CONNECTIONS Tip Sheet

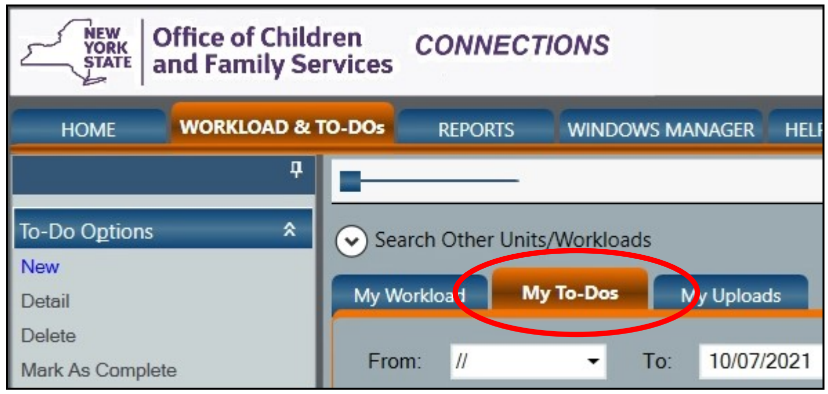
Using Reminder To-Dos to Share Confidential Information

September 2021

Email systems do not provide sufficient security to preserve the confidentiality of information. When confidential case or 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, even one at another district or agency, to securely convey confidential information much more securely than using email. This tip sheet is for any CONNECTIONS user that needs to create and manage Reminder To-Dos.

The My To-Dos Tab

To-Dos are located on the My To-Dos tab, which is accessed from the WORKLOAD & TO-DOs tab on the main CONNECTIONS window.

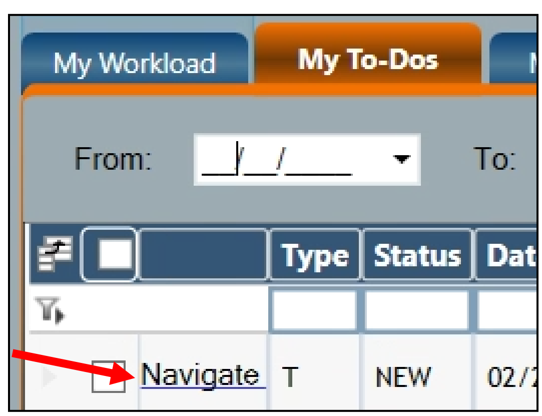


Types of To-Dos

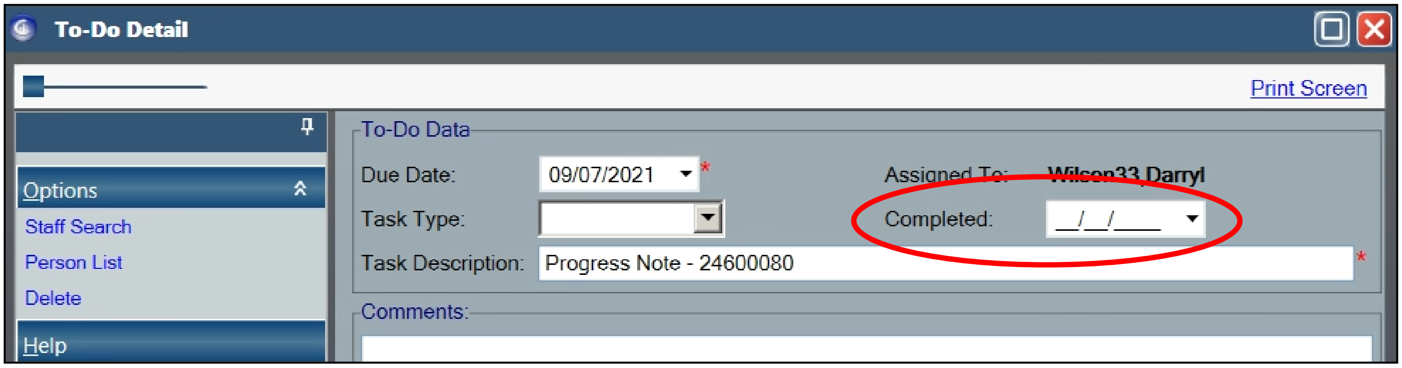
There are three types of To-Dos available in CONNECTIONS.

