

# 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.

**NAVIGATION PANE**

**CONNECTIONS Toolbar**

**Common Area**

**Main Work Area**

**Legend**

- ! 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

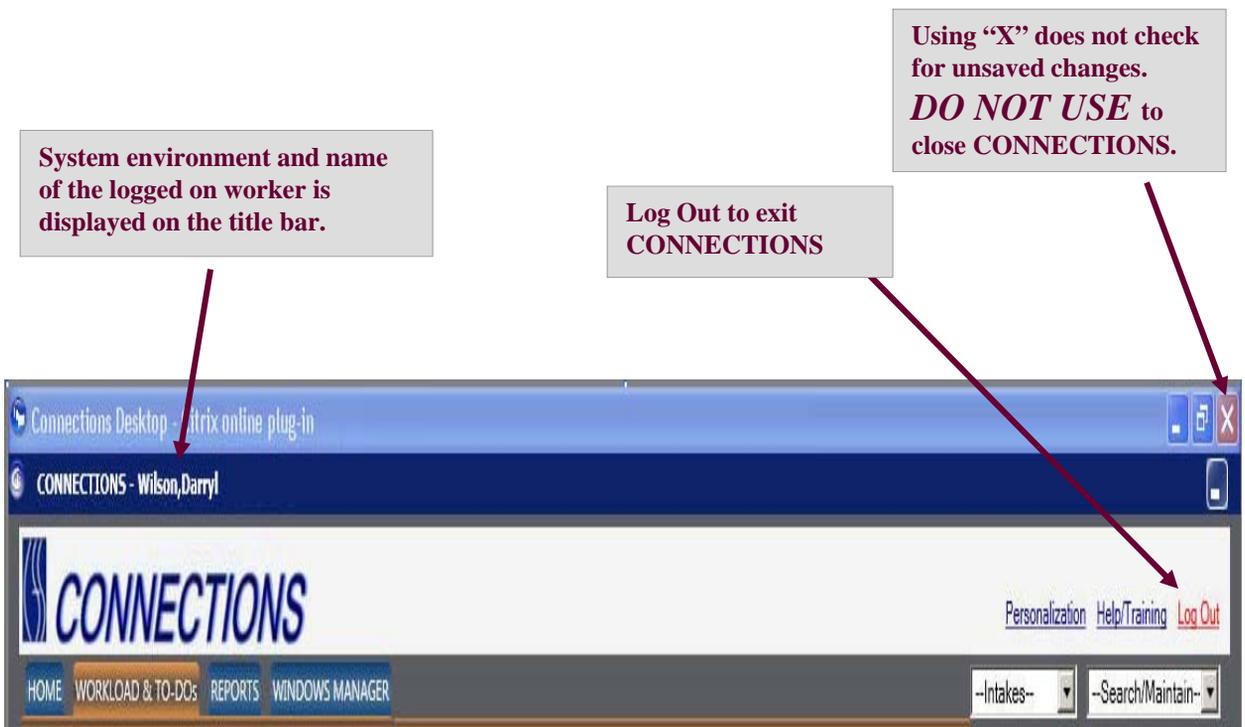
# Toolbar

## 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.



# Toolbar

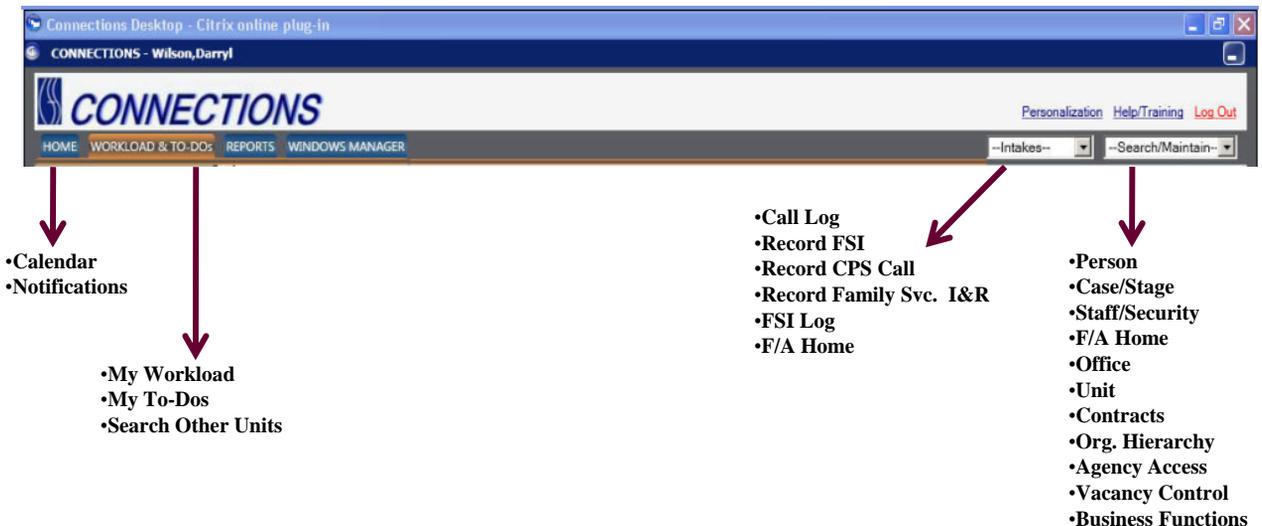
## Tabs and Drop-Down Menus

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.

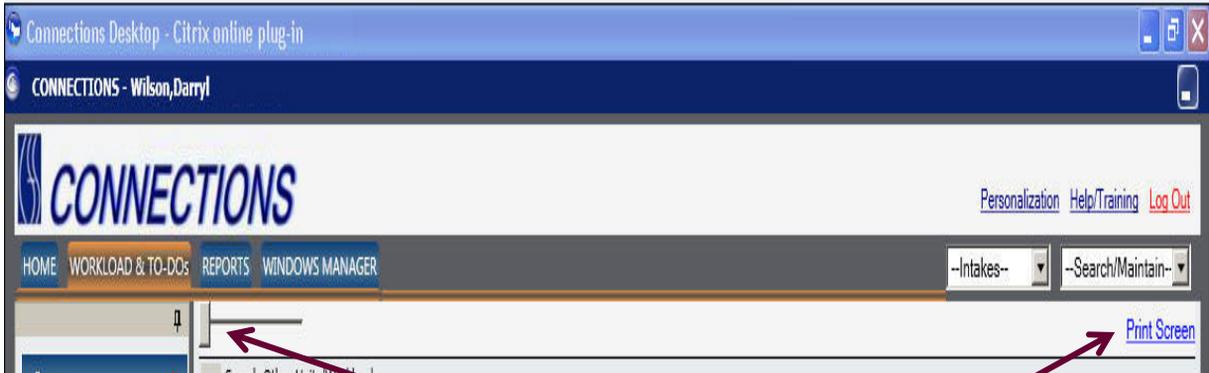
On the right side of the toolbar are drop-down menus for **Intakes** and **Search/Maintain**. All intake related functions have been grouped together and are accessed under the **Intakes** drop-down menu. The **Search/Maintain** drop down menu centralizes access to all search and maintenance functions. 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.



# Toolbar

## Zoom Control, Print Screen and Help/Training

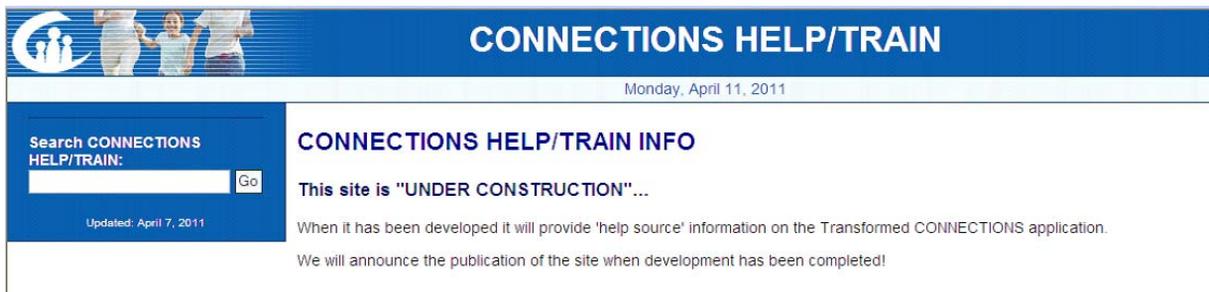


A common area supports **Zoom Control** and a link for Print Screen.

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.

The screenshot displays the CONNECTIONS application interface. The navigation pane on the left is partially expanded, showing sections like 'Common', 'Stage Actions', 'Outputs', and 'To Do Options'. A red circle highlights a pin icon in the navigation pane header, with a callout box stating: "The NAVIGATION PANE can be pinned or unpinned". Another red arrow points to the 'To Do Options' section, with a callout box stating: "Sections on the NAVIGATION PANE can be expanded or collapsed". The main content area shows a table of cases with columns: New, Stage Name, Stage, Type, Role, Stage ID, Case ID, County, Zone, Agency, Start Date, Assigned, and Unit. The table contains four rows of data, with the last row selected. Below the table, there is a 'Case To-Dos' section with a search filter and a table of tasks with columns: Type, Status, Date, Stage ID, Stage Name, Description, Assigned To, and Created By. The task table contains two rows of data.

	New	Stage Name	Stage	Type	Role	Stage ID	Case ID	County	Zone	Agency	Start Date	Assigned	Unit
<input type="checkbox"/>		Adams,Maggie	FSS	CWS	CP	24600416	34600218	031		A31	04/24/2009	04/24/2009	G56
<input type="checkbox"/>		Antonio,Maria	INV	INI	PR	20100797	30100398	031			03/13/2003	03/13/2003	G56
<input type="checkbox"/>		Antonio,Maria	INV	SUB	PR	20100799	30100398	031			03/14/2003	03/14/2003	G56
<input checked="" type="checkbox"/>		Collins,Kristy	FSS	CWS	CP	27200811	37200217	031		A31	04/24/2009	04/24/2009	G56

	Type	Status	Date	Stage ID	Stage Name	Description	Assigned To	Created By	
<input type="checkbox"/>	Navigate	T	NEW	07/02/2009	27200809	Collins,Kristy	Safety Assessment is due and must be submitted to Supervisor for approval.	DW	System
<input type="checkbox"/>	Navigate	T	NEW	08/04/2009	27200809	Collins,Kristy	Risk Assessment (RAP) is due and must be submitted to Supervisor for approval.	DW	System

# NAVIGATION PANE

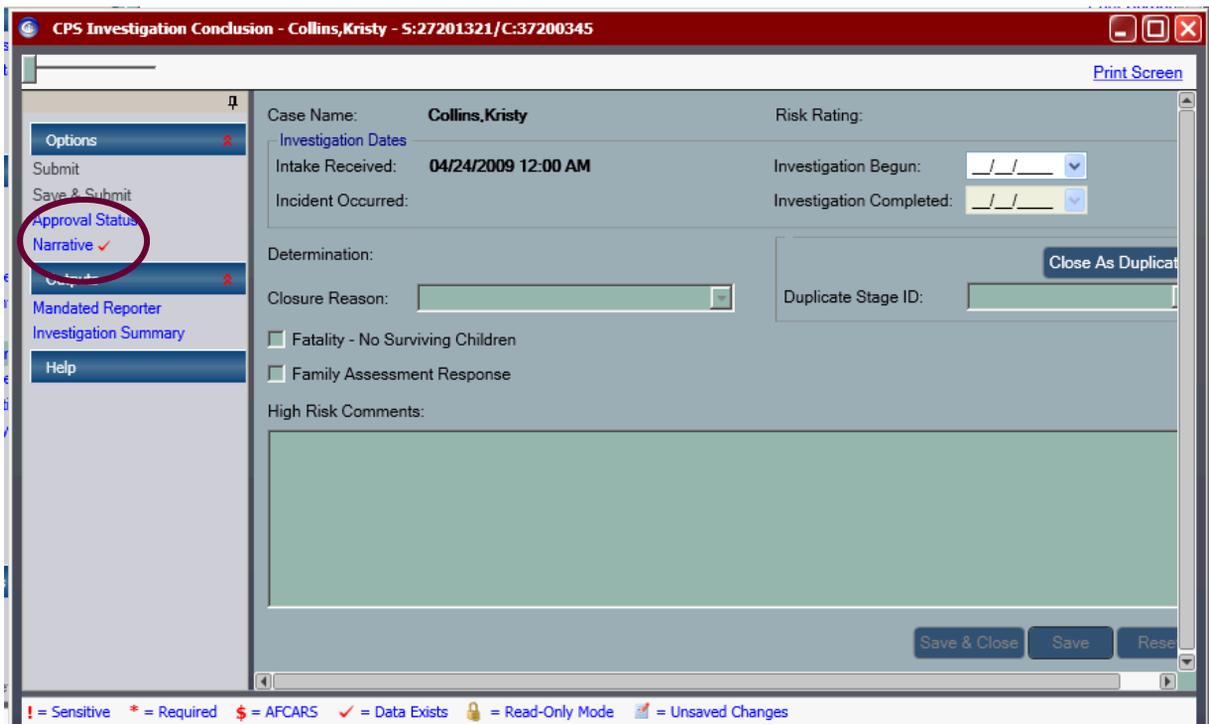
## Hyperlinks and Visual Cues

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.

