CONNECTIONS Security is a complex topic and offers a variety of strategies and options to create the unique system of access that best fits the business needs of each district. The assignment of Business Functions is one of the most basic ways to create access – and, for some districts, may be all that is needed. Decisions regarding what access is to be assigned to their workers are left to the discretion of each district. However, best security practice dictates that workers should only be assigned the access required to fulfil their job responsibilities and should only access that information for which they have a legitimate business need.

Security Coordinator and Back-up Security Coordinator
Each district is responsible for designating a CONNECTIONS Security Coordinator and a Back-up Security Coordinator to manage the CONNECTIONS security needs for the district. Security Coordinators and their Back-ups should be assigned the MAINT SECURITY, MAINT STAFF and MAINT UNIT business functions at a minimum.

Role in Unit/Unit Hierarchy
*: All workers must be assigned to a unit, in one of four hierarchical roles (Workers, Supervisors, Maintainers, and Managers.) These roles do not necessarily correspond to job titles. Each unit also contains a Unit Approver, typically the supervisor of the unit. A worker who is the Unit Approver and has been assigned the UNIT SUM ACCESS Business Function will have access to the workloads and To-Dos of all workers in that unit. If Unit members other than the Unit Approver need to access the workloads of other unit members, they will need the UNIT SUM ACCESS Business Function and a role in the unit hierarchy **above** that of the unit approver.*

Bundled Business Functions
Each Business Function consists of one or more Security Attributes. For ease of assignment, some Business Functions are a "bundle" of commonly assigned attributes suitable for a particular kind of worker (e.g., CPS Caseworker, CPS Supervisor, FAD Caseworker). Bundled functions must be assigned as an all-or-none group. If you do not wish to assign all the attributes in the bundle, you should assign the desired attributes as individual Business Functions.

Business Functions that Require Assignment by OCFS
Due to their powerful nature and, in some cases, potential financial impact, certain Business Functions can only be granted by OCFS. These (ASG MN ACTIVITY, DIR ACT ENTRY, MAINT AGY ACC, MAINT ORG HIER) are highlighted in the descriptions on the following pages.

Additional Help
For additional information on CONNECTIONS security, see the following CONNECTIONS Security Tip Sheets: Understanding Business Functions, Working with Units, Agency Access & Organizational Hierarchy and Understanding Designees and Assignees, located on the Tip Sheet page of the CONNECTIONS website.

 For additional questions or concerns contact your CONNECTIONS Implementation Team member.

The business functions below are presented in alphabetical order for ease of use.

Business Function	Security Attributes	Description	Recommendations	Comments
ACCESS ALL DISTRICT	• Case Search • Access All in District	This Business Function (BF) allows read-only access to all case details for all cases, open or closed, in the worker's district. Additional Business Functions are still needed to view details controlled by other profiles, such as MAINT FAD HIST for home history or VIEW HEALTH for health information.	It is recommended that this Business Function be given to staff needing access to case information for the entire district.	The district of the case includes the district of the current Primary worker, Secondary worker(s), Case Manager, Case Planner, Case Worker(s) or CPS Worker/Monitor on a stage. The historical district of the case includes the district of the worker(s) on a stage at the time of closing. **This BF does not provide cross-district access**, which is only available from a workload using the Implied Role path. See the CONNECTIONS tip sheet, *Implied Role/Cross District Access* for more information on this path. **This BF is required to view CPS data in the OCFS Data Warehouse.**
ACC SEALED ADOP	• Access Sealed Adoption	The ACC SEALED ADOP Business Function allows a worker to access a Child Case Record (CCR) type Family Services Stage (FSS) that has been sealed due to the finalization of the child's adoption. An adoption is sealed once the Finalize Adoption window is completed and saved. The CCR stage can then remain open or be closed. *If the CCR Stage Remains Open:* • The assigned DSS Case Manager is the only	It is recommended that only Adoption supervisors or those with a specific need to see sealed adoptions be given this Business Function. Careful consideration needs to be given when assigning this Business Function, as there are strict confidentiality laws and regulations regarding sealed adoptions. There should be a regular review of which workers have this Business Function to be	If the Finalized Adoption window of a CCR stage (open or closed) has not been completed and saved (e.g. the worker does not yet have all of the information to complete the finalization, the child's goal changed or the adoption was never completed), then the stage is NOT sealed. Such stages are treated like all other foster care cases and the ACCESS SEALED ADOPTION BF does not apply.

Business Function	Security Attributes	Description	Recommendations	Comments
		person who does not need this Business Function to access the Finalize Adoption window and/or modify it. • A worker with this Business Function and access to the stage can access the Finalize Adoption window in read-only mode. • A worker with access to the CCR stage, but without the Business Function cannot access the Finalize Adoption window. *If the CCR Stage is Closed:* • Workers must have the ACC SEALED ADOP BF plus access to the stage (through the ACCESS ALL DISTRICT BF, historical access or Agency Access settings) in order to access a Sealed Adoption stage. • Workers who had a role in the CCR stage at one time, but were unassigned prior to stage closure, are able to view the window if they have the ACC SEALED ADOP BF.	sure that it is only assigned to those whose job duties require it. The ACC SEALED ADOPTION Business Function is not needed to finalize an adoption.	
ACC SERPLAN REV	• Access Service Plan Review	The ACC SERPLAN REV Business Function, when	It is recommended that this BF be assigned to	The following workers have the ability to create and modify Service Plan

Business Function	Security Attributes	Description	Recommendations	Comments
		paired with the CASE/PERS SRCH BF, allows a worker to access only the Service Plan Review windows for any Family Services Stage (FSS) assigned to a worker in their district. The worker with this Business Function and no role in an FSS stage can access, create and/or modify Service Plan Review information but does not have access to other information within the stage.	clerical or other workers responsible for scheduling and/or documenting Service Plan Review information (e.g., Third Party Reviewers), who have no need for full access to stage information.	Reviews _without_ being assigned the ACC SERPLAN REV Business Function: • Workers assigned a role in the stage, • Any worker with access to the workload of a worker with a role in the stage through unit hierarchy or • Any worker with access to the workload of a worker with a role in the stage as a result of Agency Access settings. _REMINDER:_ Use of AGENCY ACCESS settings may allow a worker with the ACC SERPLAN REV Business Function to access more than just the Service Plan Review window if they are: • Case Assignable • a Unit Approver • in a Supervisory Unit in the Organizational Hierarchy • have been assigned a Job Type
APPROVE HP INV	• Approve High Priority Investigation	At Intake, a case can be identified as High Priority based on a number of High Priority factors. Once a case is so identified, it requires a second level of approval by a NYC Manager. The NYC Manager must have the Approve HP INV Business Function and have access to the workload through a role in the stage (such as secondary).	The APPROVE HP INV BF is recommended for NYC second level managers.	**This Business Function is for NYC use only.**

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Business Function	Security Attributes	Description	Recommendations	Comments
ASG MN ACTIVITY	• Assign Maintain Activity	This Business Function gives a worker the ability to assign the MAINT ACTIVITY Business Function, which allows a worker to enter, and modify information in the Activities window (formerly CCRS)	Because of the potential financial impact of changing Activities information, districts must request assignment of the ASG MN ACTIVITY Business Function from OCFS. The BF may be assigned to either the Security Coordinator or a manager with the MAINT SECURITY BF.	**This business function can only be assigned by OCFS**. To request this BF, use the *CONNECTIONS Security Coordinator Update and Security Business Functions Request Form* on the Forms page of the CONNECTIONS website. Only workers with the ASG MN ACTIVITY BF or the MAINT ACTIVITY BF will be able to see the MAINT ACTIVITY BF listed in the Staff Security Business Function list.
ASSIGN PLACE	• Assign Placement	This Business Function provides limited access to a worker for the purpose of assigning an existing placement request to another worker for processing. Workers with this BF can update only two fields (*Placement Worker Assigned* and *Comments)* of an open placement request. All other information in the body of the request and all left navigation pane options are read-only.	This BF is intended for staff responsible for assigning a placement request to another worker for processing.	This BF is only needed in districts whose business process for placement requests requires the assignment of separate workers for different parts of the process. Workers with this BF gain access to the Placement window in one of two ways: • from a workload containing the child for whom the placement request has been initiated using the Placement link in the left navigation pane. • from the Placement link on the Search/Maintain menu if the PLACE DASH BF has also been assigned. Not all districts will need to assign this BF.
CPS CASEWORKER	• Access All in District • Case Search • Person Search	The CPS Caseworker Business Function is a **bundle** (grouping) of Security Attributes typically recommended for assignment to CPS staff.	If this bundle is assigned, do not assign the same attributes as individual functions. Workers should not be assigned the same access in multiple ways.	The CPS Caseworker Business Function can only be assigned as an all-or-none group of attributes. If a district does not wish to assign all the Security Attributes in this bundle, the desired attributes must be assigned as **individual** business functions.

