

CONNECTIONS

System Build 15

FAD:

The Foster and Adoptive Home Record Summary (FRS)



CONNECTIONS Training Project
SUNY Training Strategies Group

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CONNECTIONS
System Build 15

Foster / Adoptive Home Record Summary (FRS) Job Aid

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This job aid is available online:

- The Public Folders:

All Public Folders > Statewide > Connections > Build 15

- 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: New Phone Number for the Help Desk

The 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 your problem, they will record your information and forward it to others who can.

When you call the Help Desk with a problem, you will be given 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:

1-800-697-1323

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

I - Introduction

CONNECTIONS provides a tool for workers to manage information related to their work with children, families, and Foster/Adoptive homes and to save it for future reference. This documentation facilitates the management of caseloads and provides an historical record of information about each case.

In addition to using CONNECTIONS to manage and access caseload information, workers need to be able to use the CONNECTIONS system to record case notes and narratives in an organized manner that promotes quality casework practice. This ability will not only aid the worker in his/her casework, it will also aid supervisors and managers in their review and approval of cases.

The Foster and Adoptive Home Record Summary (FRS) provides a comprehensive view of FAD information that has been recorded in CONNECTIONS, including home demographics, person detail and licensing information. A single, multi-tabbed window allows workers to access, view, and print FAD home information easily. The window is organized to be consistent with the existing foster/adoptive home development process. The FRS allows workers to record comments and contact notes at appropriate points throughout this process.

Note: Although the FRS allows you to view case information conveniently, not all of the information you see in the FRS can be updated through the FRS. Much of the information presented in the FRS is drawn from other CONNECTIONS windows and can only be updated in those windows. However, most tabs (**Home Demographics, Licensing Information, Household Member Detail, Home Study Narrative, Annual Reauthorization Narrative, FAD Checklist, and Contacts**) do allow for the recording of various types of comments and notes and, in the case of the **Home Study** and **Annual Reauthorization** tabs, creation and editing of narratives directly within the FRS.

Note: Home Study narratives that existed prior to Build 15 will be converted and available for reference through the *Event List*. They will be labeled, "Converted Pre Build 15 Home Study." Reauthorization narratives will continue to be available through the event list as they have always been. These narratives can be copied and pasted into the FRS Home Study Narrative and Annual Reauthorization Narrative using the methods described in the Copy and Paste Guidelines on page 49. If the Pre Build 15 Home Study narrative was in process, but not submitted to the supervisor at the time of the conversion, it will be necessary to copy this information into the FRS Narrative. If the former narrative is in Pending-Approval status, it will be brought over and included at the end of the FRS Narrative.

Features of the FRS include:

- Mechanisms for recording FAD Home Study narratives and Annual Reauthorization narratives. These procedures replace the current Home Study and Reauthorization procedures.

Using the FRS to create these narratives eliminates the need for duplicate entry of information into external notes documents and CONNECTIONS. This will result

in a more complete, on-line record for each home and an improvement in the quality of case record documentation for FAD homes.

It is important to realize that each time a new Home Study or Reauthorization is initiated a new FRS is created, but only one active FRS will exist at any particular time. The result is that more than one FRS will exist in CONNECTIONS for a particular home.

- OCFS templates will be provided for recording these narratives.

A major advantage of the new Home Study template is the elimination of the freezing of Section 1 of the Home Study document the first time the Home Study is approved by a supervisor. This would prevent any updating of the home's demographic information in this section. The introduction of the FRS with its new Home Study template provides the ability to update home demographic information in the narrative as needed.

Note: When talking about the narrative documents, it is important to understand the difference between a template and a document. Think of the **template** as an empty "form." To create a narrative, you open the template and enter information into the form to create a **document**. You then save the document. The blank template does not change.

- The FAD checklist - This updateable checklist will assist in verifying that all tasks necessary for proper certification and authorization of Foster and Adoptive homes have been completed.
- The Contacts tab – This provides a place for workers to record all contacts made for a home, creating a contemporaneous document.
- Supervisors can use the FRS to review home information, Home Study and Reauthorization narratives, and contacts notes.
- One noticeable benefit for you, the worker, is the ability to view important and useful information in one place without having to navigate through multiple windows in CONNECTIONS.

II - Accessing the FRS

The FRS can be accessed in two ways, through the *Task List* and through the *Event List*.

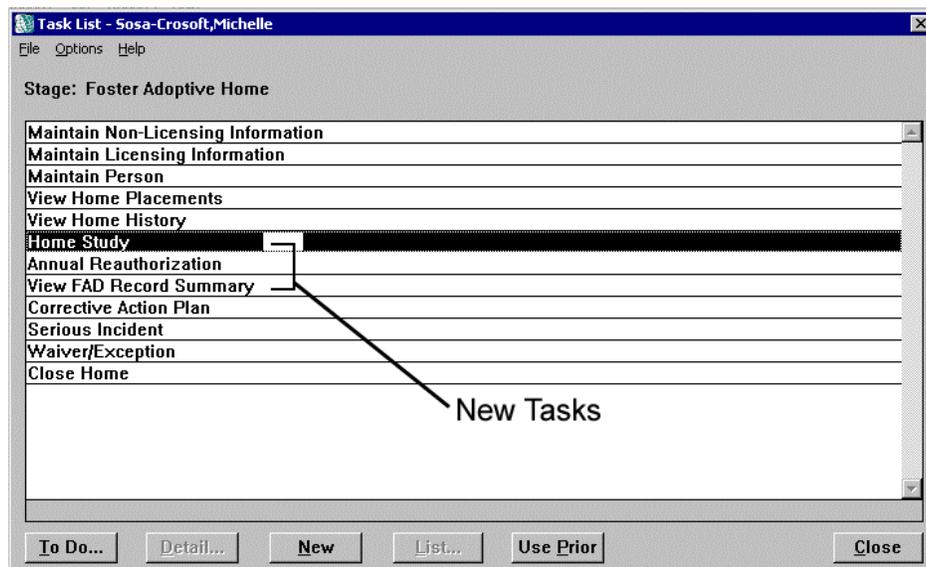
Security for the FRS

Any worker who can access a FAD Home from their workload can access the FRS via the **Home Study**, **Annual Reauthorization** or **View FAD Record Summary** tasks on the *Task List*.

Workers (with the proper FAD security) from the agency that authorizes and approves the home will have access to in-process or historical (frozen) FRS information.

Accessing the FRS from the *Task List*

1. In the *Assigned Workload* window, select a FAD home and click the **Tasks** button to open the *Task List*.
2. The FAD *Task List* contains three new tasks:



- a. **Home Study** - This task provides access for viewing and updating information for the home and the ability to create and update Home Study narratives.
- b. **Annual Reauthorization** – This task provides access for viewing and updating information for the home and the ability to update Home Study narratives and complete the Annual Reauthorization process. It replaces the Reauthorization task that previously appeared on the FAD *Task List*. (This task is only available during the 90 days prior to the home’s certification or approval due date.)
- c. **View FAD Record Summary** – This task provides view-only access to information and any existing Home Study or Annual Reauthorization narratives for the home.

Note: Which buttons on the *Task List* window are used to open the FRS will depend on the specific task to be accomplished and the circumstances in which the FRS is

being accessed. These factors are explained in “The FAD Recording Process Using the FRS” on page 34.

Accessing the Home Study and Annual Reauthorization from the *Event List*

Home Study and Annual Reauthorization narratives create navigable events that appear in the *Event List*.

Event Date	TX Date	Status	Type	Description
03/06/2002	03/06/2002	COMP	Approval	WM - \$\$\$Approve Home Name Change - 21672945
03/06/2002	03/06/2002	APRV	Stage	Case,Stage,Home Name Change: Crosoft,Michelle to Sosa-C
03/06/2002	03/06/2002	COMP	Approval	WM - Approve Bundled FRS / Home License - 21672945
03/06/2002	03/06/2002	APRV	Home	Changed home status to Approved- Active.
03/06/2002	03/06/2002	APRV	Home	Changed home status to Pending Acceptance & maintained li
03/06/2002	03/06/2002	COMP	Home	Non-Licensing Change Made
03/06/2002	03/06/2002	APRV	Home	Home Study
03/06/2002	03/06/2002	COMP	Home	Changed home status to Applicant & maintained licensing inf
03/06/2002	03/06/2002	COMP	Assignment	Secondary Assignment Issued For: Boson, Sarah of Cnty/Agy
03/06/2002	03/06/2002	COMP	Home	New Home Created

The **Status** column for the Home Study and Annual Reauthorization events will display one of four states: PROC, PEND, APRV, and REJT. Conditions for changes in the Status of Events are covered in “Events Created by the FRS” on page 47.

Events with a status of PROC, PEND, or REJT allow view-only access to the FRS.

Events with a status of APRV allow access to frozen/approved Home Study or Reauthorization documents.

After clicking on the event to select it, clicking on the **Detail** button will open the FRS in view-only mode.

III – The Layout of the FRS

For the purposes of this explanation, think of the FRS window as being organized into three sections. The Heading and Button sections contain elements that are present no matter which section of the FRS is being used. The Tabs are the sections that make up the main body of the FRS and are described in detail below.

1 – The Heading

The heading is always present when the FRS is open. It includes the following information: Resource Name, Resource ID, Authorized From Date, Authorized To Date, Vendor ID, and Agency Name/Resource ID.

2 – The Buttons

The buttons are always present when the FRS is open. The following buttons appear at the bottom of the *FRS* window:

Submit: This button initiates the Save and Submit process. Clicking it opens the *F/A Home License* window, allowing workers to Save and Submit the FRS and the Home license information together.

This button will be disabled if the FRS has been entered in view-only mode or if no information has been saved to the FRS.

Help on Narratives: Clicking on this button allows you to access help information on how to use the Home Study and Annual Reauthorization documents. If you click on the **Help on Narratives** button while on the Home Study or Annual Reauthorization tabs, you will open help information about that document. (Clicking on the button while on any other tab will open an index of help topics relating to these narratives.)

This separate help is made available to provide information on completing the narrative documents. [If you click on *Help* on the menu bar of the Word narrative document, you will be accessing Help for Microsoft Word rather than Help on how to use the Home Study or Annual Reauthorization documents.]

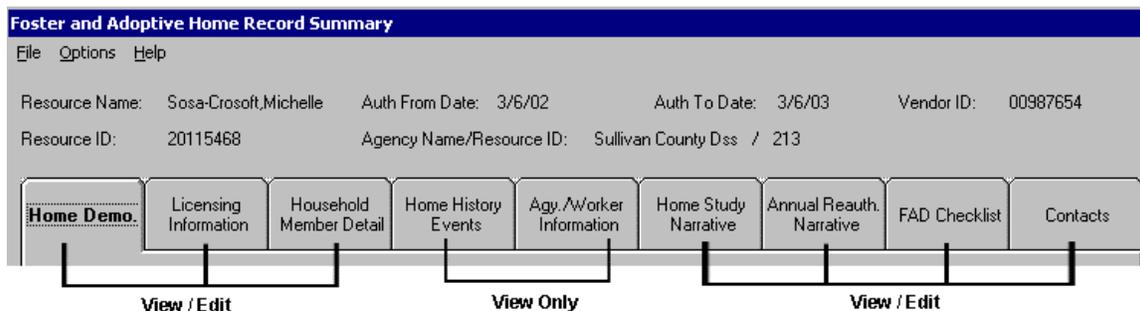
- To learn about the Help information available for the rest of the FRS, see “FRS Online Help” on page 31.

Generate Report: Clicking on this button will open the *Generate Report* window. This window allows you to choose any or all of the FRS tabs to be formatted into a single document that can be printed. Details of the *Generate Report* window are described in “Printing the FRS” on page 33.

Close: Clicking on this button will close the FRS and return you to the window from which you entered the FRS, either the *Task List* window or the *Event List* window.

3 - The Tabs

3a – Overview



The information contained in the FRS is organized into sections, which are represented by file tabs on the FRS window. Appearing from left to right, these tabs are labeled:

1. Home Demographics (abbreviated as “Home Demo.”)
2. Licensing Information
3. Household Member Detail
4. Home History Events

5. Agency/Worker Information (abbreviated as “Agy./Worker Information”)
6. Home Study Narrative
7. Annual Reauthorization Narrative (abbreviated as “Annual Reauth. Narrative”)
8. FAD Checklist
9. Contacts

The information in any of the tabs can be accessed by clicking directly on that tab in the FRS window. Tabs can be accessed in any order.

As described in the sections that follow, the **Home History Events** and **Agency/Worker Information** tabs only display information that has been recorded in other CONNECTIONS windows. You cannot update this information while in the FRS. To update this information, you must click on the **Close** button on the FRS, which returns you to the *Task List* or *Event List* window.

While the remaining tabs (**Home Demographics, Licensing Information, Household Member Detail, Home Study Narrative, Annual Reauthorization Narrative, FAD Checklist, and Contacts**) also display information that must be updated in other CONNECTIONS windows, these tabs also allow the recording of various types of information, comments, and notes and, in the case of the **Home Study** and **Annual Reauthorization** tabs, creation and editing of narratives directly within the FRS.

