



CONNECTIONS Tip Sheet

Activities Task Tips

updated December 2020

Several common tasks in the CONNECTIONS Activities Window have proved challenging to eligibility staff and other workers responsible for entering Activities data. This tip sheet provides guidance on completing these tasks. For additional information on the Activities window, please refer to the Getting to Know the CONNECTIONS Activities Window Build Job Aid, available on the CONNECTIONS website and in the Helpful Info tab within CONNECTIONS.

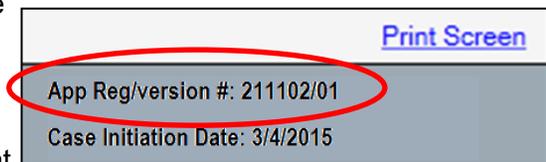
Opening a Track in Activities

A new Activities track should be opened when services are starting for a child and there is no currently open track.



While downstate voluntary agency staff assigned the Maintain Activities business function may enter Activities data, only district staff with this business function can open or reopen an Activities track. Data entry upstate is done only by districts.

Because of the CONNECTIONS – WMS interface, a track cannot be opened in the Activities Window until **after** the WMS Case batches overnight and the WMS case number displays in CONNECTIONS.



The display of an App-Reg version number indicates that the WMS opening has not batched and an Activities track cannot yet be opened.

Reopening a Closed Track

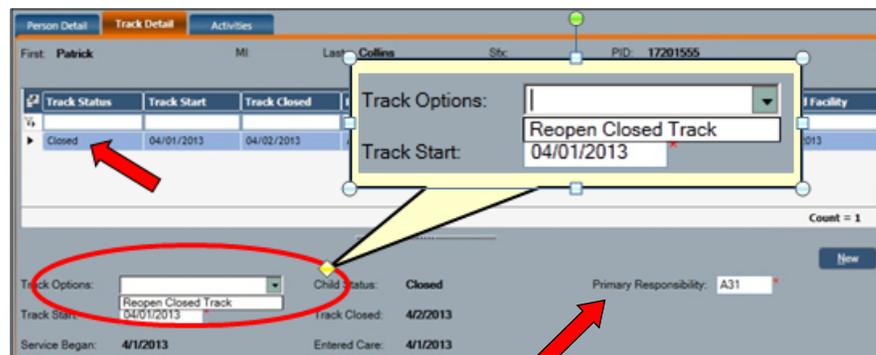
In certain situations, a track that has been closed by the entry of an M999 may need to be reopened. You would reopen a closed track (formerly known as a Y Track Indicator) if the child has continually been in receipt of services. This might be necessary if:

- the M999 was entered in error
- the child/case is transferred to a new district
- a new stage and WMS case is opened for a child freed for adoption.

Step-by- Step: Reopening a Closed Track in Activities:

1. Search for the child by their WMS case number.
You cannot locate the child by their CIN number if they have a new WMS case number.
2. Select the child whose track you wish to reopen.
3. Click the **Track Detail** tab.
4. Select the track on the top line on the grid.
There may be multiple closed tracks but, only the most recent track can be reopened.
5. In the **Track Options** field, select “Reopen Closed Track” from the drop down menu.

The Track Start field prefills with a date equal to the day after the M999 date.



*The **Primary Responsibility** field will populate with the logged-on worker’s agency code. Only the district can assign primary responsibility to another district or voluntary agency code by modifying the agency code here.*

6. Click the **Save** button.

A memo entry will be system generated on the child's Activities tab indicating the M999 has been deleted and the track has been reopened.

Reopening a Closed Track for a Freed Child

When the Case Manager indicates that a child is completely freed for adoption in the Family Services Stage (FSS), CONNECTIONS automatically end-dates the child from that stage and creates a new Child Case Record (CCR) stage. An M999 must be manually entered in the Activities window to close the child's track.

The new CCR stage requires the opening of **new** companion WMS case. Once the CCR has been created and the new WMS case opening has batched, the child's track in the Activities window must be **reopened** to preserve the history of legal events, placements and movements.



It is important to reopen the established track, rather than opening a new track, so that legal authority and other Activities are preserved, thus avoiding payments becoming Non-Reimbursable.

Follow the steps under *Reopening a Closed Track*, being sure to **search for the child by their new (CCR related) WMS case number instead of their CIN**. Searching by the child's CIN will return a result of "No match found for criteria entered."

A New Track was Opened Instead of Reopening the Previously Closed Track

The situation of a new track having been opened when a previous track should have been reopened, is easily remedied by following the steps under *Reopening a Closed Track*. The reopening will system generate a memo entry on the Activities tab indicating the M999 has been deleted and the track has been reopened.