Business Function	Security Attributes	Description	Recommendations	Comments
	• View Admin Review • View Call Log • View Closed FAR • View Indicated • View Open FAR • View Reporter/Source • View Under Investigation • View Unfounded			Refer to the individual Business Function listings for details on how each Security Attribute works.
CASE/PERS SRCH	• Case Search • Person Search	This Business Function allows a worker to perform statewide searches by case number, stage number, name, address, or an identifier such as a Social Security number, Person Identification Number (PID) or Client Identification Number (CIN) from the Search/Maintain menu.	It is recommended that this BF only be assigned to workers who need to perform searches outside of working in a case. Workers in the process of opening a case, or adding a new person to an existing case, have the capability to perform a person search _without_ this Business Function.	This security attribute is contained in the ACCESS ALL Business function, so workers assigned that business function do not also need this assigned as a separate BF. Any case or person search will return the following basic information: • Name • Sex • DOB • Case Stage • Stage Status • Assigned Worker • Worker's Office • Worker's Phone # • Case Composition
CPS SUPERVISOR	• Access All in District • Case Search	This Business Function is one of two possible **bundles (**groupings) of Security Attributes	This bundle is recommended for districts where CPS supervisors, in addition to	The CPS Supervisor Business Function can only be assigned as an all-or-none group of attributes. If a district does not wish to assign all the Security Attributes

Business Function	Security Attributes	Description	Recommendations	Comments
	• Person Search • Maintain Designees • Maintain Staff • Maintain Unit • Mark Sensitive Case • Case Merge/Split • Person Merge/Split • Unit Summary Access • View Admin Review • View Call Log • View Closed FAR • View Indicated • View Open FAR • View Reporter/Source • View Security • View Sensitive Case • View Under Investigation • View Unfounded	appropriate for assignment to a CPS Supervisor.	other supervisory duties, are responsible for maintaining staff information, end-dating staff and moving staff within units. The Maintain Staff and Maintain Unit Security Attributes allow a Supervisor with this bundle to maintain _all_ staff and units within the district, not just those assigned to that Supervisor's unit or site. If this bundle is assigned, do not assign the same attributes as individual functions. Workers should not be assigned the same access in multiple ways.	in this bundle, the desired ones must be assigned individually instead of using the bundle. In districts where CPS supervisors are _not_ responsible for maintaining staff information, end-dating staff and moving staff within units, the CPS SUP LIMITED bundle should be considered instead. Refer to the individual Business Function listings for details on how each Security Attribute works. A worker assigned the CPS SUPERVISOR bundle does not also need the CPS CASEWORKER or CPS SUP Limited bundles as all BFs in those bundles are included in the CPS SUPERVISOR bundle.
CPS SUP LIMITED	• Access All in District • Case Search • Person Search	This Business Function is one of two possible **bundles (**groupings) of Security Attributes appropriate for assignment to a CPS Supervisor.	It is recommended that this bundle, rather than the CPS SUPERVISOR bundle, be used in districts that prefer the convenience of assigning	The CPS SUP LIMITED Business Function can only be assigned as an all-or-none group of attributes. If a district does not wish to assign all the Security Attributes in this bundle, the

Business Function	Security Attributes	Description	Recommendations	Comments
	• Maintain Designees • Mark Sensitive Case • Case Merge/Split • Person Merge/Split • Unit Summary Access • View Admin Review • View Call Log • View Closed FAR • View Indicated • View Open FAR • View Reporter/Source • View Under Investigation • View Unfounded	It differs from the CPS SUPERVISOR bundle in that it does not include the VIEW SENSITIVE, VIEW SECURITY, MAINT STAFF or MAINT UNIT Security Attributes.	bundled functions but which do not want to routinely grant the VIEW SENSITIVE, VIEW SECURITY, MAINT STAFF or MAINT UNIT Security Attributes to supervisory staff. This bundle allows a district to restrict security maintenance to other designated staff such as their Security Coordinator and Back-up Security Coordinator. If this bundle is assigned, do not assign the same attributes as individual functions. Workers should not be assigned the same access in multiple ways.	desired ones must be assigned individually. Refer to the individual Business Function listings for details on how each Security Attribute works. A worker assigned the CPS SUPERVISOR LIMITED bundle does not also need the CPS CASEWORKER bundle as all BFs in the CPS Caseworker bundle are included in this one. Similarly, a worker should not be assigned both the CPS SUPERVISOR bundle and the CPS SUP LIMITED bundle.
CREATE FSI	• Create Family Services Intake	This Business Function allows a worker to create a Family Services Intake from the Intakes Menu.	Recommended for all workers responsible for the creation of Family Services Intake (FSI) stages.	Only one worker can be assigned a role, that of Caseworker (CW), in an FSI at a time. Assigning another worker essentially reassigns the stage. It removes the current worker and transfers the stage to the workload of the new worker. There are special rules for reassigning FSIs marked as Sensitive. The stage can only be assigned by someone with access to the assigned worker's workload through Unit Summary or via Agency Access settings. If access is through Agency Access, the View

Business Function	Security Attributes	Description	Recommendations	Comments
				Sensitive BF is also required to view and reassign the stage.
				An FSI stage may be modified by the following workers:
				• the worker assigned the Caseworker role in the stage
				• any worker with access to the workload of the worker with a Caseworker role in the stage through unit hierarchy or
				• any worker with access to the workload of the worker with a Caseworker role in the stage as a result of Agency Access settings.
DIR ACT ENTRY	• Direct Activities Entry • Maint Activity	This business function allows the entry of placement coding directly into Activities without going through the Placement module	This BF should only be assigned to select staff responsible for correcting Activities entries. It is not to be used to circumvent use of the Placement module for routine placements.	**This business function can only be assigned by OCFS.** It is available to district staff only
ENTER PROG NOTE	• Enter Progress Notes	ENTER PROG NOTE is a **specialty path** Business Function that, when paired with the CASE/PERS SRCH BF, allows a worker to create, view or maintain progress notes in stages assigned to any worker in their district. The worker with this Business Function and no role in the case can access, create and/or modify progress notes but does not have access to	It is recommended that this BF be given to clerical or other workers responsible for entering progress notes for other staff but with no need for full access to the stage. To create notes, a worker must be: • assigned a role in the stage **or**	The following workers can create and modify Progress Notes _without_ being assigned the ENTER PROG NOTE Business Function: • Workers assigned a role in the stage • Any worker who can access the workload of a worker with a role in the stage through unit hierarchy **or** • Any worker who can access the workload of a worker with a role in the stage as a result of Agency Access settings.

Business Function	Security Attributes	Description	Recommendations	Comments
		other information within that Family Services Stage.	• assigned the ENTER PROG NOTE Business Function **or** • assigned a Progress Notes Task To-Do. To modify notes, a worker must be: • the Author of the progress note **or** • the Entered By person for the progress note.	REMINDER: Use of AGENCY ACCESS settings may allow a worker with the ENTER PROG NOTE BF to access more than just the Progress Note window if they are: • Case Assignable • a Unit Approver • in a Supervisory Unit in the Organizational Hierarchy • have been assigned a Job Type
FAD CASEWORKER	• Access All in District • Case Search • Person Search • Maintain Closed Person Demographics • Maintain Home • Maintain Resources • View Contracts	This Business Function is a **bundle** (grouping) of Security Attributes recommended for Foster and Adoptive home Development (FAD) workers, homefinders and other staff responsible for opening and maintaining foster homes.	If this bundle is assigned, do not assign the same attributes as individual functions. Workers should not be assigned the same access in multiple ways.	The FAD Caseworker Business Function can only be assigned as an all-or-none group of attributes. If a district does not wish to assign all the Security Attributes in this bundle, the desired ones must be assigned individually. Refer to the individual Business Function listings for details on how each Security Attribute works.
FAD SUPERVISOR	• Access All in District • Case Search • Person Search • Maintain Closed Person Demographics • Maintain Home	This Business Function is a **bundle** (grouping) of Security Attributes recommended for assignment to a Foster and Adoptive home Development (FAD) Supervisors or others responsible for approving foster home certification/licensing and other FAD changes.	If this bundle is assigned, do not assign the same attributes as individual functions. Workers should not be assigned the same access in multiple ways.	The FAD Supervisor Business Function can only be assigned as an all-or-none group of attributes. If a district does not wish to assign all the Security Attributes in this bundle, the desired ones must be assigned individually. Refer to the individual Business Function listings for details on how each Security Attribute works. A worker assigned the FAD SUPERVISOR bundle should not also

