"collaboration through innovation"

WUG Meeting Minutes, March 4, 2009

Introductions:

FEI:	Sarah Moore, WUG Coordinator
	Marion Sarhy
	Chirag Bhatt
	Ludwing Najera
	Becky Kinney
	Jennifer Conrad
	Lee Keitz
Maryland:	Joe Hong
SLCo:	Cory Westergard
Hawaii:	Steve Okano
San Diego:	Paula Martinez
	Alice McLennan
Iowa:	Kory Schnoor
	Steve
Alaska:	Michael Walker
Idaho:	Kipp Dana
	Arlene Witbeck

Presentation of WUG:

- Purpose is to enhance communication between FEI and FEI WITS customers, especially regarding issues or new items that impact the entire user group.
- Maintain a dialogue and come to resolution on topics that are relevant to the group (cross-customer items).
- Difference between WUG and WCP:
  - The WUG includes FEI as a member, and focuses on what is currently happening with WITS. It is for FEI WITS customers.
  - The WCP does not include FEI as a member, and often focuses on long term goals for WITS and treatment best practices. It is open to any WITS stakeholder.

Meetings will be held on the ***last Wednesday of every month. The next meeting is scheduled for March 25th at 1pm EST.*** This schedule can be changed if the membership makes that request.

FEI has recently launched their new website (www.feinfo.com) and it will be an important communication tool for the WUG. For instance, the link to the new Work Item access can be found on the following page: http://www.feinfo.com/wug/wits-releases

A demo/review of the Work Item access, which is now available to FEI WITS customers:

- For those currently using SSRS, this will be very familiar. It is SSRS reporting done on FEI's Work Item tracking system, which means that you can view the status of Work Items at any time, for any FEI WITS customer.
- Work Item access includes canned reports, and the option to build your own reports.
  - Demoed a canned table report of items - Release Notes

  - Demoed Report Builder, where you can create your own reports
  - Demoed report subscriptions
- Bugs are in red; Enhancements in green.
- Reports can be exported to Excel.
- Each customer will have their own "sandbox" folder for reports that they create. Please save all created reports to this folder.
- Each customer will have a single login for the site. Contact wug@feinfo.com for your access information.
- In order to get the most out of this tool, some understanding of FEI's Work Item process is necessary. Knowing how FEI uses these fields will make the reports more meaningful for you. FEI will be providing information on their process, both in WUG meetings and online.

Customer Questions:

<u>Cory in SLCo</u>:

- Can we search by Work Item update date? For instance, if the description has changed?
  - Response: Not at this time, because all changes are recorded in the History section of the Work Item, which is not a searchable field. You can see the created date and the date of the most recent status change, however.
- If changes are made to base WITS but a particular customer doesn't like the change, do they have to pay to remove it?
  - Response: Part of FEI's reason for launching the WUG is to have a group discussion on issues such as these before they are coded. We will talk through approaches to various issues and try to reach consensus on as many items as possible.
- Are ADAM changes listed as Work Items here? For instance, they had an experience where a role was removed for one of their users but they did not receive release notes or information about it until after the fact.
  - Response: This would have been a Production Support Work Item. We will create a canned report for tracking Production Support items specifically.

<u>Alice in San Diego</u>:

- Can we see enhancements?
  - Response: Yes, they are the Work Items in green text on the reports. Bugs are in red.
- Will we need to create our own reports to look at just enhancements?
  - Response: Yes , or we can add a WI type filter on the canned report.

Cross-Customer Impact Items:

- Consented Activity Client List
  - Proposal
    - ***Remove clients and their consented records from the consented activity client list upon discharge or the consent's expiration, or closing the episode.***
  - Feedback & Potential Solutions
    - None of the three proposed dates for dropping a client seem to be the right time to do so.
    - Once a client activity has been consented, that consented information is part of the referred-to agencies' client record and should not be removed.
    - The core issue seems to be that there is no way to manage this list currently, and it gets very long.

        - This brought up an additional issue, which is that any staff person can see any consented activity, even if they don't have access to the rest of that client's records. It would be nice if this problem could be addressed at the same time.
        - Perhaps some filtering options on this list would resolve how unwieldy it is.
        - Perhaps linking the consented activities to the client record in that agency somehow would be a good solution- this would allow the client's record to be contained in the same place, and would prevent staff from seeing it if they didn't have access.
            - Do we need to be able to see consented information if the client is never created at the referred to agency?
            - And what happens to these items on the consented client records list if the client is never created at that agency?
    - Risk Factor
        - TBD
    - FEI Recommendation
        - TBD

- Standardization of Headers on Consented Activities
    - Proposal
        - ***Standardize the format and the information that is provided with a Consented Activity.***
    - Feedback & Potential Solutions
        - Keep in mind that SLCo has a different format for the DENS ASI, which must be preserved.
        - Participants agreed that standardization would be good here.
        - San Diego noted that if client information is included in the header, then it is even more important to be able to control who can access consented activities.
        - Sarah will provide a few examples of consented activities that are formatted differently.
    - Risk Factor
        - TBD
    - FEI Recommendation
        - TBD

Additional Notes:
Cory in SLCo has IE6, and website shows differently than Sarah's demo, which is in IE7. We will look into this.

Action Items:

- If you have questions about WITS, or items you would like discussed in a WUG meeting, please send your questions to Sarah at wug@feinfo.com at least a week before the next meeting (deadline would be 3/18 this month). This will give the FEI team to review and discuss the requests before the meeting. We will try to include Items submitted after the deadline, but it may not be possible.
- Contact wug@feinfo.com for your Work Item access information.
- Send suggestions about what the WUG can do to benefit your WITS organization to Sarah at wug@feinfo.com.

- FEI will create a canned report for tracking Production Support items specifically.
- FEI will review the two Cross-Customer Impact items and provide recommendations if appropriate.
- Sarah will provide examples of consented activities that are formatted differently.