



CONNECTIONS Security Tip Sheet

Removing a Worker from CONNECTIONS

Revised
November 2015

Just as adding a user to CONNECTIONS is a multiple step, multi-system process, removing a user from CONNECTIONS also involves steps in both the CONNECTIONS and Webstar systems. It requires coordinated efforts between the worker's supervisor, the CONNECTIONS Security Coordinator and the Local Security Administrator (Webstar). This Tip Sheet outlines the basic steps necessary to remove a worker's account.

 **Security Reminder:** Technological advances have made it possible to access CONNECTIONS directly over the internet using a computer, laptop, notebook, iPad or even a cell phone. Once a worker leaves employment, it is essential that their access to the protected and confidential information contained in CONNECTIONS be revoked as soon as possible. Disabling a worker's HSEN account in Webstar will remove such access while preserving their CONNECTIONS account and their HSEN email account for additional actions.

Reminder: If others gain access in CONNECTIONS by being a Designee of that worker, their access will be lost when the person is end-dated.

 **Hint:** Running the *Assignee Designee Report*, available through the Data Warehouse (Cognos > Public Folders > Global Reports > OCFS Data Warehouse > Security > Assignee Designee Report) can alert you to potential lost access before the worker is end-dated.

Reassigning and Unassigning Workload Stages

These steps are done by a person with access to the worker's workload - typically the worker's Supervisor.

To Reassign Stages to Another Worker's Workload:

1. Navigate to the workload of the assigned worker.
2. Check the checkbox next to the stage(s) you wish to reassign. To select multiple stages, click the checkboxes of each desired stage.

<input type="checkbox"/>	New	!	Stage Name ▲	Stage	Type	Role
<input type="checkbox"/>						
<input checked="" type="checkbox"/>			Antonio, Maria	INV	INI	PR
<input checked="" type="checkbox"/>			Antonio, Maria	INV	SUB	PR
<input checked="" type="checkbox"/>			Collins, Kristy	INV	INI	PR

Preparing to End-date a User in CONNECTIONS

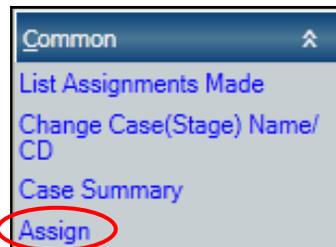
The process of removing a user account consists of two steps; end-dating the worker in CONNECTIONS and deleting their HSEN account in Webstar.

Before a worker can be end-dated in CONNECTIONS, the following conditions must be met:

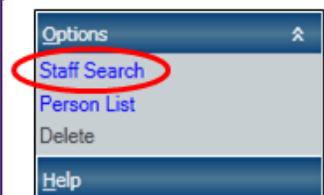
- ✓ Their workload must be empty.
- ✓ All To-Dos must have been completed, transferred or deleted.
- ✓ If the worker is a Unit Approver, their Unit Approver status must be re-assigned.

Note: You may only multi-assign to the *same role* (e.g., Primary, CW) and the *same type of stage* (e.g., CWS, ADPVO, FAR). For INV stages, you may only multi-assign Primary roles.

3. Click the **Assign** link in the left navigation pane.
4. On the Assign window, you may select a staff person in the Available



Staff grid or use the **Staff Search** link in the left navigation pane to add a staff person to the grid.



Note: Only staff marked as Case Assignable will display on the Assignable Staff Grid.

5. With the name of the staff person to receive the assignment highlighted, click on the button that corresponds to the role you wish to assign them. That person will be added to the Assignments grid in the lower part of the window.
6. Click the **Save** or **Save & Close** button to save the changes.



Note: Assigning a new Primary, Case Manager or Case Planner role will automatically unassign the current worker from that role.

For the roles of Case Worker, CPS Worker Monitor or Secondary or for the elimination of the Case Planner role, follow the steps below to unassign the current worker:

To Unassign Stages:

1. Navigate to the workload of the assigned worker. If the assigned worker has a role of secondary, navigate to the workload of the worker with the role of Primary.