Business Function	Security Attributes	Description	Recommendations	Comments
	• Maintain Home History • Maintain Resources • Case Merge/Split • Person Merge/Split • Remove Person - Added in Error • Unit Summary Access • View Contracts • View Security			be assigned the FAD CASEWORKER bundle as all attributes in that bundle are included in the FAD SUPERVISOR bundle.
FC CPS NOTICES	• View Foster Care Notifications	This Business Function allows the assigned worker access to the Foster Care Notification link on the Search/Maintain menu to view • a listing of open foster homes in their county that are involved in a current CPS INT, INV or FAR stage **and** • a listing of children in the district's custody who are placed in the foster home of a person involved in a CPS Intake, Investigation, or FAR stage, whether or not the child is a subject child in the report.	Each district should assign this BF to one or more workers tasked with monitoring whether children in their custody are in foster homes where a foster parent is involved in a CPS Intake, Investigation or FAR stage. It is recommended that this window be checked each business day, so the district is aware of any new reports involving children in their custody.	Workers must be assigned this BF for the Foster Care Notification link to display on the Search/Maintain menu. When a district worker accesses the Foster Care Notification window, the search will return only those homes certified/approved by their district, and those where their district has an open FSS for the placed child. State and Regional Office workers with the appropriate security will have access to information about all homes and children statewide.

Business Function	Security Attributes	Description	Recommendations	Comments
FILE UPLOAD	• File Upload	This business function allows a worker to upload photos and scanned documents to CONNECTIONS, which can then be linked to a stage, allegation, person (PID), progress note or to the Health module for stages on their workload via the My Uploads process and the Uploads URL.	This BF is appropriate for staff that need to include photos or documents as part of their case documentation. Workers assigned this BF should be cautioned that linking photos/documents to a PID will allow this information to follow the person throughout history and be accessible to workers in the future.	Workers without this BF may access the URL but will not be able to upload photos or documents into CONNECTIONS. Up to ten files can be uploaded at a time. Photos and documents to be uploaded must be less than 95 mb in size. *See 19-OCFS-ADM-13 for programmatic direction on this functionality.*
INITIATE PLACEMENT	• Initiate Placement	This Business Function allows a worker without a role in a stage to initiate a request for placement. Workers with this BF can modify information in the following fields on the Placement window: • *Children Needing Placement* • *Requested Placement Date* • *Request Status* • *Placement Worker Assigned* • *Critical Address Information* • *Comments* Other information on the Placement window displays as read-only. Additional business functions are needed to	This BF provides specialty path access for workers responsible for initiating a placement request but who do not have a role in or workload access to the stage containing the child(ren) to be placed. **This BF is not needed by workers with workload access** as they can initiate a placement request by using the Placement link in the left navigation pane of their workload window. When accessed through the Placement link on a worker's workload, the following fields can be modified: • *Children Needing Placement*	Workers with this BF gain access to the Placement window in one of two ways: • If the worker is also assigned the CASE/PERS SRCH BF, they can use the Person or Case link on the Search/Maintain menu to search for and locate the open stage (INV, FSI, FSS) containing the child(ren) requiring placement and click the Placement link in the Specialty Path section of the left navigation pane to access the Placement window. **or** • If the worker is also assigned the PLACE DASH BF, they can use the Placement link on the Search/Maintain menu to access the Placement Dashboard and initiate a "New Using" of an existing placement request for the family.

Business Function	Security Attributes	Description	Recommendations	Comments
		process the placement request further.	• *Requested Placement Date* • *Critical Address Information* • *Comments*	
MAINT ACTIVITY	• Maint Activity	This Business Function allows a worker to access, view and modify information in the Activities module for all children for whom the WMS case resides within the district via the Activities link on the Search/Maintain menu.	It is recommended that this BF be assigned to staff responsible for opening and closing Activities tracks, and for recording Legal, Movement, Candidacy, Placement and Adoption codes in Activities.	Due to the potential financial impact of Activities entries, **this BF can only be assigned by a worker with the ASG MN ACTIVITY BF.** Only staff assigned ASG MN ACTIVITY or MAINT ACTIVITY BFs will see the MAINT ACTIVITY BF displayed in the list of Business Functions on the Staff/Security window. The Activities link on the Search/Maintain menu displays for all workers. Only district or state workers may enter an M910 Initial Placement or an M999 Close Track code; voluntary agency workers cannot. When an *A599 – Child Was Legally Adopted* code exists, information may be viewed and/or maintained in Activities up to and including 60 days after the entry of the A599 by the following workers: • those assigned the VIEW ACTIVITY BF • those assigned the MAINT ACTIVITY BF • those with a role in the open FSS. To access Activities information beyond 60 days, the ACC SEALED ADOP BF is also required.

Business Function	Security Attributes	Description	Recommendations	Comments
				Once an FSS is closed, only workers with the VIEW ACTIVITIES or MAINT ACTIVITIES BF will be able to access Activities information.

MAINT AGY ACC	• Maintain Agency Access	Agency Access settings allow the granting of access to categories of workers. View, Maintain or no access cam be granted to:
		
		• Staff marked as Case Assignable
		
		  o All within District **or**
		
		  o All Within Unit **or**
		
		  o All within Same Job Type
		
		• Unit Approvers
		
		  o All Within District **or**
		
		  o All Within Same Unit Specialization
		
		• Direct Supervisory Line *
		
		  o All Staff **or**
		
		  o All Non-Clerical Staff
		
		***Note**: Direct Supervisory Line is established using a unit hierarchy created with the Organizational Hierarchy settings. Workers must have MAIN ORG HIER BF to create this hierarchy.
			This is a very powerful Business Function that can allow a great deal of access to a large number of workers.
			
			It is recommended that this Business Function be assigned to the Security Coordinator and Back-up Security Coordinator only if the District will be employing this type of security strategy and the proper use of these settings is understood.
			
			Not all districts will find use of Agency Access settings necessary or beneficial.
				This business function can only be assigned by OCFS.
				
				See the Security page of the CONNECTIONS website for information on how to request this Business Function.
				
				Agency Access settings only permit access to FSI and FSS stages; they **do not** grant access to CPS, FAR or FAD stages.
				
				The Agency Access link only displays on the Search/Maintain menu if a worker has been assigned either the MAINT AGY ACCESS or VIEW AGY ACC Business Function.
				
				Only staff with the MAINT AGY ACC BF will see the MAINT ACTIVITY BF displayed in the list of Business Functions on the Staff/Security window.
				
				See the CONNECTIONS Security Tip Sheet *Organizational Hierarchy & Agency Access* for more information on this security feature.

MAINT APP REG	• Maintain App Reg	This Business Function allows a worker to initiate the application registration	The MAINT APP REG BF is recommended for workers, such as	This BF is available to district and state workers only.

Business Function	Security Attributes	Description	Recommendations	Comments
		process in WMS ("App-Reg") for child welfare services cases open in CONNECTIONS. This BF can be assigned to workers whether or not they have a role in the stage.	eligibility workers, who are approved by their district to open a WMS Services Case from a CONNECTIONS Family Services Stage (FSS).	For Family Services stages, the worker with this BF must also: • be assigned a role in the stage, **or** • have access to the workload of a worker with a role in the stage through unit hierarchy. • have access to the workload of a worker with a role in the stage through Agency Access settings. For FAR stages, the worker with this BF must: • be the Primary worker **or** • have access to the workload of the Primary worker via unit hierarchy.
MAINT CLSD INV	• Maintain Closed Investigation	This Business Function allows a district worker access to the Local Data Maintenance window in a closed investigation (INV) stage so that modifications can be made in the following types of information: • Person Demographics • Add/Relate Person • Allegations • Investigation Conclusions	Only designated Child Protective Services staff with a unit role of Supervisor or above (Supervisor, Maintainer or Manager) should be assigned this function. Using this function causes changes in closed cases and can change the results that are returned in person search when a new CPS intake report is received.	**Maintain Closed Investigation is a corrective process only.** It is to be used *exclusively* to correct errors or oversights in the original investigation. The original investigation narrative must support these corrections. *Maintain Closed Investigation should not be used to record new information about an investigation that is learned after the investigation is closed.* For more information see the *CONNECTIONS tip sheet on Local Data Maintenance.* Maintain Closed Investigation will be enabled only if the following requirements are met: • The worker must have the MAINT CLSD INV BF, **and**

