

6/5/2008

System Build 18.9.7 (Q2-08) ***Job Aid***

Functionality for all Users of ***CONNECTIONS***



CONNECTIONS Training Project
Professional Development Program
Rockefeller College
University at Albany

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**CONNECTIONS - System Build 18.9.7 (Q2-08) Job Aid
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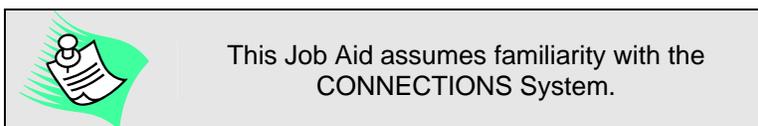
Introduction

This Job Aid is intended for all CONNECTIONS users. It provides a detailed overview of the CONNECTIONS system changes being introduced with Build 18.9.7 (Q2-08).

Improvements to CONNECTIONS that are implemented periodically through SIRs and Change Requests are referred to as "Builds." Since these improvements are implemented on a quarterly basis, they are also being called Quarterly Improvement Plans and are referred to this year as Q1-08; Q2-08; Q3-08 and Q4-08. The Q1, 2, 3, or 4 means the quarter of the year beginning in January and "08" means 2008. Build 18.9.7 to be released in June is called "Q2-08." In the future, after Build 18.9.10, the "Build" designation will be dropped and the improvements will be referred to as "Q1, 2, 3, or 4-the year."

With the implementation of Build 18.9.7 (Q2-08), several important changes will improve the CONNECTIONS system. It should be noted that many of the enhancements included in this Build originated from a collaborative effort on the part of OCFS, local district and voluntary agency casework and supervisory staff, who were members of the Functional Improvement Team (FIT). Specifically, this Job Aid contains information about enhancements in the following functional areas:

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



This Job Aid is available online on the CONNECTIONS intranet site:

OCFS.state.nyenet/connect/jobaides.asp

The CONNECTIONS intranet site also contains information about CONNECTIONS training.

Child Protective Case Summary: Prior Case Summary Report

With the implementation of Build 18.9.7 (Q2-08), CPS workers will be able to generate a CPS Prior Case Summary Report, which provides a summary of the entire case history of family members in a new CPS intake or investigation.

The Prior Case Summary Report is an on-demand report that can be run at any time. Since it runs in the background of the desktop, it doesn't affect any other work being done in CONNECTIONS. The report is available from the *Assigned Workload* by highlighting an Intake or Investigation stage and selecting the **Prior Case Summary Report** command on the **Reports** menu. It can only be generated by local district CPS workers. Voluntary agency workers are not permitted access to this report due to the confidentiality of Unfounded reports.



NYC Workers:
Check with your supervisor for information on your agency's policy and procedures for generating the report.

The report summarizes all prior CPS and FSS stages for individuals in the current investigation. This case-level report is divided into four sections:

- **Household Composition**—Contains current demographics for individuals in the target stage (Intake or Investigation) from which the report was launched.
- **Role Information**—Contains a list of prior stage involvement for each individual in the target stage, including, stage type, classification, determination, and start and end dates, as well as individual role and relationships.
- **Detailed Stage Information**—Contains specific information for each cross-referenced stage listed in the Role Information section. Information varies by stage type, but includes:
 - information on In-process, Indicated and Unfounded investigations, such as allegations, safety and risk information;
 - Family Services Intake information such as requested emergency services, Behavioral Concerns and Family Issues data, etc.;
 - Family Services Stage information such as Permanency Planning Goal (PPG), Program Choice, Risk Rating and Safety Assessment data, etc.; and
 - worker and agency information for all stages.
- **Additional Individuals**—Lists persons who are not in the target stage, but who were in one or more of the cross-referenced stages. For example, this might include duplicate persons, adults who are no longer in the current household, or other children or adults actually in the household who were not mentioned in the target stage.



No Reporter/Source information is included in the report.



Due to the comprehensive and sensitive nature of the information contained in the report, you need to take all precautions to ensure that it does not fall into the hands of anyone not fully authorized to have the information it contains.

See Appendix A for a sample of the Prior Case Summary Report.

Due to the potential size of the report, each agency may have procedures in place for printing the document. You should check with your supervisor for printing policies.

Although this Report contains a more comprehensive view of a family's history than other reports currently available, it is still only one source of information and is no substitute for the gathering of all available information, such as a thorough review of all records and consultations with other involved workers to the fullest extent possible.

Reports are only as good as the information they are drawing upon in CONNECTIONS. That is why it is very important to merge persons with multiple Person IDs; otherwise, a complete case history will not display. Each individual in the database should have only one Person ID. The new monthly Multiple Person Report can be used to assist in completing the person merge process. It is also a good idea to make any other necessary updates to case information before printing this report, which will greatly add to its accuracy.

Whenever adding a person to a stage, you need to understand the importance of doing a good search and relating, when appropriate, to existing Person IDs in CONNECTIONS.

The programmatic requirements relating to a comprehensive review of records of prior reports are not satisfied by a review of the new Prior Case Summary Report. Workers that receive a new investigation continue to be responsible for the following:

- Within one business day of the oral report, review SCR records pertaining to all prior reports involving the members of the family, including legally sealed reports, where the current report involves a subject of the Unfounded report, a child named in the Unfounded report, or a child's sibling named in the Unfounded report.
- Within five business days of the oral report review local district's own CPS records that apply to the new report, including legally sealed Unfounded reports.
- Within one business day of the oral report request relevant portions of records regarding cases investigated by other districts, if applicable.



