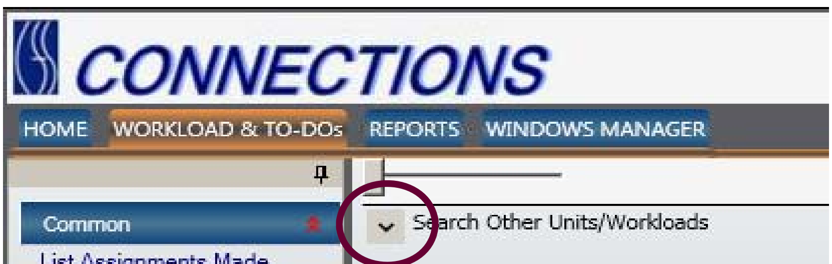
My To-Dos are refreshed every time the **WORKLOAD & TO DOs** tab is selected, or by clicking on the <u>refresh list </u>link on the window.

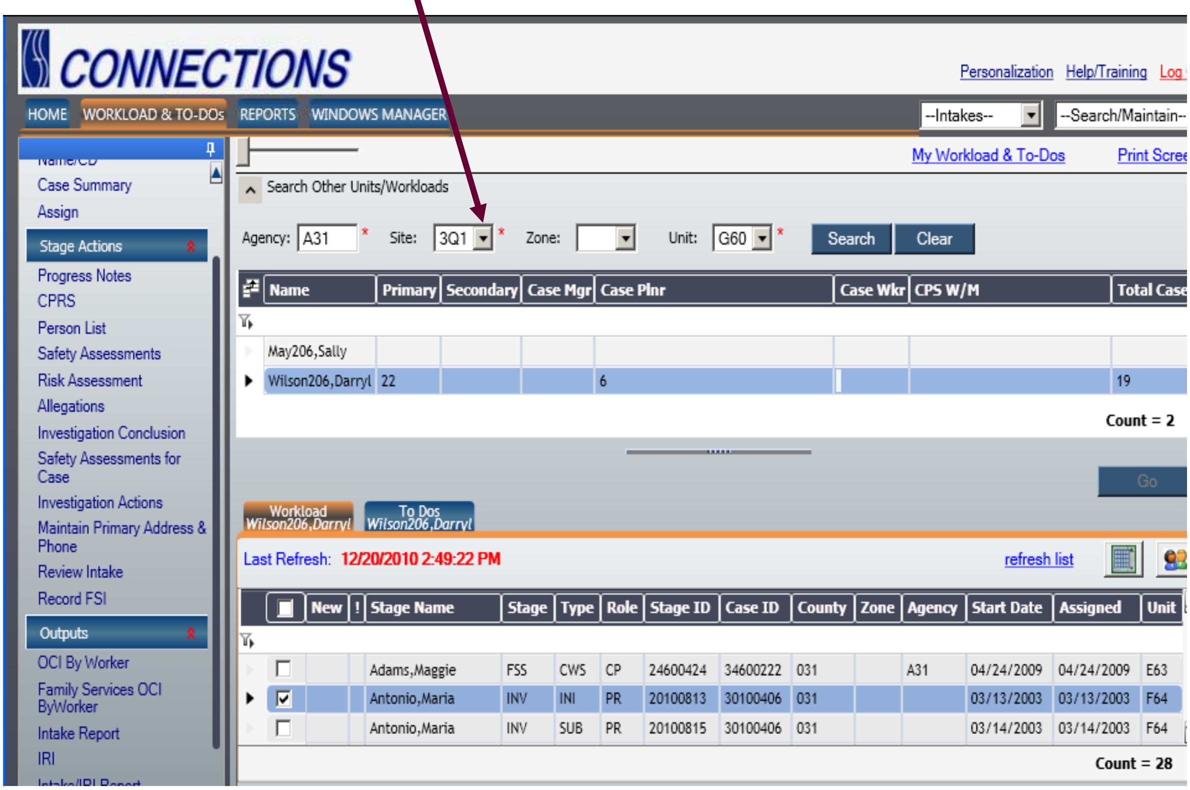


	Type	Status	Date	Case Name	Stage ID	Stage Name	Description	Created By
Navigate	T	NEW	02/21/2003	Hobbs,Tami	20300807	Hobbs,Tami	Safety Assessment is due and must be submitted to Supervisor for approval.	System
Navigate	T	NEW	02/25/2003	Connors,Sandra	20500799	Connors,Sandra	Safety Assessment is due and must be submitted to Supervisor for approval.	System
Navigate	T	NEW	03/20/2003	Antonio,Maria	20100797	Antonio,Maria	Safety Assessment is due and must be submitted to Supervisor for approval.	System
Navigate	T	NEW	03/20/2003	Lachette,Susan	20700611	Lachette,Susan	Safety Assessment is due and must be submitted to Supervisor for approval.	System
Navigate	T	NEW	03/21/2003	Antonio,Maria	20100799	Antonio,Maria	Safety Assessment is due and must be submitted to Supervisor for approval.	System
Navigate	T	NEW	04/12/2003	Hobbs,Tami	20300807	Hobbs,Tami	Investigation is due and must be submitted to Supervisor for approval.	System
Navigate	T	NEW	04/16/2003	Connors,Sandra	20500799	Connors,Sandra	Investigation is due and must be submitted to Supervisor for approval.	System
Navigate	T	NEW	05/06/2003	Hamlin202,Theresa	20900399	Hamlin202,Theresa	Safety Assessment is due and must be submitted to Supervisor for approval.	System
Navigate	T	NEW	05/09/2003	Antonio,Maria	20100797	Antonio,Maria	Investigation is due and must be submitted to Supervisor for approval.	System
Navigate	T	NEW	05/09/2003	Lachette,Susan	20700611	Lachette,Susan	Investigation is due and must be submitted to Supervisor for approval.	System
Navigate	T	NEW	05/10/2003	Antonio,Maria	20100799	Antonio,Maria	Investigation is due and must be submitted to Supervisor for approval.	System
Navigate	T	NEW	06/25/2003	Hamlin202,Theresa	20900399	Hamlin202,Theresa	Investigation is due and must be submitted to Supervisor for approval.	System
Navigate	T	NEW	10/05/2004	Hoover,Beth	24900413	Hoover,Beth	Safety Assessment is due and must be submitted to Supervisor for approval.	System

Search Other Units/Workloads

The **Search Other Units/Workloads** section on the **WORKLOAD & TO DOs** tab provides access to workloads and units other than the worker's own. Please note that this option continues to be available only when the logged-on worker has security to access other workloads, in other words, only if the **UNIT** icon on the former toolbar was available. Clicking on the down arrow expands the section to display fields for search criteria including **Agency, Site, Zone** and **Unit**. When accessed, the search criteria fields displays values for the logged-on worker's In Assigned unit. Additional **Sites, Zones** and **Units** can be accessed from the drop-downs that contain the values affiliated with the logged-on worker's district or agency. Zone is used for primarily NYC cases.



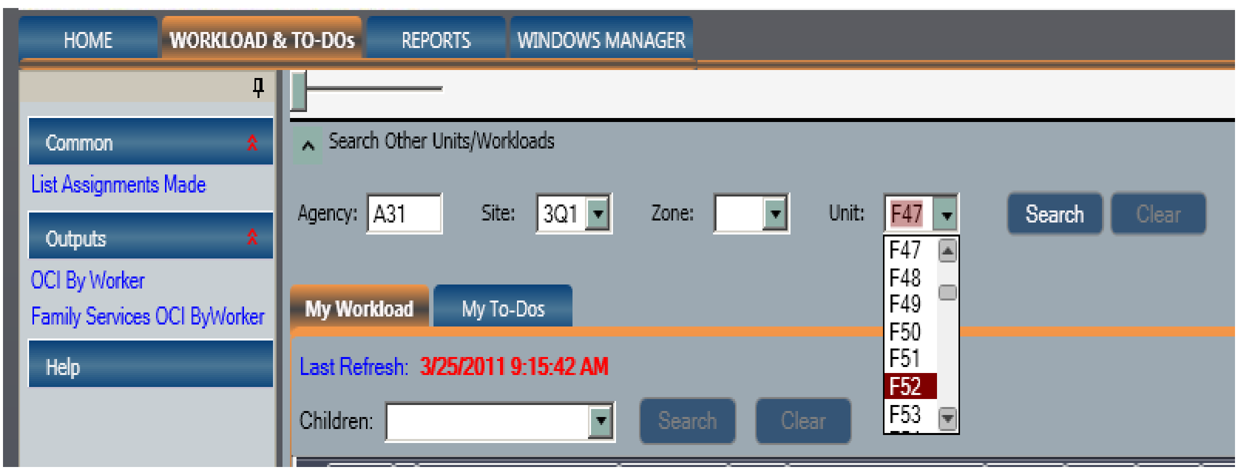


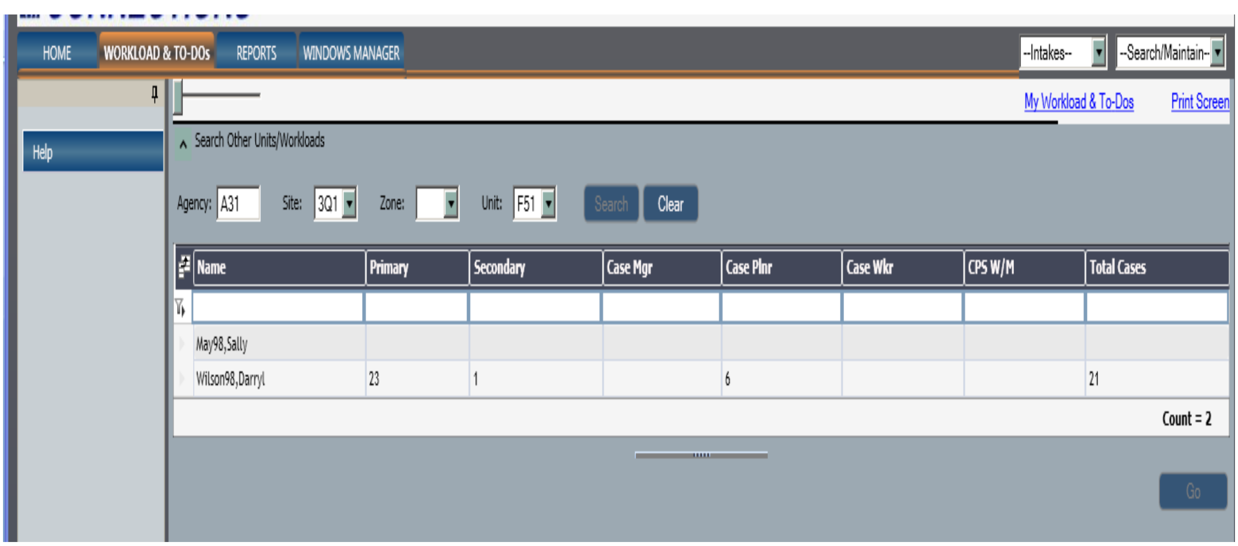
Search Other Units/Workloads

Accessing Other Units

To search for another unit, click on the drop-downs in each area. The Site field drop-down displays available sites corresponding to the logged-on worker's district/agency. The Unit field drop-down displays all the available units for the selected site. When both the Site and Unit are selected, the **Search** button is enabled.

As soon as the default values in Unit and Site are changed, the **Clear** button is enabled. If **Clear** is selected, it will reset all fields to the original defaults. If a search has already been performed when **Clear** is selected, any assignments and To-Dos that are already displayed in the grid are also cleared.



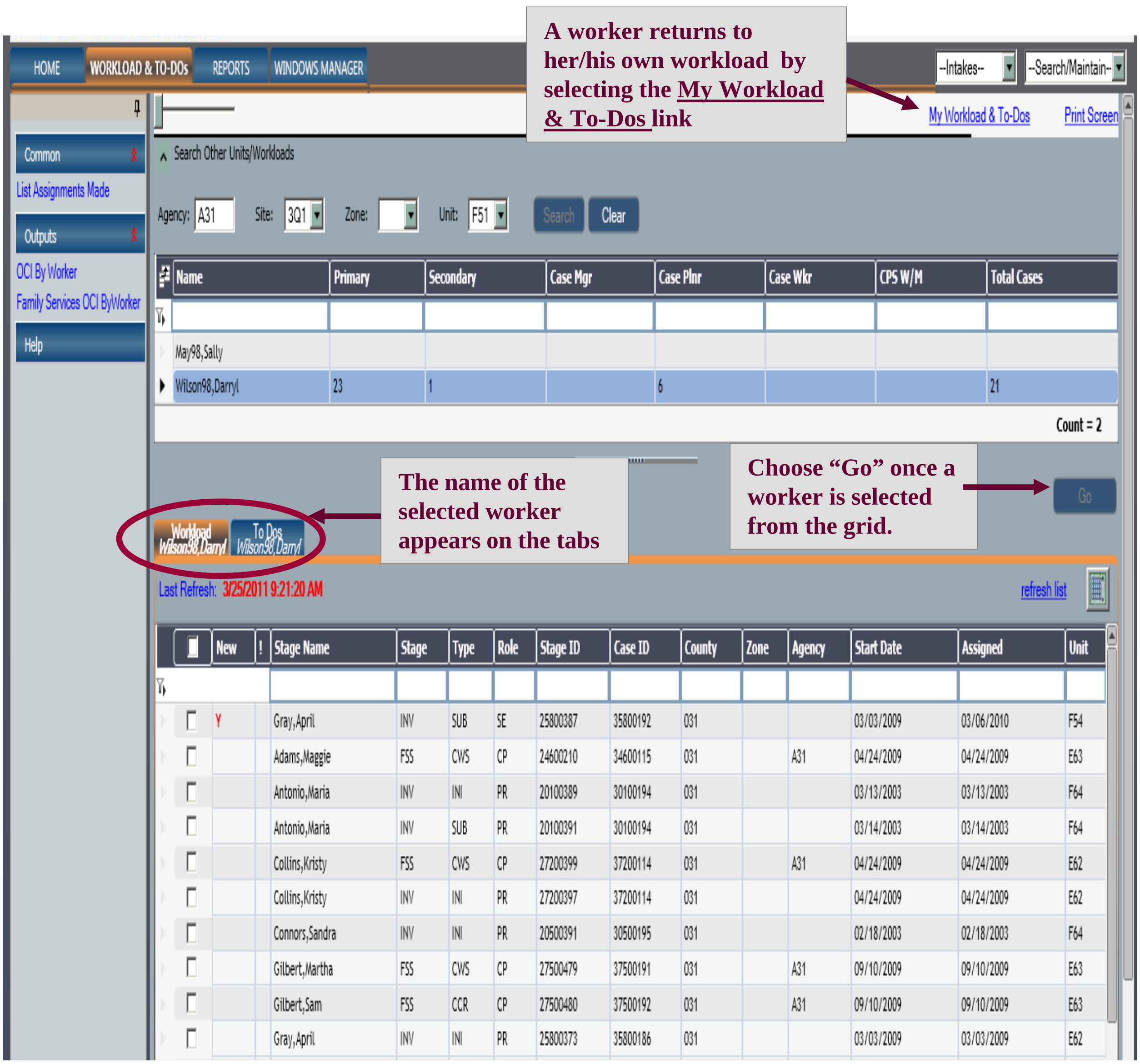


Search Other Units/Workloads

Accessing Other Units (Cont'd)

After searching, a grid displays with all the workers and their assignments from the selected unit. When a worker is selected from the grid, the **Go** button is enabled and must be selected to access that worker's assigned stages and To-Dos. The tab display will include the worker's name.

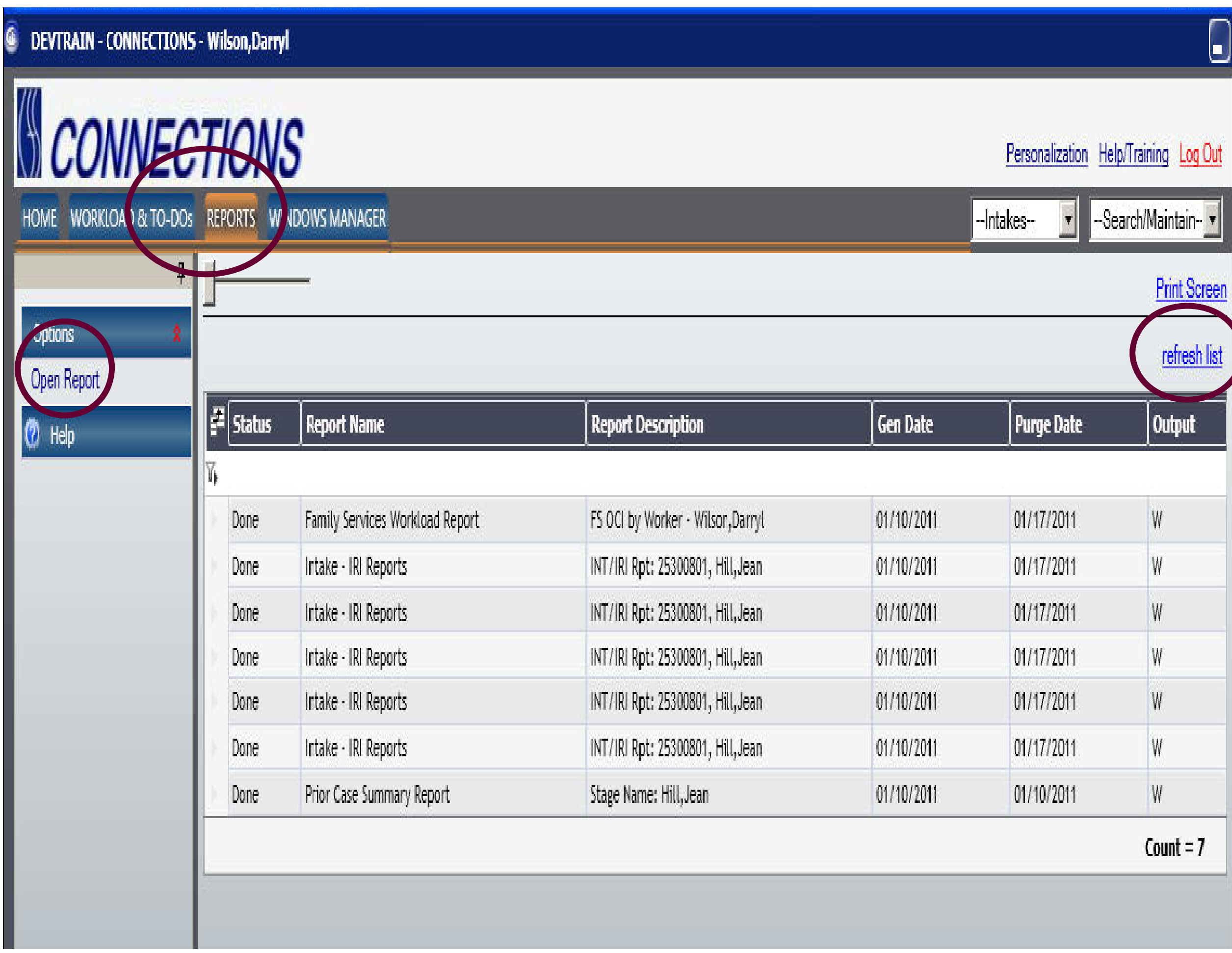
Selecting the <u>My Workload & To-Dos</u> link returns the view to a refreshed view of the worker's own workload and To-Dos.