Note: The FRS contains information drawn from several other windows in CONNECTIONS (*Home Demographics, F/A Home License, Person Detail*). These windows have undergone changes as a result of B15. For details on modifications to these windows, see the Build 15 FAD Job Aid.

Information entered in the FRS will be stored in the CONNECTIONS database. When you reenter the FRS, it will be “refreshed” with the most current information from the CONNECTIONS database. This information can be reviewed and, if necessary, updated further.

3b – Home Demographics Tab

Foster and Adoptive Home Record Summary

File Options Help

Resource Name: Sosa-Crosoft,Michelle Auth From Date: 3/6/02 Auth To Date: 3/6/03 Vendor ID: 00987654
 Resource ID: 20115468 Agency Name/Resource ID: Sullivan County Dss / 213

Home Demo. Licensing Information Household Member Detail Home History Events Agy./Worker Information Home Study Narrative Annual Reauth. Narrative FAD Checklist Contacts

Home Name: Sosa-Crosoft,Michelle Setting: Foster Home Religion: Catholic
 Legal Name: Sosa-Crosoft,Michelle Status: Accepted - Active Ethnicity/Ethnic Origin: Hispanic or Latino Domini
 Auth. Agency: Sullivan County Dss Source of Inquiry: Church Race: Black or African American
 Sub. Agency: Marital Status: Married
 Respite: Not Accepted Language: Multiple

Addr Type	Street	City	County	State	Zip	Sch	Phn Type	Telephone
Primary	123 MEANINE RD	MONTICELLO	SULLIVAN	NY	12777-9001		Primary	(914) 111-1111 ext.
Business	123 MEANINE RD	MONTICELLO	SULLIVAN	NY	12777-9001			

Resource Lien Filed Emergency Back-up Directions to the Home

Submit Help on Narratives Generate Report Close

The **Home Demographics** tab will be the active tab whenever the FRS is entered via the **Home Study** or **View FAD Record Summary** tasks in the *Task List*.

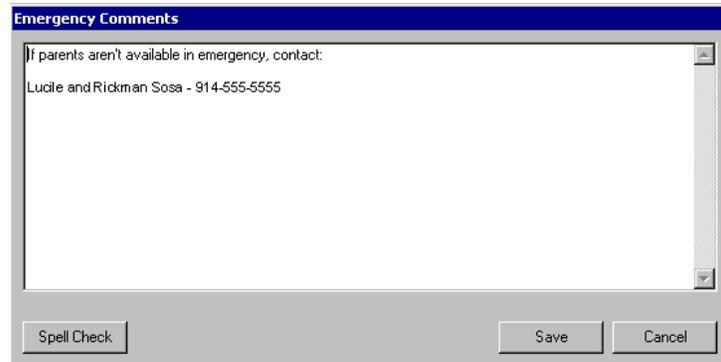
This tab contains demographic information taken from the *Home Demographics* window. The upper section includes: Home Name, Legal Name, Authorizing Agency, Sub Agency, Respite, Setting, Status, Source of Inquiry, Marital Status, Language, Religion, Ethnicity/Ethnic Origin, and Race. The grid in the lower section lists both Primary and Business address and phone number information. The default sort for information in this grid is by “Address Type” with the Primary Address being listed first. The grid can be resorted by any column by clicking on the heading of that column. The “Resource Lien Filed” checkbox will display a check if a Resource Lien has been filed.

The information you view in the **Home Demographics** tab cannot be updated from within the FRS. To update the information in this tab, you must close the FRS window and then open the appropriate CONNECTIONS window(s).

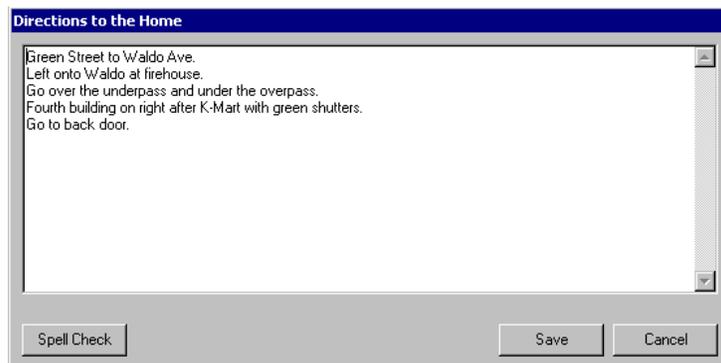
Buttons

The **Home Demographics** tab also contains two buttons:

Emergency Backup: Clicking this button opens a separate comments box for entering information on the persons to be contacted in an emergency situation if the foster parents cannot be reached. This information will be saved to the database. The checkbox next to the **Emergency Backup** button will automatically be checked when comments have been entered and saved to the database.



Directions to the Home: Clicking this button opens a separate comments box for entering directions to the home. This information will be saved to the database. The checkbox next to the **Directions to the Home** button will automatically be checked when comments have been entered and saved to the database.



The *Emergency Backup* and *Directions to the Home* windows each contains three buttons: **Spell Check**, **Save**, and **Cancel**. The **Save** button saves the newly entered information to the CONNECTIONS database and a **Cancel** button deletes that information. Clicking **Save** or **Cancel** closes the window and returns you to the **Home Demographics** tab.

3c – Licensing Information Tab

The screenshot shows the 'Foster and Adoptive Home Record Summary' window with the 'Licensing Information' tab selected. The window title bar includes 'File Options Help'. The main content area is divided into several sections:

- Header Information:** Resource Name: Sosa-Crossoft,Michelle; Auth From Date: 3/6/02; Auth To Date: 3/6/03; Vendor ID: 00987654; Resource ID: 20115468; Agency Name/Resource ID: Sullivan County Dss / 213.
- Navigation Tabs:** Home Demo, **Licensing Information**, Household Member Detail, Home History Events, Agy./Worker Information, Home Study Narrative, Annual Reauth. Narrative, FAD Checklist, Contacts.
- Form Fields:**
 - Setting: Foster Home
 - Facility Type: Certified Foster Home
 - Status: Accepted - Active
 - Program Types: Regular
 - Anticipated Auth Period upon Approval: Auth From: 3/6/03, Auth To: 3/6/04
 - On Hold:
 - Male Age Range Approved: Minimum Year: 1, Minimum Month: 0, Maximum Year: 4, Maximum Month: 0
 - Female Age Range Approved: Minimum Year: 1, Minimum Month: 0, Maximum Year: 4, Maximum Month: 0
 - Placement Information: Capacity: 2, Open Slots: 2
 - Child Characteristics:
 - Child Race/Eth/Rel/Languages:
- Buttons:** Submit, Help on Narratives, Generate Report, Close.

This tab displays information taken from the *F/A Home License* window. The upper section includes Setting, Facility Type (previously titled LOC), Status, and Program Types.

The “Anticipated Authorization Period Upon Approval” section appears on this tab when the FRS is entered via the Annual Reauthorization task. The dates that appear here are system-calculated and indicate what the new certification or approval period will be upon approval.

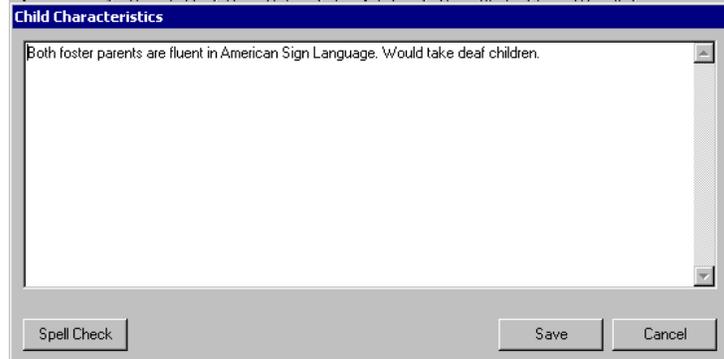
The center portion of the tab displays the Approved Male and Female Age Ranges. Underneath those fields is the Placement Information for Capacity and Open Slots.

The information you view in the Licensing Information tab cannot be updated from within the FRS. To update the information in this tab, you must close the FRS window and then open the appropriate CONNECTIONS window(s).

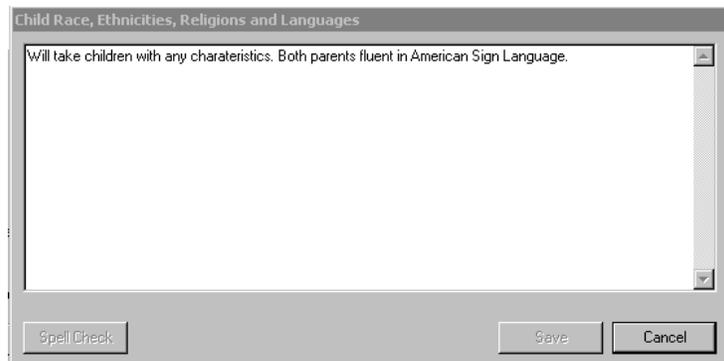
Buttons

The **Licensing Information** tab also contains two buttons that open windows for recording child characteristics that foster parents have identified for potential child placements:

Child Characteristics: Clicking this button opens a separate comments box for entering information on Child Characteristics Accepted. This information is saved to the database. The checkbox next to the **Child Characteristics** button will automatically be checked when comments have been entered and saved to the database.



Child Race/Eth/Rel/Languages: Clicking this button opens the *Child Race, Ethnicities, Religions and Languages* window, a separate comments box for entering child races, ethnicities, religions, and languages. This information is saved to the database. The checkbox next to the **Child Race/Eth/Rel/Languages** button will automatically be checked when comments have been entered and saved to the database.



The *Child Race, Ethnicities, Religions and Languages* window contains three buttons: **Spell Check**, **Save**, and **Cancel**. The **Save** button saves the newly entered information to the CONNECTIONS database and a **Cancel** button deletes that information. Clicking **Save** or **Cancel** closes the window and returns you to the **Licensing Information** tab.

3d – Household Member Detail Tab

Foster and Adoptive Home Record Summary

File Options Help

Resource Name: Sosa-Crosoft,Michelle Auth From Date: 3/6/02 Auth To Date: 3/6/03 Vendor ID: 00987654
 Resource ID: 20115468 Agency Name/Resource ID: Sullivan County Dss / 213

Home Demo. Licensing Information **Household Member Detail** Home History Events Agcy./Worker Information Home Study Narrative Annual Reauth. Narrative FAD Checklist Contacts

Name	Sex	DOB	Age	Language	Religion	Marital Status	Ethnicity	Race	Rel/Int	Date Added to St
Sosa-Crosoft,Michelle	F	7/3/59	42	English	Catholic	Married	Hispanic or La	Other - E	Foster Parent	
Crosoft,Michael	M	2/13/58	44	English	Catholic	Married	Non-Hispanic	Black or A	Foster Parent	
Crosoft,Martin	M	1/15/84	18	English	Catholic	Child,not appli	Hispanic or La	Other - E		

Medical Exam Date	FP Cards Sent	FP Cards Recd	FP Results	Safety Asmnt Dt	SCR DB Check Sent	SCR DB Check Recd	St
3/5/02	3/6/02	3/6/02	No Record Found		3/5/02	3/5/02	No Re
3/5/02	3/6/02	3/6/02	Discretionary Disqualifier	3/8/02	3/5/02	3/5/02	Re
3/5/02	3/6/02	3/6/02	No Record Found		3/5/02	3/5/02	No Re

Enter with Dropdown Enter by Typing Enter with Dropdown

A.K.A. Names Case List Training Details
 Person ID Person Detail FA Safety Assessment Template Training Comments Med/CHRC and SCR Comments Employment Comments

Submit Help on Narratives Generate Report Close

This tab displays information taken from the *Person Detail* window and it includes 2 grids.

Upper Grid

The upper grid includes the following information for each household member: **Name, Sex, Date Of Birth, Age, Language, Religion, Marital Status, Ethnicity, Race, Relationship/Interest, and Date the Person was Added to the FAD home.**

When one of the people in the upper grid is selected (by clicking on their line), an arrow will appear to the left of their name. A similar arrow will appear to the left of one of the lines in the lower grid. This makes it clear which line of information in the lower grid applies to which person in the upper grid.

Lower Grid

The lower grid contains the following information for each household member: **Medical Exam Date, Fingerprint Cards Sent Date, Fingerprint Cards Received Date, Fingerprint Results, Safety Assessment Date, SCR Database Check Sent, SCR Database Check Received, and SCR Results.**

The information in the last five of these columns can ONLY be updated in the FRS:

Fingerprint Results: Clicking in this cell of the grid for the selected person opens a drop down box with the following choices:

1. No Record Found
2. Presumptive Disqualification
3. Discretionary Disqualifier
4. Hold in Abeyance

Note: If option 2, 3, or 4 is chosen, the following message will display:

“Option selected for Fingerprint Results requires a Safety Assessment.”

Safety Assessment Date, SCR Database Check Sent, and SCR Database Check Received: In each of these columns, the date in question can be entered directly into the grid by clicking in the cell on the grid and typing the date directly into the cell.

SCR Results: Clicking in this cell for the selected person opens a drop down box with the following choices:

1. No Record Found
2. Record Found

Once information is entered into any cell in the lower grid the **Save** button is used to save the information to the database. The **Cancel** button is used to move from this grid to other parts of the FRS without saving information.

