Completing the Placement Module in CONNECTIONS: Phase 3

Job Aid
Acknowledgement
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Module 1:
Introduction

Purpose of this Job Aid
The Placement module in CONNECTIONS is designed to assist districts and voluntary agencies in matching children to the best available foster care placement. The purpose of this Job Aid is to provide detail overviews of the Placement and Placement Dashboard windows, and provide instruction on how to initiate and complete a placement request.

This Job Aid is intended for workers who are assigned to Foster and Adoptive Home Development (FAD), CPS Investigation (INV), Family Services Intake (FSI), and Family Services (FSS) stages.

Overview of the Placement Module
When a child is placed by Family Court in the care and custody or guardianship of a district, it is the responsibility of that district (or voluntary agency under contract with the district) to find the least restrictive and most home-like setting in which the child can be maintained safely and receive all services specified in the child’s Service Plan. Traditionally, the home finder has created a manual method for locating placements that involves knowledge of the child and of the foster care resources available in their community. With the Placement module, however, the process of placing children is standardized and workers have quick access to all placement-related data.

The Placement module streamlines a multitude of processes for many counties that formerly handled foster care placement outside of CONNECTIONS. Workers can match placement-related child characteristics to resource-provided services on a case-by-case basis in order to obtain the best foster care resources available. This provides more stability for children in foster care and positively impacts their safety, permanency, and well-being.

Placement requests can be initiated from an INV, FSI, or FSS stage (FSS/CWS [Child Welfare Services] or FSS/CCR [Child Case Record]).

The Placement module continues to be implemented through several phases:

1. Phase 1 implemented windows that support preparatory actions for the Placement module. These actions include the recording of appropriate child characteristics, resource characteristics, and special restrictions. Additionally, the first phase implemented the Email tab for recording staff business email addresses. For CONNECTIONS to communicate automatically with caseworkers and home finders upon Phase 3 implementation, these email addresses must be recorded.

2. Phase 2 enhanced and provided additional support for the search and match functionality. Three reports were released as part of this phase. For each resource, they combine and display the information collected during Phase 1.

3. Phase 3 added search and match functionality to provide a pool of appropriate placement options for children entering foster care or moving to a new placement. Additionally, workers can send referrals for desired resources and fully place the child within the Placement module.

4. Phase 4 will provide added functionality around reporting.
Module 2:  
Recording Placement-Related Child Options

The Child Characteristics, Special Restrictions, and Placement Evaluation sub-tabs on the Person List window were implemented during Phase 1 of the Placement module. Information recorded there carries over to the Child Characteristics, Special Restrictions, and Placement Evaluation windows that are accessible from the Placement window NAVIGATION PANE. It is recommended that workers record this information on the Person List window whenever possible, instead of the windows accessible from the Placement window.

The Characteristics - Child-Placement Sub-Tab

The Characteristics sub-tab on the Person List window is used to record and/or view characteristics of adults and children involved in a case. Selecting the “Child-Placement” category displays an updated list of placement-related characteristics from which to choose. Characteristics recorded here are used to match children with foster care resources that best meet their needs.

The Child Characteristics window allows you to view or modify the characteristics for the child(ren) who are the focus of a placement search. Characteristics should be recorded for each child, as applicable.

The Effective Date field can be used to search for characteristics that were effective on a specific date. (Upon recording characteristics, the effective date is the system date that changes are saved.)

Where am I?
My Workload tab (INV, FSI, FSS) > Person List link > select child > Characteristics sub-tab
The Special Restrictions Sub-Tab

The **Special Restrictions** sub-tab provides workers with the ability to record extraordinary placement needs that apply to a child. Restrictions selected here do not impact the pool of resources returned through a placement search. This window is used to alert workers of potential conflicts between children already living in the home and children needing placement.

The sub-tab contains a grid with the following elements:

- **Checkbox column** – Multi-select is available.

- **Special Placement Restrictions** column – The four restrictions seen in the image above display for selection. In the event of a Person Merge, active and end-dated restrictions follow the PID (Person ID) carried forward. Special restrictions may also be de-selected. Upon de-selecting the checkbox for a saved restriction for which comments exist, the following message displays with Yes and No buttons:

  "Unchecking this Special Restriction will result in the loss of the corresponding comment upon save. Continue?"

  - Clicking the No button closes the message and returns to the window with the checkbox still selected.
  - Clicking the Yes button closes the message and de-selects the checkbox. If recorded, any comments, along with the restriction, are end-dated (and inaccessible) once the window has been saved.

- **Comments** column – An indicator displays if comments are recorded for the associated restriction.

  The Comments field is optional and can hold up to 4000 characters. It is important to note that a Comments field exists for each individual restriction. For example, when you select multiple restrictions and then record comments, they pertain only to the restriction you selected last. Upon saving, this is reflected by a red checkmark in the Comments column for only that restriction.
The Placement Eval. (Evaluation) Sub-Tab

The Placement Eval. sub-tab allows for the entry of additional information with regard to a selected child in need of foster care placement services. The data recorded here is used to document and communicate detailed information about a child’s needs beyond what is captured for the purpose of resource matching. Workers can use this information to make more informed decisions when determining the best placement for a child. The data recorded here is informational only and has no bearing on the search and match process, nor does it replace any data collected for the children and families in the FSS stage, such as the Health Services and Education modules.

The evaluation grid is organized into five categories: General Information, Current Status of Child, Activities of Daily Living, Behavioral and Mental Health, and Medical and Developmental. Each category contains columns for the category title and questions, Yes/No radio buttons (or “N/A”), comments indicators, and Clear links. When comments are recorded in the Comments field, an indicator displays in the Comments column for the associated question/statement.
Module 3: 
Recording Placement-Related Resource Characteristics

Resource characteristics are accessible either as a tab when a foster care resource is selected on the Resource Search window, or as a NAVIGATION PANE link when a FAD stage is selected on the My Workload tab.

The Resource Characteristics window/tab allows users to record characteristics of each resource as they pertain to foster care placement. This window/tab collects characteristics of children that a resource is willing/able to care for, applicable Local Program Type(s), and the availability status of each bed in the home. Additionally, you can select the languages spoken in the home and indicate whether the home is a Close to Home resource or an ORRUAC (Office of Refugee Resettlement Unaccompanied Alien Children) resource, both of which will flag the resource as inapplicable in a multi-facility foster care placement search. Additionally, resources that are indicated as ORRUAC resources are flagged as inapplicable for an exact search.

You must have the RESOURCE ADMIN Business Function in order to access the Resource Characteristics window in modify mode. Specifically, the following rules apply:

- Upstate district workers can update Resource Characteristics without the Business Function from within a FAD stage on the workload using the NAVIGATION PANE link. However, they need the RESOURCE ADMIN Business Function to do so via a Resource Search.

- ACS and voluntary agency staff (across the state) need the RESOURCE ADMIN Business Function to update Resource Characteristics both via a Resource Search and within a FAD stage on the workload using the NAVIGATION PANE link.

![Resource Search](image)
Any Congregate Care or Regular Foster Care resource that has received or is in the process of receiving certification or approval to provide long- or short-term housing to children for the purpose of 24-hour care has access to the Resource Characteristics tab. These resources may include FAD resources that will not be used in the placement matching process.

For example, characteristics may be collected on an Approved Relative Home, but this home would never return in a multi-facility placement search. Alternatively, some resources do not have access to the Resource Characteristics tab, including non-FAD resources and Subsidized Housing. For example, Adoption Subsidy homes, although valid FAD resources, would not have access to Resource characteristics because they fall under the subsidized housing category.

The header contains the following fields and information:

- **Total Capacity** label – Total number of beds as recorded on the FAD license.
- **Available** label – Number of available beds as calculated upon opening the window.
- **Unavailable** label – Number of unavailable beds as calculated upon opening the window.
- **Close to Home Resource** checkbox – Used to designate whether this is a resource that is contracted through the Close to Home juvenile justice initiative in New York City. Selecting this checkbox prevents the resource from returning in a multi-facility placement search.
- **ORRUAC Resource** checkbox – Used to designate whether this is a resource that participates in the Office of Refugee Resettlement Unaccompanied Alien Children program. Selecting this checkbox prevents the resource from returning in a multi-facility placement search.
- **Resource Languages** field – Used to select the languages that are spoken in the home.
Directly under the header, two grids display: **Resource Characteristics** and **Local Program Types**.

**Resource Characteristics** grid – Used to select the characteristics of children for which the resource is willing and able to provide, or has an interest in providing, care. This grid corresponds directly to the **Child Characteristics** grid, which is used to record and/or view characteristics of children involved in INV, FSI, and FSS stage.

**Local Program Types** grid – Used to select county-specific program types provided by the resource that are not part of the licensing process. It is understood that these program types are not connected to payment or licensing requirements in any way.

**Did you know?**

When accessing the **Resource Characteristics** window from a ‘Regular’ foster home, the **Resource Characteristics** and **Local Program Types** grids are used to display and collect these elements at the resource level. When accessing the window from a Congregate Care resource, these grids are used to search for the selected attributes. The **Add or Remove Resource Char/Local Program Types** link on the **Resource Search** window is used to collect these attributes at the bed level.
Below the **Resource Characteristics** and **Local Program Types** grids are the **Bed Detail** section and **Comments** field:

- **Bed Detail** section – Displays a list of all beds for which the resource is licensed and indicates whether each bed is available or unavailable. For congregate care resources, a **Detail** link displays for each bed listed. Clicking it displays any resource characteristics or local program types assigned to that specific bed.

- **Comments** field – This field allows you to record or view narrative information about the resource. It holds a maximum of 4000 characters.

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**Did you know?**
The **Bed Detail** section is used for designating the short-term unavailability of a bed (e.g., the room is being used for a college student home for summer, having new carpet or windows installed, etc.). This does NOT affect a search return for that home. That bed still shows as a "Vacancy in Activities." Only licensed capacity minus the number of children placed in that home via Activities affect the search return.

