

OCATS

April 30, 2010

9:30 AM – 12:30 PM

Introductions:

Kaye Peters provided the welcome and introductions. She asked the participants to introduce themselves.

Review and Approval of Minutes from 2/26/10. Kaye asked for questions or concerns, and received none. Darren – minutes passed.

Review of Action Items:

VoIP Updates – Larry Lynch

At the last meeting Joe Krockner asked about the VoIP solution for the counties and that they wanted to use SNAP funding for this solution. Larry contacted the 15 counties and there were 4 counties with SNAP funding available with interest in the VoIP solution. The proposals to these counties will be going out next week or the week after. In addition, OIS is working on the large Montgomery County VoIP project.

Randall Derrick – About a year for this to be rolled – call center maturity is progressing with the Montgomery effort for remaining counties. Larry said that the call center technology is operational in Columbus.

Call Center Express – can reside in the router at the agency but not all the functionality of the state's enterprise solution.

Wanchick – we are replacing the infrastructure. OBM call center and the ODJFS call center functionality are being replaced. Will be replaced over the next year. Would not be in a position to extend until completed.

Using public email for communicating case changes – Kaye Peters

Joe Krockner also asked about the privacy concerns and policy in using email to send information across the internet. ORC 1347 outlines what personal information is. County caseworkers should not solicit clients to submit personal information via email. Certified mail is an option to send information out.

Tim Constantine asked from a program side, is there policy around this as a way to send out information to the clients. The program policy says an application will be sent and via mail. Rick Copley said that sometimes it can be a Federal requirement and not just an IT issue to be resolved.

State instructions for the Certified Mail there are screen shots. The option to respond by Certified Mail is not automatic. Kaye Peters said that there are

caveats to the Certified Mail options. She explained that the Certified Mail is only available for a few days and if it is not opened in that time, the email will be deleted. Kaye will look into this further. Rick said that the counties need to check with their legal departments to make sure that this is allowable and that policy is in place. Tim Constantine said that he is working with the prosecutor's office on this issue.

Wanchick introduced John Pendergast as the client partner and asked him to bring this up at the next meeting he has with OFC so a discussion on this can occur.

Lynch asked if everyone is familiar with the Certified Mail. Wanchick said that a short demo can be done at the next OCATS meeting and it is in the TPOC session for a more details demo.

#### Child Care Program Updates –

DeanKepler - Will x and y fields continued to be available in the new ChildCare system. – Response from Sylvan Wilson: There is currently a Project within Business Intelligence area to move these data fields to the data warehouse.

#### John Pendergast: Over view of New ChildCare System

Portal tool for payments, contract agreements, banking, etc. Nearly 10,000 child care providers entered into the system to date. Many new cases have been processed. The first payments via state OAKS – FTP – entered into central – 70 invoices for \$78,000. Beginning this week, all counties will be able to use the system. Eligibility and Payment systems have identified a few bugs and we are working to fix them. We have received recommendations on enhancements and as time and resources permit, will look at enhancements.

As far as communications, with restrictions on travel for state and county staff, the program area is trying to take advantage of technology:

#### Webpage

[jfs.ohio.gov/cdcccids.shtml](http://jfs.ohio.gov/cdcccids.shtml) – where providers can go and get information on there account.

Video conference every other week – people are not happy with the length of the video conference, but this is a way to cut down on travel costs. Ravi shared the concerns he has heard from his county staff. He is asking for alternatives. John Pendergast will talk to Michelle Albast about possibly looking at restructuring to make it better for the counties.

On the opposition weeks, there are email blasts to the counties. The email blasts are responses to specific questions from the county. The counties may see the same type of information sent out, because the same question is being asked by the county in a multiple ways.

SIMS – will receive communication on what to change for that week.

WBT is a valuable tool and they are continuing to enhance it.

If there is a county that wants to go live sooner rather than later, Albast said to call her to see if they can be fit into the schedule. You can contact her through eGuide or GW. Currently doing around 4 counties. The schedule is being revised.

Tim Constantine – the project is providing a spreadsheet of the fees, etc., but he has questions about it and doesn't know who to contact. It resides on the Q:\ drive. Hogan said that he can always talk to Larry or JP and that is the best source of information. Tim would like to know when rates are effective; it would save them hours of work. He runs calculation based on rates, so he needs to have the date the rates are effective. Hogan wants to make sure the spreadsheets are the right ones that they are using.

A question was asked about the Control-D reports or BIC, - What data would be available to be pulled out. Bill said that preliminary talks are underway with Albast on what reports are needed and what needs to be integrated from the old system.

Wanchick said an update will be provided at the next OCATS. He said these might be good topics for the video conferences or through the email blasts.

Patrick Gaunt asked about getting data out of the system – x and z files (related to the first question). Kaye has the information electronically. Cuyahoga wanted to make sure these fields are available and could be moved to the data warehouse side.

