FAUG MEETING MINUTES
November 17, 2021   9:00 am – 4:00 pm

MEETING LOCATION:
Via video conference

DAY ONE:

Introductions/Welcome/Housekeeping	**Douglas County**
Minute Review	**Group**

The minutes from August 2021 were approved.

Attendance	**Charles Adler**

Becky Monahan (Baker); McKenzie Davis (Coos); Brad Allen (Deschutes); Andie Cortes (Douglas); Freddy Vidal (Douglas); Tina Potter (Gilliam-Wheeler); Roger Stampke (Harney); Kara Erwen (Jackson); Denise Easterling (Jefferson); Rachel Frederick (Lake); Joe Swope (Lane); Bonnie Timberlake (Linn); Theresa Plinski (Marion); Charles Adler (Multnomah); Paula Fata (Multnomah); Angela Beier (Polk); Ahnie Seaholm (Tillamook); Rosanna Post (Umatilla); Jessica Jauken (Wasco-Sherman); Christopher Swayzee (Washington); Betti Spencer (Yamhill); Larry Evenson (Yamhill); Crystal Bartell (Yamhill); Lee Cummins (DOC); Jodi Merritt (OACCD); Tracey Coffman (DOC); Michelle Mooney (DOC); Ruby McClorey (Interstate Compact); Dylan Arthur (Parole Board);

County Updates	**Group**

Douglas – hiring for supervisor position and PPO positions
Coos – fully staffed
Lake – fully staffed
Harney – No updates
Jefferson – hiring for PPO position
Linn – hiring for PPO position – currently in process
Washington – hiring for multiple PPO positions and soon a Manager position.
Multnomah – just hired 8 new PPOs – office is finally reopened
Jackson – hiring PPO positions and just hired one last week
Yamhill – started in-house Firearms Training
Baker – fully staffed, open, seeing clients in-office
Tillamook – hiring for two PPO positions
Umatilla – fully staffed

Interstate Compact Update	**Ruby McClorey**

No updates from Compact for FAUG this meeting.

Question regarding DOC emails changing (beginning 12/1/21) and how that will affect logging into ICOTS. Ruby said to send a list of new email addresses and updates to ICOTS can be made.

Parole Board   **Dylan Arthur**

Offices not yet open. It is possible they will open after the first of the year.
Three vacancies (include a Board Position). Conducting interviews 11/30/21 for the Board position. One Assessment Specialist and one Sanctions Desk position opening. The postings should come out soon for those positions.

Board trying to work out Juvenile commutations. The Board will be requesting additional staff to accommodate the workload.

Cite to Appear -   (Similar to Courts' "Cite to Appear" warrants) – PPOs will have ability to cite clients to appear, rather than taking them into custody. The PPO would request this (similar to warrant), but the LEO would direct the person to report to the PPO's office within a certain timeframe. If the client does not report, then the PPO can decide whether to request a full warrant. Testing will be done after the first of the year on this.   The hope is to roll that out soon after.   PBMIS is being programmed to add this ability.

Question re: SO Package A vs. SO Package B and the differences on the wording of the conditions. The Board is going to review those packages after the first of the year.   Package A is set by statute, so wording is not able to be modified without legislative modifications.   Bill 2002 (and some upcoming legislation) included language modifications, but most was to General Conditions, but may have some effects on packages. Jodi confirmed that the language in SO Packages are not affected by the bill.

OCCAD   **Jodi Merritt**

Last meeting mostly regarding SUPV topics.   Next meeting is tomorrow. GC2 is affected by Bill 2002. Plus, it also states that clients would only be required to report in the "least onerous method possible". OACCD is working on trying to figure out what that will mean, but is not in favor of that, as it does not allow for effective supervision.

Question about whether the language re: SUPV being removed. Jodi said that only SUPV was eliminated, but other fees were not. GC language may be modified regarding that.   Other fees are being looked at for elimination by upcoming bills.   Lee has not yet been directed to remove language in the table in CIS re: GC2.

DOC Update   **Lee Cummins**

Michelle Mooney will be taking over Lee's position (Lee is retiring 12/31/21, but contracting back for a short time to assist in transition).

CIS Tools Upgrade Project – Interface for CIS to look like internet program. Judy has done a lot of testing on this project and found several issues (some of which come directly from CIS … ie. Labels can be different in different screens/modules). Concentrated on the PPO and Support Staff Menus to start. Some difficulties include IT Shop losing one of their programmers (she has taken another position) … and Diane Routt is leaving at the end of this year. Therefore, the project will slow down significantly. Documentation will be done, and Fresh (the company) may be able to do some testing on the program. The County Requirements Project will be affected by this … as well, so will be Service Requests.

