

## JOB AID: ENHANCED FUNCTIONALITY



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## JOB AID: ENHANCED FUNCTIONALITY



### Redesigned Dashboard/Landing Page

Upon login, users will be navigated to the Dashboard where they can view their Assigned Workload, Unassigned Workload, Approval Requests etc. based on their role. To switch views, the user can click any of the tabs on the Dashboard screen (Assigned Workload, Unassigned Workload, Approval Inbox, My Requests).

**Assigned Workload:** This shows the referrals assigned to a user. Based on user's role they will be able to see another user's workload. Using Program Area, Unit and Worker dropdowns above the grid.

**Unassigned Workload:** The referrals that are not assigned to any worker but rather just assigned to either unit or program area will land in this tab. This tab will be visible only to Supervisors, Clinical Managers, RODs, and Specialists.

To view the referral assigned to a unit within a Program Area, select the corresponding unit from the Unit dropdown.

To view the referral assigned to a program area (without any unit assignment), select the Unassigned Inbox in the Unit dropdown.

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**Approval Inbox:** This tab will also be visible only to Supervisors, Clinical Managers, RODs and Specialists. This is where all the approvals sent to them will reside. Users will have the ability to filter the approval inbox by Unit and Approval Type.

**My Requests:** This tab will display all the requests sent for approval by the logged in user. The requests that are approved will stay on this tab for 10 days and then will be removed after that.

Commented [CP1]: @Goodwin, Caroline if the target audience of this document is all INV users then they don't see Call screening Review tab. Can we take a screenshot from UAT with 'Emily Fries' as logged in user?

### Assigned Workload Enhancements

In KIDSTOO, the Assigned Workload Dashboard includes additional column names such as Family Name, Parent Name, Date Assigned, Intake Date, Days Remaining (with 15 Days Remaining indicator), Day 60 Date, Family Worker Name, Admin Worker Name, Individual Count, etc.

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**Assigned Workload**

Home - Dashboard

Assigned Workload (9) | Unassigned Workload (11) | Approval Inbox (86) | My Requests (5)

**Filters**

Program Area: Bruce Noel - INTAKE | Unit: Emily Fries - INTAKE 1 36 | Worker Name: Emily Fries | Type: All

**Investigation (9)**

Indicates 15 days remain before day 60

ID	Referral Type	Family Name	Parent Name	Date Assigned	Intake Date	Days Remaining	Day 60 Date	Family Worker Name	Admin Worker Name	Individual Count
764859	GPS	name client	CLIENT FIRST NAME	06/11/2024	06/10/2024	57	08/09/2024	Emily Fries		2
764461	GPS	astend		05/22/2024	05/22/2024	36	07/21/2024	Emily Fries		2

Commented [CP2]: Can we change this screenshot also, please?

Commented [CP3R2]: Also since these are INV referrals we are talking about, let's take the screenshot from that grid.

In Legacy KIDS, the column names only include New, ID, Type, Responsibility, Referral Type, Name, Client, Date Assigned, Open Date, Worker Name, and Family Case Type.

**Department of Human Services**  
Allegheny County, Pennsylvania

**kids**

Workload List

Case / Intake / Other Listing

Program Area: Bruce Noel - INTAKE

Unit: Fries, Emily - INTAKE 1 36

Worker: Emily Fries

New	ID	Type	Responsibility	Referral Type	Name	Client	Date Assigned	Open Date	Worker Name	Family Case Type
Y	764859	INV	Family	GPS	name client		06/11/2024	06/10/2024	Emily Fries	
Y	764461	INV	Family	GPS	astend		05/22/2024	05/22/2024	Emily Fries	
Y	764335	INV	Administrative	CPS	Shalash		05/23/2024	05/01/2024	Emily Fries	
Y	764327	INV	Family	GPS	TRAINING 2		05/15/2024	05/15/2024	Emily Fries	
Y	764293	INV	Family	CPS	TRAINING MATERIALS		05/13/2024	05/13/2024	Emily Fries	
Y	764277	INV	Administrative	CPS	Bug 2353 retest		05/12/2024	05/12/2024	Emily Fries	
Y	83193	CAS	Family		ast		05/11/2024	05/01/2024	Emily Fries	Family Services

Commented [CP4R2]: We can then call out enhancements in INV grid - Family Name, Parent Name, Days Remaining (with 15 days remaining indicator), Day 60 Date, Family Worker Name, Admin Worker Name, Individual Count etc. You can find these details in the UST for INV dashboard.

Commented [CP5]: Take this screenshot also from Emily's login in legacy.

## Assign/Transfer Functionality

Ability to End-Date Admin Assignments, Transfer Summary Popout (on dashboard)

**Investigation (9)**

Indicates 15 days remain before day 60

Transfer Summary | Reset | Contacts | Assign/Transfer

ID	Referral Type	Family Name	Parent Name	Date Assigned	Intake Date	Days Remaining	Day 60 Date	Family Worker Name	Admin Worker Name	Individual Count
764859	GPS	name client	Client First Name	06/11/2024	06/10/2024	49	08/09/2024	Emily Fries		2
764461	GPS	astend	JOB EBOTCZ	05/22/2024	05/22/2024	30	07/21/2024	Emily Fries		2

1. Select a referral from the Dashboard using the checkbox.

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2. Click the Assign/Transfer button in the top right of the grid.

3. Select the Assignment Type, Program Area, Unit, and Worker.

4. Click the Save button.

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5. A confirmation popup will appear. To confirm, click the Yes button.

**Assign / Transfer Details**

Assign/Transfer (Referral: 764859)

Program Area	Unit	Worker	Responsibility	Start Date
INTAKE	Emily Fries - INTAKE 1	Stephanie Svobos	Family	06/21/2024

20 << < 1 of 1 > >>

**New Assignment**

Assignment Type: ☒ Family ☐ Administrative

\*Program Area Required:  Unit:  Worker:

Summary:

6. The Assign/Transfer Details popup will remain open where users can view the current assignment and assignment history.
7. To go back to the Dashboard, users click the Close button.

**Assigned Workload**

Home - Dashboard

Assigned Workload (17) My Requests

**Filters**

Program Area:  Unit:  Worker Name:  Type:

**Call Screening (1)**

**Investigation (16)**

Indicates 15 days remain before day 60

ID	Referral Type	Family Name	Parent Name	Date Assigned	Intake Date	Days Remaining	Day 60 Date	Family Worker Name	Admin Worker Name	Individual Count	
764859	GPS	name client	Client First Name	06/21/2024	06/10/2024	49	08/09/2024	Stephanie Svobos		2	Show

8. The assigned worker will then have the referral in their Assigned Workload with a New tag in the Date Assigned column.
9. Users will have the ability to make multiple Admin assignments. And creating a new admin assignment will not auto-end date previous admin assignment.
10. Users can manually end date the Admin assignment using End Assignment button within grid for admin assignments.

