CONNECTIONS

NYS Office of Children and Family Services

CONNECTIONS Case Management (Build 18) Implementation Issues
Version 13~ 11/10/05

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A few notes...

Please note that as the implementation issues identified in this document are resolved, this document will be updated. Updates will be identified with both "version" numbers and dates. This version is an update to a document that was distributed on May 2, 2005. The contents of this document describe *Implementation Issues* (otherwise known as System Investigation Request or SIRS), as well as the actions users should take if they encounter the situations described. It should be noted that OCFS is working to address these Implementation Issues and decisions regarding the content of future Builds are made based on need.

Definitions of terms used in this document...

The *Users Affected* section identifies those individuals, by program area, who are impacted, *What is Affected* identifies the part of the application that is involved, the *Implementation Issue* section defines the "issue"/SIR needing resolution, the *Action to be Taken* section describes the "workarounds" that a user should follow in order to remedy the issue at this time, the *Status* section will be filled in when the issues have been fixed, and the *SIR #* section is an internal tracking number of that request.

<u>*Please note:*</u> The described "Action to be Taken" are not a permanent fix to the issue and are only intended to be used until the issue is fixed.

Other Reference Tools...

Other reference documents are available to aid users in their introduction and use of the CONNECTIONS application. Among those tools are the *CONNECTIONS Build 18 Release Notes*, **the** *CONNECTIONS System Build 18 Step-By-Step Guide*, as well as *Dynamic Help in CONNECTIONS*, which is actually within the CONNECTIONS application. Other tools of note can be found on the Implementation page and the Desk & Job Aid page of the *CONNECTIONS intranet*. Please note that the address to the site had recently changed. The site can be accessed using the following URL: *http://ocfs.state.nyenet/*. Another place where information about the application can be found is through Public Folders. The path to the *CONNECTIONS Public Folders* is: Public Folders>All Public Folders>dfa.state.ny.us>CONNECTIONS. *On-Site Field Support* staff will also be available to assist both local districts and voluntary agencies during the implementation of Build 18. These staff will be deployed two to three weeks before conversion and will be assigned to particular districts and voluntary agencies for the first several weeks following conversion.

General Information About Build 18...

Build 18 was deployed to the field on the weekend of February 28, 2005, however, until a local district's data is converted the CONNECTIONS users in the local district will not have converted cases on their workload. Information related to the functionality of Build 18 was updated, and distributed to users, on the following dates: March 17th , March 21st, March 31st, April 4th , May 2nd, June 6th, June 27th, July 18th, August 1st, August 15th, August 29th, September 12th , Septmeber 28th and October 24th. For your convenience these documents are located on the Implementation page of the CONNECTIONS intranet .

Reminders...

- If you have questions about local practice, policy or procedures, please review these procedures with your supervisor.

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- For all other CONNECTIONS related questions please contact the NYS OFT Enterprise Help Desk 1-800-697-1323.

- Any additional WMS processing anomalies or questions should be directed to the OCFS-IT Customer Support help line at 1-800-342-3727.
- BICS issues should be reported to the BICS hotline: 1-800-342-3010
  SSPS issues should be reported to Nancy Pare: 212-383-1382 or Maureen Godwin: 212-383-2483.

Users Affected	What is Affected	Implementation Issues	Action to be Taken	Status	SIR
SCR	Intake	Unable to merge a new CPS intake to an open FSI stage when it is linked to either an open or closed CPS INV stage. When the intake is categorized as ADD INFO it is unable to be recorded in CONNECTIONS.	In the case of a subsequent report the SCR will transmit the case as Initial and note in the misc. area the case number of the case that did not allow the merge. In the case of an ADD INFO, the SCR will contact the district and give the information verbally.	*NEW*	*3283*
All	Progress Notes	Unable to Add Progress Notes when more than 400 progress notes exist in a case. The message "Secure ProgNote.clsSecureBPAccess.SecureRefreshProgressNotes Failed" is returned.	For viewing or entering a new note, users must enter a range of dates in the search criteria that returns less than 400 entries. It is recommended that users enter the 30 days proceding the current date.	*NEW*	*3057*
All	Progress Notes	Unable to Print beyond the last note displayed on the page when there are more than 400 progress note entries.	For Printing, users must enter a range of dates in the search criteria which returns 400 or less entries and should check that the last entry contains all notes entered on the last date in the selected range. Once these notes have been printed the user must then enter a new range of dates beginning with the day following the previous date range. This procedure should continue until all notes in a case are printed. i.e. 5/3/05-10/1/05 (returns 396 entries with all notes entered on 10/1/05 returned) next date range is 10/2/05 –11/18/05 (returns 47 entries)	*NEW*	*3057*
Historical Case Manager	Closed FASP	When attempting to view or print a completed FASP from a closed case, users are attempting to access the FASP from the tree.	The FASP cannot be viewed from the FASP tree for closed cases by design. Users must go through the Event List to view or print an approved FASP on a closed case. To access the approved FASP's, complete an Event Search to find the FASP events and then select the FASP Submitted for Approval event in the returned list to view each approved FASP in a case.		*N/A* *FYI*

