



# CONNECTIONS Tip Sheet

July 2016

## Creating an On-Call Unit for Accepting After-Hours SCR Reports

As districts move toward receiving after-hours SCR reports on-line, they may need to provide a number of staff access to these reports. This tip sheet covers one way of constructing a specialized unit for that purpose.

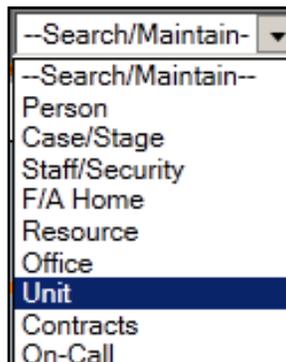
### Business Requirements

- The district would like on-line access to after-hours reports rather than having report information dictated to them over the phone by SCR staff. With on-line access, workers can immediately check history in CONNECTIONS.
- Multiple workers, possibly from different units, need to access and accept incoming after-hours SCR reports.
- On-call workers do not need additional access to the Workloads/To-Dos of other on-call staff.
- The on-call schedule should not require constant updating.

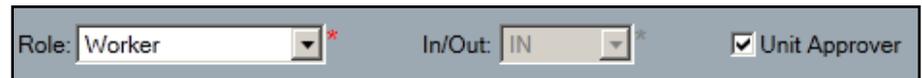
### Solution: Creating an On-Call Unit

Choose a single worker to receive all after-hours reports and grant others access to this worker's workload by making them all designees of that worker.

1. Use the Search/Maintain pull-down menu to select **Unit**.
2. Create a new unit (or repurpose an old, no longer used unit) as the on-call unit.
3. In-assign, and grant the role of Worker



to the person whose workload will be receiving SCR reports. You do not need to add additional staff to this unit.

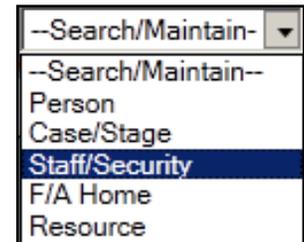


4. Assign Unit Approver status to this worker



**IMPORTANT!** Because all other on-call workers will become this worker's designee and thereby will inherit the same level of security assigned to this worker, the worker chosen to have SCR reports assigned to their workload should have only limited business functions and access within CONNECTIONS.

5. Use the Search/Maintain pull-down menu to select **Staff/Security**.
6. Assign the worker the UNIT SUM ACCESS (Unit Sum Access) business function

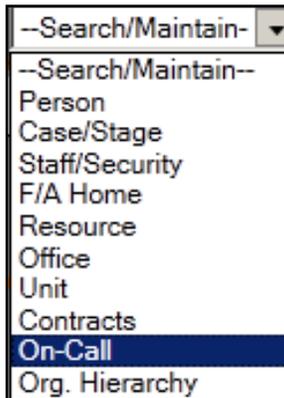


7. Make all on-call staff a designee of the Unit Approver. (Done by the Security Coordinator.) This will grant on-call workers access to this unit and to the workload of the unit approver via the **Search Other Units/Workload** button.



**Note: While Supervisors are usually familiar with this path, line staff may need to be trained. See navigational directions below.**

- Use the Search/Maintain pull-down menu to select **On-Call**. (Done by the staff with the Maint On-Call business function.)
- On the On-Call schedule, list this Unit Approver as the person to receive all incoming reports for the desired shifts/blocks.

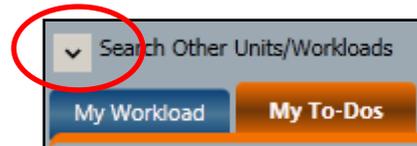


 See the CONNECTIONS Tip Sheet, *Creating/Maintaining the On Call Log Schedule*, for more information on this process.

### To Access an Intake on Someone Else's Workload

Workers assigned the UNIT SUM ACCESS business function (directly or by being a Designee of someone assigned this business function) will see "Search Other Units/Workloads" above the *My Workload* and *My To-Dos* tabs on their main CONNECTIONS screen.

- Click the Expand icon to open the Unit Search window.



Fields in the search box prefill with information from your In-assigned unit.

 A screenshot of the "Search Other Units/Workloads" search form. It contains the following fields: Agency: A31, Site: 3Q1, Zone: (empty), Unit: CPG. There are "Search" and "Clear" buttons.

- Enter the correct Site, Zone (if any) and Unit information.
- Click the **Search** button.
- Highlight the name of the worker whose Workload or To-Dos you wish to access.

- Click the **OK** button at the lower right of the grid to open the Workload.
- Newly assigned stages appear with a red Y in the New column of the workload grid.

	New	!	Stage Name	Stage	Type
			Adams, Maggie	INT	INI

- Highlight the Intake to enable the Stage Action links in the NAVIGATION PANE.
- Review and Accept/Reject the intake according to usual local procedures.

**Note:** *Security in CONNECTIONS is a complex topic and may require solutions custom tailored to a district's specific business processes. For additional help with CONNECTIONS security, contact your Regional CONNECTIONS Implementation staff.*



### Resources

- CONNECTIONS Job Aids and Tip Sheets: <http://ocfs.state.nyenet/connect/jobaides/jobaides.asp>
- CONNECTIONS Regional Implementation Staff: <http://ocfs.state.nyenet/connect/contact.asp>
- CONNECTIONS Application Help Mailbox: [ocfs.sm.conn\\_app@ocfs.state.ny.gov](mailto:ocfs.sm.conn_app@ocfs.state.ny.gov) (NOTE: address contains an underline)
- CONNECTIONS Communications Mailbox: [connections@ocfs.ny.gov](mailto:connections@ocfs.ny.gov)

ITS Enterprise Service Desk  
1-800-697-1323