Colorado Trails User Group
Meeting Minutes – February 25, 2011

Present:
Sherrin Ashcroft, Theresa Campbell (by phone), Melissa Maling, KathyChase, Grag Crawford, Taryn Davids, Dee Grayson, Sherry Hanson, Van Head, Kimber Johnson, Bill O'neill (by phone), Ki`i Powell Shelly Serfoss, Lucienda Connely, Matt McGaugh

Trails Update:

Everyone is invited to attend the next design meeting: March 10 from 1-4 for next Alerts meeting to design the Face to face contacts alerts system.

- Group would like a good definition for accounting information for "non-reimbursable", "county only" etc.

March 2011 Trails Release

559 Primary Affiliation for DYC and CW. The project will add a "Primary" Checkbox to the Staff Affiliation window so that the primary county affiliation can be identified. There will also be a Primary Affiliation column added in the grid with a "Y" identifying the primary affiliation. There can only be one primary affiliation for DYC and one primary affiliation for CW for each county. This will be a mandatory field for DYC only.

1003 Miscellaneous Issues and IV-E Clean up. There are several outstanding issues with Project 1003 (IV-E Data Integrity/Force Re-Det) that need to be fixed: Accept Eligibility, Court Order Info not printing on report and US Citizenship. We are also going to correct a number of outstanding IV-E issues deemed as 'critical' by State DCW. Many of these issues are related to missing business rules in the IV-E module for handling specific situations although there are a few that are just fixes. We are hoping to deploy approximately 11 fixes this coming Sunday during the Trails Maintenance period.

1014 Ancillary Systems Phase II. This phase of the project will include 12 new alerts as follows:

1. Providers due to Expire in 60 Days(EXEP11)
2. Annual Permanency Hearing Due(EXEP28)
3. Safety Assessment Due(EXEP43)
4. Provider closed but has open Service Auths(EXEP50)
5. Notification to the worker that a provider has an open Investigation (current notification does not go to worker)(EXEP47)
6. MOE Determinations Needing Completion (Re-Det)(EXEP39)
7. MOE Determinations Pending (EXEP32)
8. Open Medicaid Entitlement/No Open OOH (EXEP31)
9. Open Placement & Removal/No Open Medicaid (EXEP44)
10. 90 Day VPA Expiring (EXEP40)
11. 180 Voluntary for Clients with PRNP Legal Custody status (NEW)
12. Approval Due for 90 Day FSP 5A (NEW)

1019 Family Assessment Response Phase IV. There are a number of enhancements included in Phase VI that will improve the usability and data collection efforts for the FAR grant.

1029 DCC Audit reports Phase I. This request will create 2 new summary reports needed by DCC for Critical Incidents and Stage II information in Trails. The CIR Summary Report will be included for March release.

1102 Trails Security Audit. This project includes 4 reports, 2 for county users and 2 for state users. These reports will be used to assist in auditing security profiles to ensure that the combination of security profiles assigned to a user does not cause a conflict of interest or promote the potential for fraud in Trails. Additionally, there are several front-end changes to include a new window in Trails Staff ORG that will show Trails user profiles. This new window will be a VIEW only.

June 2011 Trails Release

923 Provider Resource. Includes Project 575. This project will change the Provider/Resource Area to accommodate the Provider Usability Recommendations from CTUG and to modify the Staff members requirements list. This project will also modify the provider toolbar, service toolbar and Provider Search and Search Results windows. The Provider search function in Trails will be enhanced to provide a more extensive search to include Staff members and AKA names listed in Trails.

938 Recovery Module. This is a project to add recovery functionality to the Trails Fiscal area. It will allow counties to set up claims for providers who owe money to the state due to overpayment. It will also provide a way for Trails to account for EBT Grant Repayments and well as EBT expungements so we are in balance with CDHS Accounting. This is a federal audit requirement.

939 IV-E Sub-Adopt County Only Entitlement. When a child is determined IV-E Sub Adopt eligible and this funding source is entered for a child in Trails that is the funding source the payment processes under. However, if at a later time the child is found to not be IV-E Sub Adopt Eligible because a judge signed the finalized adoption PRIOR to the county rep and parents signing it, the child is not only not IV-E Sub Adopt eligible but also more importantly, all Sub Adopt payments to the parent are now COUNTY ONLY dollars. Need a new entitlement to ensure when this situation occurs, the payments become county only dollars.

940 Relative Guardianship Phase II. There are several additional requirements needed to be in compliance with Federal and State rules with regard to relative guardianship.

1004 Trails HELP. This is a maintenance project for Trails and will change the way field level help works in Trails. Currently each field is linked to it's own individual file. It will be changed so that all fields in the window (not the help button) are all linked to a single file.

