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# SSIS Software Specification

Intake

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# SECTION ONE: INTRODUCTION

## 1.0 Overview

Intake functionality currently exists in SSIS. It underwent a major redesign and data conversion in Version 3.6 of the SSIS Worker application. At the time of the redesign, adult maltreatment investigation was not part of SSIS.

Intake and child maltreatment modules have significant interdependency which makes them both maintenance-heavy and fragile. The interdependency also makes it difficult to add adult maltreatment investigation functionality into SSIS. These issues include:

- Intake is not fully integrated into the architecture so warning/errors and other behaviors are not in sync with other parts of the application
- Business rule dependencies between objects
- Conflicting business rules--fixing one problem often causes another unanticipated problem
- Repeated Problem Reports about the same topics such as Intake rollback and referring intakes to existing workgroups

## 1.1 Project Objectives

The primary objectives for this design effort are:

- Make the existing functionality more stable and reduce maintenance.
- Prepare for Adult Maltreatment functionality development

To meet these objectives, this design will:

- Create separate specifications for Intake, Child Maltreatment, and Vulnerable Adult/Adult Maltreatment
- Clarify and document business rules for saving and disposing of an Intake
- Remove business rules that no longer apply
- Modify business rules to support current business requirements
- Define clear decision points where business rules are enforced
- Make needed data structure changes--eliminate fields that are no longer needed or leave them on tables as legacy fields.
- Eliminate the automatic creation of the Child Maltreatment report record--require that the user manually create a Child Maltreatment Report record when the Intake is about Child Maltreatment

# 1.2 Impact Statement

**Intake Reports:** Three existing reports are re-specified to use the changed data structure. The behavior, appearance, and results should remain unchanged.

**GUI:** The Intake Entry Screen and Intake Search Log are completely re-written to use the revised tables, standard SSIS architecture and business rule implementation methods (data clean up). The intake screen appears similar but behaves according to architectural standards. The child maltreatment report screens are not part of the intake screen set and are specified separately.

**Training:**

- Training for the intake screen itself should minimal because the fields shown are similar and business rules are implemented with the standard data clean-up behavior. Additionally, the intake workgroup behavior is more consistent with standard workgroup behavior. The design takes advantages of what the users already know about how SSIS functions.
- The design team anticipates that the greater training challenge is in the conceptual changes described in Section 8 of this document (Design concepts).

**Purge logic:** Modification is required to correctly set destruction dates on intake workgroups. This will be handled via separate PR.

**Conversion:** Data structure and code changes are mapped one to one whenever possible. Some intake fields will no longer exist and will not be converted. Workgroup and case folder records must be created as containers for some of the existing intake records. Conversion is detailed in a separate document due to the overlap between intake and child maltreatment.

**Testing:** Testing includes both intake conversion as well as the new Intake and Intake workgroup functionality. While separate specifications and business objects exist for intake and child maltreatment reports, there is some functional overlap that should be considered when planning the testing.

**Research (Children’s Research Planning and Evaluation, Institute of Applied Research, County research/ad-hoc reporting staff):** We need to provide them with design concepts, and schema information to modify their queries as needed.

# SECTION TWO: FUNCTIONAL REQUIREMENTS

## 2.0 Introduction

This Section describes the functional requirements for the Intake software.

## 2.1 Business Process

The purpose of Intake is to classify, evaluate and screen incoming contacts. The process begins when the county becomes aware of a new problem or potential service need. The worker gathers enough information about the reason for the call and the people involved in order to classify it as a report of maltreatment, a request for information, or a request for service. Depending upon the classification and the probability that the intake will require further attention, the worker may need to expand on the preliminary facts with additional person and situation-specific details.

During the intake process, the worker continually evaluates the information to confirm that the classification is correct and to determine the next appropriate step. A completed intake is one that has been classified, has a defined next step, and has sufficient information to justify moving to the next step--either closing the intake with no further action or opening for further assessment or on-going service.

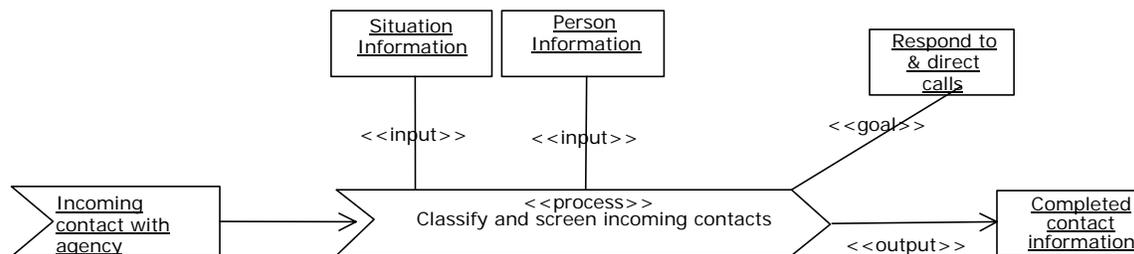


Figure 2-1: Intake Business Process

### Child and Adult Maltreatment Reports

If the intake concerns a report of child or adult maltreatment, the user must create a report and record additional information. Report information is required before the user may close the intake or continue to an assessment or investigation. Specifications for child and adult maltreatment reports are documented separately.

## 2.2 Intake Requirements

Requirement
1. Provide a means to record information about the call/contact. This information includes but is not limited to: <ul style="list-style-type: none"> <li>• Date/time of the intake</li> <li>• Classification of the intake (for example: service request, request for information, report of child or adult maltreatment, etc)</li> <li>• Method (phone, fax, walk in, etc)</li> <li>• Type of problem</li> <li>• Program</li> <li>• Disposition/close date and reason (either reason for no further action or open for further assessment or case management)</li> </ul>
2. Allow the user to record information about the participants as needed/ required by the intake classification's business rules.
3. Allow the user to set security on a specific intake so that it is viewable and editable only by persons with permission to do so.
4. Allow an intake to be assigned to another worker.
5. Allow the user to view a list of a person's current and past intakes.
6. Validate that the user has recorded required information to close the intake or progress to further assessment or case management. Required information is based upon the type of intake.
7. Provide a separate mechanism for creating a child or adult maltreatment report if the intake concerns alleged maltreatment. Although the report contains information not found in a basic intake, the process for creating and recording it must be integrated with screens used for recording the intake.
8. Associate intakes with subsequent assessment or case management workgroups.

Future consideration: The system may someday be required to accept an intake from an external system. While not an immediate requirement, at some point, SSIS may need to accept a referral from a source such as Birth Match, another host CEP agency, Adoptions, etc.

## 2.3 Use Cases

Figure 2-2 shows a high-level use case model for Intake and the Maltreatment report screening processes. It illustrates the workflow overlap between intake and maltreatment because typically the intake worker and maltreatment screener are the same person. If the intake contact concerns maltreatment, the intake worker may need to record maltreatment information and/or take certain maltreatment related actions as an extension of the intake process.

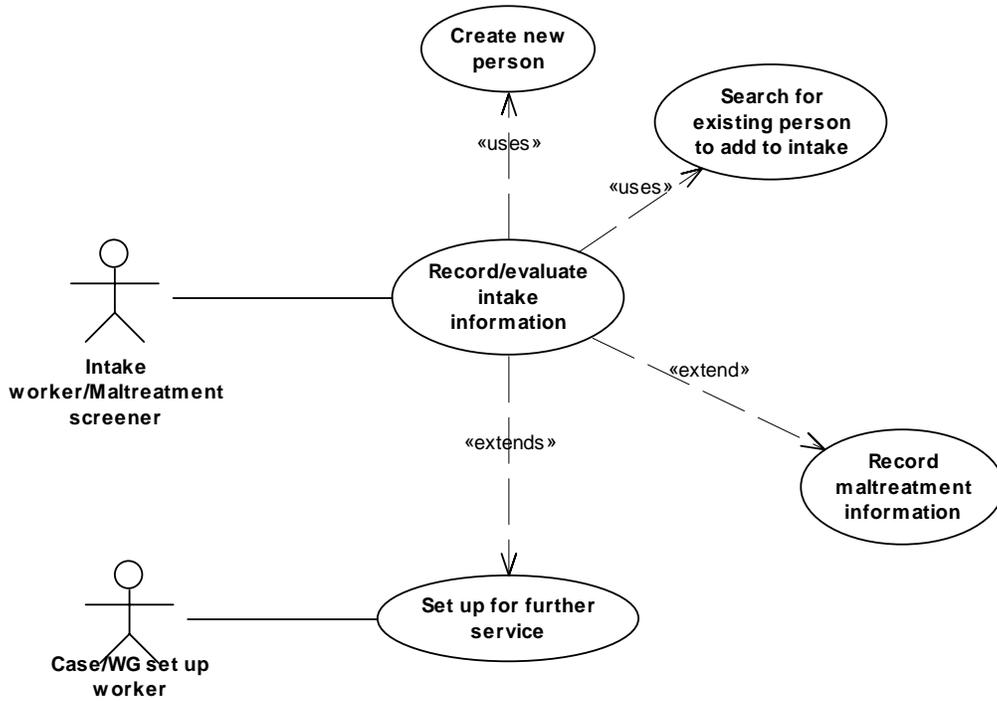


Figure 2-2: High-level Intake Use Case Model

## 2.4 Security

No changes to security are introduced with V4.3. Any existing worker profile with the ability to create intakes in V4.2 will continue to allow access to the intake functionality in V4.3.



# SECTION THREE: NON-FUNCTIONAL REQUIREMENTS

This section is used for the Intake specification.



## SECTION FOUR: EXCEPTION CONDITIONS AND ERROR HANDLING

This section is not used for the Intake specification.



# SECTION FIVE: SUPPORTABILITY AND USABILITY

This Section is not used for the Intake specification.



# SECTION SIX: DEVELOPMENT AND OPERATING ENVIRONMENTS

This Section is not used for the Intake specification.



## SECTION SEVEN: SYSTEM INTERFACES

This Section is not used for the Intake specification.



# SECTION EIGHT: DESIGN

## 8.0 Introduction

This section describes the Intake design. Terms used in this section are as follows:

Term	Means
Intake workgroup	Refers to all of the related intake information--essentially, it means the contents of the intake workgroup as described below.
Intake	Synonym for the Intake workgroup.
Intake record	Refers to the fields on the Intake table only--essentially, this is information about the contact itself.
Child maltreatment report record	In this specification, the child maltreatment report refers to a CP_RPT record that is associated with an intake workgroup.

