CONNECTIONS Tip Sheet *Permanency Hearing Report Procedure*

New York State Law requires that workers create and file a Permanency Hearing Report (PHR) with the court prior to a child's permanency hearing and send the report to required parties at least 14 days in advance of the Date Certain. The PHR serves as the means to notify the court and those parties of a family's progress and to provide them with specific up-to-date information about the subject child(ren). This tip sheet provides you with procedural steps to efficiently complete accurate Permanency Hearing Reports.

1. Decide Which Type of PHR to Launch

When deciding whether to launch an Individual Child Report, Multiple Child Report, or Freed Child Report, consult any other assigned workers (if necessary) and use the following guidelines and considerations:

- ✓ *A child may be involved in only one PHR at a time.*
- ✓ *For a Multiple Child Report, all subject children must have the same Date Certain.*
- ✓ *A Multiple Child Report should not be used when there are confidentiality issues that preclude any party from seeing a Permanency Hearing Report about a child (e.g., when a sibling group has multiple fathers).*
- ✓ *A Freed Child Report can only be launched for a child in a CCR stage.*

2. Review and Verify Case Information

Whether or not you choose to pre-fill the PHR, certain case information will populate the report (e.g., case/stage identifiers, demographics, family relationships and PPG). This data is not modifiable within a launched PHR. Therefore, it is critical that you verify/correct case information within CONNECTIONS before launching the report.

- ✓ *Verify the accuracy and completeness of the Stage Composition, including demographic information and the Family Relationship Matrix.*
- ✓ *Verify the Program Choice(s) and Permanency Planning Goal (PPG) for each child and update them if needed.*
- ✓ *Verify that CCRS legal activities for each child have been entered, especially the most recent permanency hearing held and the associated modifier of the Date Certain for the next scheduled permanency hearing.*

3. Decide Whether to Pre-fill the Report

You have the option to pre-fill Permanency Hearing Reports with specific information from CONNECTIONS.

No Pre-fill

If you select the "No Pre-fill" option, only case/stage identifiers, demographics and PPG will populate the report.

Pre-fill

If you select the "Pre-fill" option, CONNECTIONS will populate many of the report responses with answers from the last *approved* FASP, Plan Amendment or Removal Update, as well as information from the Health Services and Education modules. Pre-fill information is modifiable.

- ✓ *If you select the "Pre-fill" option, update Health Services and Education information as needed prior to launching the PHR.*

4. Review and Update Outside Participants

CONNECTIONS also supports hearing notices to the required parties and the required statement to the court.

- ✓ *Add Outside Participants to the FSS stage to enable you to select them as recipients of the PHR and/or Notification of the permanency hearing, and provide the court with an accurate statement of who received the report and/or hearing notice. (Options menu>Add Outside Participants)*

5. Launch the Permanency Hearing Report

Any worker with a role in a stage where a child has a Program Choice of "Placement" or "Non-LDSS Custody" can launch a Permanency Hearing Report.

- ✓ *Access the Permanency window.*
- ✓ *Select the child(ren).*
- ✓ *Select "Pre-fill" or "No Pre-fill."*
- ✓ *Launch the report.*
- ✓ *Make sure all launch edits are passed and that no error messages display.*

6. After Launch Review

If you discover non-modifiable, pre-filled information that is not accurate, you can simply delete the report, make any needed changes in CONNECTIONS, then launch a new report.

If you selected the "Pre-fill" option, thoroughly review all pre-filled responses in order to determine whether they are timely, accurate, appropriate and fully respond to the question.

- ✓ *Review the pre-filled information to verify its accuracy.*
- ✓ *Delete any content of a confidential nature to which one or more of the parties is not entitled.*
- ✓ *Modify the narrative responses with the most up-to-date information. (Modifiable information displays in gray highlighting.) Make sure that the responses are cohesive, accurate, current, essential, and conform to confidentiality standards.*

7. Finalize the Permanency Hearing Report

Since a PHR cannot be modified once it is marked "Final," it should remain in "Draft" status until the review and approval process required by your local district or agency is complete.

- ✓ *Make all appropriate modifications to the "Draft" report.*
- ✓ *Complete the local review, if applicable. Use the Mail Local Copy function to email the report to yourself, and then add password protection before emailing it to necessary reviewers. (If you are an ACS worker, see the Tip Box to the right.) → →*
- ✓ *Mark the report "Final" in CONNECTIONS.*
- ✓ *Print the report and file it with the court before the Date Certain.*
- ✓ *Mail the report to required parties. The PHR and Notice must be mailed to the permanency hearing Date Certain.*

8. Generate the Permanency Hearing Notices and Statement

- ✓ *Record Court/Petitioner information.*
- ✓ *Select Invitees and Outside Participants.*
- ✓ *Complete the Associated Child window, (if applicable).*
- ✓ *Print and Send Notices and Statement*

Permanency Hearing Report Resources

For additional information on completing Permanency Hearing Reports, the following resources are available:

- The *Build 18.9 Permanency Hearing Report Job Aid* provides comprehensive information on the Permanency Hearing Report, including step-by-step instructions. You can access the Job Aid by clicking on the **Job Aids/Tip Sheets** link on the Step-by-Step/Job Aids/Tips page of the OCFS CONNECTIONS intranet site (http://ocfs.state.nyenet/connect/jobaides/).

