

CONNECTIONS

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BUSINESS FUNCTIONS FOR DISTRICT: *To be assigned at the discretion of the district*

To eliminate confusion, the definition of hierarchy is included in this Business Functions Guideline.

Role in Unit/Unit Hierarchy: Staff are categorized within a unit into a hierarchy of Workers, Supervisors, Maintainers, and Managers; each unit also contains one Unit Approver. Unit members other than the Unit Approver may need to access workloads of other unit members in order to assign stages or record case information such as fingerprint results. Having a role in the unit hierarchy as (or above that of) the unit approver, combined with certain Business Functions, will grant that access. For example, if a worker is the Unit Approver (in addition to having the Unit Summary Access Business Function), the worker will have access to the workloads of all workers of all workers in the unit and, therefore, can access all stages in the unit. This role will also allow workers to perform certain functions above and beyond the security rights provided by their own role in a stage or the assigned Business Functions (other than Unit Summary Access).

Business Function (BF)	Security Attributes	Description	Recommendations	Comments
ACCESS ALL DISTRICT	<ul style="list-style-type: none"> Case Search Access All in District 	<ul style="list-style-type: none"> Allows view access to all case details for all cases in the user's district/agency. Additional profiles are still needed to view details controlled by other profiles (i.e. View Under Investigation, View Indicated). Access is applied to both open and closed cases, including converted cases. This attribute also provides view access to Foster and Adoptive Home (FAD) records. 	<ul style="list-style-type: none"> It is recommended that a staff person who has responsibility for the entire district be given this Business Function. 	<ul style="list-style-type: none"> This was changed in name only in Build 15 from VIEW ALL/ DISTRICT The <i>district</i> of the case includes the district of the current case manager, district/agency of the primary worker on each stage and secondary worker(s) on each stage.
ACC SEALED ADOP	<ul style="list-style-type: none"> Access Sealed Adoption 	<ul style="list-style-type: none"> The assignment of the Business Function ACC SEALED ADOP will allow a user to access a Child Case Record that has been sealed due to the finalization of adoption. A Child Case Record (CCR) is created when the child is completely legally freed and the Case Manager checks the Completely Freed for Adoption (Create Child Case Record) checkbox on the Tracked Child Detail, Placement Information window The Adoption is sealed once the Finalize Adoption window is completed and saved; however, the CCR stage can then remain open or 	<ul style="list-style-type: none"> It is recommended that only staff who are Adoption supervisors or those with a specific need to see sealed Adoptions be given this Business Function. The Security Coordinator needs to give careful consideration when assigning this Business Function, as there are strict confidentiality laws and regulations regarding sealed adoptions. There should be a regular review of the staff who have this Business function to be 	<ul style="list-style-type: none"> If there is an Open or Closed CCR stage for which the Finalized Adoption window has not been completed (the worker does not yet have all of the information to complete the finalization, the child's goal changed or the adoption was never completed) and saved, then the stage is not sealed, so the Business Function ACCESS SEALED ADOPTION does not apply. These cases, where the stage is not sealed, are treated like all other foster care cases.

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		<p>be closed.</p> <p><u>CCR Stage Remains Open:</u> <u>The Adoption Finalization window has been completed and saved, and Stage is still Open</u></p> <ul style="list-style-type: none"> • The Case Manager (always a local district worker) assigned to the stage is: <ul style="list-style-type: none"> • the only person who does not need the Business Function to access the Finalize Adoption window, • the only one who can modify the window. • A worker with the Business Function and access to the stage: <ul style="list-style-type: none"> • can access the Finalize Adoption window • can only access the window in browse mode. • A worker who could otherwise access the stage, but who does not have the Business Function cannot access the Finalize Adoption window. <p><u>CCR Stage is Closed: The Adoption Finalization window has been completed and saved, and the CCR stage has been closed.</u></p> <ul style="list-style-type: none"> • To access a Sealed Adoption stage, users MUST have the Business Function ACC SEALED ADOP and access to the stage (through View All in District, Historical access or Agency Access). • Workers who were assigned to the stage at one time, and unassigned prior to stage closure, will be able to 	<p>sure that no one has it who does not need it.</p> <ul style="list-style-type: none"> • Please note that the process to finalize an adoption can be completed without the ACC SEALED ADOPTION Business Function by the Case Manager or anyone in the Case Manager's unit hierarchy. • It is STRONGLY recommended that the CCR stage be closed when the Finalize Adoption window is completed and saved. This will prevent access to the CCR after finalization. • In Build 19, when the adoption is finalized, the CCR will auto-close. 	

