

FAUG AGENDA

Deschutes County

August 15, 2012 - 1:00 p.m. to 5:00 p.m.

August 16, 2012 - 9:00 a.m. to 12:00 p.m.

Meeting Location:

Deschutes County Community Corrections - Programs Building
63311 Jamison Road, Bend, OR 97701

Day One:

Introductions/Welcome/Housekeeping

Lily/Group

In attendance: Susan Sowers (Benton); Marne Pringle (Clackamas); Ken Yee (Columbia); Brenda Carney (Columbia); Erin Larson (Coos – Alternate); Rich Vigil (Crook); Bob Lucas (Deschutes); Chris Bell (Deschutes); Andie Cortes (Douglas); Tina Potter (Gilliam/Sherman/Wheeler); Roger Stampke (Harney); Susie Strom (Hood River); Michael Elkinton (Jackson); John Watson (Jackson); Dru VanRiper (Jefferson); Lily Morgan (Josephine); Kathy Bafford-Foltyn (Klamath/Lake); Larry Evenson (Lane); Carolyn Knox (Lincoln); Bonnie Timberlake (Linn); Tracey Coffman (Malheur); Gina Courson (Marion); Wende Kirby (Multnomah); Angela Boyer (Polk); Wayne McCollum (Tillamook); Marco Beitel (Wasco); Christopher Swayzee (Washington); Betti Spencer (Yamhill); Denise Sitler (DOC-CCB); Lee Cummins (DOC-FAST); Mary Hunt (DOC-FAST); Shawna Harnden (Parole Board); Dianne Routt (DOC-ITS); Trish Davenport (DOC-CNLR); Mark Evans (DOC-CNLR); Laura Medcalf (DOC).

Introduce John Watson, Asst Director of Jackson Co. as our liaison for OACCD. He has experience as a FAUG Rep.

Ed (Hood River Co) has retired and is working in Washington state now. He gave his contact info: edp@co.klickitat.wa.us Phone: 509-250-0528

Dru VanRiper has a new email address: druvanriper@jefferson.or.us

Minute Review

Group

No changes to minutes proposed.

Membership

Lily

Chris Bell has been maintaining the membership list and list of authorities. List passed around to members in attendance to verify info is correct. Chris is asking to hand the duty to another member; as she has been serving in this capacity for some time (and she has been promoted to Supervisor in Deschutes County). Dru VanRiper has agreed to take over these duties.

Case Management Automation Enhancements

Laura Medcalf-DOC

Changes being made to Case Plan.

- Working on splitting out the Progress Notes box to allow for a more “historical” setting (running history of notes).
- Enhancement to allow Action Steps to be sorted in due date order. Steps w/o due dates will fall in at the top of a list.
- Treatment Module (for Institution Program) contains 4-character codes and 8-character description currently. Enhancement will add a reference sheet to allow Community to view a more detailed description of the programs.

Changes to Action Plan.

- Creating reports separated from action items. This will allow flexibility on which items the PO desires to complete; therefore, will not be required to do all or nothing.
- On Summary Screen – adding 2 new categories – Predatory S.O. and SVDO designations.
- Adding reports PO’s can use to audit tasks on their caseload (LS/CMI’s, Case Plans, etc).

Enhancements in Reports – being pushed out until end of August. We will be advised when the next Enhancement Release will occur.

Laura has a list of Items being worked on and it will need be reviewed to determine priority. The list will be sent to the FAUG DL first. The list can be divided into separate lists; those that are Institution-only and those that are either Community-only or Institution/Community. Ultimately, even the Institution-only items must be approved by FAUG. Suggestion made that those items could be reviewed/prioritized by DOC and then brought to FAUG for approval. FAUG will still be able to see both lists.

ISSUE: PO’s still having problems with logging in and having blank menus; rather than their list of menus. Some PO’s have found that logging out and logging back in works. Others have found that by changing their role will bring up the list.

ISSUE: In the testing done, it was discovered that the auto-chrono feature of the Action Plan will not update the Last OV, Next OV, To-Do List and OfficeVision Calendar in AS400. Laura is aware of this and has this issue on the list of enhancements. This is a borderline bug/missed-requirement issue. This will be dealt with for the next Enhancement Release.

