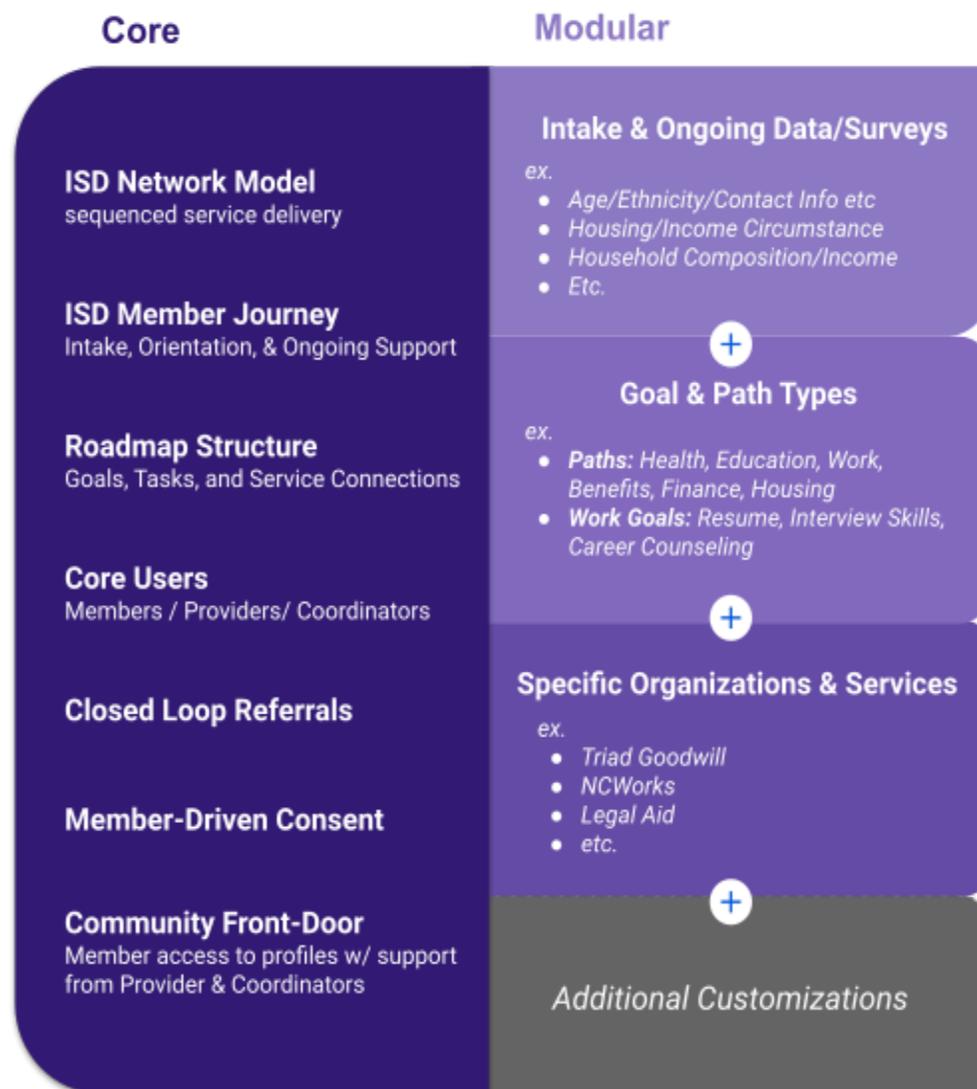


ISD Platform Modular Design

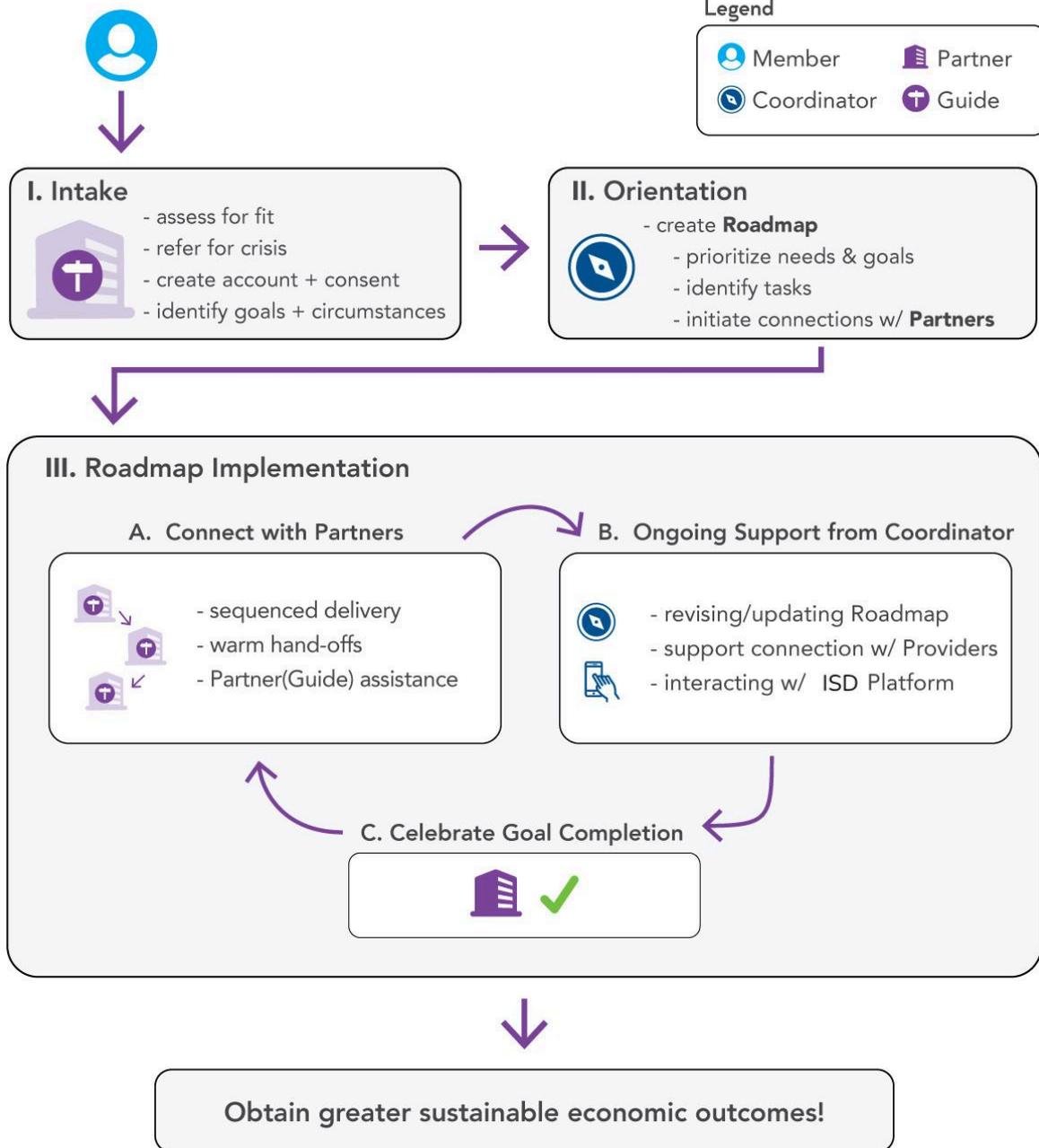
The ISD Platform is designed to facilitate the **Integrated Service Delivery (ISD) Network Model** in which “*community-based networks of nonprofit and public social services providers [use] the two-generation Integrated Services Delivery (ISD) approach to empower economically vulnerable households to achieve major economic outcomes.” From this foundation, the platform has a **Core Structure** that supports the implementation of ISD through a virtual network.

The ISD Platform is designed to flexibly adapt to the needs of various community implementations of ISD through a set of **Modular Components**. These components are customized through the discovery process and refined over time with ongoing feedback and improvements. **Additional Customization** can be made initially and over time to expand platform functionality to meet specific needs and opportunities.



