CONNECTIONS Build 18 Navigational Toolkit
The First Document

This document was designed as a navigational tool to assist users with common CONNECTIONS functionality.

For complete step-by-step documentation, refer to the CONNECTIONS Case Management Step-by-Step Guide located on the 'Step-by-Step/Job Aids/Tips' page of the CONNECTIONS Intranet site. Please note that these documents are not intended to replace any of the support tools that are currently being used by the field, but rather enhance and supplement current tools that are in use.

*If you have additional questions, please contact your CONNECTIONS Regional Implementation Staff. A listing of these staff is located on the 'Contact Us' page of the CONNECTIONS Intranet site (**http://ocfs.state.nyenet/connect/**)*

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Creating a Family Service Intake (FSI)

From the main *CONNECTIONS* Toolbar:
- Go to the **Intake** menu (top left)
- Click **Record Family Services Intake** (Ctrl+K) (***NOTE***: Before opening a new FSI, conduct a **Person Search** and/or **Case Search** (also from the main *CONNECTIONS* Toolbar) to see if there is any open case for the all individuals listed in the application.)

In the **Intake Source** tab:
- Record **Method** (**Time** and **Date** will pre-fill) (***NOTE:*** You may back-date up to 60 days if appropriate – please note that this will effect the ability to create a progress note with event date as the FSI intake date)
- In the **Source Information** section, enter the Source **Type** (drop down menu), **Sex**, **First** Name, and **Last** Name of the person making the referral are required to enable Save pushbutton
- In the **Address** section, enter the **Street**, **PO Box** and/or **Apt** number (if appropriate), **City**, and **Type** of the person making the referral. (***NOTE***: **Zip**, **County**, and **CD** (NYC only) will fill upon address validation) (***NOTE***: The source address is required to submit an FSI)
- Click the **Validate** button
- Click the **Accept** button (if correct)
- In the **Phone Information** section: enter **Phone**, **Ext**, and **Type** of the person making the referral
- Click **Save**

In the **Narrative** tab:
- Record **Type of Services being requested** (drop down menu)
- **Record the reasons for involvement with this family** in the narrative box provided
- Click **Save**. (***NOTE***: Once saved, the narrative cannot be modified. Additional narratives may be added.)
- Click on the **Behavioral Concern and Family Issues** (BCFI) button (bottom left)
- In **Child Issues** tab, check appropriate concerns/issues, provide the required narrative, and identify any critical concerns/issues that require emergency services. (***NOTE***: An additional **Emergency Services Required** button will enable if critical emergency concerns are identified. Complete the check list of emergency service and provide the narrative as instructed.)
- Repeat for **Caretaker Issues** and **Family Issues** tabs, if appropriate
- Click **Save**
- Click on the **Requested Services** button (bottom middle left)
- Check all appropriate requested services
- Click **Save**. (***NOTE***: A case can be marked sensitive by clicking the **Sensitive Case** button (if enabled), checking the **Sensitive Case** box, providing a narrative as appropriate, and clicking **Save**)

In the **Person Demographics** tab:

- Enter the applicants **First** Name, **Last** Name, **Sex**, and Date of Birth (**DOB**) (*NOTE*: Enter the primary caretaker's name first as this identifier will become the Case Name.)
- Click **Add Person** button (bottom middle) (*NOTE*: The person is now added to the bottom of the page.)
- When all individuals are entered, highlight each individual (bottom) by clicking the box to the left of the name
- Click **Search**, located on the bottom left of screen
- If the individual is *known* to *CONNECTIONS*, highlight the appropriate individual's name and click the **Relate** button (*NOTE*: This will add the individuals known demographics about this individual to the FSI) If the person is *unknown* to *CONNECTIONS*, click the **Cancel** button
- Highlight the name again to verify/modify/edit (i.e. Address) and/or add additional information (i.e. Social Security number). Click **Modify Person** button
- Address with **County** field populated is required in order for a voluntary to submit the FSI for LDSS Acceptance. The worker needs to select the County if the address does not validate or the County field does not populate when the address is validated
- Repeat for all individuals that will be part of Family Services case. Designate a County for an address, if in New York State, or select Out of State
- Click on the **Stage Maintenance** menu option at the top and complete the **Relationship Matrix**. (*NOTE*: FRM is not required to be completed in the FSI, it is required in the FSS)

