CONNECTIONS Tip Sheet: Creating a FAR Associated FSS

NEW YORK STATE | Office of Children and Family Services

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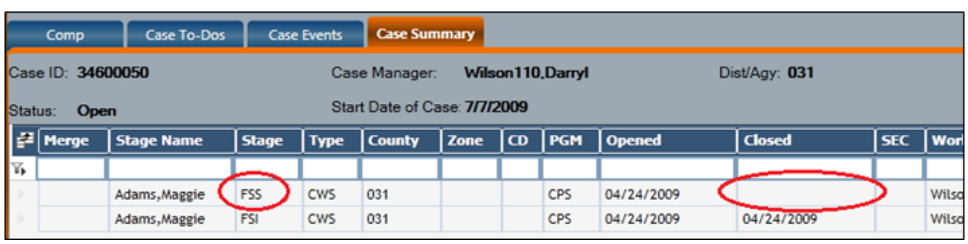
During the course of work in a CPS FAR stage, a family's need for ongoing services may become apparent. A Family Services Stage (FSS) can be opened at any time, not just when the FAR stage is ready to close. The Family Services Intake (FSI) standardizes intake information and is the path by which a Family Service Stage is created. This tip sheet describes the process by which FAR workers and supervisors can open an FSS from within an existing FAR stage or can open a separate FSS and add it to the same case number as the existing FAR stage.

IMPORTANT: No FSI is needed if the family already has an open Family Services Stage in your district. Before recording an FSI, check to see if an open FSS already exists. If so, do not create an FSI – simply assign the needed roles in the existing FSS stage.

Check for An Open FSS Stage

1. On your workload, highlight the FAR stage.
2. Click the **Person List** link in the left navigation pane.
3. Highlight a person in the Person List window.
4. Click the **Case List** tab.
5. Highlight a case with the status of "OPN".
6. Click the **Case Summary** tab.
7. Check to see if there is an open stage FSS stage. An open stage will not have a date in the "Closed" column.
8. Check ALL persons in the FAR stage.

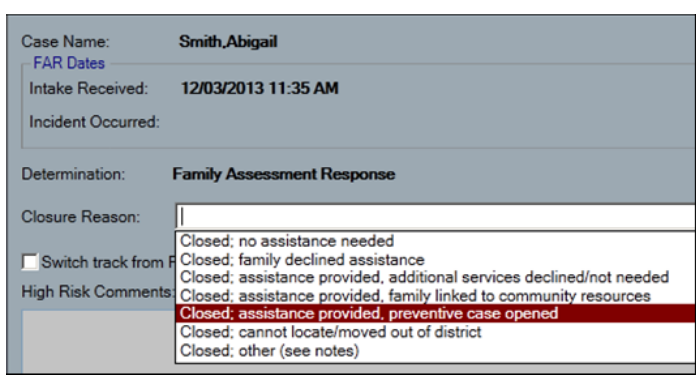


If no open FSS exists, there are 2 methods by which an FSI/FSS can be created and linked to a FAR stage.

Creating an FSI when Closing the FAR Stage

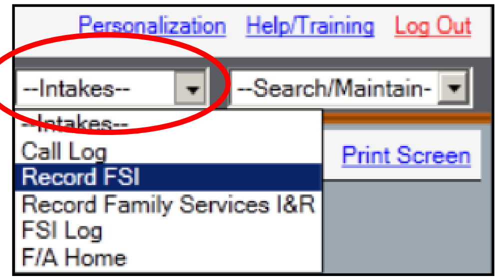
An FSI will automatically be created from a FAR stage when the stage is closed using the closure reason of "Closed; assistance provided, preventive case opened".

1. On your workload, highlight the FAR stage.
2. Click the **FAR Conclusion** link in the left navigation pane.
3. In the Closure Reason field, select "Closed: assistance provided, preventive case opened".
4. Click the **Submit** link in the left navigation pane.



5. Once the closure is approved, an FSI is automatically created and will appear on the FAR worker's workload under the same Case Number as the FAR stage from which it was created.

Creating an FSI Linked to the FAR Case Number



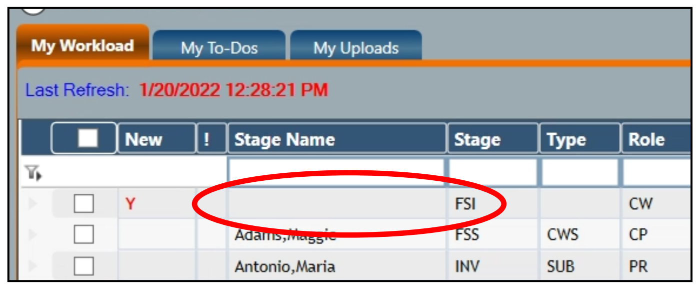
If no open FSS exists and the FAR stage is not ready to be closed, you can still open an FSI/FSS using the Intakes menu in the upper right corner of the main CONNECTIONS window.