Lily asks that the group come up with recommendations for steps on the Change Plan...who is focusing on which domains over others.

List of Boiler-plate action steps for domains was originally taken from Multnomah County, but other counties don’t utilize all items that Multnomah County uses. A list of items can be sent out to see what the different counties would like to see. Some counties have to take EPICS into consideration for theirs. However, most counties don’t yet use EPICS. Question was raised to see if the list (statewide) can be viewed by any PO, but able to be sorted by those that a particular county utilizes (e.g. “favorites list”).

ISSUE: Some people are finding the LS/CMI scores (individual and aggregate) are difficult to read without having to go to the PrintScreen function. Request for enhancement made.

Mark Cadotte is creating a list of goals which might bring about new features/items in the drop-down lists.

Laura's desk number – if questions about enhancements – 503-378-2133

Public Safety Checklist (PSC)

TRAINING

The Go-Live date is September 1, 2012. After the PSC has been out 6-12 months, it will be reviewed for possible revisions. Denise Sitler states that this review will likely include a PO-override study to see how many overrides are being done and for what reasons.

OJIN is used to determine if any DV-related convictions are present. Conditions entered into AS400 will also be used for PSC data.

Lee advised of two caveats:

Caveat #1: Originally, new convictions were to be updated first of every month, causing them to not be counted when the PSC is done that day. This has changed...updates will now run nightly. Conviction data will be available the following day (after the overnight update has run), but still can cause problems for running PSC on new offenders just out of Court. The PSC cannot be done until the case is entered into AS400 and many counties build files on new offenders the same day the offenders are convicted and come out of Court... and the PSC is run that same day. With the delay in updating, a same-date-as-conviction PSC will not be accurate. Lee reports that it was just announced that soon, we may have real-time updating...but probably won't be included in the September 1 release...will be a "patch". After this "patch" is released, this issue won't exist.

Caveat #2: A study was done to see how many Score/Level changes would actually result from new convictions (the study used a population of new-admits June/July; about 600-700 cases). The result was that new convictions affected level changes (i.e. from Low to Med) about 10-11% of the time. This level of risk was deemed "acceptable". So prior to running a PSC, if it is taken into consideration that the conviction must update overnight BEFORE accepting the PSC test/level, then this "issue" can be abated. A web-based "stand-alone" PSC can be added to a menu and used to run an "unofficial" PSC, adding the ORS of the new conviction; which can give the user an idea of how the case will score out.

PSC are going to be required on new cases, but it can also be run on existing cases. The expectation is that changing to PSC will create a higher MED population as opposed to OCMS. It is possible that some offices may require the PO's to run PSC on all existing cases.

Lee told the group of a program that the Institutions currently use: a program called "OTTO"; which uses behind-the-scenes data to tell you that something has happened to a record that could affect a level change. The PO will receive an Alert Designator: a notifier that something happened and the case should be reviewed. In November, we can discuss what other things we might want to use OTTO for.

Alert Designator – An “R” will appear to signify that a case needs a review. In the subsequent screen, an asterisk indicates that an action MUST be taken to remove the “R” Alert Designator. The items w/o an asterisk can be cleared without taking any action in the case...PO only needs to clear the item. The group is told that one PO can act on items on a case on another PO’s caseload. Additionally, a PO can act line-by-line or clear all notifiers at once. DOC has many items that will set an Alert Designator, but Community will only have one – which is to indicate that something has occurred that can affect the PSC score/level. PO can “subset” their caseload to find only cases that need review.

After completing a PSC, the PO can then use the Proxy to affect a more accurate score. When the Proxy is completed, the PO then chooses which assessment to use. The PSC should be the “primary tool”...not the Proxy (unless circumstances warrant). The goal is to avoid PO’s using the Proxy to seek a different result than that given by the PSC. Once the PO chooses the assessment that they are going with (PSC v Proxy), the decision is made and the score is “set”.

The PSC/Proxy is not “fully automatic”. The PO can run a new assessment or not, depending on circumstances (i.e. the PO can choose to not re-assess a case, even if OTTO sends a message that some new activity has occurred). This allows the PO to drive the assessment...not the assessment to drive the PO.