Business Function	Security Attributes	Description	Recommendations	Comments
				• The Investigation Stage (CPS or IAB) must be closed; **and**
				• The worker must have a role in the unit of Supervisor, Maintainer or Manger; **and**
				• The worker must be from the same district as the primary worker when the stage was closed; **and**
				• The closed stage cannot be associated with any open ARI stage.
MAINT CLSD PERS	• Maintain Closed Person Demographics	This Business Function provides a worker from the same district as the Primary worker at the time of stage closure with access to the Local Data Maintenance (LDM) window so that Person Demographics on a closed CPS or FAD stage can be maintained. LDM is used to correct demographic information due to an error in data entry in an original investigation or due to the availability of additional information or a change in information, such as a change in address for an adoption subsidy recipient	Only designated FAD or CPS supervisors or staff should be given this function. Because of the potential for an effect on other cases, it should only be assigned to staff that are knowledgeable about the process.	**LDM is a corrective process only.** A worker can maintain person demographics in a closed FAD or CPS stage only if they are assigned the MAINT CLSD PERS BF **and** • The FAD or CPS stage is closed. • The person whose demographics are to be changed is not associated with any open, non-ARI stage. • The worker is from the same district as the Primary worker when the stage was closed **and** • The closed stage is not associated with any open ARI stage, **or** • The worker is Primary worker of the associated open ARI stages.
MAINT CONTRACTS	• Maintain Contracts	This Business Function allows a worker to: • enter and maintain contracts in CONNECTIONS	This BF should be assigned to local district accounting staff and other staff responsible for maintaining contracts.	For a voluntary agency's foster care resources to return as part of a district's multifacility search in the Placement Module, an active, signed contract with

Business Function	Security Attributes	Description	Recommendations	Comments
		between their district and foster care agencies • view all contracts in CONNECTIONS statewide	Workers must be assigned this BF **AND** the SIGN CONTRACTS BF to enter an active contract in CONNECTIONS.	that agency must exist in CONNECTIONS. Exact searches can be conducted without an active, signed contract pre-existing in CONNECTIONS, but a contract with an agency should be entered as soon as a signed contract is received.
MAINT DESIGNEES	• Maintain Designees	A worker with this Business Function is able to create a Designee, that is, to assign their Business Function Profile (CONNECTIONS access) to another worker in their district for a specified period of time. The assignment of a Designee is intended to allow work processes, such as approvals or assignment of cases, to continue during a planned, limited duration absence, such as a vacation or medical leave, of the person who normally performs these tasks.	A Designee is **not** needed if access for the intended Designee is already available through unit hierarchy or Agency Access settings. Caution should be used as a designee inherits **ALL** security access (all unit access, business function access, Agency Access, and Organizational Hierarchy access) from the Assignee (person temporarily "lending" their access).	Staff with the MAINT SECURITY Business Function can assign designees to any staff within their district without the MAINT DESIGNEES Business Function. See the CONNECTIONS Security Tip Sheet *Understanding Designees & Assignees* for more information on this security feature.
MAINT EDUCATION	• Enter Education	The MAINT EDUCATION Business Function is a specialty path function that, when paired with the CASE/PERS SRCH BF, permits a clerical or other worker to view and/or update Education information for any child in a Family Service Stage assigned to any worker in their district.	It is recommended that this BF be given to school, clerical or other staff responsible for entering education information, but with no need for full access to the stage.	Workers with a role in a stage do not need to be assigned the MAINT EDUCATION BF as they have access to the Education window by virtue of their role. Education information cannot be changed once a stage is pending closure or is closed. REMINDER: Use of AGENCY ACCESS settings may allow a worker with the MAINT EDUCATION BF to access

Business Function	Security Attributes	Description	Recommendations	Comments
		The worker with this Business Function and no role in the stage can maintain education information but does not have access to other information within the Family Services Stage.		more than just the Education window if they are: • Case Assignable • a Unit Approver • in a Supervisory Unit in the Organizational Hierarchy • have been assigned a Job Type
MAINT FAD	• Maintain Home	This Business Function allows workers: • access to the F/A Home link on the either the Intakes or the Search/Maintain menu to create a new foster/adoptive home. • to perform statewide searches and to add a FAD home to the Resource Directory.	MAINT FAD should be assigned to staff, such as homefinders, who will be developing foster/adoptive homes, relative foster homes and adoption subsidy or KinGAP subsidy FAD stages. CPS workers who develop expedited relative homes should also be assigned this Business Function.	Staff without an assigned role in a FAD stage or access to the worker's workload via unit hierarchy, will have read-only access to basic home information. This business function is included in the FAD CASEWORKER and FAD SUPERVISOR bundles and should not be individually assigned if the worker has been assigned one of these bundles. REMINDER: Agency Access settings do not grant access to FAD stages. They only apply to FSI and FSS stages.
MAINT FAD HIST	• Maintain Home History	This Business Function allows a worker to change authorization dates and/or status information of foster, adoption/guardianship and congregate care home/facilities on the FAD Home History Detail window.	Because this BF allows workers to change the history of a foster home, it is recommended that MAINT FAD HIST be selectively assigned to a subset of workers, such as supervisors, who have the MAINT FAD BF and are knowledgeable about the implications.	The Home History Detail window is available in modify mode only through the workload; therefore, a staff person needs **BOTH** this Business Function and either a role in the stage or access to the worker's workload via unit hierarchy. This business function is included in the FAD SUPERVISOR bundle and should not be individually assigned if the worker has been assigned that bundle. REMINDER: Agency Access settings do not grant access to FAD stages. They only apply to FSI and FSS stages.

Business Function	Security Attributes	Description	Recommendations	Comments
MAINT HEALTH	• Maintain Health	The MAINT HEALTH Business Function is a specialty path function that, when paired with the CASE/PERS SRCH BF, permits staff to access, view and/or update Health information for any child in a Family Service Stage (FSS) where the district has a role of Case Manager (CM) or Case Worker Monitor (CWM). For FSSs where the district has a role of Case Planner (CP) or Case Worker (CW) (but not CM or CWM), the district must also have been designated as having health responsibility for the child. A worker with the MAINT HEALTH BF and no assigned role in the stage can maintain health information but does not have access to other information within the Family Services Stage unless additional access has also been granted.	It is recommended that MAINT HEALTH be given to staff responsible for documenting/updating health information and maintaining the medical history for all children in the district; such as a nurse, care coordinator or other health care professional, who does not need for full access to the stage. *Refer to the CONNECTIONS Build 18.9.1 Health Services Job Aid for further detail.*	**Workers assigned a role in the FSS typically do not need to be assigned the MAINT HEALTH BF** as they are granted maintain access to the Health window by virtue of their role in the stage as a Case Manager, Case Planner or Case Worker Monitor. Workers with access to the workloads of these workers via unit hierarchy will also have access to maintain health information for all children in the stage without being assigned the MAINT HEALTH BF. Without the MAINT HEALTH BF, district workers with the role of Case Worker, or those with unit hierarchy access to their workload, can view and maintain health information only for children for whom the district has been designated as responsible. District workers with a role of Case Manger (CM) or Case Planner (CP) or those with access to their workloads via unit hierarchy can **designate health responsibility** for a child to the district/agency of other workers assigned a role in the stage. **Agency Access and Organizational Hierarchy paths do NOT grant access to the health module.** *Additional Access Rules for Open Stages:* • Workers with the MAINT HEALTH BF in the same district as the Case Manager or CPS Worker Monitor but *without* a role in the stage can maintain health information for all tracked children in the stage.