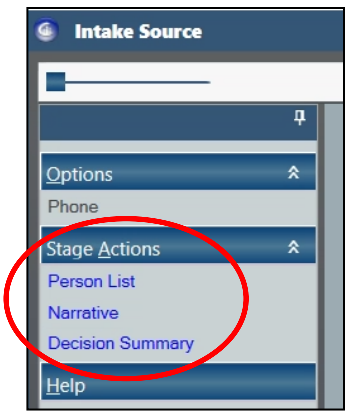
Note: This option is only to workers who have been assigned the **CREATE FSI** Business Function.

1. Select "**Record FSI**" from the Intakes menu.

   The FSI Intake Source window displays for you to begin recording information.

   While FSI windows may be completed in any order, completing and saving the Intake Source window first will result in the new stage appearing on your Workload without a displayed name.





   You may prefer to use the links in the navigation pane of the Intake Source window to select and complete Person List information first so that the saved FSI displays as a named stage.

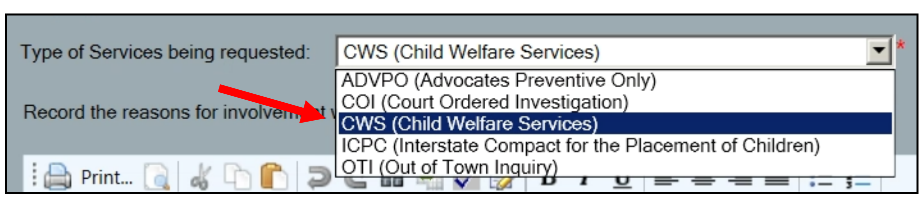
   You will not be able to create an FSS (the **Create FSS** link will not enable), however, until all FSI windows are complete.

When a Family Service Intake is created from the Record FSI command, a ***new*** Case Number and Stage Number are created for the FSI. Unlike an FSI created from the closure of the FAR stage, no information is prefilled; all data must be manually entered.

Intake Source

The Intake Source window captures information about the person creating the FSI. Please note that a phone number is **required** to stage progress the FSI even though it is not marked with a red asterisk (*).

Narrative



1. In the **Type of Services being requested** field, select. "CWS (Child Welfare Services)"
2. Record the reasons for involvement with this family and why services are needed.

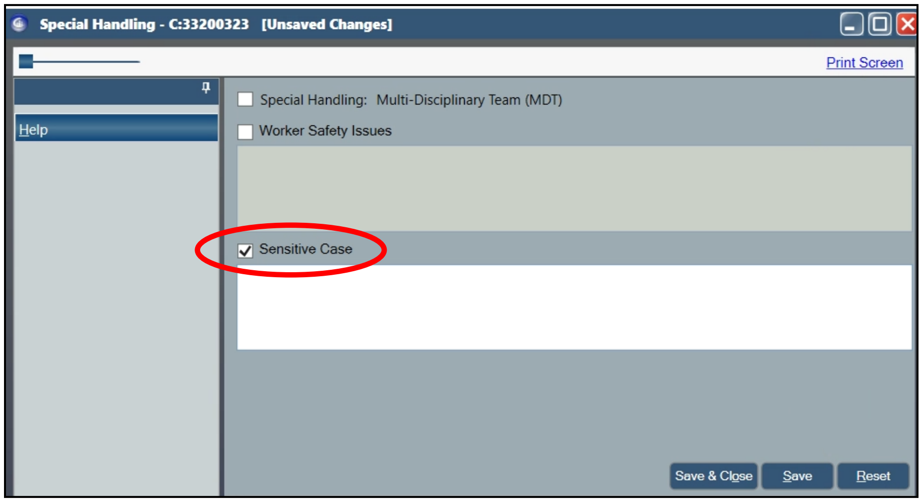
   In the narrative, clearly summarize the presenting needs of the individual/family and document the corresponding need for services.

   Once saved, narrative entries cannot be modified. Additional narratives may be added, however, with each entry stamped with the worker's name and the date and time it was added.

<u>Note</u>: Information entered in the FSI Narrative will be brought forward to the Family Update section of all future FASPs as the Original Reason for Case Opening.

