Uploading Photos and Documents in CONNECTIONS

Job Aid

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PROFESSIONAL DEVELOPMENT PROGRAM
ROCKEFELLER COLLEGE UNIVERSITY AT ALBANY State University of New York

Uploading Photos and Documents in CONNECTIONS Job Aid

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Module 1:
Introduction to the Uploads Function in CONNECTIONS

Purpose of this Job Aid

This Job Aid is intended for workers who are assigned to Investigation (INV), Family Assessment Response (FAR), Foster and Adoptive Home Development (FAD), Family Services Intake (FSI), and/or Family Services (FSS) stages in CONNECTIONS.

The following topics will be presented using narratives, screen images, and step-by-step instructions:

- Requirements and Considerations for Uploading
- The Uploads Web Page
- The My Uploads Tab
- Working with Uploaded Photos and Documents

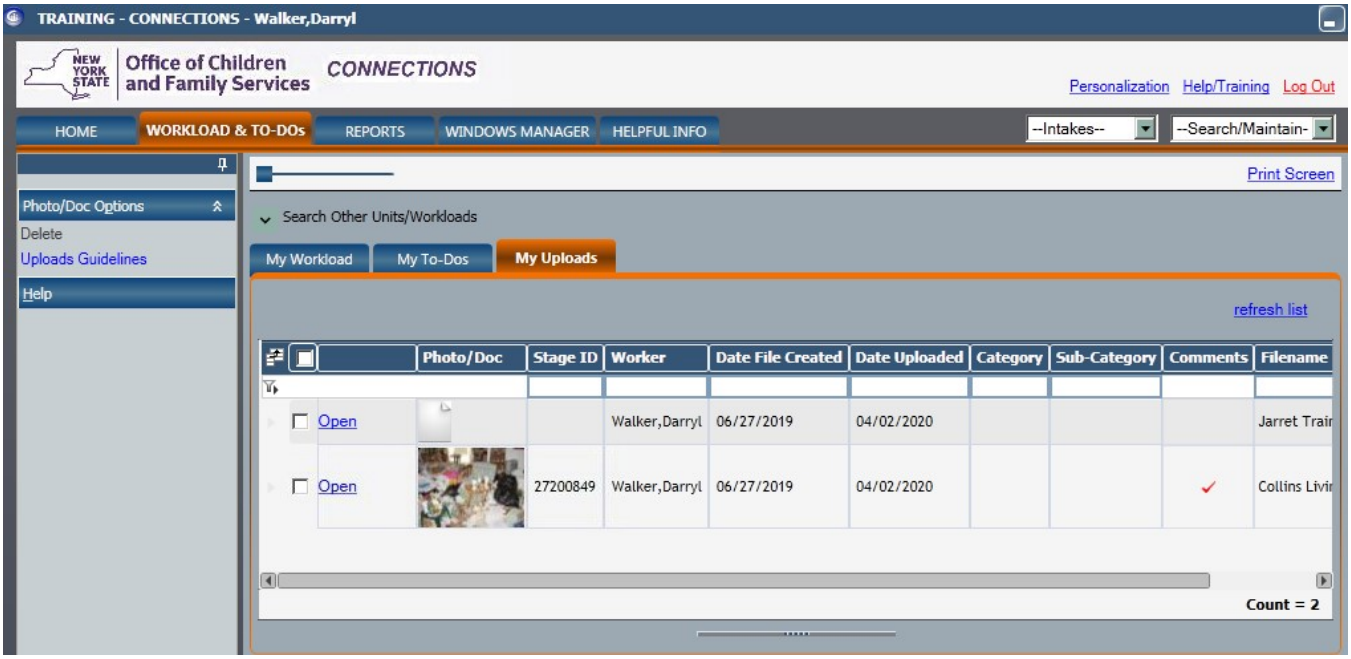
This job aid assumes familiarity with the *Progress Notes*, *Person List*, *Allegations*, and *Health Services* windows in CONNECTIONS.

Any visible identifying data in this document is fictitious and used for training purposes only. Window layout and content (e.g., field names) in CONNECTIONS Production upon implementation may differ from the images in this document.

The Uploads Function

Many districts and agencies in New York State maintain their own secure network databases for purposes of storing digital photographs, scanned documents, vital records documents, or other records and information pertinent to the provision of services. Most districts and agencies also maintain extensive paper files. These databases and paper files are internal to each district/agency and are not always easily shared with others who may require them.

With the Uploads function, workers use a secure web application to transfer photos and documents to the **My Uploads** tab on the main CONNECTIONS window. Once in CONNECTIONS, files can be linked to a stage, progress note, Person ID, allegation, or health record, fully integrating them into the system. This process allows for increased sharing and storage of case-related information.



Module 2:
Requirements and Considerations for Uploading

Business Function Requirement

CONNECTIONS users with the FILE UPLOAD Business Function have access to the secure web application known as the Uploads web page. Those with access can use this web page to upload photos and documents to their CONNECTIONS **My Uploads** tab with or without specifying a stage assignment.

Workers who do not have the FILE UPLOAD Business Function will receive the following message upon attempting to access the web page:

> "*Your CONNECTIONS user account does not have access to this file upload feature.*"

The FILE UPLOAD Business Function, like others, can be assigned by your agency's CONNECTIONS Security Coordinator (or anyone with the MAINT SECURITY Business Function).

File Requirements

Using the web page, you can select up to 10 files for each upload. Keep the following guidelines in mind:

- Maximum file size is 95MB (megabytes) per file.
- Files cannot be password protected. If you attempt to upload a password-protected file, you will receive a message alerting you to unprotect the file and try again.
- File names cannot be longer than 200 characters.

Refer to district protocol when naming files. Once the file is uploaded, the file name cannot be modified.

Permitted File Types

Documents	Photos
Microsoft Word	Joint Photographic Experts Group
Portable Document Format	Bitmap
Microsoft Excel	Portable Network Graphics
Text	Tagged Image File Format
Rich Text Format	

Note: All **documents** will be converted to PDF during the upload process; photos will *not* be converted.

Considerations for Uploading

Choose files carefully.

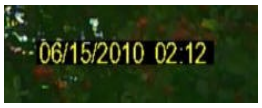
Exercise discretion when determining what files to upload. For example, it is not necessary to upload several files that show practically identical images. Instead, upload the image or document that best represents the information you are attempting to convey.

Remove files from local devices.

Once a file has been uploaded to CONNECTIONS, it should be removed as soon as possible from the **agency-issued** local device on which it was stored (e.g., camera, cell phone, computer).

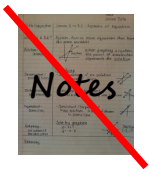
Use a date/time stamp.

Whenever possible, all photographs should be time stamped and include the date and location of the image. Many cameras can automatically date/time stamp a photo.



Do not substitute hand-written notes.

Hand-written notes are not an acceptable substitute for progress notes recorded in CONNECTIONS. It is appropriate to upload hand-written letters or documents related to the case; however, these should always be associated with a progress note that provides context to the file.



Did You Know?

Local Commissioners Memorandum 17-OCFS-LCM-14

Each district utilizing mobile devices shall develop and implement a mobile device policy, which must:

(1) provide a comprehensive overview of the acceptable uses of a mobile device;

(2) define what resources are permitted to be accessed from mobile devices (e.g., email);

(3) specify what types of mobile devices can be utilized (e.g., iPhone, iPad);

(4) outline the degree of access that various classes of mobile devices may have; and

(5) specify how provisioning will be handled. Each district shall make the mobile device policy available to OTDA and OCFS upon request.

Module 3:
The Uploads Web Page

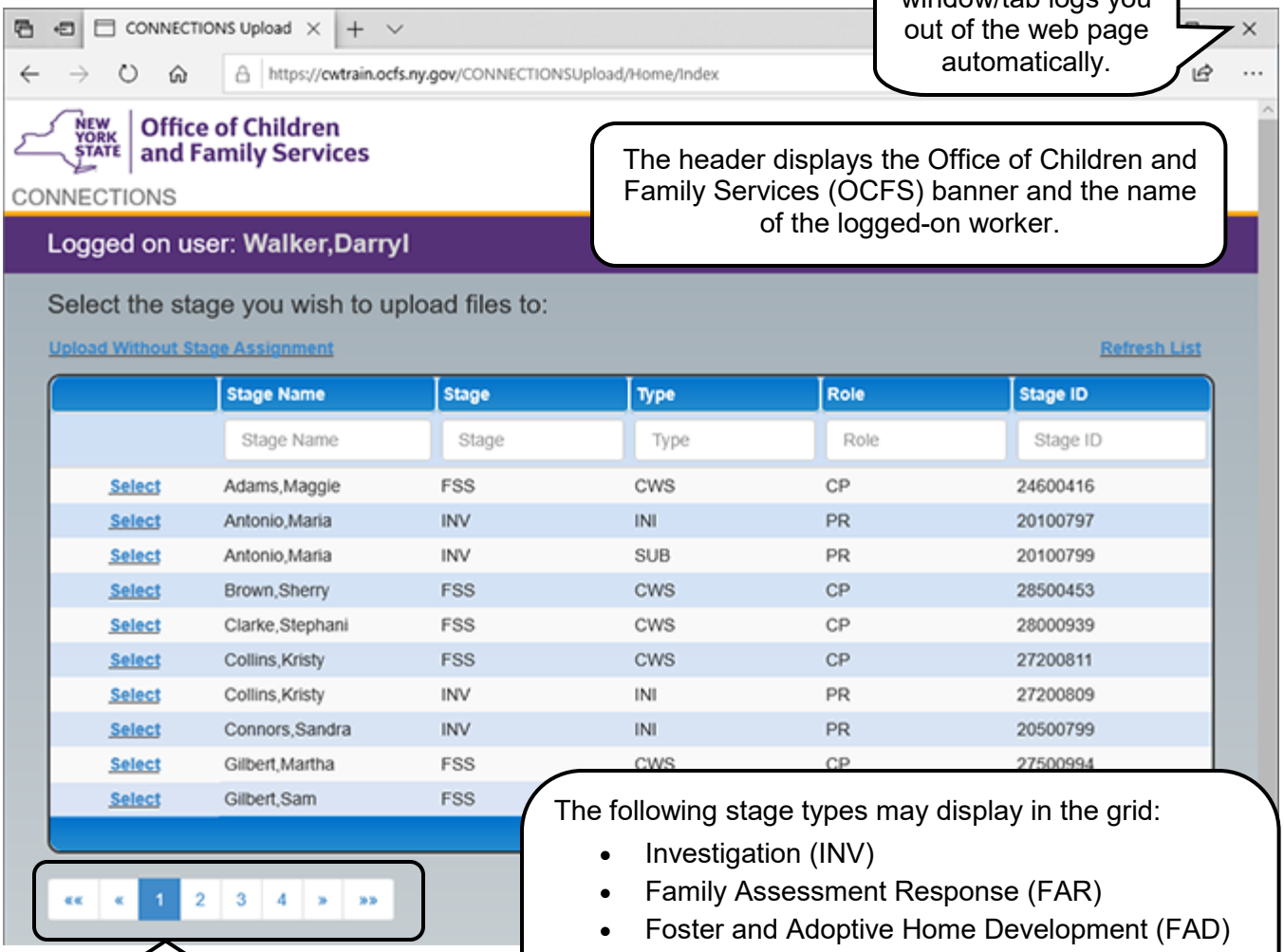
Photos and documents are uploaded to CONNECTIONS via the Uploads web page, which is located at the following Uniform Resource Locator— or URL:

https://cw.ocfs.ny.gov/connectionsupload

You can access the URL from any device on the Services (SVC) domain, as well as computers, tablets, and smart phones with Internet access; you do not need to be on the state network in order to access the URL.

Exploring the Home Page

After successfully logging in, the home page displays.



Closing the browser window/tab logs you out of the web page automatically.

The header displays the Office of Children and Family Services (OCFS) banner and the name of the logged-on worker.

The following stage types may display in the grid:

- Investigation (INV)
- Family Assessment Response (FAR)
- Foster and Adoptive Home Development (FAD)
- Family Services Intake (FSI)
- Family Services Stage (FSS)

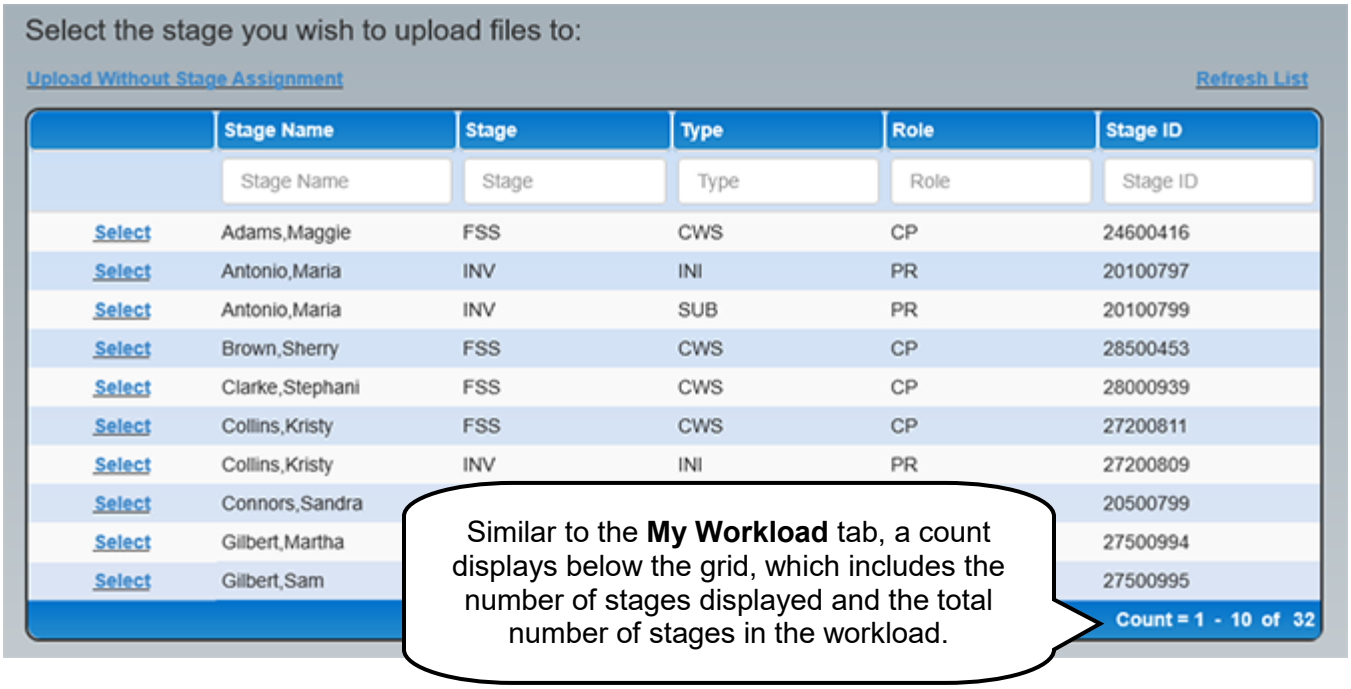
You cannot upload to Intake (INT) and Administrative Review Investigation (ARI) stages.

The footer contains a page counter and buttons to navigate between the lists.

The grid displays your assigned stages in the same order as they appear in CONNECTIONS. It contains the following columns:

- Stage Name
- Stage
- Type
- Role
- Stage ID

You can filter and sort the grid using any of the column headers. Clicking the **Refresh List** link above the grid will refresh the grid to the default order.



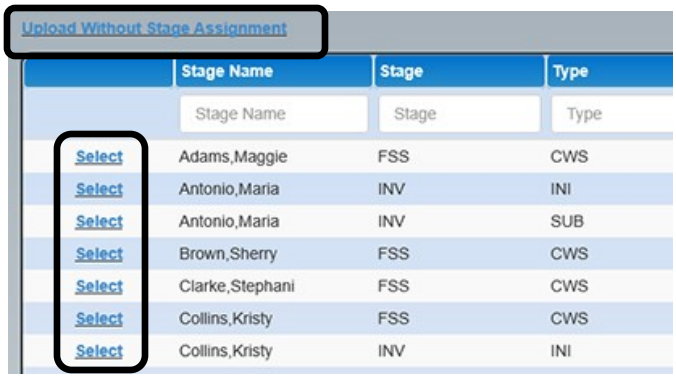
Did You Know?

- You can have multiple sessions of the Uploads page open at the same time. For example, you can have the page open on a computer, phone, and tablet simultaneously.
- The Uploads web page will time out after 20 minutes of inactivity.
- You do not need to be on the state network to access the Uploads web page; however, remember to only use your agency-issued devices.

Uploading Photos and Documents

You have two options when uploading files to CONNECTIONS:

- Upload with a stage assignment by clicking the **Select** button next to the stage with which the files are to be directly associated.
- Upload without a stage assignment by clicking the **Upload Without Stage Assignment** link.