With the exception of the columns mentioned above, the information you view in the **Household Member Detail** tab cannot be updated from within the FRS. To update the information in this tab, you must close the FRS window and then open the appropriate CONNECTIONS window(s).

Buttons

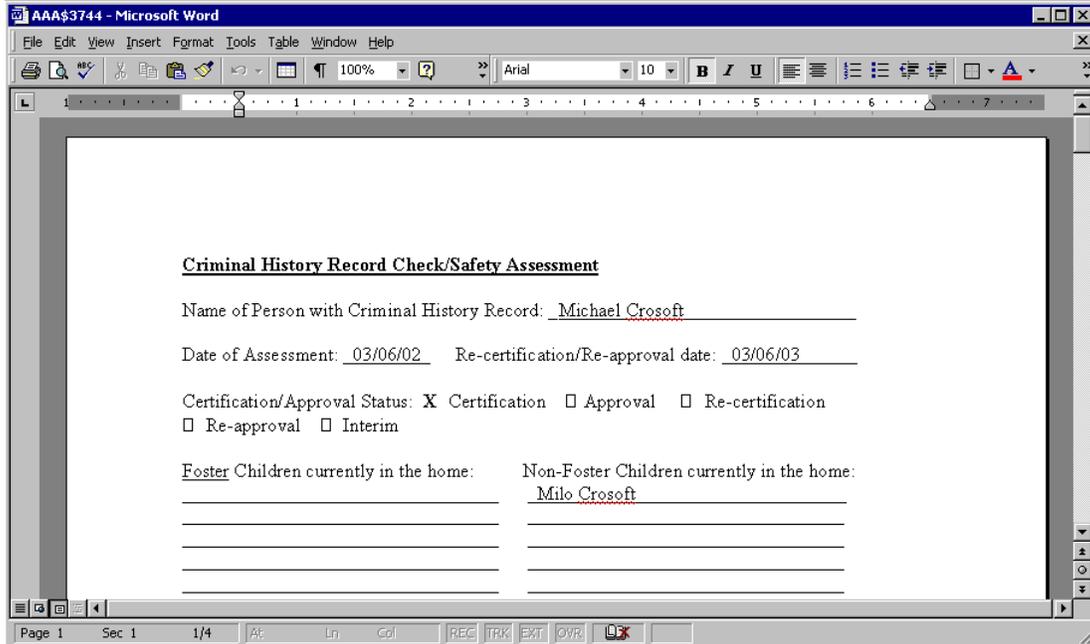
A.K.A. Names, Person ID, Case List, Person Detail FA, and Training Details:

Additional information on Household Members is available through these buttons that appear at the bottom of the **Household Member Detail** tab.

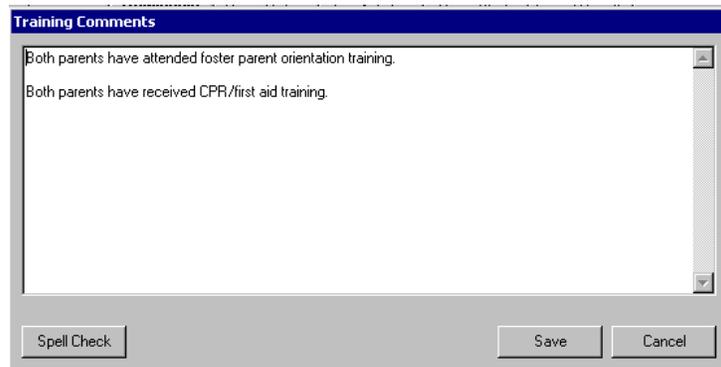
1. Select a person by clicking their name in the upper grid.
2. Click one of the buttons listed above to retrieve that information for the selected individual.

Note: These buttons will always be active. If a particular button's information has not been entered into CONNECTIONS for the highlighted person, clicking the button will display a pop up window with the message “No Data Available.”

Safety Assessment Template: This button opens the Safety Assessment template in a separate Word window. A Safety Assessment should be completed when a fingerprint check returns a result of anything other than “No Record Found.”



Training Comments: Clicking this button opens a separate comments box for entering comments on training taken by the person selected in the upper grid of the Household Member Detail tab. This information is saved to the database. The checkbox next to the **Training Comments** button will automatically be checked when comments have been entered and saved to the database for the person selected in the upper grid.



Med/CHRC and SCR Comments: Clicking this button opens a separate comments box with three sections. The upper section is for Medical comments, the middle section is for comments on the Criminal History Record Check (CHRC), and the lower section is for additional information pertaining to the results of the SCR clearance check on the person selected in the upper grid of the Household Member Detail tab. This information is saved to the database. The checkbox next to the **Med/CHRC and SCR Comments** button will automatically be checked when comments have been entered and saved to the database for the person selected in the upper grid.

Medical, CHRC and SCR Comments

Medical: Entire family had medical exams in the week prior to opening of home in CONNECTIONS.

CHRC: Michèle's fingerprint results returned "No Record Found."

SCR: No Records Found.

Spell Check Save Cancel

Employment Comments: Clicking this button opens the *Current Source of Income and Details* window, a separate comments box for entering additional information on the employment and income of the person selected in the upper grid of the Household Member Detail tab. This information is saved to the database. The checkbox next to the **Employment Comments** button will automatically be checked when comments have been entered and saved to the database for the person selected in the upper grid.

Current Source of Income and Details

Mother just received promotion and raise at General Electric.

Spell Check Save Cancel

The *Training Comments*, *Med/CHRC and SCR Comments*, and *Current Source of Income and Details* windows each contains three buttons: **Spell Check**, **Save**, and **Cancel**. The **Save** button saves the newly entered information to the CONNECTIONS database and a **Cancel** button deletes that information. Clicking **Save** or **Cancel** closes the window and returns you to the **Household Member Detail** tab.

3e – Home History Events Tab

Foster and Adoptive Home Record Summary

File Help

Resource Name: Sosa-Crosoft,Michelle Auth From Date: 3/6/02 Auth To Date: 3/6/03 Vendor ID: 00987654
 Resource ID: 20115468 Agency Name/Resource ID: Sullivan County Dss / 213

Home Demo. Licensing Information Household Member Detail **Home History Events** Agy./Worker Information Home Study Narrative Annual Reauth. Narrative FAD Checklist Contacts

Event Date	TX Date	Event Status	Event Type	Event Description
3/6/02	3/6/02	PROC	Home	Home Study
3/6/02	3/6/02	COMP	Approval	WM - \$\$\$Approve Home Name Change - 21672945
3/6/02	3/6/02	APRV	Stage	Case,Stage,Home Name Change: Crosoft,Michelle to Sosa-Crosoft,Michelle
3/6/02	3/6/02	APRV	Home	Changed home status to Approved- Active.
3/6/02	3/6/02	COMP	Approval	WM - Approve Bundled FRS / Home License - 21672945
3/6/02	3/6/02	APRV	Home	Changed home status to Pending Acceptance & maintained licensing informati
3/6/02	3/6/02	COMP	Home	Non-Licensing Change Made
3/6/02	3/6/02	APRV	Home	Home Study
3/6/02	3/6/02	COMP	Home	Changed home status to Applicant & maintained licensing information.
3/6/02	3/6/02	COMP	Assignment	Secondary Assignment Issued For: Boson, Sarah of Cnty/Agy : 048
3/6/02	3/6/02	COMP	Home	New Home Created

Submit Help on Narratives Generate Report Close

This tab will list certain events that relate to the history of the home, including all approvable events and any assignment events where the agency or sub-agency has changed. The following information is listed for each event: **Event Date**, **TX Date** (System Transmission Date), **Event Status**, **Event Type**, and **Event Description**.

Note: Although the titles are similar, the **Home History Events** tab of the FRS does not display the same information as the *F/A Home History* window found elsewhere in CONNECTIONS (accessed through the **View Home History** task on the *FAD Task List*.)

The information you view in the Home History Events tab cannot be updated within the FRS.

3f – Agency/Worker Information Tab

Foster and Adoptive Home Record Summary

File Help

Resource Name: Sosa-Crosoft,Michelle Auth From Date: 3/6/02 Auth To Date: 3/6/03 Vendor ID: 00987654
 Resource ID: 20115468 Agency Name/Resource ID: Sullivan County Dss / 213

Home Demo. Licensing Information Household Member Detail Home History Events **Agy./Worker Information** Home Study Narrative Annual Reauth. Narrative FAD Checklist Contacts

	Worker Role	Worker Name	Worker Phone	Agency Name	Agency Code	Agency Resource ID	Unit	Site	Agency Phone
▶	Primary	Ballou, Wally	(914) 333-3333	Sullivan County Dss	A48	213	02E	4A8	(914) 333-3333
	Secondary	Boson, Sarah	(914) 444-4444	Sullivan County Dss	A48	213	011	4A8	(914) 444-4444

Submit Help on Narratives Generate Report Close

This tab lists the following information for all current workers assigned to the home: **Worker Role, Worker Name, Worker Phone, Agency Name, Agency Code, Agency Resource ID, Unit, Site, and Agency Phone.**

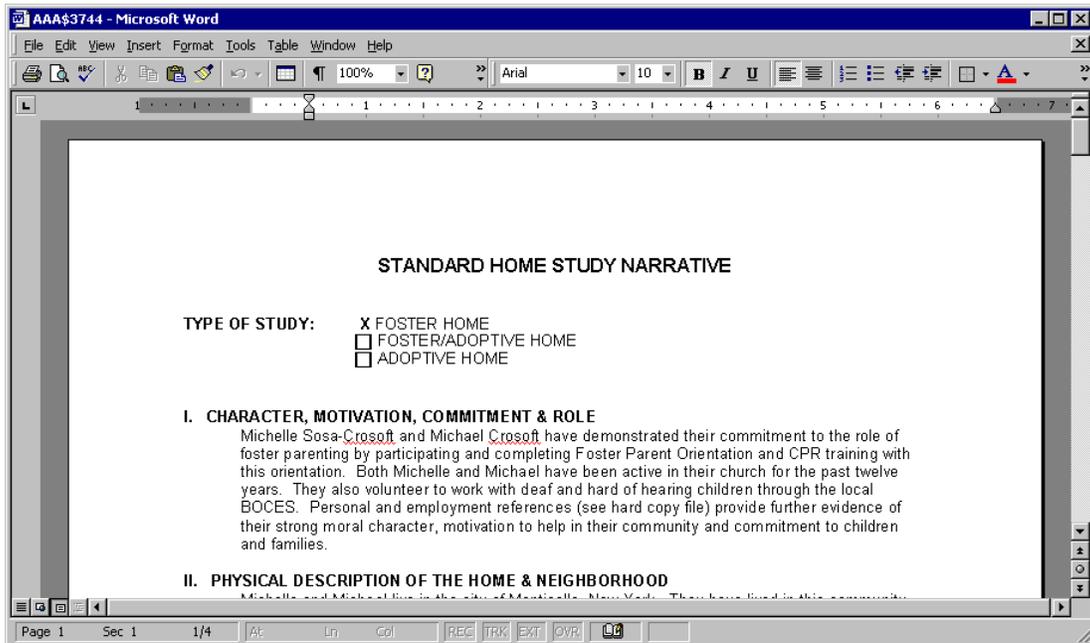
The information you view in the Agency/Worker Information tab cannot be updated from within the FRS. To update the information in this tab, you must close the FRS window and follow the process for reassigning the home.

3g – Home Study Narrative Tab

With the introduction of the FAD Record Summary process, the FRS becomes the primary mechanism for the creation and updating of Home Study Narratives. (The **Home Study** button and checkbox have been removed from the *Home License* window.)

The **Home Study Narrative** tab provides for the indication of the reason(s) for the Home Study. Choices include “Initial Home Study”, “Reopen a Home”, “Agency Transfer”, and a list of reasons for an “Interim Home Study.” (Interim Home Study reasons are changes to the home that don’t affect the home’s “from/to” certification dates.) More than one reason can be selected. The selected reason(s) will be displayed on the printed Home Study Narrative. A **Save** button saves the selected reason(s) to the CONNECTIONS database and a **Cancel** button cancels the choice.

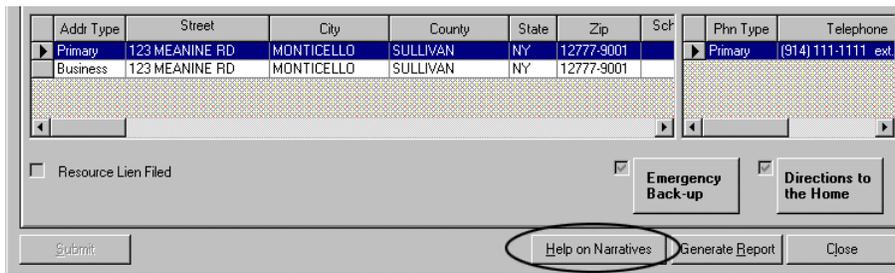
The **Home Study Narrative** tab also provides access to a choice of two Home Study narrative templates: The OCFS Standard Home Study and the GPS/MAPP Home Study. Choose the Home Study template required by your agency’s local procedures. (An option for selecting a locally produced Home Study template is visible but is disabled until a future implementation.) Home Study narratives that existed prior to Build 15 will be converted and available for reference through the *Event List*. These narratives can be copied and pasted into the FRS Home Study Narrative using the methods described in the Copy and Paste Guidelines on page 49.



