

NYS Office of Children and Family Services

CONNECTIONS

CONNECTIONS TRANSFORMATION

QUICK START GUIDE

Introduction

The purpose of this quick start guide is to provide experienced CONNECTIONS users with a handy road map for locating windows that you most commonly use in your day-to-day work in the transformed CONNECTIONS application. Therefore, only a small part of the overall changes and improvements being made with the CONNECTIONS Transformation are covered in this guide. You are strongly encouraged to review the CONNECTIONS Transformation Job Aid and complete the CONNECTIONS Transformation web-based training course applicable to your job function. In addition, the [Help/Training](#) link on the new toolbar provides access to a comprehensive set of resources, including: tip sheets, frequently asked questions (FAQ), How Do I documents, the job aid, and this quick start guide.

This guide is divided into eight sections. The first section applies to **all caseworkers**. The subsequent sections apply to staff that perform specific job functions, namely:

- CPS Investigation caseworkers
- Foster and Adoptive Home Development caseworkers
- Preventive Services and Foster Care caseworkers
- Supervisors
- Managers
- Support Staff and Specialists
- LAN Administrators and Security Coordinators

The CONNECTIONS Transformation in a Nutshell

Phase 1 of the CONNECTIONS Transformation will change **only certain parts of CONNECTIONS**, including the workload, To-Dos, events, searches, as well as all the CPS Intake, and several CPS Investigation and FAD windows. In addition, the transformation will introduce **new windows** to help you with your work, such as the Windows Manager and the Home Page as well as several **enhanced features**, designed to make your use of the system easier.

Those windows in CONNECTIONS that will not change with this phase of the transformation include: Child Protective Record Summary (CPRS); Foster Home Record Summary (FRS); Family Services Intake (FSI); and Family Services Stage (FSS). The basic program rules and work processes will remain the same. For the most part, the rules that govern your access to parts of CONNECTIONS will also remain the same.

Using this Guide

This quick start guide contains several screenshots that contain data. This data is fictitious and is presented for demonstration purposes only. The screenshots of the new CONNECTIONS windows were taken during the testing period and are subject to change when the system is implemented. This guide is best reviewed on-line as some details, including colors, may not display on hard copied versions.

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For All Caseworkers

TOOLBAR



Replaced by

Main CONNECTIONS window (new):



The existing toolbar buttons and menus are replaced by the toolbar and other components of the new Main CONNECTIONS window as follows:

<u>Old</u>	<u>New</u>
Intake menu	Intakes dropdown (A)
Options, Maintain, Search, menus	Search/Maintain dropdown (B)
TO-DO button (Staff To-Dos)	WORKLOAD & TO-DOs tab (C) → My To-Dos tab (D)
WORK button	WORKLOAD & TO-DOs tab (C) → My Workload tab (E)
UNIT button	Search Other Units/Workloads (F)
PERS, CASE, RSRC, STAFF buttons	Search/Maintain drop-down (B)
RPTS button	REPORTS tab (G)

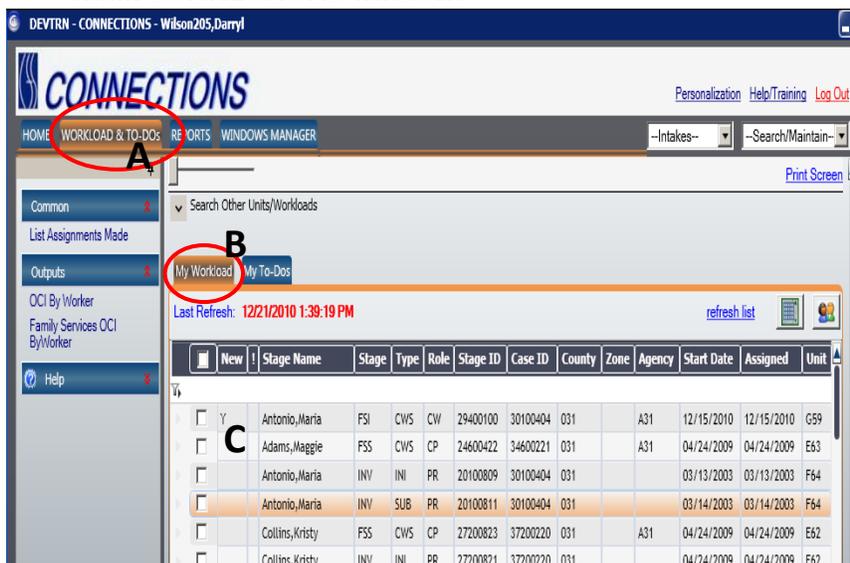
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WORKLOAD

Find the stages on your workload

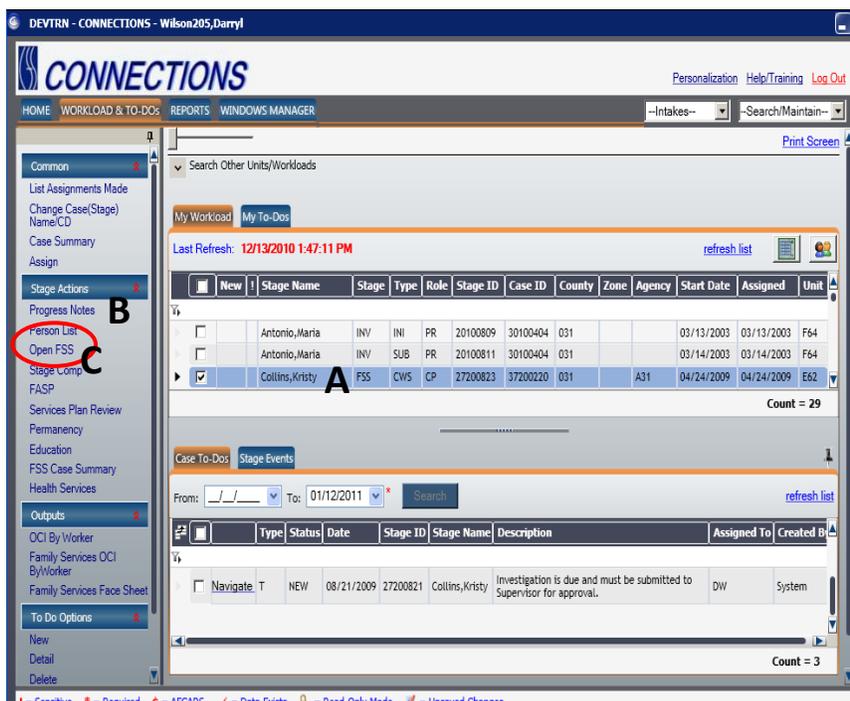
- Log into CONNECTIONS as you do now. The Main CONNECTIONS window will display when the application opens.
- The **WORKLOAD & TO-DOs** tab (A) and the **My Workload** sub-tab (B) will be active.
- The stages on your workload (C) will display under the **My Workload** sub-tab.

Main CONNECTIONS window:



Access a stage on your workload

- Click once into the row to highlight it. The selected stage is now active. (A)
- The **NAVIGATION PANE Stage Actions** section (B) will display links you use to open various task windows for the stage.
- Example: Select the Collins FSS by clicking on the row (A) and click the **Open FSS** link (C) in the **NAVIGATION PANE**. The Collins FSS will open.



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Identify a new assignment

- As now, the workload must be refreshed to see new assignments.
- New assignments will appear on top of your workload.
- The “Y” indicator (A) will display in the **New** column (B) the workload is refreshed.
Note: new stages will no longer be grayed.

	New	Stage Name	Stage	Type	Role	Stage
	Y (A)	Antonio, Maria	FSI	CWS	CW	29400
		Adams, Maggie	FSS	CWS	CP	24600
		Antonio, Maria	INV	INI	PR	20100
		Antonio, Maria	INV	SUB	PR	20100
		Collins, Kristy	FSS	CWS	CP	27200
		Collins, Kristy	INV	INI	PR	27200

Access the Person List for a stage

- Select the desired stage by clicking on the row. (A)
- Click on the **Person List** link in the **NAVIGATION PANE**. (B)
- The *Person List* window for the stage will open. (C)

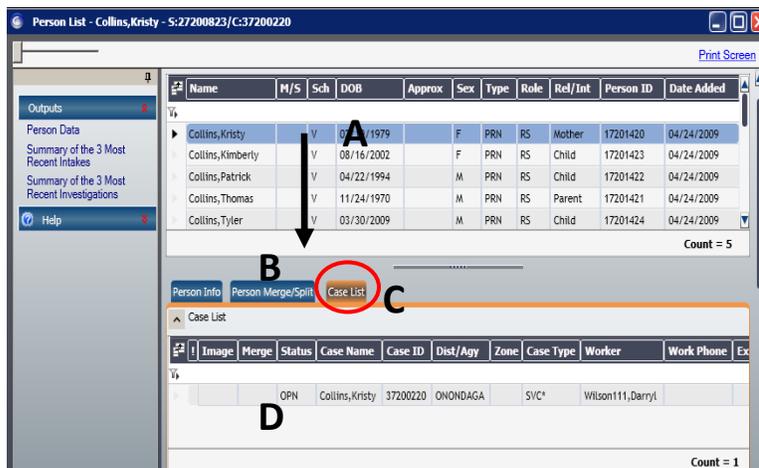
Person List - Collins, Kristy - S:27200823/C:37200220

Name	M/S	Sch	DOB	Appr
Collins, Kristy		V	02/19/1979	
Collins, Kimberly		V	08/16/2002	
Collins, Patrick		V	04/22/1994	
Collins, Thomas		V	11/24/1970	
Collins, Tyler		V	03/30/2009	

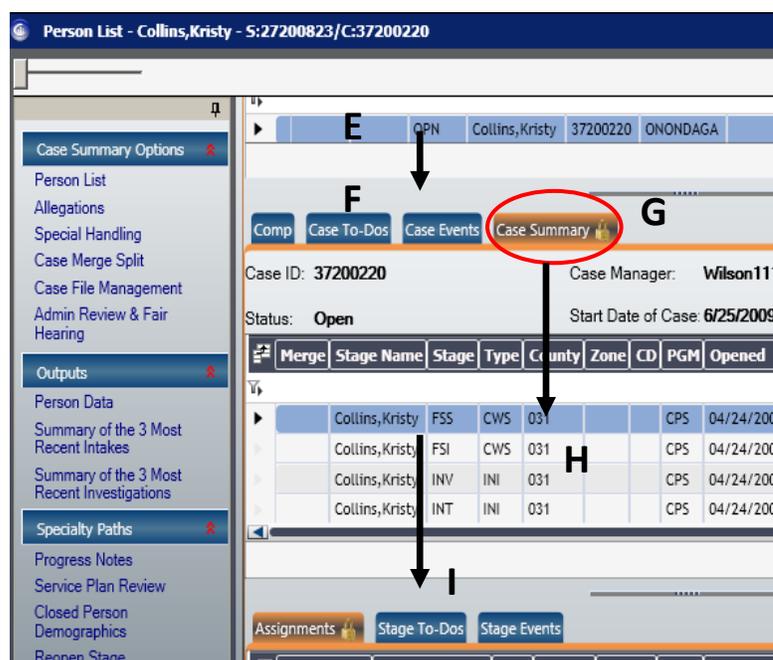
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Access the Case List and Case Summary for a stage

- On the Person List, click on the row of the desired person. **(A)** The **Person Info**, **Person Merge/Split** and **Case List** tabs will display below the person list. **(B)**
- Click on the **Case List** tab. **(C)** The Case List will display. **(D)**



- On the Case List, click on the desired case to select it. **(E)** The **Comp**, **Case To-Dos**, **Case Events** and **Case Summary** tabs will display. **(F)**
- Click on the **Case Summary** sub-tab. **(G)** The stages associated with the case will display. **(H)**
- Select a stage. The **Assignments**, **Stage To-Dos** and **Stage Events** sub-tabs will display. **(I)**



Access stages via implied role

(Also see the *Implied Role* tip sheet – click [Help/Training](#) link)

- Access rules remain the same
- Select stage with person in common → click on the **Person List** link (**NAVIGATION PANE**)
- Select the person in common → click on the **Case List** tab.
- Select the desired Case → click on the **Case Events** tab
- Select the event (e.g., Child Protective Record Summary, or Family Services Stage Opened) and click on the **Detail** link in the **Events Options** section in the **NAVIGATION PANE**.

