Module 8 Chapter 2
Intake Search

Overview

Intake Search allows you to enter new Intake workgroups and helps you locate Intake workgroups.

Intake Search has several functions:

- Entering new Intake workgroups
- Searching for existing Intake workgroups
- Editing information in open Intake workgroups.

Intake

First, let's review the meaning of Intake. Intake is the *first* stage in the child welfare services process – it is the *first* contact regarding the family. It includes receiving the maltreatment report, requests for services or information and gathering relevant information. Intake workgroups allow the user to document these incoming requests for information, services, or maltreatment reports.

Intake Search

Let's take a closer look at each Intake search function.

Intake Search allows you to enter new Intake workgroups. You will learn to enter a new Intake workgroup in classroom training.

Intake Search allows you to search for existing Intake workgroups in either Open or Closed status. An Intake search tells whether an Intake workgroup has been created and what actions have been taken, if any. Plus, you can view any past Intake workgroups for client and families working with the agency.

Intake Search allows edits to be made to Intake workgroups in Open status.

An Intake workgroup in Closed status means that a disposition or decision has been made as to what action, if any, the agency will take. An Intake workgroup in Closed status does not allow further edits and cannot be re-opened without specific security rights.

Access

Intake Search is accessed in one of three ways:

- From the Windows toolbar under Searches/Logs
- From the Application toolbar
- From the Task Panel.

Search Options

There are a variety of Intake search options. Depending on your role and the information you need to locate, you may use only one or two of the available options. We're going to look at all options so you can locate the best one for your work.

When first accessed, Intake Search defaults to Intake Views. From the Tree View, two other options are available: Intake Searches and Intake Maltreatment Report Searches. Each of these nodes has sub-menus allowing you to further define your search options.

Intake Views Node

Intake Views has four search options, which can be accessed either by using the tabs or the Tree View.

My Recent Intakes

My Recent Intakes displays Intake workgroups you have entered. The maximum search timeframe is the previous 1000 days.

If your role includes recording intakes, this screen will allow you to enter new Intake workgroups, edit and view them.

Search results are adjusted to different timeframes using the Include days field. You can adjust the timeframe by using the arrows or by manually changing the number of days, up to 1000. (Intake workgroups older than 1000 days must be searched for in a different manner, shown later.) When the number has been adjusted, click the Search button to view new Search Results.

The search results display in a grid. Each grid has functions to enhance the way you can view results.

The first function of the grid is sorting columns. Each column header can be sorted to view information in a particular order. For instance, the Workgroup Name can be sorted alphabetically or the Start Date / Time column can be sorted by date received. To sort a column, click on the column header.

Intakes Needing Action

The Intakes Needing Action search is used to ensure all Intake workgroups receive a timely response. This search includes workgroups entered by all users.

Results for Intakes Needing Action can include both closed and open Intake workgroups. To view Open Intake Workgroups, the Include open intakes field must be marked Yes.

Any Intake workgroup in Open status is considered an Intake Needing Action, simply because it has not been closed. It is important to close Intake workgroups in a timely manner to ensure that all necessary work is completed within required time frames. For instance, an Intake workgroup with an attached Child Maltreatment Report requires a 24 hour disposition. This means that the close date/time needs to be no later than 24 hours after the start date/time.

An Intake workgroup with a Closed status is considered an Intake Needing Action under specific circumstances.

An Intake workgroup with a Closed status is considered an Intake Needing Action when any of these circumstances apply:

- A Close reason of *Open for Assessment* was entered on the Intake workgroup AND the Assessment workgroup has not been opened; or
- A Close reason of *Open for Case Management* was entered on the Intake workgroup AND the Case Management workgroup has not been opened; or
- A Close reason of *Refer to current workgroup* was entered on the Intake workgroup AND the Intake workgroup has not been referred.

A closed Intake workgroup needing action displays a red icon instead of the standard blue icon; this visual cue conveys that an action needs to be taken.

All Recent Intakes

The search All Recent Intakes locates Intakes that *all* users have entered. Again, the maximum search timeframe is the previous 1000 days.

Recent Intake Participants

The final search option under Intake Views is Recent Intake Participants search. This option searches for participants in an Intake workgroup, including clients and collaterals entered.

