OPS CHAPTER 13 – Data Entry Requiring a SUN User

13.1   DUPLICATE OFFENDER RECORDS- MERGING IN CIS

1 – Be sure the records are actually the same offender – check LEDS by running the CCH records and check EPR if both records have SID #'s.

2 – It is recommended that you move the offender record that will ultimately be purged off the active PPO caseload. This will ensure that data is not being added to the "bad" record while you're moving data to the "good" record.

3 – DOC policy has been to **copy** all CIS (OPS/ISIS) data from the newer record to the oldest record, so that historical data is not lost (except as noted under 'Special Note' on page 2). **NEVER DELETE DATA FROM THE RECORD BEING COPIED!**

4 – Open the record to be copied (newest record) and print all the screens in the admission process which contain data. Don't forget sub screens, such as W/W Offenses, Notifiers, Detainers, etc.

5 – If a new custody cycle needs to be opened on the older record, please process the admission, but **DO NOT copy the offense data**. Go on to Step #6. If multiple cycles are required or a cycle needs to be inserted, skip this step and go directly to Step #6.

6 – Contact the DOC Help Desk HELPDESK@doc.state.or.us or call (1-866) 531-9600 and ask for a ticket to CCSUN. Provide them with the offender names and SID numbers for both records and specify which record is being merged and purged. CCSUN has a new "Offender Merge Data" program which allows them to automatically merge the following data:
   ▪ All Offense data, including Inop data and F8 sentence notes.
   ▪ All Conditions – active and expired.
   ▪ Earned time data – for institution records.
   ▪ F7 Remarks from the Movement History Maintenance screen.

7 – CCSUN will contact you when Step #6 has been completed. You must then enter all other data from your screen prints to the older record.

8 – If the Court name on the newer record is different than the older record, change the "C" name to the new Court name.

9 – Contact your Supervision fee person and have them copy fee account data to the older record.

10 – Update any other data you deem necessary.

11 – Re-entering ISIS data can be more difficult. PPO's may use different programs in ISIS depending on individual County policy. Print all the screens in the programs used by your PPO and either support staff or the PPO will have to re-enter the data onto the older record. This may include all or some of the following:

    1 – W/W Treatment Programs and W/W UA Log
    2 – W/W Supervision Fees
    3 – W/W Structured Sanctions
    4 – W/W Risk Assessments & Reassessments
    5 – W/W Sex Offender Assessments
    6 – W/W Warrant Requests by Offender or PO
    7 – W/W County Inmate Status
    8 – W/W Sanction Movements
    9 – W/W Release Plans by Location, Caseload, or Offender
   10 – W/W Supervisor Warrant Review
   11 – W/W Supervisor SRF Review

NOTE: You will not need to worry about the chrono history as the OISC Super User will automatically transfer all chronos when the duplicate record is purged.

12 – When all the re-entry of data has been completed, contact the Super User assigned to your ticket and tell them you are ready to complete the merge/purge process. CCSUN will verify the request and re-assign to the OISC Super User, requesting that the record be purged & chrono's merged. The Requester will be notified when this has been completed. You will then be able to change the record to the correct SID # if necessary.

You won't have to do anything with the EPR record unless you determine that the SID # it has been entered under is incorrect. In that case, you should modify the EPR record in WebLEDS with the valid SID #.

SPECIAL NOTE: In cases where the oldest record has data which predates 11/89, data integrity might be better served by making sentence notes and movement history remarks on the newest record, rather than transferring all the data to the older record. We would only suggest this alternative if the older case is REALLY OLD and has minimal usable data. If you choose to handle the merge in this way, please be sure to make as detailed sentence notes as possible on the new record. And remember: DO NOT DELETE data from the old record. When in doubt about merging from old to new or new to old, please contact the Super User before completing Steps #4 and #5.

The OISC Super User will also be informing Central Records when records are being merged, as we are unable to purge any record without informing them first.

13.2 COMPACT CASE - REOPEN (RCOM) IN CIS

This process is used only when a Compact offender has already been supervised on the docket numbers. It is not to be used for multiple investigations on new docket numbers.