In the **Decision Summary** tab:
- Answer the **Is this case being evaluated for Preventative Service ONLY** question and, if **Yes**, identify the Mandated Preventive Services to Client at Risk of Placement need(s)
- Enter the **Date application sent** and the **Date LDSS Received Application signed by Parent/Client** (*NOTE*: This date will become the Case Initiation Date (CID)) These CID trigger dates can be backdated six months if appropriate.
- In the **Decision** drop down menu, click **Open Family Services Stage** to open the case for services
- Click **Save**
- Click **Submit for LDSS Acceptance** button. (You will now receive the **Submit for LDSS Acceptance Successful. This action will close window. Do you want to continue?** prompt)
- Click <u>**Yes**</u>. (*NOTE*: *There is another step.* An **Assign** screen will appear.) (*NOTE:* If there is no County for the Persons Address(es) entered on the Person Demographic tab, after selecting yes, a worker from a voluntary agency will receive a message: **"No Case Assignable Staff in unit selected"**. When you click OK, the Family Services Assign window displays without a County pre-filled in the County and therefore there is no staff displayed in Available staff. User must return to Person Demographics and Modify the address(es) to populate the County field.)
- Highlight the name of the person you wish to submit the FSI to from the **Available Staff** list at the top
- Click the **Case <u>W</u>orker** button in the middle of the screen. (The only FSI role assigned is 'Case Worker')

- Click **<u>S</u>ave**. The FSI will no longer display on the workload. The LDSS can progress the FSI to an FSS

Creating a Child Case Record (CCR)/Finalizing an Adoption

WARNING: This is an order sensitive process. You must refer to the **Adoption Discharge and Finalization Checklist** posted to the CONNECTIONS website**: http://ocfs.state.nyenet/connect** for essential WMS/CCRS steps!

To create a Child Case Record (CCR), from the main *CONNECTIONS* Toolbar (***NOTE:*** A CCR should not be created until any Family Assessment and Service Plan (FASP) that has been launched is completed and approved.) (You can create the CCR when a FASP is pending as long as the Stage Composition consists of more than the child for whom the CCR is created.)

- Open Workload, highlight Case in question, and click **Tasks…**
- Go to the **Family Assessment and Service Plan Review** (FASP) tab
- Click on the **Tracked Children** button. (**NOTE:** the **Program Choice** would need to be designated as **Placement** in order for the **Placement Information** tab to be enabled.)
- By Changing the PPG to "Placement for Adoption" effective the date the child is freed, end dating existing PPG the date the child is freed; when the CCR is created and the PPG added- there is no break in PPG "Placement for Adoption"
- Go to the **Placement Information** tab
- In the **Select Child** section, highlight the name of the child for whom a CCR is to be created
- Enter the **Name of Discharge** Resource, if appropriate
- Check the **Completely Freed for Adoption (Creates Child Case Record)** check box
- Click **Save**
- You will receive a **Child's Name will end dated and a Child Case Record Created. Continue?** prompt, click **Yes**
- Click **Close** in the **Placement Information** tab. (**NOTE:** The child should no longer appear in the case name list in the **FASP** tab.)
- Click **Close** the **FASP** tab (**NOTE:** The child should no longer appear in the **Stage Composition** list.) The Program Choice and PPG for the child end dated in the CWS the date the CCR was created
- Click **Close**
- In the **Assigned Workload**, click the **Refresh** button
- A new CCR case should appear in the **Assigned Workload** in the child's name

To finalize an adoption, from the main *CONNECTIONS* Toolbar

- Open Workload, highlight Case in question, and click **Tasks…**
- Go to the **Options** drop down menu at the top of the **Family Services Stage** screen
- Click the **Finalize Adoption** option
- In the **Finalize Adoption** screen, go to the **Adoption Finalized Child Information** section
- Enter the child's new **Last Name** (Required, in yellow), **First Name** (Required, in yellow), and **Middle Name** (if appropriate)
- If the child's name is to remain the same, click the **Use Existing** button

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- Answer the **Will an adoption subsidy exist for this child?** question **Yes** or **No** If the response is **No proceed to the Address Information section**
- If the answer **Yes** is clicked, you must enter the **WMS Case ID** number and the **WMS CID** (Case Initiation Date)
- Go to the **Address Information** section
- Enter the child's new address information and click the **Validate** button
- If the child's address is to remain the same, click the **Use Existing** button
- Click **Save**
- You will receive a **Child has been finalized for adoption. Person ID = (Child's ID Number). Family Services Stage should be closed immediately** prompt, click **OK**
- Click **Cancel Finalize Adoption** screen
- Go to the **Case Summary** tab
- Go to the **Reason Stage Closed** drop down menu
- Click **Adoption Finalized - with** (or **without**) **Subsidy**
- Click the **Submit** button
- Answer the **Stage Close Question** as appropriate
- You will receive the **Closing this stage will close the case. Do you wish to continue?** prompt, click **Yes**
- You will receive the **This action will close this window. Do you want to continue?** prompt, click **Yes**
- In the To-Do Detail screen click **Save**
- You will receive the Case Manager submitted this approval. Approval To-do for Case Manager's Unit Approver. Do you wish to add another approver? prompt, click **Yes** or **No** as appropriate
- In the **Assigned Workload**, click the **Refresh** button
- To check the status of the case, click **Tasks…**.
- You will receive the **Stage is pending Closure. You will be entering in browse mode. Contact the approver.** prompt The CCR case should disappear from the **Assigned Workload** upon the approval of the approver

