

## SSIS Template and Document Redesign

SSIS Versions 5.3 and 5.5

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### Background

- SSIS Version 5.3 will prepare you to convert custom templates. Workers will still be able to use the templates in their current state in Version 5.3 while conversion related work is taking place. There will be two template editors.
- SSIS Version 5.5 will have redesigned
  - Templates
  - Documents
  - Service plans
  - Case Notes

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### Questions

1. Why redesign templates and documents?
2. What are the opportunities?
3. How do things work now?
4. How will things work?
5. What are the implications to agency workers?
6. What is the schedule?

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## Why Redesign Templates And Documents?

1. Federal SACWIS review findings require it.
2. SSIS development platform (Architecture) update requires it.

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## ACF SACWIS Review Findings

- Recommendation:  
Minnesota must develop a plan to ensure that data entered on templates, such as court reports and case plans, is consistent with discrete data fields in SSIS.

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## What the SACWIS Review Findings Mean

- Social workers can no longer type over data in SSIS documents when the data originates in the SSIS database, such as:
  - Names
  - Addresses
  - Phone numbers
  - Social worker name/title

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## Questions

1. Why redesign templates and documents?
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## What Are The Opportunities?

- Make service plans and documents work in a consistent manner
- Create a data cleanup function for documents that is easy and practical to use
- Expand the list of merge fields and standardize their use
- Use industry-standard technology for document templates and documents

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## Make Service Plans And Documents Work In A Consistent Manner

- Data set-up is different between service plans and documents
- Editor operates differently between service plans and documents
- Lists of merge fields are different between service plans and documents

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### Create A Data Cleanup Function For Documents That Is Easy And Practical To Use

- Documents do not show missing information or errors
- Out-of-Home Placement Plan shows errors
  - Only when first created
  - Can print the grid of errors, but cannot navigate to correct data
- No other plans show errors

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### Standardize The Use And Expand The List Of Merge Fields

- Merge fields are used inconsistently
  - For instance, the author field can appear in several places, as both author and social worker
  - Unless the author was never assigned as a worker in the workgroup
    - In that case, social worker is the first primary worker found (which may be a previous primary worker)
    - But, the author remains as the value the worker picked
- Clear?

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### Standardize The Use And Expand The List Of Merge Fields (Cont.)

- Merge fields will no longer be picked randomly by the system; workers will be able to pick them
- For example, the address used on service plans is picked randomly by the system
- Address on documents may be picked by the user
- Other merge fields are also picked randomly
  - phone number, school, etc.

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## Use Industry-standard Technology For Document Templates - HTML

- HTML is an industry-standard scripting language
- It is used to describe forms and data to be displayed in a web browser

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## Document History in SSIS

- Documents and mail merge were SSIS Phase 1 – (1997)
- Many developers have since “contributed” very good ideas
- We now have documents and templates full of “good ideas”



(or a strange brew)

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## Current Document Template Features

- State- and county-created templates
- All common font functions – font selection, bold, underline, etc.
- Merge fields
- Tables
- Check boxes, dates
- Hyperlinks
- Spell check

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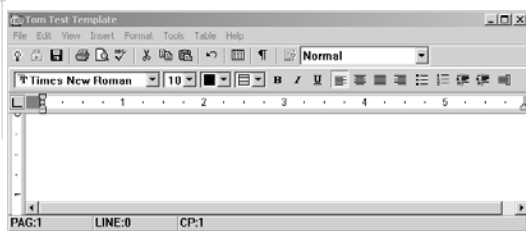
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## Existing Template Editor



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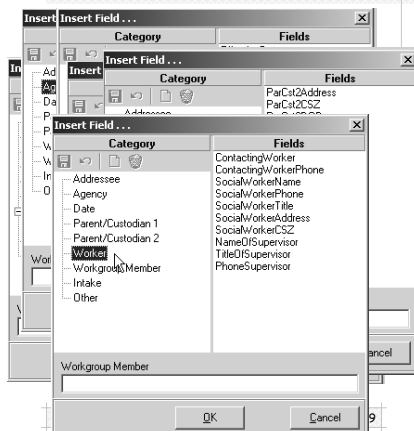
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## Adding Database Fields to a Template



