

CONNECTIONS Quick Tip

Using the Placement Module to Modify Activities Data

With the implementation of the Placement Module on October 18, 2019, initial placements or a child's movement from one facility to another (Activity codes M910, M981, M982, M960, M980) must now be documented through the module rather than directly in the Activities window. This also includes documenting (1) any of the above movements that took place prior to the implementation date that were not yet recorded in Activities and (2) changes needed to the sequence of Activities M codes to correct Non-reimbursables (NRs). In these circumstances, an Exact Search can be used because the placement resource is already known.

While this sequence of steps may or may not be completed by the same worker, depending on local procedures, the following business functions are needed to complete the entire process:

PERSON or CASE SEARCH	To locate the open stage of the child for whom documentation is needed
MAINT PLACE	To initiate and complete the placement request
SEARCH PLACE	To conduct an exact search for the resource
RESOURCE COORD	To create a referral for placement, place the child, and verify the placement
PLACE DASH	For access to the Placement Dashboard to verify the placement
MAINT ACTIVITY	To click the Navigate link and save the code in the Activities window

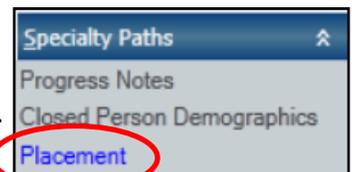
Accessing the Placement Dashboard

- For workers who do not have access to a workload containing the child, the process begins on the Search/Maintain menu with either a Case or a Person Search.

Person Search	Case Search
Select Person from the Search/Maintain menu	Select Case/Stage from the Search/Maintain menu
Use the <i>Identifiers</i> field to select PID or CIN	Enter the CONNECTIONS (not WMS) case number
Enter the child's PID or CIN and click the Search button	Click the Search button
Highlight the resulting person	Highlight the case
Select the <i>Case List</i> tab	Select the <i>Case Summary</i> tab
Select the open case and select the <i>Case Summary</i> tab	Locate and highlight the open FSS stage
Locate and highlight the open FSS stage	

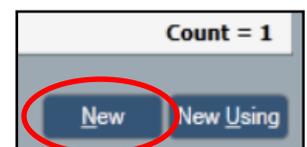
- Click the **Placement** link in the Specialty Paths section of the navigation pane.

The Placement window opens.



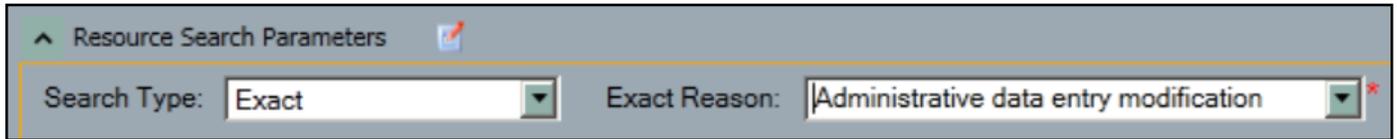
Initiating a Placement Request and Conducting an Exact Search

- Click the **New** button to the lower right of the Placement window to initiate the placement request.
- Use the checkboxes to select the child(ren) needing Activities code entries.



Note: Whenever a pop-up message appears asking if you wish to save, click the Yes button.

5. Enter the Proximity address if required by local protocols. Otherwise, for **BOTH** the Proximity Address and School Address, check the box indicating that the address is not available.
6. Under Resource Search Parameters, select “Exact” as the Search Type.



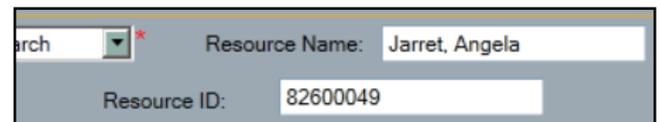
A screenshot of the 'Resource Search Parameters' form. It features a 'Search Type' dropdown menu set to 'Exact' and an 'Exact Reason' dropdown menu set to 'Administrative data entry modification'.

7. Select an Exact Search Reason from the drop-down menu.
8. The Resource Name and Resource ID fields cannot be manually entered.
Click the **Exact Resource Search** link in the navigation pane.



9. Search for the resource by Identifier (Resource ID or Vendor ID) or by using the Resource Name as shown in the FAD stage.

