

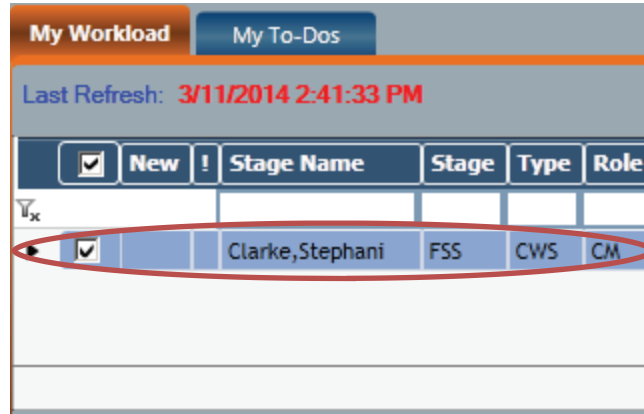


CONNECTIONS

REVIEWING PERSON HISTORY via FSS STAGE

~ QUICK STEPS ~

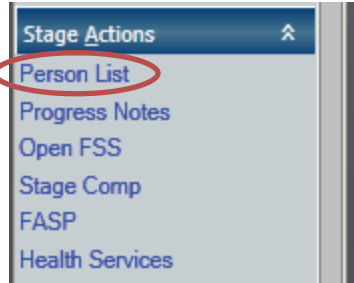
1 On the **My Workload** tab, select the appropriate Family Services Stage (FSS).



On the Person List window, you can access the Case List, Case Summary, and Stage Events to review history for individuals known to CONNECTIONS.


Using fictional character Stephanie Clarke's Family Services Stage (FSS), this tip sheet details the steps to access the Person List and navigate among its sub-tabs to review history for an individual.

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

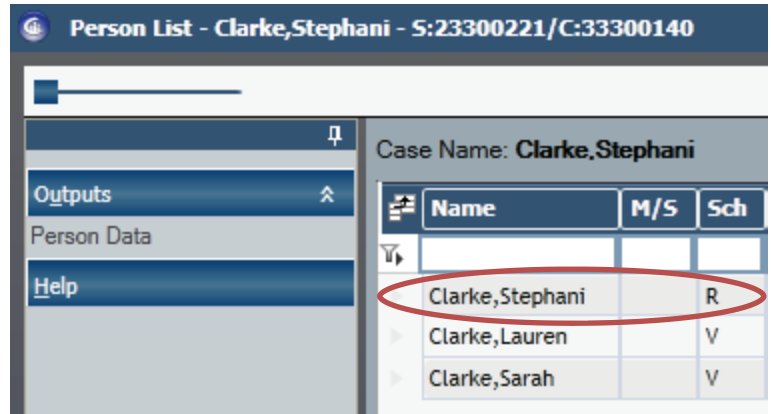


DID YOU KNOW?

You can get a more comprehensive view of a person's history in CONNECTIONS via the Person List, rather than from the **Case Summary** tab of the FSS.

 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.

3 On the *Person List* window, select a name in the grid to display the sub-tabs (e.g., Person Info).



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4 Click the **Case List** tab to view a list of all cases to which the person is known.

▶	Clarke,Stephani	R	05/23/1990		F
▶	Clarke,Lauren	V	05/23/2000		F
▶	Clarke,Sarah	V	05/23/2005		F

Person Info Person Merge/Split **Case List**

Detail Address Phone AKA Names

First: Stephanie M: Last: Clarke

Current Stage

5 Select a case in the grid to display the case information sub-tabs.

Merge/Split Case List

Status	Case Name	Case ID	Dist/Agy	Zone	Case
OPN	Hill,Jean	38001006	ONONDAGA		SVC
OPN	Collins,Kristy	37200000	ONONDAGA		SVC*
OPN	Clarke,Stephani	33300140	ONONDAGA		SVC

Notice Stephanie's involvement in the Jean Hill and Kristy Collins cases. That means you have an implied role in those cases because Stephanie Clarke is known to them. You have view-only access to history for these cases.



6 Click the **Case Summary** sub-tab to view a list of all stages within the selected case.

▶			OPN	Collins,Kristy	37200000	ONONDAGA
▶			OPN	Clarke,Stephani	33300140	ONONDAGA

Comp Case To-Dos Case Events **Case Summary**

Name	M/S	DOB	Age	Sex	Ethnicity	Rac	
▶							
▶	Clarke,Stephani		05/23/1990	23	F	Non-Hispanic	Whit
▶	Collins,Kristy		02/19/1981	33	F	Not Reported	Not I

7

Select a stage in the grid to display the stage information sub-tabs.

Comp	Case To-Dos	Case Events	Case Summary					
Case ID: 37200000		Case Manager: Wilson, Darryl						
Status: Open		Start Date of Case: 6/25/2009						
Merge	Stage Name	Stage	Type	County	Zone	CD	PGM	Opened
	Collins, Kristy	FSS	CWS	031			CPS	04/24/2009
	Collins, Kristy	FSI	CWS	031			CPS	04/24/2009
	Collins, Kristy	INV	INI	031			CPS	04/24/2009

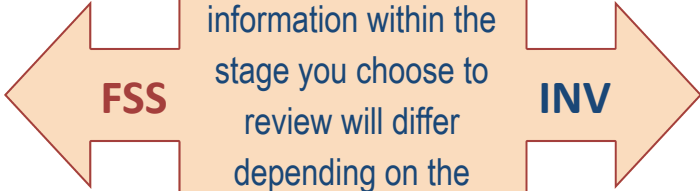
DID YOU KNOW?

Family Assessment Response (FAR) stages are also viewed from the "Stage Summary" event.