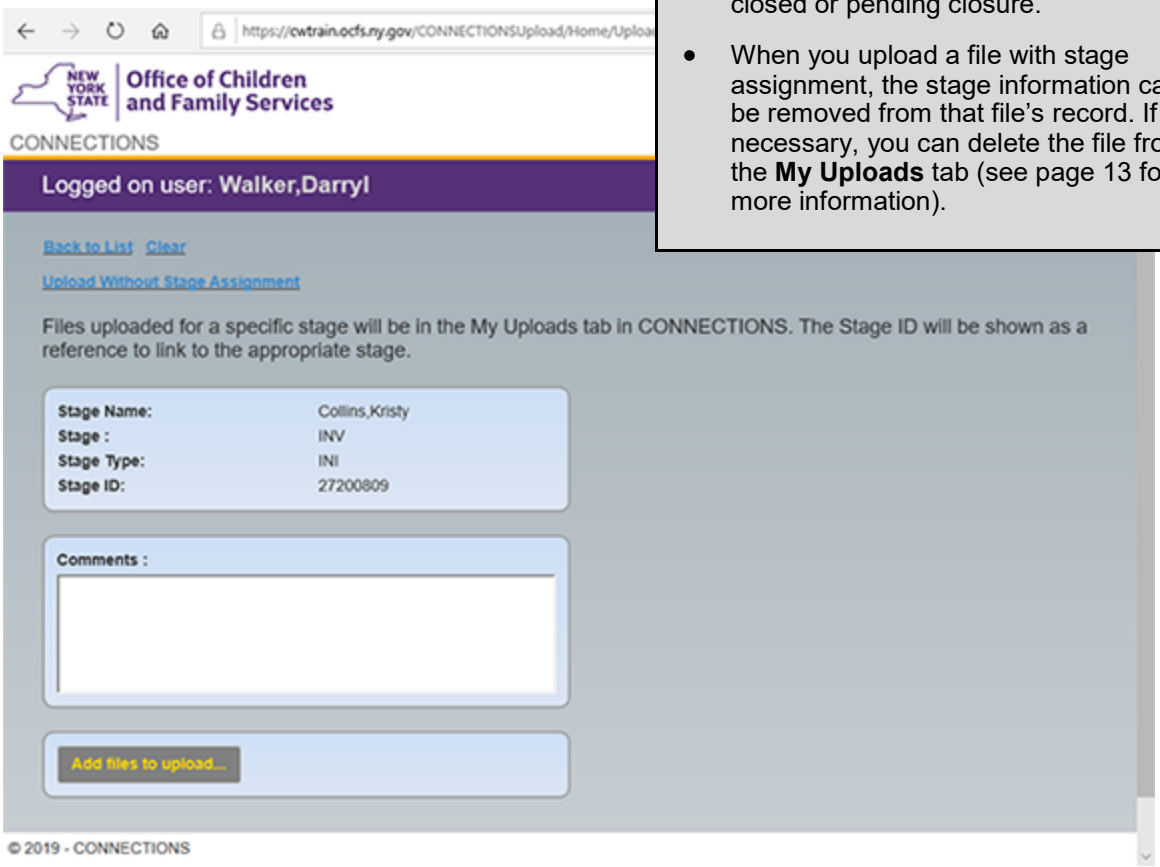
Uploading with Stage Assignment

You are encouraged to upload files with a stage assignment whenever possible. When you do so, certain information (i.e., stage name, stage, stage type, and stage ID) will prefill the **My Uploads** tab in CONNECTIONS.

When you click the **Select** link for a stage in the grid, a web page (see image below) will display where you can upload photos and documents for that stage.

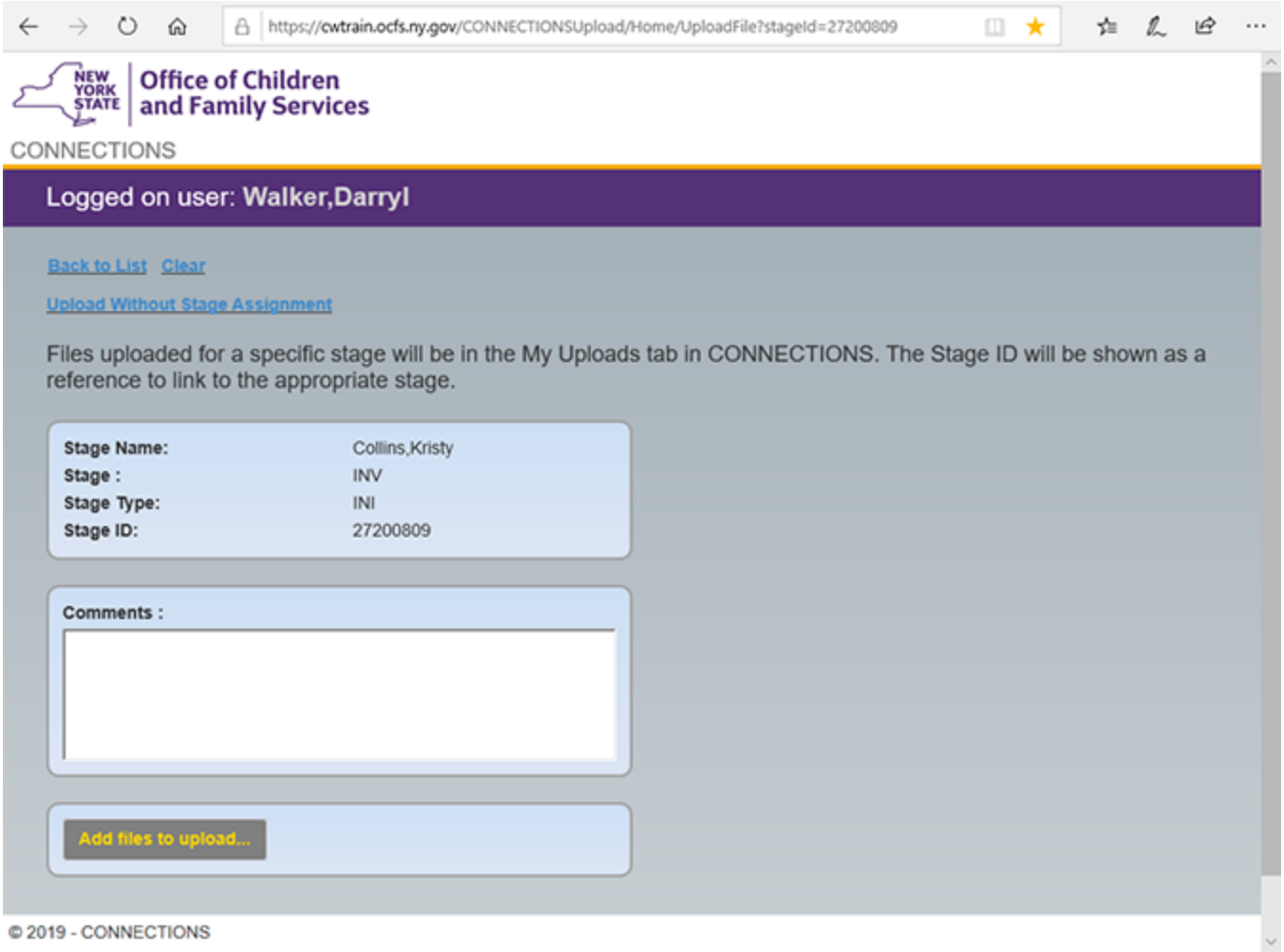
Did You Know?

- Uploading with stage assignment ***will not*** create the link required to fully integrate the file into CONNECTIONS. Linking is completed on the *Add Photos/Docs* window (see Module 5: Working with Uploaded Photos and Documents).
- You can only upload to stages in which you are currently assigned a role.
- You cannot upload to stages that are closed or pending closure.
- When you upload a file with stage assignment, the stage information cannot be removed from that file's record. If necessary, you can delete the file from the **My Uploads** tab (see page 13 for more information).



The web page for uploading with stage assignment contains the following components:

- **Back to List** links – Located at both the top and bottom of the window, clicking this link brings you back to the home page.
- **Clear** link – Deletes any comments you have recorded.
- **Upload Without Stage Assignment** link – Displays a window not prefilled with stage information.
- Stage information section – Displays the details for the selected stage.



- **Comments** field – For recording up to 4000 characters of descriptive information pertaining to the photo/document. **When uploading multiple files at once, any comments you record apply to all files; you cannot record separate comments for each individual file in a multiple upload.**
- **Add files to upload…** button – Displays a file selection window where you choose which file(s) to upload.

While comments are not required by CONNECTIONS, you should speak with your supervisor regarding your agency's protocols.

Step-by-Step: Uploading Photos/Documents with Stage Assignment

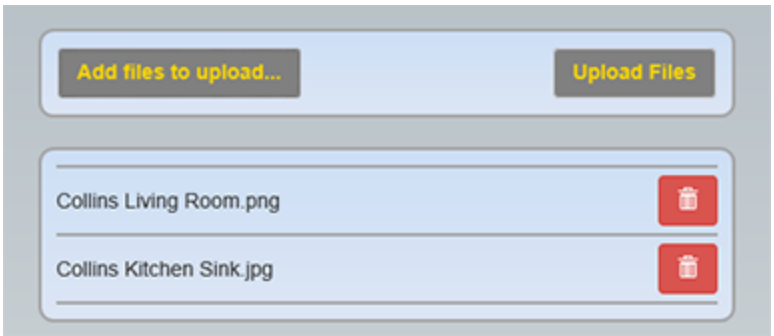
1 On the Uploads web page, click the **Select** link for the appropriate stage.
The uploading with stage assignment page displays.

2 Click the **Add files to upload…** button.
The file selection window displays.

3 Select the photo(s) and/or document(s) you wish to upload.

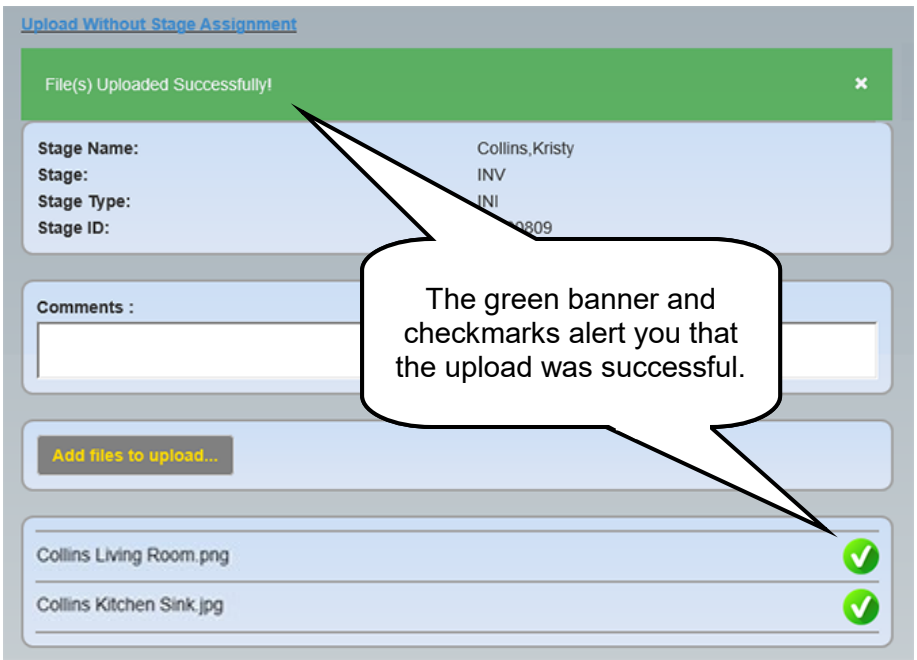
> **Did You Know?**
> You can select multiple files by holding the Control (**Ctrl**) key then selecting the files.

4 Click the **Open** button.
The uploading with stage assignment page displays with the file(s) listed. A delete button (denoted by a red trash can icon) displays next to each file name. Clicking this button will remove the file from the list.



5 In accordance with your agency's guidelines, record a description in the **Comments** field.
*The **Upload Files** button displays.*

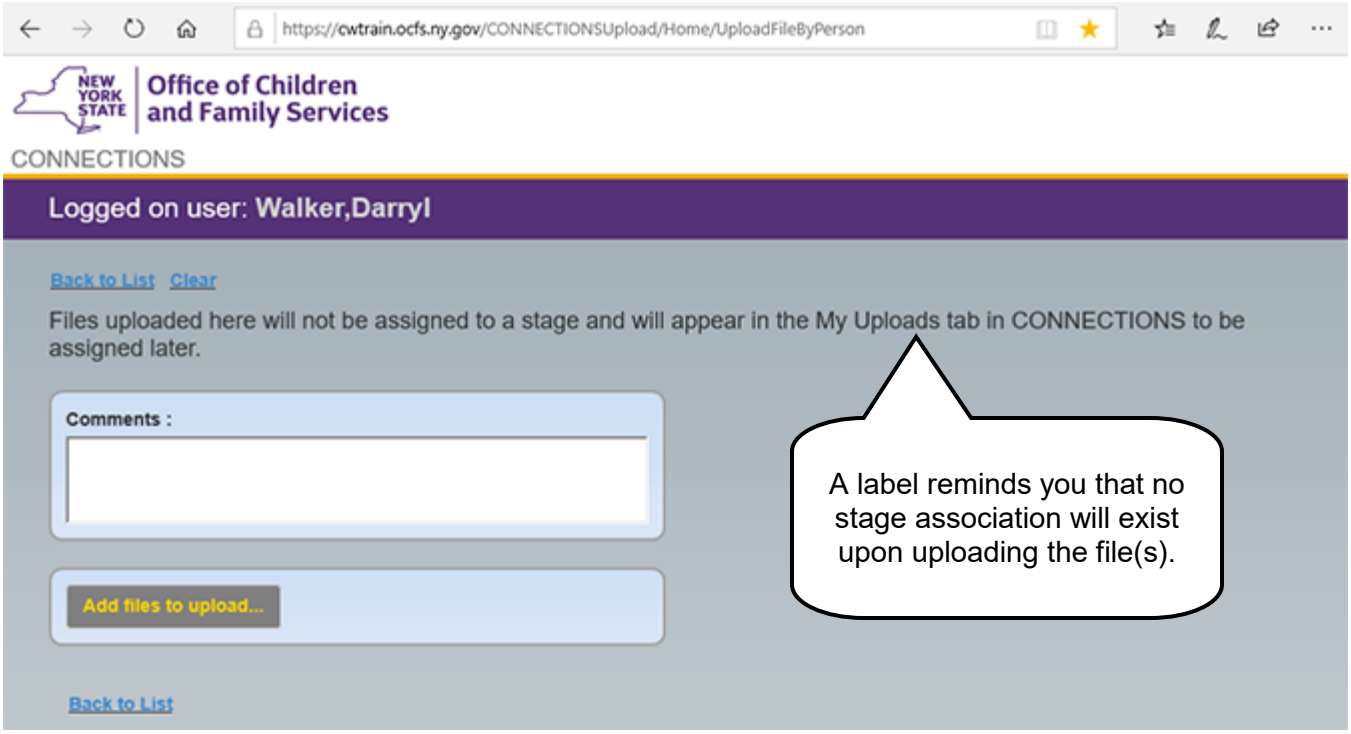
6 Click the **Upload Files** button.
"File(s) Uploaded Successfully!" displays at the top of the window and a green checkmark displays next to each uploaded file. If the files are not uploaded within the 20-minute time limit, an error message will instruct you to try again.



> **Did You Know?**
> Specific information is saved along with each file including:
> - File creation date
> - File upload date
> - Stage ID (if applicable)
> - Comments
> - File name

Uploading Without Stage Assignment

Clicking the **Upload Without Stage Assignment** link displays the web page to upload photos and documents without associating a stage. This web page looks and functions nearly the same as that for uploading with stage assignment (see page 8). The primary difference is the absence of the stage information section.



Step-by-Step: Uploading Photos/Documents Without Stage Assignment

1 On the Uploads web page, click the **Upload Without Stage Assignment** link. (You can also find this link on the web page for uploading with stage assignment.)
The uploading without stage assignment page displays.

2 Click the **Add files to upload…** button.
The file selection window displays.

3 Select the photo(s) and/or document(s) you wish to upload.

4 Click the **Open** button.
The uploading without stage assignment page displays with the file(s) listed. A delete button (denoted by a red trash can icon) displays next to each file name. Clicking this button will remove the file from the list.

5 In accordance with your agency's guidelines, record a description in the **Comments** field.
*The **Upload Files** button displays.*

6 Click the **Upload Files** button.
"File(s) Uploaded Successfully!" displays at the top of the window and a green checkmark displays next to each uploaded file. If the files are not uploaded within the 20-minute time limit, you will receive an error message instructing you to try again.

Remember, all document files are converted to PDF upon uploading.

Module 4:
The My Uploads Tab

Located on the main CONNECTIONS window, the **My Uploads** tab is a central location where you can manage uploaded photos and documents before they become part of the official case record. From this tab you can change the orientation of a photo, record or modify comments, and maintain category and sub-category selections for each file.

The My Uploads tab is not intended to store photos and documents indefinitely. Files are fully integrated into CONNECTIONS only after they are linked to a stage, progress note, Person ID, allegation, or health record, which is completed on the *Add Photos/Docs* window (see Module 5: Working with Uploaded Photos and Documents). Once a file is linked, it will no longer display on this tab.