If appropriate, an FSI stage can be marked as sensitive by clicking the **Special Handling** link in the navigation pane of the Narrative window.

In the *Special Handling* window, check the **Sensitive Case checkbox**. Enter an effective date and an explanation as to why the case is being marked as such.



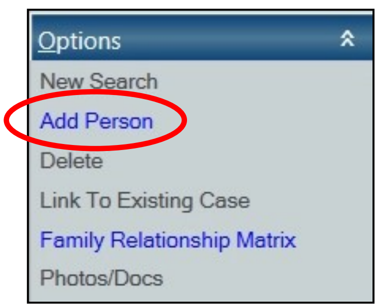
Note: This action marks *<u>all stages in the case</u>* – not just the FSI stage – as sensitive and will restrict access to it.

> Unlike other areas of CONNECTIONS, a worker completing an FSI does ***NOT*** need the Mark Sensitive business function in order to mark an FSI stage as sensitive.

<u>Person List</u>

1. Click the **Add Person** link in the navigation pane to begin adding household members.

   The Person Search window displays.



2. Conduct a search of the database to see if the desired person is already listed. While you can search for stage members listed in the FAR stage by Person Identification Number (PID) to easily locate the correct person, best practice is to do a Phonetic Name search to be sure multiple PIDs do not exist for each individual. If found, multiple PIDs should be merged to keep all the person's history together under a single PID.

> **<u>Reminder</u>:** All household members plus the biological parents of any tracked children, whether or not they live in the household, should be added to the FSI.

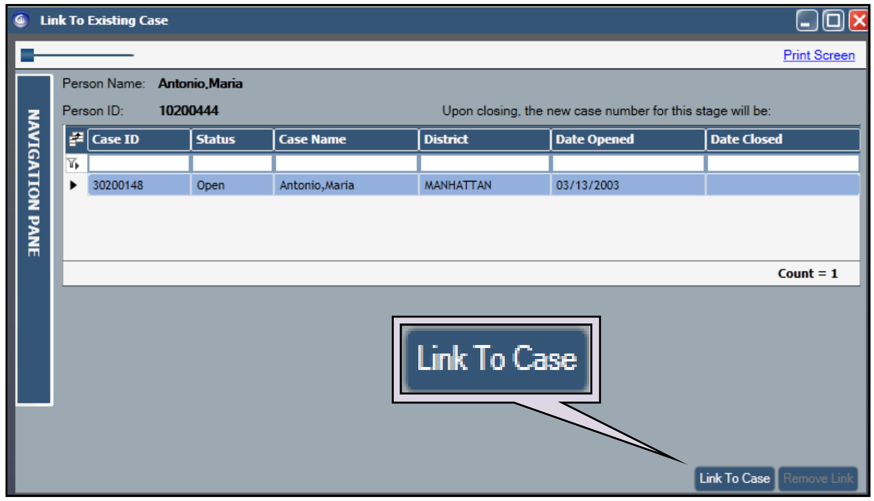
3. To link the FSI to the existing FAR case, select a person over age 18 from the **Person List** and click on the **Link To Existing Case** link in the navigation pane.

   The Link To Existing Case window displays

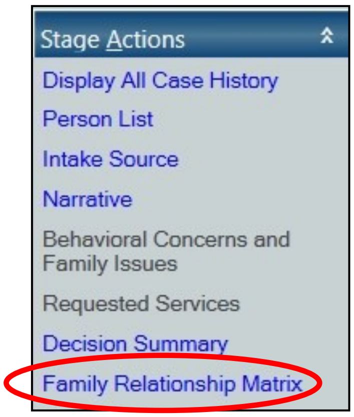
4. Highlight the case containing the FAR stage to which you wish to link this FSI. Links can be made to either open or closed cases.

5. Click the **Link to Case** button.

6. Verify that you wish to link the FSI and the resulting FSS stages to the listed case number by clicking the “Yes” button in the pop-up message.



Family Relationship Matrix



Complete the **Family Relationship Matrix** by clicking the link in the navigation pane.

- Accuracy is important (e.g., sibling vs. half-sibling vs. step-sibling) as these relationships are required for AFCARS reporting and drive information in the FSS Health Services window.
- When all relationships are complete, the Family Relationship Matrix link displays a “(C)” next to it.