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Assign / Transfer Details

Program Area	Unit	Worker	Responsibility	Start Date	
INTAKE	Emily Fries - INTAKE 1	Adebimpe Akitoye	Administrative	07/11/2024	End Assignment
INTAKE	Cathy Long - INTAKE 7		Family	07/11/2024	

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New Assignment

Assignment Type

☒ Family ☐ Administrative

\*Program Area Required

Bruce Noel - INTAKE

Unit

Emily Fries - INTAKE 1 - INTAKE

Worker

-- Select an option --

Summary

Restrict Functionality

Users can restrict referrals from the Dashboard.

Assigned Workload

Assigned Workload (142)

Call Screening Review

Unassigned Workload

Approval Inbox

My Requests

Filters

Program Area

Bruce Noel - INTAKE

Unit

Emily Fries - INTAKE 1 36

Worker Name

Amber Manning

Type

All

Reset

Call Screening (51)

Investigation (91)

Indicates 15 days remain before day 60

Transfer Summary

Restrict

Contacts

Assign/Transfer

ID	Referral Type	Family Name	Parent Name	Date Assigned	Intake Date	Days Remaining	Exp 60 Date	Family Worker Name	Admin Worker Name	Individual Count	
<input type="checkbox"/> 764571	GPS	CHRIS SAU Referral	Bailey Just2AK	05/28/2024	04/18/2024	20	06/17/2024	Amber Manning		7	Show
<input type="checkbox"/> 764598	GPS	adney	KRISTEN RAYMOND	05/28/2024	08/16/2023	Overdue	10/17/2023	Amber Manning		3	Show
<input type="checkbox"/> 764587	GPS	test	NEW PERPE	05/28/2024	05/14/2024	46	07/13/2024	Amber Manning		2	Show
<input checked="" type="checkbox"/> 764584	GPS	test		05/28/2024	05/26/2024	60	07/27/2024	Amber Manning		2	Show
<input type="checkbox"/> 764563	GPS	Test Container	LPDOFUBUNJUMPO	05/28/2024	05/28/2024	60	07/27/2024	Amber Manning		2	Show

1. The user selects a referral using the checkboxes in the leftmost column.

2. The user then clicks the Restrict button and the below Restriction/Unrestriction Reason box appears.

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Investigation (91)  
Indicates 15 days remain before day 60

Transfer Summary

Restrict

Contacts

Assign/Transfer

Restriction / Unrestriction Reason *Required*

test

Restrict

Cancel

ID	Referral Type	Family Name	Parent Name	Date Assigned	Intake Date	Days Remaining	Day 60 Date	Family Worker Name	Admin Worker Name	Individual Count	
764571	GPS	CHRIS SAI Referral	Bailey Jurczak	05/28/2024	04/18/2024	20	06/11/2024	Amber Manning		7	Show
764568	GPS	admay	KRISTEN RAYMOND	05/28/2024	08/18/2023	Overdue	10/17/2023	Amber Manning		3	Show
764567	GPS	test	NEW PERPE	05/28/2024	05/14/2024	46	07/13/2024	Amber Manning		2	Show
764564	GPS	test		05/28/2024	05/28/2024	60	07/27/2024	Amber Manning		2	Show

3. The user puts a restriction reason in the textbox and then clicks the Restrict button.

Investigation (91)  
Indicates 15 days remain before day 60

Transfer Summary

Restrict

Contacts

Assign/Transfer

ID	Referral Type	Family Name	Parent Name	Date Assigned	Intake Date	Days Remaining	Day 60 Date	Family Worker Name	Admin Worker Name	Individual Count	
764571	GPS	CHRIS SAI Referral	Bailey Jurczak	05/28/2024	04/18/2024	20	06/11/2024	Amber Manning		7	Show
764568	GPS	admay	KRISTEN RAYMOND	05/28/2024	08/18/2023	Overdue	10/17/2023	Amber Manning		3	Show
764567	GPS	test	NEW PERPE	05/28/2024	05/14/2024	46	07/13/2024	Amber Manning		2	Show
764564	GPS	test		05/28/2024	05/28/2024	60	07/27/2024	Amber Manning		2	Show

4. A Restricted tag will then appear below the referral ID in the grid.

Putting Referral in Focus from Dashboard

Once the user navigates to the Dashboard, the user can see the list of referrals getting displayed in the grid. To select any referral and view it the user can select the show button which is present beside each referral in the grid.

Transfer Summary

Restrict

Contacts

Assign/Transfer

ID	Referral Type	Family Name	Parent Name	Date Assigned	Intake Date	Family Worker Name	Admin Worker Name	Individual Count	Field Screening Assigned?	
794927	CPS/GPS	OutcomeApprovalTesting	TEST ADULT	1/16/2024	1/16/2024	Amber Manning		2	No	Show
794923	CPS/GPS	testing	Test Parent	1/16/2024	1/10/2024	Alison Mullinary	Alison Mullinary Amber Manning	2	No	Show
794921			Shannon Marsara-Wadley	1/10/2024	5/9/2019	Amber Manning		5	No	Show
794920		qwdsdqwdsq		1/10/2024	1/10/2024	Amber Manning		0	No	Show
794919		test		1/8/2024	1/8/2024	Amber Manning		1	No	Show
794918			Shannon Marsara-Wadley	1/5/2024	5/9/2019	Amber Manning		5	No	Show

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## Left Navigation – Additional Information

The Left Navigation gives users a recommended screen flow, so they know which screens they have or have not completed. Additionally, users are able to move between screens without using dropdowns. Within the left navigation there is a section labeled **Additional Information**. It is collapsed by default but can be expanded by clicking the arrow. The menu will then appear, and users can use any of the links below. The selected link will open in a new window.

Commented [CP6]: @Goodwin, Caroline Can we add some details about left navigation itself first? It might be there in our CS documents. If not, we can write 2-3 lines about how left navigations makes it easier to navigate between screens and provides a structure to the workflow.

Field Screening Research

FS/OC Contacts

FS/OC Photos

FS/OC Universal Assessment

**Additional Information**

Incident Address

☒ In State ☐ Out of State ☐ Foreign

Type Address to Search

Business Name

Location Detail

Phone 1 Type: -- Select an option --

Phone 1 No

Phone 1 Ext

Phone 2 Type: -- Select an option --

Phone 2 No

Phone 2 Ext

Phone 3 Type: -- Select an option --

Phone 3 No

Phone 3 Ext

Household Address

☒ In State ☐ Out of State ☐ Foreign

Type Address to Search

☐ Same As Incident Address ☐ Unknown Address ☐ Homeless

To view the options present under the Collapsed View, click on the arrow to open and view the options available.

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Additional Information

CIU

Courts

Services

Shelter

Missing & Runaway Youth

Reports

Record Review

Supervisor Log

CWIS Data Correction

## Search – Universal and Advanced

There are two main ways for users to complete a search. At this stage, users are only able to search for Referrals and Clients but as functionality is added to KIDSTOO, there will be more options available. At the top of the screen there is Universal Search which is the quickest and easiest search option.

