

STATEWIDE OFFICE OPERATIONS NETWORK

Thursday, December 14th 2023

Hosting Agency: Microsoft Teams

In Attendance: Emily Peterson, Baker County; Erin Drews, Clackamas County; Lori Agalzoff, Clatsop County; Jenny Mahlum, Coos County; Linda Neasham, Crook County; Elisa Turk, Deschutes County; Robbi Murray, Harney County; Bobby Lenhardt, Jackson County; Marcy Bliss, Jackson County; Adam Hausen, Josephine County; Pam Mathes, Klamath County; Susana Moaliitele, Lane County; Carolyn Knox, Lincoln County; Kim Botello-Tiatenchi, Marion County; Peggy Lowery, Marion County; Trish Hand, Marion County; Christy Elven, Multnomah County; Rachel Polelle, Multnomah County; Sam Hittle, Polk County; Aubrey Capps, Tillamook County; Sahara Hendricks, Tillamook County; Rachel Willingham, Umatilla County; Heather Lucas, Washington County; Brenda Hopper, Yamhill County; Ruby McClorey, Compact; Judy Bell, DOC; Michelle Mooney, DOC; Mark Patterson, DOC; Melissa Strom, OISC

Minutes Review: No edit recommendations.

- **Decision Log Items: None**

DOC – Mark Patterson

- **SB 581 / OAR 291-209 – New EDIS Rules**
- New requirement: Notification
 - The supervising officer shall notify the AOS of their eligibility for earned discharge, and then at least quarterly, shall track and document their progress towards achieving earned discharge and share that document with the AOS.
- **OACCD Adopted Key Words:**
 - **EDIS Initial:** Initial notification of EDIS program and potential eligibility
 - **EDIS Quarterly:** Quarterly reviews documenting progress towards achieving EDIS and that the information was shared with AOS.
 - **EDIS Review:** Initial eligibility review at halfway point.
- **Question from the group:** What if the AOS has something that that disqualifies them EDIS permanently?
 - **Answer:** Enter a chrono detailing why the AOS is permanently disqualified, and then all future reviews can cease if no other cases are eligible for EDIS.
- **Question from the group:** For quarterly reviews, what if the AOS has multiple crimes with multiple conviction dates?
 - **Answer:** The quarterly review does not have to be exact. Pick a date during the quarter and work off that. As long as it is being done quarterly as a whole, that will satisfy the intent of the rule.

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- **Treatment:**
 - New EDIS language added “must complete a Specialty Court Program” and any follow-on requirements set by the court.
 - A “set duration” treatment is a specified length of time and there is a certificate of completion provided upon completion.
 - An “ongoing” program is something that is continued and there are no specified completion criteria. i.e. Mental Health counseling.
 - The Supervising Officer should strive to connect the AOS with culturally specific treatment programs.
- Burglary I if sentenced under ORS 137.635 is not eligible for EDIS. This will show an enhancement. If the sentence is Board PPS, this enhancement would most likely have been ordered. If the conviction is probation or Local Control, it might not have the enhancement. You will need to determine eligibility manually.
- Attempts for Sex Crimes: Attempt Rape I & II, Sodomy I & II, Unlawful Sexual Penetration I & II, Sex Abuse I.
 - Restricted from EDIS eligibility if sentenced to Board or Local Control PPS
 - Eligible if sentenced to probation.
- **Training Materials provided:**
 - Flowchart for determining eligibility based on date of conviction and compliance standards
 - Worksheet to assist PO during review process and can be used as a document to provide to AOS on their progress.
 - Notification Pamphlet
 - Progress Report Form Template (Coming Soon)
 - Link new EDIS rule coming 01/01/2024
 - Upcoming trainings at OACCD sub-groups
 - FAQ website for up-to-date questions and answers regarding EDIS
- Mark is available to come to your county to provide EDIS training.
- All training materials are templates, and you can create your own. If you create your own forms for anything, please send to Mark Patterson so he can send them out to other counties to see if they want to use it as well.
- There is an EDIS Review Report by County and Caseload Word document provided to Directors to provide to PO’s.
- There is a Past EDIS Review Date spreadsheet that gets sent to Directors that list all AOS’ that are past their 50% review date. PO’s can use this to complete reviews as required.
- EDIS tracking pilot with Linn & Douglas County
 - Documenting why AOS are not meeting EDIS criteria to show to legislators why they are not being approved for EDIS.

