



CONNECTIONS Tip Sheet

Linking a Family Service Intake

July 2009

When a Family Service Intake (FSI) is created from the Options menu on the Workload window, such as when a family applies for Preventive Services, a new Case Number and Stage

Number are created for the FSI. No information is pre-filled when the FSI is created in this manner. All data must be manually entered.

A thorough search should be conducted on all persons added in the Person Demographic tab. When a match – or more than one match - is found in the database, the new identity should be **related** to the existing identity. This reduces the number of multiples and keeps all a person’s history together – essential for making good safety decisions and

accessing past stages through the Implied Role path.

If a family has had prior involvement with the Child Welfare system, the new FSI should also be **linked** to a previous case so that overall case history is preserved. An FSI can be linked with either an active or a closed case.

To link an FSI stage with a previous case, three conditions must be met.

- The FSI must originate from the CONNECTIONS Toolbar, not from a CPS investigation.

- There must be at least one person over the age of 18 in common.
- There can not be another open FSI or Family Services Stage (FSS) in the case in the same district.

STEPS FOR LINKING AN FSI

1. Select an adult from the Person Demographics List in the FSI
2. Use the pull-down menu under Stage Maintenance to select “Link this FSI Stage to Active of Closed Case Number”



Family Services Intake - S:29300000/C:39300000

Case Name: Amy Green

Intake Source: Relationship Matrix

Person Demographics

Person Information: First: Amy, Middle: , Last: Green, Sex: Female, Marital: , *DOB: 5/10/1962, Age: 46, Language: English, DDD: 4/2/2009, SSN: , Religion:

*Ethnicity/Race: Not Reported, Indian, Japanese, Korean, Other - Asian, Central Americ, Caribbean, Cuban, Native Hawaiian, Dominican, White, Not Reported

Address: Street: 50 W 56TH ST, PO Box/Apt: , City: NYC, State: New York, Zip: 10019-8259, County: MANHATTAN, Type: Residence, CD: 05

Phone Information: Phone: (212) 545-5656, Ext: , Type: Residence

Name	Person ID	Sch	D.O.B.	A	Age	SSN	Marital Status	Language	Religion	Race
Green, Amy	15200380	R	05/10/1962	N	46			English		Not R

Buttons: Incoming Detail, Search, Add Person, Modify Person, Delete Person, Cancel, Close

- In the resulting window, select the case to which you wish to link the FSI

Link This FSI Stage to Active or Closed Case Number

File Options Help

Person Name: Green,Amy Upon closing, the new case number for this stage will be:

Person ID: 15200380

Case ID	Status	Case Name	District	Date Opened	Date Closed
▶ 35200088	Open	Green,Amy	MANHATTAN	09/28/2004	

Link to Case Remove Link Close

- Click the “Link to Case” button

Link This FSI Stage to Active or Closed Case Number

File Options Help

Person Name: Green,Amy Upon closing, the new case number for this stage will be: 35200088

Person ID: 15200380

Case ID	Status	Case Name	District	Date Opened	Date Closed
▶ 35200088	Open	Green,Amy	MANHATTAN	09/28/2004	

Link to Case Remove Link Close

The case number will appear in the “Upon closing the new case number for the stage will be” field on this window and in the corresponding field on the Decision Summary window.



The FSI is not linked to the chosen case until you stage-progress the FSI to an FSS.



To avoid unnecessarily starting an FSI, do a thorough search of the persons listed on the Application for Services BEFORE you click on “Record Family Services Intake” to be sure they are not already part of an open stage.

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

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Help Desk #
1.800.697-1323