Fiscal Mentor Expectations

Fiscal Mentor Meeting

September 17, 2013

Background

- Roles of a Fiscal Mentor have not been reviewed since the program began in 2005.
- There has been significant turnover of Fiscal Mentors and Coordinators in agencies.
- Agency staff have reported not getting information about changes to SSIS.

Be Prepared to Share

- How do you:
  - Inform staff of changes to SSIS
  - Provide documentation to staff
  - Train agency staff
  - Track mentor time
  - Coordinate with other mentors in your agency as well as the SSIS Fiscal Coordinator
  - Inform staff of upcoming training

Selecting an Effective Mentor

- Someone familiar with accounting, claiming and reporting processes in your agency.
- Someone in your agency who people naturally go to with questions related to fiscal processes.
- Someone willing to 'coach' SSIS Fiscal users who need help, rather than just solve the problem at hand.
- Someone who is able to communicate with the Fiscal Coordinator to determine and ensure the correct agency staff are getting the Fiscal information pertaining to their job duties.

A Fiscal Mentor

- Receives specialized training related to SSIS Fiscal.
- Attends Fiscal Mentor Meetings to receive information and updates on SSIS Fiscal functionality.
- Works with the agency Fiscal Coordinator to resolve project and local agency problems.
- Supplies day-to-day user support by providing examples of, or training on, system changes.
- Gathers and provides input to regional Fiscal Advisory Committee (FAC) representatives when requested.
- Prepares staff for Fiscal New Worker training and follows up with them after training.

A Fiscal Mentor also

- Serves as a communication link between agency accounting staff and SSIS by:
  - Reporting bugs or usability issues to the SSIS Help Desk
  - Communicating best practices or workarounds to agency staff
- Distributes information to agency staff from:
  - SSIS Updates
  - Release information
  - Mentor meeting information
  - Personal knowledge
  - Implementation Memos

Characteristics of a Fiscal Mentor

- Program knowledge
  - Understands how social services and fiscal departments work together and knows the work flow
  - Can explain to fiscal staff why things are done in a certain way
  - Can explain what data means and how it is used
- Technical skills
  - Learns navigation quickly
  - Troubleshoots and understands hardware/software issues vs. user issues
  - Knows who to call for help

Characteristics of a Fiscal Mentor cont.

- Problem solving skills
  - Solves problems methodically
  - Attentive to detail and documentation
  - Considers the consequences of an action
- Communication skills
  - Explains things in an understandable way
  - Keeps things simple but effective
  - Presents information in a variety of ways for different learning styles
  - Knows who to talk to first when there are issues

Characteristics of a Fiscal Mentor cont.

- People skills
  - Empowers workers who need assistance to build competence
  - Knows when to lead and when to observe
  - Knows how to listen for the question or issue
  - Is friendly and patient
  - Explains things in an understandable way
  - Keeps things simple but effective
  - Presents information in a variety of ways for different learning styles

Characteristics of a Fiscal Mentor cont.

- Relationships with State SSIS Staff
  - Contacts the Help Desk with questions or issues and abides by the calling procedure
  - Notifies SSIS of fiscal staff changes to update agency contact information (Fiscal Coordinator, Fiscal Mentor – Primary or Alternate, Fiscal Supervisor)
  - Acts as the agency contact for piloting fiscal changes/additions in new releases

Characteristics of a Fiscal Mentor cont.

- Foresight
  - Plans ahead for versions and updates
  - Grasps how a release will affect agency operations and procedures
  - Works to prepare staff for change
  - Determines which staff need additional training on SSIS
  - Keeps agency training materials up to date

Characteristics of a Fiscal Mentor cont.

- A willingness to learn and an ability to disseminate
  - Attends mentor meetings and trainings
  - Takes information from the mentor meeting, mentor meeting minutes, and other information media (training materials, SSIS Update articles) and relays it to the correct agency staff.
  - Keeps a distribution list of who to send information to in the agency
  - Seeks opportunities to learn and teach
  - Committed to being a strong mentor

RESOURCES

SSIS Website

Skip to: Main content | Subnavigation |

Monday, July 29, 2013

Minnesota Department of Human Services

County Link — A resource for counties and tribes

Minnesota.gov

CountyLink Home Page | DHS Home Page | Bulletins | eDocs | A-Z Topics | Advanced Search keyword

