

FSN MEETING

MINUTES

APRIL 26, 2018

HOSTED BY MARION COUNTY

ATTENDEES

Summer Smallwood, Benton County; Janet Leep, Coos County; Jennifer Mahlum, Coos County; Patty Gaskins, Douglas County; Pam Mathes, Klamath County; Kathy Bafford-Foltyn, Klamath County; Lili Frank, Lake County; Victoria Horlacher, Lake County; Bev Mills, Linn County; Heidi Grieser, Marion County; Karen Foresee, Marion County; Kimi Hulke, Tri County; Tammy Sundin, Umatilla County; Christy Elven, Washington County; Vicki Wood, Yamhill County; Lee Cummins, DOC; Nikki Bennett, DOR; Bryan Theis, DOR.

OPENING & INTRODUCTIONS

Lt. Kevin Karvandi welcomed us to Marion County. Marion County is the second largest county in Oregon. Kevin said that he knows how hard we all work and they appreciate everything we do. They couldn't do their jobs without us. We all went around the table and introduced ourselves.

REVIEW/ADDITIONS/CORRECTIONS TO JANUARY MINUTES

Minutes were reviewed. No changes needed.

DEPARTMENT OF REVENUE – NIKKI BENNETT AND BRYAN THEIS

Nikki said Senate Bill 1067 passed, so DOR is working on their system, making changes to accommodate sending to private collections firms on behalf of State agencies required to use those services. Only Linn and Douglas are required to use the services. The deadline is July 1st. They are doing a lot of testing so it may be hard to get a hold of her. Nikki handed out an example of the new monthly reports we will receive every month. There are additional fields. This may or may not happen but she wanted to show us it since the time frame to get this accomplished is coming right up.

Phase one is for Linn and Douglas since they are required to use the service. Phase two will be for the other agencies who want to use this, but are not required to. This should hopefully start in August. The reports will be changed effective July 1st, but you won't get July's until August 1st. There is going to be additional fields on the form. The report will probably look like this, but it is subject to changes. Nikki went through the report and explained some changes:

- AGING REPORT – The first page is the Aging report. They are adding the column “Tax” (which is currently called Principal). The other additional columns are “Penalty,” “Interest” and “Fee.” Fee is the collection fee amount you will charge the debtor, should you choose to do that. They wanted to see the breakdown of the balance. The “columns in red should equal the amount under the “Balance” column. “Status,” the column on the end, lets you know where your debt is. If it is at a private collection agency they will use the code “At PCF.” Or, if it is still at Dept of Revenue as an offset program, and they recommend a write-off, they will use the code “Rec WO.” Lili asked if “Rec WO” meant that DOR and the collection agency weren’t able to collect the debt. Nikki said that is what it means. She explained the debt is uncollectible and they can’t get anything from them. The debt went through the process required for write-off. You will write off the debt and the balance sits in DOR’s system. Then, for example, five years goes by and all of a sudden something changes with that person and an offset hits that account. DOR will take it out of the offset program, we will take it out of write-off status, and then DOR will go after that person doing full collections on them again.
- STAT REPORT – DOR is adding just two action codes as of right now:
 1. Rec WO – (Recommended Write Off)
 2. TO PCF (To Private Collection Firm.)
- ZERO REPORT – They added a new column called “Action.” It will be either ‘PIF’ (paid in full) or ‘C’ - it was cancelled.
- PAYMENT REPORT – Has 2 payment reports. The top one passes the collection fee on to the debtor. Private collection firm has higher rates than DOR so that is being passed on to debtor. The bottom one does not pass the collection fee on to the debtor. Under the Type Code column, they added a ‘T’ which stands for private collection firm payment.

DOC UPDATES – LEE CUMMINS

- Melissa McNabb does the updates on the websites, but she unexpectedly had to be off for a week. The person who was going to train her has taken as much information to update the different user websites, including FSN. Unfortunately, there were some attachments that weren't included, but Kelly Ketchum will help out in this area to get this caught up.

