



Serving Counties Since 1886

# UNIFIED CASE MANAGEMENT (UCM)



County Criminal Justice  
Unified Case Management System  
*A program of the County Commissioners Association of Pennsylvania*

# Agenda

- Introductions
  - History
  - Overview
  - Status
  - Requirements to Join
  - Implementation
-

# What is the Problem?

- Separate Case Management Systems for Adult Probation, Jail and District Attorneys
  - Manual Data Entry
  - Data Quality Issues
  - Difficulties in Using Data for Management Decisions
  - Inefficient Offender Processing
-

# History

- 1988 – mid 1990's
    - Grant funded dos based systems
  - Late 1990's
    - Grant funded windows upgrades
  - Mid 2000
    - Grant funded web based for Jail
  - 2006-2010
    - Web based for AP
-

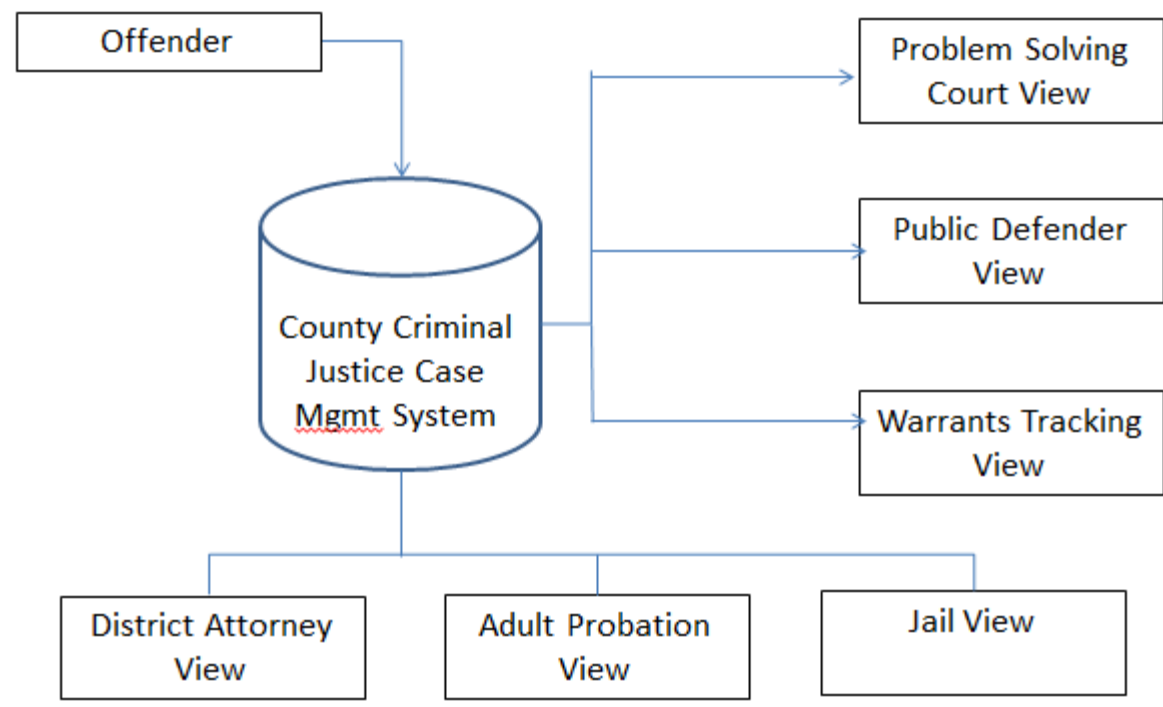
# History

- 2008
  - Data Quality Started
- Spring 2011
  - DQ Steering Committee
  - Microsoft Conference
- Summer 2011
  - Pilots Identified
- Fall 2011
  - Federal Grant Received

# What is the Solution?

- Core set of Offender Data
  - In one location
  - Accessible by appropriate criminal justice staff
  - With appropriate security roles
-

