

CONNECTIONS

Practicing Permanency Hearing Report Tasks

Training Application Guide

v1.0 (01/25/12)



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Practicing Permanency Hearing Report Tasks

CONNECTIONS Training Application Guide

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Introduction

This guide is intended for individuals accessing the CONNECTIONS Training Application to practice working with the new Permanency Hearing Reports. It will provide information and directions on the appropriate stages to use for practice.

The CONNECTIONS Training Application provides a safe environment for you to learn and practice CONNECTIONS skills using simulated case data. The CONNECTIONS Training Application has the look and feel of the Production database. Using special Training IDs, you will assume the role of a fictitious worker: Darryl Wilson or Jamie Miller. (See below for more information on how to borrow one of the special Training IDs.) Darryl Wilson and Jamie Miller have been assigned several stages of service, including CPS Investigations (INV), Foster and Adoptive Home Development (FAD), Family Services Intakes (FSI), and Family Services Stages (FSS). The CONNECTIONS Training Application is refreshed nightly; any changes you make to the stages while practicing will not be in place the next day.

The stages below are available in the CONNECTIONS Training Application to practice working with the new Permanency Hearing Reports.

Kristy Collins FSS/CWS

Stage Elements	Tasks to Practice
Three children: Patrick (17) Kimberly (9) Tyler (2) PC/PPG: Placement/Return to Parent Approved Initial FASP	Completing <i>Outside Participants, Court Information, and Docket Information</i> windows Launching Multiple Child or Individual Child report Launching PHR-No Prefill Launching PHR-Approved FASP Launching PHR-New Using Completing a PHR Deleting a PHR Submitting a PHR for review Marking a PHR as "Final"

Sherry Brown FSS/CWS

Stage Elements	Tasks to Practice
Three children: Nathan (14) Derek (11) Cindy (8) PC/PPG: Placement/Return to Parent Approved Initial FASP	Completing <i>Outside Participants, Court Information, and Docket Information</i> windows Launching Multiple Child or Individual Child report Launching PHR-No Prefill Launching PHR-Approved FASP Launching PHR-New Using Completing a PHR Deleting a PHR Submitting a PHR for review Marking a PHR as "Final"

With either of the above-mentioned FSS/CWS stages, changes can be made to the Program Choice/Permanency Planning Goal to view a PHR for Non-LDSS Custody-Relative/Resource Placement.

Sam Gilbert FSS/CCR

Stage Elements	Tasks to Practice
PC/PPG: Placement/Placement for Adoption	Completing <i>Outside Participants, Court Information, and Docket Information</i> windows Completing the Adoption Checklist Launching PHR-No Prefill Completing a PHR Deleting a PHR Submitting a PHR for review Marking a PHR as "Final"

Accessing the CONNECTIONS Training Application

Access to the CONNECTIONS Training Application is restricted based on Training IDs. Please contact your Staff Development Coordinator to obtain one of the IDs that is reserved for your local district or voluntary agency. For additional information about CONNECTIONS Training IDs, please speak with your Regional Implementation Representative.

To log on to the CONNECTIONS Training Application, refer to the CONNECTIONS Tip Sheet: *Accessing CONNECTIONS*, which is located on the OCFS CONNECTIONS intranet site:

<http://ocfs.state.nyenet/connect/jobaides/jobaides.asp>

Practicing Permanency Hearing Report Tasks with the CONNECTIONS Training Application

Filtering for a Stage

- 1 Click in the blank field below the **Stage Name** column header.
- 2 Type first three (3) letters of the last name.



