CONNECTIONS
Q2-08 Improvements
(Build 18.9.7 Release Notes)

-- Implementation Date: June 27, 2008 --

[This document provides a description of the modifications, enhancements, fixes and impacts that are included in this quarter's improvements.]

Contents of the Q2-08 Improvement Plan (Build 18.9.7 Release Notes)

CONNECTIONS improvements implemented in response to SIRs and Change Requests are referred to as "Builds." Since these improvements are implemented on a quarterly basis, going forward, these will be called Quarterly Improvement Plans; e.g., Q1-08; Q2-08; Q3-08 and Q4-08. The Q1, 2, 3, or 4 means the three-month quarter beginning in January, and the "08" means 2008.

Build 18.9.7 is being referred to as "Q2-08." Q2-08 introduces several important changes that will improve the CONNECTIONS system. Many of the enhancements included in this Build originated from a collaborative effort on the part of OCFS, local district and voluntary agency casework and supervisory staff, who were members of the Functional Improvement Team (FIT). Additionally, items have been identified based on recommendations from the Child Welfare System Transformation Business Team. Improvements are being implemented in five functional areas.

- Reports
- Family Assessment and Service Plans (FASPs), including the Service Plan Review
- Permanency Hearing Reports
- Progress Notes
- Security

Below is a list of items considered most significant for caseworkers:
- Child Protective Case Summary: Prior Case Summary Report
    With the implementation of Build 18.9.7 (Q2-08), CPS workers will be able to generate a CPS Prior Case Summary Report, which provides a summary of the entire case history of family members in a new CPS intake or investigation.

- Closed Person Stage Involvement Report
    Prior to Build 18.9.7 (Q2-08), when a Person Merge was completed, CONNECTIONS did not retain the stage-specific history for the closed person. If the merge was completed in error, the lack of the closed person's history made the split process difficult to accurately complete. With the implementation of Build

18.9.7 (Q2-08), stage-specific information for the closed person will be stored by the system, and a report can be generated listing the stages and the role of the closed person prior to the merge. If a split becomes necessary, this report is to be used as the starting point in rebuilding the closed person's history.

- Security: Maintain Education Business Function

  With the implementation of Build 18.9.7 (Q2-08), the MAINT EDUCATION Business Function is available and associated access is supported in CONNECTIONS. Although the Enter Education Security Attribute was made available in a previous Build, it becomes operational with the MAINT EDUCATION Business Function created in Build 18.9.7 (Q2-08). This Business Function, in conjunction with the CASE/PERS SEARCH or CASE SEARCH Business Function provides workers *without* a role in the stage with the ability to view and record education information. This Business Function provides access only to the Education functionality, allowing workers who specialize in educational services to complete their work.

- Accessing Progress Notes

  In order to access progress notes more easily, a **Progress Notes** button has been added to the *Assigned Workload*. This button is enabled when only one stage is selected on the workload. Clicking on the **Progress Notes** button opens the *Progress Notes List* window for that stage. Closing the *Progress Notes List* window when accessed this way returns you to the *Assigned Workload*.

- Family Assessment and Service Plans (FASPs)

  Enhancements to the FASP Tree

  With Build 18.9.7 (Q2-08), the FASP tree will be modified to include additional indicators to help you identify sections of the FASP that are required in order to complete the FASP, or that can be optionally completed, or that are not applicable.

- Enhancements to the Check FASP Detail Component Status Window

  With the implementation of Build 18.9.7 (Q2-08), the Check FASP Detail process is made simpler. When a FASP component is incomplete, you can navigate directly from the Check FASP Detail Component Status window by clicking on an incomplete component. This action opens the first tab of the selected

component, allowing you to complete any necessary work on that tab or, if necessary, to navigate to other tabs within that component. Upon closing the selected component, the *Check FASP Detail Component Status* window displays.