Extend ECR Program (accessible by Menu CCTrain). Has tutorials in the program. Screen shots and dialog boxes are present.   Sanctions/Warrants/Release Plans are on there. This may be useful for new hires. Some of

the info is outdated, however. Recommend offices look at this to see if this could be helpful for the new users. Michelle will search for other training materials that can be available, as well.

Service Request 2720 (DOCSUM codes) – will go into production. The only part unable to be done is the SO Level/Score. This needs to be updated (to only count the Static score). Diane was working on this but was pulled off of the project. Decision made to put this into production without those SO-related codes being included.

Service Request 3050 (OMS to work like CIS in chronos) – This SR was just assigned. It is hoped it will get done fairly quickly.

Printed Sanction Report issue – Based on reported issues with confusion on the part of Judges (when reviewing SRFs), a request was made to only include sanction dockets in first section. The confusion has been that the first section has all current dockets … not just the dockets that the PPO is sanctioning on. When attempting to change how dockets appear in the first section of the SRF, it was noted that Interventions did not work well … the docket info was not showing correctly. Lee said that one suggestion would be to have the sanction docket in the first sanction, rather than the third section … but she also brought up that the first section (with all current docket info) will have a "Y" designator (under Action) to indicate which dockets are being sanctioned. Therefore, it was felt that this may be more of a training issue for Judges.   If we opt to not to try to work on changes to the Sanctions Module and leave it as it is, then counties can train the Judges to look for that indicator. The labels could be a little clearer … or perhaps the dockets being acted upon could be moved to the top of the list of open dockets … however, this would require a SR (which could take a lot of time) . Tina Potter brought up that by using '20' to print (as opposed to '6' will ONLY print the docket being acted upon … and it includes a signature line.   Betti Spencer also suggested that the PPO add in a small bit about which dockets are being acted upon. (this is how they address the number of prior sanctions show … which can be misleading to the Judges on the clients' prior behavior).   FAUG decided to use different printing options and education … and to not start a SR on this matter.

Employment date field clean-up. This is nearly complete. Odd dates were creating error codes in OMS.

GC2 language (see OACCD section for further details).   Lee will check with Jeremiah Stromberg on this

Question (Multnomah) – when will the update to Static99R be completed? The SO Level and SO Score are being pulled from Acute/Stable combined score. This needs to be reworked. Diane was pulled off that project. DOC is looking to see if someone else can work on this, but it is unknown when it will be completed.

Question (Washington) – Is it possible to add ability for FAUG Reps to move PPS/LC sanctions into DEFR status (and complete them afterwards)?   The programmer who worked on authorities for sanctions may have made this programming applicable to all sanctions … not just PPS/LC. If so, the system cannot differentiate between a LC and Board SRF when applying authorities for FAUG Reps. Therefore, this will required SR to update the authorities. Lee will look into that to see if it is possible to allow permissions on just the LC SRFs. Some other points had to do with whether the SRF could not be moved because, in this particular instance, the SRF was in SUPV status and not in PEND. Perhaps the FAUG Rep could have moved it to DEFR if it were in PEND and that the SUPV status locked it from FAUG Rep action. Lee will also look into this.

SOON Update   Judy Bell

Judy was unable to be in attendance at today's meeting. Nothing pressing at this time and any business can be brought up at the next meeting.

EVAL Code Training   **Jodi Merritt**

See pages 5-18 for materials.   NOTE: The flowchart was updated slightly and replaced the original flowchart presented following conversation during the training.

NOTE: This process is not yet in production. Question asked to FAUG whether to add the functionality now … or whether there should be a training opportunity first.   FAUG initially proposed to have this process go into production December 1, 2021. However, the definition for SUCC needs to be updated to work with the EVAL code. This has to be approved by OACCD.   It was then agreed to hold the go-live date until FAUG has had an opportunity to put definitions together … propose them to OACCD for their January meeting. This can be then voted on in FAUG February 2022 meeting.   A group (Charles, Christopher, Angela, Andie, Tina and Lee) will review/input on the definitions.

Roundtable   **Group**

Christopher (Washington) – will not be taking the meeting minutes in upcoming meetings. Angela will

Marne (Clackamas) sent email prior – PPO reach out after phone call after home visit. Wife answers Ring Door Bell. How to reflect that?   FAUG agrees that an Attempted HV needs to be reflected. Agreed that it would be a "H – X" (Home Visit – Collateral).   Jodi will take this to OACCD for their consideration.

Betti (Yamhill) – OMS Release Planning – Chrono Type shows "Release Planning" – But, that is not in CIS. Created an error because the codes don't match. Had to change to Accepted.   Suggested that she reach out to John Hanson Colin R. for further information.