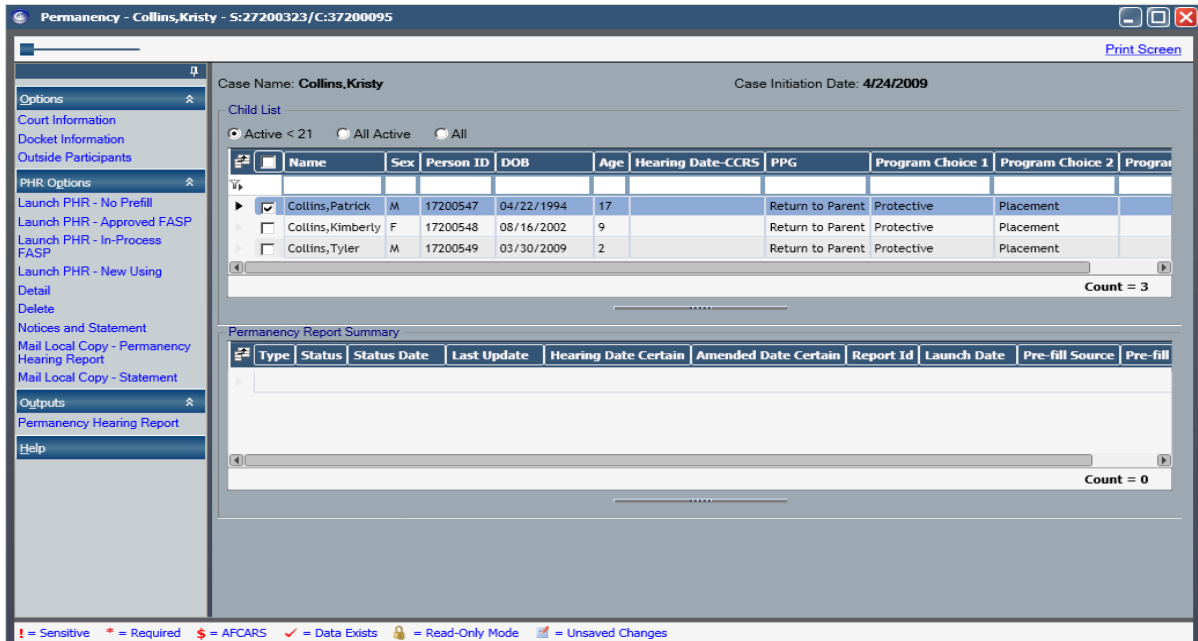
My Workload		My To-Dos			
Last Refresh: 1/13/2012 7:55:36 AM					
	New	!	Stage Name	Stage	Type
<input type="checkbox"/>			coll		
<input checked="" type="checkbox"/>			Collins, Kristy	FSS	CWS
<input type="checkbox"/>			Collins, Kristy	INV	INI

Accessing the New Permanency Window

- 1 Select the desired stage on the **My Workload** tab.
- 2 Click the **Permanency** link in the **NAVIGATION PANE**.

The New *Permanency* Window

The new *Permanency* window will serve as the “home” of PHR functions within CONNECTIONS. Within this window, you will be able to launch, view, modify, print, and delete Permanency Hearing Reports, and generate Notices and Statements. You will also be able to record and maintain court information, docket information, and outside participants from this window anytime using separate, individual windows that are housed outside the PHR.



The window will be comprised of the **NAVIGATION PANE** and two main sections: the **Child List** grid and the **Permanency Report Summary** grid.

NAVIGATION PANE Links

Options	PHR Options	Outputs
<ul style="list-style-type: none"> Court Information Docket Information Outside Participants Adoption Checklist (for FSS/CCR stages only) 	<ul style="list-style-type: none"> Launch PHR – No Pre-fill Launch PHR – Approved FASP Launch PHR – In-Process FASP Launch PHR – New Using Detail Delete Notices and Statement Mail Local Copy – Permanency Hearing Report Mail Local Copy – Statement 	<ul style="list-style-type: none"> Permanency Hearing Report

Information Housed Outside the PHR

Accessing the Outside Participants Window

- 1 Click on the **Outside Participants** link in the **NAVIGATION PANE** of the *Permanency* window.

This window will allow you to record information about an individual who does not appear in the Stage Composition, thereby adding him/her as an individual who may receive Notice of the Permanency Hearing.

Name	SFR Role	Relationship	Interest
White, Frank	Third Party Reviewer		

Count = 1

Accessing the Court Information Window

- 1 Click on the **Court Information** link in the **NAVIGATION PANE** of the *Permanency* window.

This window will allow you to record court information for purposes of completing the Permanency Hearing Report, Permanency Hearing Notices, and the Permanency Hearing Statement.

Family Court Address

Hearing Information

Petitioner

Petitioner Attorney

Accessing the Docket Information Window

- 1 Click on the **Docket Information** link in the **NAVIGATION PANE** of the *Permanency* window.

This window will allow you to record docket information that will populate the Title Page of a Permanency Hearing Report.

