

# MEMO

**Date:** October 1, 2001

**To:** Directors of Services and Implementation Coordinators

**From:** Zack Zambri, Project Director

**Re:** CONNECTIONS Project Update

---

The CONNECTIONS Project has continued to reach a number of significant milestones. The following topics highlight their development:

- New Development
- Steering and Management Committee
- Data Warehouse Information
- Technical Upgrade and Equipment
- Changes to Current Functionality
- Training, Communications and Implementation Support

These narratives highlight a detailed summary of the aforementioned project topics.

## **New Development**

Planning activities for the new development Phases of CONNECTIONS are well underway. Federal approval of the APDU, dealing with the new development was received and we are currently waiting for the State appropriation. Scope documents, illustrating which functions of the new development would fall into which Phase, were created and presented at the Management and Steering Committee meeting held in July. Detailed work plans for each Phase of the development effort have been drafted. Members of the OCFS Project Team and Maximus, Inc. are developing Requirements Documents that capture and define all required information about each piece of system functionality. These Requirement Documents will be reviewed by the Case Management and Financial Management Workgroups in the fall.

In preparation for the new development, project staff have also conducted an in depth review of the federal and NYS SACWIS requirements. A similar review of the AFCARS and NCANDS data collection requirements has also been undertaken. The workflows, created during the workgroups conducted in the fall of 2000 have continued to evolve. Modifications have recently been made to add required supervisory approvals and an index of all known and anticipated outputs. Updated workflows are currently being reviewed by OCFS Legal and Policy. Project staff are participating in several cross training sessions in an effort to increase understanding of functional areas and responsibilities. For example, a graphical user interface session has been presented to program staff to increase their understanding of the types of

programming options that exist, and a session titled; “Understanding Casework Decisions and the Uniform Case Record”, is being presented to technical staff to help them understand the types of decisions caseworkers make on a daily basis.

Some of the other areas in development follow. Work has begun on a review of the security approach for the new development. The Financial Management Team has been collaborating with OCFS Policy and local districts to determine the user requirements for financial eligibility for IV-E, EAF and TANF-200%. The team has also been working on the development of an Eligibility Worksheet. In addition, preparation for user groups is underway, in anticipation of bringing local staff in to review the work done on the Phase I requirements.

### **Steering and Management Committee**

The Joint Steering and Management Committee met at the NYPWA Conference on July 18, 2001. Topics of discussion included an update on project status and activities. Committee members also shared a letter of support, which was received from several local districts, regarding the continuation of the CONNECTIONS project. The proposed plan for development of the case management and financial management portions of the CONNECTIONS application were also reviewed and approved by the Committee, and a draft of the workgroup recruitment announcement was shared with Committee members.

### **Data Warehouse**

In the forgoing months the Data Warehouse staff focused on a number of areas, including the following: providing demonstrations and overviews of the Data Warehouse to a variety of audiences; improving the consistency and formatting of Data Warehouse reports; expanding the range of data available through the Data Warehouse to include five years of CCRS movement data; and modifying the Data Warehouse refresh process, and related programs, in order to expedite the weekly run.

In addition, a recruitment invitation for Phase II distribution of the Data Warehouse was shared with all local districts and voluntary agencies that provide foster care services. To date, responses have been received from twenty-nine districts and twenty agencies.

### **Technical Upgrade and Equipment**

Over the last three months, a number of significant activities took place across the CONNECTIONS project resulting in the rollout of Citrix servers for fifty-one local districts across the State. CONNECTIONS program and technical staff worked in collaboration with the Office of Technology to support this implementation effort. The CONNECTIONS Application was upgraded to Windows 2000 in order to run in the Citrix environment, and a new training and communications approach was developed to automate instructions for users and post them directly on the CONNECTIONS logon page. At this time, the schedule for implementation of Citrix in the remaining local districts and voluntary agencies across New York

State is being assessed in light of the September 11, 2001 tragedy at the World Trade Center and the necessary infrastructure upgrades.

The New York State Comptroller's Office approved the award for the rollout of new desktop workstations in September. An informational letter will be forthcoming which will define the process for requesting supplemental equipment. In addition, a plan and related schedule is being developed to support the PC rollout. The configuration of the new PC's has been upgraded to: 933Mhz processor, 256 Meg Ram, 20 Gig hard drive, and CD-ROM with an accompanying 17" monitor.

## **Changes To Current Functionality**

### **Build 14 Developments**

Build 14, currently scheduled for distribution to the field in December 2001, will include the CPRS, as well as significant improvements to person search, fatality tracking, workload management, and foster/adoptive (FAD) home closings and fingerprint notification letters.

