

Child and Family Services Plans: Access and Navigation Quick Reference Card

Children and Family Services Plans Introduction

The Child and Family Services Plans web-based application was developed in response to New York State's Lean Initiative to improve and streamline the process for submitting and approving a Child and Family Services Plan (CFSP). This Quick Reference Card (QRC) will explain how your role and editing permissions determine what you can do in the Child and Family Services Plans system, and how to log in to the system, update your user profile, and navigate the **Child and Family Services Plans Home** page.

Overview of User Roles and Editing Permissions

You will be designated to contribute to the Plan as a representative of a county or to review the Plan as a representative of the state. County users will only have access to the Plan relevant to their county; state users will have access to Plans for all counties. In addition, you will be assigned a user role that determines what you can do in the system.

User Roles

There are four user roles in the Child and Family Services Plans system:

- **Basic User:** The Basic User recommends Plan section(s) for submission/approval; edits, reviews, and adds comments to Plan sections, based on editing rights*; manages own user profile; views/uploads supporting Plan documents; and downloads and prints sections of the Plan.
- **Approver:** There are two levels of Approver: those at the state level and those at the county level. State-level Approvers grant and/or remove approvals for section(s) of the Plan. County-level Approvers submit Plan section(s) to the state for review. All Approvers manage their own user profile; view/upload supporting Plan documents; and download and print sections of the Plan for county records.
- **User Manager:** The User Manager invites new users; assigns roles and editing rights (except the System Administrator role); views users; and activates/deactivates users. County User Managers can only manage users in their county. State User Managers can manage all users.
- **System Administrator:** The System Administrator manages users; assigns the **System Administrator** role; and creates alert messages. (This role will be limited to a small number of staff.)

*Editing Rights

You will be granted editing rights to a section or sections of the County Plan. These permissions control the sections of the Plan you will be able to view, edit, and/or submit/approve.

Logging In to the Web-based Child and Family Services Plans System

To use the system for the first time, you will receive an invitation via email with a direct link to access the **Create an Account** page. You must create an account to access the system.

The following link will be provided in the email, or you can type the URL into your address bar:

<https://countyplans.ocfs.ny.gov/log-in/register.cfm>

The **Create an Account** page will display, as shown on the right. Note that all fields are required (as indicated by the red asterisk).

1. Step 1: Confirm your identity

- a. Enter your email address.
- b. Enter the invitation code that was provided in your invitation email.

2. Step 2: Set up your account details

- a. Enter your full name.
- b. Enter and then re-enter your password.

3. Once all fields are completed, click the **Create Account** button.

Create an Account

Enter your information in the form below. To register for an account in Child and Family Services Plans, you must have received an invitation code to be entered below.

* All fields are required

Step 1: Confirm your identity

The following information must match what was in your invitation email.

Email Address: *

Invitation Code: *

Step 2: Set up your account details

Name: *

Password: *

Re-enter Password: *

Passwords must be at least 8 characters long and contain 1 number.
You will be prompted to enter this password each time you log in.

Your **Child and Family Services Plans Home** page will display.

Note: You will learn more about this page in the **Navigating the Child and Family Services Plans Home Page** section of this QRC.

Child and Family Services Plans: Access and Navigation Quick Reference Card

Logging In to the Web-based Child and Family Services Plans System (cont.)

Once your account is created, you will access the Children and Family Services Plans website using the following Internet address:

<https://countyplans.ocfs.ny.gov/log-in>

1. From the **Log In** page, complete the **Email** and **Password** fields.

Note: If you forget your password, click the **Forgot your Password?** link to have a reset code sent to your email address.

2. Click the **Log In** button.

Your **Child and Family Services Plans Home** page will display.

Note: If you have trouble logging in to the system, click the **Support** ([Support](#)) link located at the bottom of the **Log In** page and then send a message with your issue to technical support. This link is accessible on all pages of the system.

Updating Your User Profile

You can update your user profile, including changing your contact information, password, and profile picture, on the **My Profile** page. You can also set up daily updates that will be emailed to you when there are changes to the Plan.

To access the **My Profile** page, click the **My Profile** link in the **Navigation Bar** located at the bottom of any page.

The **My Profile** page displays, as shown below.

To change your password, change your picture, or set daily updates, click the appropriate button to go to the corresponding page. Once you have successfully made and saved changes, the **My Profile** page will redisplay.

To update your contact information, enter the information in the appropriate field(s) and then click the **Update Profile** button to save your changes.

Note: Clicking the **Cancel** link will return you to your **Home** page without any changes being saved. Clicking the **Back to Plan** button will also return you to your **Home** page.

To set daily email updates:

1. From the **My Profile** page, click the **Set Daily Updates** ([Set Daily Updates](#)) button.

The **Set Daily Updates** page displays, as shown on the right (these pages will vary for County users and State users).