- Lee was also wanting the groups to get their attendance rosters updated. DOC is conducting Community Corrections Reviews, with Linn County being the first pilot county. One of the things they will be reviewing is the attendance at the user group meetings. Hopefully the Directors will allow more support staff to attend some user group meetings.
- A question from the IT department on the use of option 23, which is the word merge from the caseload. It is a very old option for when Word Perfect was around. Not too sure if anyone would even have Word Perfect anymore. So IT was wanting to do away with option 23 (not option 24). They ran a query and did find some people still using option 23. It looks like option 23 works with Word, so IT is thinking option 24 would work for them. They wanted to know how many people were using Word Perfect. No one at FSN was using option 23 and had no objections in removing it.
- On March 23, 2018, Patty Cress who is from the Board, sent out an email about changing one of their SC 10's to a new General Condition. Currently probation and post prison conditions match the Board's, all the way through number 13. The Board only had 13 conditions. Everything else was a Special Condition. We had more conditions and currently have 17. The Board was going to make one of their Special Conditions, General Condition 14. However our General Condition 14 is a sex offender condition. So in a meeting it was discussed that it wouldn't be a good idea, especially in CIS, where there are only one set of General Conditions. We would have had to make another condition split and have Board General Conditions and Probation General Conditions. So the Board decided to go with General Condition 17 because it closely matches our General Condition 17. They will have General Conditions 1 through 13, then 17. The Board's General Condition 17 will say 'Submit to evaluation or assessment to develop a case plan for supervision or/and treatment. Our number 17 was just revised to add a piece to it but it states 'Submit to a risk and needs assessment as directed by the supervising officer and follow reasonable recommendations resulting from the assessment.'
- IT has just hired a new IT programmer but she will need to get up to speed with DOC. IT is looking into a new system again.
- There has been much confusion about the sanction reports. We have the Sanctions with Movements report and the Sanctions without Movements report that Melissa sends out. This is only an informational list. This list is the only automated way to track what is happening in your county. Now, Denise Sitler sends out a 'Sanctions Other Than Complete' report that we need to look at and manage. It has nothing to do with sanction movements, but is a list of every sanction that is in our county that is currently open. Check the timing on the sanctions. Look through this list and if it is over 30 days old, someone needs to

do something with it. There are many sanctions that are over 1000 days old! It is very important you check these because they won't go away. The Board can't do anything with sanctions over 120 days.

- There was a big turnover in research. They are short-handed and have a lot of work to complete.

MANUAL REVIEW – JANET LEEP

Review Option 7 through 17, pages 44 – 65

- Option 7 – Reconciliation Screen – Will only give you the payments. If you did an over payment or under payment, you will not balance to this report.
- Option 8 – Reconciliation Report – Use option 8 to print payment deposits for selected day only if you use Option 7 Reconciliation Screen.
- Option 9 – PO Account Report – Prints a list of all offenders on a caseload and lists when they last made a payment.
- Option 10 – Transaction by Receipt Number – Prints all transactions by the computer generated receipt number – Great report if you are missing a receipt.
- Option 11 – Print Statement/Bad Address Report – Shows bad addresses and when they went bad. You can run it by fee type.
- Option 12 – Discontinued Fees Report – Good to run on a regular basis. Finds fees that need to be brought forwarded. There will be a date range that you can choose so you don't get all of them which sometimes can be overwhelming.
- Option 13 – County Override Report – Used to identify accounts that have been overridden by your county based on override end date selection criteria.

- Option 14 – Work With Supv Fees/Receipt Printer/Dor – You are only allowed to make changes to your individual county and “L” location’s default setting. You can see other county’s settings, but you can’t change them.
- Option 15 – Work With Fee Text – Free form text to print on billing statements
- Option 16 – DOR Collection Account Status Report – Print report for the status of DOR collection assignments and/or adjustment memos based on the selection criteria.

- Option 17 – Open Fee Accounts With Expiration Dates – Lists all fee accounts with an expiration date based on selection criteria.

ROUND TABLE:

- Angie asked the group if we should have a separate meeting just for Judy's training or combine it with our next FSN meeting? Different counties offered to have the meeting in their county so we have a more centralized location. When Judy returns, Angie will talk to her about what we should do and then decide on the location. But for right now, we will stay with the next meeting being on 7/25/2018.

****POST NOTE: FEE TRACKING TRAINING** is set for Tuesday, June 19, 2018, 9 a.m. to 3 pm at Linn Co. Parole & Probation, 118 SE 2nd Ave-Suite F, Albany, OR.

- Lili Frank said she is taking a position as a Probation Officer. Her replacement at FSN will be Victoria Horlacher. We all welcomed Victoria. We will miss Lili but congratulated her on her promotion.
- Janet said the DOR assignment will not print more than \$9,999.99. She recommended getting a ticket for this to increase the amount.

Next FSN meeting: July 25, 2018 in Coos County.

Chair: Angie Brown, Josephine County

Co-Chair: Amanda Broome, Yamhill County

Secretary: Patty Gaskins, Douglas County

Co-Secretary: Jeannie Olson-Shelby, Lane County

FSN Manual: Janet Leep, Coos County

Membership: Bev Mills, Linn County