



CONNECTIONS Tip Sheet

Implied Role/Cross District Access

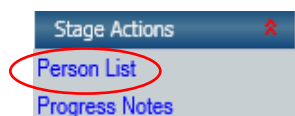
rev June 2011

If a stage on your workload shares a person in common (has the same PID) with another stage, open or closed, in any district or agency, you have an **implied** role in the related stage. With an implied role you have view-only access to the information in the related stage. Best casework practice requires that you review all information documented in each stage of a case in which you have a role, including those in which you have an implied role. In addition, the names of other involved worker(s) on the stage can be obtained; allowing you to follow-up directly with them.

Viewing a stage in which you have an Implied Role

1. On your workload, highlight the appropriate stage and click on the **Person List** link in the **Stage Actions** section of the **NAVIGATION PANE**.

The Person List window displays.



(FSS NAV PANE Example)

2. On the *Person List*, highlight the person in common.

The sub-tab section of the window displays.

3. Click on the **Case List** sub-tab. *The Case List displays.*

Person List - Collins, Kristy - S:27200823/C:37200220

Name	M/S	Sch	DOB	Approx	Sex	T
Collins, Kristy		V	02/19/1979		F	PF
Collins, Kimberly		V	08/16/2002		F	PF
Collins, Patrick		V	04/22/1994		M	PF
Collins, Thomas		V	11/24/1970		M	PF
Collins, Tyler		V	03/30/2009		M	PF

Person Info Person Merge/Split **Case List**

Case List

Image	Merge	Status	Case Name	Case ID	Dist/Agcy
		OPN	Collins, Kristy	37200220	ONONDAGA

4. On the Case List, click on the case you want to review
The sub-tab section displays.
5. Click on the **Case Summary** sub-tab. *The list of opened and closed stages for the case displays.*
6. Click on the stage you want to review.
7. Click on the **Stage Events** sub-tab.

Person List - Collins, Kristy - S:27201903/C:37200490

Case Summary Options

Case ID: 37200490 Case Manager: Wilson496, Darryl Dist/Agcy: 031

Status: Open Start Date of Case: 07/25/2009

Merge	Stage Name	Stage	Type	County	Zone	CD	PGM	Opened	Closed	SEC	Worker	Role	Phone	Stage ID	Stage Destruction Date
	Collins, Kristy	FSS	CWS	031			CPS	04/24/2009			Wilson496, Darryl	Case Manager		27201903	
	Collins, Kristy	FSS	CWS	031			CPS	04/24/2009	04/24/2009		Wilson475, Darryl	Histor. Case Worker		27201903	
	Collins, Kristy	INV	INI	031			CPS	04/24/2009			Wilson475, Darryl	Primary		27201903	
	Collins, Kristy	INT	INI	031			CPS	04/24/2009	04/24/2009		Wilson475, Darryl	Histor. Primary		27201903	

Count = 4

Assignments Stage To Dos **Stage Events**

From: To: Search refresh list

Event Date	TX Date	Status	Type	Description	Stage	Stage Name	Stage ID	Person	Entered By
06/25/2009	06/25/2009	COMP	Assignment	Case Worker Assignment Issued For: Wilson496, Darryl of Agcy: 031	FSS	Collins, Kristy	27201903	Wilson475, Darryl	Wilson475, Darryl
06/25/2009	06/25/2009	COMP	Approval	DIV - Approver INI FASP for F5 Stage Collins, Kristy - 27201903	FSS	Collins, Kristy	27201903	Wilson475, Darryl	Wilson475, Darryl

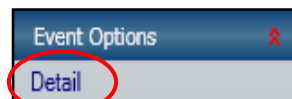
8. Click on the event from the list you want to review:
 - For a CPS Intake, select Record Call
 - For a CPS Investigation, select Child Protective Record Summary
 - For a FSI, select Record Family Services Intake
 - For a FSS, select Family Services Stage Opened

Note: Voluntary agency staff are not be able to view CPS Intake stages, unfounded CPS Investigation stages or any CPS Investigation stages that predate 1/1/06.

Note: For an FSS, the Early Intervention tab is the only Health Services information tha can be accessed via an implied role.

9. Click on the **Detail** link in **Events Options** section of the **NAVIGATION PANE**.

The corresponding window in the related stage will open, for example, the FSS:



Last Name	First Name	Middle Name	Suffix	Person Id	M/S	Sch	*DOB	Appox	Age
Collins	Kimberly			17203910	Y		02/19/1979	No	32
Collins	Kimberly			17203912	Y		08/16/2002	No	8
Collins	Patrick			17203912	Y		04/22/1984	No	17
Collins	Thomas			17203911	Y		11/04/1970	No	40
Collins	Tyle			17203914	Y		03/30/2009	No	2

10. Click on the **Close** button to close the accessed window and return to the *Person List* window.
11. Click the red **X** button at the top right of the *Person List* window to return to your workload.

Reminder: In all areas of CONNECTIONS, press F1 for help.

A Job Aid titled “Access to CPS Investigation via Implied Role” is located at:

http://ocfs.state.nyenet/connect/jobaides/Job%20Aid%2018%209%203%20Final_PDF.pdf

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)

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