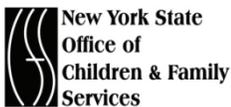


CONNECTIONS

**Introducing the Investigation
Stage Summary and Transformed
Investigation Windows**

Build Job Aid

v1.0 (04/08/2014)



Acknowledgement

This material was developed by the Professional Development Program, Rockefeller College, University at Albany, through The Research Foundation for the State University of New York, under a training and administrative services agreement with the New York State Office of Children and Family Services.

Disclaimer

While every effort has been made to provide accurate and complete information, the Office of Children and Family Services and the State of New York assume no responsibility for any errors or omissions in the information provided herein and make no representations or warranties about the suitability of the information contained here for any purpose. All information and documents are provided "as is," without a warranty of any kind.

Copyright

Copyright © 2014 by The New York State Office of Children and Family Services.

Introducing the Investigation Stage Summary and Transformed Investigation Windows

Build Job Aid

TABLE OF CONTENTS

Introduction to the Investigation Stage Summary and Transformed Investigation Windows	1
Introduction	1
What's Changing.....	1
The Stage Progression Window	2
Accessing the Stage Progression Window	2
Identifying the Stage Progression Window Components	2
Changes to the Stage Progression Window	3
Drop-down Fields	3
Buttons	3
The Safety Assessments Window	4
Accessing the Safety Assessments Window in Modify Mode	4
Accessing the Safety Assessments Window in View-Only Mode	4
Identifying the Safety Assessments Window Components	5
Changes to the Safety Assessments Window	6
Completing the Window	6
Navigating from the Window	6
Creating a New Safety Assessment.....	6
Saving the Safety Assessment	7
Submitting for Approval.....	7
The Risk Assessment Profile Window	8
Accessing the Risk Assessment Profile Window in Modify Mode.....	8
Accessing the Risk Assessment Profile Window in View-Only Mode	8
Identifying the Risk Assessment Profile Window Components.....	9
Changes to the Risk Assessment Profile Window	9
Completing the Window	9
Saving and Submitting	10
The Elevated Risk Window	10
The Case Level RAP Information Window.....	11
Changes to the Case Level RAP Information Window.....	11
The Progress Notes Window	12
Accessing the Progress Notes Window from the My Workload Tab.....	12
Accessing the Progress Notes Window from the My To-Dos Tab	12
Accessing the Progress Notes Window in View-Only Mode	12
Identifying the Progress Notes Window Components.....	13
Viewing/Modifying Existing Progress Notes.....	14
Recording a New Progress Note	14
Changes to the Progress Notes Window	15
Searching for Progress Notes	15
Adjusting the Display of Progress Notes.....	15

Recording and Saving Progress Notes	15
Deleting and Printing Progress Notes	15
Creating Progress Note To-Dos	15
The Type, Other Participants, and Purpose Windows	16
Changes to the Type, Other Participant, and Purpose Windows	16
The Print Notes Window	16
Accessing the Print Notes Window	16
Identifying the Print Notes Window Components	17
Changes to the Print Notes Window	17
The Copy Note Window	17
Accessing the Copy Note Window	17
Identifying the Copy Note Window Components	18
Changes to the Copy Note Window	18
The CPS Investigation Conclusion Window	19
Accessing the CPS Investigation Conclusion Window in Modify Mode	19
Accessing the CPS Investigation Conclusion Window in View-Only Mode	19
Identifying the CPS Investigation Conclusion Window Components	20
Changes to the CPS Investigation Conclusion Window	20
The New Sub-Classification Field	20
Track Switching from INV to FAR	21
Switching Tracks from INV to FAR	21
Track Switching Requirements	22
Track Switching Warnings	22
Display of the New FAR Stage	22
After the Track Switch	23
The New Stage Summary Window	25
Accessing the Stage Summary Window Through a Case Search	25
Accessing the Stage Summary Window from the My Workload Tab	26
Accessing the Stage Summary Window from an Approval To-Do	26
Identifying the Stage Summary Window Components	27
Stage Summary Overview	27
Corresponding CPRS Elements	27
Events	28
Supervisors	28
Local Protocol	28
The Generate Report Window	29
Accessing the Generate Report Window from the My Workload Tab	29
Accessing the Generate Report Window from the Stage Summary Window	29
Identifying the Generate Report Window Components	30
Changes to the Generate Report Window	30
Resources	31
OCFS Intranet Site: CONNECTIONS Help/Training	31
CONNECTIONS Regional Implementation Staff	31
Application Help Mailbox	31
NYS OFT Customer Care Center	31
Professional Development Program	32

Introduction to the Investigation Stage Summary and Transformed Investigation Windows

Introduction

This Job Aid is intended for workers who have a role in or review Investigation (INV) stages, including services workers viewing INV stages via an implied role (a worker who is assigned to a stage has an implied role in another stage if there is a person in common between the stages). It provides a detailed overview of the CONNECTIONS system changes being introduced with the *Stage Summary* window, and step-by-step instructions related to INV stages.

Although changes are being made to many of the INV stage windows, many factors are not changing. Safety Assessments, the Risk Assessment Profile, and Progress Notes will continue to be available through corresponding links on the **NAVIGATION PANE** of the **My Workload** tab; the security and content of these windows is not changing. In addition, due dates for Safety Assessments and the Risk Assessment Profile (RAP) will remain the same, and progress notes will continue to remain in “Draft” status for 20 calendar days before they are automatically marked as “Final.”

What’s Changing

Upon the implementation of this Build, several of the INV stage windows will be modified:

- The *Safety Assessment*, *Risk Assessment Profile*, and *Progress Notes* windows will be converted into separate windows that will be accessed individually from the **NAVIGATION PANE** of the **My Workload** tab, similar to how other INV windows are accessed.
- The **CPRS** link will no longer be available.
- A new “Stage Summary” event will replace the “Child Protective Record Summary” event and will provide view-only access to specific stage actions for INV stages (i.e., Case Summary, Review Intake, High Priority Factors (NYC only), Allegations, Investigation Actions, Safety Assessments, Risk Assessment, Progress Notes, Local Protocol, and Investigation Conclusion).
- The *CPS Investigation Conclusion* window will have a **Sub-Classification** drop-down field, which will display only for Foster Care/Day Care investigations and must be completed before the Investigation Conclusion can be submitted for approval.
- Stages with a sub-classification of “Foster Care” will require a Safety Assessment and Risk Assessment Profile.

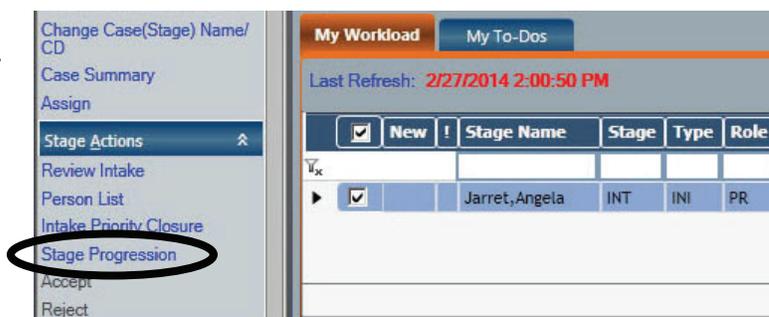
The Stage Progression Window

Upon implementation of this Build, for FAR-participating districts, the *Stage Progression* window will have an additional drop-down menu that you can use to specify whether you are stage progressing the CPS Intake to an Investigation (INV) or a Family Assessment Response (FAR).

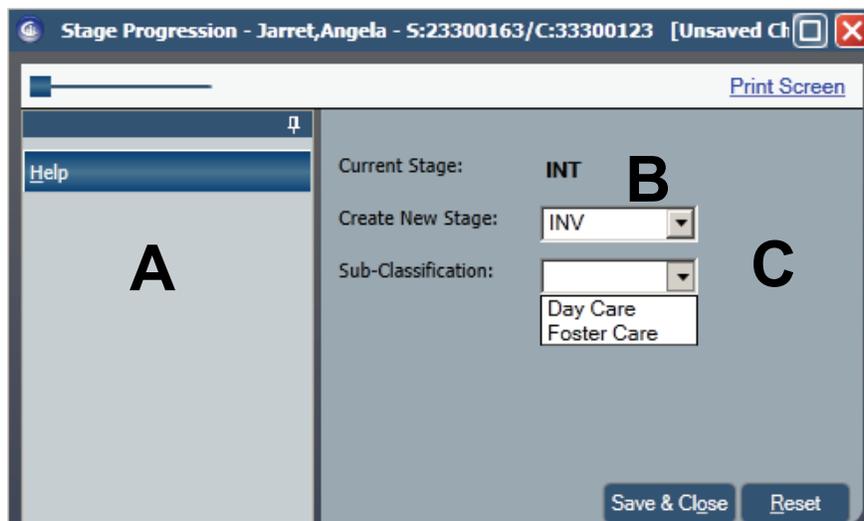
For Foster Care/Day Care investigations, there will also be a new drop-down field to record the sub-classification of the stage (“Foster Care” or “Day Care”). Intakes with a sub-classification of “Foster Care” can be progressed to FAR stages, if appropriate; those with a sub-classification of “Day Care” cannot.

Accessing the Stage Progression Window

- 1 From the **My Workload** tab, select the appropriate stage. The **Stage Actions** section displays on the **NAVIGATION PANE**.
- 2 Click on the **Stage Progression** link on the **NAVIGATION PANE**. The **Stage Progression** window displays.



Identifying the Stage Progression Window Components



- (A) **NAVIGATION PANE** – The **NAVIGATION PANE** will contain the **Help** section, which you can use to access Online Help.
- (B) **Current Stage Field** – The **Current Stage** field will display the current stage of service.
- (C) **Drop-down Fields** – The drop-down fields will allow you to select the new stage of service and a sub-classification for the stage. The FAR sub-classification will only appear for workers in FAR participating counties.

Changes to the Stage Progression Window

Drop-down Fields

- The **Create New Stage** drop-down field will only be modifiable if your county is participating in FAR. If not, the drop-down will be set to “INV” by default and you will not be able to modify it.
- The **Sub-Classification** drop-down field will only display if the Intake stage has a classification of “Foster Care/Day Care”.
- The **Sub-Classification** field is not required to stage progress for INV stages; however, it is required in order to submit the Investigation Conclusion for approval.
- If you select “Foster Care” from the **Sub-Classification** drop-down field, Task To-Dos for Safety Assessments and the RAP will be created upon stage progression. If the drop-down is left blank or you select “Day Care,” no Task To-Dos will be created for Safety Assessments or the RAP.

Buttons

- The **Save & Close** button will be disabled when the **Create New Stage** field is blank.
- The **Reset** button will only display if your county participates in FAR, or if the **Sub-Classification** drop-down field is displayed on the window.

