



CONNECTIONS Security Tip Sheet

Removing a Worker from CONNECTIONS

Revised May 2021

Just as adding a user to CONNECTIONS is a multiple step, multi-system process, removing a user from CONNECTIONS also involves steps in both the CONNECTIONS and the Active Roles Administration (ARS) systems. It requires coordinated efforts between the worker's supervisor, the CONNECTIONS Security Coordinator and the Local Security Administrator (LSA). This tip sheet outlines the basic steps necessary to remove a worker's account in CONNECTIONS. See the ARS manual for the additional steps to deprovision the account in ARS.



Security Reminder: Because many workers now access CONNECTIONS remotely, it is essential that their access to the protected and confidential information contained in CONNECTIONS be revoked as soon as possible when a worker leaves the position requiring access.

Locking a worker's account will immediately remove access while preserving their CONNECTIONS account and their email account for additional actions. Accounts can be locked by attempting to log on with an incorrect password three (3) times or by using the Lock Account functionality in ARS.

Preparing to End-date a User in CONNECTIONS

The process of removing a user account consists of two steps; end-dating the worker in CONNECTIONS and, if they will no longer need an Active Directory account, deprovisioning their account in the ARS system.

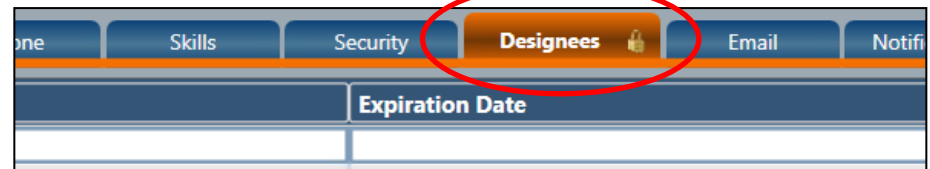
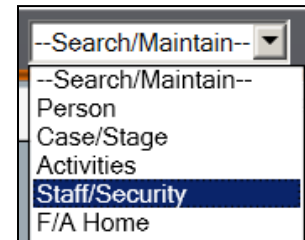
Before a worker can be end-dated in CONNECTIONS, the following conditions must be met:

- ✓ Their workload must be empty.

- ✓ All To-Dos must have been completed, transferred or deleted.
- ✓ Any uploaded documents or photos in the My Uploads tab must be filed or deleted.
- ✓ If the worker is a Unit Approver, their Unit Approver status must be re-assigned to another worker.

Reminder: If others gain access in CONNECTIONS by being a Designee of that worker, that access will be lost when the person is end-dated. To avoid this:

1. Select Staff/Security from the Search/Maintain drop-down menu.
2. Do a search for the staff person to be end-dated.
3. Select the Designees tab.



4. Any designees, with the date their designee status expires, will be listed in the grid in view-only mode.

5. Assign other access to these workers as needed.

Reassigning and Unassigning Workload Stages

These steps must be done by a person with access to the worker's workload - typically the worker's Supervisor.

To Reassign Stages to Another Worker's Workload:

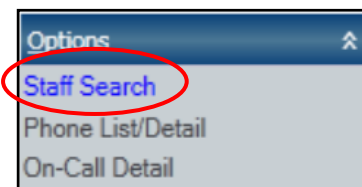
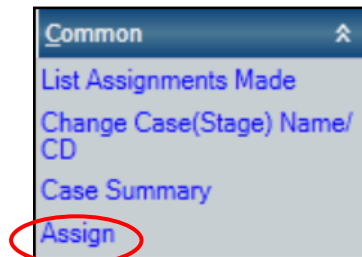
1. Navigate to the workload of the assigned worker.
2. Check the checkbox next to the stage(s) you wish to reassign. To select multiple stages, click the checkboxes of each desired stage.

<input type="checkbox"/>	New	!	Stage Name ▲	Stage	Type	Role
<input checked="" type="checkbox"/>			Antonio, Maria	INV	INI	PR
<input checked="" type="checkbox"/>			Antonio, Maria	INV	SUB	PR
<input checked="" type="checkbox"/>			Collins, Kristy	INV	INI	PR

Note: You may only multi-assign to the **same role** (e.g., Primary, CW) and the **same type of stage** (e.g., CWS, ADPVO, FAR).

