

## CONNECTIONS Transformation

### Instructions and Exercises for Using the Training Database

#### **Background:**

The CONNECTIONS Training Database (TDB) provides a simulated environment in which to practice using new or changed CONNECTIONS windows without affecting “real” data. Access to the TDB requires a special Training ID. Only one person at a time can sign-in using the same Training ID. It may be used by different people at different times. Training IDs have been made available to districts and voluntary agencies that requested them.

The layout and functioning of the windows in the CONNECTIONS TDB mirrors the actual CONNECTIONS Production system, but there are some differences:

- To access the CONNECTIONS Transformation in the Training Database, click on the icon labeled “CONX Transformation” on the CONNECTIONS Training desktop. (See Attachment A for detailed instructions to access the CONNECTIONS TDB.)
- The cases, stages, persons and caseworkers in the CONNECTIONS TDB are fictitious. When you sign onto the CONNECTIONS TDB, you are logged in as either Darryl Wilson (upstate) or Jamie Miller (NYC). There is a two or three digit numeric suffix after the last name (e.g., Wilson###) that corresponds to the Training ID that you used to log in.
- Your security rights in the CONNECTIONS TDB may be different than what you have in CONNECTIONS Production. Therefore, you may be able to see and do things in the practice environment that you cannot in your actual job.
- The TDB is refreshed daily. This means that anything you do in the TDB will be erased overnight. Therefore, you may find it helpful to complete a practice exercise, particularly a longer one such as completing a CPS investigation in one sitting. In addition, there are some transactions such as Case Merge that require an overnight batch process that cannot be performed in the training environment.

It is important that you properly log-out of the TDB. After exiting the application, you will be returned to the CONNECTIONS Training – Citrix online plug in desktop. Click on the Start button for that desktop (not the one at the very bottom (your PC desktop) and click on Log Off. Not logging off properly may prevent a co-worker from using the TDB or prevent you from using CONNECTIONS Production.

For your convenience, a series of practice exercises have been developed to guide your use of the CONNECTIONS TDB. The exercises are organized around job functions. You are encouraged to follow those exercises that are most pertinent to your regular job functions; however, you should feel free to fully explore the new windows.

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## Practice Exercises

**Please Note:** Because of limitations with the CONNECTIONS TDB, the new windows do not work with all of the stages contained on the workload. Therefore, you should avoid any stage with a 2003 or 2004 start date, unless specified in these instructions.

### All Casework Staff

- Use the Personalization feature to modify the My Workload tab to your preferences. (Note, you may not be able to change the color scheme in the TDB).
- On your workload, use the filter function to narrow the list of stages that are displayed; note the effect on the counter on the bottom right of the grid. Continue to filter until a single stage is presented.
- On another window that has a grid (e.g., To-Do, events, search, person list), hide and re-order columns, re-sort columns and use the filter to display only desired records. Note that when the window is refreshed, the grid reverts to its default settings.
- On the My To-Dos tab (or another To-Do list):
  - Select and review the details of a To-Do.
  - Open a task To-Do and navigate to the task.
  - Mark a To-Do as complete (remember, you cannot mark a Task To-Do as complete).
  - Create a To-Do. If you create a To-Do from within an INV, FAD or FSS stage, use the Task Type field to designate the task associated with the To-Do.
  - With a stage already open, navigate back to the My Workload tab, open another stage and open additional stage(s) and open at least one window in those stage(s).
  - Then open the Windows Manager to view the stages and windows within those stages that you have open.
  - Attempt to close all windows with the corresponding button. Note in particular what happens if you have a window open within the Child Protective Record Summary (CPRS), FSI, FSS or Foster Home Record Summary (FRS).

### CPS Investigation Staff

- Select the Jean Hill, Lonnie Thompson, April Gray or Sue Miller INV stage on your workload, and perform the following tasks:
  - Review the data on the sub-tabs contained on the CPS Intake window.
  - Launch and view the Intake/ IRI and Prior Case Summary.
  - Generate the Notice of Existence.
  - View allegations already recorded by the SCR.
  - Add allegations for one or more children; record the same details that pertain to date/time of incident and setting for multiple allegations at the same time.
  - Record a substantiation value for multiple allegations; change the value for one or more substantiated/unsubstantiated allegation(s) to a blank value.
  - Delete multiple allegations at the same time.
  - Enter an invalid date in a date field to note the result.
  - Record injury detail relating to at least one allegation.
  - Complete the Investigation Action Questions.
- For the same or a different INV on your workload,
  - Add a person to the stage. Use Joey Hamlin###. Navigate to the Case Summary in another case in your effort to determine if the person should be related to your INV; after adding the person, record required person detail, address, phone and role information as appropriate.

