



# CONNECTIONS Security Tip Sheet

## Understanding Designees and Assignees

Revised September 2015

*In the regular course of business, the need may arise for one worker to cover the responsibilities of an absent colleague. When absences are planned and of defined duration - such as for a vacation or medical leave - the use of designees may be an effective security strategy to employ.*

### What is a Designee?

Assigning a designee allows one worker to “lend” their Business Function Profile to another CONNECTIONS user in their agency for a specified period of time. The person who temporarily shares their security rights with another is known as an **Assignee**; the worker to whom those rights are temporarily assigned is known as the **Designee**.

The type of access a worker has to lend depends only on the Business Functions they have been assigned and their role within a unit.

**Designees do not inherit access that is based on Agency Access or Organizational Hierarchy settings.**

### Who Needs a Designee?

The assignment of a Designee can be used to prevent an interruption in work flow when a worker will be absent for a period of time. Typical work flow needs might include:

- Acknowledgement of SCR reports at a local DSS office.
- The assignment of cases in the absence of the usual assigner.
- Approvals (Safety Assessments, Risk Assessments, FASPs, FAD licensing) to be done in the absence of the usual approver.
- Supervisory oversight of workers in the absence of the usual supervisor (reviewing Progress Notes, PHRs and To-Dos).
- Temporary coverage when a worker with a unique set of business

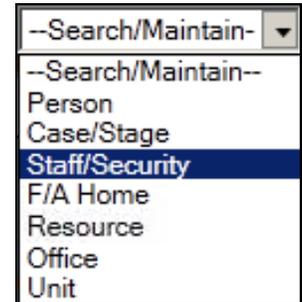
functions (e.g. the CONNECTIONS Security Coordinator or a worker with View Sealed Adoptions) will be absent.

### How Do I Know Who is a Designee or an Assignee?

All CONNECTIONS uses have the ability to search and view Assignee/Designee information.

#### To Search for the Designees of a Particular Worker:

1. Using the Search/Maintain drop-down menu, choose **Staff/Security**.



2. Enter the name of the worker.

You can narrow your search by entering Office or Unit information in the appropriate fields.

3. Click the **Search** button.

 **Navigation Hint:** Smaller districts and agencies may find it easier to just click the **Search** button to return all workers.

4. Highlight the worker’s name.
5. Click the **Designees** tab to display each of the worker’s designees (if any) and the date on which their designee status expires.

Detail	Address	Phone	Skills	Security	Designees
Employee Name					Expiration Date
May78, Sally					06/30/2014

### To Search for an Assignee:

(Staff to whom the worker is a designee):

1. Using the Search/Maintain drop-down menu, choose **Staff/Security**.

2. Enter the name of the worker.

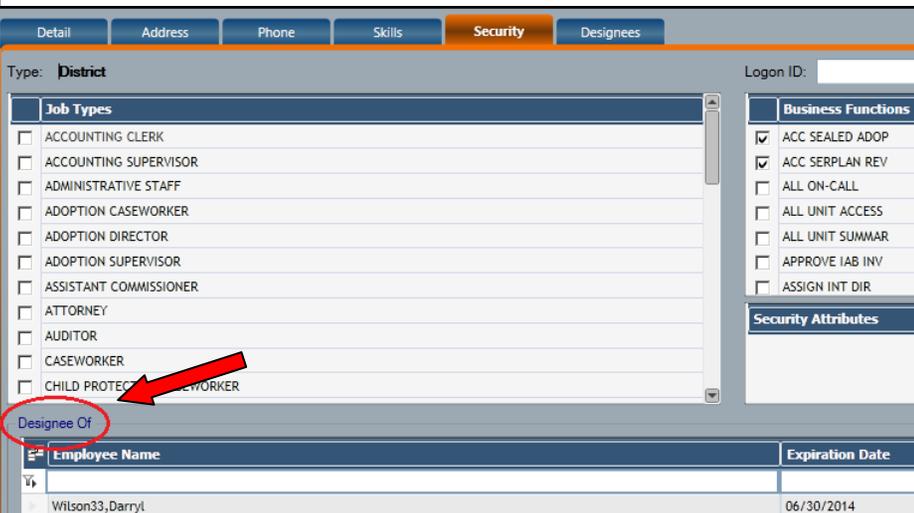
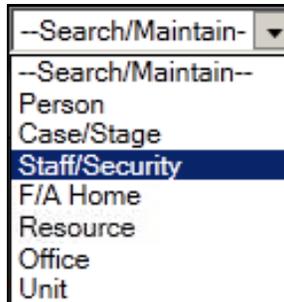
You can narrow your search by entering Office or Unit information in the appropriate fields.

3. Click the **Search** button.

 **Navigation Hint:** Smaller districts and agencies may find it easier to just click the **Search** button to return all workers.

4. Highlight the worker's name.

5. Click the **Security** tab to display each of the worker's assignees (person to whom they are a designee) and the date on which the designee status expires.



 **The Assignee Designee Report**, available through the Data Warehouse, lists all the Designees and Assignees in your organization. This pre-formatted report is located in the Security folder and is updated weekly.

