

FAUG AGENDA – CLACKAMAS COUNTY

November 9th and 10th

MEETING LOCATION:

Public Safety Training Center
12700 SE 82nd Ave
Clackamas, OR 97015

DAY ONE: 1pm-5pm

Introductions/Welcome/Housekeeping

Clackamas County

Minute Review

Group

Judy sent corrections to Andie who will send to the group.

Attendance

Charles Adler

Marne Pringle (Clackamas); Heather Senquiz (Clatsop); Justin Bendele (Deschutes); Michelle Mooney (DOC); Tina Potter (Gilliam-Wheeler); Kara Erwen (Jackson); Joe Swepe (Lane); Zeth Allen (Lincoln); Bonnie Timberlake (Linn); Dylan Arthur (Parole Board); Randy Henderson (Polk); Kimberly Hulke (Wasco-Sherman); Summer Bathke (Wasco-Sherman); Nathan Bregel (Washington); Betti Spencer (Yamhill); Pedro Castaneda (Yamhill);

County Updates

Group

Douglas: Supervision position filled and interviewing for PPO

Klamath: Supervisor position open

Marion: two PPO openings

Washington: several PPOs have returned from academy, filling Director position

Polk: two PPOs are going to the academy

Wasco/Sherman: lost a PPO and not filling the position, hired new Support Staff

Linn: one PPO retiring next month and filling the position

Jackson: hiring for Supervisor position

Lane: two starting next 2 weeks, 2 retiring and working on list for positions

Deschutes; building addition/remodel going well and potentially completing in April/May

Clatsop Co: one PPO graduating academy

Email Updates

Andie Cortes

Any emails sent between quarterly FAUG meetings will be added to the agenda. We will also be creating a Decision Log to mirror SOON's minutes.

*Marne sent an email asking for any examples of AIP rules other counties are using. Also the Survivor Panel (SCARS) does not meet the criteria for the treatment module.

*Roseanna sent an email about entering new conditions in LEDS. It was suggested that this issue be addressed in SOON.

*Michelle sent an email about generating ideas for trainings at upcoming FAUG meetings. She suggested one that OACC provided called Outward Mindset. She will follow up to see if it is still an option for FAUG.

*Denise Sitler is looking into adding a column for "Victim Notification" to the EDIS reports.

*Judy sent an email about a programming glitch (mainly affecting the institution): if a client is added to a caseload as secondary before they are discharged, that client is removed from the caseload and unable to be re-added. Once programming is in place, if you had someone added as secondary before discharge and see that the client is off the caseload, just add as secondary again.

Interstate Compact

Ruby McClorey

When Oregon receives a Request for Reporting Instructions and the client is already on supervision, the Interstate Compact Office will assign the case to the county of supervision regardless of the address. The Interstate Compact Office is not approving the residence, just allowing the client to be in Oregon during compact investigation. The supervising agency can then send an IRT. This information is in the OPS manual:

- **Ops Manual 3.1.3** *“If an offender is already under supervision in Oregon in a county different from the proposed residence, the supervising county must investigate the case and then IRT the offender to the county of proposed residence after acceptance. You can ask for courtesy assistance from the county of the proposed residence to investigate the address.”*

An Interstate Compact Coordinator meeting is still in the works. Also, a documentary (The Road Home) was made at the Annual Business meeting and Mark will be sending it to the Directors.

STTL

Mark Patterson

STTL Orders outline conditions in the first paragraph “you will adhere to the conditions of your release...” and we sanction based on those conditions. Suggested to reformat the STTL Order so the conditions can be listed and mirrored in the sanction module. An STTL Training is in the works.

Parole Board

Dylan Arthur

The two new Parole Board members Kelly Kukenski and Ronnie Kliewer were confirmed by the Senate. There is a new IT position (filled), this person will be specifically working with Parole Board Management System.

