



# CONNECTIONS Tip Sheet

## Creating a FAR Associated FSS

During the course of a 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.



**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. From 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 on the **Case List** tab.
5. Highlight a case with the status of "OPN".
6. Click the **Case Summary** tab.
7. Check to see if the open stage has a stage type of FSS.

Comp	Case To-Dos	Case Events	Case Summary								
Case ID: 34600050 Case Manager: Wilson110,Darryl Dist/Agy: 031											
Status: Open Start Date of Case: 7/7/2009											
Merge	Stage Name	Stage	Type	County	Zone	CD	PGM	Opened	Closed	SEC	Wor
	Adams,Maggie	FSS	CWS	031			CPS	04/24/2009			Wils
	Adams,Maggie	FSI	CWS	031			CPS	04/24/2009	04/24/2009		Wils

8. Check all persons. If no open FSS exists, there are 3 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 be created automatically from a FAR stage when the closure reason is "Closed; assistance provided, preventive case opened".

1. From 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".

Family Assessment Response Conclusion - Smith, Abigail - S:23300175/C:33300129 [Unsaved Changes]

Case Name: Smith, Abigail

FAR Dates

Intake Received: 12/03/2013 11:35 AM

Incident Occurred:

Determination: Family Assessment Response

Closure Reason:

Switch track from F

High Risk Comments:

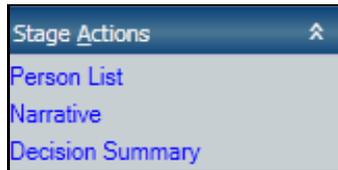
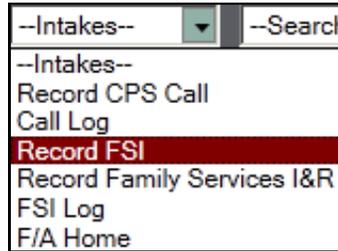
- Closed; no assistance needed
- Closed; family declined assistance
- Closed; assistance provided, additional services declined/not needed
- Closed; assistance provided, family linked to community resources
- Closed; assistance provided, preventive case opened**
- Closed; cannot locate/moved out of district
- Closed; other (see notes)

4. Click the Submit link in the left navigation pane.
5. When the closure is approved, an FSI is automatically created and will appear on your workload under the same Case Number as the FAR stage from which it was created.

## Create an FSI and Link it 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.

1. Use the Intakes pull-down menu on the upper right of the main CONNECTIONS toolbar to select "Record FSI".
2. The FSI Intake Source window automatically opens for you to begin recording information, though a different section may be selected using the links in the navigation pane.



FSI windows may be completed in any order., however, you will not be able to create an FSS (the **Create FSS** link will not enable) until all FSI windows are complete.

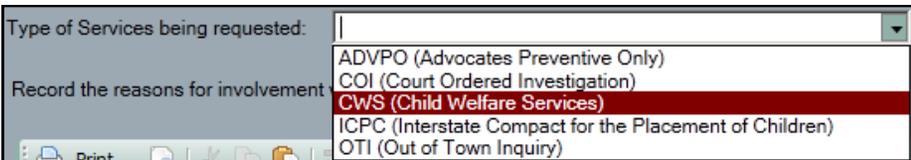
When a Family Service Intake is created from the Record FSI command, a new Case Number and Stage Number are created for the FSI. No information is pre-filled when the FSI is created in this manner; all data must be manually entered.

### Intake Source

The Intake Source window captures information about the person creating the FSI. Please note: a phone number is required 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)"