REPORTS Tab

Reports are launched from various windows and then retrieved from the **REPORTS** tab on the new CONNECTIONS toolbar.

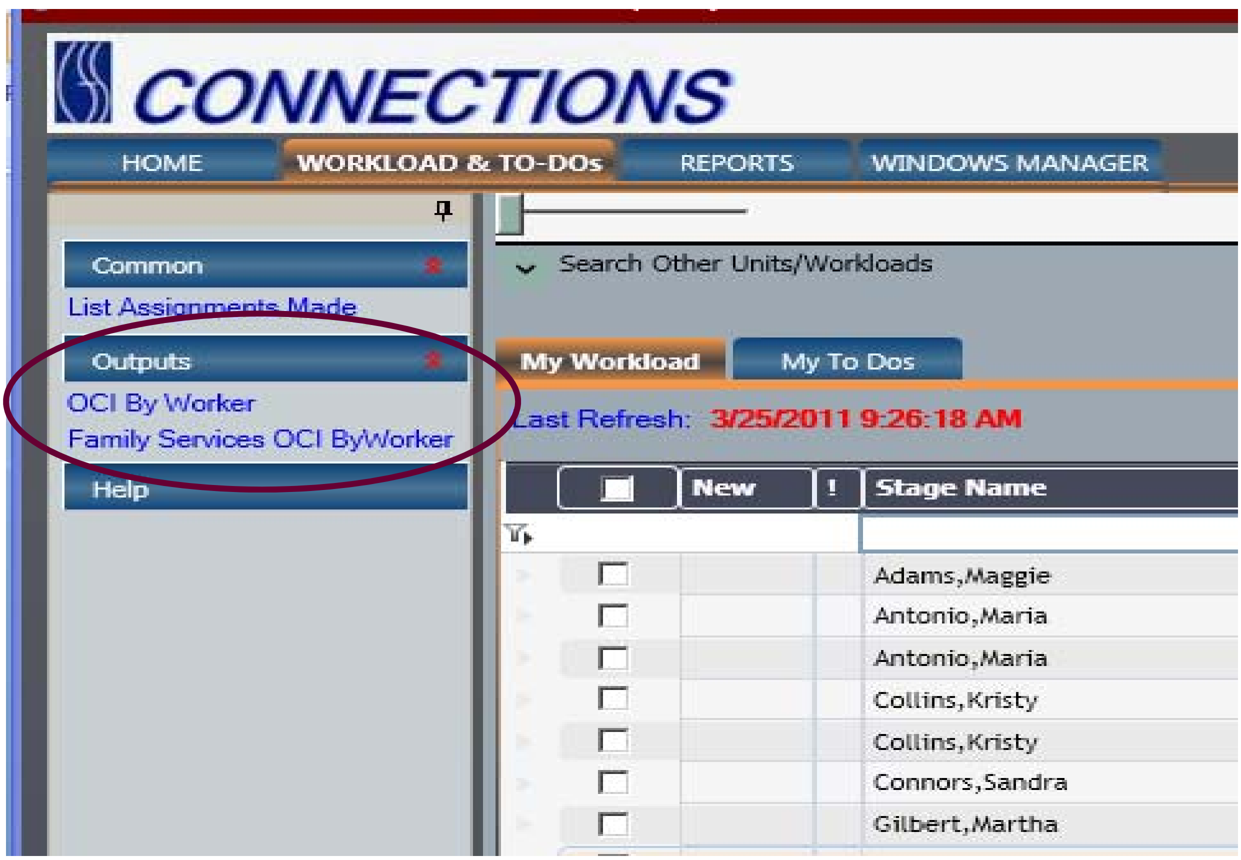
The **REPORTS** tab opens a window with a grid listing launched report(s). A report can be opened by highlighting it in the grid and clicking on the Open Report link on the **NAVIGATION PANE**. The refresh list link on the window allows the worker to manually update the Report List grid.



Outputs

Outputs are generated from the **NAVIGATION PANE** on specific windows. Outputs are generated using the **Output Launch** Window. The window is opened by clicking on the Output link on the **NAVIGATION PANE**.

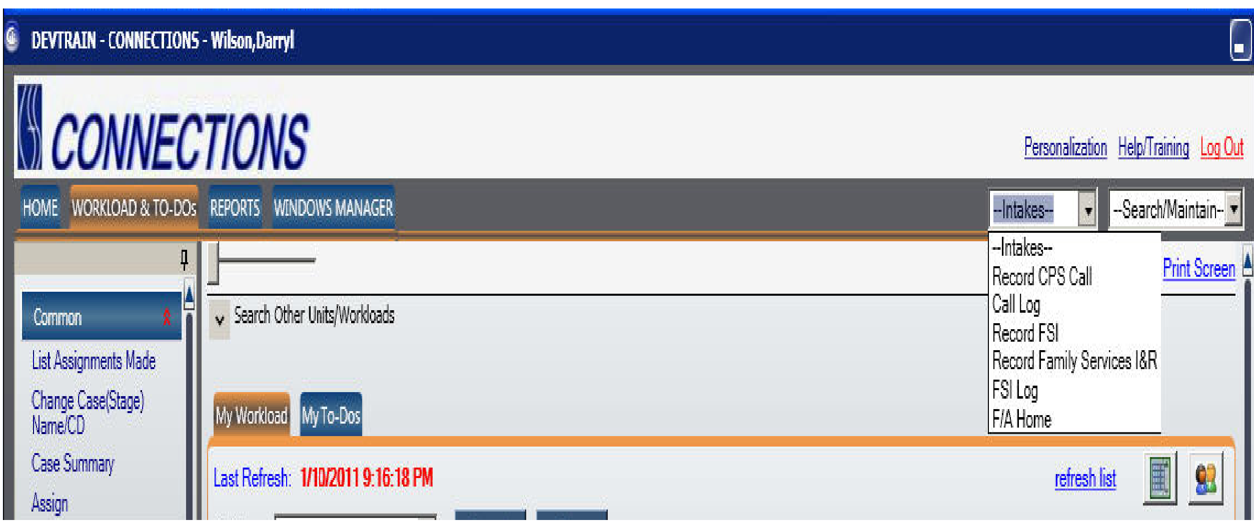
As always, the security of the logged-on worker, and the navigational path taken by the worker, determines whether an output can be produced and/or whether the user can open an output that was previously launched.



Intakes Drop-Down Menu

All Intake functions are now accessed via the **Intakes** drop-down menu. This includes functions that are used to record and transmit CPS Intakes, record and track Family Services Intakes, and develop Foster and Adoptive Homes.

The windows used to process CPS Intakes and Foster and Adoptive Homes will have the new look and feel, but will have no change in functionality. FSI processing has not been modified at this time.



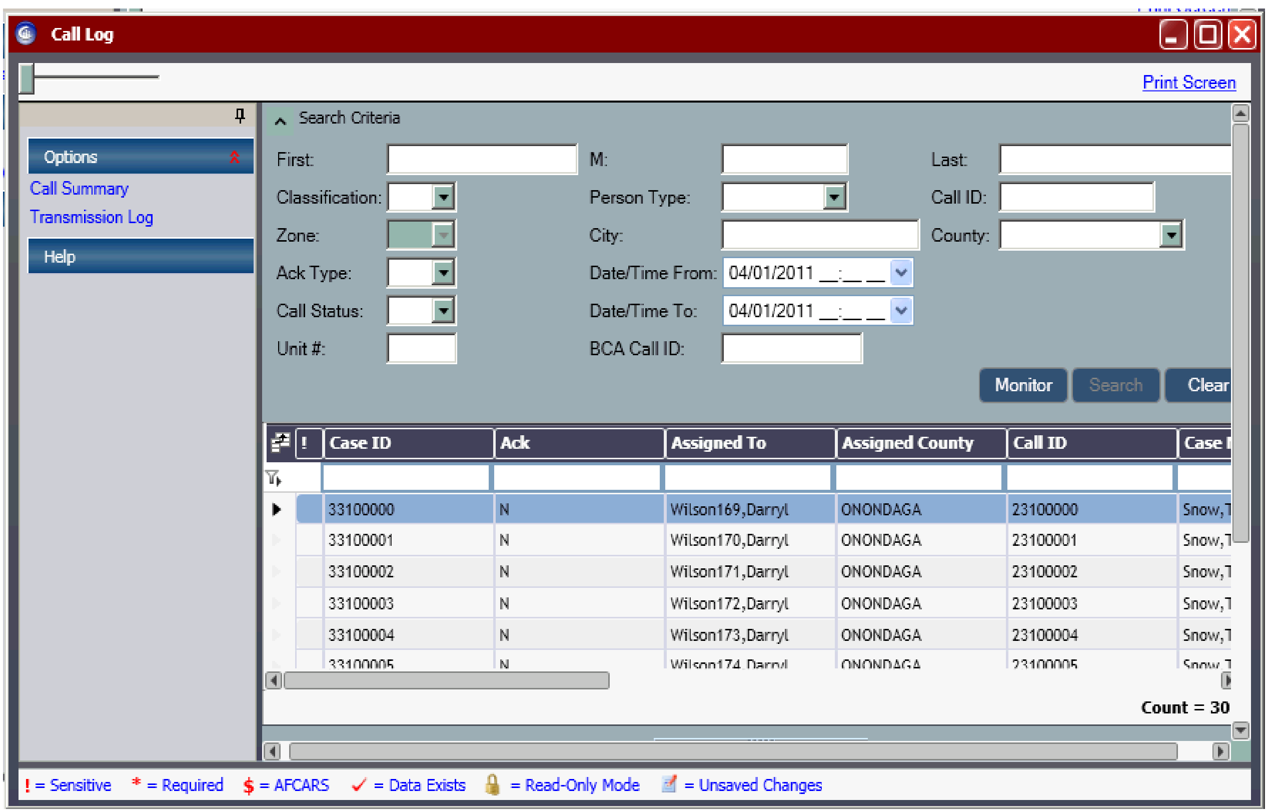
Intakes Drop-Down Menu

Call Log

The Call Log function on the **Intakes** drop-down menu is commonly used in the CPS Report transmission process.

The transformed **Call Log** window combines the Call Log search and the Call Log list on one window. Additional sections of the **Call Log** window display as needed.

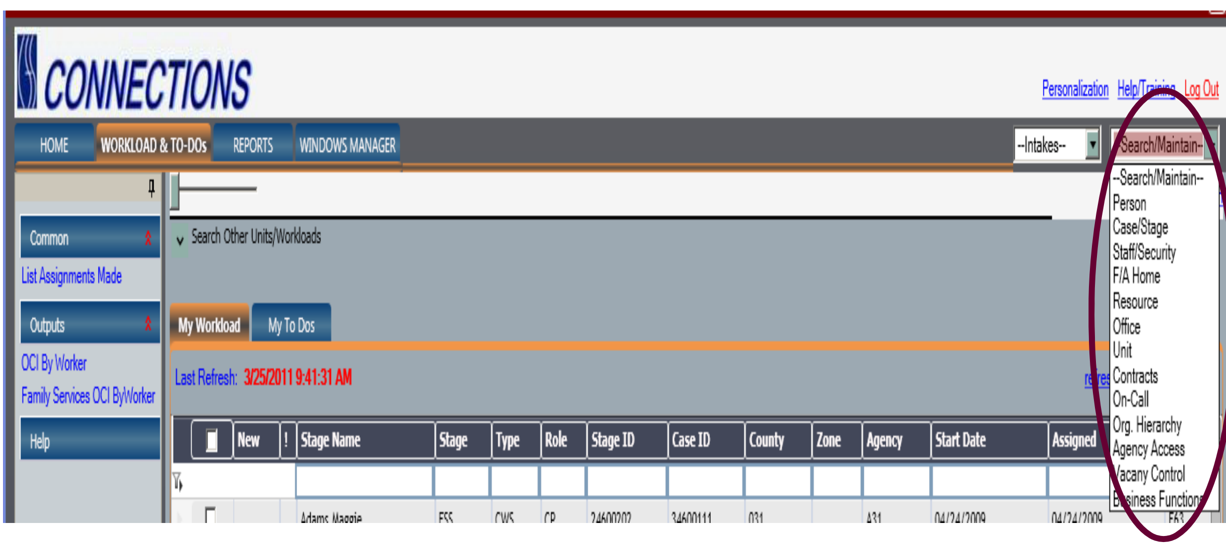
When the window is opened, the Call Log **Search Criteria** section, including the current date, is the default display. Time can be entered by the worker. No change has been made in the enabling of the **Monitor** and **Search** buttons or processes. The Call Log outputs can be printed from the link on the **NAVIGATION PANE**.



Search/Maintain Drop-Down Menu

All Search/Maintain functionality is now accessed through the new **Search/Maintain** drop-down menu. Options include: Person, Case/Stage, Staff/Security, F/A Home, Resource, etc.. A function only displays in the drop-down if the logged-on worker has the required security to access that function. When accessing a window through this path, the worker's assigned security determines whether windows open in Read Only or Update mode.

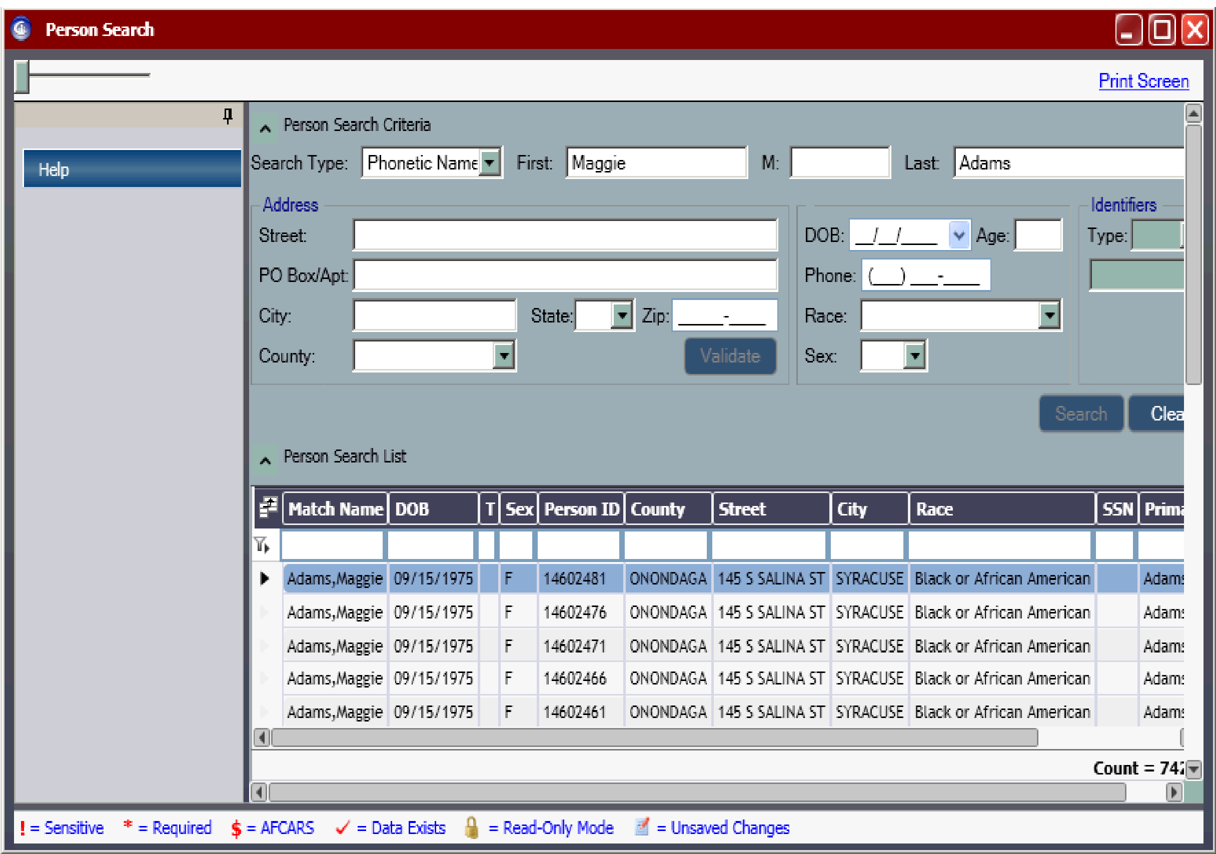
This Job Aid will highlight the changes made to the most commonly used search processes, Person, and Case Search. Changes that have been made in these transformed search windows can be applied to all transformed search functionality.



Person Search from Toolbar

The transformed Person Search window has 3 sections: **Person Search Criteria**, **Person Search List**, and Person Specific tabs. All existing Person Search business rules apply on the new search window. After the worker enters search criteria, the **Search** and **Clear** buttons are enabled. Clicking the **Search** button displays the search results. Selecting a person from the results grid displays the person specific tabs below the results.

Clicking the **Clear** button refreshes the window by clearing search criteria fields, results, and any other information on the window. The **NAVIGATION PANE** is blank for a toolbar person search as there are no actions to perform related to a stage.

