

Updates, Reminders and Recommendations from the MIS Team

Another new MIS update/feature has been published. The MIS now allows *terminations of worker roles or temporary termination of a worker*. Let's take a deep dive into these features.

1. Only MIS Users with a Supervisor or Data Entry roles can access the worker form.
2. Click on *Worker Form* to access the list of active and termed workers for your program. (FYI, The Worker form is the last option in the Data Entry column under the Settings tab.)
3. Click the edit button to open the Worker Form.
4. In the past, roles entered on a worker form were permanent, regardless of a staff person's current job responsibilities. *The MIS now allows a role to be termed*. (If a **role** is termed and then reinstated, the MIS does not keep a history of the time termed for that role.)

- a. For example, If we look at the example below, Suzanna Carlisle's (fake data) worker form, we will see that she has three roles – FRS, FSS and Supervisor.

Worker Information Form

Worker: Suzanna Carlisle

Details

Job Function

Experience

Other Info

Termination

Notes

6. Employment Date

07/23/18

Full Time Equivalent (FTE) :

Full Time (.75 to 1.0)

Hours per Week

40.00

7. Job Function

☒ **Family Support Specialist (FSS)**

Initial Start Date:

07/23/18

Start Date:

07/30/18

End Date:

☒ **Family Resource Specialist (FRS)**

Initial Start Date:

07/23/18

Start Date:

07/23/18

End Date:

☒ **Supervisor**

Initial Start Date:

07/23/18

Start Date:

08/09/18

First Event:

09/06/18

End Date:

☐ **Program Manager**

☐ **Fatherhood Advocate (FAdv)**

☐ **Direct Participant Services other than home visiting**

☐ **Community Outreach**

☐ **Fundraising**

- b. Suzanna's Program Manager (or Supervisor) has recently decided to stop her role as an FRS to help Suzanne focus on the other roles. Suzanne's supervisor can now term her FRS role in the MIS without terming the whole form. Any tasks, trainings or standards in the time frame that Suzanna was an active FRS will count for her and her program. *Going forward, after the date the FRS role was termed, she will no longer be accountable for FRS tasks, trainings or standards. (**FYI**if the role is ever reinstated, the MIS does not keep a history of the termed time period for that role.)*

Worker: Suzanna Carlisle

Details Job Function Experience Other Info Termination Notes

6. Employment Date 07/23/18 **Full Time Equivalent (FTE) :** Full Time (.75 to 1.0) **Hours per Week** 40.00

7. Job Function

☒ Family Support Specialist (FSS) **The FSS role and the Supervisor role are still active**

Initial Start Date: 07/23/18 **Start Date:** 07/30/18 **End Date:**

☒ Family Resource Specialist (FRS) **The FRS role has been termed**

Initial Start Date: 07/23/18 **Start Date:** 07/23/18 **End Date:** 03/15/19

☒ Supervisor

Initial Start Date: 07/23/18 **Start Date:** 08/09/18 **First Event:** 09/06/18 **End Date:**

5. The second new feature of the updated Worker form allow a *staff person to be “temporarily terminated”* in the MIS. This will be helpful to Supervisors who have staff on extended leave, such as maternity leave or medical leave. *It is not for use for staff members that are on extended vacations.*
- To terminate a worker for a short or long term leave on worker form, add the date of change (the date the worker will be termed) to the worker form.

Worker Information Form

Worker: Sharon VanEtten **this is a test site - all data is fake**

Details

Job Function

Experience

Other Info

Termination

Notes

Date of Change

09/09/19

enter the term date as the date of change

1. Worker Name

Sharon

VanEtten

First**Last**

- Move to the Termination Tab.

c. Enter the Term date and reason for the termination in the appropriate fields.

Worker Information Form

Worker: Sharon VanEtten

Details


Job Function

Experience

Other Info

Termination

Notes

22. Termination Date
09/09/19 

enter the date that the staff person will be leaving.

