STATEWIDE OFFICE OPERATIONS NETWORK
Thursday, December 11, 2014

Hosting Agency: Yamhill County Community Corrections
Meeting Location: 615 East 6th Street, McMinnville, OR 97128

In attendance: Jessica Jauken, Wasco County; Donna Hemman, Polk County; Mark Patterson, Compact; Cathy Snider, OISC; Dianne Erickson, OISC; Susie Schindler, Marion County; Fabian Hernandez, Marion County; Bertha Logsdon, Hood River County; Kerri Humbert, Douglas County; Patty Gaskins, Douglas County; Christy Elven, Washington County; Robin Filbeck, Tillamook County; Rhonda Wright, Tillamook County; Terri Chandler, Jefferson County; Mary Hunt, DOC; Lee Cummins, DOC; Vicki Wood, Yamhill County; Brenda Hopper, Yamhill County; Amanda Mueller, Yamhill County; Bobby Lenhardt, Jackson County; Diane Ballard, Jackson County; Nicole Pauly, Multnomah County; Lisa Gilbertson, Multnomah County; Angie Gustafson, Linn County; Mindie Everett, Multnomah County; Ashley Harmon, Multnomah County; Kari Garcia, Multnomah County; Judy Bell, Benton County; Emma Bouchet, Multnomah County; Marla Wiese, Multnomah County; Jeannie Olson-Shelby, Lane County.

Welcome & Introductions: Director Smietana welcomed the group to Yamhill County.

Review Minutes: No corrections or changes.

OISC: It was asked if we should be sending FMP probation information to OISC upon case closure. Yes we should, and there has been an addition made to the OISC chapter in the manual which outlines all of the documents they want sent at closing.

When we change a block number to a SID number, we should be doing a screen print and emailing it to OISC at that time. Please don't wait until file closure to send this information.

Judy asked about a situation where an offender has his misdemeanor probation revoked and terminated the same day he gets a new prison sentence. Should we close the cycle and have the institution start a new one? Dianne wasn't sure and said she would get back to us.
POST NOTE: The official answer from OISC is that if the offender enters the prison on a day different than the date of sentencing (even as little as one day later), it's a new cycle. If the offender enters prison on the same day as the conviction, it's the same cycle.

Donna asked if we should be sending treatment records to OISC, and if doing so is a violation of HIPAA. Judy thinks we should not be sending them because they are the property of the treatment provider. We should tell our offenders how important it is for them to keep their own treatment records in case they need to provide proof later on.

Cathy brought up an issue she has when sealing records: she can't delete F8 notes. Mary said that an F8 note can only be deleted by the person who entered it; if the person is no longer working there, a ticket can be sent to development.

Cathy asks that we send sealing orders in a timely manner so she can include them with her paperwork at the time she does the sealing.

Some counties have been cleaning out really old files, and have found files for offenders that are now being supervised in other counties. The consensus is that if the file is from a previous cycle, the county that is currently supervising does not want it. Do not send it.

Compact: Judy brought up an issue where a previous offender had his record expunged, but he had been compacted to WA during his supervision and his WA records did not get sealed. We talked about establishing a process to deal with this type of issue going forward, and we decided that we should check for a compact history on anyone with a sealing order. If the person has a compact history, forward a copy of the order to Mark Patterson (email it to the Interstate Compact email address). He will seal the record in ICOTS, and he will forward the order to the supervising state. Dianne will add this to the manual.

Mark said that the compact office had its national audit in November and they passed. He advised that Manette is going to do a 6-month job rotation as a compact coordinator, beginning on 12-29-14.Nicole Nash from Religious Services will be filling in for Manette during that time.

Emma asked for data entry advice on an incoming compact case. O was on probation in the other state and it was revoked; O is now on PPS and is compacting now. Emma wanted to know if she should enter both the probation and PPS lines in CIS, or just the PPS line. Mary said to just enter the PPS line since that was his status at the time his supervision in Oregon began.
Correction: Mary checked with Mark Patterson and confirmed that incoming compact cases are NOT entered as Post Prison in CIS. The case in the above scenario would be entered as a Compact Parole 'I' line.