13.2.1 USER STEPS: *PRINT THE MOVEMENT HISTORY SCREEN.*

Step 1 – Undo the last release by putting cursor on the last housing line, press 'F18=change data (Shift F6)', tab down to 'stop date/time' field and remove the date and time using the space bar or the field exit key, press enter to process, you will receive message 'date deleted. Next, caseload history'. **(DO NOT USE THE F14-DELETE KEY).**

```
SYS402I              Corrections Information Systems          10:01:43
 MCCARTHY              Movement History/Maintenance              9/22/05
  RECORD KEY:  0269799                              **Remarks**
  Offender.... 14388752 WAGNER, JUDY JO             Curr cycle. 01-01-02
  Status...... Discharge      Location.... MTGR     Primary caseload *None
  Position custody/admission cycle...  1  1
   --Cycle-- Location      --Admission----- ------Release-----------
  01 Admission From: NV    08/08/2001       08/08/2002    COMP
  01-01      Status: PR    08/08/2001       08/08/2002      COMP
  01-01-01   MTNO      08/08/2001 07:39 10/04/2001 09:26 TRAN MTGR
  Housing              08/08/2001 07:39 10/04/2001 09:26
  01-01-02   MTGR      10/04/2001 09:26 08/08/2002 11:11 COMP
  Housing              10/04/2001 09:26 08/08/2002 11:11


                                                        Bottom
   F3=Exit   F6=Insert housing  F7=Remarks  F10=Print  F16=Caseload history
   F18=Change data   F20=W/W Movements   F21=Auto cycle/summary maintenance
```

```
SYS403I              Corrections Information Systems          10:06:03
 MCCARTHY               Maintain Movement Data                   9/22/05
                                            CHANGE
 Offender.. 14388752 WAGNER, JUDY JO
 Location... MTGR  Multnomah Gresham Office

 Housing location........ MTGR  Multnomah Gresham Office

 Start date/time......... 10/04/2001  9:26

 Cell number............
 Outcount reason/loca....

 Stop date/time.......... 8/08/2002 11:11




  F3=Exit      F4=Prompt    F5=Refresh    F6=Create
  F11=Menu bar    F12=Cancel    F14=Delete
```

```
SYS403I               Corrections Information Systems        10:08:23
 MCCARTHY                  Maintain Movement Data               9/22/05
                                                     CHANGE
 Offender..  14388752 WAGNER, JUDY JO
 Location... MTGR  Multnomah Gresham Office


 Housing location........ MTGR  Multnomah Gresham Office


 Start date/time......... 10/04/2001  9:26


 Cell number.............
 Outcount reason/loca....


 Stop date/time.........





 F3=Exit      F4=Prompt    F5=Refresh    F6=Create
 F11=Menu bar  F12=Cancel   F14=Delete
 Date deleted.  Next, caseload history.                        +
```

Step 2 – Go to 'W/W Caseload History by Offender' screen and make sure the exit date has been removed. If not, use Option 2=Edit, tab to the 'exit date field' and remove the date by using space bar to remove date; or on 'W/W Caseload History by Offender' screen, tab over to the exit date and use the space bar to remove date. Press enter to process changes, you will receive message 'record updated.'

```
CMS294I               Corrections Information Systems        10:11:34
 MCCARTHY              W/W Caseload History by Offender          9/22/05


 ID Number........ 14388752 Wagner, Judy Jo
 Location......... MTGR Multnomah Gresham Office
 Primary caseload.
 Enter option...
   2=Edit   4=Delete   5=Display
 Opt  Caseload  Loc   Entry Date  Exit Date      Status
                                             To create entry
      3003      MTGR  10/04/2001  8/08/2002     PR
      3466      MTNO   8/14/2001 10/04/2001     PR
      3400      MTNO   8/08/2001  8/14/2001     PR








                                                      Bottom
 F3=Exit      F5=Refresh   F6=Create   F10=Print   F11=Menu
 F12=Cancel   F15=Secondary caseloads
 Check caseload history.
```

```
CMS294I                 Corrections Information Systems           10:14:40
 MCCARTHY               W/W Caseload History by Offender            9/22/05

 ID Number........ 14388752 Wagner, Judy Jo
 Location......... MTGR Multnomah Gresham Office
 Primary caseload. 3003  BEHRMAN, KERRIE
 Enter option...
   2=Edit   4=Delete   5=Display
 Opt  Caseload  Loc   Entry Date  Exit Date     Status
                                            To create entry
      3003      MTGR  10/04/2001                 PR
      3466      MTNO   8/14/2001  10/04/2001     PR
      3400      MTNO   8/08/2001   8/14/2001     PR




                                                        Bottom
  F3=Exit      F5=Refresh    F6=Create   F10=Print   F11=Menu
  F12=Cancel   F15=Secondary caseloads
  3003 record updated.
```

Step 3 – Transfer offender to RCOM using the original closure date.

```
 OPS270I                 Corrections Information Systems          10:18:02
  MCCARTHY                    Offender Release                     9/22/05
                                                       PROCESS

  Offender........... 14388752 WAGNER, JUDY JO
  DOB................  4/12/1975     Location: MTGR
  Status............. PR Probation
  Current caseload.... 3003  BEHRMAN, KERRIE
  Custody/Supv level.. MED

  Release date........ 08082002    Time.... 1020
  Release type code... TRAN

  Release to location. RCOM



  F3=Exit       F4=Prompt      F5=Refresh       F7=Current date/time
  F9=Retrieve   F11=Menu bar   F12=Cancel
```

Step 4 –E-mail the Help Desk with a request for a SUN ticket for an offender that needs to be reopened from Compact (include offender name and date offender was returned). Be sure to include your e-mail address and phone number so the SUN user will be able to contact you. SUN will do the following steps.

