

Intake Redesign – Changes to the Intake Workload Screen



Knowledge Base Article

Intake Redesign – Changes to the Intake Workload Screen

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Intake Redesign – Changes to the Intake Workload Screen

Overview

This article describes changes to the **Intake Workload** screen as a result of the **Intake Redesign** that will be implemented in **SACWIS Build 3.06**. The changes will include:

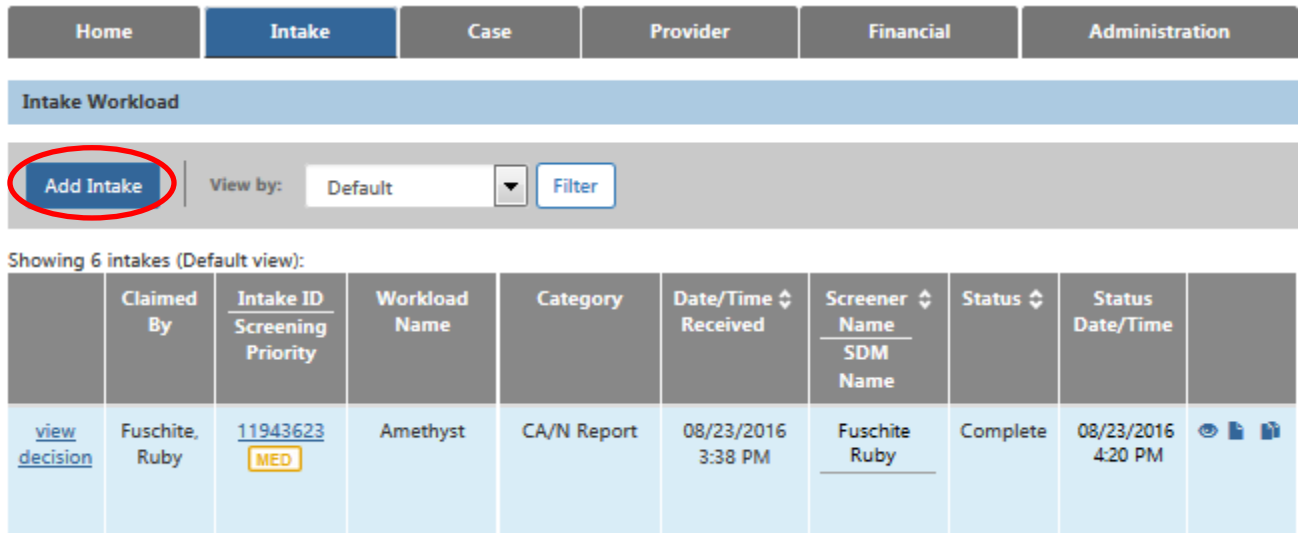
- An **Add Intake** button in the header area
- Additional **Filtering** options, with the system retaining the filter selection until the user changes it
- A dynamic header that displays the number of intakes currently showing in the grid, plus the current grid view (filter)
- A new **Claimed By** column and functionality to help Screeners, and Screening Decision Makers avoid conflicts as users work on intakes
- A new **Screening Priority** column and functionality to help users prioritize their workload, including a **Time Remaining** indicator for in-progress intakes that are approaching the 24-hour deadline for a screening decision
- Display of indicators in the **Category** column
- Ability to **Sort** the list in ascending or descending order by Date/Time Received, Screener Name, and Status
- Preview of Additional **Comments** displayed directly in the Intake Workload grid. If the Additional Comments is larger than the preview, the system will display a **Read more** that will navigate to the full **Additional Comments** narrative
- A new **Narrative** icon to display a pop-up preview of the narrative entered in the intake, with a link to display the full narrative
- **Report** and **Copy** icons added to the right side of the grid, replacing the **Report** and **Copy** hyperlinks currently displayed on the left side of the grid

Intake Redesign – Changes to the Intake Workload Screen




Changes in the Header Area

“Add Intake” Button

An **Add Intake** button will display at the top of the screen as well as at the bottom of the screen. The user will no longer have to scroll to the bottom of the screen to access the **Add Intake** button.