County Reports/Results | DHS Program Resources | DHS Systems & IT Updates | Fiscal Reporting & Accounting | Manuals | Policy Inquiries | TrainLink

MN-ITS
MAXIS resources
MEC² resources
MMIS resources
PRISM resources
SIR
SMI
SSIS resources
- Fiscal
- Fiscal Mentor Program
- Worker Mentor Program
- Outcome Charting
- Publications
- Support
- SWNDX / SMI
- Training: Worker & Fiscal
- Worker

> DHS Systems and IT Updates > SSIS resources

Social Service Information System (SSIS)

Find what you're looking for on the SSIS site map:

Fiscal
- Fiscal Advisory Committee
- Original Design Documents
- Software Specs
- SSIS Fiscal Flyer

Fiscal Mentor Program
- Fiscal Mentor Manual
- Meeting Information
- Meeting Minutes
- Resources

Worker
- Worker Advisory Group
- Worker Software Specs

Worker Mentor Program
- Handouts
- Meeting Information
- Meeting Minutes
- Resources
- Worker Mentor Manual

Support
- Data Definitions
- IFSpi Interface Documents
- Plans and Forms
- Release Notes
- System Documents

Outcome Charting
- Federal Indicators
- State Indicators

Publications
- Implementation Memos
- Partnership Group Meeting Minutes
- Related Documents
- SSIS Fiscal Flyer
- SSIS Updates

SSIS WORKER Training
- Release & Pilot Training
- NWT
- SSIS WBT Instructions
- VA-CEP
- Online Training (iLinc)
- Documentation
- Resources
- Centralized Training Database

SSIS FISCAL Training
- Release Training
- FNWT
- Online Training
- Documentation
- Resources

SWNDX/SMI

Supporting SSIS documentation is posted to the web. SSIS Updates list documents that are new or have been updated.

TrainLink

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Training News and Information
- Adult Mental Health
- Alcohol and Drug Abuse
- Child Support
- Children's Mental Health
- Disability Services
- Health Care
- HIV/AIDS
- Income Maintenance
- SSIS

Help/TrainLink FAQ

> TrainLink > Training News and Information

Skip to Learning Centers

TrainLink — Your "On Track" Training Resource

Unique Key Request: Never taken a DHS sponsored training class? Forgot your Training Unique Key? Need to update your information? Click this link for the Unique Key Request Form.

Note: If you are a DHS (SOS/CO) employee, use your employee ID as your unique key. Do not request a new unique key.

Help/TrainLink FAQ: Need help? New to TrainLink? Click this link for the Help and Trainlink FAQ page.

Maps, Maps, and More Maps: Need a map to a Minnesota Department of Human Services metro building location or a Training Lab? Click this link for the Maps of DHS Locations page.

Learning Centers: Select a link below to access a Learning Center with program specific course offerings and registration information. **Note:** The Training Learning Centers are unavailable for system maintenance from 7:00 a.m. to 8:30 a.m. every Friday.

- Adult and Children's Mental Health
- Alcohol & Drug Abuse
- Child Support
- Children's Services
- Continuing Care
- Health Care
- Income Maintenance and Employment Services
- Licensing

Minnesota Department of Human Services

Logo

Children's Services Learning Center

Main Menu

Training Activities and Registration
- Online Course Search
- Search Learning Activities
- Class Schedules/Registration
- View a Class Roster

Student Information
- Find Your Unique Key
- Information We Have About You
- View or Print Your Transcript
- Your Training Calendar
- Your Training Plan

Other Information
- Contact Us
- TrainLink Home

TrainLink – Finding SSIS Classes

Minnesota Department of **Human Services**

Home

Sign On | Sign Of

Class Schedules/Registration

Select the category of the class you want. You can also optionally search the names of classes for specific words, and limit the range of class start dates. While the Learning Center can display classes for the forthcoming year, not all units schedule classes that far in advance. Most schedules are updated quarterly. Online Courses are not found in this catalog. Please return to the Main Menu for online courses.

All SSIS Classes
SSIS New Worker Basics
SSIS Fiscal New Worker
SSIS Fiscal Mentor Meeting St. Cloud
SSIS Fiscal Mentor Meeting VPC

Search for these words:

Search All Words Search Any Words

From (today or later) 07/29/2013 To 07/24/2014

GO!