  ***** Appendices A, B and C of the Job Aid contain detailed information on which report fields are pre-filled with non-modifiable and modifiable data; and the parts of CONNECTIONS from which the information was populated.
- OCFS Administrative Directive: *08-OCFS-ADM-01* contains policy information on the Permanency Hearing Report. You can access this Administrative Directive—and others— by clicking on the **Policies – External** link on the OCFS intranet site.
- *A Guide for Caseworkers: Completion of the Permanency Hearing Report* is an important tool that contains information on report timeframes and contents, providing notice, and much more. The following Internet address can be used to access the guide:

  http://www.ocfs.state.ny.us/main/legal/legislation/permanency/caseworkerguide.asp

ACS workers and contract agency workers serving an ACS case must use the Mail Local Copy process to upload Permanency Hearing Reports to the Legal Tracking System (LTS). Once you have a copy of the report on your desktop (after using the Mail Local Copy function), use the same steps currently in place to upload the report to LTS.

Agency workers should submit the "Draft" version of the report to LTS so that they can make corrections if an ACS attorney so desires.

The report should be marked "Final" and saved *without making any additional changes* only after the worker completing the report is notified by the ACS attorney that the report has been approved.

If you need assistance performing any of the functions on this tip sheet, please talk to your supervisor or contact the NYSOFT Enterprise Help Desk by calling 1.800.697.1323 or contact the CONNECTIONS User Support/Triage staff by emailing ocfs.sm.conn_app@ocfs.state.ny.us.

Step by Step Instructions for Completing Permanency Hearing Reports

To Launch a Permanency Hearing Report

1 Click on the **WORK** button on the CONNECTIONS Toolbar.
The Assigned Workload displays.

2 Select the FSS stage and click on the **Tasks…** button.
The Family Services Stage window displays.

3 Click on the **Permanency** tab.
The Permanency window displays.

4 Select a child(ren) from the Child List.
*The **Launch** button and field enable. "Pre-fill" is automatically selected.*

5 If you do not want a pre-filled report, click on the drop-down arrow in the **Launch** field and select "No Pre-fill."

6 Click on the **Launch** button.
If all edits are passed, the Permanency Hearing Report displays in the Permanency Report window.

To Modify a Permanency Hearing Report

1 Click on the **WORK** button on the CONNECTIONS Toolbar.
The Assigned Workload displays.

2 Select the FSS stage and click on the **Tasks…** button.
The Family Services Stage window displays.

3 Click on the **Permanency** tab.
The Permanency window displays.

4 Select a child(ren) from the Child List.
The Permanency Report Summary grid populates with all previously saved reports for the selected child(ren).

5 Select the Permanency Hearing Report from the grid by clicking on the box to the left of it.

6 Click on the **Detail** button.
The Permanency Hearing Report displays in the Permanency Report window.

7 Make the appropriate changes to the report.

8 Click on the **Save** button to save the changes.

9 Click on the **Close** button to close the *Permanency Report* window.

To Email a Permanency Hearing Report to Yourself

1 Select a report on the **Permanency Report Summary** grid *on the Permanency* window.

2 Select the **Mail Local Copy** command and **Permanency Hearing Report** sub-command in the **Options** menu.
*The **Email Report** dialogue box displays*

3 Select "Yes." --- *The selected PHR is sent as an attachment to an email to your Inbox. (Note: your email address must be listed in the Global Address Book for this operation to work.)*

To Password Protect a Permanency Hearing Report

Apply password protection to the PHR that you emailed to yourself before forwarding it to others. This requirement is crucial to avoid revealing confidential material to unauthorized individuals if the report/email is sent to the wrong email address(es).

1 Navigate to your Inbox and locate the system-generated email with the attached PHR.

2 Open the PHR by double-clicking on it.
The report displays in Microsoft Word.

3 Click on the **File** menu and select **Save As**.
The Save As dialog box displays.

4 Enter a file name in the **File Name** field and select the desired location (e.g., drive, folder) where you wish to save the report.

5 Click on **Tools** and select **General Options**.
The Save window displays.

6 Under **File sharing options for <File Name>**, enter a password to open the report and/or a password to modify the report. You can also check the **Read-only recommended** checkbox, which will prompt the person opening the report to do so in read-only mode.

7 Click on the **OK** button.
The Confirm Password window displays.

8 Reenter the password you selected to confirm it and click on the **OK** button. --- *The Save As window displays.*

9 Click on the **Save** button.
The Save As window closes and focus returns to the report window. The report is now protected so that it can be forwarded to the appropriate individual(s). Inform those individuals of the password needed to open the document. ALWAYS send the password in a separate email from the one that is used to forward the report.