

**Seniors and People with Disabilities
and
Office of Mental Health and Addiction
Services**

**Action Request
Transmittal**

Cathy A. Cooper, Deputy Asst. Director, SPD and

Madeline Olson, Asst. Administrator, OMHAS

Authorized Signature

Number: SPD-AR-05-010

Issue Date: 03/07/2005

Topic: Systems Issues

Due Date: 3/31/05

Subject: eXPRS - User Training

Applies to (check all that apply):

- | | |
|--|---|
| <input type="checkbox"/> All DHS employees | <input type="checkbox"/> County Mental Health Directors |
| <input type="checkbox"/> Area Agencies on Aging | <input type="checkbox"/> Health Services |
| <input type="checkbox"/> Children, Adults and Families | <input type="checkbox"/> Seniors and People with Disabilities |
| <input type="checkbox"/> County DD Program Managers | <input checked="" type="checkbox"/> Other (please specify): Counties, service providers and DHS staff that will use eXPRS in July 2005. |

Action Required:

1. Select the employees in your organization that will use the Express Payment and Reporting System (eXPRS) to perform their duties beginning in July 2005. Discuss your expectations concerning the work they will perform using the eXPRS system. Share the contents of this correspondence with them, so they understand the training plan for all system users.
2. Send the following information about people you have selected to be trained in eXPRS to Cindy Steinkamp at Cindy.L.Steinkamp@state.or.us by **March 18th**:
 - a. Name
 - b. Title
 - c. Email address
 - d. Telephone number
 - e. If your agency will use hard copy forms for billing eXPRS, and require an alternative training plan, please include that information as well.

3. Research the system requirements of NetLink, the primary training forum, so that your staff will be able to participate effectively. This should be completed by April 1st.

Reason for Action:

In July 2005, DHS will begin making payment for the following services through eXPRS:

- ✓ Community Treatment and Supervision Services for Persons under the Jurisdiction of the Psychiatric Review Board – MHS 30
- ✓ Residential Facilities – DD 50
- ✓ Supported Living Services – DD 51
- ✓ Employment and Community Inclusion Services – DD 54
- ✓ State Operated Community Services – DD 141
- ✓ Adult Alcohol and Drug Residential Treatment – A&D 61
- ✓ Housing for Dependent Children Whose Parents are in Alcohol and Drug Residential Treatment – A&D 62
- ✓ Youth Alcohol and Drug Residential Treatment – A&D 71

WHO SHOULD BE TRAINED

The people who are most likely to use eXPRS are those with responsibility in areas such as contracting for services, requesting payment and performing accounting functions. For the Local Authority (CMHP) this would include people such as those who interact with DHS around intergovernmental agreement or direct contract, allocate funds to contract providers, authorize services for clients (in the case of DD services), make payments to providers and monitor providers. In provider organizations (including the CMHP for MHS 30) this would include people who interact with a Local Authority around contracts and funding levels, decide on the individuals to be served and the type and frequency of services clients will receive, request payment for services and perform accounting functions. About 2-4 people per organization are anticipated, depending on the size of the organization.

If your organization contracts for bookkeeping or accounting services, a representative of that firm may be enrolled as a user in eXPRS for your organization. If you elect to do this, the representative of that firm must receive training. The name and other information requested above for your employees should also be provided for this person, but please note the name of their employer after their title.

If you need more information about eXPRS and how it might affect your business practices, please refer to <http://www.dhs.state.or.us/policy/spd/transmit/ar/2005/ar05008.pdf>

USER TRAINING PLAN

DHS will sponsor training for all system users beginning in May 2005. The organization that will deliver the training is Total Training Solutions, Inc. TTS provides customized training for new and existing computer applications. They are experienced in delivering web-based training and have used systems like NetLink in previous work. You can learn more about them at <http://www.totaltrainingsolutions.com/>.

The overall training plan consists of the following components:

1. Access to an online Resource Manual
2. Group training provided in a two-hour session via NetLink during May 2005
3. Practice time using eXPRS in a test environment to become proficient in performing the functions needed for the job
4. A learning assessment to confirm proficiency
5. Individualized assistance and support in the form of telephone assistance (Help Desk), access to additional NetLink training sessions focused on problem areas, and onsite training
6. An updated Resource Manual and NetLink training will be offered in November 2005

RESOURCE MANUAL

The Resource Manual will be available online to all users. It contains many “hot links” for easy navigation. It is organized around the three primary user groups: State, Local Authority and Provider. Each of the user groups will tend to use some functions more than others, so the Resource Manual provides a separate curriculum map for each user group. The Manual provides step-by-step instructions, with extensive use of screen shots, to guide users through the eXPRS functions and procedures. Practice exercises for each user group are also included. Sections of the Manual can be printed in a PDF format.

GROUP TRAINING

Group training will consist of a two-hour session using NetLink. NetLink is the DHS system used to deliver live interactive training to participants via the Internet. It will allow people to participate in the training from their own office and workstation.

You should check on system requirements at <http://www.dhs.state.or.us/training/tools/netlink.htm> so you and your staff can make effective use of the training. This should be done well in advance of the training. There will not be sufficient time for this on the day of the training. Training sessions that are missed because of technical difficulties could become difficult to reschedule, as we move through May and there are fewer date options.

Training sessions will be organized by user group (State, Local Authority and Provider). The group size will be limited to 30 people. The date and time of these sessions will be sent to you in late March, along with instructions for registering in a

training session. These instructions will be sent to you and to the people you have identified for training, as requested above.

PRACTICE TIME

After participation in a training session, users will be offered a week to practice the functions they will need to perform in a version of eXPRS that operates in a test environment. It will not contain real clients or dollar amounts and will have no impact on your business. A temporary user name and password will be assigned.

The purpose of the practice sessions is for users to gain proficiency in functions that they will use to perform in their work. Users may request assistance during the practice period through a Help Desk telephone number that will be provided.

LEARNING ASSESSMENT AND SUPPORT

After the practice period, users will log into the website operated by Total Training Solutions and complete an assessment exercise. The assessment will confirm the users' proficiency in performing functions that are required for their job. Assistance will be offered those who need it. The assistance could include telephone consultation, participation in additional NetLink training focused on problem areas or onsite training and technical assistance. This kind of assistance will be available, where needed, before July and continue through September.

People who have mastered the functions needed to perform their duties will be enrolled in eXPRS.

UPDATED MANUAL AND TRAINING

Experience with the system over the summer will identify the inevitable glitches. These will be fixed in the system, along with updated manual and training materials, by late October. An updated Manual and NetLink Training will be offered in late October or early November. One of the training sessions for each user group will be edited and made available on a CD for each organization, according to their user group. The CD will assist in user organizations in training new employees. Eventually an online tutorial will be developed.

NEXT STEPS

- A field test involving six counties is scheduled for the latter half of March. The Manual and training will be updated based on that experience.
- At the end of March, training instructions will be sent to all those who have been identified for training. The instruction material will include the training dates that are available and the registration procedures.
- Registration for training will occur on a first come basis. All training sessions will be scheduled during the month of May.

Field/Stakeholder review: Yes No

If yes, reviewed by:

If you have any questions about this action request, contact:

Contact(s):	Jack Morgan - Overall plan, DD Services, DHS staff Bob Miller - Mental Health and Addiction Services		
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