CONNECTIONS
Step-by-Step Guide

Data Maintenance
for FAD Workers

CONNECTIONS Training Project
SUNY Training Strategies Group

Data Maintenance
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Introduction

As a CONNECTIONS user, you are contributing to New York State's child welfare data management system. Timely record keeping and documentation is an essential part of maintaining an accurate and reliable database. This guide is meant to provide detailed instructions for updating or correcting information contained in CONNECTIONS as soon as possible.

The Content of this Guide

This guide contains step-by-step instructions for accomplishing necessary updates or changes in CONNECTIONS, introductory remarks that provide a work context for these tasks, and hints for carrying out these tasks efficiently and effectively.

The last section of this guide contains hands-on practice exercises for you to use with the Training Database to reinforce your CONNECTIONS skills. These exercises cover key CONNECTIONS activities you perform as a FAD caseworker.

> **Note:**
> Any visible identifying data
> in this guide is simulated.

Features of this Guide

Two features of this guide help you quickly identify the information you need:

- **Tips**, set apart in margin boxes, provide information to help you carry out CONNECTIONS tasks efficiently and effectively. Icons in the boxes help focus your attention on three kinds of tips:

  Bright ideas

  Helpful hints

  Things to watch out for

- **Subdivided Instructions:** The step-by-step instructions for each procedure are subdivided into major sub-steps to make it easier to jump ahead to the correct step if you're already on the window you need to access. After the initial instructions on how to sign on to the system and access CONNECTIONS, step-by-step instructions assume you have accessed the CONNECTIONS Toolbar.

  We hope you find this to be a useful aid in your FAD work!

Using the Training Database with this Guide

You can use this guide in two ways: as a training tool to develop new skills; and as a resource for your daily work in CONNECTIONS. In either case, we suggest that you use this guide while working directly in CONNECTIONS Production or in the Training Database.

What is the Training Database?

The Training Database provides a safe environment for workers to learn and practice CONNECTIONS skills using simulated case data. The SUNY Training Strategies Group acts as the custodian for the Training Database sign-on IDs. These ID numbers are referred to as Desktop User (DU) numbers and Instructor Led (IL) numbers. Sign-on numbers begin with either DU or IL, and are followed by four digits. With a DU number a local district or voluntary agency staff member can sign on to the Training Database and practice using CONNECTIONS functionality that mirrors the CONNECTIONS Production system.

The Training Database has the look and feel of the CONNECTIONS system currently in production. When you sign on to the Training Database using a DU number, you will see a simulated environment displaying the *Assigned Workload* of a fictitious worker, Darryl Wilson. Darryl Wilson has been assigned several stages of service, including Foster and Adoptive Homes (FAD stages). These stages have been created specifically for training purposes. In the New York City training labs, you will use IL numbers, which display the *Assigned Workload* for a fictitious worker named Jamie Miller.

When you sign on as Darryl Wilson or Jamie Miller, you have the ability to complete the tasks necessary to maintain a FAD home. The Training Database also has common functions, such as Person Search, Resource Search and a *Staff To-Do List*.

Darryl Wilson also has the ability to access the workload of his supervisor, Sally May. Jamie Miller has the ability to access the workload of his supervisor, Cassie Landers. You may approve work submitted by Darryl Wilson by opening Sally May's *Staff To-Do List* and completing related approval tasks. Opening Cassie Landers' *Staff To-Do List* and completing the related approval tasks approves the work submitted by Jamie Miller.

Information is deleted when the computer system is refreshed each night; any data you enter into the system is available to you only until the end of that day.

Lending Procedures for Training Database DU Numbers

SUNY Training Strategies Group is responsible for lending DU numbers to voluntary agencies and local districts. Agencies and districts can use these DU numbers to train new workers and to allow experienced workers to practice new skills.

The procedure for obtaining DU numbers is outlined below:

- Local districts and voluntary agencies are encouraged to identify one person from each agency who is designated to have the authority to request DU numbers.

- The designated person should call 1-877-451-4835 and ask to borrow DU number(s) for a specific period of time.

- DU numbers can be borrowed for up to three weeks at a time; a maximum of four DU numbers may be borrowed per order.

- The following information is needed at the time of the request:

    ◊ Borrower's name
    ◊ Borrower's agency/facility
    ◊ Telephone number
    ◊ Start date for use of DU number(s)
    ◊ Expiration date
    ◊ Purpose of the request

- The caller will be provided **by e-mail** with the requested number of DUs and a password for each DU number assigned.

- Once you have received DU numbers, follow the directions below to access the CONNECTIONS Training Database.

Logging On to Your PC

The CONNECTIONS application can be accessed only by designated individuals on computers that are set up to run the application. Some CONNECTIONS computers use the Windows NT 3.51 operating system, while newer CONNECTIONS computers use Windows 2000. This section addresses the procedures for logging on to both of these operating systems.

Once you have completed logging on to Windows, the step-by-step instructions in the next section will show you how to access CONNECTIONS.

	Step-by-Step: **Logging On to the Windows NT 3.51 Operating System**

1   Press the **Ctrl** + **Alt** + **Delete** keys on your keyboard at the same time.
    A Confidentiality warning displays.

2   Click on the **OK** button in response to the Confidentiality warning.
    The Log On window displays.

3   Enter your user name in the **Username** field.

4   The **From** field ("domain") is pre-filled. To change the domain, click on the drop-down arrow and select from the resulting list.

5   Tab to the **Password** field and enter your password.
    This field is case sensitive.

6   Click on the **OK** button.
    The Program Manager window displays for your local desktop.

	Step-by-Step: **Logging On to the Windows 2000 Operating System**

1   Press the **Ctrl** + **Alt** + **Delete** keys on your keyboard at the same time.
    A Confidentiality warning displays.

2   Click on the **OK** button in response to the Confidentiality warning.
    The Log On window displays. Make sure that your user name and domain are listed correctly in the log on dialog box.

3   Enter *your* password and click on the **OK** button.
    Your Windows 2000 local desktop displays.

Accessing CONNECTIONS

The CONNECTIONS application is made available to users in three different ways:

Production Database	The Production Database contains "live" data. This is the database that all workers use to record information in CONNECTIONS.
Training Database	The Training Database contains simulated data and allows you to practice functions necessary for your casework activities. It mirrors the functionality of the Production Database. *(See "Using the Training Database with this Guide" on page 3 for more information.)*
Preview Application	The Preview Application contains a "snapshot" of actual case data. Information entered into the Preview application **does not** carry over to the Production database.
	The Preview Application provides the opportunity to preview changes and enhancements planned for the CONNECTIONS system. The Preview Application is available for a limited time when changes to the system are made. You will receive special notice when the Preview application becomes available.

You cannot have more than one of these applications open at the same time.

To distinguish between the Training Database and the Preview Application, keep in mind that the Training Database contains simulated data, while the Preview Application is a "snapshot" of actual case data. The Training Database allows you to practice functions necessary for your casework activities. Information entered into the Preview Application **does not** carry over to the Production database.

Using the CONNECTIONS Production database, you can access your *Assigned Workload* from any CONNECTIONS workstation throughout New York State. All you need is a valid User ID and password to gain access to your workload.

If the *AutoComplete* window displays during the logon process,
select the **Don't offer to remember any more passwords**
check box and click on the **No** button.

	Step-by-Step: **Launching CONNECTIONS (Production)**

1 Double-click the **Logon to Connections Production** icon.
A Microsoft Internet Explorer window displays containing the Logon dialog box for Citrix.

2 Enter your User Name in the **Username** field.
This field is pre-filled with information entered by the last person who used this computer.

3 Enter *your* password in the **Password** field.
This field is case sensitive.

4 Enter the appropriate domain in the **Domain** field.
This field is pre-filled with information entered by the last person who used this computer.

5 Click on the **Logon** button.
A File Download Progress box displays, followed by a Confidentiality Warning message box.

6 Click on the **OK** button.
The Citrix desktop displays and your Citrix session begins.

> If your CONNECTIONS computer runs the Windows NT 3.51 operating system, replace **Step 1** at left with these steps:
>
> **1** Double-click the CONNECTIONS Logon icon in the Windows Program Manager.
> *The CONNECTIONS Logon Program Group displays.*
>
> **1a** Double-click the Logon for CONNECTIONS Production icon.
> *A Microsoft Internet Explorer window displays, containing the Logon dialog box for Citrix.*

This Citrix desktop covers your local desktop and remains open for the length of your Citrix session. Citrix uses Windows 2000; if your PC runs Windows NT 3.51, the Citrix desktop looks quite different from your local desktop. The Citrix desktop also has an easily recognizable background.