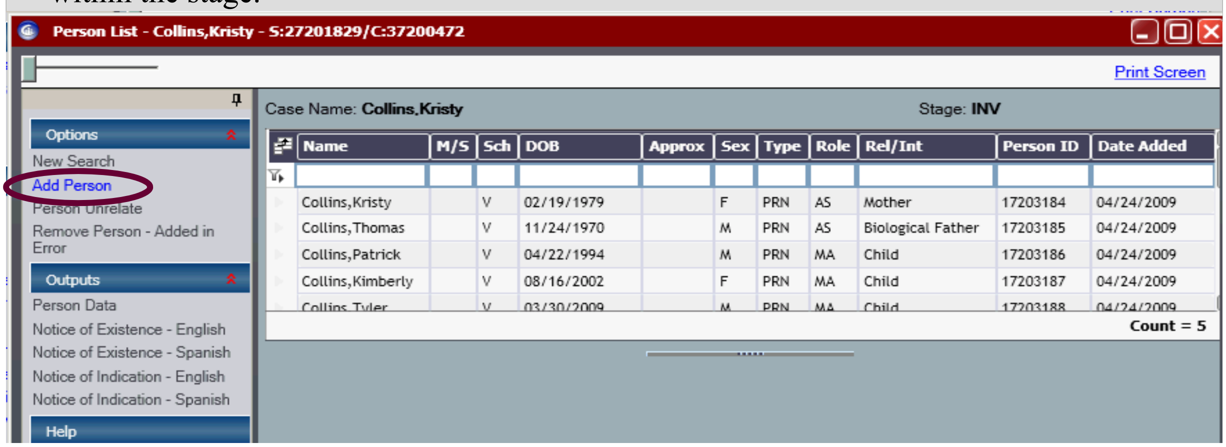


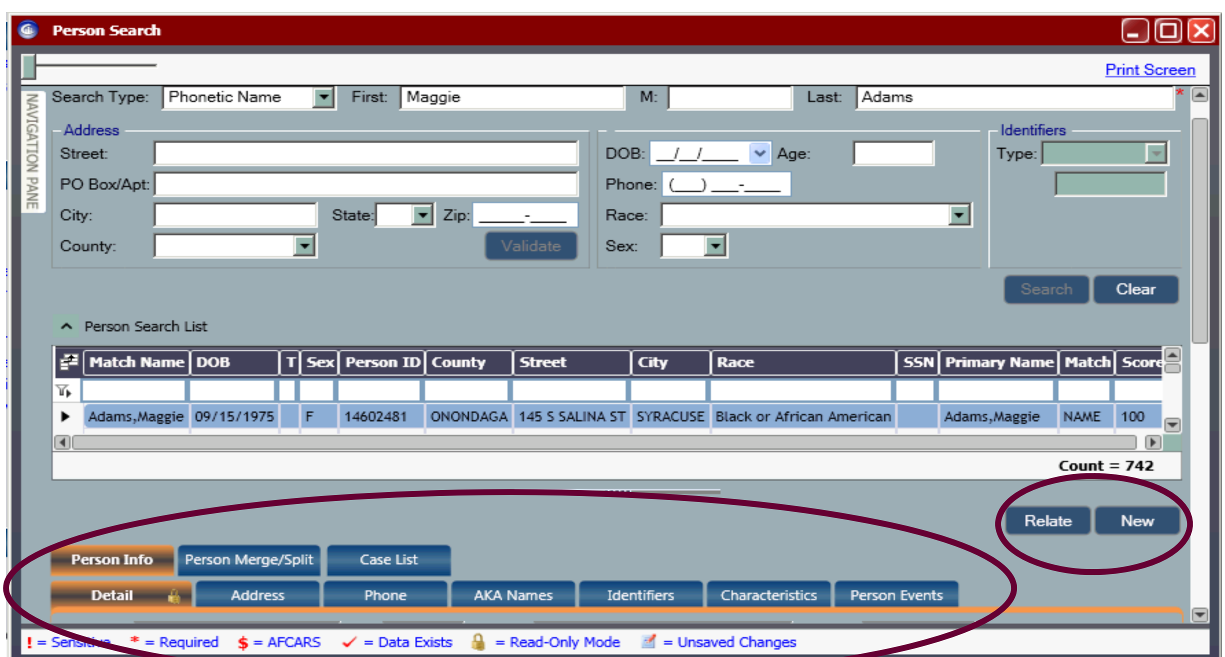
Person Search from Within a Stage

A person search may be conducted from within a stage by selecting an INV or FAD stage on the workload, clicking on the Person List link in the **NAVIGATION PANE** and, from the **Person List** window, clicking the Add Person link in **NAVIGATION PANE**. After entering search criteria, results are displayed in the grid below. Selecting a person displays tabs in which more detailed information can be viewed.

The **Relate** and **New** buttons display to allow for relating or adding the person to the stage.

After saving the Person Detail, all other person maintenance functions are performed within the stage.



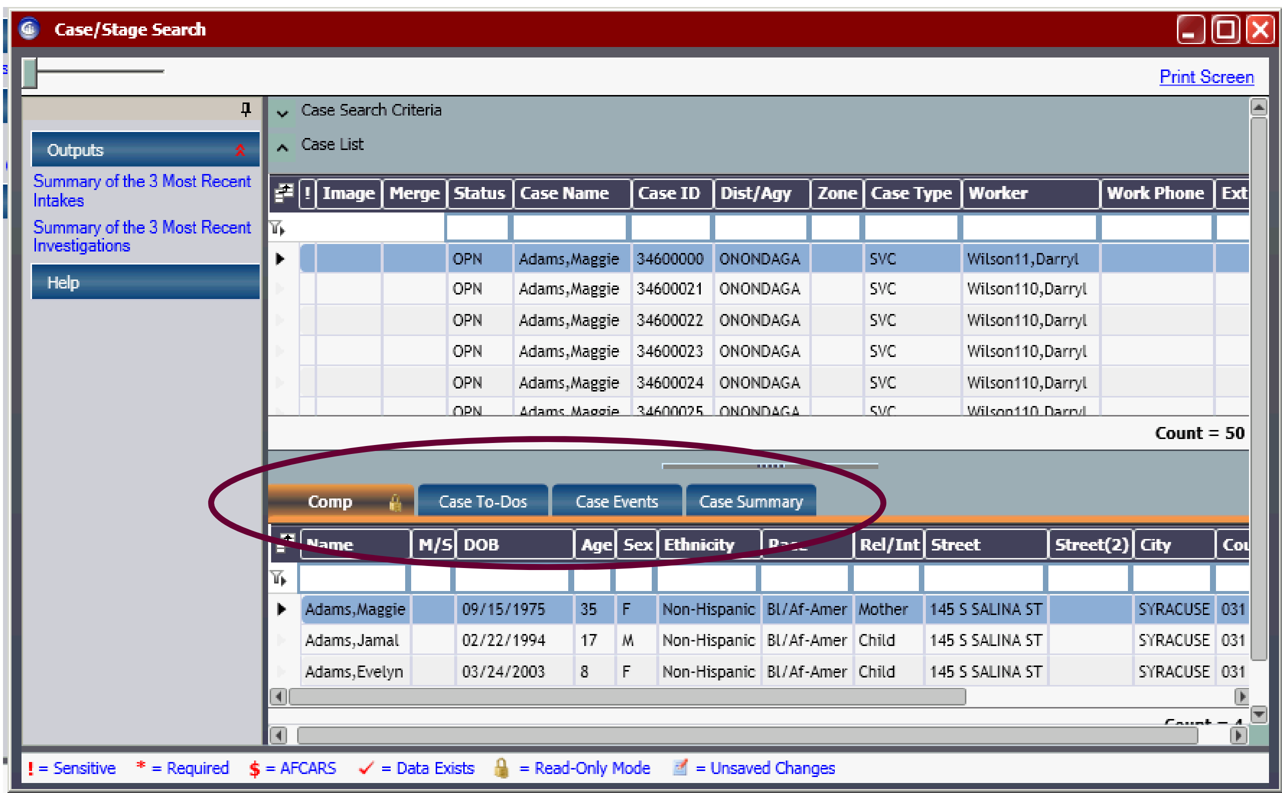


Case/Stage Search

Case/Stage Search is accessed from the **Search/Maintain** drop-down menu on the toolbar. All existing business rules that manage access to case information apply.

Modifications made in **Case/Stage Search** are consistent with those in **Person Search**. When the **Case/Stage Search** window is first accessed, only the **Case Search Criteria** section displays. After the worker enters search criteria, the **Search** and **Clear** buttons are enabled. Clicking the **Search** button displays the search results (**Case List**) and updates the **NAVIGATION PANE**. Selecting a case displays the tabs that contain details about the selected case.

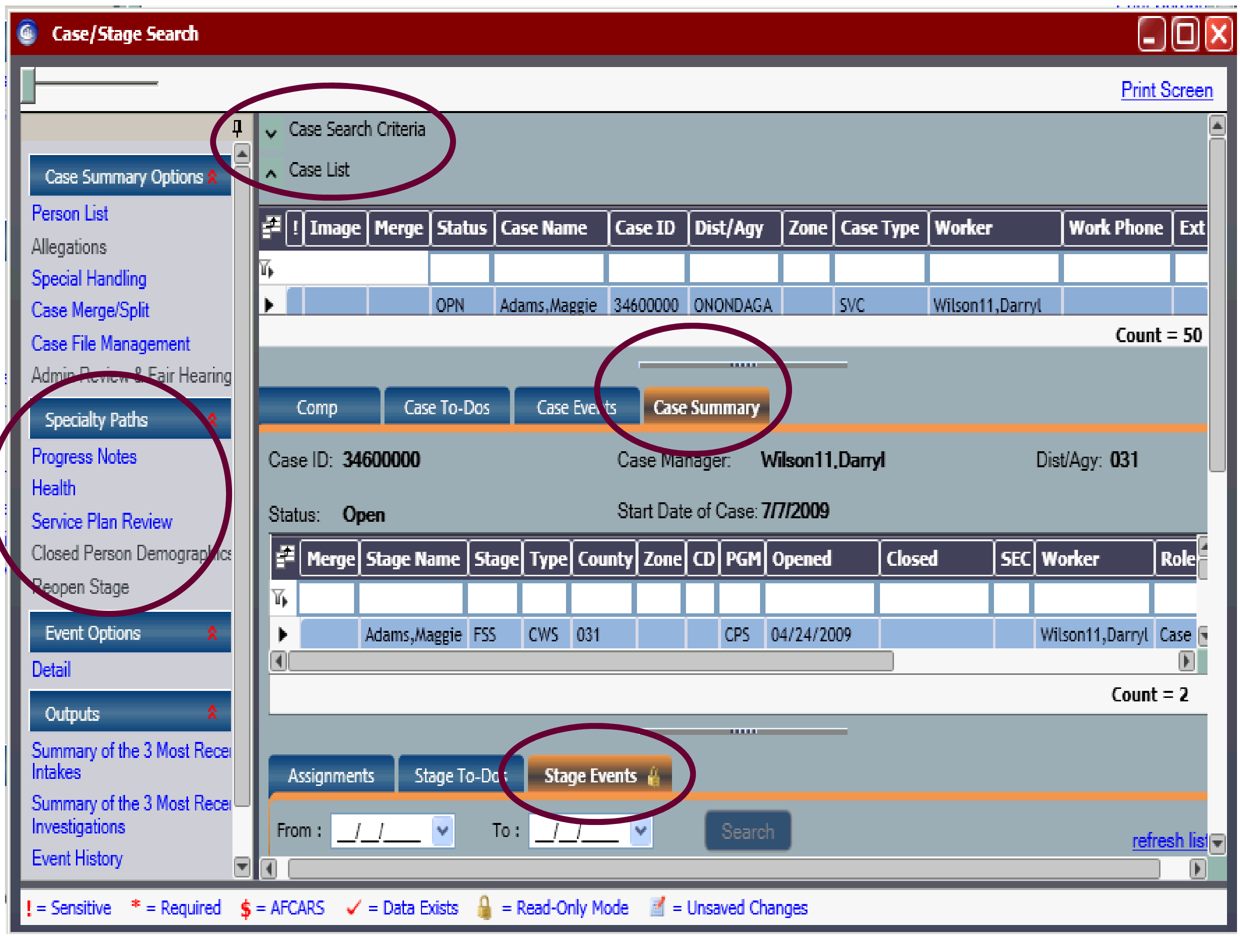
When accessed from a FSI or FSS stage, the **Case Search** process has not been modified at this time.



Case/Stage Search (cont'd)

Depending on selections made by the worker, the **Case/Stage Search** window may include up to 4 sections, and each section may have multiple tabs. In the example below, the **Case Search Criteria, Case List, Case Summary** and **Stage Events** have been selected.

Note: The **Specialty Paths** section in the **NAVIGATION PANE** can be used by support staff, health and education specialists and third party reviewers to access specific windows in CONNECTIONS



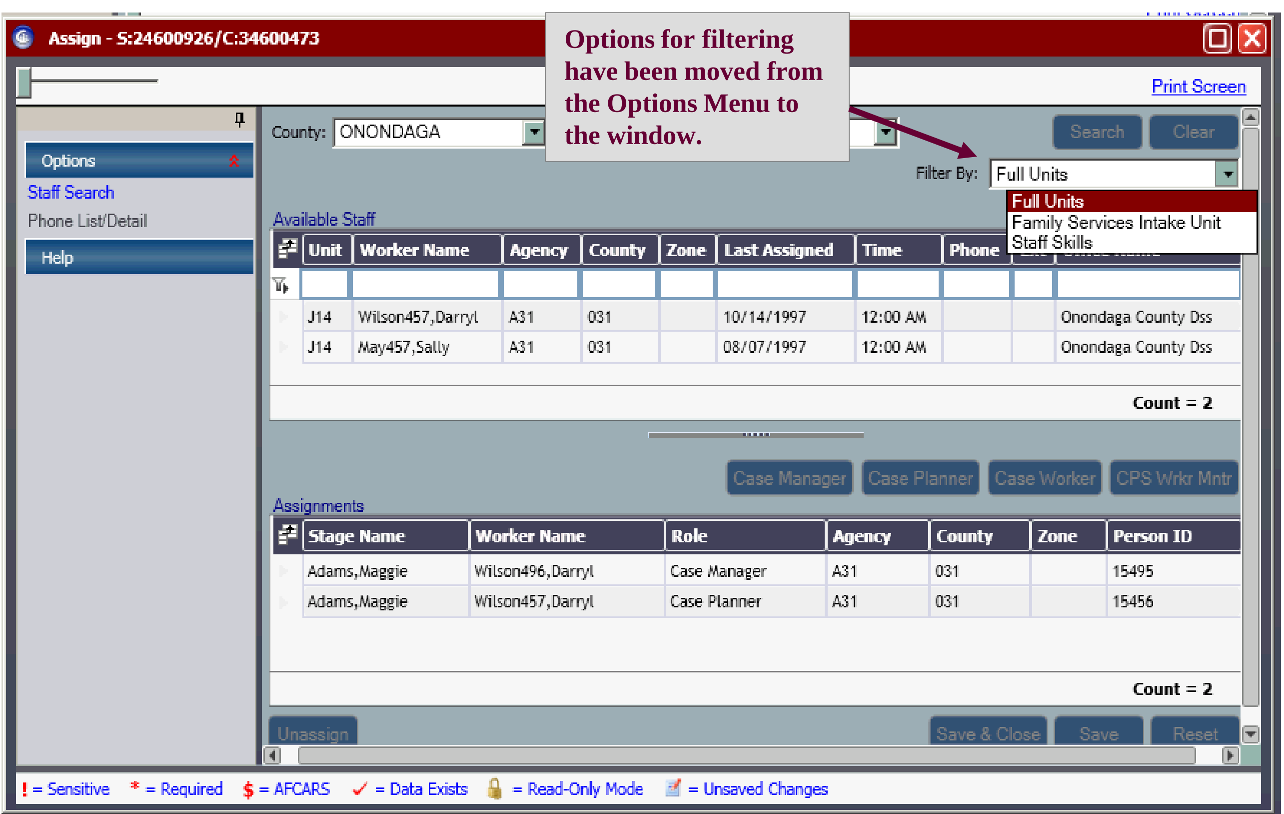
Assign Window

The **Assign** window can be accessed in either an update or a read-only mode. When accessed in an update mode, the window includes two sections, **Available Staff** and **Assignments**. The **Available Staff** section includes a default list of staff who are case assignable in the unit of the logged-on worker. The Staff Search link in the **NAVIGATION PANE** can be used to make an assignment to a worker who is not on the default list.

When accessed in read-only mode, from **Case Summary**, the **Assign** window opens as a tab where the user can see assignments for a particular stage. In read-only mode the functionality to select staff for assignment is not available.

Filters previously accessed from **View Menu** have been moved directly to the **Assign** window, and appear in the **Filter By** drop-down menu. The selections in the drop-down depend on the **Stage** type being assigned. Selecting a filter limits names in the **Available Staff** list based on the selected criteria. The possible filters across all stage types are: **Full Units, On-Call Units,** and **Staff Skills, Family Services Intake Unit, Family Services VA Unit**.

The Staff Search link in the **NAVIGATION PANE** can be used to search for a staff person in a district or agency other than your own.