- Approval To-Do Enhancement for Multiple Approvers
  With the implementation of Build 18.9.7 (Q2-08), in all situations that require multiple approvers (FASP, Plan Amendment and Removal Update), upon selection of a To-Do that is not ready for approval, the user will receive a message that says, " This To-Do is not yet ready for approval- do you want to review?" User can select yes option to review or the no option to back out. This will make for a more efficient process, minimizing time spent in attempting to approve work that necessitates muti-level approvals which must be made in a defined sequence.

- Permanency To-Dos
  With the implementation of Build 18.9.7 (Q2-08), Permanency Hearing Report To-Dos display as Alert To-Dos. This will eliminate the error you received when attempting to navigate from a Permanency Hearing Report Task To-Do.

- Adoption Finalization/Stage Closure
  With the implementation of Build 18.9.7 (Q2-08) improvements have been made in the processes to record a finalized adoption and close/seal the associated CCR Stage. The system will now require information on the *Finalize Adoption* and *AFCARS Adoption Information* windows before you can save an Adoption Finalized closure reason.

Definitions of the terms used in this document

The *Functional Area* section identifies the part of the application that is involved in the improvement, modification, enhancement or fix. The *Issue Description* section describes the issue that will be resolved. The *Fix/Impact* section describes what the improvement is expected to accomplish (impact), and the *SIR ID* section identifies the internal tracking number of that request.

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Resource Tools - Impact Analysis documents and Job Aid

Two Impact Analysis documents and one job aid (System Build 18.9.7 (Q2-08) Job Aid) are available on the CONNECTIONS website. The Impact Analysis provide information on the following topics:

- Child Protective Case Summary: Prior Case Summary Report
- Security: Maintain Education Business Function

Questions, please refer to the following resources

- If you have questions about local practice, policy or procedures, we ask that you first review these procedures with your supervisor.
- For all other CONNECTIONS related questions you can contact:
  - the APP HELP mailbox by filling in the form titled: *CONNECTIONS Application Help Request* (posted to the CONNECTIONS intranet on the CONNECTIONS Forms page) and emailing the completed form to the following address: ocfs.sm.conn_app@ocfs.state.ny.us*.* A few points about the address: please note that there is one underscore in the address, and the underscore has to be typed into the address in order for the email to be directed to the correct mailbox, and if you are emailing 'out of our network' we ask that you tack on the following piece to the address: @dfa.state.ny.us or, @nysemail.state.ny.us
  - the NYS OFT Enterprise Help Desk 1-800-697-1323
- Any additional WMS questions should be directed to the OCFS-IT Customer Support Help Line at 1-800-342-3727.
- BICS issues should be reported to the BICS hotline at 1-800-342-3010.

- SSPS issues should be reported to either Nancy Pare at 212-383-1382 or Maureen Godwin at 212-383-2483.

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NYS Office of Children and Family Services
Q2-08 Improvements (Build 18.9.7 Release Notes)

Functional Area	Issue Description	Fix Impact	SIR ID
FASP			
FASP – Supervisory Review	Scroll bar arrows and text are disappearing when a supervisor enters comments in a FASP submitted for review.	The fix remedies the action of the Scroll bar arrows and text disappearing from the Supervisory review of a FASP.	6101
FASP	The worker receives an error message when they click on the Check FASP Detail Button in the following situation: a Plan Amendment (PA) is launched, and a component is added relative to the existing program choice, and then that Program Choice is End-dated.	The error handling is corrected to allow the worker to End-date the Program Choice in this situation and not receive the error.	7178
FASP	When a worker enters information on a Risk Assessment Profile (RAP), double clicks save, closes and then clicks yes to the pop-up message, an error appears and the worker is unable to save the RAP.	The worker will no longer receive the error message after entering the RAP information, saving, closing and clicking yes to the pop-up message.	7641
FASP - Report	Non-LDSS Custody component report does not display the Life Skills Assessment (LSA) section when the LSA is the only component completed.	If only the LSA component is completed on the Non-LDSS Custody node for a child with a Program Choice of Non- LDSS Custody, it will display on the Non-LDSS Custody component report.	7680
FASP - Report	FASP reports for Non-LDSS Custody do NOT display the Life Skills Assessment (LSA) in all appropriate situations.	LSA is displayed in the report, if it has been chosen and info entered regardless of the child's program choice.	7687
FASP	When a child has a Program Choice (PC) of Non-LDSS custody, the Visiting Plan Grid is printing with just the questions even though nothing has been entered in this area.	The Visiting Plan section will no longer print on the Final FASP report when the child has a PC of Non-LDSS custody and no visiting plan was created.	7688
FASP	The FASP tree does not identify which components are required in order to complete the FASP, or that can be optionally completed, or that are not applicable.	The FASP tree has been modified to include additional indicators to help identify sections of the FASP that are required in order to complete the FASP. The indicators are: Required, Optional and Not Applicable. Please refer to the Job Aid for the specific display conditions.