*<https://www.mdcinc.org/integrated-services-delivery-and-social-determinants-of-health/>

ISD Platform Member Journey



Appendix

ISD Platform Features

Member Profile - *centralized info about Members and their progress*

- Profile photos
- View and update contact information
- View and update account information
- Demographics, household, and eligibility information
- Top tasks (based on Roadmap priority)
- Meeting accommodations (reading/writing support, ADA, interpretation, translation, etc.)
- Timeline of meetings, task/goal completion, notes, service connections, etc.
- Current assigned Coordinator
- Current/pending Service Connections
- File management - upload and update files/attachments
- Customizable notifications

Roadmap - *sequenced plans composed of Members' goals, tasks, and related service connections*

- ISD Paths and Goal Types
- Custom Paths and Goal Types
- Member can share/input specific goals and motivation
- Define priority/sequence
- Tasks that support goal completion
- Services Connections that support goal completion
- Visual indicators of Goal/Path progress

Connections - *links between Members and Partners (service providers)*

- Services Connections recommended to Members based on goals & eligibility
- Add existing service connection
- Request new service connections
- Workflow for providers to accept/not accept service connection requests
- Assign Provider staff to specific Members
- Update Service Connection over time
- Coordinator review/approval process for connections requests

Service/Organization Profiles - *centralized Orgs/Service info*

- Organization/Service name and alternate/abbrev. names
- Service description
- Specific and general eligibility requirements
- Documents required to access service
- Contact information
- Accessibility information (public transit, cost, language/interpretation, ADA)
- One or multiple offices
- Organization logos
- Organizations/Services connected to users in the platform (Core Partners) in addition to organizations/services outside the platform (Referral/External Partners)

Provider/Guide Profiles -*centralized Guide info*

- Profile photos
- View and update contact information
- View and update account information
- Training & role information
- Top Tasks (based on priority)
- Timeline of meetings, task/goal completion, notes, service connections, etc
- Active/Requested/Inactive Service Connections
- Customizable notifications

Coordinator Profiles/Features -*centralized Coordinator info*

- Profile photos
- View and update contact information
- View and update account information
- Training & role information
- Top Tasks (based on priority)
- Timeline of meetings, task/goal completion, notes, service connections, etc
- Active/Inactive Members & Requested Orientations
- Customizable notifications
- Calendar availability visible for scheduling network Orientations
- Assignment/reassignment to specific Members
- Platforms enable direct Member support through:
 - Roadmap creation/prioritization/management
 - Task creation and assignment
 - Preparing, requesting, & reviewing Service Connection requests
 - Scheduling regular appointments
 - Direct messages
-

Org Admin Profiles -*centralized admin/manager info*

- Profile photos
- View and update contact information
- View and update account information
- Training & role information
- Top Tasks (based on priority)
- Timeline of meetings, task/goal completion, notes, service connections, etc
- Active/Requested/Inactive Service Connections
- Customizable notifications
- Team View of guides in your organization w/ overview of services, # requested/active connections, and date of last activity
- Org/Service-specific reporting & outcomes

Tasks - *coordinating todos related to Member progress*

- Subject & descriptions
- Due Dates
- Assign to Members/ Providers/Coordinators
- Attach to specific Paths/Goals

Documents - *uploaded & organized files*

- Upload & update various file types
- Share with providers
- Relate to specific Paths/Goals

Events - *scheduled meetings and notes*

- Scheduled Meetings
- Meeting Notes
- Attendees

Intake, Path Specific, and Check-in Surveys - customizable question sets to solicit data from users once and over time.

- Custom question structure/flow
- Smart logic and decision trees
- Text-based content
- Video content
- Audio content
- Dynamic FAQs
- Question Features
 - Various types: single-select, multi-select, lookup, true/false, text, text area, rich text, satisfaction ratings, numbers, currencies, Likert scale, date, date-times, dependent picklists, lookup/reference fields
 - Piping: populate response options from previous questions
 - Branching
 - Complex skip logic
 - Optional/required responses
 - Help Text / Instructions
 - Static responses
 - Responses over time w/ response history
 - Custom or automated scoring

Data Sharing, Privacy, and Consent - control over user data

- Network and Media Consents
- Member choose which parts of their data/profile to share with partners
- Member request data removal
- Member provided with copy of their data upon request

Notifications - email/text/platform messages to nudge engagement

- For Members/Guides/Coordinators
 - Member status
 - Welcome message, orientation appt., etc.
 - Meetings/Updates
 - Meeting scheduled, meeting reminder, Meeting update, general notes
 - Tasks
 - Task assignment
 - Task completed related to Member
 - Connections
 - Response to request
 - New Service recommendations
 - New Path Questions available
 - Connection Requests without any activity after x days
 - Messages
 - Direct messages between all users.
 - Notifications when received from Guide/Provider/Coordinator/Member/network announcements

