CONNECTIONS Security Tip Sheet

Using Reminder To-Dos for Sharing Confidential Information

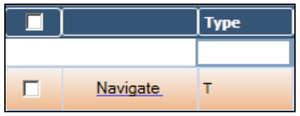
April 2014

Email systems do not provide sufficient security to preserve the confidentiality of information. *When confidential case and individual client information needs to be shared, the CONNECTIONS system is the most secure method for doing so - and should be used whenever possible. In CONNECTIONS, a Reminder To-Do can be created for any user to securely convey confidential information. This Tip Sheet explains how to create and manage Reminder To-Dos.*

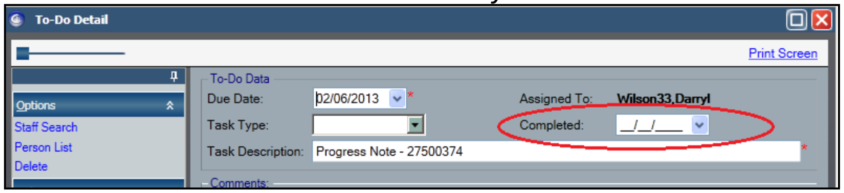
Types of To-Dos

There are three types of To-Dos available in CONNECTIONS:

- **Reminder To-Dos** can be created by and for any CONNECTIONS user. They can be used to help you remember something that needs to be completed (e.g., scheduling a meeting) or can be created and assigned to another CONNECTIONS user (e.g., sending confidential information to someone or asking your supervisor to review your work). Reminder To-Dos can be deleted when no longer needed.
- **Alert To-Dos** are created by the CONNECTIONS system to notify workers that something has happened or needs to happen. Alert To-Dos are sent, for example, when a new stage is assigned to your workload, when a Safety Assessment, FASP or PHR is coming due or when a person in a stage on your workload is involved in a new CPS report. Alert To-Dos, like Reminder To-Dos, can be deleted when they are no longer needed.
- **Task To-Dos** can be either system- or user-generated to notify workers that there is a task that must be completed by a particular date. Task To-Dos cannot be deleted. System-generated Task To-dos can only be removed from your To-Do list by using the *Navigate* link and completing the task.



User-generated Task To-Dos must have a completion date entered on the Task To-Do Detail window in order for them to be removed from your To-Do list.



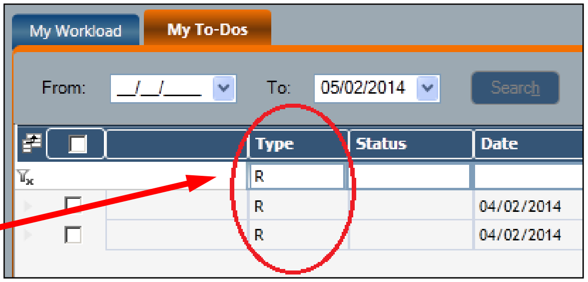
Managing To-Dos

It is essential to regularly review your To-Dos so that important information is not overlooked.

To-Do grid column headers and the filter bar can be used to sort and filter the To-Do list, making individual items easier to find.

Hint: Entering a letter in the Type column of the filter bar will filter out all but the type of To-Do you want to see.

Use "**A**" for Alert, "**T**" for Task and "**R**" for Reminder To-Dos.



In order to keep the To-Do list from becoming unmanageable, non-Task To-Dos are automatically deleted according to the following time table:

To-Dos displayed for 30 Days	To-Dos displayed for 90 Days	To-Dos displayed for 180 Days
• INT Stages	• FSI Stages	• FAD Stages
• INV Stages (including IAB)	• FSS Stages	
• ARI Stages		
• To-Dos not associated with a Stage		

Navigable Task and Approval To-Dos *are not deleted*; they remain on the To-Do list until the associated task is completed.

New To-Dos appear at the *bottom* of your To-Do list, so deleting Alerts and Reminders that are no longer needed is highly recommended.

Creating a Reminder To-Do

If confidential information must be transmitted from one worker to another, using a CONNECTIONS Reminder To-Do is much more secure than using an e-mail message.