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Users Affected	What is Affected	Implementation Issues	Action to be Taken	Status	SIR
Case Planner	Check FASP Detail	In the Check FASP Detail list of incomplete components the Case Planner Summary is not identified as being incomplete by node and tab. The Case Planner Summary appears on the following nodes and tabs: ➔Family Update/Case Update tab ➔Assessment Analysis/ Family View/Child View tab ➔Assessment Analysis/Behavioral Concerns and Contributing Factors tab ➔Assessment Analysis/Strengths tab ➔Assessment Analysis/Needed Improvements/Changes tab ➔Service Plan/Family Involvement pushbutton	An enhancement SIR has been submitted to identify the Case Planner Summary in the list of incomplete components. In the interim, the Case Planner should look at the Case Planner Summary checkbox on the tabs within the node to determine if the Case Planner Summary has been completed. If the checkbox is not checked, the CP must launch the CP Summary and save.		*3511*
Case Planner	FASP	Users have reported that they are unable to submit a completed FASP for approval even though all required FASP components are complete, a CID has been established., and the user is the Case Planner or Case Manager for the stage.	An enhancement sir has been submitted to display a message notifying the user that the FASP due date is more than 30 days from today and referring them to the Service Plan Review tab for the due date of the In Process FASP. In the interim, Check that: a. all required FASP components are complete and a CID has been established. b. user is the Case Planner or Case Manager for the stage. c. the FASP due date is 30 days or less from today's date (The In Process FASP due date can be identified on the Service Plan Review tab of the FSS stage.)		*3508*
Case Planner	FASP and PA	When recording the closing of the FSS through a Plan Amendment or within the FASP, the system is looking for one active O&A Block before the Plan Amendment or FASP can be submitted for approval. If the Case Planner marks the status of all the O&A Blocks as "Achieved" or "Discontinued", the FASP or PA is not able to be submitted for approval. This SIR will allow the FASP to be submitted when the O & A blocks are all "Achieved" or "Discontinued".	The Case Planner should keep one of the O&A Blocks as "Retained" or "Modified" or "New" (Close case). The Case Planner should note the achievement status in a Progress Note or as a response in a Case Closing question in that portion of the Service Plan.		*3335*

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Case Planner	SPR	When saving the invitees for an SPR, the list of invitees disappears. In addition, the outside participant push button does not enable until the other invitees are saved.	After saving the invitees, users must close out of the window. Users must then select the SPR activity then go to the SPR Detail in order to have the SPR scheduling tab information on the same SPR detail as the invitees. Once that is complete, the user must save, close out and select the same SPR activity again and go to the SPR Detail to have the invitees, the outside partcipant invitees and the SPR schedule information all in one SPR activity.		*3280*
Case Planner	SPR	SPR Invitees list for Worker does not include the role of CPS Worker/Monitor.	Case Planner should add the CPS Worker/Monitor in the Outside Participants field.		*3279*
Case Planner	FASP Service Plan	FASP can be submitted without the Family Involvement Case Planner Summary being launched in the Service Plan. Family Involvement in the Service Plan is required.	Case Planner should enter the families involvement with case planning in the Family Involvement Case Planner Summary before submitting a FASP for approval.		*3278*
All	Map Info	When validating addresses which are OUT OF STATE, the County field is blank. Since the County field is required to SAVE and ASSIGN user receives an error message.	User must select OUT OF STATE from the drop-down list to complete the validation. If the out of state address cannot be validated a message is returned that says *"Unable to validate address. Change address or Save if known to be correct."*		*3276*
Case Manager	CCR	Case Managers are unable to add the infant child of a child in a CCR to the case as a CCR is only allowed to contain one child.	In order to make 8D payments in WMS, the case needs to be closed as a CCR and opened as a CWS. The teen mom would still be recorded as the tracked child in the CWS but , since FASP questions regarding adoption milestones do not appear on the CWS stage, progress note entries are currently the only means to capture this information. In Build 19, the untracked child of a minor freed parent in foster care will be accommodated in the CCR, allowing 8D payments and appropriate FASP adoption milestone questions to be answered.		*3113*
Intake worker	FSI	When a supervisor attempts to split (create two or more cases) an FSI from the workers workload the resulting cases do not appear on either the worker's workload or the supervisor's workload. A case or stage search results in no matches found. A person search displays the case and the Case List can be accessed. When the Case Summary is selected from the Case List a Data Access error occurs.	The FSI should be reassigned to the Supervisor prior to splitting the FSI. Once the cases are split they may be reassigned as needed.		*3083*