Minnesota Department of **Human Services**

Home > Class Schedules/Registration

Sign On | Sign Off

SSIS Fiscal Mentor Meeting St. Cloud

Select a class for more information, to register, or to change a registration.

Search Again | Calendar View

Sort on Start Date Sort Now

Class Name	Course Code	Start Date	End Date	City	Available Seats	Delivery Method
SSIS FISCAL MENTOR MEETING	SSIS107F	09/17/2013	09/17/2013	ST CLOUD	127	Classroom

TrainLink – Registering for SSIS Classes

Minnesota Department of **Human Services**

Home > Class Schedules/Registration > SSIS Fiscal Mentor Meeting St. Cloud

SSIS FISCAL MENTOR MEETING

Here is more information about this class:

For access/registration information, click here

Class Detail

Class Data

Course Code:	SSIS107F
Class Name:	SSIS FISCAL MENTOR MEETING
Division Class Owner:	Social Services Information System
Class Contact Name:	Mary Klinghagen
Prerequisite(s):	N
Location:	ST CLOUD HOLIDAY INN
Room:	HUSKIES
Street Address:	75 37TH AVENUE SOUTH
City:	ST CLOUD
Start Date:	09/17/2013
Start Time:	09:00 AM
End Date:	09/17/2013
End Time:	03:00 PM

Learning Center Sign On

Please sign on:

Employee ID:

OK Sign Off

TrainLink – Unique Key – Top Portion

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Monday, July 29, 2013

Minnesota Department of Human Services

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Advanced Search keyword

County Reports/Results | DHS Program Resources | DHS Systems & IT Updates | Fiscal Reporting & Accounting | Manuals | Policy Inquiries | TrainLink

Training News and Information
Help/TrainLink FAQ

> TrainLink

Unique Key Request Form

Please check the Unique Key Search before completing and submitting this form!

Unique Key Request Person Data

Required fields are marked by asterisks *

Type of Request: Choose Type

If Known, County X1 number or Unique Key:

Last Name*:

First Name*:

Middle Initial*:

Maiden/Other Names:

Agency Name*:

Agency Street Address*:

City*:

State*:

Zip Code or Zip+4*:

Phone Number*:

E-mail Address and Verification

E-mail Address*:

Re-enter E-mail Address*:

TrainLink – Unique Key – Bottom Portion

County or Reservation

County: Choose County

Reservation: Choose Reservation

Job Info

Job Title*:

Job Start Date:

(The Training Coordinator will receive e-mail copies of some course correspondence. If you do not have a Training Coordinator, please skip these responses.)

Training Coordinator's Name:

Training Coordinator's E-mail:

Accessibility Needs

Indicate accessibility needs:

Submitting this form will generate an e-mail to the Training Administrators.

Your Unique Key will be e-mailed within two business days.

Your name, phone number, e-mail address, and agency name will be displayed on class rosters that may be seen online by other individuals attending the same class as you.

Submit Reset

iLinc – Public Sessions – Register tab

https://minnesota.ilinc.com

Minnesota Department of Human Services

Help | Log In

Home

| Sep 03, 2013 | All times in Central Time | English

Log In | Public Sessions | Instant Sessions | System Test

greenmeter

4,445,303

Approximately 222,265 gallons of gas

JOIN PRIVATE SESSION

JOIN

Enter Session ID

Public Page -- Open Sessions

To Register:

1. Place a check in the box before the session
2. Scroll to the bottom of the page and select "Register"

You will be asked to enter the name and email address of person you are registering. An email invite will be sent to the person with further details and instruction for joining the session.

