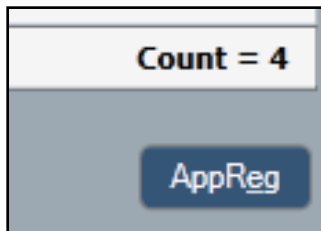




The Welfare Management System (WMS) is the system used to record, maintain, and process information on persons who apply for or are eligible for Social Services benefits or services in New York State. WMS Services support the delivery of Child Welfare Services (Foster Care, Child Protective, Preventive, Adoption and Kinship-Guardianship), Domestic Violence Services, Child Care Services, and Adult Protective/Preventive Services. The CONNECTIONS system interfaces with WMS to share certain information. This tip sheet addresses commonly asked questions from services and eligibility workers about how the two systems interact.

The WMS Application Registration (“App Reg”) Process

The opening of certain types of Family Services Stages (FSS) in CONNECTIONS requires the opening of a companion WMS case to authorize needed services. In WMS, this initiates with the Application Registration or “App Reg” process.



Application Registration is begun in CONNECTIONS by clicking the WMS **AppReg** button on the **Person List** window of the FSS.

Note: The WMS AppReg button enables only for certain types of FSS stages:

Button enables for:	Button does not enable for:
Child Welfare Services (CWS)	Court Ordered Investigation (COI)
Child Case Record (CCR)	Out of Town Inquiry (OTI)
Advocate Preventive (ADVPO) (NYC only)	Interstate Compact for the Placement of Children (ICPC)

The WMS AppReg button will enable when **all** of the following conditions are met:

- ✓ The worker is a local district worker assigned the MAINT APP REG business function.

The button does not display for Voluntary Agency workers or for LDSS workers who do not have the business function.
- ✓ The following demographic fields are populated for all individuals:
 - First Name
 - Last Name
 - Middle Initial
 - Date of Birth
 - Sex
- ✓ Either a Primary Caretaker is identified or the “No Primary Caretaker Exists” checkbox is selected on the **Primary/Secondary Caretaker** window (accessed from the Person List). This is not required for FSS/CCR stages.
- ✓ An active Primary Address exists in CONNECTIONS for the Primary Caretaker.

If the stage type is FSS-CCR or if the “No Primary Caretaker Exists” checkbox is selected, the address used for the Case

Address defaults to the primary address of the first individual listed in the CONNECTIONS Person List.

WMS Timeframes

- **Services cases in WMS must be fully opened within 90 days.**

Applications that have not been processed within 90 days of the last transaction date (the date the application was created or last updated) are at risk of being system withdrawn. Once withdrawn, the application is no longer available for further processing.



If an application is system withdrawn, the existing FSS stage must be closed. A new FSI must be created and stage progressed into a new FSS. The App/Reg button in the new FSS is then used to initiate a new application in WMS.

- **A WMS case opening cannot be processed if an application date is more than 180 days in the past.**

To help districts avoid potential problems, there is a monthly WMS report (WINR4111) available in the BICS print queue that lists:

- ✓ All pending applications 30 or more days old
- ✓ All pending applications registered for more than 7 days
- ✓ Applications and pending records to be systematically deleted
- ✓ Applications and pending records that have been systematically deleted

Case Initiation Date (CID)

The Case Initiation Date (CID) for an FSS is based upon the earliest of five possible trigger dates:

- Date of Application
- Date of Placement
- Date of Indication
- Corrected Application Date
- Date of Court Order

During the App Reg process, the earliest of these CID trigger dates is sent from CONNECTIONS to WMS as the Application Date.

An Application Date may be corrected on the **FASP** window of the FSS if the original Application date was entered incorrectly in the FSI.

Corrected Application Date:

Date of Placement:

A Corrected Application Date will change the CID only if

- The corrected date is *earlier* than the existing CID
- The Initial FASP has not yet been approved or the Comprehensive FASP has not yet been launched



If the CID is modified after Full Data Entry (FDE) has begun or the WMS case has been opened, the modified CID will display in CONNECTIONS but will not update the application date in WMS. If FDE has begun, but the case has not batched in WMS, the transaction can be cancelled, resetting the transaction back to an application status. The Correct Application Date can then be entered which will change the WMS application date.

“Examine Blinking Fields” Error Message

An “Examine Blinking Fields” error message may display when the App Reg button is pushed in CONNECTIONS. The most common causes of this error are:

- An invalid SSN - refer to GIS # 16-005
- More than one individual with the same SSN
- More than one individual with the same CIN
- A missing or invalid address.

WMS will not accept invalid characters in the address field, including addresses outside the country.

- A CIN listed in the CONNECTIONS Person Identifiers tab has been consolidated or suppressed in WMS - refer to GIS # 14-004.

The CONNECTIONS - WMS App Reg Interface

Demographic information in WMS and CONNECTIONS is kept in sync through an interface (regular communication) between the two systems.

