System Build 15.2
Job Aid

Changes to
FAD, CPS and Security

CONNECTIONS Training Project
SUNY Training Strategies Group

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CONNECTIONS - System Build 15.2 Job Aid
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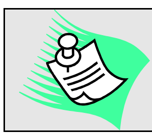

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Introduction

This Job Aid provides information about the changes to FAD, CPS and Security functions in CONNECTIONS that are being introduced with Build 15.2.

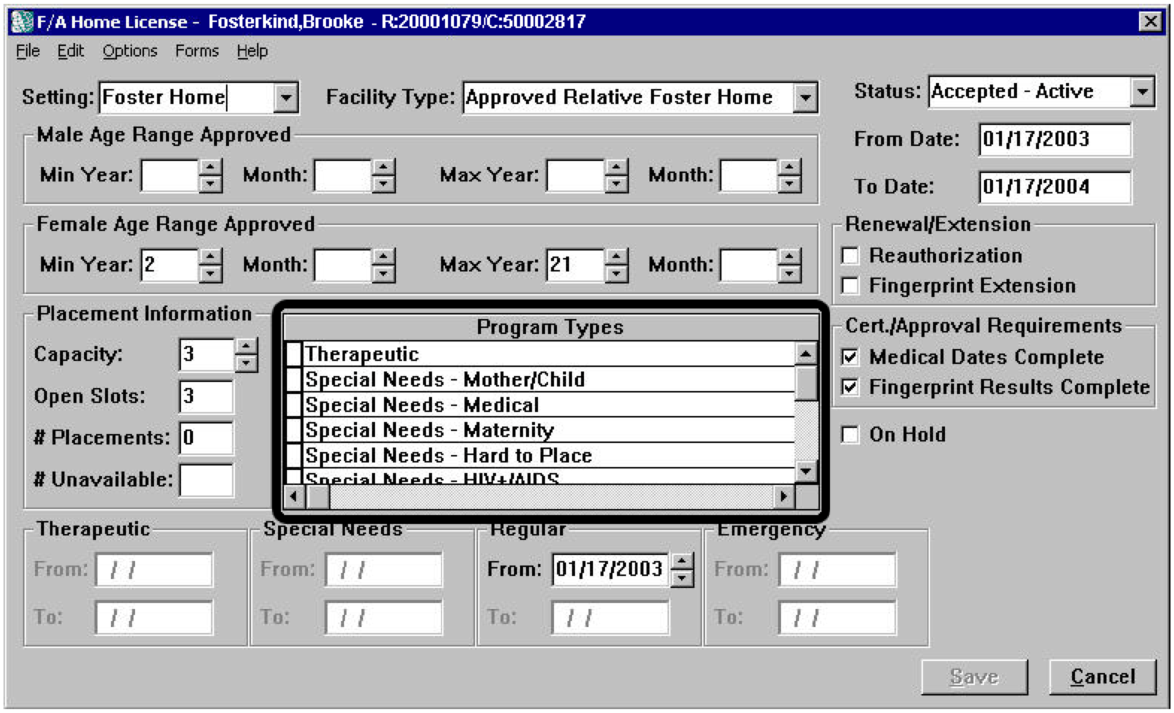
Specifically, this Job Aid contains information about the following:

- Reclassification of CONNECTIONS Foster Home Program Types into BICS-defined categories
- New fields on the *F/A Home License* window for program authorization dates
- New functionality enabling state rate-setting staff to record Maximum State Aid Rate (MSAR) information in CONNECTIONS
- System capability for recording Welfare Management System (WMS) case identification numbers in the *CPS Investigation Conclusion* window
- An increase in the default unit size for Security Coordinators
- A new system-generated Alert To-Do for supervisors that is generated when a worker is not end-dated in CONNECTIONS prior to deleting the worker through WEBSTAR
- A new requirement for supervisors to make a worker case-assignable before the worker can be assigned to cases/stages in CONNECTIONS

FAD Enhancements

Reclassified Foster Home Program Types

The Benefits Issuance Control System (BICS) pays foster homes for the services they provide to children placed in their care. BICS is being enhanced to pay Voluntary Agencies based on an established rate. The amount of these payments for Voluntary Agency-certified or approved foster homes is based on a number of factors, including the Program Type recorded on the *F/A Home License* window in CONNECTIONS. The Program Type reflects the degree of care and supervision in the foster home. For this reason, it is imperative that a foster home's Program Type accurately reflects the home's actual classification.



Prior to Build 15.2, CONNECTIONS foster home program types were not fully compatible with BICS-defined program types. The CONNECTIONS program types did not specify all of the program types that were associated with the Special Needs or Congregate Care program type groups defined by BICS. (See the table at the top of the next page.)

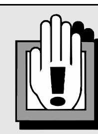
System edits were placed on the *F/A Home License* window in a previous Build to require that the Program Type(s) selected on this window are compatible with the selected Facility Type. If an incompatible Program Type is selected, the following message displays:

"The Program Type selected is invalid for the setting."

BICS Program Type Group	Existing CONNECTIONS Program Types
Therapeutic	Therapeutic
Special Needs	Hard to Place HIV + / AIDS Maternity Mother/Child Special Needs Behavioral Special Needs Medical
Regular	Regular
Emergency	Emergency
Congregate Care	Diagnostic Reception Center Refugee Assistance Program Sex Offenders Supervised Independent Living Program

As part of the ongoing effort to make CONNECTIONS information compatible with BICS data in the overnight batch update, Build 15.2 modifies the **Program Type** field on the *F/A Home License* window to clarify CONNECTIONS program types and relate them to their corresponding BICS program types. This reclassification groups Special Needs and Congregate Care program types to make them easier to identify. The **Program Type** field will now contain the following choices in reverse alphabetical order:

- Therapeutic
- Special Needs – Mother/Child
- Special Needs – Medical
- Special Needs – Maternity
- Special Needs – Hard to Place
- Special Needs – HIV +/ AIDS
- Special Needs – Behavioral
- Regular
- Emergency
- Cong. Care/FA – Refugee Assistance Program
- Cong. Care Only – Supervised Independent Living Program
- Cong. Care Only – Sexual Offenders
- Cong. Care Only – Diagnostic Reception Center



Keep in mind that the "Emergency" **Program Type** denotes a particular type of foster home that is certified to accept emergency placements on an ongoing basis.