# CJ-UCM

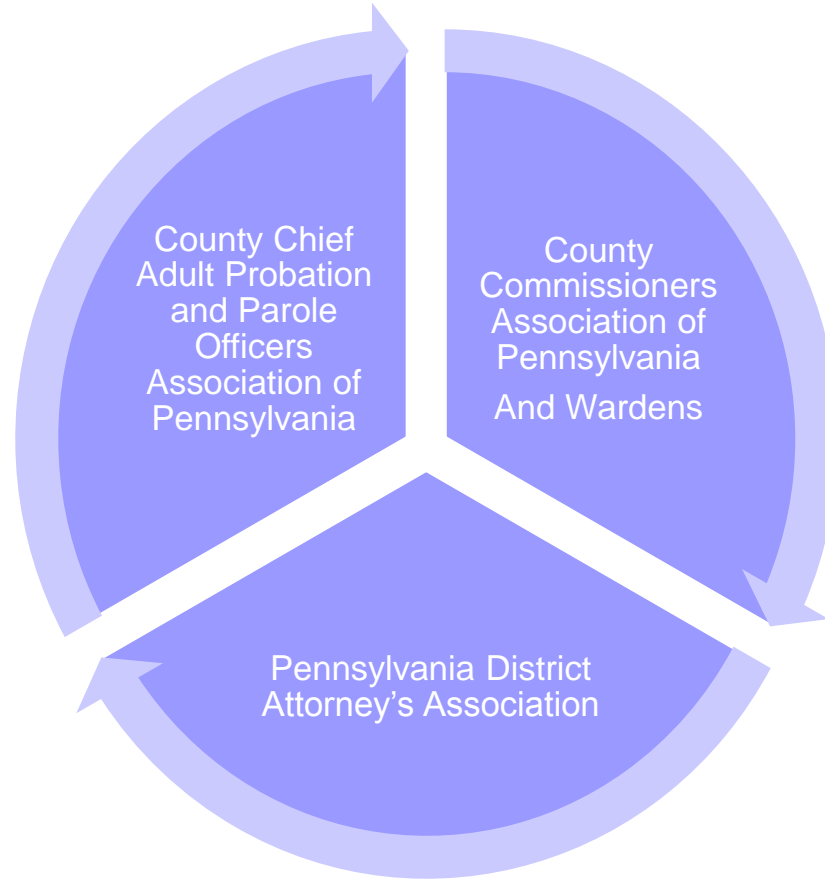


# GOVERNANCE





# UCM Implementation Teams



# Steering Committee

JDCAP  
County Chief Adult Probation  
PA Department of Corrections Digital Solutions Inc JCJC  
Jail records management systems PA Commission on Crime  
CCAP Juvenile Detention Centers Association of PA  
Parole JNET Pennsylvania County Corrections Association  
PCCA County Commissioners Association of Pennsylvania  
District Attorney records management system AP PA State Police  
CDI Inc Administrative Office of Pennsylvania Courts  
Parole Officers' Association of Pennsylvania Delinquency  
PA District Attorneys Association/Institute  
PCCD PA Juvenile Court Judges' Commission  
Pennsylvania Justice Network PA Office of Attorney General  
PA Commission on Sentencing AOPC  
PA Board of Probation

# Pilot Counties

- Blair (AP, Jail)
  - Beaver (AP & Jail)
  - Lebanon (AP & Jail & DA)
  - Northampton (AP, Jail, & DA)
  - Wayne (AP & Jail & DA)
  - Westmoreland (AP & Jail & DA)
-

# Implementation Team – County Led

- Allegheny
  - Beaver
  - Berks
  - Blair
  - Bucks
  - CCAP
  - Dauphin
  - Lancaster
  - Lebanon
  - Northampton
  - Warren
  - Wayne
  - Westmoreland
-

# What Features are included?

- Decreased Data Entry – Data Populated by means of AOPC Court Case Event Message
  - Incident/Case and Offender Management
  - Dept Management Tools (ex: caseload management)
-

# What Features are included?

- Alerts for Officer Safety, Business Intelligence and Notification to increase business productivity
- Dashboarding
- Advanced Reporting Features
- State JNET Error Reporting
- Data Interfaces (CPCMS, Inmate Phones, Commissary)

# What does UCM look like?

- Microsoft CRM 2011 Environment
- Let's take a look at the UCM Test Environment!