10. Select the resource from the Resource Search List.
When searching by Identifier, there should be only one result.

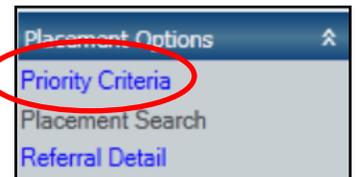


A screenshot of a resource search results form. It shows a search dropdown, a 'Resource Name' field containing 'Jarret, Angela', and a 'Resource ID' field containing '82600049'.

Be sure to select the active foster home and NOT an open subsidy home.

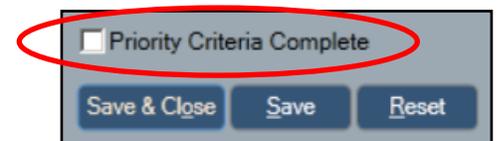
11. Click the **OK** button to populate the Resource Name and Resource ID fields.

12. In the navigation pane, select the **Priority Criteria** link.



13. On the resulting window, check the **box** indicating that Priority Criteria are complete.

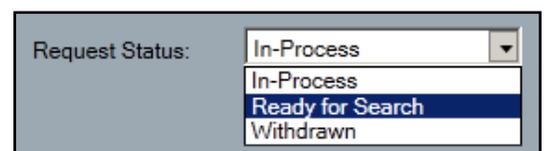
14. Click the **Save & Close** button.



A screenshot of a form with a checkbox labeled 'Priority Criteria Complete' which is circled in red. Below the checkbox are three buttons: 'Save & Close', 'Save', and 'Reset'.

15. Change the **Request Status** from “In-Process” to “Ready for Search.”

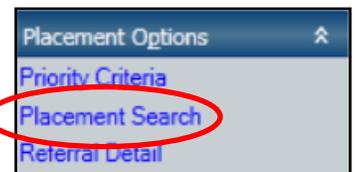
The Placement Search link in the navigation pane enables.



A screenshot of a 'Request Status' dropdown menu. The current selection is 'In-Process'. The dropdown list shows 'In-Process', 'Ready for Search', and 'Withdrawn'. 'Ready for Search' is highlighted.

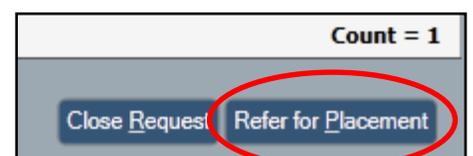
16. Click the **Placement Search** link in the navigation pane.

The placement Resource Search Results window opens and displays a single highlighted result.



17. Click the **Refer for Placement** button.

18. Click the **OK** button on the pop-up message confirming the agency to which the referral is being sent.



A screenshot of a pop-up message showing 'Count = 1' and two buttons: 'Close Request' and 'Refer for Placement'. The 'Refer for Placement' button is circled in red.

19. Close the Search Results window by using the red X.

20. On the main Placement window, click the **Referral Detail** link in the navigation pane.

The Referral Detail window opens with the referral highlighted.

20. Click the **Place Child** link in the navigation pane of the Referral Detail window.

Note: *When an Exact Search is used, you can place the child without a response to the referral.*

21. Select the Placement Action of “Place.”

22. Use the drop-down menus to enter a **Placement Date** (date the child was placed), a **Best Fit Reason** (why this placement was chosen) and the **Resource Name**.

23. Enter a comment, if desired (e.g., “Data Fix” or “Documenting a placement that occurred prior to the placement build”)

24. Scroll down and select the **Activities Placement Type**.

25. Select **Transfer Reason** if entry is for a transfer between placements.

26. Select Out of County Reason, if appropriate.

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

28. Click the **OK** button acknowledging the Placement Request will be closed.

29. Close the Placement window.

30. Open the Placement Dashboard from the **Search/Maintain** menu.

31. Click the **Verify Placements** link in the navigation pane.

32. On the Verify Placements window, select a child. If a sibling group was placed, you will need to verify each child’s placement individually.

33. Use the drop down menu to select “Placement Verified.”

34. Enter the date the child *physically arrived* in the **Actual Placement Date**.
This is the date payments and reimbursements can begin.

35. Click the **Save** button.

36. Open the Activities window from the **Search/Maintain** menu.

37. In the Pending Activity grid, use the **Navigate** link to save the movement in Activities.

