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CONNECTIONS

System Build 15.1

FAD:

Local Data Maintenance (LDM)



CONNECTIONS Training Project
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CONNECTIONS
System Build 15.1
FAD

Local Data Maintenance Job Aid

Contents

Contents.....	2
Introduction	4
Local Data Maintenance (LDM) Window.....	4
I – Accessing the LDM Window	4
II – The Layout of the LDM Window	6
1 – The Heading.....	6
2 – The Footer.....	7
3 - The Tabs	8
3a - Overview.....	8
3b – Person Demographics Tab	9
3c – Other LDM Tabs.....	14
III - LDM On Line Help	14

This job aid is available online:

- The Public Folders:
 - All Public Folders > Statewide > Connections > Build 15.1
- The CONNECTIONS Intranet site:
 - DFA Intranet Site > OCFS Homepage > Connections > Desk and Job Aids

The CONNECTIONS Intranet site also contains information about CONNECTIONS training.

Note: New Phone Number for the Help Desk

The NYS OFT Enterprise Help Desk staff are available to answer basic questions related to your equipment, or problems you're having with the CONNECTIONS application. If they cannot solve your problem, they will record your information and forward it to others who can.

When you call the Help Desk with a problem, you will be given a ticket number to use for tracking your issue and its resolution. Keep a record of this number; you will need it for any follow-up conversations with the Help Desk.

The Help Desk is staffed 24 hours a day, seven days a week. The new telephone number is:

1-800-697-1323

Note: Any visible identifying data in examples in this job aid is simulated.

Introduction

This Job Aid provides information on a new *Local Data Maintenance* window being introduced in Build 15.1.

Note: The use of the *Local Data Maintenance* window requires a newly created security attribute. This security attribute determines your access to certain functions and windows. Contact your security coordinator if you have questions regarding security access.

Local Data Maintenance (LDM) Window

There are situations in which demographic information for a closed FAD stage needs to be corrected.

In the past, it was not possible to change information in a closed FAD stage.

The *Local Data Maintenance* (LDM) window allows the viewing and updating of Person Demographic information in closed FAD stages.

The LDM window contains 4 tabs: **Person Demographics**, **Add / Relate Person**, **Allegations**, and **Investigation Conclusions**, but only one - **Person Demographics** – is available to FAD workers.

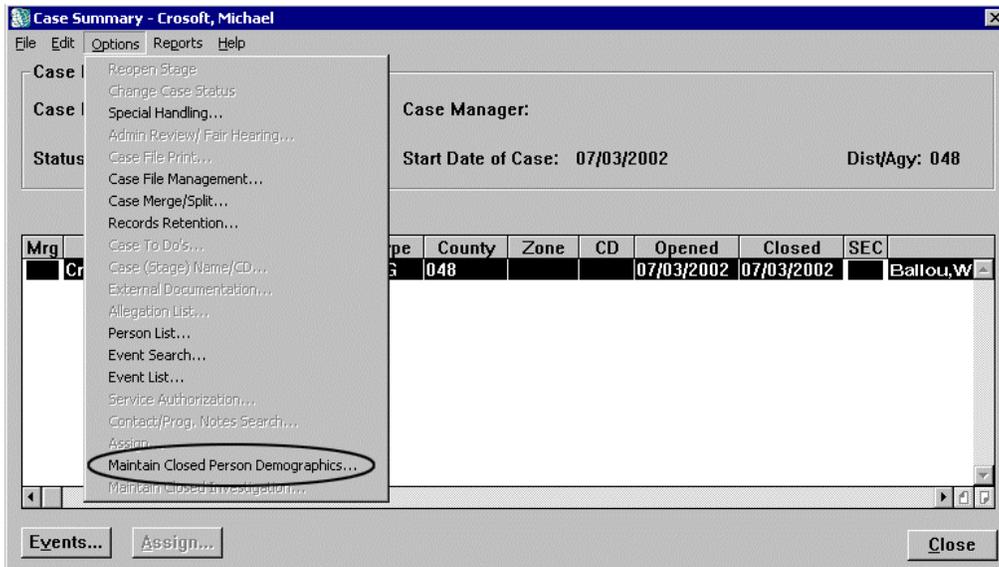
Access to the *Local Data Maintenance* window requires the **Maintain Closed Person Demographics** security attribute. The actions permitted by this security attribute and the methods of accessing the LDM window are discussed below.

