Simone Design Document

Introduction

Simone is a tailormade platform crafted to enhance the management and oversight of cases in the field of Social Work. The system offers a user-friendly interface combined with robust backend capabilities, allowing for efficient handling of a case through its typical lifecycle. Integrating essential features like adding case notes, uploading reports, tracking social worker time, and managing forms, this system provides a comprehensive toolkit for case administrators and workers.

Definitions

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| **Term** | **Definition** |
| DAR | Daily Activity Report – used a record of business activity such as email, phone call, visit with a client, writing a report, etc.  This data is collated on the ‘Export Activity’ page. |
| Court Order | An official document from the State Court System that dictates the terms of engagement with the client. Court Orders give CFS authority to service a case and allocate a number of hours to dedicate to the case. |
| Supplemental Order Request | A formal request sent by the CFS admin team to the Court to request additional time be allocated to service the case |
| Supervised Visitation | A meeting where the visiting parent is allowed to spend time with their child under the supervision of CFS |
| Custodial Parent | The parent who has custody of the child/children |
| Visiting Parent | The parent who needs to apply for visitation rights to see his/her child/children |

Business Use Case

The CFS business model relies on the NYC Family Court system for referrals. Families who are going through custody dispute proceedings require a neutral third-party to supervise when the non-custodial parent (visiting parent) is sending time with the child.

The core service provided by CFS is Supervised Visitation. This service involves having a licensed Social Worker be present when the visiting parent is interacting with the child or children.

Case Life Cycle



Roles and Responsibilities

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| **Role** | **Responsibility** |
| Administrator | Manages the IT assets of the business. Includes all physical devices such as computers, printers, phones, routers. Additionally, the Administrator controls the digital assets and software. This includes managing access to all tools used by the business, such as Office 365 and Simone. |
| Operations | Responsible for administrative tasks such as coordinating between courts and clients. Responsible for importing court orders into Simone and creating cases. |
| Billing | Responsible for billing clients and courts, handling payments and tracking Social Worker time spent on services. |
| Supervisor | Responsible for case triage. Includes assigning and closing/opening cases. Also involves reviewing case notes and court reports. |
| Social Worker | Responsible for servicing cases. This involves scheduling and attending supervised visitations with clients, doing new client intake. Also responsible for creating notes, court reports and accurately tracking their time. |
| Associate | Responsible for servicing cases. This involves scheduling and attending supervised visitations with clients. Also responsible for creating notes, court reports and accurately tracking their time. |

Because Simone is storing sensitive and private client data, access to content must be strictly controlled.

Social Workers and Associates should only be able to view cases that are or were assigned to them. There is a need for the Administrator to have granular control over who can access the key UI Views in the system.

Key UI Views that need Access Control

* Viewing All Cases: should be restricted to Billing, Operations, and Supervisor roles.
* Export Activities: Should be restricted to Billing roles
* My DARs: should show only DARs created by the logged in user.
* My Open Cases: should only show Cases that are assigned to logged in user.

Permissions & Access Control

The following table lists various key actions within Simone and the required permissions to perform the action.

*\*The administrator role can perform all actions below*

|  |  |
| --- | --- |
| **Action** | **Permissions** |
| Create a case | Operations  Billing  Supervisor |
| Edit Case | Operations  Billing  Supervisor  *Assigned* Social Worker  *Assigned* Associated |
| Change case status (open/close) | Operations  Billing  Supervisor |
| Delete Case | Billing |
| View Case | Operations  Billing  Supervisor  *Assigned* Social Worker  *Assigned* Associated |
| View All Cases | Operations  Billing  Supervisor |
| Create a Case Note | Anyone |
| Edit / Delete Case Note | Operations  Supervisor |
| Create a Daily Activity Report | Anyone |
| Edit / Delete Daily Activity Report | User who created the Daily Activity Report |
| Create a Supplemental Order Request | Anyone |
| Edit Supplemental Order Request | Operations  Billing  User who created the Request |
| Delete Supplemental Order Request | Administrator |
| Export Activities / Download as CSV | Billing |
| View Activities | Billing |

Daily Activity Reports

Background

Daily activity reports are intended to serve a timesheet for CFS social work staff. Social Workers and Associates are expected to log a record of all their activities throughout the day. This includes all phone calls, emails, supervised visits, meetings, time spent writing reports and other activities. At the end of each pay period, all Case Workers submit their ‘DARs’ (Daily Activity Reports) for the pay cycle.

The CFS Billing Department uses the DARs for each social worker to bill clients or the City of New York to get reimbursed for services provided. And CFS Operations team uses the DARs to pay Case Workers for their time.

DAR Export

At the End of each Pay Period, the Billing Department will ‘export’ all the DARs from that cycle. This process involves:

* Opening the ‘Export Activities’ page
* Filter the records by pay period
* Downloading the records as a CSV
* Marking the filtered records as ‘Exported’



The Export Activities page facilitates the DAR Export process. It allows the Billing Department to run a report against the database. Enabling Billing staff to view DARs in a given time period. A critical part of this process is the ability to ‘Download as CSV’. This button does exactly as the name describes, and downloads the Activities returned by the search as a .csv file.

This CSV file is critical for business operations. This data is taken from Simone and imported into third-party tools that facilitate bookkeeping activities for the business. The format of the data is critical for the business.

Dates must appear as: *DD/MM/YYYY*

Times must appear as *HH:MM* in 12-hour format with (AM/PM) suffix