- **Reminder To-Dos** (denoted by the letter "R") 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** (denoted by the letter "A") are system-created notifications 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** (denoted by the letter "T") 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 by using the **Navigate** link and completing the task.



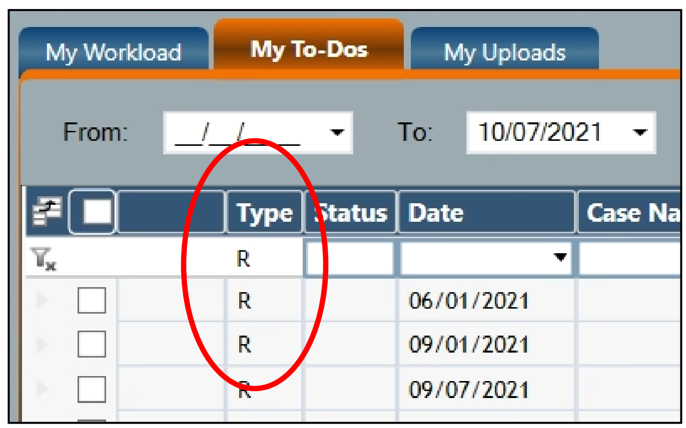
User-generated Task To-Dos, such as Progress Note To-Dos, must have a completion date entered on the Task To-Do Detail window in order for them to be removed from your To-Do list.



Managing To-Dos

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

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



<u>Hint:</u> 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 schedule::

Type of Stage	To-Do Displayed for
INT, INV, ARI and To-Dos not associated with a Stage	30 days
FSI, FSS To-Dos	90 days
FAD To-Dos	180 days

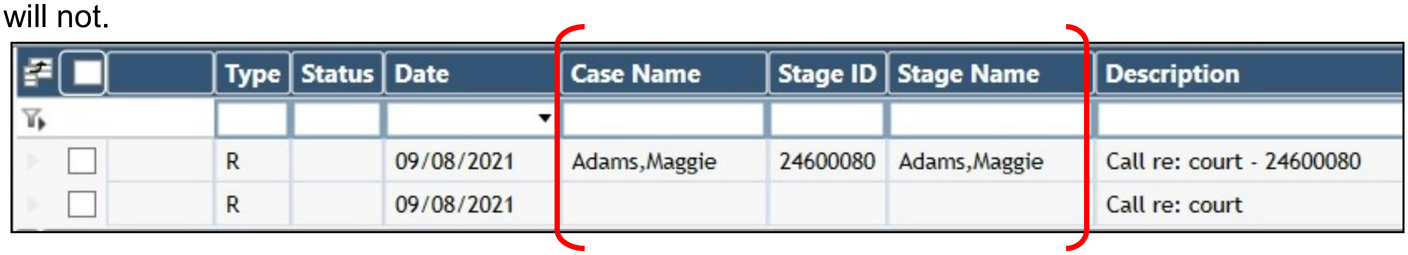
Navigable Task and Approval To-Dos cannot be deleted; they remain on the To-Do list until the associated task is completed.

