SSIS MENTORING CHECKLIST

This is a check off list for mentors to use when training new staff. In an attempt to uniform our training, we want to make sure that all aspects of SSIS are covered. When you have a new staff member in your unit, be sure to go over all of the items below:

- ☐ Get new staff a Unique Key through TrainLink and help them to get signed up for New Worker Basic Training.

- ☐ Logon ID – Assist worker in logging on to SSIS using the new temporary password that has been set up by Rosie in Accounting. Once they have successfully logged on, make sure they change their temporary password to whatever they would like. To keep things secure, we don't want staff using "spring" or "winter" as a password. Passwords only change every six months.

- ☐ Navigation – If new staff is not familiar with SSIS, show them the basics such as the tool bar, doing a person search, tree view, workgroups and chronology.

- ☐ Caseload List – Workers can access their clients either through their caseload list or by simply doing a client search. Most staff use their caseload list to save time.

- ☐ Chronology – Go over what a contact is and how to enter Contact/Activity records:

- ☐ Show the two ways of entering chronology, either from the workgroup node via Chronology/New Activity, or from the Users Activity Log via New/Activity screen.

- ☐ Show the difference between a time note and a case note.

- ☐ Go over entering an activity such as internal meetings, training, vacation or staff consultation.

- ☐ Check with lead worker to go over specifics of program specific entry-for example:
  CADI – cannot bill travel time; however, you can for DD. For claiming purposes in the waiver area, there are specific ways of entering case notes which the lead worker will need to go over with the employee.

- ☐ Activity Log – This is a log of time entered by each worker for any given month. If a Contact/Activity is entered through the workgroup it is associated with that workgroup. If you enter a Contact/Activity through your Log, you will need to choose your workgroup from the Workgroup dropdown. ***Please remember when you first go into your Log to check the upper left to make sure that your name is listed as the worker so this time will be associated with you.***

Time Entry Specifics:

- Enter **time client specific** whenever possible
- When **allocating time** in a Child Welfare workgroup in the "Regarding Section," it is ***ALWAYS regarding the child***. Do not select parents or other adults, only the child the worker is working with. To be specific, only enter time to the child/children who have a service plan in that workgroup.
- **Enter time in 15 minute** increments
- If you are attending ***Clinical Supervision*** with a "Clinician", enter your time either as meeting/internal or staff consultation. **Do NOT select Clinical Supervision** if you are the person "receiving" the supervision.
- **Do NOT enter flex time** into SSIS
- **Do NOT over inflate your time**. Here is an example: If you make a call to a client and do not connect, do not enter 15 minutes in chronology. When you call that person again and finally do connect, combine the two time entries into one 15 minute contact. You know it didn't take 15 minutes to call and get no one, so don't make a time entry for that.
- ***Do NOT enter time that you read an email or took your messages off of your phone.*** Since we are entering time in 15 minute increments, there are many other activities that you entered time into SSIS that didn't take that long. Since we do bill in 15 minute increments it all basically equals out in the end.
- **Blocking Time** – If you are on intake you are allowed to block amounts of time that you are doing intake. Those staff members will put like 4 hours to Adult Services and 4 hours to Child Welfare, just as an example. Only use this when you are doing intake, all other time should be as client specific as possible.
- **Information and Referral** – An I & R is only used when you are providing information to a member of the community. Do NOT use I & R when meeting/consulting with another staff member, use meeting/internal for that. I realize that I stated that you should put as much time to a workgroup as possible, but putting meeting time to a program such as CW and then I & R is NOT how you want to enter that time.
- **Entering Time To A Closed Workgroup –** If you receive a call from a client in a workgroup that has been closed, **Do NOT enter it as case management, it must be entered as an I & R only.** If this call requires further action, you may want to consider doing a new intake.
- **Phone Calls** – when placing a phone call to a client and they are not home but you do leave a message, this is ***NOT a "completed"*** attempt.
- **CMH/AMH** – When you are entering time in a Children's Mental Health workgroup for a client between the ages of 18-21, be sure to change the service to Adult Rule 79 case management.
- **Activities** – There are three "activities" that are to be used by ***lead workers only***. Those activities are; Program Development, Planning and Program Evaluation. ***Records and Reports*** may be used, but please limit the time put to this activity. ***Correspondence*** should also be used very limited, because correspondence is generally case/client specific and should be put to the workgroup.

Sherburne County is not a 100% time reporting county; however, we do have an 80% client related standard that each worker is held to each month. If each worker accounts for 7.5 hours per day, they will make their 80%.

☐ Opening A Workgroup – Go over entering a new intake and creating a workgroup. Make sure when they are entering participants in the workgroup to do a complete search in the county and statewide system to see if they already exist. Only after doing a complete search and not finding the person would you "create" a new client. Make sure to enter current information such as full name, address, phone number, DOB, SSN, race, Hispanic heritage, disabilities, etc. If the worker receives a case from intake, make sure to check to see that this information has been completed.

☐ Expand the tree view and go over all of the folders for a client. Explain when you would enter information in them and for what purpose you are doing this.

Expand Chronology and show them where the documents folder is and how to use it. Also go over attaching files and service plans.

☐ Supplemental Healthcare Eligibility – In order to claim for Targeted Case Management, Rule 5, LTCC and DD the worker will need to enter a new Supplemental Eligibility. Even if this is a workgroup that has been transitioned over to case management from intake, the previous worker is supposed to have ended their eligibility and you will need to enter a new one for your worker assignment. Note: Use the workgroup open date as the effective date for your healthcare eligibility. Also, don't forget to complete an annual review and enter it in the tab next to the eligibility that you entered.

☐ Fiscal Details – Go over Service Arrangements and Service Agreements. There are Tips of the Month available with screen shots from Rosie to show the step by step process. Show them the Payments folder to look to see if a payment has been made to a vendor for the client. Check Healthcare Claims.

☐ Business Organization – Do a search for a vendor in Bus Org to show worker where to look to see if this vendor is in the system to complete a service arrangement. Make sure to check "services provided" to verify that the service that they need to use this provider for is there. If the vendor doesn't exist or the service doesn't exist, they will need to notify Rosie in Accounting by email with the vendors name, address and service to be provided to get them entered into SSIS or the service added.

☐ Transitioning A Workgroup – Show the worker how to transition an assessment workgroup to case management by doing a "Workgroup Change." This will transition the workgroup and keep it assigned to them and will generate a hard file. Make sure that they know NOT to just "close" the assessment workgroup and put an end date on it. This does NOT create a case management workgroup; it just sends it out to the assignment log where it will just sit.