5/8/2014 Associate Meeting

Updates from previous meetings:

1. Electronic signatures
   Laura shared a chart identifying which staff from the list I sent her after the last meeting staff she has received a copy of their electronic signature, installed it on their computer and provided training on how to use to that staff person. There are only 2 that she still needs either a copy of their signature or for them to arrange time for the training.

2. Faxing from computers
   Laura's chart also identified the staff that have been set up to fax from their computers. All offices have at least someone who has been set up to fax from their computers. This was arranged for associates who do authorizations so they can fax authorizations from their computers.

3. Fax Confirmation.
   Vicki Webb asked if the copier will provide a confirmation once a fax has been sent as they have had trouble with providers indicating that they didn't get a fax. Melissa indicated that their copier has a log that she can access to confirm that the fax has been sent. Deb Ottemann said their copier man had to come out and program their copier to print out a confirmation page. Lyndel said their copier prints out a confirmation page automatically. Cheryl will talk to Laura and Tibor about how the copiers can provide this confirmation.

4. QE2 Training.
   One of the things that we identified that associates need

training on early was QE2. Wendy has developed a demo QE2 tutorial and help icon that she demonstrated for us. She explained that tutorial will be created for all the screens and processes in QE2 with a help icon. The help icon includes links to the checklists (if appropriate), Policy and Process Chapter, and forms. The committee felt that this was going to address the wish for training sooner on QE2.

5. First 30 day training checklist.
   From the list of training needs the first 30 days identified at last months meeting Cheryl shared the "How Do I get a Cup of Coffee Around Here?" document that is available on VRIS (Training Section – New Staff Mandatory Training) as it has several of the training topics we identified. The Coffee document is quite long and in no particular order. Committee members suggested that checklists could be developed that identified the things that an associate needed to know the first day, i.e. bathrooms, lunch times, breaks to things needed to know the first week, i.e. answering phones, copy machines, key to the office, how to lock up at night, to the first month. Melissa offered to work with Cyd to come up with some draft checklists for the next meeting.

6. VR Process training
   One of the topics identified that associates need training on within the first 30 days was the VR Process. Discussed that once the QE2 tutorials are completed they will also cover the VR Process and it was suggested that of all the QE2 tutorials created that a training checklist of the ones that pertain specifically the VR Process could be created and posted on the Training section on VRIS.

May Agenda:

1. VR Orientation video.
   Several questions were raised on use of the new Orientation video:
   - It is mandatory? Example – potential client came in for first meeting refused to watch the video saying he knew what VR was and he just wanted to meet with someone and apply for services.
   - How do we determine if potential applicant watched the video before coming to the first appointment?
   - If all the community computers are busy does the VR specialist show the video before they begin the Employment Discussion?
   - Should/could an associate give the potential applicant their iPad to view the video in the reception area where they would be within sight of the associate? Not comfortable giving our iPad to someone that would be out of our sight.
   - Can staff choose to use the old Orientation Flip Charts instead of the new Video?
   - Omaha Downtown has group orientations, how should they use the video?
   - Can Omaha Downtown and Omaha West get the Orientation video on DVD for the computer monitor in their reception area to show this video over and over?
   - Can associates assume that an individual has viewed the Orientation video when making the individual an applicant in QE2? **Answer**: Yes we can make this assumption and can identify the VR Specialist who met with the individual as the provider of the Orientation.

After some discussion on how to notify consumers to view the video on our external web site or the YouTube video before coming to the office the following were suggested:

- When taking a new referral ask for their email address and indicate that along with appointment confirmation there will be a link to our Orientation video for them to view before they come to the appointment. (Mail often takes 4 days now so mailing a confirmation letter may not be appropriate or possible.) Committee members will report back at the next Associate meeting on how this suggestion worked.
- If making the appointment for a potential applicant that doesn't have email indicate that when they arrive they will be viewing a short orientation video before meeting with a VR Specialist. Committee members will report back at the next Associate meeting on how this suggestion worked.
- For specialists who want to continue using the flip chart have them to use the video on their ipad instead.
- For the group orientations in Omaha have the trainers use the Orientation video instead of the old powerpoint. Potential clients can still ask questions after the video.

2. IPE approval Milestones

   Edna brought up the issue with the IPE Determination approval only creating the IPE Completed Waiting for Funding and Waiting for Services. When an authorization is done or when services start staff often forgot to move the Milestone to Services Initiated-VR Services and wondered if there was a way to automate this. Coincidently at the Program Directors meeting on Monday this topic was also discussed and since we are not in an Order of Selection

there is no reason that QE2 can't automatically create the Services Initiated-VR Services milestone at the time of IPE Approval. Cheryl has put this on the QE2 Change Committee and when the QE2 software update is completed this change will be made.

3. Dictation App
   Bea and Edna from GI asked what experience other teams have had using the Dictation app? Mel reported that Norfolk has several staff who are using it and really like it. Deb reported that one staff person in Kearney tried it and didn't like it but she wasn't sure how many times they tried it. Shirley also indicated that some Scottsbluff staff tired it but also didn't like it, but not sure how many times they tried it. Some issues associates reported about the dictation app are some staff are not very tech savy and so using this app isn't something they are interested in, also some staff may not be patient enough to train the app to their voice. Melissa is going to ask the staff in Norfolk for ideas/tips on how they got the app to work for them and report back at the next meeting.

4. Associate expectations of Specialists and Specialist expectations of Associates.
   During GI's associate meeting the topic of what are the expectations of associates and specialists and of each other. There are some specialists who are not comfortable with technology so write out their task notes for the associates to enter at one end of the spectrum while other specialists enter most of their own data. There are no hard and fast rules regarding expectations however, with staff being provided iPads and in some cases smart phones the expectation is that they will be using these tools for more

than just email and calendar.

5. Next 60 days training checklist.
   Grand Island submitted a list of topics for the next New Associate Training Checklist:
   - setting up/opening cases (in QE2)
   - setting up paper case files
   - requesting records
   - requesting BPQYs from SSA
   - filing
   - ins and outs (importance) of entering task notes
   - setting up services (maybe—this is probably more appropriate for the first 90 days or more)
   - authorizations
   - need standardized instructions/how-to's for certain tasks (for example, completing authorizations, entering a plan, etc.)

Next meeting:

1. Associates will report on using the new Orientation video and ways to help consumers view it before coming to the office or viewing it in the office.
2. Mel and Cyd will share the restructuring/reorganization of the Coffee checklist
3. Discuss the Next 60 days checklist and how the tutorials and help icon in QE2 might assist with this.