Professional Collateral Tutorial

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Professional Collateral Tutorial Introduction

Professional collaterals are primarily entered into workgroups because they are providing professional services or resources for families or clients at an agency. Unlike collaterals, these persons have a relationship with clients due to a professional relationship with them, such as a Guardian Ad Litem or therapist.

To differentiate from a professional collateral, a collateral is a person who may provide support, guidance and information to clients but in an unofficial capacity, such as a grandmother or family friend. No local database of collaterals exists in agencies, as these are entered for each workgroup. As a result you cannot search for a collateral the same way you can for a professional collateral. To enter a professional collateral in SSIS, first and last names fields are required entries in addition to the entry of at least one employment record.

Professional collaterals can be accessed through Person Search. Person Search can be accessed from an intake or a workgroup, at the Main menu, the Windows toolbar, and through Searches/Logs. When completing a search, if the Title bar reads Person Search, the search results search cannot be used to add the collateral into the workgroup. Use Person Search to look up information on clients or professional collaterals. This is a view-only search and cannot be used to add clients or collaterals into an existing intake or workgroup. To view information on professional collaterals, Person Search can be accessed in one of two ways: from the Windows toolbar under Searches/Logs or from the Person Search button on the Application toolbar

To add professional collaterals to a workgroup, Person Search must be accessed through the Participants folder of the workgroup, a quick add button, Action menu, or from a Person Search button within a Detail screen.

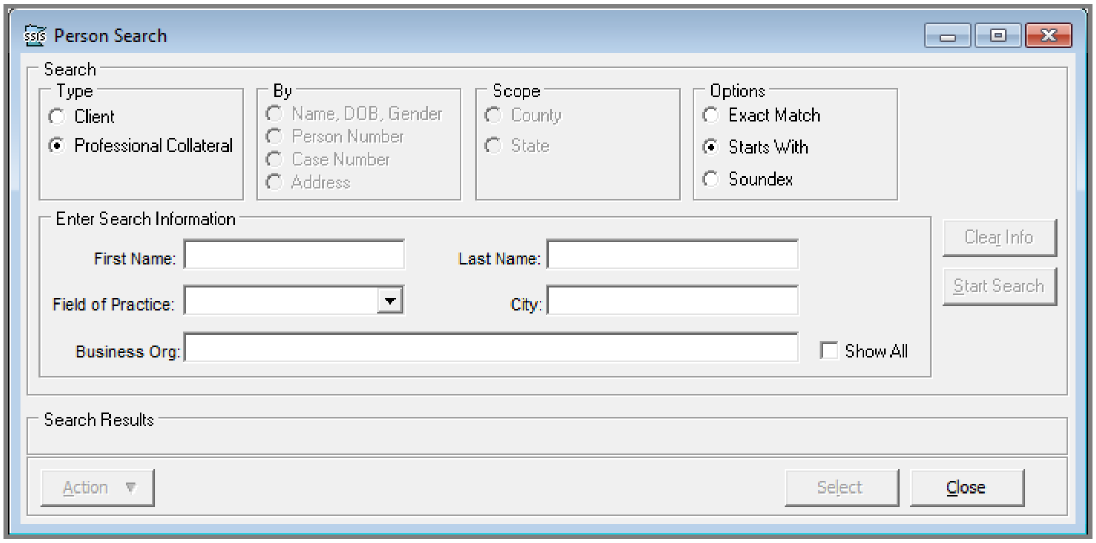
Once professional collaterals are entered, users can access them from their agency's database. They are able to search for and retrieve the professional collaterals and add them to a workgroup. There is no statewide database of professional collaterals available for search. During a search if a record is not found, new persons may be entered to the SSIS database. The professional collaterals can be accessed in any workgroup within an agency.

Best Practice: Perform a person search before entering collaterals to avoid duplicate person entries and the need for merging professional collaterals. Agencies may want to designate one person *who enters edits, deletes and merges professional collaterals; all staff can search for and retrieve professional collaterals.*

Reference: For more information about Person Search, refer to the Person Search Module.