The indicators will be displayed only for a FASP and not a Plan Amendment. | 7852 |

FASP	Currently, when the worker clicks on the Check FASP Detail button to see the list of any incomplete components, the worker must close the window and navigate from the FASP tree to the incomplete FASP component to address the issue.	Once the Check FASP Detail window has been opened, the user may select a component that is incomplete and navigate directly to the first tab of that component. The user may move from tab to tab within the component. Upon closing that component - focus will return to the Check FASP Detail window where a new pushbutton will be enabled to allow the user to refresh the list. When the user selects this pushbutton the check FASP detail edits will be run and the error list refreshed.	7853
FASP	When a stage is pending closure, the Tracked Child Detail (TCD) Removal Information tab controls are inappropriately enabled.	When a stage is pending closure, users will be able to enter the TCD Removal Info tab in Browse mode and all controls on the window will be disabled.	8202
Functional Area **FSS**	**Issue Description**	**Fix Impact**	**SIR ID**
Family Services Stage - RAP	Intermittent errors occurred when accessing or launching a RAP.	The fix will prevent the error.	4663
Assign Family Services	The Historical Stage Person Link table contains a row for anyone end-dated from a stage (FSI or FSS). The table contains both workers and stage members. Currently, the date of assignment for a worker is not written to the table - only the date of un-assignment is populated.	The system will write the date the worker was assigned to the stage in addition to the date of un-assignment to maintain the full picture for the worker's role in the particular stage.	7234
Tracked Child Detail	If a worker tries to end date a Program Choice for a tracked child in an FSS, and that program choice effective date is prior to end-date of any program choice for that person in another stage, the worker receives this error message: "Effective date cannot precede the prior program choice end-date. Please re-enter." This happens as the result of a merge where the child has been in 2 separate FSS stages with 2 different PIDs.	The error message will no longer display when the user attempts to end date the program choice.	7423

Tracked Child Detail	Current functionality does not display Removal Information of end-dated children within Tracked Child Detail - Removal Information window. As a result historical removal information for the end-dated child can never be viewed.	The worker will be able to see historical removal information on an end-dated child from the Removal Information Window of Tracked Child Detail.	7649
FSS Case Summary	Some CCR cases were closed without the Finalized Adoption Window being completed. If the adoption finalization has not been saved before the CCR is closed, the record is not sealed, and essential information is not recorded.	This fix will prevent stage closure when the user attempts to close the CCR stage without required Adoption finalization information. Upon selection of one of the Adoption Finalized closure reasons, a message will pop-up that states that the Finalize Adoption and AFCARS windows must be complete in order to proceed with closing the stage.	7741
FASP - Reports	When the Program Choice of the child is Non-LDSS Relative/Resource Placement and Life Skills Assessment (LSA) is added to the in-process FASP via the add component, the LSA section does not appear on the Non-LDSS Relative/Resource Placement or the All Foster Care Issues Reports.	The LSA entered information will appear in these reports.	7745
FSS - CCR Finalize Adoption	There are some CCR cases in which an adoption finalization occurred, but the case was closed without the Finalized Adoption Window being completed.	This fix allows a designated state employee to enter the required, missing information provided by the local district for this group of cases. An event will be created to capture this maintenance activity.	8085