This is not to be confused with a foster home that is in "Emergency" **Status**.

For example, if a worker previously would have selected "HIV +/AIDS" in the **Program Type** field in CONNECTIONS, that worker would now select "Special Needs – HIV +/AIDS."

With the implementation of Build 15.2, workers responsible for maintaining foster homes in CONNECTIONS will use these reclassified program types. This information needs to be recorded in the **Program Type** field on the *F/A Home License* window. As part of the implementation of Build 15.2, a data fix will update all foster homes in CONNECTIONS, *except those that were closed more than two years prior to the implementation date*.

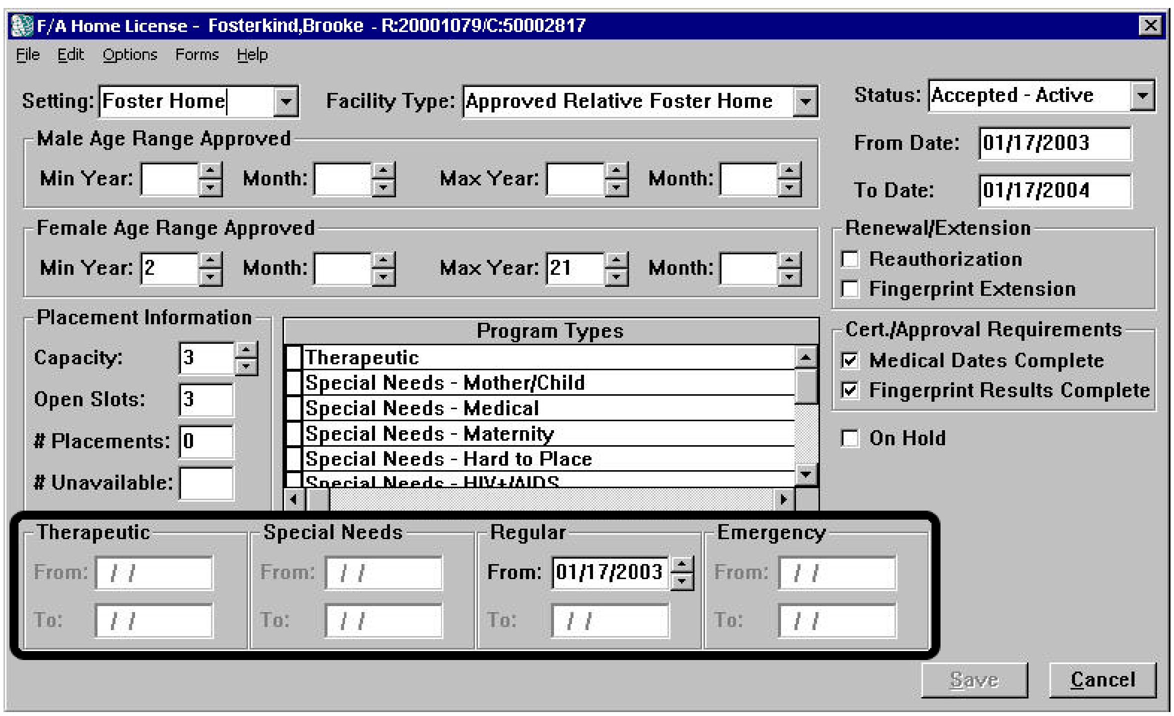
The "MAINTAIN FAD" Business Function must be included in a worker's Business Function Profile (BFP) in order for the worker to record information on the *F/A Home License* window. In addition, the worker must be the Primary or Secondary worker assigned to the FAD stage, or be a member of the Primary or Secondary worker's unit hierarchy.

At least one Program Type must be selected for a foster home; multiple Program Types may also be selected. If a worker attempts to save the *F/A Home License* window without recording a Program Type, the following message displays:

"You must have at least one program type checked in order to save."

Program Authorization Dates

In addition to the reclassified program types described in the previous section, Build 15.2 adds four pairs of **From** and **To** date fields to the *F/A Home License* window. Each pair of date fields corresponds to one of the BICS non-Congregate Care program type groups (Therapeutic, Special Needs, Regular and Emergency). These date fields will be required for any FAD home with a **Setting** of "Foster Home" and a **Program Type** selected from one of these four groups.



These **From** and **To** dates are *not* the same as the certification/approval (or recertification/reapproval) **From Date** and **To Date** fields in the upper right corner of the *F/A Home License* window. While the certification/approval **From Date** and **To Date** fields reflect the current certification/approval period for the foster home (and are system-generated when the certification/approval or recertification/reapproval is approved by the supervisor), the Program Type group **From** date fields at the bottom of the window reflect the dates when the foster home was authorized to begin operations in accordance with the corresponding Program

Type. With the exception of the one-time data fix at implementation, the **From** type for the applicable Program Type group must be recorded by the worker.

For example, a foster home began operations as a Therapeutic foster home (and progressed to Accepted-Active status for the first time) on April 30, 2001; at that time, the home's *certification* **From Date** and **To Date** would be 4/30/2001 – 4/30/2002. The home was recertified in April 2002, changing the *certification* **From Date** and **To Date** to 4/30/2002 – 4/30/2003. The Therapeutic (*Program Type*) **From** field still reads 4/30/2001, because that was the date on which the home first began operations as a Therapeutic foster home. Since the Therapeutic Program Type has never been deselected, the Therapeutic (*Program Type*) **To** field remains blank. Recertification/reapproval of a foster home does not change the *Program Type* **From** or **To** date fields.

For many foster homes in CONNECTIONS, the **From** date for a selected Program Type group will be the same as the date the home was certified or approved to provide care. There are, however, situations in which a foster home's program type(s) may change. For example, a home may originally have been certified as a Regular foster home on 5/15/2002, but the foster parents subsequently met the regulatory requirements (including specialized training) and receive certification to provide Therapeutic foster care services on 10/23/2002. This particular change would result in a change in the amount of payment the foster parents would receive from BICS for affected children who are placed in the home. This change would be reflected not only in the **Program Type** field, but also in the corresponding Program Type **From** and **To** date fields, as applicable. Build 15.2 provides the ability to capture, associate and maintain effective dates for the Therapeutic, Special Needs, Regular and Emergency program type groups.

