CONNECTIONS Security Tip Sheet

Removing a Worker from CONNECTIONS

November 2013

Just as adding a user to CONNECTIONS is a multiple step, multi-system process, removing a user from CONNECTIONS also involves steps in both the CONNECTIONS and Webstar systems. It requires coordinated efforts between the worker's supervisor, the CONNECTIONS Security Coordinator and the Local Security Administrator (Webstar). This Tip Sheet outlines the basic steps necessary to remove a worker's account.

Security Reminder:

Technological advances have made it possible to access CONNECTIONS directly over the internet using a computer, laptop, notebook, iPad or even a cell phone. Once a worker leaves employment, it is essential that their access to the protected and confidential information contained in CONNECTIONS be revoked as soon as possible.

Disabling a worker's HSEN account in Webstar will remove such access while preserving their CONNECTIONS account and their HSEN email account for additional actions.

Preparing to End-date a User in CONNECTIONS

The process of removing a user account consists of two steps; end-dating the worker in CONNECTIONS and deleting their HSEN account in Webstar.

Before a worker can be end-dated in CONNECTIONS, the following conditions must be met:

- ✓ Their workload must be empty
- ✓ All To-Dos must have been completed, transferred or deleted
- ✓ If the worker is a Unit Approver, their Unit Approver status must be re-assigned

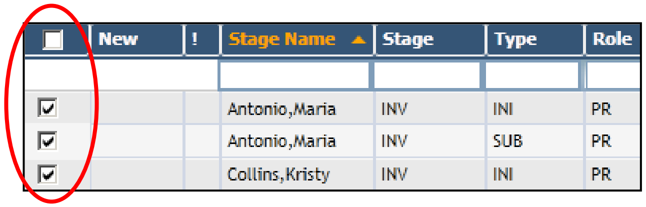
Reassigning and Unassigning Workload Stages

These steps are done by a person with access to the worker's workload - typically the worker's Supervisor.

To Reassign Stages to Another Worker's Workload:

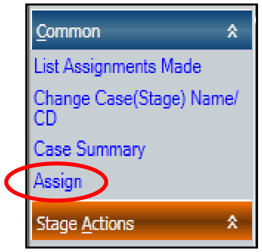
1. Navigate to the workload of the worker who has the stage.
2. Check the checkbox next to the stage you wish to reassign.

   To select multiple stages, click the checkboxes of each desired stage.



   NOTE: You may only multi-assign to the *same role* (e.g. CW) and the *same type of stage* (e.g. CWS, ADPVO, FAR). For INV stages, you may only multi-assign Primary roles.

3. Click the *Assign* link in the left navigation pane.



4. On the Assign window, you may select a staff person in the Available Staff grid or use the *Staff Search* link in the left navigation pane to add a staff person to the grid.

   NOTE: Only staff marked as Case Assignable will display on the Assignable Staff Grid.

5. With the name of the staff person to receive the assignment highlighted, click on the button that corresponds to the role you wish to assign them. That person will be added to the Assignments grid in the lower part of the window.

Assigning a new Primary, Case Manager or Case Planner role will automatically unassign the current worker from that role.

For Case Worker, CPS Worker Monitor or Secondary roles or for the elimination of the Case Planner role, follow the steps below:

To Unassign Stages:

1. Navigate to the workload of the worker who has the stage.
2. Select the stage you wish to unassign.
3. Click the *Assign* link in the left navigation pane.
4. In the Assign window, highlight the current worker's name in the Assignments grid.
5. Click the **Unassign** button.
6. Click the **Save** or **Save & Close** button to save the changes.

NOTE: The last role in a stage (e.g. Case Manager, Primary) cannot be unassigned; the stage must be closed to remove the last worker. If a stage is to remain open, it must be assigned to another worker before the worker you wish to end-date can be unassigned.

Clearing To-Dos

If a worker has not cleared their To-Dos before leaving, these steps would be done by a person with access to them - typically the worker's Supervisor.

