

INTERSTATE COMMISSION FOR JUVENILES

Technology Committee Meeting Minutes

June 14, 2022
2:00 p.m. ET
Via Zoom



Voting Members in Attendance:

1. Kellianne Torres (IA), Designee, Chair
2. Judy Miller (AR), Designee
3. Jefferson Regis (DC), Commissioner
4. Roy Curtis (ME), Commissioner
5. Felicia Dauway (SC), Commissioner

Non-Voting Members in Attendance:

1. Holly Kassube (IL)
2. Nita Wright (IN)
3. Abbie Christian (NE)
4. Kelly Palmateer (NY)
5. Gladys Olivares (NV)
6. Brandon Schimelpfenig (WY)

Members Not in Attendance:

1. Jacey Rader (NE), Commissioner
2. Rachel Johnson (NC)

Guest in Attendance:

1. Natalie Dalton (VA)

National Office Staff in Attendance:

1. MaryLee Underwood, Executive Director
2. Emma Goode, Logistics and Administrative Specialist
3. Joe Johnson, Systems Project Manager
4. Amanee Cabbagestalk, Training and Administrative Specialist

Call to Order

Technology Committee Chair K. Torres (IA) called the meeting to order at 2:00 p.m. ET.

Roll Call

Amanee Cabbagestalk, National Office staff, called the roll and a quorum was established.

Agenda

F. Dauway (SC) made a motion to approve the agenda. J. Regis (DC) seconded. The motion carried.

Minutes

J. Miller (AR) made a motion to approve the May 10, 2022 meeting minutes.

R. Curtis (ME) seconded. The motion carried.

Discussion

Executive Committee Update

- Technology Committee Chair K. Torres (IA) provided an update regarding the items recommended to the Executive Committee. The Executive Committee did approve the amended ICJ Administrative Policy: Information System Modifications ([ICJ 2020-02](#)). The Executive Committee also approved the amendments to ICJ Administrative Policy: Forms Responsibility ([ICJ 2014-01](#)).
- The Executive Committee referred the draft “*Best Practice on Direct Entry of Data into UNITY*” to the Training Committee for review, and expects that it will be returned to the Executive Committee in June for final approval.

UNITY Enhancement Recommendations from the Enhancements Subcommittee

UNITY Enhancements Subcommittee

- Chair Torres (IA) acknowledged the six (6) UNITY Enhancements Subcommittee members and expressed her appreciation to all attending today’s meeting. In addition to Chair Torres, the members are:
 - Abbie Christian (NE), ICJ Deputy Compact Administrator;
 - Natalie Dalton (VA), ICJ Commissioner;
 - Holly Kassube (IL), ICJ Probation Deputy Compact Administrator;
 - Nita Wright (IN), ICJ Deputy Compact Administrator; and
 - Kelly Palmateer (NY), ICJ Deputy Compact Administrator.

Enhancements Subcommittee Process to Date

- Chair Torres (IA) began with an overview of the UNITY Enhancements process.
- The UNITY Enhancement requests were entered online via a SmartSheet beginning June 2021, with a total of 105 requests submitted.
- Beginning November 2021, the Enhancements Subcommittee began an audit and analysis of the 105 submissions using a 5-point scoring methodology. Based upon the scoring assessment, a group of enhancements were selected for FY 2023 release.
- Next, there was a re-analysis culminating into the nine (9) enhancement packaged recommendations to be presented.

UNITY Enhancements Timeline and Next Steps

- Chair Torres (IA) presented the timeline and next steps regarding the enhancements.
 - May 2022 Finalized the FY 2023 Enhancements
 - June 2022 Optimum Quote received
 - June 2022 UNITY Enhancements Subcommittee presents recommendations to the Technology Committee. The Committee’s recommendations will be forwarded to the Executive Committee for approval.
 - October 2022 Announce at the 2022 Annual Business Meeting
 - August 2022 – March 2023 Development and testing of the approved enhancements.
 - March 2023 – May 2023

- June 2023 Release date to be determined

UNITY Enhancement Packages

- Chair Torres (IA) explained that the enhancements were categorized into four (4) major functional areas:
 1. Master Tasks Lists
 2. Transfer of Supervision (TOS) Workflows
 3. Return Workflow
 4. Design Functionality
- Chair Torres (IA) and Abbie Christian (NE) presented a total of nine (9) UNITY enhancement packages. Each of the packages, presented as Package A thru Package I, included an overview of:
 - the UNITY Functional Area;
 - the User Roles Impacted;
 - the Summary of Enhancement;
 - the Justification of the change; and
 - the Enhancement Cost.
- The presentation of each package included written details and screen shot images of the proposed enhancements to provide the committee a thorough operational understanding of the changes.

Package A: Master Task List

- A. Christian (NE) provided an overview of Package A which falls under the category Master Task List (MTL).
- The enhancement involves restructuring and enhancement of the “task lists” in the Master Task List (MTL), the Interstate Commission Juvenile Office MTL (ICJO MTL), and the addition of a Probation/Parole Supervisor MTL (JPS MTL). The enhancement included the addition of five (5) new filters and the revision of one (1) filter. The enhancement also includes a change in the naming convention on return cases and the addition of a case reassignment functionality. J. Miller (AR) asked if the lists would change for Model 3 states, i.e., those in which only ICJO staff use UNITY. A. Christian (NE) affirmed that there would be no impact.