2. Click the **Yes, please send me Daily Update emails** radio button.

Note: If you do not wish to receive daily updates, select the **No, please do not send me Daily Update emails** radio button.

3. Click the **Save and Continue** button.

The **Sections that are available to follow** display, as shown on the next page.

Child and Family Services Plans: Access and Navigation Quick Reference Card

Updating Your User Profile (cont.)

Note: Clicking the expand/collapse (⌵) button(s) will expand or collapse the components of a specific Plan year.

- Select the checkbox(es) next to the section(s) of the Plan that you want to receive email updates for when changes are made to the section.
- Click the **Save and Continue** button.

The counties and agencies that are available for State users to follow display, as shown below.

Note: Clicking the **Check all...** link will select all areas within the OCFS Region in New York State.

Select the Counties / Agencies you would like to follow for each Section:

Safety / Prevention (County Plans)

[Uncheck all in Region 1](#) [Check all in Region 2](#) [Check all in Region 3](#)
[Check all in Region 4](#) [Check all in Region 5](#) [Check all in Region 6](#)

<input type="checkbox"/> Albany	<input type="checkbox"/> Herkimer	<input type="checkbox"/> Saint Lawrence
<input checked="" type="checkbox"/> Allegany	<input type="checkbox"/> Jefferson	<input type="checkbox"/> Saint Regis
<input type="checkbox"/> Broome	<input type="checkbox"/> Lewis	<input type="checkbox"/> Mohawk Tribe
<input checked="" type="checkbox"/> Cattaraugus	<input type="checkbox"/> Livingston	<input type="checkbox"/> Saratoga
<input type="checkbox"/> Cayuga	<input type="checkbox"/> Madison	<input type="checkbox"/> Schenectady
<input checked="" type="checkbox"/> Chautauqua	<input type="checkbox"/> Monroe	<input type="checkbox"/> Schoharie
<input type="checkbox"/> Chemung	<input type="checkbox"/> Montgomery	<input type="checkbox"/> Schuyler
<input type="checkbox"/> Chenango	<input type="checkbox"/> Nassau	<input type="checkbox"/> Seneca
<input type="checkbox"/> Clinton	<input checked="" type="checkbox"/> Niagara	<input type="checkbox"/> Steuben
<input type="checkbox"/> Columbia	<input type="checkbox"/> NYC	<input type="checkbox"/> Suffolk
<input type="checkbox"/> Cortland	<input type="checkbox"/> Oneida	<input type="checkbox"/> Sullivan
<input type="checkbox"/> Delaware	<input type="checkbox"/> Onondaga	<input type="checkbox"/> Tioga
<input type="checkbox"/> Dutchess	<input type="checkbox"/> Ontario	<input type="checkbox"/> Tompkins
<input checked="" type="checkbox"/> Erie	<input type="checkbox"/> Orange	<input type="checkbox"/> Ulster
<input type="checkbox"/> Essex	<input checked="" type="checkbox"/> Orleans	<input type="checkbox"/> Warren
<input type="checkbox"/> Franklin	<input type="checkbox"/> Oswego	<input type="checkbox"/> Washington
<input type="checkbox"/> Fulton	<input type="checkbox"/> Otsego	<input type="checkbox"/> Wayne
<input checked="" type="checkbox"/> Genesee	<input type="checkbox"/> Putnam	<input type="checkbox"/> Westchester
<input type="checkbox"/> Greene	<input type="checkbox"/> Rensselaer	<input checked="" type="checkbox"/> Wyoming
<input type="checkbox"/> Hamilton	<input type="checkbox"/> Rockland	<input type="checkbox"/> Yates

Save Selections > [Cancel](#)

- Click the **Save Selections** button to save your changes. A summary of your selections displays.

Note: Click the **Update Selections** button to revise your selections.

Select which Sections you would like to follow:

2021 Plan ⌵

County Plans

Certification Requirements

Signature Page and Attestation

Strategic Component

County Overview

Safety / Prevention

Permanency / Prevention

Permanency / Family First

Foster/Adoptive Parent Recruitment and Retention Plan, 18 Month Update

Youth and Young Adult

Runaway and Homeless Youth Services

PINS Diversion Services

Adult Services

Technical Component

Child Care

Non-Residential Domestic Violence Services

PINS Pre-dispositional Placement Services

T and U Visa Reporting

Appendix F

Title XX Program Services Matrix

Local Agency Plans

Strategic Component

Foster/Adoptive Parent Recruitment and Retention Plan, 18 Month Update

2020 Plan ⌵

2019 Plan ⌵

2018 Plan ⌵

Save and Continue > [Cancel](#)

Your selections have been saved.