Cross County Cases/Umbrella Case Number: Linking Stages vs. Merging Cases

A **Cross County Case** is one where the family (caretaker and at least one child) received child welfare services in one county, has moved to another county and still requires ongoing child welfare services **OR,** some family members live in one county while others live in a different county *and* child welfare services are concurrently provided in both counties. *CONNECTIONS* accommodates cross county involvement by using the **Umbrella Case Number** with open stages in different counties. When a services case 'transfers' from one county to another, the open Family Services Stage (FSS) stage (and a Welfare Management System (WMS) case) must be closed in the original county and a new Family Service Intake (FSI) must be completed, stage progressed to an FSS, and opened in WMS in the new county. *If you don't need to open a WMS case, you can request that the Case Manager assign you a role as Case Worker in the open case.*

Program Guidelines to use when linking a stage to another case *or* merging two different cases

- Is this the same family? Is there at least one person, age 18 or older in common? Is the primary caretaker the same in both cases? If the answer is "yes" to all three questions, then you may proceed.
- Does this support continuity of casework through access to all information relevant to the children and family including progress notes, assessments and service plans? Remember; a child can only be tracked in one FSS stage.
- Use caution when linking or merging cases with multiple person(s) in the respective cases that may not be family members. (**NOTE:** If you have a person in common with another open case (with a *CONNECTIONS* Person Identification Number (PID)), you will have access to the information in that case whether or not the cases are linked.)

Rules for *Linking* a Family Service Intake (FSI) to a closed or active case

- Do not link an FSI to a closed FSI
- Do not link an FSI to another open FSI
- Do not link an FSI to another open FSS in the same district. An FSI can be linked to an open FSS in another district
- Do not link an FSI to an open or closed CPS/INT stage that has not been staged progressed to the CPS INV stage

From the FSI **Person Demographics** tab:
- Highlight the **Name** of the individual in the list at the bottom of the screen that is to be linked to another case
- Go to the **Stage Maintenance** drop down menu at the top of the **Person Demographics** screen
- Select the **Link This Stage to an Existing Case** option
- In the **Link This FSI Stage to Active or Closed Case Number** screen, select the Case to be linked
- Click the **Link to Case** button. You will receive an **Open FSI or FSS Stage in this District** prompt (**NOTE:** A link can be removed prior to stage progression by highlighting and clicking the **Remove Link** button.)

- Click **OK** (***NOTE:*** The Link Process is completed in real time within the FSI stage)

Rules for *Merging* Two Cases

- Cases should be merged chronologically by using the oldest case as the retained case (usually the case with the lower case number *except* in the 180 series denoting converted cases), more historical information on stage composition will exist and will not need to be re-entered.

- **In the same district**
    - An open FSS (CWS only) can be merged to a case with a closed FSS
    - Two open FSS cannot be merged; one must be closed (then it can be merged)

- **In different districts**

    - Two FSS stages of different stage types can be merged (CWS, OTI, COI, ADVPO)

    - An open FSS stage and a closed FSS stage can be merged

    - Two open FSS stages (each in separate local districts) can be merged to the same case

- A Child Case Record (CCR), whether open or closed, cannot be merged with *any* other stage.

From the main *CONNECTIONS* Toolbar (***NOTE:*** You must have CASE MERGE/SPLIT security to complete this task):
- Using the **Case Search** function, note the case numbers of the case to be retained and the case to be merged
- Open Workload, highlight the Case to be Merged To
- Go to the **Options** drop down menu (top of the screen) and select the **Case Summary** option
- In the **Case Summary** screen, go to the **Options** drop down menu and select the **Case Merge/Split** option
- In the Merged Cases From section, enter the **Case ID** number for the Case you wish to merge in the **ID** field
- Click **Validate** (***NOTE:*** If the merge is possible, the **Merge** button is enabled)
- Click **Merge** (***NOTE:*** The merge will display with a red check mark in the **Pending** column)
- Click **Save** (***NOTE:*** Process is completed as an overnight batch. The new case number appears the next day)

Maintaining (Multiple) Address and/or Telephone Information

In the **Family Service Intake** (FSI) stage, from the **Person Demographics** tab:
- Go to the **Stage Maintenance** drop down menu
- Select **Maintain Primary Address/Phone**

- If no **Primary Address Information** or **Primary Phone Information** has been entered:
  o   Enter primary **Street**, **City** and residence **Type** (drop down menu)
  o   Click the **Validate** button
  o   Click **Accept** if correct *or* **Reject** if incorrect
  o   The County field must be entered, either by the user or populated by accepting the address validation
  o   Enter the primary phone **Number**, **Extension** (if appropriate), and telephone **Type** (drop down menu)
  o   Holding the **Ctrl** key down, highlight the line(s) of the individual(s) to which you wish to add the address and phone information (*NOTE:* Lines will now be highlighted in brown)
  o   Click **Save** You should receive the **Changes Have Been Saved** prompt
  o   Click **OK**
  o   Click **Cancel** to return to the **Person Demographics** tab

