



CONNECTIONS Tip Sheet Foster Home Transfer Procedures

Revised November 2019

Foster homes may be transferred between districts, between agencies, from a district to an agency, or vice versa. Homes may be transferred prior to final certification/approval, including homes certified or approved on an emergency basis. This tip sheet is intended for home finders and other staff involved in the transfer of foster homes, including reopenings, and the associated changes needed in Activities and WMS.



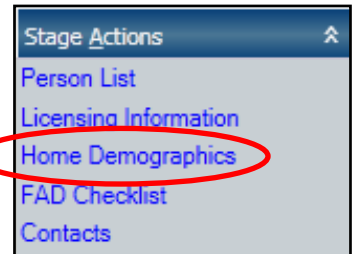
Note: Foster homes that are transferred between voluntary agencies or between a district and an agency require the assignment of a new Vendor Identification Number (VID). When a home is transferred between districts, the existing VID is used.

Agency to Agency, Agency to District & District to Agency Foster Home Transfers

◆ ◆ ◆ **Steps A, B & C are done by the SENDING AGENCY** ◆ ◆ ◆

A. Sending Agency Worker Records a New Vendor ID

1. Obtain the name of the receiving agency liaison staff person to coordinate the transfer of the home and the new Vendor ID that the receiving agency will be assigning to the home.
2. Select the FAD stage on the workload and click the **Home Demographics** link in the navigation pane.



The Home Demographics window opens.

3. On the Home Demographics window, record the Vendor ID number obtained from the receiving agency in the **Vendor ID** field.
4. Click the **Validate** button.
5. Click the **Accept** button.

6. Click the **Save & Submit** link in the navigation pane.

The To-Do Detail window opens.

7. On the To Do Detail window, document in the Comments field that the home is being transferred and the Vendor ID is being changed per the receiving agency.
8. Click the **Save & Close** button.

B. Sending Agency Unit Approver Approves the New Vendor ID

1. On your *My To-Dos* tab, locate the appropriate approval (\$\$\$Approve Primary and/or Business Address Change) to-do and click the **Navigate** link.

The Resource Address Detail window displays.

| Stage Name | Description | Created By |
|--------------|--|------------|
| Jones,Angela | DW - \$\$\$Approve Primary and/or Business Address Change - 20003926 | System |

2. Verify in the upper grid that the correct Vendor ID was entered, then close the window by clicking the red **X** button in the upper right of the window.

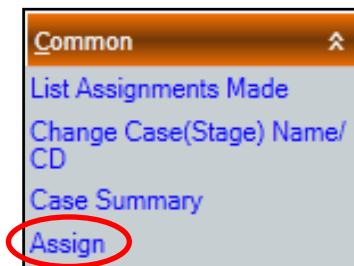
The Approval Status window displays.

3. Highlight your name and click the **Approve** button.
4. Click **No** to the pop-up message asking if you would like to add another approver unless local protocol requires otherwise.
5. Click the **Save & Close** button.

C. Sending Agency Worker Assigns a New Primary Worker



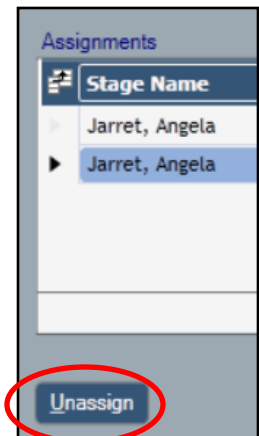
Note: You must wait until the next business day after approval of the new Vendor ID to assign a new Primary worker.



1. Select the FAD stage on the workload and click the **Assign** link in the navigation pane.

The Assign window opens.

2. Un-assign any workers with a role of *Secondary* by highlighting the worker's name in the Assignments grid, clicking the **Unassign** button to the lower left and the **Save** button for each.



3. Click the **Staff Search** link in the navigation pane.
4. Enter the last name of the Receiving Agency's worker in the **Last Name** field and their Agency Code in the **Agency** field.

5. Click the **Search** button.
6. Select the desired worker and click the **OK** button.

The Assign window displays.