### Design Concepts:

1. The intake workgroup is now displayed rather than hidden. The top level workgroup node displays fields from both the Intake workgroup and the intake record.
2. A new intake is created from the Intake Log. This follows the practice of creating new records from searches rather than directly from the menu. This concept was introduced with SSIS Fiscal.
3. The intake workgroup displays the standard editable workgroup face sheet screen as introduced in V4.2.
4. With the intake workgroup no longer hidden, the system can provide a standard label for the workgroup. The user may designate a more descriptive name by selecting a participant name or typing an alternative name.
5. The system no longer automatically creates a Child Maltreatment record "behind the scenes". Therefore, the child maltreatment screen tab no longer appears as part of the intake screen. For a child maltreatment report intake type, the worker will click "New Child Maltreatment Report" to create the record. This separation is done as preparation for Adult Maltreatment.
6. The intake workgroup does not transition. It is always closed when finished but may be used to initiate an on-going workgroup. The closed initiating intake workgroup appears in the new workgroup's "Associated Workgroups" node.
7. The closed intake workgroup now serves as the "versioned" or "frozen" intake. The intake snapshot and intake participant tables are no longer needed because the entire intake workgroup is saved "as is." Legacy intakes will have a snapshot report displayed in the workgroup chronology.
8. Although the intake workgroup becomes not editable at the time of disposition/close, any user may add a new case note, edit an existing case note, create a document or create documentation according to standard closed workgroup behavior. Additionally, users with reset errors may reopen the intake workgroup and may replace persons entered in error, according to business rules.
9. Field and table duplication/overlap between the workgroup and the intake record is eliminated because the entire Intake Workgroup is saved. Fields such as Staff

ID, Program, Status already exist on the Workgroup table and are not repeated on the Intake record. The Intake Participant table is no longer needed to identify the participants associated with the Intake because the workgroup is saved "as is."

10. Static folders are added to the Intake Log for: My Recent Intakes and All recent Intakes (defined by the user), Intakes Needing Action (system calculated), and Recent Intake Participants. These folders are in addition to the standard search. Users can still create, name, and save customized searches.
11. The revised Intake search grid returns only intake and intake workgroup related fields. All child maltreatment report fields are removed from the Intake search itself.
12. Users may edit an intake workgroup information directly from the Intake Log, if the intake workgroup is already opened or can be re-opened.
13. The Intake search interface includes a new search for intake workgroups with child maltreatment reports and will return fields specific to child maltreatment (for example: report status, report track, danger indicator, etc). A future release will include a search for adult maltreatment reports. Both searches, while accessible from the intake log, are documented in the separate maltreatment specifications.

## 8.1 Intake Workgroup

The intake workgroup contains the intake record and related information:

- Information about the intake contact--how it was made, the caller, and what it is about.
- Participants associated with the intake
- List of workers associated with the intake
- Chronology for the intake
- Information about the result of the intake workgroup--it will either become the initiating workgroup for a new assessment or case management workgroup, be referred to an on-going workgroup, or it will be closed with no further action.

If the intake is about child or adult maltreatment, it will also contain child or adult maltreatment report information.

### 8.1.1 Intake workgroup tree-standalone

The common intake workgroup nodes are Staff Assignments, Chronology, and Participants. When the worker creates a new intake, only those nodes appear. If the intake is for child maltreatment, the worker must create a Child Maltreatment Report (or Adult Maltreatment Report in a future release). From the separately created Child or Adult maltreatment report root nodes, the user may then create sub nodes as defined in the individual Maltreatment Report specifications.

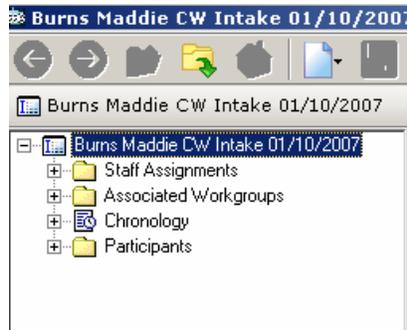


Figure 8-1: Intake Workgroup tree

### 8.1.2 Associated Workgroups node

Each workgroup that has associated workgroups has an “Associated Workgroups” node container that lists the workgroup by type.

This means that a workgroup no longer has an “Intake” node. Rather, the associated closed intake workgroups are listed underneath the Associated Workgroups node. The grid lists information about the workgroup such as the type, the name, start and end dates, and the WG close reason. That way, the user can differentiate between an initiating WG and a referred intake WG.



Figure 8-2: Associated Workgroups node shown in an assessment workgroup

Additionally, by using a standard “Associated Workgroups” node for all workgroups, the Intake workgroup can identify which workgroup it initiated or was referred to. The “Associated Workgroups” node will not be visible in an Intake work group until a workgroup association actually exists.

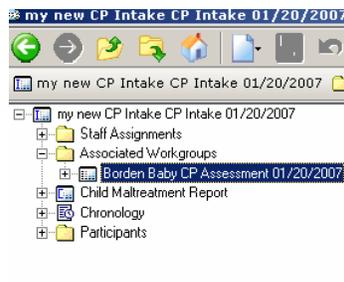


Figure 8-3: Associated Workgroup shown in an intake workgroup

## Associated Workgroups Node Container

All source fields are from the WORK\_GROUP table (400)

Column Heading	Source	Default order
Type	WG_TYPE_CD (displays the code description)	1
Name	WG_LABEL	2
SSIS Workgroup #	WG_ID	3
Start date/time	START_DATE	4
End date/time	END_DATE	5
Close Reason	REASON_ENDED_CD	6
Program	SUBPROG_ID (displays the program description)	Choose columns
SSIS Case #	FOLDER_ID	Choose columns
County workgroup #	CNTY_CASE_NUM	Choose columns

### 8.1.3 Creating a new Intake Workgroup

A new Intake Workgroup is created from the Intake Log via the “New Intake Workgroup” menu option or from the quick add button.

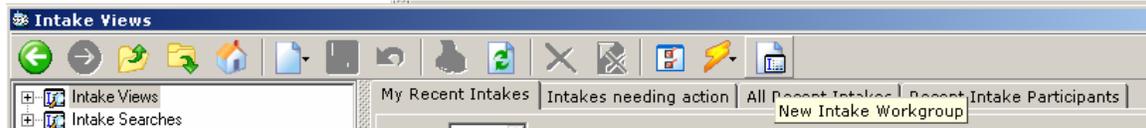


Figure 8-4: Intake Log showing "New Intake Workgroup" Quick Add button

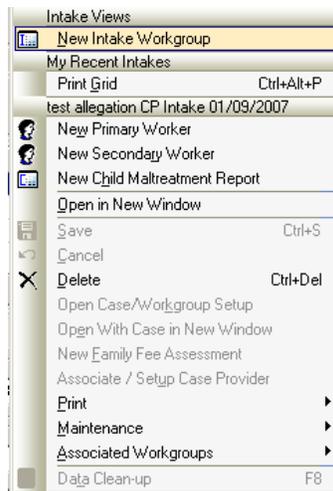


Figure 8-5: Intake Workgroup menu showing "New Intake Workgroup"

### 8.1.4 The Intake Workgroup main node

The top level intake workgroup node has two tabs. Fields and business rules are detailed in later in this document.

## Intake tab

This tab contains fields from both the Intake Workgroup and the Intake record. Although the workgroup table fields are visible and editable on the workgroup tab, they are also shown on the intake screen for continuity. In other words, by showing these workgroup fields on the intake screen, the user does not have to enter go back and forth between tabs to enter general information about the intake. The only reason that a user would need to click the workgroup tab is to edit intake workgroup information such as the label or security.

The screenshot shows the 'Intake' tab selected. The 'Identification' section contains two text boxes: 'SSIS Intake #' with the value '118822099' and 'Intake 11/07/2006'. The 'Detail' section contains three dropdown menus: 'Start date/time' with '11/07/2006 09:20 AM', 'Method', and 'Intake type'. A yellow warning icon is visible next to the 'Intake type' dropdown. The 'Problem' field is partially visible at the bottom.

Figure 8-6: Intake tab

## Workgroup Face sheet tab

The intake workgroup top level node displays the standard workgroup face sheet (introduced in V4.2) as a tab on the intake workgroup. Editable fields are detailed later in this specification.

The screenshot shows the 'Workgroup' tab selected. The 'Identification' section contains four fields: 'Name' with 'Intake 11/07/2006', 'Description' (dropdown), 'SSIS workgroup #' with '118822094', and 'Type' with 'Intake'. The 'County workgroup #' field is empty.

Figure 8-7: Workgroup face sheet tab

## Action Menus

### Workgroup menu

For performance reasons, the following menu items are enabled as detailed below but some have additional validation for specific error conditions.

Menu item	Enabled when	Result
New Child Maltreatment Report	WG type = 3 and workgroup end date is blank	If no error, opens the entry screen for a new child maltreatment report
Error: CP report already exists		Message: Cannot create a new "Child Maltreatment Report" because one already exists. Would you like to go to it?
Menu item	Visible / Enabled when	Result
Open Case/WG set up	Visible when: WG type = 3 and Workgroup end date is valued  Enabled when: End reason is "go forward"	If no error, opens Case/WG set up screen
Error: Intake WG is already associated with another workgroup.		Message: This Intake workgroup has already been associated.
Error: End reason is 21 (refer to current WG) and no workgroup meets matching criteria		Message: Cannot refer - no workgroup with matching participants
Menu item	Enabled when	Result
Maintenance Re-open workgroup	All of the following are true: <ul style="list-style-type: none"> <li>WG type = 1,2,3</li> <li>Workgroup status = closed</li> <li>User has reset errors</li> </ul>	If no errors, open confirmation dialog  Upon OK, clears Intake WG end date, destruction date, close reason and sets intake WG status to open
Error: Intake WG is already associated with another WG		Message: An associated intake cannot be re-opened
Error: If Intake WG, then "now" must be =< than 30 days from the Intake WG end date		Message: This Intake workgroup cannot be re-opened after 30 days.
Menu item	Visible/Enabled when	Result
Associated workgroups Detach Referred Intake from Associated Workgroup	Visible when WG type = 3  Enabled when all of the following are true: <ul style="list-style-type: none"> <li>Intake workgroup status = closed</li> <li>User has reset errors</li> <li>this Intake WG is associated with another WG</li> </ul>	If no errors, opens the confirmation dialog  Confirmation message: "Workgroup Association will be removed. Any allegations or chronology copied from the intake workgroup [WG name] will remain in the associated workgroup. Do you wish to continue and remove the association?"
Error: Intake workgroup close reason not =21 (Refer to current workgroup)		Message: Only referred intakes can be detached
Error: Intake workgroup is not associated with another workgroup.		Message: An associated workgroup does not exist - cannot detach
Menu item	Enabled when	Result
Associated workgroups Delete Workgroup and Revert to Intake	All of the following are true: <ul style="list-style-type: none"> <li>WG type = 1 or 2</li> <li>WG status = open</li> <li>User has "reset errors"</li> <li>User has "delete workgroup"</li> </ul>	If no error, opens standard WG delete confirmation dialog  The associated WG is deleted and only the intake workgroup remains.
Error: Workgroup does not have an associated WG type 3 (Intake)		Message: An associated intake workgroup does not exist - cannot roll back
Error: Workgroup has multiple associated WGs		Message: Other associated workgroups exist - cannot roll back
Error: Workgroup's associated CP report has either: <ul style="list-style-type: none"> <li>CP_RPT_END_DT valued and CP_RPT_STATUS = 03 (Assessment complete, or</li> <li>ALLEG_DETERM_IND valued on any associated allegation.</li> </ul>		Message: This workgroup cannot be deleted because maltreatment determinations and/or conclusions exist

### Participant menu (Participant node)

Menu item	Enabled when	Result
New Client	WG status = open	
Add Existing Client	WG status = open	
New Collateral	WG status = open	
Add Existing Collateral	WG status = open	
Maintenance Replace Person in Workgroup	User has reset errors	Opens person search

### Chronology menu (Chronology node)

Menu item	Enabled when	Result
New case note	Always	Opens case note entry
New document	Always	Opens document dialog
New documentation	Always	Opens documentation dialog

### Staff assignment (Staff assignment node)

The "New Worker" menu item replaces the current "change intake worker" menu item. It uses the standard staff assignment functionality introduced in V4.2

Menu item	Enabled when	Result
New Primary Worker	Intake WG status = open	Opens the staff assignment screen. Defaults to primary worker (read only).
New Secondary Worker	Intake WG status = open	Opens the staff assignment screen. Defaults to not primary worker (read only).

