Referral and Interest

Youth are referred or complete an interest form that has been recorded as "Program Enrollment Form". This form is used as the preliminary information gathering tool for contact, interest, and needs. This form is completed on paper by staff and then stored in a binder for future use.

Program Enrollment Form

Currently	Youth are referred or complete an interest form that has been recorded as "Program Enrollment Form". This form is used as the preliminary information gathering tool for contact, interest, and needs. This form is completed on paper by staff and then stored in a binder for future use.
SV Optimization	This form can be moved to a stand alone form that anyone in the public can complete, and then is deposited into SV as a referral form. The same information is presented to the user to be completed by the potential participant or referring person. Alternatively, this form can be created as a checklist within the client file to gather information on the client and deposit into various modules for future use. In each respect, moving the form into SV will eliminate the need for double entry by any staff.
Benefits	Instant File Creation, Full Admin Report, Future Reference, Guaranteed Completion Time Saved per Week: 0 minutes per person.

Client File

The following items will be used as the client file that is refreshed with each program referral to allow for requirements and due dates to renew. The client file will have a main dashboard that will display alerts and push the user to complete required tasks and forms.

Consent Form from United Way

Currently	PDF form that is printed by the staff and signed by the parent/participant. The document is stored in a binder.
SV Optimization	The client file will have an intake checklist that will lead the user to complete all the required documents including this document. The standard PDF can be downloaded from SV, printed and signed as is the current practice. However, the final document will be uploaded to the SV repository for future reference. The checklist will mark that the document was uploaded. An accompanied report can be pulled by administrative staff to show all participants across all programs and if this document has been uploaded.
Benefits	Task Tracking, Full Admin Report, Future Reference, Guaranteed Completion. Time Saved per Week: 0 minutes per person.

Confidentiality Agreement || Parent Consent Form School || Code of Conduct || Consent and Release

Currently	These documents are individual word documents that are printed out by staff and signed by participant/parents. The documents are stored in a binder.

SV Optimization	The client file will have an intake checklist that will lead the user to complete all the required documents including this document. Each document will be generated with one click and all pertinent information will auto-fill based off of the Program Enrollment Form. The participant/parent can sign the document online and the document is stored in the SV repository for future reference. The checklist will mark that each document was completed. An accompanied report can be pulled by administrative staff to show all participants across all programs and if this document has been uploaded.
Benefits	Work-flow Optimization, Task Tracking, Full Admin Report, Future Reference, Guaranteed Completion. Time Saved per Week: 0 minutes per person.

Contact Sheet || Tracking Sheet || Community Service Hours

Currently	All activity and interaction with the participants are documented in a word document. This document is sent to administration to be compiled into various reports.
SV Optimization	All activity is entered in SV with a simple form on the client file. Anyone with access to the file can view all time spent with that particular youth and activity conducted. This information is able to pull into any report, eliminating the need to send the document to anyone. Additional features will be added to ensure that staff are entering these notes contemporaneously and timely.
Benefits	Work-flow Optimization, Full Admin Report, Future Reference, Pull into Other Areas, Compilation Time Saved per Week: 30 minutes per person.

Program Monitoring

Throught the year, administration will seek to understand how well services are being performed, requirements are being fulfilled, and due dates are being met. Through program monitoring, reports will be allocated in various sections to allow all staff and supervisors to fulfill program objectives. These reports will start on the individual client records and roll-up to grouping reports on higher level monitoring.

Tracking Sheet

Currently	This document is the prinicpal mechanism for administration and supervisors to understand how well services are performed and to ensure that invoicing will be conducted without conflicts. This is an excel spreadsheet that is maintained by numerous staff, and is emailed and ultimately compiled and organized by various individuals.
SV Optimization	This report will be contructed into a one-click pull of informaiton. This report no longer needs to be maintained because it will pull information that is entered by the regular, daily basis by staff. As a result, the report will be available at any time by any person, will always be accurate, and will display information that is missing so that staff can enter the information on a timely basis.
Benefits	Work-flow Optimization, Instant Statistics/Data, Compliance of Regulations/Dates, Supervision Time Saved per Week: 30 minutes per program.