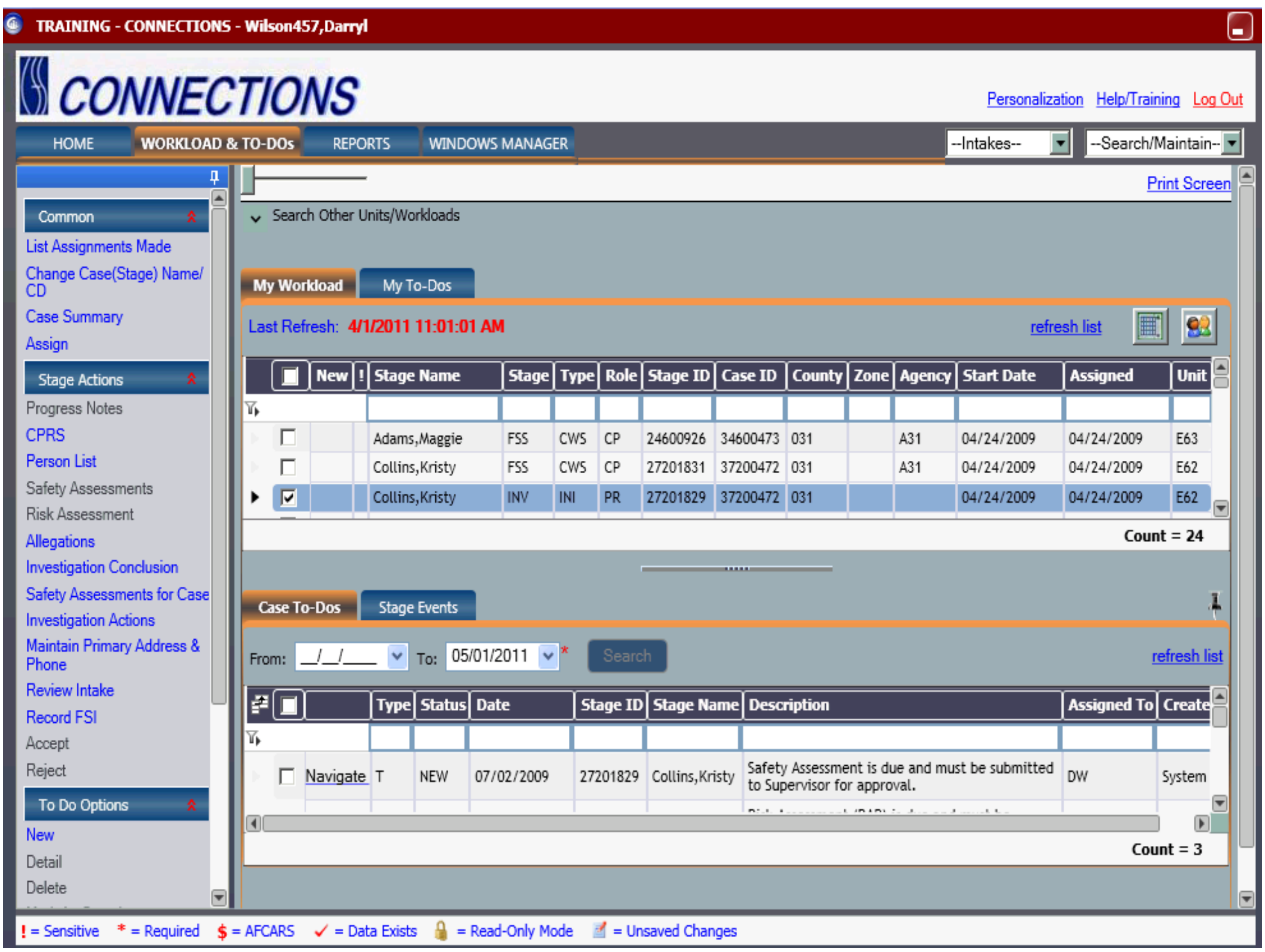


Investigation Stage

All tasks available from the former INV stage Task List are now available from the workload itself as links in the **Stage Actions** section of the **NAVIGATION PANE** after the INV stage is selected.

Some links access transformed windows. These include: **Review CPS Intake, Case Summary, Person List** (a common window,) **Safety Assessment for Case, Allegations, Investigation Actions,** and **Investigation Conclusion**.

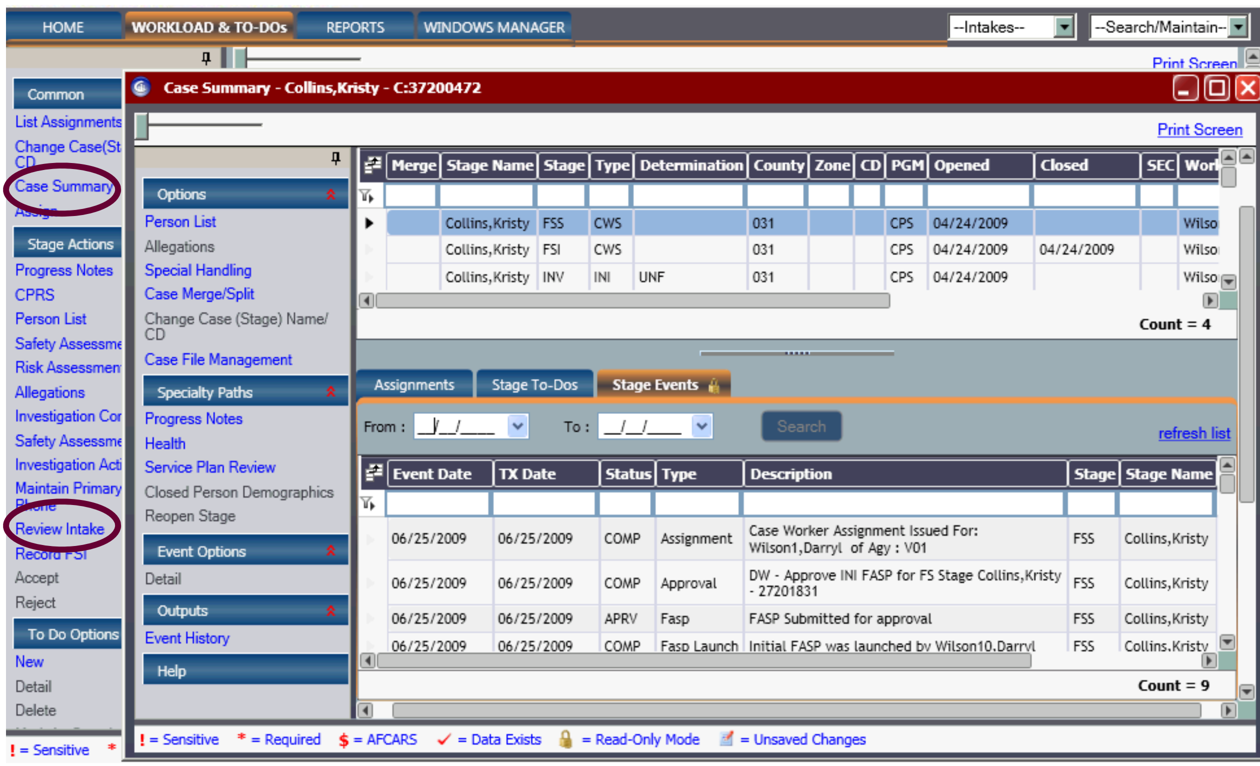
Clicking on the CPRS link opens the **Child Protective Record Summary** (CPRS) tabbed dialogue. The **CPRS** has not changed. The view and business rules remain the same, but the information from the transformed windows identified above can be accessed in Read Only mode via the **CPRS** tabs. Other windows are unchanged, including **Progress Notes, Risk Assessment Profile,** and **Safety Assessment.**

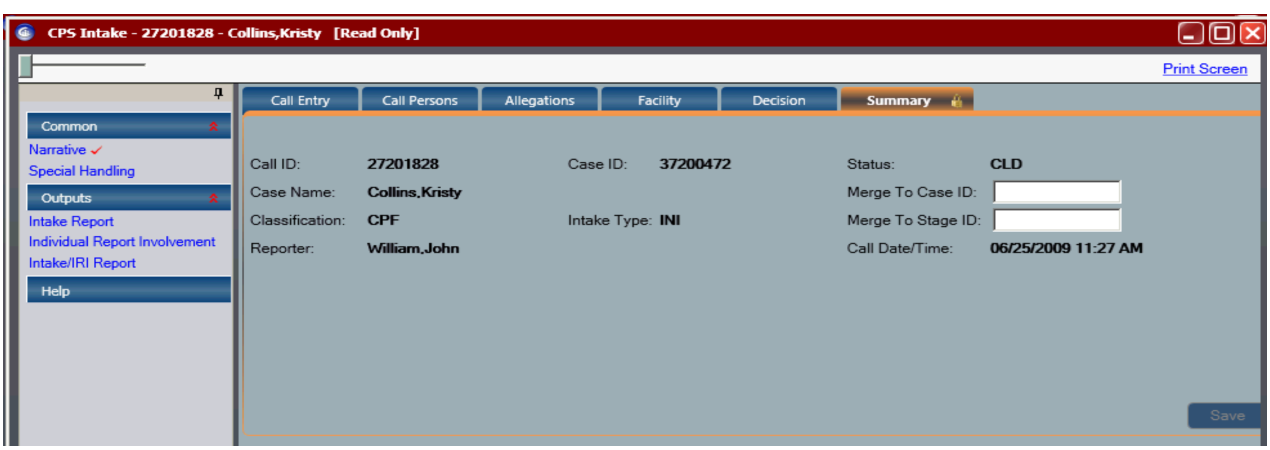


Investigation Stage

Case Summary and Review Intake

The **Case Summary** and **Review Intake** windows are transformed but maintain the same functionality. They are accessed from the workload via Case Summary link found under the **Common** section and the Review Intake link found under **Stage Actions** section of the **NAVIGATION PANE**. Once in the respective window all **Options** and **Outputs** are accessible via the window's **NAVIGATION PANE**.





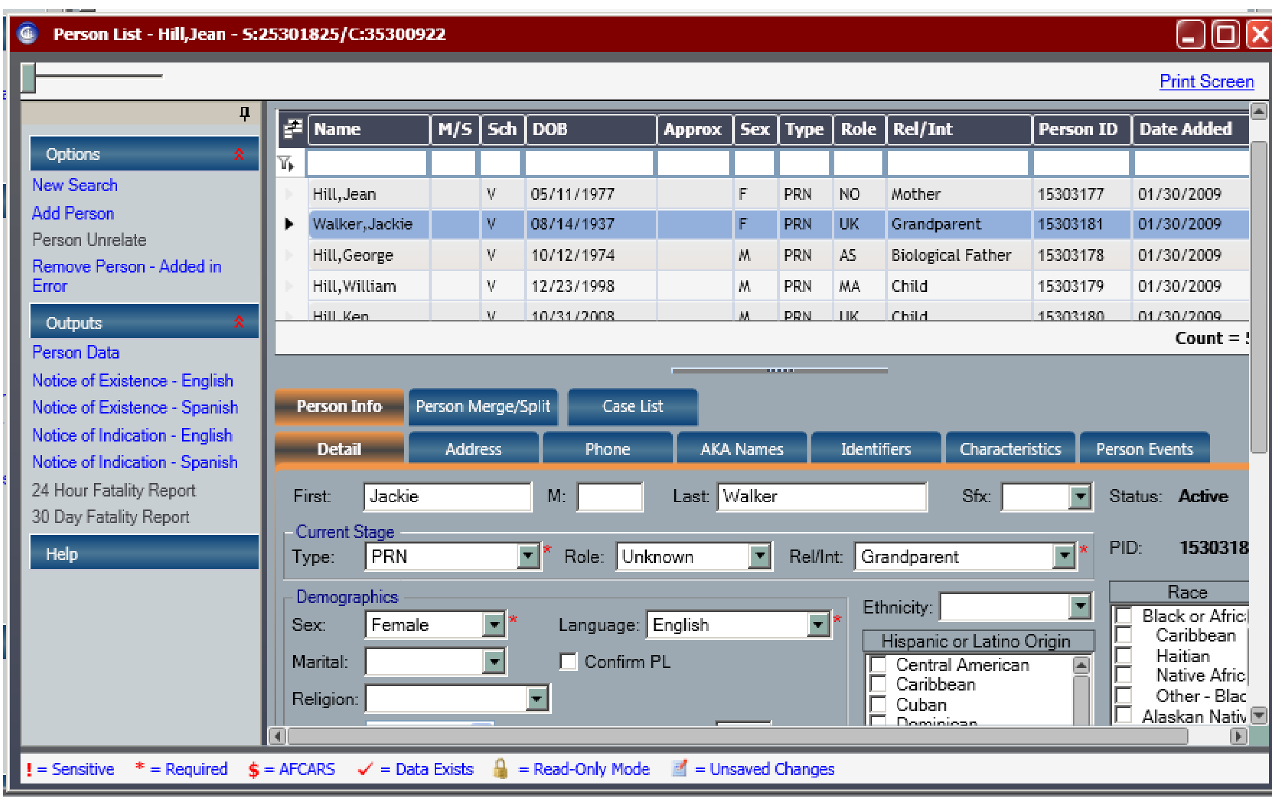
Investigation Stage

Maintaining Person Information

Information about persons listed in an investigation stage is accessed by selecting the stage and choosing **Person List** on the **NAVIGATION PANE.** The **Person List** grid displays the information for all members of the stage. Choosing a person opens the **Person Info** tab and sub-tabs below the grid. The person information can be used to view or record information about a person and as a step along the **Implied Role** path**.**

The **Person Detail** tab provides detailed information about a selected person in the **CONNECTIONS** database. Items on this window are modifiable when accessed from a workload. When accessed via a toolbar Person Search, a lock icon displays on the tab title, indicating the information is available in read only mode.

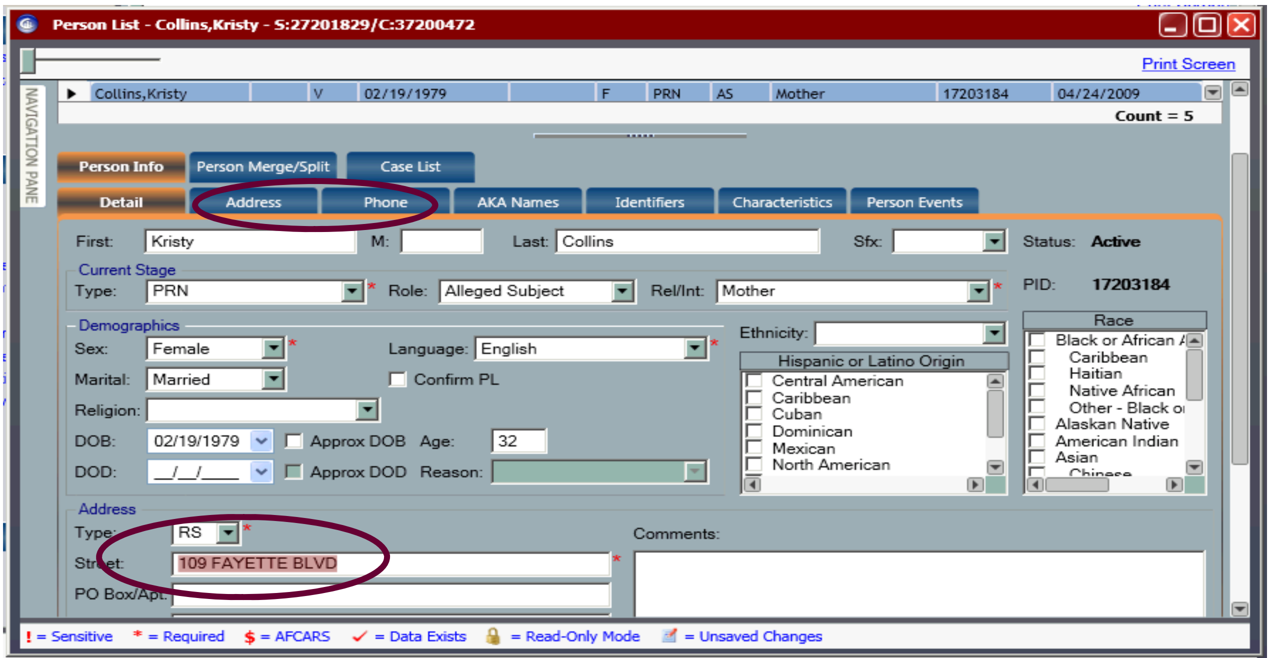
Note: When the **Person Merge Split** and **Case List** tabs are selected the **Person Info** sub-tabs no longer appear. The Person Info sub-tabs will redisplay when the **Person Info** tab is selected.

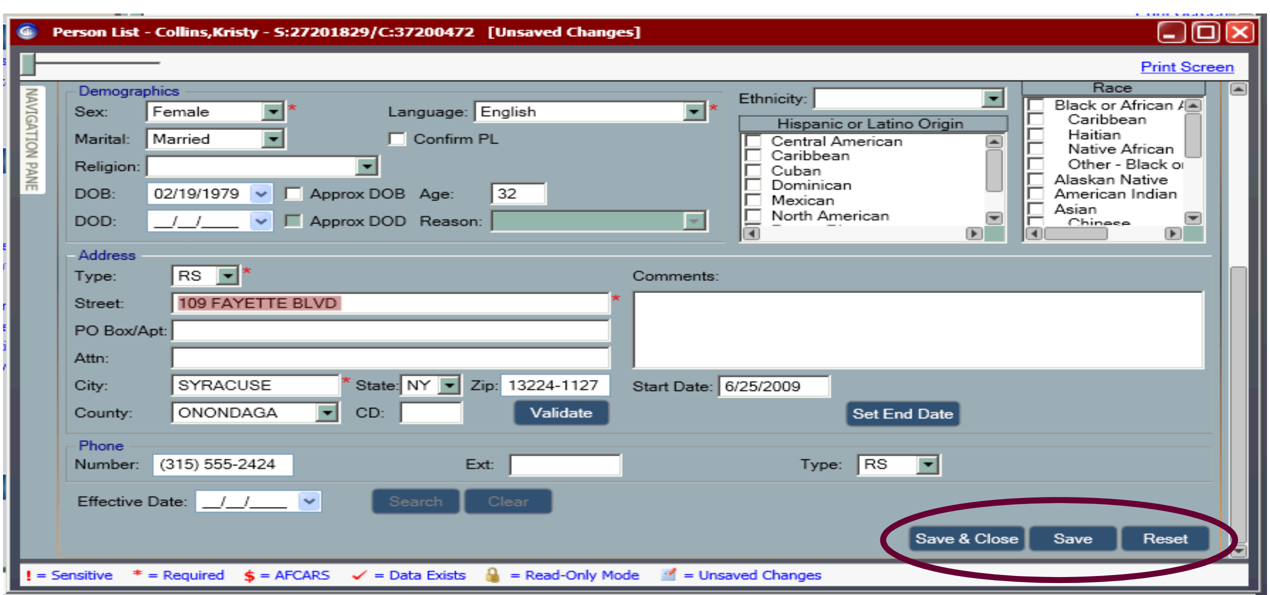


Investigation Stage

Maintaining Address and Phone Information

Address and **Phone** information can be modified directly on the **Person Detail** tab by scrolling to the bottom portion of the window. Scrolling is also necessary to locate the **Save & Close** and **Close** buttons. Address and Phone information can also be modified along with the other person information via the respective **Person Info** sub-tabs.