I – Accessing the LDM Window

FAD workers can access the LDM window through the *Case Summary* window.

Since the stage in question will be closed, it will not appear on the **Assigned Workload**. Therefore, it is necessary to perform a case search. Selecting the case from the resulting Case List and clicking the **Summary** button opens the *Case Summary* window.

On the *Case Summary* window, select the FAD stage to be viewed/updated and click the *Options* drop down menu.



Two new items have been added to the **Options** menu of the *Case Summary* window:

- Maintain Closed Person Demographics
- Maintain Closed Investigation

FAD workers can view and update Person Demographic information in closed FAD stages by selecting the **Maintain Closed Person Demographics** menu option. Maintain Closed Investigation is not available to FAD workers.

Access requirements for the LDM window are summarized below:

Menu Item on <i>Case Summary</i> Window	Maintain Closed Person Demographics
Security Attribute Needed	Maintain Closed Person Demographics
Additional Access Requirements	<ul style="list-style-type: none"> • FAD stage is closed and • Worker must be from same district/agency as primary worker when stage was closed
LDM Tabs Enabled	Person Demographics

Selecting **Maintain Closed Person Demographics** opens the LDM window in modify mode.

Although the LDM window includes 4 tabs (sections), only the **Person Demographics** tab will be active when the window is accessed via the **Maintain Closed Person Demographics** menu item.

Note: No events are generated if the LDM window is accessed through the Maintain Closed Person Demographics menu item.

II – The Layout of the LDM Window

For the purposes of this explanation, think of the LDM window as being organized into three sections. The Heading and Footer sections contain elements that are present no matter which section of the LDM window is being used. The Tabs are the sections that make up the main body of the LDM window and are described in detail below.

Local Data Maintenance - Crosoft, Michael - S:21857621/C:20942718

File Options Help

Heading

Case Name: Crosoft, Michael Stage ID: 21857621 Case Status: CLD
Case ID: 20942718 Report Date: Event Status:

Person Demographics Add/Relate Person Allegations Investigation Conclusions

Last Name	First Name	Middle Name	Person ID	D.O.B.	T	Age	Marital Status	Sex	Ethnicity	Race
Crosoft	Michael	S	24462558	02/13/1958		44	Married	Male	Non-Hispanic or Lat	Black or African Ar
Crosoft	Michelle	S	24462561	08/27/1959		42	Married	Female	Non-Hispanic or Lat	Black or African Ar
Crosoft	Miles	S	24462562	11/11/1983		18	Single, never MA	Male	Non-Hispanic or Lat	Black or African Ar

Tabs

Inv	Type	Number	Start Date	Enr
No	SSN	111-11-1111	07/03/2002	

Ethnicity: Non-Hispanic or Latino
 Central American
 Caribbean
 Cuban
 Dominican
 Mexican
 North American
 Puerto Rican
 South American

Race:
 Black or African American
 Caribbean
 Haitian
 Native African
 Other - Black or African American
 Alaskan Native
 American Indian
 Asian
 Chinese
 Indian

Address/Phone Save Cancel

Footer Close

1 – The Heading

The heading is always present when the LDM window is open. It includes the following information: Case Name, Case ID, Stage ID, Report Date, Case Status, and Event Status.

Note: When the LDM window is entered via the **Maintain Closed Person Demographics** menu item on the *Case Summary* window, the Event Status field will be blank.