Date	Activity	Event	Modifier A
07/01/2009	Memo	MEMO - MEMO ENTRY	DLT M999
04/24/2009	Miscellaneous	TOTO - TRACKING START DATE	X

Converting a Track Start Date

The Tracking Start Date (TSD) is the date that services were initiated for a particular child.

It may be necessary to correct a child's TSD if it was entered incorrectly. For example, a worker opens the track for a child but mistakenly uses a Tracking Start Date of 3/8/15 instead of 3/18/15.

Step-by-Step: Correcting the Tracking Start Date:

1. Click the **Track Detail** tab.
2. Highlight the child's track.
3. In the **Track Options** field, select, "Convert Track Start Date" from the drop down menu.

Track Options: Convert Track Start Date
Child Status: 01 - Tracked
Track Start: 03/08/2015 *
Track Closed:
Service Began: 3/8/2015
Entered Care: 3/8/2015

4. Enter the correct date in the **Track Start** field.
5. Click the **Save** button.

Modifying an Activities Case Initiation Date (CID)

The Activities Case Initiation Date (CID) is the date when services were initiated for a case/family. For new cases, the Activities CID prefills with the CONNECTIONS CID date.

The CID in the Activities window can precede and/or differ from, the CID in CONNECTIONS and from the WMS case opening date.

When opening a track for an child in the Activities window, the child's Tracking Start Date cannot precede the Activities CID date.

If services for a child preceded the Activities CID date, a two-step process is required; first, to open the child's track, and then to modify the Activities CID date.

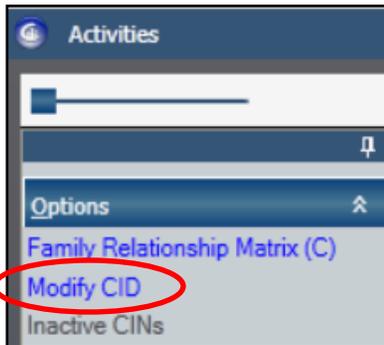


Only District workers who are assigned the Modify CID Business Function can change an Activities window CID.

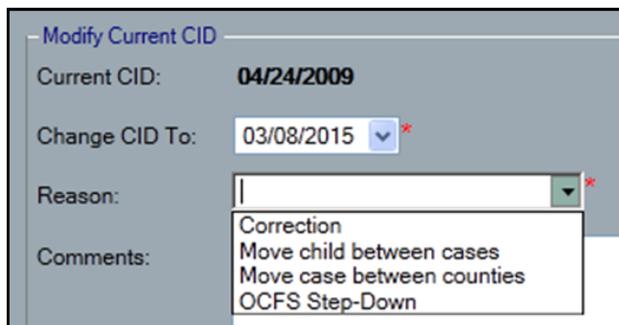
Step-by-Step: Modifying an Activities CID:

1. In the Activities window, search for a child/family record.

2. Click the **Modify CID** link in the navigation pane.



3. On the Modify CID window, enter a date in the **Change CID To** field that is either the TSD of the child's prior track or an earlier date.



4. Select the reason for the correction in the **Reason** field.

5. In the **Comment** field, enter a brief explanation of why the change is being made.

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

Adding a Child with an Existing Track to Another Case

There are situations when a child with an existing Activities track needs to be added to a different Family Services Stage. A child, for example, who receives services under one parent's FSS, then moves to their other parent's household would need to be added to the other parent's FSS and WMS cases and tracked there .

Step-by-Step: Tracking a Child in a Different Family Services Stage:

1. Verify that all necessary progress notes have been entered, casework contacts documented and PHRs finalized for the child in the existing Family Services Stage (FSS).

2. End-date the child from the Person List in the current FSS.
CONNECTIONS sends a transaction to WMS, deleting the child from the associated WMS case.

3. On the **Activities** tab of the Activities window, enter an M999 code to close the child's track.

4. Add the child to the Person List of the new FSS.
CONNECTIONS sends a transaction to WMS, adding the child to the WMS case. This requires an overnight batch to fully process.

5. Follow the instructions under the Reopening A Closed Track section on page 1 to reopen the child's *existing* track.
Remember to search for the child by their new WMS case number instead of their CIN.

Resources

Getting to Know the CONNECTIONS Activities Window Build Job Aid <http://www.ocfs.state.ny.us/connect/jobaides/jobaides.asp>

CONNECTIONS Regional Implementation staff <http://ocfs.state.nyenet/connect/contact.asp>

CONNECTIONS App-Help mailbox ocfs.sm.conn_app@ocfs.state.ny.us

(NOTE: address contains an underscore)

A Helpdesk ticket is now required before sending requests to the Triage Unit. This can be acquired by emailing FixIt@its.ny.gov.

ITS Enterprise Service Desk
1-844-891-1786