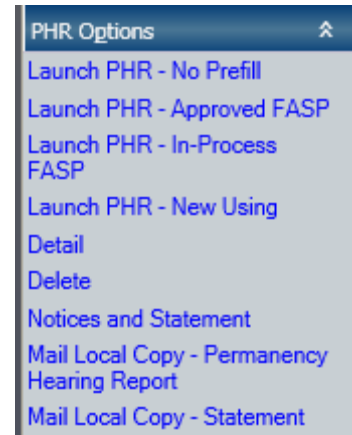
Name	Sex	Person ID	Age	DOB	Hearing Date: CCRES	PPG	Program Choice: 1	Program Choice: 2	Program Choice: 3
Collins,Patrick	M	17200547	17	04/22/1994			Return to Parent	Protective	Placement
Collins,Kimberly	F	17200548	9	08/16/2002			Return to Parent	Protective	Placement
Collins,Tyler	M	17200549	2	03/30/2009			Return to Parent	Protective	Placement

Count = 3

The Launch Process

This process will allow you to launch an Individual, Multiple, or Freed Child Permanency Hearing Report. There will be four available launch types on the **NAVIGATION PANE** that will allow you to choose the area of the system from which to retrieve data:

- **Launch PHR-No Prefill** - PHR will not pre-fill from any Approved or In-Process FASP; however information from Stage Composition, Tracked Children Detail, the Relationship Matrix, Education, and Health Services will carry over.
- **Launch PHR-Approved FASP** - PHR will pre-fill with narratives from the most recent Approved FASP or Plan Amendment.
- **Launch PHR-In-Process FASP** - PHR will pre-fill with narratives from the In-Process FASP or Plan Amendment.
- **Launch PHR-New Using** - PHR will pre-fill with information used in the PHR selected in the **Permanency Report Summary** grid. When selecting a PHR from which to pre-fill, you cannot select one belonging to a different child; you must use a previous report of the same child.



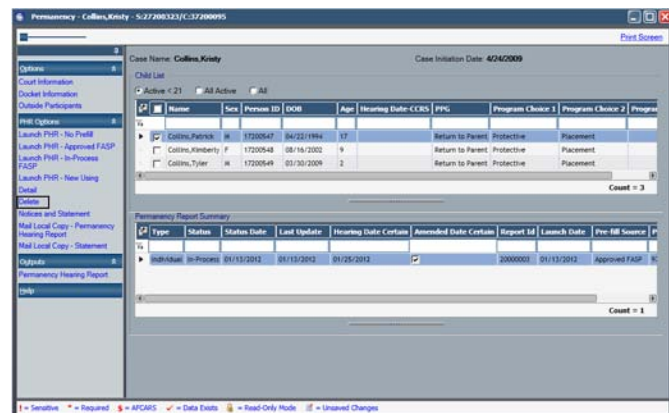
Launching a PHR

- 1 Select the desired child(ren) in the **Child List** grid.
- 2 Click on the desired launch link in the **NAVIGATION PANE**.

After launching the PHR, you will be able to work within the various report sections, which do not have to be completed all at once. After saving and closing any work you complete, you will be taken back to the *Permanency* window. If or when you need to return to the PHR to complete your work, you will use the **Detail** link.

Accessing a PHR

- 1 Select the appropriate child(ren) in the **Child List** grid.
The Permanency Report Summary grid populates.
- 2 Click on the in-process PHR in the **Permanency Report Summary** grid.
- 3 Click on the **Detail** link in the **NAVIGATION PANE**.



Working Within the PHR

Upon entry into the Permanency Hearing Report, you will always be brought to the Title Page. The Title Page will contain the links on the navigation pane that will allow you to navigate to the various section windows of the Permanency Hearing Report.

The screenshot displays the 'Title Page' of a Permanency Hearing Report. The window title is 'Title Page - Collins, Kristy - S:27200323/C:37200095 [Unsaved Changes]'. The navigation pane on the left contains the following links: 'Options', 'Save', 'Permanency Plan Summary', 'Efforts to Finalize Permanency Status of the Child', 'Discharge/Transition Plan Check PHR Detail', 'Review Complete with Comments', 'Review Complete with No Comments', 'Outputs', 'Permanency Hearing Report', 'Title Page', 'Verification Page', and 'Help'. The main content area is divided into sections: 'Hearing Information' with fields for 'Hearing Date Certain' and 'Time of Hearing'; 'Title Page' with 'PERMANENCY HEARING DATE CERTAIN' and 'Docket #: 37200095'; a table for 'IN THE MATTER OF: Patrick Collins (17)'; and 'Agency Representatives' with fields for 'Case Name', 'Case Manager', 'Case Planner', and 'Agency with Planning Responsibility'. The table has the following data:

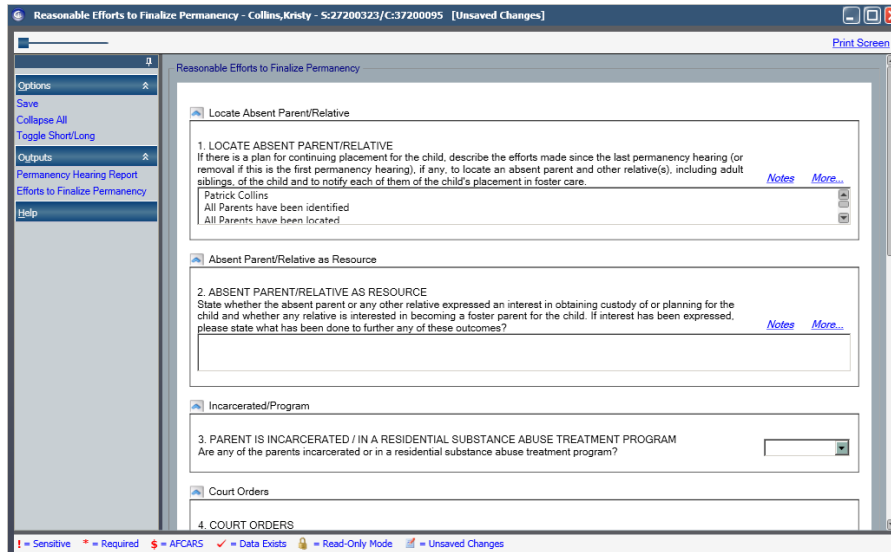
Date of Births	Sex	Person ID (PID)	Docket Number	Date of Initial Removal	Date of Current Placement	Type of Placement
04/23/1994	Male	17200547			04/24/2009	Certified Foster Home

In the **NAVIGATION PANE** are four links that correspond to the PHR sections:

- Permanency Plan Summary
- Efforts to Finalize Permanency
- Status of the Child
- Discharge/Transition

Each of these links opens a window containing all questions for that section, and fields for you to record your answers. These four windows appear and function the same.

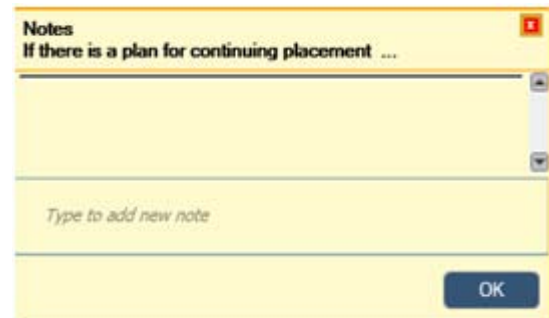
The New PHR Features



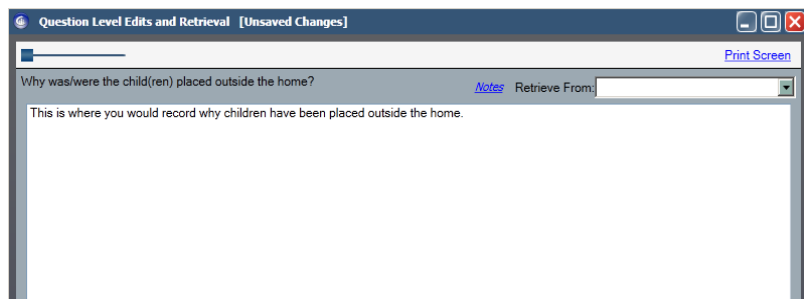
Collapse All - This **NAVIGATION PANE** link will allow you to collapse all sections/questions on the window, which will minimize the need for excessive scrolling. This link will not be available on all windows.

Toggle Short/Long - This **NAVIGATION PANE** link will allow you to toggle between the long and short (abbreviated) versions of a question. By default, the long version displays. Not all questions will have a short version.

Notes - This link will display above PHR question and narrative fields. Clicking it will display a *Notes* window, which will allow co-workers/supervisors to communicate issues regarding the associated question. This is an optional, informal means of communication meant to replace the need for excessive emails and other forms of manual communications.



More... - This link will display next to the **Notes** link. Clicking it will display the *Question Level Edits and Retrieval* window, which displays the associated question in full screen editor mode with text control tools. This window will also provide access to the Retrieve From function, which you can use to retrieve information for the question from one or more other sources.