The system changes for the CPRS are in the final stages of user testing. For the past several weeks, users from local districts have been reviewing the changes in the test lab in Albany. The CPRS provides a multi-tabbed summary, which combines CONNECTIONS recorded information with case notes to present a more complete view of each investigation. The CPRS features a default template for entry of investigative progress notes, or, at local district option, a locally designed template specific to each district. Eight local districts have submitted templates, which will be supported when Build 14 is implemented. Additional districts may submit templates for implementation subsequent to Build 14.

Additional system modifications scheduled for implementation with Build 14 have completed the construction phase, and are now in Product Test. Following Product Test execution, Build 14 will move to User Acceptance Testing.

### **Build 15 Developments**

Most of the design work for items scheduled for implementation in Build 15 (May 2002) has been completed, and many items are in construction. Major items in Build 15 include additional person and resource search improvements, vacancy control, enhanced capabilities for person and case data maintenance, ease of use improvements in navigation and workload management areas. Additionally, several new features to support the FAD workflow process will streamline home development and maintenance and provide a comprehensive case and homestudy record.

## **Training, Communications and Implementation Support**

### **Training**

During this quarter the four current training courses continued to be delivered: Advanced FAD for Experienced Workers, Child Protective Services (CPS) Investigation, Building Blocks and the Basic FAD course. The CPS Investigation course provides a two-day overview of the

basic CPS functionality for new workers. Its delivery is coordinated with the delivery of the Core training in each region. In addition, an adaptation of the CPS Investigation Course was developed and implemented specifically for ACS workers.

Work has continued on a 2 Volume Step by Step Guide for FAD workers that should be completed by mid-September. Also, progress has been made in producing Step-by-Step Guides for OCFS Regional Staff to use in licensing Congregate Care settings; for local CPS users to use with Search Techniques; and in completing Data Maintenance Tasks. We expect that all three of these guides will be completed during the current quarter. We have also begun work on a guide and training curriculum to introduce workers to the Cognos software tools and data that will be available to local staff in the Data Warehouse. Plans are to pilot this training in late October and to begin providing it on a regular cycle in November.

Also, work has been completed for a job aid and video to support the implementation of the CPRS. A training curriculum is in development and will be completed in mid- September. In addition, a new format and approach to the CONNECTIONS Help system was developed for the CPRS and will be implemented with the CPRS.

### **Communications**

In July the Communications Team hosted a booth, highlighting the CONNECTIONS Project, at the NYPWA Summer Conference. A broad range of training and informational materials were made available for conference participants, including: information on CONNECTIONS technical upgrades; the redesigned CONNECTIONS Intranet site; the automated eligibility pilot; samples of new CPS and CCRS reports from the Data Warehouse; and upcoming changes in the production system, i.e. CPRS and Build 14. Additionally, CONNECTIONS staff provided demonstrations of automated eligibility, the Connections Intranet site, and the redesigned On-Line Help feature within the CPRS.

A prime task of the Communications Team, over the past few months, has been to be a conduit of support to the Technical Teams in the Citrix rollout. In addition, the team has also been solidly involved in the redesign of the CONNECTIONS Intranet site. The redesign of the site highlights a user friendly approach to accessing information and provides a means for all users of the system to directly apply the information that is necessary to complete their job functions, including completing activities within the CONNECTIONS Application itself.

### **Implementation Support**

Implementation staff have been collaboratively involved with SUNY Training Strategies staff, assisting local districts with the Citrix rollout. The Regional staff conducted meetings and worked individually with local districts to support them in preparing for the rollout of Citrix. Staff were on site in all districts on the date that Citrix was implemented. Staff also assisted both Lan administrators and users and worked with the Help Desk, as well as our project's technical staff, to identify and resolve problems on-site. Regional staff are continuing to work with those districts that are awaiting Citrix rollout.

Implementation staff have also collaborated with OFT, OCFS-IT and IBM to prepare for the installation of the new P.C.s. Preparations involve regional meetings and include written resources, such as job aids, to assist local districts in a smooth transition to the new P.C.s. In planning for the release of Build 14, staff will be conducting regional meetings and assisting local districts to prepare for modifications to the Application. The Implementation staff have also worked jointly with CONNECTIONS Design and Technical staff, and local districts, to complete locally developed templates within the CPRS.

The Implementation Team has added two Regional Implementation Coordinators. The addition of these two coordinators completes the Implementation support within the Regional Offices. The two new team members are: Andrea Straker, who is based in the Yonkers Regional Office and Cliff Pelton, who is based in the Syracuse Regional Office.