



CONNECTIONS Tip Sheet

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

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.

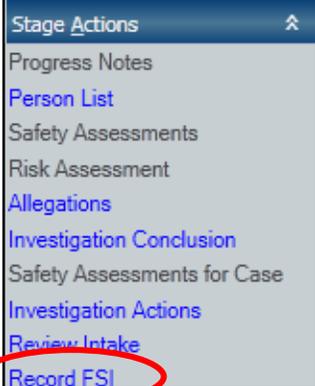


IMPORTANT: No FSI is needed if the family already has an open FSS in your district. Before recording an FSI, check to see if an open FSS already exists. If so, do not create an FSI - simply assign the needed roles in the existing FSS.

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** tab.
5. Check to see if there is an open FSS.

RECORDING 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 is created and automatically appears at the top of your workload.
3. Highlight the newly created FSI .

My Workload My To-Dos

Last Refresh: 7/30/2015 4:33:08 PM

	New	!	Stage Name	Stage	Type	Role	Stage ID	Case ID
<input checked="" type="checkbox"/>			Antonio, Maria	FSI	CWS	CW	23200540	30100064
<input type="checkbox"/>		Y	Smith, Abigail	FAR	INI	PR	23300175	33300129
<input type="checkbox"/>		Y	Smith, Abigail	FAR	INI	PR	24400087	34400063

4. From the **Stage Actions** section of the **NAVIGATION PANE**, select the **Intake Source** link or one of the other FSI windows links.

While windows may be completed in any order, the **Create FSS** link will not enable until all FSI windows are complete.



Intake Source Window

The **Intake Source** window 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 the name, agency and sex of the worker who created the FSI. These fields are not modifiable.

fsi - S:23200540/C:30100064

Stage: FSI Report/Intake Date: 07/31/2015

Stage Type: CWS

Intake Detail
Date: 07/31/2015 Time: 11:23 AM Method: Other

Source Information
Source Type: CPS Worker/Member Agency Name: Onondaga County Dis

First: Darryl M. Last: Wilson33 Sbc: [dropdown]

Sex: Unknown

Address
Type: Business
Street: 421 MONTGOMERY ST
PO Box/Apt: [dropdown]
City: SYRACUSE State: NY Zip: 13202-2923
Country: ONONDAGA CD: [dropdown] Validate

Phone
Number: [dropdown] [dropdown]
Extension: [dropdown]
Type: [dropdown]

Save & Close Save Discard

- 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 Window

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

Narrative - Antonio, Maria - S:23200540/C:30100064

Stage: FSI Report/Intake Date: 07/31/2015

Stage Type: CWS

Type of Services being requested: CWS (Child Welfare Services)

Record the reasons for involvement with this family.

The following narrative was entered by Wilson33[Darryl (15032) at 7/31/2015 11:42:21 AM

Save & Close Save Discard

- 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.

- Information entered in the FSI Narrative will be brought forward to all future FASPs as Original Reason for Case Opening in the Family Update section.



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.

- If appropriate, a case can be marked as sensitive by clicking the **Special Handling** link.

In the *Special Handling* window, check the sensitive case check-box and enter an explanation as to why the case is being marked as such.

Special Handling - Antonio, Maria - C:30100064

Special Handling: [dropdown]

Worker Safety Issues

Sensitive Case

Tribe: [dropdown] Tribe Contacted

Tribe Contact: [dropdown]

Save & Close Save Discard

! = Sensitive * = Required \$ = AFCARS ✓ = Data Exists (C) = Complete 🔒 = Read-Only Mode 📄 = Unsaved Changes

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 Case check box automatically pre-fills and any existing comments display.

Person List Window

Person List information pre-fills when the FSI is created from an INV.

Name	M/S	Sch	DOB	Approx	Sex	Type	Role	Rel/Int	Person ID	Date Added
Antonio, Maria		Y	12/28/1964		F	PRN	SA	Mother	10100192	07/31/2015
Evans, Cynthia		Y	03/02/1999		F	PRN	SA	Child	10100195	07/31/2015
Faraci, David		Y	08/10/1989		M	PRN	SA	Child	10100194	07/31/2015
Evans, Anthony		Y	06/14/1963		M	PRN	SA	Step-Parent	10100195	07/31/2015

Count = 4

Person Info
 First: Maria, Last: Antonio, Status: Active
 Current Stage: PID, Role: Services Applicant, Relist: Mother, PID: 10100192
 Demographics: Sex: Female, Language: English, Ethnicity: Non-Hispanic or Latino, Race: Black or African American
 DOB: 12/28/1964, Approx DOB: Age: 50, DOD: /-/

1. Check to see if the persons listed on the grid 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 who will *not* be receiving services can be deleted from the FSI.