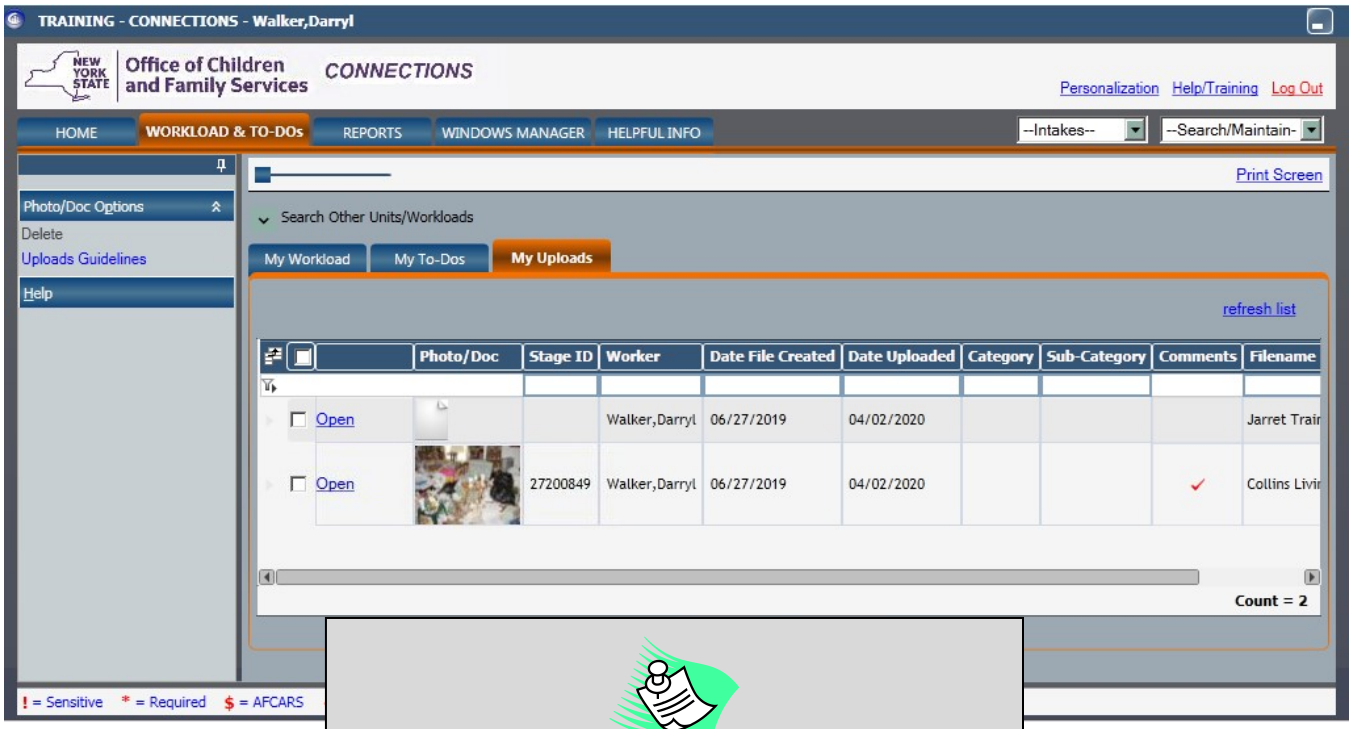
Did You Know?

Workers with implied role/cross district access cannot view photos and documents that are not fully integrated into CONNECTIONS.

Step-by-Step: Navigating to the My Uploads Tab

1 Log on to CONNECTIONS.
*The main CONNECTIONS window displays with the **WORKLOAD & TO-DOs** tab active.*

2 Click the **My Uploads** tab.
*The **My Uploads** tab displays.*

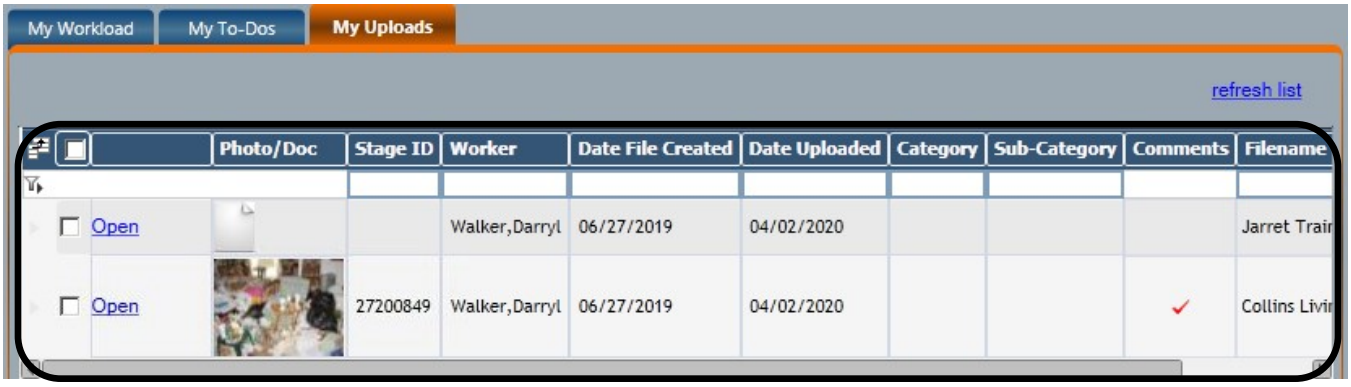


Since uploaded files display on a worker's **My Uploads** tab, anyone with access to a worker's workload can view and modify them.

Exploring the My Uploads Tab

Upon clicking the tab, a grid will display all uploaded files that have not yet been linked to a stage, progress note, Person ID, allegation, or health record. Clicking the **refresh list** link, above the grid, will return the grid to its default display with the most current data.

Remember, the **My Uploads** tab is not intended to store files long term; they should be linked shortly after uploading.



The photos/docs grid (shown in the image above) contains the following columns:

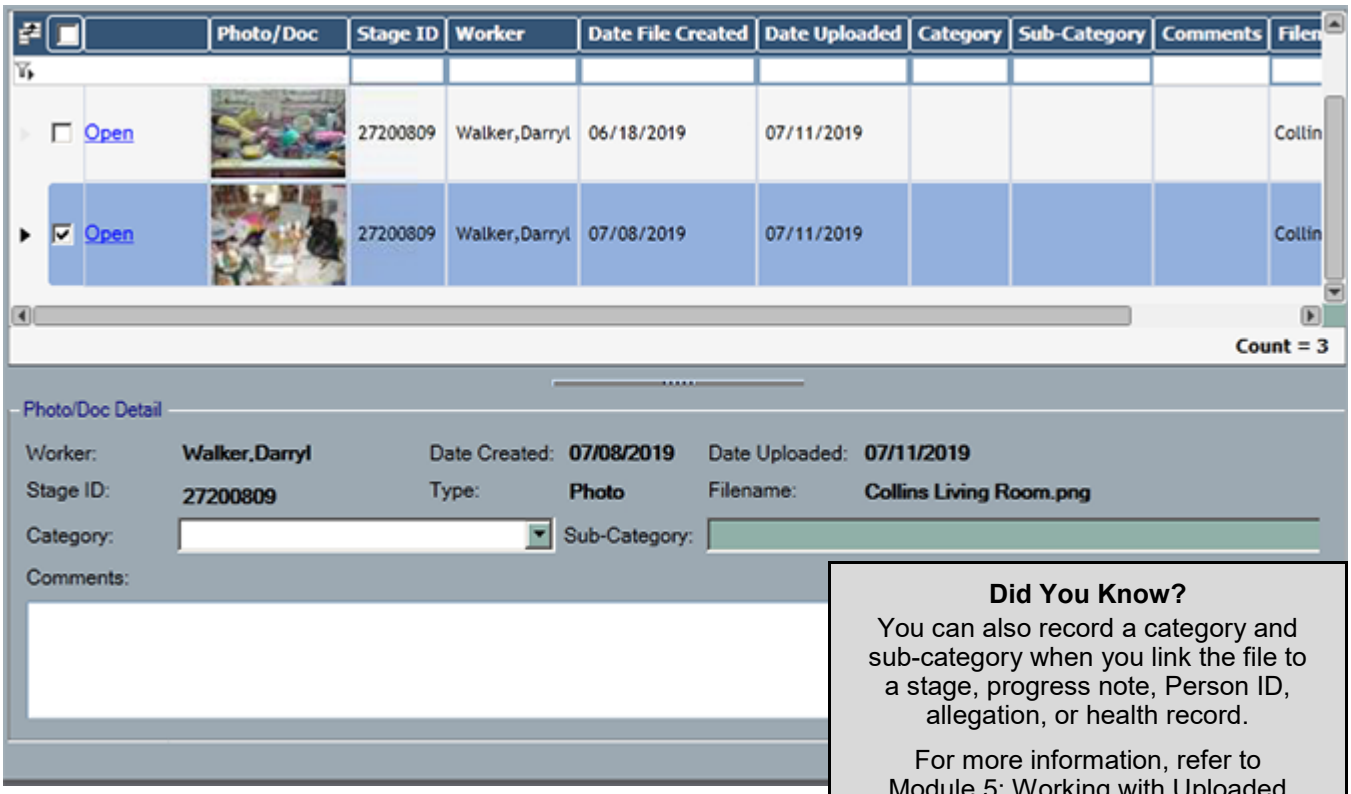
- Checkbox – Allows you to select multiple files at once.
- **Open** link – Opens the associated file in an *Edit Photo* window (for images) or in Acrobat Reader (for documents).
- **Photo/Doc** – Displays a preview of the image or an icon for documents.
- **Stage ID** – The Stage ID of the specified stage (if uploaded with stage assignment).
- **Worker** – The name of the logged-on worker.
- **Date File Created** – The date the file was created.
- **Date Uploaded** – The date the file was uploaded to CONNECTIONS. By default, files are listed in descending order based on this date (i.e., the most recently uploaded file is at the top of the grid).
- **Category** – Displays the category selected in the **Photo/Doc Detail** section of the tab, which displays upon selecting a file.
- **Sub-Category** – Displays the sub-category selected in the **Photo/Doc Detail** section of the tab.
- **Comments** – Displays a checkmark if comments have been recorded.
- **Filename** – The default name for the file upon uploading. It is not modifiable.

All columns in the grid may be filtered and sorted by with the exception of the multi-select, **Open** link, **Photo/Doc**, and **Comments** columns.

The Photo/Doc Detail Section

Clicking the grid row (*not* the **Open** link) for a photo/document displays the **Photo/Doc Detail** section with specific information about the photo/document. This includes worker name, dates created and uploaded, Stage ID (if uploaded with stage assignment), file type, and filename.

Any comments recorded at the time of uploading display in the **Comments** field and can be added to and/or modified. Comments should include descriptive information that provides clarity for other users that may access the file. Therefore, if none were recorded during uploading, you are strongly encouraged to record them here.



Did You Know?

You can also record a category and sub-category when you link the file to a stage, progress note, Person ID, allegation, or health record.

For more information, refer to Module 5: Working with Uploaded Photos and Documents.

Recording a Category and Sub-Category

You must record a category and sub-category in order to link a file. Categories and sub-categories provide a framework that ensures confidentiality rules are followed.

The selection you make in the **Category** drop-down field determines which sub-category options are available. Each category has associated sub-categories, as well as the option of “Other” if you are not able to determine an appropriate sub-category for a file. The primary categories are:

- Candidacy
- CARA
- Correspondence
- CPS
- Education
- Essential Documents
- FASP
- Foster/Adoptive
- Health
- Independent Living
- IV-E Documentation
- Legal
- Police
- Releases
- Safety/Risk Assessments
- Vouchers
- Other

The **Sub-Category** field enables once a selection is made in the **Category** field.

Category and Sub-Category Guidelines

Guidelines related to categories are available via the **Upload Guidelines** link. Clicking this link displays a read-only window that provides guidance on the use of specific **Category** and **Sub-Category** field options for particular files. Selecting the category and sub-category reasonable to the file ensures CONNECTIONS confidentiality rules are followed. Here are some examples:

- ☑ When linking files to a Person ID, the only categories that can be selected are “Essential Documents” and “Independent Living.” The Person ID crosses all stages the individual is listed in, which limits the type of information appropriate to link to it because many different types of child welfare workers will be able to access this information.

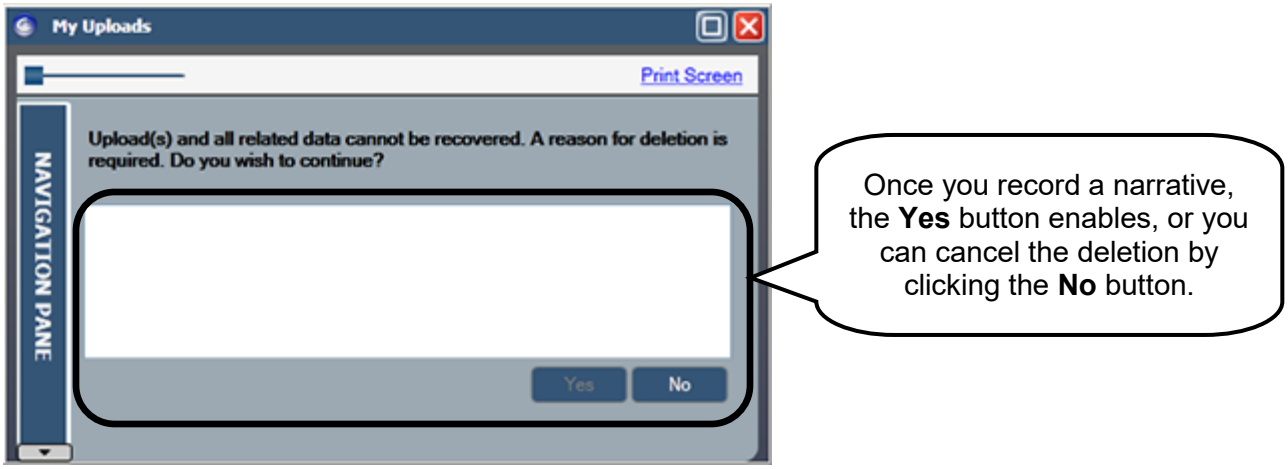
- ☑ Information that would directly identify the reporter, source, or collateral contact of a CPS Intake report should be given the category of “CPS” and the sub-category “Information from Source of Report” or “Info from Collateral” and linked to a progress note with “Reporter/Source” selected in the **Other Participants** field. This automatically limits the access of other users and individuals to that progress note and file, thereby maintaining confidentiality.

- ☑ Uploaded child health information in FSS stages must be given the category of “Health” and placed in the *Health Services* window. CONNECTIONS does not allow files with the category of “Health” to be placed in other locations within the FSS stage.

Deleting an Uploaded File

If you wish to delete uploaded photos and documents, you can use the **Delete** link in the **NAVIGATION PANE**, which enables when one or more files are selected in the grid. Upon clicking the **Delete** link, you will receive the following message with **Yes** and **No** buttons:

“Upload(s) and all related data cannot be recovered. A reason for deletion is required. Do you wish to continue?”



Upon deletion, a record is stored in CONNECTIONS containing the following information:

- the Employee ID (Person ID) of the worker performing the deletion
- the date of the deletion of the photo/doc
- the reason entered in the narrative text box
- the date created and the date uploaded of the photo being deleted
- the file description and any comments associated with the upload

The Open Link

To view a photo or document listed on the **My Uploads** tab, click the **Open** link that displays for it in the grid.

Documents open in an Acrobat Reader window, while photos display in an *Edit Photo* window (see below).

Editing the Orientation of a Photo

If a photo was uploaded in the wrong orientation (e.g., portrait instead of landscape), you can use the **Rotate Right** and **Rotate Left** buttons on the *Edit Photo* window to correct it, remembering to save your changes.

After making changes, the **Save & Close**, **Save**, and **Reset** buttons enable. If you do not make any edits, simply close the window by clicking the **X** button in the upper right-hand corner of the window.

Did You Know?

You can also edit a photo when linking it to a stage, progress note, Person ID, allegation, or health record.

For more information, refer to Module 5: Working with Uploaded Photos and Documents.

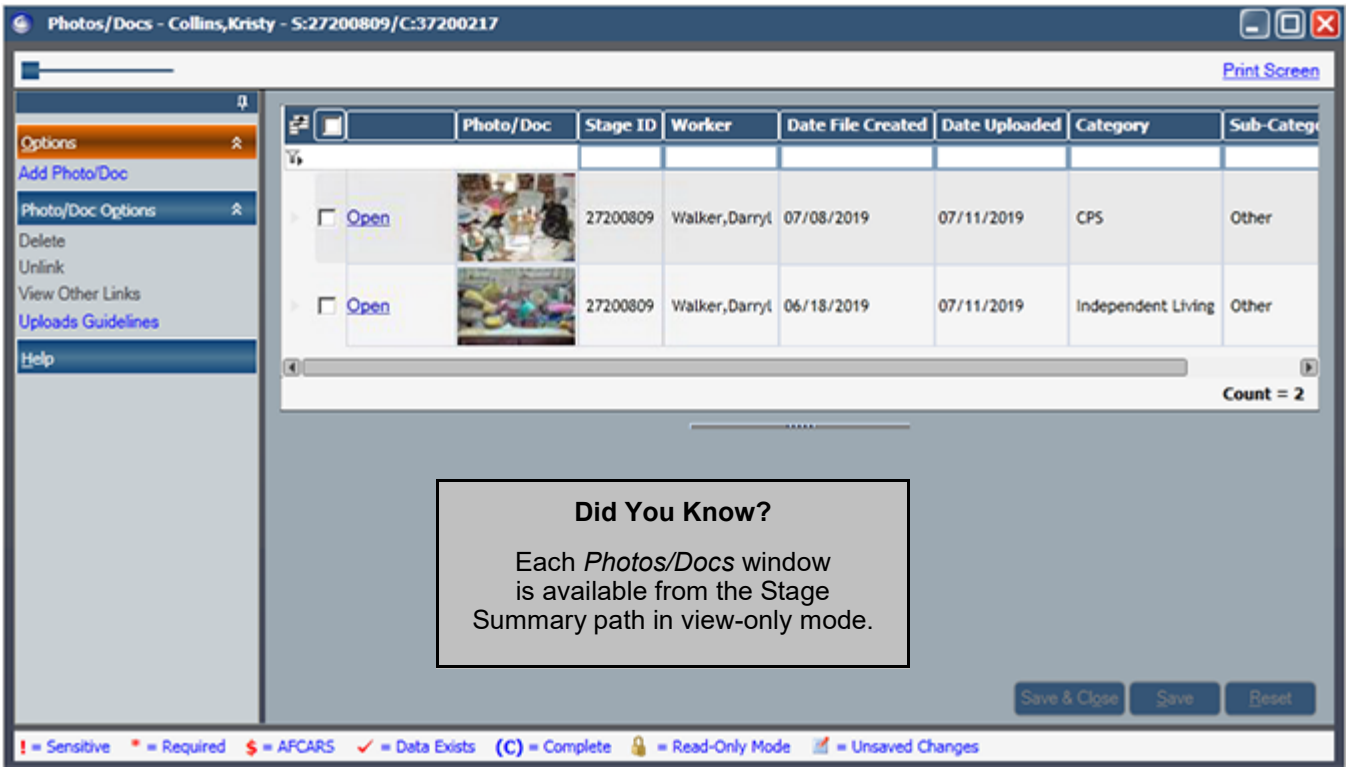
Module 5:
Working with Uploaded Photos and Documents

The Photos/Docs Window

The *Photos/Docs* window displays all photos and documents linked to a stage or stage action (i.e., progress note, Person ID, allegation, or health record). From this window, you can perform the following tasks:

- View specific information about a linked photo/document such as Stage ID, worker name, file type, dates created and uploaded, and file name.
- Modify the category, sub-category, and comments for a linked photo/document.
- Access the *Add Photos/Docs* window to link a new photo/document.
- Delete photos and documents linked to the stage or stage action.
- Unlink photos and documents to/from the stage or stage action.
- View other stage actions to which the photo/document is linked.