The Safety Assessments Window

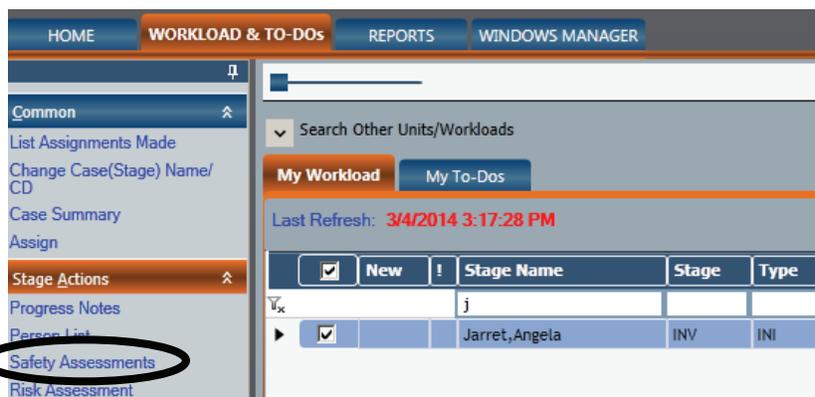
Upon Build implementation, the *Safety Assessments* window for both new and existing stages will have the same look and feel as other transformed windows. The layout will include a **NAVIGATION PANE**, selection grid, and tabs that correspond to the Safety Assessment sections. Security for this window will not change. There are two methods of navigating to the new window:

- via the **My Workload** tab for modify mode
- via the *Stage Summary* window for view-only mode

Accessing the Safety Assessments Window in Modify Mode

1 On the **My Workload** tab, select the appropriate INV stage.

2 Click the **Safety Assessments** link on the **NAVIGATION PANE**.
The Safety Assessments window displays.



Accessing the Safety Assessments Window in View-Only Mode

1 On the **My Workload** tab, select the appropriate INV stage.

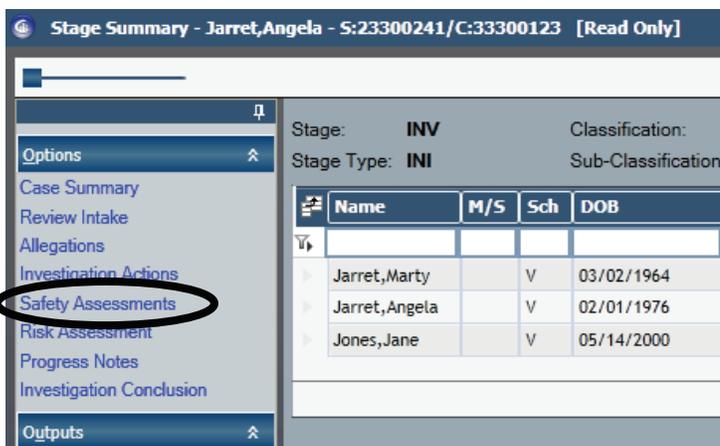
2 Click the **Stage Events** tab.

3 Filter for “Stage Summary” in the **Description** column.

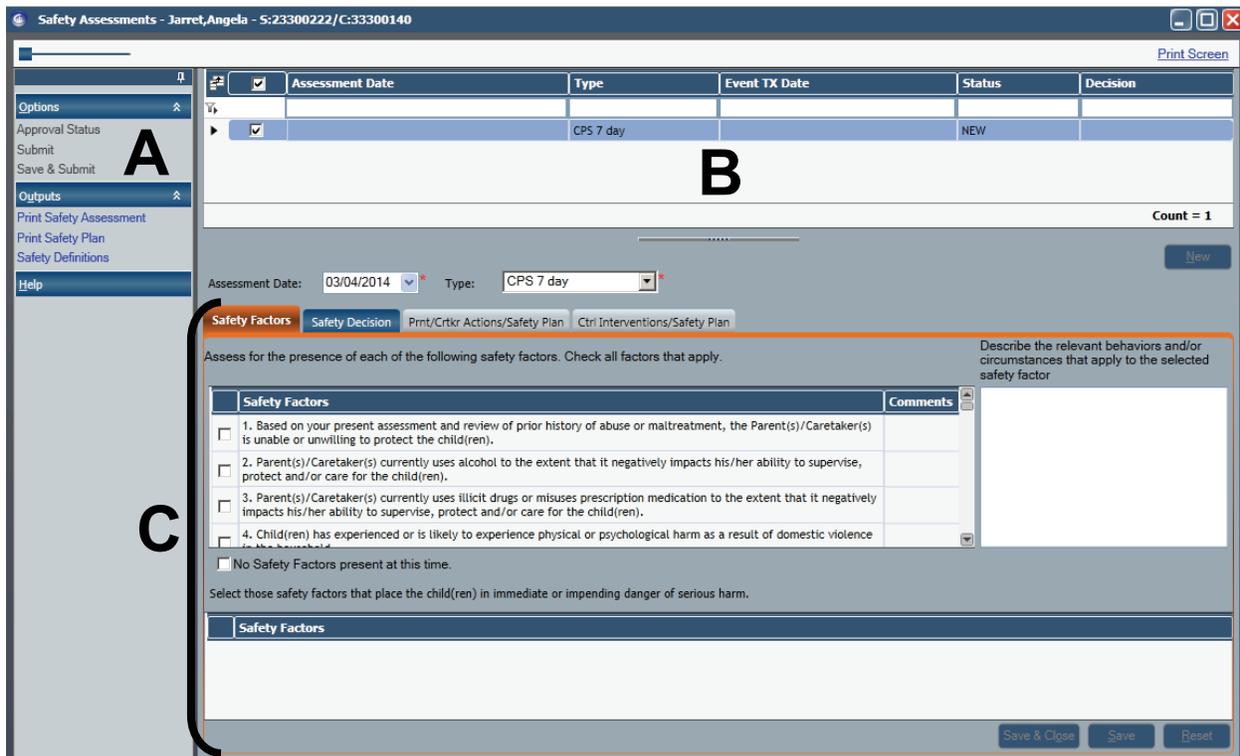
4 Select the Stage Summary event.

5 Click the **Detail** link on the **NAVIGATION PANE**.
The Stage Summary window displays.

6 Click the **Safety Assessments** link on the **NAVIGATION PANE**.
The Safety Assessments <Case Name – Stage ID/Case ID> [Read Only] window displays.



Identifying the Safety Assessments Window Components



(A) **NAVIGATION PANE** – The **NAVIGATION PANE** will contain several sections with links that provide access to Safety Assessment tasks:

Options This section will display links for reviewing the status of a previously submitted Safety Assessment, submitting a completed Safety Assessment, and saving and submitting a Safety Assessment.

Safety Decision Options This section will only display when the **Safety Decision** tab is active. It contains the **Placement** link, which displays the *Placement* window.

Outputs This section will contain the **Print Safety Assessment**, **Print Safety Plan**, and **Safety Definition** links that will open the corresponding document in a form viewer window for printing.

(B) **Safety Assessments Grid** – The **Safety Assessments** grid will populate with details of existing Safety Assessments including the assessment date, type of Safety Assessment, event transaction date, status, and decision. By default, the grid displays up to three Safety Assessments; however, it may be expanded to show additional Safety Assessments. Double-clicking the grid separator will expand the grid and display all rows. Selecting a record on the **Safety Assessments** grid will display the assessment on the tabs below.

(C) **Safety Assessment Tabs** – The Safety Assessment tabs will display the details of the selected Safety Assessment for viewing or modifying.

Changes to the Safety Assessments Window

Completing the Window

- If an invalid date is recorded in the **Date** field, you will still receive a warning message instructing you to correct it. You can continue to record narratives and other information before you correct the date. However, that information will be deleted if you click the **Reset** button before you correct and save the date.
- The **Type** drop-down field must have a value in order to save (and submit) a Safety Assessment.
- Required components of the Safety Assessment will display a red asterisk instead of yellow highlighting. For required comments, the asterisk will appear at the end of the text above the comments field.
- The **Safety Factors** grid will display a red checkmark in the **Comments** column after you have recorded a comment.
- Instead of a **Spell Check** button, misspelled words will be underlined in red within the comment fields. You can right-click the underlined word to open a list of suggested replacement words.
- The **Complete?** button will no longer display on the window.
- The *Safety Assessment* window will have a **Reset** button, which will undo any unsaved changes made to that window and the *Placement* window, as well.

Navigating from the Window

- The *Placement* window will be accessed through a link of the same name in the **Safety Decision Options** section of the **NAVIGATION PANE**. (This section will only display when the **Safety Decision** tab is the active tab.)
- The Safety Definitions will be accessible via a **Safety Definitions** link in the **Outputs** section of the **NAVIGATION PANE** instead of the current light bulb button, which will no longer display.
- A **To Do** button will no longer display for the Safety Assessment; Safety Assessment To-Dos can no longer be created.

Creating a New Safety Assessment

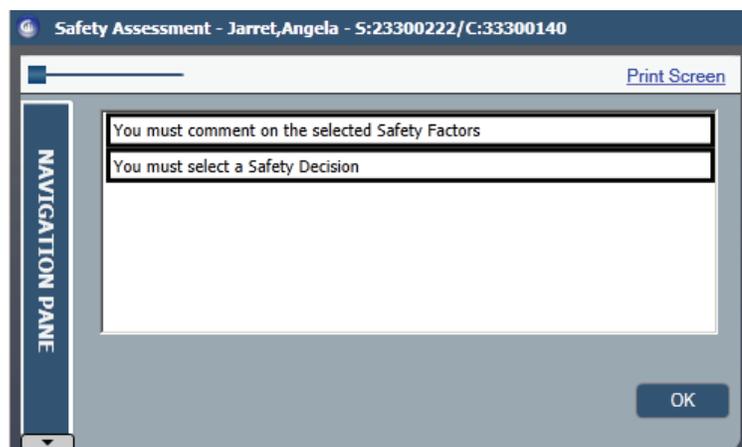
- The **New** button will only display on the *Safety Assessment* window when you access the window in modify mode; it will not be present when accessing the *Safety Assessment* window through the *Stage Summary* window.
- When an INV stage is pending closure, and you attempt to create a new Safety Assessment, you will still receive the error message: “*Cannot start safety – the stage is pending closure.*” However, clicking the **OK** button on the error message will no longer open the Safety Assessment in view-only mode; you will instead remain on the current *Safety Assessment* window.

Saving the Safety Assessment

- Changes that you make to a **Safety Factors** tab must be either saved or discarded before you can navigate to another tab.
- Saving information using the **Save** button on the window will no longer close the *Safety Assessment* window; a **Save & Close** button will save any changes and close the window.
- When the *Safety Assessment* window contains invalid data (such as a future date in the **Date** field), the **Save** and **Save & Close** buttons will be disabled.