- If **Primary Address Information** or **Primary Phone Information** has been entered:
  o   Right click on the **Name** of the individual you wish to use as a primary address and/or phone
  o   From the drop down menu, select **Use Primary Address**, **Use Primary Phone**, or **Use Both Address and Phone**
  o   At this point, you may modify the information as above *or* use the information as it appears in the fields
  o   Click the **Validate** button
  o   Click **Accept** if correct *or* **Reject** if incorrect
  o   The County field must be entered, either by the user or populated by accepting the address validation
  o   Holding the **Ctrl** key down, highlight the line(s) of the individual(s) to which you wish to add the address and phone information (*NOTE:* Lines will now be highlighted in brown)
  o   Click **Save** You should receive the **Changes Have Been Saved** prompt
  o   Click **OK**
  o   Click **Cancel** to return to the **Person Demographics** tab

In the **Family Service Stage** (FSS), from the **Stage Composition** tab:
- Go to the **Options** drop down menu
- Select **Maintain Primary Address/Phone**
- Right click on the **Name** of the individual you wish to use as a primary address and/or phone
- From the drop down menu, select **Use Primary Address**, **Use Primary Phone**, or **Use Both Address and Phone**
- At this point, you may modify the information as noted above *or* use the information as it appears in the fields

- Click the **Validate** button
- Click **Accept** if correct *or* **Reject** if incorrect
  - The County field must be entered, either by the user or populated by accepting the address validation.
- Holding the **Ctrl** key down, highlight the line(s) of the individual(s) to which you wish to add the address and phone information (*NOTE:* Lines will now be highlighted in brown.)
- Click **Save** You should receive the **Changes Have Been Saved** prompt
- Click **OK**
- Click **Cancel** to return to the **Stage Composition** tab

Office Search

(for finding Agency, Site, Unit, and Office Codes in *CONNECTIONS*)

From the main *CONNECTIONS* Toolbar:
- Go to **Search** (Above the large icons (**To Do**, **Work**, **Unit**….) you will find **Intake**, **Options**, **Maintain**, **Search**, and **Help**)
- Select **Office…** (Ctrl+O)

In the **Office Search Criteria** screen:
- Go to **Type** (drop down menu) and make a selection (**State**, **Regional**, **District**, **Vol Agen**, etc.)
- Under **Agency** if DSS is pre-filled, remove and leave blank
- Select **Region** (drop down menu)
- Select **County** (drop down menu)
- Click **Search** (This will give you the **Office List**)

In the **Office List** screen:
- Highlight the office of choice
- Click **Detail…** (This will give you the particular details of the office you highlighted including **Address/Phone**, **Agency** code, and **Office Site** code)

In the **Office Assignments** section (upper right: The individual names and phone numbers of the workers assigned to that office will be listed (*NOTE:* This information may not always be kept up to date):
- Highlight the Name of the worker of choice
- Click **Staff Dtl…** (This will give you the individual staff detail including **Address/Phone**, **Site** code, **Unit** code, **Role**, Supervisor (**Supv:**), and whether they are **Case Assignable**)
- **Cancel** and **Close** to return to the main *CONNECTIONS* Toolbar

Permanency Changes ('Removal' as per Build 18.7)

From the main *CONNECTIONS* Toolbar:
- Open Workload, highlight Case in question, and click **Tasks…**
- Go to the **Family Assessment and Service Plan** (FASP) tab, click **Tracked Children** button

In the **Program Choice/PPG** tab, to change the Program Choice and a Permanency Planning Goal (PPG):
- Highlight the appropriate child in the **Select Children** list
- Highlight the **Program Choice** you need to end date (if any) in the **Program Choice Information** section
- Enter the appropriate **End Date** and click **Modify**
- Enter a new **Program Choice** (drop down menu)
- Enter the appropriate **Effective Date** and click **Add**
- Highlight the **PPG** you need to end date (if any) in the **Permanency Planning Goal (PPG) Information** section
- Enter the appropriate **End Date** and click **Modify**
- Enter a new **PPG** (drop down menu) and **Subcategory** (drop down menu if highlighted in yellow)
- Enter the appropriate **Effective Date**, click **Add**, and click **Save**
- Repeat for all children involved with the Removal

In the **Removal Information** tab:
- Highlight the appropriate child in the **Select Child** list
- Enter the appropriate **Date of Physical Removal**
- Enter the **Type of Legal Event Associated with Removal** (drop down menu) and click **Save**
- Repeat for all children involved with the Removal and click **Close**

NOTE: If the **Next Permanency Hearing Date Certain** has been entered into CCRS that information may be viewed on this screen.

