



CONNECTIONS Tip Sheet

Creating a FAR-Associated FSS

December 2014

During the course of a FAR stage, a family's need for ongoing services may become apparent. A Family Services Stage (FSS) can be opened at any time, not just when the FAR stage is ready to close. The Family Services Intake (FSI) standardizes intake information and is the path by which a Family Service Stage is created.

IMPORTANT: No FSI is needed if the family already has an open Family Services Stage in your district. Before recording an FSI, check to see if an open FSS already exists. If so, do not create an FSI – simply assign the needed roles in the existing FSS stage.



❖ Check for An Open FSS Stage

1. From your workload, highlight the FAR stage.
2. Click the Person List link in the left navigation pane.
3. Highlight a person in the Person List window.
4. Click on the Case List tab.
5. Highlight a case with the status of "OPN".
6. Click the Case Summary tab.
7. Check to see if the open stage has a stage type of FSS.

Comp	Case To-Dos	Case Events	Case Summary								
Case ID: 34600050 Case Manager: Wilson110,Darryl Dist/Agy: 031											
Status: Open Start Date of Case: 7/7/2009											
Merge	Stage Name	Stage	Type	County	Zone	CD	PGM	Opened	Closed	SEC	Wor
	Adams,Maggie	FSS	CWS	031			CPS	04/24/2009			Wilsc
	Adams,Maggie	FSI	CWS	031			CPS	04/24/2009	04/24/2009		Wilsc

If no open FSS exists, there are 3 methods by which an FSI/FSS can be created and linked to a FAR stage.

❖ Creating an FSI when Closing the FAR Stage

An FSI will be created automatically from a FAR stage when the closure reason is "Closed; assistance provided, preventive case opened".

1. From your workload, highlight the FAR stage.
2. Click the FAR Conclusion link in the left navigation pane.

3. In the Closure Reason field, select "Closed; assistance provided, preventive case opened".

Family Assessment Response Conclusion - Smith,Abigail - S:23300175/C:33300129 [Unsaved Changes]

Case Name: Smith,Abigail

FAR Dates

Intake Received: 12/03/2013 11:35 AM

Incident Occurred:

Determination: Family Assessment Response

Closure Reason:

Switch track from F

High Risk Comments

- Closed; no assistance needed
- Closed; family declined assistance
- Closed; assistance provided, additional services declined/not needed
- Closed; assistance provided, family linked to community resources
- Closed; assistance provided, preventive case opened**
- Closed; cannot locate/moved out of district
- Closed; other (see notes)

4. Click the Submit link in the left navigation pane.
5. When the closure is approved, an FSI is automatically created and will appear on your workload under the same Case Number as the FAR stage from which it was created.

❖ Create an FSI and Link it to the FAR Case Number

If no open FSS exists and the FAR stage is not ready to be closed, you can still open an FSI/FSS.

1. Use the Intakes pull-down menu on the upper right of the main CONNECTIONS toolbar to select "Record FSI".
2. The FSI automatically opens for you to begin recording information.

--Intakes-- --Search

- Intakes--
- Record CPS Call
- Call Log
- Record FSI**
- Record Family Services I&R
- FSI Log
- F/A Home

When a Family Service Intake is created from the Record FSI command, a new Case Number and Stage Number are created for the FSI. No information is prefilled

when the FSI is created in this manner; all data must be manually entered.

3. Complete each of the FSI tabs:

- Intake Source Tab

This tab captures information about the person creating the FSI. Phone number is a required field even though it is not marked as such.

- Narrative Tab

This tab should be used to record the reasons for involvement with the family, summarize the presenting needs of the individuals/family and document why services are needed at this time. This information will populate the Original Reason for Case Opening tab in all future FASPs

If appropriate, a case can be marked as sensitive by clicking the *Sensitive Case* button. In the Sensitive Case window, check the sensitive case checkbox and enter an explanation as to why the case is being marked as such.

NOTE: This action will mark the *entire* case as sensitive – not just the FSI stage – and will restrict access to it

- Person Demographics Tab

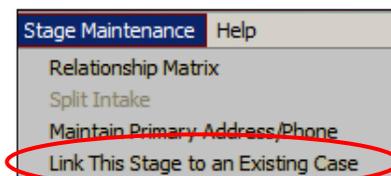
1. Add all household members plus the biological parents of any tracked children, whether or not they live in the household.

Adding persons in an FSI creates a new PID for each.

2. Once added, highlight each person and click the Search button to locate the person's existing PID in the CONNECTIONS database.