The screenshot shows the 'Intake Workload' header area. At the top, there are navigation tabs: Home, Intake (selected), Case, Provider, Financial, and Administration. Below the tabs, the 'Intake Workload' title is displayed. In the main header area, there is a blue 'Add Intake' button circled in red, followed by a 'View by:' dropdown menu set to 'Default' and a 'Filter' button. Below the header, it says 'Showing 6 intakes (Default view):' and a table of intake records is displayed.

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screener Name SDM Name	Status	Status Date/Time	
view decision	Fuschite, Ruby	11943623 MED	Amethyst	CA/N Report	08/23/2016 3:38 PM	Fuschite Ruby	Complete	08/23/2016 4:20 PM	  

When an authorized user clicks either **Add Intake** button, the system will display a blank **Intake** screen.

Note: With the implementation of Intake Redesign, the blank Intake screen will display the **Reporter** tab first (not the **Basic** tab) to help the screener with the flow of the referral call. However, the screener will be able to select another Intake tab if desired.

Intake Redesign – Changes to the Intake Workload Screen

Filtering the Intake Workload

The header area will display a **View By** field (formerly named “Status”) and **Filter** button that will enable the user to filter the intake workload by a specific Status value. The **View By** field defaults to the **Default** view option.

The screenshot shows the 'Intake Workload' header with navigation tabs: Home, Intake, Case, Provider, Financial, and Administration. Below the tabs is the 'Intake Workload' section. A red box highlights the 'View by:' dropdown menu, which is currently set to 'Default', and a 'Filter' button next to it. To the left of the dropdown is an 'Add Intake' button. Below the dropdown, it says 'Showing 6 intakes (Default view):'. A table below shows the first intake record:

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screeener Name SDM Name	Status	Status Date/Time	
view decision	Fuschite, Ruby	11943623 MED	Amethyst	CA/N Report	08/23/2016 3:38 PM	Fuschite Ruby	Complete	08/23/2016 4:20 PM	

The user’s selection in the **View By** field will not change during the current session – the selected value will remain in the field, and the intake(s) for the selection will display until the user selects a different value and clicks the filter button, or is logged out of the session. The field will not automatically change back to the default value during the current session, even if the user navigates back and forth between intakes and the **Intake Workload** screen.

The filtering options available in the **View By** field are listed below.

For a Screener	For a Screening Decision Maker (SDM)
<ul style="list-style-type: none"> • Default • Returned • Pending • Research • Completed • All 	<ul style="list-style-type: none"> • Default • Pending • Research • Screened In • Screened In AR • Screened Out • I &/or R • Returned • Completed • Time Remaining • All

Intake Redesign – Changes to the Intake Workload Screen

Note:

- **Time Remaining** filter option – Will only display the intakes that do not yet have a Screening Decision saved AND are less than 2 hours from reaching the 24-hour deadline for making a Screening Decision. The intakes will be sorted in ascending order by **Date/Time Received**.

Dynamic Header Information

Directly above the Intake Workload grid, a dynamic header will display the number of intakes showing in the grid. The header will also display the filter value that is currently selected in the **View By** field

Home	Intake	Case	Provider	Financial	Administration				
Intake Workload									
Add Intake View by: <input type="text" value="Default"/> Filter									
Showing 6 intakes (Default view):									
	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screeener Name SDM Name	Status	Status Date/Time	
view decision	Fuschite, Ruby	11943623 MED	Amethyst	CA/N Report	08/23/2016 3:38 PM	Fuschite Ruby	Complete	08/23/2016 4:20 PM	

Intake Redesign – Changes to the Intake Workload Screen

Changes in the Intake Workload Grid

New “Claimed By” Column

The Intake Workload grid will contain a **Claimed By** column displaying the name of the Screener or SDM that the intake currently “belongs to”, if the person logged in to the system is not the person who created the intake. For the intakes created by the Screener who is logged in to the system, the **Claimed By** field will be blank. This column and the functionality is intended to help prevent a user from accessing an intake that another user is working on.

The system will display a name in the **Claimed By** column when another user (i.e., not the logged-in user) has “claimed” the intake (shown in green below).

