

STAAND Release 3.4 — AI Module Release Notes

Release Date: September 18, 2026 Module: AI User Stories: 17 Bug Fixes: 0

Overview

This release introduces the new Smart Draft capability for Contact Notes within the STAAND AI module. Smart Draft combines structured guidance, AI-assisted information extraction, and deterministic narrative generation to help workers create consistent, program-aligned documentation while preserving existing free-write workflows. The release also establishes the governance, security, accessibility, performance, and operational foundations required to support Smart Draft safely across multiple program areas.

Release 3.4 focuses heavily on reliability, auditability, and worker usability. Program administrators can now manage approved drafting templates without application code changes, while workers can seamlessly move between guided drafting and traditional note entry. The release also delivers phased onboarding of program templates, advanced validation and factuality protections, end-to-end recovery handling, and operational controls for rollout and rollback.

New Features & Enhancements

Smart Draft Governance and Template Administration

- **#104299 — Create governed Smart Draft template catalog and immutable versioning:** STAAND now includes a governed Smart Draft template catalog that allows authorized program teams to create, review, publish, retire, and revoke drafting templates without requiring runtime application updates. Published template versions are immutable, ensuring that workers always draft against a stable and approved version. Separate author, reviewer, and publisher responsibilities help enforce governance and reduce the risk of unapproved changes. The system also distinguishes between retiring a template and revoking one, giving administrators greater control when managing outdated or invalid guidance. Workers will only see currently approved templates that apply to their scenario and effective dates.
- **#104305 — Provide Smart Draft template authoring, preview, review, and publishing:** Authorized program staff can now manage Smart Draft templates through a guided administration experience instead of editing technical configuration files directly. Administrators can create or clone templates, configure sections and questions, preview the worker experience across different screen sizes, compare version changes, and validate examples before publishing. Built-in safeguards prevent self-approval and require validation before release. This improves governance, reduces technical barriers for program teams, and allows template updates to be managed more efficiently and safely.

Contact Note Drafting Experience

- **#104300 — Extend persistent Contact Note drafts with Smart Draft state v2:** Contact Note draft persistence has been enhanced to support Smart Draft workflows while maintaining compatibility with existing manual drafts. Drafts now retain additional information such as selected template versions, structured answers, generated narrative sections, identified gaps, and AI generation status. Workers can use Save Draft & Exit and Resume while preserving the exact drafting state across sessions and devices. Existing drafts continue to function normally, and the update was designed to safely handle future draft schema changes without requiring bulk migration activity.
- **#104301 — Build the adaptive Smart Draft worker composer in Contact Notes V2:** The Contact Notes V2 drafting experience now supports a flexible Smart Draft composer that combines guided entry and free-form writing in a single responsive interface. Workers can choose an approved guide or switch to

free-write mode at any time without losing progress. The composer supports typing, pasting, native device dictation, imported content, and structured guided responses together on one screen. Progressive disclosure reduces visual overload by showing questions only when relevant, while source information and guidance remain easily accessible throughout the drafting process.

- **#104302 — Implement deterministic Smart Draft rendering and gap rules:** Smart Draft narratives are now rendered deterministically from approved templates and structured answers rather than relying on AI-generated formatting logic. This ensures that narratives follow consistent program standards and that required information is validated before Review & Save becomes available. The system distinguishes important states such as Not Asked, Declined, Unknown, Not Applicable, and Follow-up required, improving documentation clarity and data quality. Updating an answer refreshes only the affected narrative sections, helping workers maintain context while editing.
- **#104304 — Integrate Smart Draft with Review & Save and duplicate-safe finalization:** Smart Draft has been integrated into the existing Review & Save process for Contact Notes. The workflow preserves current certification and validation requirements while ensuring that finalized narratives cannot change during submission. Additional protections prevent duplicate Contact Notes from being created during retries or interrupted submissions. Finalized records now store Smart Draft and template provenance information to support auditing and traceability.
- **#104495 — Complete worker-device Contact Note draft finalization and recovery certification:** The end-to-end Contact Note finalization and recovery process has been fully validated using real non-administrative worker sessions across desktop and supported mobile environments. The workflow now safely handles interrupted submissions, uncertain network responses, closed-case recovery scenarios, participant recovery warnings, and attachment reconciliation. Duplicate note creation prevention was verified using correlation tracking, ensuring that retries result in exactly one official Contact Note. This work strengthens confidence in real-world recovery and certification scenarios for frontline staff.