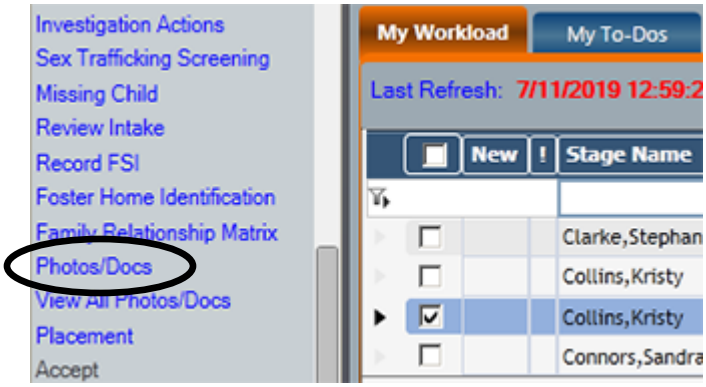
The *Photos/Docs* window exists at the stage level (for files linked to a stage itself) and for each stage action to which files can be linked.

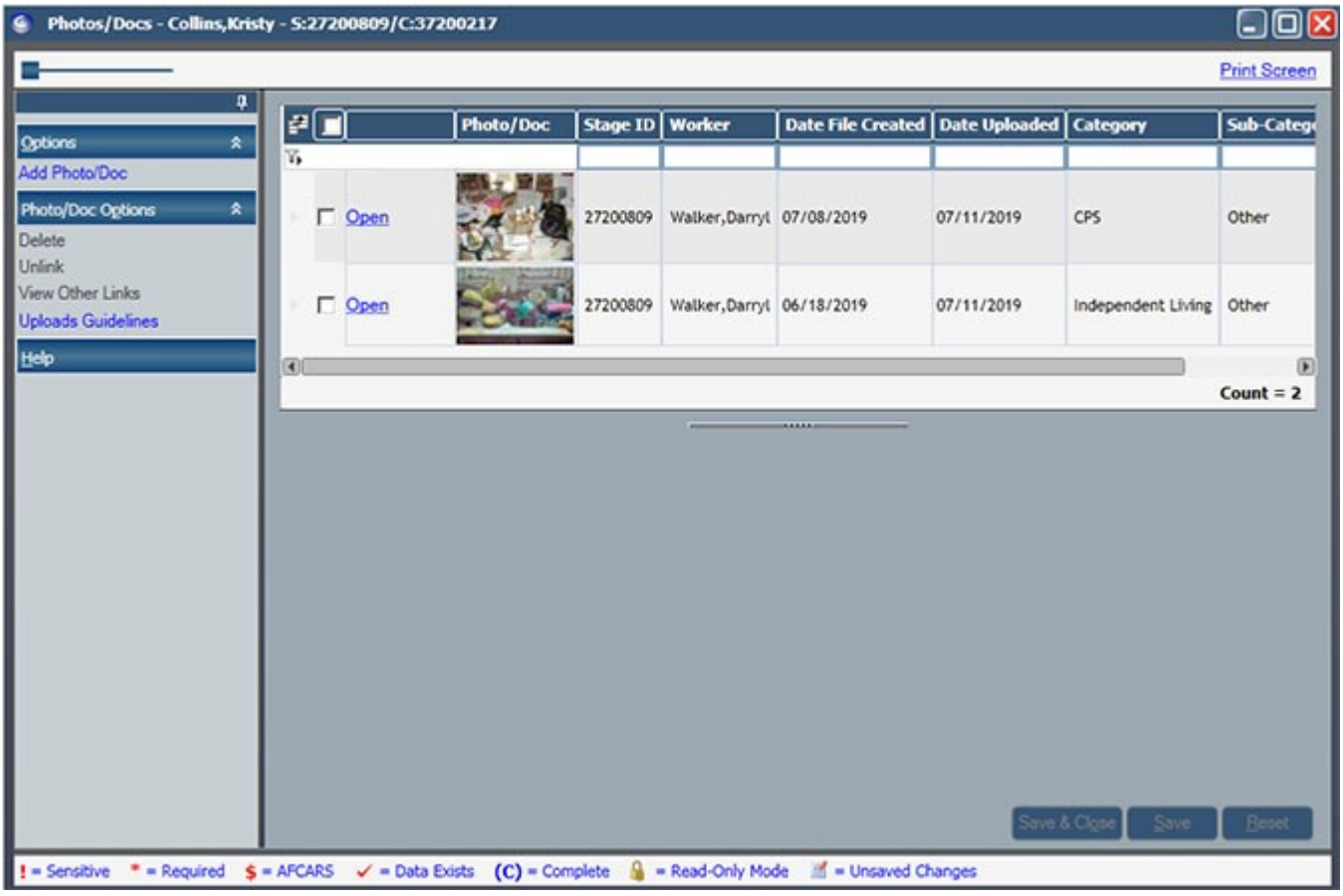


Step-by-Step: Accessing the Photos/Docs Window for a Stage

1 Select the appropriate stage on the **My Workload** tab.
*The **Stage Actions** section of the **NAVIGATION PANE** displays.*

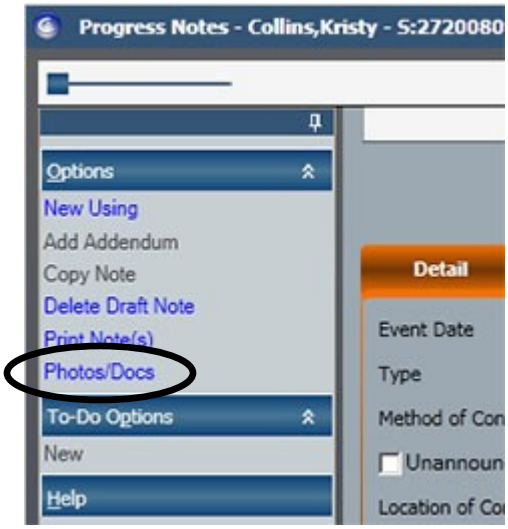
2 Click the **Photos/Docs** link in the **NAVIGATION PANE**.
The Photos/Docs window displays.

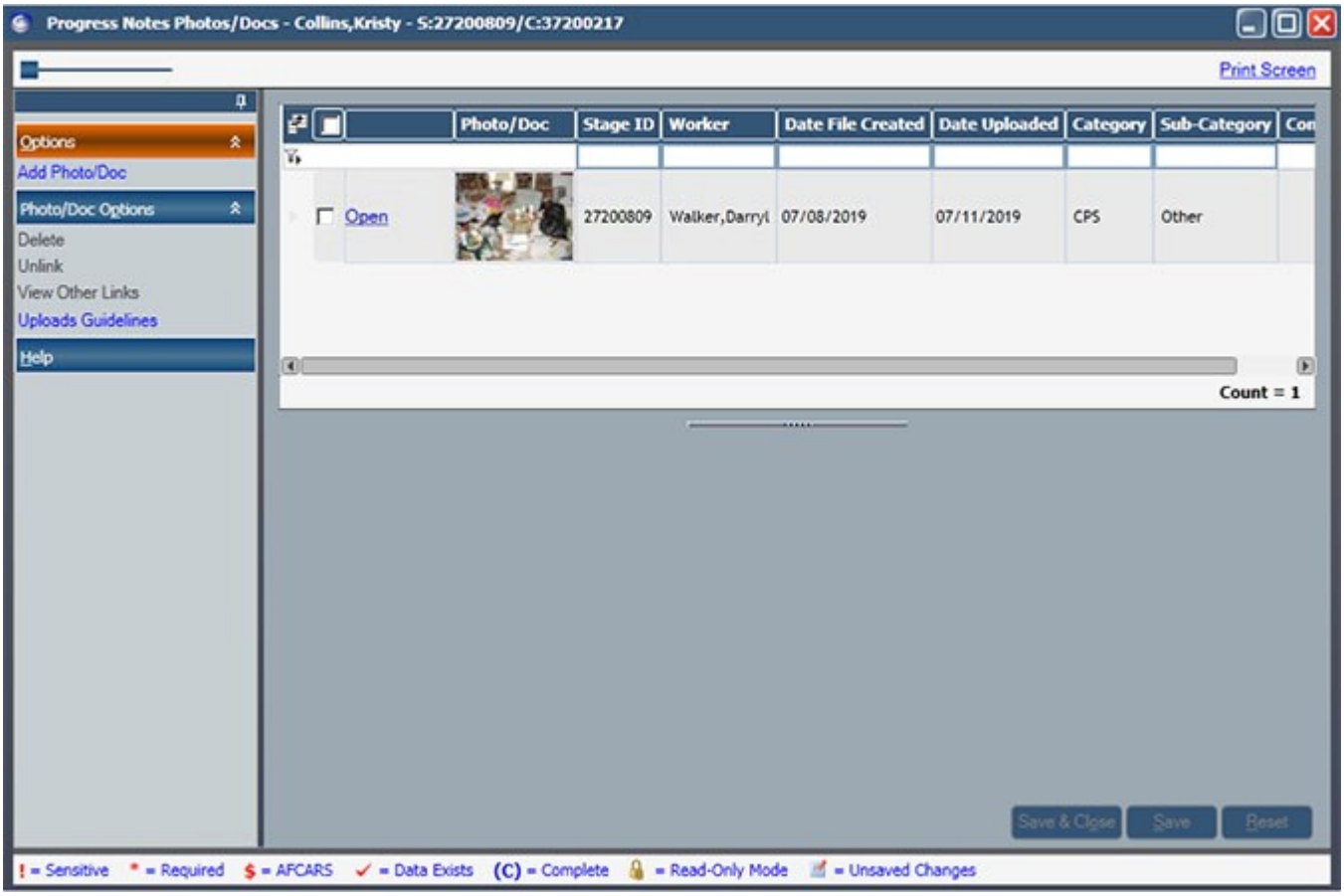




Step-by-Step: Accessing the Progress Notes Photos/Docs Window

1. Select the appropriate stage on the **My Workload** tab.
   *The **Stage Actions** section of the **NAVIGATION PANE** displays.*
2. Click the **Progress Notes** link in the **NAVIGATION PANE**.
   The Progress Notes window displays.
3. Select the progress note for which to view linked photos/ documents, or to which you want to link a photo/document.
   *The **NAVIGATION PANE** options display.*
4. Click the **Photos/Docs** link in the **NAVIGATION PANE**.
   The Progress Notes Photos/Docs window displays.





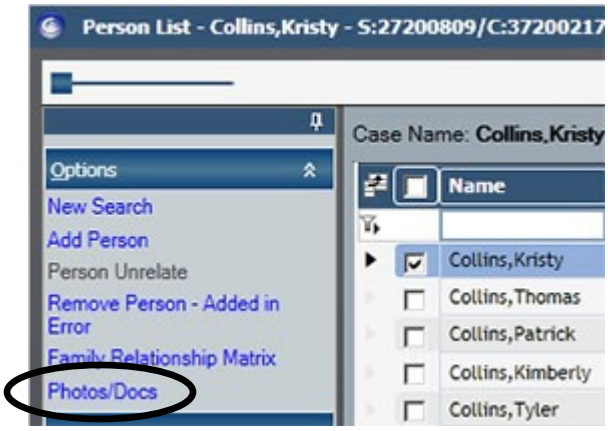
Step-by-Step: Accessing the Person Photos/Docs Window

1. Select the appropriate stage on the **My Workload** tab.
   *The **Stage Actions** section of the **NAVIGATION PANE** displays.*

2. Click the **Person List** link in the **NAVIGATION PANE**.
   The Person List window displays.

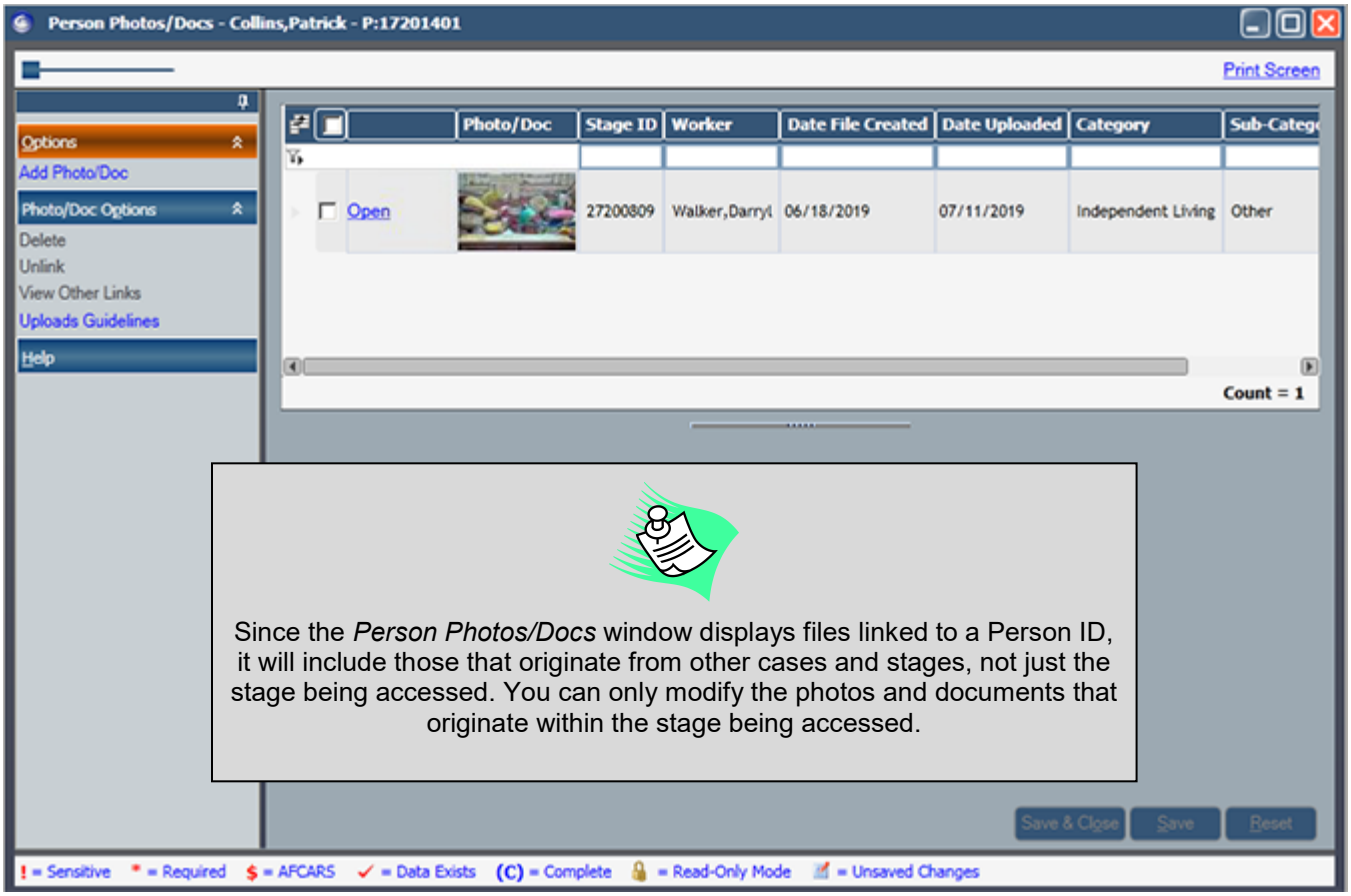
3. Select the person/Person ID for whom to view linked photos/documents, or to whom you want to link a photo/document.
   *The **NAVIGATION PANE** options display.*

4. Click the **Photos/Docs** link in the **NAVIGATION PANE**.
   The Person Photos/Docs window displays.



Did You Know?

If historical persons exist in the stage, you can access the *Person Photos/Docs* window through the *Historical Person List* window.



Since the *Person Photos/Docs* window displays files linked to a Person ID, it will include those that originate from other cases and stages, not just the stage being accessed. You can only modify the photos and documents that originate within the stage being accessed.