The screenshot shows the Ohio SACWIS Intake Workload screen. The user is logged in as 'Valley Wood, Eden / Development'. The 'Intake Workload' section shows a table of intakes. The 'Claimed By' column is highlighted with a red box, and the names 'Fuschite, Ruby' and 'Sapphire, Star' are circled in green. The table shows the following data:

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screener Name SDM Name	Status	Status Date/Time	
view decision	Fuschite, Ruby	11943623 MED	Amethyst	CA/N Report	08/23/2016 3:38 PM	Fuschite Ruby	Complete	08/23/2016 4:20 PM	
view edit	Sapphire, Star	11943619	Ore	Family in Need of Services	08/20/2016 1:00 AM	Sapphire Star	Pending	08/20/2016 3:48 PM	
view edit		11943640 HIGH	Agate	CA/N Report SPECIALIZED	08/18/2016 5:00 PM	Valley Wood Eden	Pending	08/18/2016 6:10 PM	

Intake Redesign – Changes to the Intake Workload Screen

How intakes are claimed:

- When a Screener creates an intake, the system considers that Screener to have claimed the intake.
- When an SDM clicks the **Decision** link on the Intake Workload screen to access an intake, the system considers that SDM to have claimed the intake.

Note: An SDM with Screener security will also be able to claim an intake by clicking the **Edit** link for that intake on the Intake Workload screen.

Note: For an SDM, once an intake is Completed and saved OR a screening decision has been saved, the intake is considered “released” and is not claimed by any user. Therefore the **Claimed By** column will be blank for that intake.

Claim Functionality – Screener

The following process describes how the **Claimed By** functionality will work for a **Screener**:

1. Screener A, creates an intake.
2. The system considers Screener A to have claimed the intake. When Screener A is logged in to the system, the **Claimed By** column will be blank.

The screenshot shows the Ohio SACWIS interface. At the top, the user is logged in as 'Valley Wood, Eden Development?' and is on the 'Intake' tab. The 'Intake Workload' section shows a table with 6 intakes. The first intake is highlighted, and its 'Claimed By' field is empty, circled in green. The table columns are: Claimed By, Intake ID Screening Priority, Workload Name, Category, Date/Time Received, Screener Name SDM Name, Status, and Status Date/Time.

Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screener Name SDM Name	Status	Status Date/Time
	11943640 HIGH	Agate	CA/N Report SPECIALIZED	08/18/2016 5:00 PM	Valley Wood Eden	Pending	08/18/2016 6:10 PM

Intake Redesign – Changes to the Intake Workload Screen

- Any other Screener's Intake Workload will display Screener A's name in the **Claimed By** column of that intake. (Screener A's **Claimed By** column will be blank for that intake).

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Intake Workload

Add Intake View by: Default Filter

Showing 6 intakes (Default view):

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screener Name SDM Name	Status	Status Date/Time	
view edit	Valley Wood Eden	11943640 HIGH	Agate	CA/N Report SPECIALIZED	08/18/2016 5:00 PM	Valley Wood Eden	Pending	08/18/2016 6:10 PM	

Screener B clicks the intake's **Edit** link on the Intake Workload screen.

- The system displays a message stating that Screener A appears to be processing the intake, and asks if the user wishes to edit this intake:

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Intake Workload

Add Intake View by: Default Filter

Showing 7 intakes (Pending view):

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screener Name SDM Name	Status	Status Date/Time	
view edit	Valley Wood, Eden	11943640 HIGH	Agate	CA/N Report SPECIALIZED	08/18/2016 5:00 PM	Valley Wood Eden	Pending		

It appears that this intake is being processed by Wood, Eden Valley

To avoid losing important information, we recommended that you contact the current worker prior to continuing to claim.
Do you wish edit this intake?

No, I'll view the intake as 'read-only' Yes, I want to edit this intake

Intake Redesign – Changes to the Intake Workload Screen

5. Screener B has three options when this message appears:
 - a. Proceed to the intake in **View** mode – Click the (left) button labeled **No, I'll view the intake as 'read-only'**.
OR
 - b. Proceed to the intake in **Edit** mode and “claim” the intake (for example, if Screener A has left for the day and asked Screener B to finish the intake) – Click the (right) button labeled **Yes, I want to edit this intake**.
OR
 - c. Close the message window without proceeding to the intake – Click the **Close** (X) button in the upper right of the message window.