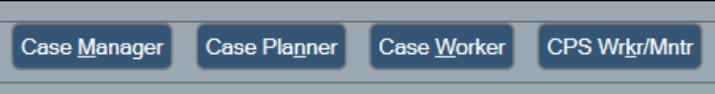
For INV stages, only Primary roles can be reassigned as multiples.

3. Click the **Assign** link in the left navigation pane.
4. On the Assign window, you may either select a staff person in the Available Staff grid or use the **Staff Search** link in the left navigation pane to add a staff person to the grid of assignable staff.



Reminder: Only staff marked as Case Assignable will display on the Assignable Staff Grid.

5. With the name of the staff person to receive the assignment highlighted, click on the button that corresponds to the role you wish them to have.



That person will be added to the Assignments grid in the lower part of the window.



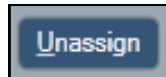
6. Click the **Save** or **Save & Close** button.

Since there can be only one Primary worker, Case Manager or Case Planner at a time, assigning a worker to one of these roles will automatically unassign the current worker.

For the roles of Case Worker, CPS Worker Monitor or Secondary or for the elimination of the Case Planner role, follow the steps below to unassign the current worker:

To Unassign Stages:

1. Navigate to the workload of the assigned worker.
2. Select the stage you wish to unassign.
3. Click the **Assign** link in the left navigation pane.
4. In the Assign window, highlight the current worker's name in the Assignments grid.
5. Click the **Unassign** button to the lower left of the Assignments grid.
6. Click the **Save** or **Save & Close** button to save the changes.




Note: The last remaining role in a stage (i.e., Case Manager or Primary) cannot be unassigned. *The stage must be closed to remove the last worker.* If a stage is to remain open, it must be

assigned to another worker before the worker you wish to end-date can be unassigned.

Clearing To-Dos

If a worker has not cleared their To-Dos before leaving, these steps would be done by a person with access to them - typically the worker's Supervisor.

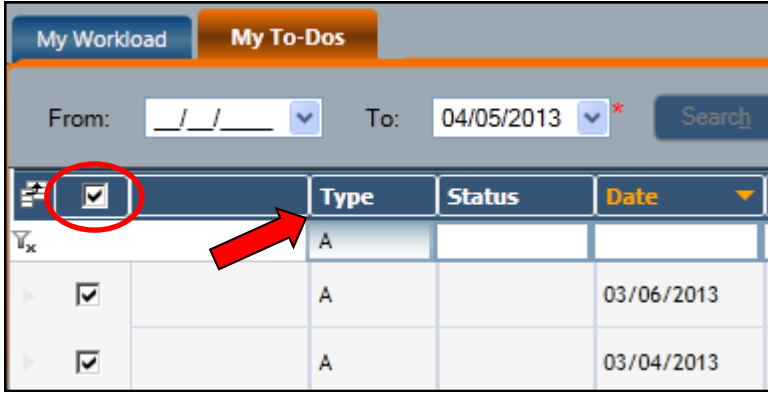
- Alert (A) and Reminder (R) To-Dos may be deleted if no longer needed.
- Task (T) To-Dos must either be completed, have a completion date entered or be reassigned to another worker.

 **Hint:** The process of unassigning stages from a workload creates Alert To-Dos, so it is most efficient to reassign the worker's workload before deleting their To-Dos.

Deleting Alert or Reminder To-Dos:

1. Navigate to the worker's To-Do Tab.
2. Check the checkbox(es) of the To-Do(s) you wish to delete.

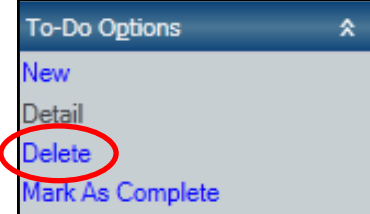
Filter Bar {



	Type	Status	Date
<input checked="" type="checkbox"/>	A		
<input checked="" type="checkbox"/>	A		03/06/2013
<input checked="" type="checkbox"/>	A		03/04/2013



Hint: For Alerts or Reminders, use the filter bar to display one type of To-Do, then use the checkbox in the header row to select all of these To-Dos at once.