On the Citrix desktop, program icons appear directly on the desktop, rather than in Program Group windows (as on your local desktop, if your computer runs Windows NT 3.51). Double-clicking an icon starts the application represented by that icon, opening a window on your desktop for that application.

> If you incorrectly enter your password, the following message displays:
>
> *"There was an error generating your application list: the Citrix Server reported that the Credentials entered were incorrect."*
>
> Re-enter your password and click on the **Logon** button.

The **Task Bar** at the bottom of the Citrix desktop provides a method of organizing the application windows that you have open in Citrix. You can have more than one window open on your desktop at a time. Minimize a window by clicking on the **Minimize** button (⬍). The minimized window displays as a button on the Task Bar. This makes room for other windows you need to use at that moment. To re-open an application, click on its button on the Task Bar; the application displays as the active window, placing it "on top of" any other open windows.

Clicking on the **Start** button (in the lower left corner of the Citrix desktop) displays the **Start** menu, which provides access to the *Citrix Log Off* procedure. (See page 11 for details about this procedure.)

Within Citrix, the Windows 2000 system consisting of desktop icons, the **Start** menu and the **Task Bar,** replaces the Program Manager and Program Group system of program management found on CONNECTIONS PCs using Windows NT 3.51.

> Windows NT 3.51 PCs display scroll bars on the bottom and right side of the screen; these scroll bars allow you to access the small portions of the desktop not visible when the Citrix desktop first opens.

When you log on to Citrix via the **CONNECTIONS Production Database** icon on the local desktop, three icons display on the Citrix desktop:
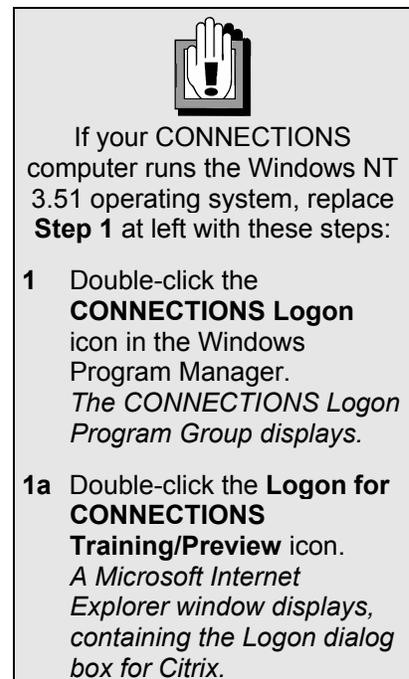
- CONNECTIONS Production
- CIN/PID (Data Warehouse; limited to designated users)
- Policy Library

Double-clicking an icon opens its corresponding application.
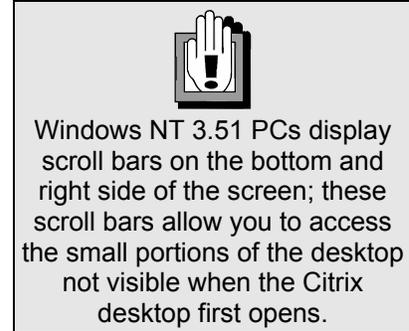
Step-by-Step:
Launching CONNECTIONS (Training Database)

1 Double-click the **Logon to Connections Training/Preview** icon.
The Citrix Logon dialog box displays in Microsoft Internet Explorer.

2 Enter a training user name (DU or IL#) in the **Username** field.
This field is pre-filled with information entered by the last person who used this computer.

3 Enter the same training user name (DU or IL#) in ALL CAPS in the **Password** field.
This field is case sensitive.

4 Enter the appropriate domain in the **Domain** field.
*This field is pre-filled with information entered by the last person who used this computer. If you are unable to logon using the NYSDSSNYC domain, enter NYSDSSALB in the **Domain** field.*

5 Click on the **Logon** button.
A File Download Progress box displays, followed by a Confidentiality Warning message box.

> If your CONNECTIONS computer runs the Windows NT 3.51 operating system, replace **Step 1** at left with these steps:
>
> **1** Double-click the **CONNECTIONS Logon** icon in the Windows Program Manager.
> *The CONNECTIONS Logon Program Group displays.*
>
> **1a** Double-click the **Logon for CONNECTIONS Training/Preview** icon.
> *A Microsoft Internet Explorer window displays, containing the Logon dialog box for Citrix.*

6 Click on the **OK** button in response to the confidentiality warning message.
*The Citrix desktop displays and your Citrix session begins. (For detailed information about Citrix, see page 7.) When you sign on using the **Logon for CONNECTIONS Training/Preview** icon, three icons display on the Citrix desktop:*

- *CONNECTIONS Training*
- *CONNECTIONS Preview*
- *Policy Library*

7 Double-click the **CONNECTIONS Training** icon on the Citrix desktop.
When the CONNECTIONS Training Database has launched successfully, the CONNECTIONS Toolbar displays. In the title bar, the DU number you entered displays as the fictional caseworker Darryl Wilson with the same ending digits, not counting zeroes (e.g., DU0123 displays as Wilson123,Darryl). If you entered an IL number, the title bar displays the name of the fictional caseworker Jamie Miller.

> If you incorrectly enter your password, the following message displays:
>
> *"There was an error generating your application list: the Citrix Server reported that the Credentials entered were incorrect."*
>
> Re-enter your password and click on the **Logon** button.

Step-by-Step:
Launching CONNECTIONS (Preview Application)

1 Double-click the **Logon to Connections Training/Preview** icon.
The Citrix Logon dialog box displays in Microsoft Internet Explorer.

2 Enter *your* user name in the **Username** field.
This field is pre-filled with information entered by the last person who used this computer.

3 Enter *your* password in the **Password** field.
This field is case sensitive.

4 Enter **NYSDSSNYC** in the **Domain** field.
*This field is pre-filled with information entered by the last person who used this computer. If you are unable to logon using this domain, enter NYSDSSALB in the **Domain** field.*

5 Click on the **Logon** button.
A File Download Progress box displays, followed by a Confidentiality Warning message box.

> If your CONNECTIONS computer runs the Windows NT 3.51 operating system, replace **Step 1** at left with these steps:
>
> **1** Double-click the **CONNECTIONS Logon** icon in the Windows Program Manager.
> *The CONNECTIONS Logon Program Group displays.*
>
> **1a** Double-click the **Logon for CONNECTIONS Training/Preview** icon.
> *A Microsoft Internet Explorer window displays, containing the Logon dialog box for Citrix.*

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6 Click on the **OK** button in response to the confidentiality warning message.
*The Citrix desktop displays and your Citrix session begins. (For detailed information about Citrix, see page 7.) When you sign on using the **Logon for CONNECTIONS Training/Preview** icon, three icons display on the Citrix desktop:*

- *CONNECTIONS Training*
- *CONNECTIONS Preview*
- *Policy Library*

If you incorrectly enter your password, the following message displays:

"There was an error generating your application list: the Citrix Server reported that the Credentials entered were incorrect."

Re-enter your password and click on the **Logon** button.

7 Double-click the **CONNECTIONS Preview** icon on the Citrix desktop.
When the CONNECTIONS Preview Application has launched successfully, the CONNECTIONS Toolbar displays. The title bar reads, "CONNECTIONS Preview - <Your Name>."

Closing CONNECTIONS and Logging Off Your PC

When you have finished your work in CONNECTIONS, you should close *both* CONNECTIONS and your Citrix session. This is best done as a two-step process: first close CONNECTIONS, then log off of Citrix. Doing so (as opposed to logging off of Citrix while CONNECTIONS is still open) reduces the likelihood of problems occurring during the log off procedure.

At the end of your work day, it is important to *log off* your PC; if you completely shut down (turn off) your computer, it will not be able to receive any updates that may occur overnight. Leaving the computer logged off (but with the power still on) will enable it to receive these updates.

The step-by-step instructions below will assist you in closing CONNECTIONS and logging off of your PC.

	Step-by-Step:
	Closing CONNECTIONS and Logging Off Your PC

1   Clicking on the **File** menu (represented by the **Globe** icon [ ] in the upper left corner of the CONNECTIONS Toolbar) and select **Close**.

   —OR—

   Click on the **Close** button ( ) in the upper right corner of the CONNECTIONS Toolbar.
   You may need to use the vertical scroll bar to scroll up on the desktop to reveal the Globe icon (File menu) on the CONNECTIONS Toolbar.

2   Click on the **Start** button in the lower left corner of the Citrix desktop and select **Log Off <User name>** from the resulting menu.
   The Log Off dialog box displays.

3   Click on the **Yes** button.
   This does not log off your machine; it only ends your session with the Citrix server.
   Your local desktop displays.