The **Retrieve/Edit Narrative** button opens the selected Home Study in a separate Word document. Whether this document contains previously entered material and whether those entries are editable depends on the task through which the FRS was entered and the circumstances under which the narrative was opened. These conditions are described in “The FAD Recording Process Using the FRS” on page 34.

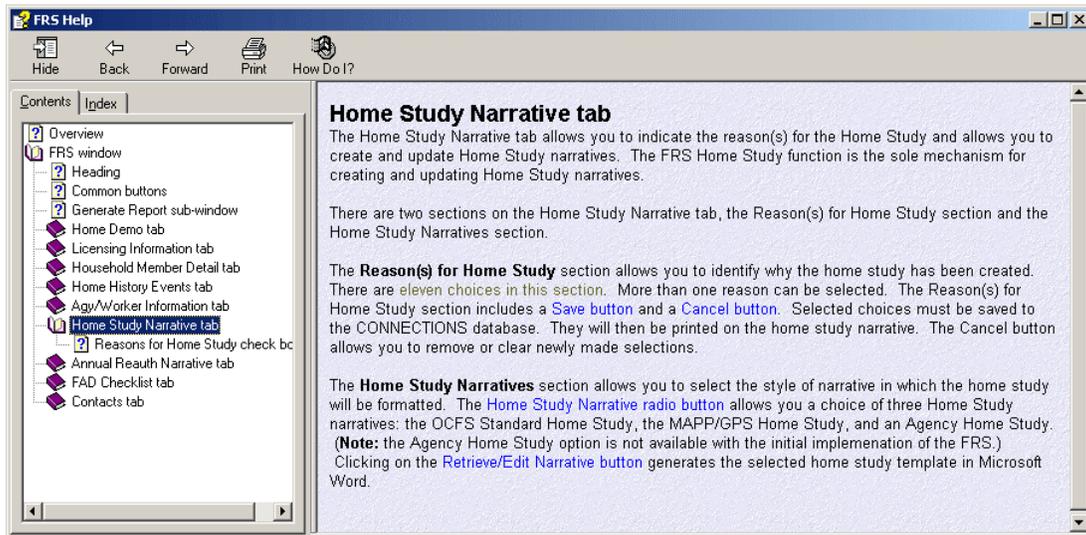
Help On Narratives

You can access help information about how to use the Home Study Narrative by clicking on the **Help on Narratives** button at the bottom of the FRS window.



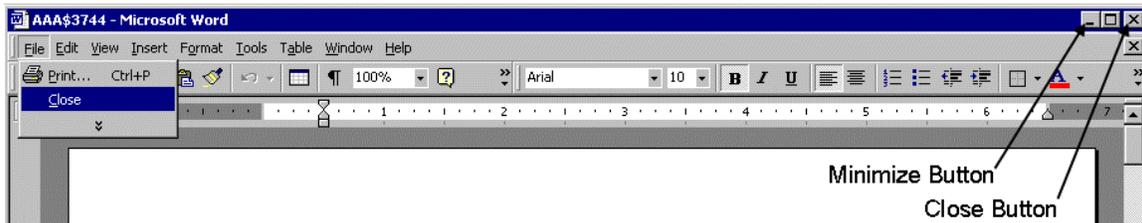
It’s important to realize that the **Help on Narratives** button is hidden when you click on the **Retrieve/Edit Narrative** button because this opens the Word document, which covers the FRS window. The **Help on Narratives** button is visible when you close or minimize the narrative document. (See “Closing or Minimizing the Home Study Narrative” on page 24.)

When you click the **Help on Narratives** button while the Home Study Narrative tab is open, you will access Help information on using the Home Study Narrative.



Closing and Minimizing the Home Study Narrative

You can close the Home Study Narrative by clicking on the *File* drop down menu and selecting **Close**. Alternatively, you can click on the **Close** window button in the upper right corner of the Word document window. Either method will save the narrative to the CONNECTIONS database and return you to the Home Study tab with the **Retrieve/Edit Narrative** button visible.



Rather than closing the document, you can minimize it using the **Minimize** button in the upper right hand corner of the Word document window.

To re-open a minimized document, click on either the document's Task Bar button at the bottom of the screen or the **Retrieve/Edit** button on the **Home Study Narrative** tab.

Note: Be sure to save your narrative before minimizing since minimizing does not save your work.

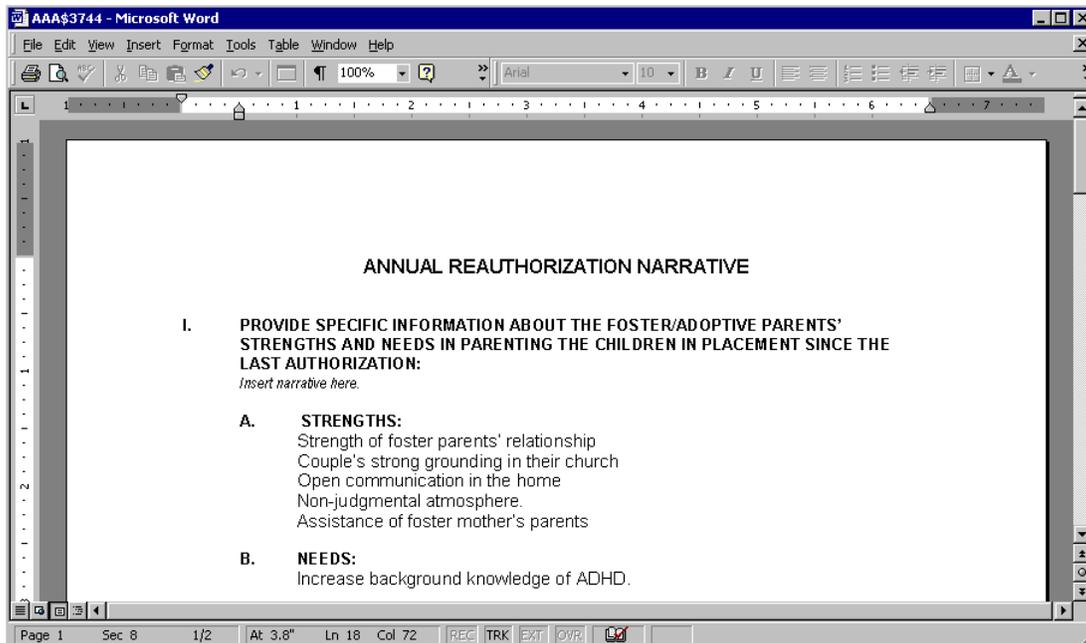
3h – Annual Reauthorization Narrative Tab

The screenshot displays the 'Foster and Adoptive Home Record Summary' window. At the top, there is a menu bar with 'File', 'Options', and 'Help'. Below the menu bar, the following information is displayed: Resource Name: Sosa-Crosoft,Michelle; Auth From Date: 3/6/02; Auth To Date: 3/6/03; Vendor ID: 00987654; Resource ID: 20115468; Agency Name/Resource ID: Sullivan County Dss / 213. A horizontal tab bar contains the following tabs: Home Demo, Licensing Information, Household Member Detail, Home History Events, Agy./Worker Information, Home Study Narrative, **Annual Reauth. Narrative** (which is highlighted), FAD Checklist, and Contacts. The main content area shows a dialog box titled 'Annual Reauthorization' with two radio buttons: 'Standard Annual Reauthorization' (which is selected) and 'Agency Annual Reauthorization'. Below the radio buttons is a button labeled 'Retrieve/Edit Narrative', which is circled in red. At the bottom of the window, there are four buttons: 'Submit', 'Help on Narratives', 'Generate Report', and 'Close'.

The **Annual Reauthorization** tab will be the active tab whenever the FRS is entered via the **Annual Reauthorization** task in the *Task List*.

Note: The **Annual Reauthorization** Task is only available on the *Task List* during the 90 days prior to the home's certification or approval due date. At all other times, all pushbuttons on the *Task List* are disabled when the **Annual Reauthorization** task is selected.

With the introduction of the FAD Record Summary process, the FRS becomes the primary mechanism for the creation and updating of Annual Reauthorization Narratives. Annual Reauthorization narratives that existed prior to Build 15 will be available for reference through the *Event List* as they have been in the past. These narratives can be copied and pasted into the FRS Annual Reauthorization Narrative using the methods described in the Copy and Paste Guidelines on page 49. The FRS will provide an OCFS template into which information can be entered. An option for selecting a locally produced Annual Reauthorization template is visible but is disabled until a future implementation.



The **Retrieve/Edit Narrative** button opens the selected Reauthorization narrative in a separate Word document. Whether this document contains previously entered material and whether those entries are editable depends on the task through which the FRS was entered and the circumstances under which the narrative was opened. These conditions are described in “The FAD Recording Process Using the FRS” on page 34.

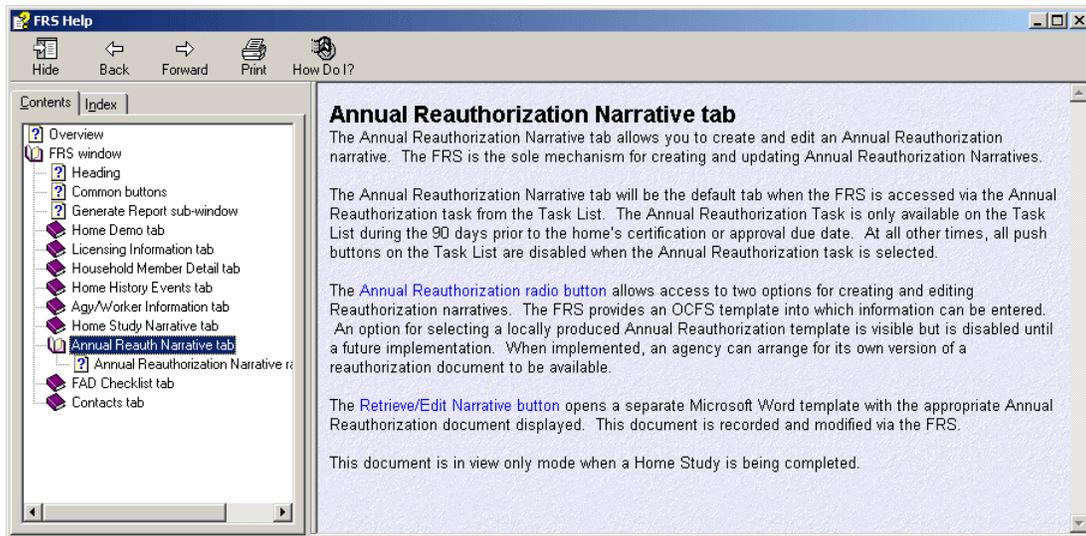
Help On Narratives

You can access help information about how to use the Annual Reauthorization Narrative by clicking on the **Help on Narratives** button at the bottom of the FRS window.



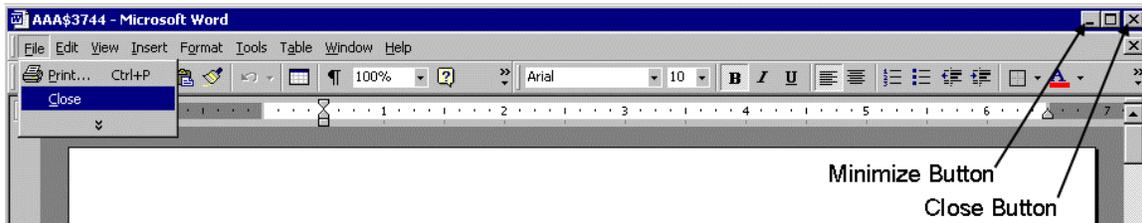
It's important to realize that the **Help on Narratives** button is hidden when you click on the **Retrieve/Edit Narrative** button because this opens the Word document, which covers the FRS window. The **Help on Narratives** button is visible when you close or minimize the narrative document. (See “Closing or Minimizing the Annual Reauthorization Narrative” on page 27.)

When you click the **Help on Narratives** button while the Annual Reauthorization Narrative tab is open, you will access Help information on using the Annual Reauthorization Narrative.



Closing and Minimizing the Annual Reauthorization Narrative

You can close the Annual Reauthorization Narrative by clicking on the *File* drop down menu and selecting **Close**. Alternatively, you can click on the **Close** window button in the upper right hand corner of the Word document window. Either method will save the narrative to the CONNECTIONS database and return you to the **Annual Reauthorization Narrative** tab with the **Retrieve/Edit Narrative** button visible.



Rather than closing the document, you can minimize it using the **Minimize** button in the upper right hand corner of the Word document window.

To re-open a minimized document, click on either the document's Task Bar button at the bottom of the screen or the **Retrieve/Edit** button on the **Annual Reauthorization** tab.

Note: Be sure to save your narrative before minimizing since minimizing does not save your work.

