

**Checklist
Case Readiness for Conversion
Build 18**

WMS Case Name: _____

WMS Case Number: _____

CONNECTIONS Case ID: _____

Case Record Activities

WMS—All Active CWS Cases (service types 01/08-CCR, 08-CWS, 17-CWS, 25-CWS, 26-CWS, ADVPO for NYC)

_____ Check WMS Case. If there is a corresponding CONNECTIONS case, check that either the WMS Case # is in the Investigation Conclusion window **or** the CONNECTIONS Case # is in WMS in the Related Case Number field.

_____ Verify individual demographic information (Name, DOB, sex, etc.) in the WMS case. Validate the CIN and demographics in CONNECTIONS for each person in the WMS case with a corresponding person record in CONNECTIONS. **Please Note: A last name must be present even if the last name is "unknown".**

_____ Verify WMS case address

_____ Verify WMS Case Manager

_____ Complete Full Data Entry on all outstanding applications. **Please Note: Cases in Application status at the time of conversion will not convert.**

_____ Correct any cases in error status. **Please Note: Cases in error status at the time of conversion will not convert.**

CCRS—All Active CWS Cases

_____ Verify office/unit/worker codes

_____ Verify Case Planner

_____ Verify Program Choice/Permanency Planning Goal-*All CONNECTIONS edits will apply. If the PC/PPG do not match the new CONNECTIONS edits, the values will not convert. Users must enter the PC/PPG in CONNECTIONS on day 1. **Please Note: If the child is over 18 and the PC/PPG does not convert, a data fix is required.**

CONNECTIONS

_____ Verify your Staff Detail data. Is the WMS/CCRS office/unit/worker code entered correctly? This is crucial for conversion to assign cases correctly.

Completed by: _____ **Date** _____