2. Select the stage you wish to unassign.
3. Click the **Assign** link in the left navigation pane.
4. In the Assign window, highlight the current worker's name in the Assignments grid.
5. Click the **Unassign** button in the lower left.
6. Click the **Save** or **Save & Close** button to save the changes.



Note: The last remaining role in a stage (i.e., Case Manager or Primary) cannot be unassigned. The stage must be closed to remove the last worker.

If a stage is to remain open, it must be assigned to another worker before the worker you wish to end-date can be unassigned.

Clearing To-Dos

If a worker has not cleared their To-Dos before leaving, these steps would be done by a person with access to them - typically the worker's Supervisor.

- Alert (A) and Reminder (R) To-Dos may be deleted if no longer needed.
- Task (T) To-Dos must either be completed, have a completion date entered or be reassigned to another worker.



Hint: The process of unassigning stages from a workload creates Alert To-Dos, so it is most efficient to reassign the worker's workload *before* deleting their To-Dos.

Deleting Alert or Reminder To-Dos:

1. Navigate to the worker's To-Do Tab.
2. Check the checkbox(es) of the To-Do(s) you wish to delete.



Hint: For Alerts or Reminders, use the filter bar to display one type of To-Do, then use the checkbox in the header row to check all of these To-Dos at once.

Filter Bar

<input checked="" type="checkbox"/>	Type	Status	Date
<input checked="" type="checkbox"/>	A		03/06/2013
<input checked="" type="checkbox"/>	A		03/04/2013

3. Click the **Delete** link in the navigation pane to delete all the selected To-Dos.

Reassigning a Task To-Do:



Task to-Dos can only be reassigned by the Unit Approver of the worker's unit – typically, their Supervisor.

1. Use the Unit Summary (Search Other Units/Workloads) path to navigate to the worker's To-Do Tab.

Search Other Units/Workloads

Agency: DSS Site: 0A2 Zone: Unit: FAD Search Clear

My Workload **My To-Dos**

2. Check the checkbox of the To-Do you wish to reassign.

3. Click the **Detail** link in the left navigation pane.

4. In the left navigation pane of the To-Do Detail window, click the **Staff Search** link.

5. Enter your search criteria and click the **Search** button.

6. From the resulting Staff List, select the person to whom the To-Do will be assigned.

7. Click the **OK** button to the lower right of the Staff List.

8. Click the **Save & Close** button on the To-Do Detail window.

Marking Progress Note Task To-Dos as Complete:

Like other Task To-Dos, those created with a Task Type of Progress Note cannot be deleted by use of the Delete link. To remove them, a completion date must be entered in the Detail window:

1. Navigate to the worker's To-Do Tab.
2. Highlight the Progress Note Task To-Do.
3. Click the **Detail** link in the left navigation pane.

To-Do Detail

Options Staff Search Person List Delete Help

To-Do Data

Due Date: 02/06/2013 Assigned To: Wilson33,Darryl

Task Type: Completed: [Date]

Task Description: Progress Note - 27500374

Comments

4. Enter a date in the Completed field.
5. Click the **Save & Close** button.

Reassigning Unit Approver Status

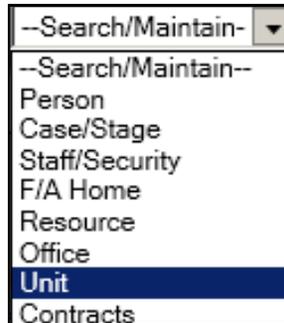
This step requires the Maintain Unit business function and is typically done by the Security Coordinator.



You must remove the Unit Approver designation from one worker before you can designate another worker in the unit as the Unit Approver.

1. Select **Unit** on the Search/Maintain drop-down menu.
2. On the Unit Search window, click the **Search** button to display all units for your agency.

You can narrow the search criteria by entering a Site, Zone (usually used in NYC) and/or Unit name before clicking the Search button.

