Navigating Intake Workload



Knowledge Base Article

Table of Contents

Overview	3
"Add Intake" Button	3
Filtering the Intake Workload	3
Dynamic Header Information	4
"Claimed By" Column	5
Claim Functionality – Screener	5
Claim Functionality – Screening Decision Maker (SDM)	8
Time Remaining Indicator	12
"Category" Column	12
Sorting on Columns	13
Comments Display	14
Hyperlinks and Icons	14



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.

Home	Intake	Case	Provide	er	Financial	Adminis	tration
Intake Workload							
Add Intake View		er					
Showing intakes (Default vie Claimed By	w): Intake ID 🛟 Screening Priority	Workload Name 🛭 💠	Category 🛟	Date/Time ✿ Received	Screener Name (SDM Name	≎ Status ≎	Status Date/Time
Add Intake							

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.

	Home	Intake	Case	Pr	rovider	Financial		Administratior	ı
Intake	Workload								
	I Intake	Delaut	Filter						
Showing	g 1 intakes (Default v Claimed By ≎	iew): Intake ID 💠 Screening Priority	Workload Name 💠	Category 🛟	Date/Time ✿ Received	Screener Name 🛟	Status 💲	Status Date/Time	
<u>view</u> <u>edit</u>					03/27/2023 8:18 PM		Pending	03/27/2023 8:18 PM	•
Add In	ntake								



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	on Maker (SDM)
Default	Default	● I &/or R
Returned	Pending	Returned
Pending	Research	Completed
Research	Screened In	• Time
Completed	 Screened In AR 	Remaining
• All	Screened Out	• All

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	Inta	ke	Case		Provider	Financial		Administra	ation
Intak	e Workload									
Add	d Intake	View by: Pending	g ~ Filter]						
Showin	g 12 intakes (Pe							_		
	Claimed ✿ By	Intake ID Screening Priority	Workload Name 💲	Category		Date/Time 💠 Received	Screener Name 💠 SDM Name	Status ≎	Status Date/Time	
<u>view</u> <u>edit</u>						03/28/2023 9:09 AM		Pending	03/28/2023 9:09 AM	•
<u>view</u> edit		HIGH 00:00 remaining				12/07/2022 4:04 PM		Pending	12/07/2022 4:04 PM	•
<u>view</u> <u>edit</u>		HIGH 00:00 remaining		CA/N Repor	_	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.



Intaka Wo	ritinad													
Ast He	New by:	AL	Filler											
Showing 12	Claimed By 0	titule ID 0 Screening Priority	Workload Name	•	Calegory	•	Date/Time Received	•	Screener Rame SOM Name	•	Data	•	Status Data/Time	
-	Doe, John						10/12/2022 10:24 AM				Pending		10/12/2022 10:24 AM	• 8 ³
all sites all		1824			CAN Report		10/12/0022 10/18 AM				Pending		10/12/2022 10:18:AM	• B B)

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).

	Home	Inta	ke	Case	- 3	Provider	Financial		Administr	ation
Intake	Workload									
Add	i Intake	New by: Pending	Filter							
howing	12 intakes (Per	nding view):								
	Claimed ‡ By	Intake ID 🗘 Screening Priority	Workload Name 💠	Category		Date/Time \$ Received	Screener Name 🗘 SDM Name	Status 🗘	Status Date/Time	
iew edit						03/28/2023 9:09 AM		Pending	03/28/2023 9:09 AM	• 🗗
i tre Edit	Doe, John	HIGH 00:00 remaining				12/07/2022 4:04 PM		Pending	12/07/2022 4:04 PM	•
iew Ebe	Doe, Jane	HIGH 00:00 remaining		CA/N Report SPECIALIZED		11/01/2022 10:07 AM		Pending	11/01/2022 10:07 AM	• • •

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 the	at this intake is being processed	by i 🗙
prior to continuin	nportant information, we recommended th g to claim. edit this intake?	at you contact the current worker
	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:



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.

	Home	Inta	ike 1	Case	3	Provider	Financial		Administr	ation
Intake	Workload									
Add	Intake	New by: Pending	- Filter							
owing	12 intakes (Per	nding view):								
	Claimed ‡ By	Intake ID 💲 Screening Priority	Workload Name 💲	Category		Date/Time C Received	Screener Name 💲 SDM Name	Status 🗘	Status Date/Time	
ew dit						03/28/2023 9:09 AM		Pending	03/28/2023 9:09 AM	• 🕅
de (Doe, John	HIGH 00:00 remaining				12/07/2022 4:04 PM		Pending	12/07/2022 4:04 PM	•
ew dit	Doe, Jane	HIGH 00:00 remaining		CA/N Report SPECIALIZED		11/01/2022 10:07 AM		Pending	11/01/2022 10:07 AM	•

- 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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AN HEP	View by:	Al	- Filler											
Country 122	Claiment By 8	Intake ID Screening Priority	Workload Name	•	Cologory	•	Date/Time Received	•	Screener Name SOM Name	•	Data	•	Sinton Data/Time	
100	Dae, John)					10/12/2022 10/24 AM				Pending		10/12/2022 10:24 AM	• \$ ²
all all		1624			CAN Report		10/12/2022 10:18 AM				Pending		10/12/2022 10:18 AM	• B B

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.

