



CONNECTIONS Tip Sheet

Activities Task Tips

April 2015

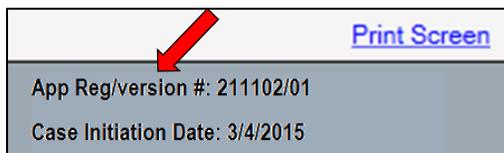
There are several common tasks in the new CONNECTIONS Activities Window that have proved challenging to workers. This tip sheet was created to provide guidance on completing these tasks. For additional information on the Activities window, please refer to the Getting to Know the CONNECTIONS Activities Window Build Job Aid. **Reminder:** Only district staff assigned the Maintain Activities business function can open or reopen an Activities track.

Opening a Track in Activities

A new Activities track should be opened when there is no currently open track for a child.

Because of the CONNECTIONS – WMS interface, a track cannot be opened in the Activities Window until *after* the WMS Case batches overnight and the WMS case number displays in CONNECTIONS.

The display of an App-Reg version number indicates that the WMS opening has not batched and an Activities track cannot yet be opened.



Reopening a Closed Track

In certain situations, a track that has been closed by the entry of an M999 may need to be reopened. You would reopen a closed track (formerly known as a Y Track Indicator) if the child has continually been in receipt of services. This might be necessary if:

- the M999 was entered in error
- the child/case is transferred to a new district
- a new stage and WMS case is opened for a child freed for adoption.

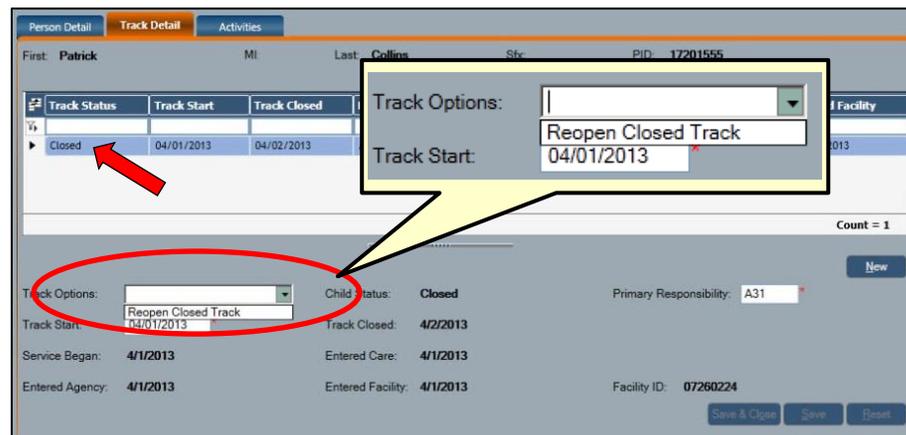
To reopen a closed track in the Activities window:

1. Search for the child by their WMS case number.
You cannot locate the child by their CIN number if they have a new WMS case number.

2. On the results grid, select the child whose track you wish to reopen.
3. Click the **Track Detail** tab.
4. Select the track on the first line on the grid.
There may be multiple closed tracks but, only the most recent track can be reopened.
5. In the **Track Options** field, select “Reopen Closed Track” from the drop down menu.

*The **Track Start** field prefills with a date equal to the day after the M999.*

*The **Primary Responsibility** field will populate with the logged-on worker’s agency code. Only the district can modify this field to another district or voluntary agency code.*



6. Click the **Save** button.
A memo entry will be system generated on the child’s Activities tab indicating the M999 has been deleted and the track has been reopened.

Reopening a Closed Track for a Freed Child

When the Case Manager indicates in the Family Services Stage (FSS) that a child is completely freed for adoption, the CONNECTIONS system automatically end-dates the child from that stage and creates a new Child Case Record (CCR) stage. An M999 is manually entered in the Activities window to close the child's track.

The new CCR stage requires the opening of new companion WMS case. Once the CCR has been created and the new WMS case opening has batched, the child's track in the Activities window must be reopened to preserve the history of legal events, placements and movements.



It is important to reopen the established track, rather than opening a new track, so that legal authority and other Activities are preserved, thus avoiding payments becoming Non-Reimbursable.

Follow the steps under *Reopening a Closed Track*, being sure to search for the child by their new (CCR related) WMS case number instead of their CIN. Searching by the child's CIN will return a result of "No match found for criteria entered."