Reasons a new PSC/Proxy would be necessary: Revocation/New Conviction or if the Offender absconds for over 6 months.

ISSUE: A client on Conditional Discharge or Diversion would not have a conviction, therefore, no conviction data is captured. The arrest data is captured, though. It is unsure how this is going to be formulated in the PSC.

ISSUE: Yamhill Co. is no longer using OJIN. Lee verifying that the program used in Yamhill Co will be compatible.

NOTE: Due to fact that LS/CMI has 5 scores (Very Low, Low, Medium, High, Very High) and PSC has only 3 (Low, Medium, High), the scoring is not going to be identical between the pair.

Juvenile info can be entered into Proxy, as well as out-of-state CCH. If an offender reports out-of-state or Juvenile arrests (which, otherwise, would be unavailable information), we can use that info for Proxy questions.

Comments are able to be entered...but will not auto-chrono. The question was raised – whether they should auto-chrono. The system will, however, show that a comment was entered. The user can go in and view it, if desired.

Override function – can only use the available reasons listed – no “PO Discretion” option is available. The tools, such as LS/CMI, Static99, Stable/Acute, ODARA are available on the current model. These tools, plus Policy override must be defended with a comment. The group was advised that the Stable MUST exist to use that reason for override. The user cannot use just the Acute. Decision made that the Static99 and Acute will be removed from the model before Go-Live date. The system currently allows an override UP (to a higher level) when one of the

"Unavailable" reasons are used, but consensus is that there aren't any reasons for which it would be done. Currently, no edit exists to prevent this, however. Overrides can be removed and new overrides can be done, but this can destroy the history. Best practice would be to create a new assessment. The model does not include IMMI cases to be listed on the "Unavailable" reason code list. In the course of discussion, it was brought up that, once a client is removed from USA, he/she should go on the PO's Outcount (IMMI), so it is not necessary to add IMMI to the list.

It has been noted that new convictions of the same type (i.e. property crimes or person-to-person crimes) does not seem to move the level up most of the time. But if an offender commits a new crime of a different type, this often results in the PSC moving up a level.

The PSC level can go down –based on 5-yr crime cycle and age.

Supervision will be based on LS/CMI levels, not PSC levels.

OTHER ITEMS:

FUNDING (Denise Sitrler)

Funding will be based on current supervision level based on PSC...not LS/CMI-assessed levels.

Budget is built on assessment tools. Used at 2 times – once to build the budget; wherein, administrators assign a cost to each risk level (ie. High is \$20, Med is \$15, etc). This is totaled to calculate the budget...which is done on Odd Numbered Years (based on snapshots done in Oct/Nov/Dec). The second time that the assessment tools drive the budget is when it is used to determine how much of the budget is assigned to each county. If an offender is not assessed after 60 days (Unclassified), they are dropped off the population and not calculated into the budget. Recent snapshot showed that approximately \$10M was lost for the next biennium due to these "Unclassified" offenders. The most common populations that are "lost" are Compact Offenders, recent abscond-returns, revocation returns and Trans-Leave clients (after they Post). To avoid being dropped off the list and budgetary losses, offenders should have an assessment completed within the first 60 days (or within 60 days of return to supervision). NOTE: Assessments completed on Admit-Pending cases will NOT show and will NOT be counted in the budget. AS400 will show them, but they won't count. PO's can subset their caseload to find those cases by typing *UNA in the RISK TYPE on their subset screen (F17). CMPO should have initial assessments to be included. IMMI, ABSC would not need one.

Soon, a list will be sent to OACCD to advise of those cases who are past 60 days without a completed risk assessment.

POLYGRAPH PROGRAM (Lee Cummins)

Previously, comments could not be changed or deleted and Polygraphs, themselves, could not be deleted. Now, they can be done...but only Lee or Mary can do so...and must be fully researched for necessity beforehand. This does not apply to the 7-day ability to make changes that the PO's currently have...only to older records.