ASC 11	take View by:	Default	-	Ref.										
wittig D	intakes (Default view)													
	Claimed By 0	Intain ID Screening Proofly	•	Workload Name	•	Calagory	•	Date:Time 0 Received	Screener Name SDM Name	•	Status 0	Elatur Data/Time		
01 10						GAIN Report		06/29/2011 3:13 PM			Doreened in	08/05/2022 4:14 PM	•	
100	Doe, John					GAN Report		08/16/2022 4:50 AM			Complete	06/16/2022 5.06 AM		Ē

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.

daha W	lockload										
NSC 11	telet Verwiter	Default	Film								
kig 9	Clatred By	triate ID 5	Workload Name	Calagory	Date/Time	Screener Name 5		utur 1	Date	-	ī
		Screening Priority			Received	SOM Name			Data/Time		
				CA/N Report	06/25/2011 3:13 PM		50	eened in	05/03/2022 4:14 PM	•	
DH MADO	11111	1020		CA/N Report	08/16/2022 4:50 AM		0	ompliete	06/16/2022 5.06 AM	•	

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



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 th prior to continuing to claim. Do you wish to edit this intake?	at you contact the current worker
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.

rdake W	kinkload												
A50 11	tine by	Detsuit	- 1	tur									
itig 9	intakes (Default view)	Infails 10		Workland Name	P.41.11	Date/Time	Screener Name		Shee		Dates	-	
	Cistmed By ©	Screening Priority			Callegory	Received	SOM Name		-		Data/Time		
CHT DR					CA/N Report	06/25/2011 3:13 PM		K	Screened	in	08/05/2022 4:14 PM	• 8	
iew deco	Smith, Jahn	International			GA/N Report	08/16/2022 4:50 AM			Complete		06/16/2022 5:08 AM	•	

- 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.

Claimed B	V C Intake C Screenin Priority		Workload N			Category		Date/Time C Received		Screener Name SOM Name	Sint.e			Status InterTime			L
sitew item						CAN Report		06/20/2011 3:13 PM			Screme	t in		6/03/2022 4.14 PM	•	-	
viter Infesse ediske	> (*)*	anang				CAN Report		06/16/2022 4:50 AM			Congle	82		6/16/2022 5/06 AM	•	1	
owing 1 instatus (Defau Channed 1	By D Britake Borwert		Workload	Kens	•	Category	0	Data Time Received	•	Ecreener Na SOM Nerro	• •	ma	•	Biati DeleT			
owing II intakes (Ontia Chained II Viter IIIR	By C Britake		Workload	Name	•	Category CAN Report	•		•			ntus secol i			022	• 6	

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.

	Claimed By \$	Intake KD 0 Screening Priority	Workload Name	•	Callegory	•	Date/Time © Received	Screener Name © SCM Name	Markes 0	Status Date:Time		
viter ItA					CAN Report		06/20/2011 3:13 PM		Screened in	08/03/2022 4:14 PM	•	83
vine edit lok					CAN Report		08-16/2022 4:50 AM	Smith, John	Screened Out	10/12/2022 2:48 PM	•	63

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.

	Claimed By \$	Intake ID 0 Screening Priority	Workload Name 🛛	Category	ConterTime C Received	Screener Name S SCM Name	Natur 0	Statun Date:Time	
viter Itik				CAN Report	06/20/2011 3:13 PM		Screened in	0500/2022 4:14 PM	• B B
vice edit				CA/N Report	08/16/2022 4:50 AM	Doe, John	imata	10/12/2022 2:48 PM	61 fl o

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

wing 9 intakes (Default view)



	Claimed By \$	Intake ID 0 Screening Priority	Workload Name 8	Callegory 8	Date:Time 0 Received	Screener Name S SCM Name	Status ©	Status Date Time	
xiner Ink				CAN Report	08/25/2011 3:13 PM		Screened in	08/03/2022 4:14 PM	• B B)
100	Dawi, Julian			CAN Report	08/16/2022 4.50 AM	Doe, John	Returned	10/12/2022 2:48 PM	• B B)

"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:

Home	Intak	(e	Case	Provider	Financial		Administra	ation
Intake Workload								
Add Intake Vie	w by: Pending	~ Filter						
Showing 12 intakes (Pend	ling view):							
Claimed ≎ By	Intake ID \$ Screening Priority	Workload Name 💲	Category	Date/Time 🛟 Received	Screener Name 💠 SDM Name	Status 🛟	Status Date/Time	
<u>view</u> <u>edit</u>				03/28/2023 9:09 AM		Pending	03/28/2023 9:09 AM	11 🕲
<u>view</u> edit	HIGH 00:00 remaining			12/07/2022 4:04 PM		Pending	12/07/2022 4:04 PM	1
<u>view</u> <u>edit</u>	HIGH 00:00 remaining		CA/N Repor	 11/01/2022 10:07 AM		Pending	11/01/2022 10:07 AM	•

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.



