

FEE SYSTEM NETWORK MINUTES

October 27, 2011

Hosted by Linn County

Present: Judy Bell, Benton; Janet Leep, Coos; Crickett Hanna, Jackson; Angie Brown, Josephine; Abby Natvig, Linn; Heidi Grieser and Doug Cox, Marion; Tammy Sundin, Umatilla; Vicki Wood and Shannon Miller, Yamhill; Christy Elven, Washington; Tonya Owens, Tillamook; Lee Cummins and Mary Hunt, DOC; Nikki Bennett and Steve Bouchard, DOR.

Introductions/Welcome

Donovan Dumire supervisor at Linn Co welcomed the group in place of Ric Bergey the director at Linn Co. Donovan talked about how when he was a PO he knew it was important to collect supervision fees but he didn't have a true understanding of the big picture and importance of the fees until he was promoted to supervisor and he now sees how the fees collected help during these times when we are facing budget cuts. Donovan expressed his appreciation of all of the hard work the fee group does in their efforts to collect fees for their offices.

Review Additions/Corrections to April and July minutes:

Corrections: Correct the spelling of Lee Cummins last name on both April and July's minutes, spelled "Cummings" on the minutes and it should be "Cummins".

DOC Updates:

PSC – Public Safety Checklist – will automatically check the person's criminal risk factors and tell you the risk for future crime. The score on the PSC will likely be higher than the score on the OCMS. The PSC will not capture out of state offenses. If you don't get a score in the PSC there may not be enough data on the offender. For offenders with extensive out of state history, PO's can use the Proxy score. The new PSC will reduce the necessity for overrides and will require a reason when one is done.

LSCMI is being updated and will also include a case plan. FAUG reps will be the trainers for each office on how to use the new LSCMI.

Changes to Option 23/24 have been placed on hold due to it not working properly for all counties.

INPR – ended on July 1, 2011. If an offender was convicted prior to that date they will still be eligible to be placed on INPR. Any convictions after July 1, 2011 are NOT eligible for INPR.

Discontinued Fee report – It was found that the report was including NSF amounts as a credit when the account balance is at \$0. The report has now been fixed to not include the NSF amounts as a credit.

Dave Wells- Dave has decided to retire. His retirement party is on November 30 at CDC in Salem.

Service Requests:

- 2472 – Request to modify the Caseload Collection Statistics report to include a ‘Detail’ option. The ‘Detail’ will be a list of the offenders that contributed to the amounts collected. With Dave Wells’ retirement, Helen Kennedy is taking over work on the programming and will let us know when it is ready to test.
- 2469- electronic transfer to DOR – to be worked on after 01/02/12 along with service request #2470
- 2470- electronic adjustment memo transfer to DOR
- 2517- allow zero fee amount will be worked on after service requests 2514 and 2515
- 2514- add effective date to bad address field and to the bad address report
- 2515- add override end date to county override report

New Service Requests:

- Remove option 8 from the fee menu, per request from Janet Leep. Option 8 and Option 7 work the same. Option 7 Reconciliation Screen has the option to be printed. Option 8 Reconciliation Report prints automatically when you select it. A poll of the group was taken and everyone in attendance stated they do not use option 8 so they were all fine with the option being removed.
- Print statements for out counts – It was requested that some changes to Option 5 Fee Billing Statement be made to include the option to print statements for out counts. An example was presented to the group and the group agreed that it would be beneficial to have that option added to Option 5.

New programming

There is some new programming in place that runs nightly to make sure the Movement History and fee account locations for an offender match. Keep an eye on offenders that have their location backed out or changed on the Movement History to see if the system corrects the location on the open fee accounts by the next day. If you find an offender that has fee account locations that do not match, you may still have to make an adjustment to get the locations to line up. If that doesn't work, contact the Help Desk and ask for a ticket to the Development iSeries Team.

New fee system software

A re-write of the fee system is being considered that would move the fee system to a new platform. ITS said we may be able to purchase an accounting program that will work with DOC400 data. Mary will enter a service request on behalf of FSN for further analysis of a new fee system.

DOR – Nikki Bennett

If you ever misplace your monthly reports email Nikki and she can put them back in your DOR file manager online.

Nikki handed out a report that shows a comparison of the beginning inventory (7/1/10) and end inventory (6/30/11). After the group looked over the report it was asked if we could get a report that compares prior year's data and Nikki said she would work on it and send it out to the group.

The question was asked if there was a way for offices to take payments for DOR and then DOR can bill the office for that amount. Nikki said she will check into it and see if there is a way for their office to do that.