Day Two:

Sanction Changes

Lee Cummins

Authority changes in Sanction Module – authorities have been tightened up – it is now based on Offender status – FAUG Reps can ONLY delete on sanctions that are PPS/LC or Prob status. Now, FAUG Reps cannot change any sanctions on cases on Board status (PPS/BRD, Parole, PostParole, etc).

A clean up list was distributed of open sanctions (older than 120 days). For the PPS-Board cases, the FAUG Rep is to contact Shawna Harnden at the Parole Board. They will close CLNA (Close No Action). CLNA will mean that at the time that the sanction was created, the Board took no action. They are not making any sort of determination as to the sanction...only that no action was taken by the Board. If the FAUG Rep believes there is good reason to delete the sanction, Shawna will send it to Lee Cummins to delete. With the cleanup list, FAUG Reps are to try to sort out all those that they can and work with Shawna/Lee on the remainder.

The question was raised as to past discussions that sanctions should not be deleted, but would be closed NOAC, instead. Discussion had and it was decided that ONLY special conditions should warrant a deletion of a sanction. ALL others should be closed NOAC or CLNA.

The clean up list has 8,628 sanctions not closed. Shawna requested that she be contacted by email – and it is preferred that the FAUG Rep be the one to sort them out, rather than the individual PO's. If multiple cases need to be addressed, send them in batches. Interventions were not included.

Request made that the cleanup list be sorted to separate out the ABSC cases from active cases. Lee will attempt to do so and email the new, sorted list out.

Request made to have a cleanup list of open Interventions. These can be closed by FAUG Rep...not covered by the restrictions.

Question raised if SOON has discussed making an edit in AS400 that will not allow cases to be transferred out (i.e. IRT) with open sanctions. This would be a Service Request. Suggestion made that PO's deny IRT's until the open sanctions are closed.

Supervisors have a 365-day edit. After cleanup, FAUG Reps will also have a 365-day edit. Currently, FAUG Reps do not.

Service Requests on Sanctions have had to take a back seat to the Static99 issues. Request was made that a priority be made to have the Sanction list on any offender show the SANCTION GIVEN, rather than SANCTION RECOMMENDED.

Sanctions cannot be changed on offenses that are closed. Support Staff will have to reopen the offense to allow the change to be made...then the case can be closed.

Mary said that SOON has made a request for Service Request for edit that will not allow Support Staff to close the offense/sentence until any open sanctions on that offense/sentence. FAUG supports this edit to be requested on behalf of SOON with FAUG blessing.

Mary said that the transfer (IRT) edit could also be added in this Service Request. FAUG is concerned that this may not comply with OAR's on transfers. This part will be considered further.

Over 300 cases were not designated as PPS/Board or PPS/LC – they turned out to be TransLeave cases that did not get designated when they Posted. A fix went into production on 8/15/12. Only about 6 cases remain to be fixed. They are cases with very odd info needing further research.

DOC Update

Lee Cummins

New Asst Director for Community Corrections – Jeremiah Stromberg. He starts October 1, 2012. Interim Deputy Director – Mitch Morrow covering in the meantime.

Denise Sitler emailed about Proxy “self-report of age” for use in calculations. It is actually preferred over possibly incomplete Juvenile records.

Automation Sub-Committee

Lee Cummins

Next meeting set for September 11, 2012.

We have authority to go to Menu InCouns (Institution Counselor menu) – In that menu, Opt 18 is W/W Offender Relationships. At request of Institution, change made to do F11, 4, O to take the user to the Offender Public Info screen.

To see menus available – go to menu line, type MENU, then F4...gives list of all menus that we have access to.

Mary's items:

For Release Plans, to record financial obligations: F4, has options for COFO, REST, OTHR. Request for COMP to be added (Ticket Request). FAUG approves.

Mary Claire Buckley did a recent presentation. Some info applies to those offenders on PSRB outcount on our caseload. She can come and do a presentation about this. Mary asked that she come to October SOON meeting (Marion Co). If FAUG is interested, Mary can ask her to present at one of next year's FAUG Meetings.

