



CONNECTIONS Tip Sheet

Adding a User to CONNECTIONS

Adding a user to CONNECTIONS is a multiple step process that requires (1) the establishment of a Human Services Enterprise Network (HSEN) account using the WebStar application, (2) the granting of access to the CONNECTIONS application (also in WebStar) and (3) the assignment of a unit and security business functions in CONNECTIONS. These steps are done by the Local Security Administrator (LSA) in WebStar and the Security Coordinator in CONNECTIONS. Both roles may/may not be assigned to the same district/agency staff person.

This Tip Sheet outlines the basic steps necessary in CONNECTIONS once the user account has been created and CONNECTIONS Application access granted in WebStar.

New Accounts in CONNECTIONS

Adding CONNECTIONS application access to a newly created user account in WebStar requires an overnight batch process. This means the new account will not appear in CONNECTIONS until the next day. New workers appear in CONNECTIONS assigned to a temporary "Conversion" unit, typically "N01".

Users cannot be assigned security or assigned a workload until they are moved from the conversion unit to a permanent unit.

If the user account has been created, but the worker does not appear in CONNECTIONS the following day, it's likely the Application Access step has been missed or did not run successfully. The Local Security Administrator (LSA) must go back into WebStar to add this access.

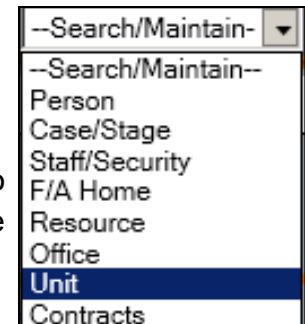
The steps to ready a new worker in CONNECTIONS are typically done by the organization's CONNECTIONS Security Coordinator, who is assigned the following business functions:

- Maintain Security
- Maintain Staff
- Maintain Unit

Step 1 - Move the Worker from the Conversion Unit

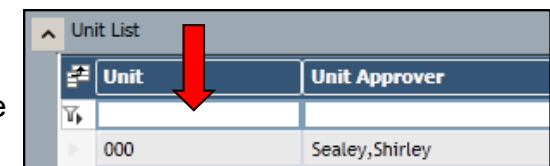
Note: The following steps assume you will be adding the worker to an existing unit. If a new unit must be created, please see the CONNECTIONS Tip Sheet, "Working with Units" for information on how to add a new unit.

1. Select **Unit** from the Search/Maintain drop-down menu.
The Unit Search window displays.
2. Enter the name of the unit and/or site to which the worker will be assigned in the appropriate fields and click the **Search** button.



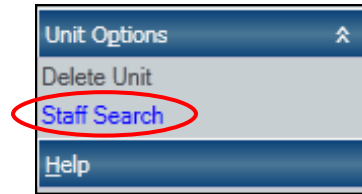
Navigation Hints: Smaller districts or agencies may find it easier to just click the **Search** button to return all units.

You can also use the filter bar to specify a particular unit from the search results



3. Select the unit to which the worker will be assigned.
*The **Detail** tab opens and displays all staff currently assigned to that unit.*

4. In the Unit Detail window, click the **Staff Search** link in the navigation pane.

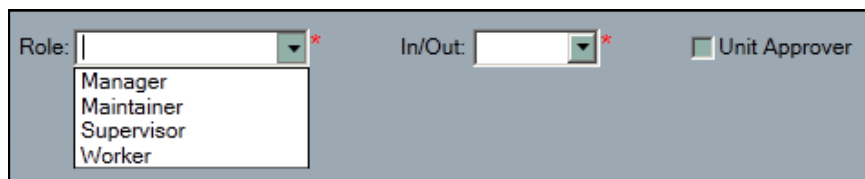


The Staff Search window displays with the Agency code prefilled.

5. Enter the last name of the worker to be added and click the **Search** button.
- If you wish to add multiple users to the same unit at once, leave the fields blank and click the **Search** button to return a list of all staff for your district/agency.
 - If your district/agency has more than one site, you can narrow your search by entering a site code, then clicking the **Search** button.
6. Highlight the name of the worker to be added to the unit - or check the checkboxes next to multiple names if you are adding more than one worker to the unit.
7. Click the **OK** button, at the lower right of the grid, to add the selected worker(s) to the unit and return to the unit widow.
8. With a worker highlighted, use the **Role** drop-down menu to select the role within the unit you wish to assign this worker.

Unit roles do not necessarily correspond with job titles!

Roles simply indicate the hierarchy of positions within a



particular unit. They are used in conjunction with the Unit Sum Access business function to grant access to workloads within the unit to the Unit Approver or those staff with roles higher than the Unit Approver, no matter what role they are assigned. From lowest to highest, the roles are:

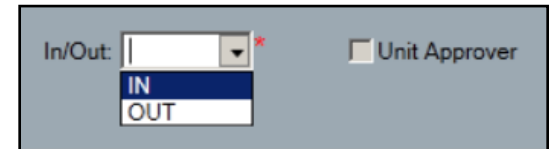
Worker < Supervisor < Maintainer < Manager.