Charles (Multnomah) – Are Eastern Oregon institutions releasing AICs to the valley counties directly from their institutions or are they still moving the AICs to the valley institutions?   Some of this may be due to pandemic and vaccination status. There are also transport issues due to the pandemic.

McKenzie (Coos) – Users have reported to her that they cannot open OMS from CIS (F11, 5, M). They have to use a link and open in different browser.   Due to the phaseout of Internet Explorer, OMS does not work in IE now. Suggestions to have users set their default browser to Edge or Chrome. Christopher (Washington) noted that if using Edge, it affects Mail-Merge functionality … specifically, Edge will automatically name the DOCSUM.txt file with a number in parentheses (i.e.   DOCSUM(28).txt).   The Mail-Merge documents will not merge correctly if the txt file is named anything other than DOCSUM.txt. Therefore, if users have Edge as their default browser, they will have to be taught to make sure that the DOCSUM file is appropriately named and saved … otherwise, Mail-Merge will not occur properly.   Angie (Polk) noted that it works well in Chrome, however.

Upcoming meetings will likely remain virtual until reopening has progressed further in the state.

<div align="center">

NEXT MEETING:
February 16th & 17th
Via WebEx

Tentative 2022 Schedule:
May 18th & 19th
August 17th & 18th
November 16th & 17th

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Explanation of Treatment Module Flowchart – EVAL Code

- **All Inclusive Treatment provider** - provides both the initial evaluation and any recommended treatment for the client.
  - o<u>CIS Entry</u> - treatment provider entry with referral date (standard practice)
    - Evaluation is completed and treatment **IS** recommended
      - <u>CIS Entry</u> - CIS treatment entry date
      - <u>CIS Entry</u> - Treatment completion date and appropriate closure code
    - Evaluation is completed and treatment is **NOT** recommended
      - <u>CIS Entry</u> - **F4 Treatment modification of entry to corresponding EVAL only code**
        - *Identify where the client completed the EVAL in the notes section.
      - <u>CIS Entry</u> - EVAL code closure to MXBN
    - Evaluation is **NOT** completed
      - <u>CIS Entry</u> – **F4 Treatment modification of entry to corresponding EVAL only code**
      - <u>CIS Entry</u> – EVAL code closure to UNSU
    - Evaluation is **NOT** completed due to <u>EXPIRATION</u>
      - <u>CIS Entry</u> – **F4 Treatment modification of entry to corresponding EVAL only code**
      - <u>CIS Entry</u> – EVAL code closure to EXPI

- **Multiple Treatment Agencies** - Evaluation and Treatment are provided by separate agencies
  - o<u>CIS Entry</u> - treatment EVAL code entry. *Identify where the client was referred for EVAL in the notes section.
    - Eval **NOT** completed by client
      - <u>CIS Entry</u> - EVAL closed to UNSU as client did not complete the evaluation
    - EVAL **NOT** completed due to Expiration of supervision
      - <u>CIS Entry</u> - EVAL closed to EXPI
    - EVAL completed and treatment was **NOT** recommended
      - <u>CIS Entry</u> - EVAL closed to MXBN due to no treatment recommended
    - EVAL completed and treatment **IS** recommended
      - <u>CIS Entry</u> - EVAL closed to SUCC as evaluation was completed
      - <u>CIS Entry</u> - **<u>NEW treatment module entry</u>** to where the client will be attending the recommended treatment
      - <u>CIS Entry</u> - Treatment completion date and appropriate closure code.

DEFINITIONS
MXBN and EXPI are already approved by OACCD, but ADMN, SUCC and UNSU are not.

1. Administrative

Current Definition:

ADMN – Administrative is a neutral closure in that it was not the offender's non-compliant performance or behavior in treatment that caused termination. Examples might include death of offender, offender moves out of the County or State, treatment program closes, etc. Meant to reflect that the offender would not be held responsible for not completing the treatment requirements nor would the provider.

Proposed addition:

ADMN - "This may also include an approved transfer to another treatment provider."

2. Successful

Current Definition:

SUCC – Successful is used when offender completed all the requirements established by the provider. Not intended to reflect how well the offender performed in treatment just that the requirement/ condition was met.

Proposed addition:

SUCC - "This requires confirmation of the successful completion by the treatment provider." "SUCC is also used if the offender is referred for an evaluation and the evaluator determines that treatment is not recommended at this time."

3. Unsuccessful

Current Definition:

UNSU – Unsuccessful is used when the offender did not complete all of the requirements established by the treatment provider. Not intended to reflect how well the offender performed while in treatment just that the requirement/condition was not met.

Proposed addition:

UNSU - "… or did not engage in treatment as directed/referred".

