CONNECTIONS Tip Sheet Progress Notes: Show Instructions

Progress Notes Show Instructions Option for Participating Districts

The **Show Instructions** button on the *Progress Notes* window is only enabled for participating districts who request it. This feature is used to display the participating district's specific guidelines for composing each progress note's narrative based on the selected combination of Type, Method and Purpose.

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

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

Who can see Progress Notes Show Instructions?

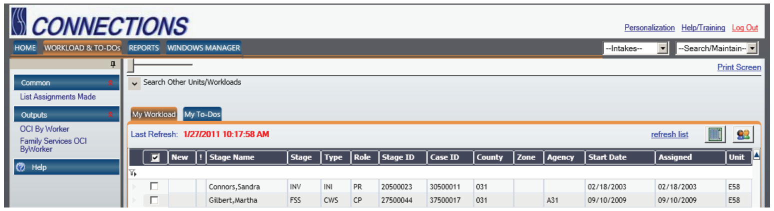
The **Show Instructions** button on the *Progress Notes* window is only enabled for participating districts who request it. Only workers creating a new note or modifying an existing note will see the instructions. Instructions are displayed in the CPS Investigation stage or Family Services Stage to the following workers:

- Any assigned worker with a role in the stage
- Any worker in the assigned worker's hierarchy
- Any worker with the ENTER PROG NOTE Business Function
- Any worker accessing a finalized (frozen) progress note to add an addendum
- Any worker assigned a Progress Notes Task To-Do

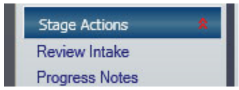
Support staff not carrying a workload must have the appropriate business functions to modify Progress Notes and view **Show Instructions**. Navigation begins with a **Case/Stage** search using the **Search/Maintain** drop-down menu. Once the desired case is selected, staff will select a stage on the **Case Summary** tab. Then, Progress Notes can be accessed from the **Specialty Path** section in the **NAVIGATION PANE**.

Navigating to Progress Notes Show Instructions

1 Select a CPS Investigation stage (INV) or Family Services Stage (FSS) on the **My Workload** tab.



2 Click on the **Progress Notes** link in the **Stage Actions** section in the **NAVIGATION PANE**.



3 To create a new note, click on the **New Note** button. To modify a note in "Draft" status, select it from the grid and click on the **Edit Note** button.

4 When creating a new note, enter the Type, Method of Contact and Purpose information on the *Progress Notes Detail* window. *The **Show Instructions** button enables at the bottom of the Progress Notes Detail window.*

***Note:** When Progress Notes are saved as **Draft** and accessed in **Edit** mode, the **Show Instructions** button remains enabled at the bottom of the Progress Notes Detail window. Once a note is saved as **Final**, the **Show Instructions** button is hidden.*

Progress Notes Show Instructions Window Operation

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

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

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

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

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

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

- Type
- Method of Contact
- Purpose

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

***Note:** When Type is "Summary" or "Supervisor/Managerial Review," Method and Purpose are NOT required to enable the **Show Instructions** button.*

CONNECTIONS Resources

OFT Customer Care Center: 1 800 697 1323

CONNECTIONS Regional Implementation Staff:
http://ocfs.state.nyenet/connect/contact.asp

CONNECTIONS Application questions:
ocfs.sm.conn_app@ocfs.state.ny.us *(NOTE: address contains an underline)*

CONNECTIONS Communications:
CONNECTIONSCommunications@dfa.state.ny.us