CONNECTIONS Tip Sheet

Office of Children and Family Services

Using Reminder To-Dos to Share Confidential Information

December 2017

Email systems do not provide sufficient security to preserve the confidentiality of information. When confidential case and individual client information needs to be shared, the CONNECTIONS system is the most secure method for doing so, and should be used whenever possible. In CONNECTIONS, a Reminder To-Do can be created for any user, even one at another district or agency, to securely convey confidential information. This Tip Sheet is for any CONNECTIONS user that needs to create and manage Reminder To-Dos.

The My To-Dos tab

To-Dos are located on the My To-Dos tab which is accessed from the WORKOAD & TO-DOs tab.

Types of To-Dos

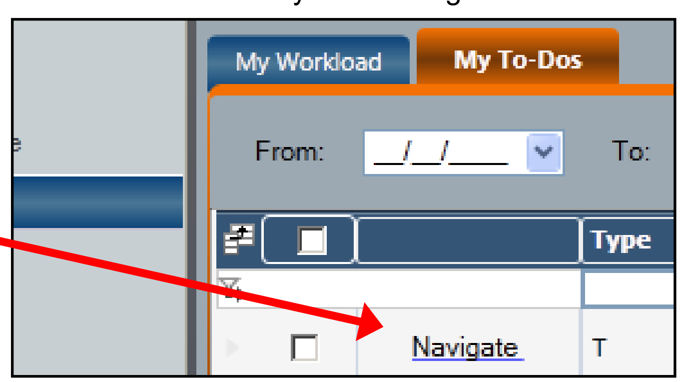
There are three types of To-Dos available in CONNECTIONS:

- **Reminder To-Dos** can be created by and for any CONNECTIONS user. They can be used to help you remember something that needs to be completed (e.g., scheduling a meeting) or can be created and assigned to another CONNECTIONS user (e.g., sending confidential information to someone or asking your supervisor to review your work). Reminder To-Dos can be deleted when no longer needed.

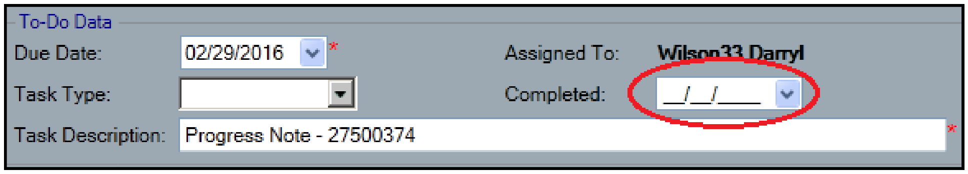
- **Alert To-Dos** are system-created notifications that something has happened or needs to happen. Alert To-Dos are sent, for example, when a new stage is assigned to your workload, when a Safety Assessment, FASP or PHR is coming due or when a person in a stage on your workload is involved in a new CPS report. Alert To-Dos, like Reminder To-Dos, can be deleted when they are no longer needed.

- **Task To-Dos** can be either system- or user-generated to notify workers that there is a task that must be completed by a particular date.

  Task To-Dos cannot be deleted. Task To-Dos can only be removed by using the **Navigate** link and completing the task.



User-generated Task To-Dos must have a completion date entered on the Task To-Do Detail window in order for them to be removed from your To-Do list.

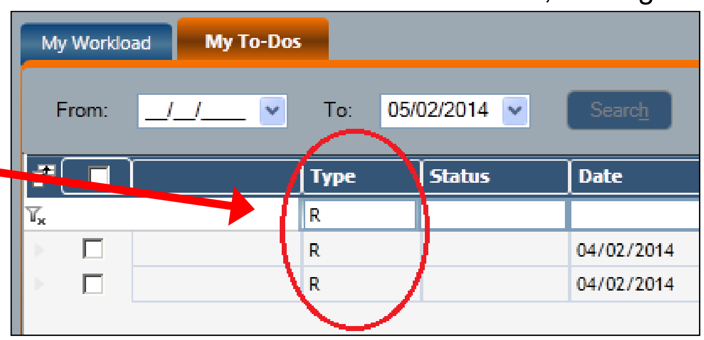


Managing To-Dos

It is essential to regularly review your To-Dos so that important information is not overlooked.