Parole Board: Shawna was unable to attend, but she sent the following email to Lee:

> STTL reminder: Legislation changed the parameters for the STTL qualifications which has resulted in more inmates having that option but this new legislation and the STTL program itself is a DOC item. The Board did not and does not have anything to do with the criteria of STTL, the legislation that passed to allow more inmates this option or anything related to the failure of the program (i.e. sanctions, warrants while on STTL). The only thing the Board has done and will continue to do is work collaboratively with DOC regarding this program. As mentioned at previous meetings, the Board met with DOC to discuss how to streamline the process and has agreed to vote the release plan earlier than previous practice so that while the inmate is out in the community the STTL conditions are the same as what the PPS/Parole conditions will be upon completion of the program. I bring this up only because there seems to still be a lot of misunderstanding in that the STTL program is a Board item and the Board made this change. We did not.
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> If they are successful on STTL, the PO needs to have the Order of Supervision signed by the offender and email that document to our office for our records to Orders.BOPPPS@doc.state.or.us<mailto:Orders.BOPPPS@doc.state.or.us>
> Only forward the original signed PPS orders to the Board; we do not need signed copies of updated orders father down the line.
>
> Previous SOON item: When to send release plan or just sentencing document?

If the offender is a Board-controlled offender and receives a new local sentence, only the sentencing order and the release date need to come to the Board. If the Board-controlled offender has a probation case revoked but did not receive a DOC sentence and the Board cases have not stopped, only the sentencing order and the release date need to come to the Board. If the Board-controlled offender has a probation case revoked and received a DOC sentence, the Board needs a release plan. If the Board-controlled offender has the Board cases revoked, the Board needs a release plan.
So the short & skinny version…..if the offender has Board cases that were stopped due to revocation or the offender receives a new DOC sentence, the Board will need a release plan for those. If the offender's Board cases do not stop and the new sentence is not a DOC sentence, the Board only needs the sentencing document and the release date.

Also please note…if there was a revocation imposed by the Board, once the revocation documentation is received by your offices, you can compile the release plan and send it early. We need the plans submitted prior to the offender releasing from the revocation. So as soon as you are able to compile it, send it.

New Receptionist: We hired our new receptionist. His name is Del Grady, his first day was Monday, December 8th. Alysha Gonzales who has been covering that desk over the last few months is currently training him. Her last day with us is December 29th. Kathleen Wilson is back from maternity leave so her hours are Monday – Friday 8:30 – 12:30p; Adam Alexander's hours are Monday – Friday 1p – 5pm. A new updated staff roster will be sent out to the SOON & FAUG distribution lists.

Shawna went over the emailed items with us by phone, and she added one more item: The Board does not automatically close interest in an offender if their Board cases expire and they are still on supervision for a local control case. The Board would appreciate it if the counties would petition the Board to close their interest in these cases whenever it is appropriate to do so.

OPS Related Issues: We had previously talked about the possibility of asking LEDS to change the PVP code so that an EPR that has the RTP set to PVP would not be able to expire. The request did not get forwarded to LEDS. We discussed it and decided that we would not ask for this change. When we change the RTP code to PVP, we can just extend the expiration date out by, for example, 90 days or 6 months (we will leave the length of time as a county-by-county decision).

Reminder: Crystal Reports are now password protected, and the password is the same one that LEDS uses. If anyone doesn't know it, ask your LEDS rep.

OPS Manual: We discussed an issue that some counties are having with STTL offenders. If the offender has both "I" lines and "L" lines and the county closes the "L" line when the sentence actually expires, the PPS for the "L" sentence isn't showing up on the PPS orders. Apparently, if the line is already closed, the release counselors don't realize that the sentence needs to be submitted to the Parole Board for inclusion on the PPS orders. Some counties wait to close their "L" lines until the offender releases from prison, and those counties have not had this problem. The counties that have been closing the "L" lines as they expire feel very strongly that this is the correct way to do it, and that the release counselors should be trained on what to look for. Judy said that she will take this issue to the LSA workgroup and

get direction on the procedure they want us to use. For now, everybody can just keep doing this the way they have been.
NOTE: Mary will talk to Hank Harris, DOC Release Services Manager, and Jeremiah Stromberg, Assistant Director of Community Corrections, to see if there is an official opinion on this issue. She will report back to the group at the next meeting.

Local Control: An LSA workgroup has been formed to revamp the LSA manual.

Judy brought up an issue that has come up when an LC case has a concurrent DOC sentence – many times the movement from LC to the institution is missing. Mary says the movement should be happening, but she will look into it and submit a ticket to get it fixed if needed.