Register | Join

Search

TYPE	SESSION NAME	DATE/TIME (CENTRAL TIME)	STATUS	SEATS	ACTIONS
	Entering an Application on MAXIS Recording	05/30/2012 12:45 PM		Unlimited	
	SSIS V13.3 Statewide Release Training Recording (08/26/2013)	08/26/2013 02:00 AM		Unlimited	
	New MN-ITS Screens - 837P (Professional) for FQHC/RHC Providers	09/03/2013 01:30 PM		1492	
	New 837P (Professional) MN-ITS Screens - For billing Medical Equipment, Supplies, Hearing Aids, Augmentative Devices, Prosthetic/Orthotics	09/04/2013 09:30 AM		1471	
	New 837P (Professional) MN-ITS Screen - For Billing Rehabilitative Services, OT, PT, SLP	09/04/2013 01:30 PM		1490	
	Completing Waiver/AC Provider Record Review & 245D License	09/06/2013 09:30 AM		1474	
	New MN-ITS Screens - 837I – Submitting Home care (non-PCA) Claims	09/06/2013 01:30 PM		1491	
	New 837P (Professional) MN-ITS Screen - For Billing IEP Services	09/09/2013 09:30 AM		1467	
	New 837I (Institutional - Outpatient) MN-ITS Screen - For Billing Rehabilitative Services, OT, PT, SLP	09/09/2013 01:30 PM		1492	
	New MN-ITS Screens - 837P - Submitting PCA Claims	09/11/2013 09:30 AM		1486	

Page 1 of 5

Results 1-10 of 45 | Show 10

Register

iLinc – Public Sessions – Join tab

Minnesota Department of Human Services

Help | Log In

Home

| Jul 29, 2013 | All times in Central Time | English

Log In | Public Sessions | Instant Sessions | System Test

greenmeter

4,345,745

Approximately 217,287 gallons of gas

JOIN PRIVATE SESSION

JOIN

Enter Session ID

Public Page -- Open Sessions

To join, click the "Join" link to the left of the item you would like to join.

Register | Join

Search

	TYPE	SESSION NAME	DATE/TIME (CENTRAL TIME)	ACTIONS
OPEN		Background Study Planned Enhancements Part I	Always Available	
OPEN		Background Study Planned Enhancements Part II	Always Available	
JOIN		Benefits and Work Assessment 1	Always Available	
JOIN		Brian Balk's Support Room	Always Available	
JOIN		Copy of Disproportionate Share Hospital (DSH) Audit	Always Available	
OPEN		Defusing Hostile Clients Evaluation Part 2	Always Available	
OPEN		Defusing Hostile Clients Evaluation Part 3	Always Available	
OPEN		Fiscal Mentor Refresher #1 - General Navigation - Case/Workgroup/Particpant - Searches/Logs Recording (12/14/2009)	Always Available	
OPEN		Fiscal Mentor Refresher #2- COA, COA Maximums, Business Organizations Recording (02/10/2010)	Always Available	
OPEN		Fiscal Refresher #3 - Service Arrangements Recording (04/14/2010)	Always Available	

Page 4 of 6

Results 31-40 of 52 | Show 10

SSIS Help Desk

dhs.ssishelp@state.mn.us

651-431-4801

SSIS Help Desk Call Prioritization

Incoming calls go through a "triage" procedure that assigns calls or e-mails to the following categories/priorities and resolves problems in that order:	Timelines
• ***Urgent*** - Examples: Server is down, worker needs document for court, data is accidentally deleted or purged, Payment data integrity errors (payments are duplicated, incorrect amounts, wrong vendors, etc.), a state report is due today and the agency cannot submit the report.	***Urgent*** - Problems are guaranteed a call back within one work day.
• ***Critical*** - Examples: Problems with the application – Problem Report needed, or needs assistance or is unable to perform necessary work. All fiscal interface issues are Critical.	***Critical*** - SSIS attempts to call back or e-mail within 48 hours.
• ***Normal*** - Examples: "What if" questions, questions about future SSIS functions, documentation and training questions, and enhancement requests.	***Normal*** - It could be a week or more for a response.
• ***Warning*** – Automatically generated TEC Tickets	***Warning*** - Daily emails sent to counties notifying them. (E.g. Removable backup media has not been replaced)

Help Desk Troubleshooting Questions

- Is the problem only at one workstation?
  - If yes, how often does it happen?
  - If no, how many workstations are having the problem?
  - What do these workstations have in common?
- What actions did the user take prior to the problem occurring?

Help Desk Troubleshooting Questions cont.

- What have you already tried to resolve the problem?
- What steps were taken to produce the issue?
- Are these steps repeatable by others?
- Is there a particular order to the steps the user takes that causes the problem?
- Is there a workaround?

Help Desk Troubleshooting Questions cont.