Decision Summary

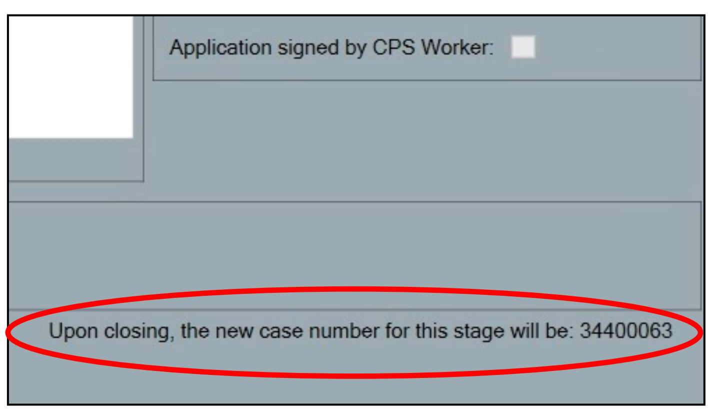
1. Record whether the case is being opened for Preventive Services only.
2. Record the dates the application was sent and received.

> **CAUTION! –** The date entered in the “Date LDSS Received Application Signed by Parent/Client” field will become the **Case Initiation Date** (CID), if it is the ***earliest*** of the 4 possible CID triggers. The CID is the earliest date that WMS payments can begin.

3. In the Decision field, choose “Open Family Services Stage” from the pull-down menu.

4. Verify that the FSI will be linked to the existing FAR case number.
5. If desired (or required by local protocol), click the **Submit for Review** link in the navigation pane to assign the FSI to another worker for review.

   Since only one worker may be assigned to an FSI at a time, this will remove the FSI from your workload and assign it to the chosen reviewer’s workload.



6. Click the **Create FSS** link in the navigation pane to close the FSI and stage progress it into the FSS.

The worker who does the stage progression is automatically assigned as the Case Manager of the FSS and the FSS will be linked to the same case number as the FAR stage.

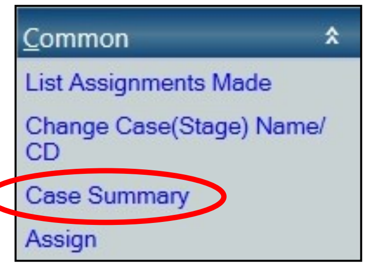
Merging an FSS to the FAR Case Number

If you create an FSI from the Record FSI command on the Intakes menu, but do not link it to the FAR case number prior to the FSI being stage progressed into an FSS, you can still associate the FSS to the FAR stage case number by completing a case merge.

Note: A case merge can only be done by a worker assigned the CASE MERGE/SPLIT business function.

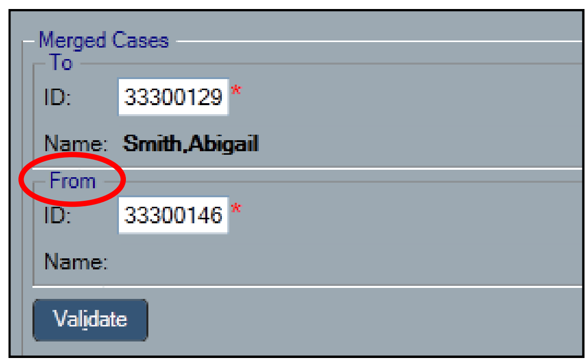
1. From the *Case Manager's* workload, note the case number of the FSS stage that you wish to merge with the FAR case number.

   HINT: if you right click on the listed case number you can then select "Copy" to write the information to the clipboard.



2. Highlight the FAR stage.
3. Click the *Case Summary* link in the navigation pane.
4. Highlight the FAR stage.

5. Click the *Case Merge/Split* link in the left navigation pane. The case number of the FAR stage will prefill in the "To ID" field.



6. Enter (or right click and paste) the FSS Case Number in the "From ID" field.
7. Click the **Validate** button.
8. Click the **Merge** button.
9. Click the **Save & Close** button.

   The merge will process in an overnight batch and the two stages will now be part of the same case number.

Resources

- CONNECTIONS Job Aids and Tip Sheets: http://ocfs.state.nyenet/connect/jobaides/jobaides.asp
- CONNECTIONS Regional Implementation Staff: http://ocfs.state.nyenet/connect/contact.asp
- CONNECTIONS Application Help Mailbox: ocfs.sm.conn_app@ocfs.state.ny.us

  (NOTE: this address contains an underline)

  *A Helpdesk ticket is now required before sending requests to the Triage Unit. This can be acquired by emailing **Fixit@its.ny.gov**.*

ITS Enterprise Service Desk
1-844-891-1786