PHR Outputs

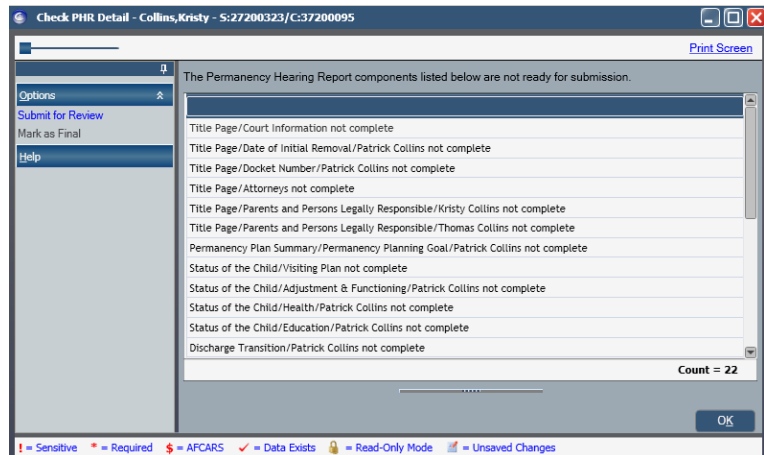
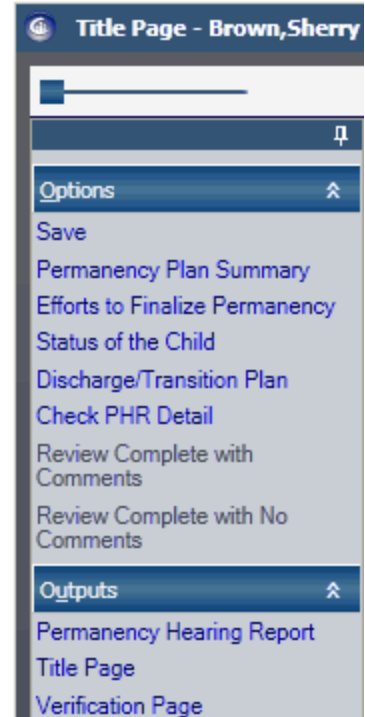
On the **NAVIGATION PANE** of a PHR's Title Page, there will be links for printing either the entire PHR or just the section on which you are working.

Check PHR Detail

The **Check PHR Detail** link will be located on the Title Page of a PHR. It will be used for all PHR types to determine if the required report components are complete. A report must pass specific system edits before it can be marked as "Final." Once the report passes all required edits, the **Mark as Final** link will enable.

Checking for Report Completion

- 1 Select the child(ren) in the **Child List** grid.
*The **Permanency Report Summary** grid populates.*
- 2 Click on the in-process PHR in the **Permanency Report Summary** grid.
- 3 Click on the **Detail** link in the **NAVIGATION PANE**.
*The **Title Page** displays.*
- 4 Click on the **Check PHR Detail** link in the **NAVIGATION PANE**.
*The **Check PHR Detail** window displays.*



The Submit for Review Process

The *Check PHR Detail* window also provides access to the **Submit for Review** link. Clicking this link will submit the in-process PHR for review to another CONNECTIONS User. By default, this is the submitting worker's supervisor; however, this may be changed according to the policy of your district/agency.

Submitting a PHR for Review

- 1 Select the child(ren) in the **Child List** grid.
*The **Permanency Report Summary** grid populates.*
- 2 Click on the in-process PHR in the **Permanency Report Summary** grid.
- 3 Click on the **Detail** link in the **NAVIGATION PANE**.
The Title Page displays.
- 4 Click on the **Check PHR Detail** link in the **NAVIGATION PANE**.
The Check PHR Detail window displays.
- 5 Click the **Submit for Review** link in the **NAVIGATION PANE**.
The To-Do Detail window displays.

The screenshot shows the 'To-Do Detail' window with the following details:

- To-Do Data:**
 - Due Date: 1/13/2012
 - Assigned To: May79,Sally
 - Task Type: [Dropdown]
 - Completed: [Date Field]
 - Task Description: PHR ready for review
- Comments:** PHR has been submitted to you for review.
- Case/Stage:**
 - Stage: Collins,Kristy
 - Staff: Wilson79,Darryl
 - Task: PHR ready for review
 - Task Due Date: [Date Field]
- Created By:**
 - Worker Name: System
 - Date: 1/13/2012

Buttons: Print Screen, Save & Close

Status Bar: ! = Sensitive * = Required \$ = AFCARS ✓ = Data Exists 🗝 = Read-Only Mode 📄 = Unsaved Changes

Please note: Supervisors in the CONNECTIONS Training Application are Sally May or Cassie Landers.