As an example, this search can be used when another intake worker or supervisor must follow up, and has only limited information.

Again, the maximum search timeframe is the previous 1000 days.

Intake Searches Node

Let's go back to the Tree View and explore the next search node, Intake Searches. From Intake Searches there are three options:

- Intake Main Search
- Intake Person Search
- Unassigned Intake Searches.

These searches allow you to access more search criteria, making it easier to locate specific Intake workgroups.

Intake Main Search

Intake Main Search is used to locate any type of Intake workgroup. This option has a number of fields used to narrow search results and locate a specific Intake workgroup or specific types of Intake workgroups, such as an Intake workgroup in the Program Area of Adult Services. For instance, to locate an Intake workgroup that another worker took yesterday, adjust the date range to Yesterday and enter his or her name in the Worker field.

Further, if you know the program area or intake type, enter that information to conduct a more specific search.

Intake Person Search

Intake Person Search is used to locate clients or collaterals included in an Intake workgroup.

The search uses a Starts With search mechanism; so if the complete name of the participant is not known, a partial first or last name can be entered.

Unassigned Intake Search

The Unassigned Intake Search is used to locate Intake workgroups that do not have an assigned worker. This can happen when a worker's assignment to an Intake workgroup has ended, and the workgroup has not yet been reassigned to another worker. This search ensures that Intake workgroups are always assigned to a worker and are not overlooked.

The search criteria used in this search is similar to the Intake Main Search.

This search is important for Adult Protection Intake workgroups transferred electronically from another county.

Intake Maltreatment Report Searches Node

The next node is the Intake Maltreatment Report Searches node, including:

- Adult Maltreatment Main Search
- Child Maltreatment Main Search
- Child Maltreatment Victim/Offender Search.

Adult Maltreatment Main Search

Adult Maltreatment Main Search searches only for Intake workgroups that have an Adult Maltreatment Report attached.

Search criteria in the right column represent fields specific to the Adult Maltreatment Report, including the Report status and Imminent danger field.

Child Maltreatment Main Search

Child Maltreatment Main Search searches only for Intake workgroups that have a Child Maltreatment Report attached. Search criteria in the right column represent fields specific to the Child Maltreatment Report.

For example, this search can be used to:

- Search by track (Family Assessment or Family Investigation) and Report status to see how many Intake workgroups are accepted during a certain timeframe
- Search for trends (such as Investigation reason).

The Child Maltreatment Victim/Offender Search

The Child Maltreatment Victim/Offender Search searches for clients entered as either an alleged victim or alleged offender within a Child Maltreatment Report of an Intake workgroup. This search has no date range option, so it will search all Intake workgroups.

The Description field is used when a description was entered for the alleged victim or offender in the allegation. Examples of a description could include “Child age 3” or “Adult relative – identity unknown at intake.” Only a partial description is necessary to search using the Description field.

Action Menu Intake Search Functions

There are several options available on the Intake Searches Action menu. Options change depending upon the search and whether anything is highlighted in the grid. Your security settings and the Intake workgroup's assigned security setting may impact what is available for you to select on the Action menu.

New Intake Workgroup allows a user to create a New Intake workgroup. This option is available from most search options.

Search allows you to generate new search results in the grid when the search criteria is changed. This is an alternative option to clicking the Search button on the search screen.

Additional Action menu options are available only when an open Intake workgroup is highlighted in the grid. The next screens provide more detail.

New Primary Worker allows you to add a new primary worker, but only when there is no existing primary worker.

New Secondary Worker allows you to add a new secondary worker. Multiple secondary workers can be added to an Intake workgroup; there is no limit.

New Adult Maltreatment Report allows you to add an Adult Maltreatment Report to an existing open Intake workgroup, required when a report of vulnerable adult maltreatment is received. (This is also referred to in the field as a vulnerable adult Common Entry Point, or CEP, report.)

New Child Maltreatment Report allows you to add a Child Maltreatment Report to an existing open Intake workgroup, as required when a report of child maltreatment is received.

Open in New Window allows you to open the highlighted Intake workgroup in a new window. A new screen opens and only the selected intake is viewable. This helps avoid confusion when entering and editing existing Intake workgroups.