The screenshot shows a software window titled "Case Summary - Gilbert, Martha - C:37500943". The main area displays a grid with columns: Merge, Stage Name, Type, PGM, Opened, Closed, SEC, Worker, Role, Phone, and Stage. The first row below the header is a filter row. A "Field Chooser" dialog is open, showing a list of fields with checkboxes: Merge (checked), Stage Name (checked), Stage (unchecked), Type (checked), County (unchecked), Zone (unchecked), CD (unchecked), PGM (checked), Opened (checked), and Closed (checked). A "Filter Icon" is highlighted in the top-left corner of the grid. A callout box points to the "Filter Icon" with the text "Filter Icon". Another callout box points to the "Merge" column header with the text "Click on a column header and drag it to a desired location". A third callout box points to the filter row under the "Merge" column with the text "Filter by clicking in the row under the column header and entering the desired value." The grid shows two rows of data. The bottom right of the grid displays "Count = 2 of 4". The status bar at the bottom indicates "Read-Only Mode" and "Unsaved Changes".

Merge	Stage Name	Type	PGM	Opened	Closed	SEC	Worker	Role	Phone	Stage
	Gilbert, Martha	CWS	CPS	09/10/2009			Wilson496, Darryl	Case Manager	27502	
	Gilbert, Martha	CWS	CPS	09/10/2009	09/10/2009		Wilson475, Darryl	Histor. Case Worker	27502	

# 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.

**Person List - Thompson, Lonnie - S:28300053/C:38300036**

Options: New Search, Add Person, Person Unrelate, Remove Person - Added in Error

Outputs: Person Data, Notice of Existence - English, Notice of Existence - Spanish, Notice of Indication - English, Notice of Indication - Spanish, 24 Hour Fatality Report, 30 Day Fatality Report

Person Info | Person Merge/Split | Case List

Detail | Address | Phone | AKA Names | Identifiers | Characteristics | Person Events

First: Lonnie M. Last: Thompson 36

Type: PRN \* Role: No Role Rel/Int: Mother \* FID: 18300076

Sex: Female \* Language: English \* Ethnicity: [dropdown]

Marital: [dropdown] Confirm PL:

Religion: [dropdown]

DOB: 03/01/1972 Approx DOB:  Age: 38

DOD: [dropdown] Approx DOD:  Reason: [dropdown]

Address Type: RS \* Primary:  Invalid:  Comments: [text area]

Street: 6 GLEN ST \*

PO Box/Apt: [text area]

Attn: [text area]

City: GRANVILLE \* State: NY Zip: 12832-1004 Start Date: 3/15/2010

County: WASHINGTON CD: [text area] Validate End Date: [text area] Set End Date

Phone Number: (518) 555-9876 Ext: [text area] Type: RS

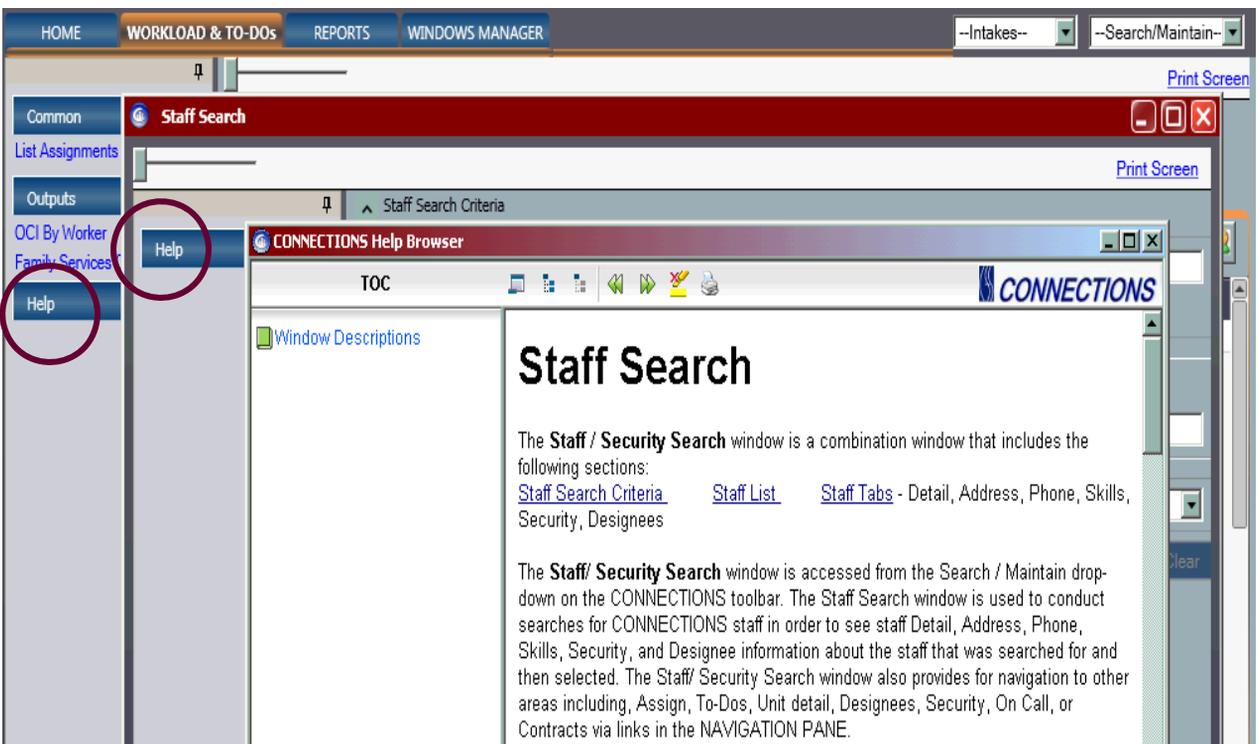
! = Sensitive \* = Required \$ = AFCARS ✓ = Data Exists 🔒 = Read-Only Mode 📄 = Unsaved Changes

**Required Fields have an Asterisk\***

# 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.

The screenshot displays the CONNECTIONS application interface. At the top, there is a navigation bar with tabs for HOME, WORKLOAD & TO-DOs, REPORTS, and WINDOWS MANAGER. Below the navigation bar, there is a calendar for January 2011. The date 10 is highlighted in a red box. Below the calendar, there is a section titled "Notifications" which contains the text "There are no Notifications for this time period." A red oval highlights this text. To the right of the notifications section, there is a horizontal line with a red arrow pointing to it, and a text box that says "Drag the section break up or down to minimize or maximize the section." At the bottom of the page, there is a mission statement for the Office of Children and Family Services.

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Today: 1/10/2011

Notifications

There are no Notifications for this time period.

Drag the section break up or down to minimize or maximize the section.

Mission Statement: The Office of Children and Family Services serves New York's public by promoting the safety, permanency and well-being of our children, families and communities. We will achieve results by setting and enforcing policies, building partnerships, and funding and providing quality services.

# 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.

**Search Other Units/Workloads replaces the UNIT button**

**Last Refreshed Display**

**Default display of NAVIGATION PANE upon window entry**

ID	County	Zone	Agency	Start Date	Assigned	Unit
24600416	031		A31	04/24/2009	04/24/2009	G56
20100797	031			03/13/2003	03/13/2003	G56
20100799	031			03/14/2003	03/14/2003	G56
27200811	031	A31		04/24/2009	04/24/2009	G56
27200809	031			04/24/2009	04/24/2009	G56
20500799	031			02/18/2003	02/18/2003	G56
27500994	031	A31		09/10/2009	09/10/2009	G56
27500995	031	A31		09/10/2009	09/10/2009	G56
25800785	031			03/03/2009	03/03/2009	G56
25800787	031			03/03/2009	03/03/2009	G56
27700409	031			09/22/2009	09/22/2009	G56
20900399	031			04/29/2003	04/29/2003	G56
26000887	031	A31		09/30/2004	09/30/2004	G56
25300801	031			01/29/2009	01/30/2009	G56
25300803	031			01/30/2009	01/30/2009	G56
20300807	031			02/14/2003	02/14/2003	G56
21200221	031			09/03/2003	09/03/2003	G56
24900413	031			09/28/2004	10/02/2004	G56
22200221	031			09/03/2003	09/03/2003	G56

Count = 28

# Personalization

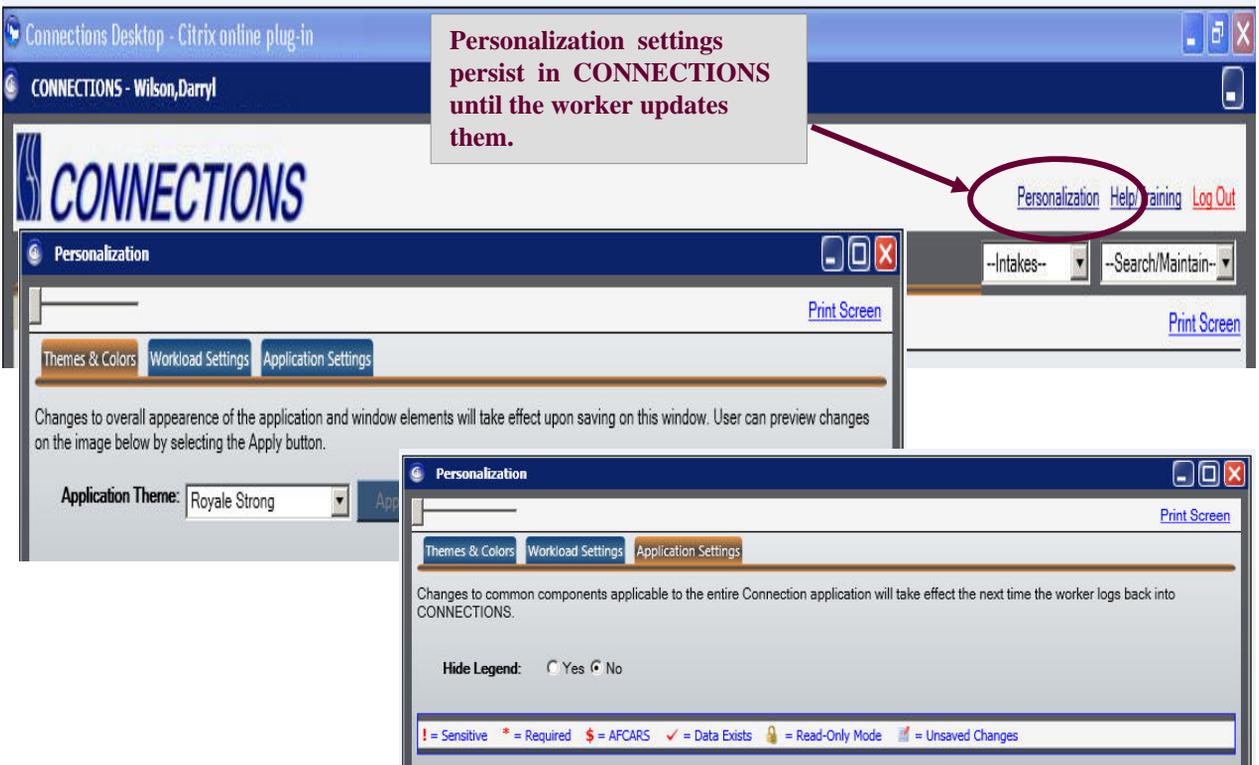
The [Personalization](#) link accesses a window used to customize the display or the workload and some other window elements. Personalized settings apply only to a worker's own workload, not to other workloads that worker may access. Changes made through Personalization will remain in effect from session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



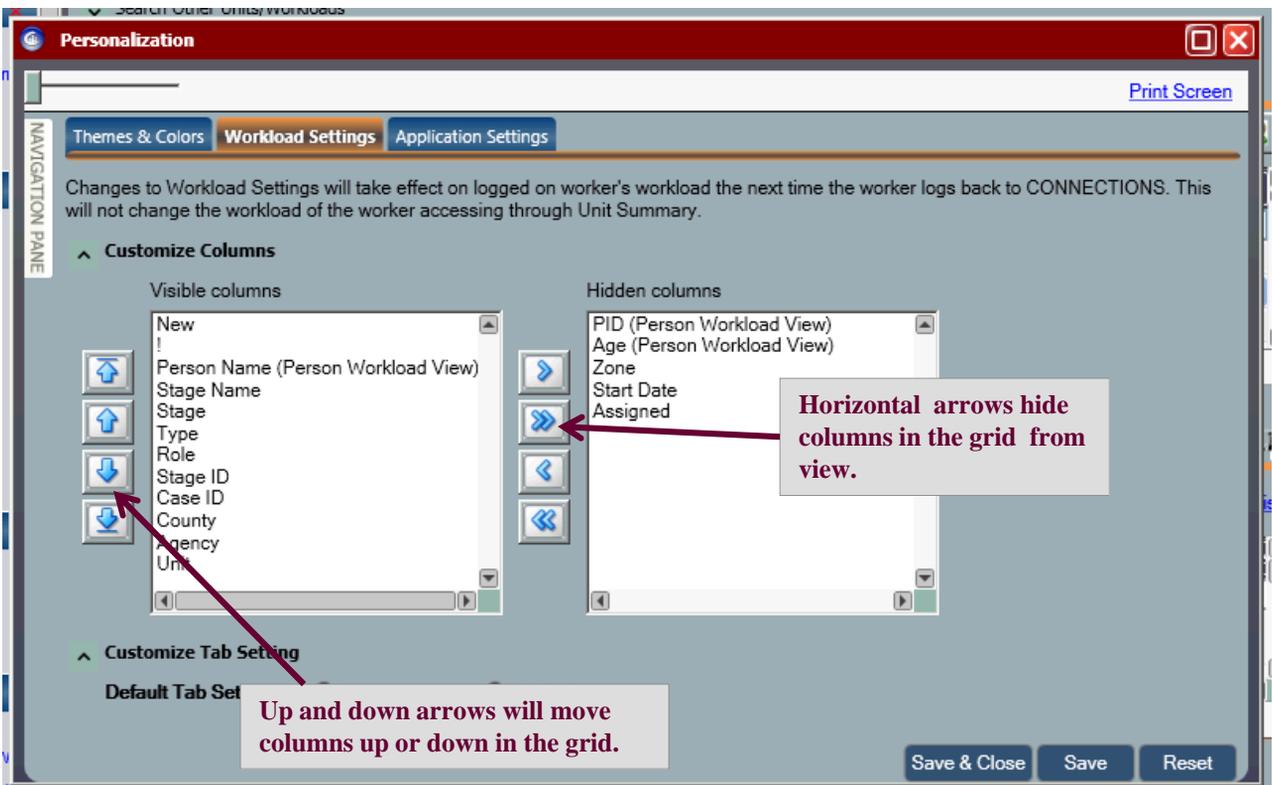
# Personalization

## 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.

The screenshot displays the CONNECTIONS web application interface. The main content area shows a workload grid with columns: New, Stage Name, Stage, Type, Role, Stage ID, Case ID, County, Zone, Agency, Start Date, Assigned, and Unit. The grid contains four rows of data, with the last row (Collins, Kristy) selected. A callout box with the text "Select Stage or Person view." has an arrow pointing to a "refresh" button in the top right corner of the grid area. Below the main grid is a "Case To-Dos" section with a "Stage Events" sub-section, which contains a table with columns: Type, Status, Date, Stage ID, Stage Name, Description, Assigned To, and Created By. The bottom of the interface features a legend with icons for Sensitive, Required, APCARS, Data Exists, Read-Only Mode, and Unsaved Changes.