4   Close all applications still open on your local desktop.

5 Click on the **Start** button.
The Start menu displays.

6 Click on the **Log off <user name>** command.
The Shutdown Windows dialog box displays. If necessary, click on the drop-down arrow and select ***Log off <user name>***.

7 Click on the **OK** button.

If your CONNECTIONS computer runs the Windows NT 3.51 operating system, replace **Steps 5-7** at left with these steps:

1 Click on the **File** menu and select **Shutdown**.
The Shutdown Computer dialog box displays.

2 Click on **Log off <user name>**.

3 Click on the **OK** button.

CONNECTIONS Security

In order to protect the confidentiality and integrity of case data, access to information in CONNECTIONS is carefully controlled. A number of factors determine the information a worker can view or maintain in CONNECTIONS, including the worker's job function, the cases to which the worker is assigned and the worker's Business Function Profile (BFP).

All CONNECTIONS users receive security profiles which determine the windows or types of information they can open and view, as well as which windows they can modify or "maintain." In CONNECTIONS, each person's security profile is called a Business Function Profile (BFP). Each worker has only one BFP. Each BFP is comprised of one or more Business Functions. Your BFP is based on the tasks you are responsible for performing and the level of access to records needed to complete those tasks. Your BFP may multiple business functions based on your responsibilities.

What you are able to view and the tasks you are able to perform in the Training Database may not mirror what you are able to do in the Production Database. Contact your security coordinator if you have questions regarding your security access.

Security coordinators at the local district and voluntary agency level assign appropriate Business Functions to each staff person in their offices, creating an individual Business Function Profile for each worker. An example of a Business Function that might be included in a FAD caseworker's BFP is MAINT FAD (Maintain FAD). Workers with the UNIT SUM ACCESS Business Function in their respective BFPs are able to review the *Assigned Workloads* of the staff members in their units. (Typically, this Business Function would be included in the BFP of a Unit Approver.)

If you are working on a stage and cannot view or modify information that relates to your job responsibilities, you should review your BFP with your supervisor to make sure the Business Functions included in your BFP are adequate for the work you are doing.

A special Business Function, VIEW SECURITY, allows you to review your BFP in CONNECTIONS to see the Business Functions assigned to you. If your BFP indicates that you do not have security access for a task you need to complete, speak with your supervisor and your office's security coordinator.

Step-by-Step:
Viewing Your Business Function Profile

1 Click on the **Options** menu on the CONNECTIONS Toolbar and select **Security**.
The Security sub-menu displays.

2 Click on the **View Staff Security** command.
The Staff Search Criteria window displays.

3 Type your first and last names into the appropriate fields.

4 Click on the **Search** button.
The Staff List displays.

5 Click on your name to select it from the *Staff List*.

6 Click on the **OK** button.
The Staff Security window displays. The Business Function list box in this window contains the Business Functions that have been assigned to you.

7 The Business Functions assigned to you are identified with red check marks. Use the vertical scroll bar inside the Business Function list box to view the entire list.

8 To close the *Staff Security* window, click on the **Cancel** button.
The Staff List displays.

9 To close the *Staff List*, click on the **Close** button.
The Staff Search Criteria window displays.

10 To close the *Staff Search Criteria* window, click on the **Close** button.

Module 1:
Maintaining Home Demographics

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

By the end of this module you will be able to:

- maintain home address phone and name information;

- update person detail information;

- remove persons from a FAD stage;

- merge and split person records;

- access and view the *Historical Person List*;

- describe how certificates and letters are handled in the CONNECTIONS system; and

- maintain Program Types and program authorization dates for FAD homes.

The Home Demographics Window

The *Home Demographics* window is used by FAD workers to record, maintain and view demographic information about a FAD home. The title bar displays the **Home Name**, **Resource ID** and **Case ID** when the window is opened in View-only or Modify mode (when the window is opened in New mode, "New" displays next to the window name in the title bar).

Fields

All of the fields in the *Home Demographics* window are modifiable except the following: **Status**, **Home Name**, **Setting**, **Auth. Agency** and **Sub Agency**. These fields are connected to the FAD license and are therefore modifiable only through the *F/A Home License* window, rather than the *Home Demographics* window. The information is carried over by the CONNECTIONS system from the *F/A Home License* window to the *Home Demographics* window.

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

The **Race** field contains a list of races and sub-groups that can be recorded in CONNECTIONS. More than one race may be selected from the list. The **Ethnicity** field contains two options, **Hispanic or Latino** and **Non-Hispanic or Latino**. The **Hispanic or Latino Origin** field contains a list of origins that can be recorded in CONNECTIONS. Multiple origins may be selected. To select an origin, double-click its corresponding check box. A red check mark will display, indicating the selection. To de-select an origin, double-click the red check mark.

Buttons

All Primary Addresses entered for FAD homes need to be validated using the **Validate** button. The **Validate** button performs CODE-1 validation for addresses to make sure that they comply with the US Postal Service address formatting standards. (The **Validate** button is disabled until address information is entered.)

The **Address…** and **Phone…** buttons allow workers to record other addresses and phone numbers that may not be the primary information but are still relevant to the home. For example, a business address or school address may be recorded. The Primary Address and Phone should be recorded directly in the appropriate fields on the *Home Demographics* window.

The **Save & Assign** button enables *only* when a new home is being recorded on the *Home Demographics* window. For updating or correcting information about an existing home, the **Save & Assign** button is disabled.

The **Save** button saves any changes that have been made to the window and returns the worker to the *Task List* for the selected stage.

The **Cancel** button cancels all changes made to the *Home Demographics* window since the last save. The **Cancel** button is disabled until changes are made to the window. Once this button is clicked, it disables until the next time changes are made to the window.

Step-by-Step:
Modifying Information on the *Home Demographics* Window

1   Click on the **WORK** button on the CONNECTIONS Toolbar.
    The Assigned Workload displays.

2   Select the FAD stage you would like to view/update.
    *The **Tasks…** button enables.*

3   Click on the **Tasks…** button
    The Task List displays.

4   Click on the **Maintain Non-Licensing Information** task.

5   Click on the **Detail…** button.
    The Home Demographics window displays.

6   Click on the **Legal Name** field and record a legal
    name.

7   Click on the drop-down arrow for the **Ethnicity**
    field and select **Hispanic or Latino** from the
    resulting list.

8   Double-click the check box(es) in the **Hispanic
    or Latino Origin** list box to select one or more
    origins.
    A red check mark displays, indicating the selection(s).

> If more than one language is
> spoken in the home, select
> "**Multiple**" in the
> **Language** field.

9   Click on the drop-down arrow for the **Religion** field and select from the resulting
    list to change the religion.

10 Click on the drop-down arrow for the **Language** field and select from the
    resulting list to change the language.

11 Click on the drop-down arrow for the **Marital** field and select from the resulting
    list to change the marital status.

12 Click on the **Save** button.
    The Task List displays.

13 Click on the **Close** button.
    The Assigned Workload displays.

Resource Address and Phone Information

When a home's primary or business address is changed and
submitted for supervisory approval, CONNECTIONS sends an
Alert To-Do to the primary worker's *Staff To-Do List*. The text
of the To-Do reads: "Update Home Study/Reauthorization RE:
Address/Name change."

> The Primary Address can only
> be changed on the *Home
> Demographics* window.

Supervisory approval is required when changing the Home Name, Primary Address or Business
Address for a FAD home that is in Accepted-Active or Emergency status. If the worker attempts

to save such changes under these circumstances by clicking on the **Save** button, the following message displays: *"Supervisor approval is required for this action. Select Save and Submit."*

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

If the pending approval is rejected, the home event status changes to "REJT." A Task To-Do is sent to the worker to make the necessary changes and he/she may navigate directly from the Task To-Do to complete the required work. When a primary and/or business address has been approved, the primary address of every person in the home is updated automatically to match the primary address of the home. If the supervisor rejects an address change, the home's original address information will be restored to the last approved address.

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

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

- Clicking on the **Yes** button opens the window in Modify mode. If the worker changes any of the information on the window and saves the changes, the pending approval event is invalidated and the worker must resubmit the approval item to the supervisor.

- Clicking on the **No** button opens the window in view-only mode.

	Step-by-Step:
	Modifying Resource Address Information

1 Click on the **WORK** button on the CONNECTIONS Toolbar.
The Assigned Workload displays.

2 Select the FAD stage you would like to view/update.
*The **Tasks…** button enables.*

3 Click on the **Tasks…** button
The Task List displays.

4 Click on the **Maintain Non-Licensing Information** task.

5 Click on the **Detail…** button.
The Home Demographics window displays.

If the Business Address is the same as the Primary Address, be sure to select the **Use as Business** checkbox. This functionality ensures that valid address information is transmitted to BICS for payment purposes and is connected to system-generated certificates and letters.