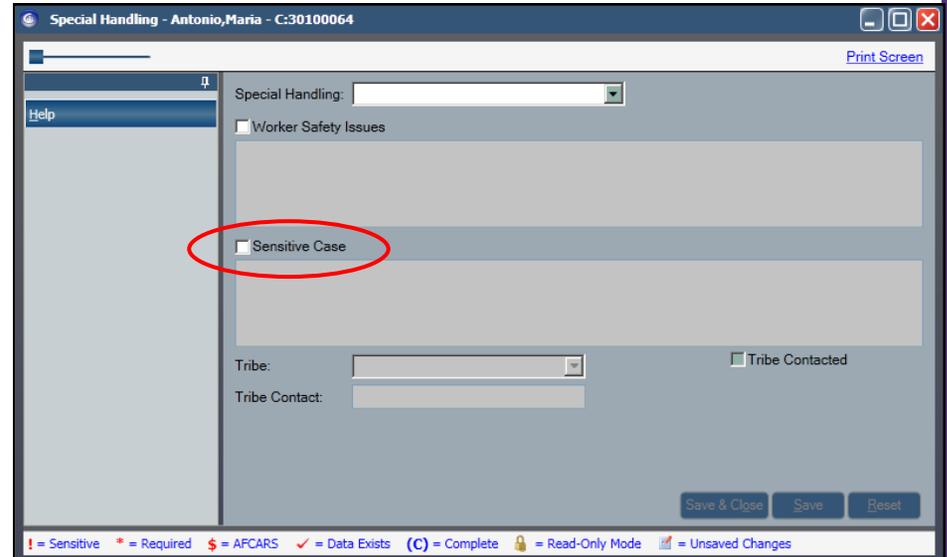
Record the reasons for involvement with this family and why services are needed. Once saved, narrative entries cannot be modified. Addi-

tional narratives, though, may be added. Each additional narrative will be stamped with the worker's name and the date and time added.

In the narrative, clearly summarize the presenting needs of the individual/family and document the corresponding need for services. Information entered in the FSI Narrative will be brought forward to the Family Update section of all future FASPs as Original Reason for Case Opening.

If appropriate, a case can be marked as sensitive by clicking the **Special Handling** link. In the navigation pane of the Narrative window.

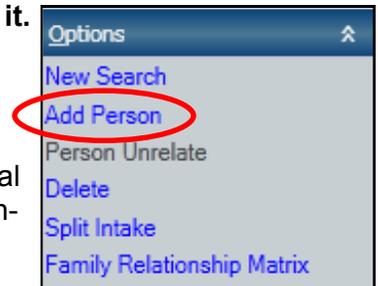
In the *Special Handling* window, check the sensitive case checkbox and enter an explanation as to why the case is being marked as such.



**Note:** This action marks the entire case – not just the FSI stage – as sensitive and will restrict access to it.

### Person List

1. Using the **Add Person** link, add all household members plus the biological parents of any tracked children, whether or not they live in the household.



Clicking this link will initiate a person search of the database.

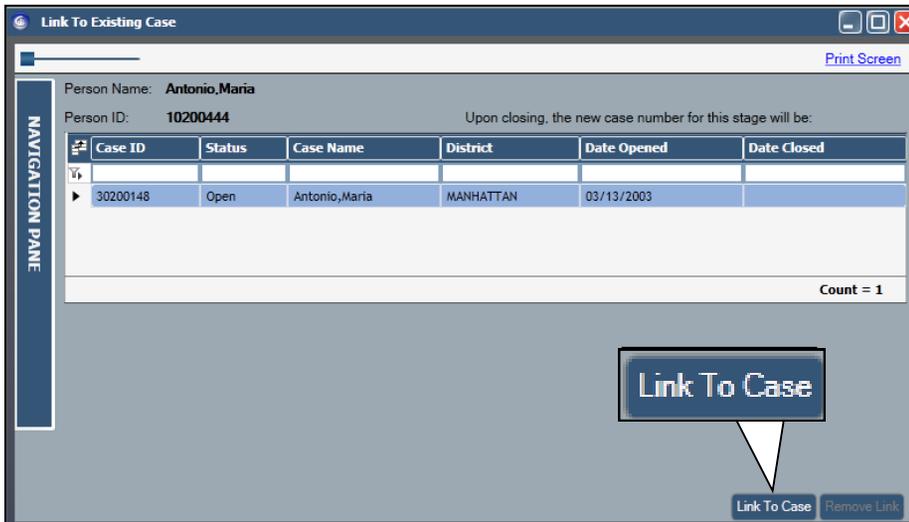
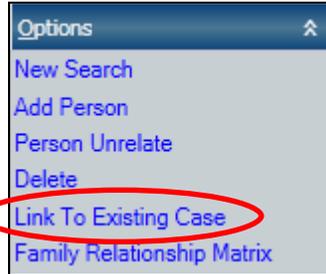


Remember to explore all possible matches as the person may have more than one existing PID. Multiples should be merged to keep all history together under a single PID.

