Meeting Minutes

Meeting Name: RRD Session on Assign, Transfer and Approve

Place: State Office Tower, 30 East Broad Street, Room 2925

Date: July 20, 2004

Time: 8:30am – 4:30pm

Participants:

Althea Walker	Barbara Pearson-Jones (Scribe)
Barbara Wright	Cathy Appel
Christopher Cabot	Jack South
Jaida Patterson	Kathy Taylert
Krista Voltolini	Linda Ferguson
MaryJane Johnson	Ravi Nalanagula
Reva Weekley	Rose Moore
Sherry Edwards	Veronica Halloway

Observers:

Daryl Dunlap	Greg Hollifield
Karen Pluta	

Summary of Meeting Points

Review Action Items from Previous Meetings

1. The group was advised that going forward, use cases referring to "Automated" in the title, will now have "Process" included (Example – Use Case #234 Automated Alert will now be Process Automated Alerts. This is to conform to Use Case Standards and does not affect the work flow.

Use Case 234 – Process Automated Alert

The team discussed and agreed that the scenarios for adding, modifying and deleting (deactivating) alerts needed to be added to this use case.

The team discussed and agreed that the “Originator” would be the person who entered the information into the system and “Source” would be the person who reported the information.

Cathy Appel initiated a discussion regarding the possible need for the ability to “delete” items from the system as with an error entered and saved to a case file. Can this be done so that the erroneous information does appear in the case history while viewing it?
Example: A dangerous situation is reported. The Authorized user enters the Alert to the wrong case file and completes a save prior to correcting the error. The Alert is now attached to the wrong case file history and will appear when the case is reviewed.
The group agreed that this would need to be placed in the Parking Lot for further research and review.

Use Case 69 – Maintain Worker Assignments

The way the notification of a new work assignment will be issued to the worker was discussed. During this discussion, a question as to how the notification would be made brought the suggestion of an email issuance as well as a desktop notification – similar to a tickler. The question was raised whether the system would have the ability to notify a worker of a new assignment upon system log-in similar to the Group Wise system with a desktop notification.

Transferring of cases within a county was noted and needing to be discussed. (Re-assignment) – this was addressed by adding a step specifying the assigning/re-assigning of work-items.

The group discussed the need for possible “peer-to-peer” assignments. It was agreed that in the Assignment Screen, a list would show of all workers/supervisors that can be assigned work–items. It was also agreed that “peer-to-peer” assignments would be dictated by role and security profile of the user.

Use Case 137 – Transfer Case

The group discussed whether the case should be closed in the transferring county and then reopened in the new county once the transfer process was completed. The group consensus was that with this new system closing a case by the transferring county should not be necessary as the case history would follow the case.

It was discussed and agreed that the functionality described in this use case could accomplish transfers of both open and closed cases.

Use Case 256 – Routing and Approvals

It was discussed and the team agreed that there should be a status change to "pending approval" once the work item is routed, and from pending to "approved" or "not approved" when the Supervisor makes this determination.

As the Supervisor may select "not approved," an alternate scenario to the work flow for this process was created. It is noted as "For Scenario 2" in the Alternate Scenarios. All team members reviewed this additional scenario and approved the work flow.

Use Case 70 – View History of Workers for a Case

This use case was reviewed by the team. There were no questions or issues with this use case .

Action Items

1. Linda Ferguson advised the group that she would clarify the example of a notification in the Ohio SRD (Intake) which states: "The system must notify supervisor and worker that a recorded referral has been screened in with a Priority status and initiation time frame has elapsed (e.g. 1 hr face-to-face or 24 hour initiation)" How does Team 1 see this as being captured?
2. When discussing Security the definition of Authorized User may be re-addressed for clarification.

Parking Lot

There were no items.

Issues

1. Should there be an ability to delete information from the system (examples: data entry errors – incorrect name in a case specific alert) so the information does not show in a historical view. This would be across the system. (Use Case 234 Process Automated Alerts)
2. Will Private agencies have access to the system? (Use Case 69 Maintain Worker Assignments)