



*In CONNECTIONS, Workers are assigned to virtual units to create an agency structure. The structure of a unit determines such things as to whom work is sent for approval and whether staff can access the Workload or To-Dos of other workers. **In order to make changes in units or unit assignments, a worker (usually the Security Coordinator) must be assigned the Maintain Unit (MAINT UNIT) business function.***

Unit Basics

Naming Units

- Each unit is identified by an Agency code, Site code and Unit name. Zone is an optional designation used almost exclusively in NYC.
- Each unit must have a unique name (unit name and site code combination) within the organization.
- Unit names can contain up to three letters and/or numbers (e.g.: "004", "CPS", "JD1" or "06A")

In and Out Assignments

- Staff are either in- or out-assigned to units. Every worker must be in-assigned to one unit. If access to additional units is required, they are out-assigned to those additional units.



When work is submitted for approval, it goes to the Unit Approver of the unit where a worker is In-assigned.

- In-assigning a worker to a unit removes them from the unit where they were previously in-assigned.
- Units may contain up to 50 members

Role: *

- Manager
- Maintainer
- Supervisor
- Worker

Roles

- There are four possible roles within any unit.
- From lowest to highest, the roles are: Worker < Supervisor < Maintainer < Manager

- **Role names do not necessarily correspond with job titles** – they are simply reflect the hierarchy of that particular unit and are used in conjunction with the UNIT SUM ACCESS (Unit Summary Access) business function to grant access to the workloads/To-Dos of others within the unit.

Unit Approvers

- Each unit must have a member designated as the Unit Approver.
- There can be only one Unit Approver per unit
Typically, the Supervisor of a given unit is designated as the Unit Approver.
- The same person can be the Unit Approver of more than one unit.
Since staff can only be In-assigned to one unit, the Unit Approver would be in-assigned to one unit and out assigned to the other unit(s).
- You must remove the Unit Approver designation from one approver (uncheck the Unit Approver checkbox and click the **Modify** button) before you can designate another person in the unit as the Unit Approver.

Role: * In/Out: * Unit Approver

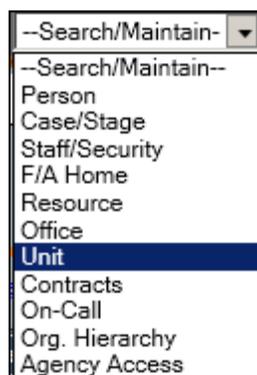
- Staff cannot be end-dated in CONNECTIONS until their Unit Approver status has been reassigned.

Searching for Units

NOTE: All users may search and view units in CONNECTIONS. However, only staff assigned the Maintain Unit business function are able to create or make changes to units and unit assignments.

To locate existing units, use the **Search/Maintain** pull-down menu in the upper right corner of the CONNECTIONS screen.

1. Select "Unit" to open the Unit Search window. The Agency field pre-fills with your agency's code, but is modifiable.
2. Click the **Search** button to display all units for your agency. You can narrow the search by entering additional criteria such as a Site, Zone and/or Unit name before clicking the Search button.
3. In the Unit List grid, highlight a unit to open the Detail tab and view the workers assigned to that unit.



Navigation Hint: You can click on the grey box to temporarily collapse the Unit List grid



Adding a New Unit

REMINDER: The Maintain Unit business function is required in order to create or make changes to units or unit assignments.

1. Use the **Search/Maintain** pull-down menu to select "Unit".
2. On the Unit Search window, enter the Site, Zone (if appropriate) and a unique unit name (Unit) in the corresponding fields.
 - **REMINDER:** Zone is not a required field. It is used primarily by the districts in New York City.
3. Click the **New** button to create the Unit.
4. On the resulting Detail tab, re-enter the unit name and choose a Specialization from the pull-down menu. Both

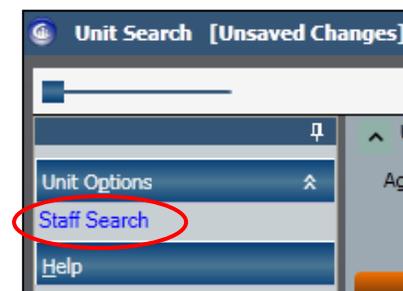
fields are marked by red asterisks (*), indicating they are required fields.

- Click the **Save** button.

You will now need to add staff to the unit and designate a Unit Approver, using the steps in the following section.

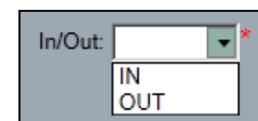
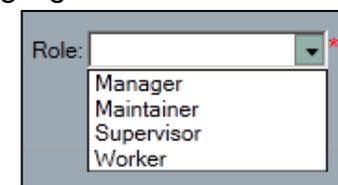
Adding Staff to Units

1. From the Unit Search window (Search/Maintain>Unit), click the **Search** button to display all units for your agency. You can narrow the search criteria by entering a Site, Zone (if any) and/or Unit name before clicking the **Search** button.
2. Highlight the unit to which you wish to add staff to open the Unit Detail tab.
3. In the left navigation pane, click the **Staff Search** link to select staff for the unit.
4. In the Staff Search window, enter the last name of the person you wish to locate.



Hint: If your district/agency is small, you can effectively search by typing only the first few letters of the person's last name. The results will include only those staff in your agency whose last name begins with those letters.

5. Highlight the correct staff person and click the **OK** button in the lower right below the Staff List grid. You will be returned to the Member Information grid in the Unit Detail tab, with the name of the selected staff person highlighted.
6. Use the **Role** pull-down menu to select a role for the person.
7. Select in- or out-assigned, as appropriate.
8. Click the **Modify** button, then the **Save** button.