Step-by-Step: Generating the Prior Case Summary Report

- 1 Click on the **WORK** button on the CONNECTIONS Toolbar.
The Assigned Workload displays.
- 2 Select the desired INV or INT stage.
- 3 Click on the **Reports** menu and select the **Prior Case Summary Report** command.
*The following message displays:
"The Report has been launched. Check Report List Window."*
- 4 Click on the **OK** button.
- 5 Click on the **RPRTS** button on the Toolbar.
The Report List displays.
- 6 Select the Prior Case Summary Report.
Make sure the report's status reads "DONE." If it does not, either refresh the window by clicking on the Refresh button, or close the Report List and try again in a few minutes. You need to wait for the report to launch completely before you can view it.
- 7 Click on the **Open** button.
The report displays as a Microsoft Word document.



When the report can not be launched, the following message displays:
"The report could not be launched. Contact Help Desk."

Closed Person Stage Involvement Report

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

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

See Appendix B for a sample of the Closed Person Stage Involvement Report.



The decision to complete a Person Merge/Split should be thought out thoroughly and discussed with your supervisor, if necessary, prior to completing the merge or split.

In order to split or undo two Person IDs merged in error, a worker must reactivate the closed Person ID and manually restore the closed person to the appropriate stages, with the correct role.



Step-by-Step: Generating the Closed Person Stage Involvement Report

- 1 Click on the **WORK** button on the CONNECTIONS Toolbar.
The Assigned Workload displays.
- 2 Select the desired stage from the *Assigned Workload*.
- 3 Click on the **Options** menu and select the **Person List** command.
The Person List displays.
- 4 Select the desired person from the grid.
- 5 Click on the **Options** menu and select the **Person Merge/Split** command.
The Person Merge/Split window displays.
- 6 Select the person from the grid.
- 7 Click on the **Reports** menu and select the **Closed Person Stage Involvement** command.
- 8 The following message displays:
*"The Report has been launched. Check Report List Window."
You can click on the **RPRTS** button at any time. You don't need to close any other windows to do so.*
- 9 Click on the **OK** button.
- 10 Click on the **RPRTS** button on the CONNECTIONS Toolbar.
The Report List displays.

- 11** Click on the Closed Person Involvement Report.
Make sure the report's status reads "DONE." If it does not, either refresh the window by clicking on the Refresh button, or close the Report List and try again in a few minutes. You need to wait for the report to launch completely before you can view it.
- 12** Click on the **Open** button.
The report displays as a Microsoft Word document.
- 13** To print the report, click on the **File** menu and select the **Print** command.
The Microsoft Word Print dialog box displays.
- 14** Verify that the default printer choice is correct. If you want to print multiple copies, enter the number in the Copies field.
- 15** Click on the **OK** button.
The document is sent to the selected printer.
- 16** To close the report, click on the **File** menu and select the **Close** the command.

Family Assessment and Service Plans (FASPs)

Enhancements to the FASP Tree

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

► **Required**

An indicator of “Required” will appear on the tree next to FASP components that must be completed based on the program choice and PPG in effect when the FASP is launched.

► **Optional**

○ An indicator of “Optional” will appear on the tree next to components that are added by a worker through “Add a FASP Component.”

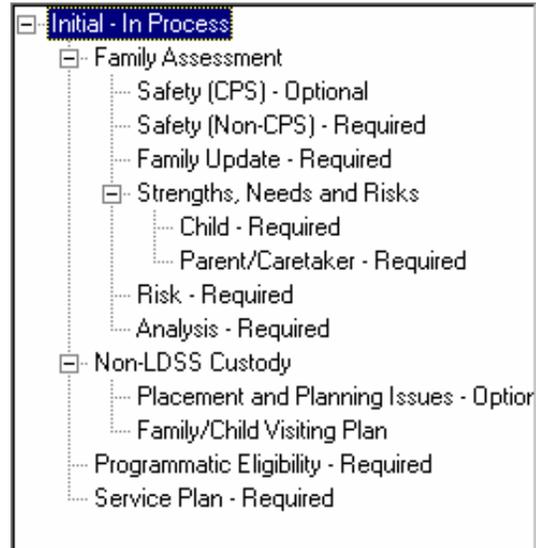
- The system does not require a component that was added by a worker to be completed in order to submit the FASP for approval.
- An optional component added by a worker will remain on the tree regardless of whether information is entered for that component.

○ An indicator of “Optional” will appear on the tree next to components that were required at one time based on Program Choice/PPG, but are no longer required due to a change in that Program Choice/PPG after FASP launch. The “Optional” indicator will appear whenever data had been previously saved for the component.

- The system does not require these components be completed in order for the FASP to be submitted for approval.
- If no information is recorded for these optional components, they will no longer be visible on FASP tree after the Program Choice/PPG change.
- If any information is recorded in the component it will remain on the FASP tree as “Optional.”

► **Not Applicable**

An indicator of “Not Applicable” will appear on the FASP tree for RAP and Parent/Caretaker Scales when these components are not enterable because a Parent/Caretaker has not been identified on the **Stage Composition** tab.



