



CONNECTIONS Tip Sheet

Creating a Family Services Intake (FSI) from a CPS Investigation

rev Dec 2010

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

IMPORTANT: No FSI is needed if the family already has an open FSS 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.



CHECK FOR AN OPEN FSS STAGE

1. From your workload, highlight the appropriate INV stage .
2. Select the **Persons List** link on the **NAVIGATION PANE**.
3. Select a person in the grid and click on the **Case List** tab.
4. If any case has the status of "OPN", highlight it and click on the **Case Summary** sub-tab.
5. Check to see if there is an open FSS.

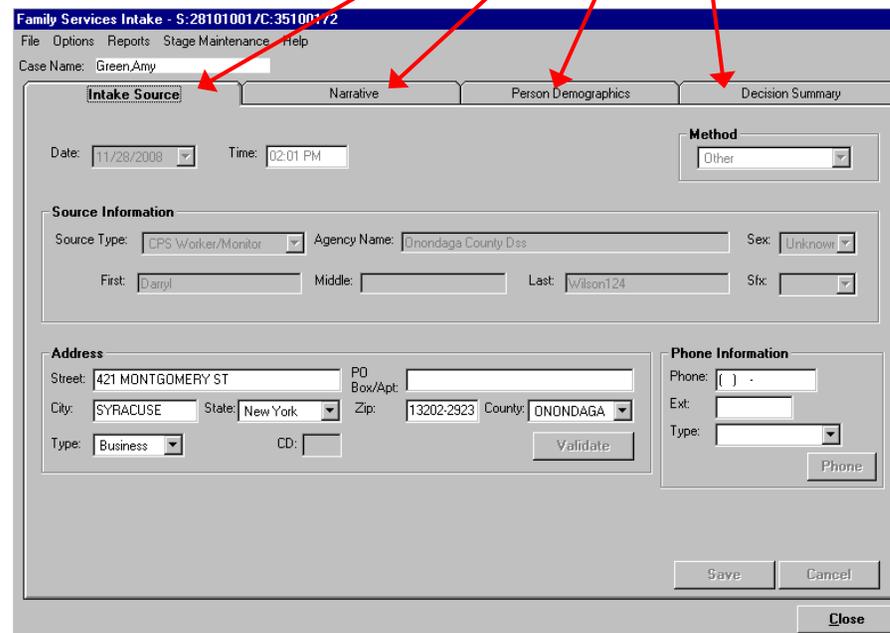
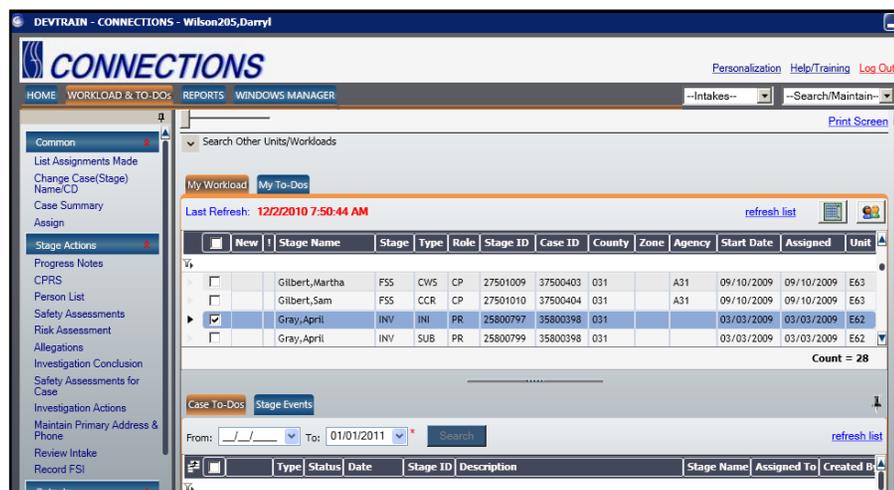
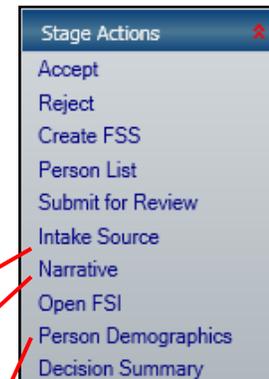
RECORD A FSI PRIOR TO DETERMINATION