New To-Dos appear at the *bottom* of your To-Do list, so deleting Alerts and Reminders that are no longer needed is highly recommended.

Column headers and the filter bar in the To-Do grid can be used to sort and filter the To-Do list, making individual items easier to find.



Hint: Entering a letter in the Type column of the filter bar will filter out all but the type of To-Do you want to see.

Use "**A**" for Alert, "**T**" for Task and "**R**" for Reminder To-Dos.

In order to keep the To-Do list from becoming unmanageable, non-Task To-Dos are automatically deleted according to the following schedule::

Type of Stage	To-Do Displayed for
INT, INV, ARI and To-Dos not associated with a Stage	30 days
FSI, FSS To-Dos	90 days
FAD To-Dos	180 days

Navigable Task and Approval To-Dos cannot be deleted; they remain on the To-Do list until the associated task is completed.

Creating a Reminder To-Do

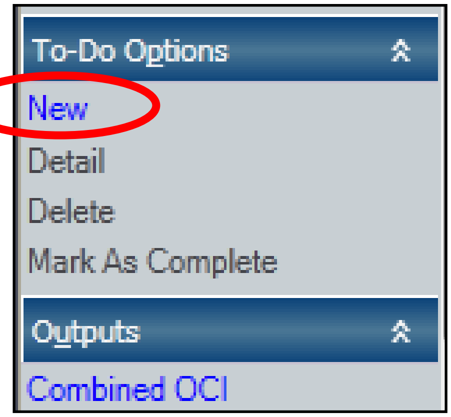
If confidential information must be transmitted from one worker to another, using a CONNECTIONS Reminder To-Do is much more secure than using an e-mail message.

There are two paths by which to create a Reminder To-Do:

- from your Workload or
- from the My To-Do tab

Reminder To-Dos that are created from the workload will automatically display the case name, stage ID and stage name associated with the To-Do while those created on the My To-Dos tab will not.