6 Click on the **Options** menu and select the **Address/List Detail…** command**.**
The Resource Address Detail window displays.

7 Click on the address in the upper grid that is to be modified.

8 Enter the new information in the **Address Information** fields.
*Type directly in the fields (except for the **Type**, **State** and **County** fields, which*

contain drop-down arrows; in these fields, click on the drop-down arrow and select from the resulting list).

9 Click on the **Validate** button.
The following message displays: "Replace with CODE-1 Validation Address?"

10 Click on the **Yes** button.

11 Click on the **Modify** button.
The window refreshes with the updated information.

12 To change another address, click on it in the upper grid to select it, then repeat **Steps 8-11**.

13 To record a new address, click on the **Clear** button.
The required fields highlight in yellow.

14 Record information in the **Type** and **Address** fields.

15 Click on the **Add** button.
The window refreshes with the new address listed.

16 When modifications are complete, click on the **OK** button.
The Home Demographics window displays.

17 Click on the **Save** button.
*The Task List displays. If the home is in Emergency or Accepted-Active status, supervisory approval is required, so the worker must select **Save & Submit**.*

18 Click on the **Close** button.
The Assigned Workload displays.

The *Resource Phone Detail* window enables workers to record, maintain and view phone number information for a FAD home. The Primary phone number is recorded directly on the *Home Demographics* window. The *Resource Phone Detail* window is used only for recording additional phone numbers for the FAD home. The Primary phone number is modifiable only on the *Home Demographics* window; it is protected on the *Resource Phone Detail* window.

	Step-by-Step:
	Modifying Resource Phone Information

1 Click on the **WORK** button on the CONNECTIONS Toolbar.
The Assigned Workload displays.

2 Select the FAD stage you would like to view/update.
*The **Tasks…** button enables.*

3 Click on the **Tasks…** button.
The Task List displays.

4 Click on **Maintain Non-Licensing Information** task.

5 Click on the **Detail…** button.
The Home Demographics window displays.

6 Click on the **Options** menu on the *Home Demographics* window and select the **Phone/List Detail…**command.
The Resource Phone Detail window displays.

7 Click on the phone number in the upper grid that is to be modified.

8 Click on the drop-down arrow for the **Phone Type** field and select from the resulting list.

9 Enter the phone number in the **Number** field.

10 Click on the **Modify** button.
The window refreshes with the updated information.

11 Click on another phone number in the upper grid to modify other phone numbers, then repeat **Steps 7-8**.

12 To record a new phone number, click on the **Clear** button and repeat **Steps 8-9**.
The Add button enables.

13 Click on the **Add** button.
The window refreshes with the new phone number listed.

14 When modifications are complete, click on the **OK** button.
The Home Demographics window displays.

15 Click on the **Save** button.
The Task List displays.

16 Click on the **Close** button.
The Assigned Workload displays.

Person Detail

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

The *Person Detail* window contains three sections. The top section contains the person's **Name**, **Type**, **Role** and **Rel/Int** (Relationship/Interest) information. It also indicates the current status of the home.

The middle section of the window contains the following fields and check boxes:

Sex	Language	Ethnicity	Race
Marital	Religion	Hispanic or Latino Origin	Age
DOB	Approx DOB	DOD	Approx DOD

The bottom section of the window contains the address and phone information for the selected person.

Fields

All of the fields on the *Person Detail* window are modifiable except the **Name** fields. The name of an individual can be changed only on the *A.K.A Name List/Detail* window. On the *Person Detail* window, CONNECTIONS records the name automatically.

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

All fields highlighted in yellow are required and must be filled in before the **Save** button will enable.

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

The **Race** field contains a list of races and sub-groups that can be recorded in CONNECTIONS. More than one race may be selected from the list. The **Ethnicity** field contains two options, **Hispanic or Latino** and **Non-Hispanic or Latino**. The **Hispanic or Latino Origin** field contains a list of origins that can be recorded in CONNECTIONS. Multiple origins may be selected. An origin is selected by double-clicking the corresponding check box. A red check mark will display, indicating the selection. To deselect an origin, double-click the red check mark. The **Race** and **Ethnicity** fields allow for more accurate demographic recording and reporting.

Buttons

All Primary Addresses recorded for FAD homes need to be validated using the **Validate** button. The **Validate** button performs CODE-1 validation for addresses to make sure that they comply with US Postal Service address formatting standards; this button is disabled until address information is entered.

The **Address…** and **Phone…** buttons allow workers to record other addresses and phone numbers that may not be the primary information but are still relevant to the person. For example, a business address or school address may be recorded. The Primary Address and Phone should be entered directly in the appropriate fields on the *Person Detail* window.

The **Save** button saves any changes that have been made to the window and returns the worker to the *Task List* for the stage selected.

The **Cancel** button cancels all changes made to the *Person Detail* window since the last save. This button is disabled until changes are made to the window. Once the button has been clicked, it disables until the next time changes are made to the window.

If you want to see person detail information about an individual for a particular date, enter the date in the **Effective Date** field and click on the **Search** button. The fields will populate with the person information that was effective on that date. Click on the **Reset** button to bring back the current information.

	Step-by-Step:
	Modifying Person Detail Information

1 Click on the **WORK** button on the CONNECTIONS Toolbar.

2 Select the FAD stage containing the person whose information you would like to view/update.

3 Click on the **Tasks…** button.
The Task List displays.

4 Click on **Maintain Person** task to select it, then click on the **List…** button.
The Person List displays.

5 From the *Person List*, select the person whose information you want to modify.

6 Click on the **Detail…** button.
The Person Detail window displays.

7 Click in the appropriate fields and change the information that needs to be modified.

8 Click on the **Close** button.
The Person List displays.

9 Click on the **Close** button.
The Task List displays.

10 Click on the **Close** button.
The Assigned Workload displays.

	Step-by-Step:
	Changing a Person's Name

1 Click on the **WORK** button.
The Assigned Workload displays.

2 Select the FAD stage containing the person whose name is to be changed.

3 Click on the **Tasks…** button.
The Task List displays.

4 Select the **Maintain Person** task and click on the **List…** button.
The Person List displays.

5 Click on the person whose name is to be changed.

6 Click on the **Options** menu and select the **A.K.A Name List/Detail…** command.
The A.K.A. Name List/Detail window displays.

7 To invalidate a name, select it from the upper grid and click on the **Invalid** check box.

8 Click on the **Modify** button.
*The window refreshes with a red check mark in the **INV** column and an end-date.*

9 To record a new name, clear the fields by clicking on the **Clear** button.

10 Enter the new name information in the **Name Information** fields.

11 If this is a new primary name, click on the **Primary Name** check box.
The system will end-date the old primary name and display a red "P" in the Primary Name column for the new primary name.

12 Click on the **Add** button.
The window refreshes with the newest information.

13 Click on the **Save** button.
The Person List displays.

14 Click on the **Close** button.
The Task List displays.

Changing a FAD Home Name

Foster Home names are in the name of the primary caretaker (usually the mother). Because of this, it is necessary to change the primary caretaker's name before you can change the home name. An example of when a FAD home name may need to change is if the foster parent marries or changes his/her last name.

The **Home Name** field is protected and defaulted on the *Home Demographics* window for all FAD homes. The field is also protected when maintaining an existing home. Information in protected fields cannot be changed on this window. Protecting

You must change or record the new name on the *A.K.A. Name List/Detail* window before you can change the Home Name. You must select from the list of names using the drop-down arrow in the **New Name** field; you cannot type directly in the field.

this field supports the preservation of system data integrity. Due to this functionality, the entire foster home name should be entered in the **Home Name** field when conducting the F/A Home Search.

Supervisory approval is required when changing the Home Name of a FAD home that is in Accepted-Active or Emergency status. If the worker attempts to save such changes under these circumstances by clicking on the **Save** button, the following message displays: *"Supervisor approval is required for this action. Select Save and Submit."*

Saving and Submitting generates a Task To-Do for the approver. An approval event also generates on the *Event List* whenever the *Home Demographics* window is Saved and Submitted.

Step-by-Step:
Changing a FAD Home Name

1 Click on the **WORK** button.
The Assigned Workload displays.

2 Select the FAD stage whose name is to be changed.

3 Click on the **Options** menu and select **Case (Stage) Name/CD**.
The Case (Stage) Name/CD window displays.

4 Click on the drop-down arrow for the **New Name** field and select the appropriate new Home Name from the list of primary names associated with the FAD stage.