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Marking a bed as "Unavailable" does not prevent a home from returning in a search. The **Unavailable** radio button in the **Bed Detail** section of the **Resource Characteristics** window is intended for short term unavailability such as when a room is being remodeled or the foster family has a child home from college for the summer. Marking a bed as unavailable for the planned placement of an unborn sibling MAY be an appropriate use of this feature, depending on the situation, but the home would still return in a search because Activities would not show the bed as being occupied.
Resource Summary Report

The Resource Summary Report allows you to view current and historical resource information that is recorded on the Resource Characteristics window/tab. The report is generated by accessing the Resource Characteristics window/tab and clicking the Resource Summary Report link in the NAVIGATION PANE.

Did you know?

The fully certified or approved foster parent(s) must complete the OCFS-5183I - Resource Characteristics. The OCFS-5183I is a form that includes a list of characteristics of children who may need foster care/adoption placement. Each family must complete one by checking "yes" or "no" by each child characteristic that the family is willing and able to accommodate.
Module 4:
Maintaining Staff Contact Information

Recording Your Business Email Address

The Email tab is used to collect business email addresses of CONNECTIONS users. Recording your email address on this tab allows CONNECTIONS to send you automatic email notifications. Workers are able to update only their own email address. Security Coordinators can maintain email addresses for users within their own district/agency.

There can only be one email address domain used per agency. It is only possible to have the domain in CONNECTIONS changed if it is changed for all the agency’s users.

For district and agency staff, the Email (Local Part) field is required and holds up to 75 characters. It does not allow spaces, commas, or symbols. Workers can use this field to record the Local Part of their email address, which consists of the information before the “@” symbol.

Did you know?
The same email address can be recorded for each person in a group as long as the domain is the one used by all members of your agency.

Recording Your Business Phone Number

All active CONNECTIONS users can update contact information for themselves in the Address and/or Phone tab. Recording a valid phone number can be useful for contacting resource referrals.

Step-by-Step: Recording Your Business Phone Number

1. From the Search/Maintain drop-down menu, select the “Staff/Security” option. The Staff Search window displays.
2. Enter your First and Last name in the Staff Search Criteria fields.
3. Click the Search button.
4. Select your record from the Staff List grid.
5. Click the Phone tab.
6. Record phone number information in the applicable fields.
7. Click the Add button. The phone number displays in the grid.
8. Click the Save & Close button.
Assigning Placement-Related Email Notifications

The Notifications tab is used to select which placement-related notifications a staff member receives. Only those in the worker’s district/agency with the MAINT SECURITY Business Function can modify this tab (most often the Security Coordinator). Only staff with a business email address recorded on the Email tab can receive email notifications. The following notifications are available:

- New placement request
- Referral sent
- Referral received
- Placement request closed
- Child(ren) placed
- New resource created
- Resource modified
- Placement verification required
- Activities data entry required

Emails based on the notification list are sent from “ocfs.sm.connections.notifications@ocfs.ny.gov” and contain the following disclaimer:

“This communication, together with any attachments hereto or links contained herein, is for the sole use of the intended recipient(s) and may contain information that is confidential, privileged, or legally protected, and as such is not a public document. If you are not the intended recipient, you are hereby notified that any review, disclosure, copying, dissemination, distribution or use of this communication is STRICTLY PROHIBITED. If you have received this communication in error, please contact your CONNECTIONS Security Coordinator and delete the original and all copies of the communication, along with any attachments hereto or links herein, from your system.”
Module 5:
Placement Business Functions

A district/agency’s Security Coordinator assigns Business Functions to workers according to their responsibilities in CONNECTIONS. For example, to record progress notes, a worker requires the ENTER PROG (Progress) NOTE Business Function. Business Functions vary between districts and agencies based on job responsibilities in CONNECTIONS.

For Phase 3, new Business Functions were added that control access to the different windows within the Placement module. The ability to view a request for placement services, create a new request, or edit an existing request is granted via stage role or Business Function.

ASSIGN PLACE Permits modification of the Placement Worker Assigned field in order to direct a placement request to a specific worker.

INITIATE PLACE Permits initiation of new placement requests through the specialty path (i.e., the Case/Stage Search window). Workers without this Business Function, but with workload access to a stage, can initiate a placement request using the Placement link of the My Workload tab.

MAINT PLACE Permits access to the Placement and Placement Dashboard windows. Workers with this Business Function can initiate new requests for placement and modify placement-related information for children and resources including Search Type, Facility Setting, Program Type, Placement Evaluation, and Priority Criteria.

SEARCH PLACE Permits access to conduct Resource Searches, create referrals, and place children.

RESOURCE COORD In combination with the PLACE DASH Business Function, permits the ability to view and respond to open placement referrals on the Placement Dashboard window.

RESOURCE ADMIN Permits the modification of placement-related resource characteristics.

PLACE DASH Provides read-only access to all Placement-related windows from the Placement Dashboard window.

If you have questions about your security and ability to access specific Placement-related windows, please follow up with your supervisor.
Module 6:  
The Placement Window

The Placement window serves as a central location for child-specific information related to placement needs at the time of a placement request. This window is intended to assist workers in making decisions about placements for children. It is most valuable for those who work with children in foster care and children entering placement, and their supervisors.

Accessing the Placement Window

Placement requests are initiated on the Placement window, which can be accessed:

- via the Placement link in the NAVIGATION PANE when an Investigation (INV), Family Services Intake (FSI), or Family Services (FSS) stage (with a stage type of Child Welfare Services [CWS] or Child Case Record [CCR]) is selected on the workload;
- OR—
- via the Case/Stage Search window with the MAINT (Maintain) PLACE or INITIATE PLACE Business Function, also known as the ‘specialty path.’

A placement request is available and modifiable from the stage for which it was created, as well as from other stages in the same case within a district and associated CCR stages (when children in common exist).

In addition, any worker who has access to a stage through Unit Hierarchy can initiate a placement request. For example, your supervisor could begin a request by accessing your workload using the Search Other Units/Workloads function.

Exploring the Window

Upon accessing the window from the My Workload tab or specialty path, the Placement window has a layout similar to most CONNECTIONS windows. It features a title bar, left-hand NAVIGATION PANE, work area, and a legend at the bottom of the window.

The New button creates a new blank placement request. The ‘New Using’ function in CONNECTIONS prefills data fields from previous records. If there are no previous requests to prefill from, the New Using button is disabled.
The Requests for Placement Services grid displays all placement requests created for children in the specific stage and case. This includes placement requests created by historical workers. The Requests for Placement Services grid is expanded by default. When there is a single request available, it is automatically selected. If there are multiple requests, none are selected. Requests display in the grid for 60 days, after which time the request expires and no longer displays in the grid.

The NAVIGATION PANE Links

- **Options section**
  - Requests containing only end-dated children/Requests containing end-dated and active children
    Clicking this link filters the requests that display in the grid. When the grid displays requests for only end-dated children, this window is read-only.

- **Child Options section**
  - Child Characteristics
    Displays the Child Characteristics window on which a worker views or modifies characteristics for the child(ren) who are the focus of the placement search (implemented in Phase 1).
  - Prior Placements - Child
    Displays the Prior Placements - Child window containing read-only prior foster care placement information (implemented in Phase 2).
  - Placement Evaluation
    Displays the Placement Evaluation window with an evaluation tool for workers that provides more detail and flexibility in recording relevant information about a child (implemented in Phase 2).
  - Special Restrictions
    Displays the Special Restrictions window with placement-related extraordinary needs for the child.

- **Placement Options section**
  - Priority Criteria
    Displays the Priority Criteria window with all characteristics recorded for the child(ren).
  - Placement Search
    Displays the Placement Resource Search Results window. This link enables when the Request Status has been changed to “Ready for Search.”
  - Referral Detail
    Displays the Referral Detail window where district and agency workers may view and maintain placement referrals.
Child Options
Links in this section are used to record and view information specific to the child and his/her placement.

The Child Characteristics Window
The Child Characteristics window allows you to view or modify the characteristics for the child(ren) who are the focus of a placement search. The MAINT PLACE Business Function is required to update Child Characteristics through the Placement/Placement Dashboard window. Though not required in CONNECTIONS, many districts/agencies require the review/completion of this window in the request process. You should follow up with your supervisor for the protocol of your district/agency.

Did you know?
While a placement request is open, changes can be made only to the child’s characteristics (and other Child Options such as Placement Evaluation and Special Restrictions) on this window (via the Placement or Placement Dashboard windows), not on the Child Characteristics sub-tab of the Person List window. However, changes you make here carry over to the sub-tab.
The Prior Placements - Child Window

This read-only window displays prior foster care placement information for the selected child as recorded on the Activities window. The following activities may display:

- 1010 - Tracking Start Date
- M910 - Child Placed
- M950 - Child Begins Absence
- M960 - Child Ends Absence
- M970 - Child on Trial Discharge
- M980 - Child Returned from Trial Discharge
- M981 - Intra-Agency Transfer - New Facility
- M982 - Inter-Agency Transfer - New Agency
- M990 - Child Discharged from Foster Care Program
- M999 - Child’s Track Closed

The Prior Placements - Child window displays a grid listing only the children selected for placement in the placement request. Upon selecting a child from the grid, the Client Identification Number (CIN) associated to the selected child is used to determine if activity records exist. Selecting a record displays the detail fields below. If no records exist, “No match found for the criteria entered“ displays.
The Placement Evaluation Window

The *Placement Evaluation* window provides for the entry of additional data for the children in need of foster care placement services. However, the information recorded here is not used in the search and match process. Some districts/agencies request that the worker record Placement Evaluation information during the placement request. However, it can be completed on the *Placement Dashboard* window, which is where ACS CPS supervisors complete it.