### Quick Add buttons (Intake Entry screen)

Button	Node	Enabled
New or Existing Client	Intake WG node Participants node	Intake WG status = open
New or Existing Collateral	Intake WG node Participants node	Intake WG status = open
New Child Maltreatment Report	Intake WG node	Intake WG status = open  If a CP report already exists, the following message dialog is shown:  Cannot create a new "Child Maltreatment Report" because one already exists. Would you like to go to it?
New Case Note	Intake WG node	Always



Figure 8-8: Intake entry screen showing Quick Add buttons

## 8.1.5 Closed Intake Workgroup

### 8.1.5.1 Closing the intake workgroup

Closing the intake workgroup is equivalent to entering an intake disposition in earlier releases. New workgroup close codes are added in this release to allow appropriate choices for closing the intake workgroup.

The selected code describes what happens next. The intake workgroup close reasons are informally grouped as “stop at intake” or “go forward.” For example, the close reason “Other agency responsible” is a “stop at intake” reason while “Open for assessment-Intake complete” is a “go forward” reason.

Regardless of the user’s choice, the intake workgroup closing business rules apply. If all rules are met, the user may enter a close date. Upon save, the intake workgroup is closed. If any rules fail, the system notifies the user that data clean up errors exist--the user cannot close the intake workgroup.

### 8.1.5.2 Editing the Intake Workgroup after close

Intake workgroups follow the standard behavior for editing closed workgroups. The intake workgroup is not editable while closed, however anyone may add a new case note, document or documentation. A user with reset errors is allowed to use the “replace person” function.

While the intake workgroup is closed and locked, a user with reset errors can re-open the workgroup via the WG Maintenance menu option until either of the following occurs:

- 30 days has elapsed since the intake WG close date or
- the intake workgroup initiates another workgroup.

### 8.1.5.3 Going forward

Once the workgroup is closed, certain close reasons indicate that further service will result. This closed workgroup may become the initiating workgroup for a new assessment or case management workgroup. Alternately, it may be referred to an appropriate existing workgroup. The user will open the case workgroup set up screen to create the new workgroup or to select the workgroup receiving the referral.

An intake workgroup with a “go forward” disposition that has not “gone forward” is identified on the intake log in by the appearance of the icon shown in the screenshot below. This is equivalent to WG indicator flag column earlier releases. For example: the icon would identify a closed intake workgroup with a close reason of “Refer to

current workgroup-intake complete” that has not actually been referred. Or, the icon would display for an intake workgroup with the close reason “Open for assessment-intake complete” where no new workgroup had been initiated.

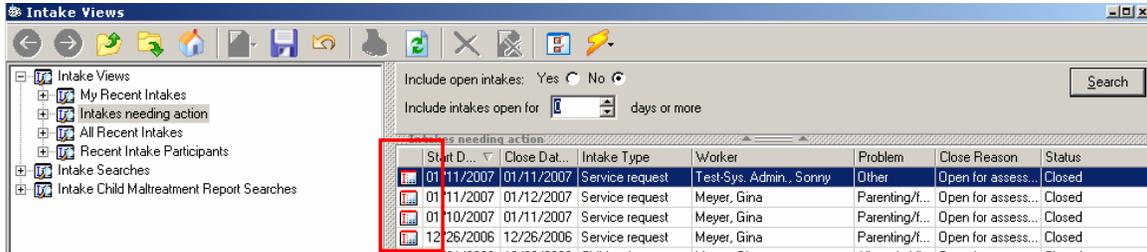


Figure 8-9: Icon to designate Intakes needing action

### Copying information from the intake workgroup to the new workgroup

When an intake workgroup initiates a new workgroup, the system copies the following as part of the set up process for the new workgroup:

Intake type	Items copied from intake workgroup
All except for child maltreatment report	Chronology only Workgroup participants
Child maltreatment report	Chronology Workgroup participants Child maltreatment report Allegations Initial notifications Facility information

## 8.2 Intake Workgroup Entry

### 8.2.1 Intake entry tab

Intake | Workgroup

Identification

SSIS Intake #: 118822059 CP Intake 11/06/2006

Detail

Start date/time: 11/06/2006 10:12 AM Method: Phone

Intake type: Child maltreatment report

Problem: Alleged child maltreatment

Program: Child Protective Services

Source:

Caller:

Disposition / Close

Close reason:

Close date / time:

Additional Information

Description of need | Comments | Staff warning

E

Action ▾

Figure 8-10: Intake Main Entry Screen Tab

#### Screen Purpose:

- To record information about a contact with the county agency
- To classify the contact as a request for service, a request for information, or a report of maltreatment
- To record how the intake was concluded

#### Intake Screen Field List

The following chart lists the fields on the Intake tab. This screen contains fields from both the Intake Workgroup and the Intake record. Although the workgroup table fields are visible and editable on the workgroup tab, they are also shown on the intake screen for continuity. In other words, by showing these workgroup fields on the intake screen, the user does not have to go back and forth between tabs to enter the intake workgroup fields.

Screen label	Table/Field	Description/Comments
SSIS Intake #	INTAKE.INTAKE_ID	System generated-read only
Start date/time	WORK_GROUP.START_DT	Defaults to "now" for a new intake workgroup.  Also displayed on the workgroup face sheet tab.
Method	INTAKE_METHOD_CD	Code to describe the contact method.
Source	INTAKE.IN_SOURCE_CD	Code to describe the source of the intake.
Intake type	INTAKE.TYPE_CD	Code to describe the classification for this intake.
Caller	INTAKE.SOURCE_PERSON_ID	Person who called. The system displays the name of the caller.
Problem	INTAKE.IN_PRES_PROB_CD	Code to describe the problem for this intake.
Program	WORK_GROUP.SUBPROG_ID	Program for this intake workgroup. The screen displays the name of the program.  Also displayed on the workgroup face sheet tab.
Close reason	WORK_GROUP.REASON_ENDED_CD	Code to describe the reason that the intake workgroup is closed--it will either initiate a new workgroup, be referred to an existing workgroup, or will not result in service.  Also displayed on the workgroup face sheet tab.
Close date/time	WORK_GROUP.END_DT	Close date for the intake workgroup.  Also displayed on the workgroup face sheet tab.
Description of need	INTAKE.DESCR_OF_NEED	Text description of need
Comments	INTAKE.COMMENTS	Text comments
Staff Warning	INTAKE.STAFF_WARNING	Text for staff warning notes.

## 8.2.2 Workgroup Face sheet tab

Figure 8-11: Intake Workgroup Face Sheet tab

### Workgroup Field List

The intake workgroup top level node displays the standard workgroup face sheet as a tab on the intake workgroup. The WORK\_GROUP table fields listed in for the Intake entry screen are also enabled on the Workgroup face sheet tab.

Additionally, this tab allows the user to edit the default intake workgroup security, the intake unit, or customize the intake workgroup name.

In an intake workgroup, only the following WORK\_GROUP fields are enabled:

Screen label	Table/Field	Description/Comments
Description	WORK_GROUP.WG_DESC	User-entered portion of the calculated workgroup label. The worker may select a participant or enter text.
Program	WORK_GROUP.SUBPROG_ID	Intake workgroup program. Functions exactly as it does on the intake entry screen.  While it can be entered from this tab, it is typically entered/edited on the intake screen.

Screen label	Table/Field	Description/Comments
Start date/time	WORK_GROUP.START_DT	Intake workgroup start date/time. Functions exactly as it does on the intake entry screen.  While it can be entered from this tab, it is typically entered/edited on the intake screen.
Close reason	WORK_GROUP.REASON_ENDED_CD	Intake workgroup program. Functions exactly as it does on the intake entry screen.  While it can be entered from this tab, it is typically entered/edited on the intake screen.
Close date/time	WORK_GROUP.END_DT	Close date for the intake workgroup. Functions exactly as it does on the intake entry screen.  While it can be entered from this tab, it is typically entered/edited on the intake screen
Unit	WORK_GROUP.UNIT_ID	For an intake workgroup, the unit defaults to the intake workgroup unit set in county preferences.  This field will only need to be edited if the intake workgroup unit must be changed.
Access restriction	WORK_GROUP.READ_RESTRICT_CD	For an intake workgroup, the unit defaults to the intake workgroup access restriction set in county preferences.  This field will only need to be edited if the intake workgroup unit must be changed.

## 8.2.3 Business Rules

Terminology for documenting business rules.

Term	Means
General rule	May define a term used in other rules  May describe a conceptual business level rule and generally describe how it is implemented.
Field rule	For one field on a screen, the field rule defines: <ul style="list-style-type: none"> <li>• default values, if any</li> <li>• when the field is enabled</li> <li>• the point at which the field is required to save--at that point, if the field is blank the system displays the standard error marker and the user cannot save the record</li> <li>• the point at which the system displays a warning marker along with the text of the warning message</li> <li>• all error conditions for the field and corresponding messages--when the field is valued with invalid data the system displays the standard error marker with red squiggly and the user cannot save the record.</li> <li>• impact to other fields/tables when the user changes a field value</li> </ul>

### 8.2.3.1 General Rules

The following table defines terms used in business rule logic:

Term	Means
Is I&R	INTAKE.INTAKE_TYPE_CD = 2
Is Transferred CP Case Management	INTAKE.INTAKE_TYPE_CD = 7
Is Licensing Related	INTAKE.INTAKE_TYPE_CD = 8
Is Service Request	INTAKE.INTAKE_TYPE_CD = 3

Term	Means
Is Coop Inv	INTAKE.INTAKE_TYPE_CD = 5
Is Child Malt Intake	INTAKE.INTAKE_TYPE_CD = 4
Is Non-Child Malt Intake	INTAKE.INTAKE_TYPE_CD = 2, 3, 5, 6, 7, 8
Is Adult Malt Intake	INTAKE.INTAKE_TYPE_CD = 6
Is CP program	WORK_GROUP.SUBPROG_ID = 91152125 (or the SUBPROG record where BRASS_PROGRAM=1 and SUBPROG_NUM=10)
Is Stop at Intake	WORK_GROUP.REASON_ENDED_CD=23, 24, 25, 26, 27, 28
Is Go Forward	WORKGROUP.REASON_ENDED_CD=20, 21, 22

The following table lists high level business rules. These general high level rules are included to provide a business framework for understanding the more detailed field rules, external validations, and filter selection choices.

