Navigating Intake Workload
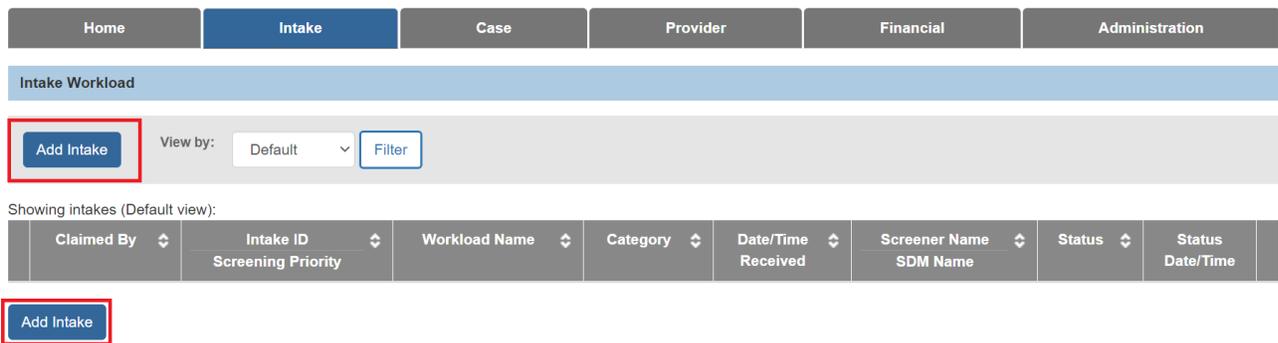
Knowledge Base Article

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Overview

This article describes the functionality of the **Intake Workload** screen.

"Add Intake" Button

An **Add Intake** button displays at the top of the screen as well as at the bottom of the screen. This is to prevent any unnecessary scrolling when adding new intakes.

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

Filtering the Intake Workload

The header area displays a **View By** field 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.

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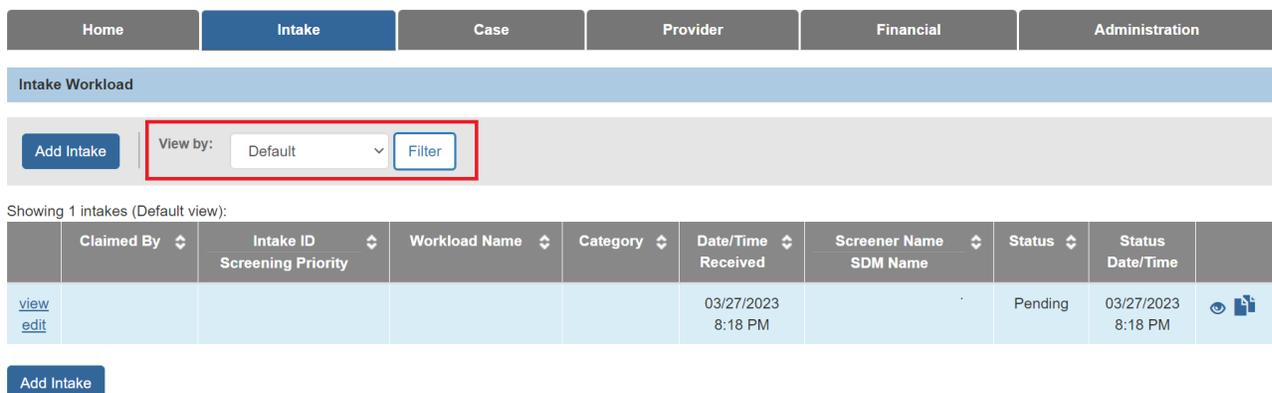
Intake Workload

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)	
• Default	• Default	• I &/or R
• Returned	• Pending	• Returned
• Pending	• Research	• Completed
• Research	• Screened In	• Time Remaining
• Completed	• Screened In AR	• All
• All	• Screened Out	

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

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Intake Workload

	Home	Intake	Case	Provider	Financial	Administration

Intake Workload

Add Intake | View by: Pending ▾ | Filter

Showing 12 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					03/28/2023 9:09 AM		Pending	03/28/2023 9:09 AM	👁 📄
view edit		HIGH 00:00 remaining			12/07/2022 4:04 PM		Pending	12/07/2022 4:04 PM	👁 📄
view edit		HIGH 00:00 remaining		CA/N Report SPECIALIZED	11/01/2022 10:07 AM		Pending	11/01/2022 10:07 AM	👁 📄 📄

"Claimed By" Column

The Intake Workload grid contains 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).

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: A 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 a 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.

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Intake Workload

3. 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).

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

4. 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:

It appears that this intake is being processed by   ✕

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

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

5. Screener B has three options when this message appears:

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    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.