There are two paths by which to create a Reminder To-Do:

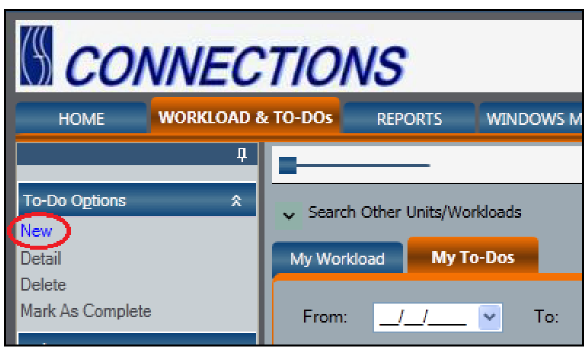
- from your Workload or
- from the My To-Do tab

Reminder To-Dos that are created from the workload will automatically display the case name, stage ID and stage name associated with the To-Do while those created on the My To-Dos tab will not:

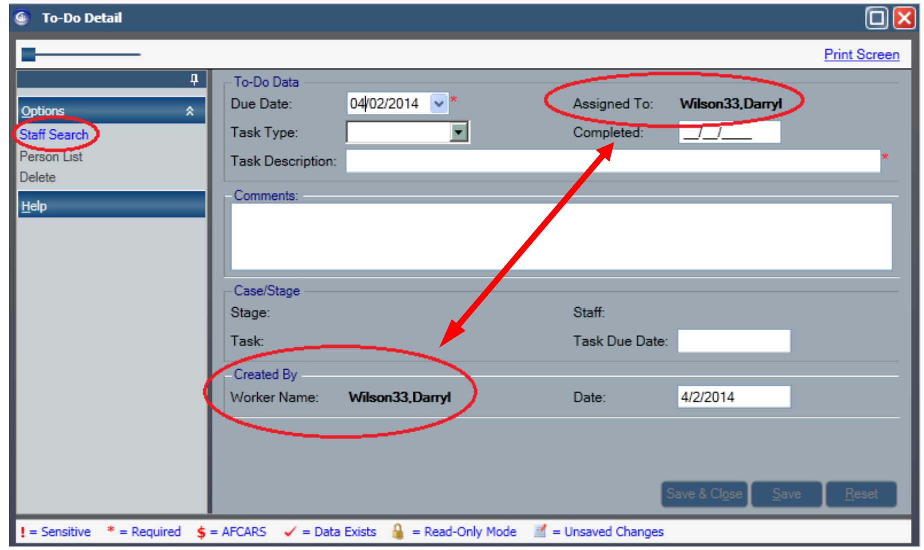
Type	Status	Date	Case Name	Stage ID	Stage Name
R					
R		04/02/2014	Gray,April	25800115	Gray,April
R		04/02/2014			

Creating a Reminder To-do from the My To-Dos Tab

1. Click on the My To-Dos tab
2. Click the *New* link in the To-do Options section of the left navigation pane.



3. Complete the To-Do Detail window.
4. Click the Save or the Save & Close button.

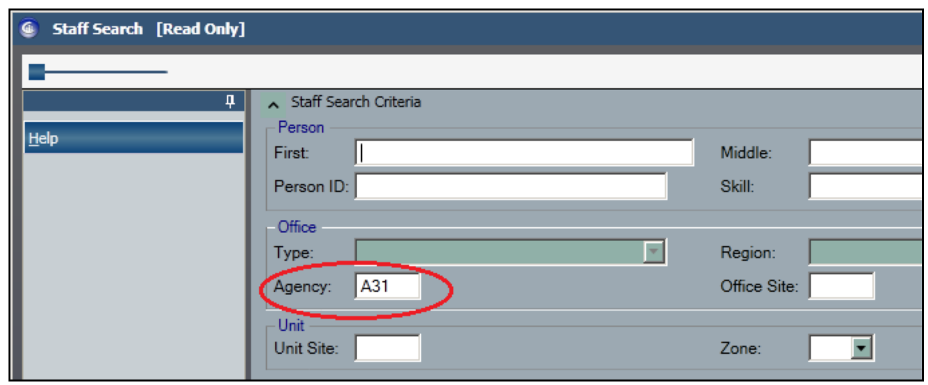


The Comments field in a Reminder To-Do can accommodate up to 2,000 characters.

By default, the Reminder To-Do will be assigned to the worker creating it.

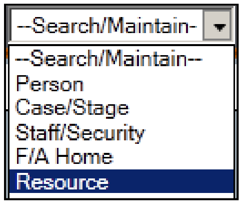
If you want the To-Do assigned to someone else, click the Staff Search link in the Options section of the left navigation pane on this window.

The resulting Staff Search window will default to your own agency.

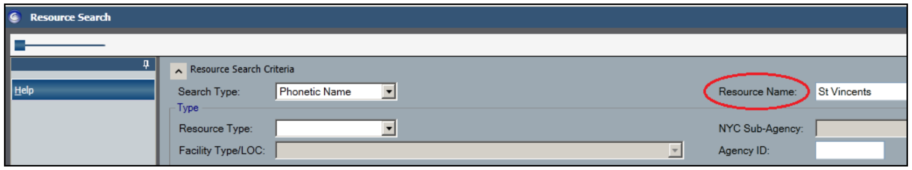


If you wish to assign the To-Do to someone, in a different district or agency, you must enter the Agency Code for that district or agency.