Submitting for Approval

- Safety Assessments will be submitted for approval using links on the **NAVIGATION PANE** rather than buttons on the window.
- When you click the **Submit** or **Save & Submit** link, which are always enabled, a pop-up window will display a list of any incomplete, required components. The components listed are *not* navigable links.
- When you submit a Safety Assessment for approval, once you save the *To-Do Detail* window you will be returned to the **My Workload** tab.
- When a Safety Assessment is pending approval and you select it from the **Safety Assessment** grid, the following warning message displays: “*Saving will invalidate all pending approvals, Continue in modify mode?*”



The Risk Assessment Profile Window

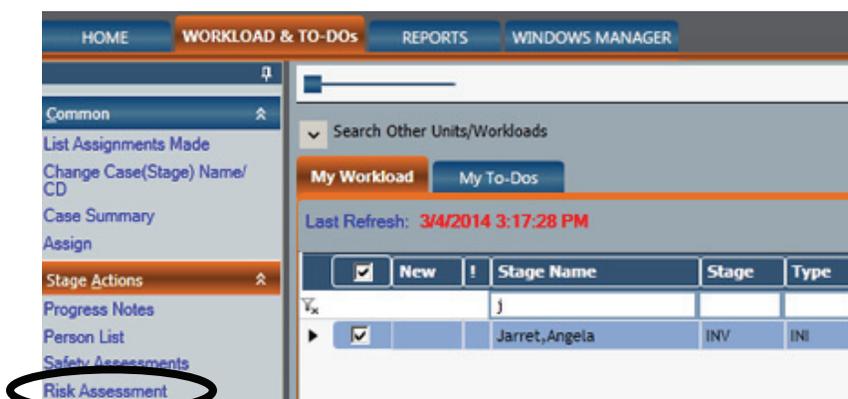
The *Risk Assessment Profile* window will have the same look and feel as other transformed windows with a **NAVIGATION PANE** and a work area containing the Risk Assessment Profile (RAP) questions, scores, and ratings. Both existing and new RAPs will have the same look and feel as other transformed windows upon implementation. Security for this window will not change. There are two methods of navigating to the new window:

- via the **My Workload** tab for modify mode
- via the *Stage Summary* window for view-only mode

Accessing the Risk Assessment Profile Window in Modify Mode

1 On the **My Workload** tab, select the appropriate INV stage.

2 Click the **Risk Assessment** link on the **NAVIGATION PANE**.
The Risk Assessment Profile window displays.



Accessing the Risk Assessment Profile Window in View-Only Mode

1 On the **My Workload** tab, select the appropriate INV stage.

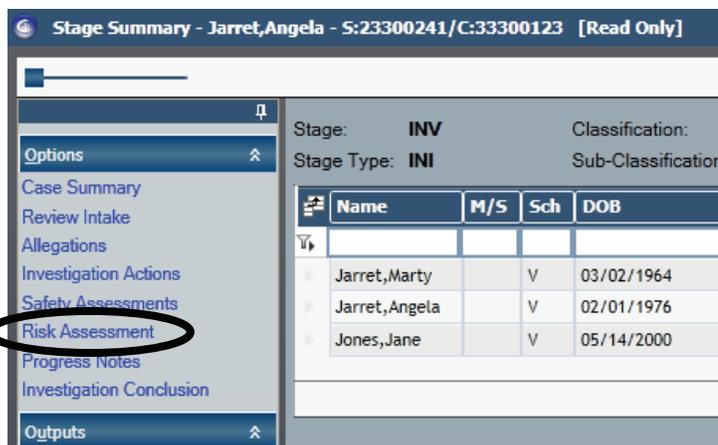
2 Click the **Stage Events** tab.

3 Filter for “Stage Summary” in the **Description** column.

4 Select the Stage Summary event.

5 Click the **Detail** link on the **NAVIGATION PANE**.
The Stage Summary window displays.

6 Click the **Risk Assessment** link on the **NAVIGATION PANE**.
The Risk Assessment Profile <Case Name – Stage ID/Case ID> [Read Only] window displays.



Identifying the Risk Assessment Profile Window Components

The screenshot shows the 'Risk Assessment Profile' window for Jarret, Angela. It features a navigation pane on the left (A), drop-down fields for Effective Date, Primary Caretaker, and Secondary Caretaker (B), and risk score/rating information in the top right (C). The main area contains three tables of questions (D) with response options and comment fields.

No.	Question 1	Response	Verify System Response	Comments	Comment Req
1	Total prior reports for adults and children in RAP family unit:	No prior determined reports	<input type="checkbox"/>		

No.	Questions 2-6	Yes	No	Comments	Comment Req
2	Any child in the RAP family unit was in the care or custody of any substitute caregivers (informally or formally) at any time prior to the current report date.	<input type="radio"/>	<input type="radio"/>		
3	Child under one year old in RAP family unit at time of the current report, and/or new infant since report.	<input type="radio"/>	<input type="radio"/>	N	
4	Current or recent history of housing with serious health or safety hazards; extreme overcrowding; unstable housing; or no housing.	<input type="radio"/>	<input type="radio"/>		
5	Financial resources are mismanaged or limited to the degree that one or more basic family needs are intermittently or chronically unmet.	<input type="radio"/>	<input type="radio"/>		
6	Caretaker has, and utilizes, reliable and constructive support and assistance from extended family, friends, or neighbors.	<input type="radio"/>	<input type="radio"/>		

No.	Questions 7-15	Primary Yes	Primary No	Secondary Yes	Secondary No	Comments	Comment Req
7	Caretaker has been a victim or perpetrator of abusive or threatening incidents with partners or other adults in family/neighborhood.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
8	Caretaker's alcohol use has had negative effects on child care, family relationships, jobs, or arrests, within the past two years.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
9	Caretaker's drug use has had negative effects on child care, family relationships, jobs, or arrests, within the past two years.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
10	Caretaker's behavior suggests a mental health problem exists and/or caretaker has a diagnosed mental illness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
11	Caretaker has very limited cognitive skills.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
12	Caretaker has a debilitating physical illness or physical disability.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
13	Caretaker demonstrates developmentally appropriate expectations of all children.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
14	Caretaker attends to needs of all children and prioritizes the children's needs above his/her own needs or desires.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
15	Caretaker understands the seriousness of current or potential harm to the children, and is willing to address any areas of concern.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		

- (A) **NAVIGATION PANE** – The **NAVIGATION PANE** will display links that provide access to various Risk Assessment tasks (e.g., checking the approval status of Risk Assessments, accessing the *Elevated Risks* window, submitting, saving and submitting).
- (B) **Drop-down Fields** – The drop-down fields will allow you to view or modify (depending on role and Unit Hierarchy) the Effective Date, Primary Caretaker, and Secondary Caretakers.
- (C) **Risk Score and Ratings** – The Risk Score and Risk Ratings will be moved to the upper right-hand corner of the work area, but will continue to function the same.
- (D) **Questions** – Responses to questions 1 – 15 of the Risk Assessment Profile can be viewed or modified here (depending on your role and Unit Hierarchy).

Changes to the Risk Assessment Profile Window

Completing the Window

- When case level RAP information exists, the *Case Level RAP Information* window will display upon opening the *Risk Assessment Profile* window.
- If an invalid Effective Date is recorded, you will still receive a warning message instructing you to correct it. You can continue to record other information before you correct the date. However, that information will be deleted if you click the **Reset** button before you correct and save the date.

- The **Preliminary Risk Score**, **Preliminary Risk Rating**, and **Final Risk Rating** fields will be located in the upper right-hand corner of the window.
- The *Elevated Risk* window will be accessed via a link of the same name in the **Options** section of the **NAVIGATION PANE**.
- Once you select at least one elevated risk on the *Elevated Risk* window and click **OK**, a red “Elevated Risk Exists” label will display beneath the risk score/ratings on the *Risk Assessment Profile* window.
- Question 1 will exclude FAR stages from the calculations.
- Questions 2 – 15 will all be visible without the need for scrolling and will have a **Comments** column, which will display a red checkmark once you have recorded a comment. Instead of a **Spell Check** button, misspelled words will be underlined in red within the comment fields. Right-clicking the underlined word will open a list of suggested replacement words.
- The **Complete** checkbox will no longer display. The status of the RAP will automatically update to “COMP” once all of the minimum system requirements for the RAP have been saved to the window.

Saving and Submitting

- The **Save & Close**, **Save**, and **Reset** buttons will be located in the bottom right-hand corner of the window. Clicking the **Reset** button will undo any unsaved changes made to both the *Risk Assessment Profile* window and the *Elevated Risk* window.
- When you submit a RAP for approval, once you save the *To-Do Detail* window, you will be returned to the **My Workload** tab. Any changes you make after saving the *To-Do Detail* window will invalidate the pending approval.

The Elevated Risk Window

The *Elevated Risk* window will provide for the viewing and/or modifying of the responses to the Elevated Risk Elements. Mentioned above, the **Elevated Risk** link on the *Risk Assessment Profile* window will enable after you record the Effective Date, Primary Caretaker, and responses to RAP questions 1 – 15. The window will contain the same questions as it did prior to implementation, and will have the same look and feel as other transformed windows.

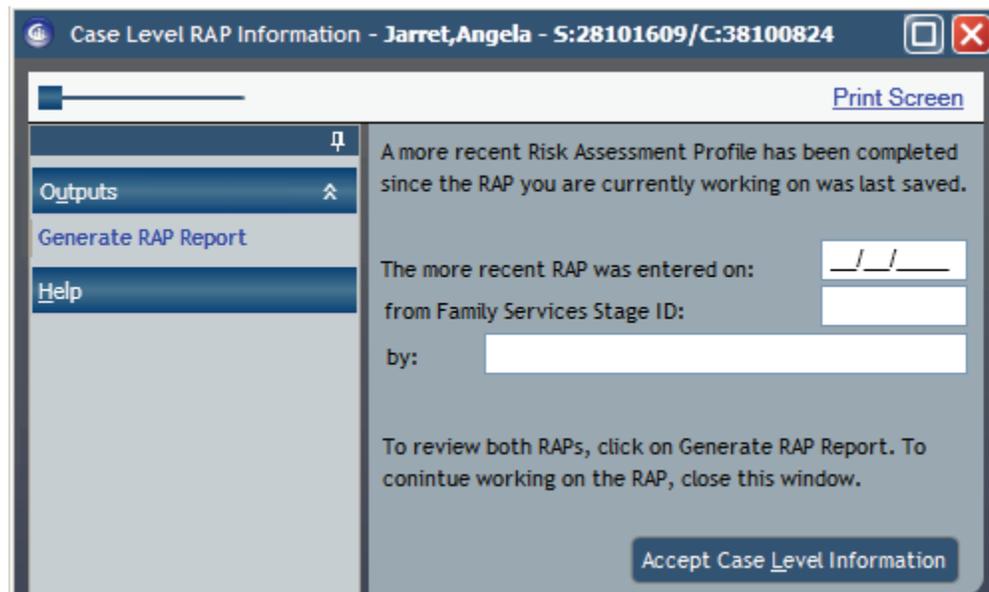
The screenshot shows a window titled "Elevated Risk - Jarret,Angela - S:23300222/C:33300140". The window contains a table with the following data:

Elevated Risk Elements	Yes	No
Death of a child as a result of abuse or maltreatment by caretaker(s)	<input type="radio"/>	<input type="radio"/>
Caretaker(s) has a previous TPR	<input type="radio"/>	<input type="radio"/>
Siblings removed from the home, prior to current report, due to abuse or neglect and remain with the substitute caregivers or foster parent	<input type="radio"/>	<input type="radio"/>
Repeated incidents of sexual abuse or severe physical abuse by caretaker(s)	<input type="radio"/>	<input type="radio"/>
Sexual abuse of a child and perpetrator is likely to have current access to child	<input type="radio"/>	<input type="radio"/>
Physical injury to a child under one year old as a result of abuse or maltreatment by caretaker(s)	<input type="radio"/>	<input type="radio"/>
Serious physical injury to a child requiring hospitalization/emergency care within the last 6 months, as a result of abuse or maltreatment by caretaker(s)	<input type="radio"/>	<input type="radio"/>
Newborn child has a positive toxicology for alcohol or drugs	<input type="radio"/>	<input type="radio"/>

Below the table, there is a text area labeled "Please explain the elevated risks:".