NOTE - Some corrective actions in CONNECTIONS (e.g., Local Data maintenance on a closed investigation stage) require a specific business function **plus** a unit role of **Supervisor** or above.

9. Select "IN" from the **In/Out** drop-down menu to in-assign the worker to this unit as their primary work location unit.

- Workers can be assigned to multiple units, but must have one – and only one - "In" assignment.



When work is submitted for approval, it goes to the Unit Approver of the unit where the worker is in-assigned.

- If a worker needs access to additional units, they can be out-assigned to those units after they have been in-assigned to their primary one.

10. Assign Unit Approver status, if needed, by clicking on the **Unit Approver** checkbox.

- Each unit must have a designated Unit Approver.
- There can be only one approver per unit.
- The Unit Approver may be in- or out-assigned to a unit.
- You must uncheck the Unit Approver checkbox from an existing approver and click the **Modify** button before you

can select a different approver, re-click the checkbox and use the **Modify** button to make the change.

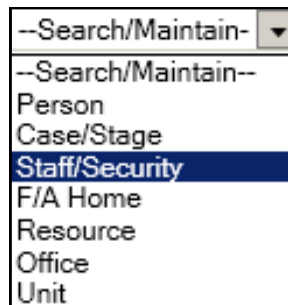
- **You cannot save the changes to the unit and exit this window until a Unit Approver has been selected.**

11. Click the **Modify** button; then click **Save** button (or **Save and Close** if all changes to this unit have been made).
12. Once all the staff except the temporary Unit Approver (“Person, Conversion”) have been reassigned out of the Conversion unit, the unit is no longer needed and should be deleted.

See the CONNECTIONS Tip Sheet, “Working with Units” for information on how to delete a unit.

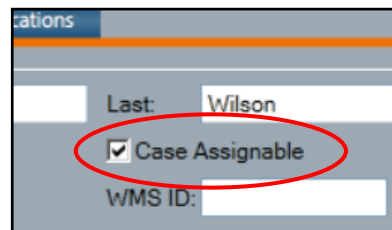
Step 2 - Enter Worker Information

1. From the Search/Maintain drop-down menu, select **Staff/Security**.
2. Enter the worker’s last name and click the **Search** button or leave all fields blank and click **Search** to display a list of your entire agency’s staff.
3. Highlight the desired worker’s name.
The Detail tab for that worker displays.
4. On the **Detail** tab, if the worker will be assigned a workload, click the **Case Assignable** checkbox.



--Search/Maintain--
--Search/Maintain--
Person
Case/Stage
Staff/Security
F/A Home
Resource
Office
Unit

If the worker will not be carrying a caseload, leave this box unchecked.

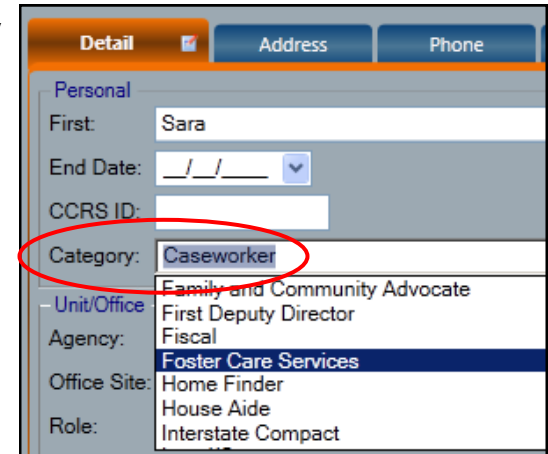


Last: Wilson
 Case Assignable
WMS ID:

5. Using the **Category** drop-down menu, choose the appropriate type for the worker. This information will display in the worker’s listing on the staff search results window.

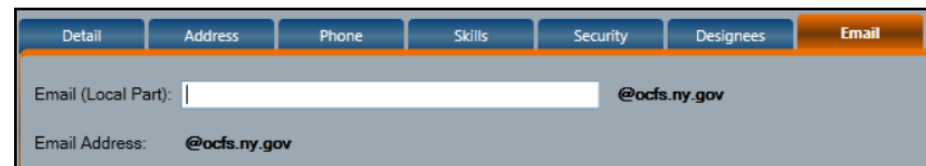
Note: “Category” only describes the type of work this worker does. It is **NOT** the same thing as a “Job Type”, which is used for Security purposes.

See page 4 of this tip sheet for additional information on Job Types.



Detail Address Phone
Personal
First: Sara
End Date: / /
CCRS ID:
Category: Caseworker
Family and Community Advocate
Unit/Office: First Deputy Director
Agency: Fiscal
Office Site: Foster Care Services
Home Finder
House Aide
Role: Interstate Compact

6. Click the **Save** button.
7. Click the **Address** tab, complete information in the Address window and click the **Save** button.
8. Click the **Phone** tab, complete information in the Phone window and click the **Save** button.
9. If desired, enter information in the **Skills** tab.
10. On the Email tab, enter the **local part** of the worker’s email address and click the **Save** button.