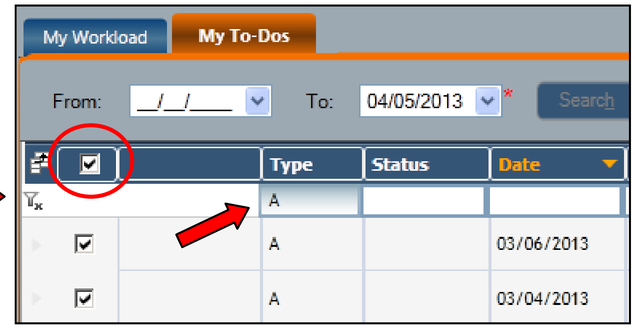
- Alert (A) and Reminder (R) To-Dos may be deleted if no longer needed.
- Task (T) To-Dos must either be completed, have a completion date entered or be reassigned to another worker.

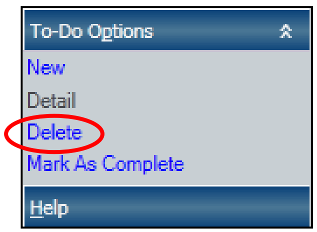
Hint: The process of unassigning workload stages creates Alert To-Dos, so it is most efficient to reassign the worker's workload *before* deleting their To-Dos.

Deleting Alert or Reminder To-Dos:

1. Navigate to the worker's To-do Tab.
2. Check the checkbox(es) of the To-Do(s) you wish to delete.

Hint: For Alerts or Reminders, use the filter bar to display one type of To-Do, then use the checkbox in the header row to checkmark all of these To-Dos at once.



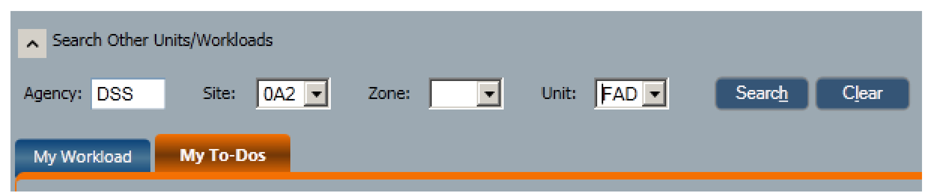


3. Click the *Delete* link in the navigation pane to delete all the selected To-Dos.

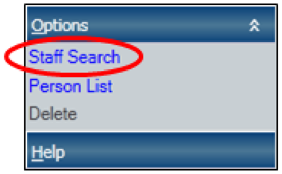
Reassigning a Task To-Do:

Task to-Dos can only be reassigned by the Unit Approver of the worker's unit – typically, their Supervisor.

1. Use the Unit Summary (Search Other Units/Workloads) path to navigate to the worker's To-Do Tab.



2. Check the checkbox of the To-Do you wish to reassign.
3. Click the *Detail* link in the left navigation pane.
4. In the left navigation pane of the To-Do Detail window, click the *Staff Search* link.

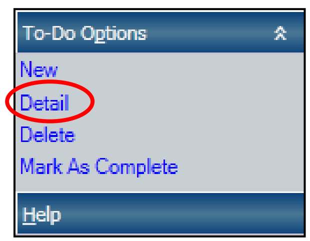


5. Enter your search criteria and click the **Search** button.
6. From the resulting Staff List, select the person to whom the To-Do will be assigned.
7. Click the **OK** button to the lower right of the Staff List.
8. Click the **Save & Close** button on the To-Do Detail window.