The Case Level RAP Information Window

The *Case Level RAP Information* window will provide you with the ability to compare information from an in-process RAP with the case level RAP information.



Changes to the Case Level RAP Information Window

- The red X button in the upper right-hand corner of the window will replace the **Cancel** button.
- The **Generate RAP Report** link in the **NAVIGATION PANE** will replace the **Generate RAP Report** button. It will allow side-by-side comparison of in-process and case level RAP information.

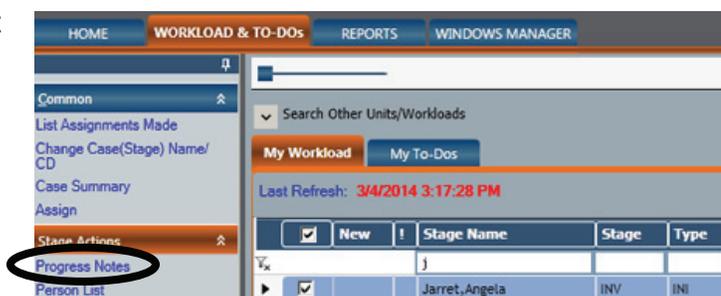
The Progress Notes Window

Upon Build implementation, all INV stage progress notes (existing and new) will be accessed from the new *Progress Notes* window. From this window, and depending upon navigation, progress notes can be created, modified (while in “Draft” status), searched, sorted, filtered, and printed. You can also add addenda to “Final” notes and copy notes from one stage to another. Security for this window will not change. There are three methods of navigating to the new window:

- via the **My Workload** tab for modify mode
- via a Progress Note Task To-Do for modify mode
- via the *Stage Summary* window for view-only mode

Accessing the Progress Notes Window from the My Workload Tab

- 1 On the **My Workload** tab, select the appropriate INV stage.
- 2 Click the **Progress Notes** link on the **NAVIGATION PANE**.
The Progress Notes window displays.



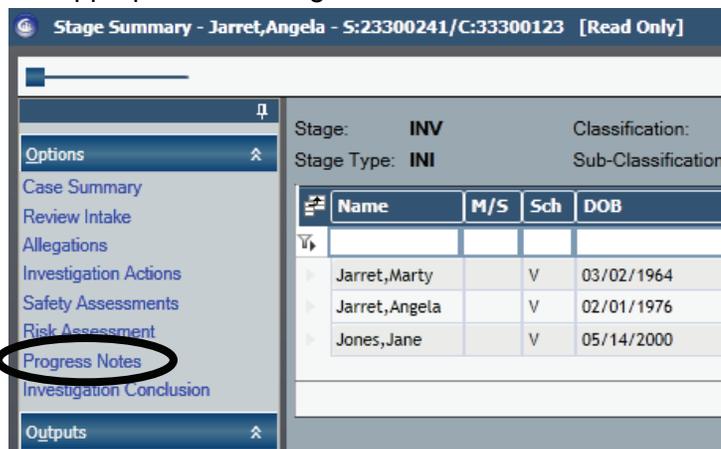
Accessing the Progress Notes Window from the My To-Dos Tab

- 1 On the **My To-Dos** tab, select the Progress Note Task To-Do.
- 2 Click the **Navigate** link for the To-Do.
The Progress Notes window displays.

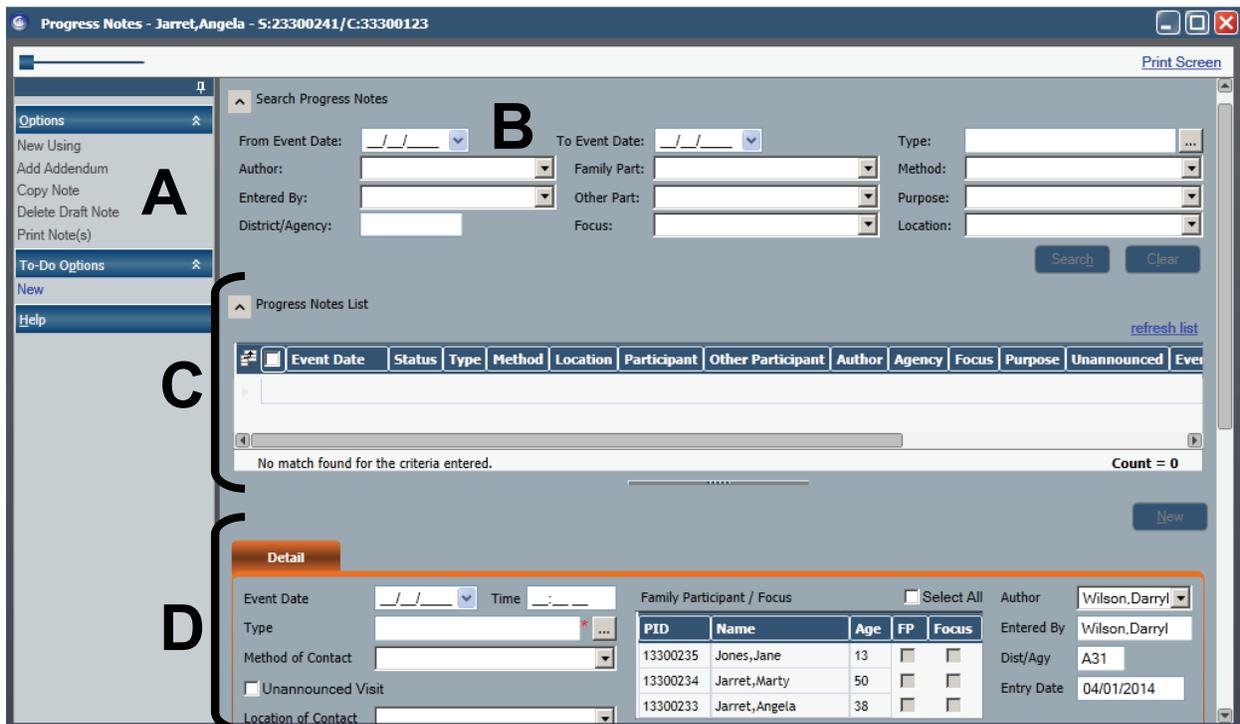


Accessing the Progress Notes Window in View-Only Mode

- 1 On the **My Workload** tab, select the appropriate INV stage.
- 2 Click the **Stage Events** tab.
- 3 Filter for “Stage Summary” in the **Description** column.
- 4 Select the Stage Summary event.
- 5 Click the **Detail** link on the **NAVIGATION PANE**.
The Stage Summary window displays.
- 6 Click the **Progress Notes** link on the **NAVIGATION PANE**.
The Progress Notes <Case Name – Stage ID/Case ID> [Read Only] window displays.



Identifying the Progress Notes Window Components



- (A) **NAVIGATION PANE** – The **NAVIGATION PANE** will contain links that provide access to various progress note actions (e.g., adding addenda, copying notes, deleting “Draft” notes, printing notes).
- (B) **Search Progress Notes** – The **Search Progress Notes** section will allow you to enter search criteria and initiate a search for notes that meet the criteria.
- (C) **Progress Notes List** – The **Progress Notes List** will display all notes recorded for the stage or a subset of notes based on the search criteria you enter. A grid separator beneath the list will let you increase or decrease the number of visible rows and a **New** button will provide you with access to a blank **Detail** tab to record a new note.
- (D) **Detail Tab** – The **Detail** tab will allow you to create, view, and modify progress notes. This tab will display after you select a progress note from the list, or after you click the **New** button.

Viewing/Modifying Existing Progress Notes

- 1 On the *Progress Notes* window, select the progress note you wish to view or modify from the **Progress Notes List**.
*The **Detail** tab displays for viewing and/or modifying. (Note: The ability to modify progress notes will not change).*
- 2 Make the appropriate changes.
- 3 Click the **Save as Final**, **Save as Draft**, or **Save and Enter New Note** button to save your changes.

The screenshot shows the 'Detail' tab of a software application. The interface is organized into several sections:

- Event Information:** Fields for Event Date, Time, Type, Method of Contact, Location of Contact, Other Participant, and Purpose.
- Family Participant / Focus:** A table with columns for PID, Name, Age, FP, and Focus. A 'Select All' checkbox is present.
- Author and Entry Information:** Fields for Author, Entered By, Dist/Agy, and Entry Date.
- Duration:** Fields for Hours and Minutes.
- Text Area:** A large, empty text area for entering the progress note, with a toolbar above it containing icons for Print, Undo, Redo, Bold, Italic, Underline, and other text formatting options.
- Buttons:** At the bottom, there are three buttons: 'Save as Final', 'Save as Draft', and 'Save and Enter New Note', along with a 'Reset' button.

PID	Name	Age	FP	Focus
13500262	Hamlin266,Joey	14	<input type="checkbox"/>	<input type="checkbox"/>
20007501	Jarret,Angela	66	<input type="checkbox"/>	<input type="checkbox"/>

Recording a New Progress Note

- 1 On the *Progress Notes* window, click the **New** button beneath the **Progress Notes List**.
*A blank **Detail** tab displays and expands to the full size of the work area.*
- 2 Record your note.
- 3 Click the **Save as Final**, **Save as Draft**, or **Save and Enter New Note** button to save the note.

Changes to the Progress Notes Window

Searching for Progress Notes

- When you perform a progress notes search for which no matches are found, the message “No match found for criteria entered” will display in the footer of the *Progress Notes* window; the current pop-up window that states “No Progress Notes found to match the search criteria” will no longer display.

Adjusting the Display of Progress Notes

- The **Progress Notes List** will display all progress notes within the stage, or a subset of notes based on the search criteria you have provided; there will no longer be a limit of 200 progress notes per page. You can use the vertical scrollbar and/or the grid separator on the **Progress Notes List** to view the notes.
- The **Progress Notes List** will have column headers that you can rearrange, and filter and sorting capabilities similar to the **My Workload** tab.