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Access another worker's workload

Requires Unit Summary security

- Click on the down arrow next to **Search Other Units/Workloads** section header. **(A)** The section will expand and the search fields will display. **(B)**

- Click on the desired values in the search fields and click the **Search** button. **(C)** The list of staff matching the selected criteria will display **(D)**.

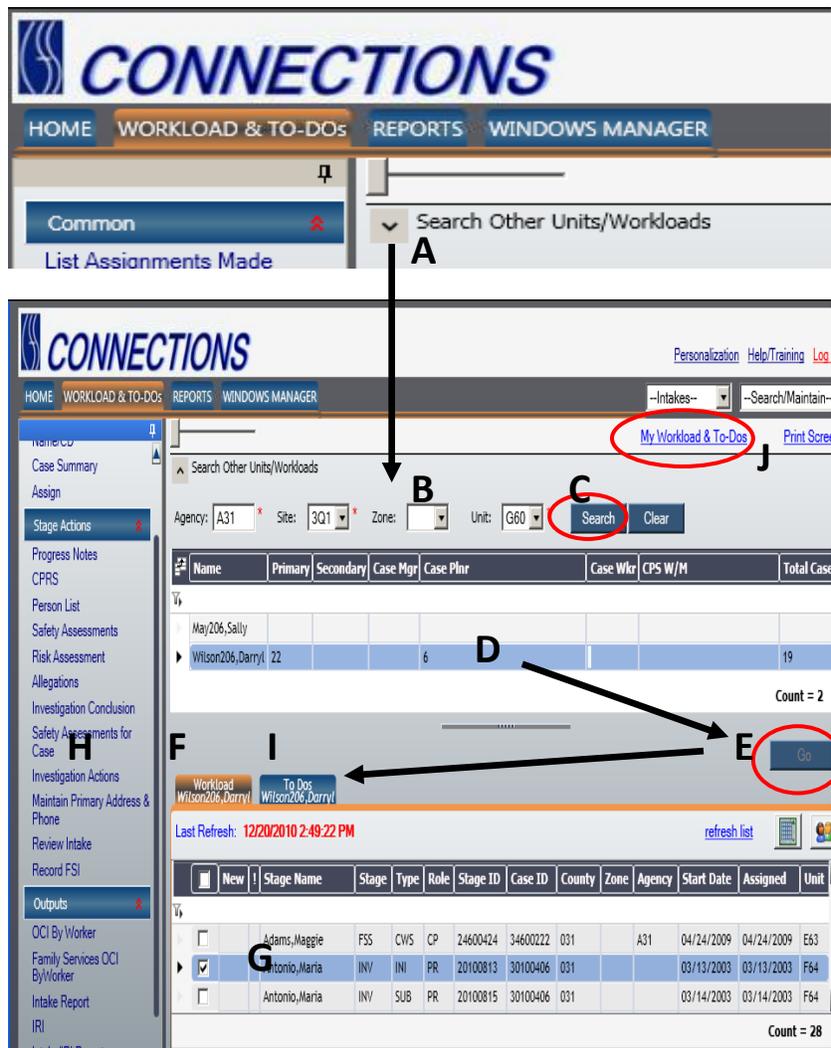
- Select a staff person in the grid **(D)** and click on the **Go** button. **(E)** The **Workload** and **To-Dos** sub-tabs for that person will display with the **Workload** sub-tab active. **(F)**

- On the **Workload** sub-tab, select the desired stage by clicking on the row. **(G)**

- Use the links in the **Stage Action** section in the **NAVIGATION PANE (H)** to access task windows for that stage.

- Click on the **To-Dos** sub-tab **(I)** to see that staff person's staff To-Dos.

- Return to your own workload by clicking on the **My Workload & To-Dos** link on the top right of the toolbar. **(J)**



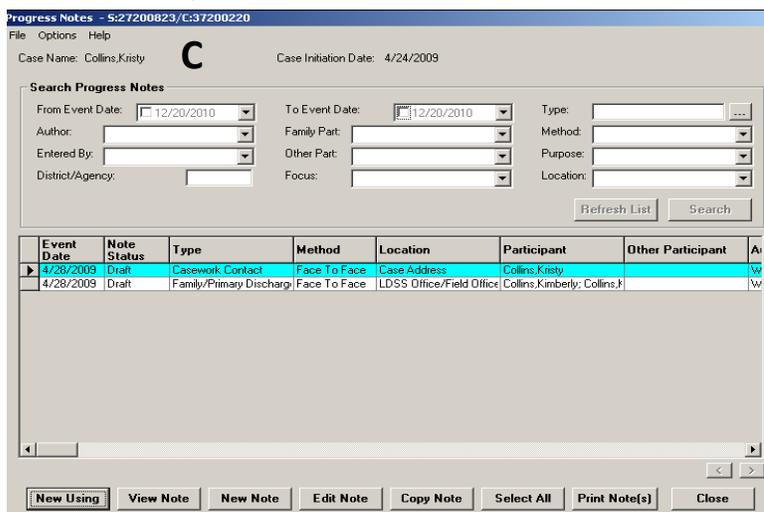
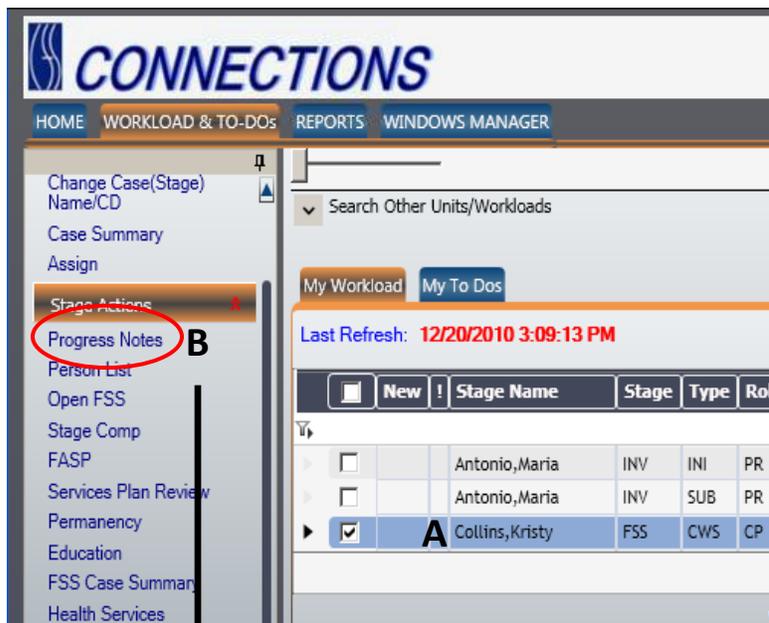
Note: you may only have one staff person's workload open at a time; you may have multiple windows open within that workload.

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ENTER A PROGRESS NOTE

- On the **WORKLOAD & TO-DOs** tab, with the **My Workload** sub-tab active, click on the row of the desired stage to select it. **(A)**
- Click on the **Progress Notes** link in the **NAVIGATION PANE**. **(B)**
- The *Progress Notes* window opens in the selected stage. **(C)**
- Enter a progress note as you do now. You may enter multiple notes in that stage.
- When you close the *Progress Notes* window:
 - In the **Family Services Stage (FSS)** – you will return to your workload.
 - In the **Child Protective Record Summary (CPRS)** – you will remain on the CPRS. Close the CPRS to return to your workload.



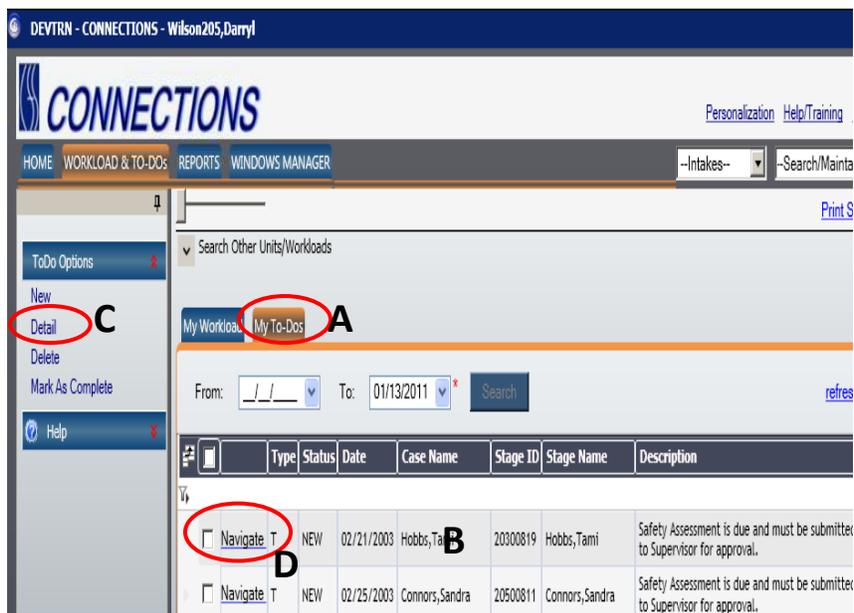
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T0-DOS