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 since information remains confined within the CONNECTIONS system. There are two paths by which to create a Reminder To-Do:

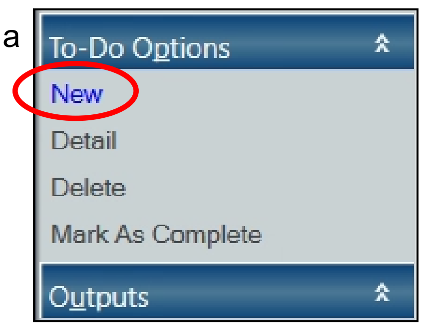
- from your Workload or
- from the My To-Do tab

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	Description
☐	R		09/08/2021	Adams,Maggie	24600080	Adams,Maggie	Call re: court - 24600080
☐	R		09/08/2021				Call re: court

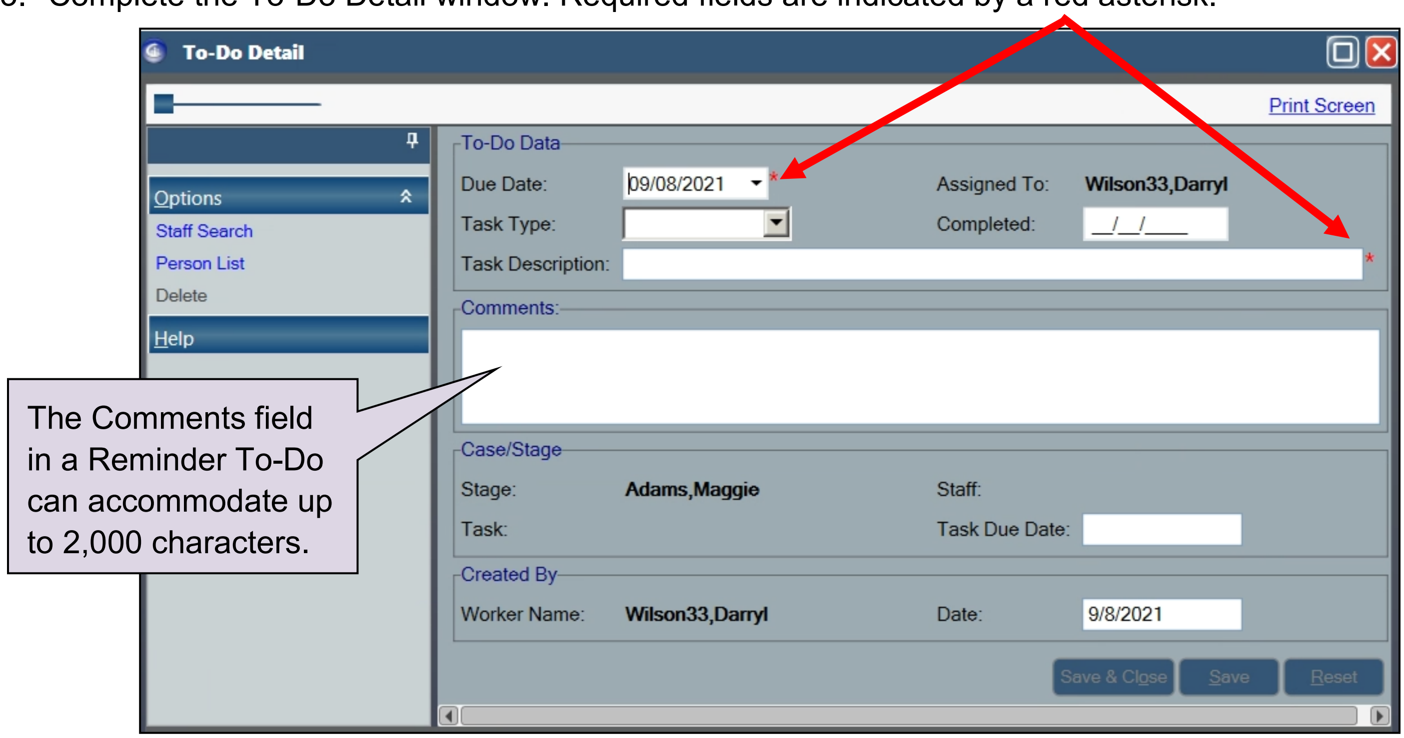
Step-by-Step, Creating a Reminder To-Do from the Workload



1. From your workload, select 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 To-Do Detail window opens.

   The selected case name will display on the To-Do Detail window.
3. Complete the To-Do Detail window. Required fields are indicated by a red asterisk.