As part of the implementation of Build 15.2, a data fix will convert each foster home's existing program types into the reclassified program types, based on the Program Type(s) recorded for the foster home in CONNECTIONS as of the implementation date. In addition, the data fix will convert program type **From** and **To** dates based on the home's status:

- ***Open Homes:*** The data fix will convert program type **From** dates for all homes in Accepted-Active, Accepted-Inactive, Pending-Acceptance, Pending-Emergency and Emergency status in CONNECTIONS. The data fix will populate the **From** field with the date the home progressed to the status in effect for the home at the time of implementation.

- ***Closed Homes:*** The data fix will convert program type **From** dates for all homes that are closed within the last two years from the build implementation date. If the home was closed more than two years from the build implementation date, no conversion will occur. The data fix will populate the **From** field with the date the home progressed to Accepted-Active or Emergency status for the first time.

The data fix will *not* populate any of the Program Type group **To** date fields.

A BICS program type group is considered *selected* when *at least one* of its associated CONNECTIONS program types is selected; it is considered *deselected* if *none* of its associated program types is currently selected.

When one of these choices is selected in the **Program Type** field, the corresponding **From** date field highlights in yellow, indicating that it is a required field.

If a worker attempts to save the *F/A Home License* window after selecting an item in the **Program Type** field without recording a corresponding **From** date, the following message displays:

"Program Type From Date required for selected program type(s)."

Valid program type dates are defined as follows:

- Both the **From** date and, if applicable, the **To** date must be within the past two years.
- Both the **From** date and, if applicable, the **To** date must not be more than six months in the future.
- The value in the **To** date can never be less than the value in the **From** date.

If the worker records an invalid date in one of the date fields, one of the following messages displays, as applicable:

"Program Type Dates must be within the past 2 years."

"Program Type Dates must not exceed 6 months in the future."

"Program Type To Date cannot be less than From Date."

For both open and closed homes, the **From** date for each applicable program type group will be the date the home progressed to Accepted-Active or Emergency status for the first time. With the exception of the one-time data fix at implementation, *this field will not populate automatically;* the worker must record the appropriate date in this field on the *F/A Home Licensing* window. The **From** field must contain the date the foster home is authorized to begin operations. This date cannot be greater than the **To** date. The **To** date will always be blank until a particular home's program ends. (The worker must *deselect* the applicable Program Type and then enter the appropriate date in the **To** field for that Program Type group. The **To** date is *never* system-generated.)

When a worker opens the *F/A Home License* window, if the **Program Type** field is blank, the corresponding **From** and **To** date fields will enable when an applicable program type is selected. If a valid date is already present when the worker opens the *F/A Home License* window, the date is modifiable regardless of which program type is selected (or if no program type is selected).

Once a home has been progressed to Accepted-Active status, if a worker deselects a previously selected item in the **Program Type** field to another non-Congregate Care program type group, the **To** date must be completed for the deselected program type group.

If a worker records a program type **From** date and saves the *F/A Home License* window, but then needs to remove the entry, the worker must deselect the recorded program type, record the same value from the **From** field into the **To** date field and save the change. Each deselected program type group's **From** and **To** field should contain valid data.

If a worker attempts to save the *F/A Home License* window after deselecting an item in the **Program Type** field without recording a corresponding **To** date, the following message displays:

"Program Type To Date required for de-selected program type(s)."

The program type **From** and **To** date fields can be modified only after the home has progressed to Accepted-Active status at least once.

CONNECTIONS will retain and display all saved Program Type **From** and **To** dates, regardless of the Program Type that is currently selected for the foster home.

Step-by-Step:
Recording Program Types
and Corresponding Program Dates
on the *F/A Home License* Window

1. From the *Task List* for a selected foster home, select the **Maintain Licensing Information** task and click on the **Detail…** button.
   The F/A Home License window displays.
2. In the **Program Type** field, double-click to select a program type.
   *A system edit requires you to select at least one program type; multiple program types may be selected. The program type(s) you select must be appropriate for the **Setting** and **Facility Type** recorded on the window.*
3. If a Therapeutic, Special Needs, Regular or Emergency program type is selected, the corresponding **From** date field highlights in yellow, indicating that it is a required field.
4. Enter a valid date in the applicable **From** date field.
5. *If the foster home is in any status **other** than Accepted-Active or Emergency*, click on the **Save** button to save the changes to the window.

   —OR—

   If the home is in Accepted-Active or Emergency status, click on the **Save and Submit** button to save the changes and submit them for supervisory approval.

Note for Supervisors:

The Program Type **From** and **To** date fields cannot be viewed from the FRS or via a Resource search. To view these fields, open the *F/A Home License* window from the *Event List* or the *Task List* (both lists can be accessed from caseworker's *Assigned Workload*). The instructions below open the *F/A Home License* window from the *Assigned Workload:*

1. Open the caseworker's *Assigned Workload* (via the *Unit Summary* window), select the applicable FAD stage and open the *Task List*.
2. Select the **Maintain Licensing Information** task and click on the **Detail…** button.
   If the F/A Home Licensing window is pending approval, the following message displays: "Saving will invalidate the pending approval. Continue in modify mode?"
3. Click on the **No** button, since you only want to *view* (not modify) the information.
   The F/A Home License window displays in view-only mode.