5 Click on the **File** menu and select **Save & Submit**.
The following message displays:
"This change will also update the Resource Legal Name."

6 Click on the **OK** button.
The To-Do Detail window displays.

7 Click on the **Save** button.
The Assigned Workload displays.

Removing a Person from a FAD Stage

There are times when a person may need to be removed from the FAD home in CONNECTIONS. Two functions exist in CONNECTIONS to accomplish this task: **Remove Person – Left Home** and **Remove Person – Added in Error**. These functions are listed in the **Options** menu on the *Person List*. It is important for FAD workers to utilize this function, since it preserves an accurate history of the FAD home and of the individual in CONNECTIONS.

The **Remove Person – Left Home** function removes an individual from a FAD home, but keeps the person's record in the database and preserves an historical record of that individual in the home. The **Remove Person – Added in Error** function removes an individual from the home, but does *not* provide an historical record of the individual's involvement with the home. Individuals who are removed via the **Remove Person – Added in Error** function are purged from the database after 90 days if they are not associated with any other cases.

Remove Person – Left Home

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

	Step-by-Step: **Remove Person – Left Home**

1 Click on the **WORK** button on the CONNECTIONS Toolbar.
The Assigned Workload displays.

2 Click on the FAD stage associated with the person who is to be removed.
*The **Tasks…** button enables.*

3 Click on the **Tasks…** button.
The Task List displays.

4 Click on the **Maintain Person** task and click on the **List…** button.
The Person List displays.

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

6   Click on the **Options** menu and select the **Remove Person – Left Home** command.
The following message displays:
"Are you sure you want to Remove Person – Left Home?"

7   Click on the **Yes** button to remove the person from the FAD stage.
Click on the **No** button to cancel the **Remove Person – Left Home** function.
*If **Yes** was selected, the Person List refreshes with the person's name removed.*

8   Click on the **Close** button.
The Task List displays.

9   Click on the **Close** button.
The Assigned Workload displays.

Remove Person – Added in Error

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

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

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

In order to perform this function, the worker's BFP must include the "REM PER ADD ERR" Business Function. In addition, the worker must:

- have an assigned role in the FAD stage; or

- be in the primary worker's unit hierarchy.

In order to maintain accurate data for the person, the worker is responsible for making necessary demographic changes prior to performing the **Remove Person – Added in Error** function. If changes have been made to person information since the person was related, the following message displays: *"Changes made to person in this stage should be reset before continuing."*

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

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

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

	Step-by-Step:
	Remove Person – Added in Error

1 Click on the **WORK** button on the CONNECTIONS Toolbar.
The Assigned Workload displays.

2 Click on the FAD stage associated with the person who is to be removed.
*The **Tasks…** button enables.*

3 Click on the **Tasks…** button.
The Task List displays.

4 Click on the **Maintain Person** task, then click on the **List…** button.
The Person List displays.

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

6 Click on the **Options** menu and select **Remove Person – Added in Error**.
The following message displays:
"Are you sure you want to Remove Person – Added in Error?"

7 Click on the **Yes** button to remove the person from the FAD stage.
Click on the **No** button to cancel the **Remove Person – Added in Error** function.
*If **Yes** was selected, the Person List refreshes with the person's name removed.*

8 Click on the **Close** button.
The Task List displays.

9 Click on the **Close** button.
The Assigned Workload displays.

Person Merge and Person Split Functions

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

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

> The individual responsible for merging and splitting is subject to local agency policy and procedure. This task may not fall under the scope of the individual caseworker's responsibilities.
>
> A specific Business Function ("MERGE/SPLIT") is required to perform a merge or split.

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

The **M/S** column on the *Person List* indicates that a person has been involved in a merge or split.

Person Merge

Once a person merge is completed, the Person Forward (the person who is carried forward to further stages) replaces the Person Closed (the person who is merged) in all non-Intake stages (open and closed) and events.

The *Person Forward Selection* window enables workers to select specific person information to be applied to the Person Forward.

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

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

- **Primary Name**
- **Race**
- **DOD** (including reason and Approximate indicator)

- **Sex**
- **Marital Status**
- **Primary Address**

- **Ethnicity**
- **DOB** (including Approximate Indicator)
- **Primary Phone**

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

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

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

Some information is not part of the selection process on the *Person Forward Selection* window. For example, information regarding a person's Occupation and Living Arrangement is no longer recorded. When a Person Merge is complete, the Person Forward's information is retained for Occupation and Living Arrangement. This information also displays in the Person Data Report.

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

Step-by-Step:
Merging Person Records

1 From the *Assigned Workload*, select the stage containing the person information that requires merging.
*The **Tasks…** button enables.*

2 Click on the **Tasks…** button.
The Task List displays for the selected stage.

3 Click on the **Maintain Person** task.
*The **List…** button enables.*

4 Click on the **List…** button.
The Person List displays.

5 Click on the name of the person to be merged.

6 Click on the **Options** menu and select **Person Merge/Split**.
The Person Merge/Split window displays. The highlighted name from the Person List pre-fills in the Merged Persons Closed section.

7 Enter the **Person ID** of the Merged Forward Person.

8 Click on the **Validate** button.
*The system checks for an open case and a valid Person ID. When the check is complete, the **Merge** button enables.*

9 Click on the **Merge** button.
If the person to be closed is in an open stage, the following message displays:
"The closed person is in open stages. Merge with extreme caution. Continue?"

10 Click on the **Yes** button.
The following message displays: "Merge ID# into ID#?"
*The first ID number listed is for the Merged Closed Person. The second ID number is for the Merged Forward Person. **NOTE**: If you realize that you have made a mistake in selecting your persons, click on the **No** button. The Person Merge/Split window remains open until you close it.*

11 Click on the **Yes** button.
The Person Forward Selection window displays.

12 Select information from *the Person Forward Selection* window by clicking on the radio button next to each applicable field.
The type of information you select—and which person you select it from—affects the information that is retained for the Person Forward.

Person Merge Warnings and Error Messages:
When completing a person merge, you may see warnings and/or error messages. Warnings do not prevent you from completing a merge, but error messages do.

Reasons for Warnings:
Both persons must be the same sex (if recorded).

Both people must have a DOB that is within 5 years (if recorded).

One of the persons is involved in a fatality report.

Reasons for Error Messages:
Social Security numbers do not match.

13 When you have made all of your selections from the *Person Forward Selection* window, click on the **OK** button.

14 Click on the **Yes** button to confirm the merge process.
The name of the person logged on and the date of the merge displays in the **Staff NM Merge** *and* **Date Merge** *fields.*

15 Click on the **Save** button.
The change is saved in the system and the Person Merge/Split window displays.

16 Click on the **Close** button.
The Person List displays.

17 Click on the **Close** button to close the *Person List*.
The Task List displays.

18 Click on the **Close** button to close the *Task List*.
The Assigned Workload displays.
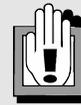
Because of the complexity involved with restoring this information, merges should be completed with care.

If you determine that the person selected to be merged closed should, in fact, be merged forward, use the **Switch** function:

1 Click on the **Options** menu.

2 Click on the **Switch** command.

Person Split

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

After a Person Split is performed, the information for the Person Closed can be accessed through the *Person Detail* window when conducting a Person Search. Person Detail information that existed for the Person Closed prior to the merge is restored. The worker must update all demographic information and "return" the Person Closed to all appropriate stages and events. The worker can use the **Maintain Person** task to restore the Person Closed to open stages. The worker also must remove the Person Forward by performing the **Remove Person – Added in Error** function. (See page 25.)

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

**Step-by-Step:
Splitting a Person Record**

1 On the *Assigned Workload*, select the stage which contains the person information that was merged in error.
The **Tasks…** *button enables.*

2 Click on the **Tasks…** button.
The Task List displays for the selected stage.

3   Click on the **Maintain Person** task.

4   Click on the **List…** button.
The Person List displays for the selected stage.

5   Click on the name of the person who was merged in error.

6   Click on the **Options** menu and select **Person Merge/Split**.
The Person Merge/Split window displays. The system pre-fills the person's name into the Merged Persons Closed section.

7   In the list section at the top of the window, select the merge you want to split.
The system fills the merge information into the detail section of the window.

8   Click on the **Split** button.
The following message displays:
"Split ID# from ID#?"
The first ID number listed is for the Closed Person. The second ID number is for the Forward Person.

