New York State Office Of Children & Family Services

Using the

Agency Access

And

Organizational Hierarchy

Functionality

In CONNECTIONS

AGENCY ACCESS WINDOW

Security Coordinators can provide access privileges to workers within their own districts/ agencies, aside from the assignment of Business Functions, using the Agency Access window to create and maintain access privileges for their own agencies. Agency staff can be granted view, maintain or no privileges for each staff grouping (Case Assignable Staff, Unit Approver, Direct Supervisory Line).

First, Agency Access needs to be created for each agency. If the Agency Access window is opened in either view-only or modify mode before Agency Access has been recorded and saved in CONNECTIONS, the default access for all staff groupings is NONE and the following message displays:

"Agency Access Information has not yet been entered."

The Implementation Coordinator for each district or agency must request the assignment of the Business Function Maintain Agency Access or Maintain Organizational Hierarchy from OCFS CONNECTIONS staff. The form and instructions to do this are on the CONNECTIONS website or can be obtained from your CONNECTIONS Regional Office liaison.

Once the Security Coordinator has established Agency Access, the most current data will be retrieved each time the Agency Access window opens. Agency Access affects Family Services Intake (FSI), Family Services Stages (FSS) (Build 18 stage types), and Build 19 functionality.

In order to view the Agency Access window, a worker's Business Function Profile (BFP) must include the VIEW AGY ACC Business Function. To maintain this window, the worker's BFP must include the MAINT AGY ACC Business Function.

The Agency Access window works in conjunction with the Organizational Hierarchy window. The organizational hierarchy of each district/agency is viewed and maintained on the Organizational Hierarchy window.

The District/Agency field at the top of the window automatically populates with the worker's own district/agency code. For example, if the worker's Agency ID is A01, "A01" displays in the District/Agency field.

The main body of the Agency Access window is divided into three sections:

Case Assignable Staff	This section works in conjunction with the Case Assignable checkbox on the Staff Detail window, the unit to which the worker is assigned, and the worker's Job Type, and applies only to staff that have this checkbox checked. Three staff groupings are included in this section: • All Within District provides access to all cases in the district/ agency • All Within Unit provides access to all cases in the same unit. • All Within Same Job Type provides access to all cases that are of the same Job Type as the staff person.

	Example: A Supervisor with Maintain All Within Job Type (Agency Access) and Access All in District Business Function (BF) will be able to see the workloads of all other Supervisors within the district. There will be a royal blue title bar when the access is based on the Agency Access.
Unit Approver	This section is used only for staff with Unit Approver status in the district/agency, whether In- or Out-Assigned. Two staff groupings are included in this section: • All Within District will provide access to all cases in the district/agency for all Unit Approvers. • All Within Same Unit Spec will provide access to all cases within the same unit specialization for all Unit Approvers. *Example: Unit Approvers with Maintain Agency Access and Access All in District BF will be able to see the workloads and maintain these workloads for all Unit Approvers in their district. Remember that this privilege only applies to Build 18 (Case Management) and Build 19 stages. If the Unit Approver can see these workloads only as a result of the Agency Access, there will be a royal blue title bar.*
Direct Supervisory Line	This section works in conjunction with the Organizational Hierarchy window. Two staff groupings are included in this section: • All Staff provides access to all cases within a direct supervisory line for all staff, regardless of Job Type. • All Non-Clerical Staff provides access to all cases within a direct supervisory line for all staff with a Non-Clerical Job Type. If a worker has not been assigned a Job Type, he or shi is considered Clerical. *Example: A member is assigned to the Supervisory Unit and has been granted View Agency Access with Access All in District BF. The case must be viewed by going through Case Search. This will be in Browse mode only. No updates can be made to this record.*

The Security Coordinator can assign View, Maintain, or No access by clicking on the corresponding radio button for each staff grouping within each section, as appropriate.

Two buttons display at the bottom of the Agency Access window: Save and Cancel

Save	This button saves the information to the database and closes the Agency Access window. This button enables only if unsaved changes have been made to the window. Clicking on the Save button displays the following message: " Changes have been saved." • Click on the OK button in response to this message to close the Agency Access window.
Cancel	This button discards any unsaved information and closes the Agency Access window. If the window was opened in view-only mode, clicking on this button closes the

	window. If the window was opened in modify mode and unsaved changes have been made to the window, clicking on the Cancel button displays the following message: "Do you want to exit? Unsaved data and/or narrative(s) will be lost." • Click on the Yes button to discard any unsaved information and close the Agency Access window. • Click on the No button to keep the window open without discarding unsaved information.