3. Click the **Delete** link in the navigation pane to delete all the selected To-Dos.

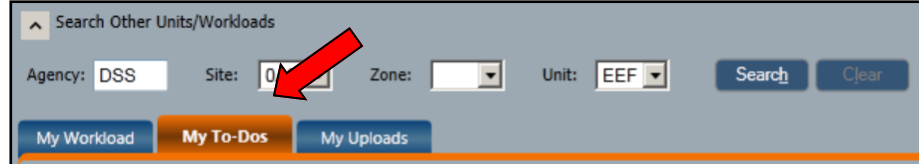


Task to-Dos can only be reassigned by the Unit Approver of the worker's unit, typically, their Supervisor.

If a To-Do in REJT status is for an open stage n which your voluntary agency is longer assigned a role, it should be reassigned to the LDSS Case Manager.

Reassigning a Task To-Do:

1. Use the Unit Summary (Search Other Units/Workloads) path to navigate to the worker's To-Do Tab.



2. Highlight the To-Do you wish to reassign.
3. Click the **Detail** link in the left navigation pane.
4. In the left navigation pane of the To-Do Detail window, click the **Staff Search** link.



4. Enter your search criteria and click the **Search** button.
5. From the resulting Staff List, select the person to whom the To-Do will be assigned.
6. Click the **OK** button to the lower right of the Staff List.
7. Click the **Save & Close** button on the To-Do Detail window.

Marking Progress Note Task To-Dos as Complete:

Task To-Dos created with a Task Type of *Progress Note* cannot be deleted by use of the Delete link. To remove them, a completion date must be entered in the Task Detail window:

1. Navigate to the worker's To-Do Tab.
2. Select the Progress Note Task To-Do.
3. Click the **Detail** link in the left navigation pane.
4. Enter a date in the Completed field.

The screenshot shows the 'To-Do Detail' window. The 'Completed' field is highlighted with a red circle. The 'Assigned To' field shows 'Wilson33,Darryl'. The 'Task Description' is 'Progress Note - 27500374'.

5. Click the **Save & Close** button.

Reassigning Unit Approver Status

This step requires the Maintain Unit business function and is typically done by the Security Coordinator.



You must remove the Unit Approver designation from the current Approver before you can designate another worker in the unit as the Unit Approver.

1. Select **Unit** from the Search/Maintain drop-down menu.
2. On the Unit Search window, click the **Search** button to display all units for your agency.

The screenshot shows a drop-down menu with the following options: --Search/Maintain--, --Search/Maintain-- Person, Case/Stage, Activities, Staff/Security, F/A Home, Resource, Office, and Unit. The 'Unit' option is highlighted in blue.

Hint: You can narrow the search criteria by entering a Site, Zone (usually used in NYC) and/or Unit name before clicking the Search button.

3. In the Unit List grid, select the correct unit.

The Detail tab opens, displaying the workers assigned to that unit.



Navigation Hint: You can click on the white circle to temporarily collapse the Unit List grid.

The screenshot shows a 'Unit List' grid with a 'Unit' button. A white circle icon with a blue arrow is highlighted with a red circle.

4. Select the current Unit Approver (indicated by the "Y" in the UA column).

The screenshot shows the 'Member Information' window. It contains a table with columns 'UA', 'Name', and 'Role'. The first row has 'Y' in the UA column, 'May1,Sally' in the Name column, and 'Supervisor' in the Role column. Below the table, there are fields for 'Role' (Supervisor), 'In/Out' (IN), and a checked 'Unit Approver' checkbox, which is highlighted with a red circle.

