

Statewide Office Operations Network Minutes
Thursday, April 8, 2010, 9:00 a.m. – 3:00 p.m.

Hosting Agency: Wasco/Sherman/Wheeler Counties

Meeting Location: Oregon Department of Fish & Wildlife Screen Shop

Present: Karen Rhein, Multnomah County; Diane Ballard, Jackson County; Teresa Yurkovich, Josephine County; Lee Cummins, DOC; Mary Hunt, DOC; Nicole Rickart, Deschutes County; Judy Bell, Benton County; Jennifer Martinez, Clackamas County; Frances Murrey, Malheur County; Annie Williamson, Compact; Kim Rossotto, Douglas County; Carolyn Knox, Lincoln County; Tina Shippey, Coos County; Angie Gustafson, Linn County; Michael Jackson, Marion County; Christy Elven, Washington County; Cathy Snider, DOC/OISC, Chelo Ramirez, Hood River County; Karen Spieler, Columbia County; Geri Burrow, Umatilla/Morrow County; Julie Davis, Tri-County; Tina Potter, Tri-County; Marla Wiese, Multnomah County; Laurel Howard, Multnomah County; Mindie Everett, Multnomah County, Sandee Norman, Multnomah County; Sue Blanchard, Lane County; Kyle Page, DOC/OISC

Introductions/Welcome

Robert Martin welcomed the group.

Review Additions/Corrections to June Minutes

Mary updated the group on the Measure 57 Treatment Funding program: Phase 1 of programming has been completed, which means treatment records can be marked as M57 TX Y. Once phase 2, which includes the new Texas Christian University (TCU) assessment tool, has been completed, a message will appear in the treatment window if the TCU has not been completed prior to marking M57 TX Y. Automation has not been completed, but even after it is put into production, the absence of a TCU will not stop you from marking a record as M57 TX Y. The system will just display the reminder message.

Page 6: FSN: If county override is yes, you will then be required to put in an end date. When the system reaches the end date, it will automatically change back to the county fee default.

Char e-mailed to ask why her name was on page 3 (top of page) when she did not attend. Judy brought the question for Char so the minutes will be corrected.

Vicki Smith from Benton was in attendance, but missing from the minutes.

E-mail Decisions:

Margaret asked why some counties are not adding the victim's name in the miscellaneous field of the EPR before transferring to another county. Information added to the miscellaneous section is a county by county decision.

Christy emailed to inquire what date should be used when doing a closure due to the death of the offender (DIED code). Tina replied the date should be the date on the closure notice from the Parole Board or the date the court sent the notice. In the case where the county office receives the information of death and informs the court, either use the date of notification or wait for the court to close the case and use the court closure date. File retention is the same.

Susie Schindler question: Cases were vacated and remanded to new sentencing so when does PPS start? PPS starts when the LC case sentence is served, not when resentenced cases close out.

Mindi question: Probation cases being resentenced, meanwhile on caseload closed to RSNT and is difficult to track. If you have concerns you should contact your legal counsel. You may also want to track with a tickler system.

Laurel had a question about a closure by the field to commutation. Mary said the code is SCOM when the governor commutes an inmate sentence. This code is available to the field as an offense closure, not a body closure. Mary talked to OISC and asked if the field could use this code. They agreed and will modify the definition from "...when the Governor commutes inmate..." to "...commute sentence and the offender has no other parole or probation cases."

Shelby Russell had a case of a felony conviction given misdemeanor treatment during the supervision period. She followed the instructions in OPS 12.10, Scenario #3 – MFP. When she changed the Felony=Misdemeanor field setting to C" this changed the type from FPR to MPR but the manual states it would change to MFP. Additionally, the kardex still shows FPR. Mary explained there was programming done to fix the public information screen which caused this. Mary advised Shelby to send a ticket to the Help Desk and to advise the Help Desk to call Mary with any questions.

DOC

CC UPDATE – Mary Hunt, Lee Cummins

Mary: FAUG made a change to the short description of GC01 from pay board fees to pay fee/fine.