When getting a new offender, esp. coming out from LC or Institution, keep in mind that anything, except for chronos, that is done (i.e. Risk Assessment) during Admit Pending status will NOT count; even though it will show. Same applies to recent ABSC-returns. The offender's record MUST be in the proper status in order for it all to count.

SOON Issues

Mary Hunt

On current CIS report – now have the option can be printed or sent to user in PDF format. SOON wanted to start w/ Total Office Caseload Report. Fee System Network wanted Discontinued Fees Report in Excel, but it is not available. Request being made to allow PDF or Text options. Also request for ideas on other reports desired. Expiration Reports, Home Visit Reports, Fee Reports were mentioned by FAUG. Others can be considered in future.

NOTE: Chris Bell says that Excel can be used to open DOCSUM files...but only puts it in a spreadsheet format. Not all fields transfer over. The Excel cells can be manipulated/sorted (e.g. sort by 24 year old offenders on for a Theft charge, etc.). Only have to Opt24 on entire caseload and then right-click the DOCSUM file and select “Open with” and Excel.

Management wants a Summary Option Report (without having to print out Total Office Caseload Report). This has been started. Demographic and Sex Offender Reports haven't been working properly...was based on old, hard-data...not S/O crime info. Change being made to table-driven reports to create more accurate reports for S/O's. Only pulls if offender has an OPEN S/O crime. If the offender's S/O conviction has expired, but he/she still being supervised, they drop off the report. This is being fixed to allow the report to capture for closed S/O convictions on current or previous cycle.

ICOTS (Compact)

Ruby McClorey

Ruby was not available for this quarter's meeting, but passed along the message “Please email/call her with any Compact questions.”

Parole Board Updates

Shawna Harnden

Aaron Felton won race for Polk Co District Attorney and is leaving Parole Board. The Board is looking for a replacement. They may get one person by September and the other in December. They need all three for loss-of-life convictions, so Jeremiah Stromberg is staying until October 1, 2012. The Board will advise when new Board Members are selected and approved by Senate.

Warrants specialist – Melinda Boyer is going out on Maternity Leave. Annie Williamson will take that over. Currently, Julie Mills is helping. On PO side, not much should change. General email box (accessible by all on Board) created to facilitate warrants. Email address is:

paroleboardwarrants@doc.state.or.us

Can send scanned copy of original, signed Parole Board Orders to Abbie Firestone.

Parole Board does not have copies of the Case Plan and so cannot verify that a directive given on Case Plan. If the PO can substantiate that they directed the client via Action Plan.

If documented problems with substance-abuse, then Board will order SC9. Otherwise, they will not.

Roundtable

Group

John Watson offered to take any items to OACCD from FAUG. Verifying he is on the DL. He will try to attend all FAUG meetings.

Gina – Asked that since FAUG has approved zero-tolerance condition code in past...did that go into the system? It does not appear that it has gone in. yet Question raised about changing the sanction code to 'N'...but this doesn't allow for "zero tolerance" on (i.e. no-contact orders), but sanctioning allowed for other violations. A ZERO will also permit auditing to track number of cases with this condition.

Betti – Asked if there is a merge code for the offense date. There is not. Mary said that SOON said that it could be entered if they have the info...but they often do not have it. This info can help with INPR reports. Any person having an offense date after the start date (not available at this meeting), but prior to 7/1/11; might be eligible for Inactive Probation (if they've met all criteria). Mary will email FAUG with the start date.

Angela – Started in Polk Co to use module to request Probation warrants...but the warrants are approved by Director, Marty Silbernagle...and the intention is to sanction and not return the client to Court.

Angela – Proposal in Polk Co to prohibit use of Marinol (prescription THC). This is still being dealt with.

Lily – the LS/CMI train-the-trainers looking for Reps from each county.

Lily – Josephine Co lost their Community Safety Levy. They are very restricted in their sanctioning. She is asking for an OTHR code for sanctioning for a possible alternative. Suggestions were to use Written Reprimand or COGN.

Future meetings – have changed. Tentative list:

November 14/15, 2012 – Josephine

February 2013– Tillamook

May 2013 – Jefferson

August 2013 – Polk

November 2013 – Multnomah

NEXT MEETING –

Nov. 14-15, 2012

Josephine County