All

Q d I

All(20)

Referral(10)

Client(10)

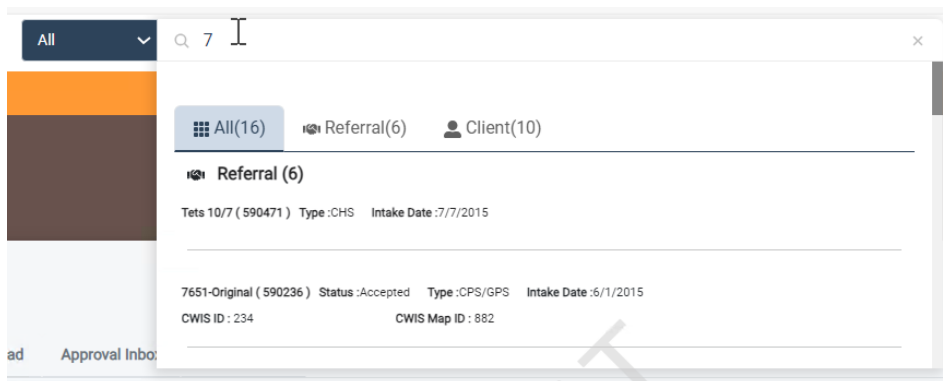
Referral (10)

Dadey ( 763243 ) Status :Screened Out Type :CPS/GPS Intake Date :4/3/2024  
CWIS ID : 20063107 CWIS Map ID : 202751

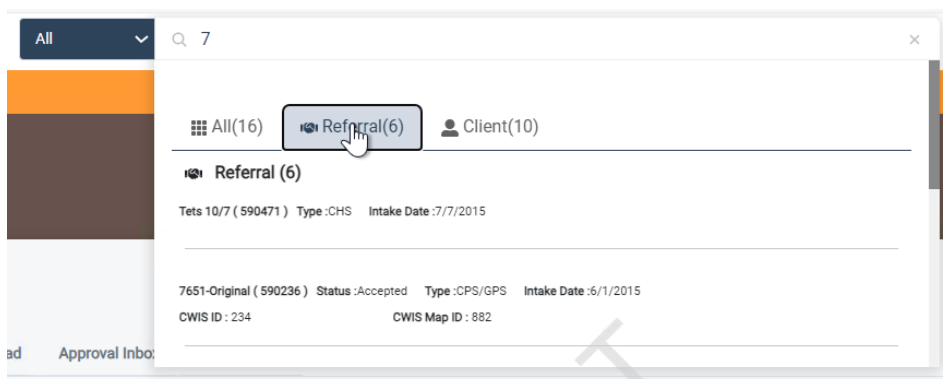
Dailey ( 711878 ) Status :Accepted Type :CPS/GPS Intake Date :3/7/2024  
CWIS ID : 20035113 CWIS Map ID : 151355

1. Users can enter any number of characters (even 1) and return results.

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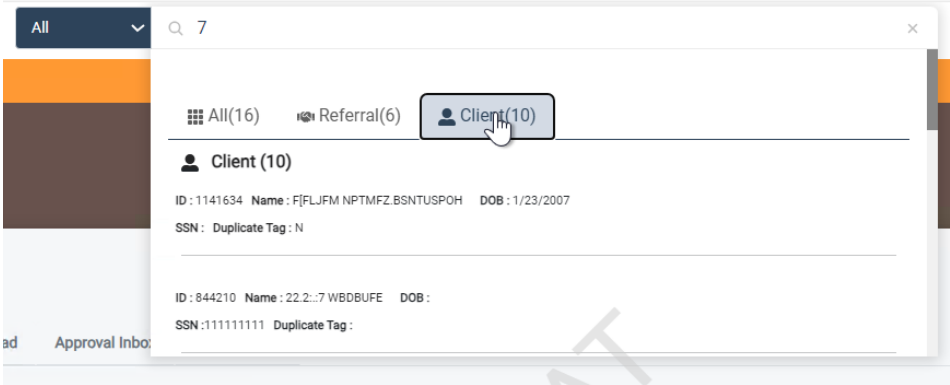


2. Users can also enter numbers, such as referral IDs.

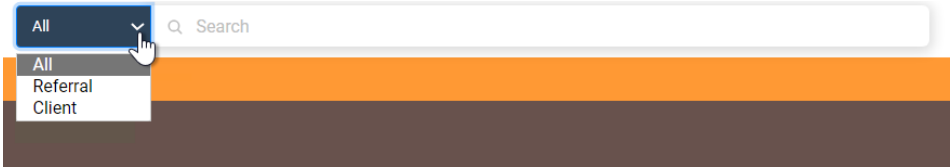


3. If the user is searching for a referral specifically and want to filter out the other results, they can click on the referral tab within the search dropdown.

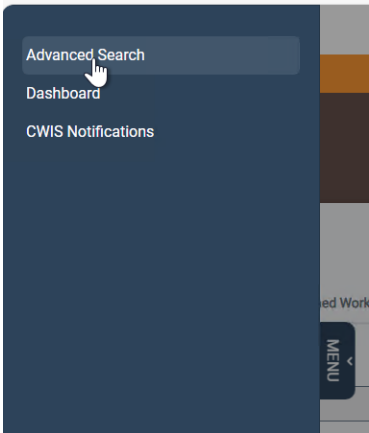
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4. Users can do the same for clients.



5. If the user would like to filter the results before searching, they can also use the dropdown to the left of the search bar.



1. To access Advanced Search, users need to click on the floating Menu button.

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Please Note: This is the UAT Environment.

### Advanced Search

Keywords

Advanced Options

Client Referral

Entity ID	Entity Type	First Name	Middle Name	Last Name	DOB	SSN	MCI ID	Duplicate
No results found								
10 < < 1 of 0 > >								

2. The Advanced Search screen will open as shown above.

Keywords

Advanced Options

Client

Legal First Name  Legal Middle Name  Legal Last Name  Date of Birth

Legal Sex  Race

Address Line 1  City

Address Line 2  State  Zip Code

KIDS Client ID  MCI ID

SSN  Recipient ID Number

Referral

Client Referral

3. Using the arrow to the left of Advanced Options, users can open the collapsed section.
4. Within that collapsed section there is also a section for Client which can be opened, and the above fields are available.