2 – The Footer

The footer is always present when the LDM window is open. Only one button appears in the footer:

Close: Clicking on this button closes the LDM window and returns you to the *Case Summary* window. The Close process also gives you the opportunity to save any unsaved changes to the LDM window.

To close the LDM window:

1. Click the **Close** button on the LDM window.
2. The following message displays (if you have made changes to the LDM window):

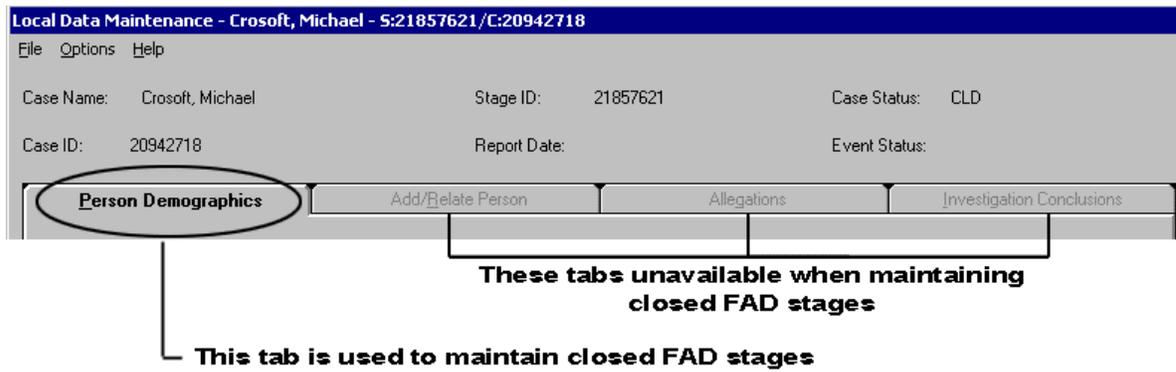
“Save changes in progress?”

- Clicking **Yes** saves all changes to the CONNECTIONS database before continuing.
- Clicking **No** discards any unsaved changes.

Note: You must save (click on the **Save** button) after each change you make to the **Person Demographics** tab in order for that change to be stored in the CONNECTIONS database. Therefore, if more than one change has been made, only the last one, if unsaved, will be discarded when **No** is clicked.

3 - The Tabs

3a - Overview



The information contained in the LDM window is organized into sections, which are represented by file tabs on the LDM window. Appearing from left to right, these tabs are labeled:

- Person Demographics
- Add / Relate Person
- Allegations
- Investigation Conclusions

Only the **Person Demographics** tab is available when the LDM window is entered using the **Maintain Closed Person Demographics** menu item.

Information entered in the LDM window will be stored in the CONNECTIONS database. When you reenter the LDM window, it will be “refreshed” with the most current information from the CONNECTIONS database. This information can be reviewed and, if necessary, updated further.

3b – Person Demographics Tab

Local Data Maintenance - Crosoft, Michael - S:21857621/C:20942718

File Options Help

Case Name: Crosoft, Michael Stage ID: 21857621 Case Status: CLD

Case ID: 20942718 Report Date: Event Status:

Person Demographics Add/Relate Person Allegations Investigation Conclusions

	Last Name	First Name	Middle Name	Person ID	D.O.B.	T	Age	Marital Status	Sex	Ethnicity	Race
▶	Crosoft	Michael	S	24462558	02/13/1958		44	Married	Male	Non-Hispanic or Lat	Black or African Ar
	Crosoft	Michelle	S	24462561	08/27/1959		42	Married	Female	Non-Hispanic or Lat	Black or African Ar
	Crosoft	Miles	S	24462562	11/11/1983		18	Single, never MA	Male	Non-Hispanic or Lat	Black or African Ar

Inv	Type	Number	Start Date	En
▶ No	SSN	111-11-1111	07/03/2002	
*				

Ethnicity: Non-Hispanic or Latino

Race: Black or African American

Caribbean

Haitian

Native African

Other - Black or African American

Alaskan Native

American Indian

Asian

Chinese

Indian

Address/Phone Save Cancel Close

The **Person Demographics** tab allows workers to view and update information about persons associated with a closed FAD stage.