Recording and Saving Progress Notes

- Required components of the *Progress Notes* window will display a red asterisk instead of yellow highlighting.
- If you record an invalid date in the **Event Date** field, you will still receive a warning message instructing you to correct it. You can continue to record other information before you correct the date. However, that information will be deleted if you click the **Reset** button before you correct and save the date.
- There will be a new, optional **Duration** field on the **Detail** tab, which you may use to record the duration of the casework activity you are documenting (not how much time was spent recording the note).
- The **Save as Draft**, **Save as Final**, and **Save and Enter New Note** buttons will display on the bottom left-hand side of the window.
- An **Add Addendum** link in the **Options** section of the **NAVIGATION PANE** will allow you to record addenda for notes in “Final” status.

Deleting and Printing Progress Notes

- The first column of the **Progress Notes List** will contain a checkbox column that you may use to select multiple notes for deletion (if in “Draft” status) or printing. This feature replaces the **Select All** button.
- The **Delete Draft Note(s)** link on the **NAVIGATION PANE** will allow you to delete notes in “Draft” status.

Creating Progress Note To-Dos

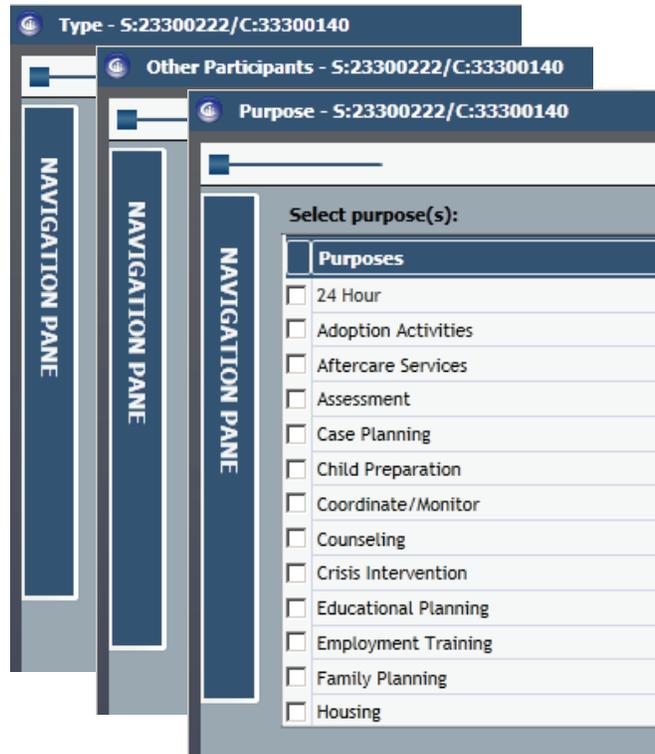
- The **New** link in the **To-Do Options** section of the **NAVIGATION PANE** will allow you to create Progress Note To-Dos.
- When creating a Progress Note To-Do, once you save the *To-Do Detail* window you will be returned to the *Progress Notes* window instead of the **My Workload** tab.

The Type, Other Participants, and Purpose Windows

The **Type**, **Other Participants**, and **Purpose** fields will still contain an ellipsis button (...); which will open the new *Type*, *Other Participants*, and *Purpose* windows.

Changes to the Type, Other Participant, and Purpose Windows

- A red **X** button in the upper right-hand corner will close the window without making any changes; the **Cancel** button will no longer display.
- A **Reset** button will display for you to undo any unsaved changes made to the window.

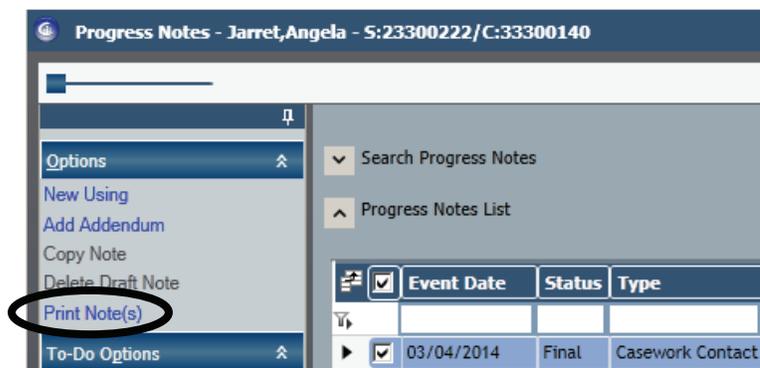


The Print Notes Window

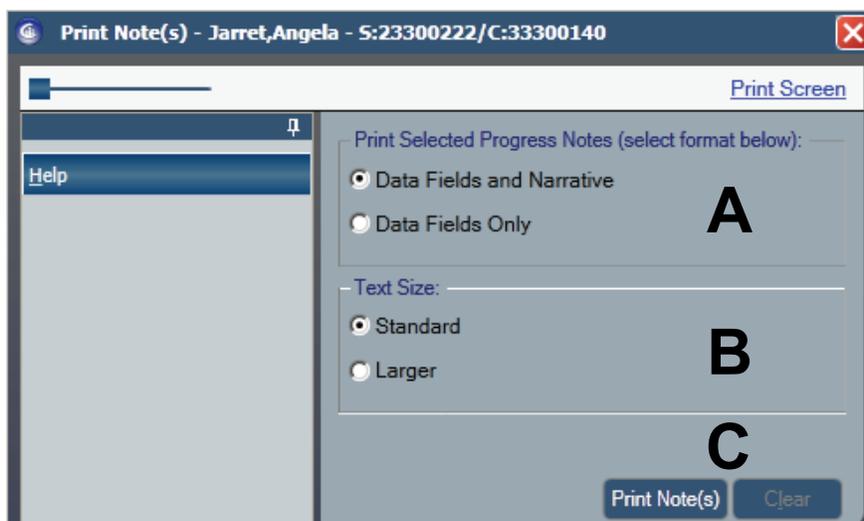
The *Print Notes* window will allow you to print the selected progress note(s). This window will have the same look and feel as other transformed windows.

Accessing the Print Notes Window

- 1 On the *Progress Notes* window, select the progress note(s) you wish to print. The **Print Note(s)** link enables.
- 2 Click the **Print Note(s)** link in the **Options** section of the **NAVIGATION PANE**. The *Print Notes* window displays.



Identifying the Print Notes Window Components



- (A) **Print Selected Progress Notes Section** – The radio buttons in the **Print Selected Progress Notes** section will provide you the ability to select whether you wish to print both the data fields and narratives for selected progress note(s) or the data fields only.
- (B) **Text Size Section** – The radio buttons in the **Text Size** section will be used to set the size of the printed text.
- (C) **Buttons** – The **Print Note(s)** button in the bottom right-hand corner of the window will open an Adobe Reader window on which you can preview and print the selected progress note(s), while the **Clear** button will clear the selections you have made.

Changes to the Print Notes Window

- A red **X** button in the upper right-hand corner will close the window without making any changes; the **Cancel** button will no longer display.
- A **Clear** button will clear any selections you have made.

The Copy Note Window

The *Copy Note* window will allow you to copy progress notes to INV and FAR stages within the same case. This window will have the same look and feel as other transformed windows.

Accessing the Copy Note Window

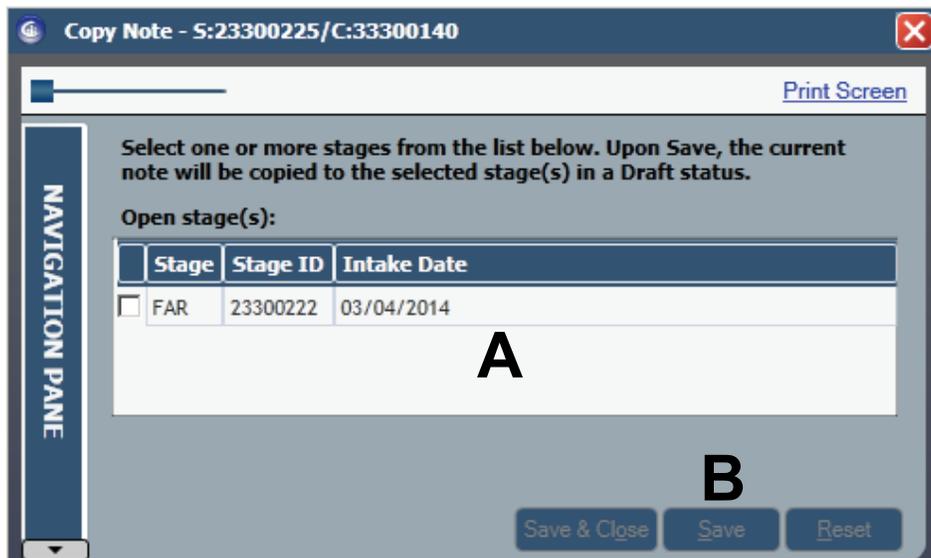
- 1 On the *Progress Notes* window, select the progress note you wish to copy from the **Progress Notes List**.



- 2 Click the **Copy Note** link on the **NAVIGATION PANE**.

The Copy Note window will display, listing any stages (within the same case) to which CONNECTIONS determined the selected note can be copied.

Identifying the Copy Note Window Components



- (A) **Open Stage(s) Grid** – The **Open stage(s)** grid will display the **Stage**, **Stage ID**, and **Intake Date** columns for all stages (in the case) to which you can copy a progress note.
- (B) **Buttons** – The window will display the standard **Save & Close**, **Save**, and **Reset** buttons.

Changes to the Copy Note Window

- The **Open stage(s)** grid will identify the stage type.
- The **Copy Note** feature will include the new FAR stage type. The table below shows what stages you will be able to copy progress notes to and from after Build implementation. (In all instances, the stages in question must have the same case number.)

Copying Permitted		Copying <u>NOT</u> Permitted	
From:	To:	From:	To:
INV	INV	INV	FSS
INV	FAR	FAR	FSS
FAR	FAR	FAR	INV
FSS	INV		
FSS	FAR		

The CPS Investigation Conclusion Window

Upon implementation, the *CPS Investigation Conclusion* window will include new features that allow you to change the sub-classification of the investigation, and to track switch the INV stage to a FAR stage.

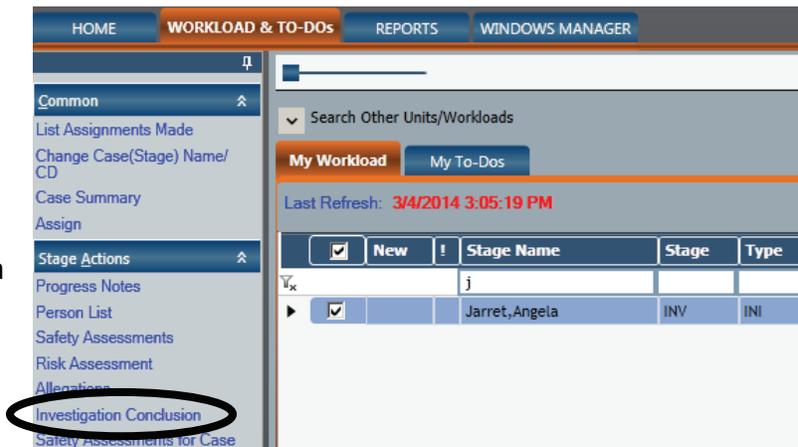
Accessing the CPS Investigation Conclusion Window in Modify Mode

- 1 From the **My Workload** tab, select the appropriate stage.