Universal Security Profile –

CRIS-e Universal Profile – roll out date August 1. Will need to have collaboration between the CRIS-E help desk and LSC/TPOCs on who needs access. Wanchick asked that Rick Copley get with Pam Parks on this issue and review.

Warren Haydon asked for a short description of a Universal Profile. Sylvan said the universal profile will allow you to go beyond the boundaries of the county. Lynch commented this is valuable for case banking so teams can share information and for sharing across counties in the event of DR. Tim McCartney asked about working with bordering counties – funding structures over who does what. Wanchick said this is preliminary to remove technology barriers so the policy side can move forward.

TPOC Information Sessions – Kaye Peters,

Sessions are moving back to Sept/Oct to avoid peak vacation times during the summer. Please share ideas for topics with Kaye and Larry.

#### Nominations for OCATS – John Wanchick

Because we started OCATS based on recommendations on IT Strategic Planning to expand the good work of Metro IT group to a broader audience. Wanted to be inclusive, but knew that we couldn't have everyone from the state involved, so have representatives for the various entities and regions. Started out with one and two year terms. Kaye will work with you to sort out who is on what term limit. The nominations are open to current representatives if they would like to continue.

Balance of representatives – size, location, agency type

Once we know the population on what slots need filled, we will work with the Director's Associations on these nominations. Will be hearing from Kaye and Larry from this.

Tim Constantine asked about those who want to be co-chair. John said that we would look at it after the committee members are in place.

#### Update on CRIS-e Direct Data Base Access – Ruth James

Project born out of effort to address the screen scrapping by various counties. The idea was to provide near real time access to the data in CRIS-e. A sub-committee of OCATS looked at 50 items that the project would

Enterprise messaging system and implementation tools. At this time, ready to pilot this process with selected counties. When gather the data, counties can subscribe to it from three levels:

Near real time

FTP

Data Warehouse for accessing information

First effort will be the near real time and FTP. Today is the first meeting with the pilot counties.

Lynch explained that Trumbull, Hamilton and Cuyahoga will be the initial pilot testers. Networking access lists and firewall connections will be set-up so testing can start in the next few weeks..

The technical requirements will be addressed at today's meeting . Ruth will work with Larry on creations of county connections and communicating address assignments.

Meeting is in this room right after OCATS, and anyone can join the meeting.

Data Access Sub-committee \_ James Matheke

Next step was to schedule meeting on mash-ups. Access structured and unstructured data. Meeting scheduled this afternoon as well from 1:30 – 3:30 in room A-119. At the next OCATS, will provide update on the presentation. Discussion will occur after the presentation. Can hold 25-30 people if others would like to join the presentation.

Video – social media today

Break -

Hamilton County Presentation on Social Media – Brian Frondorf and Mike Boehmer.

Brian Frondorf – HCJFS started social media in 2007 and have continued to grow it since then. Facebook just passed up Google on searching on the internet. Facebook has 5.1 G per minute. HCJFS started seeing hand held out and using them. Noticed this and started working on this technology to communicate with clients. Noticing increases each time have social media launch on the

Mike Boehmer – takes a lot of team work between IT and Communication to get this done.

830 employees at JFS. Half of employees have been laid off or retired in last two years. Record levels of people coming through the doors. (see slides).

Social Media goals – being more accessible and caring as well as transparent. Get conversations going. Taking burden off telephone lines and waiting rooms. Build relationships with clients and key influencers. Want to dialogue – two way communications with clients.

Quote from Atlanta Newspaper – Social media networks provide cost effective ways for companies to put out their message and provide information to people in a personal one-on-one way”

### **Platforms –**

Public live chats – Bold Chat.

Cut and paste content to web page. Have control over it.

Mike Boehmer and a program expert sit and answer the questions

85 views the first day to see questions and answers. After a week or two, views increase to over 300.

Private chats – talk one-on-one with clients (30) chats a day.

Income maintenance (over 150 chats a day). Child Care is just now being introduced. Clients like that they get feedback.

BoldChat is through a secure line – encrypted and behind the firewall. It is a hosted service that is SSL.

Facebook – dipped toes in water in January 2009. Have 140 people following. Try to put something of value on site each day. Have a Facebook group as well. Using this as an experiment and would recommend using page instead of group.

Staff resources – Mike Boehmer job is to monitor and work on the content. Mike Boehmer monitors throughout the day. Time that it takes to keep the data from being stale and current is minimal.

Interactive? - Yes, but rare that people comment. Have they had to remove a post? - Yes, get some political stuff, so delete it. Customer complaints are left and responses are provided. It shows that HCJFS is responsive and puts human face to it.