9   Click on the **Yes** button.

10 Click on the **Save** button.
The change is saved in CONNECTIONS. The Person List displays.

11 Click on the **Close** button to close the *Person List*.
The Task List displays.

12 Click on the **Close** button to close the *Task List*.
The Assigned Workload displays.

> **Things to Consider Before Splitting:**
>
> The Merged Forward Person ***cannot be deleted*** from the stages that were open at the time the Person Merge took place. The Merged Closed Person's pre-merge information is ***not*** "reattached" by completing a Split. Follow-up demographics and case/stage maintenance are necessary to complete the process.

Historical Person List

The *Historical Person List* displays all individuals removed from a specific FAD home because they left the home. In order for these individuals to display on the *Historical Person List*, the worker must use the **Remove Person – Left Home** function (page 24). Individuals who were removed from a FAD home because they were Added in Error (via the **Remove Person – Added in Error** function) do not display on the *Historical Person List*.

The **Options** menu on the *Person List* includes the **Historical Person List** command, which opens the *Historical Person List*. This window displays all of the individuals removed from a specific FAD stage, including the date on which each person was removed. A specific Business Function is required to enable this command.

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

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

	Step-by-Step: **Viewing the Historical Person List**

1 Click on the **WORK** button.
The Assigned Workload displays.

2 Select the FAD stage containing the *Historical Person List* you would like to view.
*The **Tasks…** button enables.*

3 Click on the **Tasks…** button.
The Task List displays.

4 Click on the **Maintain Person** task.

5 Click on the **List…** button.
The Person List displays.

6 Click on the **Options** menu and select **Historical Person List**.
The Historical Person List displays.

7 Click on the **Close** button to close the *Historical Person List*.
The Person List displays.

8 Click on the **Close** button to close the *Person List*.
The Tasks List displays.

7 Click on the **Close** button to close the *Task List*.
The Assigned Workload displays.

Effect of Historical Persons on
Foster Home Certificates and Approval Letters

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

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

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

The F/A Home License Window

Recording and Modifying Program Types

The Benefits Issuance Control System (BICS) pays foster homes for the services they provide to children placed in their care. BICS is being enhanced to pay Voluntary Agencies based on an established rate. The amount of these payments for Voluntary Agency-certified or approved foster homes is based on a number of factors, including the **Program Type** recorded on the *F/A Home License* window in CONNECTIONS. The Program Type reflects the degree of care and supervision in the foster home. For this reason, it is imperative that a foster home's Program Type accurately reflects the home's actual classification.

The Program Type(s) selected on this window must be compatible with the selected **Facility Type**. If an incompatible Program Type is selected, the following message displays:

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

The following selections are available in the **Program Type** field on the *F/A Home License* window:

- Therapeutic
- Special Needs – Mother/Child
- Special Needs – Medical
- Special Needs – Maternity
- Special Needs – Hard to Place
- Special Needs – HIV +/ AIDS
- Special Needs – Behavioral

- Regular
- Emergency
- Cong. Care/FA – Refugee Assistance Program
- Cong. Care Only – Supervised Independent Living Program
- Cong. Care Only – Sexual Offenders
- Cong. Care Only – Diagnostic Reception Center

The "MAINTAIN FAD" Business Function must be included in a worker's Business Function Profile (BFP) in order for the worker to record information on the *F/A Home License* window. In addition, the worker must be the Primary or Secondary worker assigned to the FAD stage, or be a member of the Primary or Secondary worker's unit hierarchy.

At least one Program Type must be selected for a foster home; multiple Program Types may also be selected. If a worker attempts to save the *F/A Home License* window without recording a Program Type, the following message displays:

"You must have at least one program type checked in order to save."
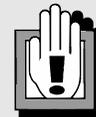
> Keep in mind that the "Emergency" **Program Type** denotes a particular type of foster home that is certified to accept emergency placements on an ongoing basis.
>
> This is *not* to be confused with a foster home that is in "Emergency" **Status**.

Program Authorization Dates

Four pairs of **From** and **To** date fields display at the bottom of the *F/A Home License* window. Each pair of date fields corresponds to one of the BICS non-Congregate Care program type groups (Therapeutic, Special Needs, Regular and Emergency). These date fields are required for any FAD home with a **Setting** of "Foster Home" and a **Program Type** selected from one of these four groups.

These **From** and **To** dates are *not* the same as the certification/approval (or recertification/ reapproval) **From Date** and **To Date** fields in the upper right corner of the *F/A Home License* window. While the certification/approval **From Date** and **To Date** fields reflect the current certification/approval period for the foster home (and are system-generated when the certification/approval or recertification/reapproval is approved by the supervisor), the Program Type group **From** date fields at the bottom of the window reflect the dates when the foster home was authorized to begin operations in accordance with the corresponding Program Type. The **From** type for the applicable Program Type group must be recorded by the worker.

For example, a foster home began operations as a Therapeutic foster home (and progressed to Accepted-Active status for the first time) on April 30, 2001; at that time, the home's *certification* **From Date** and **To Date** would be 4/30/2001 – 4/30/2002. The home was recertified in April 2002, changing the *certification* **From Date** and **To Date** to 4/30/2002 – 4/30/2003. The Therapeutic (*Program Type*) **From** field still reads 4/30/2001, because that was the date on which the home first began operations as a Therapeutic foster home. Since the Therapeutic Program Type has never been deselected, the Therapeutic (*Program Type*) **To** field remains blank. Recertification/reapproval of a foster home does not change the *Program Type* **From** or **To** date fields.

For many foster homes in CONNECTIONS, the **From** date for a selected Program Type group will be the same as the date the home was certified or approved to provide care. There are, however, situations in which a foster home's program type(s) may change. For example, a home may originally have been certified as a Regular foster home on 5/15/2002, but the foster parents subsequently meet the regulatory requirements (including specialized training) and receive certification to provide Therapeutic foster care services on 10/23/2002. This particular change would result in a change in the amount of payment the foster parents would receive from BICS for affected children who are placed in the home. This change would be reflected not only in the **Program Type** field, but also in the corresponding Program Type **From** and **To** date fields, as applicable.

A BICS program type group is considered *selected* when *at least one* of its associated CONNECTIONS program types is selected; it is considered *deselected* if *none* of its associated program types is currently selected.

When one of these choices is selected in the **Program Type** field, the corresponding **From** date field highlights in yellow, indicating that it is a required field.

If a worker attempts to save the *F/A Home License* window after selecting an item in the **Program Type** field without recording a corresponding **From** date, the following message displays:

"Program Type From Date required for selected program type(s)."

Valid program type dates are defined as follows:

- Both the **From** date and, if applicable, the **To** date must be within the past two years.

- Both the **From** date and, if applicable, the **To** date must not be more than six months in the future.

- The **To** date can never be earlier than the **From** date.

If the worker records an invalid date in one of the date fields, one of the following messages displays, as applicable:

"Program Type Dates must be within the past 2 years."

"Program Type Dates must not exceed 6 months in the future."

"Program Type To Date cannot be less than From Date."

The **From** date field does not populate automatically; the worker must record the appropriate date in this field on the *F/A Home Licensing* window. The **From** field must contain the date the foster home is authorized to begin operations. This date cannot be more recent than the **To** date. The **To** date will always be blank until a particular home's program ends. (The worker must *deselect* the applicable Program Type and then record the appropriate date in the **To** field for that Program Type group. The **To** date is *never* system-generated.)

When a worker opens the *F/A Home License* window, if the **Program Type** field is blank, the corresponding **From** and **To** date fields will enable when an applicable program type is selected. If a valid date is already present when the worker opens the *F/A Home License* window, the date is modifiable regardless of which program type is selected (or if no program type is selected).

Once a home has been progressed to Accepted-Active status, if a worker deselects a previously selected item in the **Program Type** field and selects another non-Congregate Care program type group, the **To** date must be completed for the *deselected* program type group.

If a worker records a program type **From** date and saves the *F/A Home License* window, but then needs to remove the entry, the worker must deselect the recorded program type, record the same value from the **From** field into the **To** date field and save the change. Each deselected program type group's **From** and **To** fields should contain valid data.

If a worker attempts to save the *F/A Home License* window after deselecting an item in the **Program Type** field without recording a corresponding **To** date, the following message displays:

> *"Program Type To Date required for*
> *de-selected program type(s)."*

The program type **From** and **To** date fields can be modified only after the home has progressed to Accepted-Active status at least once.

CONNECTIONS will retain and display all saved Program Type **From** and **To** dates, regardless of the Program Type that is currently selected for the foster home.

	Step-by-Step: **Recording Program Types and** **Corresponding Program Dates** **on the *F/A Home License* Window**

1 From the *Task List* for a selected foster home, select the **Maintain Licensing Information** task and click on the **Detail…** button.
The F/A Home License window displays.