Keywords

Advanced Options

Client

Referral

Referral Name  KIDS Referral ID  CWS Referral ID  CWS Map ID

Client Referral

5. Additionally, there is a section for referral information if the user is trying to search for a referral.

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Keywords  
sanders

Advanced Options

Client

Referral

Referral Name  KIDS Referral ID  CWS Referral ID  CWS Map ID

Client Referral

Entity ID	Entity Type	First Name	Middle Name	Last Name	DOB	SSN	MCI ID	Duplicate
134813	Client	Martin		Sanders	07/13/2007		1001096214	N
830845	Client	KPZ	F	UPSC,JO	05/06/2001		1000548374	N

6. To search using keywords, the top search box can be used. The search results are defaulted to show the Client tab.

Keywords  
sanders

Advanced Options

Client

Referral

Referral Name  KIDS Referral ID  CWS Referral ID  CWS Map ID

Client Referral

Referral ID	Type	Referral Name	Family Worker	Referral Date	Outcome Date	Referral Status
100000	CPS/GPS	Sanders	Brittney Smith	04/16/2024	04/16/2024	
100000	CPS/GPS	Heims	Sanders, Megan	04/16/2024	04/17/2024	Accepted

5. To view Referrals, the Referral tab must be opened.

Auto Complete Address Control

The auto-complete functionality is present for all address search fields.

Household Address

☒ In State ☐ Out of State ☐ Foreign

Type Address to Search

Business Name

Phone 1 Type

Phone 1 No

Phone 1 Ext

Phone 2 Type

Phone 2 No

Phone 2 Ext

☐ Same As Incident Address ☐ Unknown Address ☐ Homeless

Location Detail

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When the user types part of an address, minimum 5 characters, the related address suggestions are displayed in the drop down shown below.

The screenshot shows a web form with a sidebar on the left containing menu items like 'Client Relationships', 'Collateral', 'Critical Information', 'Allegation Info', 'Referral Outcome', 'Field Screening Research', 'FS/OC Contacts', 'FS/OC Photos', 'FS/OC Universal Assessment', and 'Additional Information'. The main form area has several sections. The 'Household Name' field contains 'testing'. The 'Referral Area' dropdown is set to 'CPS/GPS'. The 'Incident Address' section has radio buttons for 'In State' (selected), 'Out of State', and 'Foreign'. Below this is a 'Type Address to Search' field with a dropdown menu open, showing suggestions: '1st main', '1st Street Arona, PA 15617', 'Main Street Homer City, PA 15748', '1st Street & Main Street Kams City, PA 16041', and '1st Street & Main Street Cassandra, PA 15925'. There are also checkboxes for 'Unknown Address' and 'Homeless', and fields for 'Location Detail', 'Phone 1 Ext', and 'Phone 2 Ext'.

The user can select any of the values displayed in the drop down. Once the address is selected, it will be displayed with the Verified tag.

The screenshot shows a web form with a dropdown menu at the top set to '-- Select an option --'. Below it is the 'Household Address' section with radio buttons for 'In State' (selected), 'Out of State', and 'Foreign'. The 'Address' field contains '1st Street, Smithfield, Fayette, PA, 15478 - 1620' and is marked with a 'Verified' tag. To the right of the address are pencil and trashcan icons. Below the address is an 'Address Line 2' field. The 'Address Type' dropdown is set to '-- Select an option --' and there is a 'Current Residence' checkbox. A 'More Address Information' link is also present. At the bottom, there are fields for 'Business Name' and 'Location Detail'.

Commented [CP7]: Can we please add details about what edit and bin icon does? There seems to be some confusion around it so it's a good to have info in the training doc.

Pencil and trashcan icons are shown to the right of the address for the editing and deletion of addresses. When a user clicks the pencil icon, they are able to make edits to the previously

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saved address. If a user would like to completely clear the address, they can click the trashcan icon and the address will be removed.

### Photos - Bulk Upload

On the photos screen, there is the ability to upload photos using the Upload Photo button.

Filters

Client: Select all that app | Photo Type: Select all that app | Approval Status: All

Buttons: Delete, Send back, Approve, Request, **Upload Photo**

Thumbnail	Approval Status	Photo Type	Client Name	Description	Date Taken
No results found					

Page 1 of 0

Back Cancel & Go Back to Dashboard Next

The user can choose a file by clicking in the field or dragging and dropping files into the section. Once the photos are selected, the user can fill in the required fields below.

Choose files or drag them here

Screenshot (105).png

Photo Type *Required*: Developmental | Client Name *Required*: -- Select an option -- | Date *Required*: mm/dd/yyyy | Time *Required*: HH:MM TT

Child Line | Witness *Required* | Photographer *Required*

Caseworker Assignment | Supervisor Assignment | Uploaded By

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If the user selects more than one photo to upload simultaneously, they can click Apply to All Photos to apply all entered details to all photos.

After applying the details to all photos, you can still edit the information for individual photos. For example, if the client's name is different but all other details are the same, use the 'Apply to All Photos' option and then update the Client Name for individual photos.

Once all the required details are added, the user can click the Upload button and the photos will be uploaded with entered details.

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### **State MCI Clearance**

Users can perform the state MCI clearance by using the magnifying glass for State MCI under Additional Client Information section. The State MCI will show 'Not available' until the client has state MCI.

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**kidsTOO** Allegheny County Department of Human Services

Session will time out in: 59:58 AM

Please Note: This is the UAT Environment.

Investigation Investigation Review Client Details

Family Assignment: Amber Manning Household Name: SA, Magnewald Referral Date: 07/04/2024 Referral Type: CPS/GPS CWS ID: 901940387, 901940388 KIDS Referral ID: 766114 Response Time: Immediate

> Investigation Milestones (3/9)

**Client Details**

Investigation Overview

- Client Details
- Client Relationships
- Collateral
- Investigation Research
- Contacts
- Photos
- Universal Assessment
- Allegations & Assessment Findings
- Investigation Outcome
- Service Decision
- CPS Summary
- CWS Summary
- Investigation Closure
- Field Screening Research
- FS/OC Contacts
- FS/OC Photos
- FS/OC Universal Assessment
- Additional Information

Client Name	Client ID	Age	DOB	Legal Sex	Role	Race	Ethnicity	End Date	MCI	Required Fields Completed
Sawyer Barnes	158038	1	3/21/2023	Male	Child	White	Not Hispanic, Latino, Or Spanish Origin	100183006		
SHYLAR WEDDELEY	158038	11	10/19/2012	Female	Child	Unable to determine	Unable to determine	100183007		
AMIR CUMMINGS	1539760			Female	Other	Unable to determine	Unable to determine			
ANNA SACON	1539761			Female	Other	White	Not Hispanic, Latino, Or Spanish Origin			
JARED BARNES	1539762			Male	Other	White	Not Hispanic, Latino, Or Spanish Origin			

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**Selected Client - Sawyer Barnes**

**Additional Client Information**

☐ Unknown Client Information

Prefix: Sawyer First Name: Sawyer Middle Name: Last Name: Barnes Suffix: - Select an option -

\*Client Age Required: Actual DOB: 03/21/2023 \*Date of Birth Required: 03/21/2023 Approx. Age: 1 Estimated DOB: Deceased

\*Legal Sex Required: Male

Pronouns: - Select an option -

Gender Identity: - Select an option - Confidential

Sexual Orientation: - Select an option -

Preferred Prefix: Preferred First Name:

Maiden Name:

SSN: Unknown SSN No SSN Verified SSN

State MCI ID: Not Available

Recipient ID:

Distinguishing Characteristics:

**Race and Ethnicity**

\*Race (select all that apply) AFCAAS required: White \*Ethnicity AFCAAS required: Not Hispanic, Latino, Or Spanish Origin

\*Agency has made inquiries as to whether child is an "Indian Child" under ICWA? AFCAAS required: No \*ICWA applies for this client? AFCAAS required: No

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On click of the magnifying glass below popup will open. User can either select one of the existing state MCI from the Search Results or Create New State MCI by clicking the button at the top.