7. Select the worker from the Available Staff grid at the top and click the **Primary** button.
8. Click **Yes** to the pop-up message confirming the removal of the current Primary worker.
9. Click the **Save & Close** button.

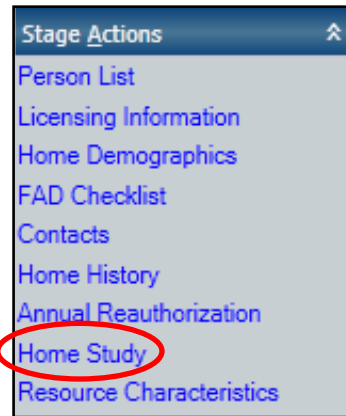
As of August 28, 2019, home studies must be completed using the *Final Assessment and Determination* form (OCFS-5183L).



See 18-OCFS-ADM-07 *Foster/Adoptive Home Certification or Approval Process* and 19-OCFS-ADM-12 *Foster Boarding Home Annual Reauthorization Process and Template* on the Policy Directives page of the OCFS Internet site for full details.

◆ ◆ **Steps D through K are done by the RECEIVING AGENCY** ◆ ◆

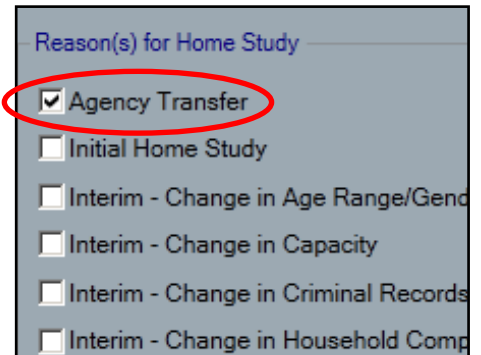
D. Receiving Agency Worker Completes and Records the Home Study



1. Select the FAD home on the workload and click the **Home Study** link in the navigation pane.

The Home Study window opens.

2. In the **Reason(s) for Home Study** list, check “Agency Transfer”.

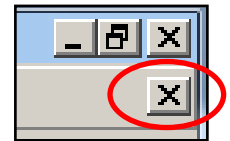


3. Click the **Narrative** link. In the navigation pane.

The Final Assessment and Determination template opens.

4. Complete the home study and form OCFS-5183.

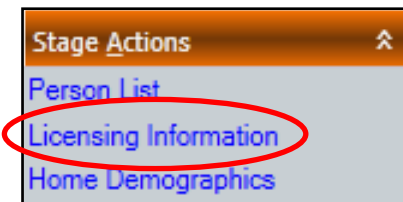
5. Click the **X** button to close and save the narrative window.



6. Click the **Save & Submit** link in the navigation pane to submit for Supervisory Approval.

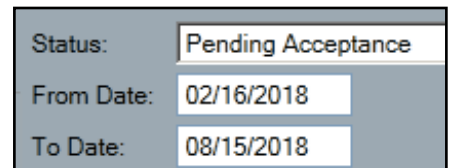
7. Click the **Save & Close** button on the To-Do Detail window.

E. Receiving Agency Worker Changes the Home Status



1. With the FAD stage selected on the workload, click the **Licensing Information** link in the navigation pane.

2. On the Home License window, select “Pending Acceptance” in the **Status** field.



3. Review the Authorization dates.

Recertification tasks must be completed prior to the certification To Date.

Recertification may begin within 90 days of the current certification To Date.

4. Click the **Save and Submit** link in the navigation pane.

5. On the resulting To-Do Detail window, verify that the To-Do is assigned to the appropriate worker/supervisor. Click the **Save & Close** button.

F. Receiving Agency Worker Verifies the Change in the Agency Designation

1. With the FAD stage selected on the workload, click the **Home Demographics** link in the navigation pane.
2. Verify the new agency designation in the **Auth. Agency** field.

| Current Home Demographics | |
|---------------------------|-------------------|
| Home Name: | Jones,Angela |
| Legal Name: | Jones,Angela |
| Setting: | Foster Home |
| Auth. Agency: | Onondaga County D |

G. Receiving Agency Worker Verifies the Vendor ID



Note: The Home License must be submitted for approval before this step can be completed.

