



COMPLETING A PERSON SEARCH

~ QUICK STEPS ~

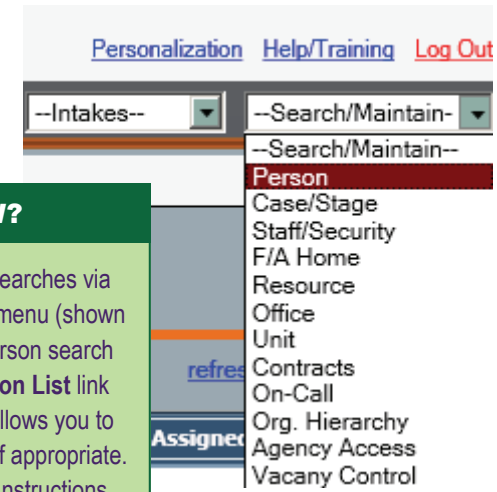
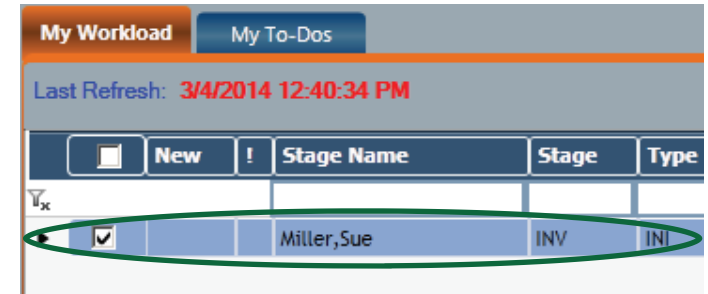
DETERMINING YOUR SEARCH FUNCTION

The first step in completing a comprehensive and accurate person search is to determine which search type to use:


- ⇒ **Phonetic Name** (default): The most common search type because it yields the most results and allows the best chance of finding an existing match in CONNECTIONS. A last name is required.
- ⇒ **Exact**: Returns results that precisely match the search criteria. A search for a non-identifier would include name or address, while a search using an identifier would include Social Security Number (SSN), Client Identification Number (CIN), or Person ID (PID).
- ⇒ **Phonetic Address**: Often used by caseworkers who might have only an address from the State Central Register (SCR) and wish to perform a search before they visit the site.

The more identifying information gathered from the family beforehand, the more efficient your search.

1 On the **My Workload** tab, select a stage in the grid.



DID YOU KNOW?
You can conduct quick person searches via the **Search/Maintain** drop-down menu (shown right). However, performing a person search from within a stage via the **Person List** link provides more information and allows you to add/relate a person to the stage, if appropriate. This handout provides detailed instructions for searching within a stage.

 This icon is used in this handout to indicate when a worker with an implied role in a stage can access and review information, in accordance with best casework practice. An implied role provides view-only access to another stage when there is a person in common (same PID) between stages. You will be alerted via the **My To-Dos** tab when you have an implied role in a stage.

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2

Click the **Person List** link on the **NAVIGATION PANE**.

Stage Actions

- Progress Notes
- Person List**
- Safety Assessments
- Risk Assessment
- Allegations
- Investigation Conclusion
- Safety Assessments for Case

My Workload My To-Dos

Last Refresh: 3/4/2014 12:40:34 PM

	New	!	Stage Name	Stage
<input type="checkbox"/>				
<input checked="" type="checkbox"/>			Miller, Sue	INV

3

On the *Person List* window, click the **Add Person** link to open a blank *Person Search* window.

Person List - Miller, Sue - S:28101609/C:38100824

Options

- New Search
- Add Person**
- Person Unrelate
- Remove Person - Added in Error

Case Name: Miller, Sue

Name	M/S		
Miller, Sue	R	02/09/1995	
Smith, Frank	V	01/26/1994	
Smith, Bobby	V	12/16/2011	

DID YOU KNOW?

With an individual selected in the grid, clicking the **New Search** link allows you to conduct a search on that stage member. You can use this method to confirm that the person is not known by another Person ID in CONNECTIONS.

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On the *Person Search* window, enter the person's name, then click **Search**.

Person Search

Person Search Criteria

Search Type: Phonetic Name First: Jackie M: Last: Walters

Address

Street: _____

PO Box/Apt: _____

State: _____ Zip: _____

Validate

DOB: ____/____/____ Age: _____

Phone: (____) ____-____

Race: _____

Sex: _____

Search Clear

DID YOU KNOW?

Adding data such as DOB, race, and/or sex to the search criteria will score your results more meaningfully than searching by name alone, allowing you to make better decisions about which matches to investigate further.

Phonetic Name (selected in this image) is the default search type and will yield the largest pool of results for you to locate an existing match in CONNECTIONS.

5

Select a name from the grid to display person information, then click the **Case List** tab.

Match Name	DOB	T	Sex	Person ID	County	Street	City	Race	SSN	Primary Name	Match	Score
Walters, Jackie	08/14/1939		F	15301837	ONONDAGA	550 TEALL AVE	SYRACUSE	Not Reported		Walters, Jackie	NAME	100
Walters, Jacqui	03/04/1940		F	13300302				Not Reported		Walters, Jacqui	NAME	57
Walters, Jacqui	08/14/1937		F	13300300						Walters, Jacqui	NAME	57
Walters, James	01/01/1950		M	13300301	ONONDAGA	487 OAK ST	SYRACUSE			Walters, James	NAME	49

The **Score** column indicates how closely the person matches your search criteria.

