

CONNECTIONS Tip Sheet

FSS Case Closure

Process for Closing an FSS Stage/Case

Only the Case Planner or the Case Manager may submit a Family Services Stage (FSS) for closure. If submitting an FSS/CWS or FSS/CCR for closure, CONNECTIONS determines whether a Plan Amendment with an “ending” or “discharge” type exists for this stage, or if there is a Family Assessment and Services Plan (FASP) for this stage currently in Pending status or approved within the last 30 days. If one of these criteria exists, the system proceeds with the stage closure; otherwise, the Case Manager or Planner must record a narrative before continuing.

If the Case Planner or Case Manager is submitting an FSS/OTI, FSS/COI, FSS/ADVPO or FSS/ICPC stage for closure, the closure can be submitted for approval without any further work or checks by the system.

Note: There is no FASP or Plan Amendment for FSS/OTI, FSS/COI, FSS/ADVPO or FSS/ICPC.

Closing an FSS stage also closes the corresponding case if the FSS is the only open stage in the case, other than an ARI stage.

Note: The case cannot be closed if there is an open FSI, FSS, CPS Intake or CPS Investigation.

Procedure (A): Closing the FSS/CWS or FSS/CCR Stage/Case by Completing a Plan Amendment (*Recommended Method*)

A Plan Amendment may be completed for any approved FASP type (i.e., Initial, Comprehensive or Reassessment) and can be launched even if a FASP is available for launch.

1. On the *FASP* window, click on the drop-down arrow for the **Launch New FASP...** field and select **Plan Amendment** from the resulting list.
2. Click on the **Launch** button.
If a FASP is available for launch and a worker chooses to launch the Plan Amendment, the following message displays, depending on the FASP type available (Comprehensive or Reassessment):

“A FASP is available for launch. Are you closing the Family Services stage?”

 - Click on the **Yes** button in response to the message.
The Plan Amendment displays on the FASP tree.
3. Click on the **Plan Amendment** node on the FASP tree.
*The Plan Amendment Maintenance window displays. “Update Service Plan” displays on the **Selected Status Changes** list.*
4. Highlight the desired status change(s) on the **Status Changes** list with an “ending” or “discharge” type.

5. Click on the >> (Add) button.
*The selected status changes are added to the **Selected Status Changes** list.*
6. If necessary, repeat **Step 5** to add more status changes. Multiple statuses can be selected at once by holding down the **Ctrl** key while clicking with the mouse.
7. Click on the **Save** button when you have added the desired status changes.
The FASP window displays.
8. On the *FASP* window, expand the tree by clicking on the “+” symbol, then click each sub-node under the **Plan Amendment** node from the FASP tree; record and save the necessary information.
9. Click on the **Check FASP Detail** button.
The Check FASP Detail Component Status window displays. If there are any incomplete Plan Amendment components, they display on the window. If all Plan Amendment components are complete, the window is clear.
10. If there are incomplete FASP components, click on the **Close** button and navigate to the component(s) to complete the required information.
*Once you complete the information, return to **Step 9**.*
11. Once all FASP components are complete, click on the **Submit** button.
The following message displays:
“This action will close this window. Do you want to continue?”
12. Click on the **Yes** button.
The To-Do Detail window displays with the approver’s name in the Assigned To field; this field cannot be modified.
13. Click on the **Save** button.
Depending on whether the submitter is a Case Manager or Case Planner, a different message displays, followed by this prompt:
“Do you wish to add another approver?”
14. Click on the **No** button if you do not want to add another approver. Click on the **Yes** button if local policy mandates another approver.
The Assigned Workload displays.
15. Open the *Case Summary* window and select the stage you wish to close from the Stage Information grid.

16. Click on the drop-down arrow for the **Reason Stage Closed** field and select from the resulting list and click on the **Submit** button.

Note: If closing the stage/case due to a finalized adoption, the correct closure reason will not display in this list until the *Finalize Adoption* window has been saved.

17. Click on the **Yes** button in response to the following message:
"Closing this stage will close the case. Do you wish to continue?"
18. Click on the **Yes** button in response to the following message:
"This action will close this window. Do you want to continue?"
The To-Do Detail window displays with the name of the appropriate Approver.
19. Click on the **Save** button.
*Depending on whether the submitter is a Case Manager or Case Planner, a different message displays, followed by this prompt:
"Do you wish to add another approver?"*
20. Click on the **No** button if you do not want to add another approver. Click on the **Yes** button if local policy mandates another approver.
The Assigned Workload displays.

Procedure (B): Closing the FSS/CWS or FSS/CCR Stage/Case without a Completed Plan Amendment

An FSS/CWS or FSS/CCR can be closed without a completed Plan Amendment, although **Procedure A** is the recommended method.

1. From the *Case Summary* window, select the stage you wish to close from the Stage Information grid.
2. Click on the drop-down arrow for the **Reason Stage Closed** field and select from the resulting list.

Note: If closing the stage/case due to a finalized adoption, the correct closure reason will not display in this list until the *Finalize Adoption* window has been saved.

3. Click on the **Submit** button.
*If a Plan Amendment with an "ending" or "discharge" type does not exist for this stage and there is not a FASP for this stage currently in Pending status or that was approved within the last 30 days, the Stage Closure Question window displays with the following message:
"There is no Plan Amendment or Pending FASP for this stage. Closing and/or discharge information is required by regulation. Do you wish to do one now?"*
4. Click on the **No** button.
The narrative field highlights in yellow, indicating that comments are required.

5. Record comments (up to 3,000 characters) in the **Narrative** field. *This required field is used to describe the level of achievement of outcomes essential to the child(ren)'s safety, permanency and well-being.*
6. Click on the **OK** button.
*When closing the FSS would result in closing the case, the following message displays:
"Closing this stage will close the case. Do you wish to continue?"*
7. Click on the **Yes** button.
*The following message displays:
"This action will close this window. Do you want to continue?"*
8. Click on the **Yes** button.
The To-Do Detail window displays with the name of the appropriate Approver.
9. Click on the **Save** button.
*Depending on whether the submitter is a Case Manager or Case Planner, a different message displays, followed by this prompt:
"Do you wish to add another approver?"*
10. Click on the **No** button if you do not want to add another approver. Click **Yes** if local policy mandates another approver.
The Assigned Workload displays.

Procedure (C): Approval Process for Closing Stages/Cases

Once all of the submission criteria are met, an Approval Task To-Do is created. The Case Planner saves this Task To-Do and the FSS stage is submitted to the Case Manager and the Case Planner's Unit Approver for review and approval. The Case Manager and Unit Approver are both notified of the submission by a Task To-Do on the *Staff To-Do List*. The Case Manager can only approve the FSS *after* the Unit Approver (and any other approvers) has completed the approval process.

If the Case Manager is initiating the stage closure, the submission is sent to the Case Manager's Unit Approver.

Once the approval is complete, the following Alert To-Do displays on the Case Planner's *Staff To-Do List*.

"Approval Complete! Events have been frozen."

CONNECTIONS notifies WMS that the FSS stage is closed. Although the WMS codes are updated, the worker must also close the case in WMS separately. The corresponding WMS case can only be closed once the CONNECTIONS case has been closed.

If you need assistance performing any of the functions on this guide, please talk to your supervisor or contact the Help Desk. The Help Desk is staffed 24 hours a day, seven days a week. You can contact the Help Desk at: 1-800-NYS-1323 (1-800-697-1323)