

CONNECTIONS

System Build 13.1

Case Status Maintenance Report



CONNECTIONS Training Project
SUNY Training Strategies Group

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CONNECTIONS
System Build 13.1
Case Status Maintenance Report Job Aid

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You can obtain a copy of this job aid online in the Public Folders.
The directory path is:

All Public Folders > Statewide > CONNECTIONS > Build 13.1

Note: Due to differences in local printers, parts of this job aid may be differently formatted when printed from the Public Folders. Page numbers may not match those listed in the table of contents.

Note: Sample reports presented in this job aid differ slightly in appearance and formatting from actual system generated reports.

Note: Any visible identifying data in examples in this job aid is simulated.

Introduction

CONNECTIONS' online Case Status Maintenance functionality allows districts to maintain case status. Users can change the status of a case from "closed" to "open" or vice versa. This will allow workers to close cases that have an "Open" case status, but no open CPS stages. (See Build 13.1 CPS Job Aid for more information on online Case Status Maintenance.)

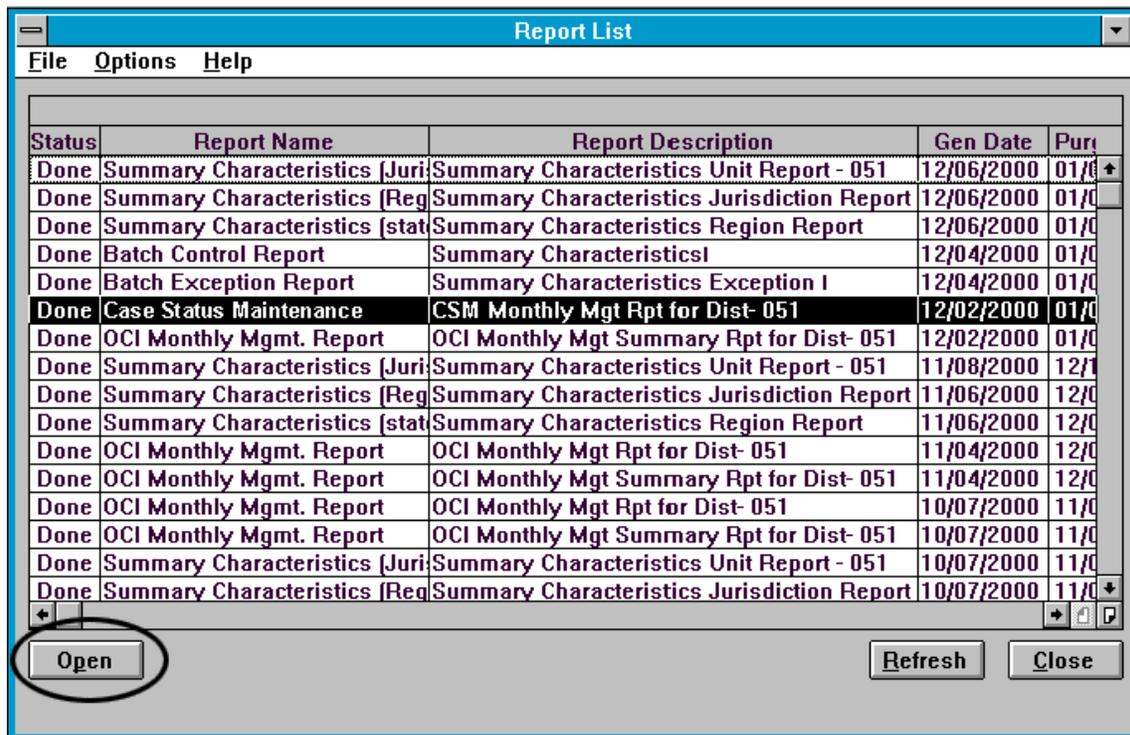
The Case Status Maintenance (CSM) Report will identify cases in each district that are "Open" and have no open CPS stages. The purpose of the report is to assist districts in tracking cases that may need to be closed.

Note: New York City is not using this report at this time.

Accessing the Report

The CSM Report will be generated at the same time each month and sent to each district as a monthly batch report. The report will be available to individuals identified by the district.

When the batch report has been run, you will find it in the *Reports List* window when you click on the **Reports** button on the CONNECTIONS toolbar.



Status	Report Name	Report Description	Gen Date	Pur
Done	Summary Characteristics (Juri	Summary Characteristics Unit Report - 051	12/06/2000	01/0
Done	Summary Characteristics (Reg	Summary Characteristics Jurisdiction Report	12/06/2000	01/0
Done	Summary Characteristics (stat	Summary Characteristics Region Report	12/06/2000	01/0
Done	Batch Control Report	Summary Characteristics	12/04/2000	01/0
Done	Batch Exception Report	Summary Characteristics Exception I	12/04/2000	01/0
Done	Case Status Maintenance	CSM Monthly Mgt Rpt for Dist- 051	12/02/2000	01/0
Done	OCI Monthly Mgmt. Report	OCI Monthly Mgt Summary Rpt for Dist- 051	12/02/2000	01/0
Done	Summary Characteristics (Juri	Summary Characteristics Unit Report - 051	11/08/2000	12/0
Done	Summary Characteristics (Reg	Summary Characteristics Jurisdiction Report	11/06/2000	12/0
Done	Summary Characteristics (stat	Summary Characteristics Region Report	11/06/2000	12/0
Done	OCI Monthly Mgmt. Report	OCI Monthly Mgt Rpt for Dist- 051	11/04/2000	12/0
Done	OCI Monthly Mgmt. Report	OCI Monthly Mgt Summary Rpt for Dist- 051	11/04/2000	12/0
Done	OCI Monthly Mgmt. Report	OCI Monthly Mgt Rpt for Dist- 051	10/07/2000	11/0
Done	OCI Monthly Mgmt. Report	OCI Monthly Mgt Summary Rpt for Dist- 051	10/07/2000	11/0
Done	Summary Characteristics (Juri	Summary Characteristics Unit Report - 051	10/07/2000	11/0
Done	Summary Characteristics (Reg	Summary Characteristics Jurisdiction Report	10/07/2000	11/0