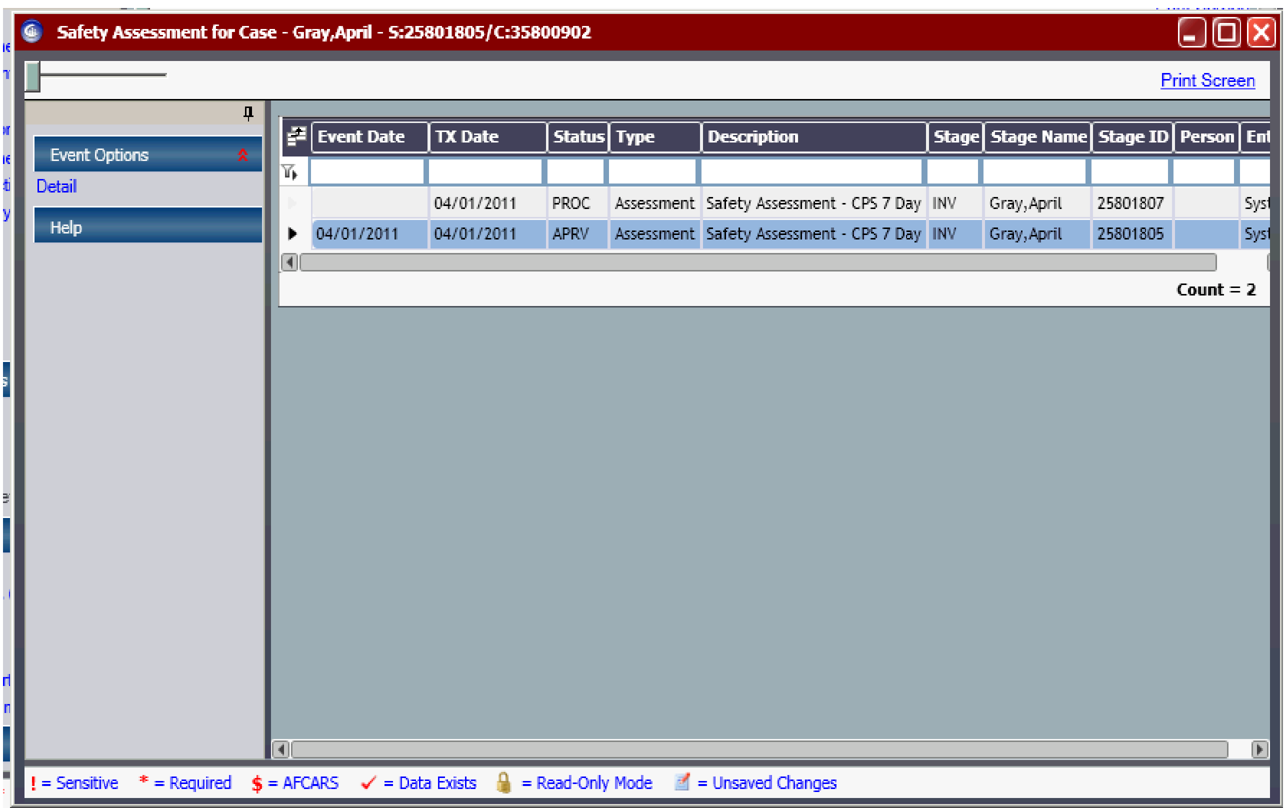


Investigation Stage
Safety Assessment for Case

No changes have been made that affect completion of the CPS Safety Assessment accessed in the CPRS. If workers need to access historical Safety Assessments completed prior to 2004 they can be viewed or printed from the **NAVIGATION PANE** in the INV Stage.

When a Safety Assessment is opened via the Safety Assessments for Case link on the **NAVIGATION PANE** it is presented in a new window. Selecting the desired assessment and clicking the Detail link opens the CPRS safety assessment dialogue.

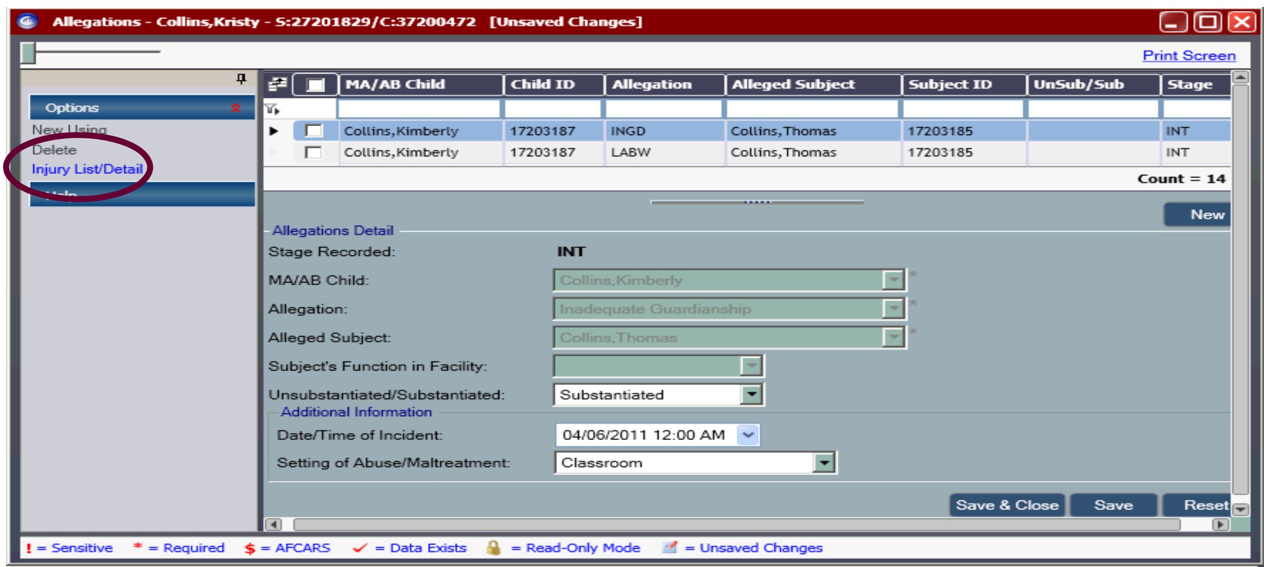
Links to print the Safety Assessment and related Intake Report also appear on the **NAVIGATION PANE.**



Investigation Stage
Allegations

The *Allegations* window combines the former *Allegations List* and *Allegation Detail* windows. When first opened only the Allegation List is displayed. Selecting an allegation displays the **Allegation Detail** section of the window. The *Injury List/Detail* window is accessed via the Injury List/Detail link in the **NAVIGATION PANE**. New and New Using functionality is unchanged.

Please Note that any information recorded on the *Injury List/Detail* window is saved to the database when the associated allegation is saved. If injuries have been recorded, a check mark appears on the **NAVIGATION PANE**.

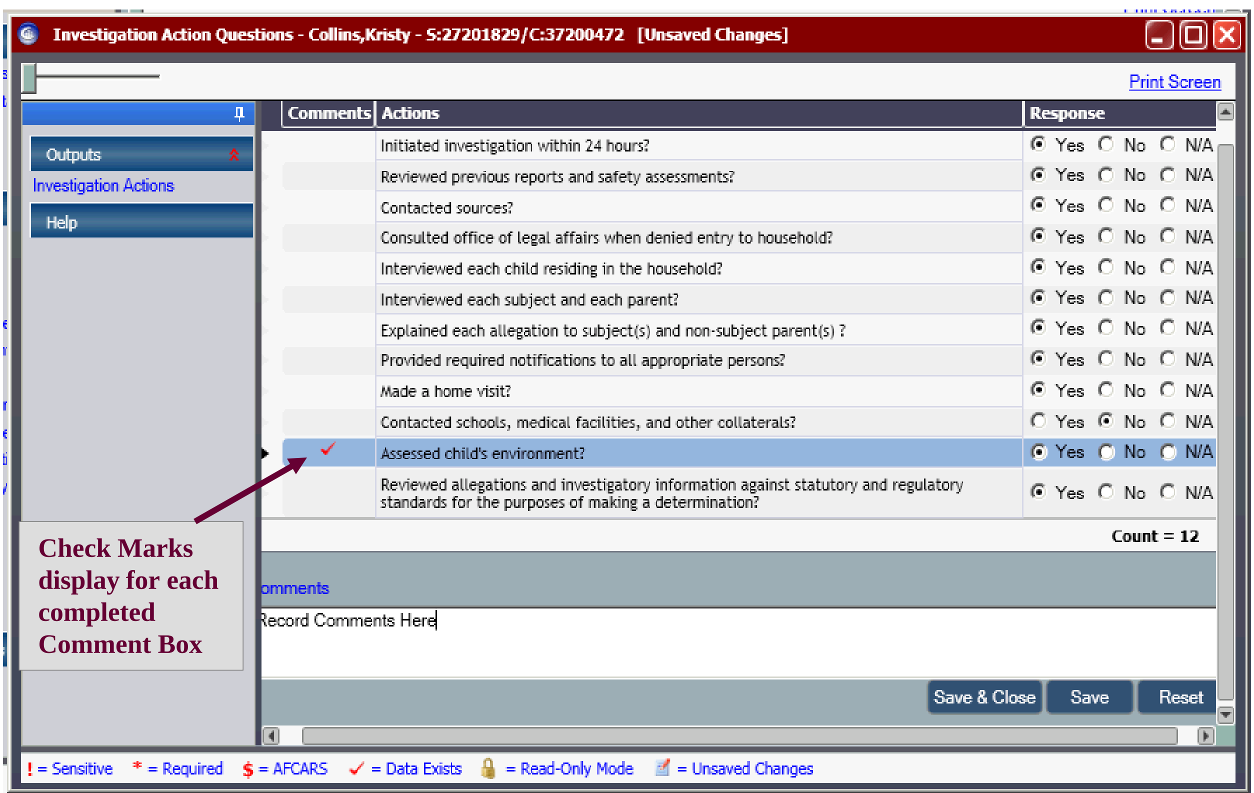


Investigation Stage

Investigation Actions

The business rules on the *Investigation Actions Questions* window have not changed. The window displays a list of questions upon opening. If required by a local district, the system requires a **Yes, No,** or **Not Applicable** response for each question. After a question is answered, a comment box displays for additional information to be recorded regarding that question. A check mark displays in the **Comments** column on the window indicating that additional information for that item exists. If comments are removed, the check mark no longer displays. Comments can be accessed after they are saved by highlighting the row in the grid.

The **Investigation Actions** output can be printed via a link in the **NAVIGATION PANE**.



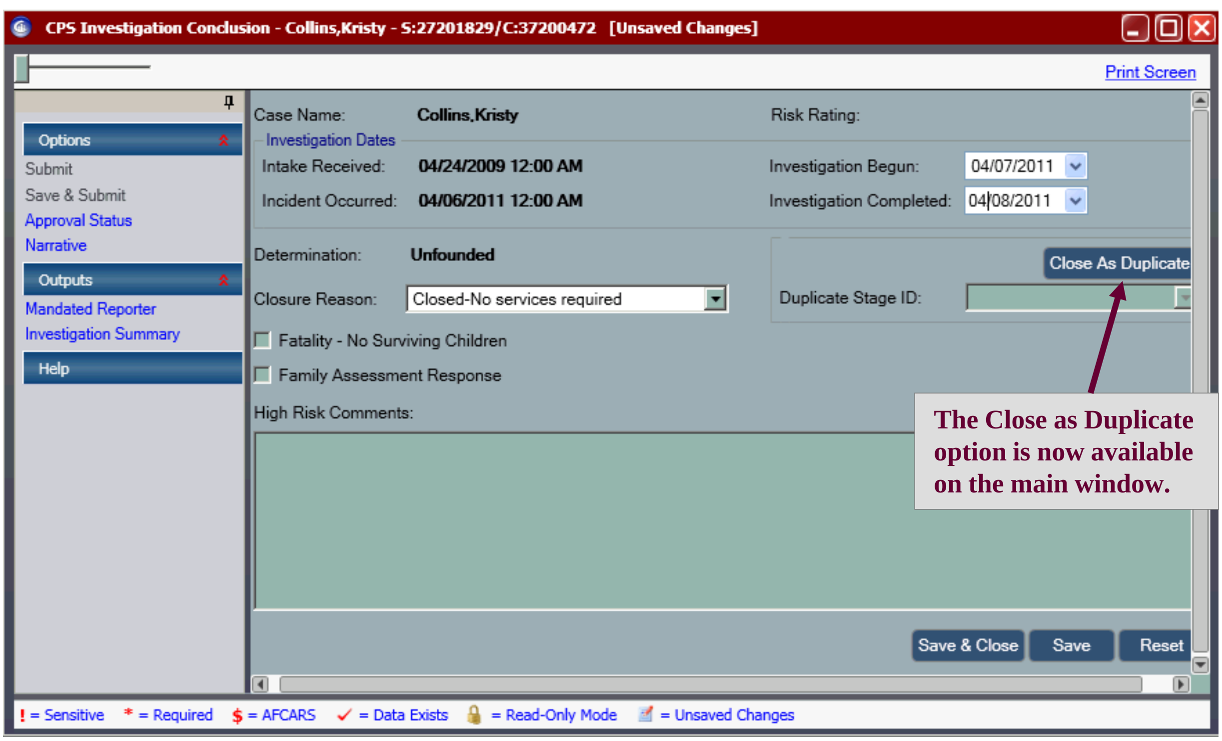
Investigation Stage
Investigation Conclusion

When the Investigation Conclusion link on the **NAVIGATION PANE** is selected the **Investigation Conclusion** window is opened and the Mandated Reporter and Investigation Summary output links display. An additional link provides access to the **Investigation Conclusion Narrative**. A red check mark next to the Narrative link indicates that narrative information has been saved.

The **NAVIGATION PANE** also contains links for Submit, Save & Submit and Approval Status. Selecting the Submit or the Save & Submit link will open the **To-Do Detail** window in order to submit the investigation for supervisory approval. **Note**: closing the **To-Do Detail** brings the worker back to workload.

A **Close as Duplicate** button and **High Risk Comments** field have been moved to the **Investigation Conclusion** window, replacing the menu items on the **Options** Menu. All business rules regarding these functions are the same.

Fatality, Family Assessment Response and WMS #Validated will display on the window when applicable.

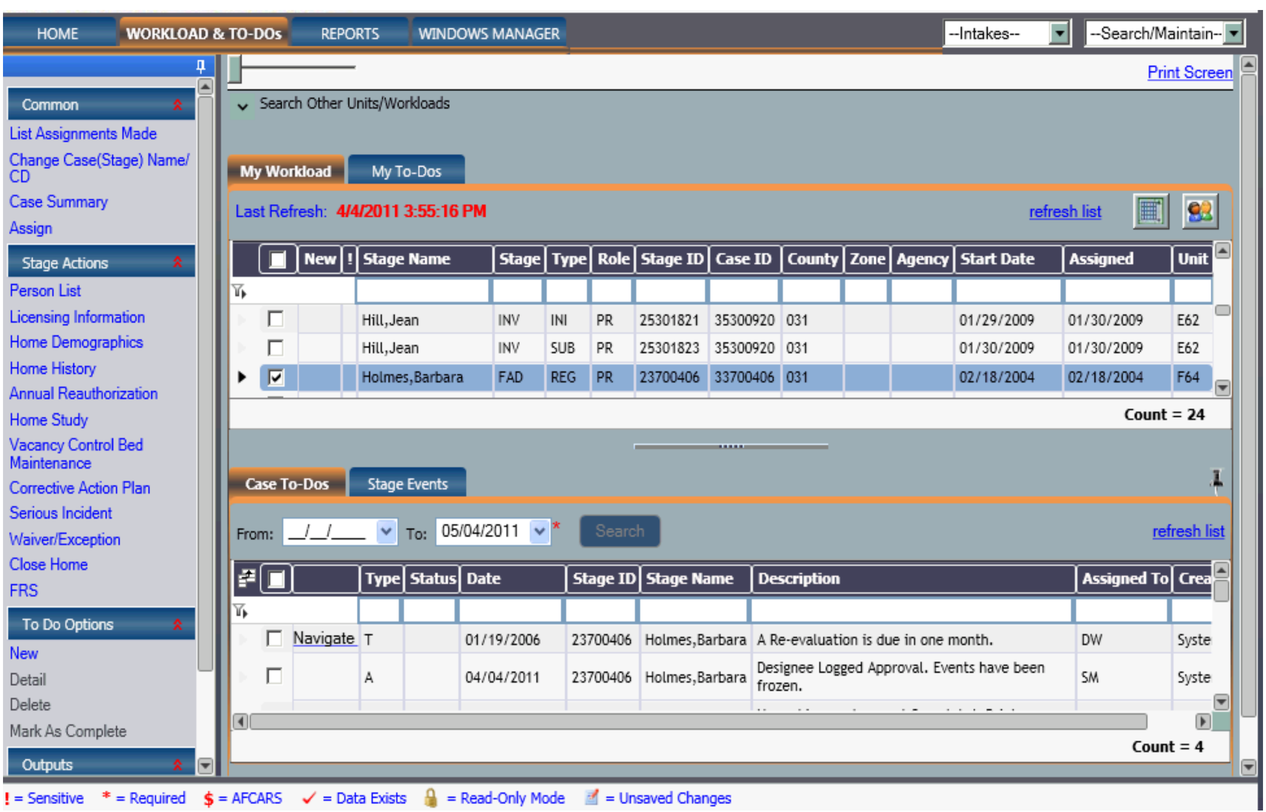


Foster/Adoptive Home (FAD) Stage

All tasks available from the FAD stage Task List are now available from the workload as links in the **NAVIGATION PANE** after the FAD stage is selected.