Package B: Transfer of Supervision (TOS) Workflow

- K. Torres (IA) provided an overview of Package B which falls under functional categories TOS workflow and case document design and functionality.
- The enhancement involves an increased data field flexibility of “Court Cases” for Sending States; enhanced feature functionality in the “Case Documents” section; and enhanced and streamlined functionality of the TOS task grid design.
- J. Miller (AR) asked why the change is being recommended. K. Torres (IA) explained, in the current design, the task lists get lengthy in transfer of supervision cases. The change would allow unused task lines to be hidden. It would also give users the ability to edit names of files for better descriptor labels.
- J. Miller (AR) noted that her assistant completes information in UNITY, and asked whose name would be auto-generated in the “ICJ only information” section of the forms. A. Christian (NE) clarified the name would be the UNITY user who is logged in and saves the information. She also noted that selecting the printer icon button twice allows insertion of a different name.

- K. Torres (IA) explained the new design for task list reordering would automatically arrange the TOS information into a chronological order. Additionally, the enhancement includes a departure task information line wherein the receiving state will be required to acknowledge they have received the ICJ Form V departure information.

Package C: Navigation Design Functionality

- A. Christian (NE) provided an overview of Package C which includes one very important change under the category of navigation design functionality.
- The enhancement would allow a floating navigation panel on the left of the screen. The floating panel makes pertinent juvenile profile and case information visible throughout the case, and reduces the need to go to other areas in UNITY to find the pertinent information. This new feature is a function available only on desktop applications.
- J. Miller (AR) asked if the panel could be closed. J. Johnson, Project Manager, demonstrated that the left panel could be closed by clicking the "<<" icon on the present navigation to hide and the ">>" icon to unhide.

Package D: Case Communication Design Functionality

- K. Torres (IA) provided an overview of Package D which falls under design functionality area.
- The enhancement involves a revision on the "Case Communication" section functionality to require the user to select a recipient for a message and add identifying information to the list of recipients to include state, role, and probation or parole.
- J. Miller (AR) commented, messages already require the selection of a recipient.
- K. Torres (IA) explained the enhancement ensures the message goes to the correct person. When entering a new message and clicking "Save," users will be prompted to select recipient(s) for the communication.
- J. Miller (AR) commented that she submitted an enhancement request to have the functionality to print the communication messages. J. Johnson, Project Manager, affirmed that the request was reviewed and would remain for consideration in the next round. It was not included in Group 1 as there is currently a way to print messages. He agreed to contact Judy Miller (AR) after the meeting to demonstrate the option.

Package E: Return Workflow

- K. Torres (IA) provided an overview of Package E which falls under return workflow.
- The enhancement involves the addition of date/time fields to task "Juvenile has returned to Home/Demanding State - Return Case Closed." This would allow for accurate documentation of when the juvenile is picked-up from the Holding State and returned to the Home/Demanding State.
- Also, fields will be edited to allow for selection of "abuse/neglect alleged" and entry of human trafficking information throughout the life of a return case. An "unknown" option will be added to the drop-down list related to human trafficking.
- J. Miller (AR) asked if users will be required to enter a time. A. Christian (NE) affirmed that only the date is required.
- R. Curtis (ME) asked the purpose of "unknown" in the dropdown. J. Johnson, Project Manager, noted there have been many discussions regarding human

trafficking over the years and an interest by the Commission to collect tangible data regarding human trafficking. A. Christian (NE) added that “unknown” was the best way to address and encourage additional use of the field without making it mandatory. R. Curtis (ME) added although not a requirement, answering the drop down would be a good “best practice” to administer. F. Dauway (SC) expressed her appreciation and value of this enhancement.

Package F: TOS Event

- K. Torres (IA) provided an overview of Package F which falls under the functional area of a transfer of supervision (TOS) event.
- The enhancement involves collaboration of the travel plan detail during the retaking phase of a transfer of supervision. The collaborative ability on travel plan already exists in a return case and this enhancement would mirror the functionality in TOS cases.
- J. Miller (AR) questioned whether this change is necessary, since the information is already on the Form X closure notice. A. Christian (NE) explained the enhancement is not creating a new work flow. The enhancement is an add-on to an existing workflow to allow both states the opportunity to enter pertinent information in UNITY when retaking a juvenile.

Package G: TOS Workflow

- A. Christian (NE) provided an overview of Package G which falls under the functional area TOS workflow area.
- The enhancement would create a new TOS workflow for probation, non-sex-related offense cases to allow the UNITY user to select whether the TOS workflow is started with the Travel Permit or with the complete referral.
- The new TOS workflow option would allow the sending state to provide notice of a forthcoming transfer request to the receiving state using a travel permit in cases where not all mandatory referral documents are yet available.
- R. Curtis (ME) asked for further clarification. A. Christian (NE) explained the enhancement allows the option to address when juveniles are already in the receiving state at the time of the offense or disposition. However, if the juvenile is truly testing a residence, then that would be the appropriate selection. She added that a 30-day time frame is not prompted, as this is not a rules-based change.
- The subcommittee members chatted their support for this package.