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		view the window if they have the Business Function ACC SEALED ADOP.		
ACC SERPLAN REV	<ul style="list-style-type: none"> Access Service Plan Review 	<ul style="list-style-type: none"> The assignment of the Business Function ACC SERPLAN REV will permit staff the ability to create and/or modify Service Plan Review information. ACC SERPLAN REV only allows a clerical or any other worker access to the Service Plan Review functionality. The worker with the Business Function, and no role in the case, gains access to the Service Plan Review from Case Search, but will not have access to other information within the Family Services Stage. 	<ul style="list-style-type: none"> It is recommended that this Business Function be assigned to clerical or other workers who are responsible for Service Plan Reviews. 	<ul style="list-style-type: none"> Please note that the following workers will have the ability to create and modify Service Plan Reviews without the Business Function ACC SERPLAN REV: <ul style="list-style-type: none"> Assigned workers having a role in the stage, Any worker who is in the assigned worker's unit hierarchy or Any worker who has access to the workload of a worker with a role in the case as a result of access granted through the Agency Access window.
APPROVE HP INV	<ul style="list-style-type: none"> Approve High Priority Investigation 	<ul style="list-style-type: none"> NYC Only. At Intake, a case can be identified as High Priority based on thirteen High Priority factors. Once a case is so identified, it requires a second level of approval by a NYC manager. The NYC manager must have the Approve HP INV Business Function and have access to the workload through a role in the stage (such as secondary). 		
CPS CASEWORKER	<ul style="list-style-type: none"> Access All in District Case Search Person Search View Admin Review View Call Log View Indicated View Reporter/Source View Under Investigation 	<ul style="list-style-type: none"> This Business Function is a grouping of Security Attributes recommended for assignment to a CPS Worker. 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Refer to Business Function that includes each Security Attribute for details about how each one works.

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CASE/PERS SRCH	<ul style="list-style-type: none"> View Unfounded Person Search Case Search 	<ul style="list-style-type: none"> Allows users to perform statewide person and case searches from the toolbar. (Statewide Inquiry) 	<ul style="list-style-type: none"> It is recommended that this Business Function be assigned to individuals who may need to perform searches outside of working in a case. Any worker in the process of opening a case, or adding a new person to an existing case, will have the capability to perform a person search without this Business Function. 	<ul style="list-style-type: none"> Any person or case search action will return 'basic information': <ul style="list-style-type: none"> Name Sex DOB Case Stage Stage Status Assigned Worker Worker's Office Worker's Phone # Case Composition
CPS SUPERVISOR	<ul style="list-style-type: none"> Access All in District Case Search Person Search Maintain Designees Maintain Staff Maintain Unit Mark Sensitive Case Case Merge/Split Person Merge/Split Unit Summary Access View Admin Review View Call Log View Indicated View Reporter/Source View Security View Sensitive Case View Under Investigation View Unfounded 	<ul style="list-style-type: none"> This Business Function is a grouping of Security Attributes recommended for assignment to a CPS Supervisor. 		<ul style="list-style-type: none"> Refer to the Business Function that includes each Security Attribute for details about how each one works.

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CREATE FSI	<ul style="list-style-type: none"> Create Family Services Intake 	<ul style="list-style-type: none"> Allows a user to create a Family Services Intake from the Connections Toolbar. Please note that a voluntary agency worker who creates an FSI must submit it to an LDSS worker to accept. 	<ul style="list-style-type: none"> Recommended for all users who are responsible for the processing and creation of Family Services intakes within CONNECTIONS. 	<ul style="list-style-type: none"> Any worker with a role in the stage, or anyone who has access to the workload of a worker with a role in the stage, may modify an FSI. A worker can always access any case on his or her workload whether it is marked sensitive or not, but please note that the marking and unmarking of cases as Sensitive works differently for FSI than it does for current CONNECTIONS stages. The Business Function Guidelines for Mark and View Sensitive will reflect these changes. Reassigning an FSI that is marked Sensitive requires access to that worker's workload through Unit Summary. Please see the Build 18 Job Aid for more information on the process of reassigning Sensitive FSI and FSS stages.
ENTER PROG NOTE	<ul style="list-style-type: none"> Enter Progress Notes 	<ul style="list-style-type: none"> A worker who is assigned the "ENTER PROG NOTE" Business Function, and has no other access to a case, will have the ability to access, view and maintain Progress Notes, however the access will only be to the Progress Notes tab. Requires Case/Person Search BFs 	<ul style="list-style-type: none"> It is recommended that this Business Function be given to workers who need to enter Progress Notes and don't have a role in the stage, such as clerical staff. There are three distinct security rights that workers need in order to work with Progress Notes. The worker's role in the stage and his/her need to complete certain tasks dictates the rights that are assigned to that worker. 	<ul style="list-style-type: none"> Please see the Build 16 Job Aid for more information on Progress Notes.

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			<ul style="list-style-type: none"> • In order to create notes, a worker must be: <ul style="list-style-type: none"> • assigned a role in the stage; • within the assigned worker's unit hierarchy; • assigned the "ENTER PROG NOTE" Business Function, or • assigned a Progress Notes Task To-Do. • In order to modify notes, a worker must be: <ul style="list-style-type: none"> • The Progress Note's Author; or • The Progress Note's Entered By person 	
FAD CASEWORKER	<ul style="list-style-type: none"> • Access All in District • Case Search • Person Search • Maintain Closed Person Demographics • Maintain Home • Maintain Resources • View Contracts 	<ul style="list-style-type: none"> • This Business Function is a grouping of Security Attributes recommended for assignment to a FAD Worker. 		<ul style="list-style-type: none"> • Refer to the Business Function that includes each Security Attribute for details about how each one works.
FAD SUPERVISOR	<ul style="list-style-type: none"> • Access All in District • Case Search • Person Search • Maintain Closed Person Demographics • Maintain Home • Maintain Home History • Maintain Resources • Case Merge/Split • Person Merge/Split 	<ul style="list-style-type: none"> • This Business Function is a grouping of Security Attributes recommended for assignment to a FAD Supervisor. 		<ul style="list-style-type: none"> • Refer to the Business Function that includes each Security Attribute for details about how each one works.