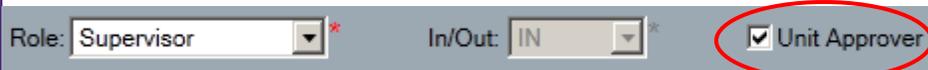


3. In the Unit List grid, highlight the correct unit to open the Detail tab and view the workers assigned to that unit.

 **Navigation Hint:** You can click on the grey box to temporarily collapse the Unit List grid.



4. Select the current Unit Approver (indicated by the “Y” in the UA column).
5. Uncheck the Unit Approver checkbox.



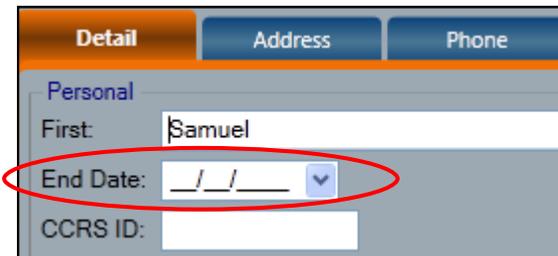
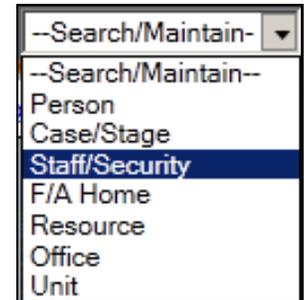
6. Click the **Modify** button.
7. Select the name of the worker who will be the new Unit Approver from the Member Information grid.
8. Check the Unit Approver checkbox.

9. Click the **Modify** button.
10. Click the **Save & Close** button.

End-dating a Person in CONNECTIONS

This step requires the Maintain Staff business function and is typically done by the Security Coordinator.

1. Select **Staff/Security** on the Search/Maintain drop-down menu.
2. In the Staff Search Criteria window, enter the name or Person ID of the worker to be end dated.
3. Click the **Search** button.
4. From the Staff List, select the worker to be end-dated.
5. On the **Detail** tab, enter the date in the End Date field.



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

Hint: You can narrow your search results by typing only the first few letters of the person’s last name. The results will include only those staff in your agency whose last name begins with those letters.



Clicking the search button without entering a name or ID will return all staff in your agency.

Disable or Delete the HSEN Account in Webstar

Delete or Disable?

- A user account should be disabled if a worker is going on medical or other extended leave for more than 3 weeks.
An account may also be disabled to immediately remove access to CONNECTIONS while retaining the ability to reassign cases and preserve the worker's email account.
When the user account is disabled, the worker will be unable to access NYSeMail or other applications that rely on HSEN authentication. For medical or other leaves, the user account will need to be enabled when the worker resumes work.
 **Reminder:** HSEN user accounts are automatically deleted from the HSEN Active Directory if the user's password has been expired for more than 30 days. Disabling an account prevents it from being automatically deleted.
- A user account should be deleted if a worker is leaving the employment of the agency.
When an account is deleted, the NYSeMail mailbox (if any) and home directory (H:/ drive) associated with the user account are also deleted. The mailbox will be deleted immediately, but can be restored within 30 days of the deletion. The home directory associated with the user account is deleted after 30 days, giving the LAN Administrator an opportunity to copy any documents and files from the home directory into another secure folder if needed.

Accessing Webstar

The following steps require an Administrative (ADM) account and are done by a Local Security Administrator (LSA).



