CONNECTIONS

System Build 15
FAD:
Changes Affecting FAD and Related Common Functions

CONNECTIONS
System Build 15 FAD Job Aid

Contents

This job aid is available online:

- In the Public Folders:
  All Public Folders > Statewide > Connections > Build 15

- On the CONNECTIONS Intranet site:
  DFA Intranet Site > OCFS Homepage > Connections > Desk and Job Aids

The CONNECTIONS Intranet site also contains information about CONNECTIONS training.

Note: Any visible identifying data in this job aid is simulated.

New Phone Number for the CONNECTIONS Help Desk

CONNECTIONS Help Desk staff are available to answer basic questions related to your equipment or problems you're having with the CONNECTIONS application. If they cannot solve the problem, they will record your information and forward it to others who can.

When you call the Help Desk with a problem, you will receive a ticket number to use for tracking your issue and its resolution. Keep a record of this number; you will need it for any follow-up conversations with the Help Desk.

The Help Desk is staffed 24 hours a day, seven days a week. The new telephone number is:

1-800-NYS-1323
(1-800-697-1323)

Introduction

This Job Aid provides information about the changes to FAD and Common Functions in CONNECTIONS that are being introduced with Build 15.

Specifically, this Job Aid contains information about:

- Changes to several windows in the FAD dialog.

- Enhancements to streamline the FAD home creation, maintenance and documentation process.

- New system capabilities for modifying the Legal Name of a FAD home.

- Restrictions requiring supervisory approval when a change to resource (FAD home) name or address has been recorded.

- New system capabilities for documenting home closures.

- Modifications to recording capabilities for homes in Emergency status.

- Additional system alerts for home certification/approval extensions and expirations.

- New system capabilities for documenting status and extensions for fingerprint results and medical reports.

- System edits to identify appropriate relationships between Setting and Program Type.

- System edits requiring the recording of person demographic information and required dates for medical and fingerprinting information.

- System edits for the recording and identification of foster parents.

- New system messages for errors in the FAD recording/certification process.

- Changes to F/A Home Search, Resource Search and Person Search.

- New system capabilities for recording the removal of a person from a FAD home.

- Implementation of the new Foster and Adoptive Home Record Summary (FRS). Information regarding the FRS is detailed in the *Foster and Adoptive Record Summary (FRS) Job Aid*. Features of the FRS include:

  ⇒ A comprehensive view of FAD information recorded in CONNECTIONS, including home demographics, person detail and licensing information.

  ⇒ A single, multi-tabbed window that enables workers to access, view and print FAD home information easily. The window is organized to be consistent with the foster/adoptive home development process.

  ⇒ Functionality for recording comments and contact notes at appropriate points throughout the process.

  ⇒ Mechanisms for recording FAD Home Study narratives and Annual Reauthorization narratives. OCFS templates are provided for recording these narratives in the FRS.

$\Rightarrow$ Reduction of duplicate information entry in external notes documents and CONNECTIONS. This results in a more complete, online record for each home and an improvement in the quality of case record documentation for FAD homes.

$\Rightarrow$ An updateable FAD checklist that assists workers in verifying that all tasks necessary for proper certification/approval of FAD homes are completed.

$\Rightarrow$ A Contacts tab, which provides a place for workers to record all contacts made for a FAD home, creating a contemporaneous document of the FAD home development process.

Changes to FAD Windows

In addition to the specific changes detailed in this section, Build 15 includes the addition of appropriate system identifiers (e.g., Stage Name, Resource ID, Case ID) in the title bar on FAD windows.

Task List

The *Task List* guides a FAD worker through the pre-defined activities (based on policy and procedure) for a FAD home.
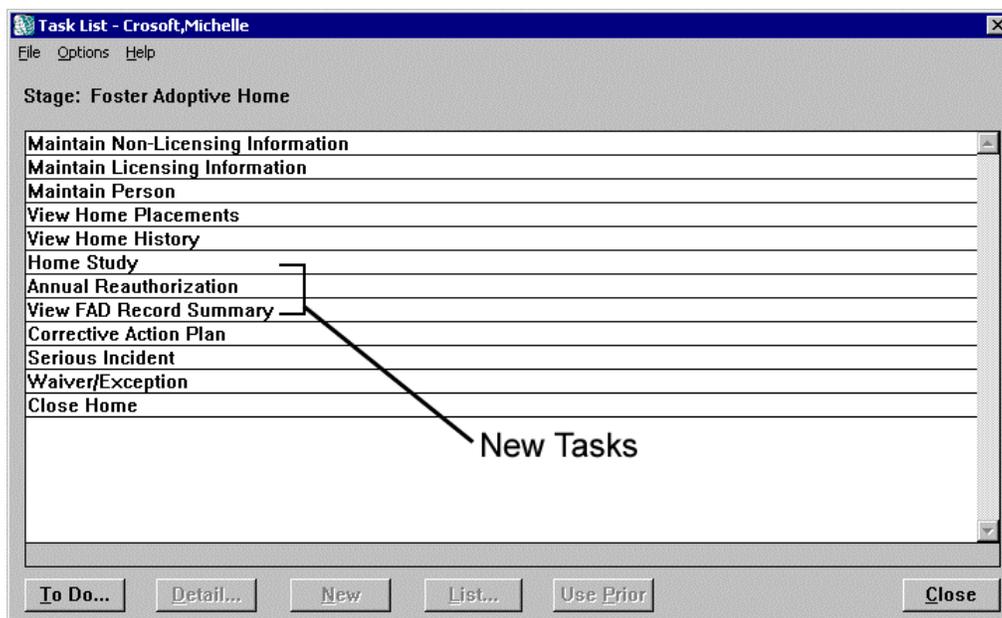
Build 15 includes several changes to the *Task List* for FAD stages:

- Three new tasks have been added to the *Task List*:

  ⇒ **Home Study**
  ⇒ **Annual Reauthorization** (replaces the previous **Authorization** task)
  ⇒ **View FAD Record Summary**

  A fourth new task, **Vacancy Control Bed Maintenance**, will be implemented this summer.

  The **Home Study**, **Annual Reauthorization** and **View FAD Record Summary** tasks navigate directly to the FAD Record Summary (see the *FAD Record Summary Job Aid* for details). The **Vacancy Control Bed Maintenance** task navigates directly to the Vacancy Control application (see the *Vacancy Control Job Aid* [coming Summer 2002] for details).

- When a worker selects the **Maintain Person** task, only the **List…** button enables; the **New** button remains disabled. (Prior to Build 15, both the **New** and **List…** buttons enabled when the task was selected, but clicking either button opened the *Person List* for the selected FAD home.)

- A new button (**Use Prior…**) has been added for use with the **Home Study** and **Annual Reauthorization** tasks. This button opens the FAD Record Summary and retrieves the most recently saved and approved narrative in a "new using" format.

The **Use Prior…** button enables a FAD worker to use the previously recorded Home Study or Annual Reauthorization document as the foundation for a new Home Study or Annual Reauthorization document.

The **Use Prior…** button enables only if the **Home Study** or **Annual Reauthorization** task is selected *and* a previously saved version of the Home Study or Annual Reauthorization document exists, as applicable. The button is disabled if the **Annual Reauthorization** task is selected and the date is *not* within 90 days of the reauthorization due date.

For a home with a previously saved FAD Record Summary, click on the Home Study or Annual Reauthorization task, as appropriate, and click on the **New** button. The following message displays:

 "Option selected will start with new (i.e., blank) narratives instead of the last saved narratives."

The worker clicks on the **Continue** button to retrieve the FAD Record Summary with blank narratives. The **Cancel** button enables the worker to select the **Use Prior…** button to retrieve the most recent previously saved narratives. Guidelines for recording MAPP/GPS and OCFS Standard home study narratives will be available in the near future via the CONNECTIONS Online Help function.

Case (Stage) Name/CD
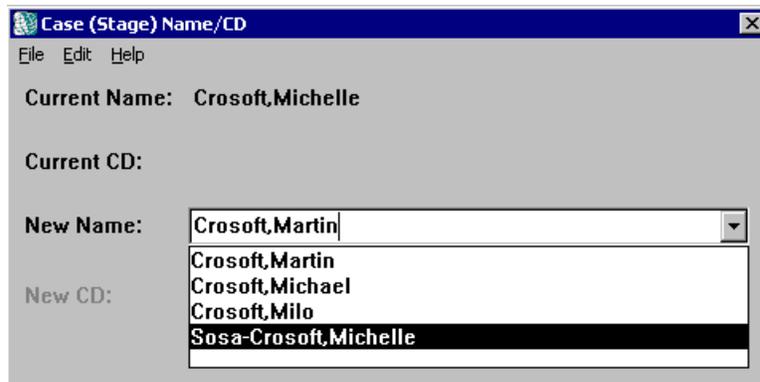
Formerly titled *Change Case Name*, this window has been renamed as *Case (Stage) Name/CD*. It allows an authorized worker to change the name of a FAD home. Whenever the name of a FAD home is changed, the Resource (Home) Name and Legal Name are automatically updated as well. For most FAD homes, the Resource Name and the Legal Name are the same.

New York City addresses are organized into geographical subdivisions called Community Districts (CDs). FAD workers in New York City will see Community District (CD) information in FAD windows that contain a CD field or column. The **CD** field on the *Case (Stage) Name/CD* window is pre-filled with resource address information recorded in CONNECTIONS; the CD cannot be changed on this window.

In order to open the *Case (Stage) Name/CD* window from the *Assigned Workload* and make changes, you must be:

- a Primary or Secondary worker assigned to the home;

- the assigned worker's supervisor; or

- in the assigned worker's Unit hierarchy.

To Access the Case (Stage) Name/CD Window from the Assigned Workload:

1. Select a home from the *Assigned Workload*.

2. Click on the **Options** menu and select the **Case/Stage Name** command.

For homes in Accepted-Active or Emergency status, changes to the *Case (Stage) Name/CD* window must be Saved and Submitted. If you click on the **Save** button (or select the **Save** command from the **File** menu), the following message displays:

"Supervisory approval is required for this action. Select Save and Submit."

When you select the **Save and Submit** command from the **File** menu, the following message displays:

"This change will also update the Resource Legal Name."

A Task To-Do is created for the approver, who navigates to the *Case (Stage) Name/CD* window from the Task To-Do on the *Staff To-Do List*. A new home event is created on the *Event List* when the *Case (Stage) Name/CD* window is Saved (or Saved and Submitted).

When a home's name is changed and submitted for supervisory approval, CONNECTIONS sends an Alert To-Do to the primary worker's *Staff To-Do List*. The text of the To-Do reads:

"Update Home Study/Reauthorization RE: Address/Name change."

If the Legal Name of the FAD home should be different than the new Resource Name, the worker needs to change the Legal Name in the *Home Demographics* window *after the Home Name change is approved by the supervisor* (see page 25 for information about changing the Legal Name of a FAD home in the *Home Demographics* window).

Home Name changes for FAD homes in Accepted-Active or Emergency status must be Saved and Submitted. Homes in any other status must be Saved.

The following message displays when you Save (or Save and Submit) changes to the *Case (Stage) Name/CD* window:

"This change will also update the Resource Legal Name."

If the worker navigates to the *Case (Stage) Name/CD* window when a Home License or Home Closure pending approval event exists, the window can be opened only in View-only mode. The following message displays:

"The home/facility is Pending Approval or Pending Closure. Changes are not allowed."