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## Current Document Setup

Document: New

Bear Yancy SR 39679090 Bear Yolanda CP Assessment 01/14/2005

Author: SSIS/DHS ZZ-Help Desk

Professional Title:

Date: 08/11/2009 02:48 PM

Document Category:

Document Name:

Comments/description:

Document Information:

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## Current Document Setup

Document: New

Bear Yancy SR 39679090 Bear Yolanda CP Assessment 01/14/2005

Author: SSIS/DHS ZZ-Help Desk

Professional Title: Supervisor

Date:

Document Category:

Document Name:

Comments/description:

Document Information:

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## Current Document Setup

SSIS Administration 5.3.0.13 - [User Search]

File Lists Create Tools Window Help

Name Employee Type County Email

SSIS/DHS ZZ-Help Desk S State employee Social Serv

SSIS/DHS ZZ-Help Desk Program restrictions Despe

Identification

Prefix:

First: SSIS/DHS

Middle:

Last: ZZ-Help Desk

Suffix:

Title: ZZ-Help Desk

E-mail:

Phone: (651)772-5555

We don't use title from the Staff setup screen

...unless you're a supervisor

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## Current Document Setup

Highlighted – what does this mean?

Dad does nothing...

Documents: New

Case 18693823: George Intake 3AS Intake 02/02/2009

Author: SSIS/DMS 22 Help Desk

Professional Title:

Date: 06/13/2009 01:53 PM

Document Category: Other

Document Name: Tom Test 38

Comments/Description:

Document Information:

Child: Dad does nothing...

Mother/Custodian1:

Father/Custodian2: Dad M. Jones II

Open Document Cancel

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## Frankenstein



- With some work in the set-up screens, you can mix a street from one address with the city, state, and zip from another address
- You can pick a title that's not entered on a person – for some people under some circumstances

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## Current Direct Entry of Missing Data

- You can enter an address directly in the drop-down on the Setup screen, although it doesn't save back to the database
- There may be other similar situations
- You can enter anything anywhere in a document, changing any data from the database

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## Current Data Correction

- Only OHPP offers any data correction

Missing AutoFill Information

Some auto-fill fields in this document will not be filled in because the corresponding information has not been entered.

You can create the document now with the missing information, or return to the workgroup and enter the missing information.

If you enter missing information, return to setup to auto-fill again.

Missing data:

Item Description	Missing AutoFill	Entry Screen
Child: Timothy Z Zero	Education Level	Clerk/Collateral Entry
Child: Timothy Z Zero	School Name	Clerk/Collateral Entry
Child: Health	Special Dental Needs	Clerk/Collateral Entry
Dentist	Not Entered	Healthcare Provider Entry
Other Healthcare Provider	Not Entered	Healthcare Provider Entry
Clerk/Collateral	Check-up date	Clerk/Collateral Entry & Check-up entry
Child: Health	Special Medical Needs	Clerk/Collateral Entry
Child: Health	Allergies/Medications/Other	Clerk/Collateral Entry

Do you want to continue creating this document?

Yes No

## Formatting Corrections Required in Documents

### Voluntary Out-of-Home Placement Agreement -- Non-Indian Child

THIS IS AN AGREEMENT BETWEEN, Central Intelligence Agency, an agency duly authorized by the State of Minnesota to place children in out-of-home care, (hereinafter called the "agency"), and Zelda Zero, parent(s) of HKS Timothy Z Zero, III, residing at Line 1 Line 2 Line 3 city line, MN 55557-7787, Dover England, 89889, County of Dodge State of Minnesota. In consideration of the agreement herein made by the parents, the agency accepts said child for out-of-home care for the period of 08/11/2009 to 08/14/2009.