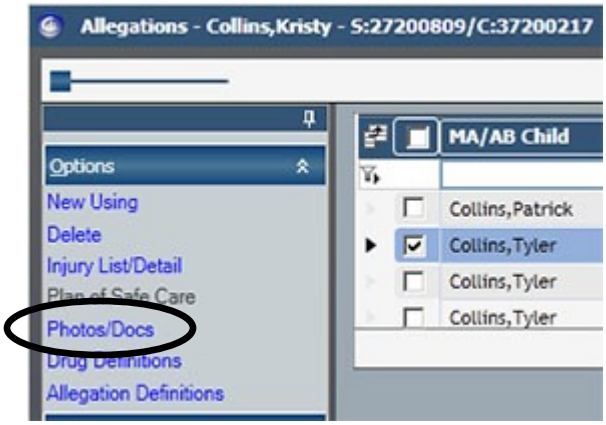
Step-by-Step: Accessing the Allegation Photos/Docs Window

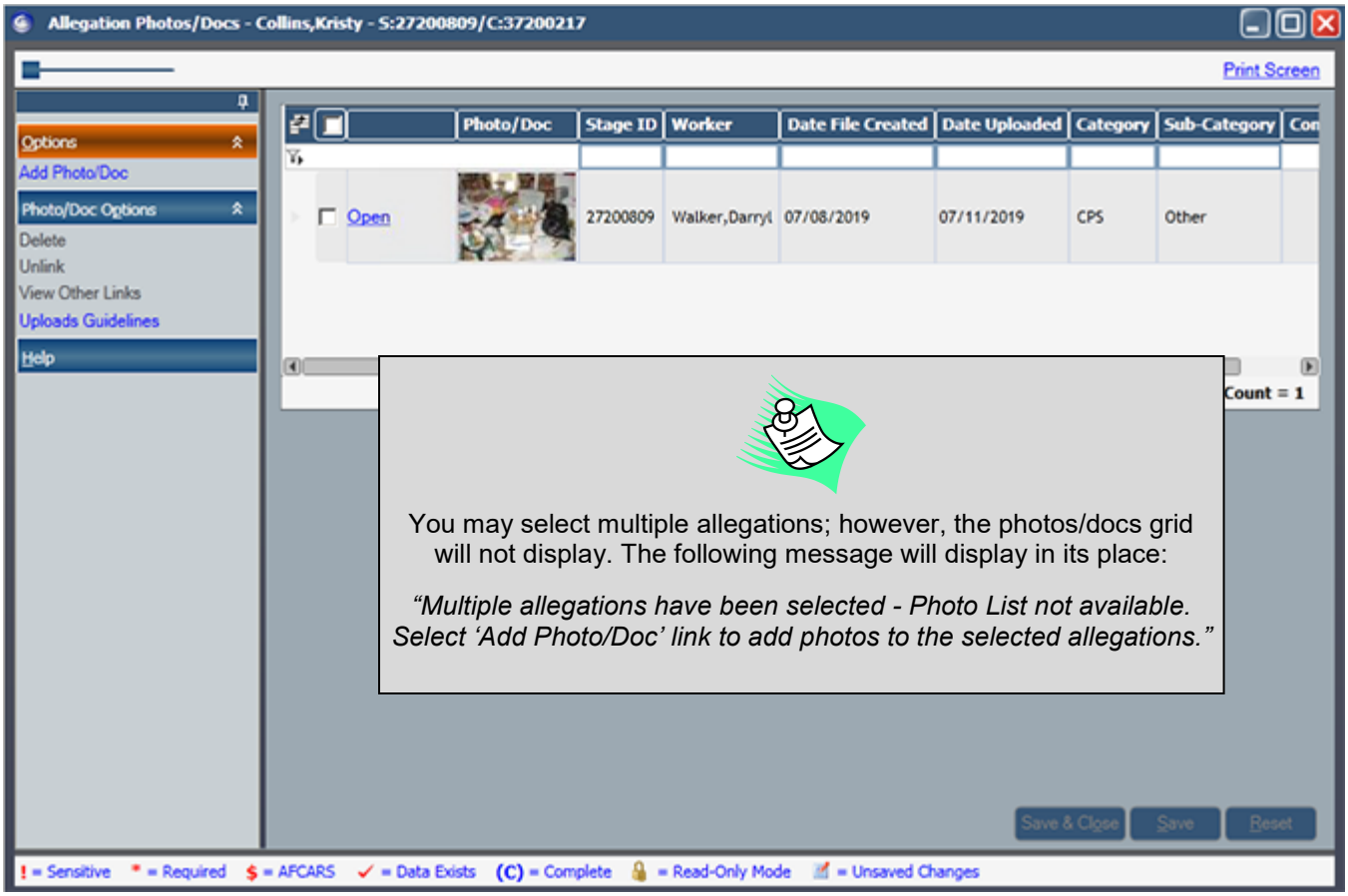
1 Select the appropriate Investigation (INV) stage on the **My Workload** tab.
*The **Stage Actions** section of the **NAVIGATION PANE** displays.*

2 Click the **Allegations** link in the **NAVIGATION PANE**.
The Allegations window displays.

3 Select the allegation for which to view linked photos/documents, or to which you want to link a photo/document.
*The **NAVIGATION PANE** options display.*

4 Click the **Photos/Docs** link in the **NAVIGATION PANE**.
The Allegation Photos/Docs window displays.





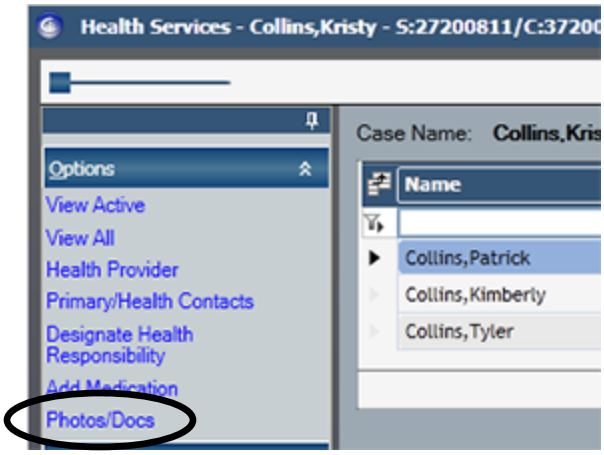
Step-by-Step: Accessing the Health Services Photos/Docs Window

1. Select the appropriate Family Services Stage (FSS) on the **My Workload** tab.
   *The **Stage Actions** section of the **NAVIGATION PANE** displays.*

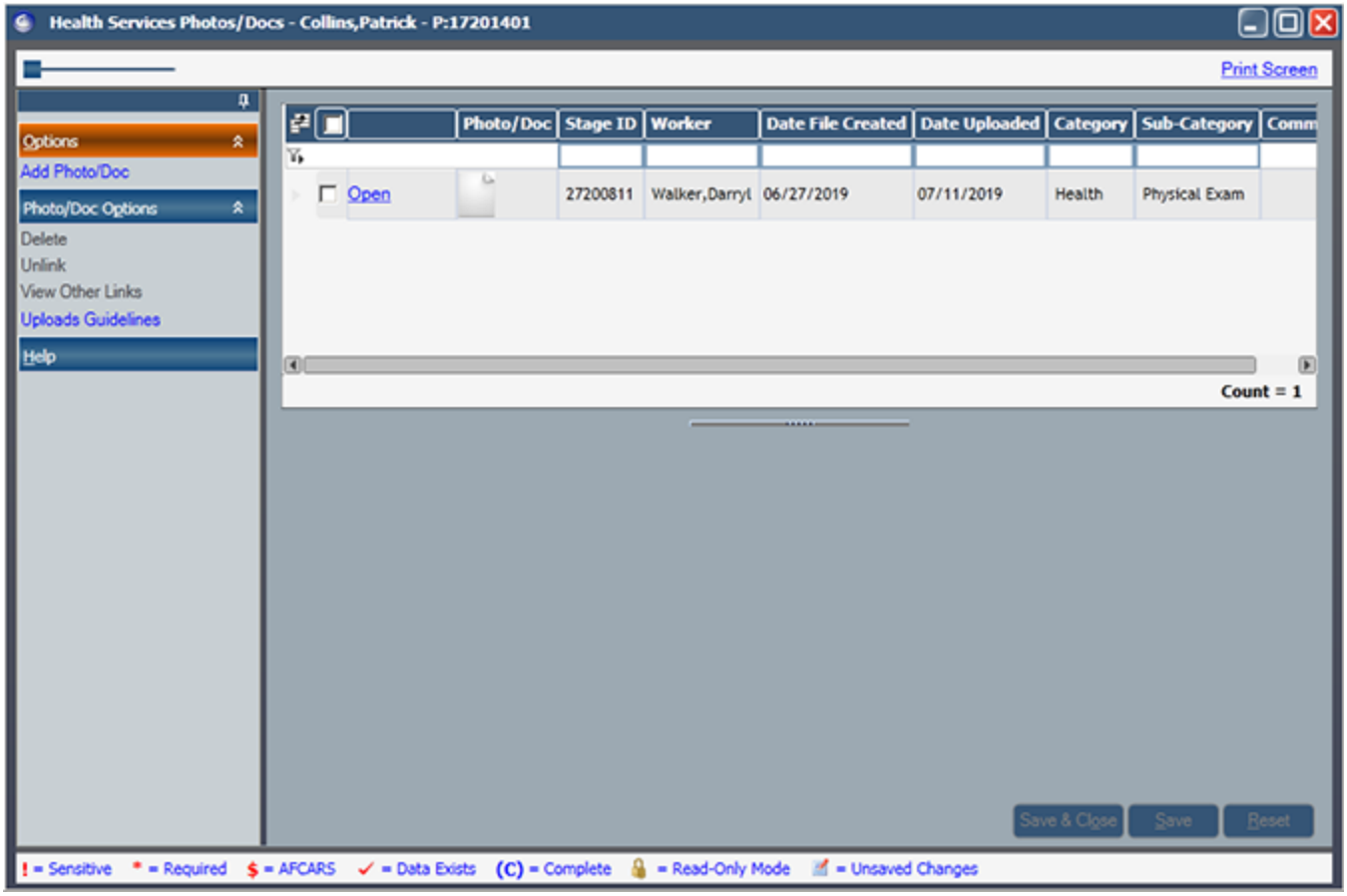
2. Click the **Health Services** link in the **NAVIGATION PANE**.
   The Health Services window displays.

3. Select the child for whom to view linked photos/ documents, or to whom you want to link a photo/ document.
   *The **NAVIGATION PANE** options display.*

4. Click the **Photos/Docs** link in the **NAVIGATION PANE**.
   The Health Services Photos/Docs window displays.



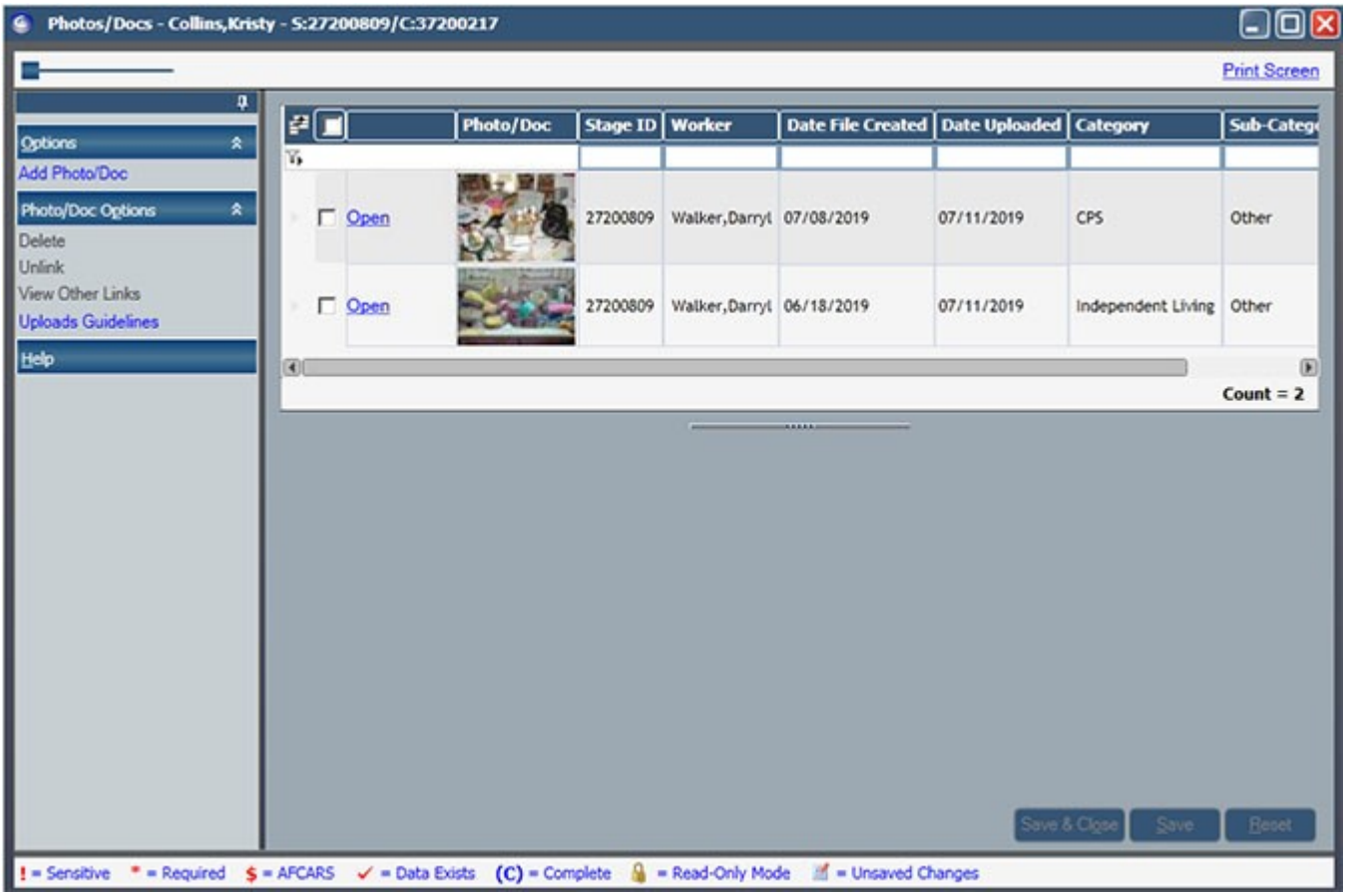
If you do not have the security required to modify health information for the selected child, the **Photos/Docs** link will be disabled.



Photos/Docs Window Overview

The *Photos/Docs* window contains a title bar, **NAVIGATION PANE**, and grid listing all photos and documents linked to the stage or stage action.

When you select a photo or document in the grid, **NAVIGATION PANE** links enable for opening the *Add Photos/Docs* window, deleting linked photos/documents, unlinking photos/documents, opening the *Other Links* window, and reviewing Upload Guidelines. (Refer to page 23 for detailed information regarding these **NAVIGATION PANE** links.)



The Photos/Docs Grid

Linked photos and documents are listed in the grid in descending order by Date Created. The following columns display in the grid:

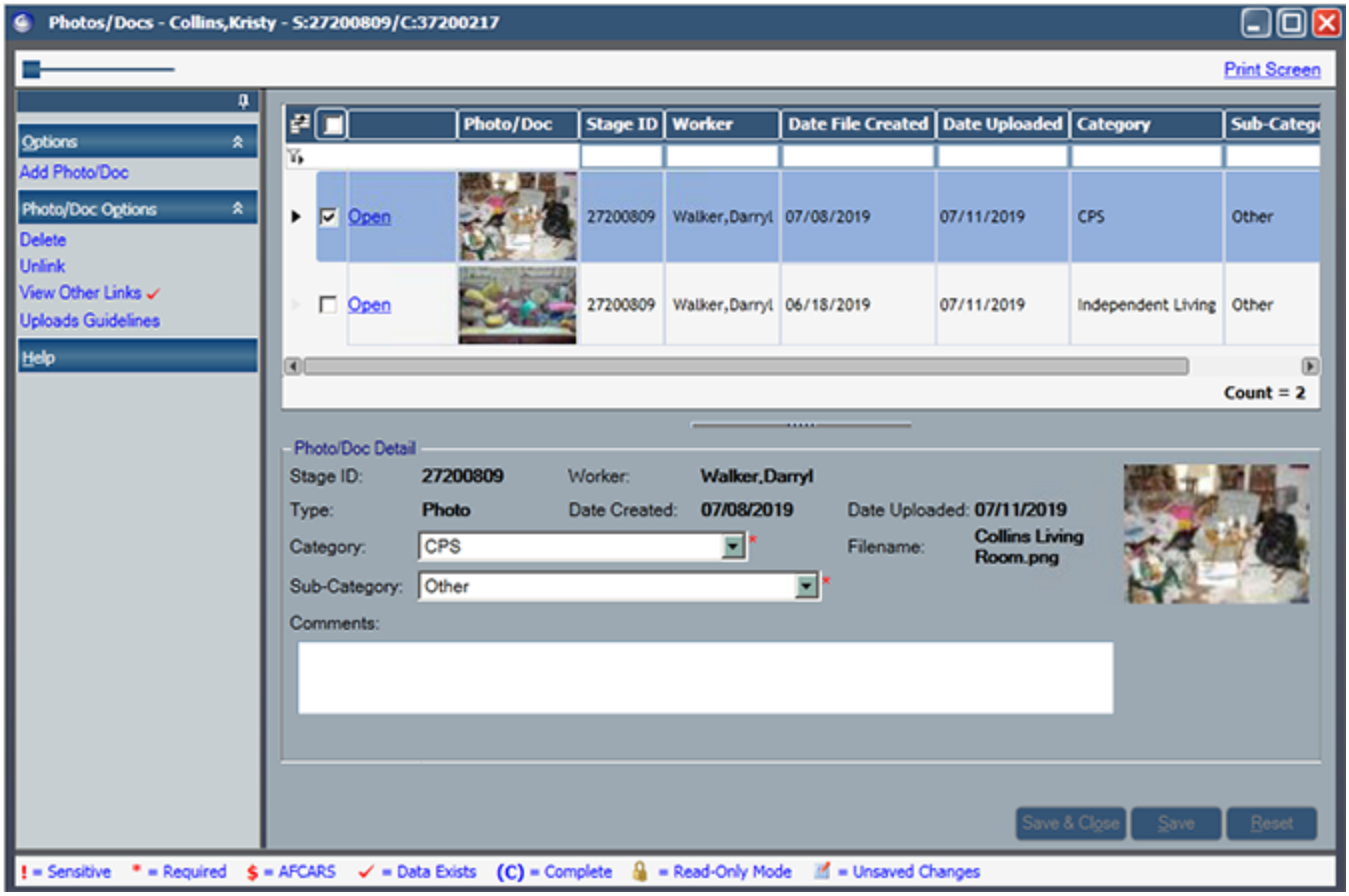
- Checkbox (for multi-select)
- **Open** link
- Photo/Doc
- Stage ID
- Worker
- Date File Created
- Date Uploaded
- Category
- Sub-Category
- Comments
- Filename

For column descriptions, refer to page 11.