The Special Restrictions Window

The *Special Restrictions* window displays extraordinary placement needs that apply to a child. The information on this window alerts you to any potential conflicts that may exist between the child needing placement and other children already living in a home. Note, however, that this does not restrict the available resources returned during the search and match process.
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Placement Options
Links in this section are primarily used during the search and match process for a request. However, in order to complete a placement search, the Priority Criteria window must be complete.

The Priority Criteria Window
The Priority Criteria window is used to designate which characteristics recorded for a child are required in the search parameters and which are optional. Completion of the Priority Criteria window is not required in order to initiate a placement request. Once you have finished, select the Priority Criteria Complete checkbox. This prevents you from selecting additional characteristics; however, you can deselect the checkbox if you want to make additional selections.
Using radio buttons, for each child in need of placement in the associated case/stage, workers may select whether a characteristic is required or optional in the placement search. Only one radio button may be selected for a characteristic; the **Required** and **Optional** radio buttons cannot both be selected for the same characteristic.

Each placement request has its own priority criteria record, allowing workers to view the information as it was when the request was opened. Only children who are part of the request are included on this window; children who are in the case but not the request do not display.

Once you have completed the window, you must select the **Priority Criteria Complete** checkbox at the bottom of the window. This is required in order to conduct a placement search. Once you select this checkbox, no further selections can be made on the window; however, you may deselect the checkbox if you need to make changes.
The Referral Detail Window

The Referral Detail window allows workers to view or maintain placement referrals received by the district or voluntary agency. Workers who are employed at the placing agency can maintain placement referrals if they have the SEARCH PLACE Business Function. Otherwise, workers need the RESOURCE COORD (Coordinator) Business Function to maintain referrals.
The Placement Window Work Area

Upon opening the Placement window, the work area displays a grid labeled Requests for Placement Services. This grid displays all placement requests created for children in the specific stage and case. This includes placement requests created by a prior worker (known as a 'historical worker'). The Requests for Placement Services grid is expanded by default. When there is a single request in the grid, it is automatically selected. If there are multiple requests, none are selected.

The Requests for Placement Services grid can be sorted and filtered like other grids in CONNECTIONS. It contains the following columns:

- Request ID - A system-generated number in CONNECTIONS generated once a request is initiated.
- Stage Name - Name of the stage for which the request was created.
- Originating Stage ID - ID number of the stage for which the request was created.
- Stage - Category of the stage from which the request was created (e.g., INV, FSI, FSS).
- Stage Type - Type of stage from which the request was created (e.g., INI, CWS, CCR).
- Creation Date - System-generated date that the request was created (with timestamp).
- Requested Placement Date - Date the requested services are needed.
- Initiated By - Name of the worker who initiated the request.
- Request Status - Status of the request (i.e., In Process, Ready for Search, Searched, Referred, or Return to LDSS).
- Created By - District/agency ID of the worker who initiated the request.
- Worker Assigned - Name of the placement worker designated by the district/agency.
- Responses - The number of responses received for the referral.
- Closed Date - Date the placement request was closed or withdrawn.
- Outcome Status - Populated from the Placement Action field on the Place Child window (e.g., Place, Waitlist, No Suitable Placement Found, Return to District for Agency Transfer, Placement No Longer Needed).
- Placement Resource - Populated from the Resource Name field on the Place Child window.
- Placing Agency - District/Agency that is responsible for searching for resources.
Maintaining Placement Request Details

In the Placement Request Details section, the Children Needing Placement grid displays. Children listed in the grid display in alphabetical order. The multi-select tool is available to initiate a sibling placement request.

The Request Status drop-down field displays the status of the request. The following statuses are available for selection:

- In-Process
- Ready for Search
- Withdrawn

In addition, these system-generated statuses may display:

- Searched - The status after clicking the Placement Search link.
- Return to LDSS - The status after saving a placement action of “Return to LDSS.”
- Referred - The status after clicking the Refer for Placement button on the Placement Resource Search Results window.
- Closed - The status after clicking the Close Request button on the Placement Resource Search Results window.

If the Request Status changed to withdrawn, workers are required to record the reason.
The **Placement Worker Assigned** field is available to direct the placement request to a specific worker. Workers with a role in the stage, or with the MAINT PLACE or INITIATE PLACE Business Functions, may be selected from the list.

![Placement Worker Assigned field](image)

**Recording Critical Address Information**

The **Critical Address Information** section stores address information for a request, not a specific child. The section is comprised of **Proximity Address** and **School Address** sub-sections.

![Critical Address Information section](image)

When entering addresses in the **Critical Address Information** section, the entered addresses must be validated.
Recording Resource Search Parameters

The Resource Search Parameters section is used to narrow the pool of resources when considering placement options. All fields in this section are modifiable when the request status is “In-Process” or for workers who have a specific Business Function. CONNECTIONS does not require you to make selections in these grids in order to save the request. However, Program Types and Local Program Types are required resource search elements.

The Search Type field allows you to choose the type of search to perform:

- A “Multi-Facility” search compares the criteria in the request to the services provided at the available resources and returns the most likely resources. When this Search Type is selected, “Foster Home” or “Congregate” must be selected in the Setting field.
- An “Exact” search allows you to search for a specific known resource when it has been determined as the most appropriate resource.

The optional Religion field allows you to give preference to the child(ren)’s religion when considering placement resources. The Language field is used to match the preferred language for a request to the languages spoken in the available resource(s). Language is considered a ‘Required’ factor in the matching process; however, it should only be used when there is a special requirement to match on the foster home’s languages spoken. This search parameter is most useful if you are searching for a home speaking a language other than English.

The Program Types grid is used to identify which OCFS (Office of Children and Family Services) programs are required for this request. Program Types are defined by OCFS and authorizing agencies; they are not based solely on the characteristics of children currently living in the home. The Program Type selected must correspond with the selected Setting. This information is recorded for a foster care resource on the Home License window.

The Local Program Types grid is used to identify which county-specific program types are required for this request. Local Program Types are recorded on the Resource Characteristics tab by the resource coordinator.

Selecting multiple Program Types and Local Program Types that conflict with one another will result in limited or no search results.
A Comments field displays below the Program Types and Local Program Types grids for recording shared comments by all workers involved in the request throughout the request process. A worker can document request-related facts for their own use or for use by the next worker. This field is modifiable until the window is saved, after which a time stamp displays. It is not required in CONNECTIONS to record comments.

Placing the Request on the Dashboard

The Placement Dashboard window is a central location used to complete the placement search and referral process. Selecting and saving the Place(d) on Dashboard checkbox below the Comments field make the request visible on the Placement Dashboard window.

Once the checkbox is selected and saved, you cannot modify it. Edits can still be made to the placement request; however, you cannot remove the request from the dashboard.

When a placement request is saved for the first time, an email is sent to users from the district making the request who have the “New placement request” notification selected.

Email Notifications can be selected on the Staff/Security window. See Page 11 of this job aid for more information.
Module 7: The Placement Dashboard Window

The Placement Dashboard window is very similar to the Placement window with the standard title bar, NAVIGATION PANE, and work area. Notice that there is an additional Search All Placement Requests section. From here workers can search by district, agency, or case.

Access to the Placement Dashboard window requires the PLACE DASH Business Function. Workers with this Business Function can view all placement requests for the worker’s district or voluntary agency. Additional Business Functions are required to maintain placement requests in the Placement Dashboard window.

Accessing the Placement Dashboard Window

The Placement Dashboard window is accessed via the Search/Maintain menu on the main CONNECTIONS window using the “Placement” link.

Exploring the Window

The Placement Dashboard window displays many of the same components as the Placement window.

This grid displays all active (i.e., the Place(d) on Dashboard checkbox has been selected) placement requests for children in the district/agency of the logged-on worker. In addition, agency workers can see all open placement requests referred to the agency and those requests that are in “Place “or “Waitlist” status.

Clicking the View Recent link displays placement requests from within the last 30 days (including closed requests).
The NAVIGATION PANE Links

- **Options section**
  - **View Recent**
    Filters the requests that display in the grid. The grid displays ended and closed requests for children; this window is read-only.
  - **Verify Placements**
    Displays the Verify Placements window on which a worker confirms that the child(ren) did or did not arrive at the destination resource. Refer to Module 9 (Placing a Child and Verifying Placement) of this Job Aid for more information.
  - **Placement Resource Roster**
    Displays the Placement Resource Roster window with a view-only list of children placed in a selected resource, with a selected agency, or within a selected district, along with their associated characteristics.
  - **Resource Availability**
    Displays the Resource Availability window with details about resources with active contracts that have vacancies for foster care placement.

- **Child Options section**
  - **Child Characteristics**
    Displays the Child Characteristics window on which a worker records characteristics for the child(ren) (implemented in Phase 1).
    **NOTE:** Child characteristics are modifiable until a placement search is initiated.
  - **Prior Placements - Child**
    Displays the Prior Placement - Child window with a list of movement codes recorded on the Activities window (implemented in Phase 2).
  - **Placement Evaluation**
    Displays the Placement Evaluation window with an evaluation tool for workers that provides more detail and flexibility in recording relevant information about a child (implemented in Phase 2).
  - **Special Restrictions**
    Displays the Special Restrictions window with any placement-related extraordinary needs that apply to a child.

- **Placement Options section**
  - **Priority Criteria**
    Displays the Priority Criteria window with all characteristics recorded for the child(ren).
  - **Placement Search**
    Displays the Placement Resource Search Results window. This link enables when the Request Status has been changed to “Ready for Search.”
  - **Referral Detail**
    Displays the Referral Detail window where district and agency workers may view and maintain placement referrals.
Placement Dashboard Options

The Placement Resource Roster Window

The Placement Resource Roster window displays a view-only list of children placed in a selected resource, with a selected agency, or within a selected district, along with their associated characteristics. You can filter and sort by any column. With the exception of child characteristic sorting, any filters you apply carry over to the printed report.