1014 Ancillary Systems Phase III. This phase of the project will include the Face-to-Face contacts alerts so that workers are able to see when a Face-to-Face contact is required for the clients on their caseload.

1029 DCC Audit reports Phase II. This request will create 2 new summary reports needed by DCC for Critical Incidents and Stage II information in Trails. The Stage II Summary Report will be included for June release.

1106 State Ids for Collaterals. Functionality is being added so that counties may query SIDMOD and assign a State ID to Collaterals with specific relationship types, so that a CHATS referral may be entered into Trails and sent to CHATS electronically. The Collaterals search functionality is being improved with this project.

Van: Budget cuts will not be affected.

Contractors IV-E module between March and Sept.

Ancillary system continue phasing in.

Training team- Art Atwell and his team have completely integrate training among both. Added two days into Case Worker training. Remove additional Navigation Training for July implementation.

Discussed that Trails probably needs new "academy" security information that will keep a person a worker from being kicked out of Trails and the portal. Solution may be to send out a helpdesk ticket that keeps the person from being deleted.

Action Item: Van will look at the operational side to clean up the process.

Access to CYFF because it goes down earlier. There has been a change in the process and it takes longer to clean up CYFF for the new day. Wilson is responsible for this update.

Need volunteers to redesign the assessment interview window to look like the contact window and legal custody enhancements issues.

Practice Initiative/Performance Mgmt Workgroup Update:

- Did not report.

Refresher Training Update

- Did not report

Enhancing Trails Placement Packet

Report that is not used very often: Pulls across case information on placement: Out of home placement information packet"

Additional information from new windows that is not being pulled into the report. Group met to discuss the report and brainstorm what they want to change and update.

- Idea to have a button in the health passport to generate the report.
- Another option would be to do it in the Service Authorization window
    - Idea to have it in both windows.
    - Idea Put it in the Serv/Prov toolbar as it's own window- it would update information into the Health passport if you add to the window.
    - Discussed a placement packet that would allow the worker to NOT enter the provider information: for Exploring to place the child.
    - Discussion that it would be great to have a packet for the CPA's to have the information so they have it in the child's file and do not have audit issues from the State.
- Private insurance needs to have a"none" or "unknown" option.
- You cannot print the packet until you have entered the insurance information. Answer the Medicaid question separately based on the entitlements.

- Ability to show or not show prior placements in the printout. What information do you want to show: Not the name but the Dates, level of care and; CPA agency or "county home", name of residential facility, Leave reason, address and phone numbers. DYC placement history.
- Caseworker and phone number would be the ellipses buttons; Phone number would update from Trails; Caseworker email also. It will update from the window if needed.
- GAL required, (not assigned option or unknown)
- Probation office and NONE if not one.
- We will be looking for multiple collaterals options to pull into the report.
- Next Court Date; (draw from court and be able to type into the report) Hearing type, Child required to attend selection
- School, Grade and Special Education services; District and phone number, status etc. (IEP etc; Yes/no in the special education field)y
- Reason for placement/ Narrative
- Social History: Prior History of the child and give "guidance" of what is needed in the field. History field out of study Current Functioning.
- Behavior/Emotional problems can come from the Medical History/conditions.
- CHRP child, custody status
- Injuries in time of placement; Variable for the window. Option of none
- Allergies are in the medical history conditions
- Providers will need to have an 'Unknown' option in the window.
- Family composition: Mother/ Father address and phone number is required. # of siblings and other family members (are they allowed to have contact with them), If rights have been a TPR/ Adopted/Guardian parents
- Transportation of child for visitation plan, restrictions and special transportations (Any safety issues and special concerns with bio family)
- Permanency goal for child
- How long do you expect the child to be in the facility? (TRCCF and Group Home)
- Physical description of the child
- Cultural Preferences and considerations (if a child needs a specific foods/ hair length etc. FP must need to be addressed) Do more research to see if there is a better field.
- Medications is required "Medical authorization information" Separate forms for this and have an edit check with the medication the child is on currently.

- Need to provide providers the treatment plan.
- Emergency/ Blank form
- Mental Health Diagnosis/ Alcohol Sub Abuse etc.

Imaging in Trails

- Had a meeting with the Oracle folks for Imaging
- Would like the data to be stored into Trails. What types, total number of documents per month, Meta Data fields do you want to report on?
- Scanned images that can be used in a crystal report.
- What is the process we would used for images; could be a workload issue?
- We would need about two servers for image holding. Any generic scanner with software would work.

Types of audits etc.

Come up with a wish list….such as a licensing requirements etc.