Business Function	Security Attributes	Description	Recommendations	Comments
				• Workers with the MAINT HEALTH BF in the same district as the Case Planner or Case Worker but *without* a role in the stage can only maintain health information for children for whom the district has been designated as having health responsibility.
				• Workers with the MAINT HEALTH BF in the same district as the Case Worker but *without* a role in the stage may also view health information in open stages, for any child for whom their district was previously responsible, though they will only view that information up to the time their responsibility ended.
				Access Rules for Closed Stages:
				• Workers with the MAINT HEALTH BF in the district of the Case Manager or CPS Worker Monitor may view or maintain health information for all tracked children in the stage.
				• Workers with the MAINT HEALTH BF assigned at the time of stage closure in the district of the Case Planner may view or maintain health information for all tracked children in the stage.
				• Workers with the MAINT HEALTH BF assigned at the time of stage closure in the district of the Case Worker may view or maintain health information for children for whom their district was designated responsible.
				• Staff with the MAINT HEALTH BF in the same district as a worker with a

Business Function	Security Attributes	Description	Recommendations	Comments
				role of Case Worker whose district was unassigned prior to the stage closure may not view or maintain any health information.
MAINT ON-CALL	• Maintain On-Call	This Business Function allows a worker to: • maintain the on-call window for their district • view on-call information for all counties statewide	It is recommended that this BF be assigned to multiple individuals since up-to-date, accurate information is imperative for the timely assignment of SCR reports.	The On-Call link on the Search/Maintain menu only displays for all workers assigned this BF. All district workers assigned this BF will receive email notifications (one per day) if the on-call schedule is due to expire in seven days or less.
MAINT ORG HIER	• Maintain Organizational Hierarchy	This Business Function allows the Security Coordinator or Back-up Security Coordinator to arrange District units into a hierarchical structure. When used in conjunction with Direct Supervisory Line Agency Access settings, this grants full access to a worker's To-Dos and to FSI and FSS stages on their workload to anyone in the district whose unit is positioned in a direct supervisory line above that worker's unit. **This functionality applies only to FSI and FSS stages**; it does not grant access to CPS, FAR or FAD stages. Creating an Organizational Hierarchy, without use of Agency Access Direct	**This powerful Business Function can be used to allow a great deal of access to a large number of workers throughout a district's hierarchy.** It is most useful for districts where staff, such as higher-level administrators need access to services cases in numerous subordinate units. This Business Function should be assigned to the Security Coordinator and Back-up Security Coordinator **only if the District will be employing this type of security strategy** and the proper use of these settings is understood.	**This business function can only be assigned by OCFS.** *See the* Security page of the CONNECTIONS website *(www.ocfs.state.ny.us/connect/security/)* for information on how to request this Business Function. While CONNECTIONS allows all units in a district to be configured into an Organizational Hierarchy, it only grants access to FSI and FSS stages; it does not grant access to CPS, FAR or FAD stages. Thus, only *part* of a worker's workload may be seen if the worker caries a mixed caseload of CPS and/or FAD plus services stages. The MAINT ORG HIER BF is only visible on the list of Business Functions in the Security tab to those that have this BF assigned. The Org Hierarchy link on the Search/Maintain Menu displays only for workers who have been assigned either the MAINT ORG HIER or VIEW ORG HIER Business Function.

Business Function	Security Attributes	Description	Recommendations	Comments
		Supervisory Line settings confers no additional access.	*Not all districts will find use of the Organizational Hierarchy strategy necessary or beneficial.*	See the CONNECTIONS Security Tip Sheet *Organizational Hierarchy & Agency Access* for more information on this security feature.
MAINT PLACE	• Maintain Placement	This Business Function allows a worker to initiate a placement request and complete all the fields on the main Placement window, except for the Placement Worker Assigned field (which, if needed, requires either the ASSIGN PLACE or INITIATE PLACE BF). A worker with the MAINT PLACE BF can complete or modify the following fields: • *Children Needing Placement* • *Requested Placement Date* • *Request Status* • *Critical Address Information* • *Resource Search Parameters* • *Comments* In addition, the worker with this BF can modify information in the following windows via links in the left navigation pane: • Child Characteristics • Special Restrictions • Priority Criteria	This BF should be assigned to workers responsible for initiating a placement request and completing all information up to the point of searching for a suitable placement.	Workers with this BF cannot execute a search or place a child with a resource without also being assigned the SEARCH PLACE BF.

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Business Function	Security Attributes	Description	Recommendations	Comments
		• Placement Evaluation		
MAINT REPD ERR (Maintain Reported in Error)	• Maintain Person Role	This Business Function allows a worker to change a person's role in a CPS investigation stage to Reported in Error. A person should only be marked as Reported in Error when they do not fall under the definition of a subject or other person named in the report (SSL 412), and/or clearly should not have been included in the intake report.	Since the need to perform this function occurs infrequently, it should only be assigned to workers who are knowledgeable about the process and impacts of the Maintain Reported in Error functionality.	*Refer to CONNECTIONS Step by Step Guide: Data Maintenance for CPS Workers* for a comprehensive description of the Remove Person in Error process.
MAINT RESOURCES	• Maintain Resources	This Business Function allows a worker to add and modify information in the Resource Directory for the following types of resources: • providers • non- FAD facilities • law enforcement • hotlines/helplines • schools	This BF should be assigned to workers responsible for maintaining information in the Resource Directory for their district. This business function is NOT needed by staff responsible for creating new foster homes.	New foster homes are created and added to the Resource Directory by workers with the MAINT FAD BF or with the FAD CASEWORKER or FAD SUPERVISOR bundle, which contains that BF. Workers with the Maintain Resources BF can modify information for resources within their jurisdiction. State workers with the Super-Worker security attribute can modify information for any Resource.
MAINT SECURITY	• Maintain Security • View Business Functions	This Business Function allows a worker to: • assign/unassign Business Functions to all staff within their district. • assign/unassign Job Types (used with Agency	This **powerful**, core Business Function should be assigned to the CONNECTIONS Security Coordinator and Backup Security Coordinator. Large districts with multiple sites may wish to	The Security Coordinator or other worker with this BF can assign the MAINT SECURITY BF or any other BF to themselves or others except those BFs which require assignment from OCFS (ASG MAINT ACTIVITY, DIR ACTIVITY ENTRY, MAINT AGY ACC, MAINT ORG HIER).

Business Function	Security Attributes	Description	Recommendations	Comments
		Access settings) to any staff within their district • assign one individual's Business Function Profile to another individual in their district for a designated period of time (create a Designee) • designate which placement notification email(s) a worker will receive	assign this Business Function to at least one individual at each site, keeping in mind that workers with MAINT SECURITY are able to modify information for all staff at all sites in their district.	
VIEW SENS DASH	• View Sensitive Dashboard	This Business Function controls access on the Placement Dashboard to placement requests created from cases marked as sensitive. Users with access to the Placement Dashboard (having the PLACE DASH BF) but without VIEW SENS DASH will see placement requests generated from within sensitive cases on the Request for Placement Services grid, but information in the Stage Name and Stage ID columns will be masked. The New Using button will also be disabled. Details will be hidden, a system status message displayed instead: "You do not have the proper	This BF should be assigned to staff responsible for processing placement requests that originate from stages marked as sensitive.	The BF also controls access to detailed information on the Placement Resource Roster. If the user does not have the BF, and the generated report displays a child who was placed from a placement request initiated in a sensitive case, the child's name will display as "occupied," and the child's PID will display blank.

Business Function	Security Attributes	Description	Recommendations	Comments
		security to view the selected request."		
MAINTAIN OFFICE	• Maintain Office	This Business Function allows a worker to add, modify and delete office sites for their district.	This BF is used infrequently and can be assigned to the Security Coordinator and Back-Up Security Coordinator on an as-needed basis.	The Security Coordinator or other workers with this Business Function can modify information for all offices in their district. All workers have view access to office information through the Office link on the Search/Maintain menu. Searches default to the worker's own district but can be changed. An Agency Code and/or additional information is required to search for information about other districts/agencies.
MAINTAIN STAFF	• Maintain Staff	This Business Function allows workers to: • add, modify, and delete staff information for workers in their district • mark staff as case assignable. • end-date staff in CONNECTIONS • enter/update WMS ID agency/unit/worker information when a worker moves between units. • specify a Category for a worker (which displays as the Job Class on the Staff List) • enter/update the CCRS ID agency/unit/worker information when a	This BF should be assigned to the Security Coordinator and Back-Up Security Coordinator. Some districts may also want to assign this Business Function to unit supervisors so they can end-date staff in CONNECTIONS who have left the district once the departing worker's workload and To-Dos are empty.	The Security Coordinator or other workers with the MAINTAIN STAFF BF can modify information for all staff in their district. All workers have view access to staff information through the Staff/Security link on the Search/Maintain menu without being assigned this business function. Searches default to the worker's own district but can be changed by entering the correct Agency Code for another district or agency.