Reporting -metrics about network performance and impact

- General Features
 - Each Member/Provider has unique auto-generated ID
 - Reminders via text/email/in-platform
 - Schedule Check-in Surveys at custom interval
 - Single or repeated measures
 - Demographic data
 - Roadmap Progress data
 - Network Composition data
 - Custom Reports
 - CSV download raw data
- **Members & Partner Output/Outcome Data**
 - # of New/ active/inactive Members
 - # of Tasks Created/Completed
 - # Connections Requested/Active/Inactive (by Partner/Service/Path/Goal)
 - # Goals Created / Completed
 - # of Network Services (by Core/Referral/External)
 - # of Network Services (by Path/Goal Type)
 - # of Network Partners (by Core/Referral/External)
 - # of services (by Core/ Referral/External)
 - Avg Caseload (per Coordinator/Org/Service/Guide)
 - Satisfaction by Path (Housing/Work/ Finance/ etc)
 - Change in Satisfaction by Path
 - Change in work/housing/health/income/financial/ circumstances
 - Custom data points TBD by custom intake/path/check-in survey data

Reporting (Continued)

- Member Demographics
 - Race & Ethnicity
 - Gender
 - Age
 - Household Composition
 - Income Levels
 - # in Household
 - #Adults Total
 - # Children Total
 - Veterans
 - Disability
 - Custom data points TBD by custom intake/path/check-in survey data
 - Filter output/outcome by demographic data

General Platform Information - branding/accessibility/security

- Mobile and Browser Friendly
- Dynamic FAQs & Help Text
- Network Feedback & Support Systems
- Data Backups
- Multi-Browser Compatibility
- Multi-Factor Authentication
- Members have direct access to their Profiles.
- Branding - color and logo integrated into the platform

ISD Platform Screenshots

GUIDED INTAKE

Join the Network!

Follow along to understand what it means to join the Network! Already a member? [Click Here to login!](#) [Print](#)

1 Introduction

The ISD Network is a county-wide, mobile-friendly network that connects you and your household to services and a coordinator who will work with you to identify, plan, and achieve financial stability and your personal goals. Work with a coordinator to build your roadmap to success, your way, on your time, at your own pace, with local partners supporting you all along the way.

2 Becoming a Member

In order to become a member of ISD Network you must:

- Be at least 18 year of age
- Agree to the ISD Network Data Collection & Consent Agreement

What if I decide not to join? How can I protect my identity? I'm experiencing a crisis, can you help?

How do I know this is a good fit?

[Get Started](#)

Build Your Profile

<language about why/ what> Lorem ipsum dolor sit amet, consetiam, quis nostrud exercitation ullamco laboris nod tempor incididunt...

About You

Gender

Birthday

Mar | 17 | 1959

Location: How long have you lived in Guilford county?

Years | Months

|

[Next](#)

Meeting Preferences

The following questions will help us match you with a coordinator that can support your specific goals, preferences, and circumstances! We'll do our best to accommodate your preferences but can't always guarantee it!

Your Preferences (select all that apply)

Reading Support Writing Support ADA Accessible Interpretation Translation

Preferred spoken language:

Preferred written language:

Other Preferences:

[Next](#)

Registration

Complete this section to create an account that you and/or your coordinator can use to keep track of your goals, connections to services, and more! [Print](#)

Network Consent

- I am living in and want to pursue services in this area.
- I am at least 18 years of age.
- I want to create a long-term plan toward some of my goals in the areas of health, income, housing, employment, education, and finances.
- I am available to communicate regularly with providers and coordinators to work towards my goals.
- I agree to the [Mutual Expectations & Member Agreement](#)
- I agree to the [Data Collection & Consent Agreement](#)

Initials

(required) by entering my initials here I agree to all the statements above

Media Consent

Initials

(optional) by entering my initials here I agree to the [Media Release](#)

Member offered verbal consent to initial the above consents/agreements on their behalf

[Next](#)

GUIDED INTAKE & GOAL IDENTIFICATION

Create Account

First Name Last Name

Preferred Name / Nickname Pronouns

Email

You'll need to confirm this email belongs to you.

