

Office of Children and Family Services
CONNECTIONS Project

Impact Analysis

Subject: MAINTAIN EDUCATION Business Function

Functional Area: Education and Security

Brief Description of Current Function/ Process:

The Education Tab allows the recording of basic information about a child's educational status. Sometimes the individual responsible for recording in this tab is an education specialist who has no responsibility for or need to be involved in other areas of the child's care or service provision. Currently, the only way to enable education specialists to record information in the Education Tab is to grant them a role in the case, which results in their having access to the entire record (except Health Services). Such broad access is often inappropriate, as education specialists generally have no need to know about other facets of the child's circumstances and casework activities regarding the child or his/her family.

What Remains the Same:

A worker with a role in a stage will continue to have view and maintain access to the Education Tab within that stage. All of the education functionality remains the same. For those districts where education information is entered by case managers, case planners or case workers and not by specialists, no change is necessary.

What is new or changes:

In order to provide local districts and agencies with the option of limiting access only to the Education Tab, a new, MAINT EDUCATION Business Function has been created and will be activated with the implementation of Q2-08 (Build 18.9.7). This Business Function will enable districts and agencies to grant education specialists access only to the Education Tab and prevent them from accessing other parts of the record. The new Business Function will work in a similar manner to those which can be granted to health specialists and to workers who only record progress notes. The MAINT EDUCATION Business Function must be assigned by an agency's security coordinator.

Implications/Considerations:

- The guidelines for the assignment of the MAINT EDUCATION Business Function are attached to this impact analysis.

- When assigning the MAINT EDUCATION Business Function, local districts and agencies that use Agency Access will need to take certain actions to properly limit access.
 - **Do not** make the user Case Assignable
 - **Do not** make the user a unit approver
 - **Do not** put the user in a supervisory unit in the Organizational Hierarchy
 - **Do not** give the user a Job Type
- Whether or not a local district or agency uses Agency Access, be aware that education specialists who have been granted roles in stages prior to Q2-08 will continue to have access to the full records for those cases. Therefore, these workers should be unassigned from those stages if the agency intends to use the new Business Function and limit access only to the Education Tab.
- Education specialists who were granted a role in a stage to enable them to record education information have previously gained access to the case from their Assigned Workload. Once they have been unassigned from the stage and granted the MAINT EDUCATION Business Function and the CASE SEARCH or CASE/PERS SRCH Business Function, they will no longer see the stage on their workload. They will need to access the record by doing a case search. The full access path for these staff will be: Case Search > Case List > Case Summary > Select Stage > Options > Stage Maint. > Maintain Education.

Recommendations:

- The Security Coordinator should be conversant with the new MAINT EDUCATION Business Function the guidelines for which are attached.
- Grant the new Business Function to education specialists who will need it to continue or start recording in the Education Tab.
- Unassign education specialists from stages where they have been given a role purely to enable them to record education information.
- Education specialists should be instructed on how to access the stages for which they are maintaining educational information through case search.
- If the local district or agency uses Agency Access in its security framework, ensure that none of the characteristics noted in the first bullet of the previous section have been assigned to these workers.

Business Function (BF)	Security Attributes	Description	Recommendations	Comments	Agency Access Considerations
MAINT EDUCATION	Enter Education	<ul style="list-style-type: none"> • MAINT Education BF works in conjunction with the Case Search (if Voluntary Agency) <u>or</u> the Case/ Pers Srch BF (if LDSS), i.e. the user must have both to access Education (without a role). • Path: Case Search > Case Summary->Options menu -> Stage Maint menu -> Maintain Education menu item (opens in Modify mode unless stage is pending closure). • The Maintain Education menu item on the Case Summary window will be enabled when: <ol style="list-style-type: none"> 1. Worker has the Business Function "MAINT EDUCATION" 2. Worker has selected an open FSS stage with 	It is recommended that a staff person who has responsibility for the entry of education information, but no other responsibility for the stage, should be given this Business Function.	<ul style="list-style-type: none"> • The <i>district</i> of the case includes the district or agency of a worker with a role (CM, CP, CW). • Office Types: District / Voluntary Agency/ RO/ DJJOY (DFY) / CQC / OMH/ OMRDD • MAINT EDUCATION BF is not needed if the worker has a role in the stage. • There is no maintenance permitted of Education information once a stage is pending closure or closed. 	<p>When the district or agency uses the Agency Access Window settings, in order to prevent someone with the MAINT EDUCATION BF who is only intended to access Education Dialog from this path, from accessing events on the Case List window, the district or agency will need to take action make sure that all of these apply to the user. The user is:</p> <ol style="list-style-type: none"> 1. Not Case Assignable and 2. Not a Unit Approver and 3. Not in a Supervisory Unit in the Organizational Hierarchy and 4. Does not have a Job Type <p>If this is done, and your Agency Access settings change the user will still not be able to access events. Refer to the Guide to Using the Maintain Agency and Organizational Hierarchy Functions in CONNECTIONS and the</p>

Business Function (BF)	Security Attributes	Description	Recommendations	Comments	Agency Access Considerations
		<p>stage type of CWS or CCR or ADVPO.</p> <p>3. Worker is from the same district/local agency as one of the workers assigned to the stage (CM, CP, CW).</p> <ul style="list-style-type: none"> • For stages pending closure, the worker with the MAINT EDUCATION BF will enter in browse mode only. • There is no access to closed stages with the MAINT EDUCATION BF. 			<p>CONNECTIONS Step-by-Step Guide: Security for more information</p>