

OPS CHAPTER 23 – Employee Maintenance

23.1 STEPS TO EMPLOYEE MAINTENANCE CHANGES

NOTE: Don't forget to remove User ID's from active caseload numbers when that user is no longer responsible for a caseload. Any and all User ID's can be deleted from a caseload, but DO NOT DELETE THE CASELOAD NUMBER. Caseload numbers must remain on the system for the integrity of the historical data.

If a new caseload is created by mistake or with an incorrect number, contact the HELP DESK before adding User ID's or assigning offenders to the number and ask that it be deleted. The ticket can be assigned to Development or FAST.

Step 1 – From the Main Menu, type a '18=Employee Maintenance Changes' on the selection line, press enter. This will bring up the 'Work With Caseload Definitions' screen.

```

CCSUPPORT          Corrections Information Systems          14:20:03
MCCARTHY           CC Support Menu                        2/24/06
Select one of the following:

  13. W/W Sanctions
  14. Offender Remarks (old CF9)
  15. PSI Menu
  16. W/W Supervision Fees
  17. Kardex/Face Sheet Print Option
  18. Employee Maintenance Changes
  19. ID#/Caseload Maintenance
  20. W/W Red Tags
  21. W/W Housing History
  22. W/W Caseloads
  23. CC Reports Menu

  24. Office Calendar

                                     More...

Selection: 18                               Job:

F3=Exit   F4=Prompt   F10=Move to top   F11=Menu bar   F12=Previous menu
    
```

```

CMS100I           Corrections Information Systems (TEST)      12:25:09
MCCARTHY           Work with Caseload Definitions      10/16/07

Location . . . . . COMM Community Corrections
                  (Location or *ALL)          Position to . . . . .

Enter option...
  2=Change  3=Copy  4=Delete  5=Display  6=Discontinue

Opt Number Description                P/S
  6001  COMMUNITY CORR FAST TEAM      P
  6005  HOME FOR GOOD CASELOAD
  6010  MISC COMM CASELOAD            P
  6020  MCCARTHY, CHAR
  6025  LEDS TEST - HILDEBRANT

                                               Bottom
F3=Exit   F4=Prompt   F5=Refresh   F6=Create   F11=Menu bar   F12=Cancel
F13=Repeat
    
```

Step 2 – To Add a New Employee to Table: Press 'F6=Create', this will bring up the 'Caseload Definition' screen. Fill in:

- Caseload Number field with the new caseload number
- Description field with employee's name or per your county policy
- Caseload Type with a 'C' for community user
- Add/Change User ID's with users DOC400 User ID, phone number including area code and type (P=primary employee on caseload, S=secondary employee on caseload).

```

CMS101I                Corrections Information Systems                11:29:38
MCCARTHY                Caseload Definition                            2/14/06
                                CREATE

Location..... COMM
Caseload number..... 6020

Description..... MCCARTHY, CHAR
Caseload type..... C Community

Add/chg User IDs:
  MCCARTHY                503 7790302                P
Enter option...

Opt  User      Name                Phone Number Extn  P/S
-----
      No records found

F3=Exit  F4=Prompt  F5=Refresh                F11=Menu bar
F12=Cancel  F13=Repeat
    
```

Press enter, you will get message 'record added'.

```

CMS101I                Corrections Information Systems                11:33:19
MCCARTHY                Caseload Definition                            2/14/06
                                CHANGE

Location..... COMM
Caseload number..... 6020

Description..... MCCARTHY, CHAR
Caseload type..... C Community

Add/chg User IDs:
Enter option...

Opt  User      Name                Phone Number Extn  P/S
-----
      MCCARTHY  Char McCarthy        503-779-0302        P

                                Bottom
F3=Exit  F4=Prompt  F5=Refresh                F11=Menu bar
F12=Cancel  F13=Repeat
6020 record added.                +
    
```

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Press F12=Cancel to return to 'Work With Caseload Definition' screen. The employee's name you added will now appear on table.

```

CMS100I          Corrections Information Systems (TEST)          12:35:43
MCCARTHY          Work with Caseload Definitions                10/16/07

Location . . . . . COMM Community Corrections
                  (Location or *ALL)          Position to . . . . .

Enter option...
  2=Change  3=Copy  4=Delete  5=Display  6=Discontinue

Opt Number Description                P/S
  6001  COMMUNITY CORR FAST TEAM      P
  6005  HOME FOR GOOD CASELOAD        P
  6010  MISC COMM CASELOAD            P
  2  6020  MCCARTHY, CHAR              P
  6025  LEDS TEST - HILDEBRANT

                                                    Bottom
F3=Exit  F4=Prompt  F5=Refresh  F6=Create  F11=Menu bar  F12=Cancel
F13=Repeat
    
```