Dylan recently sent a memo about updated condition concerning Special Condition 11/Victim:
I wanted to inform you all of a recent policy change the Board has made regarding when, and under what circumstances, victims will be added to SC #11. The Board will no longer be restricting the addition of victims for person crimes only, or for only victims of property crimes where the victims were known by the AIC. The Board has decided that any victim from any crime that a person is on PPS or parole for, will be added to SC #11. When Release Counselors are putting together release packets, they should be documenting in the notable issues section every victim from a case that the person is on PPS or parole supervision. The Board will then add those victims to SC #11. The Board will now also be including businesses as victims. They will NOT however be adding the State of Oregon to SC #11 in cases where the state itself was a victim, (i.e. fraud cases). The Board will still use their discretion on a case by case basis when deciding whether victims from prior offenses should be added to SC #11. If a victim is registered with the Board, and they are a victim of a current supervised case, then the victim will be added automatically. However, if a victim who registered with the Board in the past is from a prior case, then the Board will evaluate that on a case by case basis. If you believe a victim from a prior case should be added to SC #11, please let the Release Counselor know. If the orders have already been voted and issued by the Board, but the individual has not been released from custody please email our Orders Desk requesting the additional victims.

No changes are being made to our existing procedures for when we will add persons with restraining orders or stalking orders.

For existing cases, if you believe a victim should be added under the Board’s revised policy, this will need to be done with the normal process (either at time of a sanction or with a Consent to Modify).

The Parole Board Roadshow is up and running. This presentation is beneficial and has been attended by Parole/Probation Officers, Supervisors, Support Staff, DOC Staff, District Attorney’s Office, Jail Staff, etc.

- Yamhill- January 5th, 2023 (8-12)
 - 615 NE 6th St. McMinnville OR 97218
- Linn- January 19th, 2023 (9:30-1:30)
 - 1117 Jackson St. SE Albany OR 97322
- Clatsop- January 26th (9-1)
 - 1190 SE 19th Street, Warrenton, OR 97146
 -

SOSN brought up an issue that warrants are disappearing in LEDS. Warrants accessed via ODL is producing 'near hits' only. This is likely a LEDS 2020 issue. Douglas County had this issue happen, Andie called the Officer who was able to retrieve the warrant using the SID.

The Parole Board is recruiting for a Hearings Officer:

We are currently recruiting for a Correctional Hearings Officer and a Correctional Hearings Specialist, in a Limited duration / Job Rotation capacity! These positions are a result of the passing of SB 1008 – for Juveniles. Because these are NOT permanent positions with the Board, if a candidate from a partner agency is selected, we are VERY willing to do a job rotation! These positions need to be filled ASAP!

This is a FANTASTIC OPPORTUNITY to Work with the Board members, Executive Management and Board staff and learn what role the Board of Parole plays, as well as an opportunity for Hybrid (remote) working!

If you have an EDIS eligible PPS/LC case under the Parole Board jurisdiction, send an email to the Parole Board (and include Dylan) to advise that the EDIS eligible case is PPS/LC.

There was a question about clients going to abscond on old conditions, then arrested and released before a sanction can be imposed. How should the PPO address the violation (old vs new) in that next sanction? Will be seeking further clarification from the Parole Board. There is a request to have all the Parole Board orders (included amended) available in DOC400. Send an email to: Orders.BOPPPS@doc.state.or.us to request the newest PPS order, if needed.

Please do not try to edit PPS/BRD warrants after they have been electronically submitted to the Parole Board. Send an email if you need modify it. There may already be an edit prohibiting any editing, Michelle will check. Sometimes changing a PPS/LC warrant status automatically sends the warrant to the Parole Board.

If a PPO disagrees with requested conditions in a Release Plan, please send an email to the Parole Board Order's desk with your recommendations instead of entering that information in OMS.

OACCD

Jodi Merritt (not present)

Statewide supervised population down by 26%. They were anticipating a \$50 million reduction in funding going into the biennium. However, this has been reduced to \$22 million reductions which isn't great but is better than the \$50 million shortfall.

Due to the anticipated shortfall of funding, the OACCD Legislative Committee is working on their message/request to continue funding at the current levels. Outcomes will depend on the structure of the Legislator and the new Governor.

The Back on Track program resulted in a small number of clients turning themselves in on warrants. Not every county participated in this program.

DOC Update

Michelle Mooney

There are several Service Requests pending and in the queue. If you are wondering if there is something pending, please reach out to Michelle.