TREATMENT MODULE
FLOWCHART

All Inclusive Treatment Provider
(Eval and Tx Provided)

Client refered to Provider for Evaluation and any recommended Treatment

↓

CIS Entry - Tx Referral

Eval completed - Tx Recommended | Eval Completed Tx **NOT** Recommended | Eval **NOT** Completed | EVAL **NOT** Completed - Case Expiration

- Eval completed - Tx Recommended → CIS Entry - Tx Entry Date → CIS Entry - Tx Completion Date and Closure Code
- Eval Completed Tx **NOT** Recommended → CIS Entry - F4 modification to EVAL only → CIS Entry - MXBN Closure Code
- Eval **NOT** Completed → CIS Entry - F4 modification to EVAL only → CIS Entry - UNSU Closure Code
- EVAL **NOT** Completed - Case Expiration → CIS Entry - F4 modification to EVAL only → CIS Entry - EXPI Closure Code

Multiple Treatment Agencies
(Eval and Tx conducted at separate providers)

Client refered to Provider for Evaluation Only

↓

CIS Entry - Tx EVAL Code

Eval completed - Tx Recommended | Eval completed - Tx **NOT** Recommended | Eval **NOT** Completed | Eval **NOT** Completed - Case Expiration

- Eval completed - Tx Recommended → CIS Entry SUCC Closure Code → CIS Entry - NEW Tx Referral / Entry Date → CIS Entry - Tx Completion Date and Closure Code
- Eval completed - Tx **NOT** Recommended → CIS Entry MXBN Closure Code
- Eval **NOT** Completed → CIS Entry UNSU Closure Code
- Eval **NOT** Completed - Case Expiration → CIS Entry EXPI Closure Code

Using the New EVAL Treatment Type code for FAUG 11/15/21

In order to distinguish between an evaluation where no treatment is recommended, which inflates treatment data, and treatment as recommended, the OACCD Treatment Workgroup recommends the addition of a new treatment type EVAL.

EVAL will look like other treatment types, i.e. SUBS, ANGR, but will clearly show as an evaluation only, and can be pulled out from regular treatment attendance. The Workgroup met with FAUG reps, who recommended adding one EVAL treatment provider per type, per County; Substance abuse eval, Anger Management eval, etc. As a recap and including approvals from OACCD:

- Each county will identify EVAL per County/per type. Example below using Multnomah as the County:
    - Mult-EVAL AG - Anger Management Evaluation
    - Mult-EVAL SX - Sex Offender Evaluation
    - Mult-EVAL DV - Domestic Violence Evaluation
    - Mult-EVAL MH - Mental Health Evaluation
    - Mult-EVAL SB - Substance Use Evaluation

- When utilizing an EVAL code **where the evaluator IS NOT the same as the treatment provider**, a note entry would need to be included to identify where (what agency) the client obtained the evaluation from. When the Evaluation is completed - closure code entry is as follows:
    - SUCC - Evaluation was completed and treatment WAS recommended. A new treatment referral is necessary and would be completed with the appropriate treatment closure code. OACCD does NOT support the EVAL line modification with an F4 key entry; this modification calls into question the integrity of the data.
    - UNSU - Evaluation was NOT completed.
    - MXBN - Evaluation was completed and NO treatment was recommended. Approval was provided by OACCD on 9/9/21 to utilize this closure code with the understanding that the definition will need to be updated in the manual.
- When entering an evaluation **where the evaluator IS the same as the treatment provider**, the referral for treatment would be entered as usual, so would NOT be entered as an EVAL type, and would be completed with the appropriate code if treatment was recommended.
    - MXBN - Evaluation was completed and NO treatment was recommended. Approval was provided by OACCD on 9/9/21 to utilize this closure code with the understanding that the definition will need to be updated in the manual. The treatment line would be modified to an EVAL type line using the F4 key entry.

Entering the Treatment Provider Information in CIS:
Examples entering EVAL Treatment Providers using Multnomah County:

```
CMS102I              Corrections Information Systems            9:02:39
CUMMINSL          Work with Community Treatment Programs        6/16/21


                                   Position to . . . . . _____

Enter option...
   2=Change    3=Copy    4=Delete    5=Display    12=Work with assignments


Opt Program     Type Name                    Phone Number Sx Rs In Wt
    MULT-EVAL AG EVAL EMPOWERMENT CLINIC ANGER MGMT  503-676-3710  A  N  Y  N
    MULT-EVAL DV EVAL EMPOWERMENT CLINIC SUB ABUSE   503-676-3710  A  N  Y  N
    MULT-EVAL MH EVAL EMPOWERMENT CLINIC SUB ABUSE   503-676-3710  A  N  Y  N
    MULT-EVAL SB EVAL EMPOWERMENT CLINIC SUB ABUSE   503-676-3710  A  N  Y  N
    MULT-EVAL SX EVAL EMPOWERMENT CLINIC SUB ABUSE   503-676-3710  A  N  Y  N
    MULT-FOCUS    DV   FOCUS CIRCLE            503-930-8799  A  N  Y  N
    MULT-FREE     SUBS FREEDOM HOUSE MINISTRIES    503-347-9966  M  Y  Y  N
    MULT-GENESIS SUBS GENESIS                  503-535-1151  A  N  Y  N
    MULT-GIFT     COGN GIFT                    503-988-4999  A  N  Y  N
    MULT-GRSHMAN ANGR GRESHAM URGENT CARE      503-666-5050  A  N  Y  N
    MULT-GRSHMDV DV   GRESHAM INTIMATE VIOL. PRGRM  503-465-6656  A  N  Y  N
    MULT-HARBOR   SUBS HARBOR LIGHT, SALVATION ARMY 503-235-4192  M  Y  Y  N
                                                          More...
F3=Exit      F5=Refresh    F6=Create    F10=Print     F11=Menu bar
F12=Cancel   F13=Repeat    F17=Subset
```

