

# Intake Solutions Demo

Quarterly Stakeholder Forum

April 11, 2017



CWDS / Child Welfare Digital Services

# Agenda

- Our Goals
- The big picture: The past, where we stand, and what is next
- Present: Solutions Demo
- Future: Product Roadmap

**Goals**

# Why are we building this service?



## Child Welfare Goals

## Impact of our service

## Features to deliver value

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### Reduce recurring abuse

- Reduce meaningless and corrupt data
- Display involvement history

- Improved search to reduce dupes
  - Simpler data entry for better data capture
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### More timely response

- Efficient referral creation
- Flexible workflow

- Complete referral on one page
  - Simpler person search to reduce time spent
- 

### Deliver appropriate services

- Record preventative services
- Display history of services

- Ability to save report without creating referral (“screening”)

# Hotline

What it is & where we are right now

# Hotline: Initial Features

USER  
JOURNEY



RECEIVE  
REPORT



FIND PEOPLE



REFINE INFORMATION



EVALUATE









DETERMINE RESPONSE
















APPROVAL

# Hotline: Initial Features

USER JOURNEY	 RECEIVE REPORT	 FIND PEOPLE	 REFINE INFORMATION	 EVALUATE	 DETERMINE RESPONSE	 APPROVAL
FEATURES	<ul style="list-style-type: none"><li>• Screener Information</li><li>• Screener Narrative</li></ul>	<ul style="list-style-type: none"><li>• Person Search</li></ul>	<ul style="list-style-type: none"><li>• Person Demographics</li><li>• Reporting Party</li></ul>	<ul style="list-style-type: none"><li>• Allegations</li><li>• Incident Information</li></ul>	<ul style="list-style-type: none"><li>• Decision and Response Time</li><li>• Cross Report</li></ul>	<ul style="list-style-type: none"><li>• Submit a Referral</li><li>• Sandbox</li></ul>



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STATUS	 <b>READY IN SANDBOX</b>	 <b>DELIVERED TO PRODUCTION</b> (COUNTY REPS)	 <b>READY IN SANDBOX</b>	 <b>READY IN SANDBOX</b>	 <b>READY IN SANDBOX</b>	 <b>READY IN SANDBOX</b> <ul style="list-style-type: none"> <li>• Sandbox</li> </ul>  <b>DEVELOPMENT IN PROGRESS</b>

# What the heck is a “Sandbox”

Adoption  
Utilization

Ready to Use



Product  
Design &  
Development

Ready to View

Prod

Dev

Sandbox

# The Present

Demo

# Create a new person

## Demo



**SEARCH**

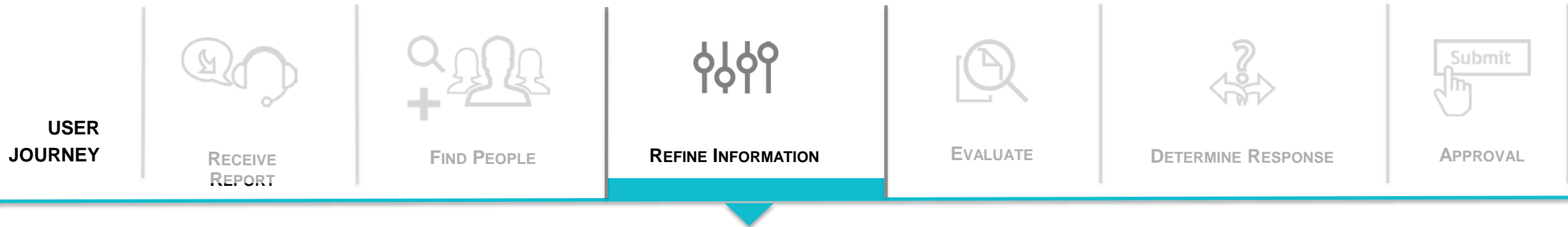
Search for any person (Children, parents, collaterals, reporters, alleged perpetrators...)

Name

- Intuitive placement in workflow
- Screeners engage with search first to reduce duplicates

# Roles on a screening

## Demo



**JOHN SMITH**

**First Name**

**Role**


Victim  
Perpetrator  
Mandated Reporter  
Non-mandated Reporter  
Anonymous Reporter


- Indicate different types of reporters
- Easy to automatically fill in allegations, history features
- Person can have multiple roles
- Person can have different roles on different reports


# Edit demographics


## Demo



**JOHN SMITH** 

	<b>Name</b> John Smith	<b>Date of birth</b> 1956-04-20
	<b>Gender</b> Male	<b>Social security number</b> 123-45-6789