- ▶ There will be no indicators displayed on the tree for:
 - components that are on the tree, but optional until data is entered. These are:
 - Non-LDSS Visiting Plan
 - Non-LDSS Life Skills Assessment
 - Discharges
 - Plan Amendment



You can delete a Discharge Protocol that was launched in error or where the incorrect version was selected. When a Discharge Protocol is deleted, it is deleted for *all* children in a stage, not just the selected child.

To delete the information from the *Discharges* window, click on the **Options** menu and select **Delete Protocol**.

The following message displays:

“This Discharge information will be deleted for all children. Do you wish to continue?”

Clicking on the **Yes** button deletes the selected discharge protocol information; the label for the deleted protocol is **New**.

If you selected the incorrect discharge type, you can select the appropriate one and complete the protocol. Clicking on the **No** button brings you back to the *Discharges* window to allow you to do so.

Enhancements to the Check FASP Detail Component Status Window

Each FASP, Removal Update or Plan Amendment contains multiple components that are required to be completed before a FASP is submitted for approval. At any time during the completion of a FASP, you can click on the **Check FASP Detail** (or **Check Removal Detail**) button to receive a list of incomplete components, if any. Prior to Build 18.9.7 (Q2-08), in order to complete a component you had to close the *Check FASP Detail Component Status* window and navigate from the FASP tree to that component.

With the implementation of Build 18.9.7 (Q2-08), the Check FASP Detail process is made simpler. When a FASP component is incomplete, you can navigate *directly* from the *Check FASP Detail Component Status* window by clicking on an incomplete component. This action opens the first tab of the selected component, allowing you to complete any necessary work on that tab or, if necessary, to navigate to other tabs within that component. Upon closing the selected component, the *Check FASP Detail Component Status* window displays.

If you select an incomplete component for an In Process or Pending FASP/Plan Amendment with a due date of one year or more before today's date, the following message displays with **Yes** and **No** buttons:

"Please confirm your decision to mark the in-process or pending FASP to Template Format."

Clicking on the **Yes** button will drop the FASP to template format and return you to the *Family Assessment and Service Plan* window. Clicking on the **No** button will maintain the status as is; the *Check FASP Detail Component Status* window will remain open.

Check FASP Detail Component Status

File Options Reports Help

The FASP Components listed below are not ready for submission. Selecting a component will open the respective component detail window.

- Family Assessment/Analysis/Family View/Case Planner Summary
- Family Assessment/Analysis/Behaviors Contributing Factors/Case Planner Summary
- Family Assessment/Analysis/Strengths/Case Planner Summary
- Family Assessment/Analysis/Needed Improvements Changes/Case Planner Summary
- Family Assessment/Strengths, Needs and Risks/Child/Collins,Patrick
- Family Assessment/Strengths, Needs and Risks/Child/Collins,Kimberly
- Family Assessment/Strengths, Needs and Risks/Child/Collins,Tyler
- Family Assessment/Family Update/Legal Activity
- Family Assessment/Strengths, Needs and Risks/Parent-Caretaker
- Programmatic Eligibility/Preventive
- Family Assessment/Risk
- Family Assessment/Safety (Non-CPS)
- Service Plan/Family Involvement/Case Planner Summary
- Service Plan/Outcome and Activities

Refresh List Submit for Review Submit Close

A new button has been added to the *Check FASP Detail Component Status* window: **Refresh List**, which updates the component list. This button is enabled whenever there is an incomplete component. You may wish to click on this button, for example, after navigating from the window and completing additional work on an incomplete component. If the work you performed completed the component, clicking on the **Refresh List** button will remove the completed component from the list.



Step-by-Step: Navigating to an Incomplete Component

- 1 Click on the **Check FASP Detail** button.
The Check FASP Detail Component Status window displays. If there are any incomplete FASP components, they display on the window. If all FASP components are complete, the window is clear.
- 2 Click on an incomplete component to navigate to the corresponding section of the FASP.
The selected component displays.



Where am I?

*Assigned Workload > FSS >
Tasks > FASP tab*

Approval To-Do Enhancement for Multiple Approvers

Currently, when a FASP, Removal Update, or FSS stage closure is submitted for multiple approvals, there is a hierarchy established by the system, which allows the approvers to complete their approvals in a defined sequence; this typically occurs when there is voluntary agency involvement. However, the Approval To-Do that each approver received did not provide them with any indication that the FASP, Removal Update, or stage closure was ready for them to approve.

With the implementation of Build 18.9.7 (Q2-08), the text of these Approval To-Dos contains an indicator that specifies whether or not the FASP, Removal Update, or stage closure is ready for that particular approver to approve, which serves to minimize potential confusion.

The following message displays upon selecting the Approval To-Do and clicking on the **Navigate...** button when the FASP, Removal Update, or stage closure is not yet approvable because of the order in which the approvals must occur:



Clicking on the **Yes** button displays the FASP report, Removal Update report, or *Case Summary* window, depending on the To-Do. Clicking on the **No** button returns you to the *Staff To-Do List*.

