

# JIDS TO UNITY MIGRATION CHECKLIST

## WHAT STEPS SHOULD I TAKE TO PREPARE FOR MIGRATION?

### CHANGE SETTINGS, SEPARATE & RENAME DOCUMENTS IN JIDS

- ✓ To ensure that documents are easily identifiable when migrated to UNITY, all users are encouraged to edit the viewer settings in JIDS so that uploaded documents enter the file with the physical file name.
- ✓ When adding new documents, be sure to separate and name them appropriately.
- ✓ Ensure all active Transfer of Supervision cases have an e-Form IV with the "Anticipated Placement Date" included.



### JIDS DATA REVIEW & CLEAN UP

- ✓ Delete or close JIDS files without any workflow and review potential duplicate files to reconcile.
- ✓ If file is a true duplicate and has workflow, states must follow the Duplicate File Resolution process before deleting the file.



## FIELD OFFICER ENGAGEMENT

- ✓ Speak with JPOs and inquire if youth are eligible for release based on completing all requirements of their supervision. Ask JPOs to submit a request for case closure on appropriate cases.

## ONGOING CASE REVIEW

### JIDS ACTIVE CASE REVIEW

- ✓ Review active cases with case closure dates. Active cases should not have closure dates.
- ✓ Determine if any files have a "Date file entered" in the future and correct the date.
- ✓ For Travel type files, close file if travel is complete. If a Travel case turned into a Transfer of Supervision, ensure the TYPE is changed to Transfer.
- ✓ Review and clean up case audit Excel spreadsheets sent by the National Office.
- ✓ Model 1 & 2 States: Keep user profile SmartSheet updated.
- ✓ Run JIDS Report: "Pending Quarterly Progress Report Detail Report"
  - Address past due QPRs
  - Advise JPOs/JPSs to complete May QPRs in JIDS as soon as appropriate



### JIDS MIGRATED CASE REVIEW

- ✓ Prepare staff to review data post-migration during the transition period. This will include due dates of active cases. This task may require multiple reviewers/people for Compact offices with large caseloads.
- ✓ UNITY Coordinators: Continue to attend update sessions on Wednesdays at 1:00 pm EST.

