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 agency. 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 voluntary agency 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, 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
ACC SEALED ADOP	• Access Sealed Adoption	The ACC SEALED ADOP Business Function allows a worker to access a closed Child Case Record (CCR) type Family Services Stage (FSS) that has been sealed due to the finalization of the child's adoption for those cases in which the VA worker had a role in the stage prior to finalization and those in the unit hierarchy of the worker. An adoption is sealed once the Finalize Adoption window is completed by the district Case Manager and saved. The CCR stage can then remain open or be closed. *If the CCR Stage Remains Open:* • 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:*	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 sure that it is only assigned to those whose job duties require it.	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
		• Workers must have the ACC SEALED ADOP BF plus historical access (historical worker, or in that worker's unit hierarchy at the time) 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.		
ACC SERPLAN REV	• Access Service Plan Review	ACC SERPLAN REV is a specialty path business function, when paired with the CASE SEARCH or PERSON SEARCH BF, allows a worker to access only the Service Plan Review windows for any Family Services Stage (FSS) assigned to a worker in their agency. 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.	It is recommended that this BF be assigned to 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.	The following workers can create and modify Service Plan 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

Business Function	Security Attributes	Description	Recommendations	Comments
				• in a Supervisory Unit in the Organizational Hierarchy • have been assigned a Job Type *See the MAINT AGY ACC BF description for a description of AGENCY ACCESS settings.*
ACCESS ALL AGY	• 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 agency when accessed via a case search. To search by a person's name, the PERSON SEARCH BF is also required. 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 agency.	The agency of the case includes the agency of the current Primary worker, Secondary worker(s), Case Planner or Case Worker(s) on a stage. The historical agency of the case includes the agency of the worker(s) on a stage at the time of closing.
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, agencies must request assignment of the ASG MN ACTIVITY Business Function from OCFS. The BF may be assigned to either the Security Coordinator or a	**This business function can only be assigned by OCFS.** Only Voluntary Agencies that work with NYC will need this BF. 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

Business Function	Security Attributes	Description	Recommendations	Comments
			manager with the MAINT SECURITY BF.	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 agencies 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 agencies will need to assign this BF.
CASE SEARCH	• Case Search	This Business Function allows a worker to perform statewide searches by Case ID, Stage ID, Case Name, or District and WMS Case #. 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, such as those using the **specialty path** with BFs such as ACC SERPLAN REV, ENTER PROG NOTE, MAINT EDUCATION, MAINT HEALTH or VIEW HEATH.	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 search will return the following basic information: • Case Name • Stage Status • Case ID • District/Agency • Zone • Case Type • Last assigned worker

Business Function	Security Attributes	Description	Recommendations	Comments
				• Worker's Phone #
				• Case Composition details
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, including those for youth who have stepped down from an OCFS facility to placement at a voluntary agency.	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 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. |
| ENTER PROG NOTE | • Enter Progress Notes | ENTER PROG NOTE is a **specialty path** Business Function that, when paired with the CASE SEARCH or PERSON SEARCH BF, allows a worker to create, | It is recommended that this BF be given to clerical or other workers responsible for entering progress notes for other | 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 |

Business Function	Security Attributes	Description	Recommendations	Comments
		view or maintain progress notes in stages assigned to any worker in their agency. 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 other information within that Family Services Stage.	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** • 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.	• 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. 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 *See the MAINT AGY ACC BF description for a description of AGENCY ACCESS settings.*
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 for their own agency where a foster parent is named as a subject in a current CPS INT, INV or FAR stage **and**	Each agency should assign this BF to one or more workers tasked with monitoring whether children in their care 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 agency is aware of	Workers must be assigned this BF for the Foster Care Notification link to display on the Search/Maintain menu. When an agency worker accesses the Foster Care Notification window, the search will return only those homes certified/approved by their agency, and those where their agency 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
		• a listing of children in the agency's care 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.	any new reports involving children in their care.	
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, person (PID), progress note or to the Health module for stages on their workload via the My Uploads process and the Uploads URL. District workers have the ability to link an uploaded document to an Allegation also.	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*	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	Workers with this BF gain access to the Placement window in one of two ways: • If the worker is also assigned the CASE SEARCH or PERSON SEARCH BF, they can use the Person or Case link on the Search/Maintain menu to search for and locate the open stage (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.