# UCM Active Offenders Dashboard

**Workplace** | Dashboard: **AP Manager Default Dashboard**

**My Work**

- Dashboards
- Activities
- My Calendar
- Office Calendar
- Imports
- Duplicate Detection
- Queues
- Articles
- Reports
- Announcements
- Submit Test Results

**CORE**

- Organizations
- Individuals

**CORE Modules**

- Offenders
- Cases
- Dockets

**Program Modules**

- Adult Probation

**Workplace**

- Settings
- Service
- Resource Center

**Individual (Offender) by Owner**

Active Adult Probation

Owner	Count
User, AP	32
Rita Reynolds	23
Other 1	17
Other 2	7
Other 3	27

**Probation by Offender Category**

Active Adult Probation

Owner	(blank)	ARD	MH
User, AP	26	1	0
Rita Rey...	7	0	0
Mark Pro...	16	1	0
Ethan Ho...	21	2	0
Heather ...	32	0	0

**Probation by Supervision Level**

Active Adult Probation

Owner	(blank)	Medium Supervision
User, AP	27	0
Rita Rey...	7	0
Mark Pro...	17	0
Ethan Ho...	22	1
Heather ...	32	0

**Adult Probation: Active Adult Probation**

Search for records

Name	SID (Offender)	Status	Supervision Level	Owner
Adams, Charlie Leon	123-45-67-8	Active	Medium Supervision	Ethan Houtz
Alexander, Brandon Michael	628-74-53-0	Active		Mark Proper
Allen, Christina Madison	628-74-80-5	Active		Ethan Houtz
Anderson, Richard Mason	628-74-21-4	Active		User, AP
Bailey, Maxwell Bentley	628-74-70-2	Active		Ethan Houtz
Baker, Elliott Nolan	628-74-62-2	Active		Heather Brown
Ballard, Maggie Elizabeth	628-74-07-2	Active		Heather Brown
Bell, Cameron Tristan	628-74-57-5	Active		User, AP
amantha	628-73-95-1	Active		Heather Brown



# UCM Active Offenders

Start Intake Dialog Offender In Lobby New Edit Activate Deactivate Delete Connect Assign Share Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Import Data Export to Excel Filter Advanced Find

Intake Dialog   Notices   Records   Collaborate   Process   Data

**Workplace**

- Activities
- My Calendar
- Office Calendar
- Imports
- Duplicate Detection
- Queues
- Articles
- Reports
- Announcements
- Submit Test Results
- CORE**
  - Organizations
  - Individuals
- CORE Modules**
  - Offenders**
  - Cases
  - Decks

Offenders: **Active Offenders**

<input type="checkbox"/>	Offender Name ▲	Suffix...	Date of Birth (L...	SSN	SID	Race	Home Phone (Indivi...	Mobile Phone (In
<input type="checkbox"/>	Adams, Charlie Leon	II	6/5/1900	982-12-3123	123-45-67-8	Black or African American		(717)-433-1346
<input type="checkbox"/>	Adams, Olivia Bella		4/20/1965	123-45-7777	628-73-90-0	Black or African American	(814) 503-0775	(717) 274-1757
<input type="checkbox"/>	Alexander, Brandon Michael		1/13/1981	137-47-8965	628-74-53-0	White	(717) 454-0048	(717) 274-1820
<input type="checkbox"/>	Allen, Christina Madison		2/9/1981	142-96-7907	628-74-80-5	Black or African American	(717) 454-0043	(717) 274-1847
<input type="checkbox"/>	Anderson, Richard Mason		9/20/1964	130-97-3554	628-74-21-4	White	(717) 454-0057	(717) 274-1788
<input type="checkbox"/>	Bailey, Maxwell Bentley	IV	1/30/1981	140-93-4964	628-74-70-2	Black or African American	(717) 106-8754	(717) 274-1837
<input type="checkbox"/>	Baker, Elliott Nolan		1/22/1981	139-30-8612	628-74-62-2	Black or African American	(717) 428-6776	(717) 274-1829
<input type="checkbox"/>	Ballard, Maggie Elizabeth		9/1/1981	128-12-7441	628-74-07-2	White	(814) 404-5507	(717) 274-1774
<input type="checkbox"/>	Bauer, Laura S	ESQ	4/1/1960					
<input type="checkbox"/>	Bell, Cameron Tristan		1/17/1981	138-29-2147	628-74-57-5	White	(717) 106-8752	(717) 274-1824
<input type="checkbox"/>	Briggs, Brianna Samantha		9/1/1981	125-25-4567	628-73-95-1	Asian or Pacific Islander	(814) 647-3793	(717) 274-1762
<input type="checkbox"/>	Brown, Nicole Stella		9/17/1982	128-73-7327	628-74-10-5	White	(814) 155-8587	(717) 274-1777
<input type="checkbox"/>	Campbell, Mason Michael		9/22/1964	131-38-0147	628-74-23-4	White	(717) 106-8740	(717) 274-1790