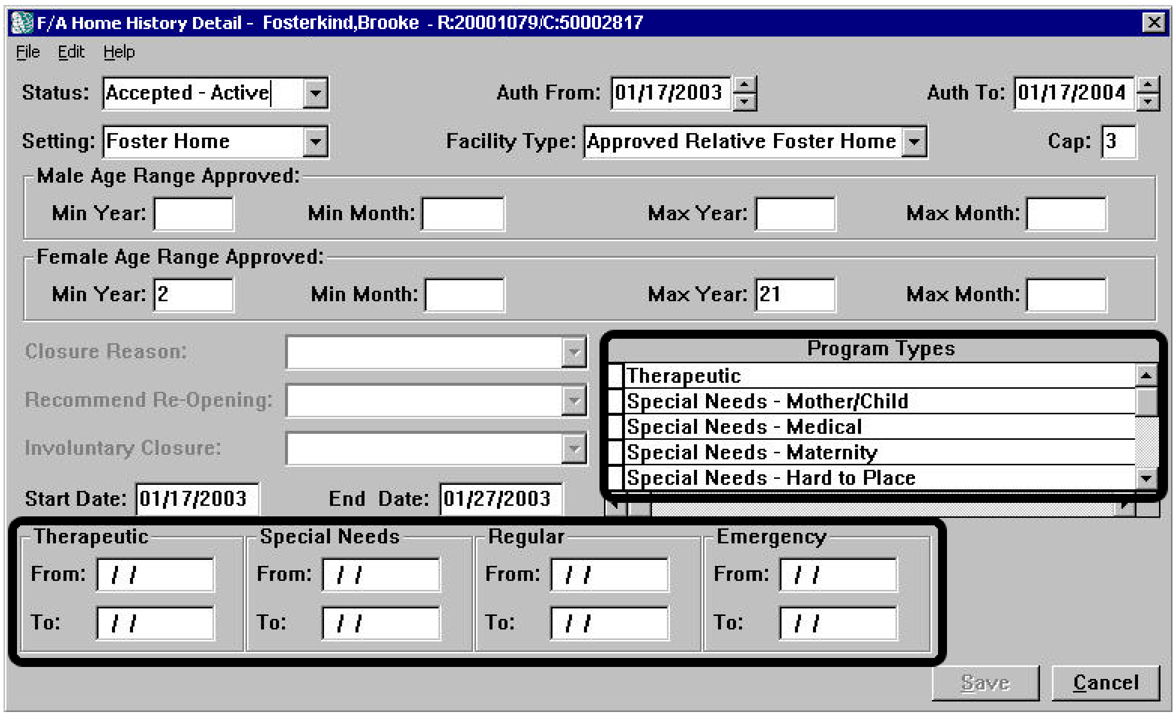
Effect of Program Type Changes on F/A Home History

Every time the *F/A Home License* window (including the **Program Type** field and any applicable **From** and **To** date fields) is modified and saved, an event is generated on both the *Event List* and the *F/A Home History* window. This occurs regardless of the status of the foster home.

The historical record of these Program Type changes, as well as their corresponding From and/or To dates, can be viewed on the *Event List* or the *F/A Home History* window for a FAD home. The *Event List* provides view-only access to this information (on the *F/A Home License* window for an historical event), while workers with the “MAINT FAD HIST” Business Function in their BFPs can modify this information on the *F/A Home History Detail* window. If a worker’s BFP does not contain that Business Function, the *F/A Home History Detail* window can only be opened in view-only mode.

When changes are made to the **Auth. From** date on the *F/A Home History Detail* window, the **Auth. To** date automatically recalculates by the number of days that the **Auth. From** date was modified, but the **Auth. To** date will not advance beyond the **Auth. To** date that existed before the **Auth. From** date was changed. This applies only to the first record listed on the *F/A Home History* window.

Like the *F/A Home License* window, the *F/A Home History Detail* window will also contain the reclassified **Program Types** and corresponding **From** and **To** date fields. Historical **From** and **To** dates will display in this window.



When the *F/A Home History Detail* window is opened in modify mode, only the **Status**, **Auth. From** and **Auth. To** fields can be modified. All other fields are protected. The only exception to this occurs when the first record is selected from the *F/A Home History* window; then only the **Auth. From** date field can be modified. When the **Auth. From** date is advanced, the new **Auth. To** date cannot exceed the **Auth. To** date that was first displayed on the *F/A Home History Detail* window. This ensures that the certification period is valid.

Step-by-Step:
Viewing Program Type/Date Changes on the *Event List*

1 After selecting a FAD stage from the *Assigned Workload*, click on the **Options** menu and select the **Event List…** command.
The Event List displays for the selected stage.

Step-by-Step:
Viewing Program Type/Date Changes on the *F/A Home History Detail* Window

1. From the *Task List* for a selected foster home, select the **View Home History** task and click on the **List…** button.
   The Home History List displays.

2. Click on a home history event to select it from the list, then click on the **History Detail…** button.
   The F/A Home History Detail window displays for the selected historical event.
   *If you select the first (most recent) event on the list, the follow message displays when you click on the **History Detail…** button:*
   "The most current row was selected. Only the Auth. From date may be modified."
   If you select any other event on the list, the F/A Home History Detail window displays in view-only mode.

Resource Directory Enhancements (OCFS Staff Only)

Payment Indicators

Build 15.2 adds a new Payment Indicators section to the *Facility Detail* window. This section contains three fields:

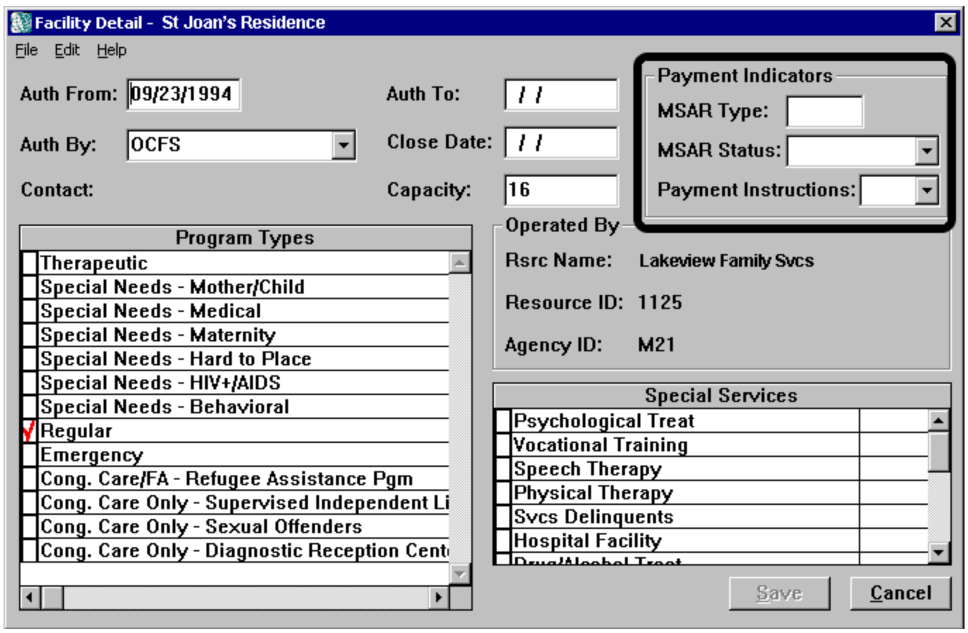
- **MSAR Type**
- **MSAR Status**

Recorded on the *Facility Detail* window for a Congregate Care facility

- **Payment Instructions**

Recorded on the *Facility Detail* window for a Voluntary Agency

The **MSAR Type** and **MSAR Status** fields apply *only* to Congregate Care facilities (FAD stages with a **Setting** of “Congregate”). The **Payment Instructions** field applies *only* to Voluntary Agencies. ***Only OCFS staff can maintain this information in CONNECTIONS.***



