Associate Work Group Committee
4/10/2014 Minutes

1. Could the auth number also be put on the invoice when printing the invoice? Ex. When we are printing the invoice sheet for gas vouchers. (Sheri Bock)
   Response: Yes this can be done, however, not sure if it can be done now. We are currently in the process of updating the software that QE2 uses. This means that no "changes" to the programming will be made until the software update is complete. Fixes on cases can still be made but no changes to how QE2 works. Cheryl will talk with the programmer to see if adding the auth number to the invoice would fall into the category of "change" or "fix".

2. I would like to know more about what we are to be recording when we get the employment updates from Easter Seals. (Deb Ottemann)
Response: about 1-1½ years ago Pat Bracken sent out an email asking staff not to update the Employment Record on consumers that Easter Seals discovers has changed jobs, quit or received a raise or promotion. The reason is because if the consumer is receiving social security benefits at the time of closure Pat has to use the Employment Record information to submit to SSA for reimbursement. Unfortunately QE2 is not able to track the employment record as it was at successful outcome if it is changed later. This will require some additional programming that has not occurred yet. Until we are able to change QE2 staff should not update the Employment Record after successful outcome. If staff want to document something about the job change they should enter a task note until QE2 can be changed.

3. Calendaring Issues (Laura Stueck)

Laura provided information on some of the issues that she has discovered in managing the Master Calendar in Outlook. A separate attachment documents the information on using Outlook when setting up meetings.

4. Faxing from computers: (update from Tibor 3/18/2014)

Dan is making the rounds to all the offices, surveying and getting information on phone lines next to copy machines. I expect that within a month we'll have the copy machines fax-ready and can start training staff on how to do this.
Would it primarily be the Associates who would need to fax from computers? I understand they do a lot of auths, and such, whereas counselors and evaluators would not necessarily need to fax?

Tibor discussed with Elizabeth, and she said it wouldn't be too hard to add a signature to QE2 for authorizations, like we had in old Quest. He thought that staff (mainly associates) would like that very much, but that's something that should go through the Change Committee.
Response: GI shared that they have electronic signatures that were set up by someone on their team that they use to sign auths and email or fax to providers. Cheryl will talk with Tibor about their way to see if that can be used for others.
Omaha Downtown staff thought that Laurie Vendittee from Omaha West also had this capability but Deb Rozmariek was not able attend this meeting so not confirmed.
Others who would like this option:
Omaha: Vicki Webb, Jason Kussmann, Laurie Venditte (?)
Lincoln: Kay Parker, Patrice Jackson

Columbus: Sheri Bock, Nancy Blackburn
Fremont: Shawn Newill
Norfolk: Nancy Mackey, Kathy Bates, Mel Rakowsky, Cyd Hunt
South Sioux City: Deb Clayton
Kearney: Faylin Henricksen, Joleen Perry, Deb Ottemann
North Platte: Lyndel Johnson, Deb Crom
Scottsbluff: Shirley Smith, Crystie VanHausen

April Discussion items:

Training for New Associates – what's needed the first 30 days

Topics identified by the workgroup:

- Calendar use
- Referrals, how to take one, how to set one up in QE2
- Confidentiality
- Filing
- Phone
- Navigate all the computer programs
- The VR Process
- QE2

Suggest developing a checklist that is specific to associates.

Discussed how QE2 training might be delivered sooner:
Video conference Possibility

- 2-3 sessions in a 1-2 week period of time, example Monday-Wednesday-Friday, 2 hours each day. That way it gives staff time to do some of the things learned that day for the next session.

- Make it available to current staff as they may want/need a refresher and if the agenda was sent to all associates they could decide if they wanted to sit in on that topic.
- Consider recording the sessions and leave them up for 3 months at a time and then remove
- No new associates presently but consider doing a test of this idea with current associates and/or committee members

QE2 suggestions for change:

- For Office Directors – an alert when a case requires an exception. Currently they have to check QE2 or staff notify them that an exception needs to be made. This would be true for Program Directors who need to make exceptions too, nice to be notified by QE2 that one is there for them to make.
- When in a provider record looking at auths if the client's name could be a link that takes them directly into the client's record.

Cheryl will put these on the QE2 Change Committee wish list.

Next Meeting:

2. Associate training: what do they need to know within thenext 60 days?
3. What on-going training for associates do we need?