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Business Function	Security Attributes	Description	Recommendations	Comments
		worker moves between units.		
MAINTAIN UNIT	• Maintain Unit	This Business Function allows a worker to manage all units in their district by: • creating, renaming, and deleting units • assigning/changing Unit Approvers • adding workers to and deleting workers from units • establishing access through unit hierarchy & role	This BF should be assigned to the CONNECTIONS Security Coordinator, Back-Up Security Coordinator, and other staff (if any) responsible for moving staff into, out of and between units.	The MAINT UNIT BF is needed to move new staff from the Conversion Units created when workers are added to CONNECTIONS and to delete those Conversion Units (e.g. N01, N02). All workers have view access to unit information through the Unit link on the Search/Maintain menu without being assigned this business function. See the CONNECTIONS Security Tip *Sheet Working with Units* for more information on moving staff into the correct unit and deleting Conversion units.
MARK SENSITIVE	• Mark Sensitive Case	This Business Function allows a worker to designate a case as "sensitive" or remove to the designation from a case that has been already marked as such. Stages marked as sensitive display with a red exclamation point next to the stage name.	This BF should be assigned to select staff responsible for deciding which cases need an extra layer of security. Cases should be marked "sensitive" if • they are high profile community cases, • involve persons reported to the SCR who are employed by the district, the SCR or OCFS or • involve persons known to local CPS staff from	Marking one stage in a case as sensitive marks all open stages in the same case (having the same case number) as sensitive. This business function is contained in the CPS SUP and CPS SUP Limited bundles. Workers assigned one of these bundles do not also need this BF assigned individually. Marking an FSI as sensitive does not require the MARK SENSITIVE BF If done from the assigned worker's workload,

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Business Function	Security Attributes	Description	Recommendations	Comments
			an arena outside the scope of employment. Comments should be entered to explain why the stage is being marked as sensitive so that future workers can reasonably evaluate if/when the designation should be ended.	
MERGE/SPLIT	• Person Merge/Split • Case Merge/Split	The Merge/Split Business Function is a **powerful** function that allows a worker to: • Merge person identification numbers (PIDs) when the same individual is known to the CONNECTIONS database by more than one PID. • Merge case numbers when there are subsequent CPS reports and when new case information needs to be associated with a previously established case number. • Split persons or cases that were previously merged.	Due to the potential for incorrect person merges to distort a person's history in the system, local discretion should be used in assigning this BF. While the need to perform merges occurs regularly, this BF should only be assigned to staff who are well trained and knowledgeable about the process and its.	The ability to merge and split case and/or person information helps keep an individual's history together and to otherwise maintain the integrity of the data within CONNECTIONS. **The splitting process for PIDs does not simply reverse the effects of a merge.** Additional Local Data Maintenance may be required to fully correct the result of a bad merge as the correct PID may need to be manually added back to past stages where it was present prior to an incorrect merge. See the CONNECTIONS website for information on Person Merge/Split training and training materials.
MODIFY CID	• Modify CID	This Business Function allows a worker to modify or correct the Activities Case Initiation Date (CID)	Since a change in Activities CID is an infrequent occurrence, this BF should be selectively assigned to	This BF is only available to district staff. An Activities CID may need to be modified to maintain the continuity of tracking or legal events when a child receiving services in one Family

Business Function	Security Attributes	Description	Recommendations	Comments
		for a child in the Activities module. This function is **NOT** required to change the Case Initiation Date (CID) of a Family Services Stage.	staff responsible for maintaining Activities information.	Services Stage (FSS) moves to another household and begins receiving services under a different FSS. The CID may be modified multiple times and will change the Activities CID for all of the children in the WMS case. See the CONNECTIONS Tip Sheet, *Activities Task Tips*, for further information in the use of this BF.
PERSON UNRELATE	• Person Unrelate	This Business Function allows a worker to unrelate persons who were incorrectly related at intake by the State Central Register (SCR).	It is recommended that this BF be assigned to workers responsible for person maintenance for stages (INV, FAR) that originated with a CPS Intake stage. Because of the potential to effect other cases, the PERSON UNRELATE BF should only be assigned to staff that are knowledgeable about the process and its impacts.	See the *Person Unrelate* tip sheet for a comprehensive description of the Person Unrelate process.
PLACE DASH	• Placement Dashboard	This Business Function grants access to the Placement Dashboard window via the Placement link on the Search/Maintain menu. The Placement Dashboard displays all placement requests for the worker's district. A Worker with this BF is granted read-only access to all information on a	This BF should be assigned to workers • responsible for monitoring and/or maintaining the placement process **and** • responsible for verifying recent placements. All placements must be verified via the Verify Placement window by either the placing agency	District workers accessing the Placement Dashboard will see • all placement requests created from stages in their district • placement requests created from stages outside of the worker's district that have been referred to their district.

Business Function	Security Attributes	Description	Recommendations	Comments
		placement request as well access to the following: • Verify Placement window • Placement Resource Roster report • Resource Availability report	or the receiving agency before codes can be entered in Activities for the placed child(ren). The RESOURCE COORD business function is required to verify the placement.	
RESOURCE ADMIN	• Resource Administrator	This Business Function allows a worker to modify the Resource Characteristics tab for resources within their own agency using the Resource link on the Search/Maintain menu (statewide) or when accessing the Resource Characteristics window from a FAD stage on a worker's workload (for ACS and VAs only). The entry of Resource Characteristics is required to provide the best possible match between children needing placement and available resources through the Placement Module search process.	This Business Function is appropriate for FAD or other staff responsible for recording and updating Resource Characteristics for foster homes licensed/certified by their district.	ACS and Voluntary Agency staff without this BF will have view-only access when using Resource Characteristics link from the workload path. Upstate DSS staff can modify Resource Characteristics through the workload path without this BF.
RESOURCE COOR	• Resource Coordinator	This Business Function, in combination with the PLACE DASH BF, allows workers to view and respond to open placement referrals on the Placement Dashboard This BF is required to:	This BF is intended for district homefinders responsible for monitoring placement requests and accepting or declining referrals.	This BF allows modify access on the Referral Detail window where the referred-to agency can accept or decline pending referrals for placement.

Business Function	Security Attributes	Description	Recommendations	Comments
		• verify a child's arrival at a placement, which sends a pending transaction to the Activities window • withdraw a pending transaction sent in error to the Activities window.		
REM PER ADD ERR	• Remove Person – Added in Error	This Business Function allows a worker to remove persons who were incorrectly added to INV, FAR, ARI, or FAD stages.	It is recommended that the REM PER ADD ERR BF be given to CPS and FAD staff who are responsible for person maintenance and knowledgeable about the process and its impacts. This Business Function is **not** needed by Family Services workers as persons added incorrectly are removed through a different process in FSI stages (deleted) and FSS stages (end-dated).	The REM PER ADD ERR link is accessed through the worker's workload on the Person List window. It is visible to all but enabled only if the worker has been assigned the REM PER ADD ERR BF.
SEARCH PLACE	• Search Placement	This Business Function allows a worker to: • conduct a search for placement resources • create referrals to potential placement resources • monitor referral responses • select a resource	This BF should be assigned to workers who are responsible for searching for and selecting a placement resource for a child based on the information provided in an open placement request.	Workers must have this BF to perform these tasks, whether from a workload path or the Placement Dashboard via the Placement link on the Search/Maintain menu. Searches for initial placements, those involving a change in level of care and transfers between voluntary agencies must be done by a district worker.

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Business Function	Security Attributes	Description	Recommendations	Comments
		• place the child(ren)		
SIGN CONTRACTS	• Sign Contracts	This Business Function allows a district worker to check the Sign Contract checkbox on the contract window to acknowledge that a contract being entered in CONNECTIONS has been signed.	This BF should be assigned to workers responsible for entering contracts in CONNECTIONS.	Workers must have **both** the SIGN CONTRACTS and the MAINT CONTRACTS BF to enter an active contract in CONNECTIONS.
STANDARD ACCESS	• Standard Access	This Business Function is automatically assigned to workers when their accounts are added to CONNECTIONS. STANDARD ACCESS grants a worker access to basic CONNECTIONS functions such as their Workload, To-Do and My Uploads tabs, the Reports tab and to the Activities, Staff/Security, Resource, Office and Unit searches on the Search Maintain menu.	Each CONNECTIONS worker must be assigned at least one Business Function. While this BF is only necessary for workers without other Business Functions, there is no harm is keeping this BF when other BFs are assigned. For some workers, the STANDARD ACCESS BF may provide all the access they need to complete their job duties.	Searches on Staff/Security and Office default to the worker's own district but can be changed. An Agency Code and/or additional information is required to view information about other districts/agencies. Unit searches are limited to units within the worker's own district. A Resource search returns read-only results of basic information.
UNIT SUM ACCESS	• Unit Summary Access	This Business Function, in combination with being the Unit Approver or having a role in the unit above that of the Unit Approver, grants a worker full view and maintain access to the Workloads and To-Dos of all staff within that unit.	It is recommended that the Supervisor (Unit Approver) of each unit be assigned this Business Function. Administrators and those providing supervisory coverage or completing approvals in the absence of a Supervisor should be assigned the UNIT SUM ACCESS BF and be out-	The unit hierarchy access this Business Function conveys gives the same maintain access to information as that of the assigned worker. Unit Hierarchy access can be used for all types of stages (INT, INV, FAR, FAD, FSI, FSS). Agency Access settings only apply to FSI and FSS stages; they do not grant access to CPS, FAR or FAD stages.