The information that displays is based on state, regional, district, or voluntary agency job function. The PLACE DASH Business Function is required to access this window.

Accessing the Window

The Placement Resource Roster window is accessible via the Placement Resource Roster link in the NAVIGATION PANE of the Placement Dashboard window.

Exploring the Window

The roster grid contains columns for the child’s name, age, sex, a special restrictions indicator, PID, county code of the stage, agency name, resource name, placement date, and characteristics.

When special restrictions have been recorded for a child, a checkmark displays in the Special Restrictions column of the roster grid. Selecting the child from the grid enables the Special Restrictions link in the NAVIGATION PANE.

Did you know?

Data displayed in this report is populated from the Characteristics and Special Restrictions sub-tabs and windows. See pages 2 and 3, respectively, for more information on these sub-tabs.
The Resource Availability Window

The Resource Availability window allows workers to view details about resources that have vacancies for foster care placement. The information displayed may be filtered and sorted to create a customized report, which then may be printed for offline access to vacancy information.

District workers with the necessary security may view vacancies for resources that have an active contract to provide foster care services. Voluntary agency workers with the necessary security may view vacancies for resources licensed by the voluntary agency. The PLACE DASH Business Function is required to access this window.

Accessing the Window

The Resource Availability window is accessible via the Resource Availability link in the NAVIGATION PANE of the Placement Dashboard window.

Exploring the Window

The Resource Availability window is organized into various sections. The Current Overall Resource Status section displays the following:

- **Current Number of Active Resources** - the number of resources with “Accepted-Active” status and a setting of “Foster Care” or “Congregate Care”
- **Total Licensed Capacity** - the sum of the licensed capacity for the current active resources
- **Total Availability** - the total licensed capacity minus the sum of the children currently placed in foster care (excluding overcapacity)

The work area displays prefilled Resource Availability based on the worker (district/voluntary agency) accessing the window.

Did you know?
Some of the data displayed in this report is populated from the Resource Characteristics window that was implemented in Phase 1.
Resources can be searched in CONNECTIONS by completing the fields in the **Resource Availability Search Criteria** section on the **Resource Availability window**.

Selecting the **Resource Availability Report** link in the **NAVIGATION PANE** generates a report of the selected resource(s) (as seen in the example below).
Upon initiating a placement search, CONNECTIONS matches the recorded child characteristics to the recorded characteristics of resources with vacancies. The Placement Resource Search Results window opens automatically with the results that match the search criteria.

Before the Placement Search: Updating the Request Status

Before you can initiate a placement search, the status of the request must be changed to “Ready for Search.” This enables the Placement Search link. The MAINT PLACE Business Function is required to update the request status.

Step-by-Step: Updating the Request Status

1. In the Placement Request Details section of the Placement Dashboard window, click the drop-down arrow for the Request Status field. “In-Process,” “Ready for Search,” and “Withdrawn” display.
3. Click the Save button.

Conducting the Placement Search

Upon clicking the Placement Search link, CONNECTIONS looks for resources that meet certain criteria. Specifically, that a resource has:

- a status of “Accepted – Active.”
- the Program Type(s) and Local Program Type(s) that match those selected for the search.
- the required number of open beds that can accept the specified gender and age range(s).
- all of the ‘Required’ characteristics.
- a language designation that matches the language of the child(ren).

Viewing Search Results

When the search is complete, the Placement Resource Search Results window displays with results that match the search criteria. CONNECTIONS first chooses those resources that meet the required search parameters and orders the results by those whose characteristics are most closely aligned with the optional criteria selected and then by which agency is next in line to receive a referral.
The Resource Search List Grid

The Resource Search List grid displays the resources that match the search criteria. The columns contain specific information about each resource:

- Checkbox column - Multi-select is available.
- Resource Name - The name of the resource.
- VID - The Vendor ID number of the resource.
- Resource ID - The Resource ID number of the resource.
- D/V - The agency type of the resource (“D” for District or “V” for Voluntary).
- Prior Placements - Displays a “Y” if the resource has prior foster care involvement for one or more of the children in the request. This field is otherwise blank.
- Vacancies in Placement - The number of available vacancies for the resource as equal to the resource’s capacity (from the FAD license) minus the number of children placed at the resource (based on Placement and Activities data).
- Vacancies in Activities - The number of available vacancies for the resource as equal to the resource’s capacity (from the FAD license) minus the number of children currently placed in foster care with a Child Status of “in 24-hour care,” “Absent,” or “Trial Discharge” (based on Activities data).
- Matching Optional Criteria - The number of Resource Characteristics that match the characteristics identified as “Optional” on the Priority Criteria window.
- Distance from Proximity Address - The number of miles between the resource and the proximity address recorded. If the Address Not Available checkbox is selected in the Proximity Address section or the latitude/longitude for either is not available, “N/A” displays.
- Distance from School Address - The number of miles between the resource and the school address recorded. If the child is not enrolled in school or the Address Not Available checkbox is selected in the School Address section, “N/A” displays.
- Accepted Status in other referrals - Displays a “Y” if the resource has one or more referrals in “Accepted” status for other open requests.
- Agency ID - The Agency ID number of the district/agency through which the resource is contracted.
- Religion - Displays a “Y” when a religion recorded for the request matches the religion recorded for the resource.
- County - Displays the county in which the resource is located.

Upon selecting a resource in the grid, the resource detail tabs display with information about the resource.
Using the NAVIGATION PANE Links

Options
Using the Options section link, you can toggle between two views of the search results:

- **View Local Vacancies**
  This is the default view of the grid; this link only displays when the grid is in View All mode. This view displays only those resources that match the search criteria and have vacancies in placement greater than or equal to the number of children selected for placement in the Children Needing Placement grid for this request and are located in the county that created the placement request.

- **View All**
  This link displays when the grid is in View Local Vacancies mode, which is the default. This view displays resources that match the search parameters but do not have sufficient vacancies in placement or whose resource county is outside the county that created the placement request.

Child Options
The Child Options section contains the Matching Factors - Child link. Clicking this link displays the Matching Factors - Child window, on which you can compare the characteristics of the selected resource to the characteristics recorded for each child in the request.

Resource Options
The Resource Options section contains links that provide you with home licensing information and the Person List for the foster/adoptive home.

- **Licensing Information** - Displays the Home License window for the resource.
- **FA Person List** - Displays the Person List window for the FAD stage.
- **Matching Factors - Resource** - Displays the Matching Factors - Resource window, on which you can compare the combined characteristics of the child(ren) in the request to the characteristics of up to three selected resources.
- **Prior Placements - Resource** - Displays the Prior Placements - Resource window, on which you can view all prior placements for the child at the selected resource (as recorded on the Activities window). If none exist, the link is disabled.
- **Placement Resource Roster** - Displays the Placement Resource Roster window, on which you can view a list of children placed at the selected resource.
Viewing the Matching Factors

The read-only Matching Factors windows allow you to compare characteristics recorded for children in the request to characteristics recorded for certain resources.

The Matching Factors - Child window pertains to the resource selected in the search results. It indicates the characteristics that apply to the resource and those that apply to each child in the request.

The Matching Factors - Resource window indicates the characteristics that apply to the resource(s) and those that apply—combined—to the child(ren) in the request. You can select up to three resources in the search results.
Viewing the Child(ren)’s Prior Placements at the Resource

This view-only window displays all prior placements for the selected child at a specific resource as recorded on the Activities window. The following activities may display:

- M910 - Child Placed
- M950 - Child Begins Absence
- M960 - Child Ends Absence
- M970 - Child on Trial Discharge
- M980 - Child Returned from Trial Discharge
- M981 - Intra-Agency Transfer - New Facility
- M982 - Inter-Agency Transfer - New Agency

Accessing the Window

There are three paths to access the Prior Placements - Resource window:

- via the Placement Resource Search Results window
- via the Referral Detail window
- via the specialty path for workers with the MAINT PLACE or INITIATE PLACE Business Function

Exploring the Window

The Prior Placements - Resource window displays a grid listing all children in the associated case/stage. Upon selecting a child from the grid, workers conduct a Resource Search to locate the specific resource. If there is prior placement activity for the child at that resource, the Prior Placement Activity section displays the details as recorded on the Activities window.
Closing a Request or Referring for Placement

After reviewing the search results, a decision must be made to close the request or refer for placement.

If the search did not provide any suitable results, you may decide to close the request. When closing a request, you must record a placement action on the Place Child window (e.g., “No Suitable Placement Found,” “Placement No longer Needed”).

A Comments field is available for additional explanation. If this is not recorded, you will receive an error message upon clicking the Close Request button below the grid. Acknowledging the message automatically opens the Place Child window.

If you decide to refer for placement, there is no limit on the number of referrals that can be sent as long as the referrals are sent in blocks of no more than 10 at one time. Every district/agency should determine how many resources should be explored before sending referrals.

Upon clicking the Refer for Placement button, a message displays with a list of agencies to which you are about to send referrals.

Email notifications are generated when notifications have been selected for “Placement request closed” and/or “Placement referral received.”
Module 9: 
Placing a Child and Verifying Placement

The staff member who reviews placement requests may be a home finder, Office of Placement Administration (OPA) staff, or a supervisor of either. It is important to follow the protocol of your district/agency. Staff employed at the placing agency can maintain referrals with the SEARCH PLACE Business Function; otherwise the RESOURCE COORD (Coordinator) Business Function is required.

Workers who have been assigned the proper notification(s) by their Security Coordinator (or designated staff member with the MAINT SECURITY Business Function) receive an email notification each time a placement request is received.

The Referral Detail Window

Placing agency workers who receive referrals use the Referral Detail window to respond to a referral for their district/agency’s resource.

Accessing the Referral Detail Window

The Referral Detail window is accessed by clicking the Referral Detail link in the NAVIGATION PANE of the Placement Dashboard window.