1. Select the FAD stage on the workload.
The Case To-Dos tab enables below the workload grid.

| Case To-Dos | Stage Events |
|-------------------------------------|------------------|
| <input checked="" type="checkbox"/> | Jones,Angela FAD |

2. On the *Case To-Do* tab, locate the appropriate to-do (\$\$\$Approve Primary and/or Business Address Change) and click the **Navigate** link.

The Resource Address Detail window opens.

3. On the *Resource Address Detail* window, verify that the correct Vendor ID displays in the grid at the top.

| Type | Vendor ID | Street |
|----------|-----------|--------------|
| Primary | | 174 HOPE AVE |
| Business | 07270033 | 174 HOPE AVE |


4. Close the window clicking the red **X** button in the upper right of the Resource Address Detail window
The Approval Status window displays.
5. Highlight your name and click the **Approve** button.
6. Click **No** to the pop-up message asking if you would like to add another approver unless local protocol requires otherwise.
7. Click the **Save & Close** button.


H. Receiving Agency Supervisor Approves the Home License/Accepts the Transferred Home

1. On the *My To-Dos* tab, locate the appropriate Approve Home License to-do and click the **Navigate** link.
2. Click the **Licensing Information** link in the navigation pane. Review the information on the Licensing Information window for accuracy.
3. Close the window using the red **X** button in the upper right.
The Stage Summary window displays.

- Close the Stage Summary window clicking the red **X** button in the upper right.
The Approval Status window displays.
- Highlight your name and click on the **Approve** button.
- Click **No** to the pop-up message asking if you would like to add another approver unless local protocol requires otherwise.
- Click on the **Save & Close** button.

I. Receiving Agency Worker Changes the Authorization From Date

 **Note:** This step is only needed if the approval was completed **after** the effective date of transfer. You must wait at least one day after the above mentioned approvals to complete this step.

 **Note:** Only workers assigned the MAINT FAD HIST business function can adjust a home's history.

- Select the FAD stage on the workload and click the **Home History** link in the navigation pane.

The FA Home History window opens.

- On the FA Home History window, select the most recent historical record on the grid.

- Click **OK** to the message, that alerts you that only the Auth. From date may be modified.

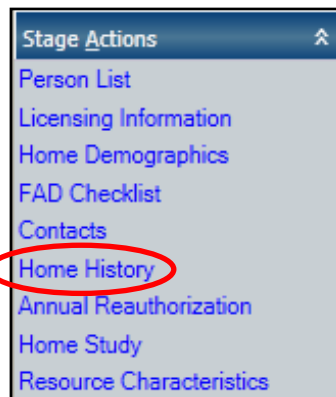
- In the Home History Detail section, change the **Auth. From** date to the effective date of transfer.

- Click the **Save & Close** button.

- With the FAD stage selected, select the **Licensing Information** link in the navigation pane.

The Home License window opens.

- Verify the new **Auth From Date**.



Home History Detail

Status: Auth From: Auth To:

Setting: Facility: Cap:

- Change the **Status** field to "Pending Acceptance".

- Click the **Save & Submit** link in the navigation pane.

The To-Do Detail window opens.

- Click the **Save & Close** button.

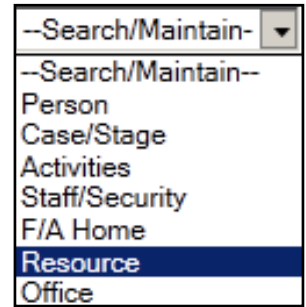
Status:

From Date:

To Date:

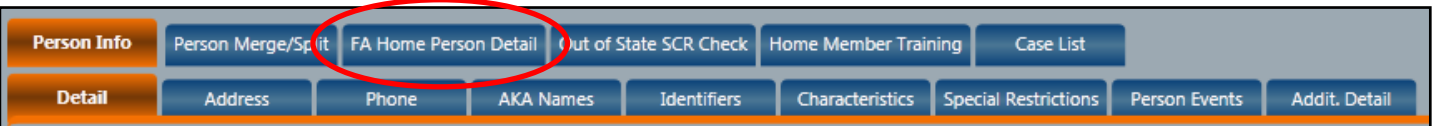


Note: It is good practice to conduct a Resource search from the Search/Maintain menu to verify that the FAD home is now active with your agency with the correct Vendor ID.