- EDIS Dashboard:
 - Shows Approved, Denied, and Not Yet Reviewed sorted by:
 - Month
 - Race
 - Supervision Level
 - Denials by Reason
- **From Judy Bell:** The way the reports provided to Directors calculates the date is different than CIS calculates. The date on the reports may be a few days off. The report currently does not take INOP into account. They are working on updating the report and INOP should be accounted for starting with the January report run. Programming will be modified to account for INOP sometime in the future.
 - If something is not working the way we are expecting it to, notify Judy Bell **immediately!** Do not hesitate with any programming questions.
 - The report is programmed to capture commutations.
 - **Question from the group:** We are supposed to track restitution on the longest running PPS case, even if it is a different case that the restitution was ordered on. How will this effect EDIS?
 - **Answer from Mark:** This has been brought up in the past. It depends on the payment history. If the client is current on payments, they are considered compliant and it will not restrict EDIS eligibility on cases. As long as they are compliant with restitution payments, all cases become eligible. If they are not compliant with restitution, they are not eligible for EDIS for all cases at that time.
 - **Restitution in general is not case specific.** If restitution has been ordered at any point in time on current cycle, that is what needs to be reviewed.
 - Reminder that reports only reflect the crime is eligible for EDIS review. We must manually review each individual conviction to determine true EDIS eligibility.
 - Outgoing Compacts are now Eligible for EDIS.
 - Unsupervised could be eligible as well and will be reflected on reports.

OISC – Melissa Strom

- **Nothing from OISC.**
- **Question from the group after Melissa left meeting:** Does OISC look at the date on the closing summary? If closed from supervision earlier than expiration date for whatever reason, that early date is not reflected on the form anywhere unless typed in.

Compact – Ruby McClory

- **Question from the group:** For Compacts in investigation status, how long do we keep the files if closed to CREJ?
 - Since it's an investigation file and not a supervised file, check with County Counsel for their opinion. Office could review the OAR for interpretation as well.
 - Many Counties indicated they keep the investigation paperwork for one year after rejection.

Parole Board – Susi Hodgkin

- **Reminder:** Use the forms that were sent out by Dylan Arthur. You can utilize the website to complete the forms and send them electronically.
- Greta's term ends in February and they are down one board member. Currently recruiting for two board members.
- Otherwise fully staffed.
- Might be having core desks attend SOON (warrants, sanctions, and orders).
 - **Question from the group:** What is the Discharge Request Mergeable Form?
 - Susi will confirm and send out information on how to use this form.
- **From Judy Bell:** DOJ opinion changed on the revocations of commuted sentenced. There will be no PPS credits given to any individual when their commuted sentence is revoked.
 - Reminder: do not use Time Served credits for anything other than Local Control. Do not use on board PPS.
- There is a system glitch that is providing old PPS conditions on new orders. Double check when they come through, but the board is working on the fix.
 - Susi will send an email to SOON and FAUG explaining in further detail.
- **Question from the group:** At October Parole Board training, they asked that certain documents be sent to the board at closure. (Sex Offender Evaluations, Polygraphs, Police Reports, etc.). Can we clarify? It was asked for documents to be sent to Tara.
 - **Susi will need to confirm and it could be related to SONL and leveling.**
 - **Question for the group from Judy:** Would it be more convenient for the group to send those to the board immediately when they're received, rather than at closure? Is that easier for the group/board?
 - **Group Consensus:** At closure.
 - **From Judy Bell:** Check with Directors and/or county counsel on if we can redistribute documents that are not ours (police reports, treatment, polygraphs, etc.). Could be that we might provide name and contact information of treatment or polygraph examiners, rather than the actual document. That way the Board knows where they can go to get the document if they need it.

- Susi will clarify with DOJ on this since we are all LE partners for supervision.