Professional Collateral Search

Person Search Screen



To Complete a Professional Collateral Search:

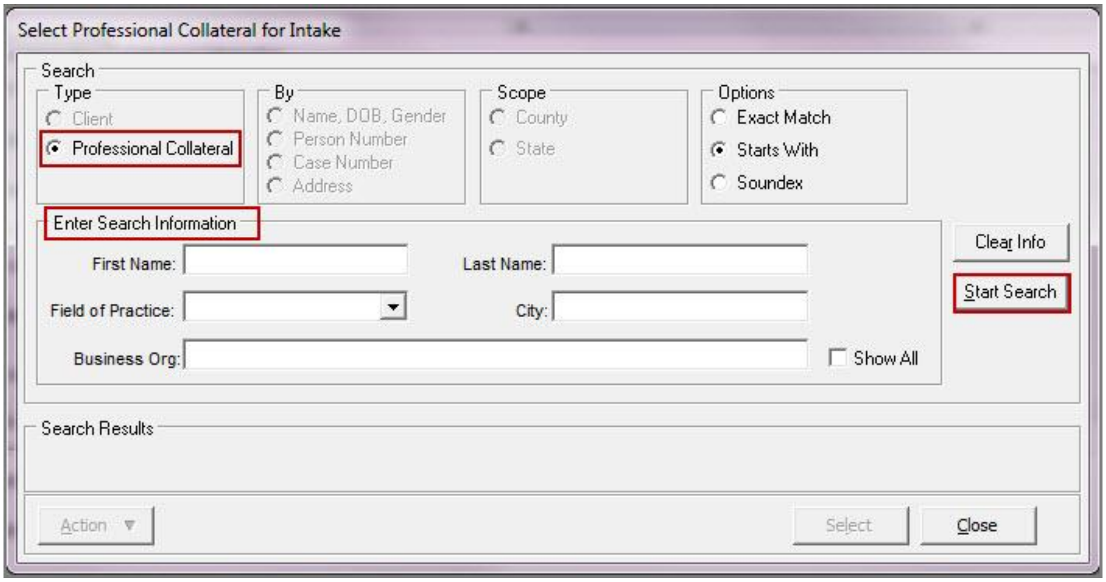
1. From the Windows toolbar, select **Searches/Logs**, and then select **Person Search**.
   or
   From the **Application** toolbar, select the **Person Search** button.
2. Select **Professional Collateral** in the **Type** field.
3. Complete the known fields and select **Start Search**.

Hints:

- *If the user is unable to perform a person search function, check with the agency's SSIS mentor or coordinator for SSIS Security Administration rights.*
- *It is unnecessary to enter information in all of the fields, but some information in at least one field is required to enable the search feature.*
- *The By and Scope fields are greyed out and unavailable since professional collaterals are only searchable within the local agency's database.*

Add an Existing Professional Collateral

Select Professional Collateral for Intake Screen



To Add an Existing Professional Collateral:

1. Highlight the **Participants** folder in the Tree View or on the Intake node and access the **Action** menu, or click the Collateral quick add button on the Application toolbar; select **Add Existing Collateral.**
2. The **Type** field defaults to **Professional Collateral**.
3. In the **Options** field, select **Exact Match**, **Starts With** or **Soundex**.
4. In the **Enter Search Information** section, enter or select the appropriate search criteria.
5. Click **Start Search**.
6. Highlight the appropriate professional collateral within the **Search Results** grid section and click **Select**.
   or
   Multi-select several professional collaterals at once and click **Select**.

Hints:

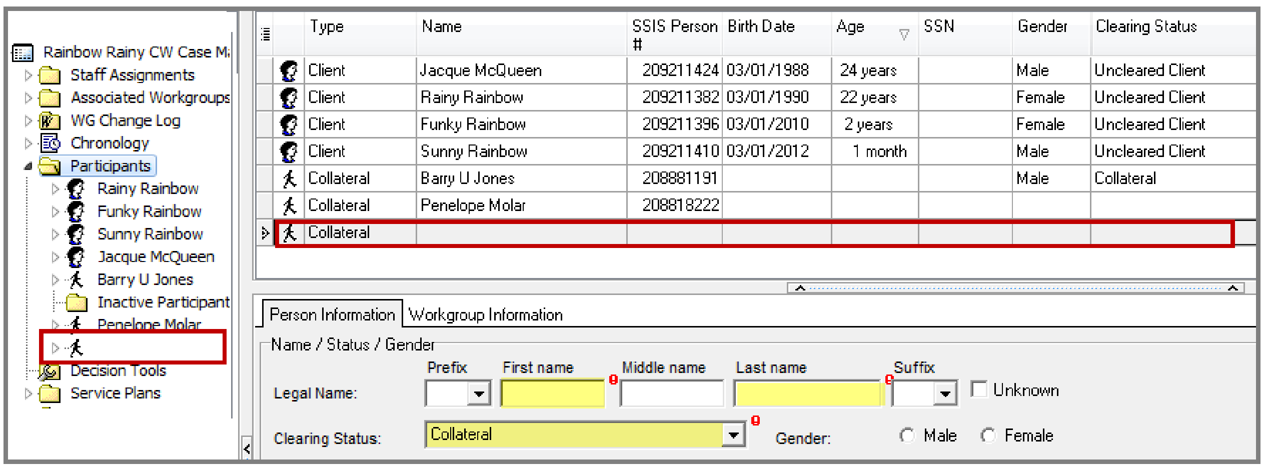
- *Check the Show All option, to obtain professional collateral search results that include active, future, expired, and no start and end dates on the employment record.*

- *To verify the correct person is selected from the results, select and then view their county detail by accessing the Action menu.*
- *If the desired person does not display, adjust the search options or expand the search with fewer field entries.*
- *If the person cannot be located, a new professional collateral can be added to the system.*
- *Selecting a professional collateral that has multiple employment records brings all the employment records associated with that person to the workgroup.*

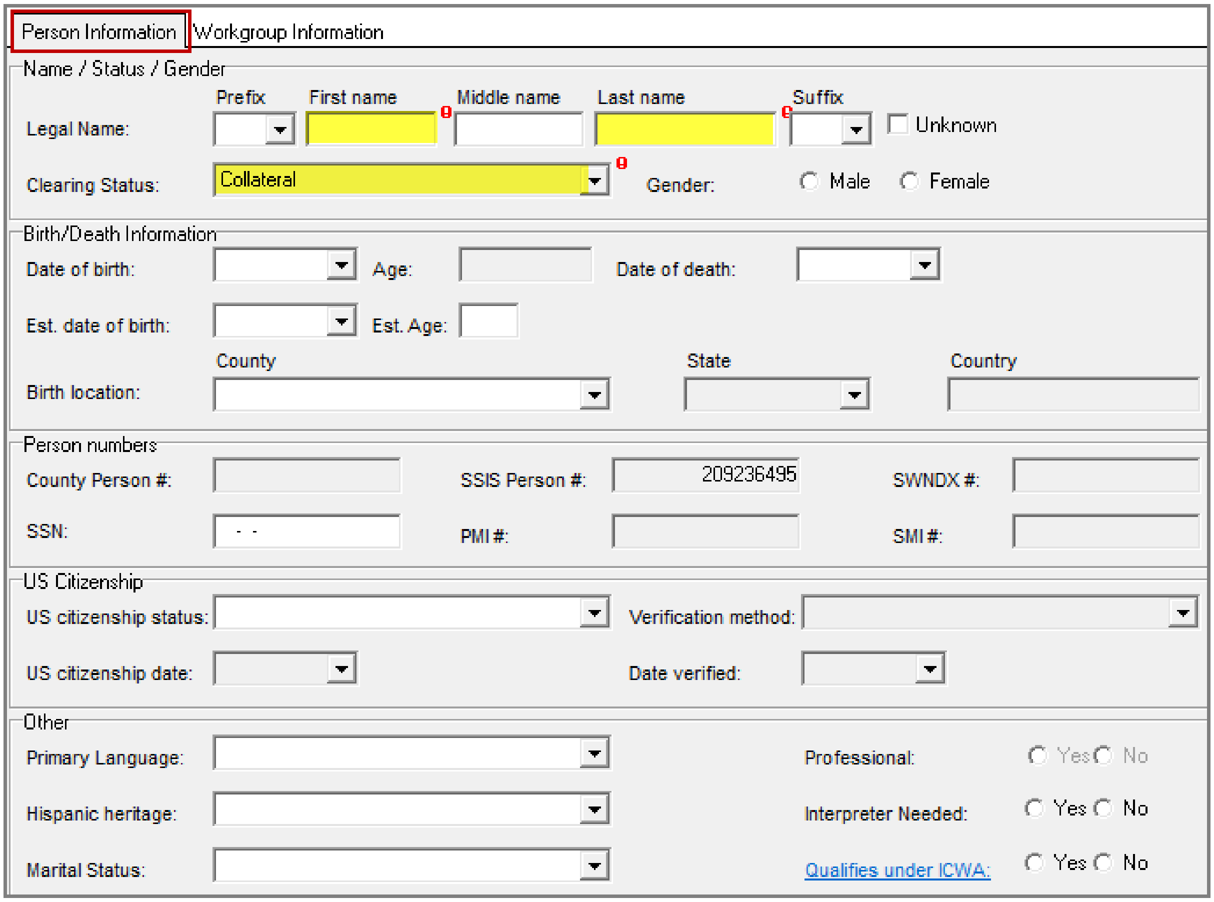
Reference: For additional information on Person Search, refer to the Person Search module.