The information entered in the Treatment Provider screen can be customized for Evaluations only:

```
CMS103I                  Corrections Information Systems              9:53:58
CUMMINSL                  Community Treatment Program                  6/16/21
                                                      CHANGE
Program ID.......... MULT-EVAL AG


Program type........ EVAL   Treatment Evaluation Only
Program name........ EMPOWERMENT CLINIC ANGER MGMT
Contact name........ MIKE BRAXTON
Phone number........ 503-676-3710
Site address........ 3311 NE MARTIN LUTHER KING BLV
City State Zip...... PORTLAND              OR   972120000
Service area........ MULT   Multnomah
Comments............ EVALUATIONS ONLY


Takes indigent Y/N.. Y      Sexes treated....... A
Waiting list........ N      Date available...... 7/01/2021
Residental program.. N      Ave program length..    1 D  Days


Program expired..... N      Program Assess (EBP):
                            Program Asses Date..:


F3=Exit    F4=Prompt    F5=Refresh    F6=Create    F7=Browse backward
F8=Browse forward      F11=Menu bar               F12=Cancel
```

<u>Referring the Client to an Eval in CIS Where the Evaluator is NOT the same as the Provider:</u>
When referred out to an Evaluation, the user would enter in the Treatment program like any other referral,
choosing their County Evaluation provider for the individual treatment type.

```
CMS203I               Corrections Information Systems          9:35:15
CUMMINSL                 Work with Offenders Summary            6/16/21

Caseload number . . .  2325   FATA, PAULA
                                   Position to . . .  _____
Enter option...
     24  ................
     30  : CMS304I              Treatment Program
pt 0  :  Offender: 03                              Change          ustody: 02  :
13 C  :  Enter Option                                              nt Pgm      :
     C  :  2=Edit Treat   Offender: 03878428  CHEEVER, JAMES ANDREW            :
     C  :                                                          *ALL        :
     C  :     Treatment   Treatment ID: MULT-EVAL SX M57Tx: N Y/N  Code I Cust :
     D  :  2  MULT-EVAL                                              N    02   :
     D  :             Refer date  Entry Date  Exit Date/code  I                :
     D  :              6/16/2021  _____  _____  _____ N              :
     D  :                                                                      :
     E  :             Eval Only                                                :
     E  :             _____    Bottom      :
     :                                          More...                        :
F3=E  :  F4=Prompt      F4=Prompt F5=Refresh    F7=Dsp Treatment               :
F12=  :                 F12=Cancel                                             :
     :.........................................................................:
```

```
CMS203I               Corrections Information Systems          9:35:15
CUMMINSL                 Work with Offenders Summary            6/16/21

Caseload number . . .  2325   FATA, PAULA
                                   Position to . . .  _____
Enter option...
     24  ................
     30  : CMS304I              Treatment Programs
pt 0  :  Offender: 03878428  CHEEVER, JAMES ANDREW                             :
13 C  :  Enter Option:                         Current Custody: 02            :
     C  :  2=Edit Treatment Rec  4=Delete Treatment  5=Display Treatment Pgm   :
     C  :              *ALL *ALL                               *ALL           :
     C  :     Treatment   Cnty Type  Referred     Entered  Exit date  Code I Cust :
     D  :  MULT-EVAL SX MULT EVAL  6/16/2021                      N    02     :
     D  :                                                                      :
     D  :                                                                      :
     D  :                                                                      :
     D  :                                                                      :
     E  :                                                                      :
     E  :                                                    Bottom           :
     :                                                                         :
F3=E  :  F4=Prompt    F6=Add    F10=Print    F12=Cancel                        :
F12=  :                                                                        :
     :.........................................................................:
```

If the evaluation was completed and does NOT recommend treatment, another comment would be added stating treatment was not recommended, and the referral would be closed to MXBN.