Nikki asked if DOR would be able to host an FSN meeting. It would give the group a time to meet the team at DOR.

The fee rate for DOR collections has increased to 16%. If you add the % into the accounts before you send them to DOR the percentage you want to add in is 19.05%.

The reports for the month of November from DOR will have 2 collection rates on it.

Nikki is tele-working on Mondays. If you need to reach her on a Monday the phone number is: 503-798-3869.

Manual Update-Crickett Hanna

Manual will be updated with current information and examples of the discontinued fee report. It will be updated and posted to the website in January.

Membership-Margaret Hill

Membership directory will be updated and sent out/posted on the web.

Secretary Position

The group was asked if there were any volunteers for the Secretary Position. No one volunteered so the hosting county will still be responsible for taking minutes. DOC will continue to supply a digital voice recorder to the hosting county to help with taking minutes.

2012 meeting schedule (Note: January meeting has been changed to DOR and October meeting will be in Jackson County)

01/26/12- Jackson Co

04/26/12- Clatsop Co

07/26/12- Coos Co

10/25/12- DOR

Roundtable:

Crickett – Do we have to wait until expiration to send offender who compact to another state to DOR? The answer from the group was: yes we do have to wait until expiration to send the supervision fees to DOR just like other probationers.

Can you change a transaction to correct the payment type? The answer is: NO you cannot change the payment type on a transaction. If it is on the same day you must do an OPM to reverse the transaction and then post the payment again using the correct payment type. If it is not the same day you can use the change function and make a note in the memo section on the transaction with what the payment type was supposed to be. Only the person who posted the transaction can make changes to the transaction. *Information on changing transactions is on page 18 of the fee manual.*

Offender had 2 fee accounts from 1989 opened on the same date. No transactions on either account. Both accounts were closed to VIOL. When offender came back on supervision the accounts got an updated date on the audit stamp and attached the name of the person that admitted the offender back to supervisions name to the audit stamp. Mary Hunt will check into whether or not there is an issue with the audit stamp. Data from 1989 is conversion data and isn't always accurate.

Abby- OPM showing as payments on statements. There is not a way to make it not show up on the statements as a payment. Send current examples to development and cc Mary of statements that show payments higher than what was actually paid due to an OPM being made to try and get the system fixed so the information pulls from the proper area in the system so it does not reflect the OPM as a payment on the account.

Janet -Fee updates need to be sent to Janet so she can update the chart and get it posted on the website.

The sealing report that is sent out by Cathy Snider at OISC once a month was discussed and it was asked that it be sent to the FSN group as well as the SOON group due to the fact that some offenders may still owe fees or may be making payments on that past balance.

Meeting adjourned

Next meeting January 26, 2012 Jackson County. *(Note: See above meeting schedule change.)*

CMS521BP
LEEPJ

Corrections Information Systems
Fee statement print prompt

8:27:21
10/03/11

Type choices, press Enter.

Location COOS
As of Date 10/03/2011
Fee type *ALL *ALL, Code
Lower/Upper dollar limit .00 9999999.00 *ALL, Code
Include Outcounts. N N=No, Y=Yes (CMPO, INPR, UNSU only)

OR

Include Outcounts. *NONE *None, *ALL, code

Selection Criteria

Caseload *ALL *ALL, Number
ID number. *ALL Include leading zeros
Names from/to. *BEGIN *END Partial last names or *BEGIN *END