J. Review/Update Fingerprint, SEL & Medical Information

1. With the FAD Stage selected on your workload, click the **Person List** link in the navigation pane.
2. On the Person List window, select the person.
3. Click the **FA Home Person Detail** tab and review/update fingerprint, SEL and medical information as needed.

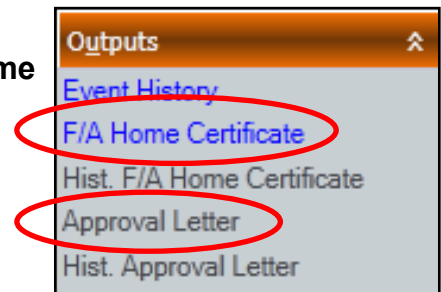


4. Click the **Save & Close** button.

K. Print a new Certificate to Board for Foster Boarding Homes or a new Approval Letter for Approved Relative Homes.

1. With the FAD Stage selected, click the **Licensing Information** link in the navigation pane.
The Home License window opens.

2. In the Outputs section of the navigation pane, select the **F/A Home Certificate** link to generate a Certificate to Board or the **Approval Letter** link to generate an Approval Letter.



The document opens.

3. Click on the printer icon to print the certificate or letter.



Note: Remember to complete form OCFS-4680, Notice to NYS OCFS of Foster Home Transfer Between Agencies, and submit it to OCFS.

When VIDs Change

When a foster home transfer results in the use of a new Vendor ID (VID), a number of additional steps must be taken to ensure correct payments continue and information in Activities is accurate:

- All existing WMS Purchase of Services (POS) lines for the old VID must be end-dated
- New POS lines must be written in WMS to the new VID.
- An exact search must be conducted in the Placement module to “place” the child(ren) with the new vendor.
- An administrative transfer must be entered in Activities (*see next page*).

Recording an Administrative Transfer

Whenever a foster home with active placements changes from one certifying agency to another, Activities must be updated for each child placed there to reflect the new location (VID) of the child and show that while the authorizing agency has changed, the child did not actually experience a move to a different foster home. This is done using a movement code of “M982 - Inter-Agency Transfer” with a Mod C of “TX - Admin Transfer/No Move”.

With the implementation of the Placement build, this code can no longer be entered manually in Activities. An exact placement search must be done to select the resource with the new VID, a referral sent and the child placed. Once the placement is verified, the correct code will be sent to Activities. Information is entered In Activities using the **Navigate** link in the Pending Activities Data Entry grid. Please be sure to follow local protocols regarding the entry of information in Activities.

District to District Foster Home Transfers



When a home is transferred between districts, a new Vendor ID is NOT required.

Complete the transfer process as outlined, above, beginning with Step C, *Assignment of a New Primary Worker by the Sending Agency*, on page 2.



Note: The home must be fully certified/approved (Step H) to change the authorized agency designation.

ACS Office of Placement Administration (OPA) Transfer Procedures

In New York City, the Administration for Children’s Services (ACS) manages foster home transfers as follows:

- A. The ACS Office of Placement Administration (OPA) creates the Emergency home in CONNECTIONS.
- B. The OPA worker assigns the Vendor ID, modifies any information, completes the F/A Home License window and submits the new foster home/stage to their supervisor for approval.
- C. Once the OPA supervisor approves the Emergency Approved Relative Foster Home, the home status changes to Emergency. ***The home is approved for a 90-day period.***
- D. The OPA supervisor determines whether the Division of Foster Care (DFCS) or a contract agency will supervise the home. The home is transferred to the appropriate Receiving Agency.



Note: The transferred home does NOT require a new Vendor ID.

- E. Upon receipt of a transferred FAD home, the Receiving Agency changes the FAD Home Status:
 1. Select the FAD stage on the workload and click the **Licensing Information** link in the navigation pane.
The Home License window opens.
 2. In the **Status** field, select “Pending Emergency”.