User can also see additional information about the Search Results by using the drop arrow towards the end of the table row.

State MCI Clearance

Create New State MCI

First Name

Middle Initial

Last Name

Date of Birth

James

Smith

03/04/1975

SSN

Gender

Male

Address

1326 WILMERDING AVE, EAST MC KESPORT, PA, 15035

Search Results

Type	MI	First	Middle Initial	Last	Suffix	SSN	DOB	Gender	% Match
<input type="radio"/> Client	61792232	JAMES		SMITH		68134417	06/15/1975	Male	83
<input type="radio"/> Client	79039094	JAMES		SMITH			07/07/2010	Female	67
<input type="radio"/> Client	90385871	JIMMY		SMITH			01/01/2015	Male	32
<input type="radio"/> Client	140367218	JIMMY		SMITH		238749648	01/15/1953	Male	32
<input type="radio"/> Client	830388040	JIMMY		SMITH			01/01/2018	Male	32

5

<

>

1 of 1

Cancel

Select Person

JOB AID: ENHANCED FUNCTIONALITY



State MCI Clearance

James Smith 03/04/1975

SSN: Gender: Male

Address: 1326 WILMERDING AVE, EAST MC KESPORT, PA, 15035

Search Results

Type	ID	First	Middle Initial	Last	Suffix	SSN	DOB	Gender	% Match
Client	61732232	JAMES		SMITH		683154417	09/15/1975	Male	83

Additional Information

Check which info should be copied into the Client Details page

State MCI ID: 61732232

First Name: JAMES Middle Name: Last Name: SMITH

SSN: 683154417 Gender: Male DOB: 09/15/1975 Race: White

Client: 79090994 JAMES SMITH 07/07/2010 Female 67

Client: 90385871 JIMMY SMITH 01/01/2015 Male 32

Upon selecting or Creating the new state MCI, it will start reflecting on the screen. However, it will not be saved until the Save button is clicked. The message next to State MCI ID field will indicate the same.

Sexual Orientation: - Select an option -

Preferred Prefix: Preferred First Name:

Maiden Name:

SSN: Unknown SSN No SSN Verified SSN

State MCI ID: 61732232 **State MCI Updated. Click Save Button to save changes.**

Recipient ID:

Distinguishing Characteristics:

Race and Ethnicity

\* z Race (select all that apply) AFCAFS Required: White

\* z Ethnicity AFCAFS Required: Not Hispanic, Latino, Or Spanish Origin

\* z Agency has made inquiries as to whether child is an "Indian Child" under ICWA? AFCAFS: Yes No

\* z ICWA applies for this client? AFCAFS: Yes No Unknown

Easy-to-Use Approval Control

In the photos and contacts screens there are options to approve and send back. The user can directly select the record and click on Approve or Send back.

## JOB AID: ENHANCED FUNCTIONALITY



Client: Select all that apply | Photo Type: Select all that apply | Approval Status: All

Delete Request Upload Photo

	Thumbnail	Approval Status	Photo Type	Client Name	Description	Date Taken	
<input checked="" type="checkbox"/>		Send Back	Environmental		Created By: Price Donna on 05/...	05/02/2024	
<input type="checkbox"/>		Requested	Environmental		Created By: Price Donna on 05/...	05/09/2024	
<input type="checkbox"/>		Requested	Environmental		Created By: Price Donna on 05/...	05/09/2024	

5 << < 1 of 1 > >>

Back Cancel & Go Back to Dashboard Next

1. For approvals, users will select the entry for which they would like to request approval. Then they click the Request button.

Request Approval

Requesting Worker: Donna Price | Requesting Date: 6/21/2024

\* Approving Worker Required: Emily Fries - INTAKE 1 | Request Approval

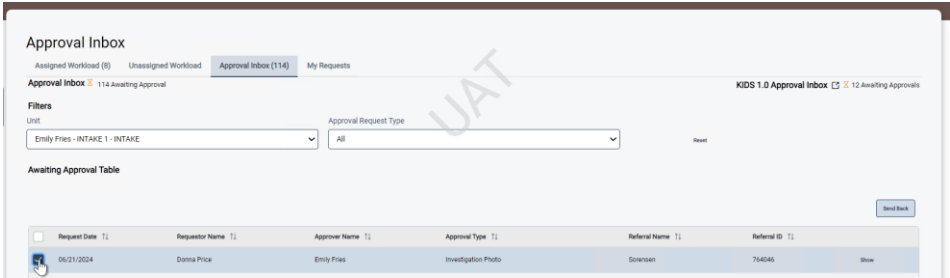
	Thumbnail	Approval Status	Photo Type	Client Name	Description	Date Taken	
<input checked="" type="checkbox"/>		Send Back	Environmental		Created By: Price Donna on 05/...	05/02/2024	
<input type="checkbox"/>		Requested	Environmental		Created By: Price Donna on 05/...	05/09/2024	
<input type="checkbox"/>		Requested	Environmental		Created By: Price Donna on 05/...	05/09/2024	

5 << < 1 of 1 > >>

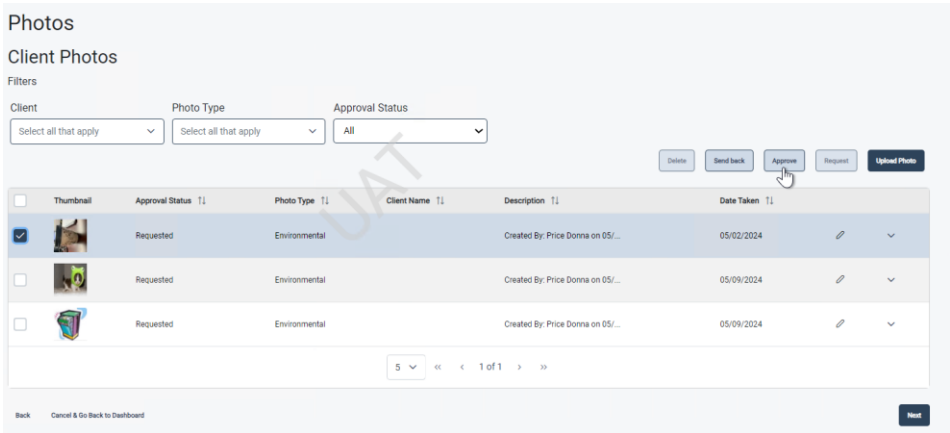
Back Cancel & Go Back to Dashboard Next

2. Users are then prompted to select an Approving Worker from the dropdown.
3. After selecting an Approving Worker, click the Request Approval button.
4. The request will be sent to the Approving Worker's Approval Inbox.