Where to find To-Do lists and how to access To-Dos

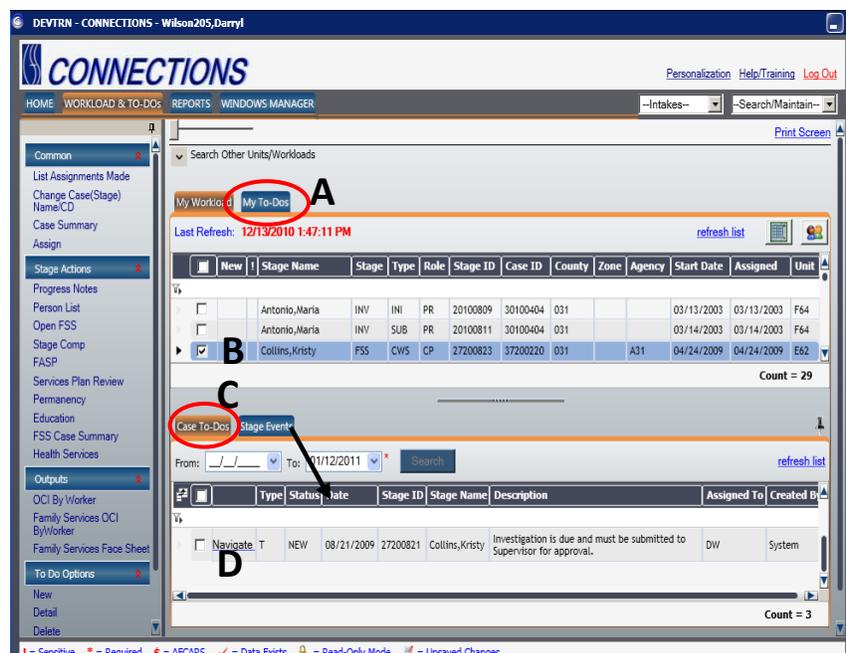
Staff To-Dos:

- On the **WORKLOAD & TO DOs** tab, click on the **My To-Dos** sub-tab. **(A)** Your (staff) To-Dos will display. **(B)**
- To view a To-Do, click on the row to select it and click on the **Detail** link **(C)** in the **NAVIGATION PANE**.
- To access the task to perform it, click on the row to select it and click on the **Navigate** link (Task To-Dos only). **(D)**



Case To-Dos:

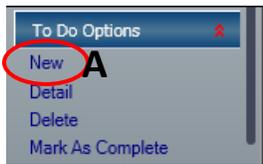
- The **WORKLOAD & TO DOs** tab and the **My Workload** sub-tab must be active. **(A)**
- Click on the row to select a stage. **(B)** The **Case To-Dos** sub-tab **(C)** will display. The list of case To-Dos **(D)** will display under the sub-tab.
- To view the To-Do or perform the task, see Staff To-Dos, above.



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Create a To-Do

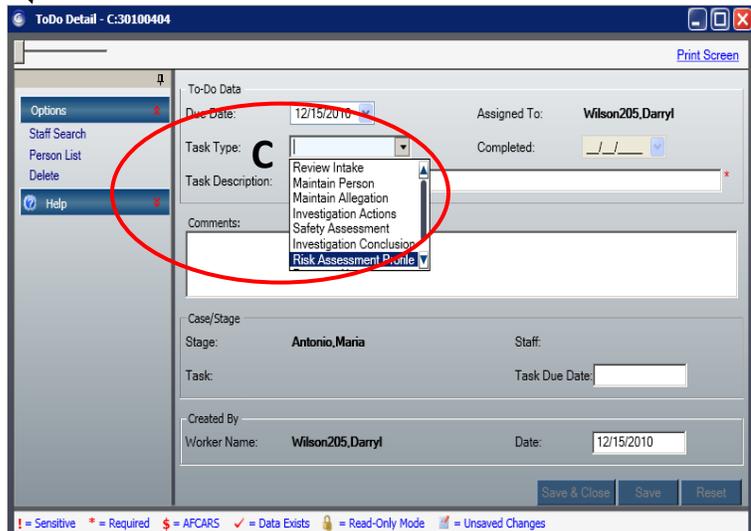
- With a To-Do list active, click on the **New** link (A) in the **To-Do Options** section in the **NAVIGATION PANE**.



- The *To-Do Detail* window will open. (B)

B

- If you are creating the To-Do within an INV or FAD stage, you may designate the To-Do task by clicking on the new **Task Type** drop-down (optional). (C) (This replaces creating the To-Do from the Task List.)

A screenshot of a software window titled "ToDo Detail - C:30100404". The window contains several fields: "Due Date" (12/15/2010), "Assigned To" (Wilson205,Darryl), "Task Type" (a dropdown menu with "Risk Assessment Profile" selected), "Task Description", "Comments", "Case/Stage" (Stage: Antonio, Maria), "Task Due Date", "Created By" (Worker Name: Wilson205,Darryl, Date: 12/15/2010). The "Task Type" dropdown menu is circled in red and has a black letter "C" next to it. At the bottom of the window, there are buttons for "Save & Close", "Save", and "Reset", and a status bar with various icons and text.

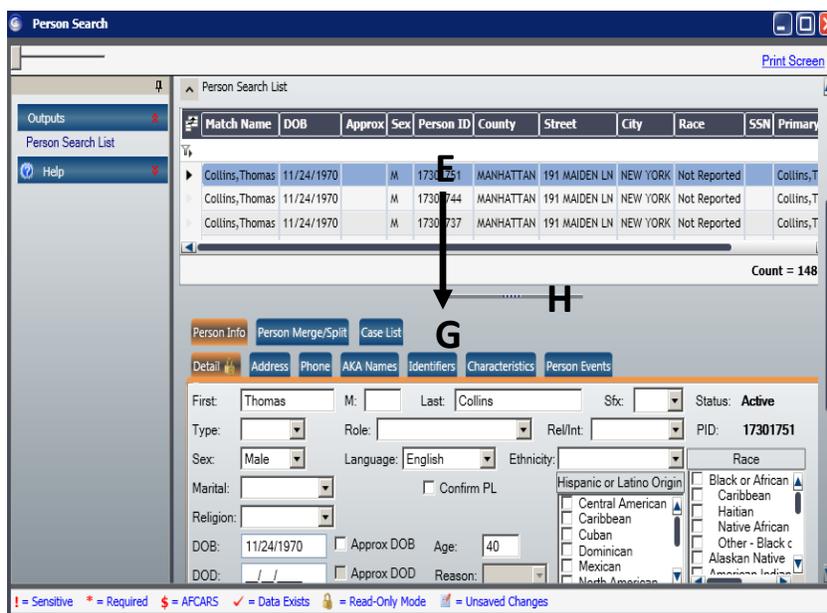
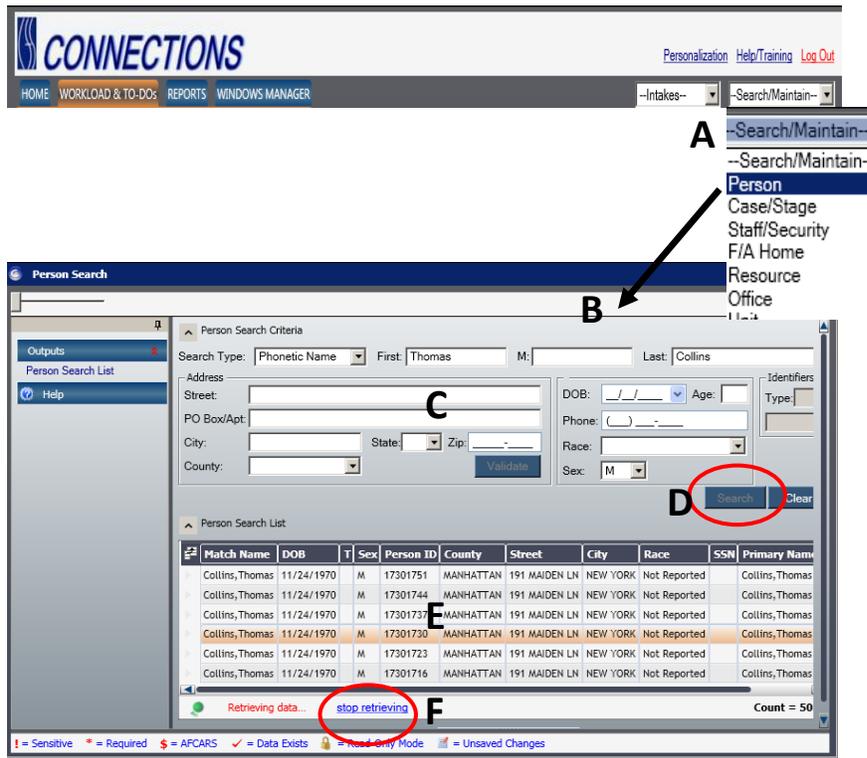
- The **Task Description** field will pre-fill with the selected task; otherwise you must complete this field manually.
- If the selected stage is an FSS, Progress Notes will be the only value in the **Task Type** drop-down.

Note: If a To-Do is created without highlighting a stage, it will be a Reminder To-Do.

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CONDUCT A SEARCH

- On the **Search/Maintain** drop-down on the toolbar (A), click on the desired search type, e.g., **Person**.
- The corresponding search window will open (B), e.g., *Person Search*. Only the search fields will initially display. (C)
- Click on the desired values in the search fields, as now and click the **Search** button. (D) The results list will display, e.g., **Person Search List**. (E)
- If the desired result is produced you may stop the search process by clicking the **Stop Retrieving** link (F) beneath the list.
- Select the desired result e.g., a person. (E) Tabs containing detail information will display. (G)
- Move the **Grid Separator** (H) up to see more of tab section (optional).
- You may navigate directly from one tab to the other.
- The other searches (Case, Staff, F/A Home, etc.) work essentially the same way.