To Change an Existing Caseload Number, Description, Phone Number or Add a Secondary User: From the 'Work with Caseload Definitions' screen, tab to the 'opt' line beside the employee's record that needs to be changed. Put a '2=change' on 'opt' line and press enter.

```

CMS100I          Corrections Information Systems (TEST)          12:25:09
MCCARTHY          Work with Caseload Definitions                10/16/07

Location . . . . . COMM Community Corrections
                  (Location or *ALL)          Position to . . . . .

Enter option...
  2=Change  3=Copy  4=Delete  5=Display  6=Discontinue

Opt Number Description                P/S
  6001  COMMUNITY CORR FAST TEAM      P
  6005  HOME FOR GOOD CASELOAD        P
  6010  MISC COMM CASELOAD            P
  2  6020  MCCARTHY, CHAR              P
  6025  LEDS TEST - HILDEBRANT

                                                    Bottom
F3=Exit  F4=Prompt  F5=Refresh  F6=Create  F11=Menu bar  F12=Cancel
F13=Repeat
    
```

This will bring you to the 'Caseload Definition' screen. Tab to the area that needs updating/changing and make appropriate changes. Press enter to change record. First example is adding a secondary user; second example is changing phone number of exiting user; and third example is changing description of existing caseload number.

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Example 1:

```

CMS101I          Corrections Information Systems          11:55:39
MCCARTHY          Caseload Definition                    2/14/06
                                     CHANGE

Location..... COMM
Caseload number.... 6020

Description..... MCCARTHY, CHAR
Caseload type..... C Community

Add/chg User IDs:
  MORRISOJ
Enter option...
  4=Delete
Opt  User      Name      Phone Number Extn  P/S
    MCCARTHY   Char McCarthy  503-779-0302      P
                                     Bottom
F3=Exit  F4=Prompt  F5=Refresh          F11=Menu bar
F12=Cancel  F13=Repeat
  
```

Example 2:

```

CMS101I          Corrections Information Systems          11:59:48
MCCARTHY          Caseload Definition                    2/14/06
                                     CHANGE

Location..... COMM
Caseload number.... 6020

Description..... MCCARTHY, CHAR
Caseload type..... C Community

Add/chg User IDs:
  MCCARTHY
Enter option...
  4=Delete
Opt  User      Name      Phone Number Extn  P/S
    MCCARTHY   Char McCarthy  503-779-0302      P
    MORRISOJ   Judy Morrison   S
                                     Bottom
F3=Exit  F4=Prompt  F5=Refresh          F11=Menu bar
F12=Cancel  F13=Repeat
  
```

Example 3:

```

CMS101I          Corrections Information Systems          12:01:55
MCCARTHY          Caseload Definition                    2/14/06
                                     CHANGE

Location..... COMM
Caseload number.... 6020

Description..... MCCARTHY, CHARLENE
Caseload type..... C Community

Add/chg User IDs:

Enter option...
  4=Delete
Opt  User      Name      Phone Number Extn  P/S
    MCCARTHY   Char McCarthy  503-799-0302      P
    MORRISOJ   Judy Morrison   S
                                     Bottom
F3=Exit  F4=Prompt  F5=Refresh          F11=Menu bar
F12=Cancel  F13=Repeat
  
```

Step 3 – Press enter to return to ‘Work With Caseload Definition’ screen. Press ‘12=Cancel to return to Main Menu.

To Discontinue an Existing Caseload Number: From the 'Work With Caseload Definition' screen, tab to the 'opt' line beside the existing caseload number that needs to be discontinued, put a '6=discontinue' on the 'opt' line, press enter.

```

CMS100I                Corrections Information Systems                12:21:22
MCCARTHY                Work with Caseload Definitions                2/14/06

Location . . . . . COMM Community Corrections
                        (Location or *ALL)                Position to . . . . .

Enter option...
  2=Change  3=Copy  5=Display  6=Discontinue

Opt Number Description                P/S
  6001  COMMUNITY CORR FAST TEAM      P
  6005  HOME FOR GOOD CASELOAD        P
  6010  MISC COMM CASELOAD            P
  6  6020  MCCARTHY, CHAR              P

                                                Bottom
F3=Exit  F4=Prompt  F5=Refresh  F6=Create  F11=Menu bar  F12=Cancel
F13=Repeat
    
```

It changes the Description from the users name to Discontinued and automatically deletes all attached User ID's from the caseload number. Press 'F12= cancel to return to the Main Menu.