New Track Opened When a Previously Closed Track Should Have Been Reopened

The situation of a new track having been opened when a previous track should have been reopened, is easily remedied by following the steps under *Reopening a Closed Track*. The reopening will system generate a memo entry on the Activities tab indicating the M999 has been deleted and the track has been reopened.

Date	Activity	Event	Modifier A
07/01/2009	Memo	MEMO - MEMO ENTRY	DLT M999
04/24/2009	Miscellaneous	TOTO - TRACKING START DATE	X

Converting a Track Start Date

The Tracking Start Date (TSD) is the date that services were initiated for a particular child.

It may be necessary to correct a child's TSD if it was entered incorrectly. For example, a worker opens the track for a child but mistakenly uses a Tracking Start Date of 3/8/15 instead of 3/18/15. In order to correct the TSD:

1. Click the **Track Detail** tab.
2. Highlight the child's track.
3. In the **Track Options** field, select, "Convert Track Start Date" from the drop down menu.

Track Options:	Convert Track Start Date	Child Status:	01 - Tracked
Track Start:	03/08/2015	Track Closed:	
Service Began:	3/8/2015	Entered Care:	3/8/2015

4. Enter the correct date in the **Track Start** field.
5. Click the **Save** button.

Modifying an Activities CID

The Activities Case Initiation Date (CID) is the date when services were initiated for a case/family. For new cases, the Activities CID prefills with the CONNECTIONS CID date.

The CID in the Activities window can precede and/or differ from, the CID in CONNECTIONS and from the WMS case opening date.

When opening a track for an child in the Activities window, the child's Tracking Start Date cannot precede the Activities CID date.

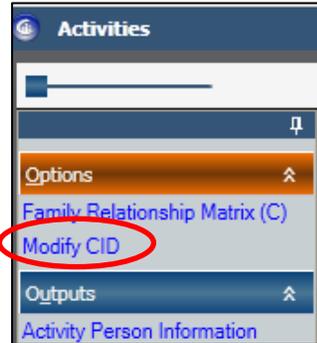
If services for a child preceded the Activities CID date, a two-step process is required; first open the child's track, then modify the Activities CID date.



Only District workers who are assigned the Modify CID Business Function can change an Activities window CID.

To Modify an Activities CID:

1. In the Activities window, click on the Modify CID link in the Navigation Pane.
2. On the Modify CID window, enter a date in the **Change CID To** field that is either the TSD of the child's prior track or an earlier date.

A screenshot of the 'Modify Current CID' form. The form has the following fields:

- Current CID:** 04/24/2009
- Change CID To:** 03/08/2015 (with a dropdown arrow and a red asterisk)
- Reason:** A dropdown menu is open, showing the following options: 'Correction', 'Move child between cases', 'Move case between counties', and 'OCFS Step-Down'.
- Comments:** A text input field.

3. Select the reason for the correction in the **Reason** field.
4. In the **Comment** field, enter a brief explanation of why the change is being made.
5. Click the **Save & Close** button.



Note: Before end-dating the child from the current FSS, be sure all necessary progress notes have been entered and casework contacts documented.

- On the Activities tab of the Activities window, enter an M999 code to close the child's track.
- Add the child to the new FSS. This will send a transaction to WMS adding the child to the WMS case and will require an overnight batch to fully process.
- Follow the instructions under the *Reopening A Closed Track* section to reopen the child's existing track. Remember to search for the child by their new WMS case number instead of their CIN.

Resources

Getting to Know the CONNECTIONS Activities Window Build Job Aid
<http://www.ocfs.state.ny.us/connect/jobaides/jobaides.asp>

CONNECTIONS Regional Implementation staff
<http://ocfs.state.nyenet/connect/contact.asp>

CONNECTIONS App-Help mailbox
ocfs.sm.conn_app@ocfs.state.ny.us
(NOTE: address contains an underscore)

Reminder: In all areas of CONNECTIONS, you can press F1 for help

Adding a Child with an Existing Track to Another Case

There are situations when a child with an existing Activities track needs to be added to a different Family Services Stage. For example, a child who receives services under one parent's FSS, then moves to the other parent's household would need to be tracked in the other parent's Family Service Stage.

The steps for tracking a child in a different Family Service Stage are:

- End-date the child in the current CONNECTIONS Family Services Stage. This will send a transaction to WMS, deleting the child from the current WMS case.