6. If Screener B followed Step 5b above to **Edit** the intake: SACWIS will display the intake in **Edit** mode and will consider Screener B to have claimed the intake.

When any other Screener accesses (or refreshes) their Intake Workload screen, they will see Screener B's name in the **Claimed By** column for that intake.

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Intake Workload

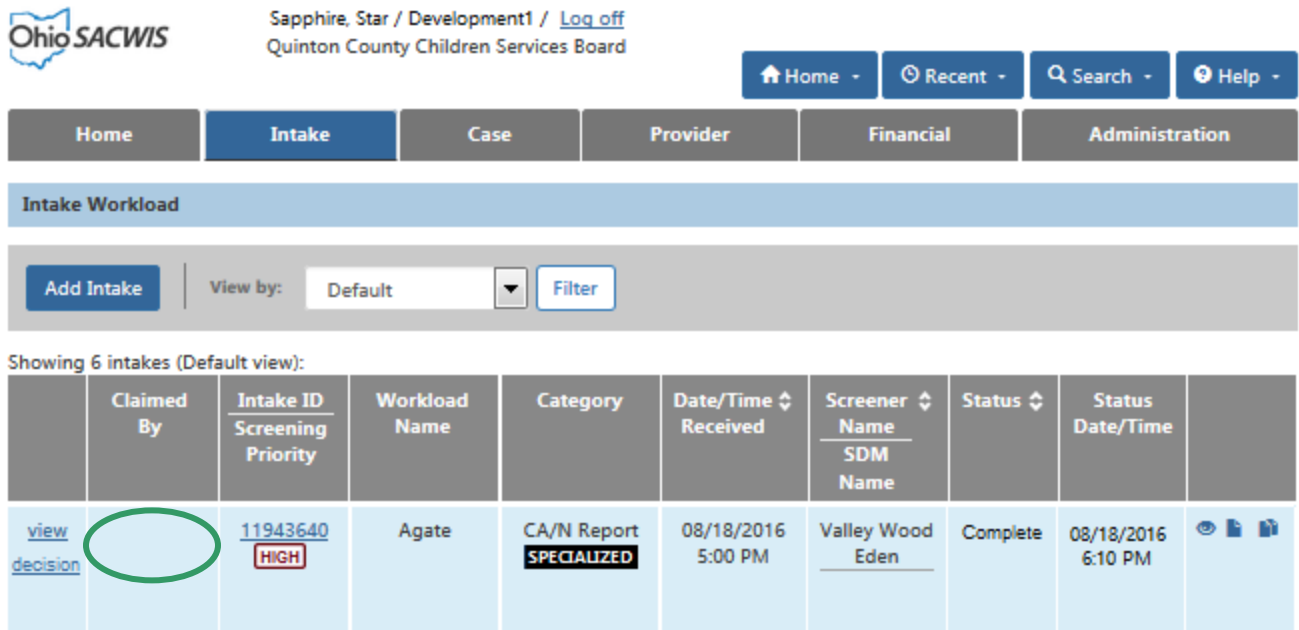
Add Intake View by: Pending Filter

Showing 7 intakes (Pending view):

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screener Name SDM Name	Status	Status Date/Time	
view edit	Sapphire, Star	11943619	Ore	Family in Need of Services	08/20/2016 1:00 AM	Sapphire Star	Pending	08/20/2016 3:48 PM	
view edit	Sapphire, Star	11943640 HIGH	Agate	CA/N Report SPECIALIZED	08/18/2016 5:00 PM	Valley Wood Eden	Pending	08/18/2016 6:10 PM	

Intake Redesign – Changes to the Intake Workload Screen

7. At this point:
 - a. If Screener B works on the intake and saves it but does not mark it as Complete, the system will continue to show Screener B as the claiming user for the intake.
 - b. If Screener B Completes and saves the intake, the system will “release” the intake and the **Claimed By** column will be blank.