Directory Update:

Mary asked if there were any questions about the change to the offender description screen regarding the Social Security No. field. When the SSN verified field is "Y" and

the date and user ID of the staff who verified it shows on the bottom of the screen, the SSN number cannot be changed. When it was learned the both field and institution users were able to make changes to the SSN field even after the SSN number was verified. This has now been blocked. There is only one DOC staff person designated to verify SSN numbers through the IRS. If field staff entered a SSN in the SSN field and the offender goes to prison and a different number is verified as the SSN, the previous SSN will be added to the other numbers screen.

Mary said last month's minutes stated to send website or manual updates to Denise Taylor. This has been changed to Denise Sitler until Manette comes back. Any corrections to the Community Corrections Directory or SOON manual should be sent to Tina Shippey, and she will forward it to the appropriate SOON person for corrections and that person will send it to Denise. The SOON manual and Community Corrections Directory contact is Tina Shippey, and the General Information Page contact is Kerri Humbert.

Mary asked (for Denise Sitler) if there were any questions regarding the reports and clean up lists. The lists are:

Misdemeanor PO/PA: Misdemeanor cases with PO/PA cases where the PO/PA has expired but were not closed. Remember to clean up expired cases before putting an offender on outcount.

Treatment Transition Fund (Not M57): If any questions, contact Denise Sitler by phone or email.

Oregon Address without a Correct Zip Code: Zip codes are only required if there is a complete address listed. A zip code can be used for a homeless offender if it is known what city they are homeless in. Research runs an Oregon Zip Code Report once a year. Spot check addresses to be sure the zip code is in the correct field.

Purge Closed Files report: Mary said Denise only received ten responses to her email regarding how often to run this report. A consensus of the group today was to run the report quarterly. Since Multnomah County does not need this report, Mindie will email Denise and have their county excluded from the report. The report is broken down by location already. It was agreed the report headings will be location, SID, name, admission date, discharge date, ORS number and description. SVDO designation and closure code are not necessary.

Mary asked if anyone is still having problems with the movement history screen. If so, please contact the Help Desk and cc the email to Mary. Marla Wiese asked about backing out the last movement and getting an error message. She will send Mary a screen print.

Lee and Mary were asked to remind all groups if an email has a large distribution list, do not use the "reply all" button. Before you send a "reply all" check the distribution list and if CCB ALL, do not use "reply all." It is okay to use "reply all" for the SOON list.

Judy Bell asked about junk mail and Mary explained we cannot stop it being sent out to our distribution list.

If you send an email to the Help Desk and do not get a response with a PCM (or ticket number) within 24 hours, send another email asking for a PCM number. A response should be received within 24 hours. SUN has a week to respond to you on a ticket. If a week goes by after you receive the PCM number from the Help Desk and you've had no response from a super user, please contact the Help Desk and ask for a status update.

Mary thanked the group for the quick responses to her IT question regarding what version of client access you use. DOC IT is doing groundwork for the V6 operating system upgrade. Everyone on the CC domain will have their upgrades done by DOC. For those counties not on the CC domain, the upgrades will be sent via mail to local IT departments for installation.

Mary demonstrated the new bad address flag:

The change pertains only to the F15 mailing address screen because the fee billing statement system pulls from the mailing address. FSN needs to know if the mailing address is good or bad so they are not wasting postage mailing statements to bad addresses.

To enter the bad address flag: Go to F15 mailing address window. Once you enter bad address "yes" and hit enter, the fee system will change the print statement from "yes" to "no". If the PO updates the address and makes it mailing address "yes" the bad address will flip back to "no" and the print statement to "yes". If the PO changes the residence address and leaves the mailing address "no" (don't update mailing address) it will not change – the bad address will continue and statements will not print. It will not work on the regular address screen, but only on the mailing address. Mary will check to see if the print statement remains "no" when bad address flag is "yes" after offender is admitted from an outcount status. If a PO adds a new address, it defaults to "yes", make this new mailing address. If mailing address is different than physical address, there is an asterisk next to F15.