Business Rule	Implemented by
Appropriate close reason choices are based upon the type of intake.	<u>Filters:</u> Close reason choices are filtered according to intake type. (See chart of intake type/close reasons)
A specific intake type requires a valid problem and valid program unless it is I & R.	<u>Filters:</u> Problem and program choices filtered based on type. (See chart of valid type, problem, and program combinations below.)
An I & R intake does not require a problem and program unless it is referred to another workgroup. Then it requires a program.	<u>Field enabling:</u> Fewer fields must be valued in order to enable close reason.  <u>Filters:</u> If no program exists, only Stop At Intake close reasons are provided. If program exists, then refer to current workgroup is an allowed choice.
If the intake type is a Child Maltreatment then a valid Child Maltreatment report must exist before closing the intake.	<u>External validations:</u> When the user selects a close reason, the system validates to ensure the following: A child maltreatment report exists and all required screening data has been entered.  <u>Field enabling:</u> The close date is not enabled until no errors exist.
If the intake workgroup will be referred to another workgroup, an appropriate workgroup must exist.	<u>External validations:</u> Appropriate workgroup must exist. The appropriate workgroup is defined by business rules.

### 8.2.3.2 Field Business Rules

The following section applies to user-enterable fields on the Intake screen. For intakes, the warning messages are displayed on the entry screen only and are never included in the save error dialog.

Table: WORK_GROUP	Field: START_DT	Label: Start date/time
<b>Default value</b>	Current date/time of intake workgroup creation	
<b>Enabled when</b>	Intake workgroup status is open	
<b>Required when</b>	Always	
<b>Warning when</b>	Never	
<b>Error when</b>	Start date/time is a future date/time	Message: "Start date/time" cannot be a future date/time.
	Start date/time is > than Close date/time.	Message: "Start date/time" must be before "Close date/time."
<b>On Change</b>	N/A	

Table: INTAKE	Field: METHOD_CD	Label: Method
---------------	------------------	---------------

<b>Table:</b> INTAKE	<b>Field:</b> METHOD_CD	<b>Label:</b> Method
<b>Default value</b>	None	
<b>Enabled when</b>	Intake workgroup status is open	
<b>Required when</b>	Never	
<b>Warning when</b>	Never	
<b>Error when</b>	Never--all choices are valid	
<b>On Change</b>	N/A	

<b>Table:</b> INTAKE	<b>Field:</b> INTAKE_TYPE_CD	<b>Label:</b> Type
<b>Default value</b>	None	
<b>Enabled when</b>	Intake workgroup status is open	
<b>Required when</b>	Close reason is valued	
<b>Warning when</b>	Close reason is blank	Message: "Type" is required for disposition/close
<b>Error when</b>	Never--all choices are valid	
<b>On Change</b>	Apply filter (Type/ Problem/Program) If valid problem, do nothing. Otherwise, clear problem & program values.  Apply filter (Type/Program/Close Reason) If valid close reason for program, do nothing. Otherwise, clear close reason.	

<b>Table:</b> INTAKE	<b>Field:</b> IN_PRES_PROB_CD	<b>Label:</b> Problem
<b>Default value</b>	None	
<b>Enabled when</b>	Intake workgroup status is open	
<b>Required when</b>	Close reason is valued and Intake is not I & R	
<b>Warning when</b>	Never	
<b>Error when</b>	Never--filtering ensures valid choices	
<b>On Change</b>	Apply filter (Type, Problem, Program) If valid program, do nothing. Otherwise, clear program value.	

<b>Table:</b> WORK_GROUP	<b>Field:</b> SUBPROG_ID	<b>Label:</b> Program
<b>Default value</b>	None	
<b>Enabled when</b>	Intake workgroup status is open	
<b>Required when</b>	Close reason is valued and reason is Go forward	
<b>Warning when</b>	Never	
<b>Error when</b>	Never--filtering ensures valid choices	
<b>On Change</b>	N/A	

<b>Table:</b> INTAKE	<b>Field:</b> IN_SOURCE_CD	<b>Label:</b> Source
<b>Default value</b>	None	
<b>Enabled when</b>	Intake workgroup status is open	
<b>Required when</b>	Never	
<b>Warning when</b>	Never	
<b>Error when</b>	N/A	
<b>On Change</b>	Filter out legacy code	

<b>Table:</b> INTAKE	<b>Field:</b> SOURCE_PERSON_ID	<b>Label:</b> Caller name
<b>Default value</b>	None	
<b>Enabled when</b>	Intake workgroup status is open (except when new record not saved)	
<b>Required when</b>	Never	
<b>Warning when</b>	Never	
<b>Error when</b>	N/A	
<b>On Change</b>	N/A	

<b>Table:</b> WORK_GROUP	<b>Field:</b> REASON_ENDED_CD	<b>Label:</b> Close reason
<b>Default value</b>	None	
<b>Enabled when</b>	Intake workgroup status is open	

<b>Table: WORK_GROUP</b>		<b>Field: REASON_ENDED_CD</b>	<b>Label: Close reason</b>
<b>Required when</b>	N/A		
<b>Warning when</b>	Close reason is blank and when all fields listed above for enabling this field are valued	Message: "Close reason" is required to close intake.	
<b>Error when</b>	Never--all external validations handled via data clean up		
<b>On Change</b>	Clear WORK_GROUP.END_DATE, if valued		

<b>Table: WORK_GROUP</b>		<b>Field: END_DT</b>	<b>Label: Close date/time</b>
<b>Default value</b>	None		
<b>Enabled when</b>	Intake workgroup status is open		
<b>Required when</b>	Close reason is valued and no data clean up errors exist		
<b>Warning when</b>	Close reason is valued and has data clean up	Message: "Data clean up ...press F8 etc(standard message)"	
<b>Error when</b>	Close date/time is a future date/time.	Message: "Close date/time" cannot be a future date/time.	
	Start date/time is > than close date/time	Message: "Start date/time" must be before "Close date/time."	
<b>On Change</b>	N/A		
<b>On Save</b>	Set WORK_GROUP.STATUS = closed		

<b>Table: INTAKE</b>		<b>Field: DESCR_OF_NEED</b>	<b>Tab: Description of need</b>
<b>Default value</b>	None		
<b>Enabled when</b>	Intake workgroup status is open		
<b>Required when</b>	Never		
<b>Warning when</b>	Never		
<b>Error when</b>	Never		
<b>On Change</b>	If, "Clear" button clicked, then show confirmation dialog.	Message text: Clear "Description of need?"	
	Otherwise, N/A		
<b>Note</b>	Both the "Editor" and "Clear" buttons are disabled when the intake workgroup is closed.		

<b>Table: INTAKE</b>		<b>Field: INTAKE_COMMENTS</b>	<b>Tab: Comments</b>
<b>Default value</b>	None		
<b>Enabled when</b>	Intake workgroup status is open		
<b>Required when</b>	Never		
<b>Warning when</b>	Never		
<b>Error when</b>	Never		
<b>On Change</b>	N/A		

<b>Table: INTAKE</b>		<b>Field: STAFF_WARNING</b>	<b>Tab: Staff warning</b>
<b>Default value</b>	None		
<b>Enabled when</b>	Intake workgroup status is open		
<b>Required when</b>	Never		
<b>Warning when</b>	Never		
<b>Error when</b>	Never		
<b>On Change</b>	N/A		

### 8.2.3.3 Data clean up validations

The following data clean up validations run whenever the user

- enters a close reason and exits the field or
- activates the screen when the close reason is valued and the close date is blank.

Term	Means
Matching participant	A non-intake type workgroup exists with at least at least one participant in common with the intake workgroup. This workgroup may be open or closed.
Is Child Malt Intake	Intake type code = 4 (Child maltreatment report)
Is CP Program	WORK_GROUP.SUBPROG_ID=91152125
Has/Have Child Malt Report	CP_RPT record exists for a specific workgroup.
Is Screened In	CP_RPT exists for this intake workgroup where the CP_RPT.CP_RPT_STATUS_CD = 01 (Screened in)
Is Screened Out	CP_RPT exists for this intake workgroup where the CP_RPT.CP_RPT_STATUS_CD = 02 (Screened out)

### Intake Workgroup close validations

Condition	Rule	Message/Help Desc.
Is Not Child Malt Intake and Has Child Malt Report	A child maltreatment report (CP_RPT) cannot exist when the intake type is not Child Malt Intake	<u>Message:</u> Intake cannot have a Child maltreatment report unless the Intake type is "Child maltreatment report"
		<u>Help Description:</u> Intake type is not Child maltreatment report. Either change the intake type to "Child maltreatment report" or delete the child maltreatment report record if this is not about child maltreatment.
Is Child Malt Intake and Has no Child Malt Report	A screened child maltreatment report (CP_RPT) must exist for a Child Malt Intake.	<u>Message:</u> Intake type [value] requires a screened child maltreatment report.
		<u>Help Description:</u> The intake type is "Child maltreatment report". Either change the intake type or create a new child maltreatment report for this intake. Enter all screening information prior to closing the intake.
		<u>Note:</u> This error message will only appear if a more specific message cannot be found. For example enough data exists on the intake record to require that the report, once created must be screened in or out.
Is Child Malt Intake and Is Screened In	Program must be CP for a screened in Child Maltreatment Intake.  Note: if screened out, then any valid program is allowed (see Type/Problem/Program filter chart below)	<u>Message:</u> Child maltreatment report must be screened out when "Program" is not Child Protective Services
		<u>Help Description:</u> CP is the only valid program for a screened in child maltreatment report. Change the program or screen out the child maltreatment report.

### Additional Data Clean Up Validations

The following section describes the close reasons or close reason/condition combinations that need additional validations beyond those described above in the "Intake Workgroup close validation" section. Note: Not all close reason choices need additional validation. For the other close reasons, the filters provide all required validation.

