

CONNECTIONS Tip Sheet

Foster and Adoptive Home (FAD): Tips for Troublesome Tasks

April 2012

A number of FAD-related tasks have prompted requests for assistance from OCFS user support teams. This Tip Sheet addresses many of these tasks. A full set of FAD "how do I" documents can be accessed on the [Help/Training](#) link in CONNECTIONS (as of Spring 2012). Additional questions may be directed to: ocfs.sm.connections_app_help@ocfs.state.ny.us.

How to Create a "Dual Purpose" Home (Add a Foster Home to an Adoption Subsidy Home)

When persons receiving an adoptive subsidy wish to resume fostering, a foster home component can be added to their adoption subsidy home, rather than creating a separate foster home in CONNECTIONS. This is commonly referred to as a "dual purpose" home. Only districts may open and manage a dual purpose home because only a district generates adoption subsidy payments.

Step-by-Step: Adding a Foster Home to an Adoption Subsidy Home

1. If the Adoption Subsidy Home is on your workload, select the Stage Name and click the **Licensing Information** link in the **NAVIGATION PANE**.

If the Adoption Subsidy Home is not on your workload, conduct an F/A Home search, select the correct home from the possible matches, click the **Reopen Closed Home** link in the **NAVIGATION PANE** and assign the home.

2. On the *Home License* window:
 - change the Setting to "Foster Home"
 - change the Facility Type to "Foster/Adoptive Home"
 - change the Status to "Pending Acceptance"
 - check the "Subsidy" box, if not already
 - select the applicable type(s) from the Program Types grid
 - enter today's date in the applicable "From" field(s) that correspond with Program Type(s) you selected in the grid

3. Click the **Save and Submit** link in the **NAVIGATION PANE**.
If the home is missing criteria required for foster home certification, a list will display with information needed. This information must be entered before the foster home can be submitted for approval.

If all data is complete, complete the approval To-Do and submit to your unit approver.

4. Upon approval, click the refresh list link on your workload. *The home will now be able to receive adoption subsidies and foster board payments under a single Vendor ID and Case ID number. You may also print the license if needed.*

Note: If the foster portion of a dual purpose home system closes due to a lapsed recertification, the foster portion can be reopened under the adoption subsidy case. See **How to Reopen a Home**.

How to Close the Foster Portion of a Dual Purpose Home

If the parents in a dual purpose home no longer wish to foster, the foster home portion of the home is closed.

Step-by-Step: Closing the Foster Portion of a Dual Purpose Home

1. On your workload, select the FAD stage which you want to change and click the **Close Home** link in the **NAVIGATION PANE**. *The Close Home window will open.*
2. If the home was previously closed (a record will display), click the **New** button. *A blank Close Home window will open.*

3. Click the **Closure Report** link in the **NAVIGATION PANE**. *The narrative template will open.*
4. Enter the reason for closing and close the window using the red "X" at the top right. *The Close Home window will re-display.*
5. Select the appropriate values in the **Closure Reason, Closure Type, Recommend Re-Opening** fields and then click the **Save & Submit** link in the **NAVIGATION PANE**.
6. A Close Home pop-up window will display and ask if you want to close both the foster/adoptive and subsidy/KinGap home. Click the **NO** button. *The To-Do Detail window will display.*
7. Enter any comments and click the **Save & Close** button. *An approval To-Do will be sent to your unit approver.*
8. Upon approval, the foster portion of the dual purpose home will close. Click the [refresh list](#) link on your workload.

How to Close a Home

When foster parent(s) decide they no longer wish to foster, or circumstances change and they cannot foster, it is necessary to close the home. Closing the home is preferred over allowing the certification to lapse which will system close the home.

Step-by-Step: Closing a Home

1. On your workload, select the FAD stage you wish to close and click the **Close Home** link in the **NAVIGATION PANE**. *The Close Home window will open.*
2. If the home was previously closed (a record will display), click the **New** button. *A blank Close Home window will open.*
3. On the *Close Home* window, click the **Closure Report** link in the **NAVIGATION PANE**. *The narrative template will open.*
4. Enter the reason for closing, and close the window using the red "X" at the top right. *The Close Home window will re-display.*
5. Select the appropriate values in the Closure Reason, **Closure Type, Recommend Re-Opening** fields and then click the **Save & Submit** link in the **NAVIGATION PANE**.

6. A pop-up window will ask if you have completed the Closing Summary Report – click on the **Yes** button *The To-Do Detail window will display.*
7. Enter any comments and click the **Save & Close** button. *An approval To-Do will be sent to your unit approver.*
8. Upon approval, the foster home will close. Click the [refresh list](#) link on your workload. *The home will no longer display on your workload.*

How to Change the 'Resource Legal Name' of a Home

Sometimes a foster parent's circumstances change necessitating that you change the home's resource legal name.