	New	Stage Name	Stage	Type	Role	Stage ID	Case ID	County	Zone	Agency	Start Date	Assigned	Unit
<input type="checkbox"/>		Adams, Maggie	FSS	CWS	CP	24600416	34600218	031		A31	04/24/2009	04/24/2009	G56
<input type="checkbox"/>		Antonio, Maria	INV	INI	PR	20100797	30100398	031			03/13/2003	03/13/2003	G56
<input type="checkbox"/>		Antonio, Maria	INV	SUB	PR	20100799	30100398	031			03/14/2003	03/14/2003	G56
<input checked="" type="checkbox"/>		Collins, Kristy	FSS	CWS	CP	27200811	37200217	031		A31	04/24/2009	04/24/2009	G56

	Type	Status	Date	Stage ID	Stage Name	Description	Assigned To	Created By
<input type="checkbox"/>	Navigate	T	NEW	07/02/2009	27200809	Collins, Kristy	DW	System
<input type="checkbox"/>	Navigate	T	NEW	08/04/2009	27200809	Collins, Kristy	DW	System

# 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.

The screenshot shows the CONNECTIONS software interface. The top navigation bar includes 'HOME', 'WORKLOAD & TO-DOS', 'REPORTS', and 'WINDOWS MANAGER'. The main content area is titled 'My Workload' and 'My To Dos'. A search bar is present with a dropdown menu for 'Children:' showing options: 'Placed', 'Associated', and 'Tracked'. The 'Placed' option is selected. Below the search bar is a table with the following columns: New, PID, Age, Stage Name, Stage, Type, Role, Stage ID, Case ID, County, Zone, Agency, Start Date, Assigned, and Unit. The table contains several rows of child records.

New	PID	Age	Stage Name	Stage	Type	Role	Stage ID	Case ID	County	Zone	Agency	Start Date	Assigned	Unit
	Collins,Patrick	17200652	16	Collins,Kristy	FSS	CWS	CP	27200383	37200110	031	A31	04/24/2009	04/24/2009	E62
	Collins,Kimberly	17200653	8	Collins,Kristy	FSS	CWS	CP	27200383	37200110	031	A31	04/24/2009	04/24/2009	E62
	Collins,Tyler	17200654	1	Collins,Kristy	FSS	CWS	CP	27200383	37200110	031	A31	04/24/2009	04/24/2009	E62
	Gilbert,Sam	17500457	1	Gilbert,Sam	FSS	CCR	CP	27500460	37500184	031	A31	09/10/2009	09/10/2009	E63
	Harrison,Peter	16000733	21	Harrison,Kathy	FSS	CWS	CP	26000455	36000213	031	A31	09/30/2004	09/30/2004	F63
	Harrison,Karen	16000734	13	Harrison,Kathy	FSS	CWS	CP	26000455	36000213	031	A31	09/30/2004	09/30/2004	F63
	Harrison,Turner	16000735	6	Harrison,Kathy	FSS	CWS	CP	26000455	36000213	031	A31	09/30/2004	09/30/2004	F63

# 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 refresh list link.

The screenshot shows the CONNECTIONS desktop application interface. The top navigation bar includes 'HOME', 'WORKLOAD & TO-DOs', 'REPORTS', and 'WINDOWS MANAGER'. The 'WORKLOAD & TO-DOs' tab is active. Below the navigation bar, there are search and filter options: '-Intakes--' and '--Search/Maintain--'. The main content area is titled 'My Workload' and 'My To-Dos'. A red circle highlights the 'Last Refresh: 1/10/2011 7:45:58 PM' text. Another red circle highlights the 'refresh list' link. Below this, there is a table with columns: New, Stage Name, Stage, Type, Role, Stage ID, Case ID, County, Zone, Agency, Start Date, Assigned, and Unit. The table contains five rows of workload data.

	New	Stage Name	Stage	Type	Role	Stage ID	Case ID	County	Zone	Agency	Start Date	Assigned	Unit
<input type="checkbox"/>		Adams,Maggie	FSS	CWS	CP	24600416	34600218	031		A31	04/24/2009	04/24/2009	G56
<input type="checkbox"/>		Antonio,Maria	INV	INI	PR	20100797	30100398	031			03/13/2003	03/13/2003	G56
<input type="checkbox"/>		Antonio,Maria	INV	SUB	PR	20100799	30100398	031			03/14/2003	03/14/2003	G56
<input type="checkbox"/>		Collins,Kristy	FSS	CWS	CP	27200811	37200217	031		A31	04/24/2009	04/24/2009	G56
<input type="checkbox"/>		Collins,Kristy	INV	INI	PR	27200809	37200217	031			04/24/2009	04/24/2009	G56

# 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 My To-Dos

Last Refresh: 12/15/2010 9:51:01 AM

<input type="checkbox"/>	New	!	Stage Name	Stage	Type	Role	Stage
<input type="checkbox"/>	Y		Antonio, Maria	FSI	CWS	CW	29400
<input type="checkbox"/>			Adams, Maggie	FSS	CWS	CP	24600
<input type="checkbox"/>			Antonio, Maria	INV	INI	PR	20100
<input type="checkbox"/>			Antonio, Maria	INV	SUB	PR	20100
<input type="checkbox"/>			Collins, Kristy	FSS	CWS	CP	27200
<input type="checkbox"/>			Collins, Kristy	INV	INI	PR	27200

Multi-Select box - Multiple records can be selected, solely for the purpose or Re-Assignment, using the Select checkbox

# 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**.

The screenshot displays the 'CONNECTIONS' web application interface. The top navigation bar includes 'HOME', 'WORKLOAD & TO-DOs', 'REPORTS', and 'WINDOWS MANAGER'. The left sidebar contains various menu items such as 'Common', 'Stage Actions', 'Outputs', and 'To Do Options'. The main content area shows a 'My Workload' tab with a table of cases. A callout box points to the 'Case To-Dos' and 'Stage Events' sub-tabs, stating: 'Case To-Do's and Stage Events display for a selected stage.' Below this, the 'Case To-Dos' sub-tab is active, showing a search range from '02/09/2011' and a table of tasks. A second callout box points to the 'Detail' link in the 'To Do Options' menu, stating: 'To view Detail of a To Do, highlight it in the grid and select the Detail link'. The status bar at the bottom indicates various system settings like 'Sensitive', 'Required', 'AFCARS', etc.

New	Person Name	PID	Age	Stage Name	Stage	Type	Role	Stage ID	Case ID	County	Zone	Agency	Start Date	Assigned	Unit
	Evans, Anthony	10101197	49	Antonio, Maria	INV	SUB	PR	20100799	30100398	031			03/14/2003	03/14/2003	G56
	Collins, Kristy	17201399	31	Collins, Kristy	FSS	CWS	CP	27200811	37200217	031		A31	04/24/2009	04/24/2009	G56
	Collins, Thomas	17201400	40	Collins, Kristy	FSS	CWS	CP	27200811	37200217	031		A31	04/24/2009	04/24/2009	G56
	Collins, Patrick	17201401	16	Collins, Kristy	FSS	CWS	CP	27200811	37200217	031		A31	04/24/2009	04/24/2009	G56

Type	Status	Date	Stage ID	Stage Name	Description	Assigned To	Created By	
<input type="checkbox"/> Navigate	T	NEW	07/02/2009	27200809	Collins, Kristy	Safety Assessment is due and must be submitted to Supervisor for approval.	DW	System
<input type="checkbox"/> Navigate	T	NEW	08/04/2009	27200809	Collins, Kristy	Risk Assessment (RAP) is due and must be submitted to Supervisor for approval.	DW	System

# 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 refresh list link on the window.

The screenshot shows the CONNECTIONS software interface. The top navigation bar includes 'HOME', 'WORKLOAD & TO-DOS', 'REPORTS', and 'WINDOWS MANAGER'. The 'My To-Dos' tab is highlighted with a red circle. Below the navigation bar, there is a search bar and a date range selector (From: / / To: 02/09/2011). The main content area displays a table of tasks with the following columns: Type, Status, Date, Case Name, Stage ID, Stage Name, Description, and Created By. The table contains 15 rows of data, each representing a task assigned to a worker. The tasks are listed in chronological order from top to bottom.

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.



This screenshot shows the 'Search Other Units/Workloads' search results page in the CONNECTIONS application. The search criteria are: Agency: A31, Site: 3Q1, Zone: (empty), Unit: G60. The search results are displayed in a table with columns: Name, Primary, Secondary, Case Mgr, Case Plnr, Case Wkr, CPS W/M, and Total Case. The results show two cases: May206, Sally and Wilson206, Darryl. The count is 2. Below the search results, there are tabs for 'Workload' and 'To Dos' for Wilson206, Darryl. The 'To Dos' tab is selected, showing a list of tasks with columns: New, Stage Name, Stage, Type, Role, Stage ID, Case ID, County, Zone, Agency, Start Date, Assigned, and Unit. The results show three tasks: Adams, Maggie; Antonio, Maria; and Antonio, Maria. The count is 28.

Name	Primary	Secondary	Case Mgr	Case Plnr	Case Wkr	CPS W/M	Total Case
May206, Sally							
Wilson206, Darryl	22			6			19

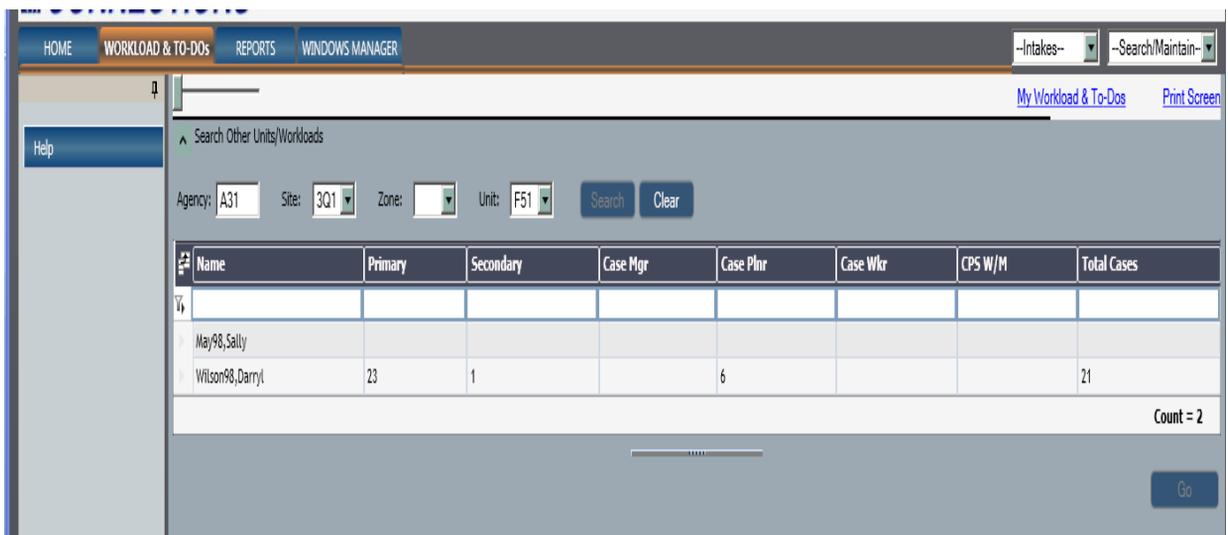
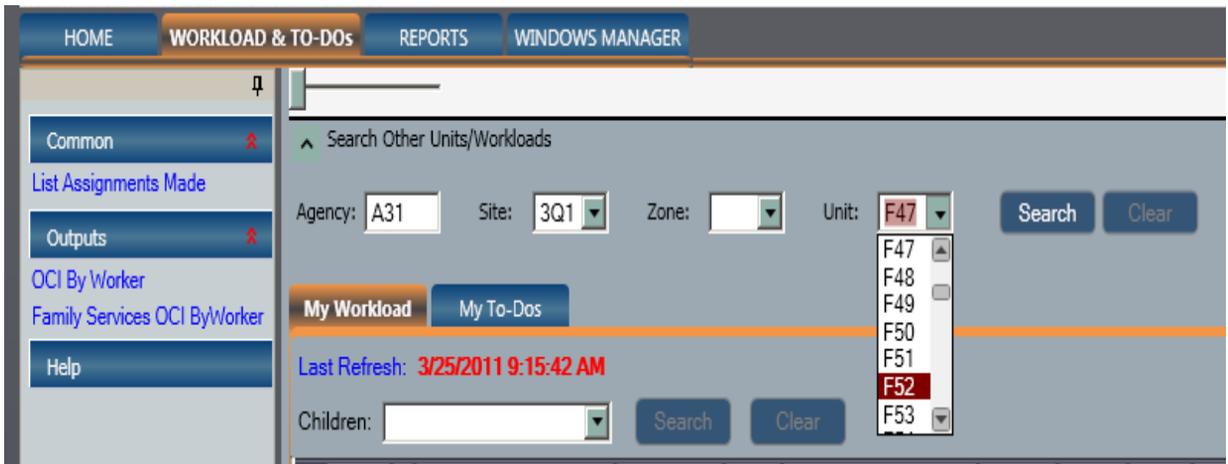
New	Stage Name	Stage	Type	Role	Stage ID	Case ID	County	Zone	Agency	Start Date	Assigned	Unit
<input type="checkbox"/>	Adams, Maggie	FSS	CWS	CP	24600424	34600222	031		A31	04/24/2009	04/24/2009	E63
<input checked="" type="checkbox"/>	Antonio, Maria	INV	INI	PR	20100813	30100406	031			03/13/2003	03/13/2003	F64
<input type="checkbox"/>	Antonio, Maria	INV	SUB	PR	20100815	30100406	031			03/14/2003	03/14/2003	F64

