



# CONNECTIONS Security Tip Sheet

## Accessing Someone Else's Workload & To-Do's

updated February 2021

Work within CONNECTIONS frequently requires accessing the workload or To-Do list of someone else, such as when a Supervisor reviews the work of a supervisee, approves work on behalf of a colleague or when workers need to record information in a stage on someone else's workload. CONNECTIONS has many levels of security designed to allow flexibility in assigning access so that workers can complete their authorized duties. This tip sheet covers the more common methods by which someone can access the Workload or To-Dos of another person.

### Access via the Unit Summary Access Path

One basic method of granting access to the Workload or To-Do tab of another person within a unit requires that the person seeking access:

- Be a member of that unit (in- or out-assigned)
- Have the Unit Summary Access (UNIT SUM ACCESS) business function **AND**
- Be the Unit Approver of the unit **OR** be assigned a role in the unit **higher** than that of the Unit Approver.


These conditions grant the same full access/permissions to stages and To-Dos as the owner of the workload – including the ability to search previous history of persons on that Workload through the Implied Role path, see stages marked as sensitive, run OCI reports, make assignments and complete work in FASPs and PHRs.

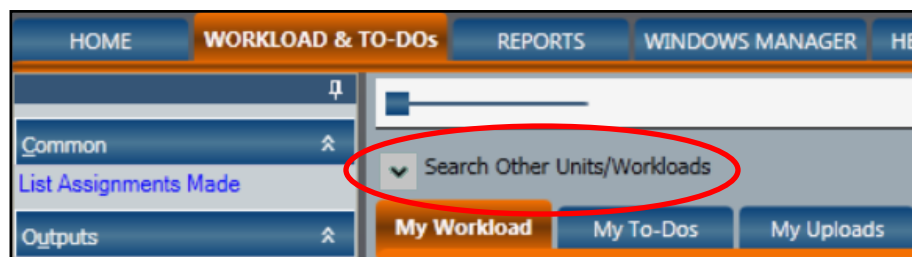


**REMINDER:** Staff should be granted only the minimum access necessary to complete their authorized duties.

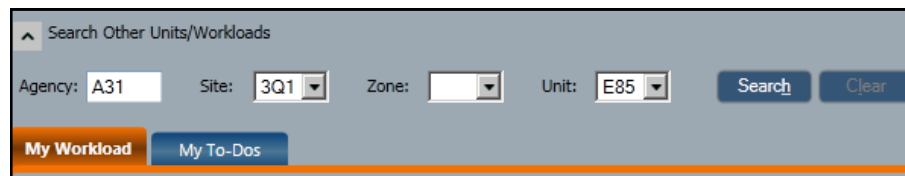
### Navigating to Someone Else's Workload/To-Do List

1. Workers assigned the **UNIT SUM ACCESS** business function, will see "Search Other Units/Workloads" above the My Workload, My To-Dos and My Uploads on their workload window.

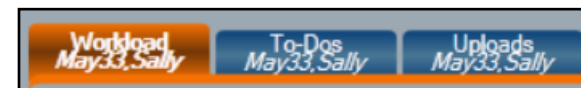
Click the downward arrow  to open the Unit Search window.



The fields in the resulting search window will be prefilled with information for the unit to which you are in-assigned.



2. If you wish to search for a worker in a unit other than your own, enter the **Site**, **Zone** (if any) and **Unit** for their unit.
3. Click the **Search** button.
4. On the resulting grid, select the name of the worker whose Workload, To-Dos or Uploads you wish to access
5. Click the **Go** button at the lower right of the grid to open that worker's Workload, To-Dos or Upload



**Navigation Hint:** You can click on the grey Search Other Units/ Workloads box to temporarily collapse the Staff List grid and reduce the need for scrolling.



### Completing Approvals When the Unit Approver is Out

1. Navigate to the **My To-Dos** tab of the absent approver, using the steps above.
2. Click the **Navigate** link on the To-Do of the needed approval to open the item to be reviewed.