1. If no open FSS exists, highlight the INV stage on your workload.

2. Select the **Record FSI** link from the **Stage Actions** section of the **NAVIGATION PANE**. The FSI automatically appears at the top of your workload.
3. To open the FSI, highlight it on your workload. From the **Stage Actions** section of the **NAVIGATION PANE**, select **Open FSI** or one of the links to the four FSI tabs.

Intake Source Tab

The **Intake Source** tab pre-fills with information from the INV stage.



- The **Date**, **Time** and **Method** fields automatically populate and cannot be modified.
- Source Information fields are populated with name, agency and sex of the worker who created the FSI. These fields are not modifiable.
- The **Address** and **Phone Information** fields are pre-filled with the agency address and phone information of the worker who created the FSI. These fields may be modified.

Narrative Tab

- The **Type of Services being requested** field will be pre-filled with **CWS (Child Welfare Services)** and cannot be modified.

1. Record the reasons for involvement with this family and why services are needed. Once saved, narrative entries cannot be modified, though additional narratives may be added. Each will be stamped with the worker's name, date and time.

In the narrative, clearly summarize the presenting needs of the individual/family and document the corresponding need for services.



In order to preserve the confidentiality of persons named in the CPS Investigation, investigation stage activities, outcomes, reporter/source information, and conclusions MUST NOT be included in the FSI narrative.

2. Use the **Requested Services** button to access the window on which to note what services are being requested.
3. 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 marks the entire case – not just the FSI stage – as sensitive and will restrict access to it. If the stage from which the FSI originated (e.g., the INV) is already marked as sensitive, the sensitive check box automatically pre-fills and any existing comments display.

Person Demographics Tab

Name	Person ID	Sch	D.O.B.	A	Age	SSN	Marital Status	Language	Religion	Race
Green,Amy	15100660	V	05/10/1962	N	46			English		Not R
Green,Ralph	15100661	V	05/10/1961	N	47			English		Not R
Green,Kathy	15100662	V	05/08/1995	N	13			English		Not R
Green,John	15100663	V	04/15/2004	N	4			English		Not R

Person demographics pre-fill when the FSI is created from an INV.

1. Check to see if the persons listed on the **Person Demographics** tab are correct.



REMINDER: A FSS should include all the household members and the biological parents of any tracked children ***whether or not they live in the household.***

2. Persons brought forward from the INV that will *not* be receiving services can be deleted from the FSI.

To delete a person from the list:

- Highlight the person's name on the pre-filled list.
- On the **Options** menu, select the **Delete Person** command.
- Click **Yes** in answer to the question, *Deleting this person will remove him/her from the stage. Continue?*

3. Add additional persons to the list as needed.
4. Conduct a thorough search of the data base to make certain that each person listed has only one Person Identification number (PID). *Explore all possible matches.* The individual you are searching for may be listed more than once in the database.

Review the information in the Person Search List to determine if the person you are searching for matches one or more of the results on the list. If you don't have enough information to make this determination, you can access more information about the person by looking at case composition.

5. Perform a check of WMS to identify if persons listed in the stage are already in the WMS database.

If a person is known to WMS, carefully note how their First Name, Middle Initial, Last Name, Suffix, DOB, Sex and Social Security Number appear. Correct the data in CONNECTIONS to match the WMS listing. This reduces errors at WMS case opening.

Note: If the information on the active WMS non-Services case is incorrect, you must contact the non-services worker to correct it.