Enter New Professional Collateral

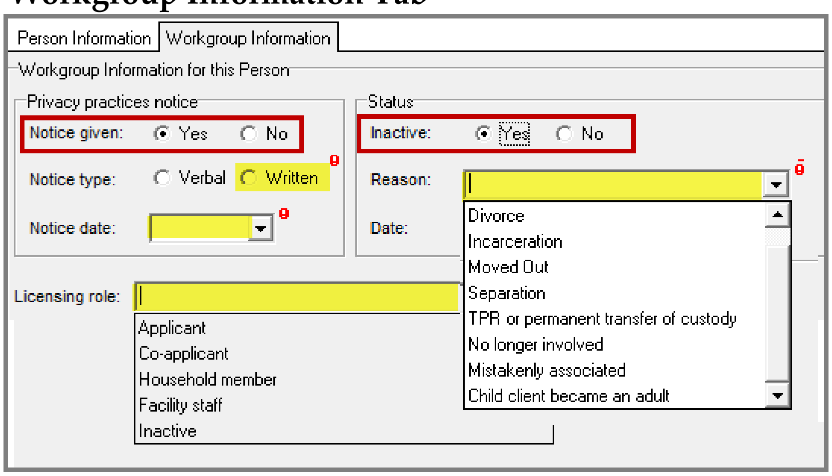
Participants Folder: Collateral Node



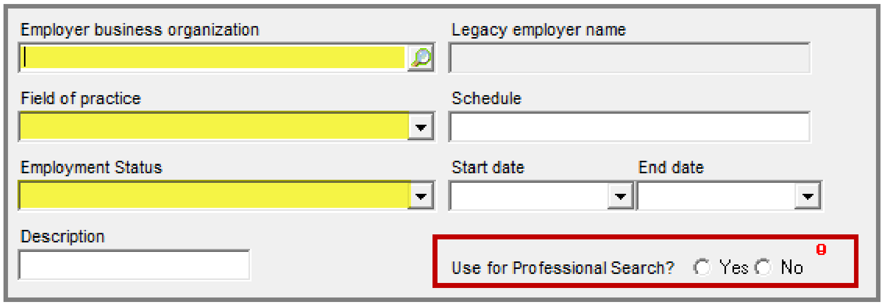
Person Information Tab



Workgroup Information Tab



Employment Screen



To Enter New Professional Collateral:

1. Highlight the **Participants** folder in the Tree View or on the Intake node and access the **Action** menu, or click the **Add New** or **Existing Collateral** quick add button on the Application toolbar.
2. Select **Add New Collateral**. A new collateral node is created in the Participants folder and the corresponding detail panel displays for additional completion if applicable.
3. On the Person Information tab three fields are mandatory: **First name**, **Last name** and **Clearing Status**. Clearing Status is disabled because the field autofills to Collateral and no entry is required. Enter in as much information as known about the new collateral. The **Professional** option button defaults to **No**. In order to define this new collateral as a professional, an employment record needs to be completed.
4. On the **Workgroup Information** tab no fields are mandatory. Three sections are **Privacy practices notice**, **Status**, and **Licensing role**. Edit these sections as appropriate.
5. Click **Save**.
6. Access the **Action** button or right-click on the **Collateral** node and highlight **New /Add existing**.
7. Select **New Employment.**
8. Click the **Search** button to search for an employer. Complete the Bus Org search and select the employer.
9. Complete the remaining fields.
   - The **End date** should be entered only when the professional is no longer working with the client or family.
   - The **Use for Professional Search** is a mandatory field.

