



CONNECTIONS Tip Sheet

Getting Ready to Search in the Placement Dashboard Window

The *Placement Dashboard* window is a central location used to complete the placement search and referral process. Workers with the PLACE DASH Business Function can view placement requests for children in their district/agency. In addition, agency workers can see all open placement requests referred to the agency and those requests that are in “Place” or “Waitlist” status. Additional Business Functions are required in order to maintain, search, and verify a placement status. If you have questions about your district/agency’s local protocol for placement-related tasks in CONNECTIONS, you are encouraged to speak with your supervisor.

Accessing the Placement Dashboard Window

- 1 Click the **Search/Maintain** drop-down menu on the main CONNECTIONS window.
- 2 Select “Placement.”
*The **Placement Dashboard** window displays.*
- 3 Select a request in the **Requests for Placement Services** grid.
*The **Placement Request Details** section displays.*

Overview of the Window

The *Placement Dashboard* window displays the title bar, **NAVIGATION PANE**, work area, and legend that are standard to most CONNECTIONS windows.

The **Search All Placement Requests** section at the top of the window allows you to search for a placement. District workers can search by Agency or Case; voluntary agency workers can search by District or Case; and state and Regional Office workers can search by any of the three criteria.

The screenshot shows the Placement Dashboard window. The **Title Bar** contains the window title and standard OS controls. The **NAVIGATION PANE** on the left lists various options like 'View Recent', 'Verify Placements', and 'Placement Search'. The **Work area** contains a search section and a table of requests. A callout points to the table, stating: 'Selecting a request for placement displays the Placement Request Details section below the grid.' Another callout points to the 'New Using' button, stating: 'Clicking the New Using button prefills fields with data from previous records. The New Using button is disabled if there are no prior requests for placement services.' The **Legend** at the bottom explains symbols like 'Sensitive', 'Required', 'AFCARS', etc.

Request ID	Stage Name	Originating Stage ID	Stage	Stage Type	Creation Date	Requested Placement Date	Initial
15	Hill, Jean	25300853	INV	INI	08/09/2019	08/09/2019	Wilson
14	Hill, Jean	25300849	INV	INI	08/09/2019	08/09/2019	Wilson
13	Hill, Jean	25300845	INV	INI	08/09/2019	08/09/2019	Wilson

The NAVIGATION PANE Options

The **NAVIGATION PANE** on the *Placement Dashboard* window has three sections: **Options**, **Child Options**, and **Placement Options**. The links in these sections provide you with resources to assist you in placing a child with the best-fit resource.



Options

Links in the **Options** section allow you to verify placements and choose from various ways of viewing search results and placement data. For example, the **View Recent** link displays placement requests from within the last 30 days (including closed requests). The same link changes to “**View Active**,” which displays all active placements.

Child Options

Links in the **Child Options** section allow you to record child-specific information for the placement request. The MAINT PLACE Business Function is required to access these links.

Placement Options

Links in the **Placement Options** section provide access to search and match functions. The **Priority Criteria** link allows you to view characteristics recorded for the child(ren). The **Placement Search** link, which is enabled when the Request Status is “Ready for Search,” conducts a search for resources and displays them in the *Placement Resource Search Results* window. The **Referral Detail** link allows you to view or maintain referrals for each placement request. Refer to pages 3 and 4 for additional information on these links.

Reviewing Resource Search Parameters

The **Resource Search Parameters** section is used to narrow the pool of resources when considering placement options. All fields in this section are modifiable when the Request Status is “In-Process” or when the worker has a specific Business Function.

The **Search Type** field is where you choose the type of search to perform:

- A “Multi-Facility” search compares the criteria in the request to the services provided at the available resources and returns the most likely resources.
- An “Exact” search allows you to search for a specific (known) resource when it has been determined as the most appropriate resource.

The screenshot shows the 'Resource Search Parameters' window. At the top, there are dropdown menus for 'Search Type' (set to 'Multi-Facility'), 'Setting' (set to 'Foster Home'), and 'Language' (set to 'English'). Below these are two grids for selecting program types. The 'Program Types' grid has checkboxes for 'Therapeutic', 'Special Needs - Mother/Child', 'Special Needs - Medical', and 'Special Needs - Maternity'. The 'Local Program Types' grid has checkboxes for 'Regular', 'TFFC - Treatment Family Foster Care', 'TFCO - Treatment Foster Care Oregon', and 'DD - Developmental Delays and/or Developmental Disabilities'. A text box at the bottom explains that at least one selection must be made in either grid and that conflicting selections will result in limited or no search results.

Program Type and Local Program Type are required resource search elements; at least one selection must be made in either grid. Making multiple grid selections that conflict with one another will result in limited or no search results.