You will now be required to *either* launch and complete a Plan Amendment _OR_ record a Removal Update in a FASP that is either in process or able to be launched.

In the **Family Assessment and Service Plan** (FASP) screen, to record a **Removal Update** in a launched FASP:
- Click the **Removal Update** button (lower left)
- Click **Check Removal Detail** button
- Click and complete required components and click **Save**
- Recheck the **Check Removal Detail** button (*NOTE:* You do not have to complete the entire FASP to submit the Removal Update)
- If **The FASP Components listed below are not ready for submission** section is empty, click the enabled **Submit** button
- Click **Yes** to the **This action will close this window. Do you want to continue?** prompt

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- In the **To Do Data** screen, click **<u>S</u>ave** to finish submitting the Plan Amendment. (***NOTE:*** You may enter an additional approver if desired.)

<center>***OR***</center>

In the **Family Assessment and Service Plan** (FASP) screen, to record a Plan Amendment:
- Click **Launch New FASP** (drop down menu)
- Select **Plan Amendment**
- Click **Launch** (***NOTE:*** A Plan Amendment can be launched if an approved FASP has been recorded in *CONNECTIONS* and you are not in the launch window for the next FASP)
- Click on the words: "**Plan Amendment - In Process**"
- Highlight and add any required Plan Amendment components in the **Status Change** column on the left to the **Selected Status Changes** column on the right using the **>>** button (***NOTE:*** Use the **<<** button to delete) Click **Save**
- Click and complete added components and click **Save**
- Click **Check FASP Detail** button
- If **The FASP Components listed below are not ready for submission** section is empty, click the enabled **Submit** button
- Click **<u>Y</u>es** to the **This action will close this window. Do you want to continue?** prompt
- In the **To Do Data** screen, click **<u>S</u>ave** to finish submitting the Plan Amendment (***NOTE:*** You may enter an additional approver if desired.)

Completing the Programmatic Eligibility Tabs

To access the Programmatic Eligibility tabs, from the main *CONNECTIONS* Toolbar:
- Open Workload, highlight Case in question, and click **Tasks…**
- Go to the **Family Assessment and Service Plan** (FASP) tab
- If you have not already done so, you should always check the **Program Choices** and Permanency Planning Goals (**PPG**) for accuracy and then **Launch** the appropriate Initial, Comprehensive, or Reassessment FASP
- Click on the ⊞ button for the **FASP – In Process** from the FASP tree (left hand side of the FASP tab)
- Click on the **Programmatic Eligibility** line

For cases with a Program Choice of **Placement**:
- The **Placement** tab will show (*NOTE:* The **Preventive** tab is disabled.)
- Click on the name of the appropriate child form the **Placed Children** drop down menu
- Select the appropriate choice from the **(Continuing) Need for placement services** list
- Provide a narrative describing relevant behaviors or circumstances of your selection in the yellow field. These narratives do not copy, you must enter a narrative for each child
- Click **Save**
- If you wish to copy information to additional children in the case:
  o Click the **Copy** button
  o Check the names of the children you wish to copy information for in the **Copy to Other Children** screen
  o Click **Save**
- Provide a narrative describing relevant behaviors or circumstances of each child in placement in the yellow field. These narratives do not copy, you must enter a narrative for each child
  o Click **Cancel**

For cases with a Program Choice of **Preventive**:
- The **Preventive** tab will show (*NOTE:* The **Placement** tab is disabled.)
- If you choose the **(Continuing) Need for Mandated Preventive Services to Clients at Risk of Placement** check list, you must select *at least one* of the following Eligibility Standards (you may select as many as apply): Health and Safety of Child, Parental Refusal or Surrender, Parent Service Needs, Child Service Needs, Pregnancy, Parent Unavailability, Diagnostic Evaluation, and/or Court-Ordered Placement
- If you choose the **(Continuing) Need for Mandated Preventive Services to Prevent Replacemen**t check list, you must select at *least one* of the following Eligibility Standards (you may select as many as apply): Health and Safety of Child, Parental Refusal, Parent Unavailability, Parent Service Needs, Child Service Needs, Pregnancy, Family Court Contact, and /or Unplanned Discharge
- If you choose the **(Continuing) Need for Mandated Preventive Services to Hasten Discharge to Parent or Caretaker** sub-list, you must select *all* of the sub-criteria that appear in this sub-list:

- - Preventive Services Other Than Housing:
    - Service Appropriate to Reason for Care
    - Discharge Planned within Six Months
    - Safe and Appropriate Plan for Discharge
  - Preventative Housing Services:
    - Housing is the Primary Factor Preventing Discharge
    - Discharge is Planned Within Two Months
    - Safe and Appropriate Plan for Discharge
  - Preventive Services For Children Placed in Designated Emergency Foster Boarding Homes
    - Discharge Planned Within 60 Days
- If you choose the **(Continuing) Need for Housing Services for Clients with a Goal of Discharge to Independent Living** check list, you must mark *all* four of the following Eligibility Standards:
  - Housing Services Necessary and Authorized
  - Youth has been in care for at least 90 days
  - Youth is prepared for Independent Living and Housing is Necessary for Discharge
  - Discharge Planned Within 60 Days
- Provide a narrative describing the relevant behaviors and/or circumstances that support your selection(s) in the yellow field
- Click **Save**

"Progress Notes 101"

(Viewing/Printing more than 400 notes; Filling the Family/Child Visiting Grid; Type Definitions)

The default sort of the Progress Notes List is descending order by Event date (most recent Event date is on top). When printed, progress notes will print is ascending order by Event date (oldest on top, within the 'page' of progress notes).