# 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 My Workload & To-Dos link returns the view to a refreshed view of the worker's own workload and To-Dos.

**A worker returns to her/his own workload by selecting the My Workload & To-Dos link**

**The name of the selected worker appears on the tabs**

**Choose "Go" once a worker is selected from the grid.**

Agency: A31 Site: 3Q1 Zone: Unit: F51 Search Clear

Name	Primary	Secondary	Case Mgr	Case Plnr	Case Wkr	CPS W/M	Total Cases
May98,Sally							
Wilson98,Darryl	23	1		6			21

Count = 2

Workload: Wilson98,Darryl To Dos: Wilson98,Darryl

Last Refresh: 3/25/2011 9:21:20 AM refresh list

New	Stage Name	Stage	Type	Role	Stage ID	Case ID	County	Zone	Agency	Start Date	Assigned	Unit
<input type="checkbox"/>	Gray, April	INV	SUB	SE	25800387	35800192	031			03/03/2009	03/06/2010	F54
<input type="checkbox"/>	Adams, Maggie	FSS	CWS	CP	24600210	34600115	031		A31	04/24/2009	04/24/2009	E63
<input type="checkbox"/>	Antonio, Maria	INV	INI	PR	20100389	30100194	031			03/13/2003	03/13/2003	F64
<input type="checkbox"/>	Antonio, Maria	INV	SUB	PR	20100391	30100194	031			03/14/2003	03/14/2003	F64
<input type="checkbox"/>	Collins, Kristy	FSS	CWS	CP	27200399	37200114	031		A31	04/24/2009	04/24/2009	E62
<input type="checkbox"/>	Collins, Kristy	INV	INI	PR	27200397	37200114	031			04/24/2009	04/24/2009	E62
<input type="checkbox"/>	Connors, Sandra	INV	INI	PR	20500391	30500195	031			02/18/2003	02/18/2003	F64
<input type="checkbox"/>	Gilbert, Martha	FSS	CWS	CP	27500479	37500191	031		A31	09/10/2009	09/10/2009	E63
<input type="checkbox"/>	Gilbert, Sam	FSS	CCR	CP	27500480	37500192	031		A31	09/10/2009	09/10/2009	E63
<input type="checkbox"/>	Gray, April	INV	INI	PR	25800373	35800186	031			03/03/2009	03/03/2009	E62

# 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.

DEVTRAIN - CONNECTIONS - Wilson, Darryl

CONNECTIONS

Personalization Help/Training Log Out

HOME WORKLOAD & TO-DOs **REPORTS** WINDOWS MANAGER

--Intakes-- --Search/Maintain--

Print Screen

refresh list

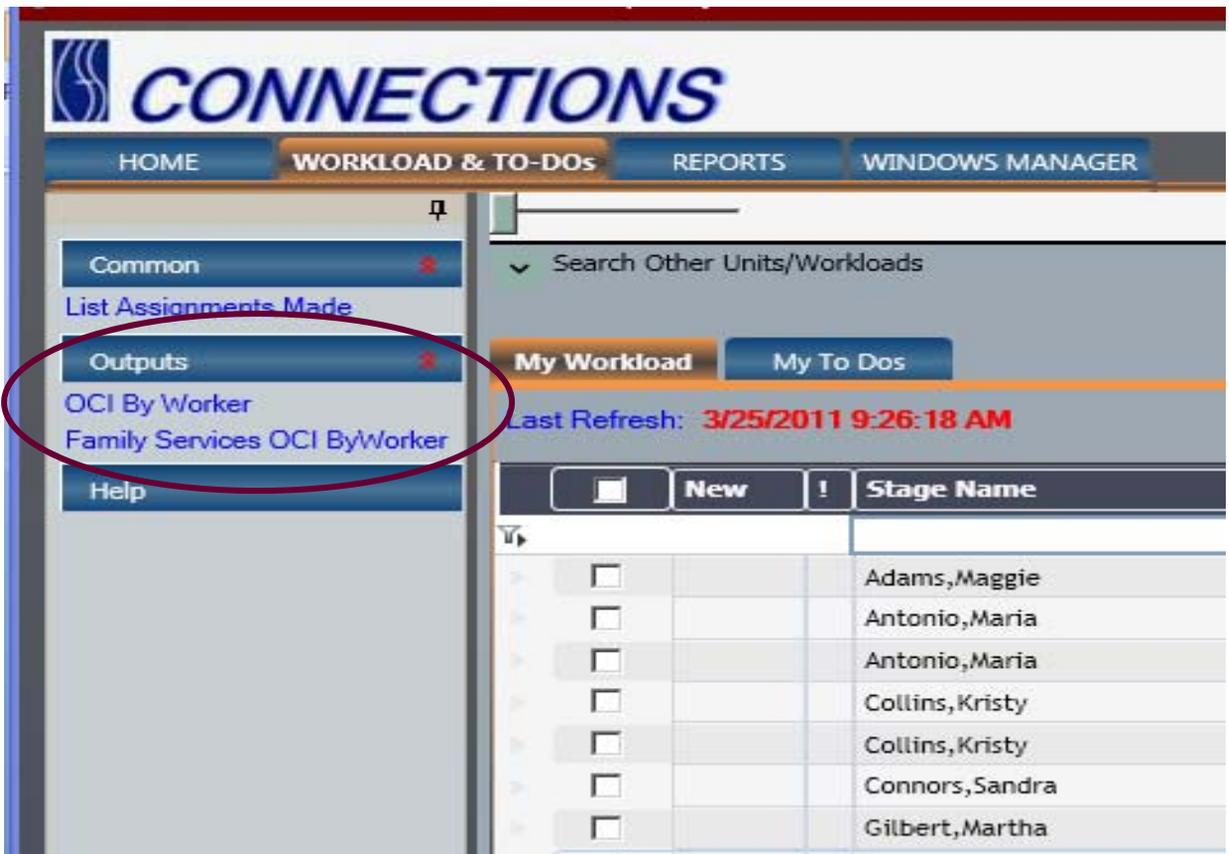
Status	Report Name	Report Description	Gen Date	Purge Date	Output
Done	Family Services Workload Report	FS OCI by Worker - Wilson, Darryl	01/10/2011	01/17/2011	W
Done	Irtake - IRI Reports	INT/IRI Rpt: 25300801, Hill, Jean	01/10/2011	01/17/2011	W
Done	Irtake - IRI Reports	INT/IRI Rpt: 25300801, Hill, Jean	01/10/2011	01/17/2011	W
Done	Irtake - IRI Reports	INT/IRI Rpt: 25300801, Hill, Jean	01/10/2011	01/17/2011	W
Done	Irtake - IRI Reports	INT/IRI Rpt: 25300801, Hill, Jean	01/10/2011	01/17/2011	W
Done	Irtake - IRI Reports	INT/IRI Rpt: 25300801, Hill, Jean	01/10/2011	01/17/2011	W
Done	Prior Case Summary Report	Stage Name: Hill, Jean	01/10/2011	01/10/2011	W

Count = 7

# 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.



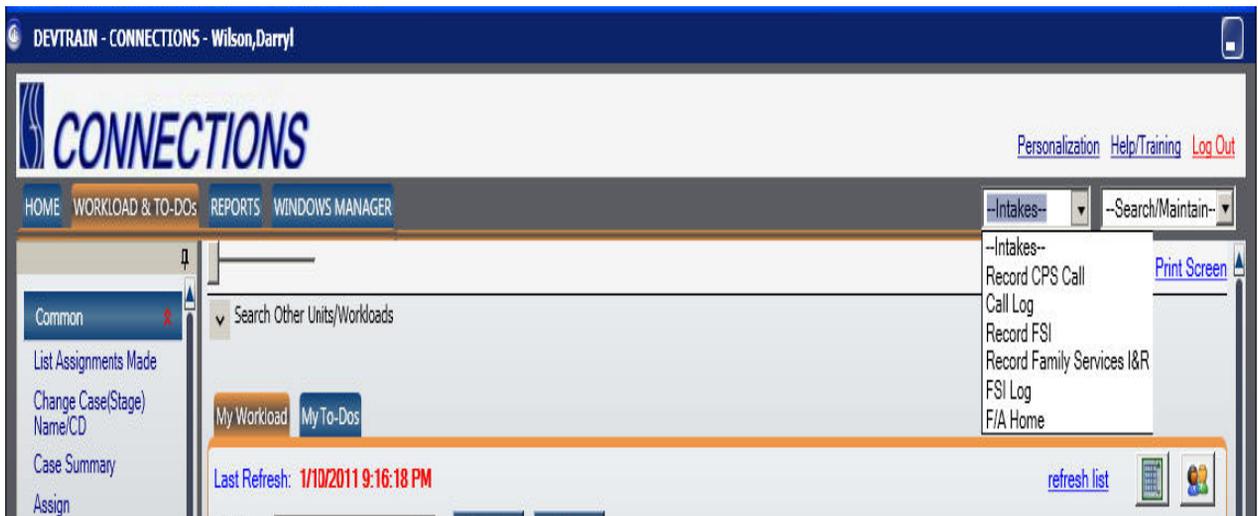
The screenshot displays the CONNECTIONS web application interface. The top navigation bar includes links for HOME, WORKLOAD & TO-DOs, REPORTS, and WINDOWS MANAGER. The left navigation pane contains several menu items: Common, List Assignments Made, **Outputs** (circled in red), OCI By Worker, Family Services OCI ByWorker, and Help. The main content area features a search bar for other units/workloads, buttons for My Workload and My To Dos, and a last refresh timestamp of 3/25/2011 9:26:18 AM. Below this is a table with a 'New' button and a 'Stage Name' column. The table lists several workers with checkboxes in the first column.

	New	!	Stage Name
<input type="checkbox"/>			Adams, Maggie
<input type="checkbox"/>			Antonio, Maria
<input type="checkbox"/>			Antonio, Maria
<input type="checkbox"/>			Collins, Kristy
<input type="checkbox"/>			Collins, Kristy
<input type="checkbox"/>			Connors, Sandra
<input type="checkbox"/>			Gilbert, Martha

# 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**.

The screenshot shows the 'Call Log' application window. On the left is a navigation pane with 'Options', 'Call Summary', 'Transmission Log', and 'Help'. The main area is titled 'Search Criteria' and contains several input fields: First, M, Last, Classification, Person Type, Call ID, Zone, City, County, Ack Type, Date/Time From, Date/Time To, Call Status, and Unit #. There are 'Monitor', 'Search', and 'Clear' buttons. Below the search criteria is a table with columns: Case ID, Ack, Assigned To, Assigned County, Call ID, and Case Name. The table contains five rows of data. At the bottom right of the table area, it says 'Count = 30'. At the very bottom of the window, there is a status bar with icons and text: '! = Sensitive \* = Required \$ = AFCARS ✓ = Data Exists 🔒 = Read-Only Mode 📄 = Unsaved Changes'.