Some links access windows that have been transformed. These include: **F/A Home Search and List**, **Re-Open Closed Home, Person List** and **Adding/Relating** in a FAD stage, **Home Demographics** (Maintain Non-Licensing Information), **Home License** (Maintain Licensing Information), **Annual Reauthorization, Home History-Detail, Corrective Action Plan, Serious Incident Report, Waiver/Exception Report**, and **Close Home.**

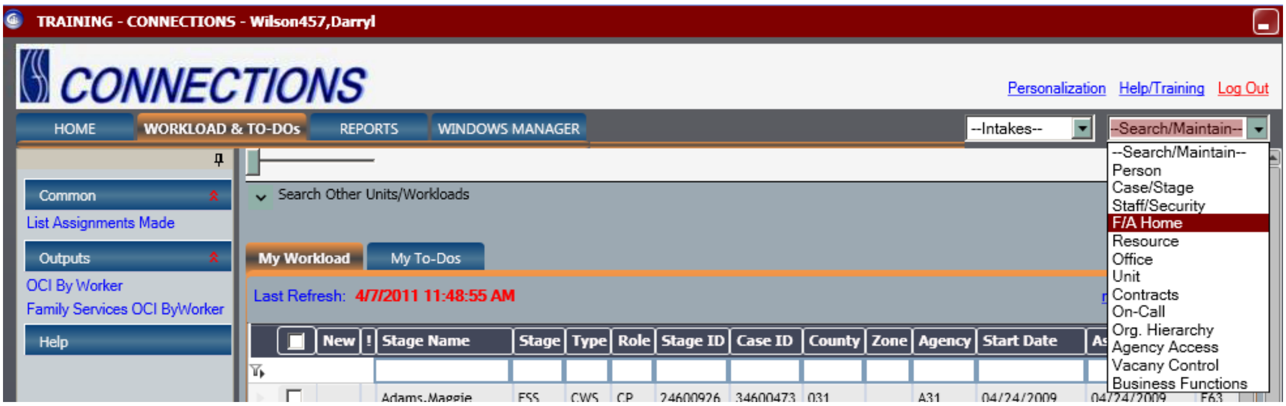
Clicking on the Home Study, Annual Reauthorization or FRS links opens the **FAD Record Summary (FRS)** tabbed dialogue. When the Annual Reauthorization link is accessed for the first time after a previous Annual Reauthorization has been approved, a new window appears to allow the selection of **New** or **Use Prior**. Once that selection is made clicking the Annual Reauthorization link also opens the **FRS** tabbed dialogue. The FRS link is the same as the former **View FAD Record Summary** task. When entering via this link, the FRS is read only. The **FRS** tabbed dialog has not changed. The view and business rules remain the same.

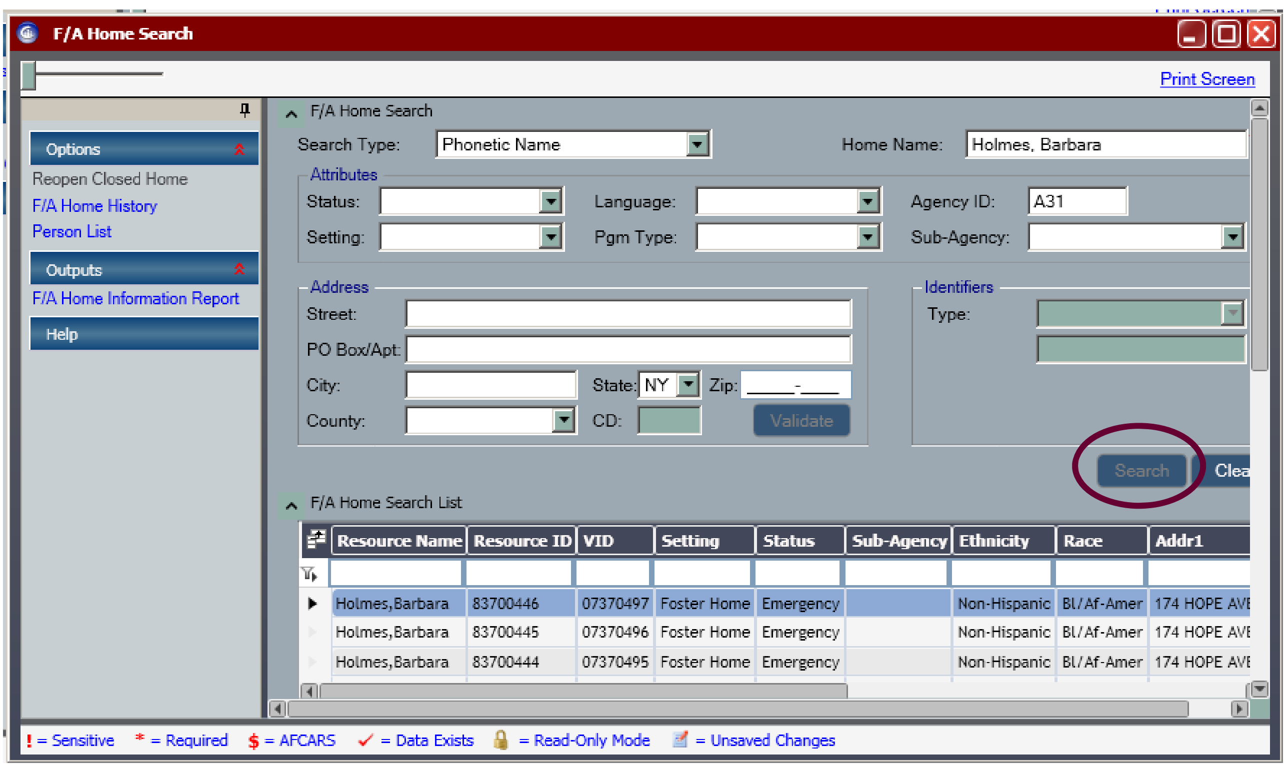


Foster/Adoptive Home Stage

Foster/Adoptive Home Search

The changes to the **F/A Home Search** window follow the common updates to all search windows. **F/A Home** is selected from the **Search/Maintain** drop-down on the toolbar. Search criteria are entered in the new **F/A Home Search** window and **Search List** results are returned in a grid within the window.

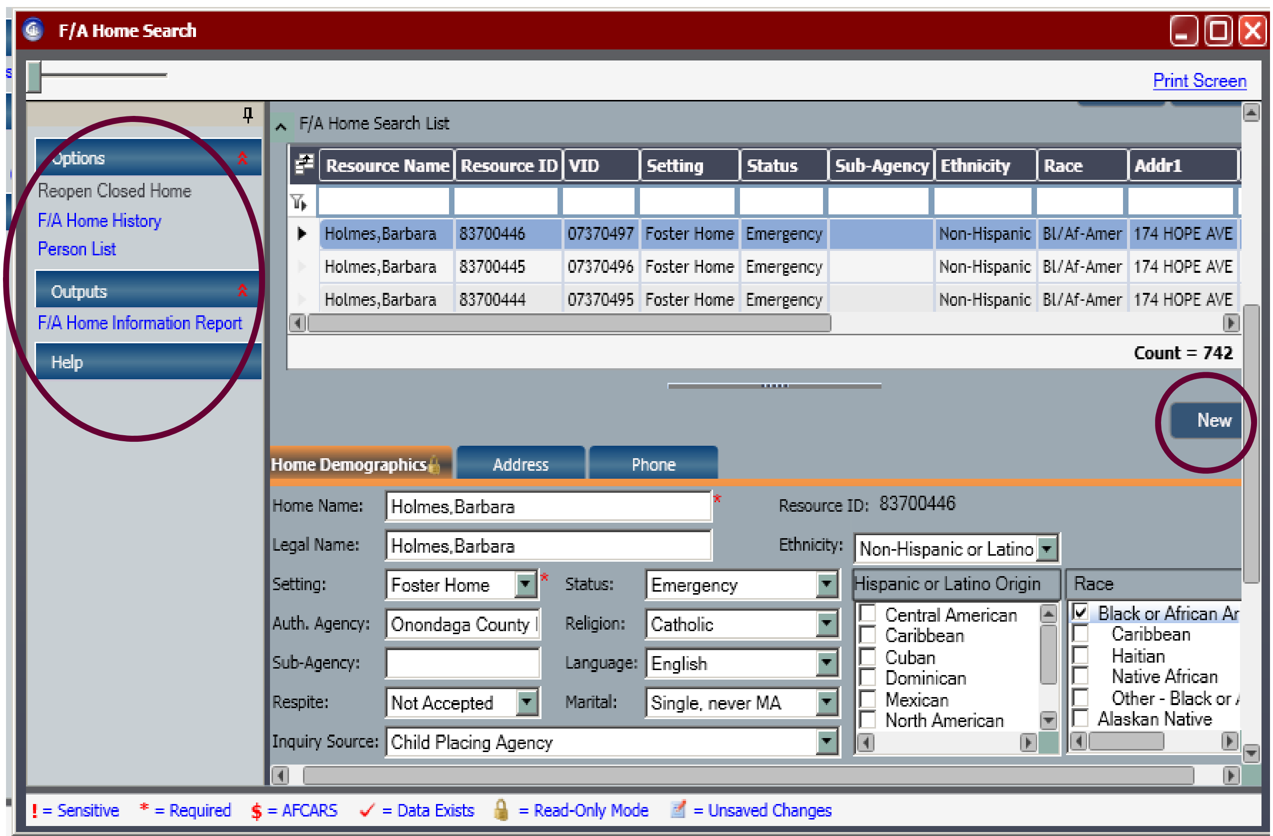




The Foster/Adoptive Home Stage
Foster/Adoptive Home Search (cont'd)

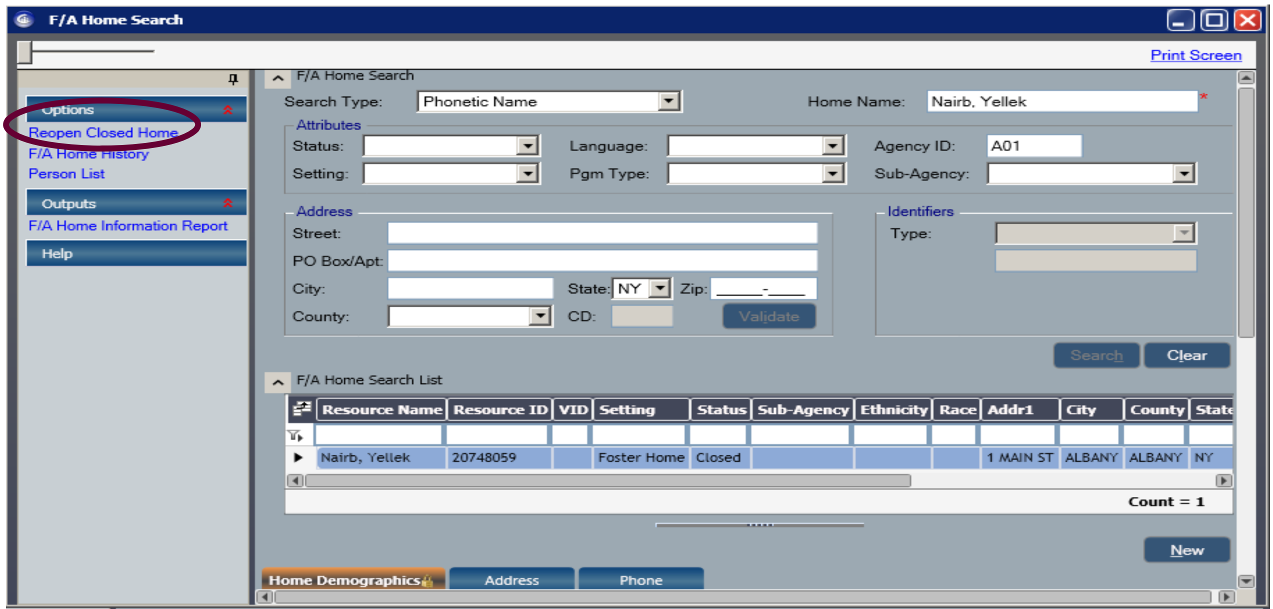
Selecting a result in the **F/A Home Search List** displays additional details in the **Home Demographics, Address** and **Phone** tabs beneath the results grid. All address and phone information is available in the tabs and is no longer be accessed in separate windows. The commands from the current **Options** menu display as links in the **NAVIGATION PANE Options** section. The **Outputs** section additionally displays the link for the **F/A home Information Report** when a home is selected from the search results grid.

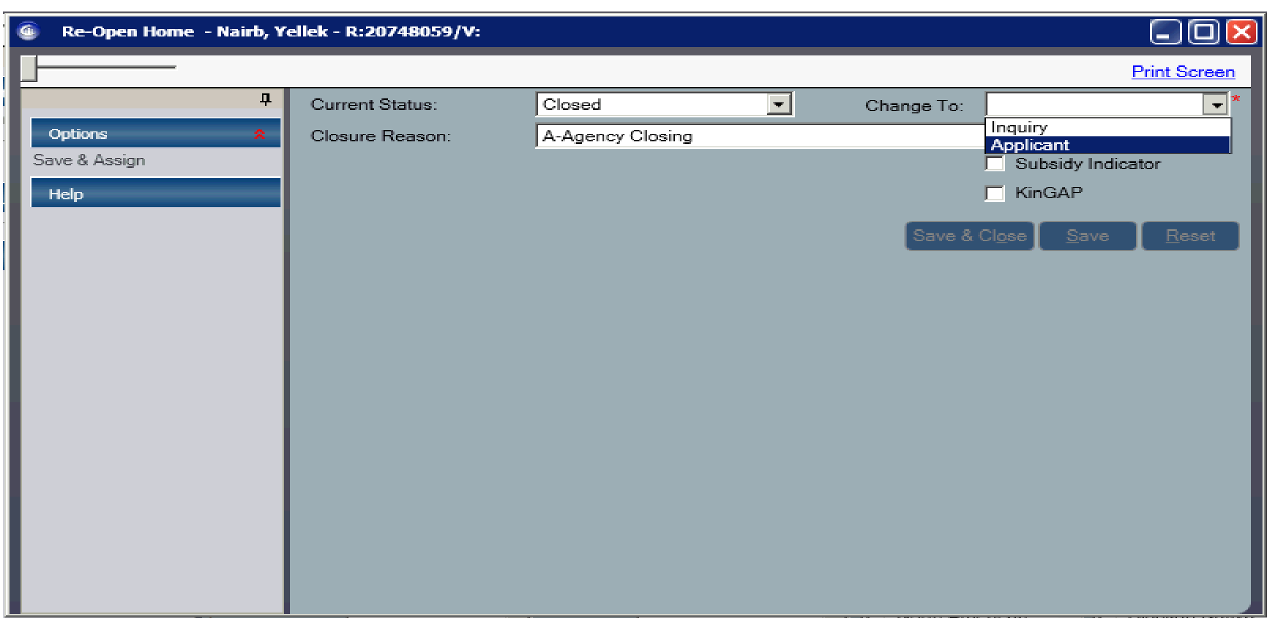
If there are **no existing** closed homes in CONNECTIONS, selecting the **New** button **enables the Home Demographics, Address** and **Phone** tabs for data entry. Once **New** is selected, the Save and Assign link (not shown) also displays in the **NAVIGATION PANE.**



The Foster/Adoptive Home Stage
Re-open Closed Home

It is possible to reopen a closed home found during a **F/A home Search** by selecting the home from the **F/A Home List** and then selecting the Reopen Closed Home link from the **Options** section in the **NAVIGATION PANE.** This will open the new **Reopen Home** window. The home's **Status** can then be updated to **Inquiry** or **Applicant** and then saved and assigned to the desired worker.



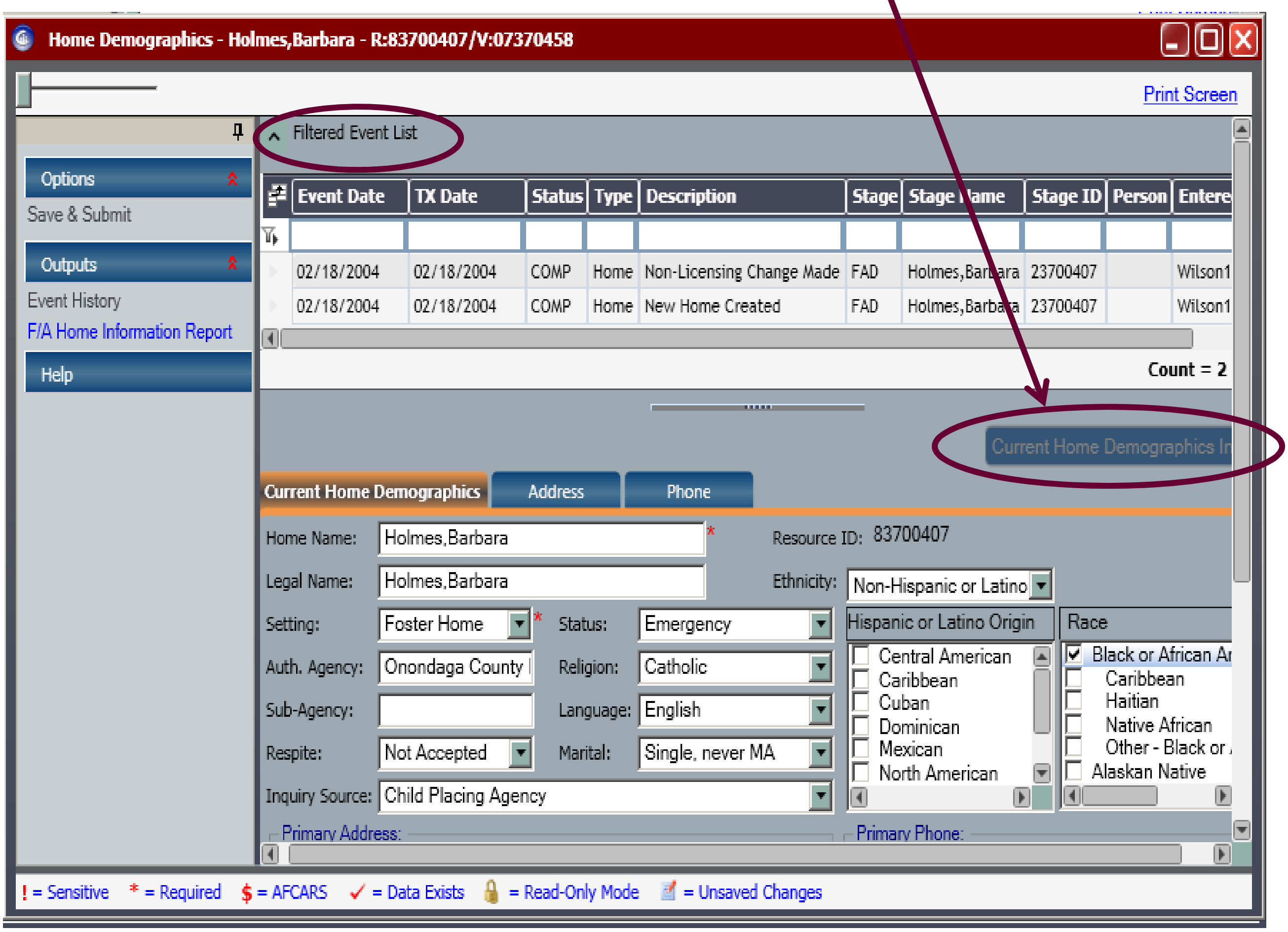


The Foster/Adoptive Home Stage

Home Demographic Information

Household information for an established home continues to be maintained on the **Home Demographics** window. The window is accessed by selecting the desired stage on the workload and clicking on the Home Demographics link in the **NAVIGATION PANE.** The window can also be accessed by selecting the Navigate link on a To-Do which has the **Maintain Non-Licensing Information** task.