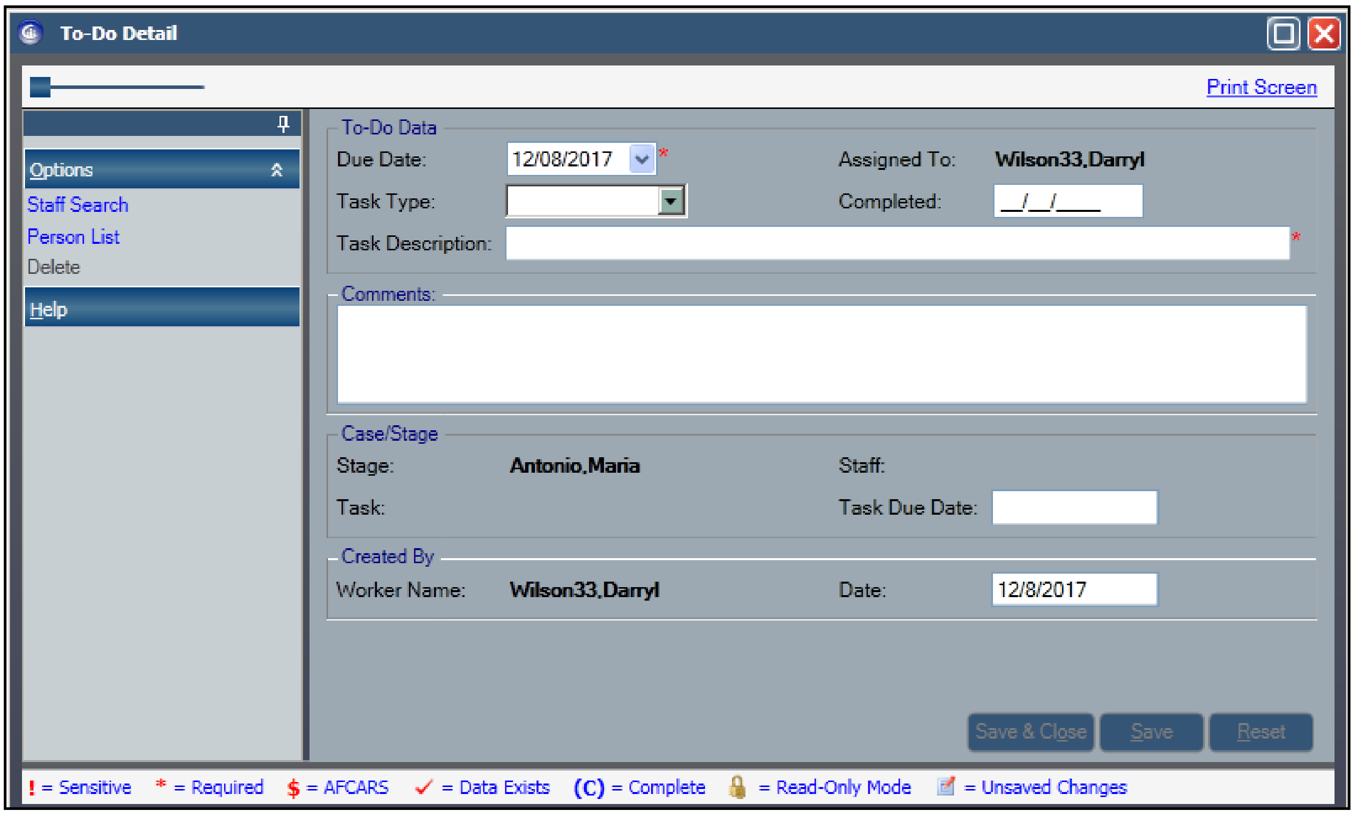
Step-by-Step, Creating a Reminder To-Do from the Workload



1. From your workload, highlight the stage for which you wish to create an associated Reminder To-Do.
2. Click the **New** link in the To-Do Options section of the navigation pane.

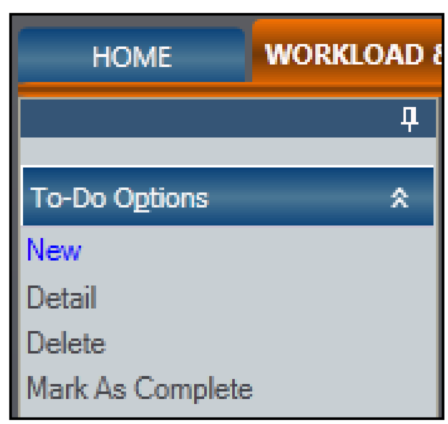
   The To-Do Detail window opens.

   The selected case name will display on the To-Do Detail window.
3. Complete the To-Do Detail window. Required fields are indicated by a red asterisk.



   The Comments field in a Reminder To-Do can accommodate up to 2,000 characters.
4. Click the **Save** or the **Save & Close** button.

