

Build 18.1 Case Assignability and Business Functions Changes for Default Conversion Units

Build 18.1 included a change that changed CONNECTIONS functionality so that the system no longer allows workers in Default Conversion units (Units created through the process of adding staff using Webstar), who have the generic Person, Conversion (PID 18012) as the Unit Approver, to be made Case Assignable or to be assigned Business Functions. Most Units beginning with N are default Conversion Units. Build 18.1 also included a data change that removed case assignability from all staff in these units.

Please note that these N units have nothing to do with the Conversion workers used for cases converted from WMS for B18 Case Management implementation (identified as Worker [A01] A (or G or M or S), B18 Conv).

When new staff is added to an agency or district, they are initially assigned to the 'default Conversion' unit. In addition, there are workers who are currently in the conversion units who have been in CONNECTIONS for some time, but have not yet been moved to their work units where they actually do their work. Any staff, whether new or not, will need to be moved to their actual units in order to be made case assignable.

Background:

Default units are created for putting new staff in when they are added to CONNECTIONS. Default units are automatically populated with a generic Conversion Person (PID 18012), who serves as the Unit Approver. After Build 18.1, when a user is added to CONNECTIONS and placed into one of these default conversion units, he or she will not be Case Assignable and will have only Standard Access as a Business Function.

Prior to Build 18.1, a worker in a default Conversion unit could be made Case Assignable by a user in the district with the Business Function "Maintain Staff", and could be given Business Functions by a user in the district with "Maintain Security". New cases could then be assigned to the staff that remained in the conversion unit.

For CPS cases, the stages were automatically submitted to the Unit Approver for approval. LDSS workers have managed this process for CPS, but with the implementation of Build 18 and Case Management, the fact that this process might impact voluntary agency staff that were not as familiar with CONNECTIONS became apparent. Workers in the Conversion Unit, who were Case Assignable and had Business Functions to do their day-to-day work on their workloads, could be assigned Family Services Stages (FSS). One of the functions required in the FSS is the development of the Family Assessment and Service Plan (FASP). Approval of the FASP needs to be done by the Unit Approver for Voluntary Agencies, and can be done by the Unit Approver of the Case Manager. The (generic) Person, Conversion who is the Unit Approver in all of the default Conversion units could not approve the FASP. This would have meant that the FASP's done by staff in these default conversion units could not be approved, since there was no real Unit Approver.

Changes to CONNECTIONS:

To correct this situation, changes to both code and workers went into Production with Build 18.1. The following reflects what was changed in CONNECTIONS.

Changes to Staff Security:

Staff 'IN' assigned to Conversion units with Person, Conversion (PID 18012) as Unit Approver:

- Can continue to work on current assigned cases on Workload
- Cannot be allowed to be Case Assignable
- Cannot be assigned new cases
- Cannot be given any new Business Functions (other than the automatic Standard Access)

Changes to Unit Detail window:

Conversion units with Person, Conversion (PID 18012) as Unit Approver:

- Cannot have staff added to the unit. The Staff Search pushbutton will remain disabled, preventing addition of staff to this unit

Changes to Staff Detail:

Conversion units with Person, Conversion (PID 18012) as Unit Approver:

- Case Assignable check box will be disabled, preventing assigning this function to members in this unit
- All staff in the unit are no longer Case Assignable

Process for moving staff from the Default conversion unit to their permanent Unit:

The Security Coordinator, or the user with the "Maintain Unit" Business Function, must review the staff list in each Default Conversion unit in their agency or district. Then, for each person in the unit, either end-date them or move the staff person to their permanent unit. This is done by first accessing the permanent unit through Maintain Unit, selecting the unit, selecting Staff and "IN" assigning the new staff to the new permanent unit. A staff person can only be "IN" assigned to one unit at any given time, so the "IN" assignment to the Default Conversion unit will be ended upon successful re-assignment to the new unit.

Once the staff person is assigned to a permanent unit, the Security Coordinator or user with "Maintain Staff" can check the "Case Assignable" box for that worker. This is done on the Staff Detail window. The Security Coordinator or user with the "Maintain Security" Business Function can assign Job Type and Business Functions to the new staff person via the Staff Security window.

Actions Required:

The Security Coordinator or user with "Maintain Unit" MUST move all employees from the conversion unit to a permanent unit, following the process detailed above. This must be done for both the current staff in these units, and any new staff added to CONNECTIONS at any time in the future.

The Security Coordinator or worker with "Maintain Staff" can only establish that the employee's is Case Assignable on the Staff Detail window after they are moved from the default Conversion unit.

The Security Coordinator or worker with “Maintain Security” can only establish an employee’s Business Functions and Job Type on the Staff Security window after the staff has been moved from the default conversion unit.

Workers affected by change:

There are were 78 workers in ‘default Conversion’ units who were case assignable prior to the implementation of Build 18.1 who had open stages on their workloads. After Build 18.1, these workers will not be able to receive any NEW stage assignments. They can continue to work on the cases in their workload. These workers need to be moved to ‘real’ units as soon as possible so that they can be assigned new cases if appropriate. Any district or agency that has any of these 78 staff in a unit with the generic Person, Conversion (PID 18012) as the Unit Approver will be contacted by CONNECTIONS Implementation staff to discuss moving or end-dating the staff in those units.

Some of the workers in conversion units who have caseloads assigned to them are original Conversion Workers. They are identified with the name of (first) FADH (last) Agency Code-Agency (e.g. FADH A66-Agency). In these situations, any converted FAD stages that represent active homes should be reviewed and assigned to real workers.

Additionally, there are approximately 7,000 users who are assigned to a ‘conversion’ unit who previously were case assignable, but had no stages assigned. With the migration of B18.1, these workers are no longer case assignable. The list of these workers will be put in the folder where the multiple person report is placed for each agency: fnphsen0a1ah\groups\Connections\Build 18, by the end of next week.

If a district or agency wants to see if they have any staff in the units with the Person, Conversion (PID 18012) as a Unit Approver, anyone in the district or agency with Maintain Unit can review all units to determine the units that have the default conversion worker as a unit approver. Another option is for a person in the district or agency to go into the Data Warehouse and use the Unit Approver report to see the units with the Person, Conversion (PID 18012) as the approver.

Workers must be moved out of the Conversion unit to their appropriate unit to be assigned any stages, including Case Management FSI and FSS stages.

End-dating staff and Deleting Units:

For further information regarding these issues you can refer to the Security Step-by-Step Guide on the Security page of the CONNECTIONS website. The address of the site is:

<http://ocfs.state.nyenet/connect/>.

To end-date staff, see the directions on page 53 in the Security Step-by-Step Guide.

After all of the staff in the default unit are end-dated or moved, the unit should be deleted. To delete a unit, see the directions on page 65 of the Security Step-by-Step Guide.

If you have any questions contact your respective CONNECTIONS Regional Field Staff person.