Completed/old Release Plans are not removed from PPO's caseloads in OMS because the original project was designed to keep all records and only display what the user selects for filters. The date filter automatically defaults to a two year block (this was requested by the release counselors) so if the user does not change the date filter, they will get old records. If a PPO wants to only see current release plans, they can change the filters and dates to display. There is a pending service request that when it moves forward we could evaluate these filters and defaults and potentially update them.

Documents have a small window of time to live in OMS (6 months) before they disappear due to a storage issue. This affects release plans, especially after clients who fail transleave. Currently, Release Counselors are typing over previous release plans but there are concerns about this as it effects historical documentation. Michelle will review this process with the institution.

The FAUG contact address has moved. Please update your address books to reflect the new email address of FAUG@OMLS.oregon.gov. Please share this with others in your office that may use the FAUG contact list. The old FAUG DL will be forwarded until the New Year and will then be discontinued. If you have any issues with the new address please let Michelle know.

Training/Topic for FAUG meetings to include reviewing basic FAUG functions. FAUG duties can be broken up into mini-trainings. Charles is presenting FAUG 101/Basic Overview tomorrow. If you have any other ideas, please let Michelle know. It will be beneficial to make an F7 available for these trainings.

The report for sanctions in other than complete is getting lengthy again. Please encourage PPOs to follow through with these SRFs. The SRFs in DEFR and RETU pending out of custody hearing will be outstanding until hearing is conducted. Remember, you need to update the Old/New Conditions flag to reflect the correct conditions to violate. If you are getting PPS/BRD conditions with only special condition (not new general conditions) the case is likely not moving to new conditions (example: extending ASR dates).

SB1510 Update

Michelle Mooney

Phase II for Parole Board conditions is in effect. All asterisks should be removed from cases. Michelle is now providing two reports to flag new conditions "SB1510 General Conditions.. (N=New GC, O=Old GC)":

1. All new cases requiring the new conditions flag.
2. Clean up report for who have had an action prompting the new conditions.

Clackamas County Impact Grant

Marne Pringle

Marne provided a training about creating new merge documents. Please see Appendix A. for reference.

DAY TWO: 9am-12pm

FAUG 101

Charles Adler

Charles will be sending the FAUG Manual to the newest FAUG members (once it is finalized). The OACCD website hosts the FAUG minutes, charter, etc. Let Charles know if you want a mentor.

Roles and Responsibilities FAUG Representatives:

- Responsible for analyzing identified issues, proposed changes, or concerns and providing recommended solutions to OACCD
- Point of contact for DOC, outside agencies and other FAUG members
- Responsible for system maintenance within their counties
- Responsible for maintaining and updating the Treatment Module in CIS
 - FAUG reps need to review the treatment module every six months.
- Responsible for returning structured sanctions to pending status in the Sanction Module in CIS
 - FAUG does not have this authority for PPS/BRD cases but able to modify probation and PPS/LC cases.
 - If an SRF is sent to the Parole Board in error, Michelle needs to return the sanction to PEND status.
- Responsible for appropriate deletion of case plans in the DOC LS/CMI database
- Responsible for updating polygraph records to correct test date, type, and results, and deleting records entered on the wrong person or in error
- Develop long-range plans for development of service requests/projects to meet agency needs to further enhance use of CIS, OMS, and the tracking of adults on supervision (AOS)
- Prioritize service requests and projects with DOC
- Participate in user testing for service requests or provide a list of other users from respective county that can participate. Provide training and information within respective counties as well as other county offices
- Creates and maintains document templates. Some Counties have SOON
- Create, update, and maintain system manuals

FAUG resources can be accessed on the OACCD website and DOC Help Desk.

Report Creation

Allen Bergstrom

Allen provided a training about creating new merge documents. Please see Appendix B. for reference.

Manual Revisions

Group

The Manual Committee has completed updating the FAUG manual. They are waiting for feedback from OCMN on the LSCMI section but this is the last piece. The next project is the CIS Users Guide. Michelle will ask OACCD if it can be accessed on the FAUG section of their website.

The Manual Committee meets on the first Wednesday of each month at 9am and open to any FAUG member (virtual). Contact Michelle if you would like to attend and she will send the link.

Please contact Michelle if you would be willing to facilitate a mini-training (review Sanctions and/or Training Module) at future FAUG meetings.