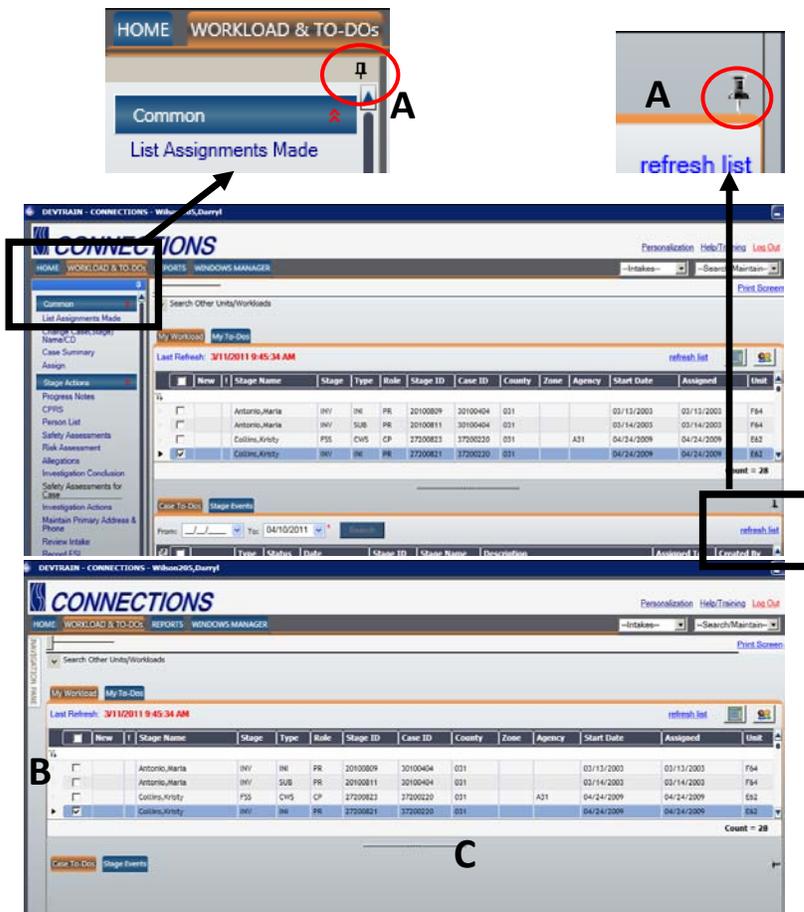


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CUSTOMIZING GRIDS

Unpin/Collapse

- Click the **Pin icon** in the top left of the **NAVIGATION PANE** and on some window sections to collapse (unpin) the **PANE** or section. **(A)**
- The remaining section stretches to fill the space. **(B)**
- To re-pin the **PANE**, hover over it until it re-displays and then re-click the **Pin icon**.
- To re-pin a section, click on the **Pin icon**.



Grid Separator

- Use the **Grid Separator (C)** to increase the size of a section you are viewing or working in.

Moving, Sorting and Filtering Grids

- Click on a column header to re-position the column to another location on the grid.
- Click on a column header and click on the arrow **(D)** to change the sort order of the column from ascending to descending, and vice versa.
- You may sort multiple columns by using your control key and clicking on the column headers.

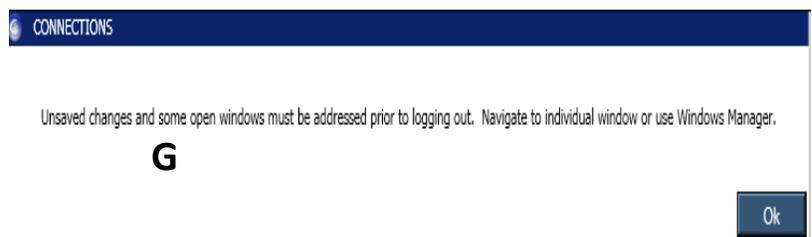
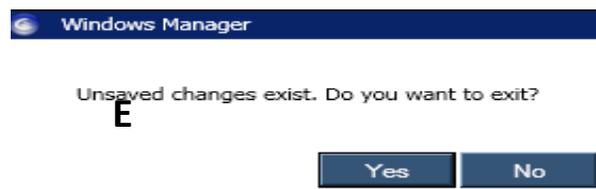
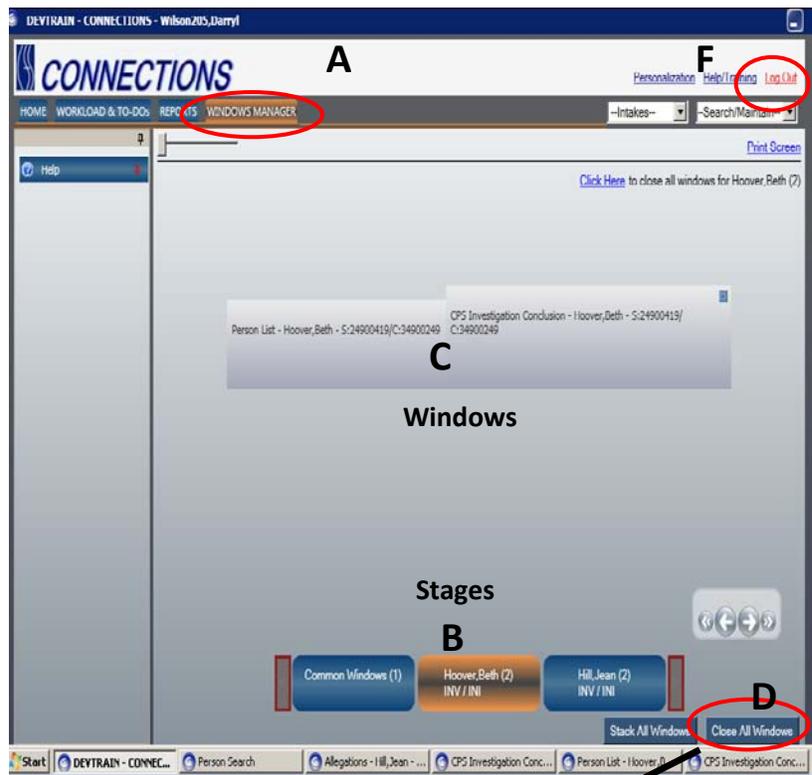


- Click in the row below the column header and type in one or more letters of a value you wish to use to filter the column. **(E)** (E.g., typing "C" will bring to the top all CWS stages in the **Type** column on your workload grid.)

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CLOSE ALL WINDOWS AND LOG OUT OF CONNECTIONS (WINDOWS MANAGER)

- In the transformed system you may have **multiple stages** and in some situations, **multiple windows within stages** open at a time.
- On the toolbar, click on the **WINDOWS MANAGER** tab. **(A)** Use the Windows Manager to keep track of the windows and stages you have opened. Click on a stage **(B)** and to display open windows in that stage **(C)**.
- Click on the **Close All Windows** button **(D)** to close any open windows simultaneously. This feature will not work with certain windows, such as those in the CPRS and FSS; these must be closed individually. Clicking on the **Yes** button on the message box **(E)** will bring you to the window to close it.
- Click on the **Log Out** link in upper right corner of the main window **(F)** to exit CONNECTIONS. If you get an “unsaved changes” message **(G)**, click on the **OK** button and navigate to the open window(s) to close them (or use the Windows Manager).



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For CPS Caseworkers

PERFORM AN INVESTIGATION TASK IN CONNECTIONS

Former Task List

Task List - Collins, Kristy
File Options Help

Stage: Investigation

- Review Intake
- Maintain Person
- Maintain Primary Address and Phone
- Maintain Allegation
- Investigation Actions
- Safety Assessment for Case
- Investigation Conclusion
- Child Protective Record Summary

Replaced by



Stage Actions links on the NAVIGATION PANE (INV stage)

Common

- List Assignments Made
- Change Case(Stage) Name/CD
- Case Summary
- Assign

Stage Actions

- Progress Notes
- CPRS
- Person List
- Safety Assessments
- Risk Assessment
- Allegations
- Investigation Conclusion
- Safety Assessments for Case
- Investigation Actions
- Maintain Primary Address & Phone
- Review Intake
- Record FSI

- On your workload, click on the row to select an INV stage.
- The **Stage Actions** section (A) in the **NAVIGATION PANE** will open and display links to task windows.
- Click on a link to access the corresponding task window. For example, click on the **Investigation Conclusion** link. The *Investigation Conclusion* window for the stage will open. (B)

Note: new Stage Actions terms:
CPRS = Child Protective Record Summary
Person List = Maintain Person
Allegations = Maintain Allegation

CPS Investigation Conclusion - Collins, Kristy - S:27200821/C:37200220

Case Name: Collins, Kristy Risk Rating:

Investigation Dates:

Intake Received: 04/24/2009 12:00 PM Investigation Begun:

Incident Occurred: Investigation Completed:

Determination:

Closure Reason: Duplicate Stage ID:

Fatality - No Surviving Children

Family Assessment Response

High Risk Comments:

Print Screen

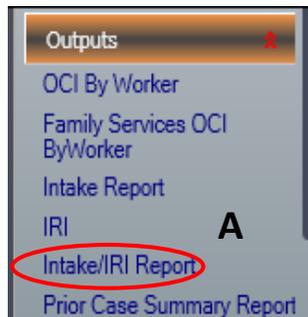
Save & Close Save Reset

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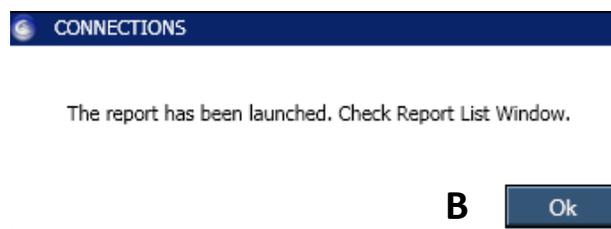
GENERATE AND ACCESS REPORTS

- On your workload, click on the row to select an INV stage.

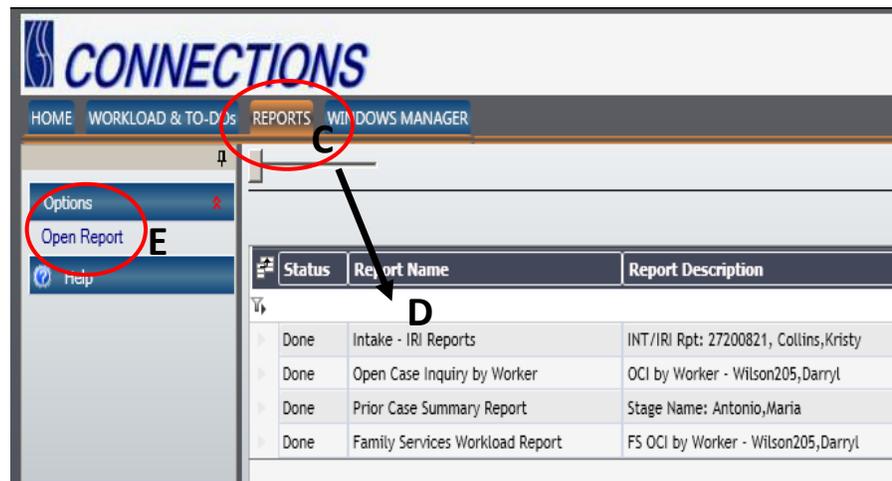
- The **Outputs** section in the **NAVIGATION PANE (A)** will open and display links to reports.



- Click on the desired output link, e.g., **Intake/IRI Report** and click on the **Ok** button in the resulting message box. **(B)**



- Click on the **REPORTS** tab **(C)** on the toolbar. The list of launched reports will display **(D)**.



- Click on the row of the desired report and click on the **Open Report** link **(E)** in the **NAVIGATION PANE**. The *ReportViewer* for the selected report will open.