Detail Address Phone Skills Security Designees Email
Email (Local Part): @ocfs.ny.gov
Email Address: @ocfs.ny.gov

11. If the worker is involved in the placement of children in foster care and will need to receive one or more placement related notifications, check the appropriate checkbox(es) on the Notifications tab.

Email Notification Lists	
<input type="checkbox"/>	New placement request
<input type="checkbox"/>	Placement referral received
<input type="checkbox"/>	Placement referral response
<input type="checkbox"/>	Placement request closed
<input type="checkbox"/>	Child(ren) placed
<input type="checkbox"/>	New resource created
<input type="checkbox"/>	Resource modified
<input type="checkbox"/>	Placement verification required
<input type="checkbox"/>	Activities data entry required

12. Click the **Save** button.

See the document, *Placement Notifications*, on the Implementation page of the CONNECTIONS website for definitions of these notifications and to whom they should be assigned.

Step 3 - Assign Business Functions

All workers given access to CONNECTIONS are automatically assigned the “Standard Access” business function (BF). This BF allows access to their own Workload, To-Dos and Uploads tabs and certain links on the Search/Maintain menu.

Additional business functions should be assigned only if additional access is needed. Workers who only need to record progress notes and complete Family Assessment and Service Plans (FASPs) for their own cases, for example, would not need to be assigned any additional business functions.



Workers should only be assigned the access their job duties require.

To assign business functions:

1. With the worker still highlighted on the Staff Search window, click the **Security** tab.
2. Assign business functions by clicking on the checkboxes corresponding to the needed

Business Functions	
<input type="checkbox"/>	CASE/PERS SRCH
<input checked="" type="checkbox"/>	CPS CASEWORKER
<input type="checkbox"/>	CPS SUP LIMITED
<input type="checkbox"/>	CPS SUPERVISOR
<input checked="" type="checkbox"/>	CREATE FSI
<input checked="" type="checkbox"/>	ENTER PROG NOTE
<input type="checkbox"/>	FAD_CASEWORKER

business functions.

Some listed business functions actually contain a number of security attributes bundled together to make security assignment easier. The following are bundles:

- CPS Caseworker
- CPS Supervisor
- CPS Supervisor Limited
- FAD caseworker
- FAD Supervisor

If a particular security attribute is assigned as part of a bundle, it should not also be assigned as an individual business function.

To see the list of security attributes contained in a business function bundle, highlight the business function and scroll through the resulting list in the Security Attributes section.

Security Attributes contained in the selected business function. Scroll down to see all.

See the CONNECTIONS Tip Sheet, “*Understanding Business Functions*” for more information and a list of security attributes contained in each business function bundle.

3. When selections are complete, click the **Save** button

Step 4 - Assign Job Types (OPTIONAL)

If - and ONLY if - your agency is using Agency Access settings as part of its security strategy, workers marked as Case

Assignable (those to whom a stage role can be assigned) may be assigned one or more “Job Types” on the Staff Security window.

Agency Access is an **OPTIONAL** setting that permits staff with the same job type to access FSI and FSS stages on each other’s workloads. **Not all agencies use this feature.**

Job Types	
<input type="checkbox"/>	FISCAL STAFF
<input checked="" type="checkbox"/>	FOSTER CARE CASEWORKER
<input type="checkbox"/>	FOSTER CARE DIRECTOR
<input type="checkbox"/>	FOSTER CARE SUPERVISOR
<input checked="" type="checkbox"/>	HOME FINDER
<input type="checkbox"/>	HOME FINDING SUPERVISOR



Do not assign ANY Job Types if your agency does not use this form of security structure.

To assign a Job Type:

1. With the worker highlighted on the Staff Search window, click the **Security** tab.
2. Assign one or more Job Types by double clicking on the corresponding checkboxes.
3. Click the **Save** or, if all changes have been made, the **Save & Close** button.

For more information on the functioning of Agency Access and Organizational Hierarchy settings, see the CONNECTIONS Tip Sheet, “Agency Access and Organizational Hierarchy”.

Additional Considerations

In order for a worker to access CONNECTIONS, they may need additional permissions.

- Voluntary agency workers who access CONNECTIONS via their agency’s own network must be granted access to that network.

- Agency or district workers with high speed Internet access can access CONNECTIONS directly over the internet via <https://connections.ocfs.ny.gov>.

If using non-state owned equipment (e.g., an agency computer), a one-time download of the Citrix Receiver application is required. A download link and instructions are available on the website. Because administrative rights to the computer/laptop/tablet are required to complete the download, this may necessitate assistance from you district or agency’s IT staff.

Once the download is complete, open the CONNECTIONS application by double-clicking the CONNECTIONS icon.



- If a worker needs to access WebStar, ARS, the OCFS Intranet and/ or the Data Warehouse (Cognos Analytics) from a non-state owned computer, SSL-VPN access and an RSA token are also needed.

Resources

- 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>

ITS Enterprise Service Desk
1-844-891-1786