ACCESSING THE AGENCY ACCESS WINDOW IN VIEW-ONLY MODE

1. Click on the Options menu on the CONNECTIONS Toolbar and select the View Agency Access command.

ACCESSING THE AGENCY ACCESS WINDOW IN UPDATE MODE

1. Click on the Maintain menu on the CONNECTIONS Toolbar and select the Agency Access command. The Agency Access window displays in modify mode. If agency access has not yet been established, the following message displays:
   "Agency Access information has not yet been entered."

2. Click on the OK button in response to the message. The default setting for all staff groupings on the Agency Access window is None.

3. To change the agency access setting for a specific staff grouping, click on its corresponding View, Maintain or None radio button, as appropriate.

If two workers access the Agency Access window in modify mode for the same district/agency at the same time, only the first worker who saves the changes will be allowed to do so. If the second worker attempts to save changes after the first worker has done so, the following message displays: *"Save Failed: Data has been modified by another user. Exit and try again."*

Click on the OK button to close the message.

The default agency access is established based on the business rules, which are reflected in the Agency Access Options Matrix on the next page.

The following conditions apply to the Agency Access window:

- For each of the options, only one (View, Maintain or None) may be selected.
- There are no system edits necessary among the choices for the three sets of options, because each one encompasses a different set of staff.
- If the district/agency has not yet opened the Agency Access window in modify mode and saved the information, the default is None for all choices.
- The access granted via the Agency Access window does *not* remove access granted in other ways. The options on this window only add access to that which is granted in other ways, they will never remove access.
- Agency Access does not apply to Pre build 18 stages, which include CPS, FAD and ARI.

New York State Office of Children and Family Services

AGENCY ACCESS OPTIONS MATRIX

(E = Options Enabled D = Option Disabled)
(Highlighted items indicate what is selected or enabled.)

Case Assignable Staff

	View	**Maintain**	**None**
All Within District/Agency	Selected		
All Within Unit	D	E	D
All Within Same Job Type	D	E	D

When **View** is selected for the **All Within District/Agency** staff grouping, only the **Maintain** radio button is enabled for the **All Within Unit** and **All Within Same Job Type** staff groupings. If no radio button is selected for either of these staff groupings, the default access is **View**, since that was selected for all workers within that district/agency.

	View	**Maintain**	**None**
All Within District/Agency		Selected	
All Within Unit	D	D	D
All Within Same Job Type	D	D	D

When **Maintain** is selected for the **All Within District/Agency** staff grouping, *all* radio buttons disable for the **All Within Unit** and **All Within Same Job Type** staff groupings, since the broadest level of agency access has already been established for all worker within that district/ agency.

	View	**Maintain**	**None**
All Within District/Agency			Selected
All Within Unit	E	E	E
All Within Same Job Type	E	E	E

When **None** is selected for the **All Within District** staff grouping, all radio buttons enable for the **All Within Unit** and **All Within Same Job Type** staff groupings. If no radio button is selected for either of these staff groupings, the default access is **None**, since that was selected for all workers within that district/agency.

Unit Approver

	View	**Maintain**	**None**
All Within District	Selected		
All Within Same Unit Spec.	D	E	D

When **View** is selected for the **All Within District** staff grouping, only the **Maintain** radio button enables for the **All Within Same Unit Spec** staff grouping. If no radio button is selected for this staff grouping, the default access is **View**, since that was selected for all workers within that district/agency.

	View	Maintain	None
All Within District/Agency		Selected	
All Within Same Unit Spec.	D	D	D

When **Maintain** is selected for the **All Within District** staff grouping, *all* radio buttons disable for the **All Within Same Unit Spec** staff grouping, since the broadest level of agency access has already been established for all workers within that district/agency.

	View	Maintain	None
All Within District/Agency			Selected
All Within Same Unit Spec.	E	E	E

When **None** is selected for the **All Within District** staff grouping, *all* radio buttons enable for the **All Within Same Unit Spec** staff grouping. If no radio button is selected for this staff grouping, the default access is **None**, since that was selected for all workers within that district/agency.

Direct Supervisory Line

	View	Maintain	None
All Staff	Selected		
All Non-Clerical Staff	D	E	D

When **View** is selected for the **All Staff** grouping, only the **Maintain** radio button enables for the **All Non-Clerical Staff** grouping. If no radio button is selected for this staff grouping, the default access is **View**, since that was selected for all workers within that district/agency.

	View	Maintain	None
All Staff		Selected	
All Non-Clerical Staff	D	D	D

When **Maintain** is selected fore the **All Staff** grouping, *all* radio buttons disable for the **All Non-Clerical Staff** grouping, since the broadest level of agency access has already been established for all workers within that district/agency.