Once in the Data Warehouse, the path is:

[Cognos](#) > [Public Folders](#) > [Global Reports](#) > [OCFS](#) > [OCFS Data Warehouse](#) > [Security](#) 

**NOTE:** You must have permission to access reports in the Data Warehouse. See the Data Warehouse page on the CONNECTIONS Internet site for information about how to gain access:

<http://www.ocfs.state.ny.us/connect/datawarehouse/dwaccess.asp>

### **How Do I Make Someone a Designee?**

In order to assign a designee, a worker must have the **MAINT DESIGNEEES** business function. This function may be:

- assigned directly to a worker as an individual business function,
- assigned as part of the CPS SUPERVISOR or CPS SUP LIMITED bundles, or
- “inherited” if the worker becomes a designee of someone who already has the business function.



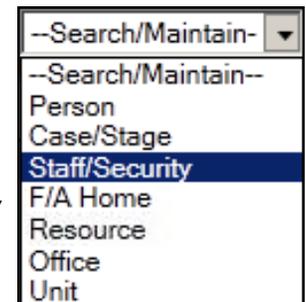
A worker with the **MAINT DESIGNEEES** function can only manage designees for their own account.

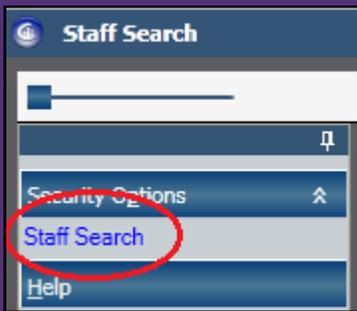
*Security Coordinators (those with the MAINT SECURITY function) may manage designees/assignees for anyone in their organization.*

### To Make Someone Your Designee:

(Requires the **MAINT DESIGNEEES** business function.)

1. Using the Search/Maintain drop-down menu, choose **Staff/Security**.
2. Enter your name and click the **Search** button.
3. Highlight your name and click the **Security** tab.





4. Click the *Staff Search* link in the left navigation pane of the Staff Search [Read Only] window.
5. Enter the name of the desired Designee (the worker to whom you will be “lending” your access).
6. Click the **Search** button.

7. Highlight the desired worker’s name and click the **OK** button. This will fill the “Employee Name” field on the **Security** tab.
8. Scroll down and enter an Expiration Date.
9. Click the **Add** button.
10. Click the **Save** or **Save & Close** button.

**To Create a Designee Or Assignee For Someone Else:**

*(Requires the MAINT SECURITY business function.)*

1. Using the Search/Maintain drop-down menu, choose **Staff/Security**.
2. Enter the name of the worker who is to become the designee.  
You can narrow your search, if desired, by entering Office or Unit information in the appropriate fields.
3. Click the **Search** button.
4. Highlight the desired worker’s name.
5. Click the **Security** tab.



**HINT:** Do not go to the *Designees* tab – this is a read-only tab that displays designees that have already been assigned; you cannot add designees for others on this tab.

6. Click the *Staff Search* link in the left navigation pane of the Staff Search [Read Only] window.
7. Enter the name of the desired Assignee (the worker who be “lending” their access to the designee).
8. Click the **Search** button.
9. Highlight the desired worker’s name and click the **OK** button. This will fill the “Employee Name” field on the **Security** tab.
10. Scroll down and enter an Expiration Date.
11. Click the **Add** button.
12. Click the **Save** or **Save & Close** button.

**Helpful Hints & Reminders**

- The Assignee/Designee feature is designed to provide time limited access to specific workers for targeted coverage of work duties during the absence of a colleague. If long term access is needed, it is preferable to use business functions, unit role, Agency Access or Organizational Hierarchy as these do not expire. Your Regional CONNECTIONS Implementation Team can provide information on the most appropriate security options for your agency.
- Setting designee expiration dates to fall during holiday periods (e.g.: December 31<sup>st</sup>) can have pitfalls. Workers may find they can’t access information that they could only a day or two before - and may not be able to quickly have needed access reinstated.
- Designee assignments can be deleted before their expiration date by navigating to the Security tab, highlighting the designee’s name, clicking the **Delete** button, then the **Save** button.
- Designees inherit ALL the business function access possessed by their Assignee. Workers with high power business functions and wide access across units should use caution when granting designee status so as to not unduly compromise the security of confi-

dential information. *Workers should only be granted the ability to access information for which they have a legitimate business need.*

- Designee assignments do not cascade. If worker A is the designee of worker B who is the designee of worker C, Worker A does not inherit worker C's access.
- A worker can be the designee of no more than 5 people at a time.

## Resources

- CONNECTIONS Job Aids and Tip Sheets:

<http://ocfs.state.nyenet/connect/jobaided/jobaided.asp>

- CONNECTIONS Regional Implementation Staff:

<http://ocfs.state.nyenet/connect/contact.asp>

- CONNECTIONS Application Help Mailbox:

[ocfs.sm.conn\\_app@ocfs.state.ny.us](mailto:ocfs.sm.conn_app@ocfs.state.ny.us)

*(NOTE: address contains an underline)*

- CONNECTIONS Communications Mailbox:

[connections@ocfs.ny.gov](mailto:connections@ocfs.ny.gov)

ITS Enterprise Service Desk  
1-800-697-1323