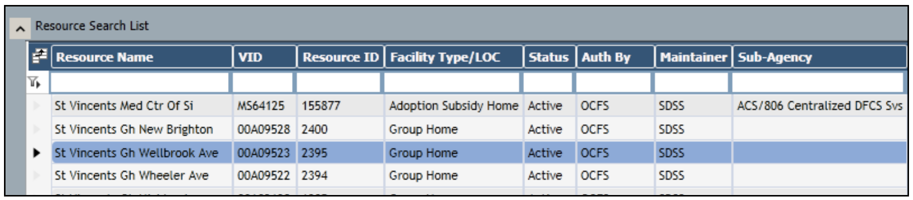
Don't know the Agency Code? You can find it in CONNECTIONS by searching the Resource directory:



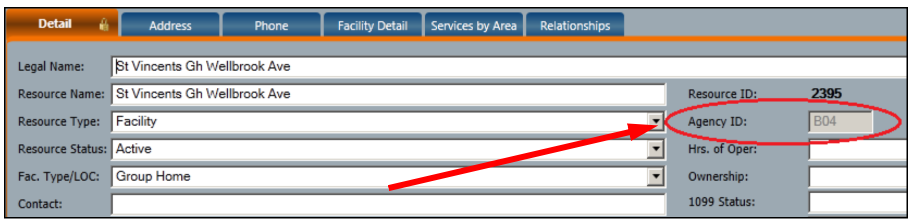
- Select Resource from the Search/Maintain menu
- Enter the name of the district/agency in the "Resource Name" field and click the *Search* button.



- Highlight the entry you wish to see from the search results

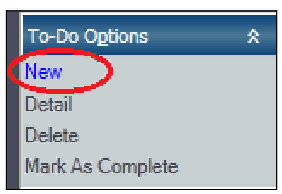


- The Agency Code can be found in the "Agency ID" field on the Detail tab.

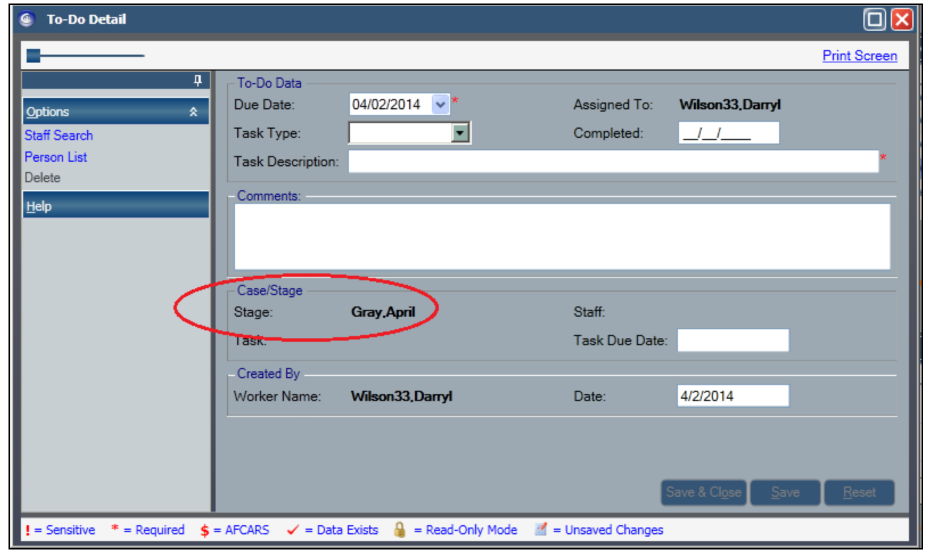


Creating a Reminder To-Do from the Workload

1. From your workload, highlight the stage for which you wish to create a Reminder To-Do.
2. Click the *New* link in the To-do Options section of the left navigation pane.



The selected case name will display on the To-Do Detail window.



3. Complete the To-Do Detail window.
4. Click the Save or the Save & Close button.

For More Information on Securely Sharing Information

See the OCFS document, "Guidelines for Using Electronic Communication for Sharing Case Specific Information" for more information on this topic. This document is available on the CONNECTIONS Security page of the OCFS Internet site at http://www.ocfs.state.ny.us/connect/security/ .

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

Resources:

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

CONNECTIONS Regional Implementation Staff:
http://ocfs.state.nyenet/connect/contact.asp

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

CONNECTIONS Communications
CONNECTIONSCommunications@dfa.state.ny.us

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