Permanency To-Dos

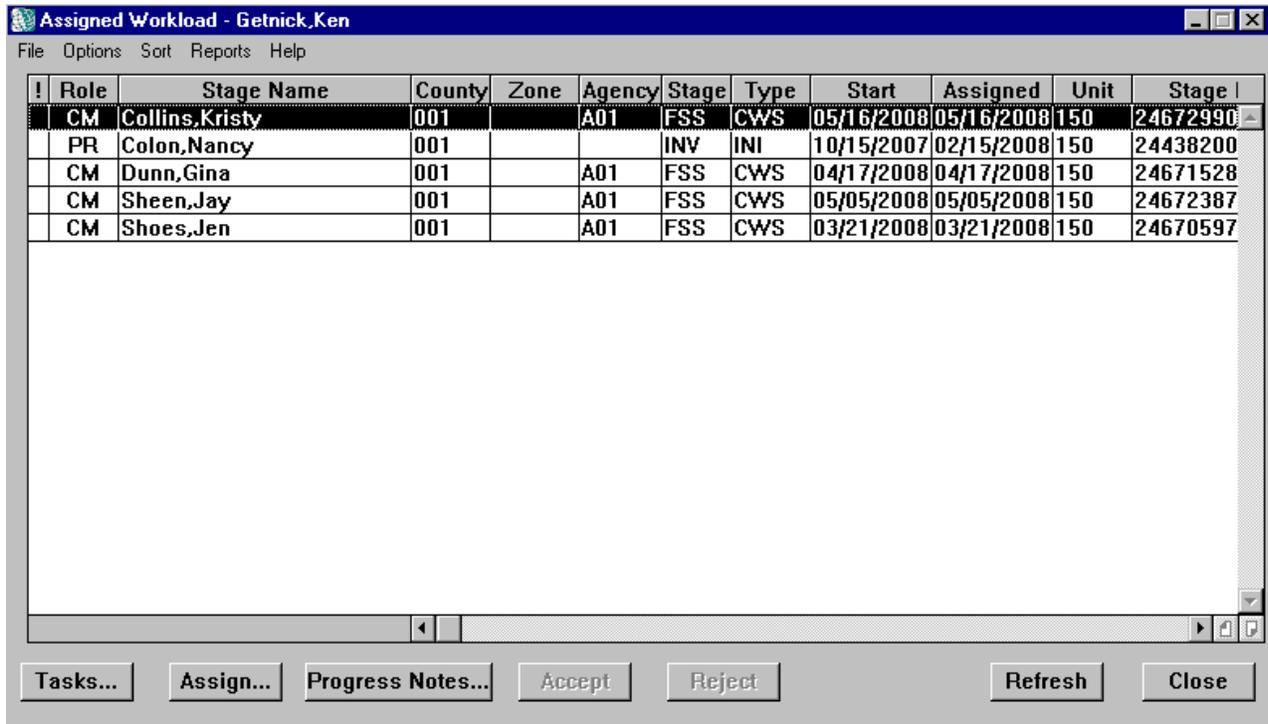
With the implementation of Build 18.9.7 (Q2-08), Permanency Hearing Report To-Dos display as Alert To-Dos. This will eliminate the error you received when attempting to navigate from a Permanency Hearing Report Task To-Do.

Alert To-Dos will be generated when a Permanency Hearing Report is coming due or overdue. In addition, if the Permanency Hearing Date Certain is greater than 75 days from today's date, an Alert To-Do will be generated, which informs you that an SPR/Consultation is due no earlier than 60 days prior to the Permanency Hearing Date Certain.

Although you will have to manually navigate to the Permanency Hearing Report tab to launch and complete the report, you will be able to delete the Alert To-Dos when you no longer need them.

Accessing Progress Notes

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



Step-by-Step: Accessing Progress Notes via the Assigned Workload

- 1 Click on the **WORK** button on the CONNECTIONS Toolbar.
The Assigned Workload displays.
- 2 Select the appropriate stage.
*The **Progress Notes...** button enables.*
- 3 Click on the **Progress Notes...** button.
The Progress Notes window displays.