Action Items: Kathy will come together with other subgroup to come up with answering all the questions.

Trails Ad-Hoc Reports Group

How many kids discharged from kinship placement and went to a different setting and percent. Does not have a going home. Date range to be entered by the person running the report.

Review of discharge setting of where the kids are going? For next month.

Core services report: Children benefit from Core services. On portal under Services Placement

If it is an adult it will count all the kids in the home if child is receiving the service then it will only count the kids receiving it.

Core outcomes report by service type;

AFCARS/IV-E Desktop Guide and Matrix- Review

Action Item: Kimber will begin process to discuss with AFCARS/NCANDS experts and Create a placement holder service authorization for a runaway.

We went over the matrix and reviewed the information.

Action Item: 4E vs. Admin Cost and non Admin Cost question for Les./

Action Items: The Medicaid column needs to be looked at in the matrix.

Required Field Document- Update

Action Item: Kimber Give to CTUG as a soft file and update to the job aid.

Logging Case/Referral/Assessment Access Activity, PRAN Letter

- If you went into a referral/assessment/case it would log it into a table.
- **Action Items:**
  - **Graig will create a project request to create the project to stamp the log in history.**
  - Help Desk Ticket: PRAN Letter: The approving supervisor name should be the person that approves the findings.
  - Help Desk: PSDA(professional Service for Developmentally or physically handicapped: puts an automatic end date when you enter the start date. It becomes the end date the same as the start date.
- Medicaid for Non US citizens: Client Gen Info window and you check non documented alien. No connection to Medicaid. They are not entitled to Medicaid unless it's an emergency. Greg thinks only a pop up would work.
  - **Action Item: Dee will double check the Rule Vol VII on the changes**
  - If the rules are true, then we will create a help desk to create this.

Action Item Help Desk: Allow the user to create a 4B and 4C as long as the case is open

Action Item Kathy Help Desk: NCFS- use the Close Date not the Date the approval is being requested./ Kathy will check with Mimi to make sure it will be okay.

SWAT

Review CTUG project Priorities for next CCB.

Default to trails provider for project #1130

Put the filter on referral type

Action Item: Graig will email George with some suggestions. Approved

#1129- It looks fine and approved. We would like to have access this window too.

#1104- Emergency pulls into module after the 3 day window we create an alert to notify the worker to change the removal manner- modify the module design to exclude the emergency placement with reasons why.

Create an alert to change the removal manner if after 4 days to change to voluntary or court ordered.

Approved it.

Health Care Related data for Adolescents

Need to pass out health care information when a child is involved in Chaffee or in an emancipation transition plan. They would like to have this documented in Trails by a yes / no check box.

- **ACTION ITEM: Bob Coulson will write up the request.**

Teen pregnancy / trying to capture vulnerable pregnancy issues. The data is to identify if this population is more vulnerable than the rest of the population. Colorado Child's Health Access Project (CCHAP) is already working on this project and already gathering that data, and maybe our funds need to go towards trying to access this data. Graig felt if it goes into Trails then it should go into the 90 day review window because this one is revisited on an ongoing basis.

- **ACTION ITEM: Bob Coulson will follow up with the CCHAP organization to see what data they have and can it be accessed.**
- **ACTION ITEM: Bob Coulson will check with other States to see how they are gathering this data.**

PA4 Initial Brainstorming session for new PA4 design

When it is a PA4 case there are lots of required areas in the assessment that are mandated to do in order to get to the PA4 case. But with FAR/DR it goes from referral straight into a FAR case, and they are wondering if this functionality could be used as a pilot for PA4 cases. It would be a PA4 assessment in the FAR world. Need standardized assessment for PA4. If it is a delinquency case there is no place in the current assessment to capture court information. Larimer is asking if they could use the FAR case as a pilot for PA4 assessment to try and figure out what would work and be needed for the creation of a PA4 assessment.

- **ACTION ITEM: Kathy Chase will talk with developers to see how much work it will take to change the FAR structure so there is a PA4 case type for Larimer to pilot. How can we modify PA4's to bypass the randomizer?**

Review CTUG Project Priorities for next CCB

These are the top three in the order CTUG wants them to be worked on:

1. Multi case transfer
2. Case access log
3. FSP

Next Meeting / March 25, 2011: 9:00 AM – 4:00PM Location: Jeffco DHS

Counties that are doing an early roll over- what is the reason behind it. Is there a justification or a money issue.

Fiscal Analysis- How many adoptions are CPA? What is the cost? Adoptions that are homes from a CPA. Average of difference in payments from CPA and FC. Also make sure Chantel has been in the loop on the issue.