NOTE: A recommendation came from FAUG to use MXBN for an individual who successfully completes an EVAL and no treatment is recommended. This would allow the PO's (at a glance) to see whether treatment was

or was not recommended on an EVAL and would eliminate the need to enter the record to review the note. The use of MXBN code would delineate records through reports.

OACCD's previously approved definition of MXBN would need to be changed to accommodate successful closure for Evaluations and is currently a Neutral (admin) closure code: Max Benefit - The offender has not met the requirements for the program to successfully complete, but the offender has obtained all information they can from the program and it is no longer appropriate for them to attend.

```
CMS203I              Corrections Information Systems            11:34:38
CUMMINSL               Work with Offenders Summary             11/16/21

Caseload number . . . 2325  FATA, PAULA
                                   Position to . . .
Enter option...
    2=
    8=  : CMS304I              Treatment Program
pt O  : Offender: 03                              Change    ustody: 02
13  C : Enter Option                                        nt Pgm
    C : 2=Edit Treat   Offender: 03878428  CHEEVER, JAMES ANDREW   *ALL
    C :                                                      Code I Cust
    C :       Treatment  Treatment ID: MULT-EVAL SX M57Tx: N  Y/N       N   02
    D : 2  MULT-EVAL
    D :                 Refer date  Entry Date  Exit Date/code  I
    D :                  6/16/2021   6/16/2021   6/16/2021  MXBN N
    D :
    E :                 No TX recommended
    E :
    F :                                          More...          Bottom
    :                 F4=Prompt F5=Refresh    F7=Dsp Treatment
F3=E  : F4=Prompt      F12=Cancel
F12=  :                TREAT-ID record updated.
```

```
CMS203I                 Corrections Information Systems            11:34:38
CUMMINSL                   Work with Offenders Summary             11/16/21


Caseload number . . .  2325   FATA, PAULA
                                       Position to . . .
Enter option...
   2= :...............................................................
   8= : CMS304I                  Treatment Programs                      :
pt 0 : Offender: 03878428 CHEEVER, JAMES ANDREW                         :
13 C : Enter Option:                            Current Custody: 02     :
   C : 2=Edit Treatment Rec  4=Delete Treatment  5=Display Treatment Pgm:
   C :             *ALL *ALL                              *ALL          :
   C :     Treatment    Cnty Type  Referred    Entered  Exit date Code I Cust :
   D : _   MULT-EVAL SX MULT EVAL  6/16/2021  6/16/2021  6/16/2021 MXBN N  02 :
   D :                                                                  :
   D :                                                                  :
   D :                                                                  :
   E :                                                                  :
   E :                                                                  :
   F :                                                        Bottom    :
                                                                        :
F3=E : F4=Prompt   F6=Add   F10=Print    F12=Cancel                     :
F12= :                                                                  :
     :..................................................................
```