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	Inta	ke	Case	Provider	Financial		Administra	ation
Intake	Workload								
Add	Intake	iew by: Pending	, · Filter]					
Showing	12 intakes (Per	nding view):							
	Claimed ✿ By	Intake ID Screening Priority	Workload Name 💲	Category	\$ Date/Time 💠 Received	Screener Name SDM Name	Status 💠	Status Date/Time	
<u>view</u> <u>edit</u>					03/28/2023 9:09 AM		Pending	03/28/2023 9:09 AM	•
<u>view</u> <u>edit</u>		HIGH 00:00 remaining			12/07/2022 4:04 PM		Pending	12/07/2022 4:04 PM	14 🖉
<u>view</u> <u>edit</u>		HIGH 00:00 remaining		CA/N Report	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:



- 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	Inta	ke	Case		Provider	Financial		Administra	ition
Intak	e Workload									
Ad	d Intake	iew by: Pending	g v Filter							
Showin	g 12 intakes (Per	iding view):								
	Claimed ✿ By	Intake ID Screening Priority	Workload Name 💲	Category		Date/Time 🛟 Received	Screener Name 💠 SDM Name	Status 💲	Status Date/Time	
<u>view</u> <u>edit</u>						03/28/2023 9:09 AM		Pending	03/28/2023 9:09 AM	۵ 📫
<u>view</u> <u>edit</u>		HIGH 00:00 remaining				12/07/2022 4:04 PM		Pending	12/07/2022 4:04 PM	🗳 🕑
<u>view</u> <u>edit</u>		HIGH 00:00 remaining		CA/N Repo	_	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** (\checkmark) or **Descending** (\checkmark) order by that column:

- Date/Time Received
- Screener Name
- Status



	Home	Inta	ke	Case	Provider	Financial		Administr	ation
Intake	Workload								
Add	l Intake	iew by: Pending	, · Filter]					
Showing	g 12 intakes (Per	nding view):							
	Claimed 🗢 By	Intake ID 💠 Screening Priority	Workload Name 💠	Category	Date/Time 💠 Received	Screener Name 💠 SDM Name	Status 💲	Status Date/Time	
<u>view</u> <u>edit</u>					03/28/2023 9:09 AM		Pending	03/28/2023 9:09 AM	۴ ای
<u>view</u> edit		HIGH 00:00 remaining			12/07/2022 4:04 PM		Pending	12/07/2022 4:04 PM	1 🕲
<u>view</u> <u>edit</u>		HIGH 00:00 remaining		CA/N Repo	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	Inta	ke	Case		Provider	Financial		Administra	ation
Intake	Workload									
Add	Intake	iew by: All	∽ Filte	r						
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	
<u>view</u> <u>edit</u>		HIGH 00:00 remaining				07/15/2022 2:46 PM		Pending	07/15/2022 2:46 PM	•
<u>view</u> edit		HIGH 00:00 remaining		Dependency	Report	02/01/2022 8:53 AM	-	Pending	05/31/2022 11:29 AM	•
		oo.oo remaining	Comments: Careta	ker is threatening to his high referral. SDN			turn to her home today.	No one has cus	tody. Spoke to	

Hyperlinks and Icons

The Intake Workload screen contains the following hyperlinks and icons:

Page 14 of 16



- 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.

	I Intake View by: All	×	Filtor							
howing	g 11 intakes (All view): Claimed A Intake ID ¢ By Screening Priority	Workload N	Narme 🗘	Category	٥	Date/Time \$ Received	Screener Name 💲 SDM Name	Status 🗘	Status Date/Time	
rierw edit	(19GH) 00:00 remainin	,				07/15/2022 2:46 PM		Pending	07/15/2022 2:46 PM	• 14
itter fibe	- 00:00 remaining	Comments:	Deceas	ed Father's Add	o Case ress/ l	Phone: Toledo O	closed 1/4/22) Moti hio/ Unknown Child 14-290-2565 Custo	's Address/P	hone:	0
iew edit	00:00 remaining	,	Address	/Phone: 4979 0	Frimm	Dr, Lockbourne	, Ohio 43137 / 614 , Ohio 43137 / 614 e 7th , Brianna atte	290-2565		•
iew idit	- NCH		grade			View full n	arrative			• 1

- 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
 - o Workload Name
 - o Human Trafficking information
 - Fatality/Near Fatality information



	Home Intake		ke	Case		Provider	Financial		Administration	
Intake Workload										
Add Intake View by: All										
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	
<u>view</u> <u>edit</u>		HIGH 00:00 remaining				12/07/2022 4:04 PM		Pending	12/07/2022 4:04 PM	۵ 📫
<u>view</u> <u>edit</u>		HIGH 00:00 remaining		CA/N Rep SPECIALIZ		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 <u>SACWIS HELP DESK@jfs.ohio.gov</u>.