Mentor/Volunteer Tracking

Currently	An excel spreadsheet that lists names with contact information. This information has to be manually entered and updated to have an accurate account.
SV Optimization	Once a Mentor/Volunteer has been added to the system, they can be assigned to youth using the matching system described below. A report can be generated with one click to see all volunteers and mentors, their contact information, and status on partcipation with YLOT.
Benefits	Work-flow Optimization, Instant Statistics/Data, Supervision Time Saved per Week: 10 minutes per person.

Phone Contact || Transportation Schedules || Community Service Hours

Currently	Excel and Word documents contain various information collected from other documents, compiled and maintained by staff to be usable for various tasks and functions.
SV Optimization	Since the information is already in the system once, then anyone can pull the information with one-click reports without any additional work to compile and maintain. Each document can be emulated in SV and enhancements can be made with filters and better drill-down of information.
Benefits	Work-flow Optimization, Instant Statistics/Data, Supervision, Missing Information Checks Time Saved per Week: 60 minutes

New Referrals/Intake || Missing Progress Reports (Weekly Census) || Missing Invoices

Currently	These reports are managed by manually copying information from other documents.
SV Optimization	SV created reports to determine if information is missing and displays that as red-alerts to ensure that the data is collected. Tracking invoices, weekly census, referrals, and any other data-point is manageable through easy to follow reports. These reports are accessible from any devices at any time, so supervision can occur fluidly and no longer rely on manual compilation and human error.
Benefits	Work-flow Optimization, Instant Statistics/Data, Supervision, Missing Information Checks Time Saved per Week: 60 minutes

Reporting

SV leads YLOT to do less work with better results. If staff perform the work they are normally required to do, then supervision and adminstration simply pulls the information for final production.

Court Invoices || Progress Reports

Currently	Each staff person manully compiles the activity notes into a Word document that is sent to the court house.

SV Optimization	If notes are entered contemporaneously, then invoicing and progress reports are completed by clicking a date-range and the system will pull and compiles the notes automatically into the documents. Additionally, the notes are tracked to ensure that all notes have been reported for invoices and progress reports. A dedicated invoicing module is created to track all reported notes, print official invoices, but also to track the payment/denial of the invoices. These invoices can be sent directly to the probation officer through SV and that email is automatically documented in the file. A dedicated progress report module is created to track all reports. Administrative reports are created to ensure that every week the progress report is sent, an invoices are sent every month.
Benefits	Work-flow Optimization, Instant Statistics/Data, Supervision, Missing Information Checks Time Saved per Week: 45 minutes per participant.

Additional Thoughts

Additional modules and workflow can be optimized to ensure the entire YLOT team is working cohesively and in compliance with all rules and regulations.

Volunteers/Mentors	Volunteers and Mentors can be added to the company side with positions in the company. Limited access will be granted to volunteers and mentors, so that they cannot access information but can log time spend with youth for reports. Additionally, a master list can be created with a one-click button to display all volunteers and mentors with contact informaiton. Additioanl features that can be used are issuing incentives to volunteers that accrue a certain amount of time in a month or year. Rewards can be given to those who accrue the most hours throughout the year at the yearly banquet/recognition. If Volunteers/Mentors are given a choice of topics/themes, then SV can match those Volunteers/Mentors who share the same interests. This matching mechanism will be a fluid process and can display any youth that have not been matched with Volunteers/Mentors of like interests.
Transportation Schedule and Log	The transportation schedule can be managed within SharedVillage. When recording the youth for the first time, school, ward, and zipcode is documented. Additionally, by adding to the intake a daily drop/off and preference, all of the informaiton can be easily compiled in one-click reports to manage transportation. Tracking whether transporation has been provided can be completed in SV for the complete cost benefit analysis of transportation.