Note: You will continue to access the SharePoint version of the Worker Open Caseload Inquiry Report (OCI) from the Citrix Desktop.

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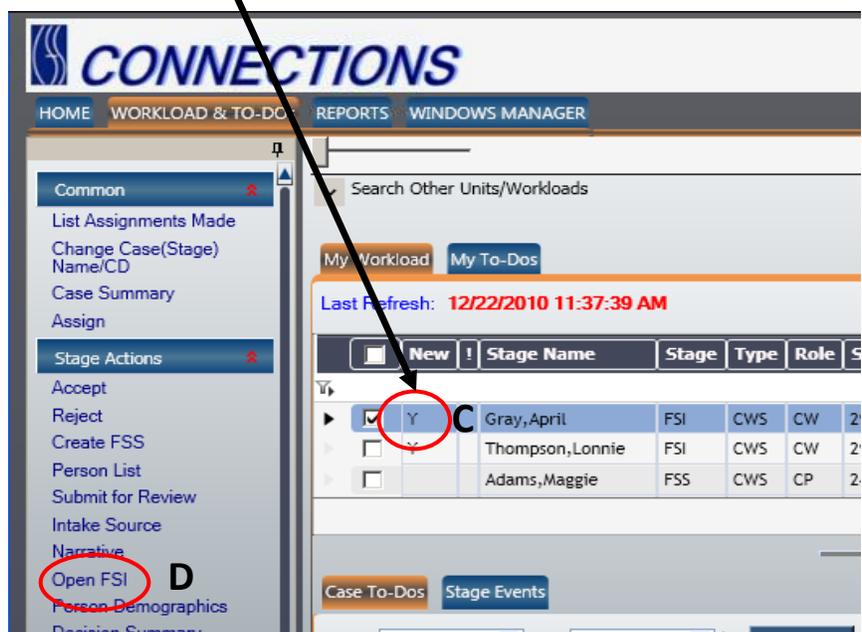
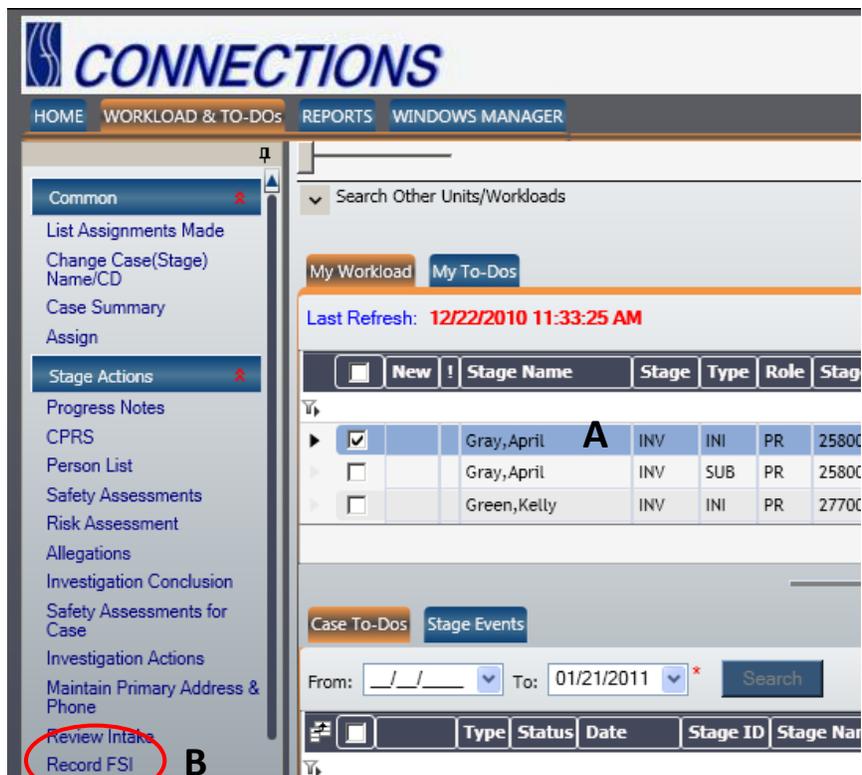
RECORD AN FSI FROM AN INVESTIGATION STAGE

Create the FSI

- On your workload, click on the row to select the desired INV stage. **(A)**
- Click on the **Record FSI** link **(B)** in the **NAVIGATION PANE**.
- A new FSI stage will appear on the top of your workload with the “Y” indicator. **(C)** No refresh needed.

Open the new FSI

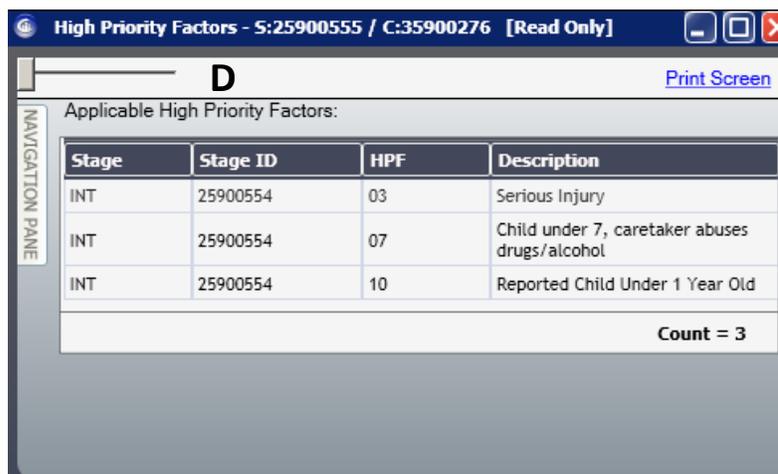
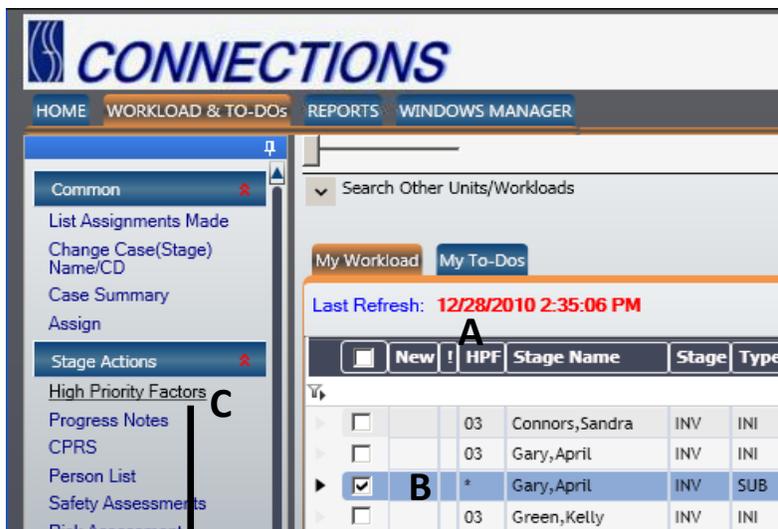
- Select the FSI **(C)** and click on the **Open FSI** link **(D)** in the **NAVIGATION PANE** or one of the links to the individual FSI tabs (e.g., **Intake Source**).
- The *Family Services Intake* window will open; complete as now.
- An FSS you create from the FSI will appear at the top of your workload, with the “Y” indicator after you refresh the workload.



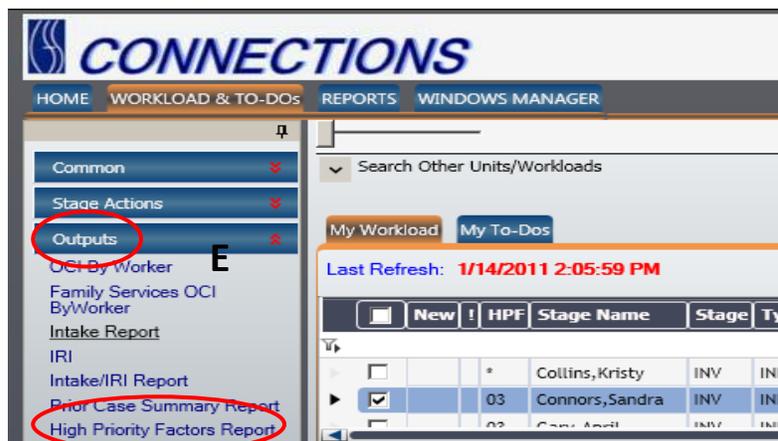
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IDENTIFY HIGH PRIORITY FACTORS (HPF) IN A STAGE (ACS staff only)

- The two present **HPF** columns on our workload are merged into one. **(A)**
- The **HPF** column will display the factor number if only one factor is identified (e.g., 3). It will display an asterisk (*) if more than one factor is identified. **(B)**
- Click on the **High Priority Factors** link **(C)** in the **NAVIGATION PANE** to open the new *High Priority Factors* window. **(D)**
- The window contains a description of the identified factor(s).



- The current **High Priority Factors Report** is still available as an output from the **NAVIGATION PANE** in the **Outputs** section **(E)**. (See the **CREATE AND ACCESS REPORTS** section on page 15 for how to launch and access this report.)

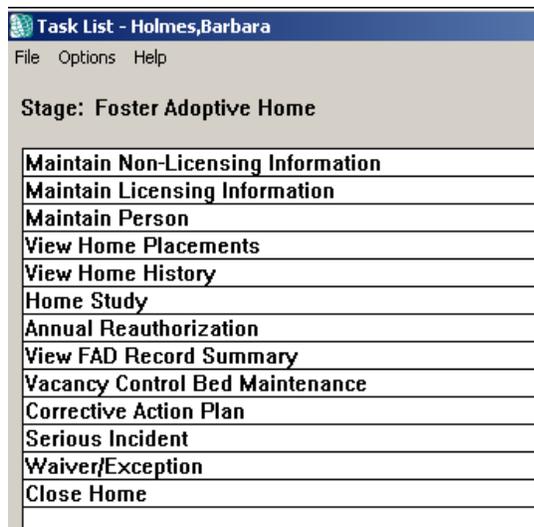


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For FAD Caseworkers

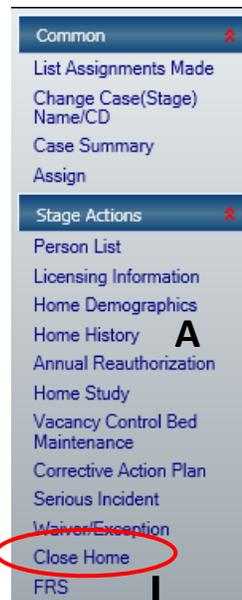
PERFORM A FAD TASK IN CONNECTIONS

Former Task List



Stage Actions links on the NAVIGATION PANE (FAD Stage)