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	<ul style="list-style-type: none"> Remove Person - Added in Error Unit Summary Access View Contracts View Security 			
MAINT AGY ACC	<ul style="list-style-type: none"> Maintain Agency Access 	<ul style="list-style-type: none"> In the Agency Access window, security access is maintained for each District/ Agency. District/ Agency staff may be granted View privileges, Maintain privileges or no privileges for each staff grouping (Case Assignable Staff, Unit Supervisor, Direct Supervisory Line.) This new functionality will only apply to the new Case and Financial Management (FSI/ FSS) stages. 	<ul style="list-style-type: none"> Only State CONNECTIONS staff with the ASSIGN ACC/ HIER BF can assign this Business Function. Locally designated users in each District/ Agency, with this Business Function, will be the only users able to maintain the Agency Access window for their District/ Agency. This is a very powerful Business Function that can allow a great deal of access to a large number of users. It is very important that a District/ Agency designate someone to perform this function who understands current and B17 Security. It is recommended that this BF only be given to two or three staff in a District/ Agency. 	<ul style="list-style-type: none"> Security functionality in place prior to B17 will not change. All of the needed functionality that will grant access through the organization hierarchy process will not apply to CPS/ FAD stages that are within the application prior to B17 implementation. Visible on the Staff Security window only if Business Function assigned to user.
MAINT APP REG	<ul style="list-style-type: none"> Maintain App Reg 	Users with this BF will be able to initiate the application registration process in WMS for child welfare cases open in CONX. Needed with Role if they are approved to open a WMS Services Case from CONX. Needed without Role if they are approved to open a WMS Services Case from CONX.	<ul style="list-style-type: none"> LDSS staff who are approved within their district to open a WMS Services Case from CONX. 	Office Type- LDSS/ State
MAINT CLSD INV	<ul style="list-style-type: none"> Maintain Closed Investigation 	This Business Function will provide the worker with the ability to:	<ul style="list-style-type: none"> Only designated Child Protective Services supervisors 	Note: Maintain Closed Investigation is a corrective

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		<ul style="list-style-type: none"> Access to the Local Data Maintenance window (all tabs) via the Case Summary window. All four tabs are available to a CPS supervisor who has MAINT CLSD INV. They are: <ul style="list-style-type: none"> Person Demographics Add/Relate Person Allegations Investigation Conclusions <p>Therefore, there is no need to give a person MAINT CLSD PERS if they have MAINT CLSD INV.</p>	<p>or above (Maintainer or Manager) should be given this function. Using this function causes changes in closed cases and could change the cases that are returned in person search when a new report comes in.</p>	<p>process only. It is to be used exclusively to correct errors or oversights in the original investigation. Maintain Closed Investigation should not be used to record new information about an investigation that is learned after the investigation is closed. For more information see the Data Maintenance Job Aid or the Online Help.</p> <p>Maintain Closed Investigation will be enabled only if the worker meets the following access requirements.</p> <ul style="list-style-type: none"> The staff person must have the Business Function MAINT CLSD INV; in addition, Investigation Stage (CPS or IAB) must be closed; and Worker must be at the Supervisor level or above; and Worker must be from the same district/agency as the primary worker when the stage was closed, and Closed stage is not associated with any open ARI stage.
MAINT CLSD PERS	<ul style="list-style-type: none"> Maintain Closed Person Demographics 	<ul style="list-style-type: none"> This Business Function will provide the worker with access to the Local Data Maintenance window (only Person Demographics tab) via the Case Summary window in Modify mode. 	<ul style="list-style-type: none"> Only designated FAD or CPS staff should be given this function. Because of the potential for an effect on other cases, it should only be assigned to staff who are knowledgeable about the process. 	<ul style="list-style-type: none"> Only the Person Demographics Tab is enabled with this Business Function, and only if the worker meets the following access requirements: The staff person must have the Business Function MAINT CLSD PERS;