# UCM Offender - Alerts

Notifications - Medical, DNA Required, Megan's Law, Active Warrants, Suicide Risk

Alerts - Officer Safety, Increased Business Productivity, and Process Improvement Measures

Offender

**Adams, Charlie Leon**

Offenders ▾

↑
↓

Show/Hide Header ↕

Address	1235 Lake View Dr Apt 5 Harrisburg, PA 17111 (717) 433-1346 (c)	SSN	982-12-3123
Gender	Male	SID	123-45-67-8
Birthdate	06/05/1961	FBI No.	458149CDP
		Race	White
		Height	6'2"
		Weight	265

# Offender – Aggregate Views

**Related**

Legal

- (5) Charges
- (4) Sentencing
- (3) Dockets
- Hearings
- (6) Special Conditions
- Time Served
- (2) Programs

**Offender Information**

**General**

Individual \* [Adams, Charlie Leon](#)

Officer \* [Heather Brown](#)

**Demographics**

Status **Active**

# Adult Probation Web Portal



**UCM Offenders Portal**  
Online Service for County Adult Probation Offices

jbrandt@pacounties.org | [Logout](#)

## My Check Ins

Welcome to the portal. All your services are listed below.

### Check In Date/Time

7/30/2012 12:53:17 PM

7/25/2012 4:18:17 PM

7/13/2012 12:40:46 PM

7/11/2012 10:27:36 AM

7/5/2012 3:02:48 PM

Page 1 of 3 (12 items) < [1] 2 3 >



**Account Settings**  
[Click here](#) to manage account settings.



**New Web Check In**  
[Click here](#) to check in.



**Contact Probation**  
[Click here](#) to contact your probation officer.



**Court Ordered Journal**  
[Click here](#) to log to your court ordered journal.



**Personal Documents**  
[Click here](#) to view your personal documents.

### Current Address on File

1235 Lake View Dr  
Apt 5  
Harrisburg, PA 17111



**Address Change Request**  
[Click here](#) to change your address.



**Travel Request**  
[Click here](#) to request travel.



**Payment History**  
[Click here](#) view payment history.

# Timeline

- January through June 2012
  - Architecture and Prototype build
- June - August 2012
  - CORE, AP and District Attorney Pilot development and User testing, data conversion preparation starts
- September – October 2012
  - Jail Module Development
  - Data Conversion Testing

# Timeline

- November – First Quarter 2013
  - Data conversions, go-lives, determination of development and next steps.



# Status

- Pilot Testing in Progress
  - Web Portal testing – Sept 2012
  - Adult Probation Go Live – Oct 2012
  - DA Go Live – Nov 2012
  - Jail Finalization – Oct-Nov 2012
  - Next Phase – 2013
-

# Requirements to Join

- Application
  - MOU
  - Cost Estimates
  - Web Portal
  - Hardware and Software Minimums
  - Return on Investment
-



# Implementation

- Sign MOU
  - Participate in Data Quality
  - Complete Implementation Checklist
-

# Benefits

- Core data recorded and updated in a single county system
  - Improved case management efficiencies
  - Improved access to data for management decisions
  - Better ability to share data with state
-

# Other Collaboration Efforts

- PA Department of Corrections (DOC)
    - Selected same platform
    - Possible sharing of modules
  - Administrative Offices of PA Courts
    - Automated Messaging through Web Services
-

# QUESTIONS?

**Rita Reynolds**

Director of Technology  
Services and  
Telecommunications

[rreynold@pacounties.org](mailto:rreynold@pacounties.org)

**Mark Proper**

Deputy Director of  
Technology Development

[mproper@pacounties.org](mailto:mproper@pacounties.org)

**Deena Malley**

Contracted Project Manager

[dmalley@pacounties.org](mailto:dmalley@pacounties.org)

**Bob McCullough**

Adult Probation and Parole  
Officers Assoc of PA

[bigpine68@hughes.net](mailto:bigpine68@hughes.net)

**Rich Long**

PA District Attorney's  
Association

[rlong@pdaa.org](mailto:rlong@pdaa.org)

**Heather Brown**

Contracted Project Manager Assnt.

[hbrown@pacounties.org](mailto:hbrown@pacounties.org)