*The **Stage Actions** section of the NAVIGATION PANE displays.*

- 2 Click on the **Investigation Conclusion** link in the **Stage Actions** section.

*The **Investigation Conclusion** window displays.*

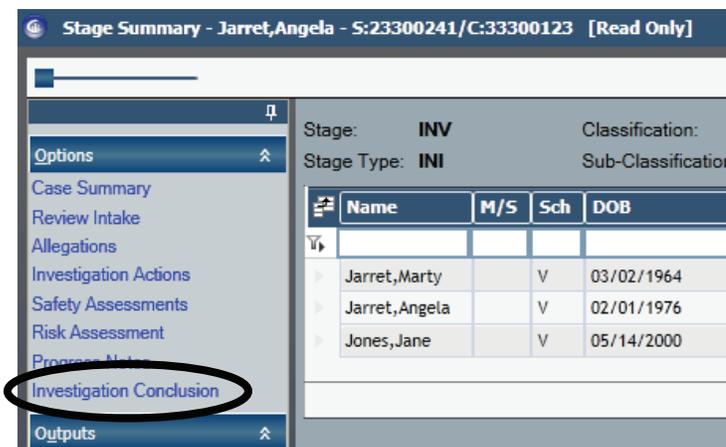


Accessing the CPS Investigation Conclusion Window in View-Only Mode

- 1 On the **My Workload** tab, select the appropriate INV stage.
- 2 Click the **Stage Events** tab.
- 3 Filter for “Stage Summary” in the **Description** column.
- 4 Select the Stage Summary event.

- 5 Click the **Detail** link on the **NAVIGATION PANE**.
*The **Stage Summary** window displays.*

- 6 Click the **Investigation Conclusion** link on the **NAVIGATION PANE**.
*The **Progress Notes <Case Name – Stage ID/Case ID> [Read Only]** window displays.*



Identifying the CPS Investigation Conclusion Window Components

The screenshot shows a web application window titled "CPS Investigation Conclusion - Jarret,Angela - S:23300241/C:33300123". On the left is a navigation pane (A) with links: Options, Submit, Save & Submit, Approval Status, Narrative, Mandated Reporter, Investigation Summary, and Help. The main work area (B) contains the following fields and controls:

- Case Name: Jarret,Angela
- Risk Rating: [empty]
- Resource ID: [empty]
- Facility: Angela Jarret
- Investigation Dates: Intake Received: 12/03/2013 10:04 AM; Incident Occurred: [empty]
- Investigation Dates: Investigation Begun: [calendar icon]; Investigation Completed: [calendar icon]
- Determination: [empty]
- Closure Reason: [dropdown menu]
- Sub-Classification: Foster Care [dropdown menu]
- Buttons: Close as Duplicate, Duplicate Stage ID: [dropdown menu]
- Checkboxes: Fatality - No Surviving Children; Switch track from INV to FAR
- High Risk Comments: [text area]

- (A) **NAVIGATION PANE** – The **NAVIGATION PANE** will contain several sections with links that provide access to various CPS Investigation Conclusion tasks (e.g., saving and submitting, checking the status of an approval, accessing the Investigation Conclusion Narrative, generating the Mandated Reporter Summary letter).
- (B) **Work Area** – The work area of the window will contain sections to record investigation dates, determination, closure reason, and high risk comments, as well as the Close as Duplicate function. For Foster Care/Day Care INV stages, it will also contain the new **Sub-Classification** drop-down menu and the **Switch track from INV to FAR** checkbox.

Changes to the CPS Investigation Conclusion Window

- A new **Switch Track from INV to FAR** checkbox will replace the **Family Assessment Response** checkbox on the *Investigation Conclusion* window. Enabled only for FAR-participating districts, this checkbox can be used to track switch an INV stage to a FAR stage within the first seven (7) days of the investigation.

The New Sub-Classification Field

- The *CPS Investigation Conclusion* window will now have a **Sub-Classification** drop-down field. This field will display only for Foster Care/Day Care investigations, and must be completed before the Investigation Conclusion can be submitted for approval.

The image shows a close-up of two dropdown menus. The top one is labeled "Closure Reason:" and is currently empty. The bottom one is labeled "Sub-Classification:" and shows "Foster Care" selected.

- The **Sub-Classification** drop-down field will only be enabled for:
 - Primary workers;
 - Secondary workers in the same district as the Primary; and
 - anyone in the Unit Hierarchy of the Primary or Secondary.
- If a sub-classification was chosen during stage progression, it will pre-fill the *CPS Investigation Conclusion* window.

- The sub-classification of the stage (“Foster Care” or “Day Care”) determines whether you will need to submit a Safety Assessment and RAP in order to submit the Investigation Conclusion for approval; a sub-classification of “Foster Care” requires a Safety Assessment and RAP, while “Day Care” does not.
- If you do not select a sub-classification for an INV stage that requires one, upon submitting the Investigation Conclusion for approval, you will receive an error message that states: “*Sub-Classification must be selected prior to submitting investigation.*” You will not be able to proceed until you record a sub-classification.
- If you change the sub-classification from “Foster Care” to “Day Care” *after* a Safety Assessment or RAP has been approved, the events and To-Dos will remain part of the stage. If you change the sub-classification from “Foster Care” to “Day Care” *before* a Safety Assessment or RAP has been approved, the events and To-Dos will be deleted from the stage or suspended depending on their status; that is, “NEW” events will be deleted, while “PROC” and “PEND” events will be suspended.

Track Switching from INV to FAR

The *Investigation Conclusion* window will display a **Switch track from INV to FAR** checkbox that you can use to change an INV stage to a FAR stage when it is deemed appropriate. This checkbox will only display if your county participates in FAR *and* you are either the Primary worker, a Secondary worker from the Primary worker’s district, or a worker in the Unit Hierarchy of one of those workers.

Though *visible* under the aforementioned circumstances, the checkbox will be *disabled* if:

- the *Investigation Conclusion* window was accessed through the Stage Summary path;
—OR—
- the determination is currently suspended due to a consolidation;
—OR—
- the stage has been previously track switched (only one track switch is permitted).

Switching Tracks from INV to FAR

- 1 On the *Investigation Conclusion* window, select the **Switch track from INV to FAR** checkbox.
The Save & Close button enables.
- 2 Click the **Save & Close** button.

The screenshot shows the 'Investigation Conclusion' window for a case named 'Jarret, Angela'. The window includes fields for 'Investigation Dates', 'Intake Received' (03/04/2014 02:49 PM), 'Incident Occurred', 'Investigation Begun', and 'Investigation Completed'. There are also dropdown menus for 'Determination' and 'Closure Reason'. A 'Close as Duplicate' button and a 'Duplicate Stage ID' dropdown are visible. At the bottom, there are checkboxes for 'Fatality - No Surviving Children' and 'Switch track from INV to FAR', with the latter being circled in red. A 'High Risk Comments' field is also present.

Track Switching Requirements

Once you have clicked the **Save & Close** button, CONNECTIONS will determine whether all track switching requirements have been met. Error messages will be generated automatically for any unmet system requirements, which will prevent you from proceeding with the track switch. These error messages will display when any of the following are true:

- The Intake Received date is more than seven (7) days in the past.
- The stage contains a person with the role of Abused (AB), Confirmed Abused (CA), or Non-Confirmed Abused (NA).
- The stage contains allegations of Sexual Abuse (SXAB), DOA/Fatality (FATL), Abandonment (ABAN), or Malnutrition/Failure to Thrive (MITT).
- The stage contains a RAP in “APRV” status.
- The stage contains a Safety Assessment with a Safety Decision of 3 or higher.
- The stage is part of a case that is pending a Case Merge.
- A Family Services Intake (FSI) has already been created from the INV stage.
- The INV stage has a classification of “Foster Care/Day Care” and the **Sub-Classification** drop-down has been left blank, or has been set to “Day Care.”
- The Primary worker has not yet accepted the INV stage.

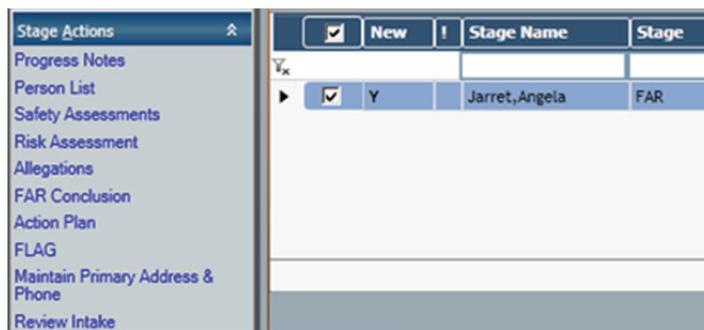
Track Switching Warnings

If all track switching requirements have been met, CONNECTIONS will then check for certain conditions and display warning messages if any of the conditions are true. These warning messages will inform you what the condition is, what will occur if the track is switched, and the option to proceed or cancel the track switch. These warning messages will display when any of the following conditions are true:

- Allegations in the stage have been addressed.
Warning message: *“Determination of all allegations will be cleared and roles of all individuals will be recalculated. Continue?”*
- The stage contains a Safety Assessment that is pending supervisory approval.
Warning message: *“Pending Safety Assessments will be invalidated. Continue?”*
- The stage contains a RAP that is pending supervisory approval.
Warning message: *“Pending RAP will be invalidated. Continue?”*

Display of the New FAR Stage

Upon passing the error and warning checks (or clicking the **Yes** button on any warning messages), the INV stage will be converted, the *INV Conclusion* window will close, and you will be returned to your workload, where the FAR stage will now display. Upon selecting it, the **NAVIGATION PANE** will display the FAR-related stage action links.



After the Track Switch

Stage Demographics and Assignments

- The Stage ID, Stage Name, and Start/Assigned Date for the FAR stage will remain the same as that in the INV stage.
- The Primary and Secondary workers will be carried forward into the FAR stage. They will retain their roles, assignment events, and To-Dos.

Persons

- All people in the INV stage at the time of track switching will be carried forward and displayed in the FAR stage. Their person information, To-Dos, and events will be carried forward as well.