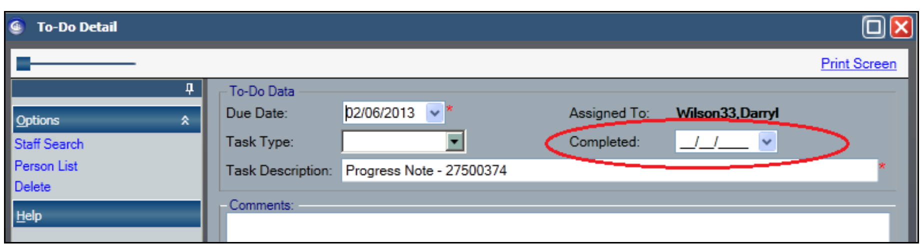
<u>Marking Task To-Dos as Complete:</u>

Task To-Dos created with a Task Type of Progress Note cannot be deleted by use of the *Delete* link. To remove them, a completion date must be entered in the *Detail* window:

1. Navigate to the worker's To-do Tab.
2. Highlight the Progress Note Task To-Do.
3. Click the *Detail* link in the left navigation pane.



4. Enter a date in the *Completed* field.



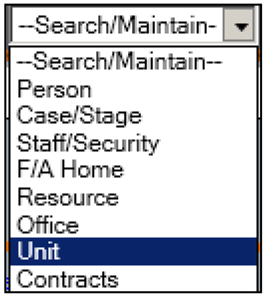
5. Click the **Save & Close** button.

Reassigning Unit Approver Status

This step requires the Maintain Unit business function and is typically done by the Security Coordinator.

You must remove the Unit Approver designation from one worker before you can designate another worker in the unit as the Unit Approver.

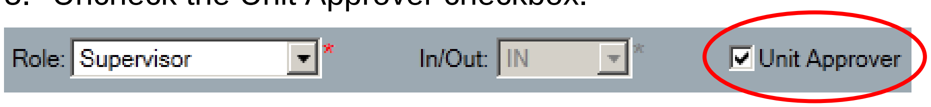
1. Select *Unit* on the Search/Maintain drop-down menu.



2. On the Unit Search window, click the **Search** button to display all units for your agency. You can narrow the search criteria by entering a Site, Zone (usually used in NYC) and/or Unit name before clicking the Search button.
3. In the Unit List grid, highlight the correct 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.*

4. Select the current Unit Approver (indicated by the "Y" in the UA column).
5. Uncheck the Unit Approver checkbox.

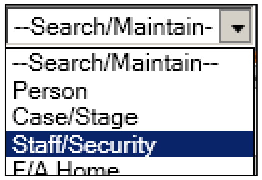


6. Click the **Modify** button.
7. Select the name of the worker who will be the new Unit Approver from the Member Information grid.
8. Check the Unit Approver checkbox.
9. Click the **Modify** button.
10. Click the **Save & Close** button.

End-dating a Person in CONNECTIONS

This step requires the Maintain Staff business function and is typically done by the Security Coordinator.

1. Select *Staff/Security* on the Search/Maintain drop-down menu.
2. In the Staff Search Criteria window, enter the name or Person ID of the worker to be end dated.



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.*

3. Click the **Search** button.
4. From the Staff List, select the worker to be end-dated.
5. On the **Detail** tab, enter the date in the End Date field.
6. Click on the **Save & Close** or **Save** button.

Disable or Delete the HSEN Account in Webstar

Delete or Disable?

- A user account should be disabled if a worker is going on medical or other extended leave for more than 3 weeks.

  An account may also be disabled to immediately remove access to CONNECTIONS while retaining the ability to reassign cases and preserve the worker's email account.

  When the user account is disabled, the worker will be unable to access NYSeMail or other applications that rely on HSEN authentication. For medical or other leaves, the user account will need to be enabled when the worker resumes work.

Reminder: HSEN user accounts are automatically deleted from the HSEN Active Directory if the user's password has been expired for more than 30 days. Disabling a user account prevents the account from being automatically deleted.

- A user account should be deleted if a worker is leaving the employment of the agency.

  When an account is deleted, the NYSeMail mailbox (if any) and home directory associated with the user account are also deleted. The mailbox will be deleted immediately, but can be restored within 30 days of the deletion. The home directory associated with the user account is deleted after 30 days, giving the LAN Administrator an opportunity to copy any documents and files from the home directory into another secure folder.