DOC – Judy Bell

- Supervision Leadership Network: Scheduled their meetings and a few conflicted with SOON. April and October SOON would be one week earlier. They changed it, and there is no longer a conflict. Do we want to change those SOON meetings back to the regular scheduled? Effects Tillamook and Lane County, as they are hosting.
 - Tillamook is ok to change for April
 - Lane will check their scheduling and get back to us.
 - Tentatively will change back to regular schedule, but October depends on Lane. POST NOTE: Lane did approve change.
- Good news: QPR mask in LEDS is not going away. QPR will remain in place.
- Last SOON, discussed potential for a new SR for a “sentencing authority field”, so people could keep the sentencing Judge with the sentencing Judge.
 - FAUG said they did not need that at all.
 - Agreement is that an SR will not be requested and users should only use the Sentencing Judge field for the original sentencing Judge. If your county wants PV’s heard before other Judges, do not change the “Sentencing Judge: field to a new Judge.
 - The Sentencing Judge field needs to remain who handed down the conviction, not who will hear the PV or is currently the authority (PB or LC).
 - **Question from the group:** What do we put for compacts that we cannot locate the Judge name?
 - **Answer:** Per the OPS Manual, we do not enter the Judge name on compact cases, we enter “compact” on that line.
 - **Question from the group:** What do we do for Bench converted to formal for the original convicting Judge?
 - **Answer from the group:** Use the Judge’s name that converted bench to supervised probation.
- Recently added Ethnicity SR. Do we want programming to insert a U for all existing records? Or would we rather have to enter it manually?
 - **Group consensus:** Do not auto update to U. Enter it manually.
- **Additional Question:** If H has been entered in the race field previously, can we request that it be auto filled into the Ethnicity field?
 - **Group consensus:** Yes, request to have SR submitted.
 - Updating the Race field to “W” or leave as “H” would be a CBC decision.
 - Judy will bring this to FAUG for review.
- Judy will schedule another support staff academy 6-week course!
 - Big picture will be limited to 20 people.
 - The other 5 weeks will not be capped for attendance.

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- **Reminder:** Use the proceeding date as the begin date for probation or LC (as long as they have started their LC sentence).
 - It is rare, but sometimes courts may convict on the proceeding date, and then delay sentencing for a future date. That is the only time you will have a different begin date than the proceeding date.
 - The majority of the time, the sentence is ordered on the proceeding date.
 - The Judge may sign the order later, but the proceeding date still begins the supervision.
- In the last SOON meeting, we discussed that monikers do not need quotations. When entering a moniker, do not use quotation marks.
- Alpha Character in the ORS SR: still in progress.
 - The programming is also expanding the description, so when listed in CIS when using the F4 function, instead of one line per crime, it is now two. The group was upset about this idea. Judy will request that this does not happen and we keep ORS table entries to one line if possible.
- SR Submitted for restitution module in OMS.
- SR Submitted for the affect custody cycle merge/split has on OMS case management documents. Cycle splits or merges will cause the OMS case management documents to appear in the wrong cycle, making them unable to edit. Can submit a ticket to move the document to the correct cycle.
- SR for INOP to be recognized in calculating eligibility to be added to EDIS programming.
- **Question from the group:** Do we have any update on the LEDS wish list?
 - **No update per Judy.** Will bring wish list to the next SOON meeting and review.

DOC – Michelle Mooney

- **Reminder:** ORS Change for the new language in the General Conditions of Probation. For any questions, reach out to her.
- **SR for STTL reports into OMS.** Currently in the testing phase.
 - Part of this SR was documents appeared to be removed after a period of time. Those documents were not going away, they were just being “hidden”. This is being updated to a folder for Current Documents and a folder for Archived/Historical.
- SR submitted for a new chrono code OV for Office Visit.
- PSC override removal. FAUG users will have ability to remove incidental overrides.
 - PSC overrides will not be able to be deleted after January 1st 2024

- New Chrono Codes will be put into the system once the training is conducted. The training is tentatively scheduled for the beginning of February 2024 will cover:
 - Chrono usage.
 - How the measurable contacts are going to be used and how they tie into chrono entry.
 - Four statewide virtual trainings.
- Rules for contact standards will likely be in place by May 1, 2024.
- **Question from the group:** Can we copy and paste anything into CIS?
 - **Answer:** No, please do not copy and paste into CIS from anywhere.