	View	Maintain	None
All Staff			Selected
All Non-Clerical Staff	E	E	E

When **None** is selected for the **All Staff** grouping, *all* radio buttons enable for the **All Non-Clerical Staff** grouping. If no radio button is selected for this staff grouping, the default access is **None**, since that was selected for all workers within that district/agency.

ORGANIZATIONAL HIERARCHY WINDOW

Local districts and voluntary agencies can establish an organizational hierarchy in CONNECTIONS that best represents their own organizational structure. The Organizational Hierarchy window provides an organizational chart of a district/agency and its corresponding units. Workers with the proper security can view and/or modify access to their own district/ agency. Changing a unit's position within the organizational hierarchy of the district/agency can grant implicit security access rights to individuals at higher management levels. Anyone in a direct supervisory line above a worker with a role in the case can be given access to that case, if the district/agency chooses to authorize such access.

When the Organizational Hierarchy window opens, CONNECTIONS automatically searches for and retrieves the following information to build the organizational hierarchy for the district/ agency:

- Unit Number, Unit Specialization, In-/Out-Assignment data, Unit Approver and Supervisory Unit (from the Unit Detail window)

- Employee Name and Employee Role (from the Staff Detail window)

The Organizational Hierarchy window contains a tree-view list that displays the organizational hierarchy for the specified district/agency. This tree-view list has the look and feel of Windows Explorer, providing a familiar environment for maintaining the Organizational Hierarchy of the units within a district/agency. When this window opens, the following information is pre-filled by the system:

- User's District/Agency

- User's Office Type

- Tree-view displaying the district/agency and units in a hierarchical display

All units in the district/agency display on the left side of the window. By default, units display directly under the root (district/agency). Once a unit is moved, it displays where it has been inserted. Each unit is listed under its supervisory unit. Each unit is displayed with a name that is composed of the Site ID, Unit number and Unit Specialization.

> For example:
> If a unit has a Unit Number labeled "VAB" and a Unit Specialization labeled "Administration" in site "1Q2", this unit will display as [1Q2] VAB-Administration.

The Organizational Hierarchy window contains two fields at the top of the window:

District/Agency	The code of the worker's own district/agency (e.g., "A15" for Essex County DSS, "A31" for Onondaga County).
Office Type	The district/agency's office type (e.g., "District" for LDSS offices, "Vol Agen" for Voluntary Agencies).

Below these fields are two lists: the tree-view list on the left side of the window and the detail list on the right side.

The organizational hierarchy's tree-view list contains three components:

- The root is the district/agency itself.
- Supervisory units contain one or more units. A Supervisory unit is identified by a plus sign (+) to the left of its name in the tree-view list; when a worker clicks on the plus sign, the units under that supervisory unit display below the supervisory unit on the Organizational Hierarchy window.
- Units are the lowest level hierarchical components. They are often under supervisory units, but can exist directly under the root.

When a worker selects a unit, a detail list displays on the right side of the window, listing the names of the employees in that unit, each employee's In-/Out-Assignments and each employee's role within that unit. If an employee is the Unit Approver, this notation displays in parentheses following the employee's role. To make the list of employees easier to read, the list displays with alternately highlighted row. Workers will only be able to view/modify the organizational hierarchy of their own district/agency.

Organizational Hierarchy Report

An Organizational Hierarchy report that illustrates how your district or agency organizational hierarchy is set up is available in the OCFS Data Warehouse.