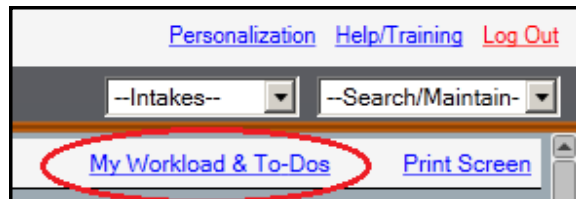
	Type	Status	Date	Case Name
<input type="checkbox"/> <a href="#">Navigate</a>	T	NEW	02/21/2003	Hobbs, Tami
<input type="checkbox"/> <a href="#">Navigate</a>	T	NEW	02/25/2003	Connors, Sandra

3. Once you've reviewed the item, close it.  
*The Approval window automatically opens.*
4. Highlight the original Approver's name to enable the **Save** button.  
To use the **Reject** button, you must first type in the Comments field.



**Reminder:** CONNECTIONS will log the approval/rejection under the name of the person actually doing the approval, not under the name of the staff person to whom it was submitted.

To return to your own workload, click the **My Workload & To-Dos** link in the upper right corner.



### Assignee/Designee Path

A staff person who temporarily assigns their security rights to another worker is known as an **Assignee**. The worker receiving those rights is known as their **Designee**.

Assigning Designee status temporarily grants all of your security rights to another worker - including those resulting from assigned business functions, unit membership and unit hierarchy. Because one's Security Profile may include powerful business functions such as Maintain Security, View Sensitive and Access Sealed Adoption, this option should be exercised with great care.

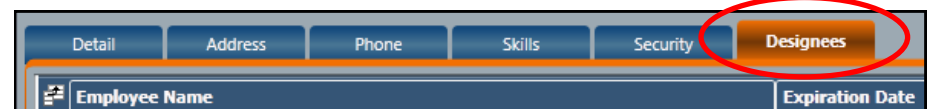
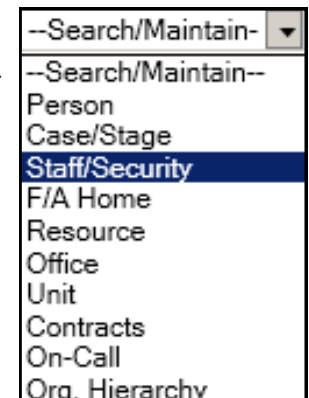


**IMPORTANT!** Designee status is intended to be used for time-limited, *temporary* planned absences such as vacations and medical leave. If longer term access is required, access should be assigned through business functions or other security paths.

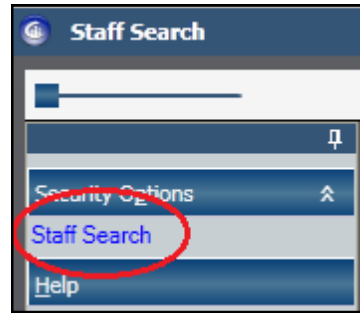
### Creating a Designee

Any worker with the **Maintain Designee** Business Function can create their own designee assignments. The Security Coordinator – or other staff with the **Maintain Security** Business Function – can assign the Maintain Designee Business Function or can create designees for other workers in their agency.


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



4. Use the **Staff Search** link in the left navigation pane to locate the name of the staff person to whom Designee status will be assigned.




5. Highlight the worker's name and click the **OK** button to the lower right of the grid.
6. Enter an Expiration Date.
7. Click the **Save** or **Save & Close** button.

 See the CONNECTIONS Security Tip Sheet, *Understanding Designees and Assignees* for additional information on this topic.

### Access via the Agency Access Path

Access to FSI and FSS stages - but not CPS or FAD stages - can be granted to groups of workers using Agency Access and Organizational Hierarchy settings – a complex security scheme not covered in this Tip Sheet.

 See the CONNECTIONS Security Tip Sheet, *Agency Access and Organizational Hierarchy*, for additional information on this topic.

### Specialty Path Access

Some workers, such as clerical or medical staff, may only need access to a portion of the record (e.g., health, education, Service Plan Reviews or progress notes). For these workers, specialty paths offer a way to grant targeted access without opening up

access to the entire case record.



Please see the CONNECTIONS Security Tip Sheet, “*Specialty Path Access*” for more information on this type of access.

### 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)

A Helpdesk ticket is now required before sending requests to the Triage Unit. This can be acquired by emailing [Fix-It@its.ny.gov](mailto:Fix-It@its.ny.gov).

ITS Enterprise Service Desk  
1-844-891-1786