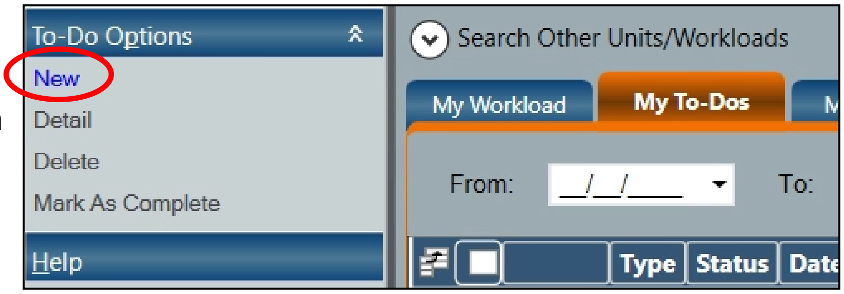


4. Click the Save or the **Save & Close** button.

Step-by-Step Creating a Reminder To-Do from the My To-Dos Tab

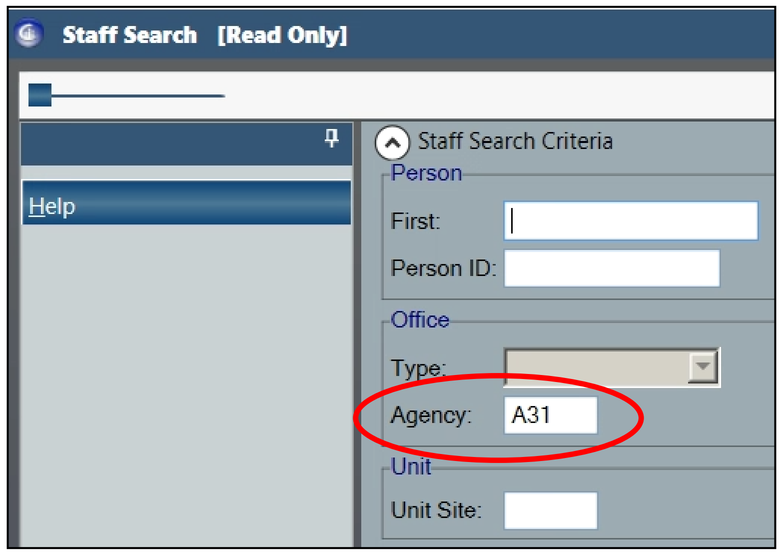
1. Select the **My To-Dos** tab.
2. Click the **New** link in the To-Do Options section of the left navigation pane.

   The To-Do Detail window opens.



3. Complete the To-Do Detail window.
4. By default, the Reminder To-Do will be assigned to the worker who created it. If you want the To -Do assigned to someone other than yourself, click the **Staff Search** link in the navigation pane.

   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.



5. Select the desired person from the Staff Search results and click the **OK** button.

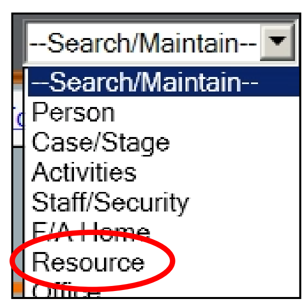
   You are returned to the To-Do Detail window.