You should leave bad addresses in the system to preserve the address history. Prior to this programming change, each account had to be manually updated. A service request to run a report for anyone with fee statement "no" or bad address "yes" is pending.

Mindie had a question regarding when data appears on the W/W Offense Screen, but no offender's name is reflected. Ghost offenses appear when a new offense is added to a blank W/W Offense screen (no offender had been previously selected). You will create a ghost if you open any process without selecting an offender and then enter data. If you find a ghost, notify the Help Desk of the Program Names for the screen where the ghost data appears. The Program Name can be found in the upper left hand corner of the screen, example OPS230I. This is a good reminder that when you go into a process, make sure

you have an offender's record on the screen. It is also a good reminder to slow down. Speed is not necessarily a good thing for data entry. Data entry which takes only a few minutes could take SUN or development hours to fix.

Mary handed out the SB1145 lists. Denise and Mary updated the cover letter which comes with the SB 1145 reports.

Item #1: **SB1145 Data in CIS:** In 1997 the list encompassed everybody. The latest list sent out yesterday is from Jan 1 to April 1.

Item #2: **CRTR Discharges:** No change

Item #3: **All Releases with Release Reason "LOCL":** No change

Item #4: **Local Control Admissions without an "L" Admission Location:**

Admission to county location code: If the offender started local control status under community supervision, rather than jail, their names should appear on this list. If the LC started in jail, you would admit to the L location. If LC started as standard or electronic monitoring, etc, at the branch office, admit to your county location code. Names of offenders who started LC at the branch code will remain on this list. You should save your old reports to reference when your new report arrives.

If this is the most current admission for the offender and there is an error, the location code can be changed by using F18. You would place the cursor on first housing line directly below the location line, press F18, enter correct housing location, and press enter to save. This is always done on the housing line directly below the admission line.

SUN is now able to fix all the location code errors in previous cycles. If you cannot fix the error yourself, mark your list with the correct location and scan to the Help Desk. Ideally, once the lists are cleaned up, the only report we will see will be informational. Be sure you carefully check the entire report for your county and "L" location, as the list was not alphabetical. Char will add these instructions to the tutorial and Tina will add to the SOON manual.

Previous cycles with the "F??" in the sentence line: These should all be fixed, with the exception of the pre-1989 conversion data (unless you have all the file material and know exactly what the record should look like). If you happen to have all the file material and have a current ticket into SUN for the offender, the SUN person may be willing to help clean up your pre-1989 conversion data.

Benton County received a revocation order with errors. While waiting for the amendment, the offender was admitted to LC in Lincoln County. The offender should have started LC in Benton on their case and then moved to Lincoln. Once the amended order is received, a ticket to SUN will need to be entered to have the Benton local control case inserted.

Karen Spieler had an offender with two felonies and numerous misdemeanor and municipal court probations, which were revoked. The LC sentences were consecutive to

the others. While the offender was serving the misdemeanor sentence, he was furloughed to outpatient treatment. Due to the LC sentences being consecutive, his local control will not start until November, when the misdemeanor sentences end. When Karen admits the offender in November, what location does she use? **Answer:** It depends on who is supervising the offender and Karen should check with the Supervisory Authority. In November, if the offender starts the LC sentence in jail, she would admit to LCOL. If there is an agreement the county office is supervising, at that time, she would admit to the branch location code. If the offender serves any part of the LC at the treatment center, the code for treatment is INTX.

Local control question: Can there be a local control sentence without PPS? Yes, although that was not the intention of the original legislation. If a revoked probation order is received without PPS being addressed, some counties send a letter the judge to be sure the intention was not to order PPS. If PPS was omitted accidentally, the court may amend the judgment to include it. If the intention was no PPS, enter the local control sentence and close the line to expire once the sentence is served. At the end of the LC sentence, if the offender had open probations, you would close the L line to EXPI and then release back to probation status.

OISC/INSTITUTION RECORDS

Kyle introduced Cathy Snider, Sealed Record Coordinator for OISC. There were no concerns expressed regarding the sealed case reports and it appears everyone is finding the reports useful.

