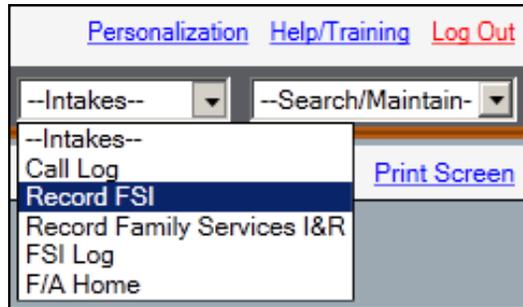




When a Family Service Intake (FSI) is created from the Search/Maintain menu on the Workload window - such as when a family applies for Preventive Services - a new Case Number and Stage Number are created for the FSI.



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

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.

Conditions for Linking an FSI

An FSI can be linked to either an active or a closed case.

In order to link an FSI stage with a previous case, three conditions must be met:

- ▶ The FSI must originate from the Search/Maintain menu, not from within 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.



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



Reminder: To avoid unnecessarily starting an FSI, do a thorough search of the persons listed on the Services Application *BEFORE* you click the **Record FSI** link to be sure they are not already part of an open FSI or FSS stage.

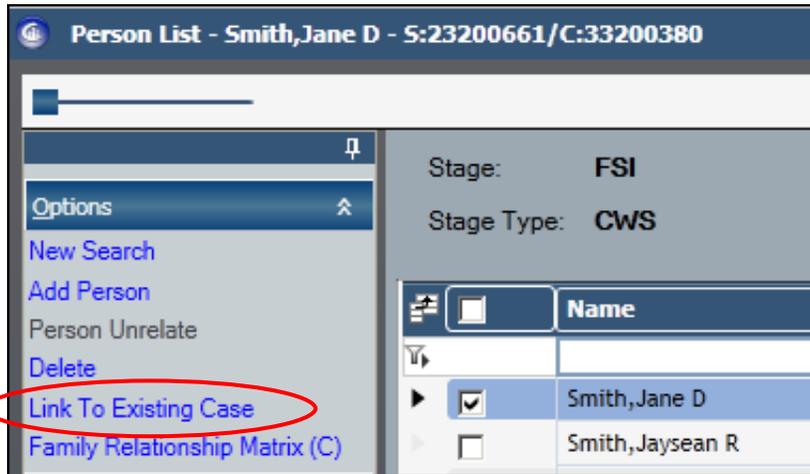
When populating the Person List, a thorough search should be conducted on each person added to the FSI. When a match is found in the database, the new FSI identity should be **Related** to the existing identity. This prevents the creation of an additional Person Identification Number (PID) for the person and keeps all their child welfare history together under a single PID— essential for both making good safety decisions and for accessing past stages through the Implied Role path.



Step-by-Step: Linking an FSI to Another Case

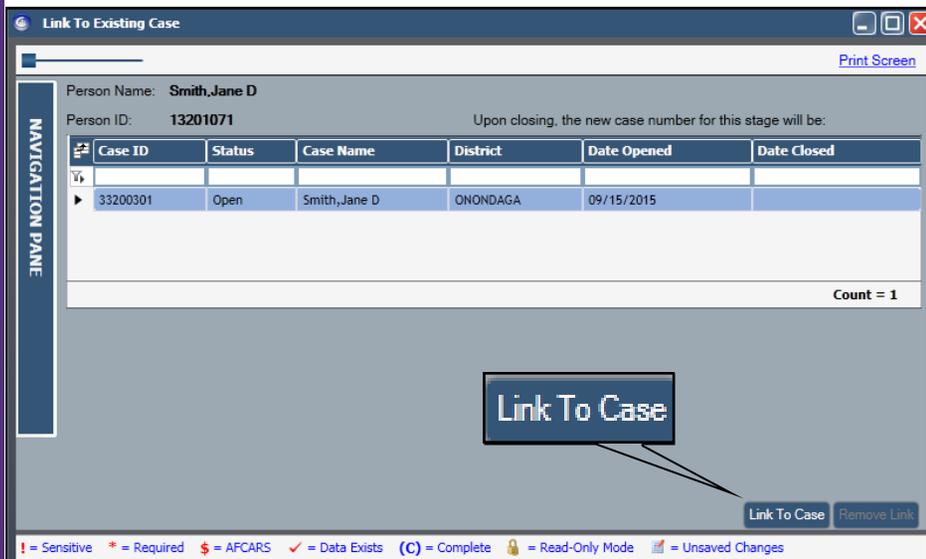
1. Select the FSI stage on your workload.
2. Click the **Person List** link in the navigation pane.
3. Select an adult from the Person List in the FSI.

4. Click the **Link to Existing Case** link in the navigation pane.

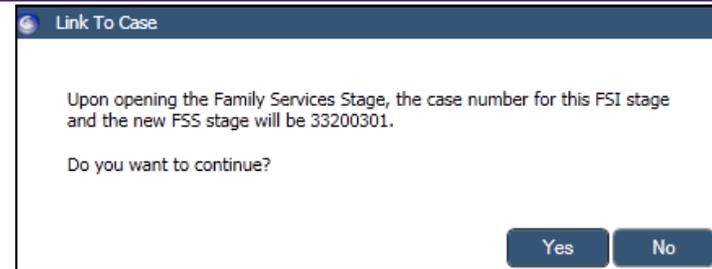


5. In the resulting window, select the case to which you wish to link the FSI.

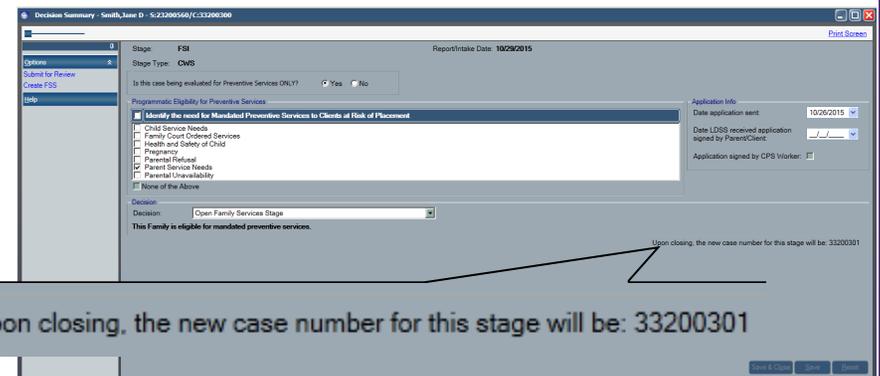
6. Click the **Link to Case** button.



7. Click **Yes** to the resulting pop-up message.



The linked case number will appear in the note on the Decision Summary window. **The FSI will be linked to the chosen case once you stage-progress the FSI to an FSS.**



Upon closing, the new case number for this stage will be: 33200301

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