### Non-Indian Child

agency duly authorized by the State  
'agency'), and Zelda Zero, ,

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## Smooshing Based on Insertion Points

Name: *Timothy Z Zero, III*	Length of time in foster care: **
This plan starts on: *07/25/2009*	Current placement: **
Age: *9 years*	Permanency Plan: **
Birthdate: *02/11/2000*	Permanency Hearing due by: / /
ICWA: *Yes*	Concurrent Permanency Plan: **

Name: *Timothy Z Zero, III*	Length of time in foster care: **
This plan starts on: *08/03/2009*	Current placement: **
Age: *9 years*	Permanency Plan: **
Birthdate: *02/11/2000*	Permanency Hearing due by: / /
ICWA: *Yes*	Concurrent Permanency Plan: **

Insertion points show by default on service plans

They're different between documents and plans -

% versus << >>

You can smooch a service plan, but not a document

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## Current Issues

- Inconsistent use of merge fields
- Illogical prompting
- Randomly selected values
- Frankenstein
- Direct entry of missing data
- No data cleanup
- Formatting problems
- Smooshing!

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## Questions

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## New Template & Document Features

- Merge fields
- Tables with merge fields
- Font Styles
- Formatting – justification, bullets, indent, etc.
- Standard SSIS printing including email functionality and envelope printing
- Spell checking
- Protect document sections Combo boxes, radio buttons, check boxes, etc.
- Help text
- Style sheets
- County logos/letterhead
- Intelligent document creation

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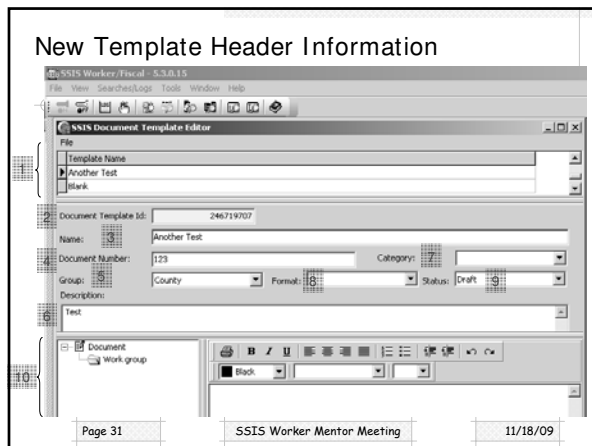
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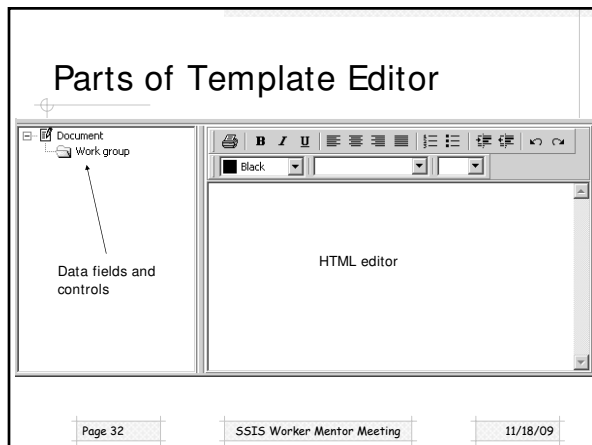
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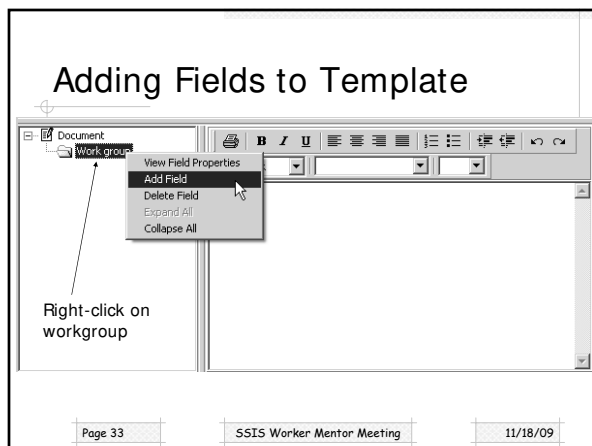
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## Specifying Field Properties

Document  
Work group

Add Document Template Field

☐ Required: ☐ User Selectable:

Date Format:  Time Format:

Staff Type:  Label:

☐ Name  
☐ Start date  
☐ Close Reason  
☒ Person  
☐ Case  
☐ Staff  
☐ SSIS Workgroup #  
☐ County WG #  
☐ County case extension  
☐ Close date  
☐ Unit  
☐ County of service

Pick a field, available properties change

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## Label Property

Document  
Work group

Add Document Template Field

☐ Required: ☐ User Selectable:

Date Format:  Time Format:

Staff Type:  Label:

☐ Name  
☐ Start date  
☐ Close Reason  
☒ Person  
☐ Case  
☐ Staff  
☐ SSIS Workgroup #  
☐ County WG #  
☐ County case extension  
☐ Close date  
☐ Unit  
☐ County of service

Some fields need a label

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## Adding Fields Under a Label

Document  
Work group

Add Fields for Parent1

☐ Required: ☐ User Selectable:

Date Format:  Time Format:

Staff Type:

☐ Birth date  
☐ Last name  
☒ Name without prefix  
☐ Address  
☐ E-mail  
☐ SSIS Person #  
☐ County Person #  
☐ SWNDX #  
☐ SSN  
☐ PMT  
☐ Gender code  
☐ Special medications  
☐ Gender

Now adding fields under label Parent1

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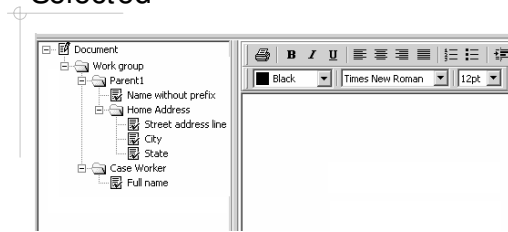
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## Template Editor with Fields Selected



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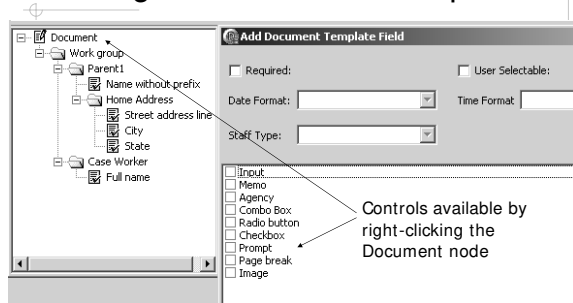
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## Adding Controls to a Template



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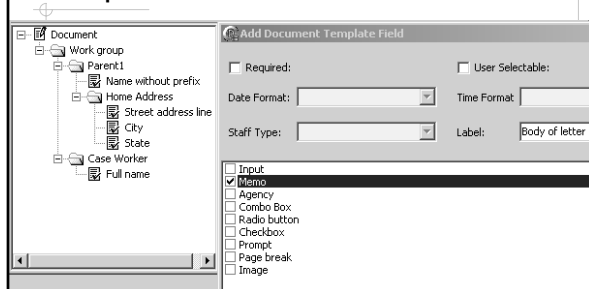
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## Properties for Controls



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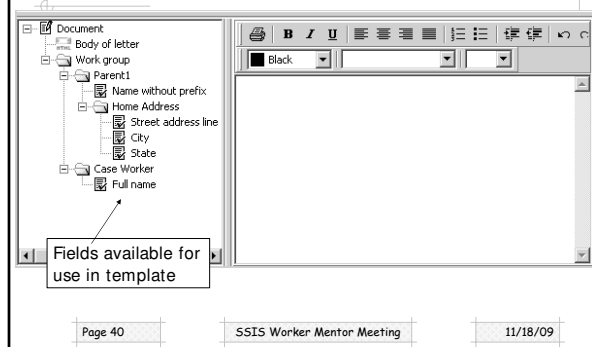
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## Completed List of Fields for a Template