Case ID	Ack	Assigned To	Assigned County	Call ID	Case Name
33100000	N	Wilson169,Darryl	ONONDAGA	23100000	Snow, T
33100001	N	Wilson170,Darryl	ONONDAGA	23100001	Snow, T
33100002	N	Wilson171,Darryl	ONONDAGA	23100002	Snow, T
33100003	N	Wilson172,Darryl	ONONDAGA	23100003	Snow, T
33100004	N	Wilson173,Darryl	ONONDAGA	23100004	Snow, T
33100005	N	Wilson174,Darryl	ONONDAGA	23100005	Snow, T

# 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.

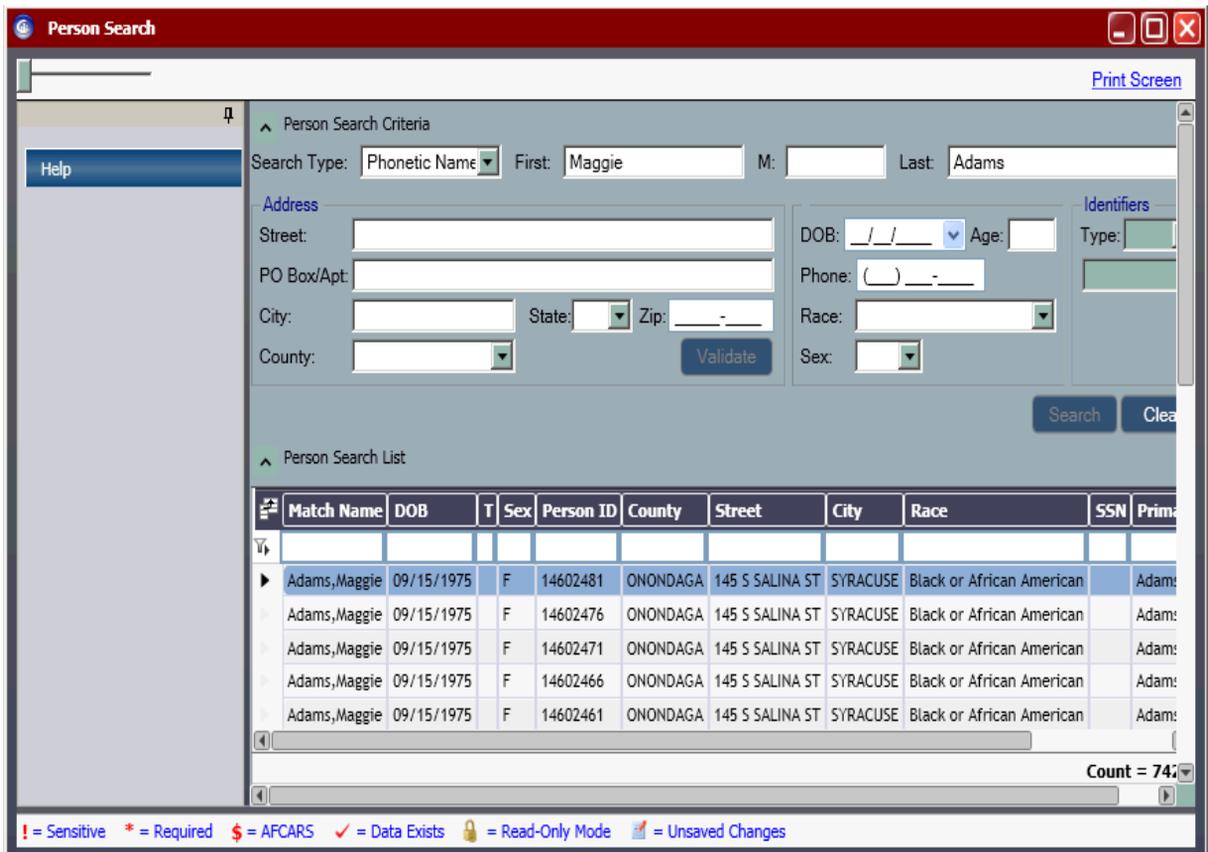
This Job Aid will highlight the changes made to the most commonly used search processes, Person, and Case Search. Changes that have been made in these transformed search windows can be applied to all transformed search functionality.

The screenshot displays the CONNECTIONS web application interface. At the top, there is a navigation bar with tabs for HOME, WORKLOAD & TO-DOs, REPORTS, and WINDOWS MANAGER. A search bar is present with a dropdown menu currently set to "--Intakes--". The "Search/Maintain" dropdown menu is open, listing various search options: Person, Case/Stage, Staff/Security, F/A Home, Resource, Office, Unit, Contracts, On-Call, Org. Hierarchy, Agency Access, Agency Control, and Business Function. The main content area shows a search results table with columns: New, Stage Name, Stage, Type, Role, Stage ID, Case ID, County, Zone, Agency, Start Date, and Assigned. A table row is visible with the following data: Δromatic Masoia, FSS, CIVS, CP, 2460007, 2460011, 031, 331, 04/24/2009, 04/24/2009.

# 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.

Person List - Collins, Kristy - S:27201829/C:37200472

Case Name: **Collins, Kristy** Stage: **INV**

Name	M/S	Sch	DOB	Approx	Sex	Type	Role	Rel/Int	Person ID	Date Added
Collins, Kristy		V	02/19/1979		F	PRN	AS	Mother	17203184	04/24/2009
Collins, Thomas		V	11/24/1970		M	PRN	AS	Biological Father	17203185	04/24/2009
Collins, Patrick		V	04/22/1994		M	PRN	MA	Child	17203186	04/24/2009
Collins, Kimberly		V	08/16/2002		F	PRN	MA	Child	17203187	04/24/2009
Collins, Tyler		V	03/30/2009		M	PRN	MA	Child	17203188	04/24/2009

Count = 5

Person Search

Search Type: Phonetic Name First: Maggie M: Last: Adams

Address: Street, PO Box/Apt, City, State, Zip, County

DOB: / / Age: Phone: Race: Sex:

Identifiers: Type:

Search Clear

Person Search List

Match	Name	DOB	T	Sex	Person ID	County	Street	City	Race	SSN	Primary Name	Match	Score
▶	Adams, Maggie	09/15/1975		F	14602481	ONONDAGA	145 S SALINA ST	SYRACUSE	Black or African American		Adams, Maggie	NAME	100

Count = 742

Person Info Person Merge/Split Case List

Detail Address Phone AKA Names Identifiers Characteristics Person Events

Relate New

! = Sensitive \* = Required \$ = AFCARS ✓ = Data Exists 🗝 = Read-Only Mode 📄 = Unsaved Changes

# 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

Print Screen

Case Search Criteria

Case List

Image	Merge	Status	Case Name	Case ID	Dist/Agy	Zone	Case Type	Worker	Work Phone	Ext
		OPN	Adams, Maggie	34600000	ONONDAGA		SVC	Wilson11, Darryl		
		OPN	Adams, Maggie	34600021	ONONDAGA		SVC	Wilson110, Darryl		
		OPN	Adams, Maggie	34600022	ONONDAGA		SVC	Wilson110, Darryl		
		OPN	Adams, Maggie	34600023	ONONDAGA		SVC	Wilson110, Darryl		
		OPN	Adams, Maggie	34600024	ONONDAGA		SVC	Wilson110, Darryl		
		OPN	Adams, Maggie	34600025	ONONDAGA		SVC	Wilson110, Darryl		

Count = 50

Comp Case To-Dos Case Events Case Summary

Name	M/S	DOB	Age	Sex	Ethnicity	Race	Rel/Int	Street	Street(2)	City	County
Adams, Maggie		09/15/1975	35	F	Non-Hispanic	Bl/Af-Amer	Mother	145 S SALINA ST		SYRACUSE	031
Adams, Jamal		02/22/1994	17	M	Non-Hispanic	Bl/Af-Amer	Child	145 S SALINA ST		SYRACUSE	031
Adams, Evelyn		03/24/2003	8	F	Non-Hispanic	Bl/Af-Amer	Child	145 S SALINA ST		SYRACUSE	031

Count = 4

! = Sensitive \* = Required \$ = AFCARS ✓ = Data Exists 🔒 = Read-Only Mode 📄 = Unsaved Changes

# 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**

The screenshot shows the 'Case/Stage Search' application window. The interface includes a navigation pane on the left, a main content area with a table and summary, and a status bar at the bottom. Red circles highlight the following elements:

- Case Search Criteria**: A dropdown menu in the top right of the main area.
- Specialty Paths**: A menu item in the left navigation pane.
- Case Summary**: A tab in the summary section.
- Stage Events**: A tab in the stage events section.

**Table 1: Case List**

Image	Merge	Status	Case Name	Case ID	Dist/Agy	Zone	Case Type	Worker	Work Phone	Ext
		OPN	Adams,Maggie	34600000	ONONDAGA		SVC	Wilson11,Darryl		

Count = 50

**Case Summary Section:**

Case ID: 34600000      Case Manager: Wilson11,Darryl      Dist/Agy: 031

Status: Open      Start Date of Case: 7/7/2009

**Table 2: Stage Events**

Merge	Stage Name	Stage	Type	County	Zone	CD	PGM	Opened	Closed	SEC	Worker	Role
	Adams,Maggie	FSS	CWS	031			CPS	04/24/2009			Wilson11,Darryl	Case

Count = 2

**Status Bar:** ! = Sensitive \* = Required \$ = AFCARS ✓ = Data Exists 🔒 = Read-Only Mode 🔄 = Unsaved Changes

# 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.

**Options for filtering have been moved from the Options Menu to the window.**

County: ONONDAGA

Filter By: Full Units

Available Staff

Unit	Worker Name	Agency	County	Zone	Last Assigned	Time	Phone
J14	Wilson457,Darryl	A31	031		10/14/1997	12:00 AM	
J14	May457,Sally	A31	031		08/07/1997	12:00 AM	

Count = 2

Case Manager Case Planner Case Worker CPS Wrkr Mntr

Assignments

Stage Name	Worker Name	Role	Agency	County	Zone	Person ID
Adams,Maggie	Wilson496,Darryl	Case Manager	A31	031		15495
Adams,Maggie	Wilson457,Darryl	Case Planner	A31	031		15456

Count = 2

Unassign Save & Close Save Reset

! = Sensitive \* = Required \$ = AFCARS ✓ = Data Exists 🔒 = Read-Only Mode 📄 = Unsaved Changes

# 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.**

The screenshot displays the 'CONNECTIONS' software interface. The top navigation bar includes 'HOME', 'WORKLOAD & TO-DOs', 'REPORTS', and 'WINDOWS MANAGER'. The left sidebar contains a 'Common' menu with options like 'List Assignments Made', 'Change Case(Stage) Name/CD', 'Case Summary', 'Assign', 'Stage Actions', 'Progress Notes', 'CPRS', 'Person List', 'Safety Assessments', 'Risk Assessment', 'Allegations', 'Investigation Conclusion', 'Safety Assessments for Case', 'Investigation Actions', 'Maintain Primary Address & Phone', 'Review Intake', 'Record FSI', 'Accept', 'Reject', and 'To Do Options'. The main content area is divided into 'My Workload' and 'Case To-Dos' sections.

**My Workload Table:**

	New	Stage Name	Stage	Type	Role	Stage ID	Case ID	County	Zone	Agency	Start Date	Assigned	Unit
<input type="checkbox"/>		Adams,Maggie	FSS	CWS	CP	24600926	34600473	031		A31	04/24/2009	04/24/2009	E63
<input type="checkbox"/>		Collins,Kristy	FSS	CWS	CP	27201831	37200472	031		A31	04/24/2009	04/24/2009	E62
<input checked="" type="checkbox"/>		Collins,Kristy	INV	INI	PR	27201829	37200472	031			04/24/2009	04/24/2009	E62

Count = 24

**Case To-Dos Table:**

	Type	Status	Date	Stage ID	Stage Name	Description	Assigned To	Create	
<input type="checkbox"/>	Navigate	T	NEW	07/02/2009	27201829	Collins,Kristy	Safety Assessment is due and must be submitted to Supervisor for approval.	DW	System

Count = 3

Legend: ! = Sensitive \* = Required \$ = AFCARS ✓ = Data Exists 🔒 = Read-Only Mode 📄 = Unsaved Changes

# 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**.

**Case Summary - Collins, Kristy - C:37200472**

Merge	Stage Name	Stage	Type	Determination	County	Zone	CD	PGM	Opened	Closed	SEC	Work
	Collins, Kristy	FSS	CWS		031			CPS	04/24/2009			Wilso
	Collins, Kristy	FSI	CWS		031			CPS	04/24/2009	04/24/2009		Wilso
	Collins, Kristy	INV	INI	UNF	031			CPS	04/24/2009			Wilso

Count = 4

**Stage Events**

Event Date	TX Date	Status	Type	Description	Stage	Stage Name
06/25/2009	06/25/2009	COMP	Assignment	Case Worker Assignment Issued For: Wilson1, Darryl of Agy : V01	FSS	Collins, Kristy
06/25/2009	06/25/2009	COMP	Approval	DW - Approve INI FASP for FS Stage Collins, Kristy - 27201831	FSS	Collins, Kristy
06/25/2009	06/25/2009	APRV	Fasp	FASP Submitted for approval	FSS	Collins, Kristy
06/25/2009	06/25/2009	COMP	Fasp Launch	Initial FASP was launched by Wilson10, Darryl	FSS	Collins, Kristy

Count = 9

Legend: ! = Sensitive \* = Required \$ = AFCARS ✓ = Data Exists 🔒 = Read-Only Mode 🔄 = Unsaved Changes

**CPS Intake - 27201828 - Collins, Kristy [Read Only]**

Call Entry	Call Persons	Allegations	Facility	Decision	Summary
Call ID:	27201828	Case ID:	37200472	Status:	CLD
Case Name:	Collins, Kristy	Merge To Case ID:		Merge To Stage ID:	
Classification:	CPF	Intake Type:	INI	Call Date/Time:	06/25/2009 11:27 AM
Reporter:	William, John				

Save

# 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.

The screenshot shows the 'Person List' application window. The title bar reads 'Person List - Hill, Jean - S:25301825/C:35300922'. The main area contains a table of persons with columns: Name, M/S, Sch, DOB, Approx, Sex, Type, Role, Rel/Int, Person ID, and Date Added. The table lists several persons, with Jackie Walker selected. Below the table is a 'Person Info' form for Jackie Walker, showing details like First Name (Jackie), Last Name (Walker), Sex (Female), and Role (Grandparent). The form includes various tabs like 'Person Merge/Split', 'Case List', and 'Detail'. A legend at the bottom explains symbols like '!' for Sensitive, '\*' for Required, '\$' for AFCARS, etc.