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Intake Workload

Add Intake View by: Default Filter

Showing 6 intakes (Default view):

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screener Name SDM Name	Status	Status Date/Time	
view decision		11943640 HIGH	Agate	CA/N Report SPECIALIZED	08/18/2016 5:00 PM	Valley Wood Eden	Complete	08/18/2016 6:10 PM	  

Intake Redesign – Changes to the Intake Workload Screen

Claim Functionality – SDM

The following process describes how the **Claimed By** functionality will work for a **Screening Decision Maker**:

1. SDM #1 “claims” the intake by clicking the **Decision** link on the Intake Workload screen to access the intake.

The screenshot shows the Ohio SACWIS interface. At the top, there is a navigation bar with 'Home', 'Recent', 'Search', and 'Help' buttons. Below this is a secondary navigation bar with 'Home', 'Intake', 'Case', 'Provider', 'Financial', and 'Administration' tabs. The 'Intake' tab is selected. The main content area is titled 'Intake Workload' and includes an 'Add Intake' button, a 'View by:' dropdown set to 'Default', and a 'Filter' button. Below this, it says 'Showing 9 intakes (Default view):'. A table displays the following data:

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screeener Name SDM Name	Status	Status Date/Time	
view decision		11943623 HIGH	Amethyst	CA/N Report EMERGENCY	08/23/2016 3:38 PM	Fuschite Ruby	Complete	08/23/2016 4:20 PM	

2. Since the intake has been claimed by an SDM, the Intake Workload (SDM view) will display a **Release** link in the **Claimed By** column of that intake.

This screenshot is identical to the one above, but the 'release' link in the 'Claimed By' column of the first row is circled in green.

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screeener Name SDM Name	Status	Status Date/Time	
view decision	release	11943623 HIGH	Amethyst	CA/N Report EMERGENCY	08/23/2016 3:38 PM	Fuschite Ruby	Complete	08/23/2016 4:20 PM	

Intake Redesign – Changes to the Intake Workload Screen

- SDM #2 clicks the **Decision** link on the intake that has already been claimed by SDM #1.
- The system displays a message warning SDM #2 that the intake has been claimed by SDM #1:

The screenshot shows the Ohio SACWIS Intake Workload screen. A warning message is displayed in the center, stating: "It appears that this intake is being processed by Sapphire, Star". Below the message, it says: "To avoid losing important information, we recommended that you contact the current worker prior to continuing to claim. Do you wish edit this intake?". There are two buttons: "No, I'll view the intake as 'read-only'" and "Yes, I want to edit this intake".

Below the message, the screen shows a table of intakes. The first row is highlighted, and the "view decision" link is circled in red.

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screeener Name SDM Name	Status	Status Date/Time	
view decision	Sapphire, Star	11943623 HIGH	Amethyst	CA/N Report EMERGENCY	08/23/2016 3:38 PM	Fuschite Ruby	Complete remarks	08/23/2016 4:20 PM	

- SDM #2 has three options when this message appears:
 - Proceed to the intake in **View** mode – Click the (left) button labeled **No, I'll view the intake as 'read-only'**.
OR
 - Proceed to the intake in **Edit** mode and “claim” the intake – Click the (right) button labeled **Yes, I want to edit this intake**.
OR
 - Close the message window without proceeding to the intake – Click the **Close** (X) button in the upper right of the message window.

Intake Redesign – Changes to the Intake Workload Screen

- If SDM #2 followed Step 5b above to **Edit** the intake: SACWIS will display the **Decision** tab of the intake in **Edit** mode (and the other Intake tabs in View Only mode), and will consider SDM #2 to have claimed the intake.

When any other SDM accesses (or refreshes) their Intake Workload screen, they will see SDM #2's name in the **Claimed By** column for that intake.

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Intake Workload

Add Intake View by: Default Filter

Showing 9 intakes (Default view):

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screeener Name SDM Name	Status	Status Date/Time	
view edit link	Valley Wood Eden	1943623 HIGH	Amethyst	CA/N Report EMERGENCY	08/23/2016 3:38 PM	Fuschite Ruby	Complete	08/23/2016 5:00 PM	eye print share

Intake Redesign – Changes to the Intake Workload Screen

7. At this point:

- a. If SDM #2 decides not to make the decision on this intake: He/she can return to the Intake Workload screen and click the **Release** link for the intake. The intake will no longer be claimed by any user and will be available to all SDMs. The **Claimed By** column will be blank.