Adoption Finalization/Stage Closure

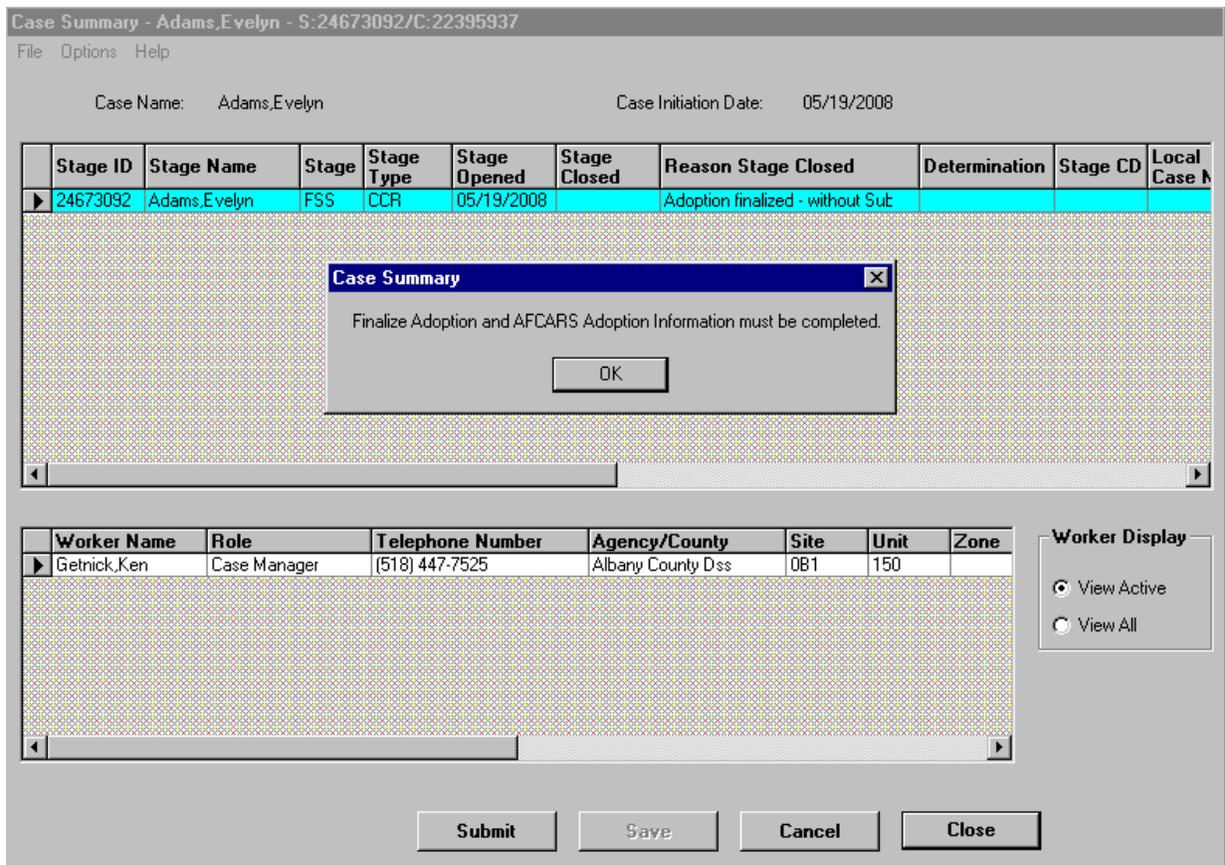
Prior to the implementation of Build 18.9.7 (Q2-08), you could close a CCR stage with an Adoption Finalized closure reason without recording the necessary information on the *Finalize Adoption* window. If the adoption finalization was not saved before the CCR stage was closed, the record was not sealed. All finalized adoption records must be sealed in the system.

With the implementation of Build 18.9.7 (Q2-08), in order to properly seal the record you must complete and save all required information on the *Finalize Adoption* and *AFCARS Adoption Information* windows before you can save the closure reason and proceed with closing the stage.

All case closure reasons will display in the **Reason Stage Closed** drop-down menu on the *Case Summary* window, including the Adoption Finalized closure reasons (“Adoption Finalized with Subsidy” and “Adoption Finalized - without Subsidy”). If you select one of these closure reasons and the *Finalize Adoption* window has not been completed, the following message displays upon clicking on the **Submit** button:

“Finalize Adoption and AFCARS Adoption Information must be completed.”

You must complete the *Finalize Adoption* and *AFCARS Adoption Information* windows in order to proceed with closing the CCR stage.



Also supported in Build 18.9.7 (Q2-08) is the capacity for a New York State employee assigned the MAINT ADOPT FINL Business Function to update closed CCR cases where it is needed.

Security: Maintain Education Business Function

With the implementation of Build 18.9.7 (Q2-08), the MAINT EDUCATION Business Function is available and associated access is supported in CONNECTIONS. Although the Enter Education Security Attribute was made available in a previous Build, it becomes operational with the MAINT EDUCATION Business Function created in Build 18.9.7 (Q2-08).

This Business Function, in conjunction with the CASE/PERS SEARCH or CASE SEARCH Business Function provides workers *without* a role in the stage with the ability to view and record education information. This Business Function provides access only to the Education functionality, allowing workers who specialize in educational services to complete their work.

It is recommended that a staff person who has responsibility for the entry of education information, but no other responsibility for a stage should be given this Business Function. For example, a typical use of this Business Function is for educational staff in voluntary agency on-campus schools. This will limit access to a child's full CONNECTIONS record and instead provide access only to the portion of the record that is relevant to them, which is the Education functionality.

If an agency or district is using Agency Access, those settings must be considered when assigning the MAINT EDUCATION Business Function. The Security Coordinator needs to take certain actions for person(s) with only the MAINT EDUCATION and CASE/PERS SEARCH (or CASE SEARCH) Business Functions in order to prevent inappropriate access to information:

- Do not make the user Case Assignable.
- Do not make the user a Unit Approver.
- Do not put the user in a supervisory unit in the Organizational Hierarchy.
- Do not give the user a Job Type.

The *Agency Access* window is used to create and maintain FSI and FSS stage access privileges for persons within your agency. Agency staff can be granted view privileges, maintain privileges or no privileges for each staff grouping (i.e., Case Assignable Staff, Unit Approvers, and those in the Direct Supervisory Line). Access must be granted on a “*Need to Know*” basis; no staff should be granted access until or unless they need that access.



Refer to Appendix C for the MAINT EDUCATION Business Function Guidelines.



If a worker who needs access only to education information in CONNECTIONS is assigned a role in the stage, that worker should be unassigned and instead given the MAINT EDUCATION and the CASE/PERS SEARCH (or CASE SEARCH) Business Functions.