If over 200 notes progress notes exist in case, the user needs to use the Pagination buttons to view and print all notes. Select All, then Print Notes, select the print format of the print, either Data fields and narrative or Data Fields only. Click OK. The Print Preview window displays all notes that were selected. Then select the Print pushbutton. Report Generated pop up, Print Queued. Click OK. Users should consider filtering the notes using the fields provided on the Progress Notes tab, then select the Search pushbutton.

From the main *CONNECTIONS* Toolbar:
- Open Workload, highlight Stage in, and click **Tasks…**
- Go to the **Progress Note** tab
- In the **Search Progress Note** section, enter the **From Event Date**
- Enter the **To Event Date** to include the event date of the desired new note
- Click **Search**

To print large volumes of notes, users should consider printing in thirty-day increments by redefining the search criteria (*See above*). Check that the last entry contains all notes entered on the last date in the selected range. Once printed, enter a new thirty-day range of dates beginning with the day following the previous date range. Continue until all notes are printed.

If required by local policy, it will be necessary to enter a Progress Note as one of the three visitation types to assure that the **Family/Child Visiting Grid** in the **Foster Care Issues** portion of the FASP is complete.

In the **Progress Note** tab:
- Click **New Note** button
- In the **Type** drop down menu (yellow), select the Type of visitation

(**NOTE:** If the caseworker was present at the visit, it may be appropriate to select Case Work Contact also. A dropdown menu with │ **…** │ in lieu of an arrow may have more than one entry. Multiple Progress Notes entered with the same Event Date and no event time display in random order when the user searches on that Event Date within the Progress Notes window. Enter approximate times for each entry to create the preferred display order.)

- Complete the remainder of the Progress Note as appropriate to the visit
- Click **Save as Draft** or **Save as Final** (The visitation information will now be listed in the FASP **Family/ Child Visiting Grid**.)

Definitions of Progress Note Types

Attempted Casework Contact: Select when a contact was initiated, but unsuccessful, i.e. client was unavailable at the attempted time.

Attempted Family Visitation: Select when a visit was planned between a child in foster care or with relatives and his or her family members, but was unsuccessful, i.e. family member did not appear at the arranged date/time.

Attempted Sibling Visitation: Select when a visit was planned between a child in foster care or with relatives and his or her sibling(s), but was unsuccessful, i.e. sibling(s) were ill.

Case Conference: Select for service plan reviews and any other meetings involving case members, district/agency staff and/or service providers.

Casework Contact: Select for a contact made with a member of the case; note if method is 'face-to-face' then either a 'participant' or 'other participant' is required.

Collateral Contact: Select for a contact with a non-case member.

Court: Select to record narrative concerning court related activities or events.

Family/Primary Discharge Resource Visitation: Select when recording information regarding a visit made between a foster child and one or more family members, regardless of whether caseworker was present; note at least two 'participants' must be selected, or one 'participant' and an 'other participant' of 'relative'.

Sibling Visitation: Select when recording information regarding a visit made between siblings, when at least one sibling is in foster care or with relatives and others live at home or in a different foster care facility regardless of whether caseworker was present.

Other Visitation: Select when recording information regarding any other type of visit that does not fall into the Types noted above regardless of whether caseworker was present.

Summary: Select when a series of contacts is being recorded in summary fashion, across a date range for a specific purpose, such as a report to the court or other agency; note no other types may be selected when choosing 'summary'.

Supervisor/Managerial Review: Selection provided for a supervisor or manager to annotate the progress note recorded that a review of a specified group of contacts has occurred.

Notice/Approval: Selection provided for districts with higher level of edits.

"Progress Notes 102"

(Viewing/Printing Notes; Auto-Save Feature; Family/Child Visiting Grid; Note Type Definitions)

In the main **Progress Note** tab, notes are sorted and viewed from the newest to the oldest. Additionally, notes will be sorted in order by event date and event time, if recorded, when they are retrieved from the database. Otherwise, notes will be sorted by the date and time of entry. Notes will continue to be printed from the oldest to the newest.