If the evaluation was completed and recommends treatment, the EVAL entry would be closed to SUCC and a referral would be made to the appropriate treatment provider as usual:

```
CMS203I                 Corrections Information Systems            11:34:38
CUMMINSL                   Work with Offenders Summary             11/16/21


Caseload number . . .  2325   FATA, PAULA
                                       Position to . . .
Enter option...
   2= :.............                                         ...........
   8= : CMS304I                   Treatment Program                     :
pt 0 : Offender: 03                               Change               :
13 C : Enter Option                                          ustody: 02 :
   C : 2=Edit Treat  Offender: 03878428 CHEEVER, JAMES ANDREW  nt Pgm   :
   C :                                                         *ALL     :
   C :     Treatment  Treatment ID: MULT-EVAL SX M57Tx: N Y/N  Code I Cust :
   D : 2   MULT-EVAL                                            N   02  :
   D :               Refer date  Entry Date  Exit Date/code  I          :
   D :                6/16/2021   6/16/2021   06162021   SUCC N          :
   D :                                                                  :
   E :               TX recommended.  Refer to MULT-AHEAL.             :
   E :                                                                  :
   F :                                           More...      Bottom    :
   F :                                                                  :
     :               F4=Prompt F5=Refresh    F7=Dsp Treatment          :
F3=E : F4=Prompt     F12=Cancel                                        :
F12= :                                                                  :
     :.............                                         ...........
```

```
CMS203I                    Corrections Information Systems              14:08:25
CUMMINSL                     Work with Offenders Summary                 6/16/21

Caseload number . . . 2325  FATA, PAULA
                                          Position to . . . . _____
Enter option...
   24  ....................................................................
   30  : CMS304I                  Treatment Programs                          :
pt 0  : Offender: 03878428 CHEEVER, JAMES ANDREW                            :
13  C  : Enter Option:                            Current Custody: 02        :
    C  : 2=Edit Treatment Rec   4=Delete Treatment   5=Display Treatment Pgm :
    C  :              *ALL *ALL                        *ALL                   :
    C  :    Treatment    Cnty Type  Referred    Entered  Exit date  Code I Cust :
    D  : _  MULT-EVAL SX MULT EVAL  6/16/2021  6/16/2021 6/16/2021  SUCC N  02 :
    D  :                                                                       :
    D  :                                                                       :
    D  :                                                                       :
    D  :                                                                       :
    E  :                                                                       :
    E  :                                                           Bottom      :
       :                                                                       :
F3=E  : F4=Prompt   F6=Add   F10=Print   F12=Cancel                          :
F12=  :                                                                       :
       ....................................................................

CMS203I                    Corrections Information Systems              11:46:11
CUMMINSL                     Work with Offenders Summary                11/16/21

Caseload number . . . 2325  FATA, PAULA
                                          Position to . . . . _____
Enter option...
   2=  ....................................................................
   8=  : CMS304I                  Treatment Programs                          :
pt 0  : Offender: 03878428 CHEEVER, JAMES ANDREW                            :
13  C  : Enter Option:                            Current Custody: 02        :
    C  : 2=Edit Treatment Rec   4=Delete Treatment   5=Display Treatment Pgm :
    C  :              *ALL *ALL                        *ALL                   :
    C  :    Treatment    Cnty Type  Referred    Entered  Exit date  Code I Cust :
    D  : _  MULT-EVAL SX MULT EVAL  6/16/2021  6/16/2021 6/16/2021  SUCC N  02 :
    D  : __ MULT-AHEAL   MULT SXTX  6/16/2021                            N  02 :
    D  :                                                                       :
    D  :                                                                       :
    E  :                                                                       :
    E  :                                                                       :
    F  :                                                           Bottom      :
       :                                                                       :
F3=E  : F4=Prompt   F6=Add   F10=Print   F12=Cancel                          :
F12=  :                                                                       :
       ....................................................................
```

If the evaluation was not completed, the EVAL line would be closed to UNSU:

```
CMS203I              Corrections Information Systems          14:08:25
CUMMINSL               Work with Offenders Summary            6/16/21


Caseload number . . . 2325  FATA, PAULA
                                      Position to . . .
Enter option...
     24 ....................................................................
     30 : CMS304I                 Treatment Programs                        :
pt O  : Offender: 03878428 CHEEVER, JAMES ANDREW                            :
 13 C : Enter Option:                           Current Custody: 02         :
    C : 2=Edit Treatment Rec  4=Delete Treatment  5=Display Treatment Pgm   :
    C :          *ALL *ALL                                *ALL              :
    C :    Treatment   Cnty Type  Referred      Entered  Exit date Code I Cust :
    D :    MULT-EVAL SX MULT EVAL  6/16/2021             6/16/2021 UNSU N  02  :
    D :                                                                    :
    D :                                                                    :
    D :                                                                    :
    D :                                                                    :
    E :                                                                    :
    E :                                                      Bottom        :
                                                                          :
 F3=E : F4=Prompt   F6=Add   F10=Print   F12=Cancel                        :
 F12= :                                                                    :
      :...................................................................:
```

Referring the Client to an Eval in CIS Where the Evaluator IS the same as the Provider:

An alternate method was approved for those cases where the evaluator is the same company as the treatment provider. Entry would be done the same as any referral to regular treatment:

```
CMS203I                  Corrections Information Systems            11:53:52
CUMMINSL                   Work with Offenders Summary              11/16/21


 Caseload number . . .  2325   FATA, PAULA
                                         Position to . . .  _____
Enter option...
   2=  ..................................................................
   8=  : CMS304I                   Treatment Programs                      :
pt 0  : Offender:  03878428  CHEEVER, JAMES ANDREW                         :
13  C  : Enter Option:                          Current Custody: 02        :
    C  : 2=Edit Treatment Rec   4=Delete Treatment   5=Display Treatment Pgm :
    C  :            *ALL *ALL                              *ALL             :
    C  :    Treatment    Cnty Type  Referred    Entered  Exit date  Code I Cust :
    D  :    MULT-AHEAL    MULT SXTX  6/16/2021                       N   02  :
    D  :                                                                    :
    D  :                                                                    :
    D  :                                                                    :
    E  :                                                                    :
    E  :                                                            Bottom  :
    F  :                                                                    :
       :                                                                    :
F3=E  : F4=Prompt    F6=Add    F10=Print    F12=Cancel                     :
F12=  :                                                                    :
       ..................................................................
```

