SSIS Mentor Meeting Minutes-Revised 1/4/05

October 19, 2004

<table>
<tr><th>Topic</th><th>Discussion</th><th>Action Item</th></tr>
<tr><td>Welcome</td><td>Maureen welcomed all mentors and introduced the presenters. Clocks were handed out to new mentors, if you have not gotten your clock for being a mentor, please contact Maureen.</td><td>maureen.zinda@state.mn.us</td></tr>
<tr><td>Placement</td><td>Brian Doerner started the training out with the newly redesigned Placement module for Version 3.8. Some important comments were brought up during the training:

Absence means a run or unauthorized leave from placement.
Request for a log that reflects the changes to placement setting.
When you have the Changed Placement tab selected this log is available.
Request for an edit in Data Clean up when the placement setting is set at Pre-Adoptive setting to open A/G workgroup.
We are unable to request this as an enhancement because the Data Clean-Up function is related to AFCARS and your request is not AFCARS related.
Can you start a continuous placement without a provider?

Yes, but you will be asked to complete the placement record for AFCARS in the Data Clean up.

How will conversion happen around placements?
Placements will convert over to Version 3.8 well. The information will fill into the related areas on the appropriate screens.
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Difficulty of Care (DOC)	Noreen demonstrated the new DOC function. This function does not replace determining the DOC assessment first. This screen is to record the decision that was made. Some of the questions that came up were: • DOC points will import in CSIS in a future build. • Could DOC auto fill into the letter to the parents and foster parents? **Not at this time, this screen is a stand alone function. Information does not get sent anywhere. The Federal Gov't. wanted it displayed.** • Where is the State on the new DOC form? **CNPI is currently being piloted. The State continues to require the DOC assessment tool found in Rule Sec. 9560.0654 which is the current document. For the past several years DHS has evaluated another tool to assess both the child's needs and the providers interactions (CNPI). For more information contact call Deborah Beske-Brown at 651-296-4309.** • There will not be any <u>**new**</u> alerts or reminders in Version 3.8. Please email any requests for Alerts/Reminders to the HelpDesk. Thanks. • Make sure there is a "0" (zero) available to enter for zero DOC points. This may be used to indicate the client doesn't qualify for any points or that they have been dropped. • Offer on-line help about the DOC ratings on the screen.	Per Deborah Beske-Brown, DHS Children's Services **Enhancement request entered** **Enhancement request entered** **Enhancement request entered**

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<tr><td>SELF issues</td><td>There were some questions regarding SELF that seemed to leave mentors more confused.
DHS is currently getting the information about SELF from the SSIS database and from private agencies. Counties still are required to enter the information into the report
Will there be a SELF node under the client now?
No.
Will the ALS workgroup still have to be created?
Yes.
The ALS plan has been attached to the new OHPP so that it is available for the clients that are 14 and older.
This ALS plan also is available from Chronology and would be used from there if the child was not currently in placement.</td><td></td></tr>
<tr><td>Adoption</td><td>Lisa talked about Adoptions and Version 3.8.
The reports will be submitted electronically to DHS instead of being mailed.
The Adoption node is now attached to the client instead of the placement.
Counties are responsible to fill out the information for Public/Private Agency Initiatives.
Private agencies are responsible for submitting their own information.</td><td></td></tr>
<tr><td>Statewide Case Access</td><td>Lisa talked about this new function. Here are a few of her important comments:
The client must be cleared to SWNDX to be accessed.
Which clients would show on the tab in State Detail? Cleared and uncleared clients would show up.
There is a security function related to this called Copy Clients from Remote County.</td><td></td></tr>
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<tr><td>Data Clean up</td><td>Beth Sahr presented the new Data Clean up function for Version 3.8 and as expected was widely appreciated by all. The Data Clean up function has replaced View Missing Data in the application. It is available at the Workgroup and the Client folders.

Some of the features include:
The ability to go right from the item needing an update to the field and screen to complete the action.
The opportunity to enter information when you see the need.
The information for AFCARS and NCANDS is kept in compliance.</td><td></td></tr>
<tr><td>Professional Collateral & Merge</td><td>Noreen reported that a new feature of Professional Collateral called Merge was being developed for Version 3.8 release. She was unable to show the functionality because it was in the early stages of development.

