



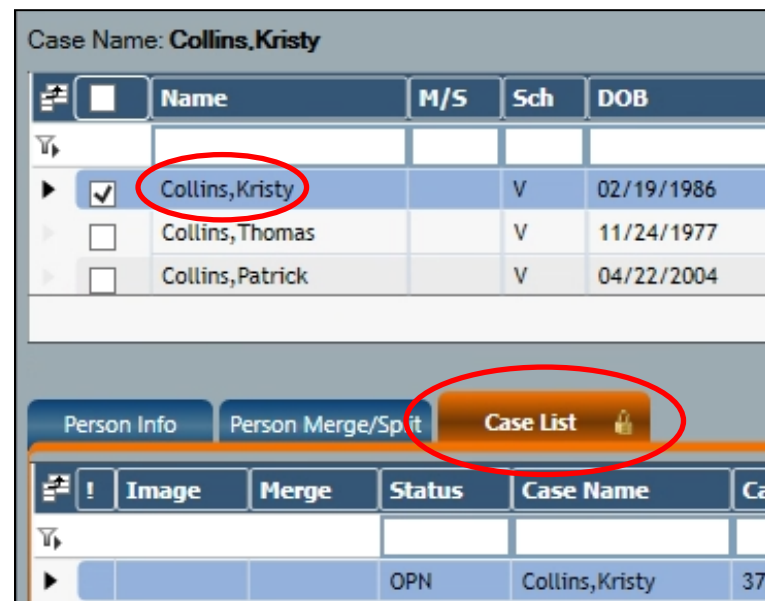
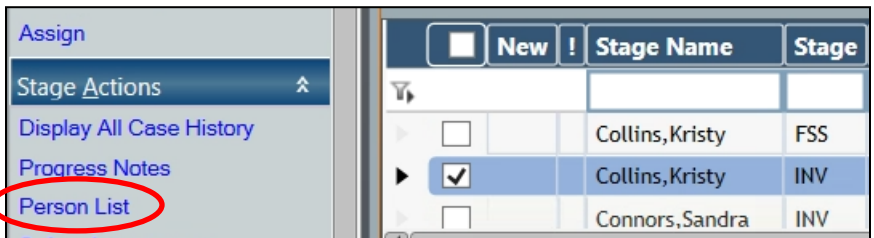
Best casework practice requires that you review all historical information for a case in which you have an assigned role. Conducting a Person Search, however, limits the information available to stages within your own district. If a stage on your workload (or on a workload you can access) has a person with the same Person Identification number (PID) as another stage or case, you have an "Implied role" in that stage/case. This is true for both open stages/cases and closed ones. An implied role allows you to view information in the related stage/case(s), even those from another district. Additionally, it allows you to identify other involved worker(s) so you can follow-up directly with them.

Voluntary Agency workers may also have an implied role, but, by regulation, cannot access CPS Intake (INT) information or unfounded CPS investigation (INV) stages involving a person in common. Access is allowed, however, for indicated INV stages, those currently under investigation, Family Service Intake (FSI) and Family Service Stage (FSS) stages.

This tip sheet is for all workers needing to access historical information for persons on a stage in which they currently have a role.

Step-by-Step: The Implied Role Path

1. Highlight a stage on your workload.
2. Click the **Person List** link in the **Stage Actions** section of the left navigation pane.



3. On the **Person List**, select the person whose history you wish to view.
4. Select the **Case List** sub-tab.
5. On the Case List, select the case you want to review

6. Select the **Case Summary** tab.

Merge	Stage Name	Stage	Type	Determination	County	Zone	CD	PGM	Opened	Closed
	Collins,Kristy	FSS	CWS		031			CPS	04/24/2009	
	Collins,Kristy	FSI	CWS		031			CPS	04/24/2009	04/24/2009
	Collins,Kristy	INV	INI		031			CPS	04/24/2009	
	Collins,Kristy	INT	INI		031			CPS	04/24/2009	04/24/2009

7. Select the stage you want to review.

8. Select the **Stage Events** tab.

Event Date	TX Date	Status	Type	Description	Stage
		NEW	Assessment	Safety Assessment - 7 Day	INV
		NEW	Conclusion	Investigation Conclusion	INV
		NEW	Risk Assessment Profile	Risk Assessment Profile	INV

9. Select the event from the list you want to review:

- For INT stages, select **Record Call**. (Only available to LDSS workers with View Reporter/Source business function.)
- For INV, FAR, FSI or FSS stages, select **Stage Summary** to open the entire stage
- To see just the conclusion of an INV stage, select the **Investigation Conclusion** event.

Navigation Hint:

Use the filter bar to easily find the event you are looking for.

Event Date	TX Date	Status	Type	Description	S
06/25/2009	06/25/2009	COMP	Summary	st Stage Summary	It

For example, enter the letters “**st**” under the Description column to filter for the Stage Summary event.