6. Use the **Stage Maintenance** menu to select the **Relationship Matrix** command. Relationship Matrix information does not pre-fill and can be completed in either the FSI or FSS. Accuracy is important (e.g. sibling vs. half-sibling vs. step-sibling) as these relationships drive information in the FSS **Health Services** tab.

Decision Summary Tab

Family Services Intake - S:28101001/C:35100172

File Options Reports Stage Maintenance Help

Case Name: Green, Amy

Intake Source Narrative Person Demographics **Decision Summary**

Is this case being evaluated for Preventive Services ONLY? Yes No

Date application sent: 11/28/2008

Date LDSS Received Application signed by Parent/Client: 11/28/2008

Application signed by CPS Worker:

Decision: Open Family Services Stage

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

Submit For Review Submit For LDSS Acceptance Create Family Services Stage (Stage Progression) Close FSI Stage Save Cancel

Close

1. Record the dates the application was sent and received, or check the checkbox indicating the application was signed by the CPS Worker.



CAUTION! – The date entered in the Date LDSS Received Application Signed by Parent/Client field becomes 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.

2. In the **Decision** field, select **Open Family Services Stage** from the drop-down list.
3. If desired or required by local protocol, click the **Submit for Review** button to assign the FSI to another worker for review. This action removes the FSI from your workload and places it on the chosen reviewer's workload. In an FSI, only one person may have a role (Case Worker) in the stage at a time.
4. To stage progress the FSI to an FSS, click the **Create Family Services Stage (Stage Progression)** button. This action closes the FSI and creates a FSS. The FSS will appear on the workload

of the person who did the stage progression and assign him/her the role of Case Manager. The FSS can be reassigned to someone else if needed.

When created from an INV, the FSS is automatically linked to the same case number as the INV.



REMINDER: The Initial FASP is due within 30 days of the CID if the FSS is opened prior to the determination of the CPS report.

TO OPEN AN FSI AT DETERMINATION

When an INV stage is closed with one of the "open for services" closure reasons, an FSI is automatically created upon the approval of the INV investigation conclusion. These closure reasons are:

- Case Open – Services (unfounded CPS report)
- Case Open - CPS not required (indicated CPS report)
- Case Open - CPS required (indicated CPS report)

Complete the FSI by following the steps already outlined above.

Note: Selecting the Case Open – CPS required closure reason in an indicated investigation automatically generates the Program Choice of Protective for every child in the open FSS (provided none of them is a Tracked Child in another case).



REMINDER: The Initial FASP is due within 7 days of the determination, if the FSS is opened at the determination of a CPS report.

ONCE THE FSS IS OPEN

1. Assign roles

Assign appropriate roles in the FSS (Case Planner, Case Worker, CPS Worker/Monitor) to other workers who will be providing services to the child and family.

2. Designate Health Responsibility (if applicable)

If a child has been placed with a voluntary agency that will be responsible for entering Health Services information, designate the agency as having Health Responsibility once they have been assigned a role in the stage.

Note: The agency worker must be assigned a role in the FSS in order for the agency name to appear on the Responsible Agency list.

To designate Health Responsibility:

- Select the **Health Services** tab on the *Family Services Stage* window.
- Select any child from the **Child List** grid.
- On the **Options** menu, select the **Designate Health Responsibility** command.
- On the *Designate Health Responsibility* window, click in the box to the left of the appropriate child's name.
- Select the desired agency by clicking on the box to the left of the agency name.
- Click the **Add** button.
- Repeat as needed for each child.
- Click on the **Save** button.

3. If it is your responsibility to complete the Initial FASP, the following information should be entered or verified as correct before launching the Initial FASP:

- Case Initiation Date (CID) and trigger
- Primary and Secondary Caretaker(s)
- Family Relationship Matrix
- Appropriate Program Choice(s) for each tracked child
- Permanency Planning Goal for each tracked child
- Removal Information Tab (if one or more children have been removed)

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 OFT Customer
Care Center #
1.800.697-1323