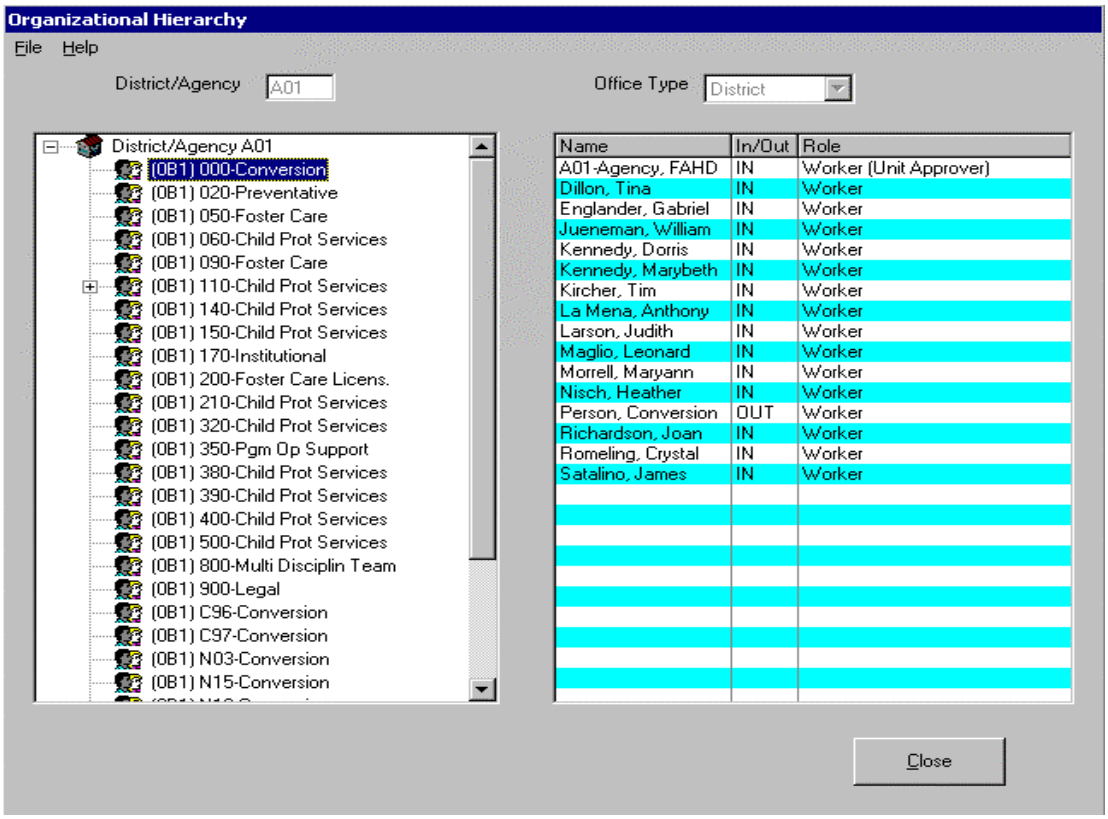
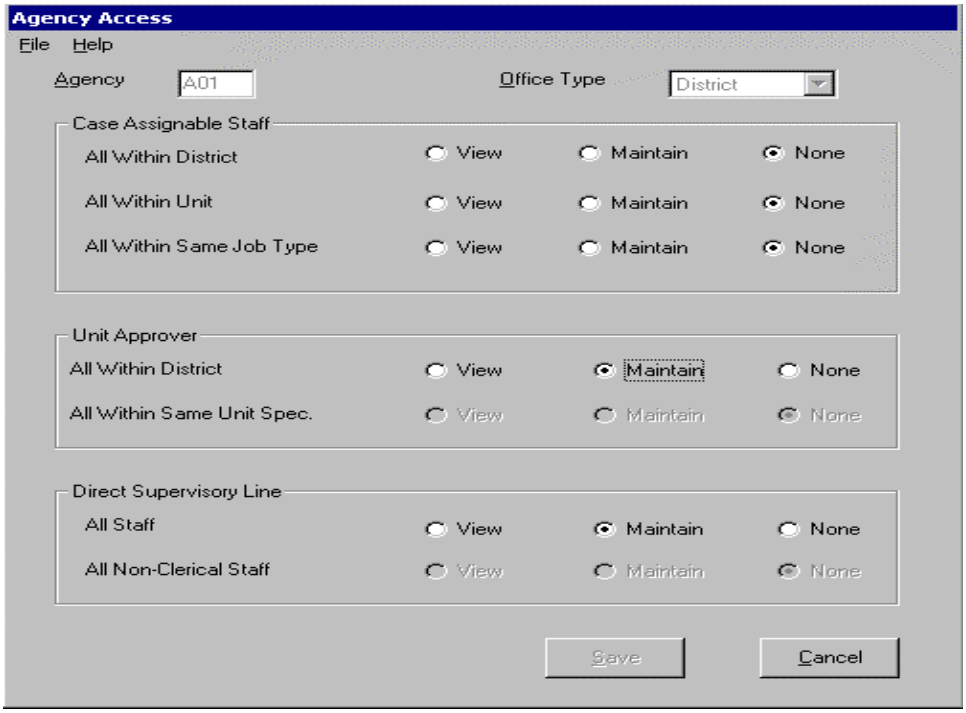
Accessing The Organizational Hierarchy Window In View-Only Mode

1. Click on the Options menu on the CONNECTIONS Toolbar.
2. Select the View Org. Hierarchy command.
    a. The Organizational Hierarchy window opens in view-only mode.

Accessing The Organizational Hierarchy Window In Modify Mode

1. Click on the Maintain menu on the CONNECTIONS Toolbar.
2. Select the Org. Hierarchy command.
    a. The Organizational Hierarchy window opens in modify-mode.

ORGANIZATIONAL HIERARCHY WINDOW



AGENCY ACCESS WINDOW