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

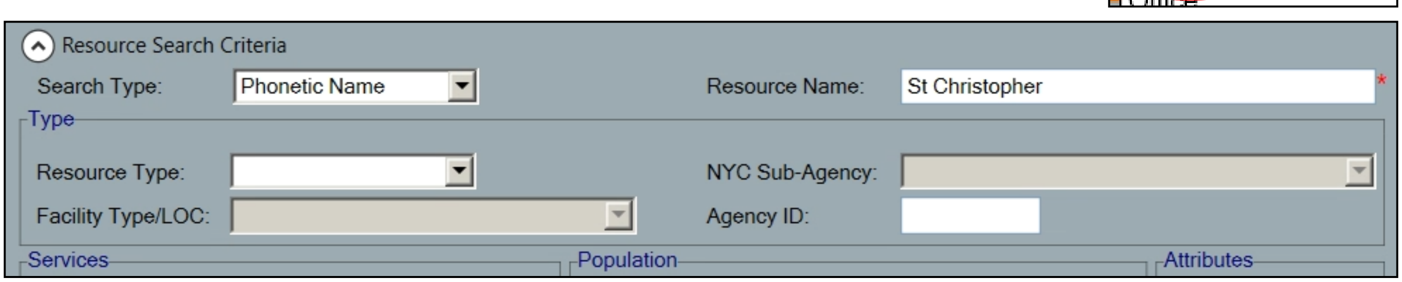
Finding an Agency Code

Don't know the Agency Code of a worker you want to create a Reminder To-Do for?

You can find it in CONNECTIONS by searching the Resource directory.

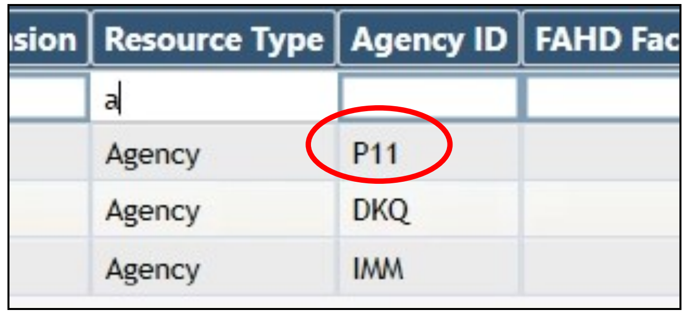


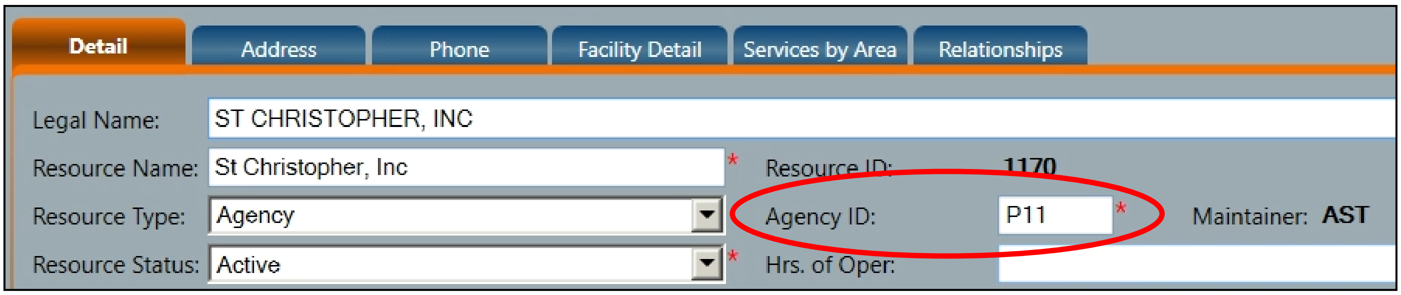
1. Select **Resource** from the Search/Maintain menu.
2. Enter the name of the district/agency in the "Resource Name" field and click the Search button.



3. Scroll over to the Type column and filter for "Agency" by typing the letter A in the filter bar.
4. The Agency Code can be found in the "Agency ID" column.

   Highlighting that line in the grid will open the Detail tab below the search results to verify you have selected the correct agency.





Resources

CONNECTIONS Job Aids and Tip Sheets are now available on the Helpful Info tab in CONNECTIONS

- CONNECTIONS Job Aids and Tip Sheets: 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.gov
  (NOTE: address contains an underline)

*A Helpdesk ticket is now required before sending requests to the Triage Unit. This can be acquired by emailing **FixIt@its.ny.gov**.*

ITS Enterprise Service Desk
1-844-891-1786