2 In the **Program Type** field, double-click to select a program type.
*A system edit requires you to select at least one program type; multiple program types may be selected. The program type(s) you select must be appropriate for the **Setting** and **Facility Type** recorded on the window.*

3 If a Therapeutic, Special Needs, Regular or Emergency program type is selected, the corresponding **From** date field highlights in yellow, indicating that it is a required field.

4 Enter a valid date in the applicable **From** date field.

5 If the foster home is in any status *other than* Accepted-Active or Emergency, click on the **Save** button to save the changes to the window.

—OR—

If the home is in Accepted-Active or Emergency status, click on the **Save and Submit** button to save the changes and submit them for supervisory approval.

Note for Supervisors:

The Program Type **From** and **To** date fields cannot be viewed from the FRS or via a Resource search. To view these fields, open the *F/A Home License* window from the *Event List* or the *Task List*. (Both lists can be accessed from caseworker's *Assigned Workload*.) The instructions below open the *F/A Home License* window from the *Assigned Workload*:

1 Open the caseworker's *Assigned Workload* (via the *Unit Summary* window), select the applicable FAD stage and open the *Task List*.

2 Select the **Maintain Licensing Information** task and click on the **Detail…** button.
If the F/A Home Licensing window is pending approval, the following message displays: "Saving will invalidate the pending approval. Continue in modify mode?"

3 Click on the **No** button, since you only want to *view* (not modify) the information.
The F/A Home License window displays in view-only mode.

Module 2:
FAD Local Data Maintenance

The Local Data Maintenance (LDM) function in CONNECTIONS is used to maintain *closed* FAD stages. *This is a corrective process only*. It is to be used exclusively to correct errors or oversights in the original home record.

By the end of this module, you will be able to:

- access the *LDM* window;

- recognize the components and layout of the *LDM* window;

- change person demographics; and

- access and use the LDM Online Help functions.

Local Data Maintenance (LDM) Security

There are situations in which case information for a closed FAD home needs to be corrected. For example, a person's name, address or other demographic information might have been recorded incorrectly. FAD workers can view and update person demographic information in closed FAD stages by selecting the **Maintain Closed Person Demographics** command from the **Options** menu on the *Case Summary* window. The **Maintain Closed Investigation** command is not available to FAD workers. **Maintain Closed Person Demographics** can be used to correct demographic information due to an error in data entry in the original investigation or due to the availability of additional information.

The *LDM* window is a single, multi-tabbed window that allows designated workers to view and correct information in closed FAD homes. FAD workers can only use this window to correct person demographic information.

Access to the *Local Data Maintenance* window requires the "MAINT CLSD PERS" Business Function. The actions permitted by this Business Function and the method of accessing LDM are discussed below. (To view your own Business Function Profile, see "Viewing Your Business Function Profile" on page 13 of this guide.)

Menu Command on *Case Summary* **Window**	Maintain Closed Person Demographics
Security Attribute Needed	Maintain Closed Person Demographics
Additional Access Requirements	• FAD stage is closed *and* • Worker must be from same district/agency as primary worker when stage was closed
LDM Tabs Enabled	Person Demographics

Accessing the LDM Window

The *LDM* window contains four tabs: **Person Demographics**, **Add/Relate Person**, **Allegations** and **Investigation Conclusions**; but only one—the **Person Demographics** tab—is available to FAD workers.

The *LDM* window can be accessed through the *Case Summary* window. Selecting the **Maintain Closed Person Demographics** command opens the *LDM* window in modify mode.

Since the case in question is closed, it does not display on the *Assigned Workload*. Therefore, it is necessary to perform a Case Search.

Step-by-Step:
Accessing LDM from the *Case Summary* Window

1 Click on the **Case** button on the CONNECTIONS Toolbar.
The Case Search Criteria window displays.

2 Type the **Case ID** or **Case Name** into the appropriate fields.

3 Click on the **Search…** button.
The Case List displays with the search results.

4 Click on the home that is to be viewed or updated.

5 Click on the **Summary** button.
The Case Summary window displays.

6 Click on the stage to select it.

7 Click on the **Options** menu and select the **Maintain Closed Person Demographics…** command.
The LDM window displays with the Person Demographics tab active.

8 Click on the **Close** button to close the *LDM* window.
The Case Summary window displays.

9 Click on the **Close** button to close the *Case Summary* window.
The Case List displays.

10 Click on the **Close** button to close the *Case List*.
The Case Search Criteria window displays.

11 Click on the **Close** button to close the *Case Search Criteria* window.
The CONNECTIONS Toolbar displays.

The Layout of the LDM Window

The LDM window is organized into three sections:

- Heading

- Tabs

- Footer

The Heading, which is always present when the *LDM* window is open, includes the following information: Case Name, Stage ID, Case Status, Case ID, Report Date and Event Status.

When the *LDM* window is opened via the **Maintain Closed Person Demographics** command on the *Case Summary* window, no events are generated and the **Event Status** field is blank.

The Footer is always present when the *LDM* window is open. Only the **Close** button appears in the Footer. Clicking on this button closes the *LDM* window. In this example, closing the *LDM* window returns you to the *Case Summary* window. This process also gives you the opportunity to save changes to the *LDM* window.

Information recorded on the *LDM* window is stored in the CONNECTIONS database. When you re-open the *LDM* window, it is "refreshed" with the most current information. This information can be reviewed and, if necessary, updated further.

Person Demographics Tab

The **Person Demographics** tab is the default tab when LDM is accessed. It allows workers to view and correct information about persons associated with a closed FAD home. This tab is the only active LDM tab for FAD workers.

The tab is divided into two sections:

- The upper grid lists all of the persons in the stage.

- The lower grid contains detailed information about the person selected in the upper grid.

Clicking in a row of the upper grid selects that person for modification. An arrow to the left of a row indicates that the information in the lower grid applies to that person.

All columns in the upper grid are modifiable by clicking directly in the grid cell and typing, with the following exceptions:

You can navigate to the LDM from the *Person Search* window as follows:

1. Select the person from the Person Search List by clicking on that row of the list.

2. Click on the **Case List** button on the *Person Search* window.

3. Select the appropriate case on the *Case List*.

4. Click on the **Summary** button on the *Case List*.

   The *LDM* window can be accessed from the *Case Summary* window as described on page 37.

Column	Modified by…
Person ID	Cannot be modified *This number is system generated*
Race	Race selection box elsewhere on **Person Demographics** tab
Ethnicity	Ethnicity drop-down and selection box elsewhere on **Person Demographics** tab
Phone, Extn, Type	*Maintain Primary Address/Phone* window. Accessed via **Address/Phone** button elsewhere on **Person Demographics** tab
Role	Automatic (re)calculation when changes to **Allegations** tab are saved

Updating a person's date of birth in LDM changes the person's date of birth in all other stages associated with that person. Since a person in open stages cannot be modified, the affected stages are all closed stages.

The **Age** field cannot be modified if there is an exact date of birth listed in the **DOB** field. If corrected exact date of birth information becomes available, correct the **DOB** field; the **Age** field updates automatically. If the **DOB** is marked Approximate (**A**) or Estimated (**E**), the **Age** field can be modified. When **Age** is modified, the **DOB** is recalculated and updated. If new *exact* date of birth information is recorded, be sure to change the date of birth type in the **T** column.

Before changing a person's name on the **Person Demographics** tab, a Person Search needs to be performed to determine if the new name is known to CONNECTIONS. If the name is known to the system, use the **Add/Relate Person** function, rather than changing the name on the **Person Demographics** tab.

The **Race** and **Ethnicity** of the person selected in the upper grid can be modified using the drop-down arrow and list boxes in the lower right corner of the tab.

Field	Enabling	Modification
Ethnicity (drop-down field)	Enables when a person is selected in the upper grid.	Updates the **Ethnicity** column in the upper grid. This field displays "NR" when the **Ethnicity** column in the upper grid reads "Not Reported."
Ethnicity (list box)	Enables when a person is selected in the upper grid *AND* "Hispanic or Latino Origin" displays in the **Ethnicity** field.	Click on an origin to select it from the list. Multiple origins may be selected.
Race (list box)	Enables when a person is selected in the upper grid.	Updates the **Race** column in the upper grid. Click on a race to select it from the list. Multiple races may be selected. If more than one Race is selected in this field, the upper grid displays "Multiple."

The lower grid displays the following information for each identifier:

- ID
- Invalid Flag
- ID Type

- ID Number
- Start Date

- End Date
- Comment

When a person is selected in the upper grid, the lower grid displays all person identifiers (SSN, CIN, etc.) for that person. Each identifier appears in its own row of the lower grid. An arrow to the left of the row indicates that identifier is currently selected for editing. New identifiers can be added by typing into the bottom-most row of the lower grid, which is marked with an asterisk (*). Adding a new row with the same **Type** as an existing row (that does not have an End Date) sets the End Date of that existing row to the current date.