23. Termination Reason (Check all that apply)

☐ 1. Retired

☐ 2. Left for a better job

☐ 3. Moved

☐ 4. Money

☒ 5. Baby

☐ 6. Promotion

☐ 7. Disability

☐ 8. Not a good fit

☐ 9. Incarceration

☐ 10. Involuntary

☐ 11. Assigned to another program

☐ 12. Loss of funding

☐ 13. Went back to school

☐ 14. Other

enter the reason for the leave.

click submit to finalize the action

 Submit

 Cancel

- d. When the term date has been accepted, you will see this:

The screenshot shows a web interface titled "Worker Information Forms". A red-bordered box highlights a message: "Sharon VanEtten edit was successful." To the right of this box, text reads: "this lets you know the termination of this staff person is now in effect." Below the message box, there is a "Show" label followed by a dropdown menu set to "10" and the word "entries". At the bottom, there are two column headers: "First Name" and "Last Name", with a double-headed arrow between them.

- e. Be sure to **RESASSIGN ALL CASES** before entering the term date. If this is not done, you will see this validation error.

The screenshot shows a web interface titled "Worker Information Form". At the top, it says "Worker: Sharon VanEtten". Below this, a red-bordered box contains a validation error message: "Worker cannot be terminated. There are open cases. Use 'Search Cases' to locate families to be reassigned." To the right of this box, text reads: "be sure to reassign all the cases before you enter the term date." Below the message box, there are several tabs: "Details", "Job Function", "Experience", "Other Info", "Termination", and "Notes". The "Details" tab is currently selected. Below the tabs, there is a "Date of Change" label followed by a date input field containing "09/09/19" and a calendar icon. At the bottom, there is a label "1. Worker Name".

- f. To reinstate the worker at the end of the leave, choose the worker, enter the date of change (date worker will be returning) and move to the Termination Tab.

- g. Click the Reinstatement button. You will see a Reinstatement Worker box with Yes and No buttons. Choose Yes if you want the leave recorded (*meaning all trainings, HV, observations, supervisions will not be required during this time period*).

The screenshot displays the 'Worker Information Form' for Sharon VanEtten. The 'Termination' tab is selected. A modal dialog titled 'Reinstatement Worker' is open, asking 'Record leave of absence for worker?' with 'Yes' and 'No' buttons. A red box highlights the 'Reinstatement' button on the form, with a red arrow pointing to it and the text 'click on the reinstate button'. Below this, the 'Termination Reason' section lists 12 options, with '5. Baby' selected.

Worker Information Form

Worker: Sharon VanEtten

Details Job Function Experience Other Info Termination Notes

22. Termination Date

09/09/19

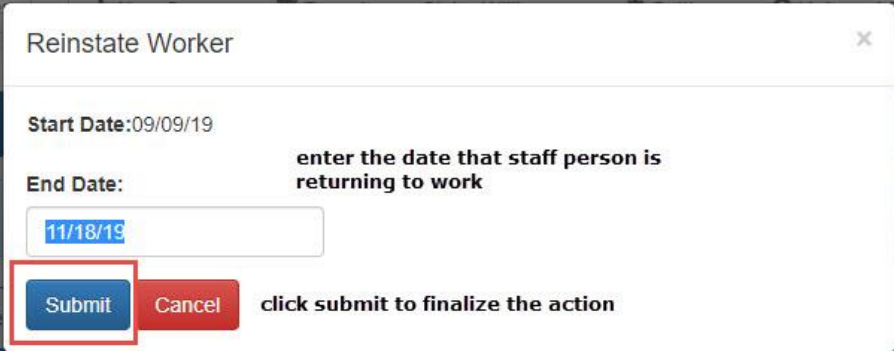
Reinstatement

click on the reinstate button

23. Termination Reason (Check all that apply)

<input type="checkbox"/> 1. Retired	<input type="checkbox"/> 8. Not a good fit
<input type="checkbox"/> 2. Left for a better job	<input type="checkbox"/> 9. Incarceration
<input type="checkbox"/> 3. Moved	<input type="checkbox"/> 10. Involuntary
<input type="checkbox"/> 4. Money	<input type="checkbox"/> 11. Assigned to another program
<input checked="" type="checkbox"/> 5. Baby	<input type="checkbox"/> 12. Loss of funding