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- Navigate to the details of a stage in which you have an implied role; use Joey Hamlin### (who you added to your stage) to review the CPRS in the other stage.
- Change the primary address and phone information for the family.
- For an existing person in the stage, update person detail, address, phone, alias, and/or role information.
- Create an FSI prior to determination and make note of the resulting addition of the FSI on your workload.
- For a different INV on your workload,
  - Attempt to submit the investigation for approval; make note of the single message listing all the investigation tasks that still need to be completed.
  - Complete remaining tasks to conclude the investigation.
  - Select an **Open for Services** closure reason and make note of the resulting addition of the FSI on your workload. There is no change to the FSI windows, however, if you complete and progress the FSI, make note of the addition of the FSS on your workload.
  - Complete the *Investigation Conclusion* window and save and submit it.
  - Produce the Notice of Indication and mandated reporter letters.
- **ACS DCP Only:** select an INV stage on your workload that has a number value or asterisk (\*) in the HPF column. Navigate to the *High Priority Factors* window and to the High Priorities Factors Report.

### Preventive Services, Foster Care and CPS Ongoing Services Staff

- Generate an FSI.
  - Complete the FSI
  - Launch and view the FSI Face Sheet.
  - Progress it or send it to the local district for approval.
- Select an FSS stage on your workload and use links in the NAVIGATION PANE to explore the corresponding windows.
  - Note what occurs when you navigate directly to Progress Notes in an FSS and then close the window.
- For the same or a different FSS on your workload:
  - Access the Person List from the workload, view details about the person.
  - Enter an alias (AKA Name) for the person.
  - Complete a task that requires your supervisor's approval (e.g., FASP) and submit an approval To-Do.

### FAD Staff

- Initiate the creation of a new FAD Home complete the process for opening the home and submit to your supervisor for approval.
- Select the Angela Jarrett or Barbara Holmes FAD stage and perform the following tasks:
  - Add persons to the home and enter appropriate demographic information about those persons.
  - Enter Medical and Fingerprint information
  - Launch a Home Study
  - Change the Home Name
  - Update Training Information for one of the parents of the home
  - Generate Certificate and Approval Letter
  - Generate a FAD Report

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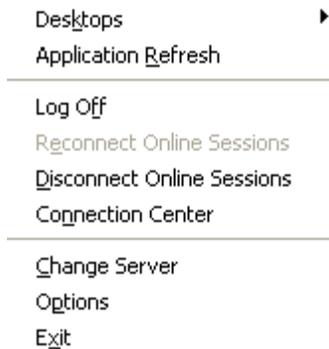
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## Attachment A

### Instructions for Accessing the CONNECTIONS Training Database

1. Right click on the Citrix Icon.  The Citrix Icon can be found in lower right hand corner of your desktop. If you are logged onto CONNECTIONS, log off by clicking on the Log Off command.



2. Right click again on the Citrix Icon. Click on the Log On link. The Citrix online plug-in window will open.



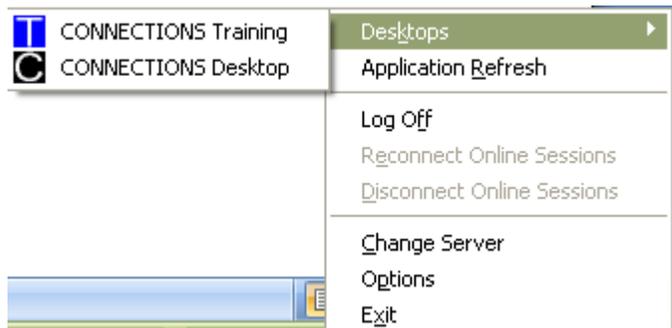
3. In the Username field, enter the Training ID. In the Password field, enter Train123 (The password is case sensitive). Click the OK button.

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4. Right click on the Citrix Icon.  Click on the Desktops command, a fly out window will appear. Click on CONNECTIONS Training.



5. Read the security message and click the OK button.

6. Click on the HSEN icon:



The ID # that appears here will match your Training ID. It will be a DU for upstate and IL for NYC.

7. On the Log-in screen, enter Train123 (This password is case sensitive)



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8. On the Citrix Training Desktop, click on the CONX Transformation icon (circled below).



*The new main CONNECTIONS window will display.*

Please note that you cannot have two concurrent Citrix sessions open at the same time. Please be sure to log off of CONNECTIONS Production before going to the CONNECTIONS TDB and vice-versa. Please be sure you are selecting the Start menu on the Citrix Desktop to log off, not the Green Start menu at the very bottom left of your screen, which will log you off of your PC.