If the worker navigates to the *Case (Stage) Name/CD* window when a Home Name change is pending approval, the following message displays:

"Saving will invalidate the Pending approval. Continue in Modify mode?"

Clicking on the **No** button opens the *Case (Stage) Name/CD* window in View-only mode. Clicking on the **Yes** button opens the window in Modify mode. Opening the *Case (Stage) Name/CD* window in View-only mode allows workers to view information; Modify mode allows workers to change the Case/Stage/Home name of a home (see the table below for details regarding View-only and Modify mode).

If the supervisor rejects a name change, the home's original name will be restored to the last approved value.

View-only vs. Modify Mode	
View-only Mode	**Modify Mode**
• The **Current Name** and **Current CD** fields are protected (information cannot be changed). • The **New Name** and **New CD** fields are disabled. • The **Save** command (**File** menu) and button are disabled and all fields are protected. • The **Save and Submit** command (**File** menu) is also disabled. • Only the **Cancel** button and the **Exit** command (**File** menu) are enabled.	• The **Current Name** and **Current CD** fields are protected. • The **New Name** field is modifiable. • The **Save** command (**File** menu) and button enable when the **New Name** field is populated with a different name than the **Current Name** field. • The **New CD** field is disabled (CD information cannot be changed in this window). • The **Save and Submit** command (**File** menu) enables only when the stage type is FAD *and* the home is in Accepted-Active or Emergency status *and* the **New Name** field is populated with a different name than that of the **Current Name** field. • The **Cancel** button is enabled.

The table starting on page 10 explains the display variations for the *Case (Stage) Name/CD* window.

Case (Stage) Name/CD Window Display Variations		
Path/ Window	**Display Mode**	**Display Details**
Assigned Workload	View-only or Modify	• The **Current Name** field displays the current case/stage/home name for the selected FAD home and the **Current CD** field displays the current CD for the selected home (NYC only). The Current Name and Current CD fields are always protected. • The **New Name** and **New CD** fields are blank. • If there is a pending Home License or Home Closure for the selected FAD home, the *Case (Stage) Name/CD* window is view-only. • If there is a pending Home Name Change, the following message displays: "Saving will invalidate the Pending approval. Continue in Modify Mode?" If you click on the **No** button, the window displays in View-only mode; if you click on the **Yes** button, the window displays in Modify mode.
Event List	View-only	• The **Current Name** field displays the current case/stage/home name before the Home Name Change was submitted for approval. • The **New Name** field displays the new case/stage/home name that was submitted for approval at the time the Home Name Change event was created. • The **Current CD** field is blank and protected. The **New CD** field is blank and disabled.
"Approve Home Name Change" Task To-Do	View-only	• The **Current Name** field displays the current case/stage/home name before the Home Name Change was submitted for approval. • The **New Name** field displays the new case/stage/home name that was submitted for approval at the time the Home Name Change event was created. • The **Current CD** field is blank and protected. The **New CD** field is blank and disabled.

<table>
<tr>
<td colspan="3" align="center">*Case (Stage) Name/CD* **Window**
Display Variations</td>
</tr>
<tr>
<td align="center">**Path/
Window**</td>
<td align="center">**Display
Mode**</td>
<td align="center">**Display
Details**</td>
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<tr>
<td colspan="3">*Continued from previous page*</td>
</tr>
<tr>
<td>"Rejection Home Name Change"
Task
To-Do</td>
<td align="center">View-only
or
Modify</td>
<td>

The **Current Name** field displays the current case/stage/home name for the selected FAD home.
The **New Name** field displays the case/stage/home name that was rejected after it was submitted for approval.
The **Current CD** field is blank and protected.
The **New CD** field is blank and disabled.
If currently there is a pending Home Name Change, the following message displays:

"Saving will invalidate the Pending approval. Continue in Modify Mode?"

If you click on the **No** button, the window displays in view-only mode; if you click on the **Yes** button, the window displays in Modify mode.

</td>
</tr>
</table>

Case Summary

The *Case Summary* window allows a worker to view summary information for a specific case. The Case Name displays in the title bar to identify the FAD home for which the case summary information applies. Information displayed in this window cannot be modified from within the window itself.

Build 15 changes to the *Case Summary* window include the addition of four new columns:

- **Vendor ID** and **Case ID** columns display at the far right of the window for *FAD stages only*. Use the horizontal scroll bar at the bottom of the window to view these columns.

- A secondary assignment (**SEC**) column displays a check mark if any current or historical secondary workers are assigned to the stage.

- A Community District (**CD**) column has been added for FAD workers in New York City. Workers outside New York City will see the column, but it will be blank.

As has always been the case, the ability to view information in the *Case Summary* window is influenced by a number of factors, including the kind of stage for which information is being accessed and the security attributes assigned to the worker (see "Appendix A" on page 52 for details).

   To Access the Case Summary Window:

   1. *From the Case List:* Select a case on the *Case List*, then click on the **Summary** button (or click on the **Options** menu and select the **Case Summary…** command).

   2. *From the Assigned Workload:* Select a stage on the *Assigned Workload*, then click on the **Options** menu and select the **Case Summary…** command.

   3. *From the Assign window:* Click on the **Options** menu and select the **Case Summary…** command.

Close Home

FAD workers use the *Close Home* window to document the closure of foster or adoptive homes in CONNECTIONS.
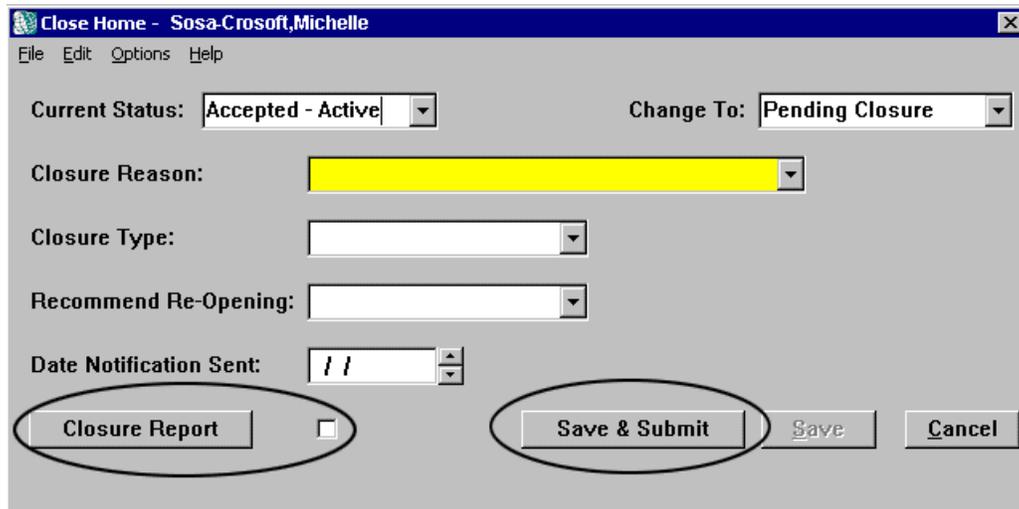
Build 15 includes a FAD Home Closure Report to support regulatory requirements. The report automatically populates some fields with data from the database and provides a narrative for FAD workers to use for documenting home closures. The report is accessed via the new **Closure Report** button on the *Close Home* window (see page 15 for detailed information about the FAD Home Closure Report).

A **Save and Submit** button also has been added to the *Close Home* window. This button (along with the **Save and Submit** command in the **File** menu) is disabled until the Closure Report is accessed.

> ### *To Access the Close Home Window from the Assigned Workload:*
>
> 1. Click on the home to select it from the *Assigned Workload*, then click on the **Tasks…** button to open the *Task List*.
>
> 2. Click on the **Close Home** task, then click on either the **New** button (to record a new home closure event) or the **Detail…** button (to view a previously created home closure event) to open the *Close Home* window.

If the current status of the home is "Pending Acceptance" and the associated licensing approval is pending, the *Close Home* window will not open; the following message displays:

> "A licensing change is pending approval. The home/facility cannot be closed."

Close Home Window Display Variations	
Action	**Window Display**
Submitting a FAD home for closure	The **Current Status** field is protected and populated from the database.
	The **Change To** field is protected. For FAD homes in Inquiry status, the field reads either "Closed" or "Closed — Duplicate;" for homes in any other status, the field reads "Pending Closure."
	The following fields are enabled and blank:
	• **Closure Reason**—The worker must select a closure reason that best summarizes why the authorizing agency is closing the home.
	• **Closure Type**—This field has two choices, "Voluntary" or "Involuntary," to categorize why the foster home is closing. "Involuntary" closure indicates that the authorizing agency is initiating the home closure. "Voluntary" closure indicates that the foster or adoptive parents are initiating the home closure.
	• **Recommend Re-Opening**—This field has two choices, "Recommend" and "Do Not Recommend," to indicate whether the authorizing agency recommends that the home be re-opened at a later date. This information is helpful to future FAD workers who may consider re-opening the home.
	• **Date Notification Sent**—The authorizing agency is required to notify foster or adoptive parents of the intent to close the home at least 20 days prior to closing the home. The worker uses this field to record the date on which the notification was sent.
	The **Closure Report** button is enabled. The **Closure Report** check box is disabled; once the Summary Closure Report has been accessed, an "x" displays in the check box.
Changing a Pending Closure	The **Status** field is protected and reads, "Pending Closure."
	The **Change To** field is protected and populated from the database.
	The following fields are enabled[†] and populated from the database:
	• **Closure Reason** • **Closure Type** • **Recommend Re-Opening** • **Date Notification Sent**
	The **Closure Report** button is enabled; the check box is disabled.

[†] *Provided the worker clicks on the "Yes" button in response to the message, "Saving will invalidate the pending Approval. Continue in Modify mode?" Otherwise, these fields are protected.*

Continued on next page

Close Home Window Display Variations	
Action	**Window Display**
Continued from previous page	
Viewing a FAD Home Submitted Closure Event	The following fields are protected and populated from the database: • **Status** • **Closure Reason** • **Closure Type** • **Recommend Re-Opening** • **Date Notification Sent** The **Closure Report** button is enabled. The Summary Closure Report is frozen and displays in View-only mode.

FAD Home Closure Report

OCFS regulations require detailed documentation regarding the closure of a foster home. Prior to Build 15, this information was documented in the external foster home case record.

Build 15 provides support for documenting this information in CONNECTIONS. The new FAD Home Closure Report includes a narrative in which workers record the reasons for home closure, as well as basic home demographics and the home closure decision. The FAD Home Closure Report includes pre-filled case/facility identifiers to support regulatory requirements and automatically populates some fields with information from the database. The report is accessed via the **Closure Report** button on the *Close Home* window (for more information about the *Close Home* window, see page 13). Once the FAD Home Closure Report has been accessed, an "x" displays in the check box next to the **Closure Report** button.

The FAD Home Closure Report automatically populates fields with information from the CONNECTIONS database each time the report is accessed. When the report is completed, the worker Saves and Submits the report for supervisory approval. Once the report is approved, it is "frozen" and displays in View-only mode. Multiple closure events for a home can be recorded in CONNECTIONS; each closure event has its own closure window.

This **Save and Submit** button (along with the **Save and Submit** command in the **File** menu) on the *Home Closure* window is disabled until the Home Closure Report is accessed.

Workers will continue to receive the following message when they Save and Submit a home closure for supervisory approval:

"Have you completed the Closing Summary Report?"