Step-by-Step: Changing the Resource Legal Name of a Home

1. On your workload, select the FAD stage you want to change and click the **Person List** link in the **NAVIGATION PANE**. *The Person List window will open.*
2. On the person grid, select the person whose name you want to change. *The detail section of the window will display.*
3. In the detail section, click the **AKA Names** tab.
4. In the **First Name** and **Last Name** fields, enter the correct name.
5. Check the **Primary** checkbox, click the **Add** button, then click the **Save and Close** button. *You will return to the workload with the previously selected FAD stage still highlighted.*
6. Click the **Change Case(Stage) Name/CD** link in the **NAVIGATION PANE**.
7. On the pop-up window, select the correct name from the dropdown list, and click the **Save and Submit** button. *The To-Do Detail window will display.*
8. Enter any comments and click the **Save & Close** button.
9. Upon approval click [refresh list](#) on your workload. *The new name of the home will display.*

How to Print Historical Home Licenses

On occasion a foster home's license or certificate is not printed out at the time it is certified, or the foster parent may request a copy after a recertification. There are two different paths for printing an historical license depending on whether the home is in Accepted Active or in Closed status.

Step-by-Step: Printing Historical Home Licenses

If the home currently is on your workload:

1. On your workload, select the home that needs the historical license.
2. Click the **Stage Events** tab (below the workload grid).
3. In the **Description** column, enter "ch." *One or more events described as "Changed home status to Approved Active" will display.*
4. Click on the "Changed home status" event with the Event Date that corresponds to the license request and then click the **Detail** link in the **NAVIGATION PANE**. *The Home License window will display.*
5. On the *Home License* window, click the **Historical FA Home Certificate** link. *The historical home license will display.*
6. Click the print icon.

If the home is no longer on your workload or is closed, access through Case Search:

1. Select the **Case/Stage** command in the **Search/Maintain** dropdown list on the main CONNECTIONS window. *The Case/Stage Search window will display.*
2. Enter the Case ID number and click the **Search** button. *The Case List grid will display below.*
3. Click the row with that contains case information. *Tabs will display below.*
4. Click the **Case Events** tab and then follow Steps 3-6 in the section immediately above.

How to Re-Open a Home

It may be necessary to re-open a home at the request of the foster parent, or if the home system closed due to a lapse in certification. This is a multi-step process.



Note: *When a home system closes, it is necessary to wait overnight for a batch file to run in CONNECTIONS before the home can be re-opened.*

Step-by-Step: Re-opening a Home

Locate the home in CONNECTIONS:

1. Select the **F/A Home** command in the **Search/Maintain** dropdown menu on the main CONNECTIONS window. *The F/A Home Search window will display.*
2. On the *F/A Home Search* window, enter LASTNAME, FIRSTNAME in the **Home Name** field then click the **Search** button. *The F/A Home Search List will display.*
3. Select the row with the Resource Name that is the best match. *The Home Demographics tab will display.*
4. Review the data including address, phone, Vendor ID number, Resource ID number and Setting to make certain this is the home that should be re-opened.
5. Click the **Re-Open Closed Home** link in the **NAVIGATION PANE**. *The Re-Open Home window will display.*
6. Click the dropdown arrow in the **Change To** field and select "Applicant" (it is also OK to select "Inquiry" but if the home just closed, it is not necessary to go back to the starting point of Inquiry).

Assign the home:

7. Click the **Save & Assign** link in the **NAVIGATION PANE**. *The Assign window will open.*

PRIMARY ROLE

On the **Assignments** grid, your name will automatically appear with a role of Primary.

SECONDARY ROLES

If you want to add a Secondary worker, check the **Available Staff** grid to see if that worker's name is displayed:

- If it is displayed, select the name, click the **Secondary** button, and click the **Save & Close** button.
 - If it is not displayed, click the **Staff Search** link in the **NAVIGATION PANE**; enter the First and Last Name on the *Staff Search* window and click the **Search** button. Select the correct name from the returned list of matches, review the data including detail, and if this is the correct person, click the **OK** button. *The selected staff person's name now displays on the Available Staff grid.*
 - On the **Available Staff** grid, select the name, click the **Secondary** button, and click the **Save & Close** button.
8. Click on the red "X" at the top right of each window to close the *Assign* and *F/A Home Search* windows. *Your workload will display.*
 9. On your workload, click the refresh list link. *The home will display at the top of your workload with a red "Y" in the **New** column.*

Begin to confirm data and update where necessary:

10. Select the home on your workload and click the **Person List** link in the **NAVIGATION PANE**. *The Person List window will display.*
11. One at a time, select the adults in the home 18 years old and older, and click on the **FA Home Person Detail** tab: verify that the **Fingerprint Date Sent/Date Received** fields and the **Medical Exam Date** field are complete and current.
12. If any revisions were made on the **FA Home Person Detail** tab, click the **Save & Close** button; otherwise, close the *Person List* window.
13. On your workload, with the stage selected, click the **Licensing Information** link in the **NAVIGATION PANE**. *The Home License window will display.*
14. Confirm that the following fields are correct:

- Age Ranges - use the up/down arrows in the **Year** fields to make changes
- Capacity
- Program Types
- The "From" date for each Program Type selected (Therapeutic, Special Needs, Regular, and/or Emergency)

15. Click the **Save & Close** button.

16. On your workload, with the stage selected, click the **Home Demographics** link. *The Home Demographics window will display.*

17. On the **Current Home Demographics** tab verify that the **Vendor ID** field displays the correct VID.

If the home was last open with a different agency, the VID will need to be replaced:

- Check the **Use as Business** box
- Enter your VID
- Click the **Validate** button, **Accept** the address, and click the **Save & Close** button.