3i – FAD Checklist Tab

Foster and Adoptive Home Record Summary

File Options Help

Resource Name: Sosa-Crossoft,Michelle Auth From Date: 3/6/02 Auth To Date: 3/6/03 Vendor ID: 00987654
 Resource ID: 20115468 Agency Name/Resource ID: Sullivan County Dss / 213

Home Demo. Licensing Information Household Member Detail Home History Events Agy./Worker Information Home Study Narrative Annual Reauth. Narrative **FAD Checklist** Contacts

Application Process:	Date	Home Study Process:	Date
Written response to inquiry completed:	2/18/02	Foster/Adoptive Parent orientation completed:	3/6/02
Appointment for orientation scheduled:	2/19/02	Home Study written:	3/6/02
Provide application and medical forms to applicant:	2/19/02	Key Health/Safety/Physical Plant standards met	
Affidavit on criminal convictions:	2/21/02	Adequate and safe water supply verified:	3/6/02
If conviction exists, statement sent as to why still approved:	3/5/02	Window barriers verified:	3/6/02
Notification to applicant re:fingerprinting requirements:	3/6/02	Fire safety and at least 1 smoke detector verified:	3/6/02
Notification to applicant re:SCR database check:	3/6/02	Securely stored firearms:	3/6/02
If SCR record exists, statement sent as to why still approved:		All other Health/Safety/Physical Plant standards met:	3/6/02
Receipt of completed application:	3/5/02	Foster Parent agreement signed:	3/6/02
Acknowledgement of completed application:	3/5/02	Review of completed Home Study by prospective Foster/Adoptive Parents:	3/6/02
Verification of marital status:	2/21/02	Provide Foster Parents w/Child Placement Register:	3/6/02
Verification of employment history/income:	2/21/02	Provide Foster Parents w/Policy Manual:	3/6/02
Verification of employment references:	2/21/02		
Verification of personal references (at least 3)	2/25/02		
Acknowledgement of medical report (within 15 days)	3/5/02		

Record person specific items on the Household Member Detail tab **Emergency** **Reauth/Renewal** **Additional Items**

Submit Help on Narratives Generate Report Close

The FAD Checklist tab provides a tool for recording and verifying that all necessary tasks for proper certification and authorization of Foster and Adoptive Homes have been completed.

The tab contains two sets of entries: The first displays tasks required in the FAD Application process. The second displays tasks for the Home Study process. Following each task is a field in which completion dates can be directly entered by clicking and typing in the field. This allows workers to record the timeline of their progress through the FAD development process.

Buttons

Save: Saves entered dates to the CONNECTIONS database. Only enabled if dates have been entered or changed.

Cancel: Cancels entered dates without saving them. Only enabled if dates have been entered or changed.

Additional checklists for components of the FAD development process are available through buttons that appear at the bottom of the **FAD Checklist** tab. These are the **Emergency**, **Reauth/Renewal**, and **Additional Items** buttons.

Emergency: Clicking this button opens a separate window containing a checklist of tasks required to open an Emergency Foster home. As on the main checklist tab, each task is followed by a field for entering or updating completion dates.

Reauth/Renewal: Clicking this button opens a separate window containing a checklist of tasks specific to completing a Reauthorization or Renewal of a home. As on the main checklist tab, each task is followed by a field for entering or updating completion dates.
Note: This button is disabled when the FRS is accessed via the **Home Study** Task.

Additional Items: Clicking this button opens a separate window containing a blank checklist. Any tasks not listed on any of the previous checklists can be entered here. As on the main checklist tab, each task is followed by a field for entering or updating completion dates.

The *Emergency, Reauth/Renewal, and Additional Items* windows each include **Save** and **Cancel** buttons, each of which returns you to the **FAD Checklist** tab.

3j - Contacts Tab

Foster and Adoptive Home Record Summary
 File Options Help

Resource Name: Sosa-Crosft,Michelle Auth From Date: 3/6/02 Auth To Date: 3/6/03 Vendor ID: 00987654
 Resource ID: 20115468 Agency Name/Resource ID: Sullivan County Dss / 213

Home Demo. Licensing Information Household Member Detail Home History Events Agy./Worker Information Home Study Narrative Annual Reauth. Narrative FAD Checklist **Contacts**

	Date/Time Recorded	Contact Date	Contacted By	Method	Purpose	Location
▶	3/6/02 3:15:13 PM	2/7/02	Wally Ballou	Face to Face	Recruitment	Other
	3/7/02 11:16:23 AM	2/21/02	Wally Ballou	Face to Face	Foster Parent Training	Office
	3/7/02 11:13:01 AM	2/19/02	Wally Ballou	Face to Face	Other	Office
	3/7/02 11:17:56 AM	2/25/02	Wally Ballou	Correspondence Received	Other	Office
	3/7/02 11:22:19 AM	3/5/02	Wally Ballou	Face to Face	Other	Office
	3/7/02 11:36:16 AM	3/6/02	Wally Ballou	Other	Other	Office
	3/7/02 11:32:22 AM	3/6/02	Wally Ballou	Face to Face	Initial Visit	Foster Home
	3/7/02 11:34:03 AM	3/7/02	Wally Ballou	Face to Face	Other	Office

Add New Contact Details Delete

Submit Help on Narratives Generate Report Close

With the introduction of the FAD Record Summary process, the FRS becomes the primary mechanism for the creation and updating of Contact information. The **Contacts** tab provides a single place to enter information on all contacts made for a home. The Contacts information is the contemporaneous record for the home. It is meant to be continually updated throughout the FAD process. All contacts should be recorded in the FRS Contacts tab.

The single grid visible on the tab itself lists the following for each contact: **Date/Time Recorded, Contact Date, Contacted By, Method, Purpose, and Location.**

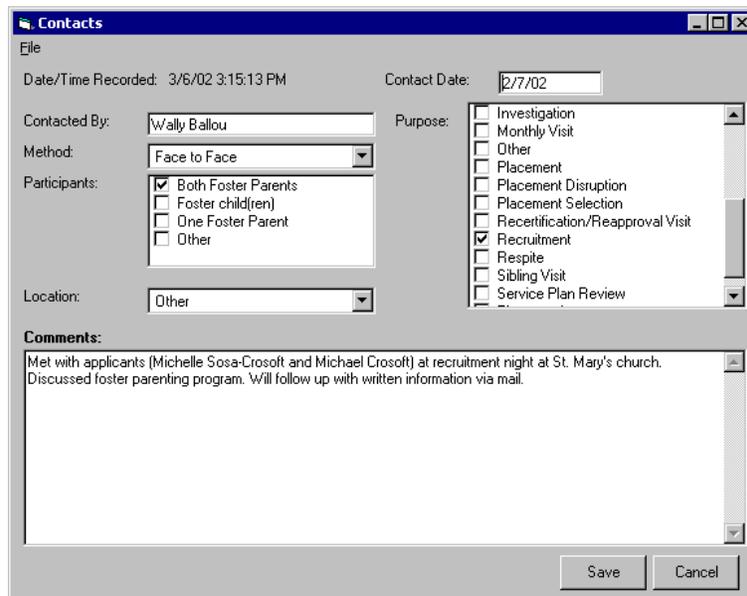
Buttons

Contacts are added, updated, and deleted through the use of three buttons that appear at the bottom of the tab: **Add New, Contact Details, and Delete.**

Add New: Clicking this button opens a blank Contacts template for entering a new contact.

Contact Details: This buttons opens an existing home contact to allow the updating of details and recording of additional comments. Contact Details can be edited up to the point that the FRS is approved and frozen. To access an existing contact:

1. Select the contact you wish to update by clicking on its row in the grid on the **Contacts** tab.
2. Click the **Contact Details** button at the bottom of the tab.



The screenshot shows a window titled "Contacts" with a menu bar containing "File". The window contains the following fields and controls:

- Date/Time Recorded:** 3/6/02 3:15:13 PM
- Contact Date:** 2/7/02
- Contacted By:** Wally Ballou
- Method:** Face to Face (dropdown menu)
- Participants:** A checklist with options: Both Foster Parents, Foster child(ren), One Foster Parent, Other
- Purpose:** A list of checkboxes: Investigation, Monthly Visit, Other, Placement, Placement Disruption, Placement Selection, Recertification/Reapproval Visit, Recruitment, Respite, Sibling Visit, Service Plan Review
- Location:** Other (dropdown menu)
- Comments:** A text area containing the text: "Met with applicants (Michelle Sosa-Crossoft and Michael Crossoft) at recruitment night at St. Mary's church. Discussed foster parenting program. Will follow up with written information via mail."
- Buttons:** Save and Cancel buttons at the bottom right.

- Information is entered on the *Contacts* window by typing, through the use of drop-down lists, or with checklists.
- The *Contacts* window includes a **Save** button and a **Cancel** button, each of which returns you to the **Contacts** tab.

Delete: This button deletes a contact. As with the **Contact Details** button, you must first select a contact by clicking its row in the grid on the **Contacts** tab. The **Delete** button will be disabled if the selected contact is part of an FRS that has already been approved and frozen.

The Fad Checklist, Contacts and the Home Study

Keep in mind that, unless you are within the 90 day reauthorization period, you must enter the FRS via the **Home Study** task on the (*Task List*) in order to use the FAD Checklist, or create and update Contacts information. Doing so either accesses an in-process home study or creates a new home study. If the FRS is being used to continually update Contacts information as it was designed to do, there will always be an in-process home study for the home. This becomes a factor in the Reauthorization process. (See “The FAD Recording Process Using the FRS – Annual Reauthorization” on page 41.)

4 - FRS Online Help

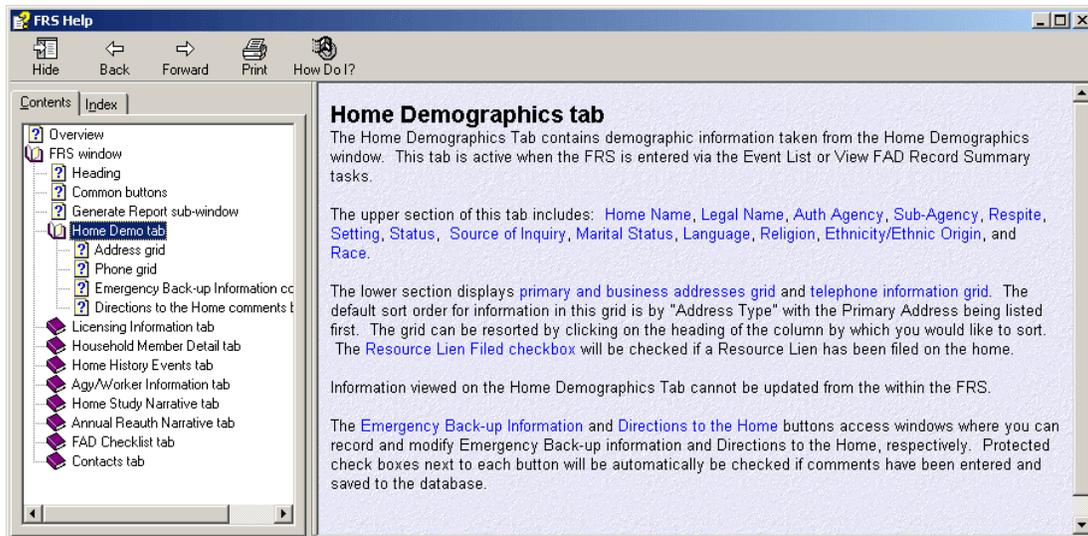
Context sensitive help information is available for all elements of the FRS including tabs, grids, buttons, and individual fields. Click on an element to make that element “active” and press the **F1** key on your keyboard. Information about that element of the FRS will be displayed.

Please note that **F1** will not activate FRS Help when you are viewing the Home Study or Annual Reauthorization narratives. Help for these documents is available through the **Help On Narratives** button.

The FRS Help system looks quite different and has more features than the Help in CONNECTIONS that has been available in the past. FRS On Line Help includes the following features:

- A Table of Contents allowing access to all Help information.
- Index and Search functions provide alternate means of finding information.
- Interactive graphic examples of FRS elements. Clicking on certain portions of a graphic within FRS On Line Help will open explanations of that element. (Available Summer 2002.)
- Hyperlinks appear throughout the Help information. These links will take you directly to related information such as definitions and procedural guidelines.

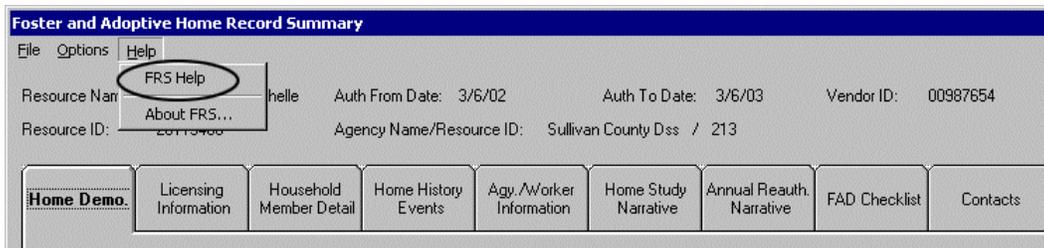
When you press **F1**, you will open the FRS Help system. Information specific to the FRS element that was active when you pressed **F1** will be displayed. Once you are in the Help system, the table of Contents allows you to have access to help information on other elements of FRS.



Besides context sensitive help information on FRS elements such as fields, tabs, and buttons, the FRS Help system includes the following:

FRS Overview

- A high level summary of the FRS including a listing of its features and functions.
 This overview can be accessed directly by clicking the word *Help* that appears in the upper left corner of the FRS window and then clicking on *FRS Help* which appears in the small drop-down menu.