Save is enabled when the highlighted Intake workgroup is not saved. When Save is grayed out, the current highlighted workgroup has already been saved.

Cancel allows you to cancel the last changes made to an open Intake workgroup, but only if it hasn't already been saved.

Delete allows you to delete an Intake workgroup that has been opened in error. This is only done when the Intake workgroup was created by mistake; you must have "delete workgroup function" in your user security setting, and the Intake workgroup must be incomplete.

Copy Intake and Adult Maltreatment Report is available on both open and closed Intake workgroups that have an attached Adult Maltreatment Report. This option creates a duplicate of the Intake workgroup and Adult Maltreatment Report selected in the grid. This enables a worker to use the same Adult Maltreatment Report when there are multiple victims identified in the same report.

> The Adult Maltreatment Report allows entry of one victim per report, therefore, if there are multiple victims, specifically 4 or under, multiple reports are required. When over 4 victims are identified as part of the report, only one Intake workgroup and Adult Maltreatment Report is required. When using the copy feature, it is important to review all copied information for accuracy. More information on Adult Maltreatment is available on the SSIS training website.

Open Case/Workgroup Setup is enabled on Intake workgroups that require an opening of an Assessment or Case Management workgroup. This means that the Intake workgroup has a disposition of either Open for Assessment or Open for Case Management.

Open With Case in New Window is enabled when an Assessment or Case Management workgroup is highlighted in the Tree View. This is only available when an Assessment or Case Management workgroup has been created from or associated to an Intake workgroup. When the Assessment or Case Management workgroup is highlighted, this option is enabled and a user is able to access only one Case and its Workgroup contents.

Printing is available on both open and closed Intake workgroups. There are multiple printing options including printing the Intake workgroup and its contents, addresses and phone numbers, and person-related information.

Maintenance is available only to users with specific security rights and is used to Re-open Intake workgroups and Transfer a Workgroup to another case.

Associated Workgroups is available only to users with specific security rights, allowing those users to Delete an Assessment or Case Management workgroup and Revert to Intake.

Data Clean-up allows you to view any potential data clean-up errors associated with the Intake workgroup.

Locating Information

There are a few key ways to facilitate locating correct information. You can:

- Narrow or expand your search criteria
- Adjust the timeframe

- Adjust Search Results in the grid.

Intake Search FAQ

I want to find only Intake workgroups that I have entered. What is the easiest way?

> To find Intake workgroups you have entered, use the My Recent Intakes search option and adjust the date accordingly.

I want to create a New Intake Workgroup, but the Action menu doesn’t allow me to select this option.

> When the Action menu does not allow you to create a New Intake Workgroup, try highlighting a different folder in the Tree View. Highlighting My Recent Intakes is the easiest place to create and edit new Intake workgroups.
>
> If this does not work, check with your supervisor or SSIS mentor; you many need to have the Create Intake function added to your security settings.

Can I edit an Intake workgroup in Intake Searches?

> You can edit an Intake workgroup in Intake searches as long as you have security rights and access to the Intake workgroup you want to edit. The Intake workgroup must be in Open status.

Another agency sent an APS intake electronically; I checked Unassigned Intakes but don’t see it.

> When APS intakes are transferred electronically, they do not display immediately on the receiving agency’s Unassigned Intake Searches. These types of transferred intakes display the following day.

I want to find a child maltreatment Intake workgroup – which search is my best option?

> To locate a child maltreatment Intake workgroup, use Child Maltreatment Main Search.

I have located an Intake workgroup, but I can’t see the contents of the report. Why is that?

> If you cannot view the contents of a report, you may not have security access to view Intake workgroups or specific types of Intake workgroups. When you do not have access to information you need to perform your duties, talk with your SSIS coordinator, mentor or supervisor for assistance.

Summary

You may or may not use Intake Searches on a regular basis and it is unlikely you will use all of the options in Intake Searches. But it's important to know how to go about finding Intake information in the system. SSIS provides a variety of search options to assist you in locating Intake information.

Next Steps

From the Attachments tab, print the Intake Search transcript.Handouts are available on the SSIS website. Print handouts that may be useful in your work, or bookmark the page for future reference. A list of these handouts is available from the Attachments tab.

When you are ready, begin Chapter 3: Workgroup Searches.