Replaced by



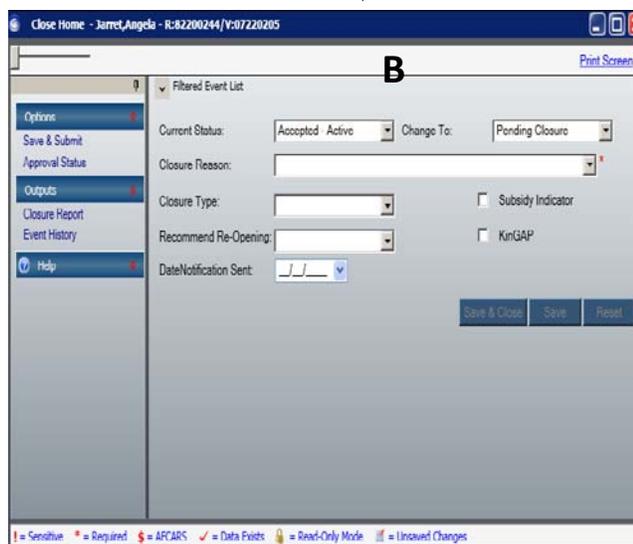
- On your workload, click on a row to select a FAD stage.
- The **Stage Actions** section (**A**) in the **NAVIGATION PANE** will open and display links to task windows.
- Click on a link to access the corresponding task window. For example, click on the **Close Home** link. The *Close Home* window for the stage will open. (**B**)

Note: new Stage Actions terms:

Person List = Maintain Person

Home Demographics = Maintain Non-Licensing Information

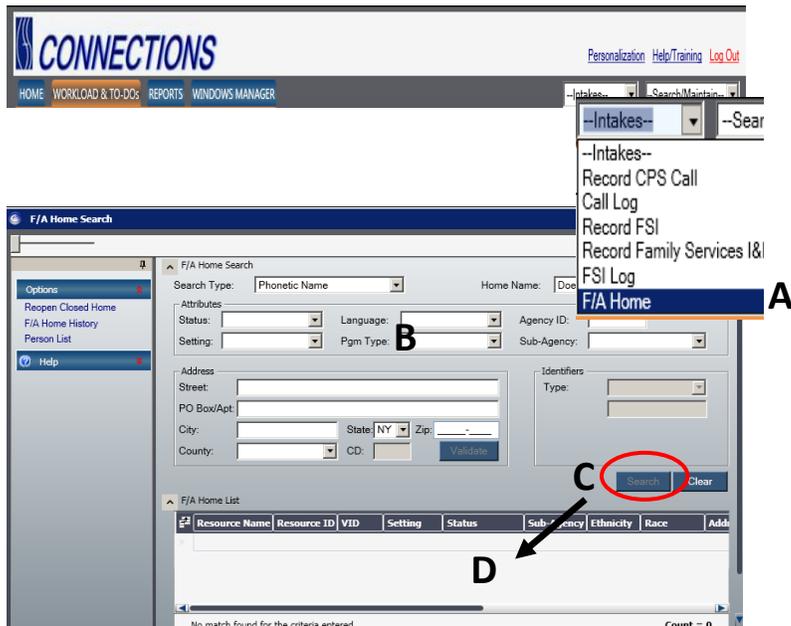
FRS = View FAD Record Summary



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INITIATE OPENING A FAD HOME

- On the **Intakes** or **Search/Maintain** drop-down, click on the **F/A Home** command. **(A)**
- The *F/A Home Search* window will open. Only the search fields will initially display. **(B)**
- Click on the desired values in the search fields and click on the **Search** button. **(C)**
- The **F/A Home List** will display underneath the search fields. **(D)**



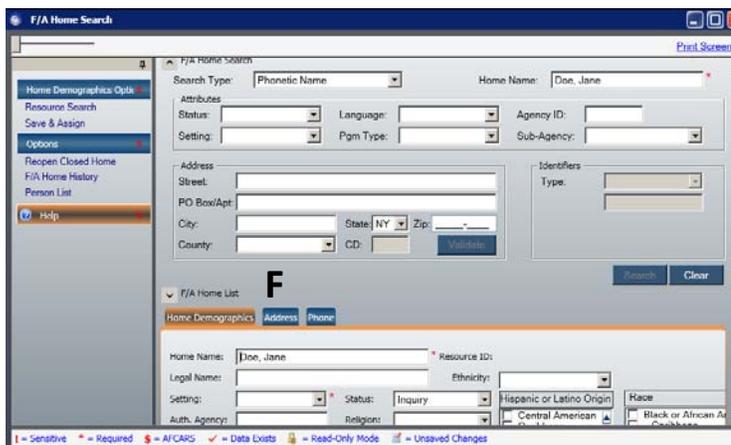
If no match found:

- Scroll down below the **F/A Home List** and click on the **New** button. **(E)**
- The **Home Demographics, Address** and **Phone** sub-tabs will display (replacing the list section). **(F)** The sub-tab fields will be blank, ready for data entry.

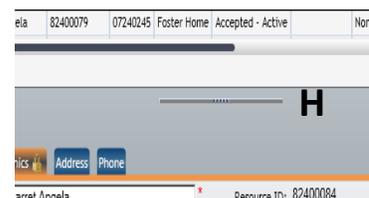


If a match found:

- On the **F/A Home List**, click on the row of the desired resource.
- The **Home Demographics, Address** and **Phone** sub-tabs will display beneath the home list. **(F)** The sub-tab fields will contain the data for the selected resource.



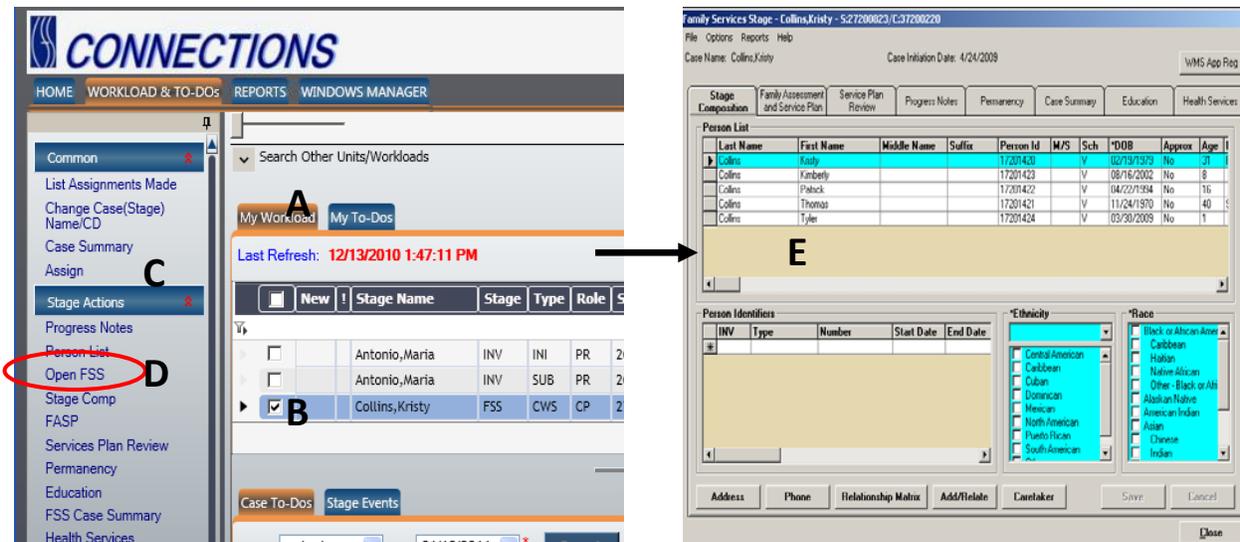
- To increase the sub-tab section work area, click on the up arrow next to the **F/A Home List** section title **(G)** to collapse the list section or move up the section separator. **(H)**



NYS Office of Children and Family Services CONNECTIONS

For Ongoing Child Welfare Services Caseworkers

NAVIGATE TO FSS WINDOWS



- On the **My Workload** sub-tab (A), click on the row of the desired FSS. (B) The **Stage Actions** section (C) in the **NAVIGATION PANE** will display links you will use to navigate to FSS tabs.
- Click on the **Open FSS** link. (D) The *Family Services Stage* window for the selected stage will display with the **Stage Composition** tab active. (E) Once you have entered the FSS for the stage, you may navigate to the other FSS tabs within that stage as needed.
- Instead of clicking on the **Open FSS** link, you may click on one of the other links in the **Stage Actions** section of the **NAVIGATION PANE** (e.g., **FASP**, **Education**, **Health Services**) to navigate directly to the corresponding tab within the selected FSS. Once you have entered the FSS for the stage, you may navigate to the other FSS tabs within that stage as needed. Exception: if you use the **Progress Notes** link to navigate directly to progress notes in an FSS, you will return to your workload when you close the *Progress Notes* window, as now.
- When you click on the **Close** button on the *Family Services Stage* window, you will return to your workload. If you have navigated to the FSS from another worker's workload via **Search Other Units/Workloads** (Unit Summary), you will return to that staff person's workload.

OPEN A FASP FOR A STAGE

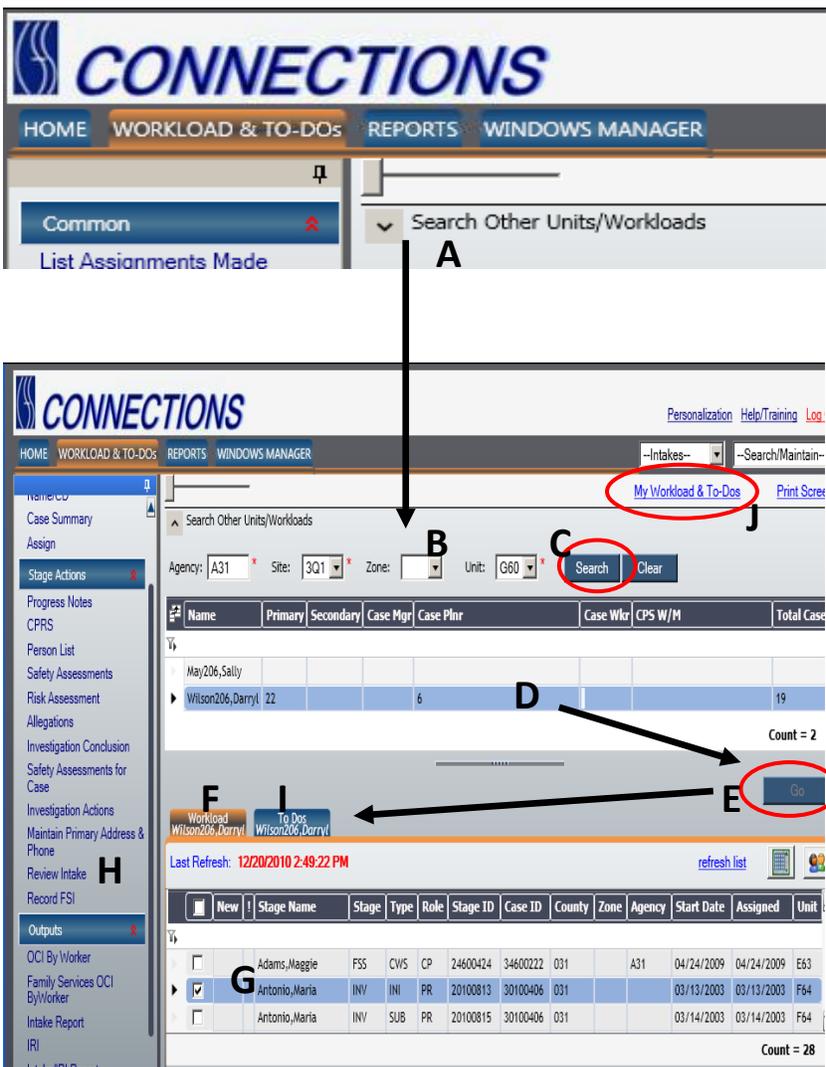
- Follow the process described above; click on the **FASP** link in the **NAVIGATION PANE**. The *Family Services Assessment and Service Plan* window will open for the selected stage. You may navigate to other FSS tabs within that stage as needed.