"How Do I?" Help

- Information on how to navigate within the FRS and how to best utilize its functions.

Glossary (Available Summer 2002)

- Definitions of terms commonly used in FAD casework
- Definitions of FRS elements and concepts

Guidelines (Available Summer 2002)

- Background on the legal, policy, and procedural guidelines followed by FAD workers as they develop and record the information viewed in the FRS.

Help on Help

- Instructions on how to use the FRS Online Help system.

Key elements of the information in this job aid relating to features and functionality of the FRS can also be found in the FRS Online Help.

5 - Printing the FRS

Printing in the FAD Record Summary is done through the **Generate Report** button that appears at the bottom of the FRS window.

Addr Type	Street	City	County	State	Zip	Sch	Phn Type	Telephone
Primary	123 MEANINE RD	MONTICELLO	SULLIVAN	NY	12777-9001		Primary	(914) 111-1111 ext.
Business	123 MEANINE RD	MONTICELLO	SULLIVAN	NY	12777-9001			

Resource Lien Filed Emergency Back-up Directions to the Home

Submit Help on Narratives **Generate Report** Close

Clicking this button opens the *Generate Report* window.

Generate Report

Check the checkbox for each tab to be included in the report. Select All Tabs to generate a report of all tabs.

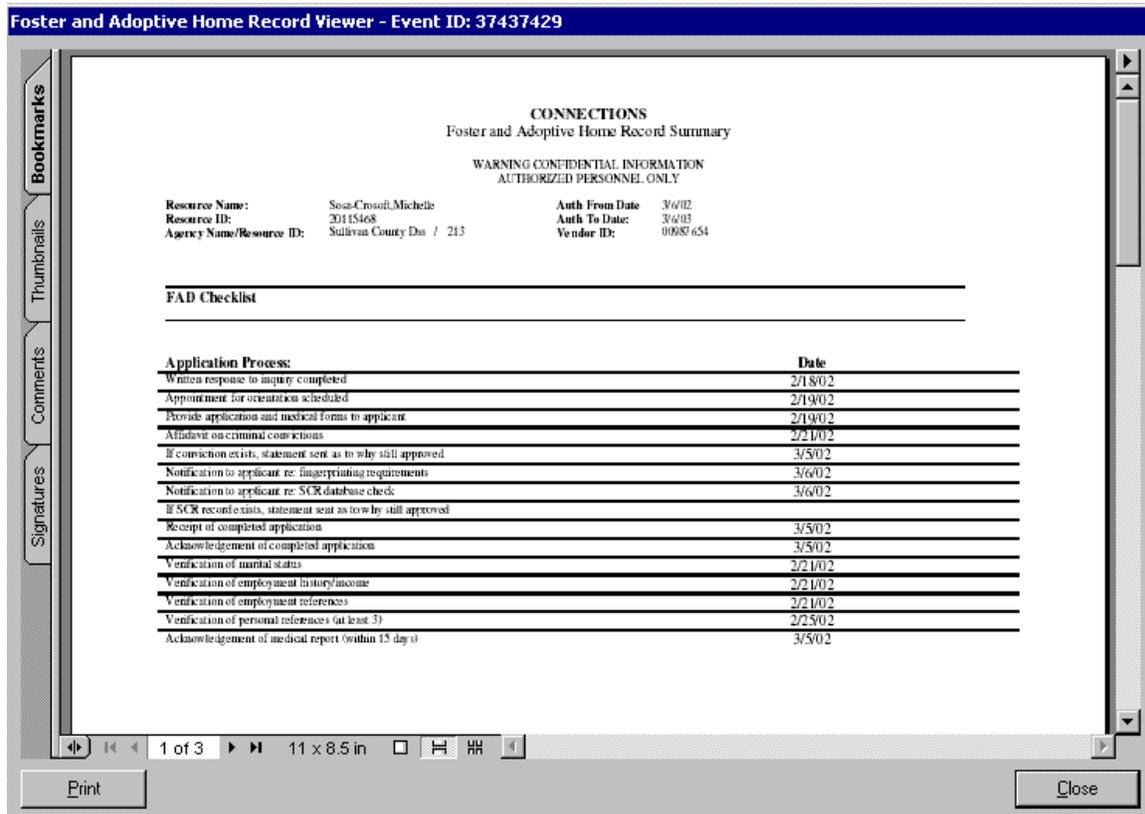
All Tabs

- Home Demographics
- Licensing Information
- Household Member Detail
- Home History Events
- Agency/Worker Information
- Home Study Narrative
- Annual Reauthorization Narrative
- FAD Checklist
- Contacts

OK Cancel

In the *Generate Report* window you can click the “All Tabs” checkbox to print all the information in the FRS, or you can choose to print the information from any of the individual tabs by clicking the checkboxes for those tabs.

After selecting the tabs you wish to have printed, clicking the **Okay** button opens the report in Adobe Acrobat Reader. Clicking on the **Print** button opens the *Print* window. Click on the **OK** button on the *Print* window to print the report. All selected information will be printed in a formatted report. Click on the **Close** button to return to the *Generate Report* window.



IV – The FAD Recording Process Using the FRS

The FRS provides a comprehensive view of FAD information that has been entered into CONNECTIONS, including home demographics, person detail and licensing information. In addition, the FRS is now the primary tool for the creation and updating of Home Study and Annual Reauthorization narratives, neither of which were previously captured in CONNECTIONS. The FRS is also used to record and manage Contacts information.

The introduction of the FRS involves some new procedures for accessing FAD information and creating and updating Home Study and Annual Reauthorization narratives.

This section will describe details concerning access to the FRS, using the FRS to complete a Home Study or Annual Reauthorization or enter Contacts information, and the events generated by this process.

As was described earlier, the FAD Task List now includes three tasks for accessing the FRS: **Home Study**, **Annual Reauthorization** and **View FAD Record Summary**.

1 - Home Study

- This task provides access for viewing information for the home and updating some of that information, as well as the ability to create and update Home Study narratives and Contacts information.

If you select the Home Study Task from the Task List...		
In the following circumstances...	Buttons Enabled	State of FRS
No Previous Home Study exists	New	FRS contains current data from database. Narratives and comment boxes are blank.
In-process Home Study exists	Detail	FRS contains current data from database. Narratives and comment boxes contain in-process version.
Approved/frozen Home Study exists	New *	FRS contains current data from database. Narratives and comment boxes are blank.
	Use Prior**	FRS contains current data from database. Narratives and comment boxes contain info from most recent saved FRS.

* Clicking **New** when a previous Home Study exists will produce the following message:

“Start with new (blank) narratives instead of those last saved?”

- Clicking **Continue** will retrieve the FRS with blank narratives. Clicking **Cancel** returns you to the *Task List*.
- ** This is a new button on the *Task List* window.
-

The FRS Initial Home Study Process

The initial Home Study is required as part of opening a home. To complete this task using the FRS:

1. Select **Home Study** on the FAD *Task List*. The **New** button will be enabled.
2. Clicking the **New** button opens a new FRS for the home. Data fields in the FRS will contain information drawn from the CONNECTIONS database. The Home Study and Annual Reauthorization narratives will contain blank templates. All comment boxes will be blank.
3. Click the **Home Study Narrative** tab.

4. On the left side of the tab, select Initial Home Study by clicking the checkbox.
 5. Click the **Save** button at the bottom of the list to save the Home Study Reason to the database.
 6. On the right side of the tab, select which narrative template you'll be using by clicking the appropriate checkbox. You can choose from the Standard and GPS/MAPP versions. The Agency Home Study is not available in this phase of implementation.
 7. Click the **Retrieve/Edit** button.
 8. A blank copy of the selected template will open. Enter your home study information into the narrative.
 9. Save and close the narrative as described in "Additional Features of the FRS" on page 48.
 10. Exit the FRS by clicking the **Close** button in the bottom right-hand corner of the FRS window.
 - Closing the FRS after creating an Initial Home Study will generate a Home Study event with a status of PROC. Selecting this event and clicking the **Detail** button on the *Event List* will access the FRS in view-only mode.
 - Once an in-process FRS (with its Initial Home Study) has been created (as described above), the home study can be completed in increments before it is "Save and Submit"-ed.

You can continue your work on that Home Study by selecting the **Home Study** task on the *Task List*, and clicking the **Detail** button. The "in-process" FRS will open with its narratives and comment boxes containing your last saved entries.
 - Accessing the FRS via the **View FAD Record Summary** task allows view-only access to the "in process" FRS.
 11. When you have completed the Home Study narrative and entered all other necessary information, initiate the submission of the Home Study to your unit supervisor by clicking the **Submit** button in the bottom left-hand corner of the *FRS* window.
 12. Clicking the **Submit** button opens the *Maintain License* window. Here you can make any other necessary changes to the home's licensing information. When these changes have been completed, you can:
 - Select *File > Save* and continue working, or
 - Change the home status to Pending Acceptance and Select *File > Save and Submit* to submit the home for supervisor approval. The Home Study event and the *Home License* window are bundled into a single submission for supervisor approval. A single To-Do task is generated.
-

13. Complete the To-Do window.

Note: When the FRS and Home Study have been “save and submit”-ed, the status of the Home Study and Home License events change from PROC to PEND.

Supervisor Approval

1. When a supervisor receives an approval To-Do for the FRS, selecting the approval To-Do and clicking the Navigate button in the *To-Do* window will open the FRS in view-only mode.
 - A supervisor can also view the FRS at any time in a browse only mode by navigating from the pending Home Study event or via the **View FAD Record Summary** task.
2. When the Home Study is approved:
 - The status of the Home Study event changes from PEND to APRV.
 - All information in the FRS is frozen. Selecting that Home Study event from the *Event List* and clicking the **Detail** button opens the frozen “Home Study” document in view-only mode for viewing or printing.
 - A Home License event with a status of APRV will be created.
 - An alert is sent to the worker reminding him/her that a current home certification or approval letter should be printed.

Note: If the supervisor rejects the pending approval, the status of the FRS event becomes REJT. The Description/Notes box on the To-Do Detail for the REJT event contains the reasons for the rejection. Accessing the FRS through the **Home Study** task opens the FRS, allowing the reasons for the supervisor’s rejection to be addressed.

The FRS Interim Home Study Process

The FRS Interim Home Study is conducted when the home has undergone any of the following changes that do not effect the home’s “from/to” certification dates:

- Change in Marital Status
- Change in Household Composition
- Change in Home Address
- Change in Capacity
- Change in Level of Care
- Change in Program Type
- Change in Age Range or Gender

- Criminal Records Results

Note: The Interim Home Study process replaces the Interim Reauthorization process that was previously performed in situations such as those listed above.

To complete this task using the FRS:

1. Select the Home Study task from the FAD *Task List*. If an approved/frozen Home Study exists (which should be the case if you are starting an Interim Home Study), both the **New** and **Use Prior** buttons will be enabled.
 - Clicking the **New** button will open the FRS with all data fields pre-filled with current information from the CONNECTIONS database. The Home Study and Reauthorization narratives will contain blank templates and all comment boxes will be blank. Information can be entered in the Home Study narrative and comment boxes.
 - Clicking the **Use Prior** button will open the FRS with all data fields pre-filled with current information from the CONNECTIONS database. The Home Study and Reauthorization narratives and all comment boxes will contain information from the latest approved/frozen FRS. The Home Study narrative and comment boxes can be modified or added to as necessary.
2. Click the **Home Study Narrative** tab.
3. On the left side of the tab, click the checkbox (or boxes) that correspond(s) with the reason(s) you are conducting the Interim study.
4. Click the **Save** button at the bottom of the list to save the Home Study Reason(s) to the database.
5. On the right side of the tab, select which narrative template you'll be using by clicking the appropriate checkbox. You can choose from the Standard and GPS/MAPP versions. The Agency Home Study is not available in this phase of implementation.
6. Click the **Retrieve/Edit** button.
 - If you entered the FRS by clicking the **New** button on the *Task List*, the Home Study will be blank, allowing you to start a new narrative.
 - If you entered the FRS by clicking the **Use Prior** button on the *Task List*, the latest approved/frozen Home Study will open. You can modify or add to it as necessary.
7. Enter your home study information into the narrative. Include an explanation of why the interim Home Study is being conducted.
 - Any previous Annual Reauthorization narrative is available in view-only mode for copying and pasting when completing a Home Study.

8. Save and close the narrative as described in “Additional Features of the FRS” on page 48.
9. Exit the FRS by clicking the **Close** button in the bottom right-hand corner of the FRS window.

- Closing the FRS after creating an Interim Home Study will generate a Home Study event with a status of PROC. Selecting this event and clicking the **Detail** button on the *Event List* will access the FRS in view-only mode.
- Once an in-process FRS (with its Interim Home Study) has been created (as described above), the home study can be completed in increments before it is “Save and Submit”-ed.

You can continue your work on that Home Study by selecting the **Home Study** task on the *Task List*, and clicking the **Detail** button. The “in-process” FRS will open with its narratives and comment boxes containing your last saved entries.