Steps: **Overview** - Opt in - Select sections - Select organizations

Here are your current Daily Update selections:

Send me Daily Update emails: Yes

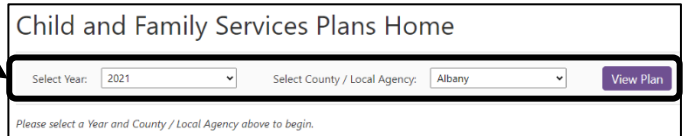
Plan Year	Section	County / Agency
2021	Safety / Prevention	Allegany County
2021	Safety / Prevention	Cattaraugus County
2021	Safety / Prevention	Chautauqua County
2021	Safety / Prevention	Erie County
2021	Safety / Prevention	Genesee County
2021	Safety / Prevention	Niagara County
2021	Safety / Prevention	Orleans County
2021	Safety / Prevention	Wyoming County

Update Selections >

Child and Family Services Plans: Access and Navigation Quick Reference Card

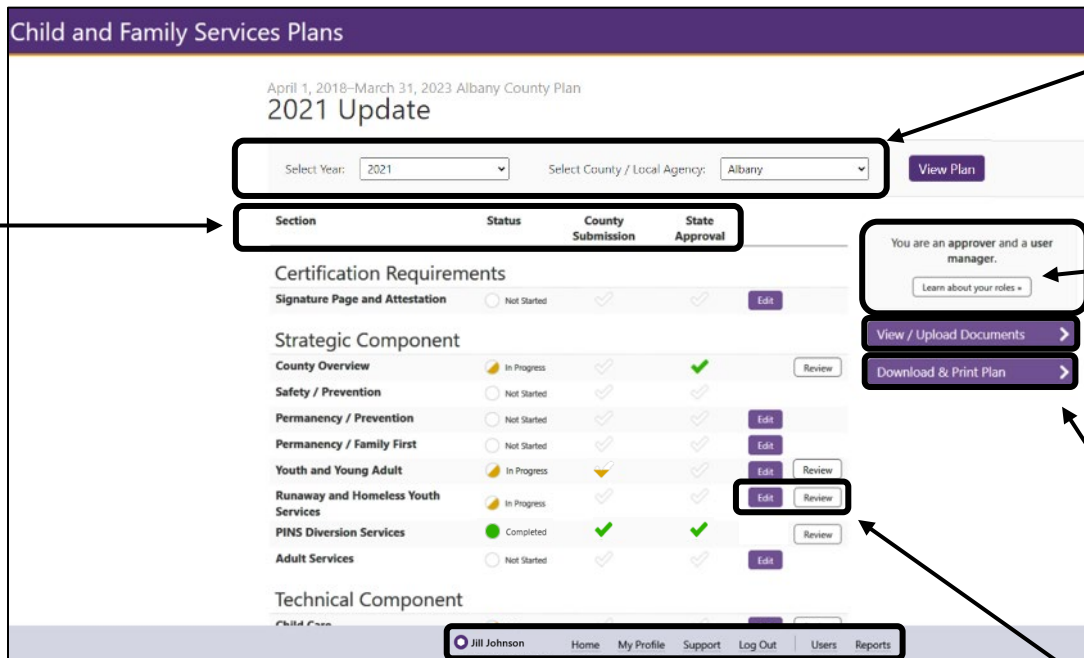
Navigating the Child and Family Services Plans Home Page

Note: As a state user, you will first need to select a Plan year and county from the drop-down menus, then click the **View Plan** button to view the **Home** page for the county selected.



The **Home** page provides access to the section(s) of the Plan you have been given permission to edit and/or review.

The example below depicts a county User Manager with both editing and review/approval permissions.



To view a Plan from a previous year, select a year from the **Select Year** drop-down menu, select a county from the **Select County** drop-down menu, and click the **View Plan** button.

Click the **Learn about your roles** button to learn more about your role(s) and access additional Help files.


Click the **View/Upload Documents** button to display the **Plan Documents** page, where additional documents for the Plan are uploaded.

Click the **Download & Print Plan** button to display the **Download & Print Plan** page, where a PDF of Plan sections can be generated.

An **Edit** button displays for the Plan section(s) you have editing rights to; click the button to navigate to that section of the Plan in edit mode.

Click a **Review** button to display the Plan section in read-only format. A user with approval rights will be able to submit or approve the section.

- The **Section** column displays the name of the county Plan section.
 - The **Status** column displays the status (**Not Started**, **In Progress**, or **Completed**) of the Plan section.
 - A **green** checkmark in the **County Submission** column indicates the section was submitted for review by the county.
 - A **green** checkmark in the **State Approval** column indicates the section was approved by OCFS.
- Note:** An **orange** half-checkmark in either column indicates a user has recommended the Plan section for submission or approval.

- The **Navigation Bar** contains links that will vary, depending on your role. For example, **Basic Users** will not see the **Users** link in their **Navigation Bar**. Click a link in the **Navigation Bar** to go to the corresponding page.
- Click the **Log Out** () link to log out of the Child and Family Services Plans system and return to the **Log In** page.

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