Some of her important points included:
This function will allow counties to clean up any Professional Collaterals that are duplicated in the system due to multiple entries of the same person.
Once the duplicates are identified, the person with the Merge Professional Collateral security function is able to combine the same Professional Collaterals together into one record.</td><td></td></tr>
<tr><td>Licensing Interface</td><td>Noreen presented information about the new functionality that allows staff to view child maltreatment offenders from DHS licensed facilities on SWNDX. This is valuable information for reviewing applications from persons interested in becoming a licensed provider for the county agency.</td><td></td></tr>
<tr><td>Child Well Being (CWB) & CMH screening indicator</td><td>Beth Dewyre presented information regarding these two new features for Version 3.8. Policy on both was included in the handouts. Important information included:
CWB tool functions like an SDM tool. It is completed in the same manner. This tool replaces the Edocs form.
CMH screening indicator screen is used to record that the screening was done or couldn't be done and reason.
Request that the IEIC referral be added to Documents in chronology.</td><td>Enhancement request entered</td></tr>
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Programs & Services Revision	Maureen gave an over view of Programs and Services redesign in the new architecture. Some of the high points were: • Counties will be able to add sub-services to already established services and include all programs at one time. • Counties will be able to hide activities so that the county doesn't have to use them. • Activities can be added to services and sub-services but SSIS controls the activities to choose from. • Programs and Services are accessed from the new architecture (tree view). • Sub-services can be required fields if the county chooses. • Programs and Services changes will affect Contact Activity and Service Agreement screens because the sub-service field will be added to those screens.	

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Fiscal	Gary Klinghagen went over the handout regarding preparation for fiscal with the mentors. The handout is on the web and called Fiscal Planning document. High points were: • Counties will be able to view BRASS numbers at any time because they will be available in Contact Activity and Service Agreements. When the Program/Service/Activity drop-down lists in Contact Activity or Service Agreement is chosen, the BRASS code and description both display. There is a Code Toggle button next to the Program field that sets the number or description first as the display until you change it even after you exit. Throughout the application, a combo box will be used to display both the BRASS code (numbers) and description (ex., Foster Care). This change makes it easier to understand for accounting and social services staff. • Providers, Vendors and Business Organizations are all the same in Version 3.8. All are called Business Organizations. Vendors have county vendor numbers. There is still some provider information entered—Individual Provider, foster care preferences. • Merging vendors will be an important function for the counties to clean up vendor information prior to Version 4.0. • Vendor import will be on a near real time basis. • Because of the changes to Programs and Services in Version 3.8, all settings will revert to the default. The counties will be given a report of the defaults and a report of the detail settings current in the county. By comparing the two reports the counties will know what to restore. The areas to check closely are: Staff or Vendor Provided indicators, any changes to activities that the county may have made, and any activities that the county has set up for county sub-services. • Chart of Accounts Program and Service elements do not need to be BRASS program and service codes. Social Services can use whatever program and service elements the rest of the county uses for General Ledger numbers.	**http://www.dhs.state.mn.us/main/groups/county_access/documents/pub/dhs_id_029500.pdf**

Revision

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Business Organization	Beth Dewyre presented information regarding the new Biz Org changes: • After the Vendor Import is turned on in counties, staff will not be able to edit or enter certain fields (Cty Vendor #, Name, payment address, phone, etc.) Entry and editing of this vendor information must be done in the county accounting system. Entry of additional addresses, phones, foster care preferences, individual providers etc. will still be available in the worker application. • Counties must clean up their vendors with the Merge process before Vendor Import can be turned on. • There are reports being sent to counties to assist in the vendor data cleanup. These reports will also be available within SSIS Worker. • Ability to search for Vendors with missing AFCARS information. • New address screens with non-parsed addresses, new ability to enter email addresses.	
Nex Revision	February 24, 2005 at the Holiday Inn in St. Cloud, MN.	

Questions and Answers from the mentor meeting 10/19/04

1. **Can we pick and choose our information for Chart of Accounts (COA) info?**
   A: Counties must import or enter COA elements and codes before the implementation of Version 4.0.

2. **What happens to old Service Agreements that were created and then the county stopped using Service Agreements because the system didn't work at conversion into Version 3.8?**
   A: They remain in the database and will until Fiscal is released statewide in 2006. They will be left as legacy service agreements on the tree view similar to what was done for IV-E eligibility in 3.7. Service Arrangements do not span fiscal years, so would not make sense to convert all activities or Admin activities.

3. With the new OHPP can we use the Copy Plan function when Version 3.8 comes out?
   A: Because the OHPP is totally new, you will not be able to copy previously created plans. You will have to start a **New Plan** when you need to review but you can still Copy and Paste information into the new plan. It is important to make sure all of the fields in the application are completed to take full advantage of the auto-fill function.

4. How do I get to the Business Organization Search? Is this the same as the current provider search?
   A: In Version 3.7, you have a couple of ways to search for a Business Organization. One is **File>Find>Business Organization.** The other is to click on the **Business Organization icon** on the Tool Bar. A separate Provider search is no longer available in V3.8. The Provider search function has been incorporated into the Business Organization search.

5. Can there be some way to search for red-flagged Intakes without having to pull up all completed workgroups? Workers forget to complete their intakes regularly.
   A:Yes, by sorting by **Workgroup Needed** column on the **Intake Log**. Or by filtering by **Status: Pending** on **the Intake Log**.

6. Will SSIS be able to incorporate the **OHPP** into the **Report to Court** form?
   A: The **Report to Court** form found in Chronology specifically includes all the requirements per Supreme Court Rule. The OHPP includes all the statutory requirements for that plan. Since these requirements are different we can not combine the forms or make the Court report acceptable as the OHPP.