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- 5. The above screenshot shows the request in the Approving Worker’s Approval Inbox.
- 6. To view the request, click Show at the end of the row.



- 7. If the request should be approved, the approving worker clicks the approve button and the request will be approved.
- 8. If the request is unsatisfactory, the user can either click the Send Back button to the left of the approve button, or they can send back from the dashboard.

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Approval Inbox

Assigned Workload (0)   Unsigned Workload   **Approval Inbox (114)**   My Requests

Approval Inbox 114 Awaiting Approval   KIDS 1.0 Approval Inbox 11 Awaiting Approvals

Filters

Unit: Emily Fries - INTAKE 1 - INTAKE   Approval Request Type: All   Reset

Awaiting Approval Table

<input type="checkbox"/>	Request Date [1]	Requester Name [1]	Approver Name [1]	Approval Type [1]	Referral Name [1]	Referral ID [1]	
<input checked="" type="checkbox"/>	05/14/2024	Donna Price	Amber Manning	Investigation Photo	Sorensen	764046	Show

Send Back

9. From the Approval Inbox, the user can choose the entry and select the Send Back button.

Awaiting Approval Table

\* Send Back Comments *Required*

Send Back

Close

10. The user will then be prompted to add Send Back Comments.  
11. If the request is sent back it will appear in the My Requests tab of the requesting worker’s Dashboard.

Developmental   Investigative   Environmental   Personality Photos   Finalization   School Photos

Results 1 - 1 of 1

Thumbnail	Description	Date Taken
	Created By: Sherosky Kristy on 1/22/2024 1:33:50 AM -	1/22/2024

Remove   Reassign

Save   Preview   Cancel

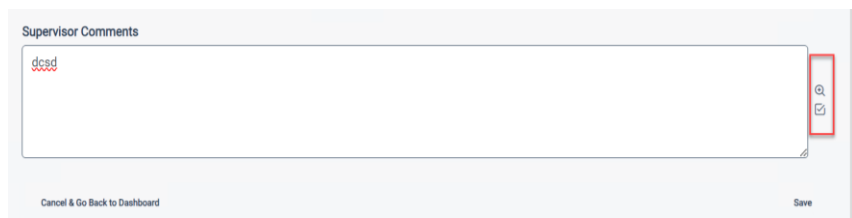
In Legacy KIDS, this functionality is not available. The user cannot directly select a request and approve it.

## JOB AID: ENHANCED FUNCTIONALITY

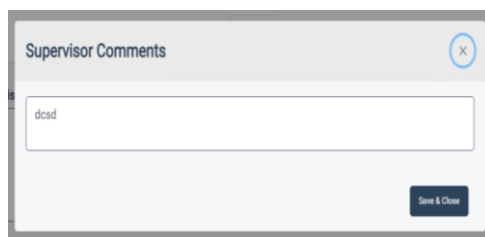


### Magnifier and Spell Check

Magnifier and spell check tools are present in for text areas like Notes or Comments throughout the application.



When the user selects the Magnifying Glass icon, the Comments pop up is displayed. From here, the user can view comments and also edit as required. Click the Save & Close button to save any changes.



The user can also use spell check by clicking on the spell checker icon which is beside the Comments text box. If there is an internally used word or acronym that is showing up as misspelled, users can click the Add to Dictionary box so it will not be shown as misspelled in the future. After clicking, the below pop up is displayed and the user can go forward in updating the text.

# JOB AID: ENHANCED FUNCTIONALITY



General Info Clients/Reporter Allegations Contacts Outcome

Supervisor Comments

dcscd

Character Count: 4

Not in Dictionary:

dcscd

Ignore Once

Ignore All

Add to Dictionary

Suggestions:

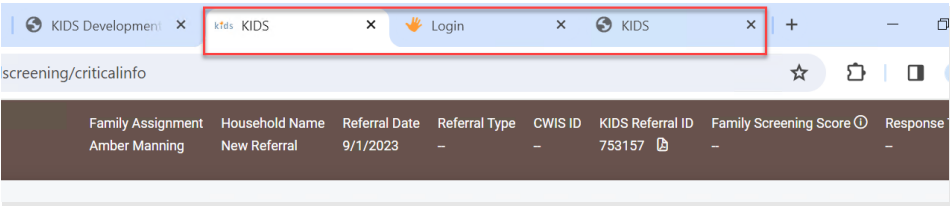
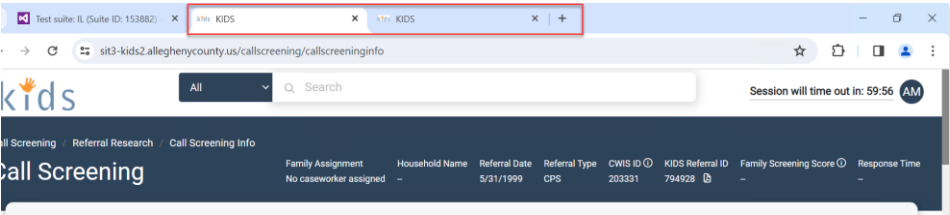
DCSD

Change

Change All

## Multiwindow Usage

Users are now able to have more than one window of KIDSTOO open at a time.



## Selection of Roles (For Users with Multiple Roles)

When logging in, the user selects their desired role using the radio buttons and then clicks Login.

JOB AID: ENHANCED FUNCTIONALITY



Please select which role you wish to continue as

	Role ↑↓	Staff Name ↑↓	Program Office ↑↓	Unit ↑↓
<input type="radio"/>	KIDS Specialist	Amber Manning	INTAKE	INTAKE 1
<input type="radio"/>	Call Screening Supervisor	Amber Manning	ERO	ERO 7

Login

For users with multiple roles, they can switch roles without closing the application using Switch Role. Select the user icon (user initials) and then click Switch Role. The user can switch roles without closing the application.

Session will time out in: 59:58 AM

Logged in as:  
Amber Manning

Role:  
KIDS Specialist

Switch Role

Sign Out

Bulk Assignment Transfer

The user can assign multiple referrals at the same time by selecting the checkboxes of the referrals and clicking the Assign/Transfer button at the top of the grid.

Transfer Summary Restrict Contacts Assign/Transfer

<input type="checkbox"/>	ID ↑↓	Referral Type ↑↓	Family Name ↑↓	Parent Name ↑↓	Date Assigned ↑↓	Intake Date ↑↓	Family Worker Name ↑↓	Admin Worker Name ↑↓	Individual Count ↑↓	Field Screening Assigned? ↑↓	
<input checked="" type="checkbox"/>	744786		conversion testing dtsd	Xc Xccc	8/26/2023	6/1/2012	Amber Manning	Crazy Horse	7	No	Show
<input checked="" type="checkbox"/>	698679	GPS	Subcategory Check	Akshay Perp	1/15/2024	1/15/2024	Amber Manning		2	No	Show
<input checked="" type="checkbox"/>	698678	GPS		Cassandra Lightner	1/15/2024	2/27/2023	Amber Manning		3	No	Show

## JOB AID: ENHANCED FUNCTIONALITY



The Assign/Transfer Details pop up is displayed. The user can select the Program Area, Unit, Worker, and add Summary Comments if required and then click Save.