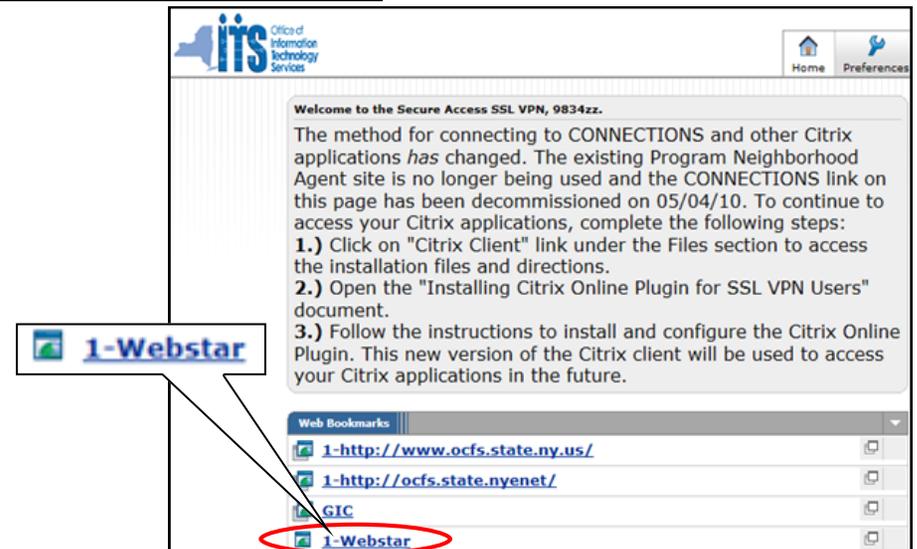
You must be logged in to the state network to access the Webstar application.

- If you are using a LAN connected state computer, open your internet browser and go to: <https://webstar.ofc.state.ny.net>
- If you are using an agency computer, *you must have SSL-VPN permission* in order to access the state network. Open your internet browser and go to <https://rc1.cio.ny.gov/hsen>.



Log in with your regular User ID and password.

On the bookmarks page, select the Webstar link.



On the Webstar Main Menu page, scroll down to the Active Directory Administration section and enter your Administrative (ADM) password to log in.

Deleting a User Account in Webstar

To delete a HSEN account for a user:

1. On the Active Directory Administration Menu, click the **Administer User/Mailbox** button

WEBSTAR HSEN Active Directory ADMINISTRATION Menu	
Click Here to OPEN WINDOW of NEW Standard USER Reports Click Here to OPEN WINDOW of NEW Standard COMPUTER Reports	
You Are Permitted to Do the Activities Listed Below:	
Administrator Designed Reports	HSEN Reports
Search HSEN	HSEN Inquiries
ADM Account Administration	ADM Account Administration
User Account/Mailbox Administration Create, Update & Delete	Administer USER/Mailbox
Workstation/Laptop Administration Create, Update & Delete	Administer Workstation/Laptop Account

2. Enter the User ID in the **DELETE User & Mailbox Account** field.



HINT: You can use the **HSEN Inquiries** button at the top of the page to look up the HSEN ID for your user.

2. Click the **Delete HSEN/Mailbox User** button.
3. Review the information on the resulting window to be sure you are deleting the correct account.
4. Check the checkbox in the deprovisioning agreement.

Delete 11/9/2015 10:37:24 AM [Main Menu](#)

Webstar HSEN Delete Account PU5731 Associated NYSeMail Object

This user's UPN: Melissa.Colton@hsen.ny.gov

Userid PU5731 (Melissa Colton) is found in HSEN @ Agencies
Salvation Army - Syracuse Area Services (C17)
Syracuse 749 South Warren St

Full Name: **Melissa Colton**
Address: **749 South Warren Street Syracuse NY 13202**
Description: **Created None on 7/1/2015 @ 11:23:10 AM by ADM9834ZZ**
Date Created: **7/1/2015 3:23:11 PM** Last Changed: **11/2/2015 2:47:52 PM**



I understand that deprovisioning an account that should be preserved, places the agency at legal risk of data spoliation. By checking this box, I certify that I have received approval from Counsel's office or Commissioner's office to deprovision this account, and that the name I am about to enter is the name of the person who authorized me to do so. I understand that I may be subject to progressive and corrective administrative action for entering false information.

Authorizer:

If This is the User you wish to DELETE, then

[Click Here to Delete HSEN Account & NYSeMail for Melissa Colton](#)

YSM95BAAP
mail: nysemail.nyenet

5. Enter the name of the agency's authorizer (typically the Commissioner or Chief Executive Officer) in the **Authorizer** field.
6. Click the **Delete HSEN Account & NYSeMail** button.