Business Function	Security Attributes	Description	Recommendations	Comments
		• *Placement Worker Assigned* • *Critical Address Information* • *Comments* Other information on the Placement window displays as read-only. Additional business functions are needed to process the placement request further.	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* • *Requested Placement Date* • *Critical Address Information* • *Comments*	**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.
MAINT ACTIVITY	• Maint Activity	This Business Function allows a worker to access, view and modify information in the Activities module via the Activities link on the Search/Maintain menu for all children for whom the WMS case resides within the agency. Only Voluntary agencies doing business with ACS can be assigned this BF. All Activities entries for upstate voluntary agencies are done by the local districts.	It is recommended that this BF be assigned to staff responsible for recording codes in Activities. Voluntary agency workers cannot open an Activity track or enter the following codes: • M910 CHILD PLACED • M999 CHILD'S TRACK CLOSED • S200 – CHILDS LEVEL OF DIFFICULTY if the change is for an increase in LOD	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. 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

Business Function	Security Attributes	Description	Recommendations	Comments
				• 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. 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 (Agency) **or**
		
		   o All Within Unit **or**
		
		   o All within Same Job Type
		
		• Unit Approvers
		
		   o All Within District (Agency) **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
			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 Agency will be employing this type of security strategy and the proper use of these settings is understood.
			
			Not all agencies 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 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.

Business Function	Security Attributes	Description	Recommendations	Comments
		a unit hierarchy created with the Organizational Hierarchy settings. Workers must have MAIN ORG HIER BF to create this hierarchy.		
MAINT CLSD PERS	• Maintain Closed Person Demographics	This Business Function provides a worker from the same agency 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 FAD stage can be maintained. Closed person demographics may need to change in situations such as a change in address for an adoption subsidy recipient	Only designated FAD 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.	A worker can maintain person demographics in a closed FAD stage only if they are assigned the MAINT CLSD PERS BF **and** • The FAD stage is closed. • The person whose demographics are to be changed is not associated with any open stage (other than an Administrative Review stage). • The worker is from the same agency as the Primary worker when the stage was closed.
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 agency 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	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	Staff with the MAINT SECURITY Business Function can assign designees to any staff within their agency without the MAINT DESIGNEES Business Function. Designations should be for *temporary* access and should be ended when no longer needed. See the CONNECTIONS Security Tip Sheet *Understanding Designees & Assignees* for more information on this security feature.

Business Function	Security Attributes	Description	Recommendations	Comments
		vacation or medical leave, of the person who normally performs these tasks.	temporarily "lending" their access).	
MAINT EDUCATION	• Enter Education	The MAINT EDUCATION Business Function is a specialty path function that, when paired with the CASE SEARCH or PERSON SEARCH 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 agency. 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.	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 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 *See the MAINT AGY ACC BF description for a description of AGENCY ACCESS settings.*
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	MAINT FAD should be assigned to staff, such as homefinders, who will be developing foster/adoptive homes and relative foster homes.	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. 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
		FAD home to the Resource Directory.		
MAINT FAD HIST	• Maintain Home History	This Business Function, for corrective purposes only, 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. REMINDER: Agency Access settings do not grant access to FAD stages. They only apply to FSI and FSS stages.
MAINT HEALTH	• Maintain Health	The MAINT HEALTH Business Function, is a specialty path function that, when paired with the CASE SEARCH or PERSON SEARCH BF, permits staff to access, view and/or update Health information for any child in a Family Service Stage for which the agency has been designated as having health care responsibility. The worker with this BF and no assigned role in the case can maintain health information but does not have access to other information within the Family Services Stage unless additional access has 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 agency; such as a nurse, other health care professional, care coordinator or care manager, 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 and those with access to their workloads through unit hierarchy typically do not need to be assigned the MAINT HEALTH BF.** Agency workers with the role of Case Planner, or those accessing the workload of the Case Planner may view and modify health information for all tracked children in the stage without the MAINT HEALTH BF. Agency workers with a role of Case Worker, or those accessing the workload of the Case Worker, may view and maintain health information for all children for whom their agency has been designated as responsible without the MAINT HEALTH BF. Agency workers with a role of Case Planner (CP) or those with access to the workload of the CP can designate health responsibility to the agencies of other workers assigned a role in the stage.