<b>If close reason =</b>	<b>20 (Open for assessment - Intake complete)</b>	
<b>And Condition</b>	<b>Rule</b>	<b>Message/Help Desc.</b>
	Intake WG must have at least one participant	<u>Message:</u> Intake Workgroup must have at least one participant <u>Help Description:</u> Intake Workgroup must have at least one participant
Is Child Malt Intake and Is CP Program	Must have screened in Child Malt Report with no data clean up errors	<u>Message:</u> Intake type "Child maltreatment report" requires a screened in child maltreatment report <u>Help Description:</u> The intake type is "Child maltreatment report". Either change the intake type or create a screened in report for this intake.
Is Child Malt Intake and Is not CP Program	Must have screened out Child Malt Report	<u>Message:</u> Child maltreatment report must be screened out when "Program" is not Child Protective Services. <u>Help Description:</u> Child maltreatment report must be screened out when "Program" is not Child Protective Services.

<b>If close reason =</b>	<b>21 (Refer to current workgroup - Intake complete)</b>	
<b>And Condition</b>	<b>Rule</b>	<b>Message/Help Desc.</b>
	Intake WG must have at least one participant	<u>Message:</u> Intake Workgroup must have at least one participant <u>Help Description:</u> Intake Workgroup must have at least one participant
	Workgroup must exist with matching participants	<u>Message:</u> Cannot refer- No workgroup with matching participants <u>Help Description:</u> Cannot refer- No workgroup with matching participants
Is Child Malt Intake and Is CP Program	Must have screened in Child Malt Report with no data clean up errors.	<u>Message:</u> Intake type "Child maltreatment report" requires a screened in child maltreatment report <u>Help Description:</u> The intake type is "Child maltreatment report". Either change the intake type or create a screened in report for this intake.
Is Child Malt Intake and Is not CP Program	Must have screened out Child Malt Report	<u>Message:</u> Child maltreatment report must be screened out when "Program" is not Child Protective Services <u>Help Description:</u> Child maltreatment report must be screened out when "Program" is not Child Protective Services

Is Child Malt Intake and Is CP Program Is Screened In	Matching WG with additional criteria must exist.	<u>Message:</u> Cannot refer-no workgroup with matching criteria
	Matching WG means that all are true: <ul style="list-style-type: none"> <li>• Open CP Assessment WG</li> <li>• Cp report status = screened in</li> <li>• Have matching report track</li> <li>• Allegation with a common victim or offender</li> </ul>	<u>Help Description:</u> The matching criteria is as follows: An open Child Protective Services Assessment workgroup, a child maltreatment report with a status of "Screen in for assessment", a child maltreatment report with the same current report track, an allegation with a common victim or offender.

<b>If close reason =</b>	28 (Screened out maltreatment report)	
<b>And Condition</b>	<b>Rule</b>	<b>Message/Help Desc.</b>
	Must have a screened out Child Malt Report	<u>Message:</u> Child maltreatment report must be screened out when "Closing reason" is "Screened out maltreatment report"  <u>Help Description:</u> Child maltreatment report must be screened out when "Closing reason" is "Screened out maltreatment report"
Is Child Malt Intake Is not CP Program	Must have a screened out Child Malt Report	<u>Message:</u> Child maltreatment report must be screened out when "Program" is not Child Protective Services  <u>Help Description:</u> Child maltreatment report must be screened out when "Program" is not Child Protective Services

### 8.2.3.4 Filters

The following tables define the dropdown choices for fields with choice dependencies. If the number of choices is greater than one, then no default value is shown--the user must always select from the list. If there is only one choice, then the system sets that value by default and the user does not need to make a selection.

#### Type/Problem/Program

Each intake type has a set of valid problem choices. Each combination of intake type and problem has a set of valid program choices.

Type	Problems	Programs
2 Information and referral	All	All
8 Licensing related	24 Adoptive home study	180 CFC
8 Licensing related	25 Alleged license violation	680 AFC 180 CFC 280 CCL
8 Licensing related	23 Request for adult foster care licensure	680 AFC
8 Licensing related	21 Request for child care licensure	280 CCL
8 Licensing related	22 Request for child foster care licensure	180 CFC
6 Adult maltreatment report	16 Alleged vulnerable adult at risk/maltreatment	610 APS 600 AS
4 Child maltreatment report	15 Alleged child maltreatment	110 CP 100 CW 140 MP

Type	Problems	Programs
		120 EID 300 CD 420 CMH 500 DD 130 ALS
5 Child maltreatment cooperative investigation	15 Alleged child maltreatment	100 CW
7 CP case management transfer	15 Alleged child maltreatment	110 CP
3 Service request	16 Alleged vulnerable adult at risk/maltreatment 14 Chemical Abuse/dependency 10 Crime/delinquency/status offense 09 Custody dispute 13 DD 26 Domestic violence 02 Employment/Training 06 Health/self care 03 Housing 01 Income 11 Interpersonal/personal adjust 12 Mental health 07 Minor parent 17 Outside evaluation request 08 Parenting/family interaction 18 Resource list request 05 School 04 Transportation 98 Other	100 CW 120 EID 130 ALS 140 MP 150 A/G 200 CC 300 CD 410 AMH 420 CMH 500 DD 600 AS 670 AC 671 EW 672 CAC 673 CAD 674 TBI

### Type/Close Reason Filters

Note: N/A for program means that program is not considered when filtering valid close reasons. This table includes a program column because the close reasons for Information and Referral are filtered based on whether the program field is valued or blank

Type	Program	Close Reasons
4 Child malt report	N/A	20 Open for assessment - Intake complete 21 Refer to current workgroup - Intake complete 28 Screened out maltreatment report
5 CP Cooperative Inv	N/A	20 Open for assessment - Intake complete 24 Other agency responsible 25 Resource not available 26 Request withdrawn 27 No further action needed
7 CP Case mgmt transfer	N/A	22 Open for case management - Intake complete 24 Other agency responsible 25 Resource not available 26 Request withdrawn 27 No further action needed
6 Adult malt report	N/A	20 Open for assessment - Intake complete 21 Refer to current workgroup - Intake complete 22 Open for case management - Intake complete 24 Other agency responsible 25 Resource not available 27 No further action needed 28 Screened out maltreatment report

3 Service request	N/A	20 Open for assessment - Intake complete 21 Refer to current workgroup - Intake complete 22 Open for case management - Intake complete 23 Doesn't qualify 24 Other agency responsible 25 Resource not available 26 Request withdrawn 27 No further action needed
2 Info & Referral	Program valued	22 Refer to current workgroup - Intake complete 24 Other agency responsible 25 Resource not available 27 No further action needed
2 Info & Referral	Program blank	24 Other agency responsible 25 Resource not available 27 No further action needed
8 Licensing related	N/A	20 Open for assessment - Intake complete 22 Refer to current workgroup - Intake complete 22 Open for case management - Intake complete 23 Doesn't qualify 24 Other agency responsible 26 Request withdrawn 27 No further action needed

## 8.3 Intake Search/Log

### 8.3.1 Overview

In Version 4.2, the Intake Log provided one search for intake records. The search returned open and closed intakes as well as intakes associated with on-going workgroups. Both intake and child maltreatment data was included in the grid.

Version 4.3 provides additional ways to search for intake information. Child maltreatment data is no longer mixed with intake workgroup information in the search return grids, as detailed below. The rationale for the information separation is that when adult maltreatment is added to SSIS, the intake grid cannot return columns for the two different maltreatment report types. Rather, a separate search is provided for intake workgroups with child maltreatment reports. When the adult functionality is added, a new intake search will be provided for adult reports.

### 8.3.2 Intake Views

The Intake Views node includes four new standard searches set to "search on open." By default, they execute when the user clicks on the tab or the node. The system default setting for "recent" is 30 days but may be re-defined by the user. Once the user has defined "recent," the setting remains. The user is not required to click search unless redefining "recent".

These searches allow the user to view an immediate result set for that user's own recent intakes, all recent intakes, a list of intakes needing action, or all persons associated with recent intakes.

The new folders are in addition to the standard intake search function. Users can still create, name, and save customized searches from the Intake Searches and Child Maltreatment Searches.

Search	Return
My Recent Intakes	Lists the logged on worker's intakes according to that user's definition of recent. The default is 30 days.
Intakes Needing Action	Lists all intake workgroups that require attention.  In V4.3, this list includes workgroups with a "go forward" close reason that have not "gone forward. (visually identified by the icon)  Note: The worker can indicate if the search should include open intake workgroups and if so, indicate the length of time open. The default is to not include open intake workgroups (therefore the default days open is 0). This search feature allows the worker to quickly find intakes that have been started but not finished.
All Recent Intakes	Lists all intakes for the county according to that user's definition of recent. The default is 30 days  This search allows the worker to quickly locate an intake taken by any worker within the specified timeframe
Recent Intake Participants	Lists all intake participants according to the user's definition of recent The default is 30 days.  This search allows the worker to quickly locate an intake for a specific participant within a specified timeframe.

### Search Returns

The following columns are returned in the grid whenever the basis for the search is Workgroup. This grid is used for the following searches with exceptions described in comments:

- My Recent Intakes
- Intakes Needing Action
- All Recent Intakes

Column Heading	Source	Default order	Comment
	Calculated icon	1	Returns a distinct icon for an intake workgroup with a "go forward" disposition that hasn't been acted upon
Workgroup Name	WORK_GROUP.LABEL	2	
Start Date/Time	WORK_GROUP.START_DT	3	
Close Date/Time	WORK_GROUP.END_DT	4	
Intake Type	INTAKE.INTAKE_TYPE_CD	5	
Worker	Calculated from STAFF_WG. Displays the name of the staff person with the most recent assignment date and true primary worker indicator.	6	This column is not shown in "My Recent intakes"
Problem	INTAKE.IN_PRES_PROB_CD	7	
Program	WORK_GROUP.SUBPROG_ID	8	
Close Reason	WORK_GROUP.REASON_ENDED_CD	9	
Source	INTAKE.IN_SOURCE_CD	Choose	
Status	WORK_GROUP.CURR_STATUS_CD	Choose	
SSIS Intake #	INTAKE.INTAKE_ID	Choose	
SSIS WG #	WORK_GROUP.WG_ID	Choose	

Column Heading	Source	Default order	Comment
Unit	WORK_GROUP.UNIT_ID	Choose	Displays the unit discription

The following columns are returned for Recent Intake Participants. Note: the person record is returned rather than the intake workgroup.