Notes:

- A person's information on this tab cannot be modified if that person is associated with any open, non-ARI stage.

Attempting to modify information for a person in an open non-ARI stage results in the following message:

“Can't modify demographic information of people in open stages. Person member of Stage ID: ###”

- Correcting demographic information for a person who is associated with an open stage can only be done in the *Person Detail* window, not through the LDM window. Conduct a person search to determine if the person in question is associated with any open stages and contact the primary worker associated with the open stage to discuss any changes.

The **Person Demographics** tab will be the active tab whenever the LDM window is opened using the **Maintain Closed Person Demographics** menu item. It contains 2 grids.

Upper Grid

The upper grid contains the following information about all persons associated with a closed FAD stage: Primary Name, Person ID, Date of Birth, T (Date of Birth Type), Age, Marital Status, Sex, Ethnicity, Race, Language, Religion, Date of Death, Approximate Date of Death Flag, Phone Number, Extension, Phone Type, Relation/Interest, and Role.

- The Date of Death and Approximate Date of Death Flag columns can only be modified if a Date of Death already appears in the grid for that person.
- Updating a person’s Date of Birth in LDM will change the person’s Date of Birth in all other stages containing that person. (Keep in mind that, since a person in open stages cannot be modified, the affected stages will all be closed stages.)

Note: The Age field cannot be modified if there is an exact Date of Birth listed in the DOB field. If corrected DOB information for an exact DOB becomes available, correct the DOB field and the Age field will automatically update. If the DOB is marked Approximate (A) or Estimated (E), the Age column can be modified. When Age is modified, the DOB is recalculated and updated. If new exact Date of Birth information is entered, be sure to also change the Date of Birth Type in the T column.

All columns in this grid are modifiable by clicking directly on the grid cell and typing with the following exceptions:

Column	Modified by...
Person ID	Cannot be modified
Race	Race selection box elsewhere on Person Demographics tab
Ethnicity	Ethnicity drop down and selection box elsewhere on Person Demographics tab
Phone, Extn, Type	<i>Maintain Primary Address/Phone</i> window. Accessed via Address/Phone button elsewhere on Person Demographics tab
Role	Automatic (re)calculation when changes to Allegations tab are saved

Hint: Before changing a Person's name on the **Person Demographics** tab, it's a good idea to do a Person Search to see if the new name is known to the system. If the name is known, do a relate on the **Add/Relate Person** tab rather than change the name on the **Person Demographics** tab.

You can navigate to the LDM from the *Person Search* window as follows:

1. Select the person from the Person Search List by clicking on that row of the list.
2. Click the **Case List** button on the *Person Search* window.
3. Select the appropriate case in the *Case List* window.
4. Click the **Summary** button on the *Case List* window.

The LDM window can be accessed from the Case Summary window as described on page 4.

Clicking in a row of the grid selects that person for modification. An arrow to the left of a row indicates that the information in the lower grid applies to that person.

Lower Grid

When a person is selected in the upper grid, the lower grid will display all person identifiers (SSN, CIN, etc.) for that person. Each identifier appears in its own row of the lower grid. An arrow to the left of the row indicates that identifier is currently selected for editing. New identifiers can be added by typing into the bottom-most row of the lower grid, which is marked with a star. Adding a new row with the same Type as an existing row (that does not have an end-date) will set the End Date of that existing row to the current date.

The lower grid displays the following information for each identifier: ID Invalid Flag, ID Type, ID Number, Start Date, End Date, and Comments.