Step-by-Step Creating a Reminder To-do from the My To-Dos Tab



1. Click on the **My To-Dos** tab.
2. Click the **New** link in the To-do Options section of the left navigation pane.

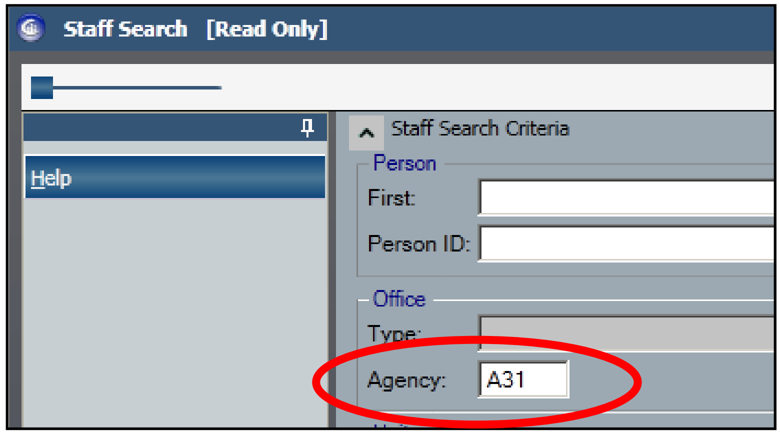
   The To-Do Detail window opens.
3. Complete the To-Do Detail window. By default, the Reminder To-Do will be assigned to the worker who created it.
4. If you want the To-Do assigned to someone else, click the **Staff Search** link in the navigation pane.

The resulting Staff Search window will default to your own agency. If you wish to assign the To-Do to someone, in a different district or agency, you must enter the Agency Code for that district or agency.

5. Select the correct result and click the OK button.

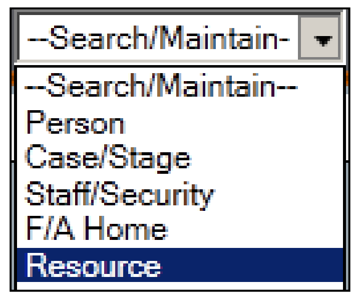
   You are automatically returned to the To-Do Detail window.

6. Click the **Save** or the **Save & Close** button.



Finding an Agency Code

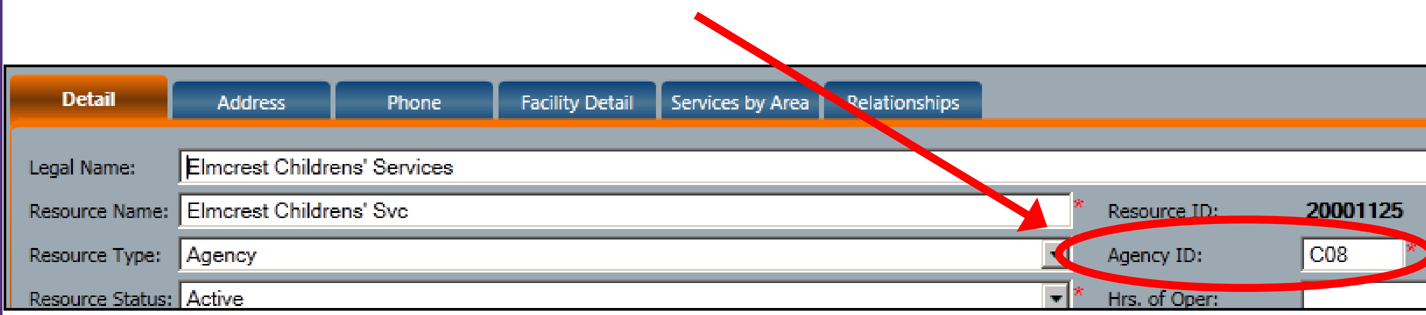
Don't know the Agency Code? You can find it in CONNECTIONS by searching the Resource directory.



1. Select **Resource** from the Search/Maintain menu.
2. Enter the name of the district/agency in the "Resource Name" field and click the **Search** button.
3. Highlight the entry you wish to see from the search results.

   The Detail tab opens, below the results grid.

4. The Agency Code can be found in the "Agency ID" field on the Detail tab.



Resources

CONNECTIONS Job Aids and Tip Sheets are now available on the Helpful Info tab in CONNECTIONS!

- CONNECTIONS Regional Implementation Staff: http://ocfs.state.nyenet/connect/contact.asp
- CONNECTIONS Application Help Mailbox: *(NOTE: address contains an underline)* ocfs.sm.conn_app@ocfs.ny.gov
- CONNECTIONS Communications Mailbox: connectionsi@ocfs.ny.gov
- ITS Enterprise Service Desk 1-800-697-1323