- Accessing the FRS via the **View FAD Record Summary** task allows view-only access to the “in process” FRS.
10. When you have completed the Home Study narrative and entered all other necessary information, initiate the submission of the Home Study to your unit supervisor by clicking the **Submit** button in the bottom left-hand corner of the *FRS* window.
 11. Clicking the **Submit** button opens the *Maintain License* window. Here you can make any other necessary changes to the home’s licensing information such as changing the home’s status to Pending Acceptance. When these changes have been completed, you can:
 - Select *File > Save* and continue working, or
 - Change the home status to Pending Acceptance and Select *File > Save and Submit* to submit the home for supervisor approval. The Home Study event and the *Home License* window are bundled into a single submission for supervisor approval. A single To-Do task is generated.
 12. Complete the To-Do window.

Note: When the FRS and Home Study have been “save and submit”-ed, the status of the Home Study and Home License events change from PROC to PEND.

Supervisor Approval

1. When a supervisor receives an approval To-Do for the FRS, selecting the approval To-Do and clicking the Navigate button in the *To-Do* window will open the FRS in view-only mode.
 - A supervisor can also view the FRS at any time in a browse only mode by navigating from the pending Home Study event or via the **View FAD Record Summary** task.
2. When the Home Study is approved:
 - The status of the Home Study event changes from PEND to APRV.
 - All information in the FRS is frozen. Selecting that Home Study event from the *Event List* and clicking the **Detail** button opens the frozen “Home Study” document in view-only mode for viewing or printing.
 - A Home License event with a status of APRV will be created.
 - An alert is sent to the worker reminding him/her that a current home certification or approval letter should be printed.

Note: If the supervisor rejects the pending approval, the status of the FRS event becomes REJT. The Description/Notes box on the To-Do Detail for the REJT event contains the reasons for the rejection. Accessing the FRS through the **Home Study** task opens the FRS, allowing the reasons for the supervisor’s rejection to be addressed.

•

Entering Contacts Information in the FRS

Contacts information should be continually entered and updated throughout the FAD process. To complete this task using the FRS:

1. Select Home Study on the FAD *Task List*.
2. You can use either the **New** or **Use Prior** buttons to open the FRS. The Contacts information will always contain all previously entered and saved information.
3. Click the **Contacts** tab.
4. If you are entering information about a new contact, click the **New** button. If you are updating information for a previous contact, click on the line of the grid representing that contact, then click the **Contact Detail** button. Clicking either button opens the *Contacts* sub-window.
5. Enter your information in the *Contacts* sub-window. Some information is entered by typing directly in fields. Other information is entered using checkboxes or drop-down lists.
6. Click the **Save** button to save your information to the database or click the **Cancel** button to return to the **Contacts** tab without saving your work.

7. Exit the FRS by clicking the **Close** button in the bottom right-hand corner of the *FRS* window.
 - If there was no in-process home study when you started this process, closing the FRS after entering Contacts information will generate a Home Study event with a status of PROC. Selecting this event and clicking the **Detail** button on the *Event List* will access the FRS in view-only mode.
 - Once an in-process FRS has been created (as described above), you can enter and update more contacts information by selecting the **Home Study** task on the *Task List*, and clicking the **Detail** button. The “in-process” FRS will open.
 - Accessing the FRS via the **View FAD Record Summary** task allows view-only access to the “in process” FRS.

Note: All contacts entered in the FRS are carried forward into subsequent FRSs. This provides a readily available comprehensive record of all contacts with the home.

2 - Annual Reauthorization

This task provides access for viewing information for the home and updating some of that information, as well as the ability to create and update Annual Reauthorization narratives. It replaces the Reauthorization task that previously appeared on the *Task List*.

Notes:

- The **Annual Reauthorization** Task is only available on the *Task List* during the 90 days prior to the home’s certification or approval due date. At all other times, all pushbuttons on the *Task List* are disabled when the **Annual Reauthorization** task is selected.
- If the FRS is accessed via the **Home Study** task (using the **Use Prior** button), the **Annual Reauthorization** tab will open the last saved Annual Reauthorization document in view-only mode.

The FRS Annual Reauthorization Process

The FRS Annual Reauthorization is conducted at the end of a home’s annual certification period or when the home has undergone any changes that affect the home’s “from/to” certification dates.

To complete this task using the FRS:

1. Select the **Annual Reauthorization** task from the FAD *Task List*. The button used to open the FRS from the *Task List* window and the state of the narratives and comment boxes will depend on the existence of previous or in-process Home Study and Reauthorization narratives. These dependencies are described in the following 2 charts:

If no in-process Home Study exists and you select the Annual Reauthorization Task from the Task List...		
In the following circumstances...	Buttons Enabled	State of FRS
No Previous Reauth exists	New	FRS contains current data from database. Narratives and comment boxes are blank.
In-process Reauth exists	Detail	FRS contains current data from database. Most recent saved Home Study narrative and comment boxes are opened. In-process Reauth narrative is opened.
Approved/frozen Reauth exists	New (A)	FRS contains current data from database. Most recent saved Home Study narrative and comment boxes are opened. Reauth narrative is blank.
	Use Prior (B)	FRS contains current data from database. Most recent saved narratives and comments boxes is opened.

(A) Clicking **New** when a previous Reauthorization exists will produce the following message:

“Start with new (blank) narratives instead of those last saved?”

- Although the plural is used, in this instance, this message refers **only** to the Reauthorization narrative.
- Clicking **Continue** will retrieve the FRS with a blank Reauthorization narrative. Clicking **Cancel** returns you to the *Task List*.

(B) This is a new button on the *Task List* window.

If an in-process Home Study exists and you select the Annual Reauthorization Task from the Task List...		
In the following circumstances...	Buttons Enabled	State of FRS
No Previous Reauth exists	Detail (A)	FRS contains current data from database. Most recent saved Home Study narrative is opened. Reauth narrative and comment boxes are blank.
Approved/frozen Reauth exists	Detail (B)	New (C) FRS contains current data from database. Most recent saved Home Study narrative is opened. Reauth narrative and comment boxes are blank.
		Use Prior (D) FRS contains current data from database. Most recent saved narratives and comments boxes is opened.

Note: You cannot have two simultaneous in-process FRSs. If there is an in-process Home study, an in-process Reauth cannot exist.

(A) Clicking the **Detail** button opens the following message:

“In-process Home Study exists and will be converted. Continue?”

- Clicking **Yes** will convert the in-process Home Study FRS to an Annual Reauthorization FRS. The FRS will open as described in the first row of the chart above.
- Clicking **No** will return you to the *Task List*. Since the in-process Home Study was not converted, you must complete, save, and submit the Home Study before being able to work on the Annual Reauthorization.

(B) Clicking the **Detail** button opens the following message:

“In-process Home Study exists and will be converted. Continue?”

- Clicking **Yes** will convert the in-process Home Study FRS to an Annual Reauthorization FRS. You will be returned to the Task List with the **New** and **Use Prior** buttons enabled. Which of these buttons you use to access the FRS determines how the FRS will open.
- Clicking **No** will return you to the *Task List*. Since the in-process Home Study was not converted, you must complete, save, and submit the Home Study before being able to work on the Annual Reauthorization.

(C) Clicking **New** when a previous Reauthorization exists will produce the following message:

“Start with new (blank) narratives instead of those last saved?”

- Although the plural is used, in this instance, this message refers **only** to the Reauthorization narrative.
- Clicking **Continue** will retrieve the FRS with a blank Reauthorization narrative. Clicking **Cancel** returns you to the *Task List*.

(D) This is a new button on the *Task List* window.

2. The FRS will open and the **Annual Reauthorization Narrative** tab will be active.
3. Although you will see choices for both an OCFS Standard Annual Reauthorization narrative and an Agency Annual Reauthorization, the latter choice is not available in this phase of implementation. The OCFS narrative will be automatically selected when the tab is opened.
4. Click the **Retrieve/Edit** button.
5. Enter new information or edit existing information in the narrative.
6. Save and close the narrative as described in “Additional Features of the FRS” on page 48.
7. Exit the FRS by clicking the **Close** button in the bottom right-hand corner of the FRS window.
8. Closing the FRS after creating an Annual Reauthorization will generate an Annual Reauthorization event with a status of PROC. Selecting this event and clicking the **Detail** button on the *Event List* will access the FRS in view-only mode.
 - Once an in-process FRS (with its Annual Reauthorization) has been created (as described above), you can continue your work on that Annual Reauthorization by selecting the **Annual Reauthorization** task on the *Task List*, and clicking the **Detail** button. The “in-process” FRS will open with its narratives and comment boxes containing your last saved entries.

- Accessing the FRS via the **View FAD Record Summary** task allows view-only access to the “in process” FRS.
9. When you have completed the Annual Reauthorization narrative and entered all other necessary information, initiate the submission of the Annual Reauthorization to your unit supervisor by clicking the **Submit** button in the bottom left-hand corner of the *FRS* window.
 10. Clicking the **Submit** button opens the *Home License* window. Here you can make any other necessary changes to the home’s licensing information such as changing the home’s status to Pending Acceptance.
 11. Be sure to click the **Reauthorization** checkbox on the *Home License* window.

The screenshot shows the 'F/A Home License' window for Sosa-Crosoft, Michelle. The window title bar includes 'File Edit Options Forms Help'. The main area contains several sections:

- Setting:** Foster Home (dropdown), **Facility Type:** Certified Foster Home (dropdown), **Status:** Accepted - Active (dropdown)
- Male Age Range Approved:** Min Year: 1, Month: (dropdown), Max Year: 4, Month: (dropdown), From Date: 03/06/2002, To Date: 03/06/2003
- Female Age Range Approved:** Min Year: 1, Month: (dropdown), Max Year: 4, Month: (dropdown)
- Renewal/Extension:** Reauthorization (highlighted with a red circle), Fingerprint Extension
- Placement Information:** Capacity: 2, Open Slots: 2, # Placements: 0, # Unavailable: (empty)
- Program Types:** A list box containing: HIV+/AIDS, Mother/Child, Emergency, Refugee Assistance Pgm, Regular, Hard to Place
- Cert./Approval Requirements:** Medical Dates Complete, Fingerprint Results Complete, On Hold
- Buttons: Save, Cancel

12. When these changes have been completed, you can:
 - Select *File > Save* and continue working, or
 - Change the home status to Pending Acceptance and Select *File > Save and Submit* to submit the home for supervisor approval. The Annual Reauthorization event and the *Home License* window are bundled into a single submission for supervisor approval. A single To-Do task is generated.
13. Complete the To-Do window.

Notes:

- Attempting to Save and Submit without clicking the **Reauthorization** checkbox will produce the following message:
“Check Reauthorization checkbox when submitting license for recertification.”

- When the FRS and Annual Reauthorization have been “save and submit”-ed, the status of the Annual Reauthorization and Home License events change from PROC to PEND.

Supervisor Approval

1. When a supervisor receives an approval To-Do for the FRS, selecting the approval To-Do and clicking the Navigate button in the *To-Do* window will open the FRS in view-only mode.
 - A supervisor can also view the FRS at any time in view-only mode by navigating from the pending Annual Reauthorization event or via the **View FAD Record Summary** task.
2. When the Annual Reauthorization is approved:
 - The status of the Annual Reauthorization event changes from PEND to APRV.
 - All information in the FRS is frozen. Selecting that Annual Reauthorization event from the *Event List* and clicking the **Detail** button opens the frozen Annual Reauthorization document in view-only mode for viewing or printing.
 - A Home License event with a status of APRV will be created.
 - The “From” and “To” dates on the *Home License* window update to reflect the new certification or authorization period.
 - An alert is sent to the worker reminding him/her that a current home certification or approval letter should be printed.

Note: If the supervisor rejects the pending approval, the status of the FRS event becomes REJT. The Description/Notes box on the To-Do Detail for the REJT event contains the reasons for the rejection. Accessing the FRS through the **Annual Reauthorization** task opens the FRS, allowing the reasons for the supervisor’s rejection to be addressed.

3 - View FAD Record Summary

This task provides view-only access to CONNECTIONS information for the home as well as any existing Home Study or Annual Reauthorization narratives.

Note: This task opens an in-process FRS in view-only mode.

If you select the View FAD Record Summary Task from the Task List...		
In the following circumstances...	Buttons Enabled	State of FRS
No FRS exists	None	This Task is only available when there is an in-process version of the FRS.
In-process FRS exists	Detail	FRS contains current data from database. Narratives and comment boxes contain latest saved version.

4 - Events Created by the FRS

The FRS process creates two navigable events: **Home Study** and **Annual Reauthorization**.

Note: These events provide view-only access to the FRS.

Conditions for status changes to these events are listed below:

Event has status listed at right when...	
You select a Home Study or Annual Reauthorization task from the <i>Task List</i> , and Enter and <u>save</u> information in FRS data fields, comment boxes, or one of the narratives, and Click the Close or Submit buttons.	PROC *
You select a Home Study or Annual Reauthorization task from the <i>Task List</i> , and Enter and <u>save</u> information in FRS data fields, comment boxes, or Home Study narrative, and Click the Submit button, and Save and Submit the <i>Home License</i> window, and Complete the <i>To-Do</i> window.	PEND *
Your supervisor approves the PEND event.	APRV **
Your supervisor rejects the PEND event.	REJT *

* PROC, PEND, and REJT events provide view-only access to that FRS.