Twitter – June, 2008. If status update is placed on Facebook, a link is provided on twitter advising of update. Local media follow and retweet or resend what JFS does.

Director's Blog – word press.com (wordpress.org is more internal for the techies.) This humanizes the organization and the director can talk in a more personal tone.

Audio podcast – RSS feed is available. Initially had 20 listens a month, now gets 2000 hits a month. At top of web site so prominent.

You Tube – Started with Waiting room, Something for people to watch, now do other posts.

FAQ – helpful information.

Adoption and foster care use it to post information. Had a forum for child care providers – now has had 200 views. Another way for people to get information.

Blog Talk Radio – niche, but anyone can create radio station. Mike Played with it at home, then moved to office. Can do it from phone and PC. Will interview people that do the live chats and take info. Get 40 downloads a piece. Free tool to get the information to the clients.

Web Site – over 30,000 unique visitors to the web site. It is the home base and funnel for everything else. Wanted it to be interactive. Visits to the other pages have been driven up substantially.

RSS Feeds – can subscribe to updates. Get about 2000 visits to RSS site. Just takes a limited amount of time to do the updates.

Have received much PR (positive) because of this technology and responsiveness to clients. Bloggers are helping get word out about foster care and adoption.

What they've learned:

Daily maintenance

Time management

Patience – stay with it

Educating late adopters – people who don't know about Facebook. Fact sheet of basics.

To get started - Leverage personal networks – church, PR people.

Integrated with speaker's bureau, newsletter, web site, etc. One part of the communication mix. Keeping information up to date and fresh: Only about 30% of his job.

Measure it and keep up on who is using it to make improvements.

Be Strategic: Mission, Goals, Audience, messages, method / spokesperson, Timeline/content plan.

(see slides)

Audiences:

One audience that is engaged is former employees who retired or were laid off.

They are interacting with them in a positive way. Social service net is very strong as a result.

John Pendergast asked about Interaction with legal before posting?

Answer: No, they trust us. Brian Gregg, makes sure everyone on executive staff are aware of it and know what is going on. We would never get our information posted if we had to go through legal for all content. This is the same kind of information that would be shared like a mailing or flyer..

Rick Copley – asked about who puts the information out and how it is monitored.

Answer: It is central to the Communication office.

Question regarding comments (good or bad) from the public being posted,

Answer: yes, it is all out there. They may take it off, but will respond back to the individual.

Question: What if people post their CPI on the site?

Answer: Would take it off and make sure that they are aware that they shouldn't do that.

Blog chat is monitored and moderated so if information comes in, it is not posted live. If something inappropriate does come in, we try to educate the public on what is appropriate to post.

Breach of confidential information – Question: if someone posts their own information, would it be a breach? Tim McCartney – happens in face to face

presentations as well. Mentioned telephone calls too. People leave personal information all the time and we don't confirm this information...

Rick Copley – legalities over internet posts versus calls which are more limited exposure. Doesn't sound like it is happening a lot, but would be something from security standpoint that we need to consider.

Brian Fondorff – see people communicating – people want to use technology rather than sit in the lobby. Have put in proper safeguards. We do let people know it is public forum and to not put private information on the net. We want to protect our consumers.

Rick Copley – have to have dedicated resources so the content does not get stale. If it does, it reflects poorly on the organization. Have to have policy (Terms of Use) so that you are protecting the organization.

Looks like HCJFS has considered these things.

Brian Fondorff – credits Communications for being on this. Outside the security side, the agency wants to come across as human. They will sometimes allow posts to stay out there, especially when there are posts that retract previous comments and say... hey HCJFS **did** help us out.

News article on CNBC – copiers with hard drives – information contained – live and learn and make mistakes, but don't want to stagnate technology.. Would be open to security discussions.

Mike Boehmer – usage policy on site is a good idea.

Dan Howard (Clark co) – questions the record retention policy.

Brian Fondorff – content is not deleted and could be provided if needed. No formal policy on Facebook or Twitter. Haven't looked into this. Tim McCartney responded: in general this information would fall under newsletter, etc., Bold Chat documents everything. Dan Howard – does sound like you are giving out business method so it would be public record. Brian Fondorff – everything we do is a public record. Dan Howard – requirements for handling as a public record.

Pat Hogan – interested in the tangible vs. intangible value of this technology.

Mike Boehmer responded – Tangibles: taking the pressure off the call volumes. Tim McCartney – 45 minute wait on referral line in January. Instituted Bold Chat and as of yesterday, the wait time was none existent. Chats are happening in tandem – 19 or so people at the time. Have canned answers to questions. As a program person, take the information and see that the appropriate information is being shared and answers are improved. With case workers, they are gaining skills and taking the pressure off 55,000 people coming into the building.