NYS Office of Children and Family Services CONNECTIONS

For Supervisors

ACCESS STAFF WORKLOADS, TO-DO LISTS

- Click on the down arrow next to **Search Other Units/Workloads** section header. **(A)** The section will expand and the search fields will display. **(B)**
- Click on the desired values in the search fields and click the **Search** button. **(C)** The list of staff matching the selected criteria will display **(D)**.
- Select a staff person in the grid **(D)** and click on the **Go** button. **(E)** The **Workload** and **To-Dos** sub-tabs for that person will display with the **Workload** sub-tab active. **(F)**
- On the **Workload** sub-tab, select the desired stage by clicking on the row. **(G)**
- Use the links in the **Stage Action** section in the **NAVIGATION PANE (H)** to access task windows for that stage.
- Click on the **To-Dos** sub-tab **(I)** to see that staff person's staff To-Dos.
- Return to your own workload by clicking on the **My Workload & To-Dos** link on the top right of the toolbar. **(J)**

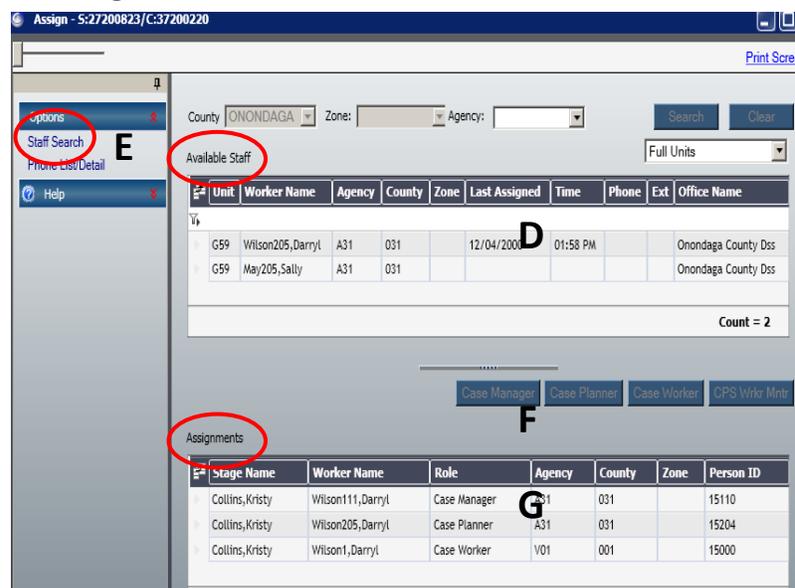
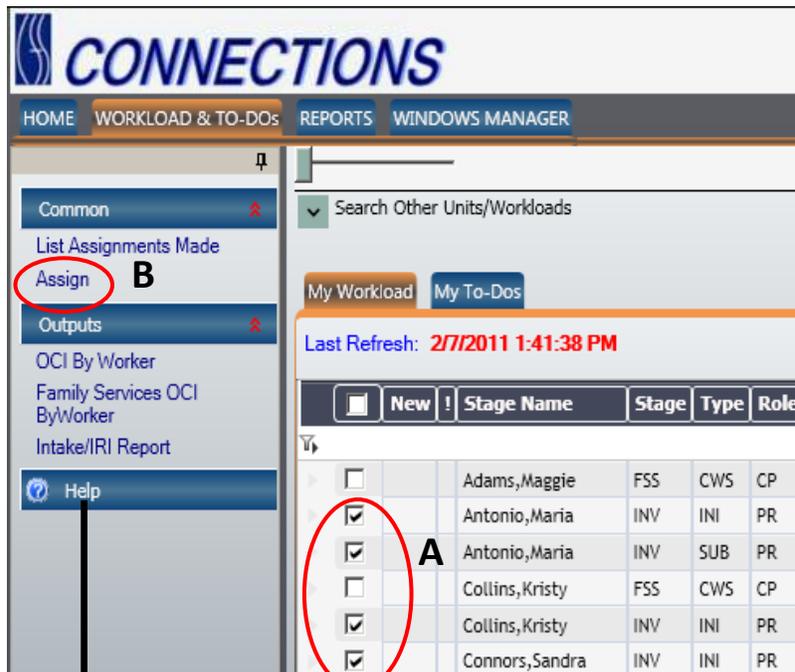


Note: you may only have one staff person's workload open at a time; you may have multiple windows open within that workload.

NYS Office of Children and Family Services CONNECTIONS

ASSIGN STAGES

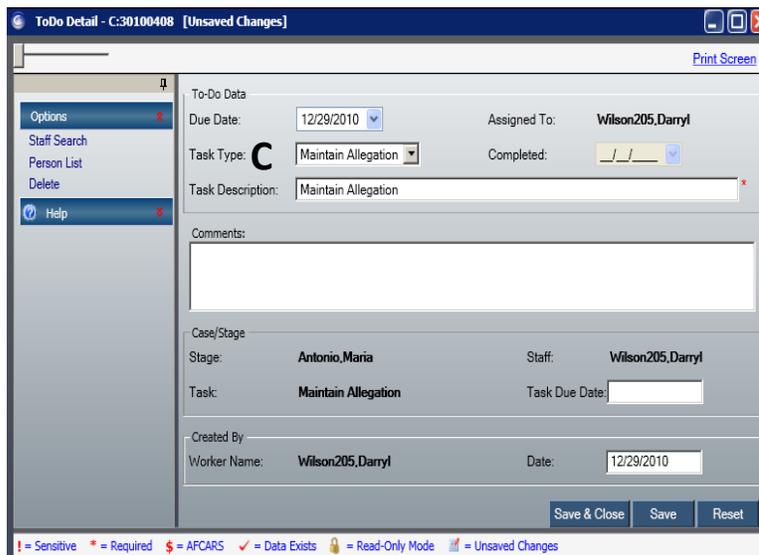
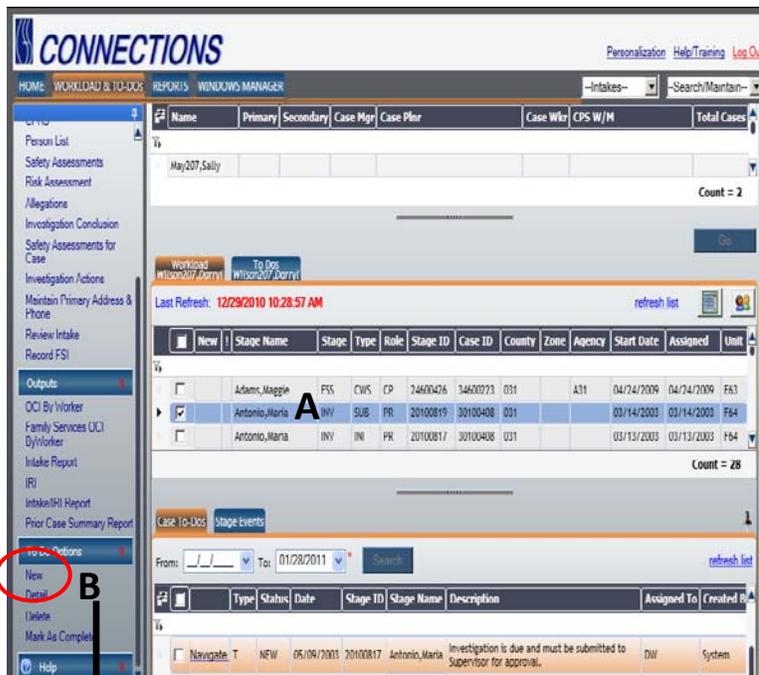
- From your workload (or a workload of one of your staff), click in the checkbox (and only the checkbox) for the stage(s) you wish to (re)assign. To select multiple stages, click in the checkboxes of each desired stage. **(A) Note:** You may only multi-assign to the same role. For Investigation stages, you may only multi-assign Primary roles
- Click the **Assign** Link in the **Common** section in the **NAVIGATION PANE**. **(B)** The *Assign* window will open. **(C)**
- On the *Assign* window, you may select a staff person in the **Available Staff** grid **(D)** or use the **Staff Search** link **(E)** in the **NAVIGATION PANE** to add a staff person to the grid.
- Click on the row of the staff person to receive the assignment and click on the button that corresponds to the role you wish to assign that person. **(F)** That staff person will be added to the **Assignments** grid. **(G)**
- Scroll down to the save buttons and save your work. (Save buttons not shown.) If you have saved and closed, you will return to the workload.