Roundtable

Group

Beti: Requesting Spanish version of our forms (please email FAUG if you have any). Also, requesting a merge code for felony/misdemeanor indicators.

Andie: If the Static99 is incomplete after a certain date, it cannot be edited/deleted. Requesting FAUG have authority for this and also authorities in STABLE/ACUTE programs. Michelle will take request to the other network groups.

Michelle: Please utilize comments to indicate the date of update when reviewing Treatment Programs. Right now, DOC's audit stamp is overriding FAUG's review.

NEXT MEETING:

February 15-16, 2023- Lane County

New building with conference room and reserved. Host county to present.

Jeff Hanson training in OMS

Email Michelle with questions in OMS or general. Please try to attend in person.

May 17-18, 2023 Clatsop as backup

AUG 16-17 Deschutes

Appendix A.

CLACKAMAS COUNTY IMPACT GRANT

(PowerPoint)

- ▶ IMPACTS
- ▶ Improving People's access to community-based treatment, supports, services
- ▶ What is it?
- ▶ State-funded grant to address homelessness, mental illness, jail usage, and access to care while supporting the local agencies who are working directly with these clients.

- ▶ OHSU School of Public Health oversight

- ▶ Created by the Behavioral Health Justice Reinvestment Steering Committee

- ▶ Focus on folks who are "overusing" jail beds, ER beds...
"implementing strategies to divert adults with serious and persistent behavioral health needs from the criminal justice system, hospitalizations, and institutional placements."
- ▶ Clackamas County
- ▶ Funds a full-time behavioral health case manager who is embedded at Parole and Probation (Stephanie Jefferson)

- ▶ We are working on hiring a peer support person

- ▶ Focus on homeless, mentally ill, justice-involved individuals who are at risk of hospitalization, holds, jail

- ▶ Weekly and quarterly data collection to track who is utilizing the services and funds as well as how it is being utilized

- ▶ What does IMPACTS look like in Clackamas County?
- ▶ POs simply email Case Mgr Jefferson and PO Loftis with their client who needs assistance.
- ▶ Often POs will staff cases with Case Mgr Jefferson and PO Loftis to assess needs and make an action plan
- ▶ IMPACTS Client: homeless, persistent mental illness, at risk of hospitalization (suicidal, homicidal), multiple ER visits, multiple jail stays for misdemeanor crimes (Crim Trespass, Dis Con, offensive littering, etc).
- ▶ Goal: to get the client stabilized and eventually moved into long term wraparound services: permanent case manager, therapist, prescriber, primary care physician, housing, peer support.
- ▶ IMPACTS in Clackamas County...
- ▶ Can provide: housing assistance, cell phone, food, clothing, mental health triage, medication payment, bus pass, Ride2Care, etc.
- ▶ Often involves meeting clients where they are, transporting them to appointments, getting them to agree to taking medications, following through on appointments, making appointments.
- ▶ Case Mgr: has access to different systems that can assist in access to care for the client. Case Mgr can sit in on office visits, go to home visits.

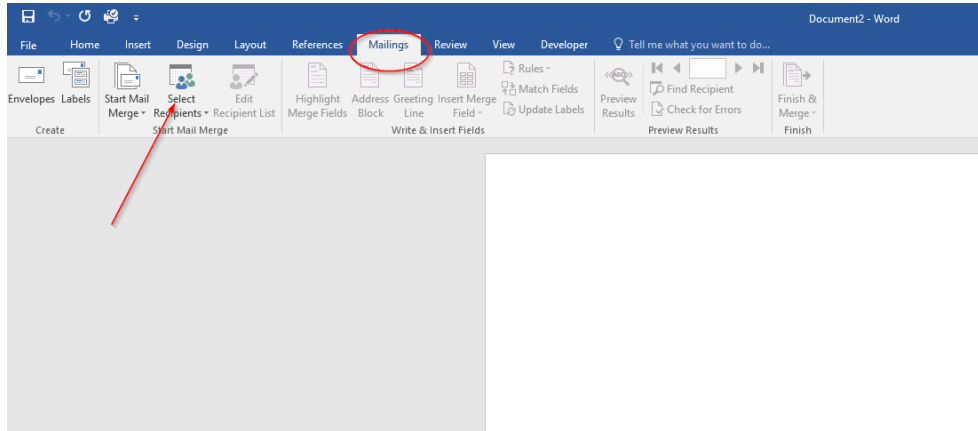
- ▶ POs: have access to a case manager who can help case plan in creative and effective ways.
- ▶ Over 60+ clients being assisted and more added weekly

Appendix B.