Hogan – are they retiring media as a result of this technology? Brian Fondorff – taking the responsibility off email. Now it is posted and don't have to maintain

lists. Puts the responsibility back on the clients. Mike Boehmer – Have scaled back newsletters as a result.

Brain Fondorff – chat operators are handling multiple lines. Average call on-hold was 15 minutes, now with the chat, can get served in less time.

Rick Copley – Asked for examples of Twitter message.

Mike Boehmer – can put in hyperlinks. So promote things that are already there. Chats, Blog, events, Channel 9 call-in show for adoption, etc. Did a new adoption video and posted to youtube and sent through Twitter so people could link to video.

Formalized policy – existing communication policy. Responsibility lies with the PR team. Computer usage policy as well – agency related. Working on a social media policy. Getting calls with other counties asking for help.

Larry Lynch – the outreach of this new media goes beyond the county. Larry asked Brain Fondorff to share the story of a Soldier out of the country trying to get information about his child support. Brian – Was working on bold chat and wanted to test it at 10:30 at night. Set status as available. Got 4 calls immediately. Explained that he was with IT and simply testing. A Soldier in Iraq inquired about his child support status which was forwarded to child support staff and they took care of it.

Public chats will get child care or child support chats from other states. Most of the time people are desperate because they are at the end of their options.

Social Media – rate of change is profound – keep moving, adjusting and refining it.

Tonya Kahley – UPDATE ON WIKI SUB-Committee

Waiting for policy on Social Media to be finalized. Everything hosted or placed on the ODJFS network hinges on this policy.

When moving forward, we must adhere to standard practices (see slide for full list) Respect copyrights and trademarks, avoid advertisements and sponsorships and endorsements

Content Management: Establish a standard content development and process to release and retire content.

Personal User of Social Media: Employees have the right to participate in social media on their own time using their own resources, never create or post anything that could be embarrassing or be considered offensive.

ODJFS' policy on social media collaborative team( external affairs, chief inspector, information service, legal services)

Wanchick asked Larry to maintain a forum for wiki and see where it resides. (interested parties- Tim C., Pat Gaunt and Dan Howard)

Larry Lynch – collaborative interaction, monitoring and moderation

### Walk-Ons

Mike Heino – Geuaga JFS brought up the CCBS News Story about the copier issue – hard drives in copiers storing information. Joe Krockner – said in his agency they have two copiers with HD – removing it and shredding HD. Brian Fondorff said – HCJFS is shredding HD

What happens when it is leased equipment? Get the HD back and shred it. When changing contracts the HD stays with agency.

Rick Copley – maintenance vendor on contract. Most have processes and procedures defined. John W – What is ODJFS ? -> Rick Copley - send to salvage

James Matheke follow up from certified email question from Tim Constantine regarding incorrect information found on certified mail documentation. – Internal user on creating message. External users can only reply to certified email.

Wayne County (Deborah Watkins) – comes down to cost and customer service. They want it now and we don't have the budget to mail it out any more. Why it is important to use technology – email. JW – cost of law suit would exceed any mailing costs. Wayne County (Deborah Watkins)– message is not coming out JW – we need to get that message out. It puts both state and county at risk. Amy Ruppert – Director's Conferences – are advising that this is way to get the information out. Larry Lynch says ODJFS is on the agenda for GW tips and tricks. John W – suggested including emails Security. Certified Mail

Wayne County (Deborah Watkins)– what is confidential information?

Rick Copley – email is a convenience, sometimes end users/receivers are not as technologically savvy to use it appropriately.

Darren Warren Trumbull co – client access their account for online and contact the department through the account in a secure environment....

John Wanchick – self-service update. Limited funding, so limited progress, but can give update.

Tim McCartney – There is a ton of confidential information going back and forth over fax, telephones, etc., and there is no understanding as to who is who and confirming that identity is hard to do. Don't want to have to finger print people as they come into the agency.

Rick Copley – need to look at how we want our own data handled.... ORC 1347 and Oaks data breach.

Wayne County (Deborah Watkins)– automation has to be at the forefront. The time is now. Lack of funding is not an excuse. When we hear this, it demoralizes staff... this will help the staff and the clients.

John Wanchick – we can't do everything. What is the one direction we need to move in? We needed to do these two years ago, and if the scope is so large, it will take 2-3 years to development.... Is feeling like a marathon.

Warren Haydon – email, public records, etc.... C:\ drive versus P:\ drive.... Why can't the state move email to P:\Drive in automated fashion so it is not lost or intentionally deleted. John W – email retention is a huge issue for the department. Policy based vs. automation Topic for future meetings. Larry Lynch – P:\ drive servers do not have the capacity. John W – we need to say that they get x amount of space and police it locally. We are storing things that are not public record or business related. This is why it is important.

Brian Fondorff – 95% of email is spam. John W –feels we have been good at keeping spam out, but need to address this issue.