HB 3508, 30% sentence reductions were audited by the department of the Secretary of State. The audit has been completed.

When sending electronic documents to OISC, it does not matter what order they are sent in, although some e-files have been too large. Some of the judgments from Douglas County were sent as secured documents and OISC was unable to open them. Douglas County appears to be the only one with the problem. Multnomah County also receives secured documents, but they are printed and scanned before being sent to OISC. Most counties are printing and scanning documents.

Tina Shippey: If an inmate participates in drug and alcohol treatment in a county run treatment program (which makes the treatment records property of the county) what happens when the offender's criminal record is sealed? Are the treatment records also sealed? Kyle and Ed Jones, Dept of Justice, believe all treatment records would be sealed. Kyle suggested we check with our own county Counsel.

Kyle - paraphrasing Pam Wood (AAG opinion from 2000): To seal means to make unavailable, not destroy. When an agency receives an order under ORS 137.225 to expunge or seal records, the agency should not delete or destroy records, but should merely render them inaccessible. Oregon Supreme Court defines the meaning of other official records of the case as related to the same aggregate set of operative facts as those

that gave rise to the arrest record or conviction, in other words, the factual circumstances that were part of, or immediately surrounded, the person's commission of the crime and resulting investigation and adjudication of that crime. Based on the state's well established and consistently applied rules, it does not appear readily to relate to files from law enforcement, the court, or to the persons generating, such as disciplinary or medical records. Such reports that would apply are police reports, indictments, trial transcripts, judgments, PSI, and sheriff statements. DOC could chose not to seal the records relating to the person generally. DOC may maintain a log of sealed files, as the log itself does not appear to be a record of the case. Alternatively, DOC may chose to seal records which in detail or describe the conduct that gave rise to the conviction that is subject to the case being sealed. Treatment records do not appear to be a record of the case, but supporting memorandum.

If you still have a file that is no longer in CIS, Cathy Snider can check her data base and provide some information on when file should have been made unavailable.

PAROLE BOARD

No one from the Parole Board was present.

COMPACT

No questions for Compact.

USER GROUPS

Due to the long agenda, it was decided to skip this section.

OPS RELATED ISSUES

LEDS/WebLEDS

Angie had a question regarding an EPR where the SID and OCA numbers were different. To fix: On the MPR mask, enter the incorrect OCA number in the identifying data section. In the modify section, enter the correct OCA number (same as SID number) and hit enter.

OPS Manual

13.1 Inactive supervision for local control – manual needs to be updated.

Local Control

Angie had a question regarding an offender who had been local control, then went to prison and was released under the jurisdiction of the Board. The Board case then expired and the offender got a new local control case, but the old override is still in the system so

it shows as Board. Delete the old override (F15). Then go back to the offense screen and do F14 to recalculate.

Other OPS Related Issues

Overriding billing while in treatment: We cannot change the fee amount to zero. You could choose to change fee amount to \$1, and adjust the balance to zero later. Any change to fees is up to FSN. Next meeting for FSN is in Multnomah County on April 22.

The UNSU code has now been updated to accommodate local PPS cases. UNSU now reads, "Changes the offender status to outcount UNSU: used when a parole or PPS offender is placed on unsupervised/inactive status when the period of active supervision has been completed as determined by the Board or LSA."

Lee told the group about the upcoming June 8th demo of NCOMS as a possible replacement for CIS. If there is an opportunity for user groups to test the system, Lee may be asking for volunteers.

Lee: The ODARA tool is just about finished and there will be a manual which will be provided to SOON. After ODARA is complete, Joyce, the programmer, will start work working on the polygraph module for SOSN.

Lee: The new CIS/ISIS Users Manual is on the DOC website, in Community Corrections Networking Groups. This is an update to the old flipchart for PPOs. You can also see the SOON and FAUG minutes at the website. Lee reminded the group Char is still available for PPO or support staff training. If interested, contact Lee.

Char will update the CIS Navigation Manual and it will be added to the website. There are many ways to move around in CIS and this manual will be helpful to everyone. The consensus was also to add the navigation manual to the tutorial.