Accessing Webstar:

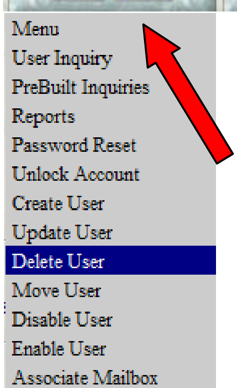
The following steps require an Administrative (ADM) account and are done by a Local Security Administrator (LSA).

You must be logged in to the state network to access the Webstar application.

- If you are using a LAN connected state computer, open your internet browser and go to: https://webstar.oft.state.nyenet/nyseWebstar
- If you are using an agency computer, *you must have SSL-VPN permission* in order to access the state network. Open your internet browser and go to https://rc1.cio.ny.gov/hsen. Log in with your regular User ID and password. On the bookmark page, select the Webstar link.

On the Webstar Main Menu page, scroll down and log in to the Active Directory Administration section using your user ID and your Administrative (ADM) password.

Deleting a User Account in Webstar



To delete a HSEN account for a user:

1. Hover over the User Menu**,** at the top of the page.
2. Select “Delete User” from the drop down menu.
3. Fill in the user’s ID number or select their name from the list of active accounts.
4. Review the information to be sure you are deleting the correct account.
5. Click the **Delete** button.

Disabling a User Account in Webstar:

To disable a HSEN account for a user:

1. Hover over the User Menu, at the top of the page.
2. Select “Disable User”.
3. Fill in the user’s ID number or select their name from the list of active accounts.
4. Review the information to be sure you are disabling the correct account.
5. Click the **Disable** button.

Additional Considerations

Workers may be assigned other CONNECTIONS-related responsibilities that must be reassigned before they are end-dated. These include roles such as:

- Security Coordinator
- Back-Up Security Coordinator
- Implementation Coordinator
- Back-Up Implementation Coordinator
- Data Warehouse Coordinator
- DAP Security Person

For Security Coordinators and their Back-Ups, the following business functions must be assigned to a new Security Coordinator or Back-Up ***before*** the account for the current worker is end-dated:

- Maint Security
- Maintain Office
- Maintain Unit
- Maintain Staff

- Maint Agy Acc (Maintain Agency Access)*
- Maint Org Hier (Maintain Organizational Hierarchy)*

* These last two business functions (Maint Agy Acc and Maint Org Hier) can only be assigned or unassigned by OCFS. A request to reassign these functions must be sent on the proper form to the OCFS CONNECTIONS Communication Unit at CONNECTIONSCommunications@dfa.state.ny.us by the district/agency's Implementation Coordinator.

This form, as well as one to record changes in Security Coordinators, Implementation Coordinators and their Back-Ups is available on the Security page of the CONNECTIONS internet at: http://www.ocfs.state.ny.us/connect/security

Reminder: When these roles change, information must also be updated in the District-Agency Profile (DAP).

If you need assistance updating the DAP, please contact your CONNECTIONS Regional Implementation Field staff.

Other Reminders

- If others gain access in CONNECTIONS by being a Designee of a worker, that access will be lost when the person is end-dated.

HINT: Running the *Assignee Designee Report*, available through the Data Warehouse (Cognos > Public Folders > Global Reports > OCFS > OCFS Data Warehouse > Security>Assignee Designee Report) can alert you to potential lost access before the worker is end-dated.

- REMINDER: if you have removed, *even temporarily*, the only Voluntary Agency worker in an FSS stage whose agency has Health responsibility, that responsibility must be reassigned to the agency once a new worker is assigned.

***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

NYS OFT Customer Care Center #
1-800-697-1323

CONNECTIONS Application questions:
ocfs.sm.conn_app@ocfs.state.ny.us *(NOTE: address contains an underline)*

CONNECTIONS Communications
CONNECTIONSCommunications@dfa.state.ny.us

Webstar assistance:
oft.sm.cns.webstar@nysemail.state.ny.us