



In line with the principle of least access, staff should have access to individual identifiable information only if their specific job responsibilities cannot be accomplished without such access. Not all workers will need to be assigned a workload in CONNECTIONS. Some workers, such as clerical or medical staff, may only need to access a portion of the record. For these workers, specialty paths offer a way to grant targeted access.

What Specialty Paths are Available?

- **Maintain Health**

The MAINT HEALTH business function is typically assigned to medical staff responsible for entering medical information on children in care. It, in combination with either the Case or Person Search business function, grants the worker access only to the Health Services tab in the Family Services Stage.



NOTE: *Due to the confidential nature of health information, workers outside the Case Manager's agency may modify health information only for those children for whom their agency has been designated as responsible.*

- Health responsibility is designated by either the Case Manager or Case Planner in the Health Services tab. See the CONNECTIONS Tip Sheet "*Designating Health Responsibility*" for specific instructions.
- Health responsibility is designated per child.
- Only one agency may be designated at a time for each child, so coordination between agencies will be needed when a child's placement transfers.

- **Maintain Education**

The MAINT EDUCATION business function is typically assigned to staff that are responsible for entering Educational information for children in care. It, in combination with either the Case or Person Search business function, grants the worker access only to the Education tab in the Family Services Stage.

- **Access Service Plan Review**

The ACC SERPLAN REV business function is typically assigned to Service Plan Review staff or those who regularly act as Third Party Reviewers. It, in combination with either the Case or Person Search business function, grants the worker access only to the Service Plan Review tab in the Family Services Stage.

- **Enter Progress Notes**

The ENTER PROG NOTE business function is typically assigned to clerical or other staff that enter progress notes on behalf of someone else. It, in combination with either the Case or Person Search business function, grants the worker access to only the progress notes tab of a CPS Investigation, FAR or Family Services Stage.

CONNECTIONS recognizes workers by their log on ID, and therefore will auto-fill the *Entered By* field in progress notes with the name of the person who is logged on. The name of the note's actual author can be selected in the *Author* field from a pull-down list of staff assigned a role in the stage. The value of "Other" is also available for notes authored by someone without a role in the stage. While in Draft status, progress notes can be edited by either the author of the note or by the person that entered the note.



IMPORTANT: The Enter Progress Notes business function should only be assigned to those entering notes on a stage *in which they do not have an assigned role.*

Workers do not need this business function to record progress notes in stages on their own workload.



NOTE: To locate and record information in cases that have been marked as sensitive, the View Sensitive business function is also required.

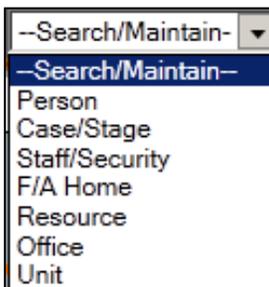
Entering information using the Specialty Paths

Navigation for all specialty paths begins at the Search/Maintain drop-down menu.

The most direct search path is a Case/Stage Search using the Stage Number.



HINT: The **Tracked Child Roster** report, available in both LDSS and VA versions through the Data Warehouse lists Stage IDs for each tracked child.



The Person Search path may also be used, but may require some exploration to be sure you are selecting the correct person from several with similar names.

To enter information via the Case/Stage path:

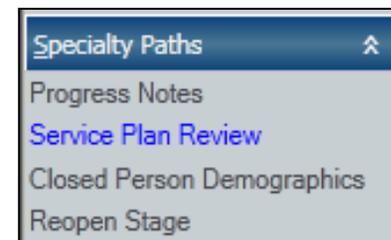
1. Select Case/Stage from the Search/Maintain drop-down menu.
2. In the Case Search window, enter the case number or stage number.
3. Click the Search button.

A Stage search will return only one result. Highlight the result and click the appropriate link in the left navigation pane to open the corresponding tab for that stage.

4. If you searched by case number, click on the Case Summary tab to locate the correct open stage.
5. Highlight the open stage.
6. In the left navigation pane, click on the enabled link for the path you are following (Maintain Health, Maintain Education, Enter SPR or Progress Notes) to open the specific tab and record your information.

To enter information via the Person path:

1. Select Person from the Search /Maintain drop-down menu.
2. In the Person Search window, enter the first and last names and the county. You can further refine your search by entering a date of birth, if known.
3. Select the correct result from those returned by clicking on the name to highlight it.
4. Select the Case List tab from the resulting tabs.
5. Highlight the open case (“OPN” in the status column).
Note: If there is more than one open case listed, you may have to repeat steps 6 and 7 to locate the correct stage.
6. Select the Case Summary tab from the resulting tabs.
7. Select the open stage.
8. In the left navigation pane, click on the enabled link for the path you are following (Maintain Health, Maintain Education, Enter SPR or Progress Notes) to open the specific tab and record your information.



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

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Help Desk #
1.800.697-1323