Functional Area PERMANENCY	Issue Description	Fix Impact	SIR ID
Permanency	When working in a PHR, user is closed out of CONNECTIONS and cannot access PHR again.	The fix remedies the intermittent application close out that workers experienced and they will no longer be closed out of CONNECTIONS when working in a PHR	6530
Permanency	Users cannot enter the completed date for 3 sections of question #8 of the Freed Child Permanency Hearing Report. The date field is disabled for the Criminal History Record Check, the SCR Database Check and the Interstate Compact on the Placement of Children. These fields are supposed to be fully enterable.	The Permanency Hearing Report Template is updated to allow entry of dates into these fields as required.	7407

Permanency	Upon normal save of the Permanency Hearing Report, the system writes the report to the T: drive then moves the file from the T: drive to the database. The window refreshes and the document which was saved to the database is displayed. Any autosave version of the document is deleted. Currently, if there is an unexpected error in writing to the T: drive, the user receives a message that "Document has not been saved", but then the system still moves the file from the T: drive (which did not save properly) to the database. This is a bug in the error handling on the save. The window then refreshes and the (possibly faulty, possibly corrupted) document which was saved to the database is displayed (which could cause an application error). Any autosave version of the document is still deleted.	In the event that an error occurs and a document cannot be saved to the users T drive, the system will now leave the information in the condition it was in at the point of the last <u>successful</u> save. The file can be recovered by the Help Desk. If, however, that particular report is updated again and saved prior to helpdesk intervention, the information will be overwritten with the last version that was saved.	7537
Permanency	The worker receives an error message when launching a new Permanency Hearing Report indicating that the treatment field in the report is not large enough for the data.	The field will now accept and display information accurately. The error will no longer be generated. This fix only applies to new reports.	7838
Permanency	Currently all SPR/ Permanency To-Do's are TASKS and can only be processed by the worker to whom they were assigned. Workers try to Navigate the TASK to complete it resulting in a Data Access Error. Also, if a worker leaves an Agency and these TASKS are were not completed a Data Fix must be done to eliminate them so the worker can be end-dated from the CONNECTIONS application.	Newly created SPR/ Permanency To-Do's will be changed to ALERTS which will not generate data access errors. If the Date Certain retrieved from CCRS is in the past, an Overdue Permanency Report Alert will be generated.	7990
Permanency	If number bullets are included in the user entered text when answering questions within in the Permanency Hearing Report, protected subsequent question numbers change in sequence.	Numbers in protected sections will no longer change when using the number bullets icon on the toolbar.	8334
Functional Area **CPS/FSS**	**Issue Description**	**Fix Impact**	**SIR ID**
CPS - Prior Case Summary	There was no report of prior case history that included all cases/stages. The current IRI is limited to Intake and Investigation stages.	The Prior Case Summary Report is designed to allow CPS workers to print a summary of the cross reference history of family members presenting in a new CPS	7114