- Once the App-Reg button is pushed in CONNECTIONS, the remaining activities to open the WMS case must be completed in the WMS system. These activities include:
 - ✓ Assigning a Client Identification Number (CIN) for each person listed in the Person List in CONNECTIONS
 - ✓ Assigning a WMS Case Number
 - ✓ Authorizing Direct Services and Purchase of Services (POS)

- In CONNECTIONS, WMS Registry and Version numbers will remain on the FSS header until WMS case opening and overnight batch processing are completed.

App Reg/Ver : 260229/01

- The WMS case number will replace the App Reg version number when the WMS case is fully opened and batched.

WMS Case # : S127624

- If the FSS is closed in CONNECTIONS prior to the WMS case opening, the WMS application will be system withdrawn.

- The name of the first person entered in a CONNECTIONS intake stage (either CPS INT or FSI) is sent to WMS as the Line 01 person.

Once entered in CONNECTIONS, the line number of a person cannot be changed in WMS.

Case Name:	Adams,Maggie
Stage:	FSS
<input type="checkbox"/>	Name
<input type="checkbox"/>	Adams,Maggie
<input type="checkbox"/>	Adams,Quincy
<input type="checkbox"/>	Adams,Evelyn
<input type="checkbox"/>	Adams,Jamal

Note: The order of the stage members on the Person List in CONNECTIONS does not necessarily reflect the line order in WMS.


- The name and the address of the person designated as the Primary Caretaker in CONNECTIONS becomes the WMS application case name and address.

If the “No Caretaker Exists” box is checked, the name and address of the first individual in the CONNECTIONS Person List defaults to the WMS application name and address.
- Each WMS case must have *at least* one person listed as the Applicant/Payee (“App/Payee”). WMS staff designates the App/Payee when completing WMS case opening Full Data Entry.

- The App/Payee can be assigned to any line number in WMS.
- You cannot end-date a person in CONNECTIONS who is the App/Payee without first designating another App/Payee in WMS and allowing the WMS case to batch overnight.

Ongoing Demographic Maintenance

- Certain demographic information cannot be updated directly in WMS. It must be entered or updated in CONNECTIONS and sent to WMS via the WMS/CONNECTIONS interface:
 - ✓ First Name, Middle Initial, Last Name, and Suffix
 - ✓ Date of Birth
 - ✓ Sex
 - ✓ Address and Case Name at point of App/Reg.
 - ✓ Office/Unit/Worker number for the Case Manager
- A CIN, once validated by WMS, cannot be updated in CONNECTIONS. Any CIN maintenance must be done in WMS.

 **Reminder:** Any workers with an assigned role in the stage or with access to another worker's workload can modify information in WMS through CONNECTIONS.



Use caution when merging PIDs in CONNECTIONS as incorrect person merges can affect WMS data.

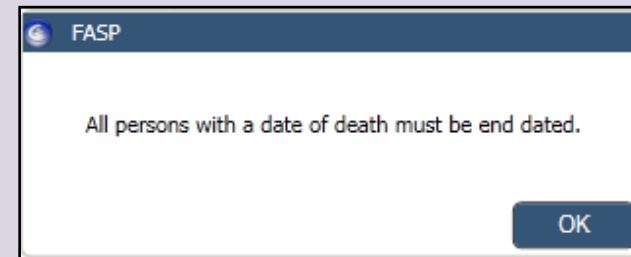
PIDs should not be merged while WMS is in App/Reg status. The WMS case number must display, indicating that Full Data Entry (FDE) has been completed, before merging PIDs.

Unlike CONNECTIONS, where PIDs can be merged and split, WMS information, once combined, is difficult and sometimes impossible to delink.

Death of an App/Payee

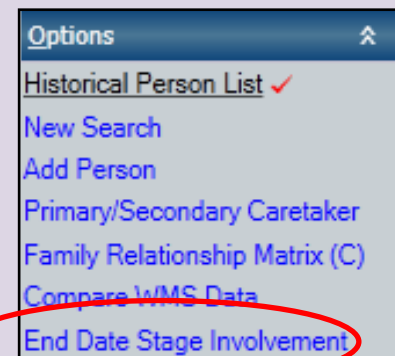
If the person named as App/Payee dies (or otherwise leaves the household), another App/Payee must be designated in WMS and the overnight batch processed before the deceased person can be end-dated in CONNECTIONS.

CONNECTIONS will not allow the launch of a FASP if a DOD (Date of Death) has been entered for any person in the Person List; the person must be end-dated.



Step-by-Step:

1. Contact your district's WMS staff to designate a new App/Payee
2. Wait for the overnight batch
3. Verify that all progress notes involving the person are completed
4. Highlight the person on the Person List
5. Enter a DOD and Reason
6. Click the **End Date Stage Involvement** link in the navigation pane
7. Select a Reason
8. Click the **Save** or **Save & Close** button



- A WMS Services case cannot be closed while its companion CONNECTIONS case is still open.