The information in this grid is modifiable as follows:

Column	Modified by...
ID Invalid Flag	Can only be marked (using the drop down arrow that appears when clicking in the cell,) not removed. Marking the flag invalid will set the end date of that row to the current date.
<i>Continued on next page</i>	

Column	Modified by...
ID Type	Can be selected for new rows using the drop down arrow that appears when clicking in the cell. ID Type cannot be modified for existing rows.
ID Number	Can be modified by clicking and typing directly in the grid. Cannot be modified in a row for which the End Date is set.
Start Date	Set to the current date when a new ID type is added.
End Date	Is set to current date when ID Invalid Flag is set or when new row with same ID type is added.
Comment	Can be modified by clicking and typing directly in the grid.

The Race and Ethnicity of the person selected in the upper grid can be modified using the drop-down box and list boxes in the bottom right-hand corner of the tab.

Box	Enabled when...	Modifying this box...
Ethnicity Drop Down	A person is selected in the upper grid	Updates the Ethnicity column in the upper grid Note: Will display "NR" when the ethnicity is listed as "Not Reported" in the upper grid.
Ethnicity List Box	A person is selected in the upper grid and Ethnicity Drop Down is set to "Hispanic or Latino"	NA
Race List Box	A person is selected in the upper grid	Updates the Race column in the upper grid If more than one Race selected in this box, upper grid displays "Multiple"

Remember: You must save (click on the **Save** button) after each change you make to the **Person Demographics** tab in order for that change to be stored in the CONNECTIONS database.

Buttons on the Person Demographics Tab

Address/Phone: This button accesses the *Maintain Primary Address and Phone* window for the closed FAD stage, allowing the worker to modify Primary Address and/or Primary Phone information for all persons associated with the stage. Clicking on this button with unsaved changes pending on the LDM window displays the following message:

“Please save or cancel changes before maintaining address information”

- Clicking **OK** will return you to the **Person Demographics** tab. Clicking the **Save** or **Cancel** button on the **Person Demographics** tab will allow you to open the *Maintain Primary Address and Phone* window with changes having been saved or discarded depending on which was clicked.
- Trying to open the *Maintain Primary Address and Phone* window when every person in the case is also in an open non-ARI stage, will result in the following message appearing:

“Cannot maintain address/phone information:
Everyone in this closed case is also in another open non-ARI stage”

The *Maintain Primary Address and Phone* window will not open.

- For more information on the *Maintain Primary Address and Phone* window, see the Build 15 CPS Job Aid.

Save: Clicking this button saves changes made on the tab. It is disabled until any changes are made on the **Person Demographics** tab and becomes disabled after a save until the next time changes are made to the tab.

Cancel: Clicking this button cancels all changes made to the tab since the last save. It is disabled until any changes are made on the **Person Demographics** tab. Clicking the button displays the following message:

“Your changes will be lost. Continue?”

- Clicking **Yes** will discard any unsaved changes. Clicking **No** leaves the changes as they were entered.

Notes:

- A person’s information on this tab cannot be modified if that person is associated with any open, non-ARI stage.

Attempting to modify information for a person in an open non-ARI stage results in the following message:

“Can’t modify demographic information of people in open stages. Person member of Stage ID: ###”

Contact the primary worker associated with the open stage to discuss any changes.

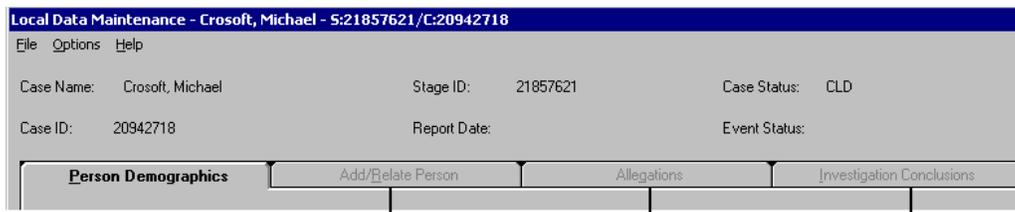
Whether a person’s information can be modified will change as stages containing that person are opened and closed.

- Clicking the **Close** button when there are unsaved changes on this tab will display the following message:

“Save changes in progress?”

Clicking **Yes** saves the changes before closing the window.
Clicking **No** discards them.