Since staff can only be in-assigned to one unit at a time, In-assigning someone who is already In-assigned to another unit will remove them completely from that unit and move them to this unit.

REMINDER: You cannot move a person who is the Unit Approver without first reassigning the Unit Approver designation.

Deleting Units

When users are added to CONNECTIONS they are assigned to a temporary unit called a “Conversion Unit” (e.g. “N01”) The Unit Approver of a conversion Unit is the out-assigned “Conversion, Person”. Once the new staff person has been moved (in-assigned) to a permanent unit, the Conversion Unit must be deleted. Other units that are no longer needed and do not have a history of stages associated with them should also be deleted.

In order to delete a unit:

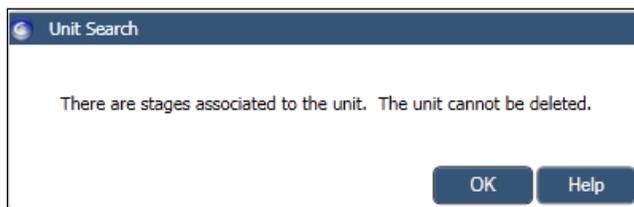
- ✓ It must have a unique, non-duplicated name.
- ✓ The last person assigned to it must be out-assigned.

If needed, the Security Coordinator can temporarily out-assign themselves to a unit to meet this criterion.

- ✓ It may not have a history of case assignments.
- ✓ It cannot have subordinate units (created using Organizational Hierarchy security).



IMPORTANT: Some units can never be deleted because they have a history of case/stage assignments and form an important link to locating these past cases/stages within CONNECTIONS. You will receive a pop-up message if you attempt to delete a unit that cannot be deleted.



HINT: If you have units that cannot be deleted, but wish to move them to the bottom of your list of active units, rename them with letters near the end of the alphabet such as “ZZZ”, “XX1” or “Y02”.

To Delete a Unit:

1. Highlight the last out-assigned member(s) and click the **Delete** button. This should enable the *Delete Unit* link in the left navigation pane.
2. Click the **Delete Unit** link.
3. Click “**Yes**” to the question of whether you want to delete the unit.

If the *Delete Unit* link does not enable:

1. Click the **Reset** button to add the last member(s) back into the unit.
2. Click the **Yes** button to the pop-up window asking, “Do you want to reset? Unsaved data and/or narrative(s) will be lost.”
3. Click the **Save** button
4. Highlight the unit name and change it to a name, not already in use, that consists of *three numbers* (e.g. “999”).
5. Click the **Save** button.
6. Repeat the steps above to delete the unit.

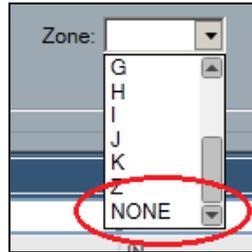


Removing a Zone Designation

Originally, once a unit had been assigned a Zone designation, even if in error, there was no way to remove it. Now, however, a Zone designation can be removed.

1. From the **Search/Maintain** drop-down menu, select “Unit” to open the Unit Search window.
2. Click the **Search** button to display all units for your agency. You can narrow the search criteria by entering a Site, Zone and/or Unit name before clicking the Search button.

- In the Unit List grid, highlight the unit from which you wish to remove the Zone designation.
- In the Zone field, scroll to the bottom of the list and select "NONE".
- Click the **Save** or **Save & Close** button.



Unit Q & As

How many units do I need?

- Often, virtual units in CONNECTIONS mirror their real life counterparts; each Supervisor is assigned as Unit Approver to the unit of staff they supervise and whose workloads/To-Dos they are given the security to access.
- If a Supervisor supervises the work of more than one group of workers, all workers could be placed in one virtual unit - or, the Supervisor can be made the Unit Approver of more than one virtual unit (in-assigned to one, out-assigned to the others).



HINT: Large numbers of staff assigned to a single unit may make locating a worker within the unit more cumbersome as, for example, when a new case is being assigned.

To quickly locate a particular staff person in a large unit, you can type a few letters of their last name in the white filter bar.

Staff List							
Name	County	Work Phone	Ext	Person ID	Logon ID	Type	
f							
Fahey, Catherine	State Central Register			37337599	YT2001	State	
Fannin, Deborah	State Central Register			31906694	MJ9290	State	
Fedorwich, Connie	State Central Register			27435542	AD3451	State	

- Senior Caseworkers may be made the Unit Approver of a unit of staff whose work they are responsible for approving. Their Supervisor may also be added to this unit with a role above that of the Unit Approver and the UNIT SUM ACCESS

business function in order to access the workload and To-Do's of everyone in the unit. Alternatively, the Senior Caseworker and line staff could be in-assigned to this unit and out-assigned to the Supervisor's unit.

Please see the CONNECTIONS Security Tip sheet "Accessing Someone Else's Workload & To-Dos" for more on this topic.

Can I reuse units that cannot be deleted?

- Yes. Non-conversion units that cannot be deleted because they have a history associated with them can be re-named and reused when the need for a new unit arises.

General Security Reminders

CONNECTIONS security is a complex topic. There are many options for granting access to the confidential information users need to perform their assigned duties. Please remember to:

- Provide the minimal amount of access necessary for staff to perform their authorized tasks.
- Instruct staff that they should access *only what is needed* to perform their assigned duties.
- Remove access when it is no longer needed.
- Review access settings at regular intervals (at least yearly) to keep security settings appropriate to job duties.

Reminder: *In all areas of CONNECTIONS, you can press F1 for help*

Resources:

CONNECTIONS Step-By-Step Guides:
<http://ocfs.state.nyenet/connect/jobaides/>

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

NYS ITS
 Customer Care Center
 Help Desk #
 1.800.697.1323