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Case Planner/ Case Manager	FASP Visiting Plan	Primary Location, Frequency, Duration and Visiting Plan Status fields are not highlighted in yellow to show they are required for completion of the Visiting Plan Tab.	Users must select information from the drop down fields for Primary Location, Frequency, Duration and Visiting Plan Status to complete the visiting plan.		*3033*
Case Manager/ WMS Data Entry Operator	FSS	Cases from CONNECTIONS are going over to WMS with the incorrect start date.	The WMS start date is being pulled from the earliest of four dates in the FASP tab. The user must enter the trigger dates (date of placement,date of court order or date of application) (date of indication is system generated) prior to selecting the App Reg pushbutton. If users App Reg without filling in one of those CID trigger dates, CONNECTIONS will use the FSS stage creation date as the "default" CID. If the CID is changed after App Reg but before full data entry, the WMS case open date will change to the newly entered CID date.		*3028*
Case Manager/ WMS Data Entry Operator	WMS and FSS	A transaction is sent to WMS to update a case resulting in a pending status in WMS. While the first transaction is pending the CONNECTIONS case is subsequently closed. Closing the CONNECTIONS case changes the CCRS indicator on the pending record in WMS to 'Y'. The pending transaction in WMS is then cancelled, the CCRS indicator reverts back to the indicator it had before the first transaction was sent. As a result the case in WMS cannot be closed.	Users should check the status of the WMS case before closing a case in CONNECTIONS. WMS must be in a NO PEND status. If the WMS case has any outstanding transactions these transactions must be completed, cancelled or cases in error status must be corrected to put the case in a NO PEND status before the CONNECTIONS case is closed.		*2964*
Case Manager/ Case Planner	FSS Finalize Adoption Window	An error is generated on the Finalize Adoption window when the middle name is over 12 characters.	Users should insert the middle name with twelve or less characters.		*2808*
WMS Data Entry Operator/ Case Manager	WMS Interface	Case was closed in CONNECTIONS and does not allow the user to close the case in WMS.	If a case is closed in CONNECTIONS and districts are unable to process the WMS case closing, users should report these occurrences to the OFT Enterprise Help Desk at **1-800-697-1323** to process the request to change the CCRS indicator to complete case closing.		*2805*

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Case Manager/ Case Planner	Family Relation-ship Matrix (FRM)	When attempting to launch the Initial FASP an error message is received that the Relationship Matrix is incomplete, but the user has already completed the relationship matrix.	If this occurs the user should perform zero maintenance, such as: highlight a complete relationship and select the Modify push button, re-enter the relationship, select the Add push button, then Save.		*2787*
All	FSS Reports	Family Services OCI Report is including FASPs that are unavailable for launch.	No action is necessary by the user. Disregard these entries in the OCI report.		*2706*
CPS Worker	FASP	The system generated FASP Due Date is incorrect. When no other CID trigger date exists, the FASP in an FSS/CWS stage, which was created from within a CPS INV, has a due date of 30 days from stage creation. The INV conclusion was approved and the CID is set but the FASP due date did not change.	Users need to complete the initial FASP 7 days from the date of indication (INV conclusion approved). This would only change to 30 days if the worker had entered a placement date, a court order date or a date of application, which preceded the date of indication.		*2656*
All	FASP – Assess-ment Summary	Some Safety Factors do not display correctly in the Assessment Summary report.	Users should compare safety factors that display in the Safety Assessment to safety factors that display on the Assessment Summary report, to check that all relevant safety factors are being considered in developing the Service Plan.		*2599*
WMS Data Entry Operator/ Case Manager	WMS	When using Attachmate to access WMS and a data entry error is made, users receive the message, "Examine Blinking Fields". The error field is highlighted however, it does not blink.	Examine highlighted field and make changes as necessary.		*2587*
All	To Do Detail	The system does not pre-fill stage name and case ID on user generated ToDo's. Those fields are blank on the Staff ToDo list and only display under descriptive field.	The initiator of the ToDo must know the correct case and type the case number and name in the short description field. Users may create a To-Do with the case name and number by highlighting an existing To-Do for that case and selecting 'File' and 'New Using'. This will create a To-Do with the Ids and names.		*1331*