All columns in the grid may be filtered and sorted with the exception of the checkbox, **Open** link, **Photo/Doc**, and **Comments** columns.

Modifying Category, Sub-Category, and Comments

Only the **Category**, **Sub-Category**, and **Comments** fields are modifiable for a file selected in the grid. If comments already exist, you can revise or add to them. You may also change the values in the **Category** and **Sub-Category** fields, if appropriate.



You can update these fields for multiple files at one time. However, if one of the photos or documents selected already has recorded comments, the following message will display with an **OK** button:

"Data exists. Row(s) not available for multi-select for comment entry."

You can proceed with modifying category and sub-category for the selected files, but you will not be able to modify comments. This is intended to help prevent workers from unintentionally over-writing comments that already exist.

The **Save & Close**, **Save**, and **Reset** buttons enable when changes exist.

Did you know?

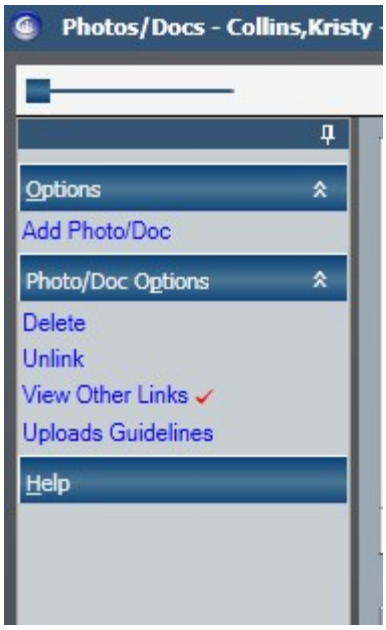
District workers must upload pre-dispositional court orders under Article 7 (Person In Need of Supervision [PINS]) petitions using the category of "Legal" and sub-category of "Placement Order."

Detailed information regarding PINS Reform Changes can be found in Administrative Directive 19-OCFS-ADM-22, located on the OCFS Internet and intranet sites.

Appendix B of this Job Aid contains "ATTACHMENT A" of 19-OCFS-ADM-22, which provides detailed information on the steps that must be taken in CONNECTIONS for these youth.

The Photos/Docs NAVIGATION PANE Links

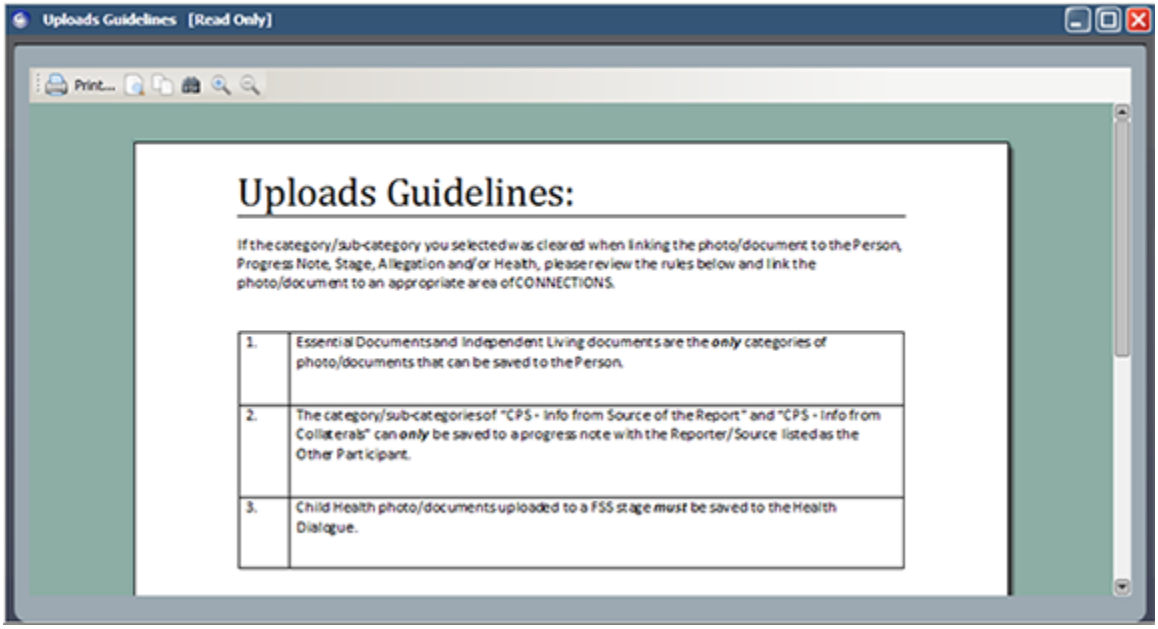
The following links display in the **NAVIGATION PANE**:



- **Add Photo/Doc** - The **Add Photo/Doc** link provides access to the *Add Photos/Docs* window, which is where you can link a photo/document to the stage or stage action. (Refer to page 25 for detailed information on this window.)
- **Delete** - Clicking the **Delete** link removes the selected file(s) from the database. You must record a reason when deleting a photo/document.
- **Unlink** - Clicking the **Unlink** link removes the link between the selected file(s) and the stage or stage action. Once the link is removed, the file(s) will be returned to the **My Uploads** tab if no other links exist.

> **Did You Know?**
>
> You cannot unlink photos and documents that originated from a different stage or that were uploaded by another district/agency.

- **View Other Links** - The **View Other Links** link provides access to the *Other Links* window, on which you can discover the other stage actions to which a photo/document is linked. (Refer to the following page for detailed information on this window.)
- **Uploads Guidelines** - The **Uploads Guidelines** link displays the read-only *Uploads Guidelines* window containing specific rules related to **Category** and **Sub-Category** field selections.

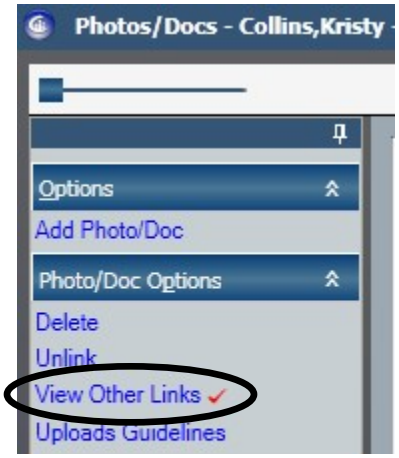


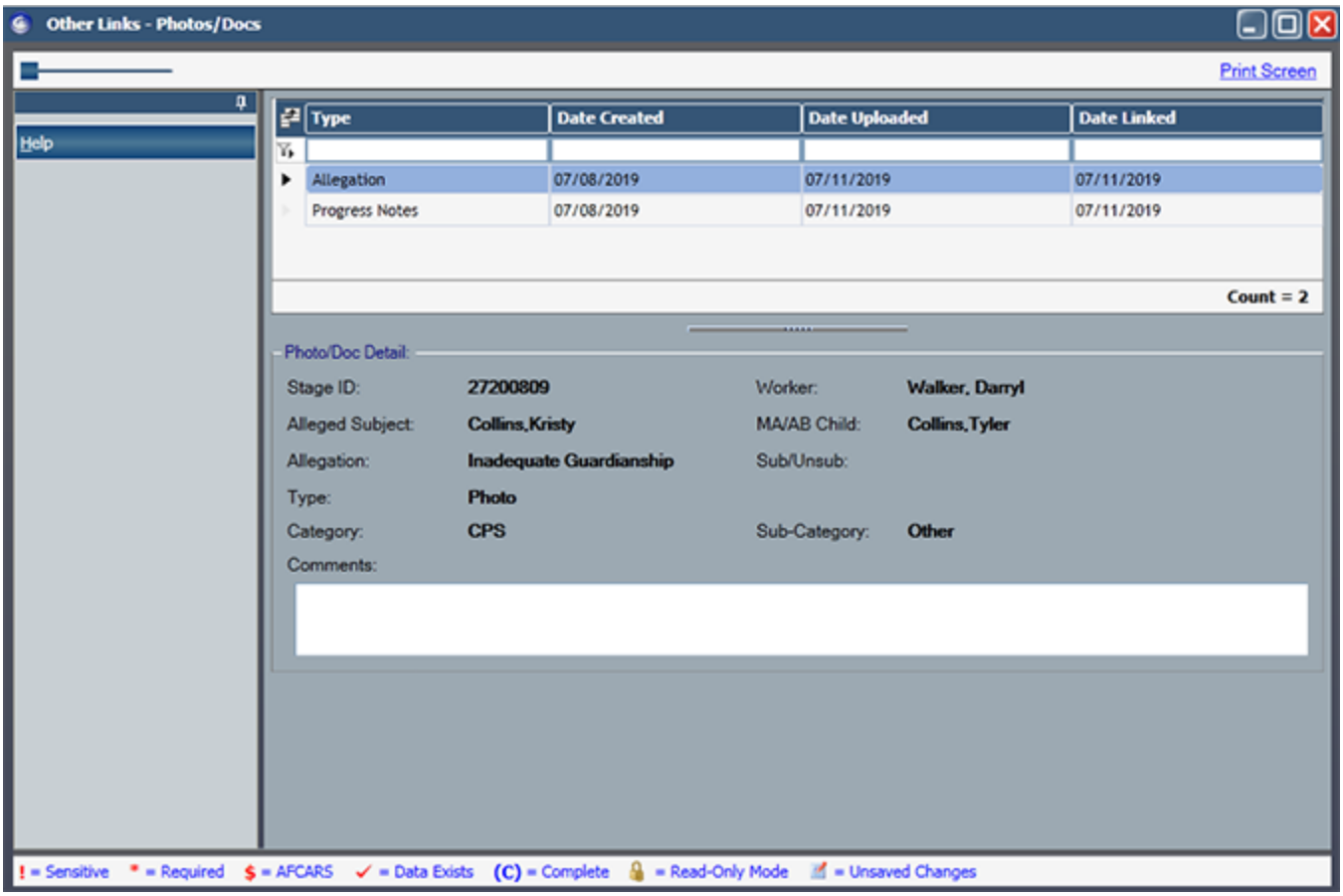
The Other Links Window

Since a photo/document may be linked to multiple stage actions, you can use the *Other Links* window to find out which links exist.

Upon selecting a photo/document on the *Photos/Docs* window, if other links exist for the file, a red checkmark displays next to the **View Other Links** link in the **NAVIGATION PANE**. Clicking this link opens the *Other Links* window.

The *Other Links* window displays a grid that lists all links for the photo/document, including the type of link (i.e., Person, Progress Note, Allegation, or Health) and the dates the file was created, uploaded, and linked.



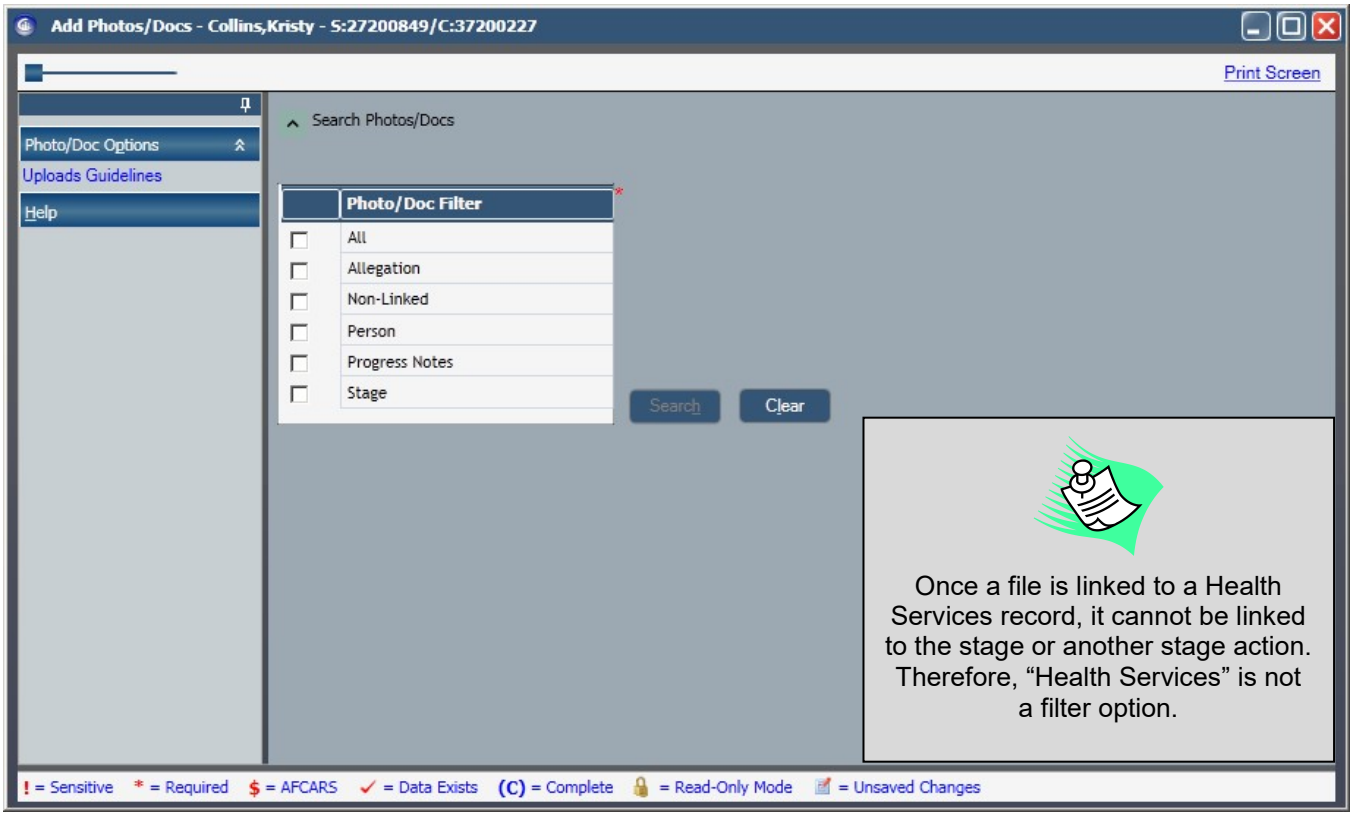


Linking a Photo or Document: The Add Photos/Docs Window

The *Add Photos/Docs* window is the location where you can complete the required link between a photo/document and a stage or stage action. A photo/document can be linked to multiple stage actions, with the exception of those linked to a Health Services record. You can access this window by clicking the **Add Photo/Doc** link in the **NAVIGATION PANE** of the *Photos/Docs* window.

Add Photos/Docs Window Overview

Upon opening this window, it is populated with the **Search Photos/Docs** section where you can search for the photo(s)/document(s) to link to the stage or stage action.