Step-by-Step:
Accessing the *Education Window*
(with the *MAINT EDUCATION Business Function*)

- 1** Click on the **CASE** button on the CONNECTIONS Toolbar.
The Case Search Criteria window displays.
- 2** Enter the Case ID number in the **Case ID** field (or the Stage ID number in the **Stage ID** field).
*The **Search** button enables.*
- 3** Click on the **Search** button.
The Case List displays with the only case that matches the search criteria.
- 4** Select the case from the *Case List*.
*The **Summary** button enables.*
- 5** Click on the **Summary** button.
The Case Summary window displays.
- 6** Select the Family Services Stage.
- 7** Click on the **Options** menu and select the **Stage Maint** command.
A sub-menu displays.
- 8** Select the **Maintain Education** command.
The Education window displays.

Support Tools

Online Help

CONNECTIONS Online Help provides descriptions for various windows, as well as step-by-step instructions for common tasks. You can access Online Help at any time, from any window in CONNECTIONS by clicking on the **Help** menu or pressing the **F1** key on your keyboard.

The **Contents**, **Index** and **Search** tabs in Online Help allow you to search for and navigate to the topic(s) on which you need help.



Step-by-Step: Accessing Online Help

- 1 Click on the **Help** menu on the CONNECTIONS Toolbar.

The following list of commands displays:

Contents	<i>A table of contents for the help facility with links to major sections.</i>
How Do I?	<i>Step-by-step instructions to help you complete tasks using CONNECTIONS.</i>
Window Descriptions	<i>Descriptions of windows in CONNECTIONS, along with information on various fields.</i>
DSS Policy	<i>Online OCFS policy handbooks (under revision).</i>
Help On This Window	<i>Window description help for the window you are on.</i>
Help for Help	<i>Instructions on how to use the help functionality.</i>
About CONNECTIONS	<i>Information about the current CONNECTIONS version and build.</i>

- 2 Click on a command from the **Help** menu.
*The window related to your selection displays. In some cases, you will need to make another selection in that window to obtain instructions. At the top of each window you will see additional buttons and menus. Use the **Search** button to search for specific information in the Help function and use the **Back** button to return to windows you have just visited in Help. The **Glossary** button opens a list of important CONNECTIONS terms and the **Print** button allows you to print Help information.*
- 3 When you are done reviewing information in Help, close each *Help* window by clicking on the **Close** button (☒) in the top right corner of the window.
The system returns to the window you were using when you accessed Help.

OCFS CONNECTIONS Intranet Site

A variety of training-related materials are available from the OCFS CONNECTIONS intranet site (<http://ocfs.state.nyenet/connect/>). The intranet site contains a wealth of information related to various aspects of CONNECTIONS, including training schedules, Alerts and Notices, Step-by-Step Guides (including the *CONNECTIONS Case Management Step-By-Step Guide*), Job Aids and Frequently Asked Questions (FAQs). Release Notes—a complete list of the modifications, enhancements, fixes and impacts in the Build—is also available from the CONNECTIONS intranet site.



Step-by-Step: Accessing the OCFS CONNECTIONS Intranet Site

- 1 From your local desktop, double-click on the **Internet Explorer** icon.
- 2 If the browser does not display the OCFS intranet site automatically, enter <http://ocfs.state.nyenet> into the browser's address line and press the **Enter** key on your keyboard.
The OCFS intranet home page displays.
- 3 Click on the **CONNECTIONS** link.
The CONNECTIONS home page displays.
- 4 Click on a topic to access information. For access to various Step-by-Step Guides and Job Aids, click on the **Step-by-Step/Job Aids/Tips** link. For access to Release Notes for a Build, click on the **Implementation** link.
- 5 To close Internet Explorer, click on the **File** menu and select **Close**.

Enterprise Help Desk

The New York State Office for Technology (NYS OFT) Enterprise Help 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.

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

The Enterprise Help Desk is staffed 24 hours a day, seven days a week. The telephone number is:

1-800-NYS-1323
(1-800-697-1323)

When you call the Enterprise Help Desk with a problem, you will be given a ticket number to use for tracking your issue and its resolution. Keep a record of this number; you will need it for any follow-up conversations with the Enterprise Help Desk.

App Help Mailbox

In addition to calling the Enterprise Help Desk with application issues, district staff can directly contact the NYS CONNECTIONS User Support/Triage staff for help with complex application issues. Questions, problems and concerns can now be emailed to:

ocfs.sm.conn_app@ocfs.state.ny.us

The 'App Help' mailbox is intended to provide an expanded level of support. It is meant for questions that have had an initial review by agency staff who are proficient in CONNECTIONS (e.g., Resource Users). For example, if you have an issue for which you have unsuccessfully sought advice from your supervisor or a Resource User, it would be appropriate to contact the App Help mailbox with the issue. However, your in-agency resources should always be your first contact when trying to resolve an issue.