Business Function	Security Attributes	Description	Recommendations	Comments
				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 agency as the Case Planner or Case Worker but *without* a role in the stage can view and maintain health information for children for whom the agency has been designated as having health responsibility. • Workers with the MAINT HEALTH BF in the same agency 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 agency 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 assigned at the time of stage closure in the agency 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 agency 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 agency as a worker with a role of Case Worker whose agency

Business Function	Security Attributes	Description	Recommendations	Comments
				was unassigned prior to the stage closure may not view or maintain any health information.
MAINT ORG HIER	• Maintain Organizational Hierarchy	This Business Function allows the Security Coordinator or Back-up Security Coordinator to arrange Agency 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 agency 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 FAD stages. Creating an Organizational Hierarchy, without use of Agency Access Direct Supervisory Line settings confers no additional access.	**This powerful Business Function can be used to allow a great deal of access to a large number of workers throughout an agency's hierarchy.** It is most useful for agencies 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 Agency will be employing this type of security strategy** and the proper use of these settings is understood. ***Not all agencies will find use of the Organizational Hierarchy strategy necessary or beneficial.***	**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 an agency to be configured into an Organizational Hierarchy, it only grants access to FSI and FSS stages; it does not grant access to FAD stages. Thus, only *part* of a worker's workload may be seen if the worker caries a mixed caseload of FAD plus FSS and FSI 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. 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	This BF should be assigned to workers responsible for initiating a placement request and completing all information	Workers with this BF cannot execute a search or place a child with a resource without also being assigned the SEARCH PLACE BF.

Business Function	Security Attributes	Description	Recommendations	Comments
		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 • Placement Evaluation	up to the point of searching for a suitable placement.	
MAINT SECURITY	• Maintain Security • View Business Functions	This Business Function allows a worker to: • assign/unassign Business Functions to staff within their agency. • 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 agencies with multiple sites may wish to assign this Business	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 agency • assign one individual's Business Function Profile to another individual in their agency for a designated period of time (create a Designee) • designate which placement notification email(s) a worker will receive	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 agency.	
MAINTAIN OFFICE	• Maintain Office	This Business Function allows a worker to add, modify and delete office sites for their agency.	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 agency. All workers have view access to office information through the Office link on the Search/Maintain menu. Searches default to the worker's own agency 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 agency • mark staff as case assignable. • end-date staff in CONNECTIONS • specify a Category for a worker (which displays	This BF should be assigned to the Security Coordinator and Back-Up Security Coordinator. Some agencies may also want to assign this Business Function to unit supervisors so they can end-date staff in CONNECTIONS who have left the agency once the departing worker's workload, To-Dos and	The Security Coordinator or other workers with the MAINTAIN STAFF BF can modify information for all staff in their agency. 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 agency but can be changed by entering the correct Agency Code for another agency or district.