- Select **Yes** for "**Use for Professional Search?"**

10. Click **Save**.

Hints:

- *If the employer is not in SSIS, contact your Mentor/Coordinator to inquire about adding the Bus Org to the database.*
- *Additional Information can be added to the Collateral's Person Information tab, Workgroup Information tab, and in the appropriate Address/Phone/E-mail; Name/Race; and Education/Employment folders.*

Best Practices:

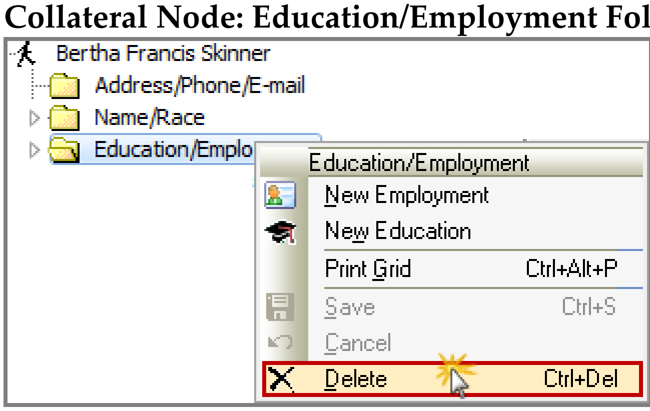
- *Search for an existing Professional Collateral prior to creating a new Professional Collateral entry.*
- *Complete as much information as known in the Person Information and Workgroup Information, as well as the other folders for the Professional Collateral.*

Reference: For additional information on Business Organization, see the Business Organization module.

Delete Employment Record of a Professional Collateral

A user can delete one or all of the collateral's employment record if it is not current.

Collateral Node: Education/Employment Folder



To delete an Employment Record:

1. Highlight the **Education/Employment** folder in the Tree View or on the detail panel.

2. Access the **Action** menu and select **Delete**.

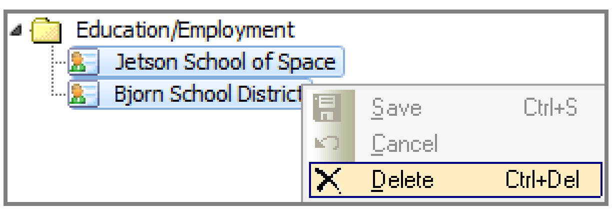
3. Select **Yes** in the dialog box to confirm the deletion.

Hint: The button entitled Professional will remain as a Yes and will need to be changed manually on the Professional Collateral's Person Information tab.

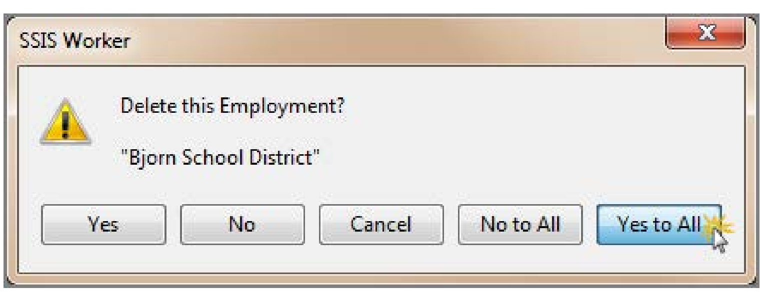
Delete Multiple Employment Records of a Professional Collateral

A user can delete multiple employment records if they are incorrect. Agencies may want to designate one person who deletes professional collaterals.

Person Node: Education/Employment Folder



Delete Employment Warning Dialogue Box



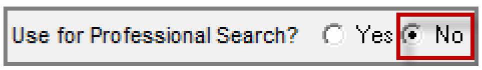
To delete multiple Employment Records:

1. Expand the **Education/Employment** folder and multi-select all the employment records to be removed in the Tree View or on the detail panel.
2. Access the **Action** menu and select **Delete**.
3. A dialogue box displays. Click **Yes to All**.