Workers at the referring district/agency can use this window to manage referral responses. They can view all referrals sent for the specific placement request. These workers have access to Referral Detail via the Placement window in addition to the Placement Dashboard window.
Exploring the Window

The Referral Detail window contains the features standard to most CONNECTIONS windows (i.e., title bar, NAVIGATION PANE, work area, and legend). The Referral Detail grid is sorted in descending order by Referral Sent Date and Resource Name. The grid contains the following columns:

- Checkbox column - Multi-select is available.
- New - Displays a red “Y” for records that have not been saved by the resource agency. Once a decision has been saved, the “Y” no longer displays.
- Resource Name - The name of the resource.
- Referral Sent Date - The date/time the referral was sent to the receiving agency.
- Response Sent Date - The date/time the agency sent a referral response.
- Referral Status - Displays “Accepted” or “Declined” once a decision has been saved.
- Resource Contact - The name of the worker who last saved the referral response detail record.
- Contact Work Phone - The active primary business phone number associated to the Resource Contact.
- Accepted status in other referrals - Displays a “Y” when one or more referrals in “Accepted” status exist in other open placement requests for the resource.
- County - The physical county of the resource.
- Agency ID - The agency ID of the resource.
- Prior Placements - Displays a “Y” when the resource has prior foster care involvement for one or more children in the request (based on Activities movement records).
- Date Last Update - The date the record was last modified (inclusive of a system modification).
Making a Referral Decision

There are many tools that placing agencies can use to make a referral decision. These are accessible in the NAVIGATION PANE.

Child Options

The Child Options section contains the Matching Factors - Child link. Clicking this link displays the Matching Factors - Child window, on which you can compare the characteristics of the selected resource to the characteristics recorded for each child in the request. (See pages 26 and 27 for more information.)

Resource Options

The Resource Options section contains links that provide you with home licensing information and the Person List for the foster/adoptive home.

- Licensing Information - Displays the Home License window for the resource.
- FA Person List - Displays the Person List window for the FAD stage.
- Matching Factors - Resource - Displays the Matching Factors - Resource window, on which you can compare the combined characteristics of the child(ren) in the request to the characteristics of up to three selected resources. (See pages 26 and 27 for more information.)
- Prior Placements - Resource - Displays the Prior Placements - Resource window, on which you can view all prior placements for the child at the selected resource (as recorded on the Activities window). If none exist, the link is disabled. (See page 26 for more information.)
- Resource Characteristics - Displays the Resource Characteristics window where you can view the characteristics of the resource as they pertain to foster care placement. (See pages 5, 6, 7, and 8 for more information.)
- Placement Resource Roster - Displays the Placement Resource Roster window, on which you can view a list of children placed at the selected resource. (See page 28 for more information.)

Placement Options

- Place Child - Displays the Place Child window, on which you record the placement action for accepted referrals.
- Remove Referral - Removes the referral from the Referral Detail grid and generates an email to the referring agency.

Accepting a Referral

The districts/agencies responding to a referral make a decision to accept or decline the referral. Accepting a placement request does not mean that the child will be placed with the resource, only that the district/agency will discuss the placement option.

A referral is accepted by selecting “Accepted” in the Referral Status field. Doing so displays an Agency Requests grid where the placing agency can request to interview the child(ren) and/or receive additional supporting documentation.
Declining a Referral

When a referral is declined (by selecting “Declined” in the Referral Status field), the placing agency must make a selection in the Reason field. Supporting comments can also be recorded, but are not required.

![Declining a Referral](image)

Recording a Placement Action

The Place Child window is used to record the placement action for the child(ren) in the request, even if that action is not to place the child. This window is accessed by clicking the Place Child link in the NAVIGATION PANE on the Referral Detail window. It automatically displays upon clicking the Close Request button on the Placement Resource Search Results window.

![Recording a Placement Action](image)
In the work area of the *Place Child* window, the child list grid displays the child(ren) included in the request. They are sorted in ascending order by name, then PID. Below the grid, several fields display including *Placement Action*. This is where you record the placement action. The following options are available: Place, Waitlist, No Suitable Placement Found, and Placement No Longer Needed.

**Placing a Child**

Upon selecting “Place” in the *Placement Action* field, the *Placement Date*, *Best Fit Reason*, and *Resource Name* fields are required. Additionally, a grid displays where you must record the Activities Placement Type and, if applicable, a reason for placing the child out of county.

**Out of County Reason Field Codes**

(Note: This field is optional.)

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>01-CLINICAL REASON</td>
</tr>
<tr>
<td>02</td>
<td>02-VICINITY</td>
</tr>
<tr>
<td>03</td>
<td>03-JUDGE’S ORDER</td>
</tr>
<tr>
<td>04</td>
<td>04-OTHER DIST PLCMT</td>
</tr>
<tr>
<td>05</td>
<td>05-NO PGM IN CO/BOR</td>
</tr>
<tr>
<td>06</td>
<td>06-NO VAC IN CO/BOR</td>
</tr>
<tr>
<td>07</td>
<td>07-REJD BY LOC PGM</td>
</tr>
<tr>
<td>08</td>
<td>08-PARENTS NOT IN CO</td>
</tr>
<tr>
<td>09</td>
<td>09-ADOPTION PLCMT</td>
</tr>
<tr>
<td>10</td>
<td>10-FOSTER FAM MOVED</td>
</tr>
<tr>
<td>11</td>
<td>CTH AC BEGIN/FC CNTD</td>
</tr>
<tr>
<td>12</td>
<td>CTH RETURN CTH RES</td>
</tr>
<tr>
<td>88</td>
<td>OTHER</td>
</tr>
<tr>
<td>99</td>
<td>UNKNOWN</td>
</tr>
</tbody>
</table>

*Email notifications are generated when notifications have been selected for “Children placed.”*

“Accepted” must be selected in the *Referral Status* field before “Place” can be selected.
Verifying Placement in CONNECTIONS

After placing a child via the Placement module, workers use the **Verify Placements** window to confirm that the child(ren) did or did not arrive at the destination resource. This is the final step in the placement process.

This window is accessed by clicking the **Verify Placements** link in the **NAVIGATION PANE** of the Placement Dashboard window.

![Verify Placements Window](image)

The **Verify Placements** window should not be completed until 24 hours after the child is placed. This is to ensure that the child spent the night at the resource.

This window provides a view of all individual children recently placed by or at a specific district or agency. The **Children recently placed** section allows you to search for children placed within a 30-day period. Below the date fields, a child grid displays with the following columns:

- Child Name
- PID
- Placement Date - The child’s placement date (from the Place Child window).
- Verification Status - The placement verification status selected in the **Verification Status** field below the grid.
- Actual Placement Date - The date of placement as recorded in the **Actual Placement Date** field below the grid.
- Request Closed Date - The Closed Date for the request.
- Activities Result - The status from the Place Child window.
- Resource Name - The name of the resource (from the Place Child window).
- Agency ID - The Agency ID of the resource (from the Place Child window).
- Stage ID - The Stage ID for the placement request (from the Placement window).
- Case ID - The Case ID for the placement request (from the Placement window).
- Placement Request ID - The Placement Request ID (from the Placement window).
- Placement Action - The Placement Action for the request (from the Place Child window).
Upon selecting a child in the grid, the Placement Detail section displays with the child’s name and PID, the name of the resource, and the date of placement. A Verification Status field also displays, where workers select either “Placement Verified” or “Child Failed to Arrive.”

Once a placement is verified and saved, the Pending section of the Activities window is updated with a red checkmark, indicating that the placement has been verified.
Module 10: Resources

HELPFUL INFO Tab in CONNECTIONS
The HELPFUL INFO tab contains a filterable grid featuring CONNECTIONS Tip Sheets, Job Aids, and other valuable documentation. By default, the documents are organized first by area, then by document type, then by document description. A document can be opened by clicking the Navigate link associated with it. Filter rows can be used to quickly locate specific documents or sets of documents.

OCFS CONNECTIONS Internet Site
Many resources are available for you on the Step-by-Step/Job Aids/Tips page of the OCFS CONNECTIONS Internet site (https://ocfs.ny.gov/connect/jobaides/). There you will find resources such as Job Aids, Tip sheets, and Quick Start Guides. These documents and others will provide you with the most up-to-date information on CONNECTIONS.

CONNECTIONS Regional Implementation Staff
If you cannot find the answer to your question(s) within the documentation mentioned above, you can contact one of the many statewide CONNECTIONS Regional Implementation Staff members. The current list of members is always available on the OCFS CONNECTIONS Internet site (https://ocfs.ny.gov/connect/contact.asp) and intranet site (http://ocfs.state.nyenet/connect/contact.asp).

ITS Service Desk
The Office of Information Technology Services (ITS) Service Desk staff is available to answer basic questions related to your equipment, or to solve problems you are having with the CONNECTIONS application. If they cannot solve your problem, they will record your information and forward it to others who can. The ITS Service Desk is staffed 24-hours a day, seven days a week. Upon contacting the Service Desk, you will be given a ticket number. Staff can be reached by phone or email at:

1-844-891-1786
Fixit@its.ny.gov
https://chat.its.ny.gov

Your agency may have procedures in place for contacting the ITS Service Desk. Check with your supervisor before you call.