To Access the FAD Home Closure Report:

1. Select a FAD stage from the *Assigned Workload*, then click on the **Tasks…** button to open the *Task List*.

2. Click on the **Close Home** task, then click on the **New** button to open the *Close Home* window.

3. Record information in the appropriate fields on this window.
   The information will be reflected in the report.

4. Click on the **Closure Report** button to launch the report.

F/A Home History Detail

The *F/A Home History Detail* window is used to maintain historical records of FAD homes. This window is opened from the *F/A Home History* window, using the **History Detail** button.

In order to modify the *F/A Home History Detail* window, the worker must have the "Maintain Historic F/A Home" security attribute.

Only dates and status data about the selected FAD Home record can be modified; all other fields are protected. If the most recent record is selected from the *F/A Home History* window, only the date in the **Authorized From** field can be modified.

To conform with regulatory requirements and to ensure that the certification dates do not exceed one year, Build 15 includes an edit that prevents an F/A Home history record from being modified until the home has progressed to Accepted-Active status at least once.

The **Save** button (as well as the **Save** command from the **File** menu) enables when any change is made to these fields.

When a home's certification is back-dated (i.e., a change is made to the **Authorized From** field on the *F/A Home History Detail* window), the **Authorized To** field is modified accordingly, calculated to the number of days that the **Authorized From** field was changed. This update ensures that the one-year certification period is valid. This change applies only to the first F/A Home History record that is modified. All ensuing F/A Home History records are adjusted accordingly, but F/A Home History records prior to the changed record are not affected.

> ***To Open the F/A Home History Detail Window from the Assigned Workload:***

1. Click on a FAD home on the *Assigned Workload* and click on the **Tasks…** button to open the *Task List*.

2. Select the **View Home History** task and click on the **List…** button to open the *F/A Home History* window.

3. Select a FAD Home history record from the *F/A Home History* window and click on the **History Detail…** button to open the *F/A Home History Detail* window.

F/A Home License

The *F/A Home License* window is used to record or view the licensing and status information for a FAD home. Workers Save and Submit licensing changes for supervisory approval from this window.

The **Home Study** button and check box have been removed, since the new **Home Study** task has been added to the *Task List* as part of the FAD Record Summary (for more information about the FAD Record Summary, see the *FRS Job Aid*).

The former LOC (Level of Care) field has been renamed **Facility Type**.

A system edit has been added to the *F/A Home License* window to ensure a proper relationship between Setting and Program Type, in order to comply with policy requirements. If a selected Program Type does not correspond to the selected Setting, the following error message displays at the bottom of the window:

> "The Program Type selected is invalid for the setting."

The worker must correct this error in order to proceed. The table below lists appropriate Program Type and Setting relationships for FAD homes:

Program Type	Setting	
	Foster Home	**Adoptive**
HIV + / AIDS	●	●
Mother/Child	●	●
Emergency	●	
Refugee Assistance Pgm	●	●
Regular	●	●
Hard to Place	●	●
Supervised Independent Living Program[†]		
Maternity	●	
Diagnostic Reception Center[†]		
Sex Offenders[†]		
Therapeutic	●	
Special Needs Medical	●	●
Special Needs Behavioral	●	●

[†]*These program types are appropriate only for facilities with a Setting of "Congregate."*

Three new check boxes have been added to the *F/A Home License* window. The **Fingerprint Extension** check box has been added to the new Renewal/Extension section (the pre-existing **Reauthorization** check box has been moved into this section) to enable workers to record a 90-day fingerprint extension period for a FAD home (for more information about fingerprint extension periods, see "Home Certification/Approval Extensions" on page 42). The **Medical Dates Complete** and **Fingerprint Results Complete** check boxes have been added in the new Cert./Approval Requirements section and will be system-generated when these two regulatory requirements have been met *if the data has been recorded on the Person Detail FA window.*

When the worker selects **Save and Submit** from the **File** menu, any in-process FAD Record Summary—Home Study event is bundled with the Home License submission. Any in-process FAD Record Summary—Annual Reauthorization event is bundled with the Home License submission *only* if the **Reauthorization** check box is selected on the *F/A Home License* window (for information regarding the FAD Record Summary, see the *FAD Record Summary Job Aid*).

A new home event is generated whenever the *F/A Home License* window is Saved and Submitted. When the worker Saves and Submits the *F/A Home License* window, if the most recent pending home event is either a pending Home Name Change or a pending Home Address Change, the event is *not* invalidated.

When the worker tries to Save and Submit the *F/A Home License* window, the system verifies that the Marital Status, Date of Birth (DOB), Ethnicity, Gender, Religion and Language fields have been recorded on the *Person Detail* window for each principal in the FAD home. If any of this information not recorded, the following error message displays:

> "<Field Name> is required for all persons in the home."

This message is in addition to current system functionality, which verifies that at least one principal is identified as a foster parent in the **Rel/Int** field on the *Person Detail* window; if no principals are recorded with the Relationship/Interest code of "Foster Parent," the following error message displays:

"The home must have at least one foster parent identified."

When multiple error messages are generated, a *Message List* displays with all applicable error messages, rather than individual message windows.
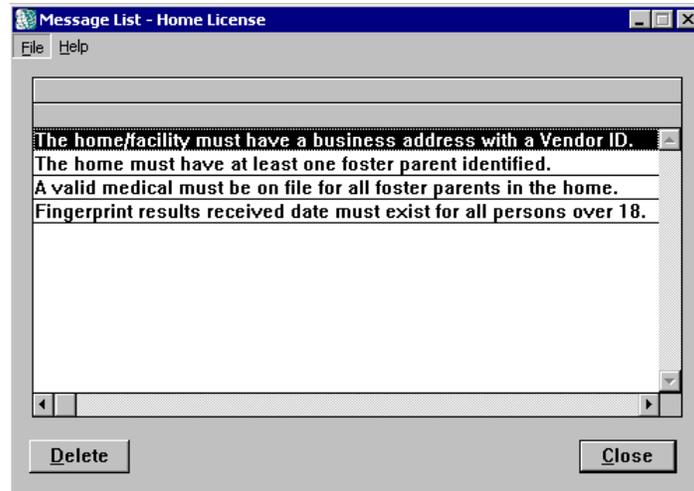
If a secondary worker Saves and Submits the *F/A Home License* window for approval, an Alert To-Do is sent to the *Case To-Do List* and to the primary worker's *Staff To-Do List*. The **Description** column of the To-Do List contains the following text:

"F/A home license sub. for approval by secondary worker - <Resource ID>"

To Access the F/A Home License Window:

1. Select a FAD stage from the *Assigned Workload* and click on the **Tasks…** button to open the *Task List*.

2. Select the **Maintain Licensing Information** task and click on the **Detail…** button to open the *F/A Home License* window.

F/A Home List

The *F/A Home List* displays the results of an F/A Home Search (see page 43 for information about the F/A Home Search function).
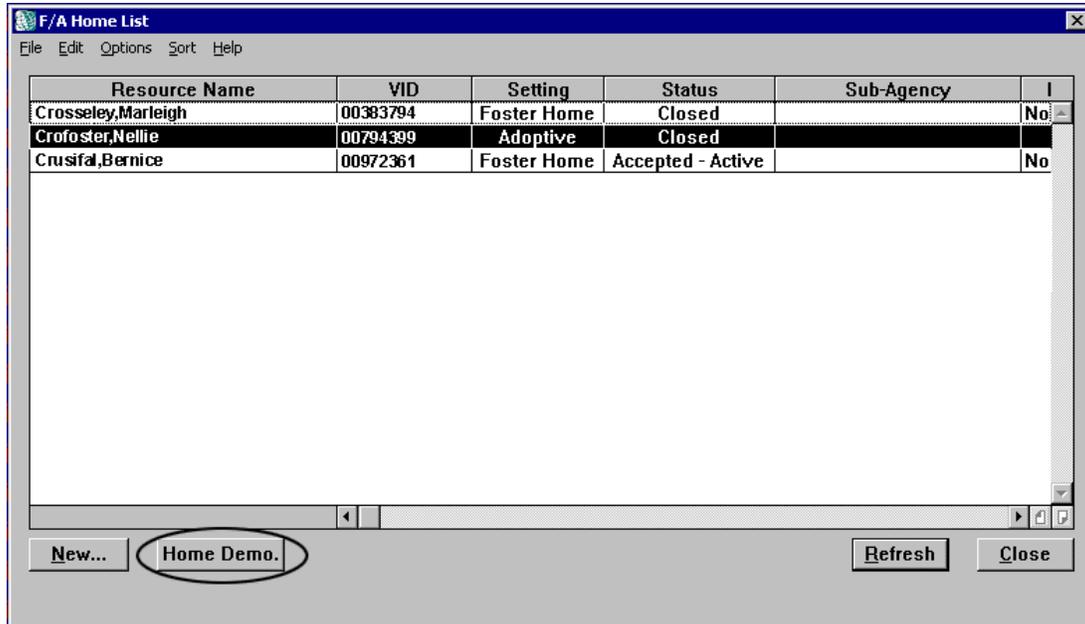
The **Home Demo.** (Demographics) button has been added to the *F/A Home List* to provide access to the *Home Demographics* window for an existing foster home. Prior to Build 15, this window was opened only via the **Home Demographics** command in the **Options** menu on the *F/A Home List*. A home must be selected from the *F/A Home List* in order to enable the **Home Demo.** button.

Conducting an effective search is key to determining if a FAD home already exists in CONNECTIONS. The Build 15 enhancements to the F/A Home Search functionality support this process. If a worker does not enter a home name on the *F/A Home Search* window, the **New** button disables on the resulting *F/A Home List* and the worker is not able to create a new home. This feature helps preserve system data integrity.

The build also incorporates system edits to protect the **Home Name** field on the *Home Demographics* window to preserve system data integrity. When a worker conducts an F/A Home Search and clicks on the **New** button to create a new foster home, the Home Name entered in the search criteria is carried over to the *Home Demographics* window. As a result, the entire foster home name should be entered in the Home Name field when conducting the F/A Home Search (for more information about changes to F/A Home Search, see page 43).

To support federal reporting requirements, the **Ethnicity** field has been modified to display as a combination of Ethnicity and Hispanic or Latino Origin. If more than one origin is recorded, "Hispanic or Latino Origin — Multiple" displays in this column (see page 24 for a list of available Hispanic or Latino origins that can be recorded in CONNECTIONS). The individually selected origins still display on the *Home Demographics* window.

Five new columns have been added to the *F/A Home List*:

Vendor ID A Vendor ID (VID) is a unique eight-digit number that must be recorded for each FAD home in order for the home to receive reimbursement. The VID is recorded as part of the business address in the *Home Demographics* window.

Sub-Agency Specific office sites in New York City (agency code A66) are
(NYC only) classified further into sub-agencies; workers can search and sort FAD homes in CONNECTIONS by sub-agency.

When a foster or adoptive home is created in CONNECTIONS by a New York City ACS worker (agency code A66) or transferred to a primary worker who is from agency A66, CONNECTIONS automatically populates the New York City "800" level sub-agency information in the *F/A Home List*. A foster or adoptive home in New York City can be associated with one of these sub-agencies. This field is always protected.

Foster or adoptive homes that are created outside of New York City, as well as homes that are transferred to a primary worker whose agency code is *not* A66, will not display sub-agency information.