Maximum State Aid Rate (MSAR) Type and Status

The Maximum State Aid Rate (MSAR) represents the maximum amount of reimbursement the state will pay for a Congregate Care facility. In order to enable CONNECTIONS data to update BICS during the nightly batch run, Build 15.2 modifications to the *Facility Detail* window will enable OCFS staff to record and maintain information needed by BICS to ensure proper payment to facilities. This information is recorded in the **MSAR Type** and **MSAR Status** fields. The completion of these fields will ensure that payments are made appropriately in BICS for the services provided.

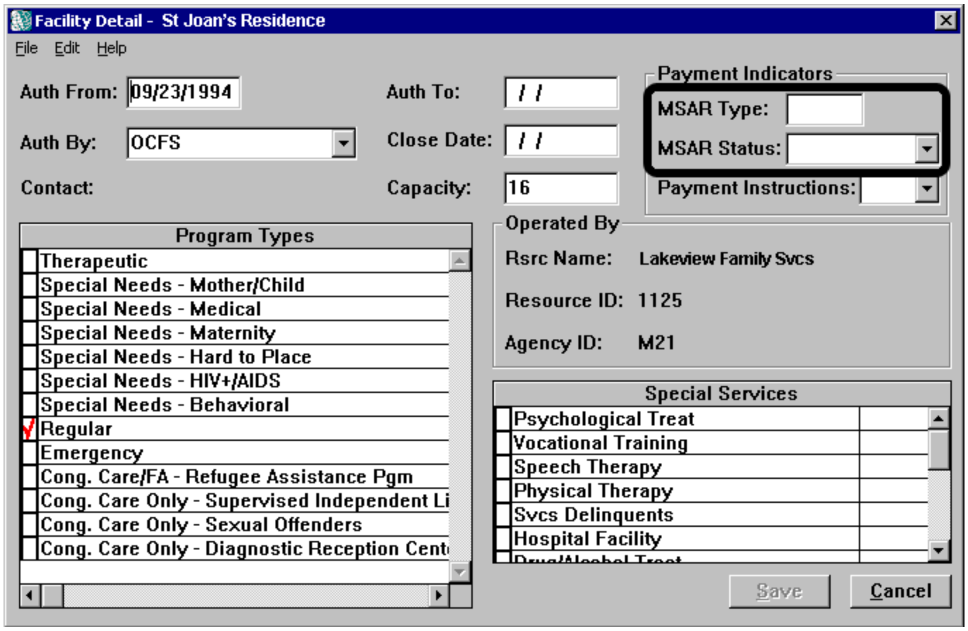
In order to maintain MSAR information on the *Facility Detail* window, a worker’s BFP must include the new “MAINT PAY IND” Business Function.

The **MSAR Type** field contains a three-character alphanumeric code that is used by OCFS rate-setting staff to identify each rate-setting program. By default, this field is blank.

The **MSAR Status** field identifies special processing in BICS related to the agency's MSAR. This field contains a drop-down list containing the following values:

- **O** (Out of State)
- **N** (New)
- **E** (Established)

By default, the **MSAR Status** field is blank.



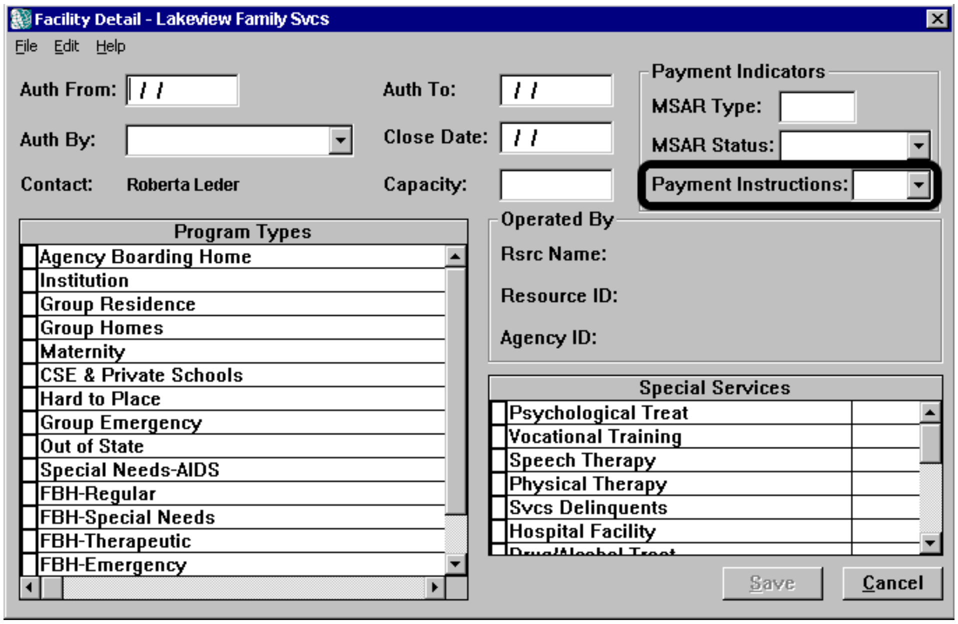
Payment Instructions

For Voluntary Agency-authorized foster homes, the pass-through payment and administrative rate are typically paid directly to the authorizing agency. Under certain specific circumstances, BICS can be instructed to make payments directly to a voluntary agency's foster home. OCFS staff use the **Payment Instructions** field to identify these *unique* payment instructions for voluntary agencies. This field contains a drop-down list containing the following values:

- **1** — Pay the pass-through directly to the foster home
  The pass-through payment is sent directly to the foster home; no administrative rate is paid to the Voluntary Agency.
- **2** — Pay only the administrative rate to the Voluntary Agency
  The administrative rate is paid to the Voluntary Agency; no pass-through payment is sent to the foster home.
- **3** — Pay the pass-through directly to the foster home and the administrative rate to the voluntary agency

By default, the **Payment Instructions** field is blank.