Business Function	Security Attributes	Description	Recommendations	Comments
		as the Job Class on the Staff List).	Upload windows are empty.	
MAINTAIN UNIT	• Maintain Unit	This Business Function allows a worker to manage all units in their agency by: • creating, renaming, and deleting units • assigning/changing Unit Approvers • adding workers to and deleting workers from units • establishing access through unit hierarchy & role in the unit.	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.
PERSON SEARCH	• Person Search	This Business Function allows a worker to perform statewide searches by 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, such as those using the specialty path with BFs such as ACC SERPLAN REV, ENTER PROG NOTE, MAINT EDUCATION, MAINT HEALTH or VIEW HEATH. 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.	A 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 details

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Business Function	Security Attributes	Description	Recommendations	Comments
PERSON UNRELATE	• Person Unrelate	This Business Function allows a worker to unrelate persons who were incorrectly related when being added to a FAD stage.	It is recommended that this BF be assigned to workers responsible for person maintenance for FAD stages or for those responsible for ensuring the accuracy of FSI stages. 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 agency. A Worker with this BF is granted read-only access to all information on a placement request as well access to the following: • Verify Placement window • Placement Resource Roster report • Resource Availability report	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 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.	Agency workers accessing the Placement Dashboard will see • all placement requests created from stages in their agency • placement requests created from stages outside of the worker's agency that have been referred to their agency.

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Business Function	Security Attributes	Description	Recommendations	Comments
RESOURCE ADMIN	• Resource Administrator	This Business Function allows a worker to modify information on the Resource Characteristics tab for foster homes and/or congregate care facilities within their own agency. Access for VA workers is through the Resource link on the Search/Maintain menu (congregate care or foster homes) or when accessing the Resource Characteristics window from a FAD stage on a worker's workload (foster homes only).	This Business Function is appropriate for FAD or other staff responsible for recording and updating Resource Characteristics for foster homes licensed/certified by their agency. For congregate care sites, resource characteristics are entered on a bed level.	Voluntary Agency staff without this BF will have view-only access when using Resource Characteristics link from the workload path. Resource Characteristics must be entered so that the best possible match between children needing placement and available resources can be made through the Placement Module search process.
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: • accept or decline a placement referral to the agency • 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 by an incorrect verification.	This BF is intended for agency workers responsible for monitoring placement requests, accepting or declining referrals and verifying a child's arrival at a placement.	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
REM PER ADD ERR	• Remove Person – Added in Error	This Business Function allows a worker to remove persons who were incorrectly added to FAD stages.	It is recommended that the REM PER ADD ERR BF be given to 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 within their agency for lateral or step-down transfers • create a placement referral for a potential transfer within their own agency • monitor referral responses • select a resource • place the child(ren)	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. Note: District protocols differ. Not all districts allow VAs to do lateral or step-down transfers without county involvement. Contact the local district if you have questions as to local procedures.	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 an upward change in level of care and transfers between voluntary agencies can only be done by a district worker.
STANDARD ACCESS	• Standard Access	This Business Function is automatically assigned to workers when their	Each CONNECTIONS worker must be assigned	Searches on Staff/Security and Office default to the worker's own agency but can be changed. An Agency Code

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Business Function	Security Attributes	Description	Recommendations	Comments
		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.	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.	and/or additional information is required to view information about other agencies/districts. Unit searches are limited to units within the worker's own agency. 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 Unit Approver (typically the Supervisor) 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-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.)	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 (FAD, FSI, FSS). Agency Access settings only apply to FSI and FSS stages; they do not grant access to FAD stages. See the CONNECTIONS Security Tip Sheet *Accessing Someone Else's Workload & To-Do's* for more information on the Unit Summary Access path.
VIEW ACTIVITY	• View Activity	This Business Function grants workers without a	This BF is recommended for Services Supervisors,	Workers assigned a role in a Family Services Stage (FSS), do **not** need this

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Business Function	Security Attributes	Description	Recommendations	Comments
		role in a Family Services Stage (FSS), view access to Activities window information for children 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.	Administrators, or others without an assigned role in an FSS who need to view Activities information (Legal, Movement, Candidacy, Adoption) for a child in their jurisdiction.	BF to view Activities information for the children in that stage. State workers with the appropriate security will have access to all children statewide.