Note: Mary determined that there was in fact an issue and sent this email out on 1/12/15:

A program fix was moved to production this morning, **Monday, January 12, 2015**, to correct the following problem:

Incident Request 63341 – County Movement records are not always being closed out when Local Control offender is admitted to Institution. Fixed bug- when multiple movement records were involved process was only deleting the first one. Also added bypass of Sanction records when request is to close all movements.

The following program was modified and promoted to production: **OPS634B *PGM Close Records in Movement File OPLOCL**. For those of you who attended the December SOON Meeting, you may recall Judy Bell's discussion regarding this issue. She discovered the missing data while reviewing her Quarterly Local Control Reports. NOTE: Nicole Nash sent the most recent batch of reports to DL SOON on January 5, 2015.

The problem Judy found was with the "SB1145 Data in CIS" report – this is the 'SOON 02Jan15.rtf' attachment to the January e-mail. It is also the first report mentioned in the body of the e-mail, called SB1145 (SOON) Data in CIS, and has always been tagged as "information only". If you haven't already done so, you'll need to print this report for your location. **PLEASE DO NOT PRINT THE ENTIRE REPORT!!** This report is at least 250 pages, so be sure to **only print the page(s) for your location**. Or be sure your printer has plenty of paper.

While reviewing her October, 2014 "SB1145 Data in CIS" report, Judy found that the 'Stop Date/Time' was missing on several of their LC offenders. After checking the Movement History in CIS, she found that the program had not auto closed the SB1145 lines when those offenders were admitted to DOC. Judy turned in a ticket to Development and they were able to fix the program. From this date forward the program will now auto close the SB1145 county inmate movement on all admission to IN status from LC status. However, the program fix does not address the issue of all the old LC to IN movements. The missing Stop Date/Time data will need to be manually entered by someone in your office.

SPECIAL NOTE: When fixing your data, please remember the Stop Date/Time on the SB1145 county inmate movement line, must be exactly the same as the Start Date/Time of the admission to DOC/IN status. If you have any questions about this item, please let me know. Once you've fixed the county inmate movements on the January report, you'll need to be sure and check future reports for missing Stop Date/Time data. This will need to be done until you

no longer have offenders with missing data. That will likely be until all the new reports only have LC to IN offenders with a Stop Date that is on or after 1/12/2015. I'm sorry to say your "information only" report has now become another "clean-up" report. I'll ask Nicole to make that change in the body of the e-mail before the next quarterly reports go out. If you don't have the staff to do all the fixes yourself, please let me know and I'll ask Char McCarthy if she can help. As for the previous quarterly reports, before I ask you to do a lot of clean-up on the old data, I'm copying Denise Sitler and asking that she check with Research to see what impact the missing data has on their statistics, or if it affects funding.

The good news is that the program works perfectly when an offender moves from LC to PO status or when he/she moves between your 'L' location and the county location, i.e. LBEN/JAIL to BENT/STND and back to LBEN/JAIL. As far as we could determine, it was only the LC to IN cases that had a problem and that has now been fixed.

Judy will monitor her offenders who go from LC to IN status for the next couple of weeks, just to make sure everything is working properly. It would be helpful if you could do the same for your LC offenders and let me know if you see any problems.
NOTE: None of the above applies to an LC to IN movement if you had CCSUN insert the LC movement prior to the IN admission. In those cases, CCSUN also inserts the entire SB1145 county inmate movement line – start and stop date/time – so those cases should be good.

Donna brought up a case where an offender was revoked on 12/4 and didn't show up in her jail until 12/9. He had been compacted out, so he was extradited and went to Coffee Creek for 2-3 weeks, and was revoked while in custody there. She wanted to know the correct way to enter the data. Mary said that she should admit him back to their location on the date he enters the county jail, but do the PPSVSANC line according to the dates on the Board order. The dates will not match up.

Mary talked about an email she had received from Vicky in Curry County. Vicky said that she has an offender who was on felony probation, and all of his sentence information was entered. Then the probation was revoked, and the grid scores (crime seriousness & criminal history) disappeared. Mary wanted to know if this has happened in any other cases. Someone suggested that maybe she was using option 7 to add a sentence instead of option 17 to add LC? No one else has noticed this issue.

Other OPS Related Issues: We talked about the procedures for direct transfers on new cases. If an offender is serving jail time for less than 90 days, it is okay to either get reporting instructions based on a projected release date or just mail the file to the county the offender lives in and give the offender instructions to report to the other county upon release. If the offender will be in jail for 90 days or more, the sentencing county needs to wait until the offender is released to get reporting instructions and mail the file. Most counties are in the practice of waiting until all offenders are released from jail to do intake and get reporting instructions, but Judy wanted everyone to know what the rules are in case someone receives a file for an offender who is still in custody.