The **Photo/Doc Filter** column displays the filter options/search criteria. Multiple options may be selected and at least one is required. You can search for all photos/documents, those linked to a stage or specific stage action, and/or those that have not been linked and still appear on the **My Uploads** tab ('non-linked'). The following filter options are available:

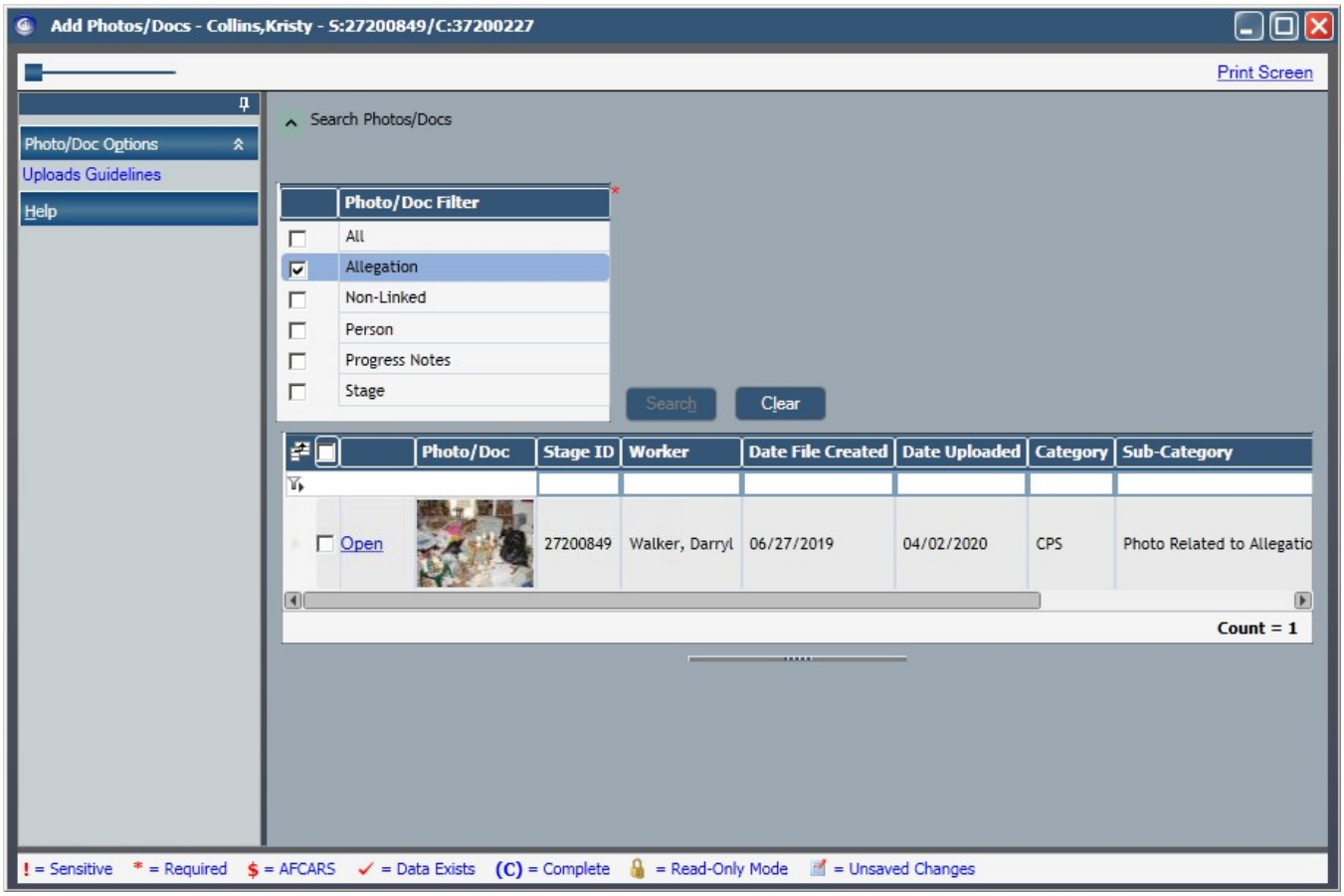
- **All** - Photos and documents linked to this stage or any stage action within it (except for Health Services), plus all photos and documents on the **My Uploads** tab
- **Allegation** - Photos and documents linked to allegations in the stage
- **Non-Linked** - Photos and documents that have not been linked to a stage or stage action and display on the **My Uploads** tab
- **Person** - Photos and documents linked to Person IDs (active and end-dated) in the stage
- **Progress Notes** - Photos and documents linked to progress notes in the stage
- **Stage** - Photos and documents linked to the stage

Completing Your Search

After selecting the photo/doc filter(s), the **Search** and **Clear** buttons enable. Clicking the **Clear** button removes any selections in the filter grid.

Clicking the **Search** button generates search results that display in a photos/docs grid below the **Search Photos/Docs** section. A photo/document may display multiple times in the grid if it has been linked to multiple stage actions.

For information on the photos/docs grid, see page 21.



Selecting and Linking the Photo/Document

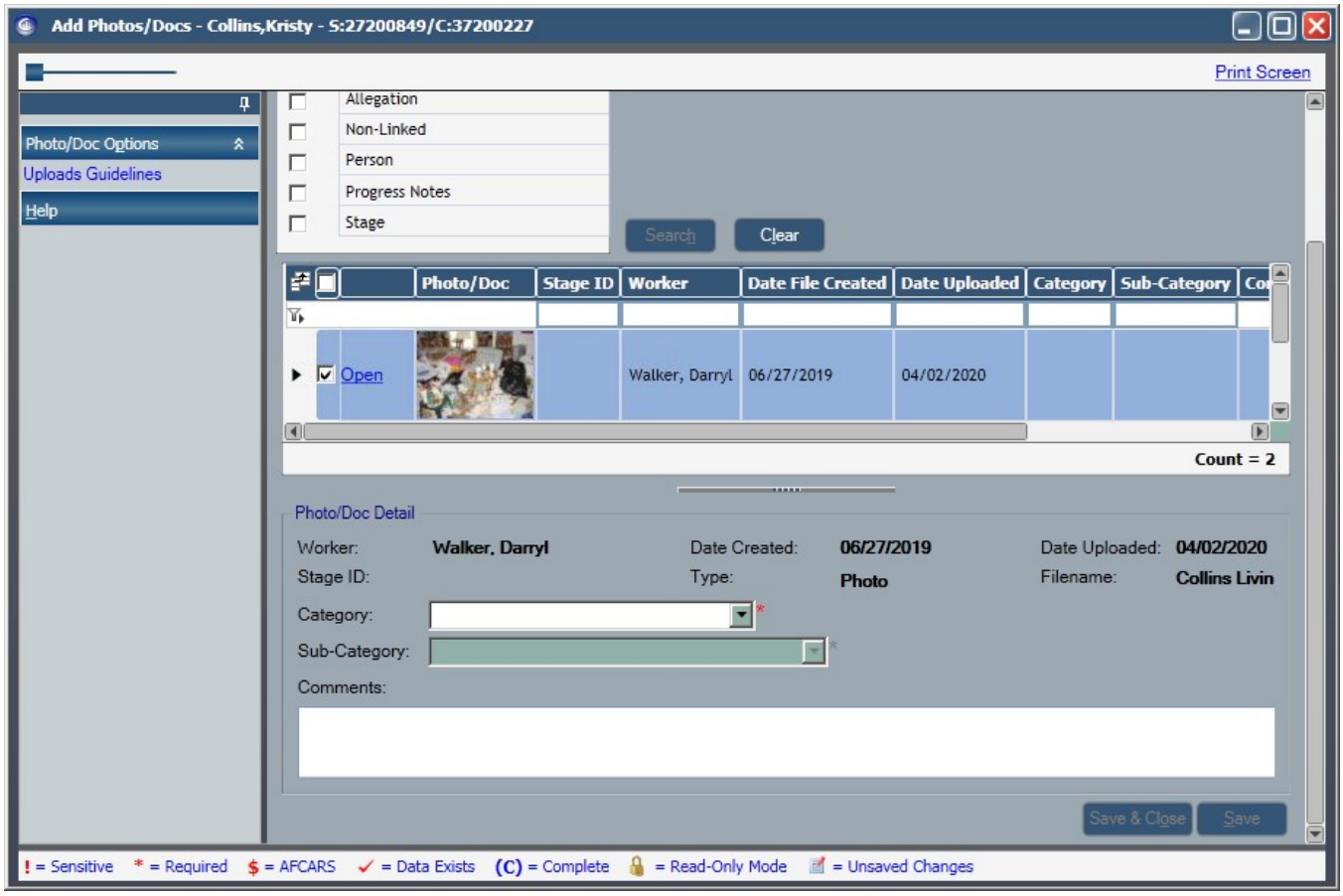
When you select a photo/document from the grid, the **Photo/Doc Detail** section displays with the **Save & Close** and **Save** buttons below it. Only the **Category**, **Sub-Category**, and **Comments** fields are modifiable in this section.

Once you have selected the appropriate photo(s) and/or document(s) in the grid, click the **Save & Close** or **Save** button to complete the link to the stage/stage action.

For detailed information on recording a category and sub-category, see page 13.

Step-by-Step: Linking a Photo or Document to a Stage or Stage Action

1. On the *Photos/Docs* window for the appropriate stage or stage action, click the **Add Photo/Doc** link in the **NAVIGATION PANE**.
   The Add Photos/Docs window displays.
2. Select the desired option(s) in the **Photo/Doc Filter** column.
   *The **Search** and **Clear** buttons enable*.
3. Click the **Search** button.
   The photos/docs grid displays with search results listed in descending order by Date File Created.
4. Select the photo(s) and/or document(s) you wish to link.
   *The **Photo/Doc Detail** section displays.*
5. Click the drop-down menu for the **Category** field and select a category (if not already recorded).
   *The **Sub-Category** field enables.*
6. Click the drop-down menu for the **Sub-Category** field and select a sub-category (if not already recorded).
7. In accordance with your agency's guidelines, record a description in the **Comments** field (if not already recorded).
8. Click the **Save & Close** or **Save** button to save the link.



Additional Uploads Tools

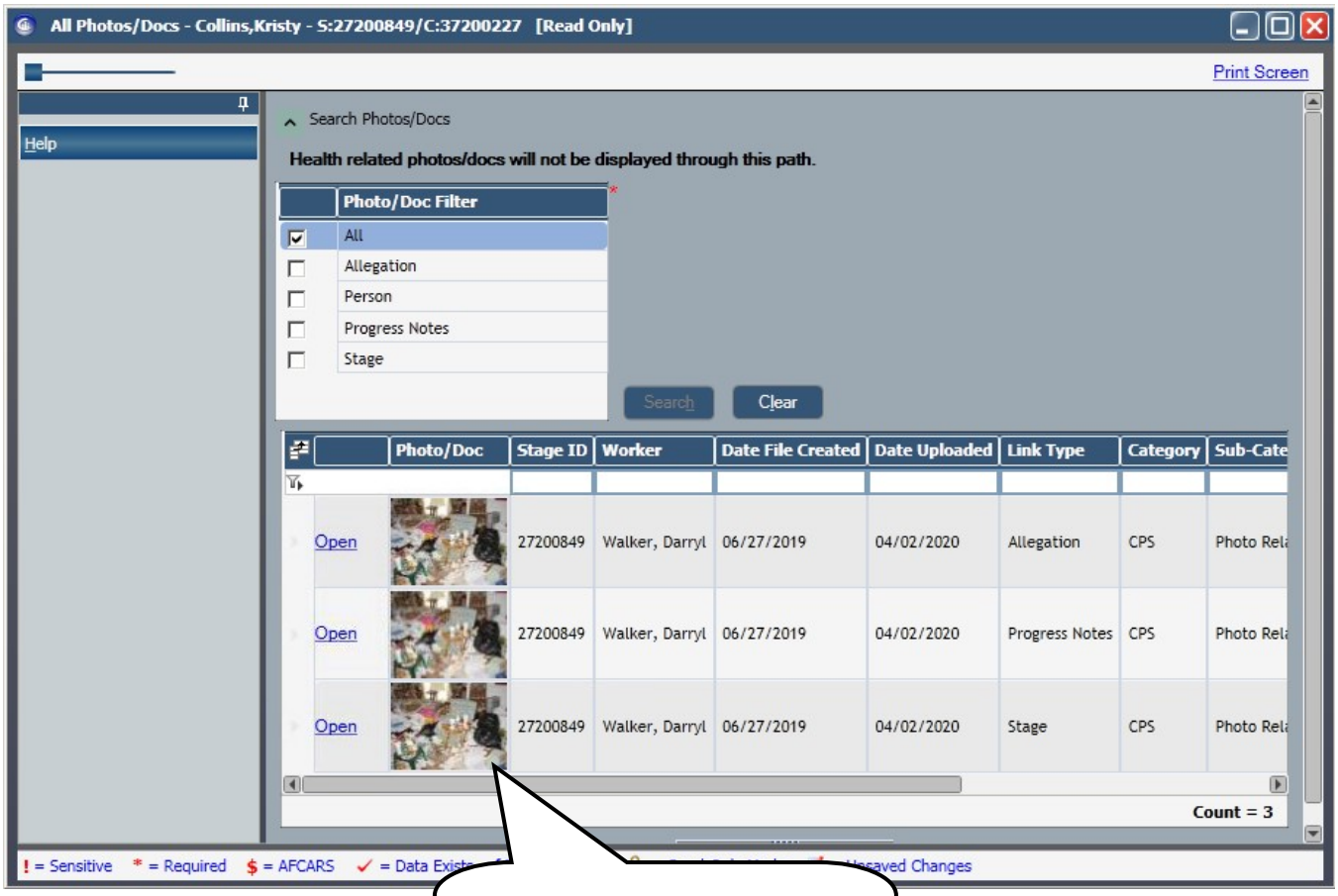
After photos and documents have been integrated into CONNECTIONS, there are certain tools that can assist you in searching for and viewing files.

The All Photos/Docs Window

The **View All Photos/Docs** link displays on the **NAVIGATION PANE** of the main CONNECTIONS window when a stage (other than an INT or ARI) is selected. Clicking the link opens the *All Photos/ Docs* window, which displays the photos and documents linked to the stage and its stage actions.

This window is read-only and contains a photo/doc filter grid where you select which photos/documents you wish to view based on link type. At least one option must be selected to enable the **Search** button.

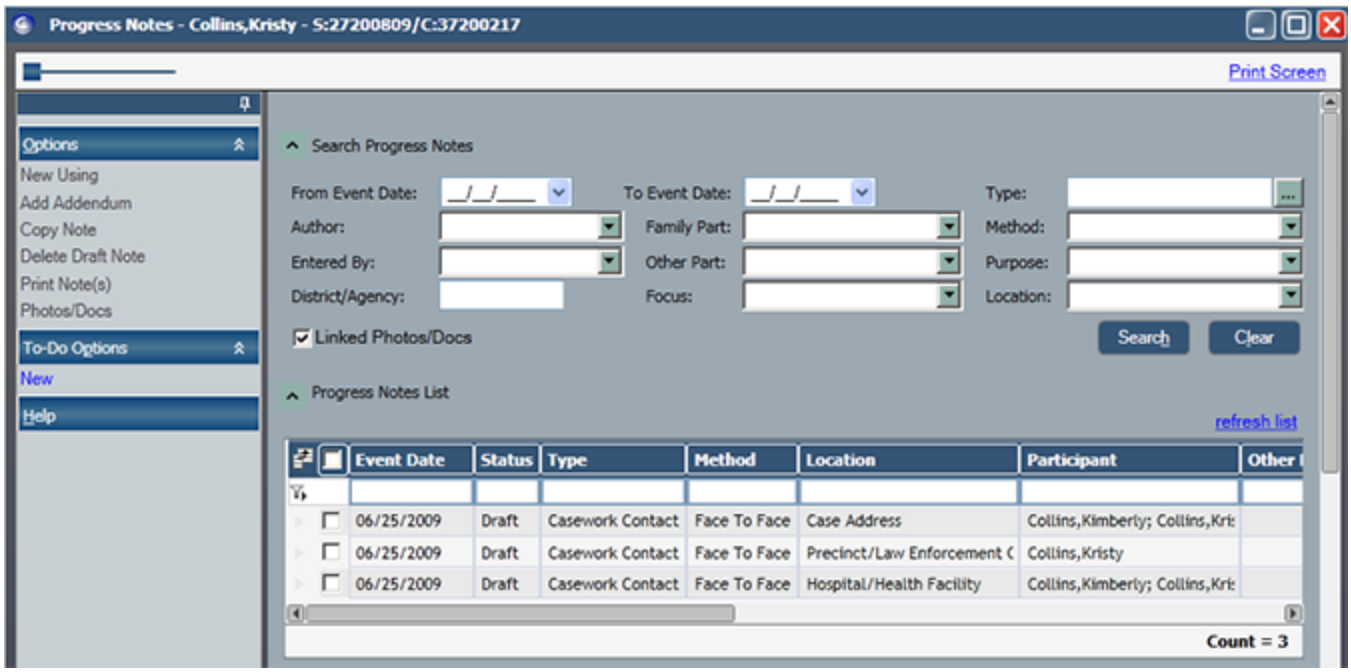
For detailed information on using the photo/doc filter grid, see page 25.



A photo/document may display in the grid multiple times if it has been linked to multiple stage actions.

Searching for Progress Notes with a Photo/Doc Link

The **Linked Photos/Docs** checkbox on the *Progress Notes* window allows you to narrow your progress notes search to those that are linked to a photo or document. You can select the checkbox and click the **Search** button to view all notes with a link, or you may use other search criteria in conjunction with the checkbox to further narrow your search.



Step-by-Step: Searching for All Progress Notes with a Photo/Doc Link

1 Select the appropriate stage on the **My Workload** tab.
*The **Stage Actions** section of the **NAVIGATION PANE** displays.*

2 Click the **Progress Notes** link in the **NAVIGATION PANE**.
The Progress Notes window displays.

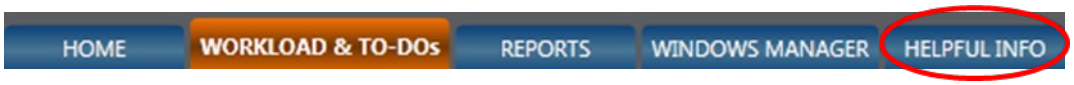
3 Select the **Linked Photos/Docs** checkbox.

4 Click the **Search** button.
The progress notes grid displays all notes that have a linked photo and/or document.

Module 6:
Resources

HELPFUL INFO Tab in CONNECTIONS

The **HELPFUL INFO** tab contains a filterable grid featuring CONNECTIONS Tip Sheets, Job Aids, and other valuable documentation. By default, the documents are organized first by area, then by document type, then by document description. A document can be opened by clicking the **Navigate** link associated with it. Filter rows can be used to quickly locate specific documents or sets of documents.



OCFS CONNECTIONS Internet Site

Many resources are available for you on the **Step-by-Step/Job Aids/Tips** page of the OCFS CONNECTIONS Internet site (https://ocfs.ny.gov/connect/jobaides/). There you will find resources such as Job Aids, Tip Sheets, and Quick Start Guides. These documents and others will provide you with the most up-to-date information on CONNECTIONS.

CONNECTIONS Regional Implementation Staff

If you cannot find the answer to your question(s) within the documentation mentioned above, you can contact one of the many statewide CONNECTIONS Regional Implementation Staff members. The current list of members is always available on the OCFS CONNECTIONS Internet site (https://ocfs.ny.gov/connect/contact.asp) and intranet site (http://ocfs.state.nyenet/connect/contact.asp).

ITS Service Desk

The Office of Information Technology Services (ITS) Service Desk is charged with supporting agency and county customers with their IT needs. ITS has a team of Customer Service Agents ready to provide technical support and answer your questions. Contact the ITS Service Desk by:

Phone: **1-844-891-1786**

Email: **Fixit@its.ny.gov**

Chat: **https://chat.its.ny.gov** (requires connectivity to the Information Technology Services Management [ITSM] system)

Your agency may have procedures in place for contacting the ITS Service Desk; check with your supervisor before doing so.