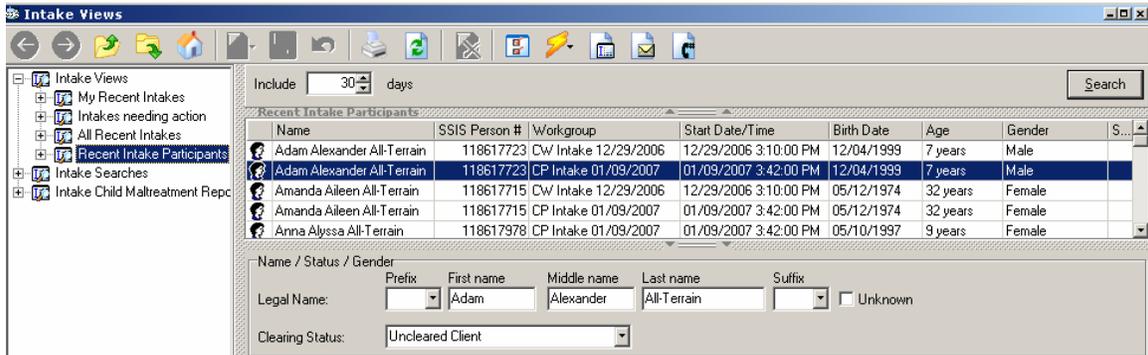


Figure 8-12: Recent Intake Participants

Column Heading	Source	Default order
	Person icon	1
Name	From Person first name, last name	2
SSIS Person #	PERSON.PERSON_ID	3
Workgroup	WORK_GROUP.LABEL	4
Start Date/Time	WORK_GROUP.START_DT	5
Birth Date	PERSON.BIRTH_DT	6
Age	Calculated	7
Gender	PERSON.GENDER	8

### 8.3.3 Intake Search

The standard intake search functions as it did in V4.2, however it is split into two tabs: Intake Main Search and Intake Person Search. Both return a list of intake workgroups as detailed in the previous section.

#### 8.3.3.1 Intake Main Search

##### Search Criteria

Figure 8-13: Intake Main Search criteria

## Search Return

The Intake Main Search returns the columns described in the Intake Views section, above.

	Workgroup Name	Start Dat...	Close Da...	Intake Type	Wor...	Problem	Program	Close Reason
	DD Intake 01/26/2007	01/26/20...	01/26/20...	Service request	J - J...	Developmental...	Developmental Disa...	Open for case manag...
	CP Intake 01/26/2007	01/26/20...	01/26/20...	Child maltreatm...	Mey...	Alleged child m...	Child Protective Serv...	Open for assessment ...
	DD Intake 01/26/2007	01/26/20...	01/26/20...	Service request	Mey...	Developmental...	Developmental Disa...	Open for case manag...
	APS Intake 01/26/2007	01/26/20...	01/26/20...	Adult maltreatm...	J - J...	Alleged vulnera...	Adult Protective Ser...	Open for case manag...
	CW Intake 01/26/2007	01/26/20...	01/26/20...	Service request	Mev...	Parentina/famil...	Child Welfare IGener...	Open for assessment ...

Figure 8-14: Search return for Intake Main Search

### 8.3.3.2 Intake Person Search

#### Search Criteria

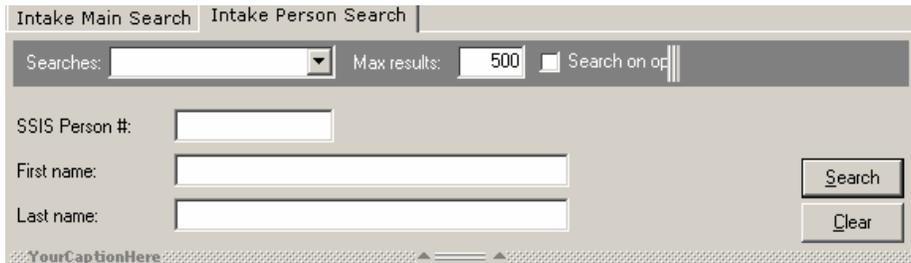


Figure 8-15: Intake Person Search Criteria

#### Search Return

The Intake Person search return includes the Intake participant 's name in the first column. This search return does not include worker.

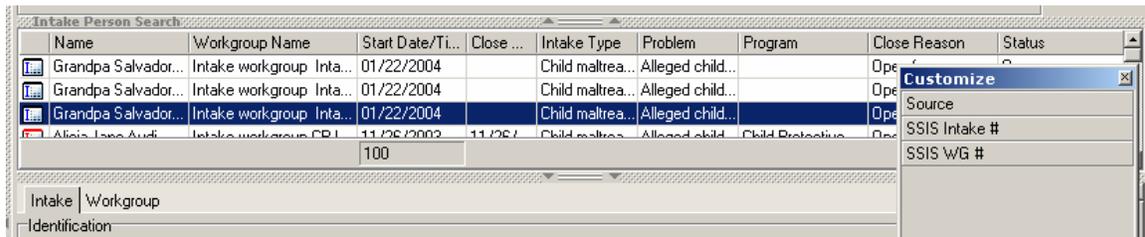


Figure 8-16: Search return for Intake Person Search

### 8.3.4 Intake Child Maltreatment Report Searches

The Intake Child Maltreatment Report Searches located on the Intake Views screen return information about child maltreatment reports that are associated with Intake Workgroups only.

The worker may also search for Child maltreatment reports associated with assessment and case management workgroups from the general workgroup search. That search is described in the Child Maltreatment Report specification.



Figure 8-17: Intake Child Maltreatment Report Searches shown on tabs

### 8.3.4.1 Child Maltreatment Main Search

#### Search criteria



Figure 8-18: Child Maltreatment Main Search Criteria

#### Search return

Workgroup Name	Start Date/Ti...	Close Date/Ti...	Worker	Close Reason	Report St...	Report Track
CP Intake 01/26/2007	01/26/2007	01/26/2007	Meyer, ...	Open for assessment - Intake ...	Screened...	Inv - Family inv...
Boyer Anna CP Intake 01/25/2007	01/25/2007	01/25/2007	Pearso...	Refer to current workgroup - l...	Screened...	FA - Family ass...
Intake 01/24/2007	01/24/2007		Meyer, ...		Screened...	FA - Family ass...
Boyer Anna CP Intake 01/24/2007	01/24/2007	01/24/2007	Pearso...	Open for assessment - Intake ...	Screened...	FA - Family ass...
CP Intake 01/23/2007	01/23/2007	01/23/2007	Meyer, ...	Open for assessment - Intake ...	Screened...	Inv - Family inv...
CP Intake 01/22/2007	01/22/2007	01/22/2007	Meyer, ...	Open for assessment - Intake ...	Screened...	Inv - Family inv...
CP Intake 01/22/2007	01/22/2007	01/22/2007	Meyer, ...	Open for assessment - Intake ...	Screened...	Fac - Facility in...
my new CP Intake CP Intake 01/20/...	01/20/2007	01/20/2007	Hodgso...	Open for assessment - Intake ...	Screened...	FA - Family ass...
CP Intake 01/20/2007	01/20/2007		Hodso...			FA - Family ass...

Figure 8-19: Child Maltreatment Report Main Search Return

Column Heading	Source	Default order
	Calculated icon	1
Workgroup Name	WORK_GROUP.LABEL	2

Column Heading	Source	Default order
Start Date/Time	WORK_GROUP.START_DT	3
Close Date/Time	WORK_GROUP.END_DT	4
Worker	Calculated from STAFF_WG. Displays the name of the staff person with the most recent primary worker assignment date	5
Close Reason	WORK_GROUP.REASON_ENDED_CD	6
Report Status	CP_RPT.CP_RPT_STATUS_CD	7
Report Track	CP_RPT_TRACK.TRACK_CD	8
Investigation Reason	CP_RPT_TRACK.INV_TRACK_REASON_CD	Choose
SSIS Intake #	INTAKE.INTAKE_ID	Choose
SSIS WG #	WORK_GROUP.WG_ID	Choose
SSIS Report #	CP_RPT.CP_RPT_ID	Choose

### 8.3.4.2 Child Maltreatment Victim/Offender Search Search Criteria

Figure 8-20: Victim/Offender Search criteria

### Search return

Figure 8-21: Victim/Offender Search return grid

Column Heading	Source	Default order
	Victim icon	1
Victim	CP_ALLEGATION.VICTIM_ID	2
Victim Desc	CP_ALLEGATION.VICTIM_DESC	3
Offender	CP_ALLEGATION.OFFENDER_ID	4
Offender Desc	CP_ALLEGATION.OFFENDER_ID	5
Workgroup Name	WORK_GROUP.LABEL	6
Close Date/Time	WORK_GROUP.END_DT	Choose
Close Reason	WORK_GROUP.REASON_ENDED_CD	Choose
SSIS Intake #	INTAKE.INTAKE_ID	Choose
SSIS WG #	WORK_GROUP.WG_ID	Choose
Start Date/Time	WORK_GROUP.START_DT	Choose

## RELATED DOCUMENTS

The following documents are related to this specification.

Document	Path	How Related
SS Child Maltreatment Report .doc	M:\Everyone\software specifications	The child maltreatment report is created during the intake process and is a node in the intake workgroup but its rules and requirements are not included in the intake specification.  The Child Maltreatment Report spec contains detailed business rules about how the child maltreatment report screening behaves while associated with the Intake workgroup.
V4.3 Intake and Child Maltreatment Conversion	M:\Everyone\software specifications	Describes how intake records and child maltreatment records are converted to the V4.3 schema.



# GLOSSARY

Term	Definition
Intake	A business process initiated when the county becomes aware of a new problem or potential need for service. A completed intake is classified according to the intake type and problem category, has a defined next step, and has sufficient recorded information to justify moving to the next step. "Sufficient" information varies by intake type.
Cooperative investigation	Intake type: A request for county assistance in a law enforcement investigation of child maltreatment.
Information request	Intake type: a request for information about a county service or community resource.
Child maltreatment report	Intake type: alleges child abuse or neglect. The alleged victim of a Child Maltreatment Report is age 17 or younger.  This intake type requires the worker to create a separate child maltreatment report record and to record information about the screening decision  Note: SSIS does not currently support documentation of Adult Maltreatment screening detail.
Adult maltreatment report	Intake type: alleges abuse or neglect of a vulnerable adult. This may include self neglect. The alleged victim of an Adult Maltreatment report is at least 18 years old.  Note: SSIS does not currently support documentation of Adult Maltreatment screening detail. When it does, this intake type will require the worker to create a separate adult maltreatment report record.
Problem/Need (Presenting problem)	The problem first identified by the intake contact source. The incident, situation, or need that prompted the agency contact.
Service request	Intake type: An intake category that describes a request for county service or service referral for a problem or need.