Locating a Supervisory To-Do to Review a Submitted PHR

Submitting a report for review will create a navigable To-Do that will allow the reviewer to view the PHR windows and add comments using the **Notes** link. When the reviewer clicks on one of the **Review Complete** links, a navigable To-Do will be sent to the submitter informing them that the review is complete.

Name	Primary	Secondary	Case Mgr	Case Plnr	Case Wkr	CPS W/M	Total Cases
May79, Sally							
Wilson180, Darryl R	22			7			20
Wilson79, Darryl	24	1		7			23

Type	Status	Date	Case Name	Stage ID	Stage Name	Description	Created By
Navigate	T	01/13/2012	Collins, Kristy	27200323	Collins, Kristy	PHR ready for review	System

Navigating to a Submitted PHR as a Supervisor

- 1 From the main CONNECTIONS window, click on the up arrow () for the **Search Other Units/Workloads** section.
- 2 Select Sally May### or Cassie Landers###.
(This will be the Unit Supervisor for the Training ID you are using.)
- 3 Click on the **Go** button.
A pop-up message displays, stating that the supervisor does not have a workload.
- 4 Click on the **OK** button.
- 5 Click on the **To-Dos** (Supervisors Name) tab.
- 6 Filter for the Stage Name of the PHR submitted for review.
- 7 Click on the **Navigate** link for the “PHR ready for review” To-Do.
The Title Page displays.

Reviewing Supervisor Comments

Once the review is complete, the reviewer/approver should click on the **Review Complete with Comments** link if notes were recorded, or the **Review Complete No Comments** link if no comments were recorded.

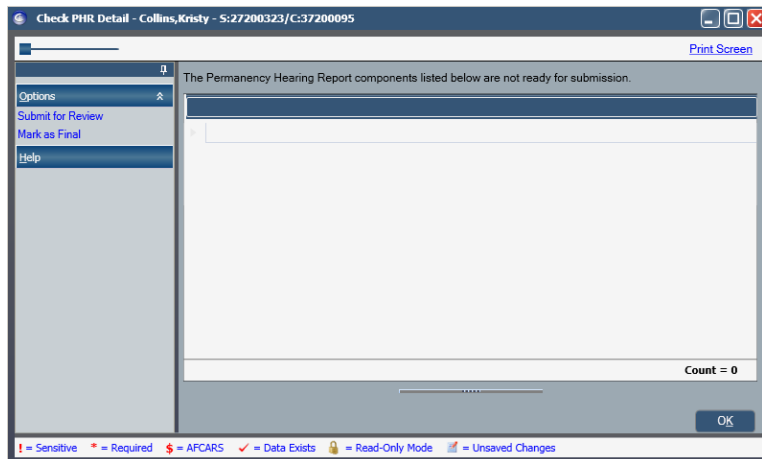
Navigating to a Reviewed PHR

- 1 Click on the **My To-Dos** tab.
- 2 Filter for the Stage Name of the reviewed PHR.
- 3 Click on the **Navigate** link for the “Review Complete...” To-Do.
The Title Page displays.

Type	Status	Date	Case Name	Stage ID	Stage Name	Description	Created By
Navigate	NEW	07/02/2009	Collins,Kristy	27200321	Collins,Kristy	Safety Assessment is due and must be submitted to Supervisor for approval.	System
Navigate	NEW	08/04/2009	Collins,Kristy	27200321	Collins,Kristy	Risk Assessment (RAP) is due and must be submitted to Supervisor for approval.	System
Navigate	NEW	08/21/2009	Collins,Kristy	27200321	Collins,Kristy	Investigation is due and must be submitted to Supervisor for approval.	System
Navigate	PROC	01/13/2012	Collins,Kristy	27200323	Collins,Kristy	PHR review complete with comments.	DW

Mark as Final

The PHR must pass all submission edits on the *Check PHR Detail* window before it can be marked as “Final.”



Marking a PHR as “Final”

- 1 Select the child(ren) in the **Child List** grid.
*The **Permanency Report Summary** grid populates.*
- 2 Click on the in-process PHR in the **Permanency Report Summary** grid.
- 3 Click on the **Detail** link in the **NAVIGATION PANE**.
The Title Page displays.
- 4 Click on the **Check PHR Detail** link in the **NAVIGATION PANE**.
The Check PHR Detail window displays.
- 5 Click on the **Mark as Final** link in the **NAVIGATION PANE**.