

CONNECTIONS Tip Sheet

Build 17 Progress Notes Instructions

Progress Notes Instructions added in Build 17

With the implementation of Build 17, New York City workers can view progress notes instructions. This is an optional feature available to participating districts across the state.

These instructions support the collection of all pertinent progress notes information in the Progress Notes narrative.

Instructions are displayed by selecting the **Show Instructions** button or the **Show Instructions** command in the **Options** menu. Instructions are displayed in the top half of the *Progress Notes Detail* window allowing workers to see the instructions while writing the progress notes narrative.

Who can see Progress Notes Instructions?

Only workers creating a new note or modifying an existing note will see the instructions. Instructions are displayed in the CPS Investigation Stage to the following workers:

- Any assigned worker with a role in the stage
- Any worker in the assigned worker's hierarchy
- Any worker with the Business Function of Enter Progress Note
- Any worker entering a finalized (frozen) progress note to add an addendum
- Any worker assigned a Progress Note To-Do

Navigation to Progress Notes Instructions

1. Select a CPS Investigation Stage from the *Assigned Workload*.
2. Select the **Tasks** button.
The Task List displays.
3. Select the Child Protective Record Summary (CPRS) from the Task List.
4. Select the **Detail** button.
The CPRS displays.
5. Select the **Progress Notes** tab.
The Progress Notes Detail window displays.
6. When creating a new note, enter type, method, and purpose information in the *Progress Notes Detail* window.
The Show Instructions button is enabled at the bottom of the Progress Notes Detail window.

Note: When modifying a draft note, if the type, method and purpose information has been entered, the Show Instructions button is enabled at the bottom of the Progress Notes Detail window.

Note: When type is Summary or Supervisor/Managerial Review, method and purpose are NOT required to enable Show Instructions.

Progress Notes Instructions window operation

- Select the **Show Instructions** button.
The Show Instructions window appears over the top half of the Progress Notes Detail window and displays the appropriate instructions. The Show Instructions button is replaced by the Hide Instructions button.
- Select the **Hide Instructions** button.
The Show Instructions window disappears and focus returns to the Progress Notes Detail window. The Hide Instructions button is replaced by the Show Instructions button.

What if the Show Instructions button is not visible on the Progress Notes Detail window?

If the **Show Instructions** button does not appear in the *Progress Notes Detail* window, check to see that the following conditions are met:

- You have entered the *Progress Notes Detail* window in create new or modify mode. **Show Instructions** button will not appear when entering in view only mode.
- You have a role in the stage or the Business Function of Enter Progress Note.
- Your local district has submitted instructions to OCFS/CONNECTIONS for approval.
- These local district instructions have been entered into the Progress Notes Instructions Matrix table in CONNECTIONS.

What if the Show Instructions button displays in the Progress Notes Detail window but is not enabled?

If the **Show Instructions** button appears but is not enabled, check to see that selections have been made in the *Progress Notes Detail* window in the following fields:

- Type of progress note
- Method of contact
- Purpose of progress note

These fields must have information either pre-filled or entered by the worker before the **Show Instructions** button is enabled.

Note: When type is Summary or Supervisor/Managerial Review, method and purpose are NOT required to enable Show Instructions.

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

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