# Appendix A: Issues & Design Decisions

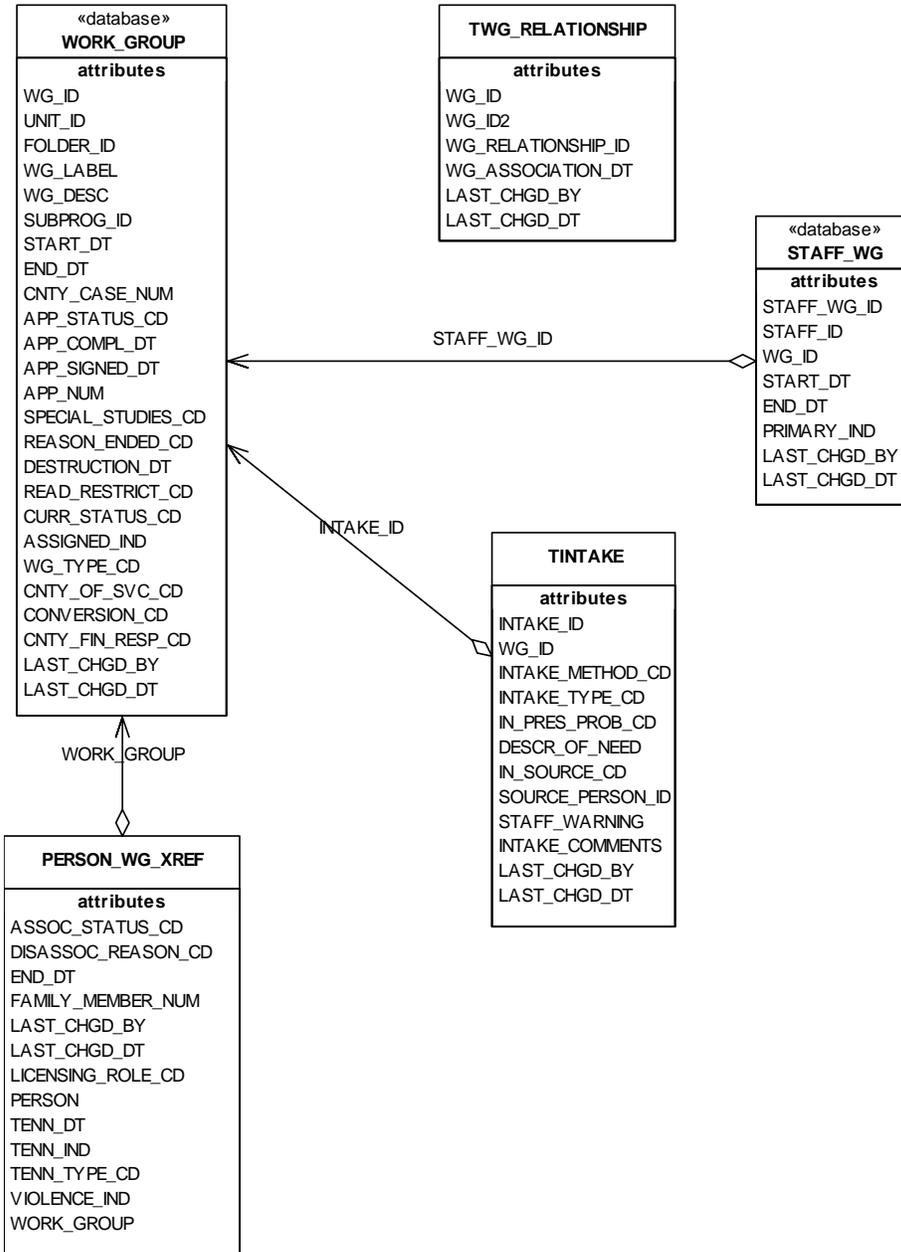
## A.1 Issues

## A.2 Design Decisions

# Appendix B: Class Models

## B.1 Intake Model

The logical model for the Intake module is shown below.



# Appendix C: Data Structure

## C.1 Table Changes for V4.3

### C. 1.1 Eliminated Tables

Table	Reason Eliminated
INTAKE_PARTICIPANT (1605)	No longer needed. All INTAKE_PARTICIPANT records converted to PERSON_WG_XREF records
INTAKE_SNAPSHOT (1630)	No longer used for new intakes. This table is a cross reference between the intake record and the actual snapshot report record. Current snapshot reports remain in the database and will appear under V4.3 intakes in the chronology. The conversion process attaches existing snapshot reports to the appropriate intake workgroup.

### C.1.2 Changed Tables

This section describes only the V4.3 changes to each table and does not list or describe each table field in detail.

**Table: INTAKE (1600)**

V4.2	V4.3																																				
<table border="1"> <thead> <tr> <th>TINTAKE</th> </tr> </thead> <tbody> <tr> <td><b>attributes</b></td> </tr> <tr> <td>+ INTAKE_ID</td> </tr> <tr> <td>+ WG_ID</td> </tr> <tr> <td>+ INTAKE_METHOD_CD</td> </tr> <tr> <td>+ INTAKE_TYPE_CD</td> </tr> <tr> <td>+ IN_PRES_PROB_CD</td> </tr> <tr> <td>+ DESCR_OF_NEED</td> </tr> <tr> <td>+ IN_SOURCE_CD</td> </tr> <tr> <td>+ SOURCE_PERSON_ID</td> </tr> <tr> <td>+ DISPOSITION_DT</td> </tr> <tr> <td>+ STAFF_WARNING</td> </tr> <tr> <td>+ DISP_COMMENTS</td> </tr> <tr> <td>+ FINALIZE_DT</td> </tr> <tr> <td>+ INTAKE_DISP_CD</td> </tr> <tr> <td>+ INTAKE_DT</td> </tr> <tr> <td>+ INTAKE_STATUS_CD</td> </tr> <tr> <td>+ IN_SOURCE_TYPE_CD</td> </tr> <tr> <td>+ SUBPROG_ID</td> </tr> <tr> <td>+ TRACK_CD</td> </tr> <tr> <td>+ LAST_CHGD_DT</td> </tr> <tr> <td>+ LAST_CHGD_BY</td> </tr> </tbody> </table>	TINTAKE	<b>attributes</b>	+ INTAKE_ID	+ WG_ID	+ INTAKE_METHOD_CD	+ INTAKE_TYPE_CD	+ IN_PRES_PROB_CD	+ DESCR_OF_NEED	+ IN_SOURCE_CD	+ SOURCE_PERSON_ID	+ DISPOSITION_DT	+ STAFF_WARNING	+ DISP_COMMENTS	+ FINALIZE_DT	+ INTAKE_DISP_CD	+ INTAKE_DT	+ INTAKE_STATUS_CD	+ IN_SOURCE_TYPE_CD	+ SUBPROG_ID	+ TRACK_CD	+ LAST_CHGD_DT	+ LAST_CHGD_BY	<table border="1"> <thead> <tr> <th>TINTAKE</th> </tr> </thead> <tbody> <tr> <td><b>attributes</b></td> </tr> <tr> <td>INTAKE_ID</td> </tr> <tr> <td>WG_ID</td> </tr> <tr> <td>INTAKE_METHOD_CD</td> </tr> <tr> <td>INTAKE_TYPE_CD</td> </tr> <tr> <td>IN_PRES_PROB_CD</td> </tr> <tr> <td>DESCR_OF_NEED</td> </tr> <tr> <td>IN_SOURCE_CD</td> </tr> <tr> <td>SOURCE_PERSON_ID</td> </tr> <tr> <td>STAFF_WARNING</td> </tr> <tr> <td>INTAKE_COMMENTS</td> </tr> <tr> <td>LAST_CHGD_BY</td> </tr> <tr> <td>LAST_CHGD_DT</td> </tr> </tbody> </table>	TINTAKE	<b>attributes</b>	INTAKE_ID	WG_ID	INTAKE_METHOD_CD	INTAKE_TYPE_CD	IN_PRES_PROB_CD	DESCR_OF_NEED	IN_SOURCE_CD	SOURCE_PERSON_ID	STAFF_WARNING	INTAKE_COMMENTS	LAST_CHGD_BY	LAST_CHGD_DT
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SOURCE_PERSON_ID																																					
STAFF_WARNING																																					
INTAKE_COMMENTS																																					
LAST_CHGD_BY																																					
LAST_CHGD_DT																																					

Eliminated Field	Comments
INTAKE_DT	Data converted to WORK_GROUP.START_DT
STAFF_ID	Not needed; it was used to identify the most recent intake worker, data already exists on STAFF_WG_XREF.
SUBPROG_ID	Not needed; data already exists on WORK_GROUP.SUBPROG_ID. It has always matched the INTAKE_SUBPROG
INTAKE_DISP_CD	Current values converted to appropriate new WORK_GROUP.REASON_ENDED_CD values
DISPOSITION_DT	Converted to WORK_GROUP.END_DT
IN_SOURCE_TYPE_CD	No longer used--existing data is converted to INTAKE_SOURCE_CD.
INTAKE_STATUS_CD	Current values converted to appropriate WORK_GROUP.STATUS_CD

	values
TRACK_CD	Not needed on intake: it was used only for intake type of Child Maltreatment report to identify the track at the time of intake disposition. Values converted to Child Maltreatment report tables as needed.
FINALIZE_DT	Not needed on intake. Record is not editable after 30 days from intake WG close.

**Table: WORK\_GROUP (400)**

V4.2	V4.3
<b>TWORK_GROUP</b>	«database» <b>WORK_GROUP</b>
<b>attributes</b>	<b>attributes</b>
+ WVG_ID + UNIT_ID + FOLDER_ID + WVG_LABEL + SUBPROG_ID + START_DT + END_DT + CNTY_CASE_NUM + APP_STATUS_CD + APP_COMPL_DT + APP_SIGNED_DT + APP_NUM + SPECIAL_STUDIES_CD + REASON_ENDED_CD + DESTRUCTION_DT + READ_RESTRICT_CD + CURR_STATUS_CD + ASSIGNED_IND + WVG_TYPE_CD + CNTY_OF_SVC_CD + CONVERSION_CD + CNTY_FIN_RESP_CD + TRACK_CD + LAST_CHGD_BY + LAST_CHGD_DT	WVG_ID UNIT_ID FOLDER_ID WVG_LABEL WVG_DESC SUBPROG_ID START_DT END_DT CNTY_CASE_NUM APP_STATUS_CD APP_COMPL_DT APP_SIGNED_DT APP_NUM SPECIAL_STUDIES_CD REASON_ENDED_CD DESTRUCTION_DT READ_RESTRICT_CD CURR_STATUS_CD ASSIGNED_IND WVG_TYPE_CD CNTY_OF_SVC_CD CONVERSION_CD CNTY_FIN_RESP_CD LAST_CHGD_BY LAST_CHGD_DT

Eliminated Field	Comments
TRACK_CD	Not needed on workgroup. It is now associated with the Child Maltreatment report.

**Table: WG\_RELATIONSHIP (425)**

V4.2	V4.3
<b>TWG_RELATIONSHIP</b>	<b>TWG_RELATIONSHIP</b>
<b>attributes</b>	<b>attributes</b>
+ WVG_RELATIONSHIP_ID + WVG_ID + WVG_ID2 + LAST_CHGD_BY + LAST_CHGD_DT	WVG_ID WVG_ID2 WVG_RELATIONSHIP_ID WVG_ASSOCIATION_DT LAST_CHGD_BY LAST_CHGD_DT

New Field	Comments
WVG_ASSOCIATION_DT	New field to indicate date of association.

