



MIS Newsletter

July 2010

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From the Statewide System Admin...

It may not feel like it outside, but summertime is nearing an end, and fall is just around the corner. It seems the world is always in transition. Each season has its' own beauty, and also a down side. The lush green of summer comes with potentially deadly heat and devastating floods. Fall colors and cooler temps are accompanied by earlier nightfall and soon-to-be bare trees (especially depressing for those who rake lawns without being paid). But we accept these transitions, the good with the bad, as part of the natural course of events.

So it is also with evolving software like our MIS. It is designed to grow and change as Missouri's CAA Network grows to meet the needs of a changing world, and that sometimes includes growing pains. Recent patches have improved system efficiency, incorporated a bridge to DNR's MoWAP software for Weatherization programs, cleaned up the user interface, and added dozens of user-suggested changes. Please see the MIS Resources page on the web (<http://www.communityaction.org/MIS%20Resources.aspx>) for details on each patch.

Kudos to all of you for the suggestions! Keep 'em coming, and we'll keep improving the system to meet your needs – helping you to help people and change lives!

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For more info on the MIS go to <http://www.communityaction.org/MIS.aspx>

Post-SURF 2010 Training Conference

The **SURF Training Conference** – that’s *Systems, Users, Resources, and FUNDamentals* was held July 14 – 16, 2010, at Tan-Tar-A Resort at the Lake of the Ozarks. 148 participants attended more than 30 sessions, and the ducks ruled the zoo at the Game Show! We also raised over \$850 in our fundraising raffle for the Lamb House in Camden County. Congratulations to Pat Thieman who won the laptop (donated by Adsystem), and to Mollie Rackers who won the 2-night stay at Tan-Tar-A (donated by Tan-Tar-A). We are already looking forward to next year’s edition!



Quote of the Month:

“An individual has not started living until he can rise above the narrow confines of his individualistic concerns to the broader concerns of all humanity. “

-Martin Luther King, Jr.

Featured MIS Best Practice

- **Debits/Credits on Vendor Payments:**
 - Refund information received from utility company
 - Research transaction in the MIS
 - Select appropriate program record
 - Original transaction is located on the Vendor page. The debit is connected to the original transaction. Be sure to use enter a negative number in the amount field for refunds.
 - The transaction is batched and reconciled using the same check number as the original with a prefix of 'R'. Be sure to batch debit/credit transactions separately, as the negative amount will throw off the total if included with a regular payment batch.

- Printed batch reports (see below) along with the refund information are filed in the appropriate monthly folder (client data omitted).
- A copy of the refund documentation is put in the client file for reference purposes.

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Batch Report

Vendor: Laclede Gas Co
720 Olive, Room 1205
St Louis, MO 63101

Batch Number: 2012542 Batch Date: 3/10/2010 Check No. R-17229

SSN	Name	Account No.	Location (Site)	Application Date	Dec. Date	Amount
			CAASTLC	12/7/2009	12/7/2009	(\$105.00)
			CAASTLC	11/3/2009	12/3/2009	(\$444.00)
			CAASTLC	11/4/2009	12/4/2009	(\$218.00)
Total: 3						Batch Total: \$-767.00
Total Number of Batches: 1						Running Total: \$-767.00

MIS Web Resources

- **MIS page on the MACA Web Site:** <http://www.communityaction.org/MIS.aspx>
- **Patch Update and change control documents** are located on the MIS Resources page of the MACA Web site. This includes each change implemented in any patch (a separate PDF file for each recent patch), and the status of changes submitted from the network: <http://www.communityaction.org/MIS%20Resources.aspx>
- **HOW TO Documents** page on MACA's website. Check frequently for new postings. The following is a direct link to the HOW TO Documents page: http://www.communityaction.org/files/MIS/HOW_TO_Documents_Combined_3_11_10.pdf
- **Adstech Published Manuals:** <http://www.communityaction.org/Manuals.aspx>
- **Frequently Asked Questions (FAQ):** The following is a direct link to the FAQ page on the MACA Help Desk site (no login required). This site currently has information posted under 6 categories: Assessment Script, Printing, Reports, Agency Admin, General FAQs and Error Messages. <https://caamis.helpdeskconnect.com/?cmd=faq&sid=>

