NEW YORK STATE | Office of Children and Family Services

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 will 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 placement requests. 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.

2 Select "Placement."
*The **Placement Dashboard** window displays.*

3 Select an entry from the **Requests for Placement Services** grid.
*The **Placement Request Details** display.*

Exploring the Widow

The *Placement Dashboard* window is very similar to the *Placement* window with the standard title bar, **NAVIGATION PANE**, work area, and legend.

The **Search All Placement Requests** section (at the top of the window) allows you to search for a placement.

Voluntary agency workers can search by District or Case. State and Regional Office workers can search by District, Agency, or Case.

Selecting a request for placement will display the **Placement Request Details**.

The **New Using** button enables when a placement is selected. It allows you to create placement requests for additional children in the stage using previously recorded information.

! = Sensitive   * = Required $ = AFCARS   ✓ = Data Exists   (C) = Complete   🔒 = Read-Only Mode   📝 = Unsaved Changes

Exploring 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.

Options

The links in the **Options** section provides various way of viewing search results and placement data. For example, the **View Recent** link toggles to **View Active** allowing you to view placements within the last 30 days or just active ones. Other links in this section allow you to verify placements, view a list of children placed in a selected resource, and view the current number of active resources.

Child Options

The links in the **Child Options** section provide the ability to record child-specific information regarding the placement request. The MAINT PLACE Business Function is required for access to **Child Options**.

Placement Options

Placement Options links provide access to search and match functions. Use the **Priority Criteria** link to view characteristics (such as dietary restrictions) that are recorded for the child. The **Placement Search** link is enabled when the Request Status is "Ready for Search" and will assist in matching the child's needs to corresponding real-time resource data. The **Referral Detail** link is used for viewing or maintaining referrals for each placement request. (Refer to page 3 for additional information.)

Reviewing Resource Search Parameters

The **Resource Search Parameters** section is used to narrow the pool or 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 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.

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

In order to search for a placement, the **Program Types** and/or **Local Program Types** in the **Resource Search Parameters** section must be completed. Both Program Types refer to the foster/adoptive home type and are not resource characteristics.

The **Program Type** 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.

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

Choosing multiple **Program Types** and/or **Local Program Types**, or types that conflict with one another, will result in limited or no search results.

Using the Placement Options Links

You will use the links in the **Placement Options** section of the **NAVIGATION PANE** to view information that is used in the search and match process.

Priority Criteria

The *Priority Criteria* window displays all the recorded characteristics for the child(ren) and indicates if they are required or optional. A "Y" displays in the column next to the characteristic. Use the scroll bar on the right side to view all the characteristics.

The *Priority Criteria* window is a required window and must be completed in order to complete a placement search. Children that are in the case but not included in a particular placement request will not be included on the *Priority Criteria* window for that request.

Updating the Request Status

The placement search will match child characteristics within the request to resource characteristics with vacancies in CONNECTIONS. The search function will return a list of potential placement resources. To update the **Request Status** drop-down field to "Ready for Search," do the following:

1. In the Placement Request Details of the *Placement Dashboard* window, click the drop-down arrow for the **Request Status** field.
   "In-Process," "Ready for Search," and "Withdrawn" display.

2. Select "Ready for Search."
   *The **Placement Search** link enables.*

3. Click the **Save** button.

Placement Search

The **Placement Search** link will be visible for users with the SEARCH PLACE Business Function. Clicking the **Placement Search** links displays the *Placement Resource Search Results* window with the results from the search.

The resources are sorted in order of:

- Matching Optional Criteria
- Matching Borough (ACS only)
- Matching Community District (ACS only)
- Distance From Proximity Address
- Distance From School Address
- Agency Type (**D/V** [District/Voluntary] column)
- Date of last referral
- Resource ID

If there are no matches for the search criteria you entered, a message displays stating that no resources match the requested criteria in the county of the placement stage.

This message indicates you may have to click the **Close Request** button on the *Placement Resource Search Results* window and restart the search with new criteria.
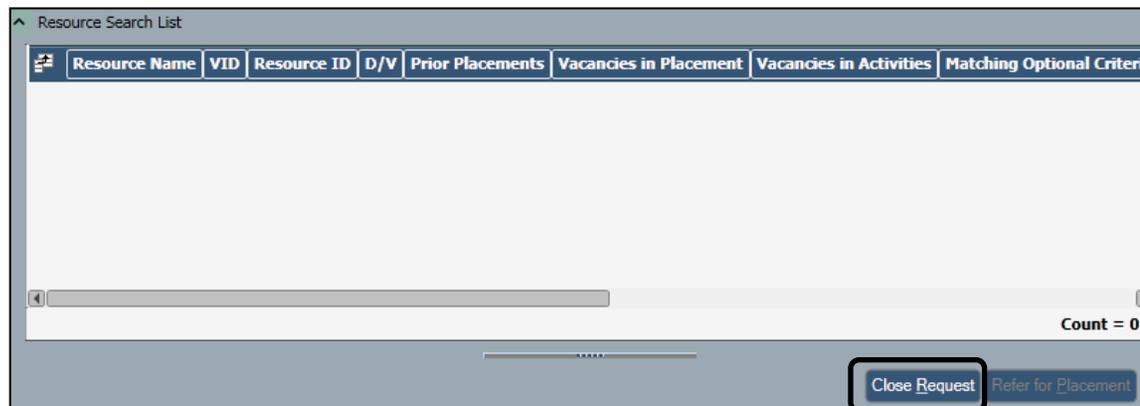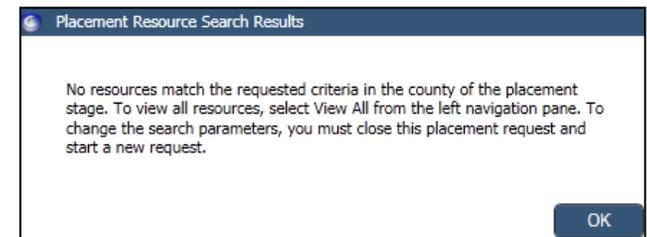
Referral Detail

The person 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. The *Referral Detail* window provides for viewing or maintenance of referrals for each placement request. Workers that are employed at the placing agency can maintain referrals with the SEARCH PLACE Business Function; otherwise workers will need the RESOURCE COORD (Coordinator) Business Function.