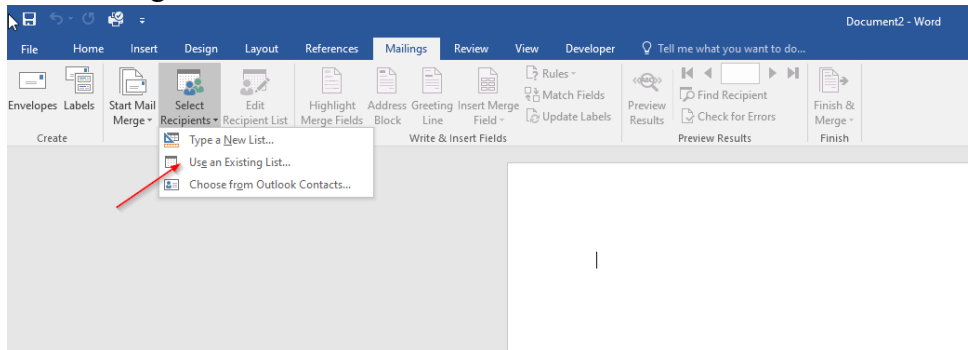
CREATING NEW DOCUMENT

Start with a blank document. In Polk County, most of our documents go on our Letterhead so we use a blank Letterhead document.

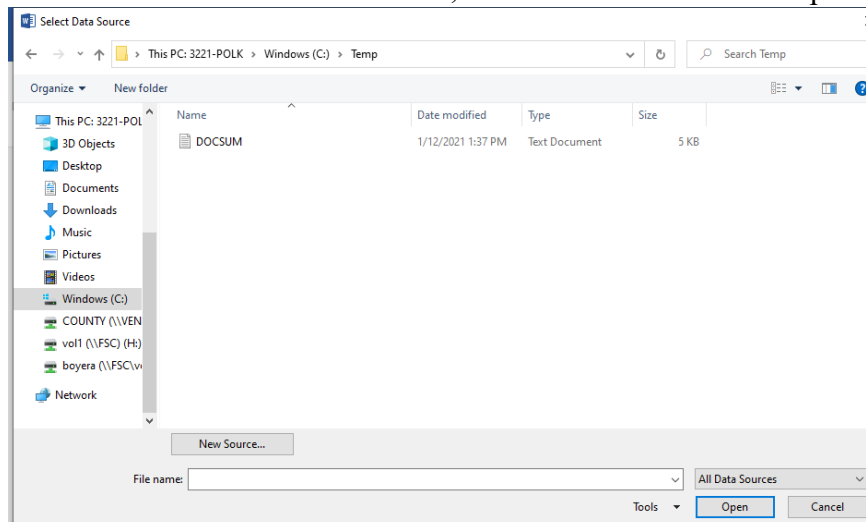
1. Open Word document (either blank or letterhead) and attach data source
 - a. Mailings Tab
 - b. Select Recipients