If a *CONNECTIONS* user is disconnected from the application the *Auto-Save* feature will save narrative text. (**NOTE:** If the user has been in the field less than 3 minutes, the *Auto-Save* is not activated.) The *Auto-Save* feature is available for text fields that have the text tool (tool bar with formatting buttons). It is not available for all text fields.
- When the user completes the data section in the recovered narrative, the **Save** button is enabled. If, however, the data fields have not been completed, the one enabled button will now be the **Cancel** button
- If the user clicks **Cancel,** they will receive the **Do you want to Cancel? Unsaved data and or narrative(s) will be lost** prompt
  - Clicking **Yes** discards the recovered narrative
  - Clicking **No** gives the user the opportunity to complete the data section, which enables the **Save** button to save the progress note

If required by local policy, it will be necessary to enter a Progress Note as one of the three visitation types to assure that the **Family/Child Visiting Grid** in the **Foster Care Issues** portion of the FASP is complete.

In the **Progress Note** tab:
- Click **New Note** button
- In the **Type** drop down menu (yellow), select the Type of visitation
(**NOTE:** If the caseworker was present at the visit, it may be appropriate to select Case Work Contact also. A dropdown menu with … in lieu of an arrow may have more than one entry. Multiple Progress Notes entered with the same Event Date and no event time display in random order when the user searches on that Event Date within the Progress Notes window. Enter approximate times for each entry to create the preferred display order.)
- Complete the remainder of the Progress Note as appropriate to the visit
- Click **Save as Draft** or **Save as Final** (The visitation information will now be listed in the FASP **Family/ Child Visiting Grid**)

Definitions of Progress Note Types

Attempted Casework Contact: Select when a contact was initiated, but unsuccessful, i.e. client was unavailable at the attempted time.
Attempted Family Visitation: Select when a visit was planned between a child in foster care or with relatives and his or her family members, but was unsuccessful, i.e. family member did not appear at the arranged date/time.

Attempted Sibling Visitation: Select when a visit was planned between a child in foster care or with relatives and his or her sibling(s), but was unsuccessful, i.e. sibling(s) were ill.

Case Conference: Select for service plan reviews and any other meetings involving case members, district/agency staff and/or service providers.

Casework Contact: Select for a contact made with a member of the case; note if method is 'face-to-face' then either a 'participant' or 'other participant' is required.

Collateral Contact: Select for a contact with a non-case member.

Court: Select to record narrative concerning court related activities or events.

Family/Primary Discharge Resource Visitation: Select when recording information regarding a visit made between a foster child and one or more family members, regardless of whether caseworker was present; note at least two 'participants' must be selected, or one 'participant' and an 'other participant' of 'relative'.

Sibling Visitation: Select when recording information regarding a visit made between siblings, when at least one sibling is in foster care or with relatives and others live at home or in a different foster care facility regardless of whether caseworker was present.

Other Visitation: Select when recording information regarding any other type of visit that does not fall into the Types noted above regardless of whether caseworker was present.

Summary: Select when a series of contacts is being recorded in summary fashion, across a date range for a specific purpose, such as a report to the court or other agency; note no other types may be selected when choosing 'summary'.

Supervisor/Managerial Review: Selection provided for a supervisor or manager to annotate the progress note recorded that a review of a specified group of contacts has occurred.

Notice/Approval: Selection provided for districts with higher level of edits.

Scheduling Service Plan Review (SPR)

From the main *CONNECTIONS* Toolbar:
- Open Workload, highlight Case in question, and click **Tasks…**
- Go to the **Service Plan Review** tab
- In the **Select FASP** section, highlight appropriate Family Assessment and Service Plan (FASP) and click **New** button

To avoid scheduling multiple Service Plan Reviews *(or you need to review what you have accomplished)*
- After each **Save**, click **Close**
- Highlight the FASP in the **Select FASP** section
- Highlight the new SPR in the **SPR Activity for Selected FASP** section
- Click **SPR Details** button to return to the **Persons** tab

In the **Persons** tab:
- Highlight appropriate person(s) in **Stage Composition** section
- Click **Add to Invitees**
- Continue until complete (***NOTE:*** Check the **Family Relationship Matrix** to assure that it is complete)
- Highlight appropriate worker(s) in **Workers** section
- Click **Add to Invitees**
- Continue until complete
- Highlight appropriate participants(s) in **Outside Participants** section
- Click **Add to Invitees**
- Continue until complete
- Click **Save**

If you wish to add new outside participants, the **Add Outside Participants** button will enable after you click **Save** and return to the **Persons** tab. To accomplish this task:
- Click **Add Outside Participants**
- Fill in highlighted (yellow) fields (**SPR Role** is a dropdown box)
- Enter and **Validate** address
- Enter other information as appropriate
- Click **Add** (You can **Cancel** or **Delete** this entry before you **Save**)
- Click **Save**
- Repeat for additional outside participants to be added as needed