Application Help Mailbox
The NYS CONNECTIONS User Support/Triage staff can assist users with complex application issues. It is required to contact the ITS Service Desk and receive a ticket number prior to contacting the Application Help Mailbox. Questions, problems, and concerns can be emailed to:

ocfs.sm.conn_app@ocfs.ny.gov

Professional Development Program
Another resource is the CONNECTIONS Training Project of the Professional Development Program (PDP), Rockefeller College, University at Albany. CONNECTIONS trainers can provide you with assistance when you have a question about or are experiencing an issue with any area of CONNECTIONS. For assistance from a CONNECTIONS representative, contact the Professional Development Program at CONNECTIONS@albany.edu. Be sure to include your name, contact information, and your question or issue. A CONNECTIONS representative will respond as promptly as possible by email and/or phone.
Appendix A:
Administrative Directive 19-OCFS-ADM-17
I. Purpose

The purpose of this Administrative Directive (ADM) is to introduce Phase 3 of the Placement Module in CONNECTIONS (CNNX). This new searching/matching component of CNNX is designed to assist local department of social services (LDSSs) and authorized voluntary agencies (VAs) in finding appropriate foster care placements efficiently and quickly. Additionally, management staff may analyze the information gathered in this module to identify placement population trends, program strengths and weaknesses, and project foster home recruitment needs.
II. Background

When a child has been placed by Family Court in the care and custody or guardianship and
custody of an LDSS, it is the responsibility of that LDSS, or a VA under contract with the LDSS,
to place the child in the least restrictive and most home-like setting in which the child can be
maintained safely and receive all services specified in his or her service plan. Traditionally, the
home finder created a manual method for locating placements that involves knowledge of the
child and of the foster care resources available in their community.

III. Program Implications

LDSSs and VAs are required to use the Placement Module effective the release of Phase 3 of
the module, which is currently scheduled for October 18, 2019.

The Placement Module allows workers quick access to all placement-related data, and will
replace the Vacancy Control Module for the few LDSSs and VAs still using it. The Placement
Module will streamline a multitude of processes for many LDSSs/VAs currently handled outside
of CNNX, including placement resource searches and initiating communication between LDSS
and VA’s regarding placements. The Placement Module will help standardize foster care
placement across LDSSs/VAs and promote fact-based, consistent decision making.

Phase 1 and 2 of the Placement Module were implemented to prepare for the searching of
foster homes in Phase 3. The preparation work included:

- Data entry of the “Child Characteristics”
- Data entry of the “Resource Characteristics”
- Data entry of current valid “Contracts” between LDSS and VA’s
- Data entry of email for staff
- Selection of email notifications, and
- Selection of new business functions

Additionally, functionality was included that allows the worker to collect data on special restrictions
that apply to children in foster care. A placement evaluation tool was created that allows workers
to collect information relating to each child in the form of predefined questions and comments.
Reports that support data collection and population and resource monitoring were also
implemented.

While these tasks were preparatory for Phase 3, it should be noted that these are ongoing. As
new resources are established, the characteristics must be entered. “Child Characteristics” should
be updated and maintained regularly, Contracts with Voluntary Agencies should be maintained in
the CNNX application to reflect any new or updated changes, and new staff should have email
and notifications in their profile and the Placement business functions needed for the work they
are doing.

Phase 3 of the Placement Module provides an automated process for identifying a potential
placement from a pool of placement resources that match a child’s characteristics in order to
provide home finders with information that can assist in selecting the most appropriate placement
for a child. The process of matching a child with a resource that meets that child’s needs will

1 18 NYCRR 430.11(d)(1).
have several benefits regarding the permanency of a child’s placement, promoting and supporting a more positive foster care experience for foster children and foster parents, reduction of future moves, and improvement in the safety, permanency, and well-being of children in foster care.

Information from existing CNNX Foster and Adoptive (FAD) stages, the Resource Module, and the Activities Module will be used to determine which resources will be considered in the search and match process. Data collected within the Placement Module will be shared with the Activities Module to eliminate duplicate data stored in and outside of CNNX as well as to expedite the current foster care activities data entry process. There will no longer be direct entries made in the Activities Module for M910 (Child Placed), M981, and M982 (transfers) codes. Direct entries will also not be allowed for M960 (Return from Absence) and M980 (Return from Trial Discharge) when the return is to a different placement setting. These specific Movement codes will originate from the Placement Module. The Placement Module will prepopulate the Activity record with the placement data collected in the Placement Module and require a user to verify and save the record in Activities.

Placement-related data will be collected at a high level and is not intended to replace detailed data collected in the Family Assessment and Service Plan, nor is the module intended to replace valuable communication between placement staff and VA foster care staff. The data will be useful in providing a more accurate understanding of capacity in real time. Data collection rules and security rules will remain as is for all existing modules unless otherwise noted below.

LDSS and VA staff with responsibility for the placement of children must be proactive in maintaining up-to-date and accurate information on their foster boarding homes and congregate care settings as well as for the children needing placement. The goal of the home finder is to find a placement that is a good fit for the child’s interests and needs, and that makes as few changes as possible in the child’s life, (e.g., supporting educational stability by keeping the child in the same school when it is in the best interest of the child, close to family and friends). In addition, there are statutory\(^2\) and regulatory\(^3\) requirements to place siblings together unless it is not in the best interests of one or more of the children to do so.

The Placement Module promotes efficient, best-fit placements by allowing workers to match placement-related child characteristics with resource-provided characteristics to obtain the best foster care resources available on a case-by-case basis.

CNNX will return a list of resources using the multi-facility search based on the following rules:

A. The caseworker first selects a setting type of foster home or a congregate care, enters proximity and school addresses for the child(ren), and designates all child characteristics as either optional or required criteria in the search

B. CONNECTIONS then returns resources based on the below:
   - Resources in **Accepted Active** status
   - Resources with at least the **Program** and **Local Program Types** selected for the search
   - Resources with the required child capacity that can accept the specified gender and age ranges

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\(^2\) SSL §§ 358-a(11), 384-a(1-a) and FCA §1027-a.

\(^3\) 18 NYCRR 428.6(a)(2)(vi) and 431.10.
Resources that are either direct LDSS homes or voluntary agency licensed homes when the voluntary agency has an Active Contract with the placing LDSS
Resources that have all Required Characteristics
Within-county matches are the default returns. Matches with resources outside of the county can also be viewed using “view all”
Resources that have sufficient vacancies to support the request are the default returns. Resources that do not have sufficient vacancies can also be viewed using “view all”
Resources that speak the same language selected within the placement request. This may be the language spoken by the children in the request or the language of the parents of the children
For a “Congregate Care” search, only the selected Facility Type(s) will return

C. The ordering of the results is as follows:
Resources with the greatest number of matching Optional Characteristics to the least number of matching Optional Characteristics
Resources in the same county/borough (for the Administration for Children’s Services) first and then out-of-county/borough when using “view all”
Shortest distance from the home address (when known) first
Shortest distance from the school address (when known) first
Resources certified by the county first
VA resources will return in a rotation. With the longest ago referred agency appearing first in the results, all other things being equal

D. A resource will not return if:
the Close to Home indicator on Resource Characteristics is selected, or
the Office of Refugee Resettlement Unaccompanied Alien Children (ORRUAC) indicator on Resource Characteristics is selected, or
the home is Closed to Intake, or
the Foster Care Agency (FCA) certifying the resource does not have an Active Signed Contract Period in CNNX

Exact Resource Search

In some cases, the LDSS or VA may have already identified a placement resource for the child(ren), such as a kin resource or a former foster parent, in which case a direct match between the child and the placement resource is appropriate.

The “Exact Resource Search” for known resources allows the worker to search for a specific resource by name, resource ID, vendor ID, or address. The existing “Resource Search” window, accessed from within the Placement Module, will be used to allow the worker to select a resource from the “Resource Search List” to be used in the Placement Module. This process allows workers to bypass many of the rules constructed in the multi-facility search process and, as such, in cases where an exact resource search is necessary, workers will be responsible for ensuring foster care policies are followed.

Emergency Kinship Placements

In emergency kinship placement situations, the “Exact Resource Search” from within the Placement Module may be used. In order to ensure that children in foster care are placed
appropriately, it is necessary to enter the information on the identified resource into the FAD stage in CNNX within two business days of the child's emergency placement.

IV. Systems Implications

Placement functionality in CNNX is being built in 4 phases.

In June 2018, Phase 1 implemented windows that support preparatory actions for the Placement Module. These actions included the recording of appropriate child characteristics, resource characteristics, and special restrictions. CNNX will use this information along with information on licensed capacity, setting, program types, language, and proximity and school address information to identify matches. Additionally, the first phase implemented the “Email” tab for recording staff business email addresses. In order for CNNX to communicate automatically with caseworkers and home finders upon Phase 3 implementation, these email addresses must be recorded. See 18-OCFS-ADM-13 dated June 5, 2018, for additional details.

Phase 2 enhanced and provided additional support for the search and match functionality. New reports were released as part of this phase. For each child and resource, they combine and display the information collected during Phase 1. This information can be used during Phase 2 and Phase 3 to assist workers in making placement decisions.

Phase 3 adds search and match functionality to allow for a pool of appropriate placement options to be provided for children entering foster care or moving to a new placement. Additionally, workers will send referrals for desired resources and fully record the child’s placement into foster care within the Placement Module.

Phase 3 of the Placement Module will result in changes to the entry of “Movement Codes” (M codes) in the Activities Module of CNNX. The values M910 Child Placed, M981 Intra Agency Transfer, and M982 Inter Agency Transfer will no longer be displayed in the “Event” dropdown list. These will be system-generated records initiated from the Placement Module. There will no longer be the ability for a LDSS to manually enter these Movement Codes in the Activities Module. However, workers must still save the prefilled record into Activities.

There will be a new grid called the Pending Activities Data Entry grid, which will be visible only to workers with the “Maintain Activities” business function. The status column will remain in “Pending” until four requirements are met. These requirements are:

1. a WMS case exists for the current stage of the child(ren) needing placement
2. a verified Client Identification Number (CIN) exists for the Person Identifier (PID) of the tracked child
3. an Open Track record exists for the selected child
4. the “Verification Status” from the Verify Placements window equals “Placement Verified,” generated by the placement request from which the record was created

When all four of these requirements are met, the “Pending” status will change to “Navigate.” Upon selecting the “Navigate” link from the grid, the new record will display in the Activities Search Window with the following values prefilled:

- Date of Activity
- Type of Activity
• Event
• Facility Modifier(s)
• Reason for Transfer (when applicable)
• Out of County/Borough Reason (when applicable)
• Type of Placement

These values are non-modifiable with the exception of Reason for Transfer, Out of County/Borough Reason, and Type of Placement. Upon a successful save, the status will then be updated to “Complete.”