Safety Assessments and the RAP

- Safety Assessments from the INV stage will be carried forward and displayed in the *Safety Assessments* window of the FAR stage. Safety Assessments will retain their status, with the exception of Safety Assessments with a status of “PEND,” which will revert back to “COMP” and will need to be resubmitted for approval. Safety Assessments carried forward into the FAR stage will follow all rules applicable to a regular FAR stage.
- With the exception of approved Safety Assessments, if a Safety Assessment has a type of “Inv Determination” or “Alleged Child Fatality,” the type will be cleared and you will be able to select a new type that applies to the FAR stage.
- Information recorded in the INV stage RAP will be carried forward and displayed in the FAR stage if the RAP is not pending/approved. All To-Dos associated with the RAP will be deleted; however, the RAP event will remain.

Progress Notes and Allegations

- All Progress Notes recorded in the INV stage (in both “Draft” and “Final” statuses) will be carried forward and displayed in the FAR stage, and will retain their status.
- Any allegations recorded in the INT or INV stages will be carried forward into the FAR stage. Allegations recorded at intake will continue to display “INT” in the **Stage** column of the *Allegations* window; however, allegations recorded in the INV stage will be updated and will display “FAR” in the **Stage** column.
- If any allegations have been substantiated or unsubstantiated, those values will be cleared. Any information recorded in the **Subject’s Function in Facility** field will also be cleared.

Investigation Conclusion and Stage Summary

- The overall determination will be cleared and reset to “Family Assessment Response” for the FAR stage.
- The *Stage Summary* window will correspond to the FAR stage. On this window, an additional section titled “**INV Options**” will display in the **NAVIGATION PANE**, containing links to the INV-specific windows. If data was recorded on a window prior to the track switch, a checkmark will display next to the corresponding link.



To-Dos

- To-Dos created in the original INT stage will remain unchanged.
- All Secondary workers of the INV stage will receive an Alert To-Do indicating that the track has been switched from INV to FAR.
- To-Dos assigned to the Primary or Secondary workers of the INV stage will be carried forward and displayed in the FAR stage.
- Worker-created Progress Note and Allegation Task To-Dos from the INV stage will be carried forward and displayed in the FAR stage.
- All assignment-, person- and stage-specific To-Dos will be carried forward and displayed in the FAR stage with the exception of the Investigation Conclusion, Investigation Actions, and Maintain Allegations To-Dos, which will be invalidated.
- Pending Safety Assessments and Investigation Conclusion Approval To-Dos will be invalidated.
- To-Dos corresponding to the FAR stage will be generated and based on the Intake Received date.
- Any generic To-Dos created in the INV stage will be carried forward and displayed in the FAR stage.

Events

- Events created in the original INT stage will remain unchanged.
- All events associated to the INV stage will be associated to the new FAR stage. Event dates will remain unchanged.
- The Investigation Conclusion event will be carried forward and displayed in the FAR stage. The Investigation Conclusion will be viewable via the *Stage Summary* window.
- A new event will be created to indicate that a FAR stage has been opened.

The New Stage Summary Window

Upon Build implementation, there will no longer be a **CPRS** link on the **NAVIGATION PANE** of the **My Workload** tab; the *Child Protective Record Summary* window will no longer be available. Instead, the new *Stage Summary* window will provide you with access to specific view-only stage action windows for INV stages (i.e., Case Summary, Review Intake, High Priority Factors (NYC only), Allegations, Investigation Actions, Safety Assessments, Risk Assessment, Progress Notes, Local Protocol, and Investigation Conclusion).

There are two methods of navigating to the new window using a Stage Summary event:

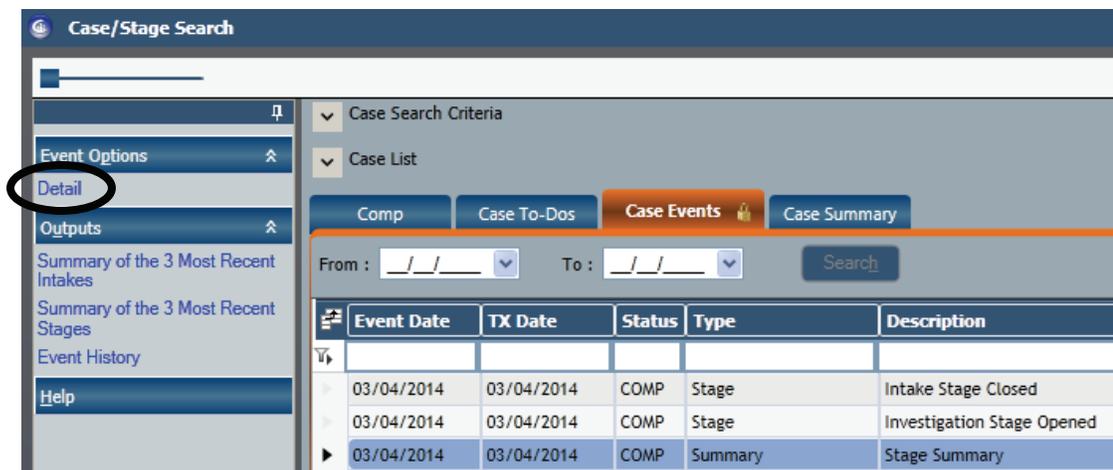
- via the **Case Events** tab from a Case Search
- via the **Stage Events** tab from the **My Workload** tab

Approvers can also access this window by navigating from an Investigation Conclusion Approval To-Do.

No matter what access point you use, the *Stage Summary* window and all windows accessed from it will have a “[Read Only]” label to remind you that this window is view-only.

Accessing the Stage Summary Window Through a Case Search

- 1 From the **Search/Maintain** drop-down menu on the main CONNECTIONS window, select the **Case Search** command.
- 2 Enter the search criteria for the case you wish to locate.
- 3 Click the **Search** button.
- 4 Select the case from the **Case List**.
*The **Comp**, **Case To-Dos**, **Case Events**, and **Case Summary** tabs display.*
- 5 Click the **Case Events** tab.
- 6 Filter for “Stage Summary” in the **Description** column.
- 7 Select the Stage Summary event.
- 8 Click the **Detail** link in the **Event Options** section of the **NAVIGATION PANE**.
*The *Stage Summary <Case Name – Stage ID/Case ID> [Read Only]* window displays.*



Accessing the Stage Summary Window from the My Workload Tab

- 1 On the **My Workload** tab, select the appropriate stage.
*The **Case To-Dos** and **Stage Events** tabs display.*
- 2 Click the **Stage Events** tab.
- 3 Filter for “Stage Summary” in the **Description** column.
- 4 Select the Stage Summary event.
*The **Detail** link enables.*
- 5 Click the **Detail** link in the **Event Options** section of the **NAVIGATION PANE**.
The Stage Summary <Case Name – Stage ID/Case ID> [Read Only] window displays.

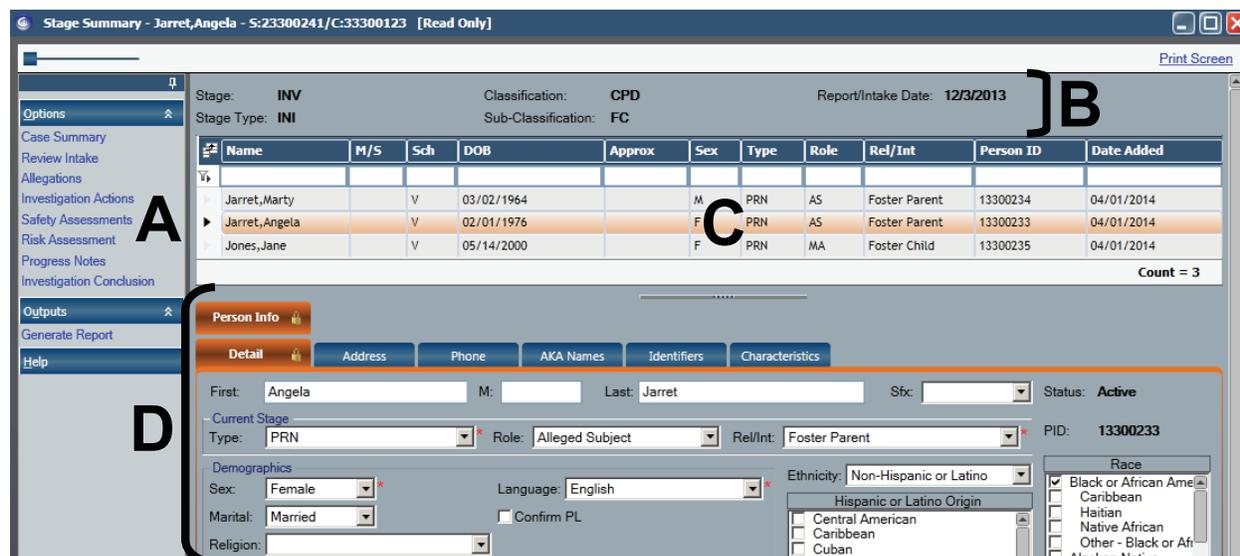
Event Date	TX Date	Status	Type	Description	Stage	Stage Name
03/04/2014	03/04/2014	COMP	Assignment	Primary Assignment Issued For: of Cnty/Agy : 031	INV	Jarret,Angela
03/04/2014	03/04/2014	COMP	Stage	Investigation Stage Opened	INV	Jarret,Angela
03/04/2014	03/04/2014	COMP	Summary	Stage Summary	INV	Jarret,Angela

Accessing the Stage Summary Window from an Approval To-Do

- 1 On the **My To-Dos** tab, select the Approval To-Do for the Investigation Conclusion.
- 2 Click the **Navigate** link.
The Stage Summary <Case Name – Stage ID/Case ID> [Read Only] window displays.

Type	Status	Date	Case Name	Stage ID	Stage Name	Description
PROC		03/11/2014	Jarret,Angela	23300222	Jarret,Angela	DW - Approve CPS Investigation

Identifying the Stage Summary Window Components



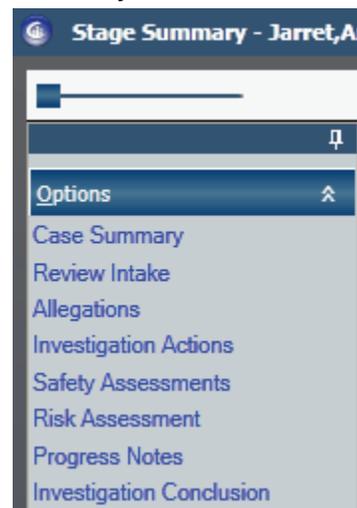
- (A) **NAVIGATION PANE** – The **NAVIGATION PANE** will contain links to view-only INV stage components (e.g., Allegations, Investigation Actions, Safety Assessments, Progress Notes, Investigation Conclusion).
- (B) **Header Information** – The header will contain demographic information for the stage, including the new sub-classification field for Foster Care/Day Care INV stages.
- (C) **Person List Grid** – The grid will display a list of all active persons in the stage.
- (D) **Person Info Tab** – Upon selecting a person from the grid, the **Person Info** tab will display below, allowing you to view detailed information pertaining to that individual.