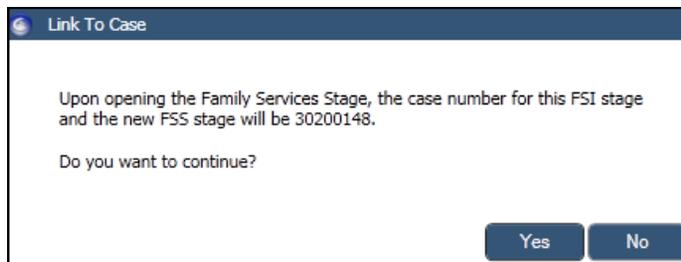
2. To link the FSI to the existing FAR case, select a person over age 18 from the **Person List** and click on the **Link To Existing Case** link in the navigation pane.

3. In the resulting window, 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.

4. Click the Link to Case button.



5. Verify that you wish to link the FSI by clicking the “Yes” button.



## Family Relationship Matrix

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

- Accuracy is important (e.g. sibling vs. half-sibling vs. step-sibling) as these relationships drive information in the FSS Health Services window.
- When complete, the Family Relationship Matrix link should display a “(C)” to the right of it.



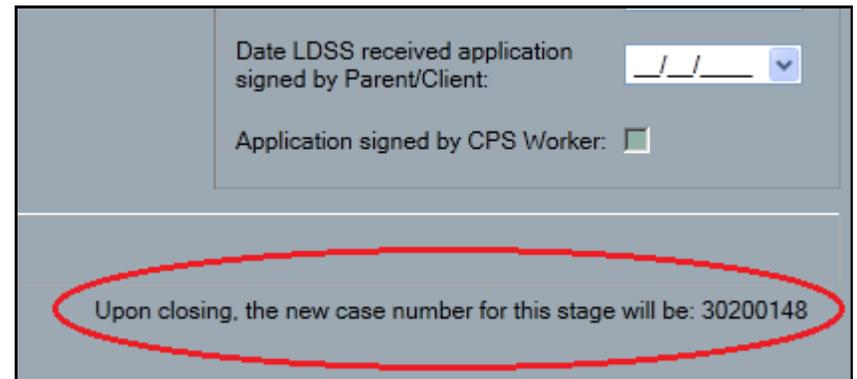
## Decision Summary

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.



- If desired or required by local protocol, click the **Submit for Re-view** link in the navigation pane to assign the FSI to another worker for review. This will remove the FSI from your workload and assign it to the chosen reviewer's workload.
- Click the **Create FSS** link in the navigation pane to stage progress the FSI and create the FSS. The FSS will automatically be assigned to the worker who did the stage progression and will be linked to the same case number as the FAR stage.

### Create an FSS and Merge it to the FAR Case Number

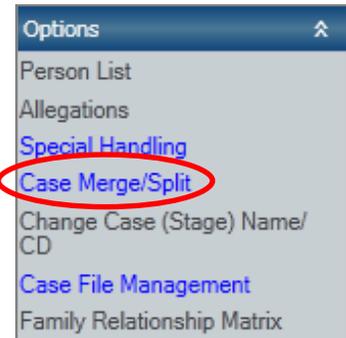
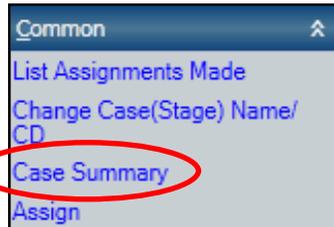
If you create an FSI from the Record FSI command on the Intakes menu, but do not link it to another case prior to stage progressing it into an FSS, you can still associate the FSS to the FAR stage case number by completing a Case Merge.

Case merges can only be done by someone assigned the Case Merge/Split business function.

- From your 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 case number you can then choose "Copy".

- Highlight the FAR stage.
- Click on the *Case Summary* link in the navigation pane.
- Highlight the FAR stage.



- Click on the *Case Merge/Split* link in the left navigation pane. The case number of the FAR stage will prefill in the "To ID" field.
- Enter (or right click and paste) the FSS Case Number in the "From ID" field.

- Click the Validate button.
- Click the Merge button.
- 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.

### 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](mailto:ocfs.sm.conn_app@ocfs.state.ny.us)  
(NOTE: address contains an underline)
- CONNECTIONS Communications Mailbox:  
[connections@ocfs.ny.gov](mailto:connections@ocfs.ny.gov)

ITS Enterprise Service Desk  
1-800-697-1323