7. Will we be able to disable vacation or sick leave activities in Admin?
   A: Yes, with the new **Programs and Services** redesign you will be able to "hide" the activities that you don't want your workers to use.

8. Is there a way in **Staff Activity** to indicate if you want your activity to be billed to MA (i.e., CW-TCM claim) and have it chosen by worker so case note, documentation has the detail to support MA claim?
   A: No, and there is no plan at this time for this feature. The recommendation for case notes is that social workers follow best practice for quality case notes on all significant case notes. The CW-TCM claim will then be adequately covered.

9. Will we be required to use Service Arrangements by a certain date? If yes, would that be with Version 4.0 or Version 3.8?
   A: Version 4.0 will have the newly redesigned Service Arrangement in it and that version is not expected to be released statewide until January 2006. Service Arrangements must be used for Child Welfare in version 4.0. We believe counties will want to use Service Arrangements because the Service Arrangement is a template for making payments (many fields will auto fill from the Service Arrangement) and can also be used for budgeting. Maximums can be set for individual service arrangements or for a group of service arrangements.

10. We need more Alerts and Reminders and they need to work. Our social workers have so many date/time compliance issues that it is important that this function be complete and working. How many alerts and reminders will there be reflecting the new features?
    A: There are no new Alerts/Reminders in Version 3.8. SSIS would like to know from counties exactly which work requirements they would most like to see with Alerts/Reminders.

11. Can Adoption begin during CW/CP workgroups or is it limited to Adoption/ Guardianship? If adoption can start in CW/CP, will it transition now that it is not attached to placement?
    A: Yes, you are still able to begin Adoption in the CW/CP workgroup and then associate the Adoption workgroup with the placement and add the child into the Adoption workgroup. In Version 3.8 the adoption information is can be viewed for the child in any workgroup, as well as at **View Cnty Detail**, as the adoption node is now child specific and not workgroup specific

12. Will there ever be a report under General Reports that will identify all children in the county who are eligible for SELF?
    A: There is a report that is in the priority mix for Version 3.8 that will identify potentially eligible SELF clients :
    - Currently open,
    - SELF client data report for a certain year,
    - all clients 14 thru 20 who have had at least one day in placement on or after their 14^{th} birthday.

13. Will we be able to print placement history report from client search without having to open the workgroup?
    A: Yes, from client search:
    1. Highlight name result in grid
    2. From **Action** select **County Detail**
    3. Click on **Placements/Locations/Absences**
    4. From the grid on the right, right click and select **Grid Options**, **Print grid**.

14. Are you importing the IV-E basic eligibility month from MAXIS which is different from the IV-E reimbursable months?
    A: We are importing the IV-E basic eligibility month from MAXIS.

15. How do you find timeliness errors?
A: Children in Placement by Date Range report is a report that can be pulled by social workers and supervisors. This report identifies all the children in placement during the time selected. Workers can review this weekly to keep up on placements that have ended and need to be discharged.

16. Do auditors require a paper version of DOC assessments?
A: SACWIS requires that DOC assessments be done in the system of SSIS. Social workers need to enter a description of the child's specific behaviors and conditions in the **Comments** section.
SSIS will clarify this by changing the **Comments** label to **Describe Behaviors and Conditions.**
Social workers should use either SSIS Help text or a hard copy from E-docs to inform themselves of the type of behaviors and conditions that typically receive certain levels for DOC but the specific child's circumstances must be documented on the SSIS screen.

17. Will SELF reports be pulled to issue reimbursement?
A: Information from the SELF reports on SSIS is captured by DHS staff and the results are reported to Claire Hill, DHS SELF Program Coordinator. Private agencies continue to send paper copies to Claire Hill since they do not have access to SSIS.

18. Why is the Filing Date of the Petition required for IV-E?
A: The petition filing date establishes the eligibility month in which the AFDC relatedness determination is made. That is really the only significance of the petition. The first court order (not petition), which must occur within 180 days of placement, must include a best interest or contrary to the welfare judicial determination, followed by a reasonable efforts to prevent placement determination within 60 days. If these judicial determinations are not obtained or are not obtained in a timely manner, there is no IV-E reimbursement for the child.

19. Will there be a copy feature of the DOC letter?
A: No, but you could edit the letter and add additional children if they are at the same placement, and you have assessed the same point level for each child.

20 When would a worker select Other Non-Relative?
A: When the relationship is significant but not related (i.e., Godparent, neighbor, a very good friend of the parents.

21 Should AR offenders who were substantiated in the past be denied daycare license? Should they be denied for LNL daycare? FC?
A: One clarification is that for an AR maltreatment intake there is no maltreatment determination at all unless the track is switched to Traditional approach. Please contact Molly Kelly at DHS Licensing Division (651-296-3768) for information about licensing questions regarding this issue.