For more information on the App Help mailbox, refer to the Implementation page of the OCFS CONNECTIONS intranet site:

<http://ocfs.state.nyenet/connect/imp/>

**Appendix A:
Prior Case Summary Report**

CASE ID: 22396150 CASE NAME: Collins,Kristy
 STAGE ID: 24673357 STAGE NAME: Collins,Kristy

**Section 1:
 HOUSEHOLD COMPOSITION**

<u>Name</u>	<u>Sex</u>	<u>DOB</u>	<u>DOB</u>	<u>Language</u>	<u>Race</u>	<u>Phone</u>	<u>PID</u>
Collins, Kristy 109 FAYETTE BLVD , SYRACUSE, NY 13224-1127	F	03/22/1975		English	White	(315) 555-2424	30796 749
Collins, Thomas 109 FAYETTE BLVD , SYRACUSE, NY 13224-1127	M	11/24/1968		English	White	(315) 555-2424	30796 234
Collins, Patrick 109 FAYETTE BLVD , SYRACUSE, NY 13224-1127	M	04/22/1992		English	White	(315) 555-2424	30796 235
Collins, Kimberly 109 FAYETTE BLVD , SYRACUSE, NY 13224-1127	F	08/16/2000		English	White	(315) 555-2424	30796 236
Collins, Tyler 109 FAYETTE BLVD , SYRACUSE, NY 13224-1127	M	03/03/2007		English	Not Reported	(315) 555-2424	30796 237

**Section 2:
 ROLE INFORMATION**

<u>Name</u>	<u>PID</u>	<u>Stage</u>	<u>Type</u>	<u>Class</u>	<u>Role</u>	<u>Rel/Dnt</u>	<u>Stage ID</u>	<u>Determination</u>	<u>Stage Start</u>	<u>Stage End</u>
Collins, Kristy	30796 749	FSS	CWS		Services Recipient	Mother	24673354	IND	05/22/2008	05/22/2008
		INV	INI	CPF	No Role	Mother	24673351			
		FSS	CWS		Services Recipient	Unknown	24672990			
Collins, Thomas	30796 234	FSS	CWS		Services Recipient	Biological Father	24673354	IND	05/22/2008	05/22/2008
		INV	INI	CPF	Confirmed Subject	Biological Father	24673351			
		FSS	CWS		Services Recipient	Parent	24672990			
Collins, Patrick	30796 235	FSS	CWS		Services Recipient	Child	24673354	IND	05/22/2008	05/22/2008
		INV	INI	CPF	Confirmed Abused	Child	24673351			
		FSS	CWS		Services Recipient	Child	24672990			
Collins, Kimberly	30796 236	FSS	CWS		Services Recipient	Child	24673354	IND	05/22/2008	05/22/2008
		INV	INI	CPF	Confirmed Maltreated	Child	24673351			
		FSS	CWS		Services Recipient	Child	24672990			
Collins, Tyler	30796 237	FSS	CWS		Services Recipient	Child	24673354	IND	05/22/2008	05/22/2008
		INV	INI	CPF	Confirmed Maltreated	Child	24673351			
		FSS	CWS		Services Recipient	Child	24672990			

**Section 3:
 DETAILED STAGE INFORMATION**

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Case & Stage: C: 22396148 S: 24673351 **Stage:** INV **Type:** INI
Start Date: 05/22/2008 **End Date:** 05/22/2008 **County:** 001 **Zone:** **Sensitive:** N **HP:** Y **Factor:** 03 **Class:** CPF **Determination:** IND

STAGE COMPOSITION

<u>Name</u>	<u>PID</u>	<u>DOB</u>	<u>Role</u>
Collins,Kristy	30796749	03/22/1975	No Role
Collins,Kimberly	30796236	08/16/2000	Confirmed Maltreated
Collins,Tyler	30796237	03/03/2007	Confirmed Maltreated
Collins,Patrick	30796235	04/22/1992	Confirmed Abused
Collins,Thomas	30796234	11/24/1968	Confirmed Subject

CURRENT/LAST ASSIGNED WORKERS

<u>Role</u>	<u>Name</u>	<u>Phone Number</u>
Histor. Primary	Getnick,Ken	(518) 447-7525

ALLEGATION INFORMATION

<u>Maltreated/Abused Children</u>	<u>Allegation</u>	<u>Alleged Subject</u>	<u>SUB/UNSUB</u>
Collins,Patrick	Lacerations, Bruises, Welts	Collins,Thomas	Substantiated
Collins,Tyler	Inadequate Guardianship	Collins,Thomas	Substantiated
Collins,Kimberly	Inadequate Guardianship	Collins,Thomas	Substantiated
Collins,Patrick	Excessive Corporal Punishment	Collins,Thomas	Substantiated

SAFETY AND RISK INFORMATION

Safety Factors

Caretaker(s) is violent and appears out of control.
 Caretaker(s) likely caused serious physical harm to the child(ren) or has made a plausible threat of serious harm.

Safety Decision

One or more safety factors are present, however, these factors do not place a child in immediate danger of serious harm or the existence of family strengths, resources or other mitigating circumstances utilized prior to DSS involvement has effectively removed the threat of immediate danger for the child(ren).