10. Click the **Detail** link in the Events Options section of the left navigation pane to open the selected stage event in view-only mode.

Event Date	TX Date	Status	Type
06/25/2009	06/25/2009	COMP	Summary

11. If you select “Stage Summary” as the event, use the links in the Options section of the left navigation pane to navigate to the windows you need to review.

The links display will depend on the type of stage chosen.

CPS INV

- Options ^
- Case Summary
- Review Intake
- Allegations
- Investigation Actions
- Safety Assessments
- Risk Assessment
- Progress Notes
- Investigation Conclusion
- Sex Trafficking Screening
- Missing Child
- Foster Home Identification
- Photos/Docs
- View All Photos/Docs
- Placement
- Person Options ^
- Family Relationship Matrix
- Photos/Docs

CPS FAR

- Options ^
- Case Summary
- Review Intake
- Allegations
- FLAG
- Action Plan
- Safety Assessments
- Risk Assessment
- Progress Notes
- Primary/Secondary Caretaker
- FAR Conclusion
- Sex Trafficking Screening
- Missing Child
- Foster Home Identification
- Photos/Docs
- View All Photos/Docs
- Person Options ^
- Family Relationship Matrix
- Photos/Docs

FSS

- Options ^
- Case Summary
- Progress Notes
- FASP
- Service Plan Review
- Permanency
- Health Services
- Education
- Outside Participants
- Tracked Children
- Close Stage
- Sex Trafficking Screening
- Missing Child
- Photos/Docs
- View All Photos/Docs
- Placement
- Person Options ^
- Primary/Secondary Caretaker
- Family Relationship Matrix (C)
- Compare WMS Data
- Bridges To Health (B2H)
- Photos/Docs

Access For Voluntary Agency Workers

Voluntary Agency workers are prohibited, by law, from viewing Reporter/Source information (INT stages) and unfounded CPS reports. When an INV stage is selected by a voluntary agency worker, one of two messages will display:

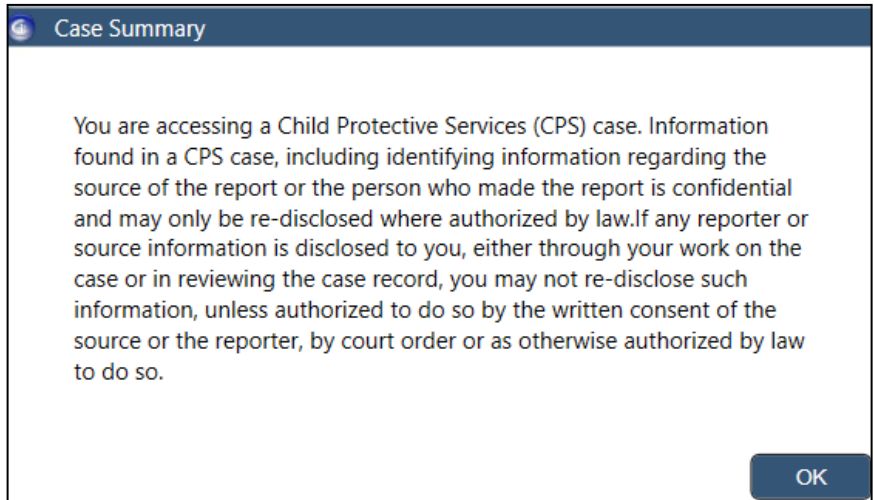
- If all INV stages in the selected case are either unfounded or pre-date 1/1/2006, you will receive a message that you are not allowed to view the information.

Comp
Case Events
Case Summary

CASE CANNOT BE VIEWED BY VOLUNTARY AGENCY STAFF.

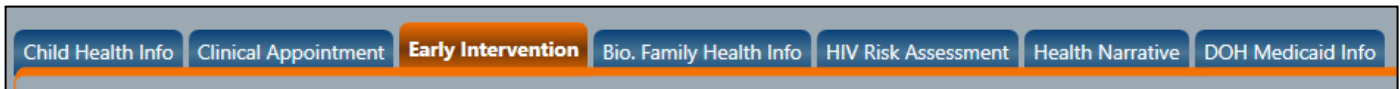
- If the case contains only CPS stages that are indicated and/or under investigation, you will receive a pop-up agreement message reminding you of your confidentiality responsibilities.

Click the **OK** button to proceed and open the stage/event for viewing.



Access Reminders

- **Viewing history via the Implied Role path allows greater access to information—including cross-district access—than conducting a Person Search from the Search/Maintain menu.**
- Implied role access applies to both district and voluntary agency workers. However, voluntary agency staff are not be able to view:
 - CPS Intake (INT) stages,
 - unfounded CPS Investigation (INV) stages or
 - any CPS Investigation stages that predate 1/1/06.
- Because of it's more protected nature, the only tab in the Health Services module of a Family Services Stage the that can be accessed via the implied role path is Early Intervention unless the worker is also assigned the VIEW HEALTH business function.



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.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