13.2.2 SUN STEPS:

Step 1 – Admit using RCOM as 'LOC' and 6000 as 'Caseload #' as of the transfer date.

Step 2 – Transfer back to field office location using date they re-accepted the supervision.

Step 3 – The SUN user will e-mail or call you advising you that you can now admit the offender to your office.

13.2.3 USER STEPS

Step 1 - Admit the offender using same date as the transfer (re-acceptance) and update the work with offense lines as needed. Make sure the Primary Caseload Screen has updated correctly.

```
OPS225I                  Corrections Information Systems            10:23:28
 MCCARTHY                  Community Corrections Admission             9/22/05


 Offender.............. 14388752 WAGNER, JUDY JO
 DOB...................  4/12/1975
 Current status........ Probation
 Last location........ RCOM
 Release date/time..... 10/20/2004 10:25
 Supervision level..... MED

 Admission to location. MTGR Community Corrections
 Admission date/time... 10202004 1026
 Caseload.............. 3009

 Post admission status. PR Probation

 LC conviction county..
 LC supv status code...
 Copy PSI data from....          SIDNO 00000000


 F3=Exit   F4=Prompt    F5=Refresh   F6=New admission
 F7=Current date/time    F9=Retrieve  F11=Menu bar        F12=Cancel
```

```
CMS294I                  Corrections Information Systems            10:25:01
 MCCARTHY                 W/W Caseload History by Offender            9/22/05


 ID Number....... 14388752 Wagner, Judy Jo
 Location........ MTGR Multnomah Gresham Office
 Primary caseload. 3009
 Enter option...
   2=Edit   4=Delete   5=Display
 Opt  Caseload  Loc   Entry Date  Exit Date      Status
                                             To create entry
      3009      MTGR  10/20/2004                 PR
      6000      RCOM  10/20/2004  10/20/2004     PR
      3003      MTGR  10/04/2001   8/08/2002  *  PR
      3466      MTNO   8/14/2001  10/04/2001     PR
      3400      MTNO   8/08/2001   8/14/2001     PR




                                                    Bottom
 F3=Exit      F5=Refresh   F6=Create   F10=Print   F11=Menu
 F12=Cancel   F15=Secondary caseloads
```

Step 2 – Go to WebLEDS to enter EPR if appropriate.

Step 3 – Contact your supervision fee person to review account.

13.3   BENCH (BNPB) CLOSURE REOPEN

This process is used for returning an offender to active supervision when the body and docket were released to BNPB and who will now be supervised on the same docket number.

13.3.1 USER STEPS:

PRINT THE MOVEMENT/HISTORY SCREEN.

Step1 – Undo the last release by putting cursor on the last housing line.

```
SYS402I           Corrections Information Systems          10:53:00
 MCCARTHY               Movement History/Maintenance               8/29/05
  RECORD KEY:  0234607                              **Remarks**
  Offender.... 12878352 FIELDS, GARY WESLEY         Curr cycle. 02-03-01
  Status...... Discharge        Location.... DOUG   Primary caseload *None
  Position custody/admission cycle... 2  3
   --Cycle-- Location       --Admission----- -------Release-----------
   02 Admission From: DOUG  02/06/2001       12/26/2003    BNPB
   02-03       Status: PR   12/27/2001       12/26/2003     BNPB
   02-03-01   DOUG          12/27/2001 08:00 12/26/2003 04:26 BNPB
   Housing                  12/27/2001 08:00 12/26/2003 04:26
   SANC             WKCR     01/30/2002 00:00 02/25/2002 00:00
   SANC             JAIL     04/13/2002 00:00 04/26/2002 00:00




                                                            Bottom
   F3=Exit   F6=Insert housing  F7=Remarks  F10=Print  F16=Caseload history
   F18=Change data   F20=W/W Movements   F21=Auto cycle/summary maintenance
```