Race If a single racial selection is recorded, that selection displays in this column. If multiple racial selections are recorded, "Multiple" displays in this column (see page 23 for a list of available races that can be recorded in CONNECTIONS).

CD New York City addresses are organized into geographical
(NYC only) subdivisions called Community Districts (CDs). The CD displays as a two-digit code.

This column lists the Community District in which the FAD home (or the household involved in a CPS stage) is located. Information displays in this column only for homes and individuals with New York City addresses.

Case ID The Case ID number is a unique, system-generated, 8-digit number automatically assigned to each case in CONNECTIONS, including FAD homes.

The columns on the *F/A Home List* have been reordered to reduce the amount of scrolling required to see pertinent information. The new order of the columns is:

Resource Name | **Vendor ID** | **Setting** | **Status** | **Sub-Agency** | **Ethnicity** | **Race** | **Addr 1** | **City** | **County** | **State** | **CD** | **ZIP Code** | **Worker Name** | **Worker's Phone Number** | **Worker's Phone Extension** | **Case ID**

To Access the F/A Home List:

1. Click on the **Options** menu on the CONNECTIONS Toolbar and select the **F/A Home** command.

2. Select **F/A Home Search…** from the resulting sub-menu to open the *F/A Home Search* window.

3. Conduct a search (see "F/A Home Search" on page 43 for details on searching for FAD homes). When the search is complete, the *F/A Home List* displays the search results.

Home Demographics

The *Home Demographics* window is used by FAD workers to record, maintain and view demographic information about a FAD home.

The *Home Demographics* window has been changed significantly to help streamline the FAD home recording process. More information is available and modifiable on this window, which reduces the number of associated windows that need to be opened in order to complete FAD recording activities.

The title bar displays the Home Name, Resource ID and Case ID when the window is opened in View-only or Modify mode (when the window is opened in New mode, "New" still displays next to window name in the title bar).

When the *Home Demographics* window is opened by clicking on the **New** button on the *F/A Home List*, the **Home Name**, **Setting**, **Language**, **Address** and **County** fields default to the values entered in the search criteria on the *F/A Home Search* window.

The **Resource ID** field has been removed from the *Home Demographics* window, since this information now displays in the title bar.

The **Source of Inquiry** field has been renamed **Inquiry Source**. The **Marital Status** field has been renamed **Marital**.

New federal standards require that a more accurate representation of race and ethnicity be captured for federal reporting. These standards include the ability to record multiple races for a single person and redefine ethnicity categories previously used in federal reporting. To conform to these new standards, three new fields have been added to the *Home Demographics* window: **Race**, **Ethnicity** and **Hispanic or Latino Origin**.

Implementation of Build 15 includes a data fix that will be run in CONNECTIONS to convert the ethnicity information in existing FAD home records to the new standard. The conversion is detailed in the following table:

Current	Post-Conversion		
	Ethnicity	**Latino Origin**	**Race**
AA African-American	Non-Latino	-	Black or African American
AC African-American/Caucasian	Non-Latino	-	Black or African American
			White
AH African-American/Hispanic	Latino	-	Black or African American
AN Native American/Alaskan Native	Non-Latino	-	American Indian
AP Asian/Pacific Is/Caucasian	Non-Latino	-	Asian
			White
AS Asian/Pacific Is/Oriental	Non-Latino	-	Asian
BO Black/Other	Non-Latino	-	Black or African-American
CW Caucasian (White/Non-Hispanic)	Non-Latino	-	White
HC Hispanic/Caucasian	Latino	-	White
HL Hispanic/Latino/PR	Latino	-	White
HO Hispanic/Oriental	Latino	-	Asian
NA Native African	Non-Latino	-	Black or African American
			Native African
OB Oriental/Black	Non-Latino	-	Asian
			Black or African American
UN Unable to Determine	-	-	Not Reported
XX Unknown	-	-	Not Reported *(Intake stages only)*

The **Race** field contains a list of races and sub-groups that can be recorded in CONNECTIONS. More than one race can be selected from the list. Available races are:

- Black or African American
- Alaskan Native
- American Indian

- Asian
- White

- Native Hawaiian/Pacific Islander
- Multiple

Available race sub-groups that can be recorded in CONNECTIONS are described in the table below:

Race (or Race Sub-Group)	Code
Black or African American	**AA**
Caribbean	AAC
Haitian	AAH
Native African	AAN
Other – Black or African American	AAX
Alaskan Native	**AL**
American Indian	**AM**
Asian	**AS**
Chinese	ASC
Indian	ASI
Japanese	ASJ
Korean	ASK
Other – Asian	ASX
Pacific Islander/Native Hawaiian	**PI**
White	**WH**

Double-click a race to select it from the list. A check mark displays to the left of each selected race. Remember, more than one race can be selected from the list. To deselect a race, double-click it again and the check mark no longer displays.

The **Ethnicity** field contains a drop-down list with two options:

- Hispanic or Latino

- Non-Hispanic or Latino

To select an option, click on the drop-down arrow for the **Ethnicity** field and click to select from the resulting list. Only one option can be selected.

The **Hispanic or Latino Origin** field contains a list of Hispanic or Latino origins that can be recorded in CONNECTIONS. Multiple origins can be selected. Available origins are:

- Central American
- Caribbean
- Cuban

- Dominican
- Mexican
- North American

- Puerto Rican
- South American
- Other

Double-click an origin to select it from the list. A check mark displays to the left of each selected origin. Remember, more than one origin can be selected from the list. To deselect an origin, double-click it again and the check mark no longer displays.

The value in the **Ethnicity** field must be "Hispanic or Latino" in order for the **Hispanic or Latino Origin** field to enable.

The Community District (**CD**) field has been added to the *Home Demographics* window. This field displays a two-digit code based on the address information recorded for the home. Community Districts represent geographical subdivisions within the five boroughs; they display only for New York City addresses.

A **Save and Assign** button has been added to the *Home Demographics* window, providing an alternative to using the **Save and Assign** command from the **File** menu (the command remains in the **File** menu for workers who prefer to use this method). The **Save and Assign** button (and menu command) enable only when the window is in New mode.

For most FAD homes, the Resource (Home) Name is the same as its Legal Name. Sometimes the Legal Name of a FAD Home is different than the Resource Name in the database. The **Legal Name** field has been added to the *F/A Home Demographics* window to enable workers to record a Legal Name that is different from the Resource Name. If the two names are the same, the system defaults the Legal Name to the data in the **Home Name** field when the home is Saved and Assigned.

The Primary Address and Primary Phone group boxes have been added to the *F/A Home Demographics* window to reduce the amount of system navigation required for data entry in the FAD recording process. This information is modifiable only on the *Home Demographics* window. To add other addresses or phone numbers, use the **Address** button (to open the *Resource Address List*) or the **Phone** button (to open the *Resource Phone List*).

A new **Use as Business** check box has been added to enable workers to record the business address (when it is the same as the primary address) without navigating to additional windows. This check box also protects the business address on the *Resource Address Detail* window. This functionality ensures that valid address information is transmitted to BICS for payment purposes.

Build 15 includes a system edit that requires address validation before a worker can Save and Assign (or Save and Submit) the FAD home. Otherwise, the following error message displays:

"The address must be validated before you leave this window."

This feature helps preserve system data integrity by ensuring that all addresses recorded in CONNECTIONS are validated through CODE-1 to comply with US Postal Service address formatting standards.

Required address fields on the *Home Demographics* window are: **Street**, **City**, **State**, **County** and **ZIP Code**. This helps ensure that proper address information is recorded in the system; that address information is sent to BICS for payment purposes.

When a home's primary or business address is changed and submitted for supervisory approval, CONNECTIONS sends an Alert To-Do to the primary worker's *Staff To-Do List*. The text of the To-Do reads:

"Update Home Study/Reauthorization RE: Address/Name change."

The **Home Name** field is protected and defaulted on the *Home Demographics* window for all FAD homes. The field also is protected when maintaining an existing home. Information in protected fields cannot be changed on this window (to correct the home name, see "Case (Stage) Name/CD" on page 7). Protecting this field supports the preservation of system data integrity. Due to this change in CONNECTIONS FAD functionality, the entire foster home name should be entered in the **Home Name** field when conducting the F/A Home Search (for more information about enhancements to F/A Home Search, see page 43).

When a worker Saves and Assigns a new FAD home and clicks on the **Save** button, the **Save** command (**File** menu), the **Cancel** button, or the **Exit** command (**File** menu) in the *Assign* window, *all* windows in the FAD dialog close. This feature improves the efficiency of the recording process by eliminating the need to close each window individually.

Supervisory approval is required when changing the Home Name, Primary Address or Business Address for a FAD home that is in Accepted-Active or Emergency status. If the worker attempts to save such changes under these circumstances by clicking on the **Save** button, the following message displays:

"Supervisor approval is required for this action. Select Save and Submit."

Saving and Submitting generates a Task To-Do for the approver, who navigates directly from the Task To-Do to the *Resource Address Detail* window. An approval event also generates on the *Event List* whenever the *Home Demographics* window is Saved and Submitted.

If the pending approval is rejected, the home event status changes to "REJT." If the pending approval is rejected, the home event status changes to "REJT." When a primary and/or business address has been approved, the primary address of everyone in the home is updated automatically to the primary address of the home, unless a person is found in an open CPS stage. If the supervisor rejects an address change, the home's original address information will be restored to the last approved value.

If a worker navigates to the *Home Demographics* window when a Home License or Home Closure pending approval event exists, the following message displays:

"Saving will invalidate the pending approval. Continue in modify mode?"

Clicking on the **Yes** button opens the window in Modify mode. If the worker changes any of the information on the window and saves the changes, the pending approval event is invalidated and the worker needs to resubmit the approval item to the supervisor. Clicking on the **No** button opens the window in View-only mode.

A system edit on the *Home Demographics* window prevents the worker from leaving the **Vendor ID** field blank when saving information for a home that is in Accepted-Active or Emergency status. This edit ensures that BICS receives a valid Vendor ID for payment purposes.

Resource Address Detail

Prior to Build 15, workers used the *Resource Address Detail* window to record all addresses (primary address and business address) for a FAD home. With the implementation of Build 15, the primary address is recorded directly on the *Home Demographics* window, as is the business address when it is the same as the primary address (see page 22).

When the business address for a FAD home is different than the primary address, the worker records the business address in the *Resource Address Detail* window. When the primary and business addresses are identical, the primary and business address information is protected in this window. When the two addresses are different, the primary address is protected in this window.

The following fields are required when recording a business address in the *Resource Address Detail* window:

- **Street 1**
- **City**

- **State**
- **County**

- **ZIP Code**

Completing these required fields helps ensure that proper address information is recorded for the foster home in CONNECTIONS. This information is used for system-generated certificates and letters and is transmitted to BICS during the nightly batch update.

Resource Phone Detail

The *Resource Phone Detail* window enables workers to record, maintain and view phone number information for a FAD home.

Prior to Build 15, workers used this window to record all phone numbers for a FAD home. With the implementation of Build 15, the primary phone number is recorded directly on the *Home Demographics* window. The *Resource Phone Detail* window is used only for recording additional phone numbers for the FAD home. The primary phone number is modifiable only on the *Home Demographics* window; it is protected on the *Resource Phone Detail* window.

Person Detail

The *Person Detail* window is used to view, update or add information about individuals in FAD homes. It enables workers to add principals to the CONNECTIONS database or relate individuals already in the database to a FAD home.