Stage Summary Overview

Using the **NAVIGATION PANE** links, you will be able to open multiple view-only stage action windows at one time. These windows, in combination with the *Stage Summary* window, will function as a group. Therefore, they will only display while the *Stage Summary* window is maximized; if you minimize the *Stage Summary* window, these windows will also minimize. Additionally, when using Windows Manager, only a Stage Summary window card will display.

Corresponding CPRS Elements

- The **NAVIGATION PANE** will contain a link to the *Case Summary* window, which will replace the **Case Identification** tab of the *Child Protective Record Summary* window.
- The **NAVIGATION PANE** will contain a **Review Intake** link, which will open the *Review Intake* window. This link replaces both the **Intake Narrative** and **Reporter/Source** buttons. (Note: The **Review Intake** link will only be



displayed if you have the appropriate security; security will not change upon Build implementation).

- The person list grid will display in the work area of the *Stage Summary* window. It will replace the **Household Composition** tab of the *Child Protective Record Summary* window. The information will be organized similar to the **Person Info** tab on the *Persons List* window.
- “Help on Narratives” will be available as a topic within Online Help; there will be no **Help on Narratives** button on the *Stage Summary* window.
- The **Fatality Report** and **High Priority Factor** indicators will display in the upper right-hand corner of the *Stage Summary* window if either are present in the stage.

Events

- The Stage Summary event will replace the Child Protective Record Summary event on all event lists for new *and* existing stages.
- When you track switch a FAR stage to an INV stage, the Stage Summary event from the FAR stage will be retained in the INV stage; a new INV Stage Summary event will not be created. While the **Options** section of the **NAVIGATION PANE** will contain links for an INV stage, a separate **FAR Options** section of links will also display in the pane.

Supervisors

- Supervisors will be able to access the *Stage Summary* window for stages assigned to workers in their unit through the **Stage Events** sub-tab on the worker’s **My Workload** tab using the **Search Other Units/Workloads** functionality.
- When approving an Investigation Conclusion, you will receive a notification advising that any pending Safety Assessments will be approved along with the Investigation Conclusion. You will no longer see the *Pending Events* window when selecting the Investigation Conclusion event.

Local Protocol

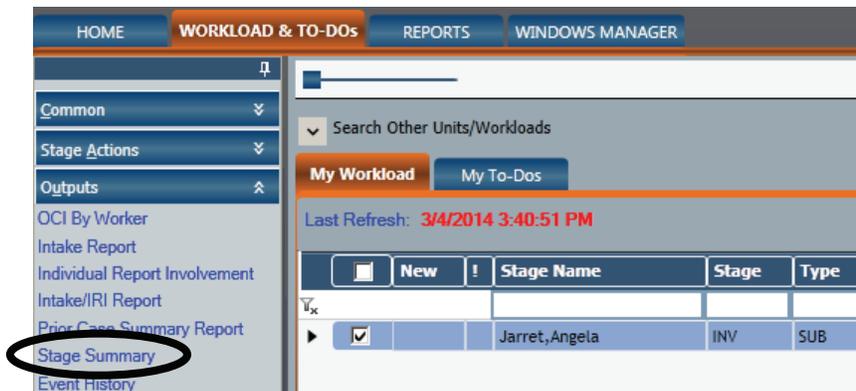
- If your district uses a local protocol, the **Local Protocol** template will be accessible via the **Local Protocol** link in the **NAVIGATION PANE**.
- Once you have saved information to the *Local Protocol* window, a red checkmark indicator will display next to the **Local Protocol** link to indicate that data exists.

The Generate Report Window

The *Generate Report* window will allow you to print the Stage Summary Report and will replace the *CPRS Generate Report* window.

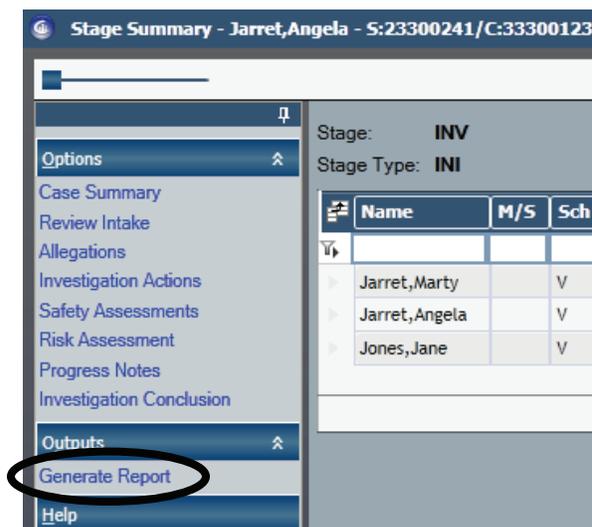
Accessing the Generate Report Window from the My Workload Tab

- 1 On the **My Workload** tab, select the appropriate INV stage.
- 2 Click the **Stage Summary** link. *The Generate Report window displays.*

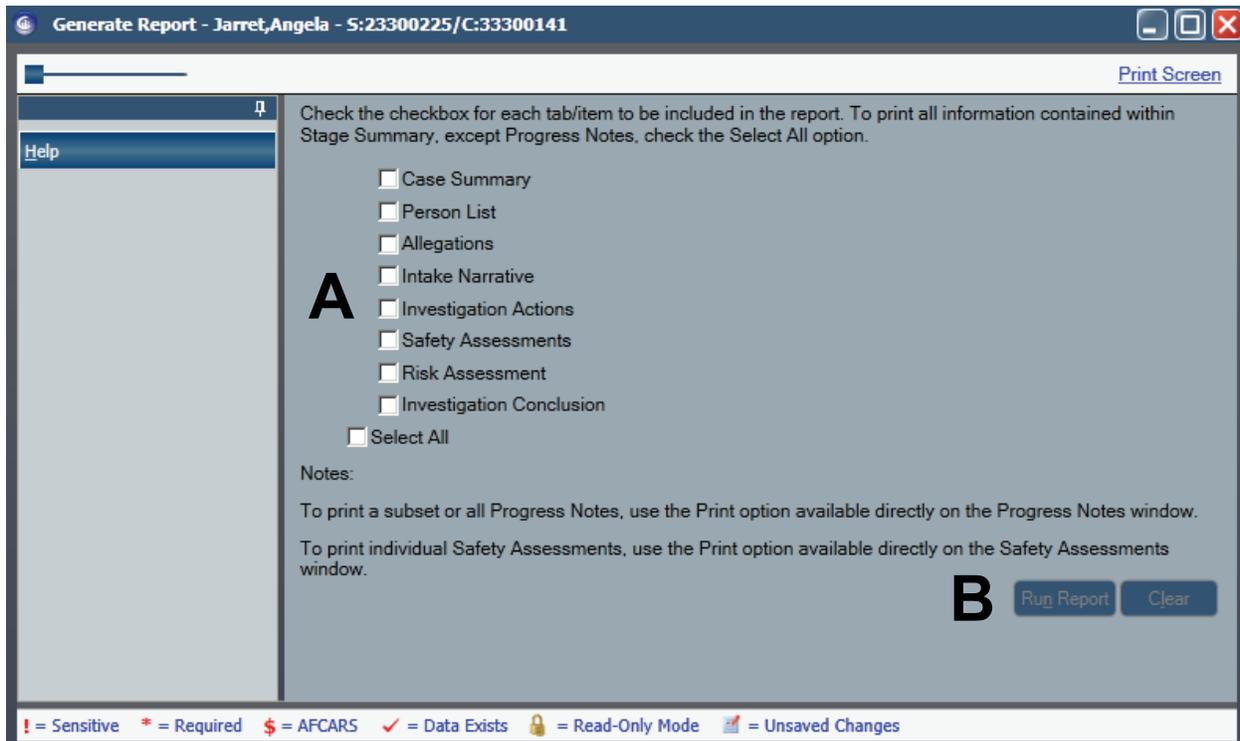


Accessing the Generate Report Window from the Stage Summary Window

- 1 On the **My Workload** tab, select the appropriate INV stage.
- 2 Click the **Stage Events** tab.
- 3 Filter for “Stage Summary” in the **Description** column.
- 4 Select the Stage Summary event.
- 5 Click the **Detail** link on the **NAVIGATION PANE**. *The Stage Summary window displays.*
- 6 Click the **Generate Report** link on the **NAVIGATION PANE**. *The Generate Report window displays.*



Identifying the Generate Report Window Components



- (A) **Checkboxes** – The list of checkboxes will display the names of all windows available from the **NAVIGATION PANE** of the *Stage Summary* window (with the exception of Progress Notes). You will use the checkboxes to select which information to include in the report.
- (B) **Buttons** – The **Run Report** button will generate the Stage Summary Report, while the **Clear** button will deselect all checkboxes.

Changes to the Generate Report Window

- A red X button in the upper right-hand corner will close the window without making any changes; the **Cancel** button will no longer display.
- Available checkboxes correspond to the **NAVIGATION PANE** links of the *Stage Summary* window, instead of the tabs on the *Child Protective Record Summary* window.
- A **Clear** button will remove any settings you have selected on the window.

Resources

OCFS Intranet Site: CONNECTIONS Help/Training

Many resources are available for you on the **CONNECTIONS Help/Training** page of the OCFS intranet site (http://ocfs.state.nyenet/connect_help/Default.asp). There, you will find resources such as these:

- How Do I? documents
- Job Aids
- Tip Sheets
- Other Quick Start Guides

These documents and others will continue to be developed and updated to provide you with the most up-to-date information on CONNECTIONS.

When you are working in CONNECTIONS, an easy way to access the intranet site is by clicking the **Help/Training** link on the toolbar of the main CONNECTIONS window.

CONNECTIONS Regional Implementation Staff

If you cannot find the answer to your question(s) within the documentation mentioned above, you can contact one of the many statewide CONNECTIONS Regional Implementation Staff members. The current list of members is always available on the OCFS CONNECTIONS Internet and intranet sites:

On the **Internet**:

<http://www.ocfs.state.ny.us/connect/contact.asp>

On the **intranet**:

<http://ocfs.state.nyenet/connect/contact.asp>

Application Help Mailbox

You can directly contact the NYS CONNECTIONS User Support/Triage staff for help with complex application issues. Questions, problems, and concerns can be emailed to:

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

NYS OFT Customer Care Center

The New York State Office for Technology (NYS OFT) Customer Care Center staff are available to answer basic questions related to your equipment, or to solve problems you are having with CONNECTIONS. If they cannot solve your problem, they will record your information and forward it to others who can. The Customer Care Center is staffed 24 hours a day, seven days a week. The telephone number is:

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

Professional Development Program

Another resource is the CONNECTIONS Training Project of the Professional Development Program (PDP), Rockefeller College, University at Albany. CONNECTIONS trainers can provide you with personal attention and assistance when you have a question about or are experiencing an issue with any area of CONNECTIONS.

To reach a CONNECTIONS trainer during normal business hours, call **(518) 443-5940** and ask for an available CONNECTIONS representative.