Report		intake or investigation. The report pulls additional background information to supplement current IRI information, outside the CPS environment from the Services Stage. The report is accessed by highlighting an Intake or Investigation stage on the Assigned Workload Window and choosing the "Prior Case Summary Report" menu item under the Reports menu. Once generated the report will be posted to the Reports list. Once the user has opened the report on the Reports List window, the report will be deleted from the Reports list.	
INV	Multiple problems exist with the 24 hour and 30 day fatality reports. Each time a user goes into the report, an additional piece of data gets added. This can Include, *but is not* limited to, the DOB, DOD, Region and Reason A/N. In Section III, Date Investigation begun is pulling the earliest Oral report date, and NOT the date of the report in which this Fatality Report is being generated. The Name field identifies the Supervisor, not the Caseworker, and no titles for either Caseworker or Supervisor are present.	Report will only present one (1) line of data for each child identified as a Fatality in both the 24 Hour & 30 Day Fatality Reports. Caseworkers Name and Title will be presented, along with Name & Title of the Case Worker's Supervisor.	7683
Assign Workload Window	Case workers and supervisors who are entering Progress Notes indicated that they wanted a simpler and more direct path to Progress Notes instead of navigating into and out of multiple stages.	A pushbutton will be added to the Assigned Workload window that will be enabled when one and only one stage is highlighted on the Workload. Selecting the pushbutton will navigate the user to the Progress Note List window. When you're in an INV stage and you create a new note and Save, you're returned to the Progress Notes Search page and are able to click on other tabs within CPRS. Within an FSS stage, when you create a new note and Save you're returned to the Progress Notes Search page and upon closing, you return to the Workload.	7841
CPS & FSS - Progress	Users have described a problem with the mouse pointer within the progress note text.	The updated version of Text Tool resolves this problem.	8337

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Functional Area **SECURITY**	**Issue Description**	**Fix Impact**	**SIR ID**
Security - Agency Access Window	The section of the window currently addressing Job Types is titled Organizational Hierarchy. Since the Job Type relates not only to Organizational Hierarchy but Agency Access Settings for Case Assignable staff, the title of Organizational Hierarchy, which is misleading.	On the Agency Access Window, the title of Organizational Hierarchy will be removed.	6520
Security	Agency Access Window - Direct Supervisory Line Set to view or maintain for Non-Clerical Staff: A user who is in a supervisory unit in the Organizational Hierarchy who has not been assigned a Job Type will default to a clerical status. Anyone who is in a parent unit in the Organizational Hierarchy who currently does not have a job type will need to be give a non-clerical job type or they will lose access to FSI and FSS stages.	If your Agency Access Window setting is view or maintain for the Direct Supervisory line, Non-Clerical Staff setting, give anyone who does not have a job type who is in a currently in supervisory unit in your Organizational Hierarchy a Non-Clerical Job Type.	7306
Security	Users requested a distinct Business Function to allow Education Specialists to maintain educational information without granting access to the rest of the case.	There will be a new MAINT EDUCATION BF added to CONNECTIONS that in conjunction with Case Search BF or CASE / PERSON SRCH BF will allow access to the Education Tab(s) of CONNECTIONS. This BF will allow access to only the Education Tab with this BF profile through the specialty path of case search/ case list/ case summary/ select stage/ options/ stage maint / maintain education.	7449
Security	Users with the specialty Business Functions Maint Health, Education, Ent Prog Notes Users should have access only to the specified section of the FSS that is allowed by the Specialty Business Function under these circumstances.	When a worker with the a Specialty BF is in the Case Summary window and selects the Events push button or Options>Event List or Options>Events Search Criteria, a security message pops up (Message currently exists) and the users will be unable to access the FSS events	8093
Security - CCR	Need to create a new Business Function for NYS OCFS staff so that state level staff can be assigned the BF to maintain	Establish new BF called ASG MN ADOP FNL.	8378

	elements on the closed CCR finalized adoption window.		
Functional Area **B2H**	**Issue Description**	**Fix Impact**	**SIR ID**
Bridges To Health	The service period of waiver services is not reduced or changed when a waiver is discontinued.	The discontinuance of a B2H Waiver will have the following impact on previously authorized B2H Waiver Services: • If entire Service auth period is before discontinuance date, no action taken. • If entire Services auth period is beyond discontinuance date, Service will be invalidated. • If discontinuance date is within Services Auth period, Services will be ended as of date of B2H Waiver discontinuance and projected cost of service will be recalculated.	7906
Bridges To Health	When a NYC B2H child is discharged from foster care, ACS manually discontinues the B2H waiver on the WMS Restriction/Exception Subsystem. The child's B2H waiver is subsequently discontinued and fails to update the Restriction/Exception Subsystem as the waiver has already been discontinued. Currently, ACS receives a NYC Post Discharge Batch Report advising them of all discontinuance transactions the fail to update the Restriction/Exception Subsystem. The report does not identify the reason for the failure.	Include the Reason Code in the NYC Post Discharge Batch Report (impact on New York City only).	7907
Bridges To Health	Currently, once a B2H Waiver is entered, user is not allowed to modify the Health Care Integration Agency, Date Enrollment Package Received and Date Child Referred to HCIA fields.	Allow user to modify the Health Care Integration Agency, Date Enrollment Package Received and Date Child Referred to HCIA field.	7910