Note: A home that was last open with a different agency will display the previous agency in the **Authorizing Agency** field on the *Current Home Demographics* window until the home is placed in "Accepted Active" Status. Once this occurs, your agency's name will display in that field.

Complete/Update the Home Study:

18. On your workload, with the stage selected, click the **Home Study** link. *The Foster and Adoptive Home Record Summary window will display.*



Note: if there is a pop-up window asking you to choose between "New" or "Use Prior," **always** select "Use Prior" to access the existing Home Study. If a blank template is desired, select "New" and the existing home study will be deleted and replaced with a new, blank template.

19. On the **Home Study Narrative** tab, in the **Reason(s) for Home Study** section, check the appropriate reason and click the **Save** button.
20. In the **Home Study Narratives** section, select the home study template that your agency uses, and click the **Retrieve/Edit Narrative** button. *The FRS Home Study narrative window will display.*
21. If the previous Home Study displays, you may update the information in any of the categories. Before doing so, enter a date before the original Home Study narrative then enter today's date before the updated narratives at the start of the new paragraph.
22. Close the window using the red "X" at the top right of the narrative window and click the **Yes** button to save changes. *The Foster and Adoptive Home Record Summary window will display.*

Verify/Complete Clearances:

23. *On the Foster and Adoptive Home Record Summary window, click the **Household Member Detail** tab. Confirm that all adults 18 years and older have the following required info: Medical Exam Dates, Finger Print Cards Sent, FP Cards Rec'd, FP Results, SCR DB Check Sent, SCR DB Check Rec'd, and SCR Clearance Results.*
24. If FP Results, SCR DB Check Sent, SCR DB Check Rec'd, and SCR Clearance Results have not yet been entered, enter them in the grid by clicking in the blue box under each heading in the grid, selecting the correct response from the dropdown list, and clicking the **Save** button.

Submit for approval:

25. On the *Foster and Adoptive Home Record Summary* window click the **Submit** button. *The Home License window will display.*
26. Select "Pending Acceptance" in the **Status** field then click the **Save & Submit** link in the **NAVIGATION PANE**. *The To-Do Detail window will display.*
27. Enter a Comment if you want, and click the **Save & Close** button. *A To-Do is sent to your supervisor.*

28. Upon supervisory approval, click the refresh list link on your workload. *Your agency's name will display on the **Auth Agency** field on the Home Demographics window.*

Print the new license:

29. On your workload, click the **Licensing Information** link in the **NAVIGATION PANE**. *The Home License window will display.*
30. Click the **F/A Home Certificate** link in the **NAVIGATION PANE**. *The Home License window will display.*
31. Click the print icon.

How to Correct a Home's Authorization "From" Date

When a home that system closed is reopened, the authorization From Date can be set back to the date the home closed. This will prevent reimbursements to foster parents being interrupted.



Note: The home must be in "Accepted Active" status.

Step-by-Step: Correcting a Home's "From" Date

1. On your workload, select the FAD stage you want to back date and click the **Home History** link in the **NAVIGATION PANE**. *The FA Home History window will open.*
2. In the home history grid, click the top date/row. *A pop-up window will display stating: The most current row was selected. Only the Auth From date may be modified.*
3. Click the **OK** button. *The **Home History Detail** section displays below the home history grid.*
4. In the **Auth From** field, click the dropdown arrow and use the calendar to select the date the home closed.
6. Scroll down to the bottom of the **Home History Detail** section, and click the **Save & Close** button.

For Supervisors: How to Reject a Pending FAD Approval

After a home has been submitted for supervisory approval, the supervisor may want revisions to be made by the worker. This requires the supervisor to reject the approval request.

Step-by-Step: Rejecting a FAD Approval

1. On your **My To-Dos** tab, click the navigate link on the approval To-Do. *The Close Home window will open.*
2. After reviewing the Closure Report, click the red "X" to close the *Close Home* window. *The Approval Status window will open.*
3. Click the approval in the approval grid.
4. Enter a comment in the narrative box explaining why the request for approval is being rejected. A comment must be entered in order for the **Reject** button to enable.
5. Click the **Reject** button then click the **Save & Close** button.

Resources:

NYS OFT Enterprise
Help Desk #
1.800.697-1323

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

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

CONNECTIONS Communications
CONNECTIONSCommunications@dfa.state.ny.us

Within CONNECTIONS:
[Help/Training](#) link → How Do I → FAD

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