Listed below is a brief overview of the changes that affect the placement process:

• **Child Characteristics Window**
  o This allows the caseworker to record characteristics for children who are the subject of a placement search. Characteristics recorded on the “Characteristics” subtab (implemented in Phase 1) are displayed for children within the selected stage.

• **Matching Factors - Child**
  o This process allows users to compare the characteristics of a selected resource returned from the Placement Resource Search Process to the characteristics identified for each child included in the Placement Search Request.

• **Matching Factors - Resource**
  o This process allows users to compare the combined characteristics of the child(ren) selected in the Placement Request to the characteristics of one, two, or three resources selected from the Placement Resource Search Result or Referral Detail window.

• **Notifications Tab**
  o The Notifications tab will be used to select which notifications a staff member receives. This tab is modifiable if the employee is in active status and the local part of the employee’s email address has been recorded. Only those in the worker’s LDSS/VA with the “Maint Security” business function can modify this window (most often the security coordinator).

• **Placement Window**
  o This window serves as a central location for child-specific information related to placement needs at the time of a placement request. (Placement requests will be functional with Phase 3.) This window is intended to assist workers in making decisions about placements for children. It is most valuable for those who work with children in foster care and children entering placement, and their supervisors.

• **Prior Placements - Child Window (View-Only Window)**
  o Displays prior foster care placements for the selected child as recorded on the Activities Window.

• **Placement Evaluation Window**
  o This window allows for the entry of additional information with regards to a selected child in need of foster care placement. The data recorded on this window is used to document and communicate detailed information about a child’s needs beyond what is captured for the purpose of resource matching. Workers may use this information to
make more informed decisions when determining the best placement for a child. The data recorded on this window is informational only and has no bearing on the search and match process, nor does it replace any data collected for the children and families in the Family Services (FSS) stage.

- **Priority Criteria Window**
  - This displays a summary of characteristics selected for all children included in the placement request. The data is taken from information recorded on the Child Characteristics window or the Characteristics subtab of the Person List window. Workers will have the ability to designate any, all, or none of the selected characteristics as “Required” in the search parameters. All active characteristics for the child(ren) in the request will default to optional.

- **Prior Placements - Resource Window (View-Only Window)**
  - Displays all prior placements for the selected child at a specific resource as recorded on the Activities window.

- **Placement Dashboard Window**
  - This enables workers to modify, view and monitor all placement requests for cases within their jurisdiction.

- **Placement Resource Roster Window**
  - This displays a view-only list of children placed in a selected resource, with a selected agency, or within a selected LDSS, along with their associated characteristics. Workers will be able to filter and sort by any column. With the exception of child characteristics sorting, any filters applied will carry over to the printed report. The information that displays is based on state, regional, LDSS, or VA worker job function. The “Place Dash” business function is required to access this window.

- **Place Child**
  - This process records the placement action and the date the action occurred for the children in the request.

- **Placement Resource Search Results Window**
  - Combines data collected at the child level and the resource level. The search process will compile the needs of the children as entered by the worker, the requested services and necessary vacancies. The system will then match that criteria to the corresponding real-time resource data and deliver a result set to assist the worker in choosing the best placement resource on a case-by-case basis. To ensure equality within resource distribution, this process will monitor the frequency of placement referrals to VA’s by LDSSs. The system will choose (1) those resources that meet the required search parameters, (2) whose characteristics are most closely aligned with the optional criteria selected and (3) whose agency is next in line to receive a referral.

- **Resource Availability Report**
  - This report will provide workers with on-line and printed offline access to resource vacancy information to be used for afterhours foster care placement needs.

- **Resource Characteristics**
  - This process will allow persons with the business function of “Resource Administrator”
to record characteristics of the resource as they pertain to foster care placement. Prior to implementation of the Placement Module, Resource Administrators will collect current characteristics for existing resources to be used in the matching process.

- **Referral Detail**
  - This process allows for viewing or maintenance of referrals for each placement request. Workers on the receiving end of the referral request are able to respond that the referral for their resource is either ‘Accepted’ or ‘Declined.’ District workers or voluntary agency workers who initiate the placement request and send referral requests will be able to monitor the referral responses.

- **Resource Summary Report**
  - This report will display the current state of the resource and the characteristics and a history of how they have changed.

- **Special Restrictions Window**
  - Displays any extraordinary placement needs that apply to a child. The information displayed on this window does not restrict the available resources for a child to be placed; however, it does alert the worker to potential conflicts between children already in the home and children needing placement.

- **Verify Placements**
  - This process allows for a summary view of all individual children recently placed by, or at specific district or agency. Workers may use this process to verify that children did or did not arrive at the destination resource, after they have been placed from within the Placement Module.

Phase 4 will provide added functionality around reporting.

**Notifications**
The CNNX Placement Module provides automated email notifications to workers for various placement process events involving their LDSS/VA. The use of automated notifications will help to expedite the placement process by keeping LDSS and VA staff informed and reducing manual emails and phone calls.

In order for LDSS and VA workers to receive automated placement notifications, workers must have their business email entered on the staff Email tab and opt into the desired notifications on the Notifications tab. Workers are able to update their own email address. Users with the “Maint Security” business function (most often the security coordinator) can enter the worker’s email and make modifications to the Notifications tab for staff in their LDSS/VA.
V. Additional Information
Effective with the release of the Placement Module, LDSSs and VAs are encouraged to develop business processes to support the new Placement Module functionality in CNNX. The table below provides a listing of placement-related tasks and suggested performers. Actual processes implemented by LDSSs/VAs may vary from those identified in the table.

<table>
<thead>
<tr>
<th>Task Description</th>
<th>District Performer</th>
<th>VA Performer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign Placement BF’s</td>
<td>CNNX Security Coordinator</td>
<td>CNNX Security Coordinator</td>
</tr>
<tr>
<td>Enter Staff eMails</td>
<td>CNNX Security Coordinator/Worker</td>
<td>CNNX Security Coordinator / Worker</td>
</tr>
<tr>
<td>Select Notifications</td>
<td>CNNX Security Coordinator / Worker</td>
<td>CNNX Security Coordinator / Worker</td>
</tr>
<tr>
<td>Enter/Update Contract Headers</td>
<td>District Contract Admins</td>
<td>n/a</td>
</tr>
<tr>
<td>Enter/Update Child Characteristics</td>
<td>FC/CPS/Ongoing Preventive Workers</td>
<td>CP / CW</td>
</tr>
<tr>
<td>Enter/Update Special Restrictions</td>
<td>FC/CPS/Ongoing Preventive Workers</td>
<td>CP / CW</td>
</tr>
<tr>
<td>Create/Modify Resource</td>
<td>FAD Workers or Supervisors</td>
<td>FAD Workers or Supervisors</td>
</tr>
<tr>
<td>Enter/Update Resource Characteristics</td>
<td>FAD Workers or Supervisors</td>
<td>FAD Workers or Supervisors</td>
</tr>
<tr>
<td>Initiate Placement Request</td>
<td>FC/CPS/Preventive Units</td>
<td>Foster Care Supervisor</td>
</tr>
<tr>
<td>Send Referral</td>
<td>FAD Units</td>
<td>HF/FAD Unit</td>
</tr>
<tr>
<td>Receive and Process Referral</td>
<td>FAD Units</td>
<td>Intake or FC Administrator</td>
</tr>
<tr>
<td>Place Child</td>
<td>CPS/FC / FAD Workers</td>
<td>Intake / FC Admin / FAD</td>
</tr>
<tr>
<td>Verify Placement</td>
<td>Foster Care Worker</td>
<td>FAD / FC Administrator</td>
</tr>
<tr>
<td>Update Activities</td>
<td>Data Entry / CM / Administrators</td>
<td>Data Entry Worker</td>
</tr>
<tr>
<td>Close Placement Request</td>
<td>Foster Care / FAD Workers</td>
<td>FAD / FC Administrator</td>
</tr>
<tr>
<td>Perform Placement Evaluation</td>
<td>Case Manager</td>
<td>CP / CW</td>
</tr>
<tr>
<td>Execute a Direct Placement (Known Resource/Relative/CTH/ORRUAC)</td>
<td>FAD Units</td>
<td>FAD Unit</td>
</tr>
<tr>
<td>Close Resource to Intake</td>
<td>FAD Supervisor/ Administrator</td>
<td>FAD Administrator</td>
</tr>
</tbody>
</table>

The following resources are available to assist LDSSs/VAs with the successful implementation of the Placement Module:

- Preparing for the Placement Window in CONNECTIONS: Phase 1 Quick Start Guide
- Preparing for the Placement Window in CONNECTIONS: Phase 2 Quick Start Guide
- Preparing for the Placement Window in CONNECTIONS (WebEx)
- Placement Module Preparation for FAD Workers (WebEx)
- Completing the Placement Module in CONNECTIONS Job Aid
- Completing the Placement Module in CONNECTIONS Classroom Training
- Initiating Placements (WebEx)
- CONNECTIONS Tip Sheet: Placement Dashboard
- CONNECTIONS Tip Sheet: Security Business Functions
- CONNECTIONS Tip Sheet: Initiating the Placement Request in CONNECTIONS

VI. Contacts

Any questions concerning this release should be directed to the appropriate regional office, Division of Child Welfare and Community Services:
Questions regarding the CONNECTIONS changes can be directed to the appropriate CONNEXIONS implementations specialists.