The **Occupation** and **Living Arrangement** fields have been removed from the *Person Detail* window. If this information was recorded for a person prior to Build 15, it remains in the database.

Three new fields (**Race**, **Ethnicity** and **Hispanic or Latino Origin**) have been added to the *Person Detail* window to support new federal reporting standards for race and ethnicity. These standards include the ability to collect multiple races for a single person and also redefine ethnicity categories previously used in federal reporting.

The implementation of Build 15 includes running a data fix in CONNECTIONS to convert the ethnicity information in existing person records to the new standard. Individuals listed as "Unknown" or "Unable to Determine" in the **Ethnicity** field prior to Build 15 will be converted to "Not Reported" in the new **Race** and **Ethnicity** fields (see the table on page 23 for information regarding the conversion).

The **Race** field contains a list of races that can be recorded in CONNECTIONS. More than one race can be selected from the list (see page 23 for a list of available races). Double-click a race to select it from the list. A check mark displays to the left of each selected race. To deselect a race, double-click it again and the check mark no longer displays.

The **Ethnicity** field contains a drop-down list with two options:

- Hispanic or Latino
- Non-Hispanic or Latino

To select an option, click on the drop-down arrow for the **Ethnicity** field and click on one of the options from the resulting list. Only one option can be selected.

The value in the **Ethnicity** field must be "Hispanic or Latino" in order for the **Hispanic or Latino Origin** field to enable.

The **Hispanic or Latino Origin** field contains a list of Hispanic or Latino origins that can be recorded in CONNECTIONS. Multiple origins can be selected (see page 24 for a list of available origins). Double-click an origin to select it from the list. A check mark displays to the left of each selected origin. To deselect an origin, double-click it again and the check mark no longer displays.

Group boxes for Primary Address and Phone information have been added to the *Person Detail* window to help streamline the FAD recording process, enabling workers to record most of the required person information on one window. The **Address…** and **Phone…** buttons are still enabled so workers can record other addresses and phone numbers for a person. To record information in the *Person Detail FA* window or the *Home Member Training List/Detail* window, workers still need to use the **Options** menu on the *Person List*.

The **Options** menu on the *Person Detail* window has been modified to include six commands previously available only from the **Options** menu on the *Person List* (these commands also remain accessible from the *Person List*):

- **Person Events**
- **Case List**
- **A.K.A. Name List/Detail**
- **Person Identifiers**
- **Address List/Detail**
- **Phone List/Detail**
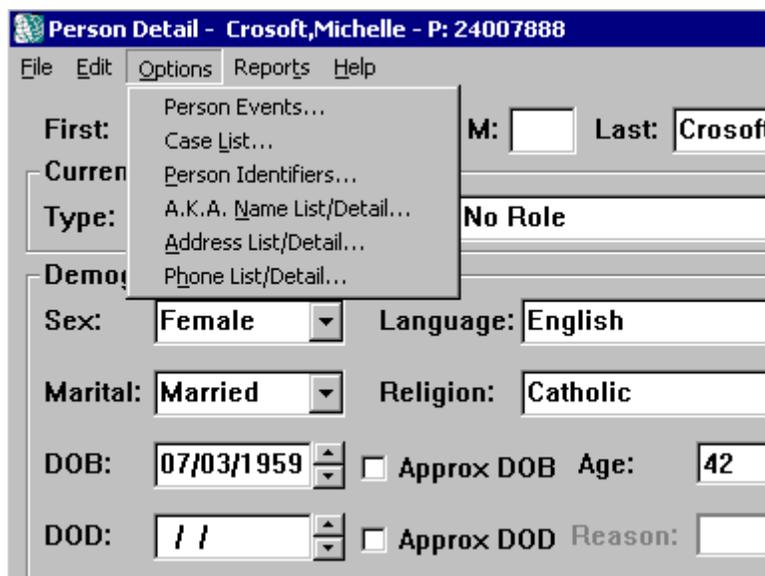
These commands enable workers to navigate to the associated windows without having to return to the *Person List*.

The **Type** field on the *Person Detail* window defaults to PRN (principal) for all new persons added or related to a FAD home.

Prior to Build 15, FAD workers had to maintain address and phone information for a FAD home by navigating to additional windows. Address and phone information for individuals in the home had to be maintained separately and individually.

With the implementation of Build 15, when the primary address or phone for a FAD home is changed in the *Home Demographics* window *and approved*, the primary address and phone information for all principals in the home is updated accordingly, except for persons found in open CPS stages. If the home is in Inquiry or Applicant status, the change is reflected once the change is Saved.

When a FAD home is re-opened, the primary address and phone number for the principals default to those of the home, except for individuals found in an open CPS stage.

When a new person is added to a FAD home, that person's primary address and phone number default to those recorded for the home, unless the person is found in an open CPS stage.

If a person being related to a FAD stage is found in an open CPS stage *and* the person's primary address and phone number are different from those of the home, the following message displays:

> "Addr/Ph does not match Home Addr/Ph. Contact worker(s) of open stage(s)."

The FAD worker needs to contact the worker assigned to the open CPS stage to resolve discrepancies in the primary address/phone.

The implementation of Build 15 includes running a data fix to add and/or update address and phone information for principals who are in open FAD stages but *not* in any open CPS stages.

Build 15 includes a system edit to verify that the **Marital Status**, **DOB**, **Ethnicity**, **Gender**, **Religion** and **Language** fields are recorded for each principal. If any of this information is missing when the worker attempts to Save and Submit the home for supervisory approval, an error message displays.

This change is in addition to the current system edit that ensures at least one principal in the FAD home is identified with a code of "Foster Parent" in the Relationship/Interest (**Rel/Int**) field on the *Person Detail* window. If a foster parent is not identified, the following message displays when the worker tries to Save and Submit the *F/A Home License* window for approval:

> "The home must have at least one foster parent identified."

Additional religions have been added to the drop-down list for the **Religion** field:

• Baptist	• Episcopal	• Hindu
• Methodist	• Mormon	• Buddhist
• Lutheran	• Other Christian	• Other Asian Religion

Changes to Common Functions

Approval Status

The *Approval Status* window enables a supervisor to approve or reject work that has been submitted by a worker. This window also allows workers to view the status of work they have submitted for approval.

Prior to Build 15, workers received an Alert To-Do on the *Staff To-Do List* when a submitted item was rejected by the supervisor, but the Alert did not specify what had been rejected and the worker could not navigate directly from the To-Do to the required window. Workers were required to check the *Approval Status* window to view a rejection and the accompanying supervisory comments.

Build 15 creates a system-generated Task To-Do for rejections. This To-Do displays on the *Staff To-Do List* and *Case To-Do List* once a rejection has been logged by the supervisor. The **Description** column for the To-Do contains the following text:
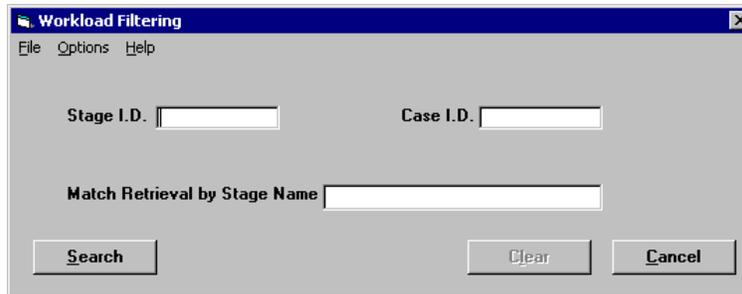
"<Event title> - Rejection logged."

The worker can view the supervisor's comments on the *To-Do Detail* window by selecting the Task To-Do and clicking on the **Detail…** button. The comments display in the **Description/Notes** field. By clicking on the **Navigate…** button on the *To-Do List* for the same To-Do, the worker can navigate directly to the task-related window to correct the required item(s) and resubmit the work for approval.

Assigned Workload

Build 15 includes two significant changes to the *Assigned Workload*:

- A **Refresh** button has been added to bottom of the *Assigned Workload* (previously, workers had to select the **Refresh** command from the **Options** menu on the *Assigned Workload)*. The **Refresh** button returns the display of assignments on the *Assigned Workload* to the default sort and adds any new assignments received since the last time the *Assigned Workload* was opened or refreshed.

- A new command in the **Options** menu, **Workload Filter**, opens the *Assigned Workload (Filtered)* window. This new window enables workers to view a sub-set of assignments from the *Assigned Workload*, which can make it easier for workers to navigate through large workloads. Workers can filter by **Stage ID**, **Case ID** and **Match Retrieved by Stage Name**. A minimum of two characters of the stage name must be entered in the **Match Retrieved by Stage Name** field to enable that particular filter. When the *Assigned Workload* has been filtered, the title bar reads:

Assigned Workload - <worker's name> (Filtered).

To remove the filter, click on the **Refresh** button on the *Assigned Workload*.

Event List

Build 15 adds two new dates for each event on the *Event List* to provide clarification to workers while viewing case events.
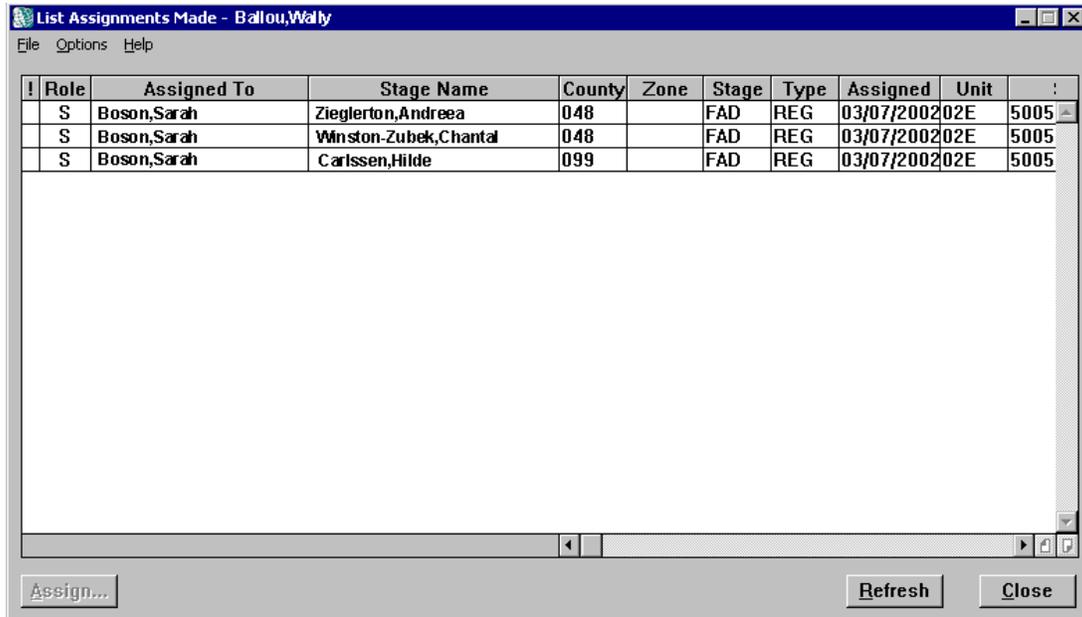
The **Event Date** column displays the date on which an event was completed, as recorded on the specific window or during the event's evaluation. If no date was recorded, the **Event Date** column for that event remains blank.

The **TX Date** column displays the system transaction date, which represents the date an event is updated by a worker using one of the save functions (Save, Save and Stay, Save and Submit, Save and Close) on the specific event's window. For events that are not generated via a save function (e.g., generation of an Approval Letter for an approved relative foster home), the system transaction date corresponds to the date the event was created.