3c – Other LDM Tabs



These tabs unavailable when LDM is entered through " Maintain Closed Person Demographics"

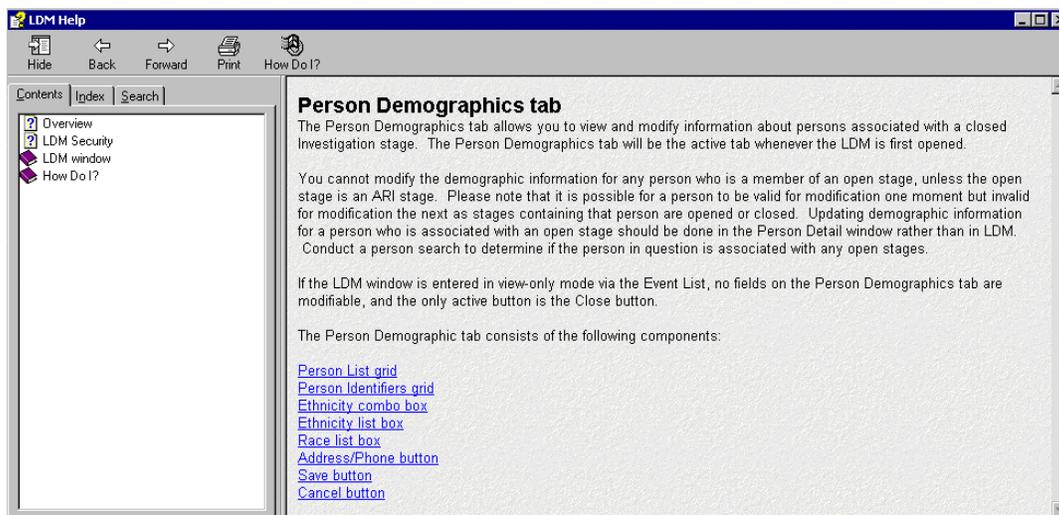
The remaining tabs on the LDM window - Add/Relate Person, Allegations, and Investigation Conclusions – are not accessible when the LDM window has been entered using the **Maintain Closed Person Demographics** menu item in the *Case Summary* window.

III - LDM On Line Help

Context sensitive help information is available for all elements of the LDM window including tabs, grids, buttons, and individual fields. Click on an element to make that element “active” and press the **F1** key on your keyboard. Information about that element of the LDM window will be displayed.

LDM On Line Help includes the following features:

- A Table of Contents allowing access to all Help information.
- Index and Search functions providing alternate means of finding information.
- Interactive graphic examples of LDM window elements. Clicking on certain portions of a graphic within LDM On Line Help will display explanations of that element. (Available at a later date.)
- Hyperlinks appear throughout the Help information. These links will take you directly to related information such as definitions and procedural guidelines.



Pressing **F1** opens the LDM Help system. Information specific to the LDM window element that was active when **F1** was pressed will be displayed. Once in the Help system, the table of Contents allows access to help information on other elements of the LDM window.

Besides context sensitive help information on LDM window elements such as fields, tabs, and buttons, the LDM Help system includes the following:

- **LDM Overview:** A high level summary of LDM including a listing of its features and functions. This overview can be accessed directly by clicking the word *Help* that appears in the upper left corner of the LDM window and then clicking on *LDM Help*, which appears in the small drop-down menu.



- **“How Do I?” Help:** Information on how to navigate within the LDM window and how to best utilize its functions.
- **Glossary:** Definitions of terms commonly used in casework as well as definitions of LDM window elements and concepts. (Available at a later date.)
- **Guidelines:** Background on the legal, policy, and procedural guidelines followed by workers as they develop and record the information viewed in the LDM window. (Available at a later date.)
- **Help on Help:** Instructions on how to use the LDM On Line Help system. (Available at a later date.)

Key elements of the information in this job aid relating to features and functionality of the LDM window can also be found in the LDM On Line Help.