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 (Agency) **or**
		
		   o All Within Unit **or**
		
		   o All within Same Job Type
		
		• Unit Approvers
			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 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
		o All Within District (Agency) **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.		
VIEW CLOSED FAR	• View Closed FAR	This Business Function allows implied role access to closed FAR stages for • a worker with an assigned role in an FSI or FSS stage and one or more persons in common with the closed FAR stage. • supervisors and others with unit hierarchy access to the assigned worker's workload • workers with Agency Access to the assigned worker's workload	It is recommended that this BF be assigned to services workers, supervisors and/or managers who need to view FAR history for stages assigned to a VA worker's workload.	VA workers will be unable to view closed FAR stages marked as sensitive.
VIEW HEALTH	• View Health	VIEW HEALTH is a specialty path Business Function which, in combination with the ACCESS ALL AGENCY	Recommended for workers such as Administrators who need view-only access to health information on an	The following workers can view health information **_without_** being assigned the VIEW HEALTH BF **only _if_** the agency has also been designated as having health care responsibility for the child:

Business Function	Security Attributes	Description	Recommendations	Comments
		and the CASE SEARCH or PERSON SEARCH BFs, allows a worker to view FSS stage health information for all children for which the agency has been designated as health responsibility and has a current role or had a historic role. 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 is granted.	agency 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 BF must be assigned with the CASE SEARCH, PERSON SEARCH or the ACCESS ALL AGENCY BF (which contains CASE SEARCH). Due to the confidential nature of health information, this BF should only be assigned to select staff.	• Workers assigned a role in the stage of Case Planner (CP). • Any worker with access to the workload of the Case Planner through unit hierarchy. • Workers assigned a Case Worker (CW) role • Any worker with access to the workload of the Case Worker. **Agency Access and Organizational Hierarchy paths do NOT grant access to the health module.** *Additional Access Rules for Open Stages:* • Workers with the VIEW HEALTH BF in the same agency as the Case Planner or Case Worker but *without* a role in the stage can only view health information for children for whom the agency has been designated as having health responsibility. • Workers with the VIEW HEALTH BF in the same agency 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 agency was previously responsible, though they will only be able to view that information up to the time their responsibility ended. *Access Rules for Closed Stages:* • Workers with the VIEW HEALTH BF assigned at the time of stage closure in the agency of the Case Planner may view health information for all tracked children in the stage.

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Business Function	Security Attributes	Description	Recommendations	Comments
				• Workers in the agency of the Case Planner whose agency 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 agency was responsible up until the time either the CP role or health responsibility was unassigned. If the agency of the Case Planner was never designated responsible, then NO ONE in that agency will be able to view the health information. • Workers with the VIEW HEALTH BF assigned at the time of stage closure in the agency of the Case Worker may view health information for children for whom their district was designated responsible. • Staff with the VIEW HEALTH BF in the same agency as a worker with a role of Case Worker whose agency was unassigned prior to the stage closure may not view any health information.
VIEW OPEN FAR	• View Open FAR	This Business Function allows implied role access to open FAR stages for • a worker with an assigned role in an FSI or FSS stage and one or more persons in common with the open FAR stage • supervisors and others with unit hierarchy access to the assigned worker's workload	It is recommended that this BF be assigned to services workers, supervisors and/or managers who need to view currently open FAR stages for FSI and FSS stages assigned to a VA worker's workload.	VA workers will be unable to view open FAR stages marked as sensitive.

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Business Function	Security Attributes	Description	Recommendations	Comments
		• workers with Agency Access to the assigned worker's workload		
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 agency 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 an agency's Organizational Hierarchy structure. Security Coordinators in agencies 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 given unit in an easy to navigate format.	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.
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	This BF should be assigned to workers who may need to process placement requests originating from cases marked as sensitive.	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.

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Business Function	Security Attributes	Description	Recommendations	Comments
		do not have the proper security to view the selected request." displays.		