AI-Assisted Extraction and Quality Controls

- **#104303 — Fill Smart Draft answers from worker notes using grounded AI extraction:** Smart Draft now includes server-side AI-assisted extraction that can populate structured answers from typed notes, dictated content, OCR text, and imported documents. The extraction process validates all outputs against approved template structures and requires source evidence for every AI-populated value. Contradictions and unsupported values are surfaced as gaps instead of silently accepted. Additional protections prevent stale or duplicate requests from overwriting valid data or triggering unnecessary model costs.
- **#104311 — Establish Smart Draft factuality and AI quality evaluation:** A comprehensive evaluation framework has been implemented to measure Smart Draft factuality, consistency, and AI safety across all supported templates. The framework uses synthetic and de-identified datasets to test extraction precision, contradiction handling, quote preservation, multilingual input handling, and prompt injection resistance. Release thresholds now block deployments if quality or safety regressions are detected, helping ensure that Smart Draft outputs remain trustworthy and program compliant.

Program Template Rollouts

- **#104306 — Onboard Smart Draft Wave 1 - Education Day Care and Referral Submitted:** The first Smart Draft template rollout includes Education/Day Care and Referral Submitted templates. These lower-complexity templates establish the initial production-ready Smart Draft experience while validating accessibility, latency, factuality, and user acceptance requirements. Applicability rules help prevent workers from selecting inappropriate referral pathways.
- **#104307 — Onboard Smart Draft Wave 2 - Household Reporter and Parent Caregiver:** Wave 2 expands Smart Draft support to Household Members, Reporter, and Parent/Caregiver templates. These

templates introduce more advanced behaviors such as repeatable people and attempts, allegation attribution, conditional guidance, and sensitive history handling. Additional safeguards were implemented to prevent unsupported denials or unsupported factual claims from appearing in generated narratives.

- **#104308 — Onboard Smart Draft Wave 3 - Medical Care Child Assessment and CAC:** Wave 3 introduces Smart Draft templates for Primary Medical Care, Child Assessment, and Child Advocacy Center documentation. These templates include enhanced protections for medical and forensic content, exact preservation of direct child statements, and stricter handling of negative findings and mutually exclusive medical conditions. Legal and program review processes were incorporated before approval.
- **#104309 — Onboard Smart Draft Wave 4 - Court Medical Evaluation and Closure:** The final onboarding wave adds Family Court, Investigation Medical Evaluation, and Investigation Closure Summary templates. These higher-risk templates include detailed protections for allegations, court orders, medical conclusions, dispositions, and closure recommendations. The release emphasizes exact preservation of grounded content and formal legal and program approval processes before publication.

Security, Performance, Accessibility, and Operations

- **#104310 — Harden Smart Draft security privacy and audit:** Significant security and privacy protections were added throughout the Smart Draft platform. The system now enforces least-privilege access, stronger caller attribution, role separation for template administration, and protections against prompt injection attempts. Sensitive case content, prompts, completions, authentication details, and stack traces are excluded from telemetry and logs. Audit records now capture only safe identifiers and usage information while using approved managed identity and networking practices.
- **#104312 — Meet Smart Draft performance cost and resilience targets:** Smart Draft now includes extensive resiliency and performance controls designed to improve responsiveness and reduce operational costs. Features include request deduplication, extraction caching, bounded retries, timeout handling, concurrency controls, and graceful degradation to free-write mode during outages or quota limits. Guided drafting typically operates without requiring AI model calls, helping improve response times and cost efficiency while preserving worker input during failures.
- **#104313 — Validate Smart Draft accessibility responsive UX and usability:** Comprehensive accessibility and usability validation has been completed for the Smart Draft experience across desktop, modal, mobile, keyboard, screen reader, zoom, high contrast, and touch scenarios. The interface now supports semantic controls, proper focus handling, responsive layouts, and accessible navigation behaviors. Workers can complete guided and free-write drafting tasks without relying on training-specific workarounds, improving usability for a broader range of users.
- **#104314 — Deliver Smart Draft ALM observability rollout and rollback:** Operational support for Smart Draft deployment and lifecycle management has been implemented through supported application lifecycle management (ALM) processes. The release packages templates, APIs, feature flags, dashboards, telemetry, deployment guidance, and rollback procedures together to support safer releases. Organizations can now selectively enable Smart Draft for approved teams or templates while monitoring latency, cost, stale results, and failures through centralized observability tooling. Rollback procedures preserve worker drafts and existing data.

Bug Fixes

No bug fixes were included in this release for the AI module.

Summary

STAAND Release 3.4 delivers the foundational Smart Draft platform for AI-assisted Contact Note creation. The release combines governed template management, structured drafting, AI-assisted extraction, deterministic narrative rendering, accessibility validation, and operational safeguards into a unified experience designed for frontline workers and program administrators. With phased template onboarding, extensive safety controls, and resilient recovery workflows, this release establishes a scalable and secure framework for future AI-assisted documentation capabilities within STAAND.