INPR: Mary explained why the INPR code cannot be changed to a different code. The law on this actually uses the term "inactive" probation. The law originally said "unsupervised" for Parole and Post Prison and was later changed to "inactive". Once the UNSU code was created and there was historical data tied to it, it could not be changed. We now have inactive probation cases tied to the new INPR code and will have to continue using that code.

Mary discussed the inactive probation reports. The first reports had errors in how the offenders were selected. The criteria looked at all sentences, included misdemeanors, and that skewed the review dates. The report has since been changed to exclude misdemeanors.

There are currently three reports: ASR/SSR/TPD for Board cases; SSR for LC PPS, and one for Inactive Probation review. On Board cases, the offenders are pulled from PBMIS,

based on ASR/SSR or TPD date. For the local PPS report, the criteria looks at the offender status, then looks at all open felony cases, and calculates based on start date, end date, and sentence length.

Misdemeanor and incoming Compact cases are excluded now, but were not excluded on the first report. Outgoing CMPO cases should be excluded from the inactive probation report, but were also on the first run. Parole and Post Prison offenders on CMPO, IMMI, REVP and INAC status do not qualify for unsupervised status, but they will be on the report because we have to send the extension letter to the Board or LSA. If the status is probation with outcount CMPO, they are now excluded.

Offender will appear on the reports as follows: First on the 60 day report, then again on the 30 day report. The probation report looks at all open felony probations, not just the longest running case. If there is someone on the report who should not be or someone who should be on the report who is not, contact Denise Sitler and she will forward to Shawn Miller. Although the law allowing probation cases to become inactive sunsets on June 30, 2011; it includes all offenders sentenced on or before June 30, 2011. So, if someone is sentenced on June 30, 2011, depending on the length of probation, they could be showing up in reports for up to three years.

There is a plan to consolidate inactive LC PPS and probation into one report, with the review dates in separate columns. The consensus of the group was to leave the reports separate. Mary will inquire about leaving them separate. The law allowing local PPS cases to become unsupervised will sunset, however, there will more than likely be a push to continue, so it makes sense to keep the lists separate.

POST NOTE: After discussing the issue with Research, and considering the time and resources involved in changing the report again, DOC has decided to continue with the consolidated report for now. If, after trying the consolidated report for a few months, you find it causes problems with your business practices, DOC will look at this issue again. Mary will check with SOON Reps at their June and/or August meetings to see if counties are having problems with the report.

Karen Spieler/Columbia County reports their director advises Columbia County will request bench probation for cases eligible for inactive probation. Lee discussed that for research purposes, it may be difficult to capture which cases were modified to bench and which cases were modified to bench due to being eligible for INPR.

Christy said the practice in Washington County is to modify cases to bench if eligible. The eligibility criteria would be the same as INPR. Mary will speak to Mark and ask him if there would be any problem with Washington County's practice.

POST NOTE: Mary asked Mark Cadotte if DOC has any concerns with counties closing cases to BNPB instead of INPR. The answer is NO, they do not. Mark said closing to BNPB is perfectly acceptable and is a county by county decision/policy.

A sample Opt 23/24 forms went out to directors and FAUG for moving cases to INPR, however, each county can develop their own forms.

Only felony probation is eligible for unsupervised (INPR). Mindie asked if an offender who had both misdemeanor and felony probation could be eligible for inactive. Mary said the felony is eligible to inactive, but if the offender still has active misdemeanors, and the PO chooses to continue to supervise, you would close the offense line to INPR rather than a body closure. INPR should work for both body and line closure. Mindie asked how to track a case once the offense line is closed. The problem would be at final closure because once the offense is closed to INPR it does not appear on a field sheet and could be missed. Mary will ask for a programming edit to not allow a body closure if there is an offense closed to INPR since it is not a permanent closure.

