



CONNECTIONS Tip Sheet

Implied Role/Cross District Access

If a stage on your workload shares a person in common (has the same PID) with another stage (open or closed), you have an **implied role** in that stage. This role allows you (or others with access to your workload) view-only access to the information in the related stage(s). Best casework practice requires that all historical information for a case in which you have a role be reviewed, including stages in which you have an implied role. Additionally, the names of other workers involved on the stage can be obtained, allowing you to follow-up directly with them.

Voluntary Agency workers cannot access CPS Intake (INT) information or unfounded CPS Investigation (INV) stages, but *can* review INV stages that have been indicated or are currently under investigation, as well as closed Family Service Intake (FSI) and Family Service Stage (FSS) stages.

Viewing a Stage in which you have an Implied Role

1. Highlight a stage on your workload and click the **Person List** link in the **Stage Actions** section of the NAVIGATION PANE.

Stage Name	Stage	Type
Brown, Sherry	FSS	CWS
Casey, Mary	FSS	ADVPO
Collins, Kristy	FSS	CWS
Gilbert, Martha	FSS	CWS

2. On the **Person List**, highlight the person whose history you wish to view.

Name	M/S	Sch	DOB
Collins, Kristy		V	02/19/1984
Collins, Kimberly		V	08/16/2007
Collins, Patrick		V	04/22/2000
Collins, Thomas		V	11/24/1975
Collins, Tyler		V	03/30/2014

Image	Merge	Status	Case Name	Case ID	Dist/Agy
		OPN	Collins, Kristy	37300160	MANHATTAN

3. Click on the **Case List** sub-tab.
4. On the Case List, highlight the case you want to review
5. Click on the **Case Summary** sub-tab.

Case ID: 37300160 Case Manager: Miller221, Jamie
Status: Open Start Date of Case: 7/1/2009

Merge	Stage Name	Stage	Type	County	Zone	CD	PGM	Opened
	Collins, Kristy	FSS	CWS	072		M01	CPS	04/24/2009
	Collins, Kristy	FSI	CWS	072		M01	CPS	04/24/2009
	Collins, Kristy	INV	INI	072		M01	CPS	04/24/2009

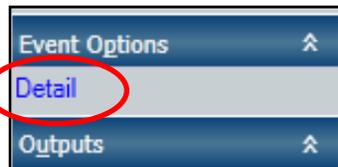
6. Highlight the stage you want to review.

Stage Events				
Event Date	TX Date	Status	Type	Description
09/12/2014	09/12/2014	COMP	Stage	Stage Summary

- Click on the **Stage Events** sub-tab.
- Click on the event from the list you want to review:
 - For INT stages, select **Record Call**.
 - For INV, FAR, FSI or FSS stages, select **Stage Summary**.

Use the filter bar to easily find the event you are looking for. For example, enter the letters "St" to filter out all events that don't begin with "St".

- Click on the **Detail** link in Events Options section of the NAVIGATION PANE to open the stage in view-only mode.



- Use the links in the Options section of the NAVIGATION PANE to navigate to the windows you need to review.

CPS Stage Summary Options

- Options
- Case Summary
- Review Intake
- Allegations
- Investigation Actions
- Safety Assessments
- Risk Assessment
- Progress Notes
- Investigation Conclusion
- Sex Trafficking Screening
- Missing Child
- Foster Home Identification

FSS Stage Summary Options

- Options
- Case Summary
- Progress Notes
- FASP
- Service Plan Review
- Permanency
- Education
- Outside Participants
- Tracked Children
- Close Stage
- Sex Trafficking Screening
- Missing Child

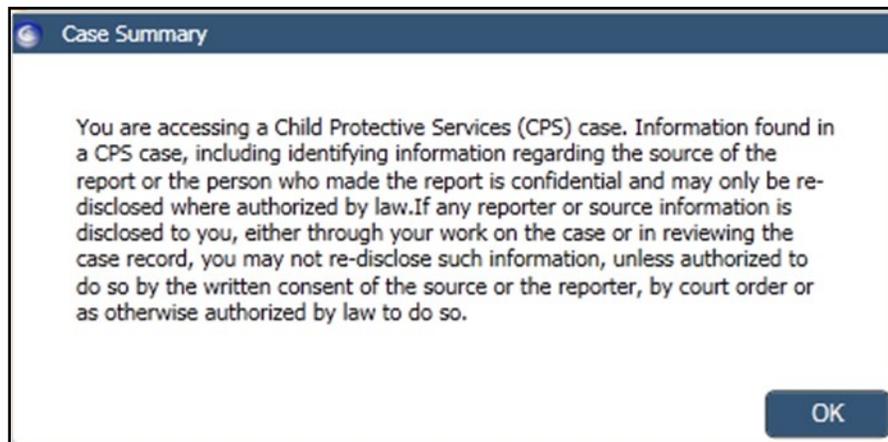


If you are a Voluntary Agency worker, and you select an INV stage, you will receive one of two messages:

- If all INV stages are unfounded and/or predate 1/1/2006, you will receive a message that you are not allowed to view the information:

CASE CANNOT BE VIEWED BY VOLUNTARY AGENCY STAFF.

- If the case contains only indicated and/or open stages under investigation, you will receive a pop-up agreement reminding you of your confidentiality responsibilities. Click "ok" to proceed.



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.

Access reminders continued on page 3

Implied role access applies to both district and voluntary agency workers. However, voluntary agency staff are not able to view:

- CPS Intake (INT) stages
- unfounded CPS Investigation (INV) stages
- any CPS Investigation stages that predate 1/1/06

The implied role path gives District workers access to cross-county information that they do not have when using Person Search from the Search/Maintain drop-down menu.

The Early Intervention tab is the only Health Services information in a Family Services Stage that can be accessed via the implied role path.

Resources

- CONNECTIONS Job Aids and Tip Sheets:
<http://ocfs.ny.gov/connect/jobaided/jobaided.asp>
- CONNECTIONS Regional Implementation Staff:
<http://ocfs.ny.gov/connect/contact.asp>
- CONNECTIONS Application Help Mailbox:
ocfs.sm.conn_app@ocfs.ny.gov
(NOTE: address contains an underscore)
- CONNECTIONS Communications Mailbox:
connections@ocfs.ny.gov

ITS Enterprise Service Desk
1-800-697-1323