- Have you checked training modules, mentor handouts, job aids, and release notes on the website or the SSIS Help files?
- Is the workstation/server down or can work continue?
- Is there an error message? Can you email the screenshot to the SSIS Help Desk?
- Have you checked messages on the interface logs?
- Have you checked with agency technical staff?
- When is a good time to reach you if we need to call you back?

Enhancement Requests

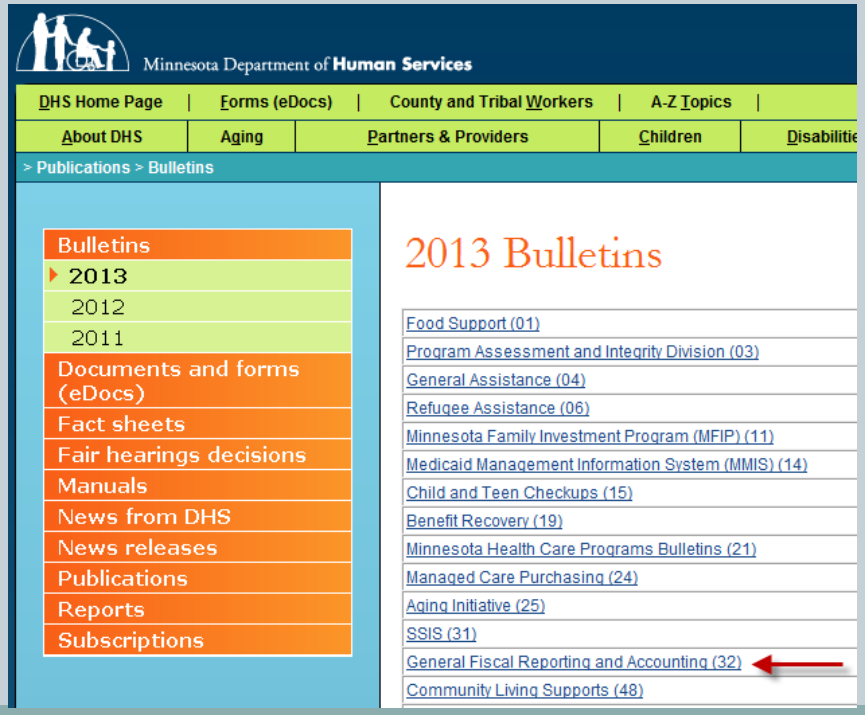
Enhancement requests are sent to the SSIS Help Desk or can be submitted through your Fiscal Advisory Committee representative.

Include in the request:

- Specific screen or report for which you would like to see the changes
- Business need for the change, give several examples if possible
- Mock up of what you would like the screen to look like

Federal Financial Participation (FFP)

- Agencies can receive FFP for Child Welfare related mentor time
  - DHS Bulletin 13-32-10 Instructions for Completing the Social Services Fund Report, Form DHS-2556



DHS 2556

SOCIAL SERVICE FUND REPORT

County Name _____ County No. _____ For the Quarter Ending (MM/DD/YY) _____

SECTION 3: SSTS REDUCTIONS - DIRECT CHARGES

DHS Approved Reductions In The SSTS: DIRECT CHARGES

		Remarks	Totals	
(1)	MSW/BSW Child Welfare Training Program (From Section B Line B8)		0	(1)
(2)	SSIS Operational Costs (From Line A6 below)		0	(2)
(3)	SSIS Depreciation (From Line A7 below)		0	(3)
(4)	Minnesota Child Welfare Training - Travel & Per Diem			(4)
(5)				(5)
(6)	**TOTAL DHS Approved Reductions / DIRECT CHARGES**		0	(6)

DHS 2556 cont.

A. SSIS DIRECT CHARGE DETAIL

Please report only the portion of direct-charged expenditures allowable for FFP

	Remarks	Gross Expenditures prior to allocation to SSIS	Total Operational Expenses Allocated to SSIS	Total Capital Outlay to be Depreciated	
PERSONNEL COSTS					A1.
A1. Maintenance Programming/Testing					A2.
A2. User and Desktop Support					
HARDWARE/NETWORK/ COMMUNICATIONS/SOFTWARE					
A3. Hardware/Network/Communications					A3.
A4. Software (specify)					A4.
OTHER					
A5. Other (specify)					A5.
A6. **Total Expenditures** (Allocated to SSIS - To Line 2 above)		0	0	0	A6.
A7. **Depreciation Expense for Quarter** (Allocated to SSIS - To Line 3 above)					A7.

