

Consultant and Trainer Advisory Group

4/17/13

Minutes

In attendance: Amy Warnagiris, Kathleen Swain, Vince Burns, Jessica Shiffler, Rob Winesickle, June fisher, Marsha Lynch, Crystal Bittinger

On phone: Kim Gavran, Darla Henry, Kathy Moore, Joan Mosier

1. Introduce new CTAG Co-Chair
 - a. Kathleen Swain will be replacing Jennifer Kerr
 - b. Kathleen is the Western Regional Team Supervisor at the Resource Center
2. Berks County Move to SE Region – Review and Questions
 - a. If a trainer lives in Berks Co; it was changed in Encompass to read southeast
 - b. Jessica Shiffler will now be the Resource Specialist that works with Berks Co
 - c. Chris Reese is the Southeast Regional Supervisor that will work with Berks Co
 - d. There will be an article in the next Trainer Palette
3. Follow-up on Payment Processing questions - Vince Burns Fiscal and Human Resources Department Manager, from the Resource Center Fiscal Department joined the meeting
 - a. We have received feedback from some trainers regarding the length of time for a trainer to receive payment
 - b. Since 2002, the University of Pittsburgh has operated the Resource Center as a program within the University's School of Social Work
 - c. The University also operates a centralized Payment Processing Department
 - d. The University uses centralized Payment Processing
 - i. to avoid duplication of services
 - ii. for audit control purposes
 - iii. for other business reasons
 - e. This means the CWRC processes payments through the University's on-campus, Payment Processing Department located in Pittsburgh at the Oakland Campus
 - f. But to put our volume of payment activity into perspective, please note
 - i. The University has a nearly \$2 billion annual operating budget
 - ii. But CWRC makes up less than 1% of the University's budget
 - g. So while our physical separation from main campus adds an additional layer to the life cycle of a payment, our volume of payment requests are already an expected part of the workflow at Payment Processing
 - h. Regarding the specifics of the life cycle of a payment and our quality controls, the process is as follows:
 - i. Upon completion of a training, the Trainer generally mails his/her invoice to CWRC
 - ii. Administrative support staff open trainer mail and forward invoices to the respective Regional Resource Specialist for verification and approval.
 - iii. Once approved by the Resource Specialist, Trainer Invoices are forwarded to the Fiscal Unit

- iv. Invoices are processed at CWRC on a weekly basis
 - v. Invoices that have been approved and submitted to Fiscal by Monday of each week will be included in our weekly batch
 - vi. For each invoice, the Fiscal Unit must prepare a Disbursement Request for Payment Processing
 - vii. Preparation of Disbursement Requests, and subsequent, required approvals from me and the CWRC Director, generally allow us to send the weekly batch to Payment Processing by Thursday each week
 - viii. Soonest disbursement request input into the A/P system at Payment Processing occurs in 3 weeks from receipt by the Payment Processing Department. NOTE: Over holidays and during periods of high volume input could take longer
 - ix. Checks are generated on the next day, and generally mailed the following business day
 - x. Depending on the delivery location, mail delivery by the U.S. Postal Service could take up to a week
 - xi. So to recap with timeframes
 - 1. 1½ weeks at CWRC (including mailing time to Payment Processing)
 - 2. 3½ weeks in Payment Processing (including check generation and mailing)
 - 3. 1 week to be delivered
 - 4. Best case scenario is 6 weeks
 - 5. I generally inform vendors that payments should be received in 6-8 weeks from the time CWRC receives an invoice
 - i. If payments have not been received within 8 weeks, we want to know.
 - j. Trainers can contact their Resource Specialist or our Fiscal Specialist, John Stought (717-795-9048, or jos135@pitt.edu)
4. Resource Center Updates
- a. Human Resources
 - i. Mike Byers was the Statewide Quality Improvement Department Manager. He has moved into the Assistant Director role for the CWRC. The CWRC is in the hiring process for the Statewide Quality Improvement Department Manager.
 - ii. We are hiring 4 positions for the Demonstration (4/E waiver) project
 - iii. There will be openings for 2 Project Managers
 - iv. Chris Nobles has been hired as our second Youth Quality Improvement Specialist
 - v. Training Specialist title has been changed to Resource Specialist
 - b. Curriculum – The following courses are in development
 - i. Ethical Engagement and Services to Children and Families with Hearing and/or Vision Loss
 - ii. Truancy
 - iii. Engaging Fathers
 - iv. Visitation
5. Review of new processes for participants:

- a. Participant Incident Escalation Process
 - i. Designed to give support to trainers
 - ii. A survey was sent last fall to Administrators polling how they would like to receive the information
- b. Participant Recognition Process
 - i. Participants who deserve recognition as being an engaged participant
 - ii. Administrators and Supervisors will be given information of their staff
 - iii. Not necessarily needing to “find” a person for each training
 - iv. Expectation of positive remarks?
- c. Did people have a chance to review?
 - i. Will table until next meeting
 - ii. Processes attached for review
- 6. Trainer and Consultant Handbook Review & Feedback Plan
 - a. Final draft by the end of May with feedback form
 - b. Will use May CTAG call to review and give feedback
 - c. 45 pages (policy portion)
 - d. Feedback forms mid-May
 - e. Will be posted online when final
- 7. Reminder about Spring Events - Dates:
 - a. May 10, 2013 - CWRC
 - b. May 23, 2013 - Norristown
 - c. June 6, 2013 - Monroeville
- 8. Questions/Open Forum
 - a. Is there any way to know how much training will be given to trainers every 6 months?
 - i. Scope of the trainer utilization workgroup
 - ii. Scheduling has significantly changed
 - 1. Using new trainers
 - 2. Emails for a last minute trainer
 - a. If training and can't get to the call, position is filled by others
 - iii. Desired future state – quality to the participants; equitability of trainers
 - iv. Doesn't seem to be regional as in the past
 - v. QSR trainers are being chosen from the new trainer pool
 - 1. Why not use the best trainers?
 - 2. Need to use trainers that have DAPIM experience
 - vi. No changes to policy or process changes
 - 1. Equitability has been discussed
- 9. Next meeting—June 12 12:00-1:00