The CSM Report will remain on the *Report List* for 30 days. Viewing or printing the report will NOT remove it from the *Report List*.

Highlight the report you wish to view by clicking on it.

Click the **Open** button in the *Report List* window. This opens the report in a separate MS Word document window. You can view or print it from there.

Printing the Report

You can print the report from the Word document window.

Click on the **File** drop-down menu.

Click on *Print* to open the MS Word print dialogue. Here you can choose your printer, number of copies, etc..

Click the **OK** button. This sends the report to the printer.

When you're ready to close the report, click on the **File** drop-down menu and select *Close*. This closes the report and returns you to the *Report List* window.

Reading the Report

The CSM Report is made up of the following elements:
(Numbers correspond to numbered elements on the examples that follow.)

- 1 - The Report number (a system identifier for the CSM Report)
- 2 - The Heading includes the district name.
- 3 - Office number, Unit number, and Unit Site number.
- 4 - Confidential Information warning.
- 5 - The following information is available for each case referenced in the report:
 - Primary Worker (The primary worker of the last closed INV stage.)
 - Case Name
 - Case ID
 - Stage ID
 - Last Stage Closed (The date of that closure.)
 - Case Manager

6 - Each page of the CSM Report presents information about one unit within the district. On any unit's page, cases are sorted as follows:

- a) Primary workers associated with "open" cases that have no open CPS stages (defined as the primary worker of the last closed INV stage) are listed in alphabetical order.

The "open" cases for which each of these workers is responsible are listed in alphabetical order.

- b) End-dated staff with HP roles. These are workers who are no longer with the unit but were associated with "open" cases that have no open CPS stages. (They were the primary worker of the last closed INV stage.) They are listed in alphabetical order.

The "open" cases for which each of these workers is responsible are listed in alphabetical order.

If the information for a particular unit will not fit on a single page, additional pages will be used.

7 - Total number of cases for unit.

8 - Total number of cases for district. (Only appears on last page of report.)

9 - The date on which the report was generated.

10 - Page number n of ?

Note: Depending on the number of units in a district and the number of open cases in each unit, the CSM Report can be many pages long. The examples on the following pages show a multi-page report that includes information for the 3 units within a fictional district. While the format of these examples is patterned closely after the actual CSM Report printout, the layout has been compressed to eliminate blank space so that these examples will fit on fewer pages. In addition, these reports show a small number of cases. Actual reports may contain many more cases.

CSM00000 ①		② OFFICE OF CHILDREN AND FAMILY SERVICES CASE STATUS MAINTENANCE REPORT DISTRICT FICTIONAL			④ *****WARNING***** Confidential Information Authorized Personnel Only	
Office : 77 Unit : 111 ③ Unit Site : 1A1						
⑤	Primary Worker	Case Name	Case ID	Stage ID	Last Stage Closed	Case Manager
⑥a	Asper,James	Baker,Alice	12345678	23456789	05/11/2000	Loggins,Arron
		Conrany,Mary	90123456	01234567	01/13/1999	
		Vondeel,Arthur	78901234	89012345	03/10/1999	
	Bosun,Sarah	Jantel,Karen	56789012	67890123	08/29/1977	
	Worker,Verna	Goodrich,Tyrone	34567890	45678901	06/26/2000	
		Matlevin,Phillip	10293847	29384756	01/26/1998	
⑦	Unit Totals:	6				
⑩	Date Created : 2001/02/13 ⑨					
	Page: 1 of 4					

CSM00000 ①		② OFFICE OF CHILDREN AND FAMILY SERVICES CASE STATUS MAINTENANCE REPORT DISTRICT FICTIONAL			④ *****WARNING***** Confidential Information Authorized Personnel Only	
Office : 77 Unit : 222 ③ Unit Site : 2A2						
⑤	Primary Worker	Case Name	Case ID	Stage ID	Last Stage Closed	Case Manager
⑥a	Blake,Donald	Parker,Benjamin	11223344	22334455	11/22/1999	Garcia,John
		Rogers,Stephanie	33445566	44556677	01/24/2000	
	Dekker,Arthur	Grimson,Alicia	55667788	66778899	08/01/2000	
	Pym,Janet	Ecklert,Martin	66778899	77889900	05/11/1999	
		Radd,Noreen	88990011	22233355	03/28/1999	
⑦	Unit Totals:	5				
⑩	Date Created : 2001/02/13 ⑨					
	Page: 2 of 4					