Name	M/S	Sch	DOB	Approx	Sex	Type	Role	Rel/Int	Person ID	Date Added
Hill, Jean		V	05/11/1977		F	PRN	NO	Mother	15303177	01/30/2009
Walker, Jackie		V	08/14/1937		F	PRN	UK	Grandparent	15303181	01/30/2009
Hill, George		V	10/12/1974		M	PRN	AS	Biological Father	15303178	01/30/2009
Hill, William		V	12/23/1998		M	PRN	MA	Child	15303179	01/30/2009
Hill, Ken		V	10/31/2008		M	PRN	UK	Child	15303180	01/30/2009

Person Info Form for Jackie Walker:

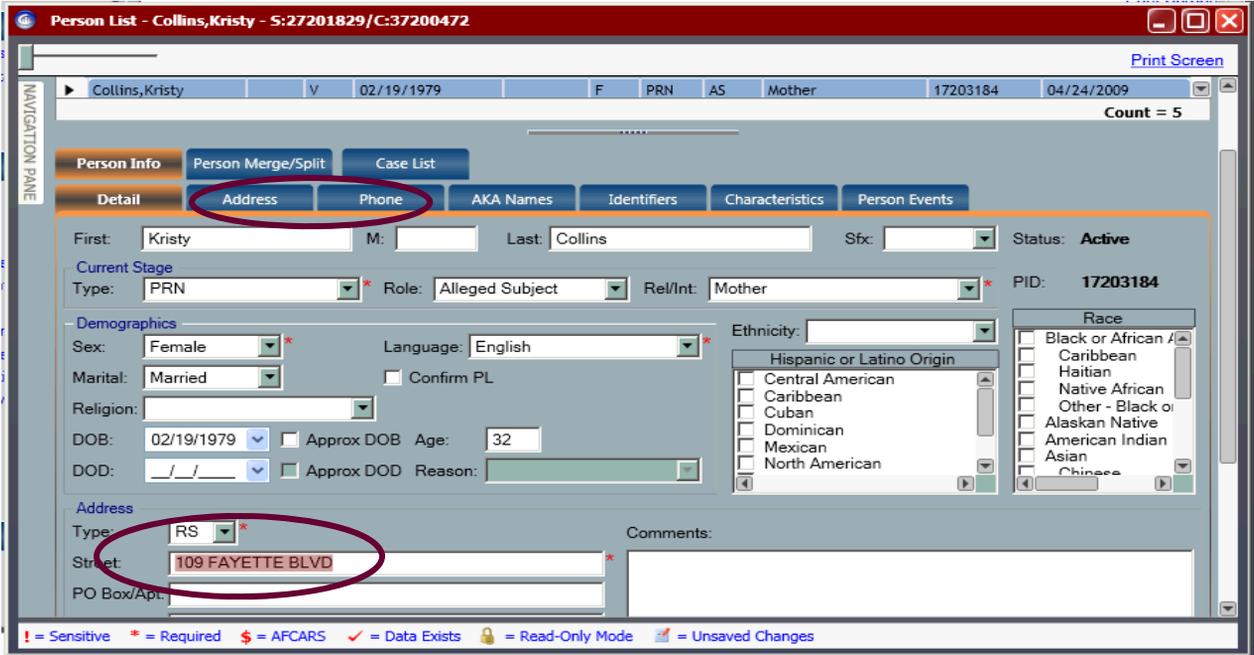
- First: Jackie, M: [ ], Last: Walker, Sfx: [ ], Status: Active
- Current Stage: Type: PRN, Role: Unknown, Rel/Int: Grandparent, PID: 1530318
- Demographics: Sex: Female, Language: English, Ethnicity: [ ], Race: [ ]

Legend: ! = Sensitive, \* = Required, \$ = AFCARS, ✓ = Data Exists, 🔒 = Read-Only Mode, 💾 = Unsaved Changes

# 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.



Person List - Collins, Kristy - S:27201829/C:37200472

Collins, Kristy | V | 02/19/1979 | F | PRN | AS | Mother | 17203184 | 04/24/2009 | Count = 5

Person Info | Person Merge/Split | Case List

Detail | **Address** | Phone | AKA Names | Identifiers | Characteristics | Person Events

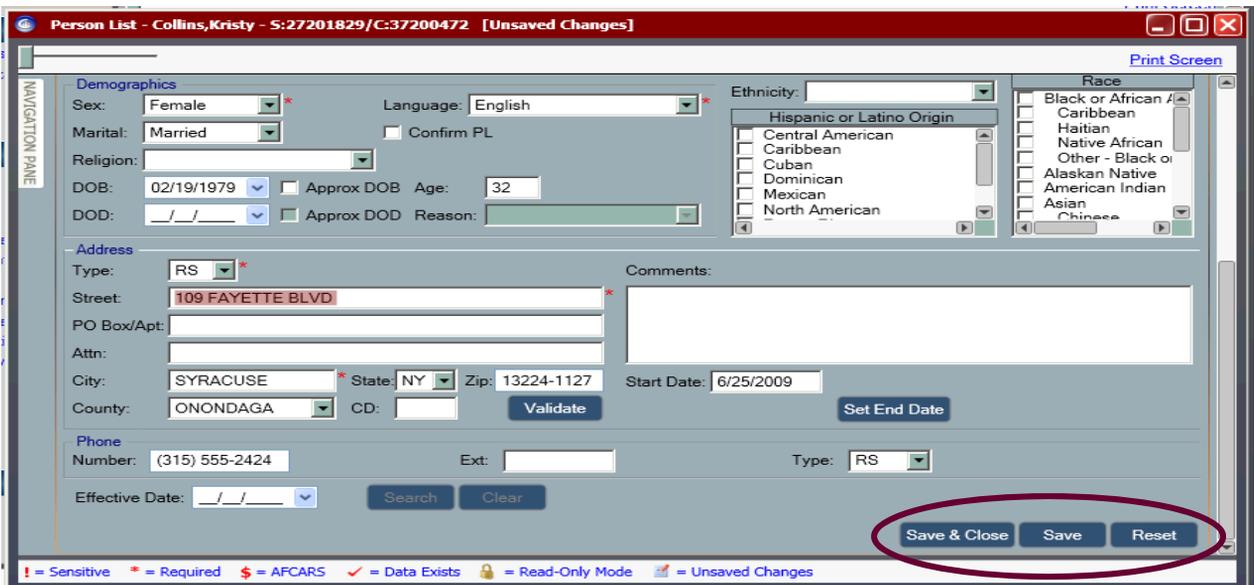
First: Kristy M: Last: Collins Sfx: Status: Active

Current Stage  
Type: PRN \* Role: Alleged Subject Rel/Int: Mother \* PID: 17203184

Demographics  
Sex: Female \* Language: English \* Ethnicity: Hispanic or Latino Origin  
Marital: Married Confirm PL  
Religion: DOB: 02/19/1979 Approx DOB Age: 32  
DOD: Approx DOD Reason:

Address  
Type: RS \* Street: 109 FAYETTE BLVD \* PO Box/Apt: Comments:

! = Sensitive \* = Required \$ = AFCARS ✓ = Data Exists 🔒 = Read-Only Mode 🔄 = Unsaved Changes



Person List - Collins, Kristy - S:27201829/C:37200472 [Unsaved Changes]

Demographics  
Sex: Female \* Language: English \* Ethnicity: Race  
Marital: Married Confirm PL  
Religion: DOB: 02/19/1979 Approx DOB Age: 32  
DOD: Approx DOD Reason:

Address  
Type: RS \* Street: 109 FAYETTE BLVD \* PO Box/Apt: Attn: City: SYRACUSE \* State: NY Zip: 13224-1127 Start Date: 6/25/2009  
County: ONONDAGA CD: Validate Set End Date

Phone  
Number: (315) 555-2424 Ext: Type: RS  
Effective Date: Search Clear

**Save & Close** Save Reset

! = Sensitive \* = Required \$ = AFCARS ✓ = Data Exists 🔒 = Read-Only Mode 🔄 = Unsaved Changes

# 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**.

The screenshot shows a web application window titled "Safety Assessment for Case - Gray, April - 5:25801805/C:35800902". The window contains a navigation pane on the left with options for "Event Options", "Detail", and "Help". The main area displays a table with the following data:

Event Date	TX Date	Status	Type	Description	Stage	Stage Name	Stage ID	Person	Ent
	04/01/2011	PROC	Assessment	Safety Assessment - CPS 7 Day	INV	Gray, April	25801807		Syst
▶ 04/01/2011	04/01/2011	APRV	Assessment	Safety Assessment - CPS 7 Day	INV	Gray, April	25801805		Syst

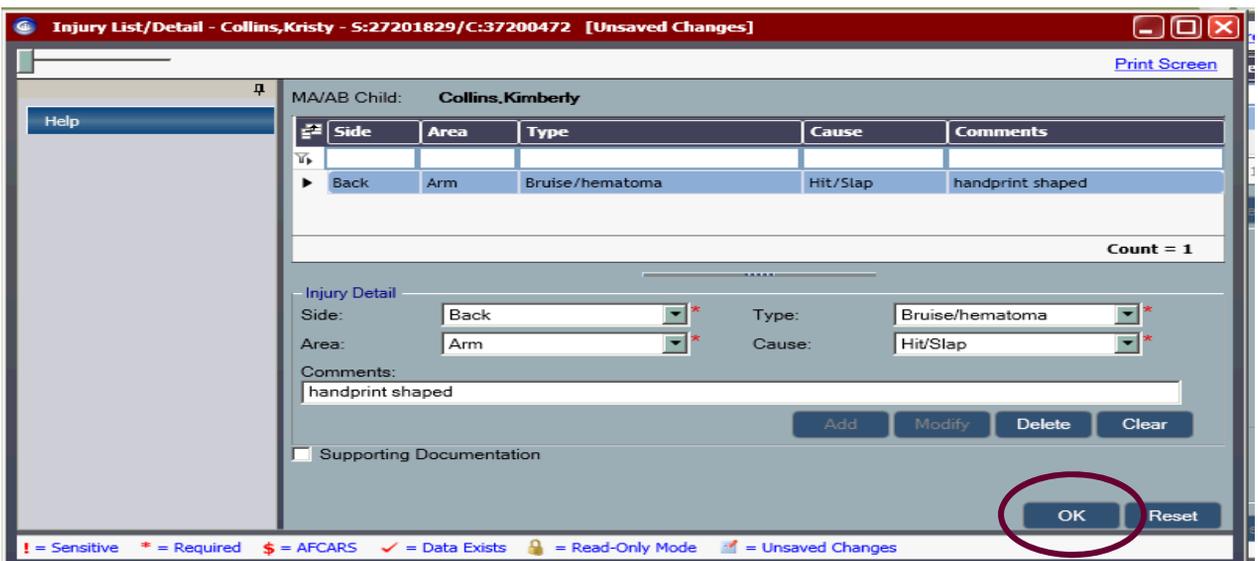
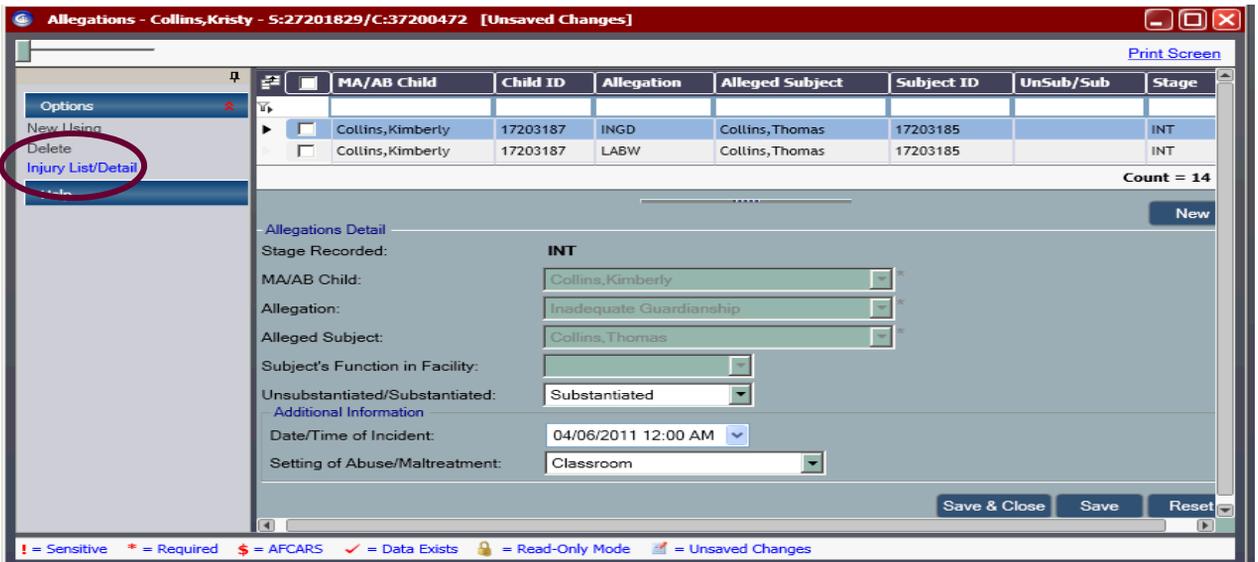
Count = 2