Create Password Verify Password

Use 8 or more characters and a mix of letters, numbers & symbols

Your password must:

- ✓ Be at least 8 characters
- ✓ Not contain your name or email
- ✓ Include at least one uppercase letter
- ✓ Include at least one number
- ✓ Include at least one symbol

Done Set Your Goals >

Path Selection

Are you currently seeking support for any of these basic needs?

Safety Shelter Food

Which Success Paths are you interested in pursuing in the next year?

A Success Path is a collection of goals that you have for you and your household. You can change your Paths whenever you like!

Health Benefits Finance Education Work Housing

Next >

Schedule Orientation with a Coordinators

Find a time that works for your schedule!

Format: In Person Video

Date & Time:

May

Tue 18 Wed 19 Thu 20 Fri 21 Sat 22

10:00 am 11:00 am 12:00 pm

1:00 pm 2:00 pm

Coordinator:

Stephanie Ritchie

In Person Phone Video

English, Spanish

Guilford Community Care Network

612 Pastour Dr.

Greensboro, NC 27403

Schedule It!

Goal Type Selection

Work

What types of **Work related goals** do you want to pursue? (select all that apply)

Resume Interview Skills Job Search Career Counseling

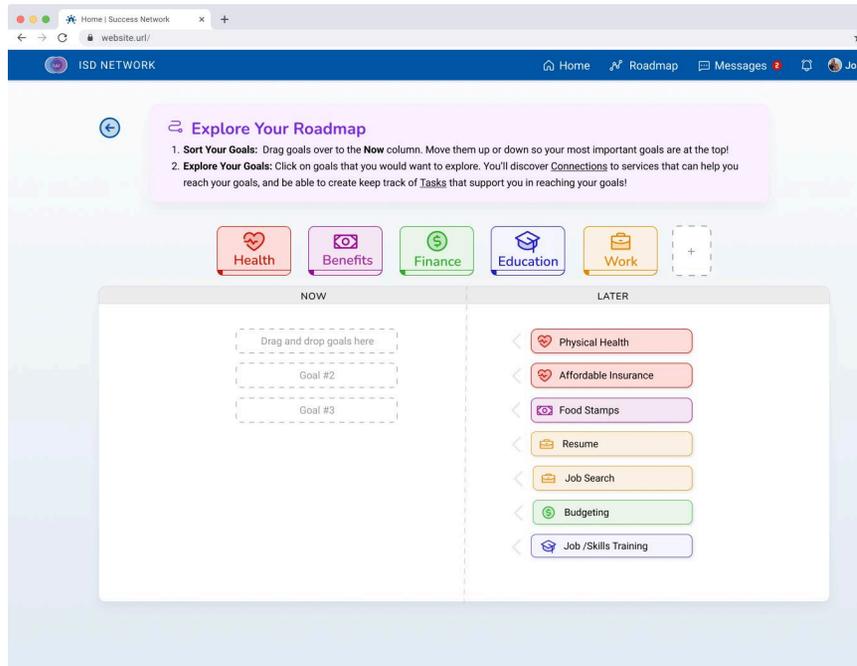
Getting Promoted Self Employment

Custom

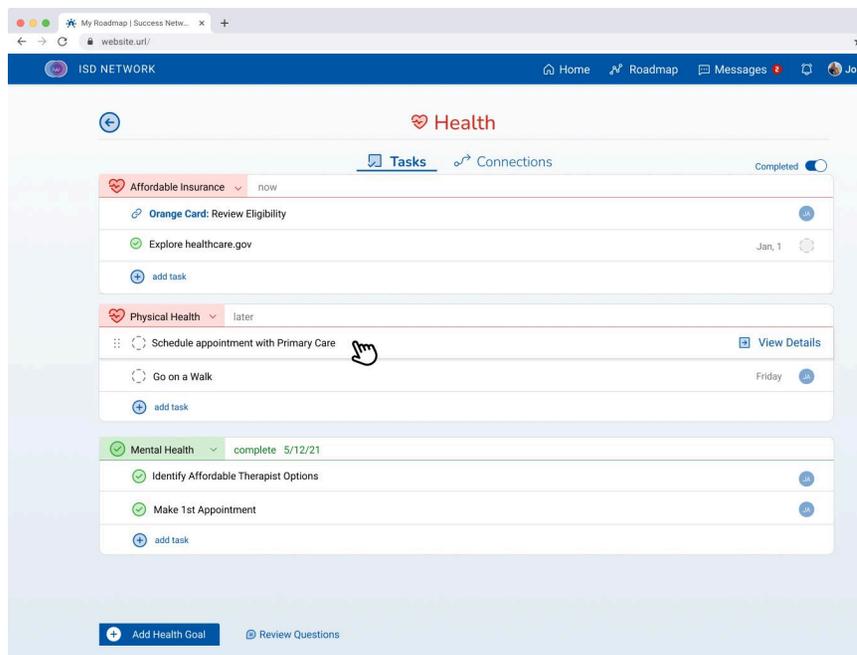
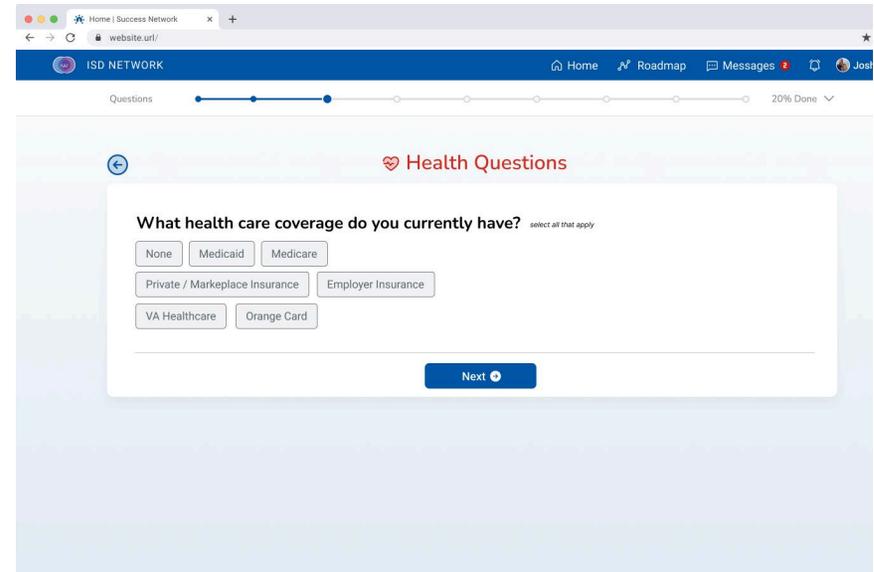
Notes (optional)