Build 15.2 will also organize the Program Types on the *Facility Detail* window in the same manner as on the *F/A Home Licensing* and *F/A Home History Detail* windows to make locating program types more consistent for users.



CPS Enhancements

WMS Case Number Recording

In preparation for linking an open CPS case with its corresponding Family Services case in a future build, Build 15.2 enables caseworkers to record the Welfare Management System (WMS) case number in CONNECTIONS. This enhancement was also requested by users to link active WMS service cases to CPS Investigations.

In order to *maintain* this information in CONNECTIONS, all of the following must apply:

- The worker must be the Primary worker assigned to the investigation stage or a member of the Primary worker's unit hierarchy.
- The worker's BFP must contain the "VIEW UNDER INV" Business Function.

The ability of Secondary workers to view or maintain the WMS case number information in CONNECTIONS is determined as follows:

- *If the Secondary worker is a member of the Primary worker's unit hierarchy*, the Secondary worker will be able to *add* and/or *modify* the **WMS Case Number** field; the **Validate** button will be enabled in order for the worker to validate the WMS case number.
- *If the Secondary worker is in the same district as the Primary worker, but not in the Primary worker's unit hierarchy*, the Secondary worker will be able to *view* the **WMS Case Number** recorded by the Primary worker, but the field will be protected and the **Validate** button will be disabled.
- If the Secondary worker is in *a different district* from the Primary worker, the WMS fields will display on the *CPS Investigation Conclusion* window, but the fields will be blank and protected. The **Validate** button will be disabled.

Workers who have the ability to maintain the **WMS Case Number** field will be able to record the WMS case number on the *CPS Investigation Conclusion* window in CONNECTIONS once they select one of the following choices in the **Closure Reason** field (regardless of whether the investigation is Indicated or Unfounded):

- Open – Court ordered services
- Open – Court ordered supervision
- Open – Voluntary services
- Open – Voluntary placement
- Open – Court ordered placement

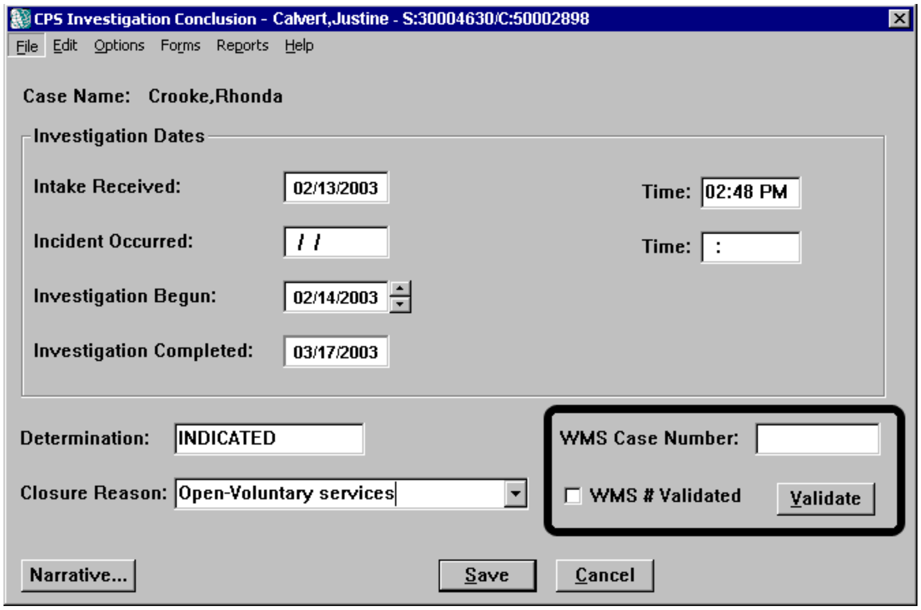
New York City ACS staff are required to record and validate the WMS Case Number for all applicable investigations.

Build 15.2 will also change the ACS Child Protective Record Template (CPRT) to include additional questions/items related to the processing of Domestic Violence cases.

Case Managers and Super Users also can add/modify and validate the WMS case number.

Office of Confidential Investigations (OCI) and Regional Office staff can view the WMS case number.

New York City caseworkers are *required* to record the WMS case number for any CPS investigation in which a WMS case also exists. For example, if a family is receiving preventive services and a member of the household is later named in a report, the WMS case number needs to be recorded on the *CPS Investigation Conclusion* window. ACS caseworkers must record this information in CONNECTIONS as soon as possible, which may occur before the investigation is ready to be concluded. In this situation, the WMS case number is recorded on the *Person Identifiers* window (accessed from the **Options** menu on the *Person List*) until the information can be recorded on the *CPS Investigation Conclusion* window.



Build 15.2 adds three fields to the *CPS Investigation Conclusion* window for recording or modifying the WMS case information associated with each CPS case:

- The **WMS Case Number** field identifies the services case from the WMS legacy system. This field needs to be completed when one of the "Open for Services" closure reasons (listed on page 14) is selected. This information is mandatory for New York City ACS staff if a WMS case exists.

- The **Validate** button enables a worker to validate the information recorded in the **WMS Case Number** field. The validation process interfaces with the WMS legacy system to determine if a valid WMS case number for that district matches the number recorded in the **WMS Case Number** field. It does *not* validate the case composition of the CONNECTIONS case and the WMS case. All WMS case numbers recorded on the *CPS Investigation Conclusion* window need to be validated. (See the tip box at right.)

- The **WMS Validated** check box identifies the status of the WMS case number validation process. If a check

What if the WMS Case Number can't be validated?

If the WMS Case Number can't be validated, the following message displays:

"*Case Number does not exist in district. Do you wish to override?*"

Click on the **Yes** button to override the validation process.

The **WMS Validated** check box will be blank, but the *CPS Investigation Conclusion* window can still be Saved and Submitted for supervisory approval.

A future Build will include enhancements to Local Data Maintenance (LDM) that will enable appropriate workers to modify this information.

mark displays in the box, the WMS case number has been validated; if the check box is blank, the WMS case number has *not* been validated.