Final Risk Rating

Moderate

Case & Stage: C: 22396148 S: 24673354 **Stage:** FSS **Type:** CWS
Start Date: 05/22/2008 **End Date:** **County:** 001 **Zone:** **Sensitive:** N

STAGE COMPOSITION

<u>Name</u>	<u>PID</u>	<u>DOB</u>	<u>Role</u>
Collins,Kristy	30796749	03/22/1975	Services Recipient
Collins,Patrick	30796235	04/22/1992	Services Recipient
Collins,Kimberly	30796236	08/16/2000	Services Recipient
Collins,Tyler	30796237	03/03/2007	Services Recipient
Collins,Thomas	30796234	11/24/1968	Services Recipient

CURRENT/LAST ASSIGNED WORKERS

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Role **Name** **Agency** **Phone Number**
 Case Manager Getnick,Ken Albany Co Dept Child Yoth& Fam (518) 447-7525

Case & Stage: C: 22395835 S: 24672990 **Stage:** FSS **Type:** CWS
Start Date: 05/16/2008 **End Date:** **County:** 001 **Zone:** **Sensitive:**

STAGE COMPOSITION

<u>Name</u>	<u>PID</u>	<u>DOB</u>	<u>Role</u>
Collins,Kristy	30796749	03/22/1975	Services Recipient
Collins,Patrick	30796235	04/22/1992	Services Recipient
Collins,Tyler	30796237	03/03/2007	Services Recipient
Collins,Kimberly	30796236	08/16/2000	Services Recipient
Collins,Thomas	30796234	11/24/1968	Services Recipient

CURRENT/LAST ASSIGNED WORKERS

Role **Name** **Agency** **Phone Number**
 Case Manager Getnick,Ken Albany Co Dept Child Yoth& Fam (518) 447-7525

SERVICES

<u>Child Name</u>	<u>Program Choice</u>	<u>End Date</u>	<u>PPG</u>	<u>End Date</u>
Collins,Thomas	Preventive Mandated		Prevent Return to Placement	

**Appendix B:
Closed Person Stage Involvement Report**

OFFICE OF CHILDREN AND FAMILY SERVICES
CONNECTIONS
CLOSED PERSON CASE/STAGE INVOLVEMENT

***** WARNING *****
CONFIDENTIAL INFORMATION
AUTHORIZED PERSONNEL ONLY

CLOSED PERSON NAME : Collins,Kristy
PERSON CLOSED ID : 30796232
PERSON FORWARD ID : 30796395

CLOSED PERSON INFORMATION AS OF 05/19/2008 (MERGE DATE) SPLIT DATE:

NAME SEX DOB ADDRESS CITY ST ZIP CTY CD
Collins,Kristy F 02/19/1977 109 FAYETTE BLVD SYRACUSE NY 13224-1127 O3I
PHONE: (315) 555-2424 EXT. ETHNICITY: RACE: White

CLOSED PERSON CASE/STAGE INVOLVEMENT:

<u>CASE ID</u>	<u>STAGE ID</u>	<u>STAGE</u>	<u>TYPE</u>	<u>JURISDICTION</u>		<u>DATE OPEN</u>	<u>DATE CLOSE</u>	<u>ROLE</u>	<u>RELATIONSHIP</u>
				<u>PRIMARY</u>	<u>SECONDARY</u>				
22395835	24672971	FSI	CWS	ALBA(OOL)	ALBA(OOL)	05/16/2008	05/16/2008	Services Applicant	Mother
22395835	24672990	FSS	CWS			05/16/2008		Services Recipient	Mother

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Appendix C: Maintain Education Business Function Guidelines

Business Function (BF)	Security Attributes	Description	Recommendations	Comments	Agency Access Considerations
MAINT EDUCATION	Enter Education	<ul style="list-style-type: none"> • MAINT Education BF works in conjunction with the Case Search (if Voluntary Agency) or the Case/ Pers Srch BF (if LDSS), i.e. the user must have both to access Education (without a role). • Path: Case Search > Case Summary->Options menu -> Stage Maint menu -> Maintain Education menu item (opens in Modify mode unless stage is pending closure). • The Maintain Education menu item on the Case Summary window will be enabled when: <ol style="list-style-type: none"> 1. Worker has the Business Function "MAINT EDUCATION" 2. Worker has selected an open FSS stage with stage type of CWS or CCR or ADVPO. 3. Worker is from the same district/local agency as one of the workers assigned to the stage (CM, CP, CW). • For stages pending closure, the worker with the MAINT EDUCATION BF will enter in browse mode only. • There is no access to closed stages with the MAINT EDUCATION BF. 	<p>It is recommended that a staff person who has responsibility for the entry of education information, but no other responsibility for the stage, should be given this Business Function.</p>	<ul style="list-style-type: none"> • The <i>district</i> of the case includes the district or agency of a worker with a role (CM, CP, CW). • Office Types: District / Voluntary Agency/ RO/ DJJOY (DFY) / CQC / OMH/ OMRDD • MAINT EDUCATION BF is not needed if the worker has a role in the stage. • There is no maintenance permitted of Education information once a stage is pending closure or closed. 	<p>When the district or agency uses the Agency Access Window settings, in order to prevent someone with the MAINT EDUCATION BF who is only intended to access Education Dialog from this path, from accessing events on the Case List window, the district or agency will need to take action make sure that all of these apply to the user. The user is: 1. not Case Assignable, 2. not a Unit Approver, 3. not in a Supervisory Unit in the Organizational Hierarchy and 4. does not have a Job Type.</p> <p>If this is done, and your Agency Access settings change, the user will still not be able to access events.</p> <p>Refer to the Guide to Using the Maintain Agency and Organizational Hierarchy Functions in CONNECTIONS and the CONNECTIONS Step-by-Step Guide: Security for more information.</p>