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Intake Workload

Add Intake View by: Default Filter

Showing 7 intakes (Default view):

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screeener Name SDM Name	Status	Status Date/Time	
view edit link	release	11943623 HIGH	Amethyst	CA/N Report EMERGENCY	08/23/2016 3:38 PM	Fuschite Ruby	Complete	08/23/2016 5:00 PM	eye print share

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Intake Workload

Add Intake View by: Default Filter

Showing 7 intakes (Default view):

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screeener Name SDM Name	Status	Status Date/Time	
view edit link		11943623 HIGH	Amethyst	CA/N Report EMERGENCY	08/23/2016 3:38 PM	Fuschite Ruby	Complete	08/23/2016 5:00 PM	eye print share

Intake Redesign – Changes to the Intake Workload Screen

- b. If SDM #2 makes a Screening Decision and saves the intake: The system will “release” the intake and the **Claimed By** column will be blank. And SDM #2’s name will display in the Screener Name/SDM Name Column.

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Intake Workload

Add Intake View by: Default Filter

Showing 7 intakes (Default view):

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screener Name SDM Name	Status	Status Date/Time	
view edit link		11943623	Amethyst	CA/N Report EMERGENCY County Priority 1	08/23/2016 3:38 PM	Fuschite Ruby Valley Wood Eden	Screened In	08/23/2016 5:00 PM	

- c. If SDM #2 **Returns** the intake to the Screener: The system will display the intake in the Screeners’ view of the Intake Workload, and will consider the intake to be Claimed By the Screener who created the intake.

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Home Recent Search Help

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Intake Workload

Add Intake View by: Completed Filter

Showing 5 intakes (Completed view):

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screener Name SDM Name	Status	Status Date/Time	
view decision		11943623 HIGH	Amethyst	CA/N Report EMERGENCY	08/23/2016 3:38 PM	Fuschite Ruby Completed remarks		08/23/2016 5:00 PM	

Intake Redesign – Changes to the Intake Workload Screen

- d. All other Screeners' Intake Workload grids will display the creating Screener's name in the **Claimed By** column for that intake.

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Intake Workload

Add Intake View by: Completed Filter

Showing 5 intakes (Completed view):

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screener Name SDM Name	Status	Status Date/Time	
view edit	Fuschite Ruby	1943623 HIGH	Amethyst	CA/N Report EMERGENCY	08/23/2016 3:38 PM	Fuschite Ruby	Complete remarks	08/23/2016 5:00 PM	eye print share

Intake Redesign – Changes to the Intake Workload Screen

New “Screening Priority” Column

The **Intake ID** column will be combined with a **Screening Priority** column. The Screening Priority column will display a **Screening Priority Indicator** if:

- The Screener made a selection in the optional **Screening Priority** field within the intake,
- AND
- A Screening Decision has not yet been saved for the intake.

The indicators are Low, Medium, and High:



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Home	Intake	Case	Provider	Financial	Administration
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Intake Workload

[Add Intake](#) | View by: [Filter](#)

Showing 9 intakes (Default view):

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screener Name SDM Name	Status	Status Date/Time	
view edit link	Valley Wood Eden	<u>11943623</u> HIGH	Amethyst	CA/N Report EMERGENCY	08/23/2016 3:38 PM	Fuschite Ruby	Screened In	08/23/2016 3:38 PM	eye print share
view edit	release	<u>11943616</u> MCD	Garnet	Family in Need of Services	08/01/2016 9:00 AM	Valley Wood Eden	Pending	08/01/2016 9:00 AM	eye print share
view edit		<u>11998877</u> LOW	Pebble	Dependency Report	07/15/2016 11:37 AM	Sapphire Star	Pending	07/15/2016 11:37 AM	eye print share

Intake Redesign – Changes to the Intake Workload Screen

Note:










- When an intake is **less than 2 hours** from reaching the 24-hour deadline for making a Screening Decision AND no decision has been recorded, the **Screening Priority** indicator will be escalated to **High** regardless of the priority selected within the intake. (The screening priority selected within the intake will not be changed.)
- When a screening decision has been saved for the intake, this indicator will no longer display in the Intake Workload grid.