When accessed through the workload, the new window incorporates the elements currently found through the **List** and **Detail** buttons on the former Task List when the **Maintain Non-Licensing Information** task is selected. The new window incorporates the existing address and phone windows as tabs in the same manner as the new search window. There is also a new **Filtered Event List** that can be used to access historical home demographic information**.** When historical information is viewed, the **Current Home Demographic Info** button is enabled to allow for return to current information.



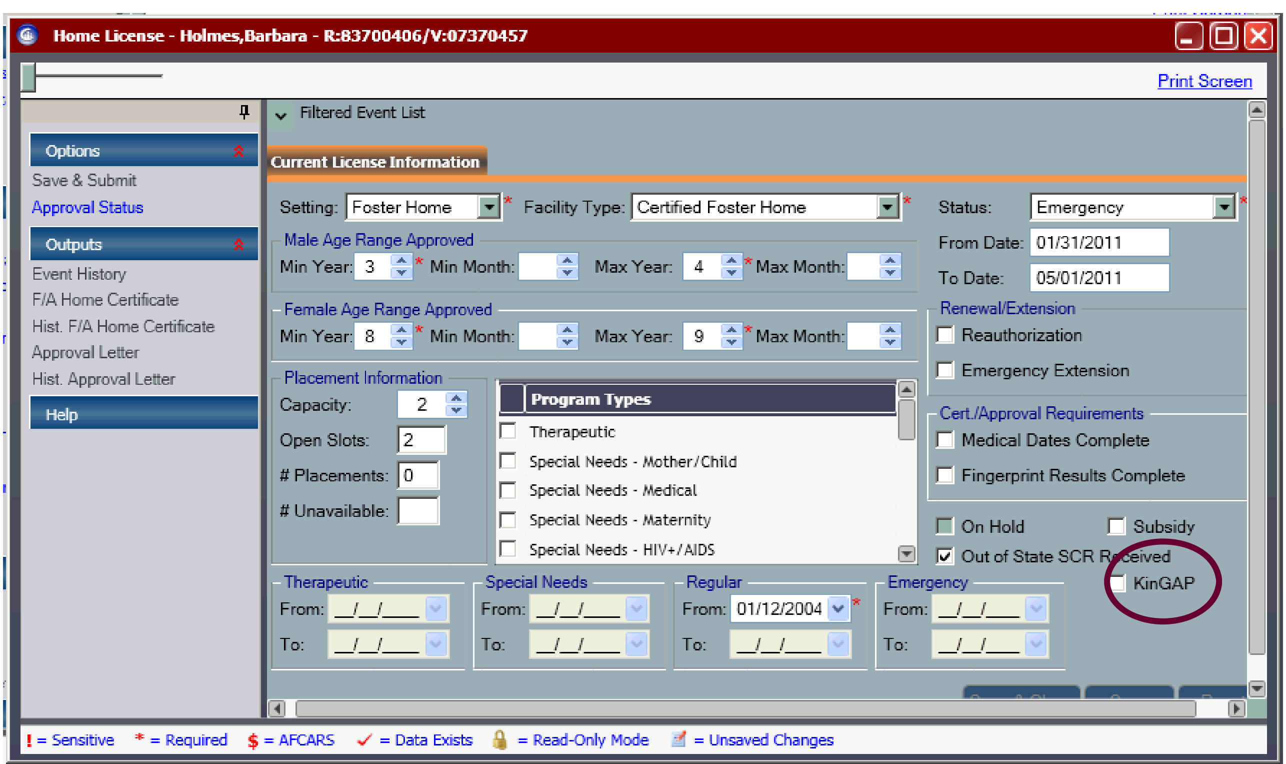
The Foster/Adoptive Home Stage

Home License Information

The **Home License** window is accessed by selecting the desired stage on your workload and selecting the Licensing Information link on the **NAVIGATION PANE.** The transformed **Home License** window incorporates the elements that you currently access through the List and Detail buttons on the Task List when the **Maintain Licensing Information** task is selected. This window can also be reached in modify mode through a To-Do with a **Maintain Licensing Information** task, however, in this instance, the window will not display an Event List.

When entered from the workload, the **Event List** section is collapsed and the detail tab will be labeled **Current Home License.** Selecting a record from the filtered event list (after expanding it) changes the tab label to **Hist. Home License** with the corresponding detail information filling the window. Selecting a historical record enables the appropriate link in the **Outputs** section of the **NAVIGATION PANE** if an historical letter or certificate is needed. Selecting the **Current Home License Info** button brings back the current information.

Note: a new program called **Kinship Guardianship Assistance (KinGAP)** is coming into effect at the same time as the transformation. A new **Facility Type** value of Kinship Guardianship and a **KinGAP** checkbox are being added to the **Home License** window to support payment.



The Foster/Adoptive Home Stage

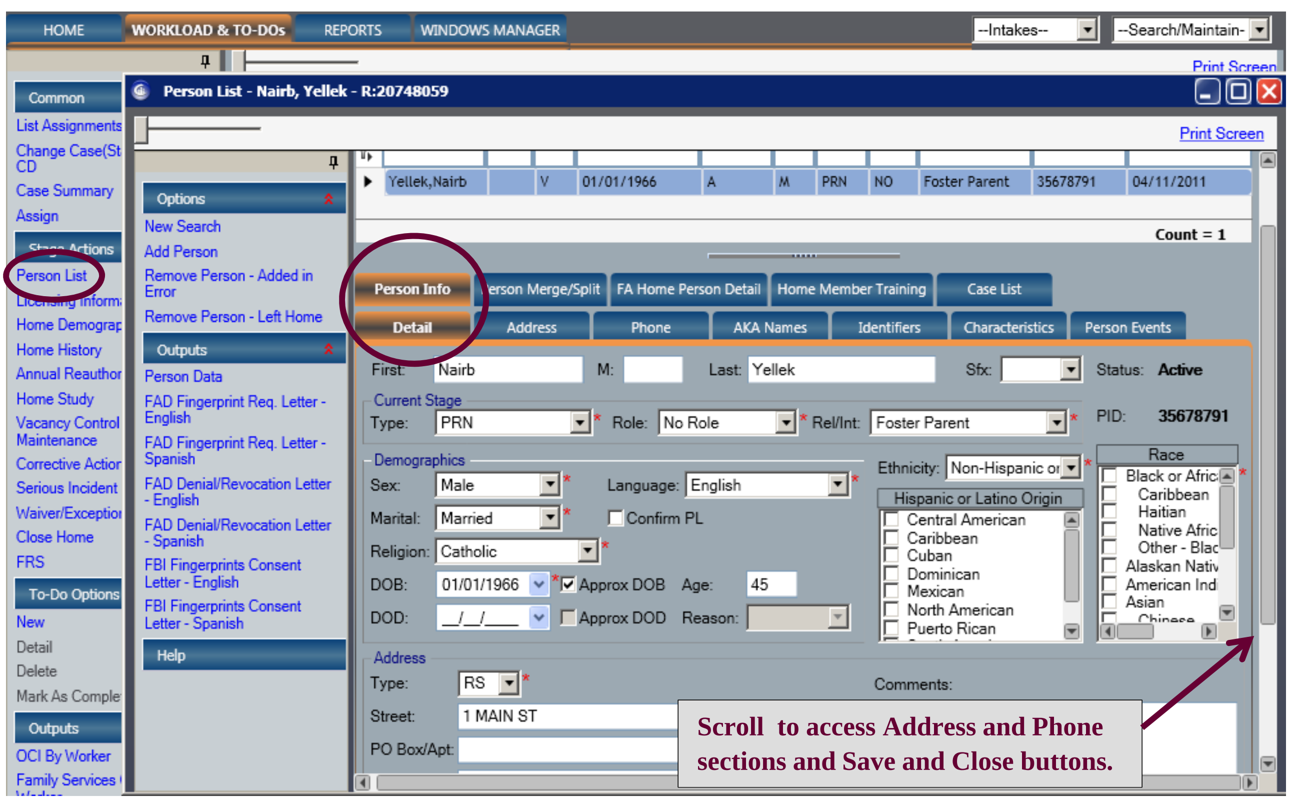
Maintaining Person Information

Information about persons listed in a Foster and Adoptive Home stage is accessed by selecting the stage and choosing Person List link on the **NAVIGATION PANE**. The **Person List** grid displays the information for all members of the stage. Choosing a person opens several tabs below the grid. The **Person Info** tab and its corresponding sub-tabs can be used to view or record detailed information about a person.

The **Person Detail** sub-tab provides detailed information about a person selected in the **Person List** grid. Items on this window are modifiable when accessed from a workload. When accessed via **Person Search**, a lock icon displays on the tab title, indicating the information is available in read only mode.

Address and Phone information can be modified directly on the **Person Detail** sub-tab by scrolling to the bottom portion of the window or on their individual **Address** and **Phone** sub-tabs. Other **Person Info** sub-tabs include **AKA Names, Characteristics** and **Person Events**. Scrolling is also necessary to locate the **Save** and **Close** buttons.

Note: When the **Person Merge Split** and **Case List** tabs are selected the **Person Info** sub-tabs no longer appear. The Person Info sub-tabs will redisplay when the **Person Info** tab is selected.



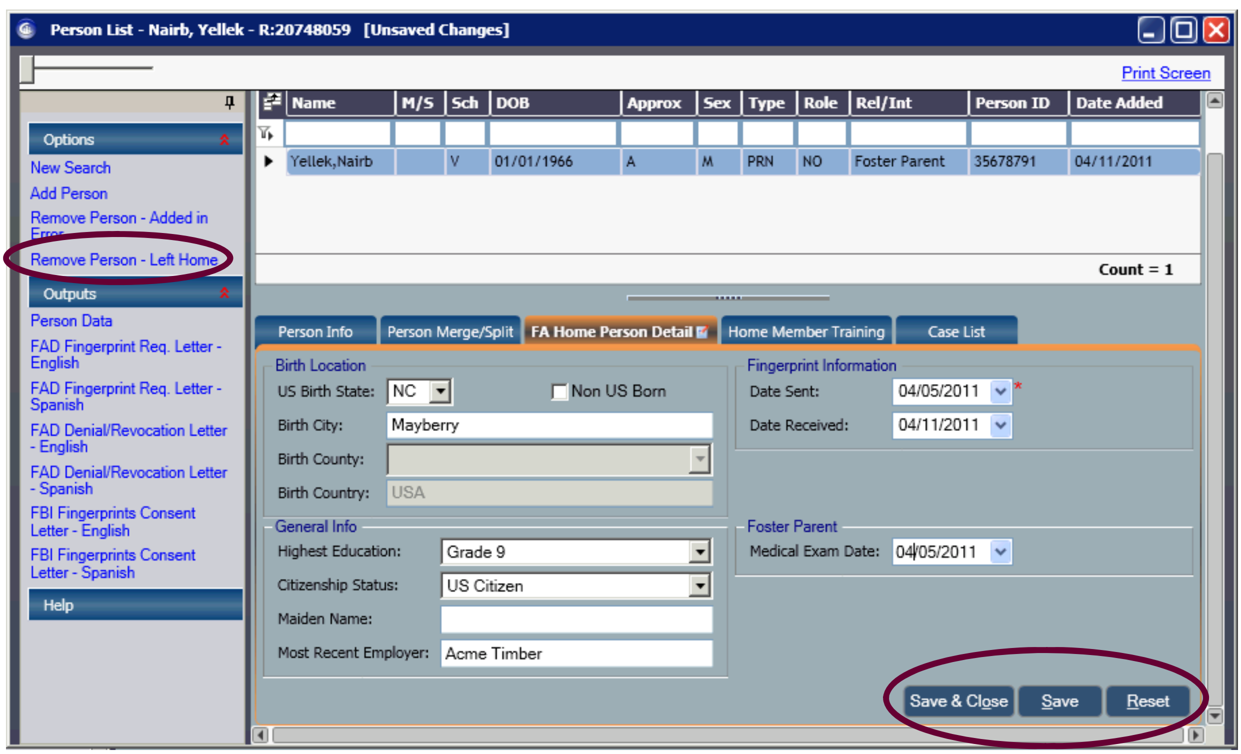
The Foster/Adoptive Home Stage

Maintaining Person Information (Cont'd)

In addition to the **Person Info** tab, there are four other tabs used to record or view FAD person information. The **Person Merge/Split**, **F/A Home Person Detail** (Medical Exam and Fingerprint dates), **Home Member Training** and **Case List** tabs are also now available via the **Person List**. Since these tabs do not have corresponding sub-tabs, a collapsed view is displayed. Selecting the **Person Info** tab re-displays all sub tabs.

The **Options** section in the **NAVIGATION PANE** allows for adding or removing person(s) from the stage and all letters and notifications can now be found under the **Outputs** section.

The Historical Person List link displays under **Options** with the Data Exists ✓ indicator when historical person records exist. The indicator will be displayed as soon as a person has been removed (using the Remove Person – Left Home link) from a FAD stage (or end-dated in a FSS stage).

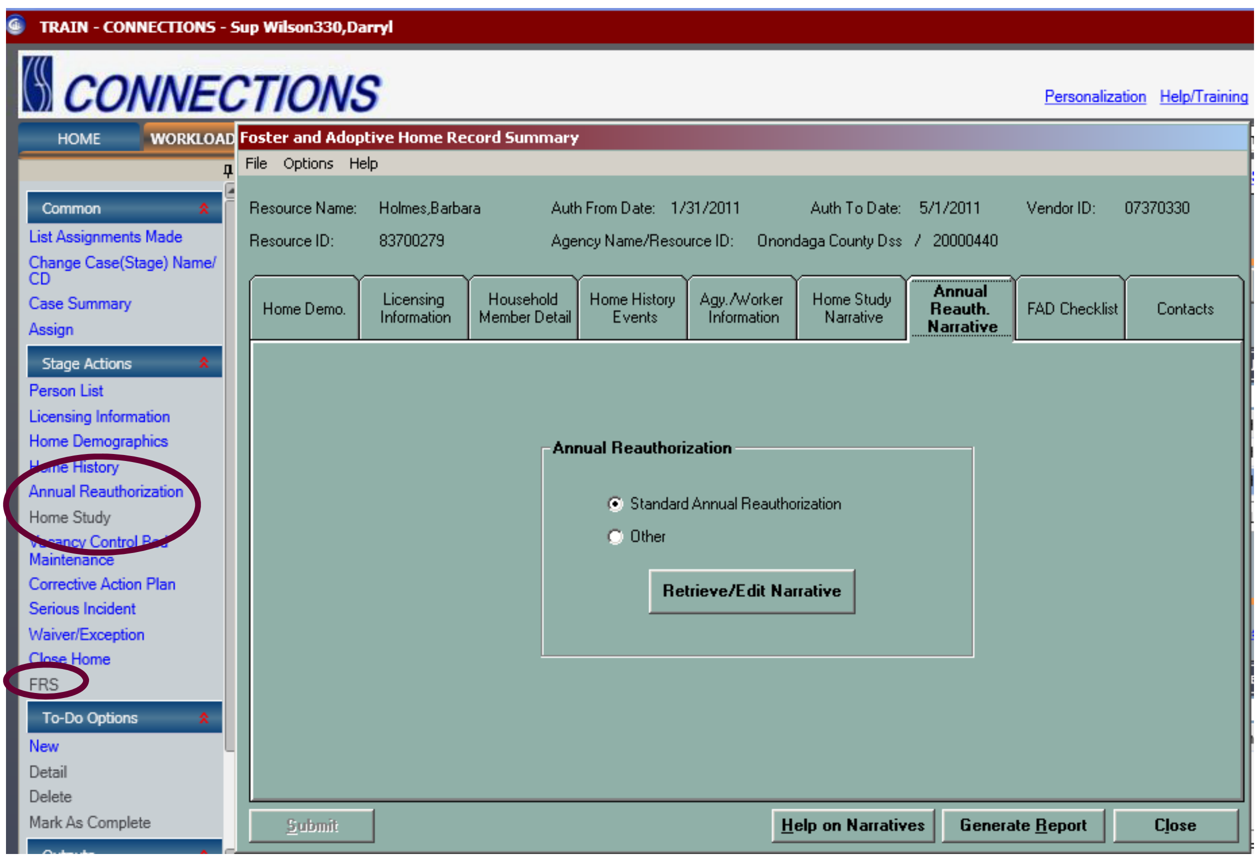


The Foster/Adoptive Home Stage

Home Study, Annual Reauthorization, and FRS

The Home Study, Annual Reauthorization and FRS links allow access to the **Foster/Adoptive Home Record Summary (FRS)**. The Home Study link provides modify access to the FRS prior to the Annual Reauthorization update period, which is 90 days before the home's expiration (Authorized To) date. The Annual Reauthorization link provides modify access to all FRS tabs during the 90 day period, The FRS link provides a read only view of the FRS.

The existing message that is displayed upon selecting the **Annual Reauthorization** task when a Home Study is already in process will now say *"In-process Home Study exists and will be saved as final upon approval of Reauthorization. Revise if necessary"*. If this message is presented, the worker should finalize any changes to the Home Study narrative prior to submitting the Reauthorization to their supervisor.