Business Function	Security Attributes	Description	Recommendations	Comments
			assigned to the unit in a role above that of the Unit Approver in order to gain access the Supervisor's To-Dos. (e.g., if the Unit Approver has a role of Supervisor, the covering worker would need a role of Maintainer or Manger.)	See the CONNECTIONS Security Tip Sheet *Accessing Someone Else's Workload & To-Do's* for more information on the Unit Summary Access path.
MAINT AWARD/CTI	• Maintain Closed to Intake/CD Awards	This Business Function allows a worker to access and modify information on the CD Borough Award window (NYC/ACS workers only) and the Closed to Intake window	It is recommended that staff responsible for specifying which agencies have been awarded a neighborhood-based service contract or maintain the Closed to Intake status of resources be given this function.

Only designated staff should be given the Closed to Intake function as it causes facilities to no longer be returned in Multi-Facility searches for the agency that closed it to intake. | CD Awards apply to Foster Boarding Homes; Borough Awards apply to agencies that operate Congregate Care Facilities.

A facility closed to intake by an OCFS or ACS worker will not be returned in a Multi-Facility search. |
| VIEW AWARD/CTI | • View Closed to Intake/CD Awards | This Business Function, for NYC/ACS workers only, allows a worker to:

• View the Vacancy Control Closed to Intake window

• View the Vacancy Control CD/Borough Award window | It is recommended that this BF be assigned to workers responsible for placements. | CD Awards apply to Foster Boarding Homes; Borough Awards apply to agencies that operate Congregate Care Facilities.

A facility closed to intake by an OCFS worker will not be returned in a Multi-Facility search. |
| VIEW ACTIVITY | • View Activity | This Business Function grants workers without a role in a Family Services Stage (FSS), view access to Activities window information for children | This BF is recommended for Services Supervisors, Administrators, or others without an assigned role in an FSS who need to view Activities | Workers assigned a role in a Family Services Stage (FSS), do **NOT** need this BF to view Activities information for the children in that stage. They can use the Activities link on the |

Business Function	Security Attributes	Description	Recommendations	Comments
		whose FSS stage county matches that of the county/agency assigned primary responsibility for the child. Workers assigned this BF use the Activities link on the Search/Maintain menu and can search by CIN or WMS Case number to view child-specific information.	information (Legal, Movement, Candidacy, Adoption) for a child in their jurisdiction.	Search/Maintain menu and search by FSS stage number. State workers with the appropriate security will have access to all children statewide.
VIEW ADMIN REV	• View Admin Review	This Business Function allows a worker view-only access to Administrative Review (ARI) stages for cases on their workload, or a workload they can access, via the Implied Role path.	It is recommended that this BF be assigned to all CPS caseworkers, supervisors, and managers.	Administrative Review Stages can only be initiated by the SCR. This business function is contained in the CPS CASEWORKER, CPS SUPERVISOR and CPS SUP LIMITED bundles. Workers assigned one of these bundles do not need to have this BF assigned individually.

VIEW AGY ACC	• View Agency Access	This Business Function grants view-only access to the Agency Access window from the Search/Maintain menu.
		
		Agency Access settings may be used to assign View, Maintain, or no additional access to groups of staff based on the following:
		
		• Staff marked as Case Assignable
		
		  o All within District **or**
		
		  o All Within Unit **or**
			It is recommended that this BF be assigned to Administrators or others needing read-only access to the Agency Access settings.
			
			Security Coordinators or other workers assigned the MAINT AGY ACC Business Function already have view access and do not need this BF.
				Agency Access settings only apply to FSI and FSS stages; they do not grant access to CPS, FAR or FAD stages.
				
				The Agency Access link is only visible on the Search/Maintain Menu if a worker has been assigned the MAINT AGY ACCESS or VIEW AGY ACC Business Function.

Business Function	Security Attributes	Description	Recommendations	Comments
		○ All within Same Job Type • Unit Approvers ○ All Within District **or** ○ All Within Same Unit Specialization • Direct Supervisory Line * ○ All Staff **or** ○ All Non-Clerical Staff *Note: Direct Supervisory Line is established using a unit hierarchy created with the Organizational Hierarchy settings. Workers must have MAIN ORG HIER BF to create this hierarchy.		
VIEW CALL LOG	• View Call Log	This Business Function grants view-only access to the Call Log window, so CPS reports assigned to the district by the SCR can be tracked. **Note: This BF allows view access to incoming cases marked as sensitive.**	It is recommended that this BF be assigned to CPS caseworkers, supervisors, and managers.	This business function is contained in the CPS CASEWORKER, CPS SUPERVISOR and CPS SUP LIMITED bundles. Workers assigned one of these bundles do not need to have this BF assigned individually. Because this allows view access to incoming reports marked as sensitive, some districts prefer not to assign this BF to all caseworkers.
VIEW CLOSED FAR	• View Closed FAR	This Business Function, when paired with the ACCESS ALL DISTRICT BF, allows a worker to view closed FAR stages through the Case Summary path.	It is recommended that this BF be assigned to all CPS caseworkers, supervisors and managers who are responsible for investigative history searches.	The following workers have the ability to view a closed FAR stage and the corresponding INT stage _without_ being assigned the VIEW CLOSED FAR BF: • Workers assigned a role in a currently open FAR stage in the same case (i.e., with the same case number)

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Business Function	Security Attributes	Description	Recommendations	Comments
				• Workers in the unit hierarchy of the Primary worker in a currently open FAR stage in the same case • CPS workers assigned to another open stage in the same case • Workers in the unit hierarchy of a CPS workers assigned to another open stage in the same case To view closed FAR stages marked as sensitive, the worker will also need the VIEW SENSITIVE BF. This business function is contained in the CPS CASEWORKER, CPS SUPERVISOR and CPS SUP LIMITED bundles. Workers assigned one of these bundles do not need to have this BF assigned individually.
VIEW CONTRACTS	• View Contracts	This Business Function allows a worker view-only access to contracts statewide in CONNECTIONS.	This BF should be assigned to Directors of Service and/or administrative staff who may be involved in negotiating or procuring contracts.	To enter or modify contracts for their district, the MAINT CONTRACTS and SIGN CONTRACTS BFs are required.
VIEW HEALTH	• View Health	VIEW HEALTH is a specialty path Business Function which, in combination with the CASE/PERS SRCH BF (or the ACCESS ALL DISTRICT BF which also includes CASE SRCH), allows a worker to view FSS stage health information for all children for which the district either	Recommended for workers such as Administrators who need view-only access to health information on a district wide basis for open or closed Family Services Stages and who, for open stages, does not have either a role in the stage or access via unit hierarchy.	**The following workers can view health information _without_ being assigned the VIEW HEALTH BF:** • Workers assigned a role in the stage of Case Manager, Case Planner or CPS Worker Monitor. • Any worker with access to the workload of the Case Manager or CPS Worker/Monitor through unit hierarchy. • Workers assignee the role of Case Worker (CW) or any worker with

Business Function	Security Attributes	Description	Recommendations	Comments
		has a current role or had a historic one. A worker with this BF and no assigned role can view health information but does not have access to other information within the Family Services Stage unless additional access has been granted.	The BF must be assigned with the ACCESS ALL DISTRICT and CASE/PERS SRCH BFs. Due to the confidential nature of health information, this BF should only be assigned to select staff.	access to the workload of an assigned Case Planner or Case Worker through unit hierarchy **ONLY IF** the district has also been designated as having health responsibility for the child. • Those assigned as Primary or Secondary Investigators in a CPS INV stage open concurrently with an FSS stage may view health information via the implied role path. When accessing other FSS stages via Implied Role, the worker with this BF will have Health access when the person in common is in any open INT, INV or ARI stage on the worker's workload. **Access to health information is NOT grated through Agency Access settings.** _Additional Access Rules for Open Stages:_ • Workers with the VIEW HEALTH BF in the same district as the Case Manager or CPS Worker Monitor but _without_ a role in the stage can view health information for all tracked children in the stage. • Workers with the VIEW HEALTH BF in the same district as the Case Planner or Case Worker but _without_ a role in the stage can only view health information for children for whom the district has been designated as having health responsibility. • Workers with the VIEW HEALTH BF in the same district as the Case