Change Professional Collateral to a Collateral

If a collateral is incorrectly identified or no longer is functioning in a Professional Collateral capacity, you may wish to change them to no longer identify them as a professional collateral.

Collateral node: Use for Professional Search



To change Professional Collateral to a Collateral:

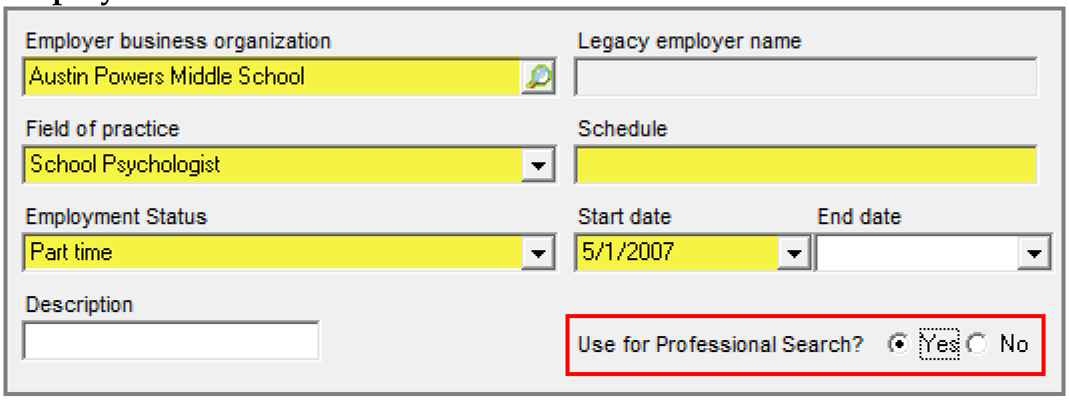
1. Expand the Collateral's **Education/Employment** folder and highlight the Education/Employment folder.
2. On the detail panel, select **No** on the **Use for Professional Search?**
3. Click **Save**.

Hint: Check with your Agency SSIS Mentor/Coordinator for agency specific protocol.

Change a Collateral to a Professional Collateral

In order to change a collateral to a Professional Collateral, an employment record must exist that indicates they are to be used in the Professional Search.

Employment Screen



To change a Collateral to a Professional Collateral:

1. Higlight the Collateral's node. Access the **Action** button or right-click on the Collateral node; highlight **New /Add existing**.
2. Select **New Employment.**
3. Click the **Search** button to search for the employer. Complete the Bus Org search and select the employer.
4. Complete the remaining fields.
   - The **End date** should be entered only when the professional is no longer working with the client or family.
   - The **Use for Professional Search** is a mandatory field.
   - Select **Yes** for "**Use for Professional Search?"**
5. Click **Save**.

Hints:

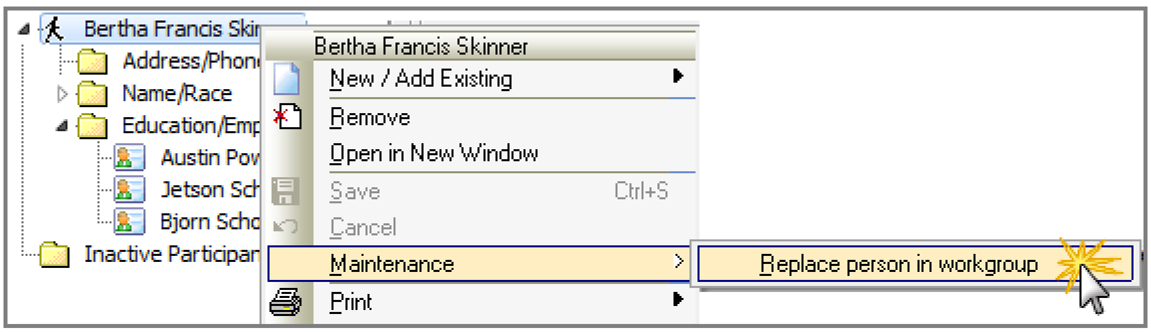
- *Check with your agency's SSIS Mentor/Coordinator for agency-specific protocol.*
- *If the employer is not in SSIS, contact your Mentor/Coordinator to inquire about adding the Bus Org to the database.*

Replace Professional Collateral in a Workgroup

You can remove a professional collateral from a workgroup and replace by adding a different person. You may choose to do this if a professional collateral was incorrectly added to a workgroup, or if there is a change in a professional working with the family, such as a new guardian ad litem.