Package H: Design Functionality

- K. Torres (IA) provided an overview of Package H which falls under the design functionality area.
- The enhancement revises verbiage on the task line items to more accurately reflect all of the actions taken rather than selecting “approve” only. Also, it will include icon image updates to provide better visuals. She highlighted each of the task lines and verbiage changes associated with the icons.
- J. Johnson, Project Manager, added that the verbiage and icons would be standardized across the three (3) different ICJ case types.

Package I: TOS Workflow – Failed Supervision

- A. Christian (NE) provided an overview of Package I which falls under the design functionality area.

- The enhancement involves the modification of the failed supervision workflow event selection and the criteria process to properly align with Rule 5-103 (reporting juvenile non-compliance, failed supervision and retaking).
- A legal interpretation of Rule 5-103 was requested and acquired before tackling this enhancement request regarding whether a legal guardian must be present in the sending state.
- The workflow will be revised to align to the ICJ Rules and improve critical information steps.
- In summary, in Rule 5-103, paragraph 4, sub sections a., b., and c. provide separate criteria for establishing that supervision has failed. Currently in UNITY, the user must mark either “over the age of majority” or “legal guardian” in order to move forward. This essentially imposes one of the requirements from section a. onto sections b. and c. With the enhancement/correction, the system will allow UNITY users to move forward in all ways allowed by the rules.

Enhancement Package Recommendations

- Chair Torres (IA) presented the cost of each of the packages presented as outlined below. She explained that the maintenance and support cost may be a little less as negotiations with the vendor continue.

Pkg A: Master Task List	\$ 43,625
Pkg B: TOS Workflow (Court Case, Case Docs, Task Grid)	\$ 71,375
Pkg C: Navigation Design Functionality	\$ 18,000
Pkg D: Case Communications Design Functionality	\$ 33,000
Pkg E: Return Workflow (Return Date, Human Trafficking)	\$ 11,500
Pkg F: TOS Event – Retaking Travel Plan	\$ 4,500
Pkg G: TOS Workflow	\$ 18,000
Pkg H: Task Line Verbiage & Icons	\$ 22,500
Pkg I: Failed Supervision Return Workflow	<u>\$ 4,625</u>
Sub-Total	\$227,125
Maintenance & Support	<u>\$ 45,425</u>
TOTAL	<u><u>\$272,550</u></u>

- Chair Torres presented each enhancement package independently for a recommendation.
- **J. Miller (AR) made a motion to recommend to the Executive Committee for final approval of Package A: Master Task List. R. Curtis (ME) seconded. The motion passed unanimously.**
- **J. Regis (DC) made a motion to recommend to the Executive Committee for final approval of Pkg B: TOS Workflow (Court Case, Case Docs, Task Grid). F. Dauway (SC) seconded. The motion passed unanimously.**
- **J. Miller (AR) made a motion to recommend to the Executive Committee for final approval of Pkg C: Navigation Design Functionality. R. Curtis (ME) seconded. The motion passed unanimously.**
- **J. Miller (AR) made a motion to recommend to the Executive Committee for final approval of Pkg D: Case Communications Design Functionality. R. Curtis (ME) seconded. The motion passed unanimously.**

- **F. Dauway (SC) made a motion to recommend to the Executive Committee for final approval of Pkg E: Return Workflow (Return Date, Human Trafficking). J. Regis (DC) seconded. The motion passed unanimously.**
- **J. Miller (AR) made a motion to recommend to the Executive Committee for final approval of Pkg F: TOS Event – Retaking Travel Plan. R. Curtis (ME) seconded. The motion passed unanimously.**
- **R. Curtis (ME) made a motion to recommend to the Executive Committee for final approval of Pkg G: TOS Workflow. F. Dauway (SC) seconded. The motion passed unanimously.**
- **J. Miller (AR) made a motion to recommend to the Executive Committee for final approval Pkg H: Task Line Verbiage & Icons. J Regis (DC) seconded. The motion passed unanimously.**
- **F. Dauway (SC) made a motion to recommend to the Executive Committee for final approval Pkg I: Failed Supervision Return Workflow. J. Miller (AR) seconded. The motion passed unanimously.**
- **Chair Torres (IA) and A. Christian (NE) will present the enhancement recommendations to the ICJ Executive Committee at their June meeting.**

Old Business

UNITY Support and Bug Fix Updates

- **Joe Johnson, Project Manager, updated that Optimum Technology continues to work through support requests. On June 29, there will be a release of several repaired elements unique to state specific cases. This release is limited to specific cases and not to be confused with a nationwide release.**

New Business

There was no new business.

Adjourn

R. Curtis (ME) made motion to adjourn. F. Dauway (SC) seconded. Chair Torres adjourned the meeting by acclamation without objection at 3:21 p.m. ET.