CONNECTIONS Tip Sheet

Progress Notes: Create and Modify

August 2009

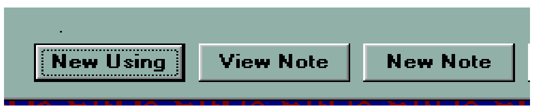
Creating a Progress Note

1. Select a CPS Investigation stage (INV) or Family Services stage (FSS) from the *Assigned Workload* (Progress Notes button enables)

2. Click on either the **Tasks…** button or the **Progress Notes** button.

   *When using the **Progress Notes** button……*
   - *In an **Inv** stage, the Child Protective Record Summary (CPRS) appears with the Progress Notes window open.*
   - *For an **FSS** stage, only the Progress Notes window is displayed. While in this window, clicking on the Close button will return you to the Assigned Workload window. In order to access the case, click on the **Tasks** button.*

The Progress Notes window is comprised of three sections: the Search Progress Notes fields at the top of the tab, the Search Results grid in the middle, and buttons along the bottom.



3. To create a new note, click on the **New Note** button (or select from the Options menu).

4. To create a note using **New Using**, select a note from the grid and click on the **New Using** button (or select from the Options menu).

The *Progress Notes Detail window displays with the Type, Method of Contact, Location of Contact, Other Participant and Purpose fields pre-filled from the selected progress note*.

5. When creating a note, enter the Event Date. The default date appears. By clicking on the drop-down box, the calendar appears and an alternate date can be chosen. Some districts require the time be entered as well.

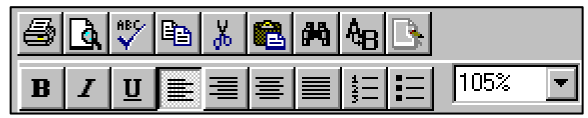
   Enter the Type, Method of Contact and Purpose information on the *Progress Notes Detail* window.

6. After completing and/or modifying the fields, use the checkboxes to indicate Family Participant(s). When a family member has been chosen as a participant, the Focus field will automatically be pre-filled with the family member as the focus. If a family member participated but was not a focus of the contact, the focus field must be manually unchecked. The Focus boxes can be used to indicate someone who was not present at the time, but was the focus of the contact. You can click on "Select All" to save time.

IMPORTANT!: *Enter any identifying information related to contacts with the **reporter/source** in Investigation Stage Progress Notes **only**. Use the "**Other Participant**" data field, with the value of "**Reporter/Source**".*

7. Enter narrative by clicking inside the text box field.

   Narrative fields in CONNECTIONS, which typically contain detailed worker entries, feature a Text Control tool that provides workers with formatting functions similar to those available in Microsoft Word.



   ***Note:** You can also use hot keys (**Ctrl C** for copying, **Ctrl V** for pasting).*

8. To save the note to the stage, click on either **Save as Draft** (allows modifications for up to 20 days) or **Save as Final** (freezes on save).

9. To save this note and create a new note within the same stage, click on **Save and Enter New Note** button.

   A pop-up message says, "Changes Have Been Saved." click OK. The system saves the note in Draft status. Repeat the steps to complete an additional note.

   ***Note:** The save buttons will not be enabled until you have entered a narrative.*

Editing Progress Notes

10. Progress Notes may only be edited if they are in Draft status. Select the Draft note to be modified from the grid of existing notes and click on **Edit Note** button.

If you attempt to change the "Type", a pop-up Message will appear, "Changing the Type of Contact will clear all user entered data with the exception of the narrative, Event Date, Event Time and Author. Do you wish to continue?" Click Yes to modify the "Type".

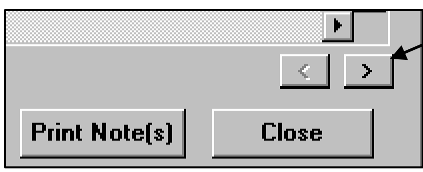
11. Progress Notes in Draft status may also be deleted by the persons who entered or authored them. Select the Draft note to be deleted from the grid of existing notes and click on **Edit Note** button, then select **Delete Draft Note** from the Options pull-down menu.

    A pop-up Message will appear, "Are you sure your wish to delete the Progress Note?" Click Yes to delete the note.

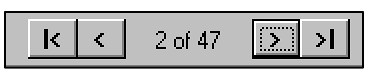
12. If the Progress Note is in Final status, it cannot be modified. You may add to it, however, by using the **Add Addendum** feature. Highlight the desired note from the grid of existing notes and select the **Add Addendum** from the Options pull-down menu.

Viewing Progress Notes

- Only the most recent 200 notes will appear on the Progress Notes grid. If a stage has more than 200 progress notes entered, you can view them by clicking on the arrow at the bottom right side of the screen.

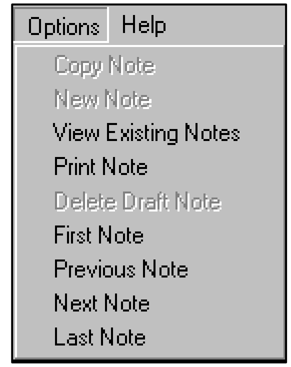


- If the Progress Notes screen has more than one entry in its grid, and the **View Note** button is clicked, a Notes advance set of buttons appears on the Progress Notes Detail screen.



The number of entries on the Progress Notes Detail grid appears as will the location of the particular note, i.e., "2 of 47" as the second of 47 notes. Clicking the far left button |< will display the first note in the grid; the far right button >| will display the last note. The arrow buttons < and > will advance or reverse the displayed Progress Note in numerical progression, depending on the direction chosen.

- The Options drop-down menu also displays choices for reviewing notes: **View Existing Notes, Print Note, First Note, Previous Note, Next Note, Last Note.**



To view more than one note at a time, highlight the notes you wish to view or click on the **Select All** button.

Click on the **Print Note(s)** button. Select the format "**Data Fields and Narrative**". Click **OK.** (*As of 10/10/08, users will have an option to select the font size*).

The notes appear as a print preview. Use the scroll feature to view all of the note(s). When finished viewing click the **Close**, then the **Cancel** buttons.

> **NOTE:** You can print the notes by clicking on the **Print** button in the preview window.

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

Resources:

NYS OFT Enterprise
Help Desk #
1.800.697-1323

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