Legend: ! = Sensitive \* = Required \$ = AFCARS ✓ = Data Exists 🔒 = Read-Only Mode 📄 = Unsaved Changes

# 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 Action Questions - Collins,Kristy - 5:27201829/C:37200472 [Unsaved Changes]

Print Screen

Comments	Actions	Response
	Initiated investigation within 24 hours?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
	Reviewed previous reports and safety assessments?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
	Contacted sources?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
	Consulted office of legal affairs when denied entry to household?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
	Interviewed each child residing in the household?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
	Interviewed each subject and each parent?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
	Explained each allegation to subject(s) and non-subject parent(s) ?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
	Provided required notifications to all appropriate persons?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
	Made a home visit?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
	Contacted schools, medical facilities, and other collaterals?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A
✓	Assessed child's environment?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
	Reviewed allegations and investigatory information against statutory and regulatory standards for the purposes of making a determination?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A

Count = 12

Record Comments Here

Save & Close Save Reset

! = Sensitive \* = Required \$ = AFCARS ✓ = Data Exists 🔒 = Read-Only Mode 🔄 = Unsaved Changes

Check Marks display for each completed Comment Box

# Investigation Stage

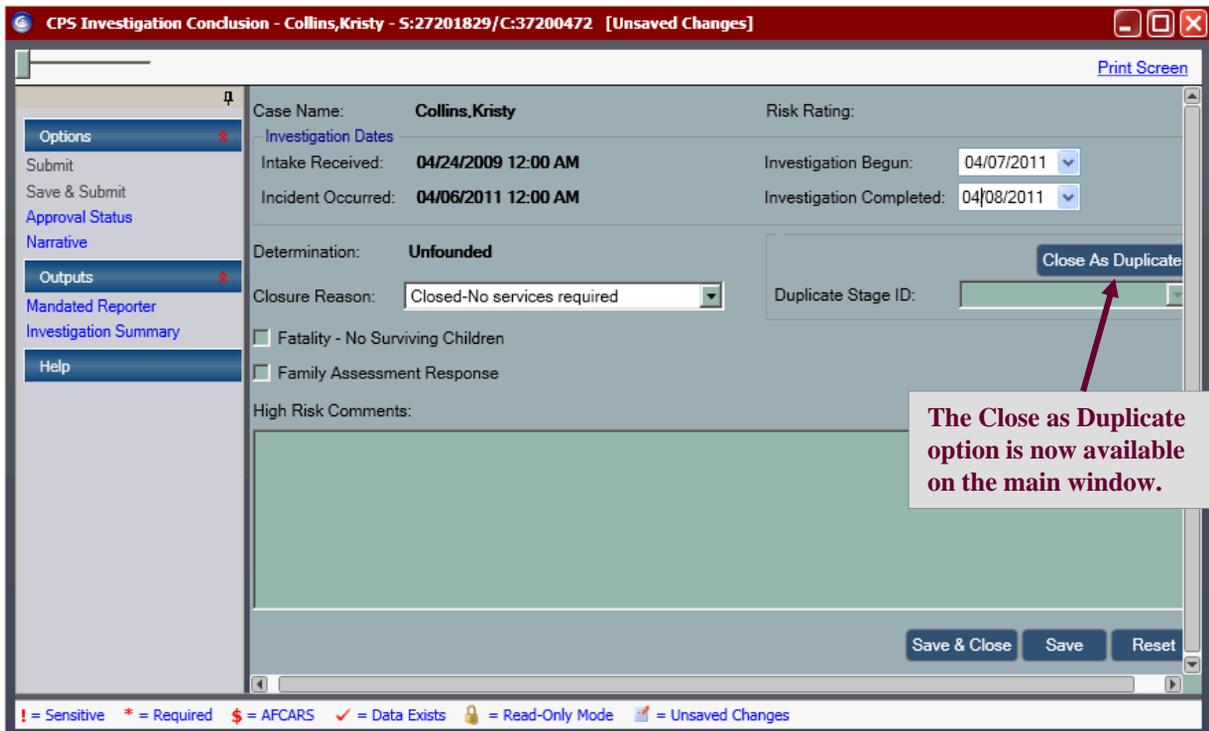
## Investigation Conclusion

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.

The screenshot displays a software interface with a navigation pane on the left and a main workspace. The navigation pane includes sections like 'Common', 'Stage Actions', 'To Do Options', and 'Outputs'. The main workspace is divided into 'My Workload' and 'Case To-Dos' sections.

**My Workload Table:**

	New	Stage Name	Stage	Type	Role	Stage ID	Case ID	County	Zone	Agency	Start Date	Assigned	Unit
<input type="checkbox"/>		Hill, Jean	INV	INI	PR	25301821	35300920	031			01/29/2009	01/30/2009	E62
<input type="checkbox"/>		Hill, Jean	INV	SUB	PR	25301823	35300920	031			01/30/2009	01/30/2009	E62
<input checked="" type="checkbox"/>		Holmes, Barbara	FAD	REG	PR	23700406	33700406	031			02/18/2004	02/18/2004	F64

Count = 24

**Case To-Dos Table:**

	Type	Status	Date	Stage ID	Stage Name	Description	Assigned To	Created
<input type="checkbox"/>	Navigate	T	01/19/2006	23700406	Holmes, Barbara	A Re-evaluation is due in one month.	DW	System
<input type="checkbox"/>	A		04/04/2011	23700406	Holmes, Barbara	Designee Logged Approval. Events have been frozen.	SM	System

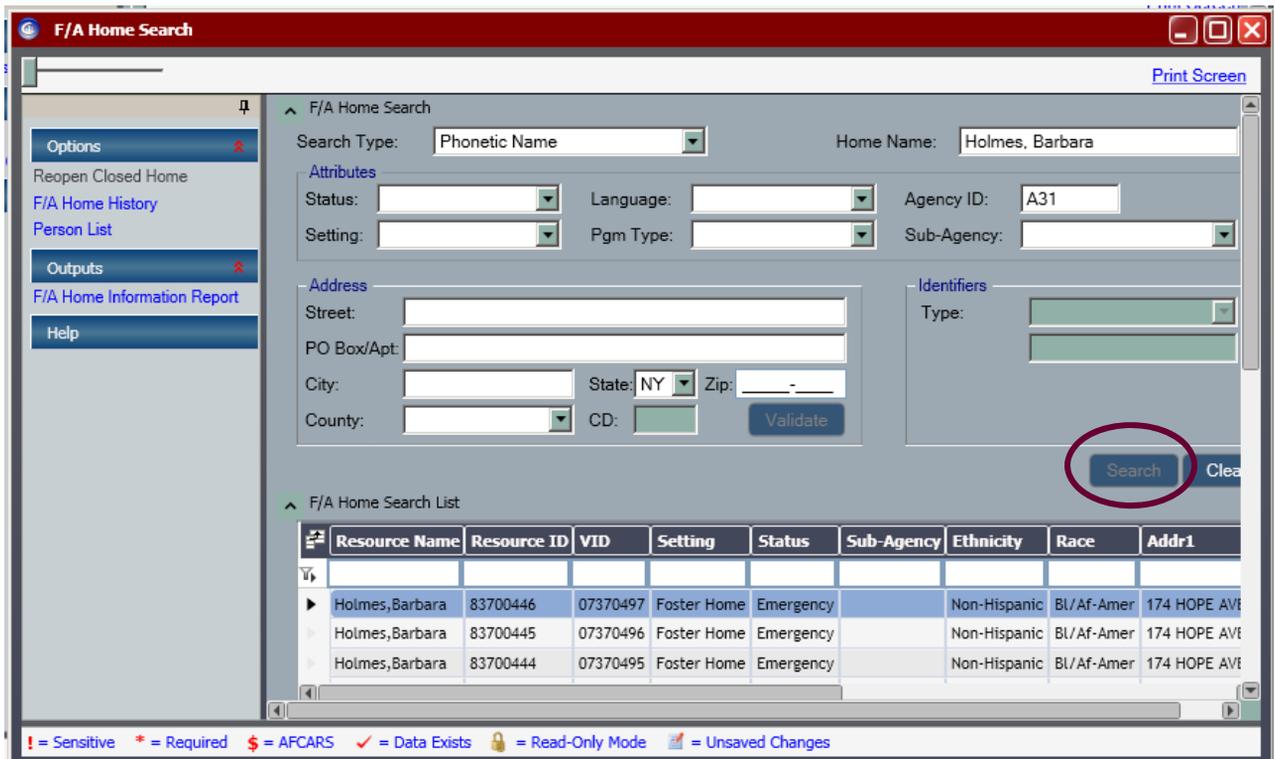
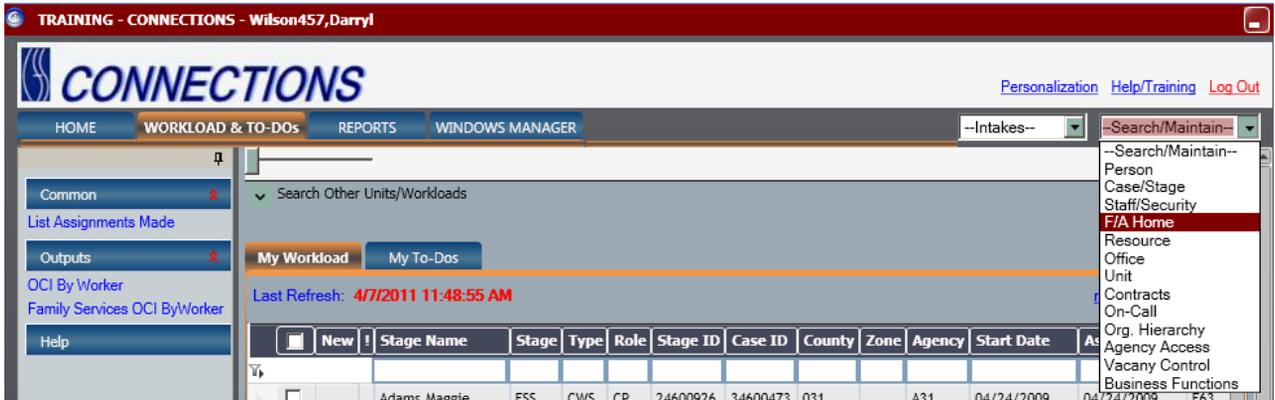
Count = 4

Legend: ! = Sensitive \* = Required \$ = AFCARS ✓ = Data Exists 🔒 = Read-Only Mode 📄 = Unsaved Changes

# 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**.

Resource Name	Resource ID	VID	Setting	Status	Sub-Agency	Ethnicity	Race	Addr1
Holmes, Barbara	83700446	07370497	Foster Home	Emergency		Non-Hispanic	Bl/Af-Amer	174 HOPE AVE
Holmes, Barbara	83700445	07370496	Foster Home	Emergency		Non-Hispanic	Bl/Af-Amer	174 HOPE AVE
Holmes, Barbara	83700444	07370495	Foster Home	Emergency		Non-Hispanic	Bl/Af-Amer	174 HOPE AVE

# 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.

**F/A Home Search**

Search Type: Phonetic Name Home Name: Nairb, Yellek

Attributes  
Status: [ ] Language: [ ] Agency ID: A01  
Setting: [ ] Pgm Type: [ ] Sub-Agency: [ ]

Address  
Street: [ ]  
PO Box/Apt: [ ]  
City: [ ] State: NY Zip: [ ]  
County: [ ] CD: [ ] Validate

Identifiers  
Type: [ ]

Search Clear

F/A Home Search List

Resource Name	Resource ID	VID	Setting	Status	Sub-Agency	Ethnicity	Race	Addr1	City	County	State
Nairb, Yellek	20748059		Foster Home	Closed				1 MAIN ST	ALBANY	ALBANY	NY

Count = 1

Home Demographics Address Phone New

**Re-Open Home - Nairb, Yellek - R:20748059/V:**

Current Status: Closed Change To: Inquiry

Closure Reason: A-Agency Closing

Subsidy Indicator  
 KinGAP

Save & Close Save Reset

# 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.

Home Demographics - Holmes, Barbara - R:83700407/V:07370458

Print Screen

Filtered Event List

Event Date	TX Date	Status	Type	Description	Stage	Stage Name	Stage ID	Person	Entered
02/18/2004	02/18/2004	COMP	Home	Non-Licensing Change Made	FAD	Holmes, Barbara	23700407		Wilson1
02/18/2004	02/18/2004	COMP	Home	New Home Created	FAD	Holmes, Barbara	23700407		Wilson1

Count = 2

Current Home Demographics Info

Current Home Demographics | Address | Phone

Home Name: Holmes, Barbara \* Resource ID: 83700407

Legal Name: Holmes, Barbara Ethnicity: Non-Hispanic or Latino

Setting: Foster Home \* Status: Emergency

Auth. Agency: Onondaga County Religion: Catholic

Sub-Agency: Language: English

Respite: Not Accepted Marital: Single, never MA

Inquiry Source: Child Placing Agency

Primary Address: Primary Phone:

! = Sensitive \* = Required \$ = AFCARS ✓ = Data Exists 🔒 = Read-Only Mode 📄 = Unsaved Changes

# 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 screenshot shows the 'Home License - Holmes, Barbara - R:83700406/V:07370457' window. The 'Current License Information' section is active, showing details for a 'Foster Home' with a 'Certified Foster Home' facility type and an 'Emergency' status. The window includes sections for 'Male Age Range Approved', 'Female Age Range Approved', and 'Placement Information'. A 'Program Types' list includes options like 'Therapeutic', 'Special Needs - Mother/Child', and 'Special Needs - HIV+/AIDS'. A 'KinGAP' checkbox is highlighted with a red circle. The bottom status bar indicates various system settings like 'Sensitive', 'Required', 'AFCARS', 'Data Exists', 'Read-Only Mode', and 'Unsaved Changes'.

