

7/24/02

CONNECTIONS

System Build 15

CPS:

Maintain Primary Address and Phone



CONNECTIONS Training Project
SUNY Training Strategies Group
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New York State Office of Children and Family Services*

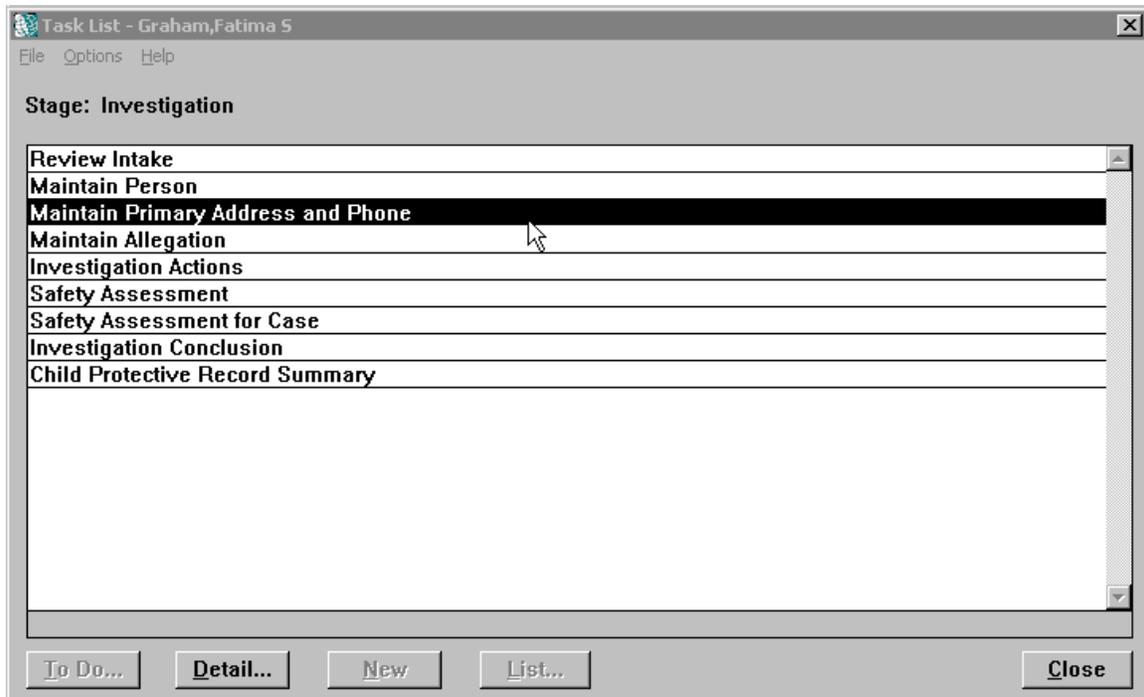
Note: This information was originally presented in the Build 15 CPS job aid and is excerpted here for use with the Build 15.1 CPS training. The complete Build 15 CPS job aid is available online:

- ⇒ In the Public Folders:
All Public Folders > Statewide > Connections > Build 15
- ⇒ On the CONNECTIONS Intranet site:
DFA Intranet Site > OCFS Homepage > Connections > Desk and Job Aids

Maintain Primary Address and Phone

Prior to Build 15, when workers updated an individual's address and/or phone information, they navigated through multiple windows and were only able to update one person at a time. Build 15 introduces a new window called the *Maintain Primary Address and Phone* window. Rather than retyping the information for each person, workers are able to use this one window to add or modify the primary address/phone information for multiple persons in a stage. This new function only applies to the Investigation stage. This window can also be used to select the existing primary address/phone for persons newly added to a stage.

Workers navigate to the *Maintain Primary Address and Phone* window by selecting the **Maintain Primary Address and Phone** task on the *Task List*.