After clicking Save, the confirmation pop up is displayed. When the user clicks Yes, all selected referrals will be assigned to the selected worker.

### Investigation Milestones

This is a new addition in KIDS TOO for Investigation Referrals to get a quick overview of different milestones as part of investigation process and their status. Since it's not a linear process, the milestones can be completed in no particular order. Some of these milestones have due date while others can be completed within the period of 60 days. The ones having due date will show the Due date to start with and will start showing the completion date as soon as it's completed.

## JOB AID: ENHANCED FUNCTIONALITY



The screenshot shows the kidsTOO web application interface. At the top, there is a header with the kidsTOO logo, a search bar, and a session timer. Below the header, there is a navigation bar with tabs for 'Investigation', 'Investigation Outcome', and 'Investigation Closure'. The 'Investigation' tab is selected. Below the navigation bar, there is a table with columns for 'Family Assignment', 'Household Name', 'Referral Date', 'Referral Type', 'CWIS ID', 'KIDS Referral ID', and 'Response Time'. The table contains one row of data. Below the table, there is a section titled 'Investigation Milestones (7/9)' which displays a series of icons representing different milestones: Intake Date, First Visit and Contact, Input Photos, Safety Universal Assessment, Additional Visit and Contact, Full Universal Assessment, Service Decision, CWIS Summary, and Investigation Closure. Each icon has a checkmark, indicating that the milestone has been completed.

- Intake Date - defaults as checked and pulls intake date.
- First Visit and Contact - checks when first face to face contact is completed and pulls the date of that contact.
  - Contact is complete when "Completed" radio button is selected.
- Input Photos - checks once a photo is entered for all child clients (participating as a child = Yes) and pulls date of photo entered on last child
- Safety Universal Assessment - checks once UA - Safety is approved and pulls the assessment date.
  - Count only Safety-UA (does not count Safety On-Call)
  - Always pulls latest assessment date of latest Safety UA listed on UA History List screen for referral.
- Additional Visit and Contact - checks once a new face to face contact is entered after the initial face to face contact.
  - Always pulls the date of the latest face to face contact if there are more than one documented after the initial face to face contact.
- Full Universal Assessment:
  - By default, shows Due Date. Due date is 60 days after the Intake date.
  - Once Full UA is approved, it changes the due date to the Assessment date.
  - Always pulls latest assessment date of latest Full UA listed on UA History List screen for referral
- Service Decision:
  - By default, shows the Due Date. Due date is 60 days after Intake date.
  - Once Service Decision is approved, it changes the due date to the approval date.
- CWIS Summary - checks once CWIS summary is approved and pull approval date.
  - By default, it shows the Due Date. Due date is 60 days after Intake date.

## JOB AID: ENHANCED FUNCTIONALITY



- Once CWIS Summary is approved, it changes the due date to the approval date.
  - Pulls approval date of highest tier approval.
- Does not update approval date in amend scenario. If INV is amended, it keeps the original approval date.
- CWIS id merge scenario - it shows approval date once all CWIS IDs have approved CWIS Summary
  - For latest approval date it uses the date of the highest tier approval
- Investigation Closure - checks once referral is closed and pulls the date when INV was closed.
  - Does not update approval date in amend scenario. If INV is amended, it keeps the original approval date.

## KIDS Specialist Functionality

### CWIS Notification

To access the CWIS Notification screen, users click the floating Menu button and then select CWIS Notification. The CWIS Notification list screen will open and default to the Missing Outcomes/Untimely Referrals tab. From here, users can search to find both active and resolved items. Multiple filters are available to pare down results. Additionally, results can be marked as resolved. The user selects the result using the checkboxes in the leftmost column and then clicks the Mark as Resolved button in the bottom right corner.

Commented [CP8]: This should be moved to Specialist Functionality Doc.

## JOB AID: ENHANCED FUNCTIONALITY



To view Case Communications, users click the Case Communications tab at the top of the screen. The same filters are available to pare down results. To view a result, users click the Show button to the far right of the row. Users can also add new by clicking the New button above the top right corner of the grid.

**Notification List**

CWIS Notification List

Missing Outcomes/Unlikely Referrals Case Communications Action Required

**Filters**

Program Area: Bruce Noel - INTAKE  
Unit: Emily Fries - INTAKE 136  
Worker Name: Amber Manning  
Notification Type: All

Referral Type: All  
CWIS Referral ID: KIDS Referral ID

New

KIDS Referral ID	CWIS Referral ID	Notification Date	Notification Source	Notification Type	Notification Status	Office	
76486	90801034	05/27/2024	Sent to CWIS	Referral Clarification	Transmission Successful	INTAKE	Show
76481	90801032	05/27/2024	Sent to CWIS	Appeal Request	Transmission Successful	INTAKE	Show

After clicking the New button, The Notification Details screen will open with blank fields available for users to input known information.

**Notification List**

**Notification Details**

**Notification**

Worker Name: Notification Type: Subject: Source:

No results found

20 < > 1 of 0

**Notification Details**

Worker Name: Amber Manning  
Worker ID: K0TEST1  
Supervisor Name: Emily Fries  
County: Allegheny

\*CWIS Referral ID Required  
\*Notification Type Required  
\*Date Required  
\*Time Required

- Select an option -  
05/28/2024  
01:06 PM

**User Narrative**

Subject:

Narrative:

Back Cancel & Go Back to CWIS Notification List Send

After completing the required fields, the user can send the details to the state by clicking the Send button in the bottom right corner.

JOB AID: ENHANCED FUNCTIONALITY



Notification List

CWIS Notification List

Missing Outcomes/Untimely Referrals

Case Communications

Action Required

Filters

Program Area

Bruce Noel - INTAKE

Unit

Emily Fries - INTAKE 1 36

Worker Name

Amber Manning

Notification Type

All

Referral Type

All

CWIS Referral ID

KIDS Referral ID

KIDS Referral ID

Next

Show Active

Show Resolved

KIDS Referral ID	CWIS Referral ID	Notification Type	Notification Date	Office	Assigned Worker	Assigned Supervisor	Notes
645229	8094492	Change of Status received from State	05/27/2024				
666076	9127084	Change of Status received from State	10/10/2023				
626354	9368362	Change of Status received from State	10/09/2023				

CWIS Data Correction

Specialists can access CWIS Data Correction screen from within the referral using the left navigation menu as highlighted below. The similar menu is available when the referral is still in Call Screening.

