



# CONNECTIONS Tip Sheet

## Uploading Family First Documentation

Implementation of the Family First Prevention Services Act (FFPSA) has resulted in a number of new requirements in CONNECTIONS. Among these is the requirement to upload and link documents related to a child’s placement in a Qualified Residential Treatment Program (QRTP) setting in the Health Services window. This tip sheet provides workers with information needed to upload and correctly label documents in CONNECTIONS in a timely way, thus allowing them to be easily retrieved for case reviews, audits and when preparing records for court.



**The uploading of documents into CONNECTIONS is a two-step process.** Documents are first uploaded from the uploads website to the worker’s My Uploads tab in CONNECTIONS. They must then be linked to a stage, Person (PID), Allegation, Progress Note or the Health module. **The upload process is not complete until this second step is completed!**

### Who Can Upload Documents?

- The worker must be assigned the **FILE UPLOAD business function** to upload documents to CONNECTIONS.
- Workers may upload documents to any stage to which they have access, HOWEVER, if a worker is uploading to a stage on someone else’s workload they must have the MAINT HEALTH business function to access the appropriate Health Services window.
- **The worker’s agency must have designated Health Responsibility.**

If a Voluntary Agency is the health responsible agency, the district will need to be designated instead. Workers with a role of Case Manager or Case Planner may designate Health Responsibility. After the uploads are complete, the voluntary agency will need to be designated again so they can continue to enter health information. See the *Designating Health Responsibility* Tip Sheet for additional information.

### What Must be Uploaded for Family First?

Per 21-OCFS-ADM-23, the following Family First documents must be uploaded to CONNECTIONS using the category and subcategory listed in the chart below.

Document	Uploads Category	Subcategory	Comments
QI Assessment (i.e., CANS or CASII)	Family First	QI Tools / Assessments	Required Upload
CANS Assessment and Summary Sheet (Excel)	Family First	QI Tools / Assessments	Required Upload
Qualified Individual Report (OCFS 5571) <b>AND/OR</b> Qualified Individual Summary Report (OCFS 5572)	Family First	QI Tools / Assessments	Required Upload

## Step 1: Uploading QRTP Documents into CONNECTIONS

1. Save the documents you wish to upload as PDFs on the PC or mobile device you will be using to access the My Uploads website.



The **QI Assessment Tool** must be saved as a PDF document before uploading or some pages of the document will be formatted incorrectly when viewed in CONNECTIONS. Saving as a PDF will resolve formatting problems for the assessment on page 3 of the CANS document. The narrative sections will still have formatting issues.

**Note:** The QI Assessment and CANS tool should be saved as separate documents in order to upload them separately and link them with the correct category and subcategory. Password protected documents must be unprotected before uploading.

2. Using CHROME or EDGE as your web browser, visit the secure My Uploads Website at:

**<https://cw.ocfs.ny.gov/connectionsupload>**

**Note:** Voluntary Agency users will be redirected to the NY.gov website, where you will be prompted to log in with your CONNECTIONS UPN (looks like an email) and CONNECTIONS password. Next, enter your RSA token code. You will then be redirected back to the My Uploads website.

3. Select the **Stage** which you would like to associate with the documents.



**Note:** Selecting a stage with which to associate the document helps locate and identify the file in your CONNECTIONS My Uploads tab, but **DOES NOT LINK** the photo/doc to a stage. That part of the process is done within CONNECTIONS.

Select the stage you wish to upload files to:

[Upload Without Stage Assignment](#)

	Stage Name	Stage
	Stage Name	Stage
<a href="#">Select</a>	<b>Client</b>	FSS
<a href="#">Select</a>		FSS

4. Select **Add files to upload** to browse your computer for the files you wish to upload.

5. Click once on the file name to highlight it, then click **open**.

*If multiple files are to be uploaded, hold down the Ctrl key while selecting up to a maximum of 10 files.*

*The file name(s) will appear at the bottom of the screen.*

6. When you have finished adding files, click the **Upload Files** button.

Comments :

[Add files to upload...](#) [Upload Files](#)

30 Day QI Assessment Report.docx

CANS .docx

Green checkmarks appear next to the documents and a green banner displays at the top of the page when the upload is complete.

*The documents have now successfully been uploaded to your My Uploads Tab in CONNECTIONS.*

30 Day QI Assessment Report.docx	✓
CANS .docx	✓

7. Optional: Open CONNECTIONS and verify that the documents display in the **My Uploads** tab.

Search Other Units/Workloads

My Workload My To-Dos **My Uploads**

[refresh list](#)

Photo/Doc	Stage ID	Uploaded By	Date File Created	Date Uploaded	Category	Sub-Category	Comments	Filename
<input checked="" type="checkbox"/> <a href="#">Open</a>	999999999	Worker Name	01/12/2022	06/01/2022	Family First	30-Day Assessment Tool	✓	CANS .docx
<input type="checkbox"/> <a href="#">Open</a>	999999999	Worker Name	01/12/2022	06/01/2022	Family First	QI Assessment	✓	30 Day QI Assessment Report

8. Return to your workload by selecting the **My Workload** tab.



**Reminder: THE FILE IS NOT YET LINKED TO A STAGE** and is not yet part of the case record. Continue to step 2!

## Step 2: Where to Link the QI Documents

1. On your **Workload**, select the stage to which the documents should be linked.

2. Click the **Health Services** link in the left navigation pane.

*The Health Services window displays.*

3. Click **OK** to acknowledge the confidentiality warning.

4. **Select the youth** to whom the documents apply.