The **Sort** menu includes new commands for sorting the *Event List*, in ascending or descending order, by either of these new dates.

List Assignments Made

The **Options** menu on the *Assigned Workload* contains a new command, **List Assignments Made**, which provides access to the new *List Assignments Made* window. Workers use this window to view assignments they have made to other workers and to retract assignments that were made in error.

The *List Assignments Made* window only displays stages that have not been accessed by the assignee. If all of the stages have been accessed, the following message displays:

"No Assignments to Retrieve. All Assignments Retrieved by Assigned Worker."

An assignment is considered "accessed" when it is selected from the *Assigned Workload* and either an **Options** menu command is selected or the **Tasks…** button is clicked. In order to retract an assignment, the affected stage must not yet have been accessed by the assignee.

To retract an assignment that was made in error:

3. Click on the **Options** menu on the *Assigned Workload* and select the **List Assignments Made** command to open the *List Assignments Made* window.

4. Select the assignment to be retracted and click on the **Assign** button to open the *Assign* window.

5. Reassign the stage to the correct worker by selecting the appropriate staff person's name from the Available Staff list at the top of the *Assign* window and clicking on the **Primary** or **Secondary** button, as applicable.

6. Click on the **Save** button.

When the retraction is completed successfully, the stage is removed from the original assignee's *Assigned Workload*. The original assignee and his/her supervisor receive an Alert To-Do on the *Staff To-Do List*:

"Stage #### was reassigned by <worker name>."

Streamlining of the FAD Home Recording and Maintenance Process

Reduced Window Navigation

Many windows in the FAD dialog have been modified to enable the recording of more information in a window, reducing the need to navigate to other windows to complete the recording process.

Build 15 also closes every window in the FAD dialog when the worker Saves and Assigns a new FAD home.

Reduced Duplicative Data Entry

When the primary address or phone number for a FAD home is changed in the *Home Demographics* window *and approved*, CONNECTIONS automatically updates the primary address and phone number for all principals in the home, except for persons found in open CPS stages. If the home is in Inquiry or Applicant status, the update is reflected once the change is Saved.

When a FAD home is reopened, the primary address and phone number for the principals defaults to those of the home, except for individuals found in an open CPS stage.

When a new person is added to a FAD home, that person's primary address and phone number default to those recorded for the home, unless the person is found in an open CPS stage. If a person being added to a FAD stage is found in an open CPS stage *and* the person's primary address and phone number are different from those of the home, the following message displays:

"Address/Phone does not match Home Address/Phone"

The FAD worker then needs to contact the assigned CPS caseworker to resolve address or phone discrepancies.

FAD Record Summary (FRS)

The FAD Record Summary (FRS) provides a comprehensive view of all recorded information for a FAD home in one convenient place. A single, multi-tabbed window enables workers to access, view and print FAD home information easily. The window is organized to be consistent with the foster/adoptive home development process.

The FRS also provides the ability for authorized workers to record Home Study and Annual Reauthorization narratives directly in the FRS, as well as comments and contact notes. The FRS includes an updateable FAD checklist to assist workers in verifying that all tasks necessary for proper certification/approval of FAD homes are completed.

The FRS reduces the duplicative entry of casework information in external documents and CONNECTIONS. This results in a more complete online record for each home and an improvement in the quality of case record documentation for FAD homes.

For more information about the FRS, see the *Foster and Adoptive Home Record Summary (FRS) Job Aid*.

Removing a Person from a FAD Stage

Prior to Build 15, when a worker wanted to record that a person was no longer living in a FAD home, the worker would end-date that person's primary address on the *Address List/Detail* window. The person would still display on the *Person List* for the home. This procedure was necessary to preserve an accurate historical record of the person in the home.

Build 15 incorporates two new commands (**Remove Person – Left Home** and **Remove Person – Added in Error**) in the **Options** menu of the *Person List* to record this information, which preserves an accurate history of the FAD home and the individual in CONNECTIONS.
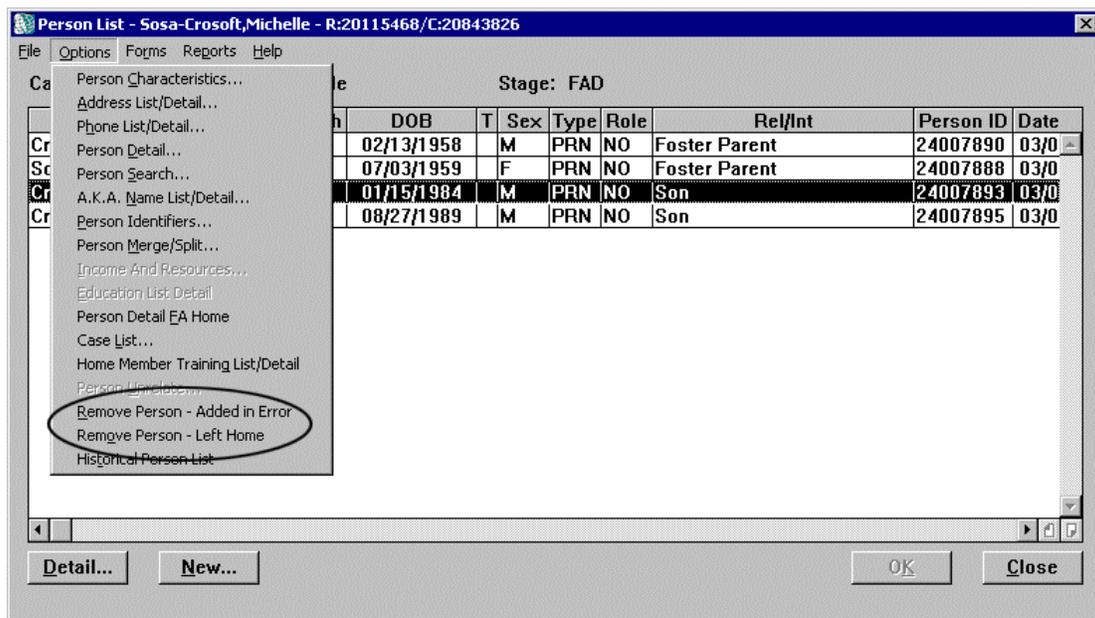
The **Remove Person – Left Home** function removes an individual from a FAD home, but keeps the person's record in the database and preserves an historical record of that individual in the home. The **Remove Person – Added in Error** function removes an individual from the home, but does *not* provide an historical record of the individual's involvement with the home. Individuals who are removed via the **Remove Person – Added in Error** functionality are purged from the database after 90 days, if they are not associated with any other cases.

When an historical record exists for a principal in a FAD home, the following message displays on the *Person List*:

"Historical records exist."

Remove Person – Left Home

The **Remove Person – Left Home** function enables a worker to record that an individual left a FAD home, removing that individual from the *Person List* while preserving the historical record of that person in the FAD home. Home history reports and historical foster home certificates will include individuals who were living in the FAD home, as applicable.

To Remove a Person Who Has Left a Foster Home:

1. Select the affected FAD home/stage from the *Assigned Workload* and click on the **Tasks…** button to open the *Task List.*

2. Click on the **Maintain Person** task and click on the **List…** button to open the *Person List*.

3. Click on the name of the person to be removed from the home.

4. Click on the **Options** menu and select the **Remove Person – Left Home** command. The following message displays:

    "Are you sure you want to Remove Person – Left Home?"

4. Click on the **Yes** button to remove the person from the FAD stage. Click on the **No** button to cancel the Remove Person – Left Home function.

Remove Person – Added in Error

The **Remove Person – Added in Error** function enables a worker to remove an individual who was added or related to a FAD home/stage in error. When the worker completes the Remove Person – Added in Error function, the misrelated person is removed from the FAD home/stage and the individual does not retain an historical association with the FAD home. A Remove Person – Added in Error event is created and includes an event description indicating the Person ID (PID) that was removed from the stage:

"<PID> was removed from stage."

The following Alert To-Do also is generated to all workers who are assigned to an open stage involving the removed person:

"<Name> (<PID>) was removed from <Stage Name> (<Stage ID>)."

The step-by-step procedure for removing a person who was added in error is similar to the instructions for "Remove Person – Left Home" on page 36, but the worker selects the **Remove Person – Added in Error** command from the **Options** menu in Step 4. In order to perform this function, the worker must have the new "Remove Person – Added in Error" security attribute. In addition, the worker must:

- have an assigned role in the FAD stage, or

- be in the primary worker's unit hierarchy.

In order to maintain accurate data for the person, the worker is responsible for making necessary demographic changes prior to performing the Remove Person – Added in Error function. If changes have been made to person information since the person was related, the following message displays:

"Changes made to person in this stage should be reset before continuing.

For example, if the person's age information was changed from 45 to 35 years after being added to the stage, the age must be corrected to reflect the original information before the individual can be removed from the stage.

If no changes have been made *or* if demographic information has been reset *or* if the person was *added* (not *related*) to the stage, the following message displays:

"Are you sure you want to Remove Person – Added in Error?"

Person Merge and Person Split

In your work with CONNECTIONS, you may encounter multiple records for the same person, or records for two separate persons that have been accidentally combined into one.

Duplicate records can be created if a worker misses a potential match during a Person Search; the worker adds the new person record, rather than relating an existing person record in the system. The opposite situation—accidentally combined records—can result if a worker merges records for two individuals who *seem* to be the same person, but actually are not.

In order to maintain data integrity and prevent problems with accurate case management, duplicate and accidentally combined person records are corrected in CONNECTIONS with the Person Merge and Person Split functions. A Person Merge joins two separate Person IDs into the same record; a Person Split separates person records that were merged in error.

> The individual responsible for merging and splitting is subject to local agency policy and procedure. This task may not fall under the scope of the individual caseworker's responsibilities.
>
> *A specific Business Function Profile will now be required in order to perform a merge or split.*

Build 15 includes several enhancements to the Person Merge and Person Split functions. In addition to the *Person Merge/Split* window, these changes also are reflected in other windows. The **M** column on the *Person List* has been changed to **M/S**. This column continues to indicate that a person has been involved in a merge or split. A new column in the *Case Composition* window, **M/S**, has been added to indicate when a person has been involved in a merge or split.

Once a merge has been completed, the Person Closed no longer displays on the *Case Composition* window.

Person Merge

With the implementation of Build 15, once a person merge is completed, the Person Forward (the person who is carried *forward* to further stages) replaces the Person Closed (the person who is merged) in all non-intake stages (open and closed) and events.

Another enhancement introduced with Build 15 is the creation of the *Person Forward Selection* window. This new window enables workers to select specific person information to be applied to the Person Forward.

Clicking on the **Merge** button on the *Person/Merge Split* window opens the *Person Forward Selection* window.

The following information displays on the *Person Forward Selection* window for both the Person Forward and the Person Closed:

- Full Primary Name
- Sex
- Ethnicity
- Race
- Marital Status
- DOB (including Approximate indicator)
- DOD (including reason and Approximate indicator)
- Primary Address
- Primary Phone

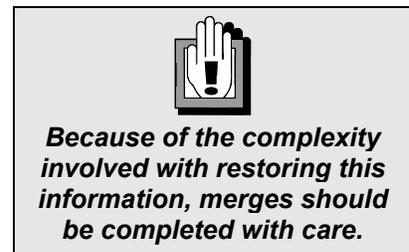Information can be selected from either person by clicking on the corresponding radio button. The information retained for the Person Forward is determined by the type of information selected and the person from whom that information is selected.