** APRV events provide access to frozen Home Study or Annual Reauthorization documents for review or printing.

Note: When a home is system-closed any in-process FRS events are converted to a status of COMP. These events are converted back to PROC status if the home is re-opened. Data and narratives that were entered into the FRS before the system-closure are still available when the home is re-opened by clicking the **Detail** button on the *Task List*.

The format of the frozen Home Study and Annual Reauthorization Documents

Frozen Home Study and Annual Reauthorization documents are created when the FRS is approved. Frozen documents are associated with their approval events and can be printed at any time.

These documents are formatted in two parts:

Part 1 is the formal document, which is given to the foster parents.

Part 2 contains supporting information such as worker/contacts notes, supervisor comments, and the FAD checklist. This part is not given to the foster parents.

V – Additional Features of the FRS

Saving your work

One of the most valuable habits you can develop in relation to working with Word documents such as the Home Study and Annual Reauthorization narratives is to **save your work**. The CONNECTIONS Citrix servers will “time out” a connection to the system that has been idle for 30 minutes. Any narratives that are open will be closed down without saving, so only work you had saved will appear in the narrative the next time it is opened. To make sure that a document closed by a “time out” contains all the work you’ve done on it, be sure to save the narrative on which you are working if you are interrupted by a phone call or meeting. Also, be sure to periodically save while working on lengthy documents.

Remember, Word is set to periodically “AutoSave” your document. Every three minutes, your machine will automatically save whatever changes you’ve made to the document. These changes are made to an alternate copy of your document (known as an **autorecover** document) that is intended for use if your original document is damaged or lost. The autorecover document is a safety net. Do not depend on this function as the only protection for your work. If you need to access an autorecover document, contact the CONNECTIONS Helpdesk (**1-800-NYS-1323**).

The autorecover document will only be recoverable for 240 hours (10 calendar days), so it is important to call the Help Desk as soon as possible with information about what document you were working on and when you timed out.

The procedure for saving narratives in the FRS is very similar to that for the rest of CONNECTIONS:

1. Close the narrative using *File > Close* or the **Close** button.
2. You will see the following message:

“Save Changes?”

3. You can click the **Retrieve/Edit Narrative** button to reopen the narrative and continue working on the narrative.

When you close a narrative that you have accessed in view only mode, closing that document will not result in seeing these Save reminders.

Additional Features in Word

As you use the Word templates in the FRS to create the Home Study and Annual Reauthorization narratives, you will find that there are several features available in Word in the FRS that are not available when using word in CONNECTIONS.

Included among these new features are Spell Check, Grammar Check, and Auto-Correction. Spell Check will underline spelling errors in your document, allowing you to easily identify and correct them. Grammar Check will do the same for grammatical errors. Auto Correction will automatically correct common misspellings. For instance, if you mistakenly type “t-e-h”, Auto-Correction would automatically change it to “t-h-e” without you having to take any action.

Copy and Paste Guidelines

While the FRS now provides the primary mechanism for recording narratives such as the Home Study and Annual Reauthorization, there may be some instances in which you need to copy and paste information from other documents such as a Pre-Build 15 converted Home Study narrative found in CONNECTIONS or a locally created narrative that was created outside of CONNECTIONS. Additionally, you may need to copy and paste information from locally saved Word documents to one of the many comment boxes found in the FRS. However, there are some elements of Word documents, which are described below, that may affect your ability to successfully copy and paste information from one Word document to another.

The Home Study and Annual Reauthorization Word narratives located in either FRS or in CONNECTIONS prior to Build 15 are completed in templates. Templates can contain pre-formatted sections in which information is entered in designated text fields. Sections of a template can be protected or unprotected. If you’ve completed a Home Study narrative in a locally saved Word document, it may or may not be in the form of a template. If you are not sure, you can check with staff in your own district or agency to determine if the locally created document contains protected fields.

The unprotected areas on Word templates in CONNECTIONS are where you can enter information. These areas may display with a shaded background. In the Home Study narrative in the FRS, shading is a simple means for you to tell where information can be entered. You can click at the beginning of a shaded area and begin typing in your text.

Also, if text exists in a shaded area, you can copy and paste that text from one section to another.

The areas in Word templates that are protected serve as field labels and other instructional information. These areas of a Word template are not shaded. You cannot type over these areas, and copying and pasting these protected areas can prove problematic if not done properly.

To help prevent problems copying and pasting between documents, keep in mind the following:

- Whenever possible, type information directly in the Home Study and Annual Reauthorization templates contained in the FRS rather than creating these narratives outside of CONNECTIONS and copying and pasting from one document to another.
- If it is necessary to record information outside of the FRS, use a blank MS Word document when possible. Having a new Word document without pre-formatted fields and labels will make copying and pasting into the FRS narratives easier.

To Copy a Section of a CONNECTIONS Pre-Build 15 Converted Home Study or Reauthorization Narrative to the FRS.

1. Select the CONVERTED Home Study or Reauthorization Narrative from the *Event List*. The Description for the Event is “Converted Pre Build 15 Home Study.”
2. Click on the **Detail** button.
The Output Launch window displays.
3. Click on the **Document** button.
The Converted Narrative opens in Microsoft Word.
4. Highlight the section of the Home Study or Reauthorization Narrative that you wish to copy into the FRS Narrative. Be sure to highlight only the text that was previously entered by a user. Do not highlight the topic headings or instructions.
5. Click on the **Edit** drop-down menu and select “Copy.”
6. Click on the **File** drop-down menu and select “Close.”
7. Access the **Home Study** or **Reauthorization** tab in the FRS.
8. Scroll down to the section in the new Home Study or Reauthorization where you wish to enter the text.
9. Click in the Gray (update) area of this section.
10. Click the **Edit** drop-down menu and select “Paste.”
The text should appear in the appropriate section.

To Copy more than one Section of a CONNECTIONS Pre-Build 15 Converted Home Study or Reauthorization Narrative to the FRS.

To copy more than one text section of a CONNECTIONS Pre-Build 15 Converted Home Study narrative to the FRS, use Section XVII Other (Agency-Specific Items) as the location in the FRS Home Study narrative for pasting information. Keep in mind that a straight copy and paste will result in protected text from the CONNECTIONS narrative being protected in FRS after it is pasted. This makes the text difficult to work with and could clutter your FRS Home template with useless information. To avoid this problem, use the following method when copying and pasting from a CONNECTIONS Home Study narrative:

1. Select the CONVERTED Home Study from the *Event List*. The Description for the Event is “Converted Pre Build 15 Home Study.”
2. Click on the **Detail** button.
The Output Launch window displays.
3. Click on the **Document** button.
The Converted Narrative opens in Microsoft Word.
4. Highlight the portion of the Home Study that you wish to copy into the FRS Narrative.
5. Click on the **Edit** drop-down menu and select “Copy.”
6. Click on the **File** drop-down menu and select “Close.”
7. Access the **Home Study** tab in the FRS.
8. Scroll down to Section XVII.
9. Click in the Gray (update) area of Section XVII.
10. Click the Edit drop-down menu and select “Paste Special.”
Note: you may have to click the down-arrow at the bottom of the list to expose this selection.
11. Select “Unformatted Text.”
12. If there is extraneous information, such as instructions or topic headings that was brought into the new document with the original copy and paste operation, this material should no longer be protected and can be deleted from the document.

After a short time, your selected narrative text will paste into Section XVII of the FRS Home Study. All pasted text will now be editable. If desired, you can copy selected sections of the information from Section XVII of the FRS narrative into other sections of the FRS narrative to better organize your Home Study information. Any materials that are not needed in the new Home Study (e.g., old section headings) are no longer protected and can be deleted. To copy and paste into the new FRS Reauthorization document, you can follow the same steps and paste the material from the Pre Build 15 Reauthorization document into the end of the FRS document and copy selected portions of the information into appropriate sections of the new Reauthorization document.

To Copy information from a separate Microsoft Word document into the FRS

To copy information from a separate Microsoft Word document (e.g., a Home Study that was maintained outside of CONNECTIONS) into the FRS (**Home Study** tab), you can also use Section XVII of the FRS Home Study narrative as the location to paste the information. It is important to note that CONNECTIONS and the FRS are running in a Citrix session. To access your locally saved Home Study document, you will need to switch to your local desktop. To copy and paste from a locally saved Home Study Word narrative to the FRS Home Study narrative:

1. Switch to your local desktop by pressing down the **Alt** key and pressing the **Tab** key until your local desktop session appears.
2. Release the **Alt** and **Tab** keys.
3. Open Word on your local desktop and open the Home Study Word narrative.
4. Highlight the portion of the Home Study Word narrative that you wish to bring into the new Home Study. .
5. Click the **Edit** drop-down menu and select "Copy."
6. Switch back to your Citrix session by pressing down the Alt key and pressing the Tab key until the Citrix session appears
7. Release the **Alt** and **Tab** keys.
8. Access the Home Study in the FRS.
9. Scroll down to Section XVII.
10. Click in the Gray (update) area of Section XVII.
11. Click the Edit drop-down menu.
12. If you have no protected fields in the document you are copying, select Paste. If you do have protected fields, select Paste Special (Note: you may have to click the down-arrow at the bottom of the list to expose this selection).
13. If you have selected Paste Special, click Unformatted Text.

As with the copy and paste process from the CONNECTIONS Home Study narrative, after a short time, your selected Home Study narrative text will paste into Section XVII of the FRS Home Study. All pasted text will now be editable. If desired, you can copy selected sections of the information from Section XVII of the FRS narrative into other sections of the FRS narrative to better organize your Home Study information. If there is extraneous information, such as instructions or topic headings that was brought into the document with the original copy and paste operation, this material can be deleted from the document.

You can copy information from your own documents into FRS comment boxes, but remember that special formatting (e.g., tab sets, fonts, styles) will be lost when you

paste copied text into an FRS comment box. To avoid problems, keep the formatting of your source document as generic as possible.

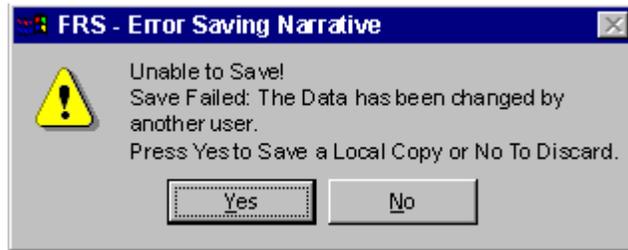
Modifying and Saving Documents with Enhanced Narrative Locking

The FRS utilizes a feature called Enhanced Narrative Locking to aid in the updating of the Home Study and Annual Reauthorization narratives as well as the Safety Assessment.

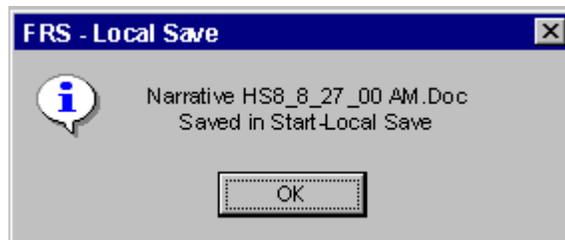
The purpose of Enhanced Narrative Locking is to allow workers to modify these documents with confidence that they will be able to save their work even if someone else was making their own separate modifications to that document at the same time.

As an example of this new functionality, assume that two workers are modifying the Home Study narrative of a home simultaneously and Worker A is the first to save her revisions. Under the old functionality, Worker B would see a message telling him that his save had failed and all his updates would be lost. He would then have to open the narrative document again and start his modifications over from scratch.

With Enhanced Narrative Locking, things work a little differently. Using the same example as above, when Worker B attempts to save his changes to the Home Study narrative after Worker A's modifications have been saved, Worker B will see the following message:



If Worker B clicks the **Yes** button, he will see the following message:



It is important to note what narrative and time are listed in this message box.

Using this information, Worker B can find and open the locally saved version of the Home Study he was unable to save to the FRS earlier.

To access the locally saved narrative:

1. Click the **Start** button in the Citrix window.
2. Select *Local Save* from the Start menu.



3. The *Local Save Documents* submenu will open. It contains a list of all documents that have been saved locally by the system.
4. Click on the title for the document you want to open.

From the locally saved version, Worker B can then select and copy the information he wants to include in the narrative. By returning to the **Home Study Narrative** tab of the FRS, Worker B can open the Home Study narrative. Instead of having to type all his revisions all over again, he can paste his changes into the narrative.

Note: The locally saved copy of your narrative will only be available for 240 hours (10 calendar days) from when the Enhanced Narrative Locking feature created it. It is important to copy and paste your work from this version into the FRS narrative as soon as possible.

The FRS Data Fix

In order to provide workers with access to existing Home Study narratives created before the introduction of the FRS, the following data fix will be performed when the FRS is implemented:

- Existing Home Study narratives for homes in Pending-Acceptance or Pending Emergency status will be placed into a Standard Home Study narrative in the FRS.
- An FRS event in PEND status will be created for the supervisor to navigate to in order to approve these narratives. A list of these homes will be generated and sent to districts and agencies at implementation.

- Existing Home Study narratives for homes in all other statuses will be stored as “Converted Events” on the *Event List*. Workers can access these narratives via those events and copy and paste the narrative information into the appropriate FRS narrative sections.