NYS Office of Children and Family Services CONNECTIONS

ASSIGN A TASK TO-DO

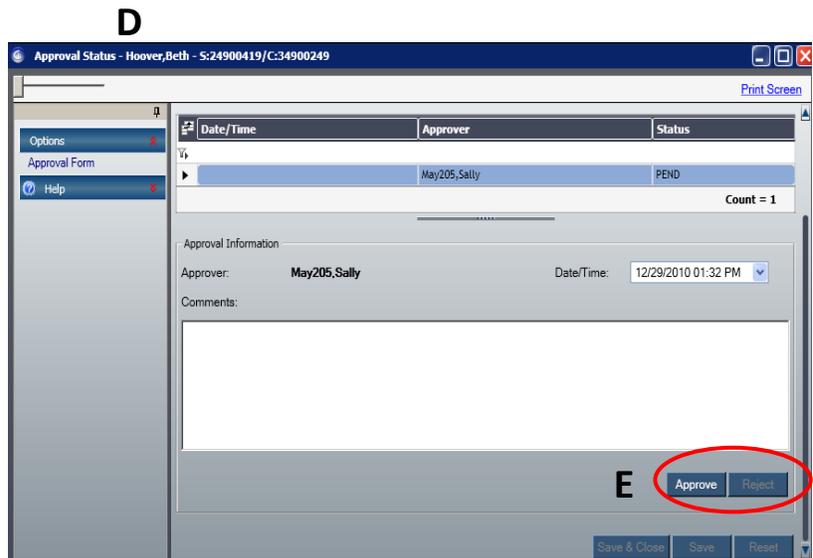
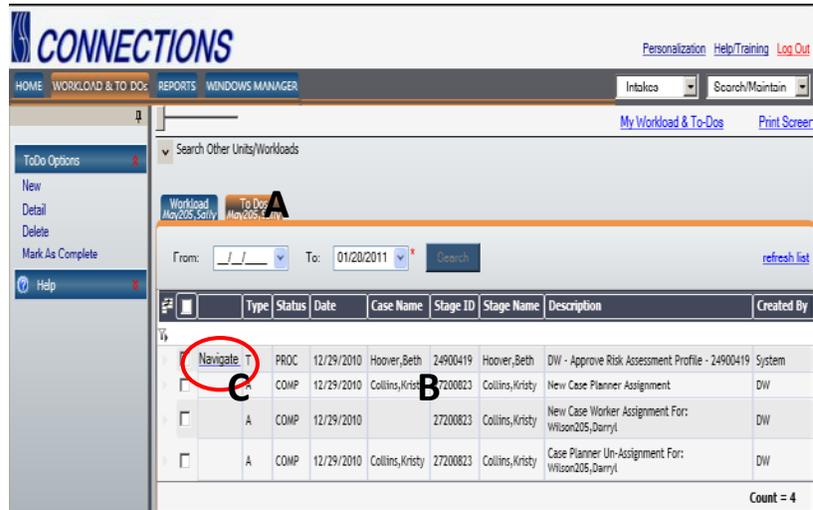
- From the workload of the staff person to receive the To-Do, click on the row of the desired stage. **(A)** (See **ACCESS STAFF WORKLOADS, TO-DO LISTS** section on page 21 for how to navigate to another's workload.)
- Click on the New link **(B)** in the **To-Do Options** section of the **NAVIGATION PANE**. The *To-Do Detail* window will open.
- In the **Task Type** field **(C)** select the appropriate Task (optional). The **Task Description** field will auto populate with the selected Task.
- If you have not entered a Task Type, you must manually fill in the **Task Description** field.
- Write comments as desired.
- Save your work. If you have saved and closed, you will return to the workload.



NYS Office of Children and Family Services CONNECTIONS

APPROVE A TASK

- On your workload, click on the **My To-Dos** tab. **(A)**
Your (staff) To-Dos will display under the tab. **(B)**
- Click on the **Navigate** link **(C)** for the action you wish to approve. The window associated with the task to be approved will display for your review.
- Close the task window. The *Approval Status* window will open. **(D)**
- Scroll down to view the **Approve** and **Reject** buttons **(E)** and approve/reject as appropriate.
- Save your work. If you have saved and closed, you will return to the workload.



NYS Office of Children and Family Services CONNECTIONS

For Managers

NAVIGATE TO CASES/STAGES

- On the toolbar, click on the **Case/Stage** command in the **Search/Maintain** drop-down. **(A)**
The *Case/Stage Search* window will open. **(B)** Only the **Case Search Criteria** section will display. **(C)**

- In the **Case Search Criteria** section, enter search criteria and click on the **Search** button. **(D)**
The cases matching the entered search criteria will display in the **Case List**. **(E)**

- On the **Case List**, select the desired case. Tabs for **Comp**, **Case To-Dos**, **Case Events** and **Case Summary** will display. **(F)**

- Click on the **Case Events** tab. **(F)**
The events associated with the case will display. **(G)**

- To filter events, use the filter feature by clicking in the filter row for the desired column. **(H)**
You may also use the date filter. **(I)**

- Select an event (e.g., Family Services Stage opened) to navigate to the stage, as now.

The screenshot shows the CONNECTIONS Case/Stage Search interface. At the top, there is a navigation bar with 'HOME', 'WORKLOAD & TO-DOS', 'REPORTS', and 'WINDOWS MANAGER'. A dropdown menu is open, showing options like 'Person', 'Case/Stage', 'Staff/Security', and 'F/A Home'. The 'Case/Stage' option is selected. Below this, the 'Case/Stage Search' window is displayed. It has a 'Case Search Criteria' section with fields for Case ID, Stage ID, Case Name Search (First, Last, MI), Facility Case Name Search, Name, District, Zone, and WMS Case #. A 'Search' button is circled in red. Below the search criteria is a 'Case List' table with columns: Image, Merge, Status, Case Name, Case ID, Dist/Agy, Zone, Case Type, Worker, and Work Phone. The table contains several rows of case data. Below the Case List, there are tabs for 'Comp', 'Case To-Dos', 'Case Events', and 'Case Summary'. The 'Case Events' tab is selected. Below the tabs, there is a date range filter (From: __/__/__, To: __/__/__) and a 'Search' button. Below this is an 'Event List' table with columns: Event Date, TX Date, Status, Type, Description, and Stage. The table contains several rows of event data. A filter row is visible at the top of the event list, with a dropdown arrow circled in red.

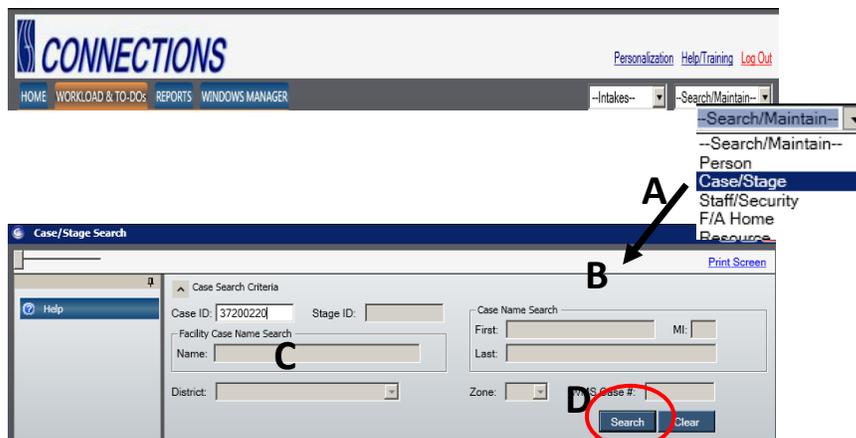
See the **ACCESS STAFF WORKLOADS, TO-DO LISTS** section (p 21) to learn how to access staff's workloads via **Search Other Units/Workloads** (Unit Summary access).

NYS Office of Children and Family Services CONNECTIONS

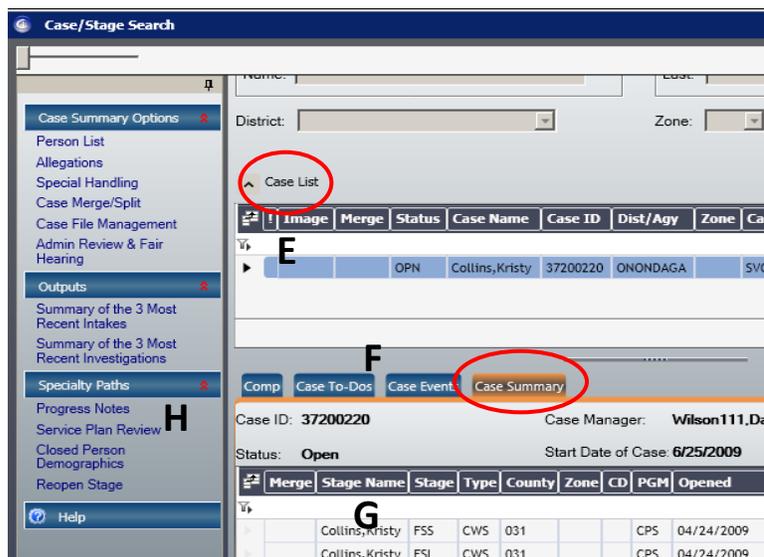
For Support Staff and Specialists

NAVIGATE TO CASES/STAGES

- On the toolbar, click on the **Case/Stage** command in the **Search/Maintain** drop-down. **(A)** The *Case/Stage Search* window will open. **(B)** Only the **Case Search Criteria** section will display. **(C)**

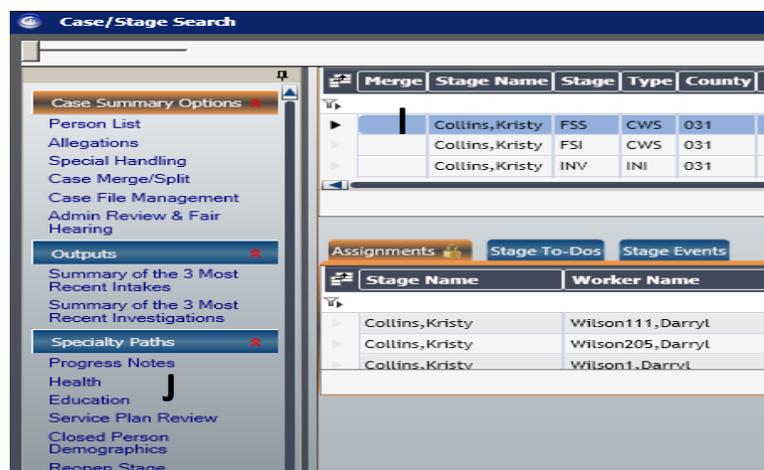


- Enter search criteria and click on the **Search** button. **(D)** The case(s) matching the entered search criteria will display in the **Case List**. **(E)**



- On the **Case List**, select the desired case. Tabs for **Comp**, **Case To-Dos**, **Case Events** and **Case Summary** will display. **(F)**

- Click on the **Case Summary** tab. The stages associated with the case will display. **(G)** **Note:** The Progress Notes and Service Plan Review links will display in the **NAVIGATION PANE**, but will not be active (enabled). **(H)**



- Click on the desired stage. **(I)** Depending on the stage selected and your security, links will display in the **Specialty Paths** section **(J)** of the **NAVIGATION PANE**.

- Click on the desired link. The corresponding tab/window for the selected stage will display.

For LAN Administrators & Security Coordinators

NAVIGATE TO TASK WINDOWS

- On the toolbar, open the **Search/Maintain** drop-down.
(A) Note: only those functions for which you have maintain security will appear on the drop-down.
- Select the desired function you wish to maintain, e.g., **Unit**. **(B)** The corresponding window will open. **(C)** Initially, only the search section of the window will display.
- Enter search criteria and click on the **Search** button **(D)** to access details about the selected function.
- The links and commands on the **NAVIGATION PANE (E)** replace the menus and buttons on the existing windows.