If a worker selects information (e.g., Name) from the Person Forward, the primary information for the Person Closed is end-dated and copied to the Person Forward.

If the worker selects information from the Person Closed, the primary information for the Person Forward is end-dated and the information from the Person Closed is copied as the primary record.

Some information is not part of the selection process on the *Person Forward Selection* window. For example, starting with Build 15, information regarding a person's Occupation and Living Arrangement will no longer be recorded. The **Occupation** and **Living Arrangement** fields have been removed from the *Person Detail* window. However, if this information was recorded for a person prior to Build 15, it will still be maintained in the database. When a Person Merge is complete, the Person Forward's information is retained for Occupation and Living Arrangement. This information also displays in the Person Data Report.

Valid Person Identifiers, Person Detail FA Home, Language and Religion information also are retained from the Person Forward, unless the field is blank. If the Person Forward does not have this information recorded, the information from the Person Closed is copied to the Person Forward.

> *Because of the complexity involved with restoring this information, merges should be completed with care.*

Person Split

A Person Split is performed when the records for two separate persons were accidentally merged into one. Performing a Person Split reinstates the Person Closed to the database, but does *not* return the Person Closed to his or her original stages, events or allegations. The records for these individuals must be restored carefully for each stage and event.

After a Person Split is performed, the information for the Person Closed can be accessed through the *Person Detail* window when conducting a Person Search. Person Detail information that existed for the Person Closed prior to the merge is restored. The worker must update all demographic information and "return" the Person Closed to all appropriate stages and events. The worker can use the **Maintain Person** task to restore the Person Closed to open stages. If the stage is closed, the worker can request a data fix through the Help Desk or use Local Data Maintenance when it is available in the future. The worker also must remove the Person Forward by performing the Remove Person – Added in Error function (see page 36 for details about this function).

As part of the implementation of Build 15, an initial data fix will be run to update information in the database. This data fix will be run only once and will update the Person Closed with the Person Forward for all non-Intake closed stages and events for Person Merges that occurred prior to Build 15.

A second data fix will be run only when requested by a worker. This second data fix returns the Person Forward to all appropriate stages and events that existed prior to the merge.

Historical Information

Historical Person List

Build 15 introduces the new *Historical Person List*, which displays all individuals removed from a specific FAD home because they left the home. In order for these individuals to display on the *Historical Person List*, the worker must use the **Remove Person – Left Home** function (see

page 36). Individuals who were removed from a FAD home because they were Added in Error (**Remove Person – Added in Error** function) do not display on the *Historical Person List*.

With the implementation of Build 15, the **Options** menu on the *Person List* includes a new **Historical Person List** command, which opens the *Historical Person List*. This new window displays all of the individuals removed from a specific FAD stage, including the date on which each person was removed. The "View FAD" security attribute is required to enable this command.

If a person is involved in a *merge*, the *Historical Person List* displays the Person Forward information; if the person is involved in a *split*, the original name displays with the original information prior to the merge.

Case List

The introduction of the Remove Person – Left Home function affects the information that displays on the *Case List* when a person is removed from a FAD home via this function.

The *Case List* enables the worker to view a list of cases which either meet the search criteria entered in the *Case Search* window or are associated with a person searched for using the Person Search function. The *Case List* displays high-level case information, such as the Case name, Case ID, the local district or voluntary agency responsible for the FAD home and the primary worker assigned to the most recent open stage of the case.

Prior to Build 15, the *Case List* did not indicate whether an individual was associated with a FAD case. Only current and historical CPS cases and current FAD cases displayed. Build 15 modifies the *Case List* to display historical case involvement for the person on whom the search was conducted.

When the *Case List* is opened via the *Person Search* window, the *Person List* or the *Person Detail* window, the historical FAD cases are shaded in gray and the following message displays if the person is no longer in the FAD home:

"Shaded rows represent historical involvement in FAD stages."

To Access the Case List from the Person Search Window:

1. Access the *Person Search* window:

   ⇒ *Local districts only:* Click on the **PERS** button on the CONNECTIONS Toolbar.

   OR

   ⇒ *Local districts and voluntary agencies:* Click on a FAD home from the *Assigned Workload* and click on the **Tasks…** button to open the *Task List*. Select the **Maintain Person** task and click on the **List…** button to open the *Person List*. Click on the **New** button on the *Person List* to open the *Person Search* window.

2. Enter search criteria and click on the **Search** button. Search results display in the Person Search List in the lower half of the *Person Search* window.

3. Click on a name to select it from the Person Search List.

4. Click on the **Options** menu and select the **Case List…** command.

To Access the Case List from the Person List:

1. Click on a FAD home from the *Assigned Workload* and click on the **Tasks…** button to open the *Task List*.

2. Select the **Maintain Person** task and click on the **List…** button to open the *Person List*.

3. Click on the **Options** menu and select the **Case List…** command.

To Access the Case List from the Person Detail Window:

1. Click on a FAD home on the *Assigned Workload* and click on the **Tasks…** button to open the *Task List*.

2. Select the **Maintain Person** task and click on the **List…** button to open the *Person List*.

3. Select a person from the *Person List* and click on the **Detail…** button to open the *Person Detail* window.

4. Click on the **View Options** menu on the *Person Detail* window and select **View Case List…** to open the *Case List.*

Effects of Historical Persons on Foster Home Certificates and Approval Letters

The **Remove Person – Left Home** function described in the previous section affects the historical record of a FAD home, including certificates and approval letters.

When an individual is removed from a FAD home with the **Remove Person – Left Home** function, the historical certificate or approval letter retains that person's name in a "frozen" historical document. This helps ensure that the historical home certificate or approval letter reflects accurate information for the historical period represented by that document.

Certificates and approval letters generated after an individual has been removed from the FAD home via the **Remove Person – Left Home** function do not show the person as a member of the foster home.

Changes for FAD Homes in Emergency Status

Prior to Build 15, a foster home could be progressed to a status of "Emergency" for a maximum of 60 days. To support regulatory requirements, Build 15 increases Emergency status to 90 days and includes a system edit to ensure that a home being progressed to Emergency status has a Facility Type of "Certified Foster Home" or "Approved Relative Foster Home."

Once a home has been fully certified (progressed to Accepted-Active status), it cannot revert to Emergency status; the home must be closed and re-opened in order for it to enter Emergency status again.

Prior to Build 15, when an Emergency home progressed to Accepted-Active status, the date in the **Authorized From** field reflected the end of the 60-day Emergency status period, regardless of when the progression was approved by the supervisor. With the implementation of Build 15, when a home progresses from Emergency status to Accepted-Active status, the date in the **Authorized From** field reflects the date of the supervisory approval. The date in the **Authorized To** field is one year after the date in the **Authorized From** field.

Home Certification/Approval Extensions

Build 15 enables FAD workers to record 90-day Fingerprint extension periods in CONNECTIONS when *all* regulatory requirements for home certification or approval have been met and the only item outstanding is the receipt of the fingerprinting results. Extension periods are recorded on the *F/A Home License* window (see page 17).

A home in Accepted-Active status may be recertified or reapproved for four (4) 90-day periods while fingerprinting results are pending. Since this involves extending the certification of a home that has already been progressed to Accepted-Active status, IV-E reimbursement is not affected.

A home in Emergency status may be extended for three (3) 90-day periods for a "year" (360 days) total. Homes in Emergency status are *not* IV-E reimbursable.

Regulatory requirements and the status of the foster home determine the ability to record these extension periods in CONNECTIONS:

Home Status	
Emergency	**Accepted-Active**
• Limit of three 90-day extensions.	• Limit of four 90-day extensions.
• Valid medical must be on file.	• Valid medical must be on file.
	• Fingerprint extensions are allowed only if the **Date Card Sent** field on the *Person Detail FA* window has been recorded for all principals age 18 and older.
• Each time the Emergency period is extended, the **Authorized To** date increases by 90 days; the **Authorized From** date is unchanged.	• When the first extension is requested, the new **Authorized From** date will be set to the current **Authorized To** date; the new **Authorized To** date will be 90 days from the new **Authorized From** date.
• Fingerprint extensions are allowed only if the **Date Card Sent** field on the *Person Detail FA* window has been recorded for all principals age 18 and older *and* the **Date Results Received** field is empty for at least one principal.	• When the second or third extension is requested, the **Authorized From** date is unchanged; the **Authorized To** date is increased by 90 days.
• The fingerprint extension period can't be extended more than 30 days prior to the **Authorized To** date.	• If a home is in an extension period and the worker attempts to reauthorize the home for one year, the **Authorized From** date is unchanged; the **Authorized To** date will be one (1) year from the **Authorized From** date.

Changes to Search Functionality

F/A Home Search

The *F/A Home Search* window enables workers to search for FAD homes in CONNECTIONS. The system performs the search (based on the criteria entered) and displays all FAD homes that match the search criteria in the *F/A Home List* (for more information about the *F/A Home List*, see page 20).

The F/A Home Search function searches exclusively for foster homes in CONNECTIONS, regardless of home status (unless the worker enters search criteria in the **Status** field). This differs from the Resource Search function, which searches the entire Resource Directory based on the search criteria entered in the *Resource Search Criteria* window.

Due to the legal implications involved with searching for FAD homes based on ethnicity (and the change in federal definitions and recording standards), the **Ethnicity** field has been removed from the *F/A Home Search* window.

A new **Search Type** field has been added to the *F/A Home Search* window. This field contains a drop-down list with three search options:

Phonetic Name *(default)*	Returns results that *sound like* the criteria entered in the **Home Name** field.
	All of the fields are enabled, but search criteria must be entered in the **Home Name** field to initiate a Phonetic Name search. If search criteria are entered in any of the Identifier fields (**Resource ID**, **Case ID** or **Vendor ID**), all other fields disable and the search type changes automatically to Exact.

Phonetic Address Returns results that *sound like* the information entered in the Address section (the **Street 1** field is required to enable a Phonetic Address search).

When the Phonetic Address search type is selected, all non-address fields disable. All address fields are enabled, but search criteria must be entered in the **Street 1** field to initiate a Phonetic Address Search.

NOTE:
See the tip box on page 46 and the table on page 46
for details about using the Phonetic Address search type.

Exact Returns results that match the search criteria *character for character and space for space*.

When this search type is selected, all fields enable once the pre-filled Agency code is cleared, but the search is not initiated until search criteria are entered in one of the required fields:

- **Resource ID**
- **Case ID**
- **Vendor ID**

- **Agency ID**
- **Home Name**
- **Street 1**

- **City**
- **County**
- **NYC Sub-Agency**

If search criteria are entered in one of the identifier fields (**Resource ID**, **Case ID** or **Vendor ID**), all other fields disable and the Exact search uses only the entered identifier in the search. If search criteria are entered in a *non*-identifier field, the identifier fields disable and are not considered in the search.

All F/A Home Search results return based on the search type and search criteria entered, regardless of the search type. There is no pre-set limit on search results.

Prior to Build 15, address searches were exact and only returned results that matched the search criteria *character for character and space for space*. Build 15 introduces a new, more effective method of searching for addresses in CONNECTIONS. A new search type, **Phonetic Address**, increases the pool of potential matches by including search results based on partial address information. The Phonetic Address search type also affects how results are scored and displayed, the way data is identified and the manner in which you enter search criteria (see the table and tip box on page 46 for details).

