

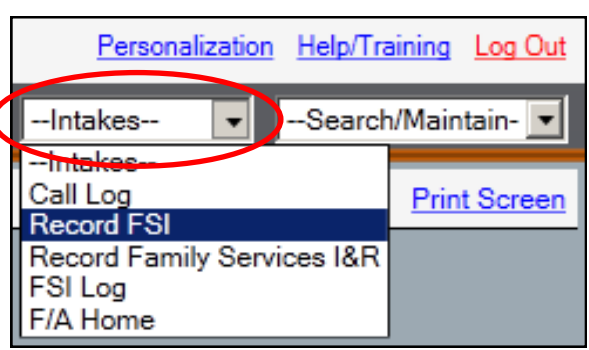
A Family Service Intake (FSI) stage can be created in one of four ways: (1) from within an open CPS investigation (INV) stage, (2) upon the approval of a CPS INV stage closure with the reason, "Case open - CPS required", (3) upon the approval of a FAR stage closure with the reason, "Closed; assistance provided, preventive case opened" or (4) from the Intakes menu on the main CONNECTIONS page by workers assigned the CREATE FSI business function.

When created from a CPS INV or FAR stage, the FSI is automatically opened under the same Case Number as the stage from which it originated. When created from the Intakes menu, however, it will be given a new Case Number unless the worker wishes to link the FSI to an existing case that contains other open stages for the family.

For workers that open FSI stages, this tip sheet describes the process for linking an FSI stage to an existing Case number for the family .


### Creating an FSI from the intakes Menu

When a Family Service Intake (FSI) is created by using the Record FSI option in the Intakes menu in the upper right corner of the main CONNECTIONS window - such as when a family applies for Preventive Services - a new Case Number and new Stage Number are system created for that FSI.



Unlike an FSI created from within a CPS INV stage, no information pre-fills when an FSI is created by this path.

The Intake Source and Person List information must be manually entered.

 **To avoid unnecessarily starting an FSI**, be sure to do a thorough search of all persons listed on the Services Application *BEFORE* you click the **Record FSI link** to be sure they are not already part of an open FSI or FSS stage.

**Reminder:** When populating the Person List, it is essential that a thorough search be done on *each* person being added to the FSI to avoid creating duplicate identities in CONNECTIONS. Having just one Person ID (PID) per person insures that the person's whole child welfare history is kept together - important both for making good safety decisions and for accessing past stages through the Implied Role path.

*For additional information on completing an FSI, please see the **Getting to Know the Transformed Family Services Intake Stage in CONNECTIONS** Job Aid.*

When a match is found in the database, the newly created FSI PID should be **related** to the existing PID in the database. The **New** button should be used only if a match for the person does not already exist in CONNECTIONS.



If a family has had prior involvement with the child welfare system, the new FSI should be **linked** to a previous case number so that all case history is preserved and can be more easily located. An FSI can be linked to either an open or a closed case.

## Linking an FSI

In order to link an FSI stage with an existing case, three conditions must be met:

- ▶ The FSI must originate from the Intakes menu.
- ▶ There must be at least one person over the age of 18 in common.
- ▶ There can not be another open FSI or Family Services Stage (FSS) under that Case Number in the same district.

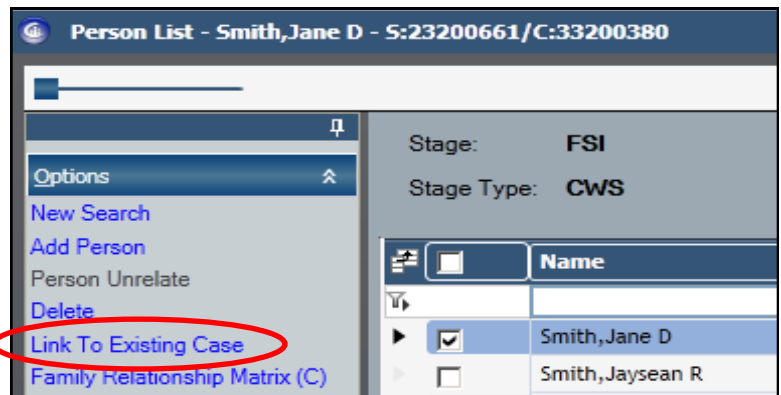
### Step-by-Step: Linking an FSI to Another Case