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				<p>In addition,</p> <ul style="list-style-type: none"> Investigation Stage (CPS or IAB) must be closed; and Worker must be from the same district/agency as the primary worker when the stage was closed, <p>and either:</p> <ul style="list-style-type: none"> Closed stage is not associated with any open ARI stage, or Worker is Primary worker of associated open ARI stages.
MAINT CONTRACTS	<ul style="list-style-type: none"> Maintain Contracts 	<ul style="list-style-type: none"> Allows users to maintain all contracts in their district and have statewide view of all of all contracts in CONNECTIONS. 	<ul style="list-style-type: none"> This Business Function should be assigned to all local district accounting staff and other staff who maintain contracts. 	
MAINT DESIGNEES	<ul style="list-style-type: none"> Maintain Designees 	<ul style="list-style-type: none"> Allows users to temporarily assign <i>their own</i> Business Functions to another individual in their district. 	<ul style="list-style-type: none"> It is recommended that LDSS assign this Business Function to all supervisory staff. 	<ul style="list-style-type: none"> Supervisors may use this Business Function to grant their Business Functions to another worker in their absence. Staff with the MAINT SECURITY Business Function also can assign the Business Functions of one individual in their district to another individual in their district. (see MAINT SECURITY)
MAINT EDUCATION	<ul style="list-style-type: none"> Enter Education 	<ul style="list-style-type: none"> MAINT Education BF works in conjunction with the Case Search (if Voluntary Agency) <u>or</u> the Case/ Pers Srch BF (if LDSS),i.e. the user must have both to access Education (without a role). Path: Case Search > Case Summary->Options menu -> Stage Maint menu -> Maintain Education menu item (opens in Modify mode unless stage is pending closure). 	<p>It is recommended that a staff person who has responsibility for the entry of education information, but no other responsibility for the stage, should be given this Business Function.</p>	<ul style="list-style-type: none"> The <i>district</i> of the case includes the district or agency of a worker with a role (CM, CP, CW). Office Types: District / Voluntary Agency/ RO/ DJJOY (DFY) / CQC / OMH/ OMRDD MAINT EDUCATION BF is not needed if the worker has a role in the stage.

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		<ul style="list-style-type: none"> The Maintain Education menu item on the Case Summary window will be enabled when: <ol style="list-style-type: none"> Worker has the Business Function "MAINT EDUCATION" Worker has selected an open FSS stage with stage type of CWS or CCR or ADVPO. Worker is from the same district/local agency as one of the workers assigned to the stage (CM, CP, CW). For stages pending closure, the worker with the MAINT EDUCATION BF will enter in browse mode only. There is no access to closed stages with the MAINT EDUCATION BF. 		<ul style="list-style-type: none"> There is no maintenance permitted of Education information once a stage is pending closure or closed. AGENCY ACCESS CONSIDERATIONS When the district or agency uses the Agency Access Window settings, in order to prevent someone with the MAINT EDUCATION BF who is only intended to access Education Dialog from this path, from accessing events on the Case List window, the district or agency will need to take action make sure that all of these apply to the user. The user is: 1. Not Case Assignable and 2. Not a Unit Approver and 3. Not in a Supervisory Unit in the Organizational Hierarchy and 4. Does not have a Job Type <p>If this is done, and your Agency Access settings change the user will still not be able to access events. Refer to the Guide to Using the Maintain Agency and Organizational Hierarchy Functions in CONNECTIONS and the CONNECTIONS Step-by-Step Guide: Security for more information</p>
MAINT FAD	<ul style="list-style-type: none"> Maintain Home 	<ul style="list-style-type: none"> Allows access to the FAD dialog from the CONNECTIONS toolbar (Maintain menu) to develop a home. Allows users to perform statewide searches and/or add a home to the Resource Directory. 	<ul style="list-style-type: none"> This Business Function should be assigned to local district staff, including homefinders and others, who will be developing foster/adoptive homes and relative foster homes. 	<ul style="list-style-type: none"> CPS staff who will be developing expedited relative homes will need to be assigned this Business Function. Staff who are <i>not</i> assigned to a home will only be able to view basic information about a home.

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MAINT FAD HIST	<ul style="list-style-type: none"> Maintain Home History 	<ul style="list-style-type: none"> Allows users to change authorizing dates and status information only on the FAD Home History Detail window. 	<ul style="list-style-type: none"> This Business Function should be assigned to local district staff who have "MAINTAIN FAD", but perhaps to a smaller number of users to ensure changes to history are carefully controlled. 	
MAINT HEALTH	<ul style="list-style-type: none"> Maintain Health 	<ul style="list-style-type: none"> Users with this BF may update/view Health information for all children for which his/her agency has been designated as having health care responsibility. Must be assigned the Case/Pers Srch BF. BF allows access to the Health dialog via the Case Search path. No other dialogs are enabled. 	<ul style="list-style-type: none"> Persons, who do not have a role in the stage and who are responsible for documenting/ updating health information and maintaining the medical history for all children in a district or agency; such as a Nurse, other health care professional, or care coordinator. Refer to the Health Services Job Aid for further detail. Not needed with role to access a child on their workload. It is needed without Role see description at left for Assignment. 	LDSS, VA, DRS
MAINT ON-CALL	<ul style="list-style-type: none"> Maintain On-Call 	<ul style="list-style-type: none"> Allows users to maintain their LDSS On-Call lists. 	<ul style="list-style-type: none"> It is recommended that multiple individuals be assigned this Business Function. 	<ul style="list-style-type: none"> Up to date, accurate information is imperative for the SCR assignment of reports. Workers can view other district's On-Call lists (<i>without</i> a Business Function) through the assign process.
MAINT ORG HIER	<ul style="list-style-type: none"> Maintain Organizational Hierarchy 	<ul style="list-style-type: none"> This Business Function allows the user to maintain the organizational hierarchy that is displayed for the user's District. Organizational Hierarchy works in conjunction with the Agency Access window. Changing a unit's position within the organizational hierarchy of the District 	<ul style="list-style-type: none"> Only State CONNECTIONS staff with the ASSIGN ACC/ HIER Business Function can assign this Business Function. Locally designated users in each District with this Business Function will be able to maintain the Organizational Hierarchy window for their 	<ul style="list-style-type: none"> Security functionality in place prior to B17 will not change. All of the needed functionality that will grant access through the organization hierarchy process will not apply to CPS/ FAD stages that are within the application prior to B17 implementation.