The WMS case number may be recorded and validated once an “open” Closure Reason has been selected. For ACS workers in New York City, a system edit will require the WMS case number to be recorded before the Investigation Conclusion is Saved and Submitted for supervisory approval. (See the tip box on page 14.)

Step-by-Step:
Recording and Validating WMS Case Numbers in CONNECTIONS

1 From the *Task List* for a CPS Investigation stage, select the **Investigation Conclusion** task and click on the **Detail…** button.
The CPS Investigation Conclusion window displays.

2 Click on the drop-down arrow for the **Closure Reason** field and select one of the “Open for Services” closure reasons *(see page 14).*

3 In the **WMS Case Number** field, enter the appropriate WMS case identification number.

4 Click on the **WMS Validate** button.
*The validation process compares the number you recorded with the information recorded in WMS. The **WMS Validated** check box displays a check mark when the validation process is completed. If the WMS Case Number can’t be validated, the following message displays:*
“Case Number does not exist in district. Do you wish to override?"
*Click on the **Yes** button to override the validation process.*

5 Click on the **Save** button to save your changes.
*If you have completed recording all necessary information on this window (including the Investigation Conclusion narrative) and you are ready to submit the investigation conclusion for supervisory approval, click on the **Save and Submit** button.*

If WMS cannot validate the case number recorded on the *CPS Investigation Conclusion* window, the worker can continue documenting the investigation conclusion and save the WMS case number without validation. CONNECTIONS will store the recorded WMS number and district code of the Primary worker associated with the CPS case. If a WMS case number has been stored with an Invalid indicator, CONNECTIONS will try to validate the number again when the worker Saves and Submits the investigation conclusion for supervisory approval.

Security Enhancements

Increase in Default Unit Size

When new workers are added to CONNECTIONS via WEBSTAR (see the tip box at right), they are automatically placed in a default unit. The default unit is a temporary holding place for new workers until the Security Coordinator In-Assigns them to the specific unit(s) in which they will work. The numbered designation of all default units starts with "N." Build 15.2 increases the maximum number of staff in these units from 3 to 50.

Changes Affecting Security

Build 15.2 also includes two security-related enhancements of importance to Security Coordinators and others authorized to use the Maintain Staff function:

- End-dating workers in CONNECTIONS and reassigning their cases and To-Do's to other workers
- Making workers case assignable

End-Dating Workers

If a worker is deleted through WEBSTAR before being end-dated in CONNECTIONS, an Alert To-Do will be generated to the *Staff To-Do List* for that worker's Unit Approver. This To-Do, which contains the worker's name, Person ID number and Unit ID number, will notify the Unit Approver that all cases and To-Do's currently assigned to that worker need to be transferred to a new worker (via the *Assign* window); and the previous worker needs to be end-dated (via the *Staff Detail* window) in CONNECTIONS. System-generated Task To-Do's must be reassigned; Alert and Reminder To-Do's may be deleted.

What is WEBSTAR?

An agency's local LAN (Local Area Network) Administrator is given the ability to access and use WEBSTAR (Web Enhanced Basic Security to Authorize Resources) by the NYS Office for Technology (OFT) The local LAN Administrator uses WEBSTAR to request NT logon IDs for workers in that agency and to reset NT logon passwords when necessary. The NT logon ID allows a worker to logon to the computer system.

While still in WEBSTAR, the local LAN Administrator can add the worker to CONNECTIONS using Administer Application Access (or the worker can be added to CONNECTIONS later).

A batch update run between WEBSTAR and CONNECTIONS occurs nightly; the worker will have been added to CONNECTIONS the next day.

There are currently many staff active in CONNECTIONS who have been deleted through WEBSTAR. These individuals should be end-dated in CONNECTIONS. One of the new Security Reports available through the OCFS Data Warehouse can be used to obtain a complete list of staff (for a district or agency) who need to be end-dated. A COGNOS password is required to access the reports in the Data Warehouse. (See "Generating a Data Warehouse Report of WEBSTAR-Deleted Staff Who Have Not Been End-Dated in CONNECTIONS" on page 20 for step-by-step instructions for running this report.)

Step-by-Step:
Reassigning a Worker's Stages to Another Worker

1 Click on the **UNIT** button on the CONNECTIONS Toolbar.
The Unit Summary window displays.

2 Click on the **Search** button to display all staff for your unit.

3 Click on a worker's name to select it from the list, then click on the **Workload…** button.
The selected worker's Assigned Workload displays.

4 Click on each case to select it.
Multiple cases can be selected. A maximum of 20 primary assignments (stages) can be made at a time; for secondary assignments, each stage must be reassigned individually. If more than the allowed number of assignments is selected, the ***Assign…*** *button disables.*

5 Click on the **Assign…** button.
The Assign window displays.

To reassign a Primary assignment:

6 Select a different worker from the Available Staff section on the *Assign* window, then click on the **Primary** button.
The following message displays:
"This action will remove the current Primary worker from the stage. Continue?"

7 Click on the **Yes** button.

8 Click on the **Save** button to complete the reassignment.
The previous worker's Assigned Workload displays; the Primary assignments no longer appear.

To reassign a Secondary assignment:

9 Select the appropriate worker from the Available Staff section on the *Assign* window, then click on the **Secondary** button.

10 In the Assignments section on the window, click on the name of the Secondary worker being removed from assignment, then click on the **Un-Assign** button in the lower left corner of the *Assign* window.

> **Be sure to assign a new Secondary worker before removing the Secondary assignment for the worker who will be end-dated.**

11 Click on the **Save** button to complete the reassignment.
The previous worker's empty Assigned Workload displays; the Secondary assignment no longer appears. Remember, each Secondary assignment must be reassigned individually.

Step-by-Step:
Reassigning a Worker's To-Do's to Another Worker

1 Click on the **UNIT** button on the CONNECTIONS Toolbar.
The Unit Summary window displays.

2 Click on the **Search** button to display all staff for your unit.

3 Click on a worker's name to select it from the list, then click on the **To-Do…** button.
The selected worker's Staff To-Do List displays. You may find it helpful to use the

Sort *menu and select the* ***To-Do Type*** *command; this will group all of the Task To-Do's at the top of the list.*

4 Click on a To-Do to select it.
Only one To-Do can be modified at a time. All system-generated Task To-Do's must be reassigned; Alert and Reminder To-Do's can be deleted.