KIDS 2.0 INV UAT Dashboard

KIDSTOO

uat1-kids2.alleghenycounty.us/investigation/investigationoverview

Field Screening Research

FS/OC Contacts

FS/OC Photos

FS/OC Universal Assessment

Additional Information

CIU

Courts

Services

Shelter

Missing & Runaway Youth

Reports

Record Review

Supervisor Log

CWIS Data Correction

Children

Contact Date

Type

Announced

Status

Worker

No results found

5

1 of 0

Universal Assessment

Latest Assessment Date

No Approved UA exists

Latest Assessment Type

No Approved UA exists

Overall Risk

Risk has not yet been assessed

Assessor Name

No Approved UA exists

Safety Threats Exist

Safety not yet assessed

Date Approved

No Approved UA exists

Children

KAREN KIDO - Age: 10

Exchange of Medical Info Letter

Client Details Screen

Address

22 Bakers Drive, Washington Crossing, United States 18977

Legal Sex

Male

Phone Number

Preferred Names

Gender Identity

Blank

Pronouns

Sexual Orientation

Blank

Race/Ethnicity

White/Cuban

School Name

Role at Intake

Alleged Victim/ Subject Child/Child

Latest Safety Decision

Not Available

The user will have 2 options – Delete Referral or Remove Outcome Approval.

## JOB AID: ENHANCED FUNCTIONALITY



kids100

All▼ Q Search

Session will time out in: 59:57

Please Note: This is the UAT Environment.

Call Screening

Additional Information

CWS Data Correction

Call Screening

Family Assignment  
Amber Manning

Household Name  
test

Referral Date  
06/08/2024

Referral Type  
CPS/GPS

CWS ID  
90081179, 90081180

KIDS Referral ID  
766182

Family Screening Score  
-

Response Time  
Immediate

← Close

● Referral Research

Call Screening Overview

● Call Screening Info

● Client Details

● Client Relationships

● Collateral

● Critical Information

● Allegation Info

● Referral Outcome

● Field Screening Research

FS/OC Contacts

FS/OC Photos

FS/OC Universal Assessment

● Additional Information

Contacts

CWS Data Correction

Delete Referral

Remove Outcome Referral

\*Reason Required

Cancel & Go Back to Dashboard

Complete Action

If it's a CWIS created Referral, upon selecting the Delete Referral option, user will be asked to decide whether to put the referral back to workbasket or not.

Selecting 'No' will completely wipe off the referral from the system.

kidsTOO

Session will time out in: 59:58

Please Note: This is the UAT Environment.

Call Screening

Additional Information

CWIS Data Correction

Family Assignment  
Anther Manning

Houshold Name  
test

Referral Date  
04/08/2024

Referral Type  
CPS/CPS

CWIS ID  
90001179, 90001180

KIDS Referral ID  
754382

Family Screening Score  
Response Time Immediate

Call Screening Overview

Call Screening Info

Client Details

Client Relationships

Collateral

Critical Information

Allegation Info

Referral Outcome

Field Screening Research

FS/OC Contacts

FS/OC Photos

FS/OC Universal Assessment

← Close

CWIS Data Correction

Delete Referral

Remove Outcome Referral

\* Reason Required

CWIS Referral ID [1]	Referral Type [1]	* Return to Workbasket [1]
90001179	CPS	- Select an option -
90001180	CPS	- Select an option -

Cancel & Go Back to Dashboard

Complete Action

## JOB AID: ENHANCED FUNCTIONALITY



### CWIS Update (Magic Wand)

When the state sends the update on existing referral, instead of manually typing those updates in the system, specialists or ROD can perform the CWIS update on the referral on the Workbasket. This applies updates received from state to the KIDS referral. The update process is done asynchronously, and user can continue with tasks in the application.

The CWIS Update functionality is available in two places:

- Existing Referral tab: The button CWIS Update can be clicked after selecting the referral that needs to be updated.

The screenshot shows the 'Referral List' and 'Workbasket' sections of the kidsTOO application. In the 'Workbasket' section, there is a table of referrals. The 'CWIS Update' button is highlighted in a red box. The table contains the following data:

CWIS Referral ID	KIDS Referral ID	Referral Type	Allegation Type	CWIS Created Date/Time	CWIS Received Date/Time	Mother	Victim(s)	Age of Youngest Victim	Primary County	Reviewed
9608767	688762	CHS		10/28/2022 01:01 PM	06/24/2024 09:56 AM	Angeline Gadrack	Sabrina Gadrack	16	Allegheny	Yes
9721850	894330	GPS	Conduct By Parent, Caregiver, or Household Member ---	02/23/2023 04:15 PM	05/29/2024 06:58 AM	Megan Norris	Olivia Norris, Jason Roberts	0	Allegheny	Yes
9743458	695340	GPS	Inadequate Basic Needs (Clothing/Food/Hygiene)---	03/15/2023 02:37 AM	06/04/2024 02:38 AM		Nasir Jones	10	Allegheny	Yes
20911532	764589	RNO		06/27/2023 12:31 PM	06/07/2024 07:18 AM	Barbara Boden	Jenna Handley, Drake Strickland	13	Allegheny	Yes
9849751	705429	CHS		07/05/2023 09:53 AM	06/13/2024 07:59 AM	Denise McElroy	Maverick Kemp, Giovanni Kemp	2	Allegheny	Yes
2000019	765271	CPS	Causing Bodily Injury To Child Through Recent Act---	08/14/2023 09:01 PM	06/21/2024 09:29 AM	Katie Cross, Mattie Plus	Jude Cross	3	Allegheny	Yes
9000384	764446	GPS	Conduct By Parent, Caregiver, or Household Member ---	06/14/2023 09:01 PM	06/12/2024 04:55 AM	Katie Cross, Mattie Plus	Jude Cross	3	Allegheny	Yes

- On all 4 Referral Review Screen: The CWIS Update button can be found when user clicks on the View Referral from Workbasket and opens the Referral Review Screen for reviewing the information received from the state.

## JOB AID: ENHANCED FUNCTIONALITY



kidsTOO

Child Welfare Services

AM

▼

Q Search

Please Note: This is the UAT Environment.

WorkbasketReferral ReviewReferral & Reporter

Referral Review

Intake Date6/23/2023Referral TypeSRVCRWS ID7171850Mother's NameNegera JonesVictim's NameDavid Morris, Jason Roberts

◀ Close

Referral Review

Referral & Reporter

Client Details

Critical Information

Allegation

Mark as Do Not Create Referral

Referral & Reporter Information

Referral Information

CRWS Referral ID	Intake Date	Intake Time	Contact Type	Primary County	Incident Address
7171850	2/23/2023	4:15 PM	Telephone	Allegheny	105 DIXIE RD, PITTSBURGH, PA 15229
20 of 1 of 1					

Reporter Information

CRWS Referral ID	Reporter Name	Reporter Type	Source of Knowledge of Situation	Relationship to Report
7171850	Detective James Norris	Mandated Reporter	Told by Another Party	Law Enforcement Agency
20 of 1 of 1				

BackCancel & Go Back to Workbasket

CRWS Update

Next