In the **Service Plan Review (SPR) Scheduling** tab:
- Enter **Date**, **Time**, **Contact**, **Location Name**, **Room Number**, **and Floor Number** as appropriate
- Enter and **Validate** address
- Click **Save** (Use printer icon in the upper left hand corner) (***NOTE:*** Be sure to click on the **Persons** tab to proceed to the next step)

In the **Persons** tab for **Stage Composition Invitees** *and* for **Stage Outside Participant Invitees**:
- Highlight **Invitee**

- Use **Notification** dropdown menu (Toolbar in **Service Plan Review Details** screen)
- Click **Generate Letters**
- Print letter (*NOTE:* that **Method** and **Date** will now appear in the **Service Plan Review Invitees** box)

In the **Persons** tab for **Worker(s) Invitees**:
- Highlight **Invitee**
- Use **Notification** dropdown box (Toolbar in **Service Plan Review Details** screen)
- Click **Generate Alert**
- An *Alert* will now be sent to (all) Worker(s) To Do list (*NOTE:* **Method** and **Date** now appear in the **Service Plan Review Invitees** section)

If you need to delete an **Invitee**:
- Highlight **Invitee** in **Service Plan Review Details**
- Click **Delete**
- Click **Save**

Creating a Family/Child Visiting Plan

To access the Family/Child Visiting Plan, from the main *CONNECTIONS* Toolbar:
- Open Workload, highlight Case in question, and click **Tasks…**
- Go to the **Family Assessment and Service Plan** (FASP) tab
- If you have not already done so, check for correct **Program Choices** and Permanency Planning Goals (**PPG**) and **Launch** the appropriate Initial, Comprehensive, or Reassessment FASP
- Click on the ⊞ button for the **FASP – In Process** from the FASP tree (left hand side of the FASP tab)
- Click on the ⊞ button for the **Foster Care Issues In Process** line
- Click on the **Family/Child Visiting Plan** line
- Click on the **Visiting Plan** tab (*NOTE:* The Child Case Record (CCR) **Visiting Plan** will not have a **Select Adult(s) for Visiting Plan** section. There is no **Visiting Plan Review** tab in the Initial FASP.)

To *add* a Visiting Plan, from the **Visiting Plan** tab:
- Click the **Add Visiting Plan** button
- In the **Select Child(ren) for Visiting Plan** and **Select Adult(s) for Visiting Plan**, and **Select Outside Participant** sections, check the names of the participants to be added to the visiting plan
- To add an additional outside participant *or* modify an existing outside participant:
  - Click the **Add Outside Participant** button
  - For a *new* participant, enter **First Name**, **Last Name** and select a **Relationship** from the drop down menu (**NOTE:** It may be appropriate to add other information (i.e. **Participant Address** (should **Validate** to proceed) and **Phone**)
  - Click **Add**
  - For a *listed* participant, highlight the name the **Participant Name** in the **Outside Participants** list, select a **Relationship** from the drop down menu (*NOTE:* This field must be filled to be considered for the Visitation Plan. Select **NONE** if no relationship exists.) or modify other information as appropriate
  - Click **Modify**
  - Click **Save**
  - Click **Close**
- Using the dropdown menus at the right, fill in the appropriate information for **Plan Description**, **Primary Location**, **Frequency**, **Duration**, and **Visiting Plan Status**
- Provide a narrative describing what is expected to occur during visits in the yellow space provided
- Answer **Is assistance necessary to facilitate visitation?**, **Yes** or **No** (*NOTE:* If you answer **Yes**, provide a narrative describing what and how assistance is to be rendered in the yellow field provided.)
- Answer **Are there any special conditions regarding visitation?**, **Yes** or **No** (*NOTE:* If you answer **Yes**, provide a narrative explaining the special conditions in the yellow field provided.)

- To provide more information, click the **Visiting Plan Detail** button and use the narrative field provided
- Click **Save**

To *modify* a current Visiting Plan, from the **Visiting Plan** tab:
- Highlight the Visiting Plan to be modified
- Change or update any information as noted above (*NOTE:* If wish to suspend or close a Visiting Plan, use the **Visiting Plan Status** drop down box and click the appropriate response.)
- Click **Save**

For any child *without* a Visiting Plan, from the **No Visiting Plan** tab:
- Provide a narrative explaining why there is no active Visiting Plan *or* if the child has contact but does not visit, a narrative describing the nature of the contact (*NOTE:* If there is an active Visiting Plan, it is required that **N/A** be entered in **No Visiting Plan** field to facilitate successful submission of the FASP.)
- Click **Save**

To *complete* a Visiting Plan Review, from the **Visiting Plan Review** tab:
- Highlight the Visiting Plan to be reviewed.
- Select the degree of parental/visitor compliance, rate the parental/visitor behaviors using the drop down menu, and answer **Were the expectations of the previous visitation plan met?**, **Yes** or **No** (*NOTE:* If you answer **No**, explain the unmet expectations and why they were not met in the yellow field provided.
- Click **Save**