SSIS Direct Charge Detail

- Section 3 Part A – SSIS Direct Charge Detail
  - Pages A-13 – A-17 of DHS Bulletin 13-32-10
    - SSIS operational costs are eligible for Title IV-E reimbursement in accordance with our State Cost Allocation Plan. All operational costs must first be allocated between all departments benefiting from the operational cost.
    - Operational costs to support the social workers and support staff that spends a significant portion of their time with child welfare activities may be directly charged to SSIS.
    - Do not report any development (programming) costs unless you have received prior approval.

Section 3 Part A Line Item Instructions

- Remarks Column
  - Record notes for descriptive details about the expenditure listed on that line.
- Gross Expenditures (include all workers and equipment)
  - Report the gross cost for that line item.
- Total Operational Expenses Allocated
  - Report the portion of the gross costs that are eligible for direct-charge to SSIS for federal reimbursement (i.e., the portion that can be allocated to child protection and child welfare).

Line A1–Maintenance Programming/Testing

- Maintenance Programming/Testing
  - Only claimable under special circumstances with prior approval from SSIS.
  - Only 'custom counties' should have these costs.

Line A2 – User and Desktop Support

Include:

- Costs for personnel to support users and to coordinate the operation of SSIS.
- Time spent supporting SSIS application issues and SSIS users by SSIS Coordinators and Trainers may be included.
- Time spent by mentors in training new users or for ongoing training of the SSIS application may be included.

Line A2

- Include desktop and network support for:
  - Operations related to SSIS use
  - Those who are responsible for installing client software, maintaining system backups, running system maintenance and interface programs, and disaster recovery.

Line A2 cont.

- Examples of eligible costs are:
  - Mentor time spent at SSIS Mentor Meeting and regional meetings
  - Mentor time spent helping or training agency users
  - SSIS Coordinator time at regional meetings and on SSIS-related activities
  - Network and desktop support staff time on SSIS-related tasks, such as installing SSIS workstations, installing and supporting firmware, and troubleshooting network-related problems

Line A3 – Hardware/Network/Communications

- Include costs for workstation and network hardware for new workers, and replacement or upgrades of existing equipment. Replacement of equipment originally purchased for SSIS for which SSIS reimbursement has been claimed is generally limited to equipment greater than three years old, unless an earlier upgrade is required to run SSIS. Also include router lease and maintenance, hubs, communication servers, leased lines, etc.

Line A3 cont.

- Examples of eligible costs include:
  - Service for SSIS equipment (workstations and LAN hardware)
  - Equipment that supports SSIS, such as routers
  - Upgrades to workstations, such as memory, disk, or operating system upgrades
  - Replacement workstations provided that the equipment being replaced is over three years old
  - Costs for off-site storage of SSIS backup media
  - Communications charges, such as router leases or maintenance

Line A4 - Software

- Costs for SSIS-required software.
  Only software necessary to operate SSIS is eligible.
  - None currently eligible at this time.

Line A5 – Other (specify)

- Include other miscellaneous costs such as:
  - Supplies and overhead directly related to SSIS training in the county, such as photocopying end-user materials
  - Training facility costs
  - Contractors hired to do SSIS training
  - Travel costs for trainers

Line A6 – Total Expenditures

- Maintenance Programming/Testing
  - Only claimable under special circumstances with prior approval from SSIS.
  - Only 'custom counties' should have these costs.

Line A7 – Depreciation Expense for Quarter

- Enter the amount of depreciation for capitalized SSIS equipment for the quarter.

Costs NOT eligible for reimbursement

- Design, development, and support of new county-specific computer applications, whether or not they interface with SSIS. Exceptions require prior approval.
- Time of staff while they are using SSIS, regardless of classification. This time should be included in SSTS.
- Staff time of trainees receiving SSIS training
- Any costs related to supporting workers <u>other than</u> child welfare, child protection, child mental health, child DD, child foster care licensing, or adoption workers
- Furniture of any type

Agency Processes

- How do you:
  - Inform staff of changes to SSIS
  - Inform staff of upcoming training
  - Provide documentation to staff
  - Train agency staff
  - Track mentor time
  - Coordinate with other mentors in your agency as well as the SSIS Fiscal Coordinator

QUESTIONS???