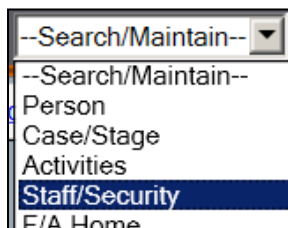
UA	Name	Role
Y	May1,Sally	Supervisor


5. Uncheck the Unit Approver checkbox.
6. Click the **Modify** button.
7. Select the name of the worker who will be the new Unit Approver from the Member Information grid.
8. Check the Unit Approver checkbox.
9. Click the **Modify** button.
10. Click the **Save & Close** button.

End-dating a Person in CONNECTIONS

This step requires the Maintain Staff business function and is typically done by the Security Coordinator.

1. Select **Staff/Security** on the Search/Maintain drop-down menu.
2. In the Staff Search Criteria window, enter the name or Person ID of the worker to be end dated.



 **Hint:** You can narrow your search results by typing only the first few letters of the worker's last name. The results will include only those staff in your district/agency whose last name begins with those letters.

Clicking the Search button without entering a name or ID will return all staff in your district/agency.

3. Click the **Search** button.
4. From the Staff List, select the worker to be end-dated.
5. On the **Detail** tab, enter the date in the End Date field.

Either the current or a past date can be entered. You cannot enter a future date in anticipation of a worker no longer needing access..

 A screenshot of a software interface showing a "Detail" tab. The tab is divided into three sections: "Personal", "Address", and "Phone". Under the "Personal" section, there are fields for "First:" (containing "Samuel"), "End Date:" (with a date picker set to a blank date), and "CCRS ID:". A red circle highlights the "End Date:" field.

6. Click the **Save & Close** or **Save** button.

Additional Considerations

Workers may be assigned other CONNECTIONS-related responsibilities that must be reassigned before they are end-dated. These include roles such as:

- Security Coordinator
- Back-Up Security Coordinator
- Implementation Coordinator
- Back-Up Implementation Coordinator
- Data Warehouse Coordinator
- DAP Security Person

For Security Coordinators and their Back-Ups, the following business functions must be assigned to a new Security Coordinator or Back-Up **before** the account for the current worker is end-dated:

- MAINT SECURITY
- MAINTAIN OFFICE
- MAINTAIN UNIT
- MAINTAIN STAFF

- MAINT AGY ACC (Maintain Agency Access)*
- MAINT ORG HIER (Maintain Organizational Hierarchy)*

These last two business functions (MAINT AGY ACC and MAINT ORG HIER) can only be assigned or unassigned by OCFS Home Office staff.

To request the addition or removal of these functions, the agency's Commissioner, Director of Services, Executive Director or other executive level staff person must complete the *CONNECTIONS Security Coordinator Update and Security Business Functions Request Form* and email it to **CONNECTIONSi@ocfs.ny.gov**. This form, which is also used to record changes in Security Coordinators, can be found on the Forms page of the CONNECTIONS internet

Reminder: When the roles of Security Coordinator, Implementation Coordinator or their Back-Ups change, this information must also be updated in the District-Agency Profile (DAP) so that relevant email distribution lists are updated.



If you need assistance updating the DAP, please contact your CONNECTIONS Regional Implementation Staff member.

For additional information on the District Agency Profile (DAP), please see the District Agency Profile Tip Sheet .

RSA Tokens

If the worker was assigned an RSA hard token to access CONNECTIONS, remember that the token should be reclaimed and returned to NYS ITS. Please contact your CONNECTIONS Regional Implementation Staff member if you have questions.

Resources

- CONNECTIONS Job Aids and Tip Sheets: See the Helpful Info tab in CONNECTIONS or <http://ocfs.state.nyenet/connect/jobaides/jobaides.asp>
- CONNECTIONS Regional Implementation Staff:
<http://ocfs.state.nyenet/connect/contact.asp>
- CONNECTIONS Application Help Mailbox:
ocfs.sm.conn_app@ocfs.state.ny.us
(NOTE: address contains an underline)
A Helpdesk ticket is now required to submit a request to the App-Help mailbox.

ITS Enterprise Service Desk
1-844-891-1786