If a PO wants to sanction an INPR case, it must be brought back to active first. Judy Bell asked if all the offense lines are closed to INPR, would you then do a body closure. We only close offense lines when there are other open cases. If all offenses are closed, only a body closure is done. It was asked if there would be a plan later in DOC for a field for the eligibility date for inactive supervision. The answer was not while NCOMS is pending. Mary stated the Directors at OACCD were adamant that cases be eligible for inactive only one time. Mary reiterated an offender would not be eligible for inactive if there was a new conviction during the supervision period.

Criteria for eligibility for inactive probation:

(3) Compliance with the Conditions of Probation and Supervision Plan: For purposes of these rules an eligible offender shall be deemed by the supervisory authority to be in compliance with the conditions of probation and any applicable supervision plan if:

(a) All special conditions imposed by the sentencing court for the offender on the term of probation under consideration for inactive supervision have been satisfactorily completed, including the full payment of any restitution or compensatory fine ordered;

(b) There have been no technical violations of probation conditions reported to the sentencing court for the immediate six months prior to the consideration for inactive status;

(c) There have been no new crime violations of probation conditions reported to the sentencing court during the term of probation under consideration for inactive supervision; and

(d) All terms of any applicable supervision plan have been satisfied.

Karen Spieler asked if an offender has one felony and one misdemeanor, and the felony is closed to INPR, would we make any change to the EPR. The EPR status stays the same. Offenders are not eligible if there are any new crime violations at any time during the period of supervision so an updated CCH would be run prior to placing an offender on inactive probation. Tina asked if an eligible case was not closed to INPR, would we be

required to have some proof of ineligibility. Mary said the PO should make a chrono when an offender is not eligible for INPR.

Service Request Update

Service Request #2049 –WEB LEDS enhancement: No change from last time, it is still with contracts. Once they finish the contract, it will go to Kevin Potter to make changes on the WEB LEDS side. They will probably not be able to work on it right away because of the V6 enhancements, but hopefully sometime this year.

OPEN AGENDA

Data warehouse showed a PO caseload from HOOD appearing on WASCO. It was suggested to go into CIS and look at caseload numbers and check if the Hood PO's caseload number is added.

Within an office you can add chronos without adding the offender as secondary. However, if you need to add chronos to an offender supervised in another county, you must first add the offender to one of your office caseloads as a secondary. A PO wanted to add chronos to an offender assigned to another county, but was unable to. This might also occur if chronos were locked.

If you want to view each offender's information in a caseload, enter a 5 on the first offender, then hold down Shift and hit F1, it will repeat the 5 on every offender. This allows you to view the information by just hitting enter, without having to exit each time and type in 5 again.

When changing the PO name on a caseload number to "vacant" be sure to remove the PO information which is entered below the green line (Option 18).

Temporary court orders: Should we wait for the official order before entering an offense. Yes, as some temporary orders are incomplete.

A question was asked whether you can enter an F8 note on a release plan. F8 notes can only be entered on the offense screen and are used for information specific to the offense. F7 remarks are accessed on the movement history screen and encompass anything that happens with that offender. F7 remarks are in regard to the offender. F8 notes are in regard to the offense.

A question was asked as to what report you run to check all your EPRs? You can run the QLW on a mailbox (QLW/MBX#). This generates a list of LNU numbers for each EPR assigned to that mailbox. To see the EPR, you would run a QLW/LNU/ for each LNU number.

Angie has a PO who wants clerical authority to enter text on condition fields. A User Authorization Form should be sent to Diana Schimschok requesting the additional authority.

Any Parole Board questions, contact Michelle Mooney.

Tina Potter had some problems with a WA compact. If anyone has a problem with WA, let our Compact office know.

Jennifer Martinez brought a question from her intake staff who wanted to add the financial package to offenders. All special condition changes go through FAUG.

Clarification on the LEDS rule regarding CCH being kept in files: Keeping LEDS in working files is a county by county decision. LEDS rule states the CCH is only valid for the day it is run. SOON policy is to pull CCH material when a file is closed or sent to another county.

Judy Bell volunteered to test the CIS Menu Navigation manual which was recently completed by Char.

Meeting adjourned at 3:20 p.m.

**Next meeting in Coos County
June 10, 2010**