# 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 screenshot shows a software interface with a navigation pane on the left and a main content area. The navigation pane has a 'Person List' link circled in red. The main content area displays a table with one row of data for 'Yellek, Nairb'. Below the table, there are several tabs: 'Person Info', 'Person Merge/Split', 'FA Home Person Detail', 'Home Member Training', and 'Case List'. The 'Person Info' tab is selected, and its 'Detail' sub-tab is active. The 'Detail' sub-tab shows various fields for personal information, including 'First Name', 'Last Name', 'Sex', 'Language', 'Religion', 'DOB', 'DOD', 'Address', and 'Race'. A red circle highlights the 'Person Info' and 'Detail' tabs. A red arrow points to the bottom of the window, with a text box stating 'Scroll to access Address and Phone sections and Save and Close buttons.'

# 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 ended in a FSS stage).

The screenshot shows the 'Person List' application window for 'Nairb, Yellek - R:20748059'. The window title is 'Person List - Nairb, Yellek - R:20748059 [Unsaved Changes]'. The main area displays a table with one record:

Name	M/S	Sch	DOB	Approx	Sex	Type	Role	Rel/Int	Person ID	Date Added
Yellek,Nairb		V	01/01/1966	A	M	PRN	NO	Foster Parent	35678791	04/11/2011

Below the table, there are tabs for 'Person Info', 'Person Merge/Split', 'FA Home Person Detail', 'Home Member Training', and 'Case List'. The 'FA Home Person Detail' tab is active, showing a form with the following fields:

- Birth Location: US Birth State: NC, Non US Born:
- Birth City: Mayberry
- Birth County: [Dropdown]
- Birth Country: USA
- General Info: Highest Education: Grade 9, Citizenship Status: US Citizen, Maiden Name: [Text], Most Recent Employer: Acme Timber
- Fingerprint Information: Date Sent: 04/05/2011, Date Received: 04/11/2011
- Foster Parent: Medical Exam Date: 04/05/2011

The navigation pane on the left has 'Options' and 'Outputs' sections. Under 'Options', 'Remove Person - Left Home' is circled in red. At the bottom right, 'Save & Close', 'Save', and 'Reset' buttons are also circled in red.

# 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.

**TRAIN - CONNECTIONS - Sup Wilson330,Darryl**

**CONNECTIONS** [Personalization](#) [Help/Training](#)

**HOME** **WORKLOAD** **Foster and Adoptive Home Record Summary**

File Options Help

Resource Name: Holmes,Barbara Auth From Date: 1/31/2011 Auth To Date: 5/1/2011 Vendor ID: 07370330  
Resource ID: 83700279 Agency Name/Resource ID: Onondaga County Dss / 20000440

Home Demo. Licensing Information Household Member Detail Home History Events Agy./Worker Information Home Study Narrative **Annual Reauth. Narrative** FAD Checklist Contacts

**Annual Reauthorization**

Standard Annual Reauthorization  
 Other

**Retrieve/Edit Narrative**

**Submit** **Help on Narratives** **Generate Report** **Close**

**Common**

- List Assignments Made
- Change Case(Stage) Name/ CD
- Case Summary
- Assign

**Stage Actions**

- Person List
- Licensing Information
- Home Demographics
- Home History
- Annual Reauthorization**
- Home Study
- Vacancy Control Plus Maintenance
- Corrective Action Plan
- Serious Incident
- Waiver/Exception
- Close Home
- FRS**

**To-Do Options**

- New
- Detail
- Delete
- Mark As Complete

# 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.

Event Date	TX Date	Status	Type	Description	Stage	Stage Name	Stage ID	Person	Entered By
04/11/2011	04/11/2011	PROC	Corrective Action	Corrective Action	FAD	Nairb, Yellek	27379146		Paul, Patricia

Count = 1

Corrective Action Plan Detail

Output Type: **Corrective Action**

Date Last Updated: **04/11/2011 11:54:05**

Output Completed:

Save & Close Save Reset

# 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.

FA Home History - Holmes, Barbara - R:83700406/V:07370457 [Unsaved Changes]

Print Screen

02/18/2004	02/19/2004	Foster Home	Pending Emergency	Regular	2	3	4	8	9
------------	------------	-------------	-------------------	---------	---	---	---	---	---

Count = 9

NAVIGATION PANE

Home History Detail

Status: Pending Emergency Auth From: 02/18/2004 Auth To: 02/19/2004

Setting: Foster Home Facility: Certified Foster Home Cap: 2

Male Age Range Approved

Min Year: 3 Min Month: Max Year: 4 Max Month:

Female Age Range Approved

Min Year: 8 Min Month: Max Year: 9 Max Month:

Closure Reason: Recommend Re-Opening: Involuntary Closure: Start Date: 02/18/2004 End Date: 02/19/2004

Program Types

- Therapeutic
- Special Needs - Mother/Child
- Special Needs - Medical
- Special Needs - Maternity
- Special Needs - Hard to Place
- Special Needs - HIV+/AIDS

Therapeutic Special Needs Regular Emergency

From: From: From: 01/12/2004 From: Subsidy

! = Sensitive \* = Required \$ = AFCARS ✓ = Data Exists 🔒 = Read-Only Mode 📄 = Unsaved Changes

# 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.

The screenshot shows a web application window titled "Close Home - Nairb, Yellek - R:20748059/V: [Unsaved Changes]". The window contains a navigation pane on the left with options like "Options", "Save & Submit", "Approval Status", "Outputs", "Closure Report", "Event History", and "Help". The main area displays a "Filtered Event List" table with columns: Event Date, TX Date, Status, Type, Description, Stage, Stage Name, Stage ID, Person, and En. A single row is visible with values: 04/07/2011, 04/07/2011, COMP, Conclusion, Home closed, FAD, Nairb, Yellek, 27379146, and Pat. Below the table, there are form fields for "Current Status" (Applicant), "Change To" (Pending Closure), "Closure Reason" (A-Agency Closing), "Closure Type" (Voluntary Closure), "Recommend Re-Opening" (Recommend), and "Date Notification Sent" (04/07/2011). There are also checkboxes for "Subsidy Indicator" and "KinGAP". Buttons for "New", "Save & Close", "Save", and "Reset" are present at the bottom.

Event Date	TX Date	Status	Type	Description	Stage	Stage Name	Stage ID	Person	En
04/07/2011	04/07/2011	COMP	Conclusion	Home closed	FAD	Nairb, Yellek	27379146		Pat

Count = 1

Current Status: Applicant Change To: Pending Closure  
Closure Reason: A-Agency Closing  
Closure Type: Voluntary Closure Subsidy Indicator  
Recommend Re-Opening: Recommend KinGAP  
Date Notification Sent: 04/07/2011

Buttons: New, Save & Close, Save, Reset

# Windows Manager and Log Out

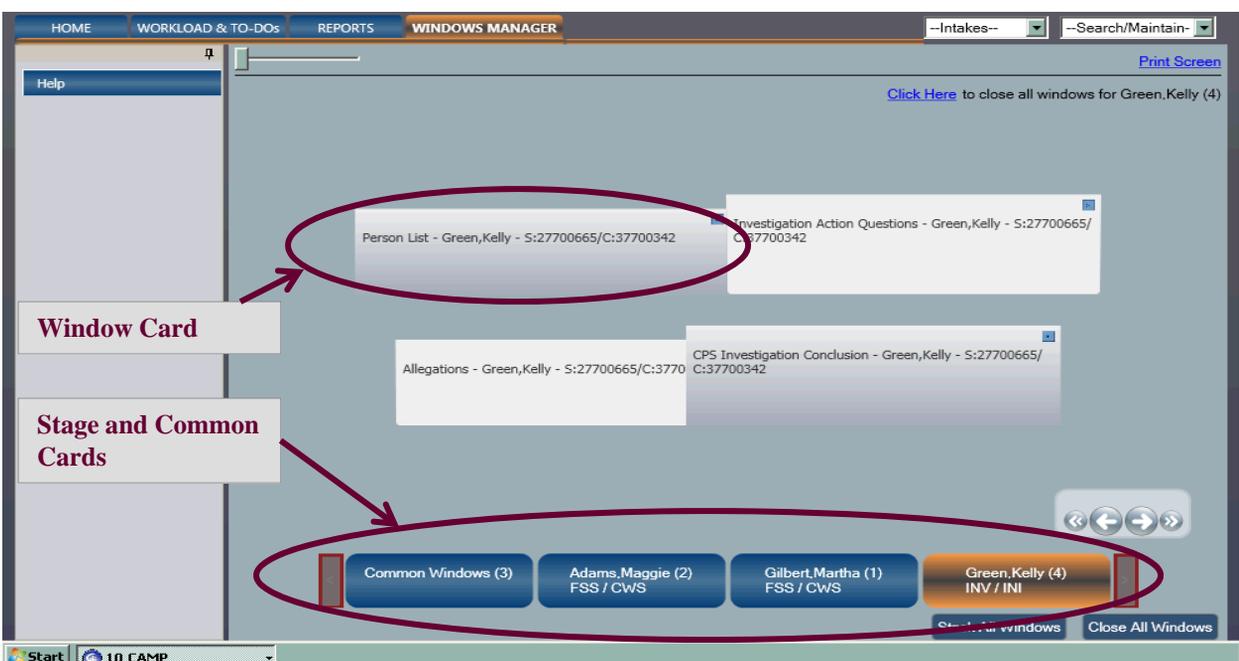
In the transformed system multiple stages and in some situations, multiple windows within stages can be open at the same time. The **WINDOWS MANAGER** tab on the toolbar keeps track of the windows and stages that are open.

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	<ul style="list-style-type: none"> <li>• Main windows</li> <li>• Pop- up windows</li> </ul>	An update has been made and all required fields are complete	<ul style="list-style-type: none"> <li>• Display a validation message</li> <li>• If user validates, information is saved to the CONNX database</li> <li>• After save, window is refreshed to display changes</li> </ul>
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	<ul style="list-style-type: none"> <li>• Display a validation message</li> <li>• If user validates, information is updated or removed from the grid</li> <li>• Information is saved to the CONNX database when the parent window is saved</li> </ul>
Reset	<ul style="list-style-type: none"> <li>• Main windows</li> <li>• Pop-up windows</li> </ul>	An update has been made on a main or dependent window	<ul style="list-style-type: none"> <li>• Display a message allowing the user to cancel or continue</li> <li>• If the user continues, changes are deleted without saving to the database</li> <li>• The window is refreshed</li> </ul>
OK	<ul style="list-style-type: none"> <li>• Main windows</li> <li>• Some secondary and pop-up windows</li> </ul>	An update has been made and all required fields are complete	<ul style="list-style-type: none"> <li>• Changes made to the window are accepted but not saved to the database until the parent window is saved</li> </ul>
Add	Windows with grids which allow for multiple lines of information to be recorded prior to save	<ul style="list-style-type: none"> <li>• Required information for a <u>new</u> entry is complete</li> <li>or</li> <li>• An existing entry has been modified and required fields are complete</li> </ul>	<ul style="list-style-type: none"> <li>• Display a validation message</li> <li>• If user validates, updated information is added to the grid</li> <li>• Information is saved to the CONNX database when the parent window is saved</li> </ul>

## 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	<ul style="list-style-type: none"> <li>• Display a validation message</li> <li>• If user validates, information is updated or removed from the grid</li> <li>• Information is saved to the CONNX database when the parent window is saved</li> </ul>
Clear	<ul style="list-style-type: none"> <li>• Main windows or pop-up windows with grids which allow for multiple lines of information to be recorded prior to save</li> <li>• Searches</li> </ul>	Information has been selected or entered	<ul style="list-style-type: none"> <li>• Clear all fields from a grid without saving to the database</li> <li>• For Searches, clear search criteria, search results, and any other information on the window and reset the left navigation.</li> </ul> <p>Note: the “Reset” button has been renamed ‘Clear’</p>
Search	<ul style="list-style-type: none"> <li>• Main windows</li> <li>• Pop-up windows</li> </ul>	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	<ul style="list-style-type: none"> <li>• Display a validation message</li> <li>• If user validated, the Code 1 Validation pop up is then displayed for the user to accept or reject the address</li> <li>• After accept or reject, Save, Save and Close or Reset</li> </ul>
Select	On sections of main windows or pop-up window that require selection from a grid	When a grid checkbox is selected	<ul style="list-style-type: none"> <li>• Pass selected information to the parent window</li> <li>• Close the pop up window</li> <li>• Return the user to the parent window</li> <li>• Add the selected information to the parent window</li> </ul> <p>Note: replaces OK on some windows</p>
Set End Date	On widows with address and phone information	A non-end dated address or phone number is selected	<ul style="list-style-type: none"> <li>• End dates the selected information based on the current date</li> <li>• Enables Save, Save and Close or Reset.</li> </ul>