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		<p>offers the ability to implicitly grant security access rights to individuals at higher management levels. Anyone in an organization in a direct supervisory line above a worker with a role in a case can have access to that case, if that option is chosen on the Agency Access window.</p> <ul style="list-style-type: none"> This new functionality will only apply to new Case and Financial Management (FSI/ FSS stages) but all units will be displayed and can be moved. A Unit's position is changed by right clicking on the unit and dragging and dropping it to the subordinate or supervisory position. The supervisory unit field on the Unit List window will be blank until these supervisory changes are made in the Organization Hierarchy window, then the Supervisory Unit will display after B17. 	District.	<ul style="list-style-type: none"> Visible on the Staff Security window only if this Business Function assigned to user.
MAINT REPD ERR (Maintain Reported in Error)	<ul style="list-style-type: none"> Maintain Person Role 	<ul style="list-style-type: none"> Allows users with the appropriate access to change a person's role in the investigation stage to Reported in Error on the Person Detail window. (For CPS Cases only) This role should only be assigned when the individual does not fall under the definition of a subject or other person named in the report (SSL 412), and/or clearly should not have been included in the report. 	<ul style="list-style-type: none"> Local discretion should be used in assigning this Business Function, keeping in mind that the need to perform this function occurs <u>infrequently</u>. It should only be assigned to staff who are knowledgeable about the process and impacts of the Maintain Reported in Error functionality. 	<ul style="list-style-type: none"> When a person's role is updated to reported in error, a number of system edits and internal processes take place. Refer to the Build 15 CPS Job aid for a comprehensive description of the process.
MAINT RESOURCES	<ul style="list-style-type: none"> Maintain Resources 	<ul style="list-style-type: none"> Allows users to add and maintain the following types of resources in the Resource Directory: providers, non- 	<ul style="list-style-type: none"> Assigning this Business Function allows a user to maintain all resources listed in 	<ul style="list-style-type: none"> Please refer to the FAD Step By Step guide for more detail about maintaining resources,

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		FAD facilities, law enforcement, hotlines/helplines, and schools.	the description. However, it is suggested that the responsibility by type of resource may be divided as follows: providers maintained by accounting staff; facilities, which will encompass preventive programs, maintained by preventive staff; law enforcement, hotlines/helplines, and schools maintained by clerical staff. Alternatively, creating a unit of people responsible for all aspects of maintaining resources should be considered.	
MAINT SECURITY	<ul style="list-style-type: none"> Maintain Security View Business Functions 	<ul style="list-style-type: none"> Allows users to view the available Business Functions for their office type (State, local district, Regional Office, DFY, voluntary agency and other state agencies: CQC, CCF, OMH and OMRDD) Allows users to assign those Business Functions to staff in their district. Allows users to assign one individual's Business Function Profile to another individual in their district through the Assignee process. 	<ul style="list-style-type: none"> LDSS should assign this Business Function to the Security Coordinator and the Backup Security Coordinator for their district. Local Districts with multiple sites should consider assigning this Business Function to at least two individuals at each site. 	<ul style="list-style-type: none"> The Security Coordinator, or other user who has this Business Function, can, in turn, assign this function to other staff within their district. If the need arises, this Business Function gives the user the capability to assign the Business Functions of one staff person in the district to another individual in the district. Please note that individuals with MAINT SECURITY will be able to modify information for all staff in their district.
MAINTAIN OFFICE	<ul style="list-style-type: none"> Maintain Office 	<ul style="list-style-type: none"> Allows users to access the Office Dialog with the ability to add, modify and delete office information for their own district. 	<ul style="list-style-type: none"> LDSS may want to assign this Business Function to a select few individuals at their district or office sites. 	<ul style="list-style-type: none"> Please note that individuals having this Business Function will be able to modify information for all offices in their district.
MAINTAIN	<ul style="list-style-type: none"> Maintain Staff 	<ul style="list-style-type: none"> Allows users to access the Staff Dialog 	<ul style="list-style-type: none"> LDSS may want to assign this 	<ul style="list-style-type: none"> Please note that users with