Intake Redesign – Changes to the Intake Workload Screen

Time Remaining Indicator

When an intake is **less than 2 hours** from reaching the 24-hour deadline for making a Screening Decision AND no decision has been completed, the **Screening Priority** column will also display a **Time Remaining** indicator.

- The **Time Remaining** indicator will display the Hours and Minutes remaining in black, bold text until the intake has reached 24 hours from the **Date/Time Received**. Example: **1:56 remaining**
- When the intake has reached 24 hours from the **Date/Time Received** and no decision has been completed, the **Time Remaining** indicator will display **0:00 remaining** in red, bold text.

Intake Workload									
Add Intake		View by: Completed		Filter					
Showing 6 intakes (Completed view):									
	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screeener Name SDM Name	Status	Status Date/Time	
view decision	Valley Wood, Eden	11943619 HIGH 01:02 remaining	Ore	Family in Need of Services	08/20/2016 1:02 AM	Sapphire Star	Complete	08/21/2016 12:00 AM	  
view decision	release	11943640 HIGH 00:00 remaining	Agate	CA/N Report EMERGENCY	08/18/2016 5:00 PM	Valley Wood Eden	Complete	08/25/2016 12:41 PM	  
view decision	Valley Wood, Eden	11943620 HIGH 00:00 remaining	Stone	CA/N Report SPECIALIZED	08/08/2016 12:20 PM	Rock Dolomite	Complete	08/31/2016 4:23 PM	  

Note:

- Upon accessing the **Intake Workload** screen, the system will calculate the **Time Remaining** by comparing the system date to the **Date/Time Received** for the intake.
 - The system will re-calculate the **Time Remaining** when the user **Refreshes** the Intake Workload screen.
- When a screening decision has been saved for the intake, this indicator will no longer display in the Intake Workload grid.

Intake Redesign – Changes to the Intake Workload Screen

“Category” Column

The **Category** column will display the Category as well as the following indicators (if applicable) for the intake:

- **Emergency** – Will display if the intake has an answer of **Yes** for the question **Is this an emergency?** on the Intake **Decision** tab.
- **Specialized** – Will display if the intake has an answer of **Yes** for the question **Does this report require a Specialized Assessment/Investigation?** on the Intake **Basic** tab.
- **County Priority** – Will display if the County uses a priority level indicator on the decision.

Intake Workload									
Add Intake View by: Completed <input type="button" value="Filter"/>									
Showing 6 intakes (Completed view):									
	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screeener Name SDM Name	Status	Status Date/Time	
view decision	Valley Wood, Eden	11943619 HIGH 01:02 remaining	Ore	Family in Need of Services	08/20/2016 1:02 AM	Sapphire Star	Complete	08/21/2016 12:00 AM	
view decision	release	11943640 HIGH 00:00 remaining	Agate	CA/N Report EMERGENCY	08/18/2016 5:00 PM	Valley Wood Eden	Complete	08/25/2016 12:41 PM	
view decision	Valley Wood, Eden	11943620 HIGH 00:00 remaining	Stone	CA/N Report SPECIALIZED	08/08/2016 12:20 PM	Rock Dolomite	Complete	08/31/2016 4:23 PM	

Intake Redesign – Changes to the Intake Workload Screen

Sorting on Columns

The user will be able to click arrows in the following column headers to sort the Intake Workload in **Ascending** (▲) or **Descending** (▼) order by that column:

- **Date/Time Received**
- **Screener Name**
- **Status**



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Home | **Intake** | Case | Provider | Financial | Administration

Intake Workload

[Add Intake](#) | View by:

Showing 9 intakes (Default view):







	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screener Name SDM Name	Status	Status Date/Time	
view edit link	Valley Wood Eden	11943623 HIGH	Amethyst	CA/N Report EMERGENCY	08/23/2016 3:38 PM	Fuschite Ruby	Screened In	08/23/2016 3:38 PM	
view edit	release	11943616 MCD	Garnet	Family in Need of Services	08/01/2016 9:00 AM	Valley Wood Eden	Pending	08/01/2016 9:00 AM	
view edit		11998877 LOW	Pebble	Dependency Report	07/15/2016 11:37 AM	Sapphire Star	Pending	07/15/2016 11:37 AM	

Intake Redesign – Changes to the Intake Workload Screen

Comments Display

If the user has entered narrative in the Additional Comments text box of the Intake screen, the Intake Workload grid will display a preview of those Additional Comments. The preview will be labeled Comments and will display a portion of the text.