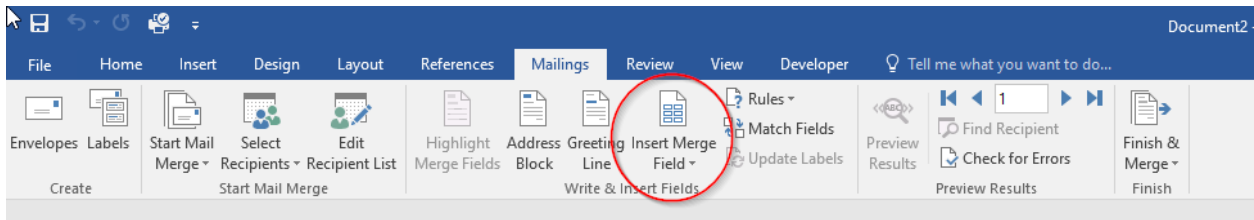
- c. Use existing List



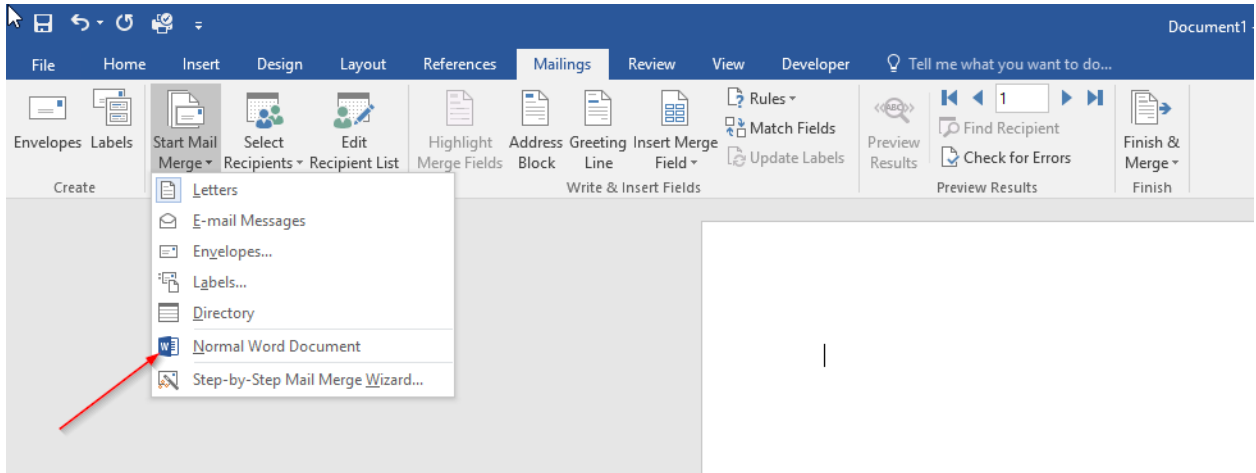
- i. Select the [docsum.txt](#) file. In Polk, this is located in the c:/temp folder



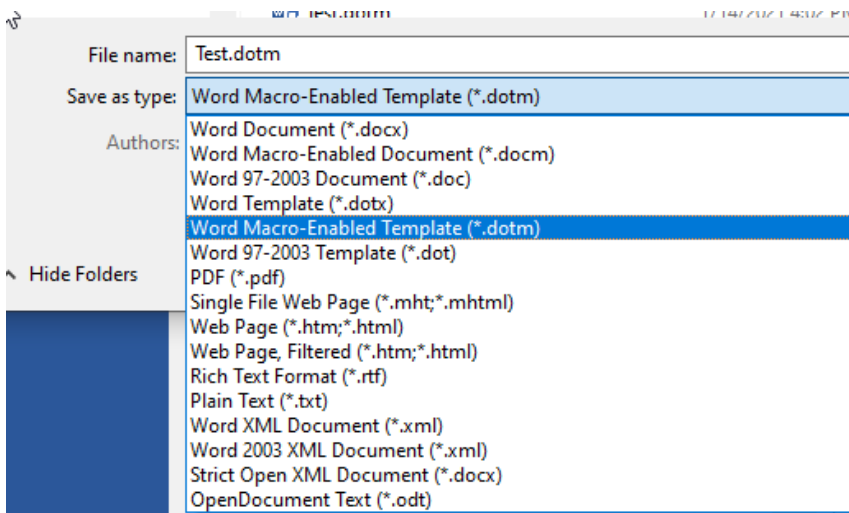
2. Insert Merge Field will now be available