If the referral results in treatment being recommended, the PO would not need to make a new entry but would only need to close the treatment line with the appropriate closure code when the treatment line is completed. No record of the EVAL only would be kept.
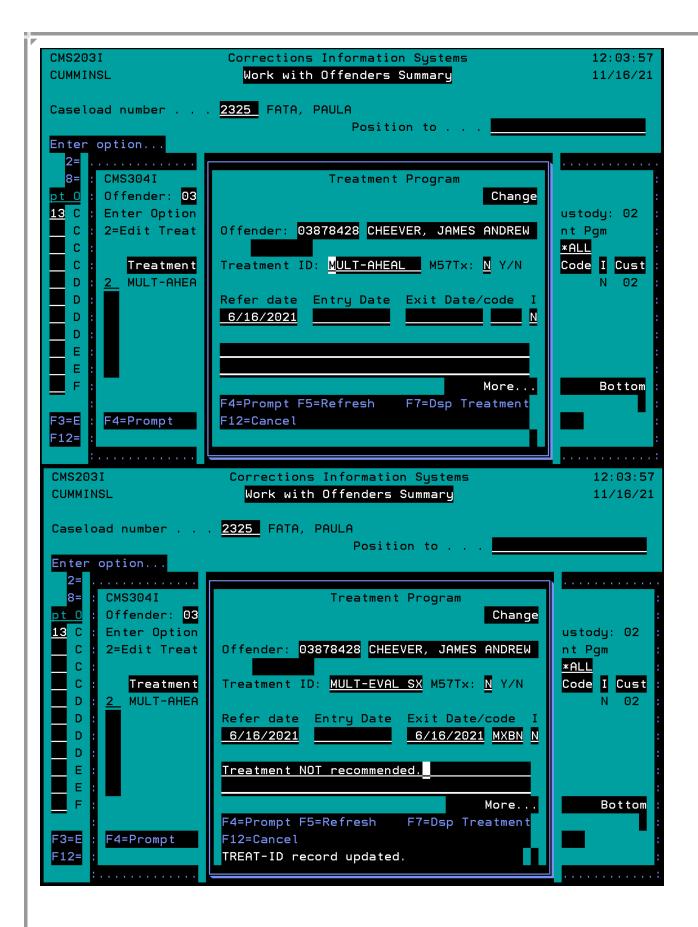
If the referral results in treatment NOT being recommended, the PO would change the treatment referral type from the original program type to EVAL by changing the Treatment ID field to the appropriate EVAL program type by either overtyping the field with the correct code or using the F4 key to prompt the treatment types and picking the correct provider. The completion code would be MXBN:

```
CMS203I                 Corrections Information Systems        12:03:57
CUMMINSL               Work with Offenders Summary            11/16/21


Caseload number . . . 2325  FATA, PAULA
                                Position to . . . . _____
Enter option...
    2= ...............
    8= : CMS304I              Treatment Program                : ...............
pt 0 : Offender: 03                                 Change    : ustody: 02  :
13  C : Enter Option                                           : nt Pgm      :
    C : 2=Edit Treat  Offender: 03878428  CHEEVER, JAMES ANDREW : *ALL        :
    C :                                                        : Code I Cust :
    C :      Treatment  Treatment ID: MULT-AHEAL   M57Tx: N Y/N :     N   02  :
    D : 2  MULT-AHEA                                            :
    D :              Refer date  Entry Date  Exit Date/code  I :
    D :               6/16/2021  _____  _____  ____ N :
    E :                                                        :
    E :                                                        :
    F :                                          More...       :     Bottom  :
    F :           F4=Prompt F5=Refresh    F7=Dsp Treatment      :
F3=E : F4=Prompt  F12=Cancel                                    :
F12= :                                                          :
     : ...............                                          : ...............
```

```
CMS203I                  Corrections Information Systems              12:03:57
CUMMINSL                  Work with Offenders Summary                 11/16/21


Caseload number . . .  2325   FATA, PAULA
                                        Position to . . .
Enter option...
   2=
   8= :  CMS304I                  Treatment Programs
pt 0 :  Offender: 03878428  CHEEVER, JAMES ANDREW
13 C :  Enter Option:                            Current Custody: 02
   C :  2=Edit Treatment Rec  4=Delete Treatment  5=Display Treatment Pgm
   C :                *ALL *ALL                                *ALL
   C :      Treatment    Cnty Type  Referred      Entered  Exit date  Code I Cust
   D :      MULT-EVAL SX MULT EVAL  6/16/2021              6/16/2021  MXBN N  02
   D :
   D :
   D :
   E :
   E :
   F :                                                              Bottom

F3=E :  F4=Prompt    F6=Add    F10=Print    F12=Cancel
F12= :
```

Comments may need to be changed/added to the record, removal of date(s) may also need to be done.