Done >

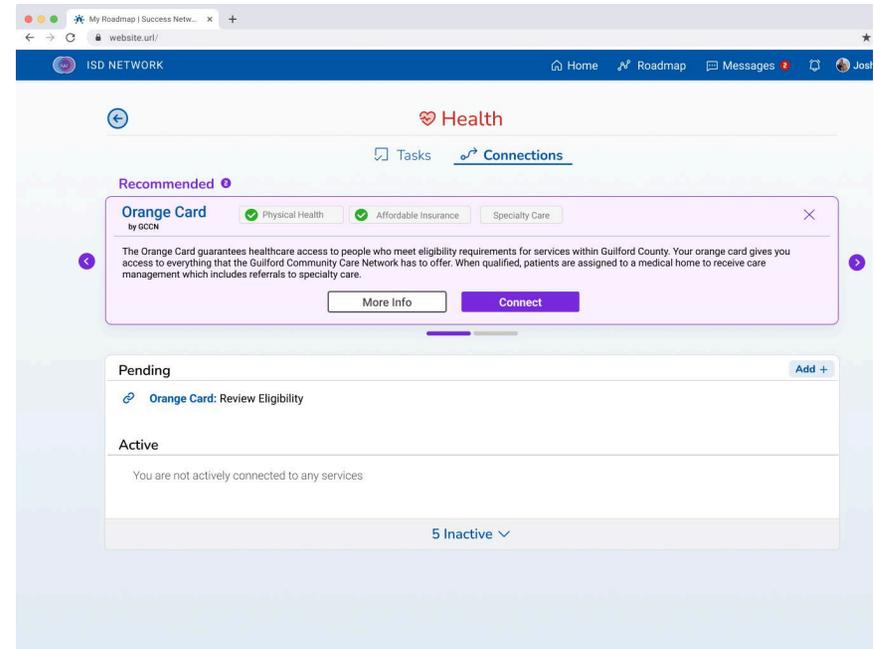
ROADMAP CREATION & ACTION PLANNING



Path Questions



Recommended Service Connections



SERVICE CONNECTIONS

Job Seekers

Employment Worx

Service Contact Info

336-555-5409

careerforward@empworx.com

eworkxguliford.org/careerforward

Accessibility

Free

In-Person | Via Web

English | Spanish

Other Services by Employment Worx

- Resume Ready Program
- Train4Success

Active

Description

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam.

Goals Met

- Physical Health
- Affordable Insurance
- Specialty Care

Specific Eligibility

- Adult
- NC Resident
- Disabled
- Household Income < \$51,000

Additional Eligibility

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Lorem ipsum dolor sit amet.

Required Documentation

- Lorem ipsum dolor sit amet consectetur
- Tempor incididunt ut labore et dolore magna (tenim ad minim)
- Veniam quis nostrud exercitation ullamco

Main Office (Location 1 of 2)

1301 Franklin Dr, Greensboro, NC 27407

336-555-5409

Open Now Monday-Friday 8am-5pm

info@empworx.com

3 minute walk from the S Stop

Service Connection

Orange Card by GCCN

Review Eligibility

Attach Documents & Notes

Instructions

Attach required/helpful documents and or notes that you would like to share with this Provider.

Required Documents

- Proof of Income and Assets
- Proof of Guilford County Residency
- Photo ID

Attach Documents

Share Notes (optional)

Save & Continue

Set Sharing Preferences

Submit

Last updated April 6, 2022 11:03 AM by Stephanie Ritchie

Service Connection

Orange Card by GCCN

Review Eligibility

Attach Documents & Notes

Instructions

Attach required/helpful documents and or notes that you would like to share with this Provider.

Required Documents

- Proof of Income and Assets
- Proof of Guilford County Residency
- Photo ID

Attach Documents

Share Notes (optional)

Save & Continue

Set Sharing Preferences

Submit

Last updated April 6, 2022 11:03 AM by Stephanie Ritchie

Service Connection

You did it!

Congrats on sending your request to connect with Orange Card. They will update your status soon!

Orange Card by GCCN Requested

Next Steps

Call 555-703-4421 to schedule your first appointment. Make sure to tell them you submitted a Success Network Referral.

Back to Tasks

Shared: Basic Details Contact Info Roadmap

Last updated April 6, 2022 11:03 AM by Stephanie Ritchie

PROVIDER GUIDE & ADMIN PROFILES

Tasha Kinlaw
Service Coordinator
GCCN
Intake | Services

English, Spanish

336-555-5309
tashak@empworx.com

Active Connections

- Nathaniel Daniels
- Brian Stallman
- Dorothy Welch

Services

- Orange Card
- Specialty Care

Top Tasks

- Schedule Meeting with Brian Stallman (Friday)
- Research Job leads for Nathaniel Daniels (July 12)
- Follow-Up with Dorothy Welch (July 20)

Timeline

- Josh Adams | Member
In person meeting at GCCN (Tuesday 10:30am)
- Stephanie Ritchie | Coordinator
video meeting via Zoom (Today 2:00pm)
- NEW CONNECTION
Corey Adams was referred by Jack Mathews for the Orange Card Service. (5 hrs ago)
- CELEBRATE!
Christian Bailey completed the Specialty Care Service! (1 wk ago)

Task Management

Tasks
Assigned to Me

Title	Member Profile	Assigned To:	Due
Schedule Meeting with Brian		10	
Research free phone options	Brian Stallman	10	
Research Job leads	Nathaniel Daniels	10	July 12
Follow-Up with Dorothy	Dorothy Welch	10	July 20
Schedule Meeting with Brian Stallman		10	Friday
Research Job leads for Nathaniel Daniels		10	July 12

Receiving Connection Requests

Jack Danson's request to connect with Orange Card

Assigned To: Tasha Kinlaw | Status: New Request | Date of Change: 05/03/22

Connection Request

Member: Jack Danson
Preferred Contact: 555-555-5555
Coordinator: Stephanie Ritchie

Updates

Stephanie Ritchie: I spoke to Josh on the phone and he is going to send an updated copy of his ID Card.