Bridges To Health	Currently, when a user discontinues a B2H Waiver, they must enter a Date of Discontinuance and Reason for Discontinuance. The window allows the user to enter the reason of "Waiver Information Entered in Error". If the Date of Discontinuance is not equal to the Date of Authorization, the date is changed. The user does not receive any notification that the date has been changed.	A pop-up message will now appear: "Selecting this Reason for Discontinuance will set the Date of Discontinuance to the same date as the Date of Authorization in the Waiver Program. Continue?" Yes No. Selecting "No" clears the Reason for Discontinuance field. Selecting "Yes" allows the selection of the Reason for Discontinuance and sets the date in the Date of Discontinuance field to the same date as the Date of Authorization in the Waiver Program and disables the Date of Discontinuance field.	8020
Functional Area **OTHER**	**Issue Description**	**Fix Impact**	**SIR ID**
Person Relate/ Unrelate	Two issues exist in the relate process. - User is unable to relate a person in an FSI or existing FSS stage because the error message: "relate person failed. Secure CM12…save related person failed" is generated. - The relate/person code now only updates active Family Relationship Matrix (FRM) relationships.	- The error message will no longer occur. - The relate/person code will update both active and end dated FRM relationships.	4569
Resource Directory	When adding a resource to CONNECTIONS, the Auth for Clear checkbox on the Resource Detail screen was unprotected. This box should only be accessible to State workers with the maintain resource business function.	The Auth For Clearance checkbox will only be enabled for State workers with the Maint Resource business function.	7063
Staff List	The assigned workers Agency Name is displaying inconsistently in the Agency Name list. Sometimes the worker's Agency Name appears and sometimes Office Name appears.	When the field is labeled Agency Name the assigned workers Agency Name will appear in the assigned workers Agency Name list.	7560
Person	Currently, users are able to relate to a pre-adoptive PID that is returned via Person Search. Once a child's adoption has been finalized users should not be able to complete this relate.	If a row containing a pre-adoptive PID is selected from the results grid the user will now be presented with a message "Cannot relate to selected Person ID" with an OK pushbutton. Upon the click of the OK pushbutton the relate pushbutton and menu item will remain disabled.	7648

Health	When selecting customized Health History report if Clinical Appointments is selected, with a domain type of "Dental" the report will print the selected diagnoses but will not display the Dental domain.	Report will be modified to display any/all selected domain types.	7807
FAD	Currently, the system can not accommodate an additional extension on an Emergency home while awaiting the results of an out of state SCR report. Additionally, there is no out of state data base check field on the FRS report.	This fix will allow for a 90 day extension of an emergency home while awaiting the results of an Out Of State SCR report. It will also add an Out of State Database check field to the FRS report.	7948
Approvals	Currently, when there are multiple approvers on a stage, there is no way to know that a To-Do is ready to be approved.	If a user selects a To-Do that is not ready for approval, the user will receive a message that says, " This To-Do is not yet ready for approval- do you want to review?" User can select yes option to review or the no option to back out.	8012
Person Merge Split -	Person Merges are sometimes done in error, resulting in the Person Forward ID appearing in all stages\cases for the Person Closed. No history for the PID is stored after the merge for correction purposes.	A new report, "The Closed Person Stage Involvement Report" has been added to assist in correcting erroneous person merge information. When completing a Person Split, this report can be generated to use as a tool to reconstruct the person's Connections history (using Local Data Maintenance functions).	8017