5 Click on the **Detail…** button.
The To-Do Detail window displays.

6 Click on the **Staff…** button.
The Staff Search Criteria window displays.

7 Enter the name of the worker to whom the To-Do is to be transferred, then click on the **Search** button.
The Staff List displays with the results of the search.

8 Select the worker's name from the *Staff List* and click on the **OK** button.
The To-Do Detail window displays with the name of the newly assigned worker in the ***Assigned To*** *field.*

9 Click on the **Save** button.

Step-by-Step:
End-Dating a Worker in CONNECTIONS

1 Click on the **Maintain** menu on the CONNECTIONS Toolbar and select the **Staff…** command.
The Staff Search Criteria window displays.

2 On the *Staff Search Criteria* window, enter the name of the worker to be end-dated, then click on the **Search** button.
The Staff List displays with the results of the search.

3 Click on a worker's name to select it from the list, then click on the **Detail…** button.
The Staff Detail window displays for the selected staff person.

4 In the **End Date** field, enter the appropriate date.
This date cannot be a future date.

5 Click on the **Save** button.

	Step-by-Step: **Generating a Data Warehouse Report of WEBSTAR-Deleted Staff Who Have Not Been End-Dated in CONNECTIONS**

1 In Cognos Impromptu, open the Staff Security report.
The directory path is: OCFS DataWarehouse > DataWarehouse > Pre-defined User Reports > Security - Impromptu > Staff Security Report

2 Click on the **Query Data** button ().
The Query window displays.

3 Click on the **Filter** tab.

4 Click on the **And** button.

5 Double-click the yellow **Report Columns** icon on the left side of the window.

6 Click on **NT Login**.

7 Click on the *right* arrow (→) button.

8 Click on **is missing**.

9 Click on the *right* arrow (→) button.

10 Click on the **Data** tab.

11 In the Query Data section on the right side of the window, click on **Business Functions**.

12 Click on the *left* arrow (←) button.

13 Click on the **OK** button.
You can now print the report or save it in either PDF or Excel format. If you save it as an Excel file, you can modify the data (which you can't do with a PDF file).

There may be individuals on the list who have been end-dated but remain in the unit. If this is the case, follow these instructions to remove them from the unit:

	Step-by-Step: **Removing an End-Dated Worker from a Unit**

1 Click on the **Maintain** menu on the CONNECTIONS Toolbar and select the **Staff…** command.
The Staff Search Criteria window displays.

2 On the *Staff Search Criteria* window, select the **Inactive** check box, then enter the name of the worker to be end-dated and click on the **Search** button.
The Staff List displays with the results of the search.

3 Click on a worker's name to select it from the list, then click on the **Detail…** button.
The Staff Detail window displays for the selected staff person.

4 Click on either of the arrows for the **End-Date** field to change the date.
The date displays in red.

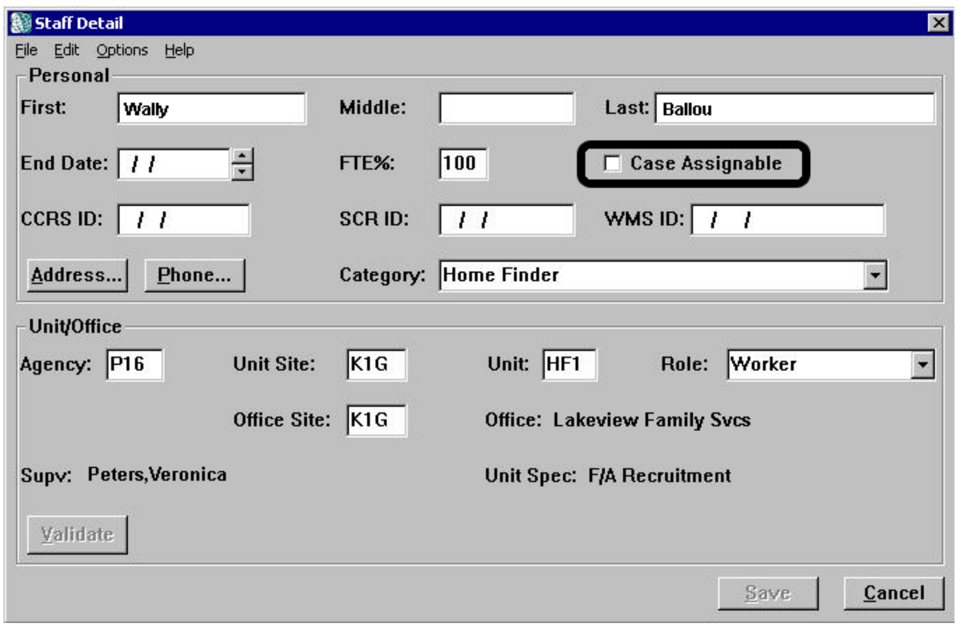
5 Click on the opposite arrow to return the **End-Date** field to its original date.
*The **Save** button enables.*

6 Click on the **Save** button.

Making Workers Case Assignable

New workers will no longer be automatically case-assignable. The worker's supervisor will need to select the **Case Assignable** check box on the *Staff Detail* window to enable the worker to receive case assignments. This change is already in effect in New York City; Build 15.2 makes it effective for all new staff statewide who are added to CONNECTIONS.

The "MAINTAIN STAFF" Business Function is required to make a worker case assignable.



	Step-by-Step: **Making a Worker Case Assignable**

1 Click on the **Maintain** menu on the CONNECTIONS Toolbar and select the **Staff…** command.
The Staff Search Criteria window displays.

2 On the *Staff Search Criteria* window, enter the name of the worker to be made case assignable, then click on the **Search** button.
The Staff List displays with the results of the search.

3 Click on a worker's name to select it from the list, then click on the **Detail…** button.
The Staff Detail window displays for the selected staff person.

4 Click on the **Case Assignable** check box.
A check mark displays in the check box.

5 Click on the **Save** button.

Updates to Online Help

Online Help will be updated to reflect enhancements made to the CONNECTIONS system in Build 15.2. These enhancements include modified windows and fields, as well as changes to casework recording guidelines for New York City ACS workers.