Stephanie Ritchie: Changed Orange Card connection status to Reviewing

Connections
Requested

Member	Status	Service	Guide	Last Activity	Requested
Jack Danson	New Request	Orange Card		1 Day	July 20, 2022
Nathaniel Daniels	Reviewing	Orange Card	10	2 Days	July 12, 2022
Dorothy Welch	Waitlist	Specialty Care	10	3 Days	July 1, 2022
Max Devine	Pending Confirmation	Specialty Care		2 Week	July 1, 2022

Team Management

Team

Name	Role	Services	Requested	Active	Last Activity
Jack Danson	Manager	All	0	0	1 Day
Nathaniel Daniels	Guide	Orange Card	1	5	1 Week
Tasha Kinlaw	Guide	Specialty Care	2	8	3 Weeks

NOTIFICATIONS & REPORTING

Customizable Notifications

The screenshot shows the 'Account Settings' page for 'ISD NETWORK'. The 'Login Info' section includes an email field with 'joshiejosh89@gmail.com' (Verified) and a password field with a 'Change Password' link. The 'Notifications' section is expanded, showing various notification categories with 'Email' and 'Text' toggle options:

- Send my notifications to:** Fields for 'Email Address' and 'Phone'.
- Meetings & Updates:**
 - I'm scheduled for a meeting (Email, Text)
 - Meeting reminders (1 day before) (Email, Text)
 - A meeting update is entered (Email, Text)
 - A general note is entered (Email, Text)
- Tasks:**
 - A new task is assigned to me (Email, Text)
 - Someone else completes a task related to my profile (Email, Text)
- Services/Connections:**
 - A provider responds to a service connection (Email, Text)
 - A new service recommendation is available (Email, Text)
 - A new set of roadmap questions are available (Email, Text)
- Messages:**
 - A guide/provider messages me (Email, Text)
 - A coordinator messages me (Email, Text)
 - A network announcement is made (Email, Text)

Organization/Service/Network Reporting

The screenshot shows the 'Reports' dashboard for 'ISD NETWORK'. It features two main sections: 'Member: Identity' and 'Education'.

Member: Identity (Last 3 Months):

- 414 Total Members** (1211 Household Members, +10% from previous)
- Household Composition:** 25% individuals, 20% single parent family, 15% multi-parent family.
- Household Members:** 25% adults, 20% children.
- Other Identities:** 25% Veterans, 20% Disabled.
- Age:** 25% 0-18, 20% 19-24, 15% 25-34, 10% 35-44, 8% 45-54, 7% 55-64, 3% 65.
- Gender:** 46% male (only value), 40% female (only value), 14% multiple values.
- Ethnicity:** 25% White, 20% Multiple values, 15% Hispanic, 10% Black, 8% Asian, 7% Native, 3% Middle Eastern, 2% Hawaiian/Islander, 10% No Response. Also: 42% Hispanic (any value), 32% Black (any value).

Education (Last 3 Months):

- +12% Avg. change in FPL** (80% Avg. Initial, 92% Avg. Updated, 80% (120) Positive Change, 12% (10) No Change, 08% (8) Negative Change)
- +\$121 Avg. change in income** (80% Avg. Initial, 92% Avg. Updated, 80% (120) Positive Change, 12% (10) No Change, 08% (8) Negative Change)
- 40 Households over 100% FPL for the 1st time.**
- +1.2 Avg. change in satisfaction** (3.0 Avg. Initial, 4.2 Avg. Updated, 80% (120) Positive Change, 12% (10) No Change, 08% (8) Negative Change)
- 212 Connections w/ activity** (122 Created, 112 Requested, 100 Accepted, 3 Rejected, 2 Withdrawn, 200 Completed)
- 31 Increases in highest level of education**
- +1.6 Avg. change in satisfaction** (3.0 Avg. Initial, 4.2 Avg. Updated, 80% (120) Positive Change, 12% (10) No Change, 08% (8) Negative Change)
- 142 Connections w/ activity** (122 Created, 112 Requested, 100 Accepted, 3 Rejected, 2 Withdrawn, 200 Completed)
- 21 Improvements in job circumstances**