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Select a case from the grid to display case composition and case summary information.

Image	Merge	Status	Case Name	Case ID	Dist/Agy	Zone	Case Type
	M	OPN	Hill, Jean	35300538	ONONDAGA		SVC*



Notice that Jackie Walters is already known to the Jean Hill case. If you determine that this is a match and relate her to your case, you will have access to view the stages in the Jean Hill case.

Name	M/S	DOB	Age	Sex	Ethnicity	Race	Rel/Int	S
Walters, Jackie		08/14/1939	74	F	Not Reported	Not Reported	Grandparent	5
Hill, Jean		05/11/1979	34	F	Not Reported	Not Reported	Mother	5
Hill, George		10/12/1976	37	M	Not Reported	Not Reported	Biological Father	5

DID YOU KNOW? Clicking the **Case Summary** tab and selecting a stage from the grid allows you to view stage events. This will provide additional details, helping you decide if this is the right person. For more information, refer to the *Reviewing Person History* handout.

NEXT STEPS: DECIDING TO RELATE OR ADD
Close the *Person Search* window to return to the *Person List* window. Review the history for other persons listed in the grid, as needed. If a match is found, proceed to page 4 to *relate* the person to the case. If no match is found, continue to page 5 to *add* the person to the case.

Relating a Person Already Known to CONNECTIONS

1

On the *Person Search* window, select the person from the grid, then click the **Relate** button.

Person Search List

Match Name	DOB	T	Sex	Person ID	County	Street	City	Race	SSN	Primary Name	Match	Score
▶ Walters, Jackie	08/14/1939		F	15301837	ONONDAGA	550 TEALL AVE	SYRACUSE	Not Reported		Walters, Jackie	NAME	100
▶ Walters, Jacqui	03/04/1940		F	13300302				Not Reported		Walters, Jacqui	NAME	57
▶ Walters, Jacqui	08/14/1937		F	13300300						Walters, Jacqui	NAME	57
▶ Walters, James	01/01/1950		M	13300301	ONONDAGA	487 OAK ST	SYRACUSE			Walters, James	NAME	49

Count = 4

2

On the **Detail** tab, complete the **Type** and **Rel/Int** fields, then click the **Save & Close** button.

Person Info

Detail

First: Jackie M: Last: Walters Sfx: Status: **Active**

Current Stage

Type: PRN Role: Rel/Int: Aunt/Uncle

Demographics

Sex: Female Language: English Ethnicity: Race: Black or African Ame, Caribbean, Haitian, Native African, Other - Black or Afr, Alaskan Native, American Indian, Asian, Chinese

DOB: 08/14/1937 Age: 76

Address

Type: RS Street: 550 TEALL AVE

The individual now displays on the *Person List* window for the case.

Case Name: **Miller, Sue** Stage: **INV**

Name	M/S	Sch	DOB	Approx	Sex	Type	Role	Rel/Int	Person ID	Date Added
▶ Miller, Sue		R	02/09/1995		F	PRN	AS	Mother	18102130	08/17/2010
▶ Walters, Jackie		R	08/14/1939		F	PRN	UK	Aunt/Uncle	13300303	03/04/2011
▶ Smith, Frank		V	01/26/1994		M	PRN	AS	Biological Father	18102131	08/17/2010
▶ Smith, Bobby		V	12/16/2011		M	PRN	MA	Child	18102132	08/17/2010

Count = 4

Adding a Person to CONNECTIONS

1 On the *Person Search* window, click the **New** button.

Person Search Criteria

Search Type: Phonetic Name First: Jackie M: Last: Walters

Address: Street, PO Box/Apt, City, State, Zip, County

Identifiers: Type

DOB: / / Age: Phone: Race: Sex: Validate

Search Clear

Person Search List

Match Name	DOB	T	Sex	Person ID	County	Street	City	Race	SSN	Primary Name	Match	Score
No match found for the criteria entered												

Count = 0

Relate New

If your search returned no results in the grid or results that you determined were not a match, use the **New** button to add the person to the stage.

2 On the **Detail** tab, complete all required fields, then click the **Save & Close** button.

Person Info

Detail

Update any other person information, as needed.

First: Jackie M: Last: Walters Sfx: Status: Active

Current Stage: Type: PRN Role: Unknown Rel/Int: Aunt/Uncle

Demographics: Sex: Female Language: English Ethnicity: Race: Black or African Ame, Caribbean, Haitian, Native African, Other - Black or Afr, Alaskan Native, American Indian, Asian, Chinese

DOB: 08/14/1937 Age: 76

Address: Type: RS Street: 550 TEALL AVE

The individual now displays on the *Person List* window for the case.

Case Name: Miller,Sue Stage: INV

Name	M/S	Sch	DOB	Approx	Sex	Type	Role	Rel/Int	Person ID	Date Added
Miller,Sue		R	02/09/1995		F	PRN	AS	Mother	18102130	08/17/2010
Walters,Jackie		V	08/14/1939		F	PRN	UK	Aunt/Uncle	13300303	03/04/2014
Smith, Frank		V	01/26/1994		M	PRN	AS	Biological Father	18102131	08/17/2010
Smith, Bobby		V	12/16/2011		M	PRN	MA	Child	18102132	08/17/2010

Count = 4