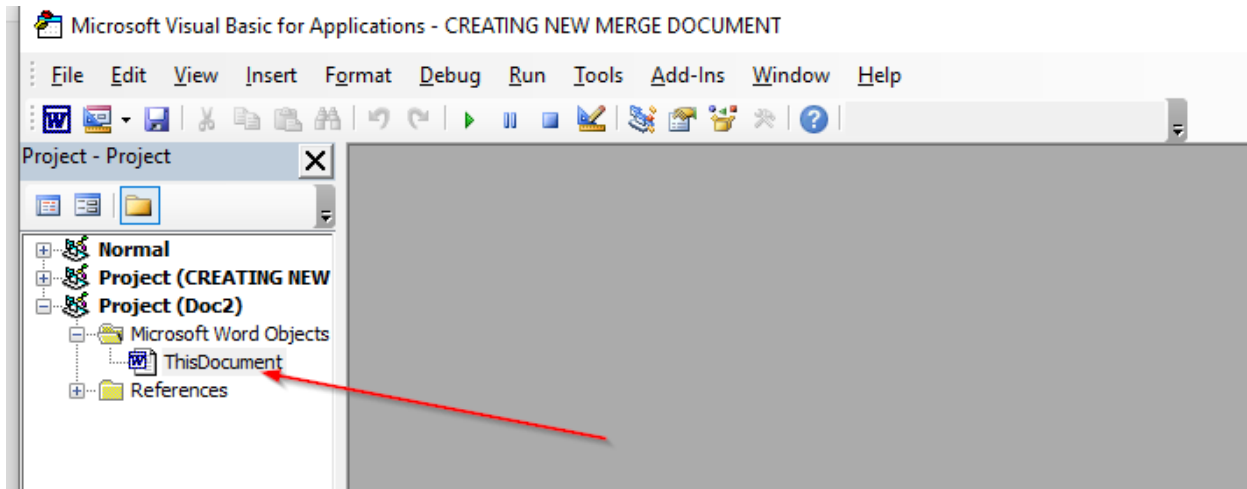
3. Insert your fields into Document. The complete list of merge fields can be located on pages 6 and 7 of the FAUG Rep Manual <https://oaccd.net/field-automation-users-group/>
4. Once your document template is complete with all your merge fields, Select “Start Mail Merge”
 - a. Select Normal Word Document