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				Worker but *without* a role in the stage may also view health information in open stages, for any child for whom their district was previously responsible, though they will only view that information up to the time their responsibility ended. *Access Rules for Closed Stages:* • Workers with the VIEW HEALTH BF in the district of the Case Manager or CPS Worker Monitor may view health information for all tracked children in the stage. • Workers with the VIEW HEALTH BF assigned at the time of stage closure in the district of the Case Planner may view health information for all tracked children in the stage. • Workers in the district of the Case Planner whose district had been designated responsible AND who have the VIEW HEALTH Business Function will be able to view health information for the children for whom the CP's district was responsible up until the time either the CP role or health responsibility was unassigned. If the district of the Case Planner was never designated responsible, then NO ONE in that district will be able to view the health information. • Workers with the VIEW HEALTH BF assigned at the time of stage closure in the district of the Case Worker may view health information for children for whom their district was designated responsible.

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				• Staff with the VIEW HEALTH BF in the same district as a worker with a role of Case Worker whose district was unassigned prior to the stage closure may not view any health information. • Staff with the VIEW HEALTH BF in the same district as the worker with a role of Case Worker whose district was unassigned prior to the stage closure may not view any health information.
VIEW INDICATED	• View Indicated	This Business Function allows a worker to view indicated CPS investigations.	It is recommended that this BF be assigned to all CPS caseworkers, supervisors, managers and other workers that the district wishes to have access to indicated investigation stages.	This BF, in combination with the CASE/PERS SRCH BF, will allow basic information to be seen for approved indicated investigations. This business function is contained in the CPS CASEWORKER, CPS SUPERVISOR and CPS SUP LIMITED bundles. Workers assigned one of these bundles do not need to have this BF assigned individually.
VIEW OPEN FAR	• View Open FAR	This Business Function, when paired with the ACCESS ALL DISTRICT BF, allows a worker to view an open FAR stage and the corresponding INT stage through the Case Summary path.	It is recommended that this BF be assigned to all CPS caseworkers, supervisors, and managers who are responsible for investigative history searches.	The following workers can view an open FAR stage and the corresponding INT stage *without* being assigned the VIEW OPEN FAR BF: • Workers assigned a role in the stage, • Workers in the unit hierarchy of the Primary worker, • Workers with a historical role in the FAR stage, • Workers in the unit hierarchy of the Historical Primary worker, • CPS workers assigned to another open stage in the same case,

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				• Workers in the unit hierarchy of a CPS worker assigned to another open stage in the same case,
				• Workers with the role of Case Manager in an open FSS in the same case,
				• Workers in the unit hierarchy of a worker with a role of Case Manager in an open FSS in the same case.
				A worker with the ENTER PROG NOTES BF from the same district as an assigned worker will have access to the Progress Notes window in an open FAR stage but will not have access to other FAR windows or the corresponding INT stage.
				This business function is contained in the CPS CASEWORKER, CPS SUPERVISOR and CPS SUP LIMITED bundles. Workers assigned one of these bundles do not need to have this BF assigned individually.
VIEW ORG HIER	• View Organizational Hierarchy	This Business Function allows a worker to view all units in the organizational hierarchy structure (if any) for their own district via the Org Hierarchy link on the Search/Maintain menu.	It is recommended that this Business Function be assigned to administrators or others who need view access to a district's Organizational Hierarchy structure. Security Coordinators in districts that do not use Organizational Hierarchy as part of their security structure may find this BF useful, as it allows one to see which workers are in- and out- assigned to a	The Org Hierarchy link is only visible on the Search/Maintain Menu if a worker has been assigned either the MAINT ORG HIER or VIEW ORG HIER BF. Security Coordinators or other workers assigned the MAINT ORG HIER BF do not need this BF.

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			given unit in an easy to navigate format.	
VIEW RPTR/ SOURC	• View Reporter/ Source	This Business Function allows a worker to view the reporter/source information for all CPS stages in which they have a role or can otherwise access.	It is recommended that this BF be assigned to all CPS caseworkers, supervisors, and managers who are responsible for assigning intakes and for investigations. Workers assigned on-call duties should also be assigned this BF. In line with best confidentiality practices, only workers needing such access should be assigned this BF.	CPS and FAR Caseworkers cannot see the Reporter/Source information for CPS or FAR stages in their assigned workload without this Business Function. This business function is contained in the CPS CASEWORKER, CPS SUPERVISOR and CPS SUP LIMITED bundles. Workers assigned one of these bundles do not need to have this BF assigned individually.
VIEW SECURITY	• View Security	This Business Function allows a worker to view the Business Functions and Job Types that are assigned to any worker.	***This BF dose not need to be assigned as an individual function as all CONNECTIONS workers are automatically granted this access through use of the Staff/Security link on the Search/Maintain menu.***	Searches on Staff/Security default to the worker's own district but can be changed. An Agency Code is required to view information about workers in other districts/agencies.
VIEW SENSITIVE	• View Sensitive Case	This Business Function grants view access to stages marked as sensitive for workers who do not have an assigned role in the stage. Stages marked as sensitive display on a workload with	It is recommended that this BF be assigned to supervisors, administrators or others who may need to view cases marked as sensitive but who do not have an assigned role.	Workers with an assigned role do **NOT** need this BF to see stages marked as sensitive on their own workloads. Unlike stages not designated as sensitive, supervisors do NOT gain access to information on stages marked as sensitive via the Unit Summary path

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		a red exclamation point (!) next to the stage name.	Due to the nature of sensitive cases, this BF should be assigned selectively. This BF can be assigned temporarily and unassigned if a worker has a short term need to view sensitive cases such as when researching history that contains stages marked as sensitive.	(being the Unit Approver and having the UNIT SUM ACC BF.) This business function is contained in the CPS SUPERVISOR bundle. Workers assigned this bundle do not need to have this BF assigned individually.
VIEW SENS DASH	• View Sensitive Dashboard	The BF controls access to placement request information created from cases marked as sensitive on the Placement Dashboard. Without this BF, users will see placement requests generated from within sensitive cases on the Request for Placement Services grid, but with a masked Stage Name and Stage ID column. The New Using option is not available, details are hidden and message, "You do not have the proper security to view the selected request." displays.	This BF should be assigned to workers who may need to process placement requests originating from cases marked as sensitive. It does not grant access to additional sensitive case information. For that, the VIEW SENSITVE BF is needed.	The BF also controls detailed access to the Placement Resource Roster. If the user does not have the BF, and the generated report displays a child who was placed from a placement request initiated in a sensitive case, the child's name will display as "occupied," and the child's PID will display blank.
VIEW UNDER INV	• View Under Investigation	This Business Function allows a worker to view investigations prior to an approved determination.	It is recommended that this BF be assigned to all CPS caseworkers, supervisors, and managers and to other	CPS workers do not need this Business Function to maintain INV stages on their own workload or to view under

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		The VIEW UNDER INV BF, in combination with the CASE/PERS SRCH BF allows a worker to view basic information for undetermined investigations from a person or case search.	workers that need access to stages under investigation.	investigation stages via the Implied Role path. The VIEW UNDER INV BF is needed to: • print narratives from a CPS investigation via the Implied Role path. • view open investigation stages assigned to other workers from a case or person search • access the Intake Narrative of an in-process investigation from a case or person search. This business function is contained in the CPS CASEWORKER, CPS SUPERVISOR and CPS SUP LIMITED bundles. Workers assigned one of these bundles do not need to have this BF assigned individually.
VIEW UNFOUNDED	• View Unfounded	This Business Function allows a district worker view access through the Implied Role path to information in unfounded stages for individuals on their workload or a workload they can access. The VIEW UNFOUNDED BF, in combination with the CASE/PERS SRCH BF allows a worker to view information in unfounded reports via a person or case search.	It is recommended that this BF be assigned to all CPS caseworkers, supervisors, and managers who are responsible for investigative history searches.	This business function is contained in the CPS CASEWORKER, CPS SUPERVISOR and CPS SUP LIMITED bundles. Workers assigned one of these bundles do not need to have this BF assigned individually.