If the Comments are longer than the preview display, the user can click a Read more link that will display the full narrative (shown in red below).

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screener Name SDM Name	Status	Status Date/Time	
view edit		10033575 LOW	Vernita Case	Information and/or Referral	11/04/2015 2:43 PM	Wallace, Mia	Pending	11/04/2015 3:17 PM	  
			<div style="border: 2px solid red; padding: 5px;"> Comments: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus e montes, nascetur ridiculus felis... Read more </div>						
view edit	Driver, Elle	10035576 MED	Caller followup with the Hanzo case	Information and/or Referral	11/04/2015 12:34 PM	Driver, Elle	Pending	11/04/2015 12:49 PM	  
		[R] 10035575 HIGH							
			<div style="border: 2px solid blue; padding: 5px;"> Comments have been restricted from view. </div>						

Note: If the intake is Restricted and the user does not have access to that intake, then the Intake Workload grid will not display any Additional Comments. The grid will display the statement Comments have been restricted from view (shown in blue above).

Intake Redesign – Changes to the Intake Workload Screen

Hyperlinks and Icons

The **Intake Workload** screen will contain the following changes related to hyperlinks and icons:

- A new **Narrative** icon (👁️) will display on the right side of the grid. Clicking the **Narrative** icon will display a Narrative snapshot window displaying the first 400 characters of the Narrative entered in the intake.
 - To view the entire narrative, the user can click a **View full narrative** link at the bottom of the pop-up window to launch the Intake screen.














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Quinton County Children Services Board




Home	Intake	Case	Provider	Financial	Administration				
Intake Workload									
Add Intake View by: <input type="text" value="Default"/> Filter									
Showing 9 intakes (Default view):									
	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screeener Name SDM Name	Status	Status Date/Time	
view edit link	Valley Wood Eden	11943623 HIGH	Amethyst	CA/N Report	08/23/2016	Fuschite	Screened	08/23/2016	👁️ 📄 📄
view edit	release	11943616 MCD	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede justo, fringilla vel, aliquet nec, vulputate eget, arcu. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo l						
view edit		11998877 LOW							
									View full narrative

- If the intake is **Restricted** and the user does not have access to that intake, then the Intake Workload grid will not display any comments. When clicking the **Narrative** icon, the grid will display the statement, **Comments have been restricted from view**.

Intake Redesign – Changes to the Intake Workload Screen

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screeener Name SDM Name	Status	Status Date/Time	
view edit link	Valley Wood Eden	11943623 HIGH	Amethyst	CA/N Report EMERGENCY	08/23/2016 3:38 PM	Fuschite Ruby	Screened In	08/23/2016 3:38 PM	  
view edit	release	11943616 MCO	Garnet	Family in Need of Services	08/01/2016 9:00 AM	Valley	Pending	08/01/2016	  
Comments have been restricted.									
view edit		11998877 LOW	Pebble	Dependency Report	07/15/2016 11:37 AM	Sapphire Star	Pending	07/15/2016 11:37 AM	  

- A new **Report** icon () will display on the right side of the grid. The system will display the history of the JFS 01441, if it exists, or the user can generate a new report.
- A new **Copy** icon () will display on the right side of the grid. All Reporters and their original Contact Date/Time and the intake's Received Date/Time will be copied into a new intake. The following items will not be copied into the new intake:
 - Decision tab
 - Intake status will be set to Pending
 - Workload Name
 - Human Trafficking information
 - Fatality/Near Fatality information

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screeener Name SDM Name	Status	Status Date/Time	
view edit link	Valley Wood Eden	11943623 HIGH	Amethyst	CA/N Report EMERGENCY	08/23/2016 3:38 PM	Fuschite Ruby	Screened In	08/23/2016 3:38 PM	  

If you need additional information or assistance, please contact the SACWIS Help Desk.