When a WMS case is linked to an open FSS stage in CONNECTIONS, the CONNECTIONS Indicator will be 'Z' in WMS. Once the CONNECTIONS stage closes, the CONNECTIONS Indicator changes to a 'Y' in WMS.

- When the CONNECTIONS case is closed, the corresponding WMS case must also be closed.

CONNECTIONS Child Case Record (CCR) and WMS

CONNECTIONS automatically creates a Child Case Record (CCR) when the Case Manager of the FSS/CWS stage clicks the Completely Freed for Adoption checkbox on the **Placement Information** tab of the **Tracked Child** window.

Name of Discharge Resource:

Completely Freed for Adoption: (Creates Child Case Record)

This process end-dates the child from the FSS/CWS and sends a deletion transaction to WMS to remove the child from the WMS case. The child must be manually deleted from the WMS case.

If no other family members will continue to receive services, the existing CONNECTIONS FSS and companion WMS case should be closed.

- The child's demographic information is carried forward to the CCR from the FSS/CWS stage
- The child's CIN remains unchanged
- The date the CCR was created will become the application date for the new child only WMS application and case
- The creation of the CCR stage requires a new Application Registration in WMS. Clicking the **AppReg** button on the **Person List** of the CCR initiates this process. The balance of

activities required to open a child only case must be completed in WMS.

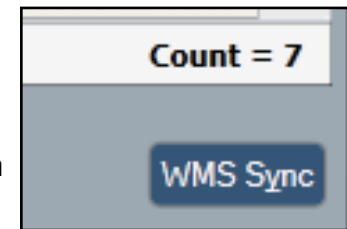
The **WMS Sync** button will display for both local district and voluntary agency workers when there is a difference in current values between the shared fields in WMS and CONNECTIONS.



For additional information on creating a Child Case Record, see the CONNECTIONS Tip Sheet, *Creating a Child Case Record for a Legally Freed Child*.

The WMS Sync Button

The WMS Sync Button displays at the same location on the **Person List** window as the AppReg button. It enables when:

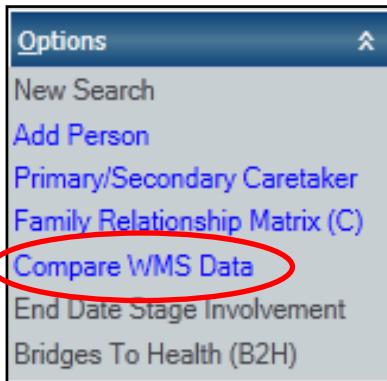


- A Voluntary Agency worker adds an individual to or end dates an individual from the stage.
- An LDSS worker adds an individual to a stage by relating to an existing PID and additional demographic information is needed.
- A worker makes a demographic change to any stage other than the FSS (e.g.: CPS INV) where there are individuals in common.
- The role of Case Manager is reassigned.
- A Caretaker is changed when WMS is in App/Reg status.
- A change is attempted while the WMS application is in Pending or error status.
- A change is made in WMS to a related Non-Services case (e.g., Temporary Assistance, Medicaid, Supplemental Nutrition Assistance Program, HEAP) that has individuals in common with the CONNECTIONS FSS.

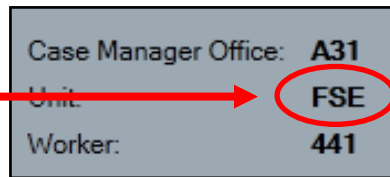
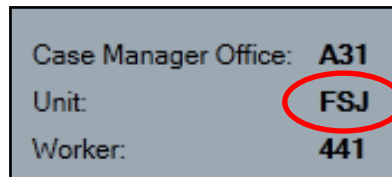
Note: Person demographics will not change in a WMS Services case if it does not agree with information in an active WMS Non-Services case (TA, MA, SNAP or HEAP). If there are both active Non-Services and Services cases associated with a CIN, data can be modified in CONNECTIONS but it will not be in sync with WMS and the WMS Sync button will remain enabled until differences are reconciled.

To reconcile the differences, the caseworker should contact the WMS Non-Services worker to determine which data is correct. The Non-Services worker can then make the change in the WMS Non-Services case, or the caseworker can reverse the change in CONNECTIONS.

The **Compare WMS Data** window, accessed from a navigation pane link on the **Person List** window, allows worker to compare the data in WMS with the data in CONNECTIONS to identify where the two systems differ.



This link is only available when the WMS Sync button is enabled.



“Sync on Save”

Some changes in CONNECTIONS will “sync on save” – meaning the synchronization process is automatically initiated when the **Save** button is clicked. For example, the WMS Sync button does not enable when:

- Changes are made to demographic information on the FSS Person List window by either a Voluntary Agency or LDSS worker.
- An LDSS worker adds an individual to a stage by relating the person to an existing PID and no additional demographic information is needed.

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.gov

(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.

ITS Enterprise Service Desk
1-844-891-1786