Susie from Marion County brought up an issue their county has been having with direct transfers whose address is the mission. Susie said that these cases have to be staffed with their director to determine if they will accept them or not. Generally, if the offender has been established there for a while, the case will be accepted; if the offender is just coming to the mission so they can transfer to Marion County, they will send the case back. We discussed whether any other counties accept temporary residences for

direct transfers; some will and some won't. For example, Benton County will accept "long-term" temporary residences, but not "short-term" ones (like homeless shelters).

Christy brought up a case where she was closing a file. The offender was ordered to pay $5000 in restitution and he only paid $114. His insurance ended up covering the victim's costs; the restitution had just been ordered in case the insurance wouldn't pay it. The Court says that they will not be attempting to collect the balance of the restitution because the victim has been compensated. Even so, Judy says she should not change the restitution amount in the doc 400 unless she gets an order from the Court.

Email Decisions: Mary is going to get some long descriptions changed for us: we would like the wording for RTNS to be clearer, and we would like the descriptions for REVP and INAC to reflect that we don't need a sentencing order to use those outcounts.

We can no longer use the Social Security Index to look up deaths that have occurred in the last 3 years; there are privacy laws that shield the information. Jessica volunteered to send out a form they are using in Wasco County to request death information from the Center for Health Statistics (the form will be sent out with the minutes).

Mary mentioned that anyone can be added to the SOON DL email list, even if they aren't SOON reps. They would just need to email Mary and request to be added.

DOC- Mary:
We went through a demo on the upcoming edits to condition tracking. The edits will prevent trackable outcome measure conditions from having an amount/unit of 0.

If you enter an outcome measure condition and the amount has not yet been determined, change the trackable field to "N". Once the amount is ordered, change the trackable field back to "Y" and enter the amount. Once you change it back to trackable "Y", you must enter an amount or it will change back to "N".

When you close a case, it will give you an error message if you have any trackable "Y" conditions that do not have an amount entered. At that point, you will either need to change the trackable field to "N", enter an amount, or delete the condition.

We will no longer be able to enter a "payment" amount that would result in a negative balance, or to enter a payment if no ordered amount has been entered. Also, the POs will no longer be able to change conditions to trackable or non-trackable from their screen.

We discussed the wording on the payment screen, because we do not like where it says "payment this month." It is not an accurate descriptions of all entries made on that screen. We decided that we would like it changed to "amt/unit applied".

The restitution committee suggested that we add another field on the condition screen. The field would be "TBD", and we could mark it "Y" or "N"; it would be for use when a restitution amount has not yet been determined and we have changed the trackable field to "N". Affected reports will be updated after that field is added.

Lee:
Reminder to everyone that Char McCarthy is available for training; contact Lee to schedule a time.

FAUG will be going over the conditions table at their next meeting. They will determine if any conditions need to be added or discontinued, and they will be adding long descriptions to each condition. Lee will cc the SOON DL when the list is emailed out for consideration. Judy suggested that they could add a specific "NOMJ" condition.

There is some money in the Governor's budget to look into creating a new system to replace CIS. Lee will update us as any developments are made.

Regarding offenders who return from abscond after being gone for 6 months or more: Back when we used OCMS for risk scoring, a new risk assessment was always required in these instances. With the PSC, we should only have to do a new one if the risk level has changed. However, there is a glitch in the system that makes the risk level field blank. They are working on getting it fixed, but for now we should just create a new PSC score whenever the field is blank.

Regarding the "decision date" field on the sanction screen; this field is only for use with probation and local control cases. It does not need to be entered for Board cases.

User Groups:

SUN: Mary is working on updating the SUN manual. She also has a meeting with IT next week regarding SUN requests; we are trying to get off the PCM system and have them create a separate request system for us.

FAUG: When they met in November, they approved requests for improvements to release plans. They meet next in Yamhill County on Feb 18 & 19.

SOSN: No updates.

FSN: They meet next in Benton County in February, and will be deciding on new officers. IT is currently working on 5 or 6 FSN service requests.

OACCD: They met in Eugene in November, and will meet next on January 14 & 15 in Marion County.

Round Table: Christy asked if the new fields for dispositional and durational departures are going into production soon. Mary said that they are working on it.

Next meeting: February 12 in Lane County