1. Select the FSI stage on your workload.
2. Click the **Person List** link in the left navigation pane.

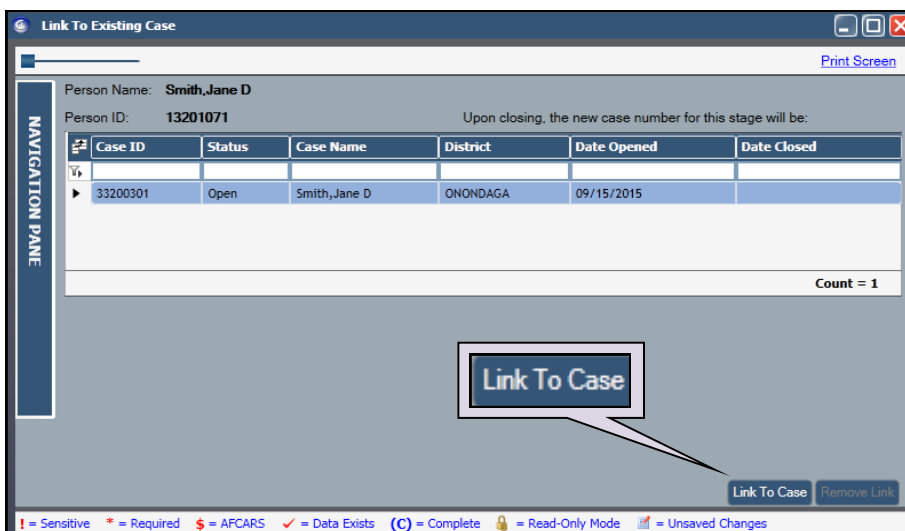
3. Select an adult from the Person List.

4. Click the **Link to Existing Case** link in the left navigation pane.

*The Link to Existing Case window displays.*



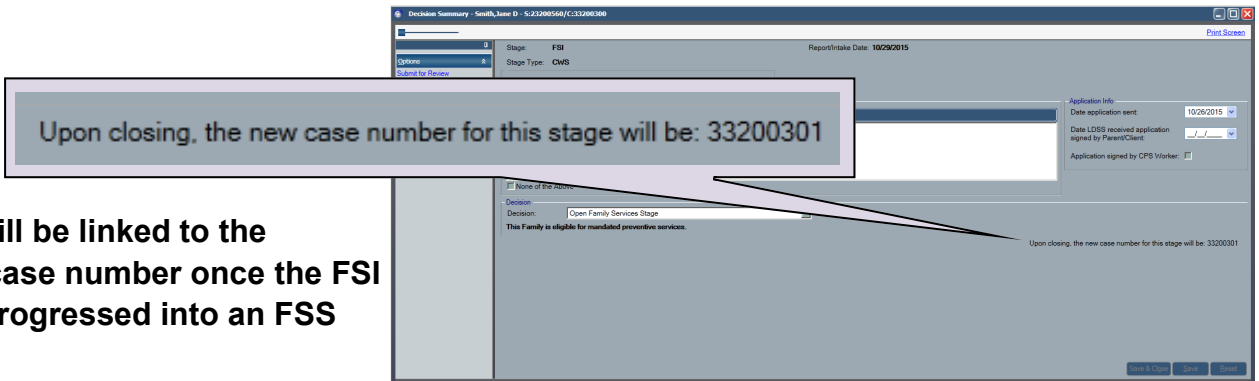
5. From the grid, select the case to which you wish to link the FSI.



6. Click the **Link to Case** button.

7. Click **Yes** to the resulting pop-up message asking if you wish to continue.

On the Decision Summary window, the newly linked case number will appear in the note



The FSI will be linked to the selected case number once the FSI is stage-progressed into an FSS stage.



For information on how to create an FSI from within a CPS INV stage, see the CONNECTIONS Tip Sheet, *Creating a Family Services Intake (FSI) from a CPS Investigation*.

## Resources

- CONNECTIONS Job Aids and Tip Sheets:  
<http://ocfs.state.nyenet/connect/jobaided/jobaided.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)

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

ITS Enterprise Service Desk  
1-844-891-1786