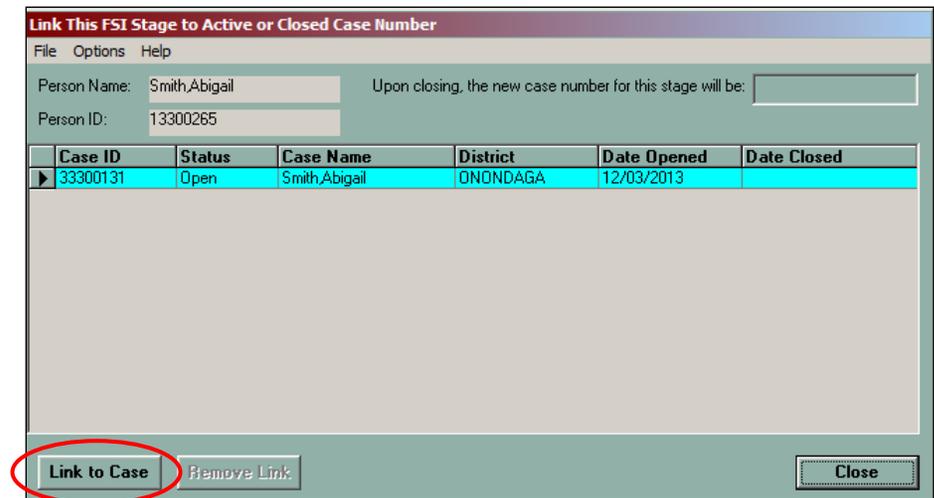
3. Click the Relate button. Remember to explore all possible matches as the person may have more than one existing PID and multiples should be identified and merged to keep all history together under a single PID.

4. To link the FSI to the existing FAR case, select a person over age 18 from the Person grid and click on the Stage Maintenance pull-down menu.



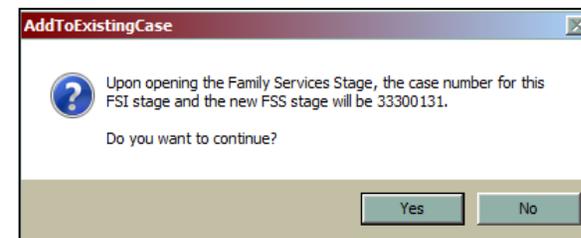
5. Select "Link This Stage to an Existing Case".

6. In the resulting window, highlight the case containing the FAR stage to which you wish to link this FSI. Links can be made to either open or closed cases.



7. Click the Link to Case button.

8. Verify that you wish to link the FSI by clicking the "Yes" button.



- Decision Summary Tab

1. Record whether the case is being opened for Preventive Services only.

2. Record the dates the application was sent and received.



CAUTION! – The date entered in the "Date LDSS Received Application Signed by Parent/Client" field will become the Case Initiation Date (CID), if it is the earliest of the 4 possible CID triggers. The CID is the earliest date that WMS payments can begin.

3. In the Decision field, choose “Open Family Services Stage” from the pull-down menu.
4. Verify that the FSI will be linked to the existing FAR case number.

Upon closing, the new case number for this stage will be:

5. If desired or required by local protocol, click the “Submit for Review” button to assign the FSI to another worker for review. This will remove the FSI from your workload and assign it to the chosen reviewer’s workload.
6. Click the “Create Family Services Stage (Stage Progression)” button to stage progress the FSI and create the FSS. The FSS will automatically be assigned to the worker who did the stage progression and will be linked to the same case number as the FAR stage.

❖ Create an FSS and Merge it to the FAR Case Number

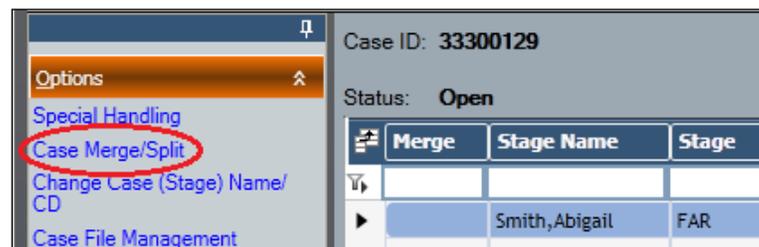
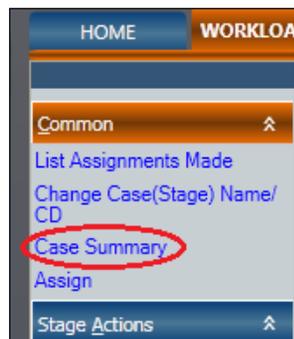
If you create an FSI from the Record FSI command on the Intakes menu, but do not link it to another case prior to stage progressing it into an FSS, you can still associate the FSS to the FAR stage case number by completing a Case Merge.

Case merges can only be done by someone assigned the Case Merge/Split business function.

1. From your workload, note the case number of the FSS stage that you wish to merge with the FAR case number.

HINT: if you right click on the case number to can then choose “Copy”.

2. Highlight the FAR stage.
3. Click on the *Case Summary* link in the left navigation pane.
4. Highlight the FAR stage.
5. Click on the *Case Merge/Split* link in the left navigation pane. The case number of the FAR stage will prefill in the “To ID” field.



6. Enter (or right click and paste) the FSS Case Number in the “From ID” field.

Merged Cases

To
 ID: *
 Name: **Smith, Abigail**

From
 ID: *
 Name:

7. Click the Validate button.
8. Click the Merge button.

9. Click the Save & Close button. The merge will process in an overnight batch and the two stages will now be part of the same case.

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

Resources:

CONNECTIONS Step-By-Step Guides:

<http://ocfs.state.nyenet/connect/jobaides/>

CONNECTIONS Regional Implementation Staff:

<http://ocfs.state.nyenet/connect/contact.asp>

CONNECTIONS Application questions:

ocfs.sm.conn_app@ocfs.state.ny.us (NOTE: address contains an underline)

CONNECTIONS Communications

CONNECTIONSCommunications@dfa.state.ny.us

NYS ITS Enterprise
 Help Desk #
 1.800.697-1323