To delete a person from the Person List:

- Highlight the person's name on the **Person List** grid.
- Click the **Delete** link on the **NAVIGATION PANE.**
- Click **Yes** in answer to the question, *Deleting this person will remove him/her from the stage. Continue?*

Options

- New Search
- Add Person
- Person Unrelate
- Delete**
- Split Intake
- Family Relationship Matrix

Additional persons may also be added to the stage by clicking the **Add Person** link on the **NAVIGATION PANE.** This will initiate a person search of the database.

3. For persons brought over from the INV stage, use the **New Search** link, to conduct a thorough search of the data base and

make certain that each person listed has only one Person Identification number (PID). *Explore all possible matches.* The individual you are searching may have more than one additional PID. If you need more information to determine whether a person returned in the search is a match for your person, look at the case composition.

4. 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

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

Requested Services Window

Use the **Requested Services** link to access the window on which specific services requested by the source or the family may be noted.

Stage: FSI Report/Intake Date: 07/31/2015
 Stage Type: CWS

Requested Services. Choose all that apply.

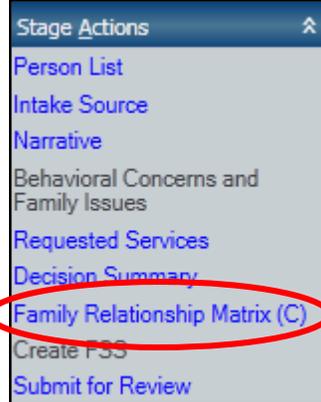
- Adoption Services
- After School Programs
- Aftercare
- Alcohol Counseling/Treatment
- Assisted Living
- Batterer's Counseling
- Case Management Services
- Casework Counseling
- Child Care Services
- Clinical Services
- Community Advocacy
- Crisis Response Services
- Day Care Services
- Day Services
- Day Treatment
- Detox Services
- Developmental Disability Services
- Diagnostic Evaluation

Save & Close Save Reset

Relationship Matrix Window

Complete the **Relationship Matrix** by clicking on the link in the **NAVIGATION PANE**. Relationship Matrix information does not pre-fill.

- Accuracy is important (e.g. sibling vs. half-sibling vs. step-sibling) as these relationships drive information in the FSS **Health Services** window.
- When complete, the Family Relationship Matrix link should display a "(C)" to the right of it.



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** link 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 FSS** link.

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 them the role of Case Manager. The FSS can be re-assigned to someone else if needed.

Decision Summary Window

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

A screenshot of the 'Decision Summary' window for an FSI stage. The window title is 'Decision Summary - Antoinette, Maria - S23206540 / C:30100064'. It shows fields for 'Stage: FSI', 'Stage Type: ChWS', and 'Report/Intake Date: 07/31/2015'. There are buttons for 'Submit for Review', 'Create FSS', and 'Help'. A 'Decision' dropdown menu is visible. At the bottom, there is a status bar with icons for 'Sensitive', 'Required', 'APCRS', 'Data Exists', 'Complete', 'Read-Only Mode', and 'Unsaved Changes'.

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.



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 appropriate roles (Case Planner, Case Worker, CPS Worker/Monitor) in the FSS 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.

3. If it is your responsibility to complete the Initial FASP, be sure the following information has been 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 from the home)

For additional information on the FSI, please see the FSI Build Job Aid (January 2015), *Getting to Know the Transformed Family Services Intake Stage in CONNECTIONS*, at [http://ocfs.ny.gov/connect/imp/FSI/FSI%20Build%20Job%20Aid_OCFS-Approved%20v1.0%20\(01-08-15\).pdf](http://ocfs.ny.gov/connect/imp/FSI/FSI%20Build%20Job%20Aid_OCFS-Approved%20v1.0%20(01-08-15).pdf)



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

Resources

- CONNECTIONS Job Aids and Tip Sheets:
<http://ocfs.state.nyenet/connect/jobaides/jobaides.asp>
- CONNECTIONS Regional Implementation Staff:
<http://ocfs.state.nyenet/connect/contact.asp>
- CONNECTIONS Application Help Mailbox:
ocfs.sm.conn_app@ocfs.state.ny.us
(NOTE: address contains an underline)
- CONNECTIONS Communications Mailbox:
connections@ocfs.ny.gov

ITS Enterprise Service Desk 1-800-697-1323