Application Help Mailbox

NYS CONNECTIONS User Support/Triage staff can be contacted at **ocfs.sm.conn_app@ocfs.ny.gov** to assist with complex application issues. Prior to emailing the Application Help Mailbox, you must obtain a ticket number from the ITS Service Desk (see above for contact information) to reference in your correspondence with triage staff.

Professional Development Program

Another resource is the CONNECTIONS Training Project of the Professional Development Program, Rockefeller College, University at Albany. CONNECTIONS trainers can provide you with assistance when you have a question about or are experiencing an issue with any area of CONNECTIONS. For assistance from a CONNECTIONS representative, contact the Professional Development Program at **CONNECTIONS@albany.edu**. Be sure to include your name, contact information, and your question or issue. A CONNECTIONS representative will respond as promptly as possible by email and/or phone.

Appendix A:
Administrative Directive 19-OCFS-ADM-13

Andrew M. Cuomo
Governor

52 WASHINGTON STREET
RENSSELAER, NY 12144

Sheila J. Poole
Commissioner

Administrative Directive

Transmittal:	19-OCFS-ADM-13
To:	Commissioners of Social Services Executive Directors of Voluntary Authorized Agencies
Issuing Division/Office:	Child Welfare and Community Services
Date:	September 4, 2019
Subject:	**Uploading Documents/Photos to CONNECTIONS**
Suggested Distribution:	Directors of Social Services Directors of Voluntary Agencies Child Protective Services Supervisors Child Welfare Supervisors Foster Care Supervisors CONNECTIONS Implementation Coordinators
Contact Person(s):	See VII.
Attachments:	

Filing References

Previous ADMs/INFs	Releases Cancelled	NYS Regs.	Soc. Serv. Law and Other Legal Refs.	Manual Ref.	Misc. Ref.
13-OCFS-ADM-01 17-OCFS-LCM-14				OCFS CPS Manual Chapter 6, Section G, p. G-7	

I. Purpose

The purpose of this Administrative Directive (ADM) is to provide an overview of the new "Uploads" functionality in the New York State Child Welfare Information System (CONNECTIONS). The **Uploads** function allows users to upload photographs and documents within CONNECTIONS, and link them to a stage, person, progress note, allegation, or health record where they can then be accessed by other users assigned a role in the stage where the uploaded file is located.

II. Background

CONNECTIONS is the child welfare database that allows for the documentation of the delivery of child welfare services to families and children in New York State. Documentation in CONNECTIONS provides a historical record of information that is easily and instantaneously shared with other users. CONNECTIONS provides data at the local and state level to support planning, the assessment of trends, performance levels, and resource needs. Data in CONNECTIONS is also used to conduct Statewide Central Register (SCR) database checks for potential foster parent, adoptive parents, child care workers, and day care workers.

Currently, many local departments of social services (LDSSs) and voluntary authorized agencies (VAs) in New York State maintain their own secure network databases for purposes of storing digital photographs, scanned documents, vital records documents, or other records and information pertinent to the provision of services. These databases are internal to each LDSS or entity and the stored information is not always easily shared with others who may require it, especially when the child or family moves to another LDSS within New York State.

The **Uploads** function in CONNECTIONS will enable users to place digital photographs, documents, or other relevant files directly into CONNECTIONS, thereby promoting an increased ability to safely store case-related information and to make this information available to other caseworkers having a business need to review the information.

III. Program Implications

LDSSs and VAs both accumulate and generate substantial documentation as part of the case record during their regular course of business in providing a multitude of services to children and families throughout the state. Whether promoting the safety of children and families or coordinating the provision of services, these documents are used frequently, and are often necessary to help families ensure the safety of their children and to achieve permanency.

The **Uploads** function allows for the flexibility of each LDSS to determine how it can best support its own needs and enhance its casework practices, with the intent that uploaded files will be used to support the documentation already built into CONNECTIONS. Improving accessibility to documents and information within CONNECTIONS will enable users to operate with greater efficiency and accuracy when working with children and families.

When uploading files, users will have the option to select a stage with which they may directly associate a file, or upload without any stage association and assign a stage later. After a file has been successfully uploaded, users are required to assign a category and subcategory for each file in CONNECTIONS, which will provide a general organizational framework for the uploaded files.

Until such time that OCFS provides further policy guidance regarding specific content that must be uploaded to CONNECTIONS, each LDSS and VA should review its current protocols and business processes to help become informed on how to use this new

functionality. LDSSs and VAs will still be required to maintain case records as outlined in regulation 18 NYCRR-NY 428.10(a). While CONNECTIONS is considered the official, comprehensive case record, LDSSs and VAs are encouraged to take a thoughtful and incremental approach to what they upload into CONNECTIONS and what they continue to maintain in paper form or electronically outside of CONNECTIONS.

IV. Required Action

Uploading to CONNECTIONS

Users with the **FILE UPLOAD** business function will be able to access the **Uploads** page from a Uniform Resource Locator (URL).

The **Uploads** URL is: https://cw.ocfs.ny.gov/connectionsupload.

The purpose of the URL, as opposed to a direct upload function within the CONNECTIONS application, is to enable an increased security protocol and effective virus protection.

Up to 10 photos and/or documents can be uploaded at one time. The following specifications are required to upload a file to CONNECTIONS:

- Only the following types of files can be uploaded: .doc, .xls, .xlsx, .docx, .txt, .rtf, .pdf, .bmp, .jpeg, .jpg, .png, .tiff, and .tif.
- The file name can be a maximum of 200 characters.
- The file size cannot be larger than 95 megabytes.
- Files cannot be password protected.

Upon navigating to the uploads page using the URL, the stages on the caseworker's workload in CONNECTIONS will display. Clicking the **Select** link for a stage in the grid will display a web page where one can upload photographs and documents that will be associated with the selected stage.

Clicking the **Upload Without Stage Assignment** link, located above the workload grid, will display a web page where one can upload photographs and documents without associating it with a stage.

Uploaded files are sent from the URL to the **My Uploads** tab in CONNECTIONS. The **My Uploads** tab is a central location where one can manage the uploaded files before they are sent to their permanent destination within CONNECTIONS and become part of the permanent official case record. From this tab one can view the photo/document, and will be able to view information about it such as the user who uploaded it, date created, date uploaded, and the **Comments** field, which can be edited to provide context to the file.

Users should exercise discretion when determining what files to upload. It is not necessary to upload several files that show practically identical images or information. Instead, users should select the image or document to upload that best represents the information they are attempting to convey. Whenever possible, all photographs should be time stamped, and include the date and location of the image. Many cameras can automatically date/time

stamp a photo. For more detailed information and further guidance on taking and documenting photographs, please refer to the OCFS *Child Protective Services Manual*, Chapter 6, Section G.

If a stage association was selected at upload, it will be listed next to the uploaded file in the **My Uploads** tab. Before uploaded files are fully integrated into CONNECTIONS, users must designate a stage association, if one was not previously selected, and must also select a category and subcategory for each file. Once a file has been associated with a stage, and a category and subcategory are selected, users will go to the **Photos/Docs** window and link the file to a person, progress note, allegation or, specific to the FSS stage, the health services tab. It is important to consider the nature of the photo/file, other users who may have access to the photo/file, and to be sensitive and respectful to the privacy of the children and families we serve.

The requirement to select a category and subcategory for each file uploaded is to facilitate the use of the **View All Photos/Docs** window to easily locate uploaded files. The primary categories available are:

Candidacy	CPS	FASP	Independent Living	Police	Vouchers
CARA	Education	Foster/Adoptive	IV-E Documentation	Releases	Other
Correspondence	Essential Documents	Health	Legal	Safety/Risk Assessments	

Each primary category has relevant associated subcategories, and every primary category contains a subcategory of “Other” if a user is unable to determine a more appropriate subcategory for an uploaded file. The categories and subcategories are separate and apart from where an uploaded file may or may not be linked (stage, person, progress note, allegation, or health record).

Selecting the category and subcategory that accurately reflects the file will ensure CONNECTIONS confidentiality rules are followed. Specifically: (1) When linking files to a “Person ID,” the only categories that can be selected are “Essential Documents” and “Independent Living.” The “Person ID” crosses all stages the individual is listed in, which limits the type of information appropriate to link to it because many different types of child welfare workers will be able to access this information. (2) Uploaded child health information in FSS stages must be given the category of “Health” and placed in the health services window. CONNECTIONS will not allow files with the category of “Health” to be placed in other locations within the FSS stage. (3) Information that would directly identify the reporter, source, or collateral contact of a child protective services intake report should be given the category of “CPS” and subcategory “Information from Source of Report” or “Info from Collateral,” and should be linked to a progress note with the “Reporter/Source” denotation selected as that will automatically limit the access of other users and individuals to that progress note and file, thereby maintaining confidentiality.

All files have an attached **Comments** field in which contextual information can be entered when initially uploading the file, when viewing files from the **My Uploads** tab, or from the **Photos/Docs** window. Users should provide additional descriptive information in an uploaded file’s **Comments** field to promote clarity when the file is accessed by other users.

Additional Considerations When Uploading

All files should be uploaded in a timely manner per New York State Regulation18 NYCRR-NY 428.5(a), which states: "Progress notes must be made as contemporaneously as possible with the occurrence of the event or the receipt of the information which is to be recorded."

Once a file has been uploaded to CONNECTIONS, it should be removed from the local device on which it was stored (agency-issued camera, cell phone, computer, etc.) as soon as possible. Individuals shall not use personal devices to take photographs; there are specific requirements for the use of mobile devices as outlined in 17-OCFS-LCM-14. Any photograph taken by LDSS staff, VA staff, or another professional operating in an official capacity, is considered part of the case record and must be kept secure and confidential.

It is never acceptable to upload handwritten notes as a substitution for progress notes in CONNECTIONS. Handwritten letters or documents from a child, client, or other individuals related to the case are acceptable, but should always be associated with a progress note that provides context to the photo or document.

Files shall not be uploaded to NYC Advocates Preventive Services stages.

When case records are being printed from CONNECTIONS for administrative review or other purposes, users should also print any associated uploaded photographs, documents, or other files.

V. Systems Implications

The **Uploads** URL will only be accessible to users who have been given the **FILE UPLOAD** business function. Users who do not have this business function will receive a message that states: "Your CONNECTIONS user account does not have access to this file upload feature."

One of the primary purposes of the **Uploads** function is to support existing documentation requirements directly in CONNECTIONS. An example of using the **Uploads** function to support existing documentation would be uploading a .pdf of a completed form OCFS-3921, *Rapid Indicator Tool*, to support the sex trafficking screening documentation already required by CONNECTIONS. Similarly, form OCFS-2196, the *Plan of Safe Care*, can be uploaded and appropriately categorized after completing the related section in CONNECTIONS.

VI. Additional Information

Inter and intranet hyperlinks to CONNECTIONS Job Aids to support this new functionality are:

https://ocfs.ny.gov/connect/jobaides/Tip%20sheets/Uploading-files-in-CONNECTIONS-Job-Aid-v2.0.pdf

http://ocfs.state.nyenet/connect/jobaides/Tip%20sheets/Uploading-files-in-CONNECTIONS-Job-Aid-v2.0.pdf

Normal record retention rules apply for all files uploaded to CONNECTIONS.

VII. Contacts

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VIII. Effective Date

This new functionality in CONNECTIONS is being piloted in the second half of 2019. Statewide rollout is expected in early 2020.

/s/ Lisa Ghartey Ogundimu, Esq.

Issued by:
Name: Lisa Ghartey Ogundimu, Esq.
Title: Deputy Commissioner
Division/Office: CWCS

Appendix B:
ATTACHMENT A: System Instructions for Youth Ordered to Pre-dispositional Placement in a Foster Care Setting and Post-dispositional Placement Under Article 7

ATTACHMENT A

System Instructions for Youth Ordered to Pre-dispositional Placement in a Foster Care Setting and Post-dispositional Placement Under Article 7

- If the family court judge orders the **pre-dispositional placement** of a youth under Article 7 to a foster care setting:

    - The local department of social services (LDSS) must obtain the pre-dispositional placement order from court at that time.

    - The LDSS must open an FSI in CONNECTIONS and stage progress the FSI to an FSS case. **Do not** select a "Program Choice."

    - The LDSS must use the CONNECTIONS placement module with the **"Exact Resource Search,"** to locate an appropriate pre-dispositional placement for the youth in a foster care setting for which the LDSS has contracted for pre-dispositional placements. The **"Exact Resource Search"** for known resources allows the worker to search for a specific resource by name, resource ID, vendor ID, or address.

      The placement module will prepopulate the activity record (M910) with the placement data collected in the placement module and require a user to verify and save the record in "Activities" (19-OCFS-ADM-17).

    - Once the appropriate pre-dispositional placement is located for the youth, the LDSS arranges for such placement with the foster care setting. A copy of the court order for pre-dispositional placement must accompany the youth to the placement and should be provided to the voluntary agency staff.

    - The LDSS must complete the family "Relationship Matrix" in CONNECTIONS.

    - The LDSS must open a Welfare Management System (WMS) case; however**, no "Purchase of Service" codes shall be entered.** Normal rules apply for individuals who shall be listed on the WMS case.

    - The LDSS must also enter the corresponding "Legal Activity" codes in CONNECTIONS for PINS pre-dispositional placement in a foster care setting. These codes are **L300, 06, 97** (pre-dispositional placement in a foster care setting).

    - If the LDSS has access to the "My Upload" function in CONNECTIONS, the LDSS must upload the pre-dispositional placement court order into CONNECTIONS with the file category of **Legal** and subcategory of **Placement Order**. The file should be kept directly on the stage or attached to a progress note. The original placement order must be maintained by LDSS following all local protocols.

****Please note—** Expenditures for the pre-dispositional youth residing in a foster care setting **must not be authorized** in WMS, paid through the Benefits Issuance Control System

(BICS), or claimed in the Automated Claiming System (ACS). These expenditures shall be processed outside of WMS/BICS and funded with 100 percent local dollars.

- If the youth is absent without leave (AWOL) prior to arriving at the arranged pre-dispositional placement in a foster care setting:
  - the LDSS must indicate in the CONNECTIONS placement module that the "child failed to arrive" to the foster care setting; and
  - the LDSS must still enter the corresponding "Legal Activity" codes in CONNECTIONS **(L300, 06, 97)**.

- If a youth is AWOL during their pre-dispositional placement in a foster care setting, the absence must be recorded in "Activities" in CONNECTIONS **(M950)**. If the youth does not return prior to the scheduled court appearance for the pre-dispositional placement, the court must make a determination as to whether to extend the pre-dispositional placement, within the time limits and scope of the PINS reform legislation.

  - If the court extends the youth's pre-dispositional placement in a foster care setting:
    - a copy of the pre-dispositional placement extension order must be obtained from the court at that time;
    - the corresponding "Legal Activity" code needs to be entered in CONNECTIONS, which is **L300, 06, 98** (pre-dispositional placement extension); and
    - if a warrant is also issued at the time of the pre-dispositional placement extension, and the youth is located by law enforcement, arrangements can be made after hours for that youth to be placed in a foster care setting for pre-dispositional placement, as there is an existing order for such.

  - If the court does not extend the youth's pre-dispositional placement in a foster care setting:
    - the corresponding "Activity" code ending the pre-dispositional placement in a foster care setting needs to be entered in CONNECTIONS **(M990)**; and
    - if a warrant is also issued for the youth at this court date and the youth is located by law enforcement, the youth shall not be brought to a pre-dispositional placement without the court making the necessary findings and order for a new pre-dispositional placement.

- When the youth's pre-dispositional placement in a foster care setting is legally ended, the corresponding "Legal Activity" code must be entered into CONNECTIONS **(M990)**.

- At the disposition of the Article 7 proceeding, if the youth is ordered to **post-dispositional foster care placement**:

  - The LDSS must utilize the CONNECTIONS placement module to locate the most appropriate foster care setting for the youth, which should be consistent with any previous pre-dispositional placement of the youth for continuity of care, unless extenuating circumstances exist. All other placement module rules apply for foster care placement (19-OCFS-ADM-17).

- In the open CONNECTIONS Family Services Stage (FSS), the LDSS must choose the program choice of "Placement," as of the date of the post-dispositional foster care placement of the youth.

- The LDSS must also enter the corresponding "Legal Activity" codes for post-dispositional foster care placement of a youth **(L300, 06, 43)**.

- The LDSS must also follow all WMS "Purchase of Service" (POS) codes for the corresponding post-dispositional foster care placement.

- If the LDSS has access to the "My Upload" function in CONNECTIONS, the LDSS must upload the PINS post-dispositional placement order into CONNECTIONS with the file category of **Legal** and subcategory of **Placement Order**. The file should be kept directly on the stage or attached to a progress note. The original placement order must be maintained by LDSS following all local protocols.

- The LDSS must follow all other systems requirements for foster care cases being mindful, however, of the new time-frame limits for foster care of youth placed on an Article 7 and the triggering of permanency hearings at any request for extension of such foster care placement, as outlined in this ADM.

**** Please note that if the court order for pre-dispositional placement is active through the court order for post-dispositional placement of the youth, the following system rules must be followed**:

- The entering of the M990 "Legal Activity" code ending the pre-dispositional placement must be dated the day prior to the post-dispositional placement "Activity Date."

- If the Case Initiation Date (CID) for the FSS case was based initially on the pre-dispositional placement of the youth and no prior CID existed, the LDSS must go into the "FASP Window" and enter a "Corrected Application Date" to correspond to the post-dispositional placement "Activity Date."