Replace does not delete the person from the professional collateral directory; a user can continue to search for the professional collateral.

Collateral Node: Replace person in workgroup



To replace a Professional Collateral

1. Highlight the collateral in the Tree View and access the **Action** menu.
2. Select **Maintenance** and select **Replace person in workgroup**.
3. Enter in search information for the replacement collateral and click **Select**.
4. Highlight the replacement collateral and click **Select**.

Hint: Replace does not delete the person from the professional collateral directory; a user can continue to search for the professional collateral.

Remove a Professional Collateral from a Workgroup

If a collateral is incorrectly added to the workgroup or no longers serves in a Professional Collateral capacity, you may wish to remove him/her from the workgroup.

To Remove a Professional Collateral:

1. Highlight the Professional Collateral's folder.
2. Access the **Action** menu and select **Remove.**

Hints:

- *Remove does not delete the person from the professional collateral directory; a user can continue to search for the professional collateral.*
- *A user can delete multiple Professional Collaterals from a workgroup at once by multi-selecting the Collateral nodes in the Tree View.*

Merge Professional Collateral

The professional collateral merge function exists to eliminate duplicate person records. The merge function allows a worker to combine two same or related person records into one person record in the database.

To Merge Professional Collateral:

1. Highlight the **Participants** folder and select the collateral node.
2. Access the **Action** menu and select **Merge professional collateral**.
3. Enter search information and click **Start Search**. Separate records display as rows in the grid for each name and every employment record for that name. To view more information on the person record, select the record in the grid and click **Action**, then **View Cnty Detail**. Highlight the person record you want to merge with the main record and click **Select**.
4. A Confirm message displays stating, *"If you continue all data associated with SSIS Person #: [lists number and person name] will be associated with SSIS Person #: [lists number and person name]. SSIS Person #: [lists number and person name]- will be deleted. Do you wish to continue?"* Click **Yes** to merge the person record. Click **No** to stop the merge process.
5. The person record is merged with the main record. The SSIS Person # is changed to display the same number as the main record. The merged record's current legal name type is changed to Other (non-maiden) previous legal name type. Employment records are associated with each name that displays with the main record.

Hints:

- *In order to access Merge Professional Collateral, workers need the assigned function of Merge Professional Collateral in Security Administration. See the Security Administration module for more information.*
- *Workers can still search for the main or the merged record. The record that was merged can be viewed on the main record's folders.*
- *When selecting a record on the Search Results grid that has already merged with the main record, a SSIS Worker message displays stating, "Same person selected. Cannot merge." Click OK and search for a different record.*
- *An agency may want to designate one person who merges professional collaterals.*

Resources

Clearing Module
http://www.dhs.state.mn.us/main/groups/agencywide/documents/pub/dhs16_144008.pdf.

Enhanced Grids Module
http://www.dhs.state.mn.us/main/groups/agencywide/documents/pub/dhs16_146991.pdf.

Participant Entry
http://www.dhs.state.mn.us/main/idcplg?IdcService=GET_FILE&RevisionSelectionMethod=LatestReleased&Rendition=Primary&allowInterrupt=1&noSaveAs=1&dDocName=dhs_id_008068.

SSIS Admin: General Security
http://www.dhs.state.mn.us/main/idcplg?IdcService=GET_FILE&RevisionSelectionMethod=LatestReleased&Rendition=Primary&allowInterrupt=1&noSaveAs=1&dDocName=dhs_id_008044.

Person Search
http://www.dhs.state.mn.us/main/idcplg?IdcService=GET_FILE&RevisionSelectionMethod=LatestReleased&Rendition=Primary&allowInterrupt=1&noSaveAs=1&dDocName=dhs_id_008032.

Bus Org
http://www.dhs.state.mn.us/main/groups/county_access/documents/pub/dhs_id_008000.pdf