3. Click the **Save & Submit** link in the navigation pane.
The To-Do Detail window opens.
4. On the To-Do Detail window, verify the to-do is assigned to the appropriate approver.
5. Click the **Save & Close** button.

Multipurpose Homes



*Proposed transfers that involve a district's multipurpose home (Foster Home and/or Adoption Subsidy and/or KinGAP subsidy with a single VID) present a special situation. Because Adoption Subsidy payments must remain with a district, **a multipurpose home cannot be transferred**. A new home must be opened, any children residing there administratively transferred and the foster portion of the Multipurpose home then closed.*

If a multipurpose home with children currently placed in it wishes to transfer from the district to a voluntary agency, the following steps must be taken:

1. The Voluntary Agency must open a **new** foster home with a **new** VID. Since the same foster parents cannot be certified/licensed by two different agencies at the same time, the new home must be created **using new PIDs for the foster parents**.
2. Once the new voluntary agency home is in Accepted-Active status, the district conducts an exact placement search to record an administrative transfer for any foster children currently placed in their home. (See box at top of page 7 regarding Administrative Transfers.)
3. The district closes the foster care portion of the multipurpose home. The subsidy portion can remain open or be closed according to the district's usual practice. Subsidy homes do not have to remain open for subsidy payments to continue.
4. The district merges the newly created PIDS for the foster parents to the original PIDS, bringing the older PIDS forward. If the subsidy home has been closed, a request must be made to the CONNECTIONS Triage team, via the ITS Helpdesk (1-844-891-1786) to merge the PIDS.

This process leaves the district VID that is associated with the Adoption Agreement in the Adoption Subsidy Database available for future modifications, if needed.

Re-Opening a Foster Home – Generating a Different Vendor ID

When a previously closed home is re-opened by a different agency or district than the one that closed it, a new Vendor ID is needed. A new Vendor ID is not required when a home is re-opened by the same district or agency that closed it.

A. Re-Open the Closed Home

1. Select **F/A Home** on the Intakes dropdown menu.
The FA Home Search window opens.
2. Enter the name of the home (Last Name-coma-First Name with no spaces between) in the **Home Name** field.
3. Clear your agency code from the **Agency ID** field to conduct a statewide search.

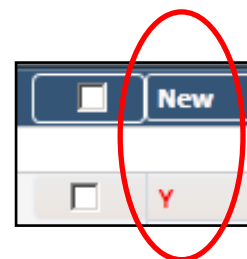
- Click the **Search** button.
- Select the foster home from the search results. Make sure the home is the correct one and meets your selection criteria.
- Click the **Re-open Closed Home** link in the navigation pane.
The Reopen Home window opens.
- Select "Inquiry" or "Applicant" as appropriate in the **Change To** field.



 A screenshot of a form with the following fields: "Current Status:" with a dropdown menu showing "Closed"; "Change To:" with a dropdown menu showing "Inquiry"; and "Closure Reason:" with a text box containing "P-Family Request". There is also a checkbox labeled "Subsidy Indicator" which is unchecked.

- Click the **Save & Assign** link in the navigation pane.
The Assign window opens.
- In the Available Staff grid, select the worker who will have primary responsibility for the foster home/FAD stage.
- Click the **Primary** button.
- Click the **Save & Close** button.

The stage displays at the top of that worker's workload with a red "Y" in the New column.



B. Change the Vendor ID

- Access the designated worker's workload.
- Select the FAD home.
- Click the **Home Demographics** link in the navigation pane
- Record the new Vendor ID in the **Vendor ID** field.
- Click the **Validate** button.
- Click the **Accept** button.
- Click the **Save & Close** button.
- Complete the Home Study process and all other certification requirements.

Reminder

All WMS requirements regarding new Purchase of Services (POS) line(s) and all Activities legal movement(s) must be completed for new Vendor ID changes.



The authorized agency designation will change once the home is fully certified/approved.

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>
- ITS Enterprise Service Desk 1-844-891-1786