The confirmation page will confirm that your delete was successful.

Deleting HSEN/PU5731 and associated NYSeMail Object

Will Remove HSEN/PU5731 from Groups:

- ✓- Removed from Group Syracuse 749 South Warren St Users!
- ✓- Removed from Group Syracuse 749 South Warren St Conns!
- ✓- Account HSEN/PU5731 Disabled

vDomainDN: LDAP://DC:YSM95BAAP.nysemail.nyenet/DC=nysemail,DC=nyenet

✓- Account CN=PU5731 successfully deleted.
The account is no longer accessible.

Delete Another User

DELETE

If an account is deleted:

- **Day 1-30:** The account and mailbox are still be available to be restored. The user/mailbox will still appear in the Global Address Book as an active mailbox so it can still receive email. NYSeMail suggests the LSA put an out of office message on the deleted mailbox until it's removed from the system.
- **Day 31-60:** NYSeMail can reinstate an account if needed. A district/agency LSA won't have access but NYSeMail can retrieve it.
- **Day 61 on:** Account/mailbox is no longer retrievable.

Disabling a User Account in Webstar

To disable a HSEN account for a user:

1. On the Active Directory Administration Menu, click the **Administer User/Mailbox** button

UNLOCK HSEN User Account <input type="text"/>	<input type="button" value="UNLOCK USER ACCOUNT"/>	Help
Bulk Unlock Accounts	<input type="button" value="UNLOCK ACCOUNTS"/>	Help
DISABLE HSEN User Account <input type="text"/>	<input type="button" value="DISABLE User Account"/>	Help
REENABLE HSEN User Account <input type="text"/>	<input type="button" value="REENABLE User Account"/>	Help
UPDATE Extended Leave for NYSeMail <input type="text"/>	<input type="button" value="UPDATE Extended Leave"/>	Help

2. Enter the User ID in the **DISABLE User Account** field.



HINT: You can use the **HSEN Inquiries** button at the top of the page to look up the HSEN ID for your user.

<input type="button" value="HSEN Inquiries"/>	<input type="button" value="HSEN Inquiries"/>
<input type="button" value="HSEN Reports"/>	<input type="button" value="HSEN Reports"/>

3. Review the information to be sure you are disabling the correct account.
4. Click the **Disable** button.

Additional Considerations

Workers may be assigned other CONNECTIONS-related responsibilities that must be reassigned before they are end-dated. These include roles such as:

- Security Coordinator
- Back-Up Security Coordinator
- Implementation Coordinator
- Back-Up Implementation Coordinator
- Data Warehouse Coordinator
- DAP Security Person

For Security Coordinators and their Back-Ups, the following business functions must be assigned to a new Security Coordinator or Back-Up *before* the account for the current worker is end-dated:

- Maint Security
- Maintain Office
- Maintain Unit
- Maintain Staff
- Maint Agy Acc (Maintain Agency Access)*
- Maint Org Hier (Maintain Organizational Hierarchy)*

* These last two business functions (Maint Agy Acc and Maint Org Hier) can only be assigned or unassigned by OCFS.

To request the addition or removal of these functions, the

agency's Implementation Coordinator must complete the *CONNECTIONS Security Coordinator Update and Security Business Functions Request Form* and email it to CONNECTIONSCommunications@dfa.state.ny.us. This form, as well as one to record changes in Security Coordinators, Implementation Coordinators and their Back-Ups, can be found on the Forms page of the CONNECTIONS internet at: <http://ocfs.ny.gov/connect/connections%20forms.asp>



Reminder: When any of these roles change, information must also be updated in the District-Agency Profile (DAP).

If you need assistance updating the DAP, please contact your CONNECTIONS Regional Implementation Field staff.



For additional information on the District Agency Profile (DAP), please see the District Agency Profile Tip Sheet

Resources

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

ITS Enterprise Service Desk
1-800-697-1323