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STAFF		with the ability to add, modify and delete staff information for their own district.	Business Function to an individual in each unit, such as the unit supervisor or unit maintainer.	MAINTAIN STAFF will be able to modify information for all staff in their district, including case assignable.
MAINTAIN UNIT	<ul style="list-style-type: none"> Maintain Unit 	<ul style="list-style-type: none"> Allows users to access the Unit Dialog with the ability to add, modify and delete unit information for the units in their district. 	LDSS may want to assign this Business Function to an individual in each unit, such as the unit supervisor or unit maintainer.	<ul style="list-style-type: none"> Users with MAINTAIN UNIT will be able to modify information for all units in their district
MARK SENSITIVE	<ul style="list-style-type: none"> Mark Sensitive Case 	<ul style="list-style-type: none"> Allows users to designate a case as "sensitive". 	<ul style="list-style-type: none"> This Business Function should be assigned to CPS staff responsible for assigning Intakes. Cases should only be marked "sensitive" if they involve person reported to the SCR who are employed by the LDSS or OCFS. 	<ul style="list-style-type: none"> Workers assigned a role in a sensitive case can access the case <u>without</u> this Business Function. Assigning an FSI as Sensitive does not require the Mark Sensitive if that indication is being accomplished from the user's workload.
MERGE/SPLIT	<ul style="list-style-type: none"> Person Merge/Split Case Merge/Split 	<ul style="list-style-type: none"> The Merge/Split functionality requires having the Business Function MERGE/SPLIT regardless of the role in the case. Allows users to merge persons and cases when there are subsequent CPS reports, and when new case information needs to be associated with a person or case. Also allows users to split persons and cases that were previously merged. 	<ul style="list-style-type: none"> Local discretion should be used in assigning this Business Function, keeping in mind that the need to perform this function occurs regularly It should only be assigned to staff who are knowledgeable about the process and impacts of the Merge/Split functionality. 	<ul style="list-style-type: none"> The ability to merge and split case/person information helps maintain the integrity of the person/case data. The procedures for performing this function are covered in both the Build 15 Job Aid for CPS and the Build 15 Job Aid for FAD.
PERSON UNRELATE	<ul style="list-style-type: none"> Person Unrelate 	<ul style="list-style-type: none"> Allows a user to unrelate persons who were incorrectly related during the Intake Stage on the Person Detail window. (For Child Protective Cases only) 	<ul style="list-style-type: none"> This Business Function should be assigned to CPS caseworkers, supervisors and managers who are responsible for person maintenance in a CPS investigation stage or in a Family Services stage. Because of the potential for an effect on other cases, it should 	<ul style="list-style-type: none"> When the PERSON UNRELATE functionality is used, a number of system edits and internal processes take place. Refer to the Build 15 CPS Job aid and the Build 18 Case Management Step-By-Step Guide for a comprehensive description of the process.

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			only be assigned to staff who are knowledgeable about the process and impacts of the PERSON UNRELATE functionality.	
REM PER ADD ERR (Remove Person Added in Error)	<ul style="list-style-type: none"> Remove Person – Added in Error 	<ul style="list-style-type: none"> Allows a user to remove persons from stages who were incorrectly added (either new or related) in stages other than the Intake stage on the Person Detail window. 	<ul style="list-style-type: none"> It is recommended that this Business Function be given to Child Protective Staff and FAD staff who have responsibility for person maintenance in a stage. It should only be assigned to staff who are knowledgeable about the process and impacts of the Remove Person Added in Error functionality 	<ul style="list-style-type: none"> For a person who is misrelated or added outside an Intake Stage (INV, ARI, or FAD), the Remove Person – Added in Error menu item will be available in the Person List Options menu to users with the appropriate security. When this function is invoked, the misrelated individual will be removed from the stage.
SIGN CONTRACTS	<ul style="list-style-type: none"> Sign Contracts 	<ul style="list-style-type: none"> Allows users to complete a contract, which then allows a new contract period to be entered. 	<ul style="list-style-type: none"> This Business Function should be given to staff who maintain contracts or who supervise staff who maintain contracts. 	
STANDARD ACCESS		<ul style="list-style-type: none"> At least one Business Function needs to be associated with each user to gain access to the CONNECTIONS toolbar. 	<ul style="list-style-type: none"> This is a placeholder automatically given to users when first added to CONNECTIONS. STANDARD ACCESS enables the TO DO, Workload, Resource, Staff and Reports icons. 	<ul style="list-style-type: none"> Only necessary for users without another Business Function attached to their logon ID. .
UNIT SUM ACCESS	<ul style="list-style-type: none"> Unit Summary Access 	<p>In combination with being the Unit Approver or having a role above the Unit Approver in the unit:</p> <ul style="list-style-type: none"> Allows users to have maintain access to <i>stages</i> in the Assigned Workloads of staff in their unit(s). Allows users to have view access (subject to assigned Business Functions) to <i>cases</i> associated to the Assigned Workloads of staff in their 	<ul style="list-style-type: none"> It is recommended that LDSS assign this Business Function to individuals in each unit with a role of supervisor (designated as a unit approver), manager or maintainer who need to gain access to cases in the Assigned Workloads of staff in that unit. 	<ul style="list-style-type: none"> This will give the same maintain access to stages as the assigned worker. View access will be subject to assigned Business Functions.

