



Office of Children and Family Services

Family Services Stage Modernization - Phase 1 Impact Analysis

Overview

Over the course of the next year the CONNECTIONS Family Services Stage (FSS) will be modernized. As each FSS module is modernized, it will have the same “look and feel” as other parts of CONNECTIONS, such as CPS investigations, FAD, FSI, etc. With very few exceptions, FSS processes and the data entered into the FSS will remain unchanged. The navigation to and within the FSS, however, will change somewhat and may require some adjustment on the part of casework staff and other users.

Because the FSS is so large, it will be modernized in phases. The parts of the FSS that are being changed with Phase 1 include: the replacement of the Stage Composition window with the Person List window; Progress Notes, Bridges to Health (B2H), and several supporting windows. The staff that will be most affected by the changes are caseworkers and support staff who have not worked in the already modernized Investigation (INV), Family Assessment Response (FAR), Foster and Adoption Home Development (FAD), and Family Services Intake (FSI) stages, notably voluntary agency foster care and preventive services staff.

What Remains the Same

The Family Services Stage (FSS) will continue to be where caseworkers and support staff enter data, conduct assessments and document their work for ongoing services cases. With a few exceptions, the same information is recorded in the same manner as it has in the past. Likewise the security rules for accessing and modifying information in an FSS also is unchanged as are the paths to access an FSS.

What is Changing

Functions now accessed by menus or buttons will be accessed via links on the Navigation Pane on the left side of a window, as exists now on windows in INV, FAR, FAD and FSI stages. Other changes that users will see, include:

- The tabbed FSS window is being phased out. The Open FSS link on the Navigation Pane will be eliminated. Users will access the FSS modules, such as Progress Notes, FASP, Health, etc. by using the corresponding fast path links on the Navigation Pane. Note: It will be possible for users to open multiple fast paths at the same time.
- In Phase 1, the Person List window (which will replace the Stage Composition window; see next bullet) and the Progress Notes window will have the same look and feel as modernized windows in INV, FAR, FAD and FSI stages. The other FSS windows (FASP,

Education, Health, etc.) will appear as they do today until they are modernized in subsequent phases. Again, users will access these functions via the fast path links.

- The Person List window will replace the Stage Composition tab as the data entry window for person information, including the adding/relating of persons to an FSS. At present, the FSS Person List is essentially a read-only window. There are several changes that apply to Person List window for the FSS:
 - WMS information and the APP REG/ WMS Synch button will display on the window. The processes related to WMS remain the same.
 - It will no longer be possible to enter/modify information on the Person List grid; all information will be entered in fields on the Detail, Identifiers and other tabs on the window. The grid may be sorted and filtered in the same manner as other modernized grids.
 - New Search and Add Person links on the window's Navigation Pane will replace the Add/Relate button on the Stage Composition tab.
 - The Address and Phone tabs will replace the Address and Phone buttons on the Stage Composition tab to access Address and Phone information.
 - The new Multiple Person updating feature (introduced with the modernized FSI) will replace Maintain Primary Address/Phone. A checkbox column has been added to the Person List grid to permit applying data entered into various primary address and phone fields to multiple persons.
 - Paste Address and Paste Phone links will display in the Address & Phone Options Section on the Navigation Pane. When used in tandem with the Multiple Person updating feature, the links serve to replace Maintain Primary Address/Phone multiple updating.
 - Historical Person List link replaces the View Historical Stage Comp menu item. The link will only display in the Navigation Pane if a historical person exists.
 - Ethnicity and Race fields will no longer be defaulted to "Not Reported." These fields will have to be explicitly addressed by users in these required fields. "Not Reported" will continue to be a value in the drop down.
 - Additional Detail tab, activated for the FSS when the FSI was modernized, permits the entry of information pertaining to military, pregnancy, tribal affiliation and adoption data. Many staff may not be aware of this feature.
 - The tribal section, if a race of "American Indian" is selected for a child, will also enable production of a pre-filled tribal notification letter as required under the Indian Child Welfare Act (ICWA).
Note: It will still be necessary to enter Federally Recognized Tribal data on the Identifiers tab for National Youth in Transition Database (NYTD) purposes.

- Some of the links on the Person List have names that are similar but not identical to the names of buttons on the current Stage Composition tab, such as:
 - Primary/Secondary Caretaker link will replace the Caretaker button
 - Family Relationship Matrix link will replace the Relationship Matrix button
- The Progress Notes window will have the look and feel of a modernized window (as it now does for Investigation and FAR stages). Window functionality remains the same.
- The Bridges to Health (B2H) windows, in addition to the modernized “look and feel,” will have the following added features:
 - A Historical HCIA grid will replace the existing Historical HCIA window. It will display at the bottom the main B2H Wavier window when a record from the registrant history grid is selected that has a waiver transfer associated to it.
 - On the Waiver Services window, the Resource Search link will open the full Resource Search window to permit a search of the Resource Directory.
 - Upon entry to the CANS Scores window, only the Previous Scores grid will display (detail section hidden). When a record is selected, the Detail section will display the corresponding scores. Clicking the New button will display blank detail fields for data entry.
- The other FSS windows being modernized with Phase 1 are:
 - Primary/Secondary Caretaker
 - Family Relationship Matrix
 - Compare WMS/CONX data
 - Outside Participants
 - End Date Stage Involvement
 - View Family of Origin
 - Finalize Adoption
 - AFCARS Adoption Information
- A new Stage Summary will provide view only access to the FSS windows. The event “Stage Summary” will replace “Family Services Stage Opened” on Event Lists.
 Note: The event “Stage Summary” is the gateway to access INV, FAR, FAD and FSI stages as well; users will need to look at the Stage column on the Case/Stage Events grid to distinguish between the different stage summaries.

Training/Documentation and Preparation Tools

- Training via iLinc will be available approximately three weeks prior to implementation of the above noted changes. The class will take about two hours and will focus primarily on the changes to the Person List and include content on conducting proper person searches. Due to time constraints, it is only possible to offer this training to supervisors and/or resource users in districts and agencies who supervise staff that work primarily in the FSS and consequently would be the most unfamiliar with the structure of the new windows. It is hoped that these trained staff will assist their colleagues.
- A Job Aid will describe the changes noted above in more detail, including screen shots and step-by-step instructions.

- Quick Start Guides or tip sheets, targeted at specialists and support staff is also planned.

Recommendations

- For the most part, this will be an “as is” modernization of existing windows that do not entail changes to work processes or data entry. The replacement of the Stage Composition tab with the Person List window, including the need to enter data in fields rather on the Person List grid itself, represents a level of change that based on experience with similar changes that affected other CONNECTIONS stages, staff may require a brief time to adjust. This adjustment period can be significantly shortened if staff take advantage of the training and resource material that is being offered.
- It is anticipated that staff who work in Investigation, FAR and FSI stages will more easily adjust to the changes described above since they already work in the modernized Person List and Progress Notes windows. These staff will need to be made aware of the changes so as not to be “surprised” when the changes are implemented for the FSS. It is not recommended that CPS supervisors attend the iLinc training.
- Local district/voluntary agency administrators should be alert to communications and announcements from the CONNECTIONS team concerning the new FSS windows **and share that information with their staff.** Upcoming regional and on-site meetings will orient leadership staff to the new windows and provide assistance in local preparation efforts.
- Local district/voluntary agency administrators should work with CONNECTIONS regional implementation staff to arrange pre-implementation previews of the changes as well as on-site support for their staff in the weeks that follow the release of the new windows.