Primary Address Information

Street: 40 N PEARL ST
 PO Box/Apt:
 City: ALBANY State: New York
 Zip: 12207-2729 County: ALBANY CD:
 Type: Residence

Primary Phone Information

Number: () -
 Extension:
 Type:

Name	Role	Rel	Type	Street 1	PO Box/Apt	City	St
Graham, Khandi	Maltreated Child	Child	RS	40 N PEARL ST		ALBANY	NY
Graham, Halley	Maltreated Child	Child	RS	40 N PEARL ST		ALBANY	NY
Graham, Telly	No Role	Grandparent					
Graham, Fatima S	Alleged Subject	Mother	RS	40 N PEARL ST		ALBANY	NY

Address and Phone information can be maintained using one of the following two methods:

I Manually Entering the New Address and/or Phone Information

- Record the new information in the fields at the top of the window.
- Click on the **Validate** button to perform a CODE-1 address validation. *All addresses must be validated. If there is a discrepancy between the CODE-1 address and the address that was recorded, a message will display showing both addresses for comparison. Please Note: If a NYC address was entered and the CD was not retrieved, the following message displays: "Community District Could not be Populated"*

Code-1 Address Validation

Original Address
 Street: 40 NORTH PEARL
 PO Box/Apt:
 City: ALBANY State: NY
 Zip:
 County: ALBANY CD:

Validated Address
 Street: 40 N PEARL ST
 PO Box/Apt:
 City: ALBANY State: NY
 Zip: 12207-2729
 County: ALBANY CD:

Accept Reject

- You must choose to either Accept or Reject the Code-1 Validated address. Click on the **Accept** button to replace the recorded address with the CODE-1 address; or click on the **Reject** button to use the recorded address.

4. To link this address to one or more individuals listed in the lower section, click on the box to the left of the individual(s) name. If you wish to select more than one individual, press and hold the **Ctrl** key while clicking on the box to the left of the name.
Selected individuals will highlight.
5. Click on the **Save** button.
*The following message displays:
"Changes Have Been Saved"*
6. Click on the **OK** button.
*The Maintain Primary Address and Phone window refreshes and displays with the modifications. Workers can make any additional changes or click on the **Cancel** button to return to the Task List.*

Or

II Linking an Individual to a Pre-existing Case Address

3. Select one person from the list in the lower section of the window.
4. Click with the *right* mouse button.
A menu displays offering the following options:
 - Use Primary Address;
 - Use Primary Phone; and
 - Use Both Address and Phone.

Maintain Primary Address and Phone - Graham, Fatima S - S:21672873/C:20843760

File Options Copy Help

Primary Address Information

Street:

PO Box/Apt:

City: State:

Zip: County: CD:

Type:

Primary Phone Information

Number: -

Extension:

Type:

	Name	Role	Rel	Type	Street 1	PO Box/Apt	City	St
<input type="checkbox"/>	Graham, Khandi	Maltreated Child	Child	RS	40 N PEARL ST		ALBANY	NY
<input type="checkbox"/>	Graham, Halley	Maltreated Child	Child	RS	40 N PEARL ST		ALBANY	NY
<input type="checkbox"/>	Graham, Telly	No Role	Grandparent					
<input checked="" type="checkbox"/>	Graham, Fatima S	Alleged Subject	Mother	RS	40 N PEARL ST		ALBANY	NY

- Use Primary Address
- Use Primary Phone
- Use Both Address and Phone

3. Select an option from the menu.
Once an option has been selected, the Address/Phone information automatically displays in the appropriate fields. This information can be altered if it is not applicable to the person.
4. If either Use Primary Address or Use Both Address and Phone is selected from the menu, click on the **Validate** button to perform a

CODE-1 address validation.
All addresses must be validated.

5. To link this address to one or more individuals listed in the lower section, click on the box to the left of the individual(s) name. If you wish to select more than one individual, press and hold the **Ctrl** key while clicking on the box to the left of the name.
Selected individuals will highlight.
6. Click on the **Save** button.
*The following message displays:
"Changes Have Been Saved"*
7. Click on the **OK** button.
*The Maintain Primary Address and Phone window refreshes and displays with the modifications. Workers can make any additional additional changes or click on the **Cancel** button to return to the Task List.*

Workers can exit the *Multiple Primary Address/Phone Maintenance* window without saving at any time by clicking on the **Cancel** button or selecting **Cancel** from the **File** drop-down menu.