Sort Criteria

Name order Y
Zip order. N
Caseload/name order. N

F3=Exit F4=Prompt F5=Refresh F12=Cancel Enter=Submit

example supplied by Janet Leep

* This agency also reported PADV's

Pgm	County	Beginning Inventory 7/1/10		New Liabilities		Returned Liabilities		Total Payments	End Inventory 6/30/11	
		# of Liabilities	Total \$ Value	# of Liabilities	Total \$ Value	# of Liabilities	Total \$ Value		# of Liabilities	Total \$ Value
7G3	Baker	85	88,671.72	29	\$21,793.97	35	(\$31,204.12)	\$10,234.82	71	\$69,026.83
7G4	Benton	233	173,920.69	90	\$74,390.75	102	(\$81,260.38)	\$18,550.80	195	\$149,235.26
7G5	Clackamas	1008	764,586.20	898	\$642,761.65	517	(\$380,833.92)	\$110,902.92	1191	\$915,863.19
7G6	Clatsop	408	545,984.76	115	\$199,923.49	138	(\$193,540.39)	\$31,650.88	356	\$520,716.98
7G7	Columbia	202	241,548.43	108	\$125,656.28	91	(\$123,907.67)	\$12,719.30	206	\$230,333.24
7G8	Coos	311	234,279.76	127	\$104,560.15	107	(\$84,614.71)	\$25,939.67	291	\$225,102.53
7G9	Cook	42	27,371.54	9	\$5,974.50	7	(\$4,175.95)	\$2,257.00	39	\$26,913.09
7H0	Curry	41	25,947.20	39	\$22,717.90	17	(\$8,733.04)	\$1,880.34	58	\$38,051.72
7H1	Deschutes	299	196,533.72	124	\$89,892.31	89	(\$62,662.62)	\$18,245.69	301	\$205,517.72
7H2	Douglas	405	300,576.14	235	\$132,707.17	167	(\$124,638.77)	\$32,624.26	408	\$275,830.28
7H4	Malheur	4	9,718.28	0	\$0.00	0	\$0.00	\$0.00	4	\$9,718.28
7H5	Hood River	0	0.00	51	\$39,881.61	1	(\$159.10)	\$5,568.24	47	\$34,154.27
7H6	Jackson	2613	2,363,152.13	831	\$893,192.16	1,067	(\$984,140.68)	\$228,052.74	2116	\$2,045,824.38
7H7	Jefferson	102	46,391.68	57	\$34,186.79	27	(\$12,716.00)	\$6,252.44	122	\$63,519.73
7H8	Josephine	614	651,972.84	309	\$314,285.45	225	(\$248,017.09)	\$39,801.13	645	\$686,652.17
7H9	Klamath	751	529,259.76	438	\$354,502.26	332	(\$239,825.24)	\$42,258.49	789	\$601,746.89
7J0	Lake	68	56,414.26	34	\$33,851.78	24	(\$26,838.26)	\$5,614.34	68	\$57,813.44
7J1	Lane	1076	777,879.88	507	\$406,730.91	405	(\$314,695.28)	\$86,101.49	1042	\$783,805.18
7J2	Lincoln	178	163,564.43	90	\$62,497.95	75	(\$63,951.82)	\$7,462.30	180	\$154,992.44
7J3	Linn	1073	986,200.05	703	\$712,945.43	376	(\$366,786.60)	\$104,190.10	1270	\$1,128,168.79
7J5	Marion	2302	2,139,130.01	994	\$960,073.37	826	(\$817,532.46)	\$203,233.72	2238	\$2,078,427.20
7J6	Multnomah	3642	2,950,491.35	1,922	\$1,737,357.41	1,313	(\$1,134,659.82)	\$267,917.60	3906	\$3,283,391.81
7J7	Polk	316	199,727.84	173	\$121,363.00	123	(\$81,568.93)	\$28,502.46	319	\$211,009.45
7J8	Tillamook	53	35,407.81	36	\$21,234.96	21	(\$13,559.71)	\$3,048.42	40	\$26,264.68
7J9	Tri-County	55	42,133.10	34	\$13,664.40	18	(\$13,347.24)	\$3,753.50	60	\$38,512.63
7K0	Umatilla-Morrow	560	761,964.12	181	\$290,404.42	149	(\$206,580.00)	\$58,197.44	544	\$789,336.60
7K1	Union/Wallowa	62	36,301.32	19	\$10,867.00	17	(\$8,799.20)	\$2,107.82	55	\$36,251.30
7K2	Wasco	209	180,181.13	122	\$88,171.75	82	(\$68,864.95)	\$22,288.74	224	\$177,104.19
7K3	Washington	1759	1,237,735.60	1,166	\$888,899.68	563	(\$390,976.51)	\$205,594.92	2094	\$1,529,948.87
7K4	Yamhill	784	601,039.41	303	\$231,304.37	249	(\$194,621.65)	\$62,602.58	754	\$574,644.55
7K6	Union Juvenile	7	10,643.43	22	\$236,014.88	3	(\$409.22)	\$2,732.78	24	\$243,488.71
7P4	Deschutes Ele Mon	10	2,980.41	28	\$12,778.00	2	(\$520.00)	\$100.00	36	\$16,812.39
7R9	Yamhill WR	63	17,273.35	17	\$3,491.73	30	(\$7,000.60)	\$3,566.56	40	\$10,197.92
7T3	Multnomah Bench	287	73,723.28	212	\$62,410.32	94	(\$24,743.42)	\$14,384.96	342	\$96,800.22
7U7	Jackson Juvenile	7	2,073.92	0	\$0.00	1	(\$812.00)	\$213.64	0	\$0.00

Spreadsheet Supplied by Nikki Bennett