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Business Function (BF)	Security Attributes	Description	Recommendations	Comments
		unit(s).		
VAC AWARD/ CLOSE	<ul style="list-style-type: none"> Maintain Closed to Intake/CD Awards 	<ul style="list-style-type: none"> This Business Function will provide the worker with the ability to: <ul style="list-style-type: none"> Access the Vacancy Control CD Borough Award window in modify mode (NYC/ACS workers only) Access the Vacancy Control Closed to Intake window in modify mode. 	<ul style="list-style-type: none"> It is recommended that staff responsible for specifying which agencies have been awarded a neighborhood-based service contract be given this function. Only designated staff should be given the Closed to Intake function as it causes facilities to no longer be returned in searches for the agency that closed it to intake. A worker must have this Business Function to modify information in this window. If a worker only has the VACANCY SEACH Business Function, he or she can access the window in inquiry mode only. 	<ul style="list-style-type: none"> CD awards apply to Foster Boarding Homes; Borough Awards apply to agencies that operate Congregate Care Facilities. The Closed to Intake window allows designated local district and OCFS workers to cause facilities to no longer be returned in a Vacancy Control Facility Search result. If OCFS closes a facility to intake, it is not returned in any searches.
VACANCY MAINT	<ul style="list-style-type: none"> Bed Maintenance 	<ul style="list-style-type: none"> This Business Function will provide the worker with the ability to access the Vacancy Control Bed Maintenance window in modify mode. (Please note that facilities in Applicant status will not be returned using the Vacancy Control Search.) 	<ul style="list-style-type: none"> It is recommended that staff responsible for maintaining resources be given this function. 	<ul style="list-style-type: none"> For bed information to be maintained, the facility must be in either Accepted – Active or Applicant status In order to perform modifications to a bed using the Vacancy Control Bed Maintenance window, a user must have the VACANCY MAINT Business

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Business Function (BF)	Security Attributes	Description	Recommendations	Comments
				Function AND one of the following: <ul style="list-style-type: none"> The worker must be from the same district/agency that owns the facility; or the facility must be on the worker's Assigned Workload.
VACANCY SEARCH	<ul style="list-style-type: none"> Vacancy Control Search 	<ul style="list-style-type: none"> Search for beds using the Vacancy Control search window Modify the Bed Status Child Info and Date Bed Expected Vacant fields in the Vacancy Control Bed Detail window View the Vacancy Control Closed to Intake window in inquiry mode View the Vacancy Control CD/Borough Award window in inquiry mode View the Vacancy Control Bed Maintenance window in inquiry mode, when the Vacancy Control Bed Maintenance task displays on the worker's Task List 	<ul style="list-style-type: none"> It is recommended that staff responsible for placements be given this function. 	Please refer to the Build 15.1 Vacancy Control Job Aid or the FAD Step by Step Guide for more information.
VIEW ADMIN REV	<ul style="list-style-type: none"> View Admin Review 	<ul style="list-style-type: none"> Allows users to view the Administrative Review Stage for cases in their Assigned Workloads. 	<ul style="list-style-type: none"> It is recommended that this Business Function be assigned to all CPS caseworkers, supervisors and managers. 	<ul style="list-style-type: none"> Only the SCR can <i>open</i> an Administrative Review Stage.
VIEW AGY ACC	View Agency Access	<ul style="list-style-type: none"> Users in a District/ Agency with the proper security will be given access to view the Agency Access window for their District/ Agency. This new functionality will only apply to the new Case and Financial Management (FSI/ FSS) stages. 	<ul style="list-style-type: none"> Locally designated users in each District/ Agency, with this BF, will be able to view the Agency Access window for their own District/ Agency. 	<ul style="list-style-type: none"> Security functionality in place prior to B17 will not change. All of the needed functionality that will grant access through the organization hierarchy process will not apply to CPS/ FAD stages that are within the application prior to B17 implementation.
VIEW CALL LOG	<ul style="list-style-type: none"> View Call Log 	<ul style="list-style-type: none"> Allows user view access to the Call Log window, so CPS reports assigned to their districts by the SCR can be 	<ul style="list-style-type: none"> It is recommended that this Business Function be assigned to all CPS caseworkers, 	

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Business Function (BF)	Security Attributes	Description	Recommendations	Comments
		tracked.	supervisors and managers.	
VIEW CONTRACTS	<ul style="list-style-type: none"> View Contracts 	<ul style="list-style-type: none"> Allows users statewide view of all contracts in CONNECTIONS. 	<ul style="list-style-type: none"> This Business Function should be assigned to Directors of Service and/or administrative staff who may be involved in negotiating or procuring contracts. 	
VIEW HEALTH	<ul style="list-style-type: none"> View Health 	<ul style="list-style-type: none"> Users with this BF who also have the access all in district or agency BF may view health information for any child in a case where that district or agency has a role in the stage (or had a historical role in the case) and has or had been designated as responsible for updating the health information. For Implied Role: When accessing other FSS stages via Implied Role, the Health tab will only be enabled when the person in common is in any open INT, INV or ARI stage on the user's workload. 	<ul style="list-style-type: none"> Persons who need to access health information on a district or agency wide basis, such as an Administrator or Service Director who do not have a role in the stage, or access via unit summary. The BF must be assigned with the access all in district or agency BF to first gain access to the stage. The View Health BF allows them further access to Health information. Refer to the Health Services Job Aid for further detail. Not needed with Role to access a child on their workload. It is needed without Role. See Description at left. 	Office Type- LDSS, VA, DRS, RO, State
VIEW INDICATED	<ul style="list-style-type: none"> View Indicated 	<ul style="list-style-type: none"> Allows users to view approved indicated CPS investigations. 	<ul style="list-style-type: none"> It is recommended that this Business Function be assigned to all CPS caseworkers, supervisors and managers. It is recommended that prior to implementation of Phase 2, this profile be assigned to those workers who do not have an investigation role in CPS cases, if local districts wish such workers to have view access to closed indicated stages. 	<ul style="list-style-type: none"> CPS workers need this Business Function to view any indicated stages. This Business Function, in combination with CASE/PERS SRCH, will allow basic information to be seen for approved indicated investigations.
VIEW ORG	<ul style="list-style-type: none"> View Organizational 	<ul style="list-style-type: none"> The organizational hierarchy is 	<ul style="list-style-type: none"> Locally designated users in 	<ul style="list-style-type: none"> Security functionality in place