**Date of birth**  
04/20/1956 

**Gender**  
Male 

**Social security number**  
123-45-6789

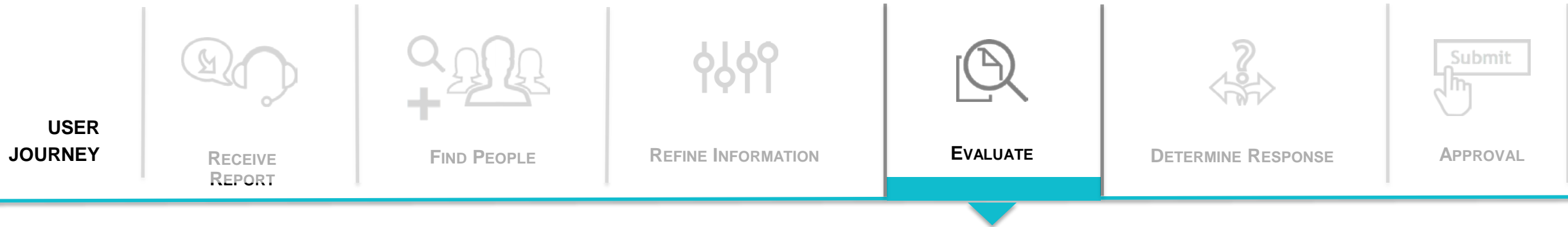
[+ Add new address](#)

**Save** **Cancel**

- Edit demographics directly in screening
- Protect data quality through versioning in back end
- Preserve snapshot of “what was known at the time” of the screening

# Allegations

## Demo



- Auto-populated alleged victims and perpetrators reduces complexity for users
- Screeners can add multiple allegations to each pair of victim and perpetrator
- Display breaks down allegations for quick disposition by investigators.

ALLEGATIONS		
Alleged Victim/Children	Alleged Perpetrator	Allegation(s)
<a href="#">Aubrey Campbell</a>	<a href="#">Christopher Campbell</a>	<input checked="" type="checkbox"/> General Neglect <input checked="" type="checkbox"/> Physical Abuse <span>x v</span>
	<a href="#">Pamela Campbell</a>	<input checked="" type="checkbox"/> General Neglect <span>x v</span>
	<a href="#">Leo Chapman</a>	<input checked="" type="checkbox"/> Sexual Abuse <span>x v</span>
<a href="#">Jake Campbell</a>	<a href="#">Christopher Campbell</a>	<input checked="" type="checkbox"/> General Neglect <span>x v</span>
	<a href="#">Pamela Campbell</a>	<input checked="" type="checkbox"/> General Neglect <span>x v</span>
	<a href="#">Leo Chapman</a>	<input type="text"/> <span>x v</span>

# Cross Report

## Demo



- Simple checklist to capture required cross-reports
- Build on the strength of the existing system's quick pick lists
- Avoiding unnecessary complexity and redundant data entry until then

**CROSS REPORT**

**Cross reported to**

District attorney

Department of justice

Law enforcement

Licensing

California State DoJ

Sacramento Police Precinct #55

**Save** **Cancel**



# Decision and Response Time

## Demo



- Series of fields follows the screener's natural decision process
- Keeps the user focused on only the necessary considerations
- Options allow for some flexibility in county practices

### DECISION

<b>Decision</b>	<b>Response time</b>
<input type="text" value="Promote to referral"/>	<input type="text"/>
<b>Additional information</b>	<input type="text" value="Immediate"/> <input type="text" value="3 Days"/> <input type="text" value="5 Days"/> <input type="text" value="10 Days"/>

# Demo

# The Future

Research, design & product roadmap

# What's coming next sprint (or two)?

## **New Features:**

- History of Involvement
- Expand on a person's demographics
- Worker Safety Alerts

## **Team progress:**

- Saving a referral to legacy
- Designs for supervisor review














# Feedback Schedule

**We are scheduling site visits through July, to include training core county representatives in usability testing.**








## **Why?**

- Expand our reach and the amount of data we can collect
- Increase design and research skills in the organization
- **More frequent and regular usability testing**









# Intake Hotline product roadmap

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 <b>AND THEN WHAT?</b>	<ul style="list-style-type: none"> <li>• Upload files</li> <li>• Auto-fill basic info</li> <li>• Pull info from the Narrative</li> </ul>	<ul style="list-style-type: none"> <li>• Prioritize results by relationships</li> <li>• Add photos of people</li> </ul>	<ul style="list-style-type: none"> <li>• ICWA</li> <li>• Custody arrangements</li> <li>• Child location</li> <li>• Relationship Genogram</li> </ul>	<ul style="list-style-type: none"> <li>• Pull old case/referral from legacy</li> <li>• SDM Integration</li> </ul>	<ul style="list-style-type: none"> <li>• Notify other workers</li> <li>• Notify mandated reporters</li> <li>• Generate SCAR, etc.</li> </ul>	<ul style="list-style-type: none"> <li>• Duplicate detection</li> <li>• Caseload dashboard w/ notifications</li> </ul>



**Thank you**