5. Save file as a Macro Enabled Template



6. Press Alt + F11 to open VBA script field

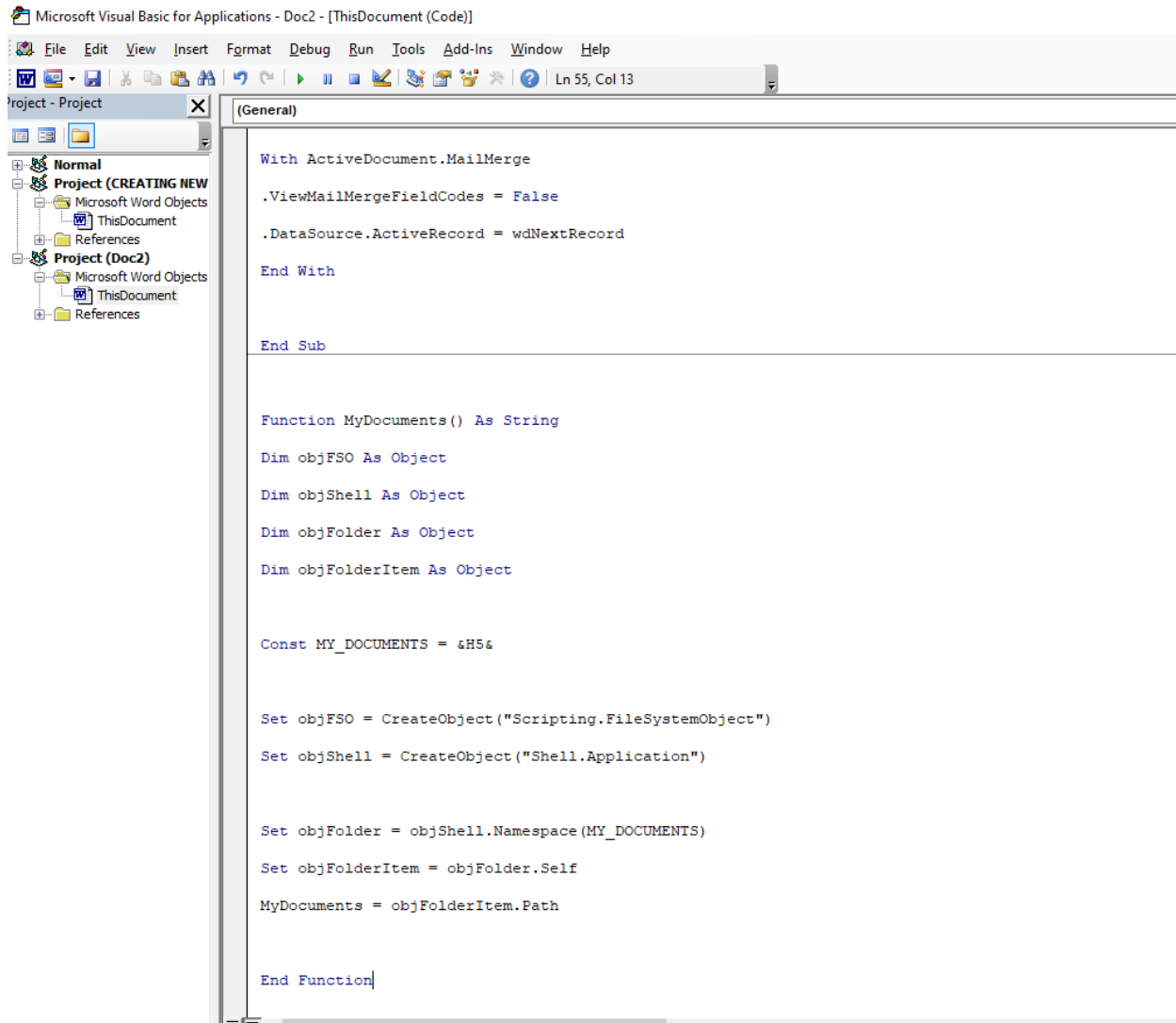


7. Copy and Paste the following code into the window for "ThisDocument"

```
Private Sub Document_New()  
    DocSumPath = "c:\temp\DOCSUM.TXT"  
    ActiveDocument.MailMerge.OpenDataSource (DocSumPath)  
    ActiveDocument.ActiveWindow.View.ShowFieldCodes = False  
    With ActiveDocument.MailMerge  
        .ViewMailMergeFieldCodes = False  
        .DataSource.ActiveRecord = wdNextRecord  
    End With  
End Sub  
  
Function MyDocuments() As String  
    Dim objFSO As Object  
    Dim objShell As Object  
    Dim objFolder As Object  
    Dim objFolderItem As Object  
  
    Const MY_DOCUMENTS = &H5&  
    Set objFSO = CreateObject("Scripting.FileSystemObject")  
    Set objShell = CreateObject("Shell.Application")  
    Set objFolder = objShell.Namespace(MY_DOCUMENTS)  
    Set objFolderItem = objFolder.Self
```

MyDocuments = objFolderItem.Path

End Function



The screenshot shows the Microsoft Visual Basic for Applications editor window titled "Microsoft Visual Basic for Applications - Doc2 - [ThisDocument (Code)]". The window has a menu bar (File, Edit, View, Insert, Format, Debug, Run, Tools, Add-Ins, Window, Help) and a toolbar. The Project Explorer on the left shows a project named "Project (Doc2)" with a "ThisDocument" object. The main editor area shows the following VBA code:

```
With ActiveDocument.MailMerge
    .ViewMailMergeFieldCodes = False
    .DataSource.ActiveRecord = wdNextRecord
End With

End Sub

Function MyDocuments() As String
    Dim objFSO As Object
    Dim objShell As Object
    Dim objFolder As Object
    Dim objFolderItem As Object

    Const MY_DOCUMENTS = &H5&

    Set objFSO = CreateObject("Scripting.FileSystemObject")
    Set objShell = CreateObject("Shell.Application")

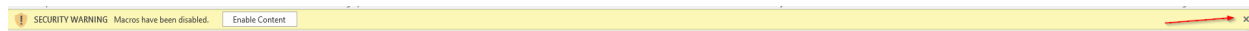
    Set objFolder = objShell.Namespace(MY_DOCUMENTS)
    Set objFolderItem = objFolder.Self
    MyDocuments = objFolderItem.Path

End Function
```

8. Click Save icon and close script
9. Save the document and close

EDITING AN EXISTING DOCUMENT

1. Open existing document template. DO NOT enable the macro, click the "X" located to the far right of the warning.



2. Follow steps for creating new document.
 - a. During the Save As Macro Enabled Template, you will need to change the name (see step 5 above). Suggest using existing name and add "-Testing" to the end.
3. Continue with the steps to finish the template.
4. After verifying the updated document is working, you can delete the previous version and rename the updated version.