FSS stages are viewed from the "Family Services Stage Opened" event on the Stage Events tab.

The appearance of information within the stage you choose to review will differ depending on the stage type.

INV stages are viewed from the "Stage Summary" event on the Stage Events tab.



Event Date	TX Date	Status	Type	Description
06/25/2009	06/25/2009	COMP	Stage	Family Services Stage Opened
06/25/2009	06/25/2009	COMP	Assignment	Case Manager Assignment Issued For: Wilson10,Darryl of Cnty/Agy: 031

Event Date	TX Date	Status	Type	Description
06/25/2009	06/25/2009	COMP	Summary	Stage Summary

Case To-Dos Stage Events

From : To : Search [refresh list](#)

Event Date	TX Date	Status	Type	Description	Stage	Stage Name	Stage ID	Person	Entered By
06/25/2009	06/25/2009	APRV	Fasp	FASP Submitted for approval	FSS	Collins,Kristy	2720000		Wilson,Darryl
06/25/2009		COMP	Stage	Family Services Stage Opened	FSS	Collins,Kristy	27200003		Wilson,Darryl

Count = 11

8 Use the available tools to locate and select the event, then click the **Detail** link.

AVAILABLE TOOLS

- ⇒ Scroll through the list of events using the **scrollbar** to its right.
- ⇒ Narrow the list of events by entering a date range in the **date picker drop-down fields**.
- ⇒ Filter for specific stage events using the **filter row**.

For example, type one of the following in the blank field below the **Description** column header:

- For INV stage: **“S”** for Stage Summary; **“I”** for Investigation Conclusion
- For FSS stage: **“FAM”** for Family Services Stage Opened; **“FAS”** for FASP Submitted for Approval
- For FSI stage: **“REC”** for Record FSI
- For FAR stage: **“S”** for Stage Summary

When the “Family Services Stage Opened” event is selected, you will use the tabbed format of the *Family Services Stage* window to navigate to review person information.

Family Services Stage - Collins,Kristy - S:27200003/C:37200000

File Options Reports Help

Case Name: Collins,Kristy Case Initiation Date: 4/24/2009

Stage Composition	Family Assessment and Service Plan	Service Plan Review	Progress Notes	Permanency	Case Summary	Education	Health Services			
Person List										
Last Name	First Name	Middle Name	Suffix	Person Id	M/S	Sch	*DOB	Approx	Age	I
Collins	Kristy			17200001		V	02/19/1981	No	33	f

When an agency worker selects an Investigation stage from the **Case Summary** tab, this disclaimer will display. It serves as a reminder that very sensitive information is being accessed, which should only be viewed by and shared with those with a business-related need-to-know. **Additionally, the information should not be copied or printed.**

The screenshot shows a software interface with three tabs: "Comp", "Case Events", and "Case Summary". The "Case Summary" tab is active. It displays the following information:

- Case ID: 37200098
- Status: Open
- Start Date: [blank]

Below this information is a table with columns: Merge, Stage Name, Stage, Type, County, and Zone. The table contains three rows:

Merge	Stage Name	Stage	Type	County	Zone
	Collins, Kristy	FSS	CWS	031	
	Collins, Kristy	FSI	CWS	031	
	Collins, Kristy	INV	INI	031	

To the right of the table is a disclaimer box titled "Case Summary" with the following text:

You are accessing a Child Protective Services (CPS) case. Information found in a CPS case, including identifying information regarding the source of the report or the person who made the report is confidential and may only be re-disclosed where authorized by law. If any reporter or source information is disclosed to you, either through your work on the case or in reviewing the case record, you may not re-disclose such information, unless authorized to do so by the written consent of the source or the reporter, by court order or as otherwise authorized by law to do so.

An "OK" button is located at the bottom right of the disclaimer box.

When the "Stage Summary" event is selected, the *Stage Summary* window provides access to INV stage windows using links in the **NAVIGATION PANE**. You can also select an individual from the grid and use the **Person Info** tabs that display to locate specific information.

The screenshot shows the "Stage Summary - Collins, Kristy - S:27200001/C:37200000 [Read Only]" window. It features a navigation pane on the left and a main content area.

Navigation Pane:

- Options
- Case Summary
- Review Intake
- Allegations
- Investigation Actions
- Safety Assessments
- Risk Assessment
- Progress Notes
- Investigation Conclusion
- Help

Main Content Area:

- Stage: INV
- Classification: CPF
- Report/Intake Date: 6/25/2009
- Stage Type: INI

Below this is a table with columns: Name, M/S, Sch, DOB, Approx, Sex, Type, Role, Rel/Int, Person ID, and Date Added. The table contains five rows:

Name	M/S	Sch	DOB	Approx	Sex	Type	Role	Rel/Int	Person ID	Date Added
Collins, Kristy		V	02/19/1981		F	PRN	AS	Mother	17200001	04/24/2009
Collins, Thomas		V	11/24/1972		M	PRN	AS	Biological Father	17200002	04/24/2009
Clarke, Stephani		R	05/23/1990		F	PRN	UK	Aunt/Uncle	18002534	03/11/2014
Collins, Patrick		V	04/22/2000		M	PRN	MA	Child	17200003	04/24/2009

At the bottom right of the table, it says "Count = 6".

Below the table are several tabs: "Person Info" (locked), "Detail" (locked), "Address", "Phone", "AKA Names", "Identifiers", and "Characteristics".

DID YOU KNOW?

Clicking on the **Allegations, Safety Assessments, Risk Assessment, Progress Notes, and Investigation Conclusion** links can provide you with information on the individual's involvement in the investigation.