Press F18 = Change data (Shift F6), tab down to 'stop date/time' field and remove the date and time, using the space bar or the field exit key, press enter. **(DO NOT USE THE F14-DELETE KEY).**

```
SYS403I           Corrections Information Systems (TEST)      10:57:06
 MCCARTHY                  Maintain Movement Data              8/29/05
                                                   CHANGE
 Offender.. 12878352 FIELDS, GARY WESLEY
 Location... DOUG  Douglas County Community Co

 Housing location........ DOUG  Douglas County Community Co

 Start date/time......... 12/27/2001  8:00

 Cell number............
 Outcount reason/loca....

 Stop date/time.......... 12/26/2003  4:26






  F3=Exit        F4=Prompt    F5=Refresh    F6=Create
 F11=Menu bar    F12=Cancel   F14=Delete
```

Step 2 – Go to 'W/W Caseload History by Offender' screen and make sure the exit date has been removed. If not, use Option 2=Edit, tab to the exit date field and remove the date, or tab over to the exit date and use the space bar to remove date. Press enter to process changes.

```
CMS294I              Corrections Information Systems (TEST)          11:02:11
 MCCARTHY               W/W Caseload History by Offender             8/29/05


 ID Number........ 12878352 Fields, Gary Wesley
 Location......... DOUG Douglas County Community Corrections
 Primary caseload. 7005  DANIELS, NEIL
 Enter option...
   2=Edit   4=Delete   5=Display
 Opt  Caseload  Loc   Entry Date  Exit Date     Status
                                              To create entry
      7005      DOUG   2/14/2003                  PR
      7017      DOUG   8/27/2002   2/14/2003      PO
      7016      DOUG   7/12/2002   8/27/2002      PO
      7008      DOUG  12/27/2001   7/12/2002      PO
      7008      DOUG  10/04/2001  12/27/2001      LV
      7011      DOUG  10/02/2001  10/04/2001      LV
      01507     SCCI   4/03/2001  10/02/2001      IN
      01599     SCCI   4/02/2001   4/03/2001      IN
      00599     SCI    3/28/2001   4/02/2001      IN
      01001     MCCF   2/16/2001   3/28/2001      IN
                                                         More...
  F3=Exit      F5=Refresh   F6=Create   F10=Print   F11=Menu
  F12=Cancel   F15=Secondary caseloads
```

Step 3 – Go to 'Offender Release' screen to transfer offender to BNPB on the date of original BNPB order.

```
OPS270I              Corrections Information Systems (TEST)          11:10:49
 MCCARTHY                      Offender Release                      8/29/05
                                                    PROCESS

 Offender............ 12878352 FIELDS, GARY WESLEY            * NOTIFIER *
 DOB................. 5/25/1972    Location: DOUG
 Status.............. PO Post Prison
 Current caseload.... 7005  DANIELS, NEIL
 Custody/Supv level.. LOW

 Release date........ 03072004    Time.... 1300
 Release type code... TRAN

 Release to location. BNPB




  F3=Exit      F4=Prompt      F5=Refresh      F7=Current date/time
  F9=Retrieve  F11=Menu bar   F12=Cancel
```

Step 4 – Call or E-mail the Help Desk advising them you have an offender that needs to be reopened from bench probation to formal probation or to Local Control status (include date offender was returned). Also don't forget to include your e-mail address and phone number so the SUN user will be able to contact you. The Help Desk will submit a ticket to SUN. Then SUN will do the following steps.

13.3.2 SUN STEPS:

Step 1 – Admit using BNPB as 'LOC' and 6050 as 'Caseload #'.

Step 2 – Transfer back to field location using date that offender was returned to formal probation or Local control, entering all pertinent data.

Step 3 – The SUN user will e-mail or call you advising you that you can now admit the offender to your office.

13.3.3 USER STEPS:

Step 1 – Admit the offender using same date as the transfer and update the work with offense lines as needed. Make sure the Primary Caseload Screen has updated correctly. If Local Control offender, admit to 'L' location.

```
OPS225I             Corrections Information Systems (TEST)          11:17:21
 MCCARTHY              Community Corrections Admission                8/29/05


 Offender............. 12878352 FIELDS, GARY WESLEY
 DOB..................  5/25/1972
 Current status........ Probation
 Last location........ BNPB
 Release date/time.....  8/24/2005  8:00
 Supervision level..... LOW

 Admission to location. DOUG Community Corrections
 Admission date/time...  8242005  800
 Caseload.............. 7001


 Post admission status. PR Probation


 LC conviction county..
 LC supv status code...
 Copy PSI data from....          SIDNO 00000000


 F3=Exit   F4=Prompt    F5=Refresh   F6=New admission
 F7=Current date/time    F9=Retrieve  F11=Menu bar      F12=Cancel
```

Step 2 – Go to WebLEDS to enter EPR.

Step 3 - Contact your supervision fee person to review account.

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