Program Types	Local Program Types
<input type="checkbox"/> Therapeutic	<input checked="" type="checkbox"/> Regular
<input type="checkbox"/> Special Needs - Mother/Child	<input type="checkbox"/> TFFC - Treatment Family Foster Care
<input type="checkbox"/> Special Needs - Medical	<input type="checkbox"/> TFCO - Treatment Foster Care Oregon
<input type="checkbox"/> Special Needs - Maternity	<input type="checkbox"/> DD - Developmental Delays and/or Developmental Disabilities

Program Types
The **Program Types** grid is used to identify which Office of Children and Family Services (OCFS) program is required for the placement request. Program Types are defined by OCFS and authorizing agencies; they are not based solely on the characteristics of children currently living in the home. The Program Type selected must correspond with the selected setting (e.g., “Foster Home”).

Local Program Types
The **Local Program Types** grid is used to identify which county-specific Program Types are required for the placement request. These are recorded on the **Resource Characteristics** tab by the resource coordinator.

Using the Placement Options Links

As introduced on page 2, clicking the links in the **Placement Options** section of the **NAVIGATION PANE** allows you to view information that is used in the search and match process.



Completing Priority Criteria

The *Priority Criteria* window displays all characteristics recorded for the child(ren) and is used to designate those characteristics as either optional or required in the placement search. This window is required; it must be complete in order to conduct a placement search.

Each placement request has its own priority criteria record that is saved with the request, allowing workers to view the information as it was when the request was opened. Children that are in the case but not included in a particular request will not be included on the *Priority Criteria* window for that request.

Within the characteristics grid, a column displays for each child in the request. When a characteristic applies to a child, a “Y” displays for it in the child’s column. For each characteristic that applies to the child, make sure the correct radio button—**Required** or **Optional**—is selected.

Required	Optional	Child Characteristics	Hill, William
<input type="radio"/>	<input type="radio"/>	Aggression towards others	
<input type="radio"/>	<input type="radio"/>	Aggression towards property	
<input type="radio"/>	<input type="radio"/>	Bedwetting or encopresis	
<input type="radio"/>	<input type="radio"/>	Chronic medical condition	
<input type="radio"/>	<input type="radio"/>	Complex medication regimen	
<input type="radio"/>	<input type="radio"/>	Developmental disability	
<input type="radio"/>	<input checked="" type="radio"/>	Dietary restrictions	Y
<input type="radio"/>	<input type="radio"/>	Frequent appointments	

Once the window is complete, the **Priority Criteria Complete** checkbox at the bottom of the window must be selected and saved.

Updating the Request Status

Once all information for the placement request is complete, the Request Status must be changed to “Ready for Search,” which will enable the **Placement Search** link.

- 1 In the **Placement Request Details** section, click the drop-down arrow for the **Request Status** field. “In-Process,” “Ready for Search,” and “Withdrawn” display. “Searched” will display after a placement search has been completed.
- 2 Select “Ready for Search.” The **Placement Search** link enables.
- 3 Click the **Save** button.

	Name	DOB	Age	Sex	PID	Street Address	PO Box Apt	City	State	Zip Code
<input type="checkbox"/>	Hill, Ken	10/31/2015	4	M	15301479	550 TEALL AVE		SYRACUSE	NY	13206-3547
<input checked="" type="checkbox"/>	Hill, William	12/23/2005	14	M	15301478	550 TEALL AVE		SYRACUSE	NY	13206-3547

Count = 2

Requested Placement Date: 01/22/2020 *

Placement Worker Assigned: [Dropdown]

Request Status: [Dropdown menu with options: In-Process, In-Process, Ready for Search, Withdrawn]

Conducting the Placement Search

Once the Request Status is updated to "Ready for Search," the **Placement Search** link will be enabled for users with the SEARCH PLACE Business Function. Upon clicking this link, the search is conducted and the *Placement Resource Search Results* window displays with results that match the search criteria. Results display based on the following and in the order listed:

- Matching Optional Criteria
- Matching Borough (ACS only)
- Matching Community District (ACS only)
- Distance From Proximity Address
- Distance From School Address
- Agency Type ("D" for District or "V" for Voluntary)
- Date of last referral
- Resource ID

If no matches are found, you may wish to click the **View All** link in the **NAVIGATION PANE**.

This displays resources that match the search parameters, but are either outside of the county that created the request and/or do not have sufficient vacancies.

If the search did not provide any suitable results, you may decide to close the request. When closing a request, you will have to provide a placement action such as "No Suitable Placement Found" or "Placement No Longer Needed."

A **Comments** field is available for additional explanation.

If there are no matches for the search criteria, you will receive the following message:

"No resources match the requested criteria in the county of the placement stage. To view all resources, select View All from the left navigation pane. To change the search parameters, you must close this placement request and start a new request."

You can click the **Close Request** button and begin a new request with different criteria.

A child may have only one open request at any one time.

Maintaining Referrals for the Placement Request

The *Referral Detail* window is used to view and maintain referrals for the placement request. There is no limit on the number of referrals that can be sent. Up to 10 referrals may be sent at one time. In addition, each district/agency should determine how many resources should be explored before sending referrals.

The staff member who reviews placement requests may be a home finder, Office of Placement Administration (OPA) staff, or a supervisor of either. It is important to follow the protocol of your district/agency. Staff employed at the placing agency can maintain referrals with the SEARCH PLACE Business Function; otherwise the RESOURCE COORD (Coordinator) Business Function is required.