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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Claim Functionality – Screening Decision Maker (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.
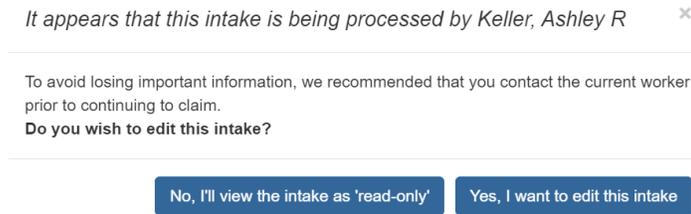

2. Since the intake has been claimed by a SDM, the Intake Workload (SDM view) will display a **Release** link in the **Claimed By** column of that intake.

3. SDM #2 clicks the **Decision** link on the intake that has already been claimed by SDM #1.

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4. The system displays a message warning SDM #2 that the intake has been claimed by SDM #1:

> *It appears that this intake is being processed by Keller, Ashley R* ✕
>
> To avoid losing important information, we recommended that you contact the current worker prior to continuing to claim.
> **Do you wish to edit this intake?**
>
> [No, I'll view the intake as 'read-only']   [Yes, I want to edit this intake]

5. SDM #2 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 – 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 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.

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.

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.

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.

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

"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:

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.

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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.

	Home	Intake	Case	Provider	Financial	Administration

Intake Workload

Add Intake	View by:	Pending ▾	Filter

Showing 12 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					03/28/2023 9:09 AM		Pending	03/28/2023 9:09 AM	👁 📑
view edit		HIGH **00:00 remaining**			12/07/2022 4:04 PM		Pending	12/07/2022 4:04 PM	👁 📑
view edit		HIGH **00:00 remaining**		CA/N Report SPECIALIZED	11/01/2022 10:07 AM		Pending	11/01/2022 10:07 AM	👁 📄 📑

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.

"Category" Column

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

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- **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.

	Home	Intake	Case	Provider	Financial	Administration

Intake Workload

Add Intake	View by:	Pending ⌄	Filter

Showing 12 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					03/28/2023 9:09 AM		Pending	03/28/2023 9:09 AM	👁 📄
view edit		HIGH 00:00 remaining			12/07/2022 4:04 PM		Pending	12/07/2022 4:04 PM	👁 📄
view edit		HIGH 00:00 remaining		CA/N Report SPECIALIZED	11/01/2022 10:07 AM		Pending	11/01/2022 10:07 AM	👁 📄 📄

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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Intake Workload

Add Intake	View by:	Pending ▾	Filter

Showing 12 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					03/28/2023 9:09 AM		Pending	03/28/2023 9:09 AM	👁 📑
view edit		HIGH 00:00 remaining			12/07/2022 4:04 PM		Pending	12/07/2022 4:04 PM	👁 📑
view edit		HIGH 00:00 remaining		CA/N Report SPECIALIZED	11/01/2022 10:07 AM		Pending	11/01/2022 10:07 AM	👁 📄 📑

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).

	Home	Intake	Case	Provider	Financial	Administration

Intake Workload

Add Intake	View by:	All ▾	Filter

Showing 11 intakes (All view):

	Claimed By ▲	Intake ID Screening Priority ⇕	Workload Name ⇕	Category ⇕	Date/Time Received ⇕	Screener Name SDM Name ⇕	Status ⇕	Status Date/Time	
view edit		HIGH 00:00 remaining			07/15/2022 2:46 PM		Pending	07/15/2022 2:46 PM	👁 📑
view edit		HIGH 00:00 remaining		Dependency Report	02/01/2022 8:53 AM		Pending	05/31/2022 11:29 AM	👁 📄 📑

Comments: Caretaker is threatening to hurt or kill the children if they return to her home today. No one has custody. Spoke to A. Goodlive about this high referral. SDM Toni will screen

Hyperlinks and Icons

The **Intake Workload** screen contains the following hyperlinks and icons:

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- A **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.

- A **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 **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

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Intake Workload

	Home	Intake	Case	Provider	Financial	Administration

Intake Workload

[Add Intake] View by: [All ▾] [Filter]

Showing 11 intakes (All view):

Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screener Name SDM Name	Status	Status Date/Time		
view edit	HIGH 00:00 remaining			12/07/2022 4:04 PM		Pending	12/07/2022 4:04 PM	👁 📄	
view edit	HIGH 00:00 remaining		CA/N Report SPECIALIZED	11/01/2022 10:07 AM		Pending	11/01/2022 10:07 AM	👁 📄 📄	

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at SACWIS_HELP_DESK@jfs.ohio.gov .

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