5. Click the **Photos/Docs** link in the navigation pane.

- Click the **Add Photo/Doc** link.
- In the resulting types search window, choose **Non-Linked**.

The **Non-Linked search** will populate any photos/docs in your My Uploads tab to the grid. These are documents that have not yet been linked to a stage. Once a document is linked to the stage it no longer appears in the My Uploads tab.

Photo/Doc	Stage ID	Uploaded By	Date File Created	Date Uploaded	Category	Sub-Category	Comments	Filename
<input type="checkbox"/> Open	99999999	Worker Name	01/12/2022	06/01/2022	Family First	QI Assessment	✓	30 Day QI Assessment Re

- Click the **Search** button.
- Select the **QI Assessment** by checking the checkbox to the left of the file.
- In the **Category** drop-down menu, select **Family First**. In the **Subcategory** drop down menu, choose **QI Tools/Assessments**.
- Click the **Save** button.


*The upload is successfully linked to the Health Module and displays in the Photos/Docs window accessed from the Health Services window.*

**Reminder**

**If you DO NOT see Family First as a Category option, you DO NOT have the security to properly link the documents.** To troubleshoot, check whether you have a role on the stage or the MAINT HEALTH business function, **and** your agency has Designated Health Responsibility.

- Repeat steps 6-11 to upload the CANS-NY, choosing the category of **Family First**, and subcategory of **QI Tools/Assessments**.

	Photo/Doc	Stage ID	Uploaded By	Date File Created	Date Uploaded	Category	Sub-Category	Comments	Filename
<input checked="" type="checkbox"/> Open		01234321	Worker Name	02/24/2022	10/26/2023	Family First	QI Tools/Assessments	✓	OCFS-5571 QI Report Johnny
<input type="checkbox"/> Open		01234321	Worker Name	10/26/2023	10/26/2023	Family First	QI Tools/Assessments		CANS Tool, Johnny Smith, 1.

 **Note:** Due to the heightened confidentiality requirements for health information, documents in the Family First and Health categories will **NOT** appear when using the View All Photos/Docs link in the navigation pane from your Workload window.

## Correcting Common Mistakes

Search Photos/Docs

Health related photos/docs will not be displayed through this path.





**Photo/Doc Filter**

- All
- Allegation
- Person
- Progress Notes
- Stage

Search   Clear

If a Family First document was linked to the wrong stage, or the wrong place within a stage (e.g., linked to Person, Stage Photos/ Docs, or Progress Notes), locate the document using **View All Photos/Docs**.

Note the location of the document in the **Link Type** column.

	Photo/Doc	Stage ID	Uploaded By	Date File Created	Date Uploaded	Link Type	Category	Sub-Category
<a href="#">Open</a>				02/24/2022	06/09/2022	Person	Essential Documents	Birth Certificate
<a href="#">Open</a>				02/24/2022	06/09/2022	Stage	Essential Documents	Birth Certificate
<a href="#">Open</a>				02/23/2022	06/09/2022	Progress Notes	Correspondence	Letters
<a href="#">Open</a>				01/12/2022	06/09/2022	Stage	Correspondence	Reports/Updates from Servi

1. Go to the window where the file was incorrectly linked and **select the photo**.  
*The Unlink link enables.*
2. Click the **Unlink** link to return the photo/doc to the worker's **My Uploads** tab.
3. Begin at Step 2 on page 3 to correctly link the photo in the Health Services window.

Correct categorization of uploaded documents is also important. A document that has been linked to the wrong category or subcategory can be easily corrected by using the following steps:

1. From the Health Services window, open the **Photos/Docs** link in the navigation pane.
2. **Select the document** you wish to change.
3. Make the appropriate edits using the drop down boxes.
4. Click the **Save** button.

### Resources

- CONNECTIONS Job Aids and Tip Sheets: <http://ocfs.ny.gov/connect/jobaided/jobaided.asp>
- CONNECTIONS Regional Implementation Staff: <https://ocfs.ny.gov/connect/contact.asp>
- CONNECTIONS Application Help Mailbox: [ocfs.sm.conn\\_app@ocfs.state.ny.us](mailto:ocfs.sm.conn_app@ocfs.state.ny.us)  
*(NOTE: address contains an underline)*

ITS Enterprise Service Desk  
1-844-891-1786

*A Helpdesk ticket is now required before sending requests to the Triage Unit. This can be acquired by emailing [FixIt@its.ny.gov](mailto:FixIt@its.ny.gov).*