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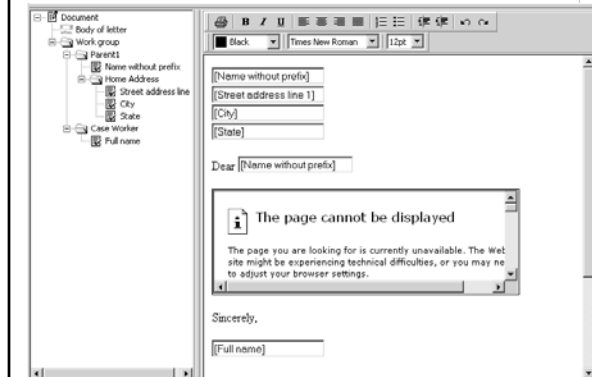
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## Completed Template



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## Other Template Features

- Ability to copy other custom templates as a base
- Flexible tables of data
- Ability to paste in text or HTML
- Barcodes



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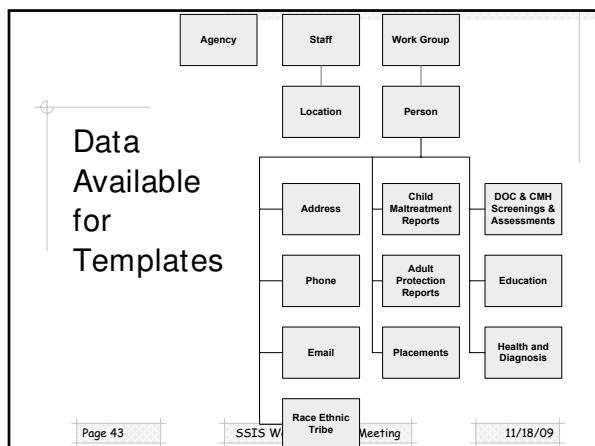
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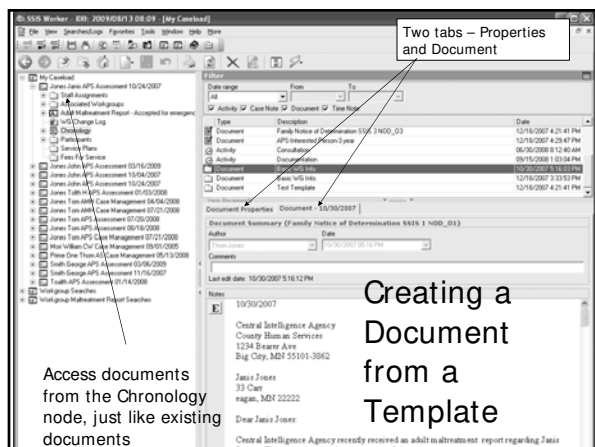
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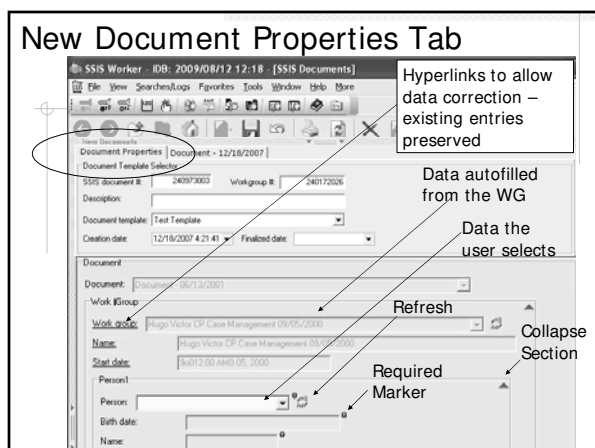
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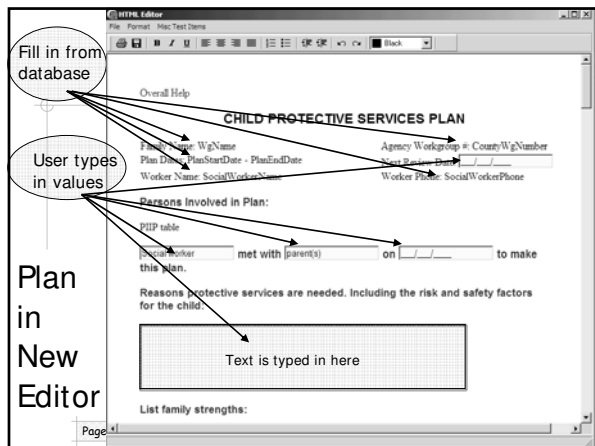
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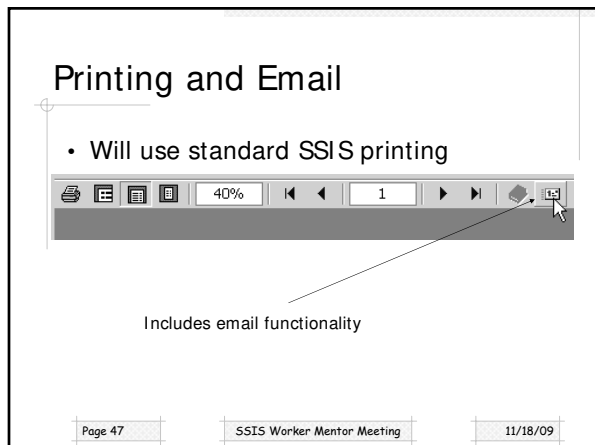
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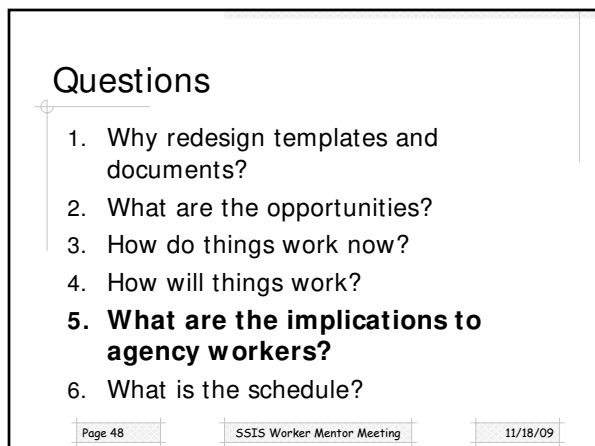
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## Implications