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HIER	Hierarchy	<p>displayed for the user's District/ Agency with all the units for their own District/ Agency.</p> <ul style="list-style-type: none"> Organizational Hierarchy works in conjunction with the Agency Access window. This new functionality will only apply to the new Case and Financial Management (FSI/ FSS) stages but all units will be displayed. The supervisory unit field on the Unit List window will be blank until these supervisory changes are made in the Organizational Hierarchy window, then the Supervisory Unit will display after B17. 	<p>each Agency with this Business Function will be able to view the Organizational Hierarchy window for their Agency.</p>	<p>prior to B17 will not change. All of the needed functionality that will grant access through the organizational hierarchy process will not apply to CPS/ FAD stages that are within the application prior to B17 implementation.</p>
VIEW RPTR/ SOURC	<ul style="list-style-type: none"> View Reporter/ Source 	<ul style="list-style-type: none"> Allows users to view the reporter/source information for all CPS cases in which they have a role. 	<ul style="list-style-type: none"> It is recommended that this Business Function be assigned to all CPS caseworkers, supervisors and managers who are responsible for investigations. 	<ul style="list-style-type: none"> CPS Caseworkers could not see the Reporter/Source information for CPS cases in their Assigned Workload without this Business Function.
VIEW SECURITY	<ul style="list-style-type: none"> View Security 	<ul style="list-style-type: none"> Allows users to view the Business Functions that are assigned to all workers in their district. 	<ul style="list-style-type: none"> Local Districts may want to assign this Business Function to supervisors and security coordinators. 	<ul style="list-style-type: none"> Individuals having this Business Function will be able to trouble shoot when staff are having trouble accessing information.
VIEW SENSITIVE	<ul style="list-style-type: none"> View Sensitive Case 	<ul style="list-style-type: none"> Allows users <u>without a role</u> to view sensitive case 'basic information' from the case and person search result. (see CASE/PERS SRCH Business Function) 	<ul style="list-style-type: none"> It is recommended that this Business Function be assigned to a small subset of individuals assigned the Case and Person Search Business Functions. This Business Function needs to be given to individuals in combination with the CASE/PERS SRCH Business Function. 	<ul style="list-style-type: none"> Workers assigned a role in a sensitive case can access the case <u>without</u> this Business Function. Assigning an FSI as Sensitive does not require the Mark Sensitive or View Sensitive Business Function if that indication is being accomplished from the user's workload.
VIEW UNDER INV	<ul style="list-style-type: none"> View Under Investigation 	<ul style="list-style-type: none"> Allows users to view investigations and their corresponding intakes prior 	<ul style="list-style-type: none"> It is recommended that this Business Function be assigned 	<ul style="list-style-type: none"> CPS workers assigned to an investigation stage do not need

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Business Function (BF)	Security Attributes	Description	Recommendations	Comments
		<p>to an approved determination.</p> <ul style="list-style-type: none"> VIEW UNDER INV, in combination with CASE/PERS SRCH will allow 'basic information' to be seen for undetermined investigations. 	<p>to all CPS caseworkers, supervisors and managers.</p> <ul style="list-style-type: none"> It is recommended that prior to implementation of Phase 2, this profile be assigned to those workers who do not have an investigation role in CPS cases, if local districts wish such workers to have view access to under investigation stages assigned to other workers. 	<p>this Business Function to maintain their stage with the below exception; however, they do need this Business Function to view open investigation stages assigned to other workers.</p> <ul style="list-style-type: none"> Workers need this Business Function to access, update and print narratives in a CPS investigation
VIEW UNFOUNDED	<ul style="list-style-type: none"> View Unfounded 	<ul style="list-style-type: none"> Allows users to see that an unfounded stage and the related intake stage exists from a case/person search result. Allows users with a role in the case to view all information for unfounded stages and related intake stages for all unfounded reports linked to individuals in their cases. 	<ul style="list-style-type: none"> It is recommended that this Business Functions be assigned to all CPS caseworkers, supervisors and managers who are responsible for investigations. 	<ul style="list-style-type: none"> This Business Function, in combination with CASE/PERS SRCH, will allow 'basic information' to be seen for unfounded reports.