NOTE: The program did not always work this way. In the past, users had to use Option 2=Change and delete all attached User ID's when a caseload was 'Discontinued'. There may still be some old numbers that were discontinued prior to the new programming, so it is always a good idea to check your discontinued caseload numbers and make sure all User ID's have been deleted.

```

CMS100I                Corrections Information Systems                12:22:23
MCCARTHY                Work with Caseload Definitions                2/14/06

Location . . . . . COMM Community Corrections
                        (Location or *ALL)                Position to . . . . .

Enter option...
  2=Change  3=Copy  5=Display  6=Discontinue

Opt Number Description                P/S
  6001  COMMUNITY CORR FAST TEAM      P
  6005  HOME FOR GOOD CASELOAD        P
  6010  MISC COMM CASELOAD            P
  6020  DISCONTINUED

                                                Bottom
F3=Exit  F4=Prompt  F5=Refresh  F6=Create  F11=Menu bar  F12=Cancel
F13=Repeat
    
```

To change a Discontinued Caseload Number to an Active Caseload Number: From the 'Work With Caseload Definitions' screen, tab to the discontinued caseload number, enter a 2 on the 'opt' line, press enter.

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```

CMS100I          Corrections Information Systems          14:23:03
MCCARTHY          Work with Caseload Definitions          2/24/06

Location . . . . . COMM Community Corrections
                  (Location or *ALL)          Position to . . . . .

Enter option...
  2=Change  3=Copy  4=Delete  5=Display  6=Discontinue

Opt Number Description          P/S
  6001  COMMUNITY CORR FAST TEAM  P
  6005  HOME FOR GOOD CASELOAD    P
  6010  MISC COMM CASELOAD        P
  2  6020  DISCONTINUED

Bottom
F3=Exit  F4=Prompt  F5=Refresh  F6=Create  F11=Menu bar  F12=Cancel
F13=Repeat
    
```

This will take you to the 'Caseload Definition' screen.

```

CMS101I          Corrections Information Systems          14:25:19
MCCARTHY          Caseload Definition          2/24/06
                  CHANGE

Location..... COMM
Caseload number..... 6020

Description..... MCCARTHY, CHAR
Caseload type..... C Community

Add/chg User IDs:
  MCCARTHY          503 7990302          P
Enter option...
  4=Delete

Opt User          Name          Phone Number Extn  P/S

No records found

F3=Exit  F4=Prompt  F5=Refresh          F11=Menu bar
F12=Cancel  F13=Repeat
    
```

Fill in the Description field, Add/Chg User IDs field, phone number, and type. Press enter to process you will get message 'record updated'. This will bring the new information to that existing caseload number.

NOTE: If any old User ID's are attached, be sure to delete them before adding any new User ID's.

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```
CMS101I                Corrections Information Systems                14:26:41
MCCARTHY                Caseload Definition                        2/24/06
                                CHANGE

Location..... COMM
Caseload number..... 6020

Description..... MCCARTHY, CHAR
Caseload type..... C Community

Add/chg User IDs:

Enter option...
4=Delete

Opt  User      Name                Phone Number Extn  P/S
    MCCARTHY   Char McCarthy           503-799-0302      P

                                Bottom
F3=Exit  F4=Prompt  F5=Refresh                F11=Menu bar
F12=Cancel  F13=Repeat
6020 record updated.                +
```

Press enter to return to 'Work With Caseload Definition' screen. Press 'F12=cancel' to return to Main Menu.

23.2 PSI BPST (DPSST) MAINTENANCE

Step 1 – From the Main Menu, type a '15=PSI Menu' on the selection line, press enter. This will take you to the 'PSI Menu' screen.

```

CCSUPPORT          Corrections Information Systems          12:21:13
MCCARTHY           CC Support Menu                        3/01/06
Select one of the following:

 13. W/W Sanctions
 14. Offender Remarks (old CF9)
 15. PSI Menu
 16. W/W Supervision Fees
 17. Kardex/Face Sheet Print Option
 18. Employee Maintenance Changes
 19. ID#/Caseload Maintenance
 20. W/W Red Tags
 21. W/W Housing History
 22. W/W Caseloads
 23. CC Reports Menu

 24. Office Calendar

                                More...

Selection:15                               Job:

F3=Exit   F4=Prompt   F10=Move to top   F11=Menu bar   F12=Previous menu
    
```

```

3/01/06          DEPARTMENT OF CORRECTIONS          CD004I
12:28:23          PSI MENU

Select one of the following:

 1. PSI Referral
 2. PSI Assignment
 3. PSI Facesheet Entry
 4. Matrix Offenses
 5. Sentencing Guidelines Offenses
 6. PSI Summary/Print
 7. PSI Deletion
 8. PSI Inquiry
 9. BPST Maintenance
10. Change PSI Status

90. Signoff

Option: 9          PSI NO:          00

CF2-Previous Screen          CF6-Work with Printer Functions
    
```