For upstate implementation in BRO, RRO, SRO, and ARO
Linda Gorthy (518) 486-7718
Linda.Gorthy@its.ny.gov

For downstate assistance in SVRO or NYCRO
Don Butler (212) 383-1854
Don.Butler@its.ny.gov

VII. Effective Date
This directive is effective with the release of Placement Module Phase 3. This release is expected on October 18, 2019.

/s/ Lisa Gharney Ogundimu
Issued By:
Name: Lisa Gharney Ogundimu
Title: Deputy Commissioner
Division/Office: Child Welfare and Community Services
Appendix B:
CONNECTIONS Tip Sheet - Initiating the Placement Request
The Placement module provides quick access to all placement-related data. Within CONNECTIONS, you can request placement services and record placement details such as critical address information, resource parameters, and child- and placement-related options. An initial placement request can only be created by a district. Remember, the placement module may be completed by multiple workers. If you have questions about your district/agency’s local protocol for placement-related tasks in CONNECTIONS, you are encouraged to speak with your supervisor.

1. On the My Workload tab, select the appropriate INV, FSI, or FSS stage.

2. Click the Placement link on the NAVIGATION PANE.

3. Click the New button to initiate a new placement request.

Requests for placement are initiated on the Placement window. This window is accessed via the Placement link on the NAVIGATION PANE when one of the following stage types is selected on the workload:

- Investigation (INV)
- Family Services Intake (FSI)
- Family Services Stage/Child Welfare Services (FSS/CWS)
- Family Services Stage/Child Case Record (FSS/CCR)

Clicking the New button initiates a new placement request. Clicking the New Using button prefills fields with data from previous records. The New Using button is disabled if there are no prior requests for placement services.
Select all children who require placement in the Children Needing Placement grid.

'Multi-select' is available to initiate a sibling placement request.

Record the date placement services are needed, which can be up to 14 days in the future.

The optional Placement Worker Assigned field directs a placement request to a specific worker. It is not required in order to complete the request.

If the Proximity Address and/or School Address are not available or do not apply to this request, select the 'not available' checkboxes.

Complete the Critical Address Information section. All addresses must be validated.

The School Address can be manually recorded.
Complete the Resource Search Parameters section.

When you select 'Exact' as the Search Type, the following fields display:
- Exact Reason
- Resource Name
- Resource ID

The Exact Reason field is required.

Record comments related to the request and click the Save button.
Using the links in the Child Options section of the NAVIGATION PANE, record information on child characteristics, the placement evaluation, and special restrictions.

Click the Priority Criteria link on the NAVIGATION PANE and complete the Priority Criteria window.

On the Placement window, select the Place(d) on Dashboard checkbox and click the Save button.

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**Recording Child Options**

Best casework practice is to record Child Characteristics, Special Restrictions, and Placement Evaluation information on the Person List window sub-tabs prior to initiating a placement request. The MAINT PLACE Business Function is required to maintain these windows from the Placement window (step 9 below). Remember to follow your district/agency’s local protocol.

**Child Characteristics Window**

This window allows you to view or modify the characteristics (health–related, behavior–related, etc.) for the child(ren) who will be the focus of a placement search.

**Placement Evaluation Window**

This window contains an evaluation tool for you to record details of the child(ren)’s needs. Information recorded here is not used in the search and match process.

**Special Restrictions Window**

This window displays extraordinary placement needs that apply to a child and alerts you to any potential conflicts that may exist between the child(ren) needing placement and other children already living in a home.

**Priority Criteria Window**

This window displays all characteristics recorded for the child(ren) and allows you to designate individual characteristics as either “Optional” or “Required” in the placement search. All recorded child characteristics default to “Optional.” You will decide—based on child-specific placement needs—which recorded characteristics should be changed to “Required” (e.g., a child in a wheelchair requires a handicap-accessible home). This window must be complete in order to conduct a placement search; however, it is not required in order to place the request on the dashboard. The MAINT PLACE Business Function is required to maintain this window.

Once the Place(d) on Dashboard checkbox is selected and saved, the placement request number is assigned. Edits can still be made to the placement request, but you cannot remove it from the dashboard unless you use the withdrawal process.
Appendix C:
CONNECTIONS Tip Sheet - Getting Ready to Search in the Placement Dashboard Window
The Placement Dashboard window is a central location used to complete the placement search and referral process. Workers with the PLACE DASH Business Function can view placement requests for children in their district/agency. In addition, agency workers can see all open placement requests referred to the agency and those requests that are in “Place” or “Waitlist” status. Additional Business Functions are required in order to maintain, search, and verify a placement status. If you have questions about your district/agency’s local protocol for placement-related tasks in CONNECTIONS, you are encouraged to speak with your supervisor.

**Accessing the Placement Dashboard Window**

1. Click the Search/Maintain drop-down menu on the main CONNECTIONS window.
3. Select a request in the Requests for Placement Services grid. The Placement Request Details section displays.

**Overview of the Window**

The Placement Dashboard window displays the title bar, NAVIGATION PANE, work area, and legend that are standard to most CONNECTIONS windows.

The Search All Placement Requests section at the top of the window allows you to search for a placement. District workers can search by Agency or Case; voluntary agency workers can search by District or Case; and state and Regional Office workers can search by any of the three criteria.
The NAVIGATION PANE Options

The NAVIGATION PANE on the Placement Dashboard window has three sections: Options, Child Options, and Placement Options. The links in these sections provide you with resources to assist you in placing a child with the best-fit resource.

Options

Links in the Options section allow you to verify placements and choose from various ways of viewing search results and placement data. For example, the View Recent link displays placement requests from within the last 30 days (including closed requests). The same link changes to “View Active,” which displays all active placements.

Child Options

Links in the Child Options section allow you to record child-specific information for the placement request. The MAINT PLACE Business Function is required to access these links.

Placement Options

Links in the Placement Options section provide access to search and match functions. The Priority Criteria link allows you to view characteristics recorded for the child(ren). The Placement Search link, which is enabled when the Request Status is “Ready for Search,” conducts a search for resources and displays them in the Placement Resource Search Results window. The Referral Detail link allows you to view or maintain referrals for each placement request. Refer to pages 3 and 4 for additional information on these links.

Reviewing Resource Search Parameters

The Resource Search Parameters section is used to narrow the pool of resources when considering placement options. All fields in this section are modifiable when the Request Status is “In-Process” or when the worker has a specific Business Function.

The Search Type field is where you choose the type of search to perform:

- A “Multi-Facility” search compares the criteria in the request to the services provided at the available resources and returns the most likely resources.

- An “Exact” search allows you to search for a specific (known) resource when it has been determined as the most appropriate resource.

Program Type and Local Program Type are required resource search elements; at least one selection must be made in either grid. Making multiple grid selections that conflict with one another will result in limited or no search results.

Program Types

The Program Types grid is used to identify which Office of Children and Family Services (OCFS) program is required for the placement request. Program Types are defined by OCFS and authorizing agencies; they are not based solely on the characteristics of children currently living in the home. The Program Type selected must correspond with the selected setting (e.g., “Foster Home”).

Local Program Types

The Local Program Types grid is used to identify which county-specific Program Types are required for the placement request. These are recorded on the Resource Characteristics tab by the resource coordinator.
Using the Placement Options Links

As introduced on page 2, clicking the links in the Placement Options section of the NAVIGATION PANE allows you to view information that is used in the search and match process.

Completing Priority Criteria

The Priority Criteria window displays all characteristics recorded for the child(ren) and is used to designate those characteristics as either optional or required in the placement search. This window is required; it must be complete in order to conduct a placement search.

Each placement request has its own priority criteria record that is saved with the request, allowing workers to view the information as it was when the request was opened. Children that are in the case but not included in a particular request will not be included on the Priority Criteria window for that request.

Within the characteristics grid, a column displays for each child in the request. When a characteristic applies to a child, a “Y” displays for it in the child’s column. For each characteristic that applies to the child, make sure the correct radio button—Required or Optional—is selected.

Once the window is complete, the Priority Criteria Complete checkbox at the bottom of the window must be selected and saved.

Updating the Request Status

Once all information for the placement request is complete, the Request Status must be changed to “Ready for Search,” which will enable the Placement Search link.

1. In the Placement Request Details section, click the drop-down arrow for the Request Status field. “In-Process,” “Ready for Search,” and “Withdrawn” display. “Searched” will display after a placement search has been completed.


3. Click the Save button.
Conducting the Placement Search

Once the Request Status is updated to “Ready for Search,” the Placement Search link will be enabled for users with the SEARCH PLACE Business Function. Upon clicking this link, the search is conducted and the Placement Resource Search Results window displays with results that match the search criteria. Results display based on the following and in the order listed:

- Matching Optional Criteria
- Matching Borough (ACS only)
- Matching Community District (ACS only)
- Distance From Proximity Address
- Distance From School Address
- Agency Type ("D" for District or “V” for Voluntary)
- Date of last referral
- Resource ID

If no matches are found, you may wish to click the View All link in the NAVIGATION PANE. This displays resources that match the search parameters, but are either outside of the county that created the request and/or do not have sufficient vacancies. If the search did not provide any suitable results, you may decide to close the request. When closing a request, you will have to provide a placement action such as "No Suitable Placement Found" or “Placement No Longer Needed." A Comments field is available for additional explanation.

Maintaining Referrals for the Placement Request

The Referral Detail window is used to view and maintain referrals for the placement request. There is no limit on the number of referrals that can be sent. Up to 10 referrals may be sent at one time. In addition, each district/agency should determine how many resources should be explored before sending referrals.

The staff member who reviews placement requests may be a home finder, Office of Placement Administration (OPA) staff, or a supervisor of either. It is important to follow the protocol of your district/agency. Staff employed at the placing agency can maintain referrals with the SEARCH PLACE Business Function; otherwise the RESOURCE COORD (Coordinator) Business Function is required.

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