When a worker selects the Phonetic Address search type, the **Street 1** field highlights in yellow, indicating that it is a required field. All non-address fields (e.g., **First Name**, **DOB**) disable.

CONNECTIONS creates a pool of candidates (search results) by comparing the phonetic similarity of the search criteria entered in the **Street 1** field with the information in the **Street 1** field of an address recorded in the database. All other address search criteria (e.g., **City**) are used to score the candidates. The closer the **Street 1** candidate information is to the **Street 1** search criteria, the higher the candidate's score will be.

Search Results: Scoring vs. Filtering		
Result	**Description**	**Search Type(s)**
Scoring	Phonetic searches are "scored" by any and all additional search criteria that are entered. Scoring ranks candidates in the pool of results depending on how close they are to the search criteria.	Phonetic Name Phonetic Address *(see tip box at right)*
Filtering	Exact searches are "filtered" by any and all additional search criteria entered. Filtering eliminates candidates from the pool of results.	Exact Phonetic Address *(see tip box at right)*

Other address fields can be used in conjunction with the **Street 1** field to affect the ranking of the search results. For example, if the worker enters search criteria in the **City** field, addresses that match the **Street 1** field *and* the **City** field receive a higher score in the search results than those which match the **Street 1** field but do *not* match the **City**.

If the worker includes the number with the street name (e.g., "10 Willow"), all matches with that number and street name will return on the result list. In some instances, a number or street name that is phonetically similar to the search criteria will also return in the search results.

The table on the following page provides examples of possible Phonetic Address search results.

Phonetic Address searches may be scored *and* filtered, depending on the search criteria.

Entering search criteria in additional address fields *scores* the search results. The closer a result is to *all* of the search criteria, the higher its score.

Entering additional information in the **Street 1** field *filters* the search results. For example, entering "Willow" in the **Street 1** field— *without a house number or suffix* (e.g., "Avenue")—returns all results with Willow (or street names similar to Willow) in the **Street 1** field.

In this example, addresses across New York State that match the **Street 1** field would return higher on the list of results. Addresses containing street numbers or a suffix (as well as street names that are phonetically similar to the street name in the search criteria) will display lower on the list.

It is advisable to conduct a Phonetic Address search using only the street name (without a house number or suffix) in the **Street 1** field. This reduces the likelihood of filtering out a valid match.

A Phonetic Address Search using the following criteria:		Produces the following results:
Street 1	**City**	
Willow	Apple City	• Willow, Apple City • Willow, Beachville • Willow, Chippertown • 5 Willow, Apple City • 5 Willow, Beachville • 63 Willow, Beachville The results in this example would continue with all matches that are phonetically similar to the **Street 1** search criteria.
5 Willow	Apple City	• 5 Willow, Apple City • 5 Willow, Beachville • 5 Willson, Beachville • 5 Willout, Chippertown The results in this example would all have "5" in the **Street 1** field. House number greatly influences the search results.

Build 15 also enables workers to use CODE-1 address validation for information entered in the Address section of the *F/A Home Search* window. CODE-1 formats the address to comply with US Postal Service standards. This feature enables workers to search using address search criteria that comply with the standard for address information recorded in the database. This results in a greater likelihood of finding and returning address matches. **Since they should intentionally be broad, Phonetic Address searches should *not* be validated via CODE-1.**

To Perform a Phonetic Address Search (F/A Home Search):

1. Click on the drop-down arrow for the **Search Type** field on the *F/A Home Search* window and select **Phonetic Address** from the resulting list.

2. Enter the street name in the **Street 1** field.

3. Enter other known information in the remaining address fields (e.g., **City**, **County**).

4. Click on the **Search** button.

Search results display on the *F/A Home List*. If no records match the search criteria, the following message displays at the bottom of the *F/A Home List:*

> "The criteria entered results in no information being returned."

Resource Search

The *Resource Search Criteria* window enables workers to search for resources in the CONNECTIONS Resource Directory, often referred to as the "Yellow Pages of CONNECTIONS." Several changes have been made to the Resource Search function to enable workers to search for resources more effectively.

The following nine (9) fields are enabled when the *Resource Search Criteria* window is opened:

- **Search Type**
- **Resource Type**
- **Resource ID**
- **Resource Name**
- **Inactive** check box
- **Case ID**
- **Agency ID**
- **Transportation** check box *(not used)*
- **Vendor ID**

All other fields enable or disable depending on the criteria entered in these nine fields.

A new **Search Type** field has been added to the *Resource Search Criteria* window. This field contains a drop-down list with three search options:

Phonetic Name *(default)*	Returns results that *sound like* the information entered in the **Resource Name** field.
Phonetic Address	Returns results that *sound like* the information entered in the Address section (the **Street 1** field is required to enable a Phonetic Address search). See the tip box and table on page 46 for more information about Phonetic Address search.
Exact/Directory	Returns results that *exactly* match the search criteria.

CONNECTIONS returns all results that match the search type and search criteria, regardless of which search type is selected. There is no pre-set limit on the number of results that return (see page 46 for detailed information regarding search results).

Build 15 also includes capability for using CODE-1 address validation for FAD home addresses entered in the *Resource Search Criteria* window. CODE-1 formats the address to comply with US Postal Service standards. This feature enables workers to search using address search criteria that comply with the standard for address information recorded in the database. This results in a greater likelihood of finding and returning address matches.

To Perform a Phonetic Address Search (Resource Search):

1. Click on the drop-down arrow for the **Search Type** field on the *Resource Search Criteria* window and select **Phonetic Address** from the resulting list.

2. Enter the street name in the **Street 1** field.

3. Enter other known information in the remaining address fields (e.g., **City**, **County**).

4. Click on the **Search** button.

Search results display on the *Resource List*. If no records match the search criteria, the following message displays instead of the *Resource List:*

"No matches were found for these search parameters."

The *Resource List* displays resources in CONNECTIONS that match the information entered in the *Resource Search Criteria* window. Build 15 reorders the columns in the *Resource List* to reduce the need for scrolling to view pertinent information. The new column order is as follows:

Resource Name | Vendor ID | Facility Type/LOC | Status | Authorized By | Maintainer | Sub-Agency | Street 1 | City | County | Community District | Phone | Extension | Rsrc Type | Resource ID | Agency ID | FAD Facility | Last Update By | Case ID | District/Voluntary Agency | Contracted

Person Search

Prior to Build 15, address criteria were considered exactly in Person Search—results displayed only if they matched the address criteria *character for character and space for space*.

Build 15 adds Phonetic Address search capability to the Person Search function. Phonetic Address search increases searching capabilities by allowing reasonably accurate matching on partially correct address information.

The **Search Type** field in the *Person Search* window now contains three options in its drop-down list:

- Phonetic Name
- Phonetic Address
- Exact

Person Search defaults to the Phonetic Name search type.

This change affects the manner in which person search results are scored and displayed, the way data is identified and the way workers enter search criteria. Phonetic Address search displays results at the top of the Person Search List that most closely match the search criteria, followed by less similar matches (see the tip box on page 46 and the table on page 46 for more information about the Phonetic Address search function).

Fields that are required to enable a particular type of Person Search are highlighted in yellow, while fields that are unavailable for a selected search type are disabled.

To Perform a Phonetic Address Search (Person Search):

1. Click on the drop-down arrow for the **Search Type** field on the *Person Search* window and select **Phonetic Address** from the resulting list.

2. Enter the street name in the **Street 1** field.

3. Enter other known information in the remaining address fields (e.g., **City**, **County**).

4. Click on the **Search** button.

Search results display on the Person Search List at the bottom of the *Person Search* window and the Person Search List title bar displays the following message:

"Phonetic Address Results Returned."

If no records match the search criteria, the following message displays in the Person Search List title bar:

"No Results Returned."

The **Match** column on the Person Search List displays "ADDR," indicating that a Phonetic Address search was performed.

>
>
> Be sure to review the entire list of search results for possible matches. Street addresses (e.g., Willow, 5 Willow, 18 Willow) from the same city will *not* score the same and may display lower in the list of results. Use the scroll bar to proceed through the list.
>
> When the (page up/page down) buttons enable, there are more results on the list. Click on the page up/page down button, as applicable, to view the remaining search results.

Local Data Maintenance

Additional enhancements to the CONNECTIONS system are scheduled for implementation in the summer of 2002, including the introduction of the *Local Data Maintenance* (LDM) window. This single, multi-tabbed window enables workers to view and update person demographic information for closed FAD homes. For example, a person's demographic information might have been recorded incorrectly or may need to be revised. Presently, updating information for a closed FAD Home requires re-opening the home and navigating through a series of windows to make the necessary changes.

A new security attribute, "Maintain Closed Person Demographics," will provide access to Local Data Maintenance functions for FAD homes.

New System-Generated To-Do's

To-Do Type (A=Alert; T=Task)	Description
A	To the primary worker when a secondary worker Saves and Submits the *Home Demographics* or *Case (Stage) Name/CD* window for approval.
A	To the Unit Approver if a worker Saves and Submits an item to anyone other than the Unit Approver.
A	To the primary worker when s/he Saves and Submits a home name or address change for approval.
A	To the primary worker when a submitted name and/or address change is approved.
A	To the primary worker when Saving and Submitting name or address changes; informs the worker that these changes require the completion of a Home Study update.
A	To the primary worker when a FAD Record Summary event is approved; reminds the worker to print a copy of the F/A Home Certificate or Approval Letter for the foster parents.
T	To the primary worker when a submitted name and/or address change is rejected.
T	To the supervisor when the *Case (Stage) Name/CD* window is Saved and Submitted.
T	To the supervisor when the Home Name, Primary Address or Business Address is changed in the *Home Demographics* window and the window is Saved and Submitted.

Updates to Online Help

Build 15 continues the development of the CONNECTIONS Online Help system. Online Help has been updated to reflect enhancements made to the CONNECTIONS system as a result of Build 15. These enhancements include new and modified windows and fields, as well as changes to casework recording guidelines.

Appendix A:
Security Attributes and Case Summary Information

The ability to view information in the *Case Summary* window is influenced by a number of factors, including the kind of stage for which information is being accessed and the security attributes assigned to the worker.

To view…	A worker must have this security attribute…	Without the required security attribute…
Details of a FAD stage	Maintain FAD	The **Summary…** button (as well as the **Summary…** command in the **Options** menu) disables and the worker is not able to open the *Case Summary* window.
Information for an *unfounded* CPS investigation	View Unfounded	The *Case Summary* window displays, but unfounded investigation information does not display on the window.
Details in an *indicated* CPS investigation	View Indicated	Indicated Investigations (and their associated Intake stages) display on the *Case Summary* window, but the worker is not able to navigate to any of the details of the Investigation stage(s) or the associated Intake stage(s).
Details in an *open* CPS investigation	View Under Investigation	Open Investigations (and their associated Intake stages) display on the *Case Summary* window, but the worker is not able to navigate to any of the details of the Investigation stage(s) or the associated Intake stage(s).
Details in an ARI (Administrative Review) stage	View Admin Review	The *Case Summary* window opens, but the worker is not able to view any details (e.g., *Person List*, *Event List*).
Case Summary window from the *Case List* for a sensitive case	View Sensitive	The **Summary…** button (as well as the **Summary…** command in the **Options** menu) disables and the worker is not able to open the *Case Summary* window.