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Step 2 – On the ‘PSI Menu’ screen, type a ‘9=BPST Maintenance’ on the selection line, press enter. This will bring up the ‘Employee Table Maintenance’ screen.

```

3/01/06          EMPLOYEE TABLE MAINTENANCE          TB202I
12:31:17

          Caseload#:
          or
          Last Name:
          or
          Location: MTEA

          Status:
                   blank - active only
                   A - active & discontinued

CF2-Previous Screen
    
```

Step 3 – Tab to the ‘location’ field, type in your county/office 4-digit code, press enter. This will bring up the ‘employee table by location’ screen.

```

3/01/06          OREGON DEPARTMENT OF CORRECTIONS          TB202I2
12:52:57          EMPLOYEE TABLE by LOCATION

          Location: MTEA

          BPST
          Name (last, first middle)  Number  Position  Caseload  Active
1  BORDEAUX, DAVE                   17537    PO         3368      Y
   BROWN, LINDA                     10606    PO         3302      Y
   CARROLL, KELLY C.                 11226    PO         3362      Y
   COLLARD, GREG                     11226    PO         3364      Y
   CONNERS, EVONNE J.                20781    PO         3382      Y
   DOCTOR, SUE                       90205    PO         3396      Y
   ELFVINGS, OLD CASELOAD#           13743    PO         3312      Y
   FRANK, PAUL                       10376    PO         3376      Y
   FULLER, JOANNE                    10376    FS         3305      Y
   GLYNN, RON                        10376    PO         3360      Y
   GURGURICH, ED                     10376    PO         3365      Y
   HARMON, RACHEL A                  10376    CL         3389      Y      +

Select - 1 or X          CF1-Menu          CF2-Previous Screen          CF8-Add Record
    
```

Step 4 – To Add a record, press CF8-Add Record (same as F8), this will bring up the ‘Add Employee Record’ table. Fill in the pertinent information for the employee you are adding as follows:

- Last Name: Employees Last Name
- First Name: Employees First Name
- Middle Name: Employees Middle Initial (no period) or full middle name

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- Position: FS – Field Supervisor; PO – Parole/Probation Officer; HO – Hearings Officer; CL – Support Staff; and AI – Aide
- Location: Your 4-digit county/office code
- Caseload: The 4-digit number assigned to that employee (if applicable)
- BPST (DPSST) Number: The DPSST number assigned to that employee (optional)

Press enter to add user, then press CF2-Previous Screen (same as F2) to return to 'Employee Table Location Screen'. Press F2 again to return to 'Employee Table Maintenance' and F2 again to return to Main Menu.

```
10:01:57          OREGON DEPARTMENT OF CORRECTIONS          TB202D5
 3/13/06          ADD EMPLOYEE RECORD

Name Last: MCCARTHY
      First: CHAR
      Middle: L

Position: CL
Location: MTEA
Caseload: 3301

BPST Number: 16810      (optional)

CF2-Previous Screen    CF6-Switch Middle & First name
                       CF7-Switch First & Last name
```

Step 5 - To Change an Employee's record, type a '1 or X' on line in front of name you wish to change, press enter. This will take you to the 'Change Employee Record' screen.

```
13:08:50          OREGON DEPARTMENT OF CORRECTIONS          TB202D4
 3/01/06          CHANGE EMPLOYEE RECORD

Name Last: BORDEAUX,
      First: DAVE
      Middle:

Position: PO
Location: MTEA
Caseload: 3368

Discontinued Date:
                  mmdyear

BPST Number: 17537

Effective Date: 00/00/0000      Update User:
                                Update Date: 00/00/0000

CF2-Previous Screen    CF6-Switch Middle & First name
                       CF7-Switch First & Last name
```

- To change caseload #, tab to the 'caseload' field and type in new caseload of employee.
- To switch middle & first name, use the CF6-Switch Middle & First Name function (same as F6).
- To switch first & last name, use the CF7-Switch First & Last Name function (same as F7). NOTE: Be consistent when entering names.
- To discontinue an employee, tab to the 'discontinue date' field, type in date employee was discontinued. This will remove employees name from the table's active list.
- To change or correct DPSST number, tab to the 'BPST Number' field and type new number.
- To change location of employee, the leaving county/office will discontinue employee and receiving county/office will enter the new employee on their table.

Press enter to update record. Press F2 (CF2-Previous Screen) to return to 'Employee Table By Location' screen and F2 again to return to 'Employee Table Maintenance' screen and F2 again to return to Main Menu.

To print list use the screen print button. If you have more than one page, you will need to screen print each page. To do so page down and press screen print on each page.

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