The information in the lower grid is modifiable as follows:

Column	Modified by…
ID Invalid Flag	Can only be marked (using the drop-down arrow that appears when you click in the cell); cannot be removed. Marking the flag as Invalid will set the end date of that row to the current date.
ID Type	Can be selected for new rows using the drop-down arrow that appears when you click in the cell. This field cannot be modified for existing rows.
ID Number	Can be modified by clicking and typing directly in the grid. Cannot be modified in a row for which an End Date is set.
Start Date	Automatically set to the current date when a new ID type is added.
End Date	Automatically set to the current date when the ID Invalid Flag is selected (marked) or when a new row with the same ID Type is added.
Comments	Can be modified by clicking and typing directly in the grid.

Buttons on the Person Demographics Tab

The **Address/Phone** button never enables for closed FAD stages, since address information is tied to the FAD home license that was issued for the closed home; it therefore cannot be changed.

Clicking on the **Save** button saves changes made on the **Person Demographics** tab. This button is disabled until changes are made on the tab. The **Save** button disables after a save until the next time changes are made to the tab.

Clicking on the **Close** button closes the *LDM* window and returns the worker to the window from which the *LDM* window was accessed (the *Case Summary* window). This process also gives the worker an opportunity to save any unsaved changes to the *LDM* window.

Clicking on the **Cancel** button cancels all changes made to the tab since the last save. It is disabled until changes are made on the **Person Demographics** tab. Clicking on the **Cancel** button displays the following message:

"Your changes will be lost. Continue?"

- Clicking on the **Yes** button discards any unsaved changes.

- Clicking on the **No** button leaves the changes as they were entered.

Step-by-Step:
Changing Person Demographics in the Upper Grid

1 Open the *LDM* window for the selected stage.
*See **Steps 1-7** on page 38.*

2 Select the person from the *Person List* by clicking in the column to the left of the **Last Name**.
A black arrow indicates the person who has been selected.

3 Click in the **DOB** field and update the information located there.
*If the child's age has been modified to be more than 18 years old for CPS Familial/FC-DC cases, or more than 21 years old for IAB cases, the following message displays when the **Save** button is clicked:*
"Age over <18 or 21> years as of Intake. Continue with Save?"

4 Click on the **Save** button.
The following message displays:
"Changes have been saved."

5 Click on the **OK** button.

6 To change ethnicity, click on the drop-down arrow for the **Ethnicity** field and select from the resulting list.
*Select either **Hispanic or Latino Origin** or **Non-Hispanic or Latino Origin**, as appropriate.*

The **Date of Death** and **Approximate Date of Death** columns can only be modified if a **Date of Death** already appears in the grid for that person.

7 To specify categories within Hispanic or Latino origin, click on an **Origin** check box from the list below the **Ethnicity** field.
*In order to select an origin in this field, "Hispanic or Latino Origin" must display in the **Ethnicity** field. An "X" displays in a specific origin's check box when it has been selected. To clear a selection, click on the check box again to remove the "X." Multiple origins may be selected from the list box.*

8 Click on the **Save** button to save the changes to the **Ethnicity** field.
The following message displays:
"Changes have been saved."

9 Click on the **OK** button.

10 In the **Race** field, click on a race's check box to select it from the list.
An "X" displays in the check box when it has been selected. To clear a selection,

click on the check box again to remove the "X." Multiple races may be selected from the list.

11 Click on the **Save** button to save the changes to the **Race** field.
The following message displays: "Changes have been saved."

12 Click on the **OK** button.

13 Click on one of the **Language** check boxes to select a language from the list.

14 Click on the **Save** button.
The following message displays: "Changes have been saved."

15 When you are finished correcting information on the **Person Demographics** tab, click on the **Close** button.
The Case Summary window displays.

16 Click on the **Close** button to close the *Case Summary* window.
The Case List displays.

17 Click on the **Close** button to close the *Case List*.
The Case Search Criteria window displays.

18 Click on the **Close** button to close the *Case Search Criteria* window.
The CONNECTIONS Toolbar displays.

A person's information on this tab cannot be modified if that person is associated with any open, non-ARI stage. Attempting to modify information for a person in an open non-ARI stage results in the following message:

"Can't modify demographic information of people in open stages. Person member of Stage ID:###"

Correcting demographic information for a person who is associated with an open stage can only be done on the *Person Detail* window, not through the *LDM* window. Conduct a person search to determine if the person in question is associated with any open stages and contact the primary worker associated with the open stage to discuss any changes.

**Step-by-Step:
Changing Person Demographics in the Lower Grid**

1 Open the *LDM* window for the selected stage.
See "Accessing the LDM Window" on page 37.

2 Select the person from the *Person List* by clicking in the column to the left of the **Last Name**.
A black arrow indicates the person who has been selected.

3 Click on the drop-down arrow in the **INV** column and select **No**.
*This indicates that the person identifier is **not** invalid. (Selecting **Yes** indicates that it is invalid.)*

4 Click on the drop-down arrow in the **Type** column and select the appropriate identifier from the resulting list.

5 Click in the **Number** column and record the identifier number.

6 Click on the **Save** button.
The following message displays
"Changes have been saved."

7 Click on the **OK** button.

8 Click on the **Close** button to close the *LDM* window.
The Case Summary window displays.

9 Click on the **Close** button to close the *Case Summary* window.
The Case List displays.

10 Click on the **Close** button to close the *Case List*.
The Case Search Criteria displays.

11 Click on the **Close** button.

You must save (by clicking on the **Save** button) after *each* change you make to the **Person Demographics** tab in order for that change to be stored in the CONNECTIONS database. Therefore, if more than one change has been made, only the last one, if unsaved, is discarded when the **No** button is clicked.

LDM Online Help

CONNECTIONS provides an extensive Help program, which contains information on all functions of LDM, as well as policy and procedure guidelines, law and definitions. Context-sensitive help information is available for all elements of the *LDM* window, including tabs, grids, buttons and individual fields. Click on an element to make it "active" and press the **F1** key on your keyboard to display information about that LDM element.

The **F1** key does not activate LDM Help when you are viewing the Investigation Conclusion narrative.

LDM Online Help includes the following features:

- A Table of Contents allowing access to all Help information

- Index and Search functions providing alternate means of finding information

- Interactive graphic examples of *LDM* window elements (clicking on certain portions of a graphic within LDM Online Help displays explanations of that element)

- Hyperlinks that display related information, such as definitions and procedural guidelines

Pressing the **F1** key opens the LDM Help system. Information specific to the *LDM* window element that was active when the **F1** key was pressed will display. Once in the Help system, the Table of Contents allows access to Help information on other elements of the *LDM* window.

Besides context-sensitive Help information on *LDM* window elements such as fields, tabs and buttons, the LDM Help system includes the following:

LDM Overview
A high level summary of LDM, including a listing of its features and functions. This overview can be accessed directly by clicking on the **Help** menu in the upper left corner of the *LDM* window and selecting the **LDM Help** command.

"How Do I?"
Information about how to navigate within the *LDM* window and how to use its functions effectively.

Glossary
Definitions of terms commonly used in casework as well as definitions of *LDM* window elements and concepts.

Guidelines
Background on the legal, policy and procedural guidelines followed by workers as they develop and record information in the *LDM* window.

Help on Help
Instructions for using the LDM Online Help system.

Key elements of the information in this Step-by-Step Guide relating to features and functionality of the *LDM* window can also be found in the LDM Online Help.

	Step-by-Step: **Accessing LDM Online Help**

1   Click on the **CASE** button on the CONNECTIONS Toolbar.
The Case Search Criteria window displays.

2   Type the **Case ID** or **Case Name** in the appropriate fields.

3   Click on the **Search** button.
The Case List displays.

4   Click on the case to be viewed/updated.

5   Click on the **Summary** button.
The Case Summary window displays.

6   Click to select the closed FAD home to be viewed or updated.

7   Click on the **Options** menu and select **Maintain Closed Person Demographics.**
The LDM window opens with the Person Demographics tab displayed.

8   Click in any field on the **Person Demographics** tab to make it active.

9   Press the **F1** key on the keyboard.
LDM Online Help information displays for the selected field.

10 Click on the **Contents** tab and click on any of the items listed.

11 Click on the **Close** button to close the topic.

12 Click on the **Index** tab and click on any item listed.

13 Click on the **Close** button to close the topic.

14 Click on the **Search** tab and enter search criteria.
Review the results displayed.

15 Click on the **Close** button.
The LDM window displays.