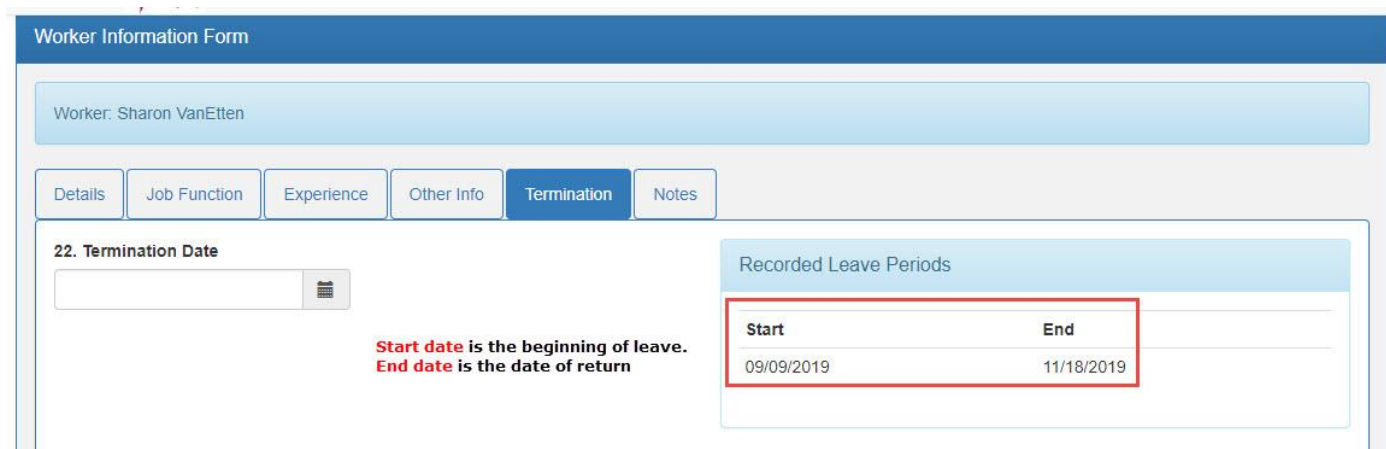
h. Add the Reinstatement Date and click the Submit button.



A dialog box titled "Reinstate Worker" with a close button (X) in the top right corner. It contains the following fields and text:

- Start Date:** 09/09/19
- End Date:** A text input field containing "11/18/19". To the right of this field is the instruction: "enter the date that staff person is returning to work".
- At the bottom, there are two buttons: "Submit" (highlighted with a red box) and "Cancel" (highlighted with a red box).
- To the right of the buttons is the instruction: "click submit to finalize the action".

6. We can see how this will look in the example below. The Termination tab of Sharon VanEtten's (fake data) worker form shows a *Recorded Leave Period* that starts on 09/09/2019 and ends on 11/18/19. This means that Sharon's active worker status was terminated on 09/09/19 and she was reinstated on 11/18/19.



A screenshot of the "Worker Information Form" for Sharon VanEtten. The form has several tabs: Details, Job Function, Experience, Other Info, Termination (selected), and Notes. The "Termination" tab is active, showing the "22. Termination Date" field and a "Recorded Leave Periods" table.

22. Termination Date

Start date is the beginning of leave.
End date is the date of return

Start	End
09/09/2019	11/18/2019

7. As always, if you have questions regarding this or any other MIS issue, please submit a *SUPPORT TICKET* or call us at 518-591-8610.

Please forward this missive to anyone who should be receiving it. Send us their email address so we can include them on the next one.

****FYI, opting out of this email will remove you from the listserv.****

Thank you!
Take care,
Your MIS Team