## C.2 Codes

**Table:** WORKGROUP (400)

**Field:** CURR\_STATUS\_CD

**Screen:** Workgroup (tab)

**Field label:** Status

**Replaced code set:** INTAKE\_STATUS\_CD (all values set to inactive in V4.3)

Note: This field already exists in V4.2 but will be used in V4.3 to replace Intake status codes via conversion

Code	Description	Active	Sort
1	Open	Y	N/A
2	Closed	Y	

**Table:** INTAKE (1600)

**Field:** INTAKE\_METHOD\_CD

**Screen:** Intake (tab)

**Field label:** Method

**Replaced code set:** N/A (No change in V4.3)

Code	Description	Active	Sort
1	Document	Y	1
2	Email	Y	2
3	Fax	Y	4
4	Internal referral	N	
5	Phone	Y	5
6	Walk-in	Y	6
7	External referral	N	
8	Legacy	N	
9	Face to face	Y	3

**Table:** INTAKE (1600)

**Field:** INTAKE\_TYPE\_CD

**Screen:** Intake (tab)

**Field label:** Type

**Replaced code set:** N/A (No change in V4.3)

Code	Description	Active	Sort
1	Maltreatment report	N	
2	Information and referral	Y	5
3	Service request	Y	7
4	Child maltreatment report	Y	3
5	Child maltreatment cooperative investigation	Y	2
6	Adult maltreatment report	Y	1
7	CP case management transfer	Y	4
8	Licensing related	Y	6

**Table:** INTAKE (1600)

**Field:** INTAKE.IN\_PRES\_PROB\_CD

**Screen:** Intake (tab)

**Field label:** Problem

**Replaced code set:** N/A (No change in V4.3)

Code	Description	Active	Sort
01	Income	Y	14
02	Employment/training	Y	10
03	Housing	Y	13
04	Transportation	Y	25
05	School	Y	24
06	Health/self care	Y	12
07	Minor parent	Y	17
08	Parenting/family interaction	Y	19
09	Custody dispute	Y	7
10	Crime/delinquency/status offenses	Y	6
11	Interpersonal/personal adjustment	Y	15
12	Mental health	Y	16
13	Developmental disability	Y	8
14	Chemical abuse/dependency	Y	5
15	Alleged child maltreatment	Y	2
16	Alleged vulnerable adult at risk/maltreatment	Y	4
17	Outside evaluation request	Y	26
18	Resource list request	Y	23
21	Request for child care licensure	Y	21
22	Request for child foster care licensure	Y	22
23	Request for adult foster care licensure	Y	20
24	Adoptive home study	Y	1
25	Alleged license violation	Y	3
26	Domestic violence	Y	9
27	Guardianship/conservator request	Y	11
98	Other	Y	18

**Table:** WORK\_GROUP (400)

**Field:** WORK\_GROUP.REASON\_ENDED\_CD

**Screen:** Intake (tab) and Workgroup (tab)

**Field label:** Close reason

**Replaced code set:** INTAKE\_DISP\_CD (all values set to inactive in V4.3)

Note: WORK\_GROUP.REASON\_ENDED\_CD 18 (Resolved in intake) is set to inactive in V4.3.

The list is filtered to allow choices appropriate to ending an Intake Workgroup. The codes marked "Y" in the Intake column below, identify which close reasons are available for intake workgroups.

The codes marked Intake "N" already exist in the V4.2 code set. The ones marked "Y" in the Intake column are new code values for V4.3

Code	Description	Active	Intake	Sort
01	Agency decision - client ineligible for requested services	Y	N	1
02	Agency decision - client need for service not established	Y	N	2
03	Agency discontinued - additional services not available	Y	N	3
04	Agency discontinued - client non-cooperation	Y	N	4
05	Agency discontinued - court order a factor	Y	N	5
06	Client deceased	Y	N	9
07	Client discontinued/refused service, no authority to continue	Y	N	10
08	Client entered hospital/nursing home	Y	N	11
09	Client incarcerated	Y	N	12
10	Client moved	Y	N	13
11	Client reached age of majority/emancipation	Y	N	14
12	Client transferred to another county	Y	N	15
13	Services completed, no further service necessary	Y	N	25

Code	Description	Active	Intake	Sort
14	Services completed, referred elsewhere for further advice	Y	N	26
15	Unable to locate client	Y	N	27
16	Assessment completed, no further action	Y	N	6
17	Assessment completed, open case management	Y	N	7
18	Resolved in intake	N	N	
19	Assessment completed, services being provided	Y	N	8
20	Open for assessment - Intake complete	Y	Y	18
21	Refer to current workgroup - Intake complete	Y	Y	21
22	Open for case management - Intake complete	Y	Y	19
23	Doesn't qualify	Y	Y	16
24	Other agency responsible	Y	Y	20
25	Resource not available	Y	Y	23
26	Request withdrawn	Y	Y	22
27	No further action needed	Y	Y	17
28	Screened out maltreatment report	Y	Y	24

**Table:** INTAKE (1600)

**Field:** INTAKE.IN\_SOURCE\_CD

**Screen:** Intake (tab)

**Field label:** Source

**Replaced code set:** N/A (some existing codes are set to inactive in V4.3 & some new active and inactive ones added).

Note: The existing intake source code list is revised to:

- Be a generic list appropriate for all intakes.
- Contain choices at about the same level of granularity.

Existing code values that will not be used in V4.3 are set to inactive. The inactive codes that are not related specifically to maltreatment are typically covered by a new code at a different level of granularity. A separate list of reporter detail codes is used by Child maltreatment report and is documented in the Child Maltreatment Report specification.

Code	Description	Active	Sort	Comment
01	Alleged victim	N		Legacy
02	Alleged offender	N		Legacy
03	Parent in home	N		Legacy
04	Other relative in home	N		Legacy
05	Parent out of home	N		Legacy
06	Other relative out of home	N		Legacy
07	Friend/acquaintance/neighbor	Y	16	Current code (V4.2)
08	Babysitter	N		Legacy
09	Child care provider	Y	4	Current code (V4.2)
10	Foster parent	Y	15	Current code (V4.2)
11	Facility staff	N		Legacy
12	Teacher	N		Legacy
13	School nurse	N		Legacy
14	Other school personnel	N		Legacy
15	Private physician	N		Legacy

16	Hospital/clinic	N		Legacy
17	Public health nurse	Y	27	Current code (V4.2)
18	Mental health practitioner	Y	22	Current code (V4.2)
19	Chemical dependency practitioner	Y	3	Current code (V4.2)
20	Other health practitioner	N		Legacy
21	Coroner/medical examiner	Y	7	Current code (V4.2)
22	Law enforcement	Y	19	Current code (V4.2)
23	Court/court services	Y	11	Current code (V4.2)
24	Human/social services staff (county or other)	N		Legacy
25	Clergy	Y	5	Current code (V4.2)
29	Anonymous	Y	1	Current code (V4.2)
30	DHS birth match	N		Legacy
31	Attorney	Y	2	New in V4.3
32	Community agency	Y	6	New in V4.3
33	Corrections	Y	8	New in V4.3
34	County income maintenance	Y	9	New in V4.3
35	County social services	Y	10	New in V4.3
36	Day program	Y	12	New in V4.3
37	Education/school	Y	13	New in V4.3
38	Family/relative	Y	14	New in V4.3
39	Guardian/Guardian ad litem	Y	17	New in V4.3
40	Landlord/property manager	Y	18	New in V4.3
41	Medical/dental	Y	20	New in V4.3
42	Mental health center	Y	21	New in V4.3
43	Other professional	Y	23	New in V4.3
44	Parent	Y	24	New in V4.3
45	Personal care provider	Y	25	New in V4.3
46	Private agency	Y	26	New in V4.3
47	Residential facility	Y	28	New in V4.3
48	Self	Y	29	New in V4.3
49	Social worker	Y	30	New in V4.3
50	Veterans services	Y	31	New in V4.3
51	Internal referral	N		New from IN_SOURCE_TYPE_CD *
52	Mandated reporter	N		New from IN_SOURCE_TYPE_CD *
53	Other	N		New from IN_SOURCE_TYPE_CD *
54	Professional referral	N		New from IN_SOURCE_TYPE_CD *
55	Voluntary reporter	N		New from IN_SOURCE_TYPE_CD *
88	Other mandated	N		Legacy
89	Other non-mandated	N		Legacy

\* This code is currently a high level IN\_SOURCE\_TYPE\_CD that will no longer be used in intake redesign. For conversion of existing data, a new IN\_SOURCE\_CD is created for each exist IN\_SOURCE\_TYPE\_CD. The new IN\_SOURCE\_CD is set to inactive because it is used for conversion only. See the Intake and Child Maltreatment Conversion document for additional details.

## Appendix D: Impacted Modules

The items checked below indicate anticipated impacts of this project on SSIS applications or the SSIS Worker application modules. The specifics of an impact are described in the corresponding software specification.

### SSIS applications impacted:

- Administration (incl. Security)
- Fiscal (CSIS)
- Push/Pull
- Repository
- Charting/Analysis

### SSIS Worker modules impacted:

- Adoption
- Alerts & Reminders
- Case/ Workgroup
- Caseload List
- Checklists
- Conclude Service/Missing Data
- County Preferences
- Court
- Documents, Case Notes & Chronology
- Eligibility
- Help
- Intake
- Interfaces
- Licensing
- Maintenance (OOPS/Reset Errors)
- Maltreatment
- Person (Client/Collateral) Entry/Clearing
- Person Search
- Placement
- Programs & Services
- Provider Entry
- Provider Search
- Purge
- Reports
- Security
- SELF (Adolescent Living Skills)
- Service Agreement
- Service Plans
- Staff Activity/Time Reporting
- Staff Assignment
- Standards/ General/Global
- SWNDX/SMI
- View Missing Data

### Additional SSIS Worker impact:

- SSIS Database Changes Needed
- Conversion Issues
- Data Interchange Required
- New Screens/Visual Modules
- Changes to Screens/Visual Modules
  - Changes to Business Rules
- Changes to Existing Reports

The items checked below indicate anticipated impacts of this project on SSIS system interfaces. The specifics are described in the corresponding software specification.

SSIS Worker Interfaces

- Push/Pull
- Client
- Workgroup
- Workgroup Members
- Placement
- Placement Occurrence
- Service Agreement
- Staff Activity
- Repository
- SMI
- xSWNDX **Viewing state wide maltreatment reports**
- Title IV-E eligibility
- Title IV-E reimbursibility
- Licensing

SSIS Worker Reports

- AFCARS
- NCANDS

SSIS Fiscal Interfaces

- MN-ITS/MMIS claiming
- MN-ITS/MMIS eligibility
- Payment requests to county accounting system
- Vendor interface to county accounting system

SSIS State reporting

- CSR
- SEAGR
- Title IV-E Claiming
- TCM/FP CSR
- CMHRS

## Appendix E: SSIS Admin Changes

There are no SSIS Admin Changes for the V4.3 Intake.



End of Intake Specification