OPS Related Issues:

- **LEDS 2020**
 - QPR mask is remaining and will not be deleted.
 - Wish list will be emailed out prior to the next SOON meeting so we can review ahead of time.
 - **Question from the group:** When the SSN listed in the CCH is verified incorrect, do we have to or should we notify OSP?
 - **Answer:** It would be nice to notify OSP, but not mandatory.
 - **Question from the group:** In LEDS 2020, when PO's are going on leave, how are other counties using the group mailboxes? Currently every team has a shared inbox, but what happens when it's an unexpected absence?
 - **Answer from Trish:** As a TAC, you can go in and change that, unless they don't have the Forward option turned on. Marion County requires the PO's to have it turned on at all times, so they can go in and change things as needed.
- **OPS Manual**
 - Met Virtually before October 2023 SOON Meeting
 - Will meet again before February 2024 SOON Meeting
 - Welcomed Bev Mills to the group!
- **Local Control**
 - **Question for the group:** Do we extend the ASR date due to INOP from abscond?
 - **Answer:** Yes, Local Control mirrors that board practice, therefore you need to change the ASR date one for one for INOP time.
 - **For LC PPS Revoke, are we recalculating the ASR Date as well?**
 - **Answer from Judy:** Judy will look into the rules and discuss the board process. Will email the group the answer. POST NOTE: When PPS is revoked, to recalculate the ASR date, time starts over as of the re-release date; meaning if the ASR was originally 12 months after begin date, it would now be 12 months after re-

release date. If the max date is less than 12 months away, then the new ASR date would be the max date and there would be no opportunity to move to UNSU.

- **Other OPS Related Issues**
 - F8 Notes only pertain to the offenses we are supervising, and things that impact the offense (PV Hearings, early terms, benches, etc.). When entering an F8 note, include the case number you are referring to.
 - For those pending resentencing, it is encouraged they are checked at least twice a month for resentencing orders.
 - Commutation Orders: The board is of the legal belief there is no PPS credits given for those whose commuted sentences were revoked.

- **Email decisions**
 - None

User Groups:

- **SUN**
 - Brenda Hopper is the newest SUN member!
 - If you want to become a SUN member, email Judy for requirements.

- **FAUG**
 - **Next meeting is in February**
 - Working on PO manual.

- **FSN**
 - Will meet virtually January 25th 2024
 - After January, all meetings will be in person.

- **OACCD**
 - Judy presented an update with the TSI issue.
 - Once all 36 counties agree, will implement that new process.
 - Judy: On the recommended EDIS Key Words, they have to be entered exactly as provided. No abbreviations and you have to use the key word. That is not optional.
 - Michelle: approved FAUG recommendation of EDIS Key Words.

Round Table:

Lori Clatsop: They have a group email box where they receive documents from their court. Do those documents need to be sent if the AOS is supervised by another county?

- **Answer:** Yes, any document received by the convicting county needs to be sent to the supervising county. Judy encourages that those documents be sent to the SOON rep to ensure any data entry is captured. If sent directly to the PO, it may not make it to support staff to enter.

Sahara Tillamook: Old parole absconder from the death verification list. When searching his name, SSN, DOB, everything she can find states he is deceased. O has so many alias's and DOB's, SID all over the US, etc. Vital Records request was submitted multiple times and nothing is coming back. They believe he died out of state.

- To verify a death, we can use a funeral home published obituary, death certificate, police report, Medical Examiner report, and hospital death verification.
- Judy will look to see if OISC will accept if the DMV or CCH is reporting the death. POST NOTE: DMV standards for proof of death are more stringent than our own; therefore, we can use the DMV LEDS record indication of death as our proof. OSP CCH allows proof of death that community corrections does not deem acceptable; therefore, we should NOT use the CCH indication of death.

Judy Bell: Reminder for what is learned about data entry practices or changes, please take back to support staff at your agency!

Meeting Adjourned. Thank you everyone!

Next Meeting:
February 8th 2024 – Virtual

SOON Officers:

SOON Chair: Cassy Polen, Yamhill

SOON Co-Chair/Minutes: Erin Drews, Clackamas

OPS Manual Chair: Cassy Polen, Yamhill

General Information Pages: Erin Drews, Clackamas

CC Directory/SOON Rep List: Pam Mathes, Klamath

The mission of the Statewide Office Operations Network (SOON) is to:

- Promote uniformity, standardization and data integrity in community corrections field office operations and automated offender tracking;
- Define on-going support training needs;
- Recommend community corrections field office policy and procedure changes; and
- Address other corrections-related support issues.
- SOON accomplishes this mission by increasing knowledge and awareness of the most up-to-date methods, sharing resource information and expertise, and promoting statewide support staff participation.