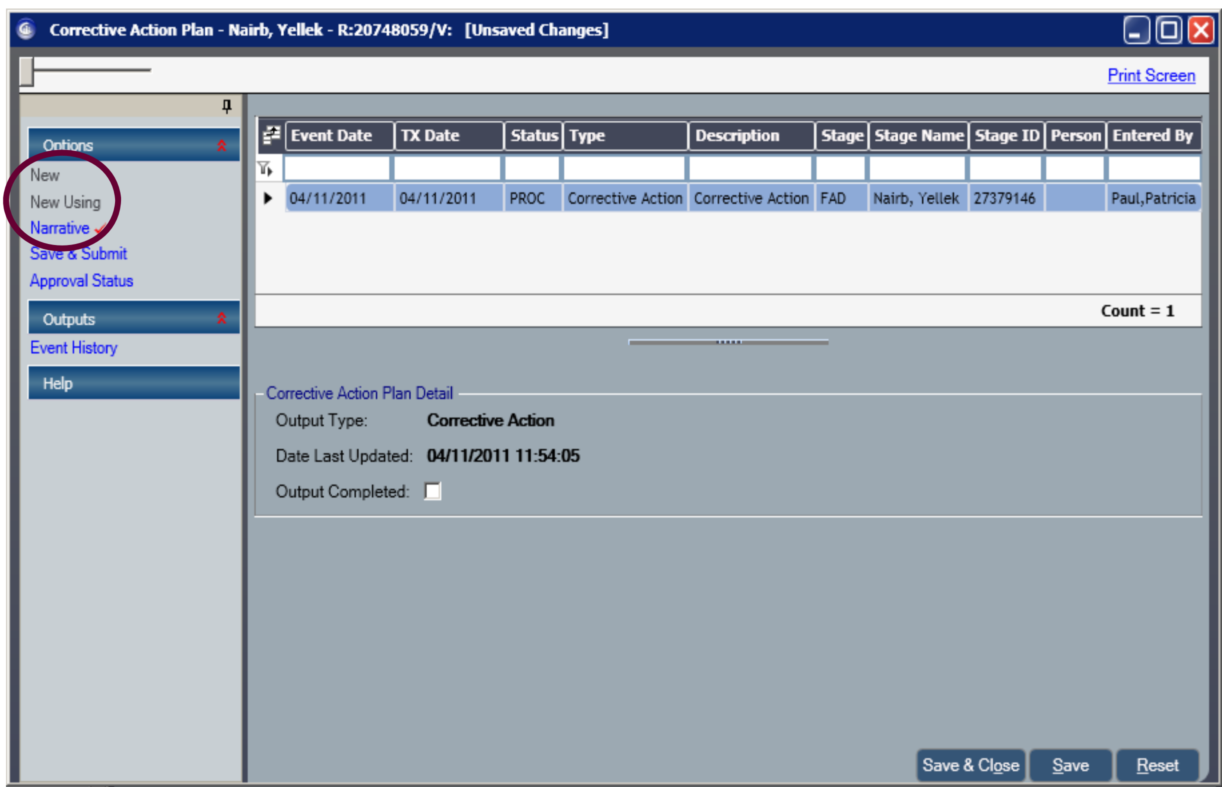


The Foster/Adoptive Home Stage

Corrective Action Plan, Serious Incident Report, Waiver/Exception

The **Serious Incident Report**, **Corrective Action Plan** and **Waiver/Exception** functions are all accessed via the **Stage Actions** section of the **NAVIGATION PANE**. Upon window entry, the respective report history list grid is displayed. This corresponds to the existing list when the report is selected on the Task List .

Each output design begins with a **Filtered Event List** to provide history and access to completed reports. Select the New link to start a new report or select a report from the event list and choose Narrative to edit one in progress. To reuse an existing version select New Using.



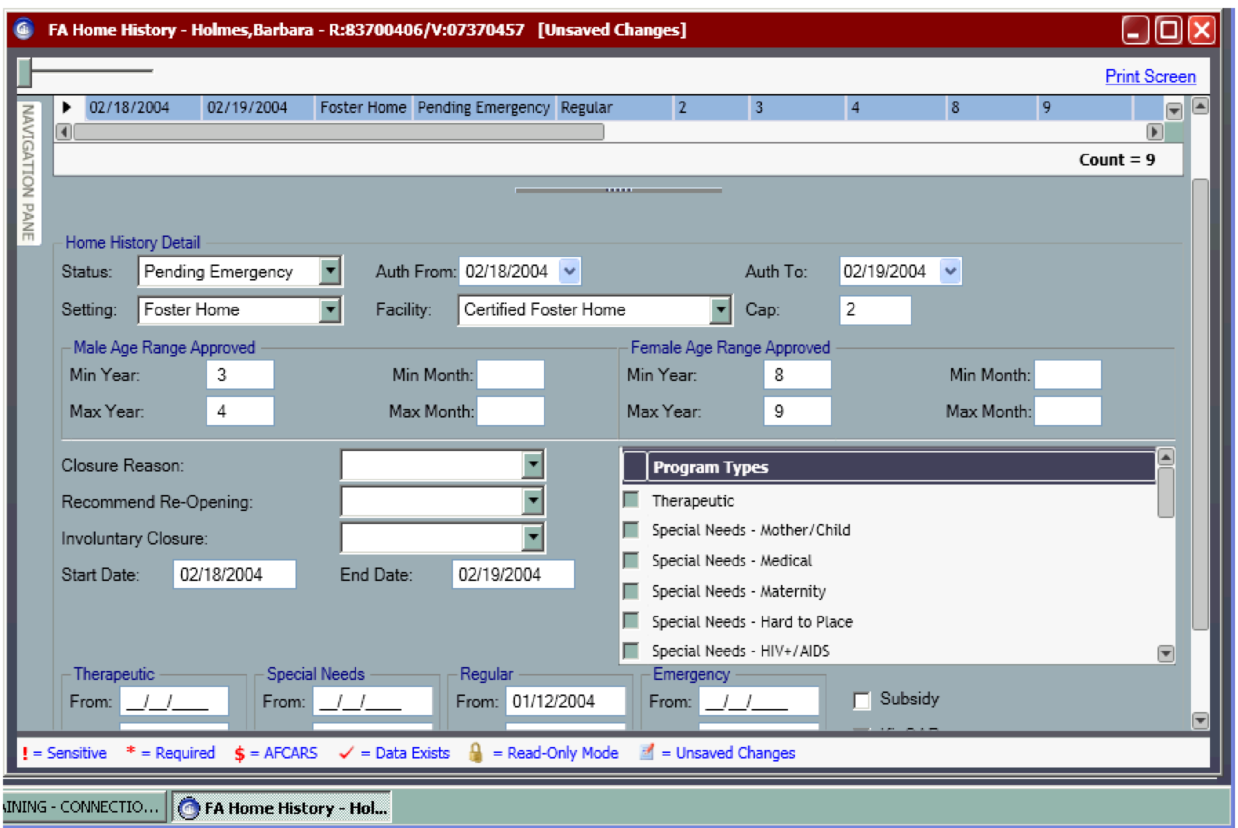
The Foster/Adoptive Home Stage

Home History

The **F/A Home History** window is accessed in one of two ways: Via a **F/A Home** Search by selecting a home in the **F/A Home List** and then selecting the F/A Home History link on **NAVIGATION PANE** or via the **Workload**, by selecting a FAD stage and then clicking the Home History link on **NAVIGATION PANE.**

Upon window entry, the **Filtered Event List** grid will be displayed. This corresponds to the former list when **View Home History** is selected on the Task List .

The **KinGAP** checkbox field, which is found on the lower right portion of the window after scrolling, will be active but protected.



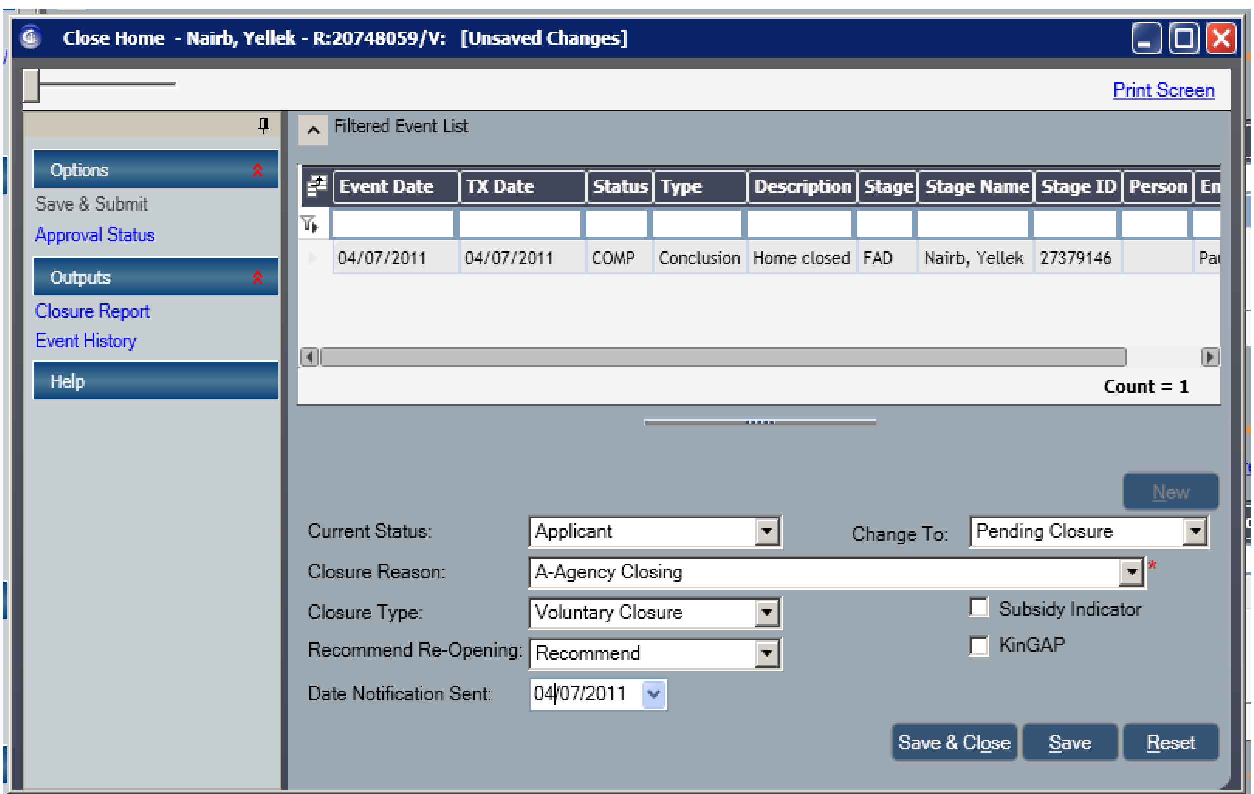
The Foster/Adoptive Home Stage

Close Home

The **Close Home** window is accessed via the **NAVIGATION PANE** under **Stage Actions**.

Upon window entry, the **Filtered Event List** grid will be displayed. This corresponds to the existing list when **Close Home** on the Task List is selected.

The new **KinGAP** checkbox field will be active but protected.



Windows Manager and Log Out

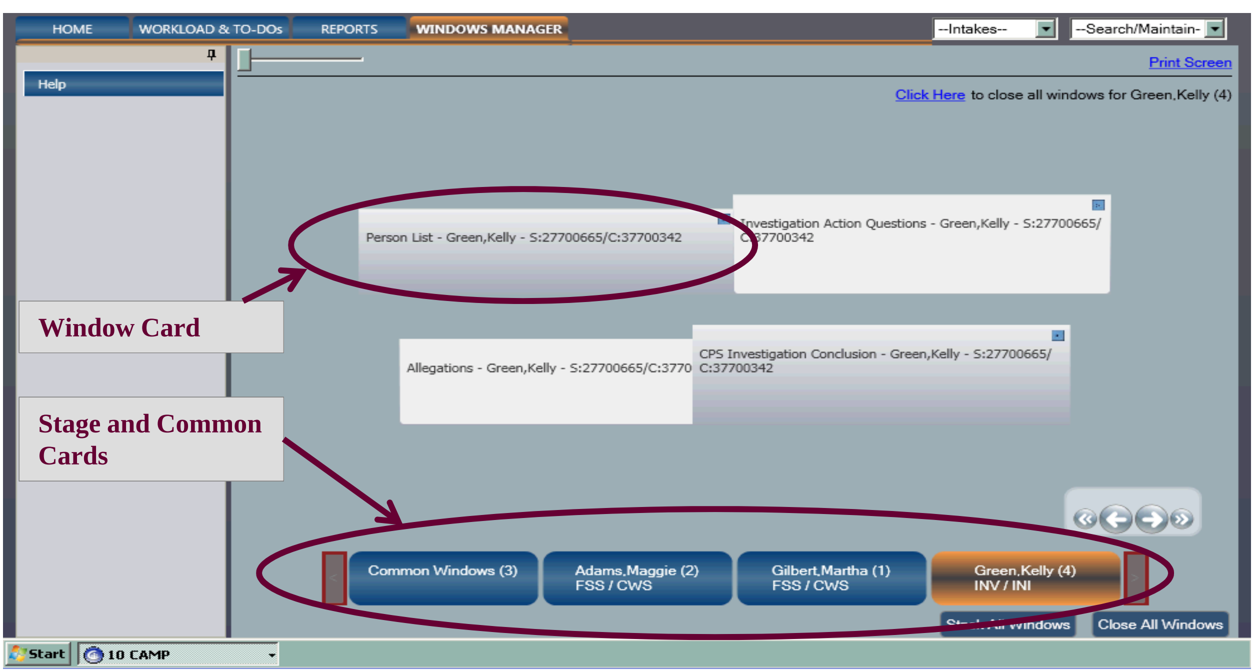
In the transformed system multiple stages and in some situations, multiple windows within stages can be open at the same time. The **WINDOWS MANAGER** tab on the toolbar keeps track of the windows and stages that are open.

The **Windows Manager** is made up of **Cards**. On the bottom of the window there are **Stage Cards,** one for each stage open and, if applicable, a single **Common Card** that pulls together all the common functions such as searches that are open. Each stage card displays stage information and the number of stage action windows that are open for the stage. Clicking on a stage card displays the window cards in the middle of the screen. The common card is labeled **Common Windows** and displays the number of common functions open.

Window Cards contain window information and have a label of 'Unsaved Changes' if applicable and an **X**. Selecting the window card will bring that window to focus. The window cards can be rotated or stacked.

Clicking on the **Close All Windows** button closes any open windows simultaneously. This feature will not work with certain windows, such as those in the CPRS and FSS or those with unsaved changes; these must be closed individually. Clicking on the **Yes** button on the message box displays the window to allow for changes to be saved or discarded.

Clicking on the Log Out link in upper right corner of the **Main Window** enables the user to exit CONNECTIONS. If an "unsaved changes" message displays, clicking on the **OK** button and navigating to the open window(s) to close them (or using the Windows Manager) permits log-out.



Appendix A:
Hot Keys and Copy/Paste

- The functionality of closing a window using the hotkey F3 is replaced on transformed windows with the “Esc” key. ALT + F4 remains available.
- All buttons have a unique hot key designated by a bolded and underlined letter. To select a button select the letter along with the CTRL key.
- All fields on transformed windows may be copied. To copy and paste using the mouse, right click and use CTRL+C for Copy, and CTRL+V for Paste. To copy information from an individual cell within a grid, highlighting the information and right clicking will display the dropdown menu with the Copy or Paste feature.

WORK AREA NAVIGATION

HOT KEY	USE TO:
Tab key	Move field to field within a tab or window
Shift + Tab	Reverse the tab path and return to previously selected field

NAVIGATION PANE

HOT KEY	USE TO:
Alt+ Underlined Letter (e.g. Alt + O)	Select a section of the NAVIGATION PANE
↓ ↑	Navigate through links in a section or to the next section
Tab key	Move to the next section header
Enter	Open a selected (highlighted)window
→	Return to the main work area

Appendix B:
Button Descriptions

Button controls on transformed windows have been improved to be more uniform. On some windows, new functionality has been added. The chart on the following two pages describes common button control functionality in the transformed system.

Button Name:	**Will Display On:**	**Enabled When:**	**Selecting Will:**
Save	• Main windows • Pop- up windows	An update has been made and all required fields are complete	• Display a validation message • If user validates, information is saved to the CONNX database • After save, window is refreshed to display changes
Modify	Windows with grids which allow for multiple lines of information to be recorded prior to save	An existing entry has been modified and required field are complete has been modified	• Display a validation message • If user validates, information is updated or removed from the grid • Information is saved to the CONNX database when the parent window is saved
Reset	• Main windows • Pop-up windows	An update has been made on a main or dependent window	• Display a message allowing the user to cancel or continue • If the user continues, changes are deleted without saving to the database • The window is refreshed
OK	• Main windows • Some secondary and pop-up windows	An update has been made and all required fields are complete	• Changes made to the window are accepted but not saved to the database until the parent window is saved
Add	Windows with grids which allow for multiple lines of information to be recorded prior to save	• Required information for a new entry is complete or • An existing entry has been modified and required fields are complete	• Display a validation message • If user validates, updated information is added to the grid • Information is saved to the CONNX database when the parent window is saved

Appendix B:
Button Descriptions

Button Name:	Will Display On:	Enabled When:	Selecting Will:
Modify	Windows with grids which allow for multiple lines of information to be recorded prior to save	An existing entry has been modified and required field are complete has been modified	• Display a validation message • If user validates, information is updated or removed from the grid • Information is saved to the CONNX database when the parent window is saved
Clear	• Main windows or pop- up windows with grids which allow for multiple lines of information to be recorded prior to save • Searches	Information has been selected or entered	• Clear all fields from a grid without saving to the database • For Searches, clear search criteria, search results, and any other information on the window and reset the left navigation. Note: the "Reset" button has been renamed 'Clear"
Search	• Main windows • Pop-up windows	After required search criteria has been entered	Query the database and display search results
Validate	On main windows and pop-up windows in association with address fields	After address information has been entered	• Display a validation message • If user validated, the Code 1 Validation pop up is then displayed for the user to accept or reject the address • After accept or reject, Save, Save and Close or Reset
Select	On sections of main windows or pop-up window that require selection from a grid	When a grid checkbox is selected	• Pass selected information to the parent window • Close the pop up window • Return the user to the parent window • Add the selected information to the parent window Note: replaces OK on some windows
Set End Date	On widows with address and phone information	A non-end dated address or phone number is selected	• End dates the selected information based on the current date • Enables Save, Save and Close or Reset.