- Data should be as clean as possible
- All custom templates will need to be converted in SSIS Version 5.3
  - Partially automated

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## Implications (Cont.)

- Documents and Service Plans should be finalized prior to SSIS Version 5.5 if at all possible. New service plans will need to be created when due for review. Workers will be able to copy/paste text from an old plan to a new plan.
- The redesign is not intended to be an electronic document management system. SSIS is investigating document sharing options.

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## Template Conversion - Example

### Existing Template

Template Description: [Cy 95.00000 - Olnsted95 - Intervention Target Areas ABMU (12/02/05)]	
INTERVENTION TARGET AREAS [Unde	
Name: [Client1_Name]	Date: ____/____/____
Individual characteristics	
<input type="checkbox"/>	Favorable attitudes toward problem behaviors/Anti-social/pro-crim
<input type="checkbox"/>	Psychiatric symptomatology/Psychopathy, weak socialization, imp
<input type="checkbox"/>	taking, weak problem-solving skills
<input type="checkbox"/>	Cognitive bias to attribute hostile intent to others
<input type="checkbox"/>	Substance abuse
<input type="checkbox"/>	Limited leisure/recreational involvement

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## Template Conversion - Example

### Converted Template

Placeholders need to be deleted and manually added through editor

Address [E] M:\Developers\Lee\Template Conversion\Can Convert\ACTY\_5500000\_0UMTED05\_INTERVENT

INTERVENTION TARGET AREAS (Under

Name {{Client1\_Name}} Date {{client\_session}}

Individual characteristics

	Favorable attitudes toward problem behaviors/Anti-social/pro-criminal atti
	Psychiatric symptomatology/Psychopathy, weak socialization, impulsivity, r
	problem-solving skills
	Cognitive bias to attribute hostile intent to others

Spacing  
between  
lines is off

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## Schedule

- SSIS 5.3 for template conversion: January-February 2010
- SSIS Version 5.5 with the new document system: Spring 2010

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