Online Intake Version 16

TABLE OF CONTENTS

Overview

The Online Intake Version 16 makes use of some of the latest technologies available to provide a smooth, easy online intake for mobile users. Uses across many devices will see a varying version of the online intake that is redesigned visually to appear seamlessly in their browser. Full desktop users will see the expanded version of the website; whereas, mobile users get a reduced version of the website.

Pages within the online intake have been redesigned to allow for clear and logically-grouped question presentation.   Prior versions of the online intake system had seven pages for the applicant to move through. This redesigned system has been reduced to five (5) pages of questions and additional error-checking has been built into forms.

As with the previous version of online intake, data entered by an applicant is stored in a separate, password-protected system to allow your organization to check for conflicts and other requirements before adding the applicant to your regular intake/client system.

Setup

Most setup is already done for you. You may wish to modify the information in the online intake system to fit your organization's desires and needs. For example, the headings for the normal intake and mobile intake pages may be changed to reflect the organizations name:
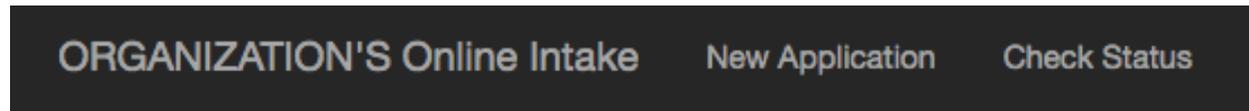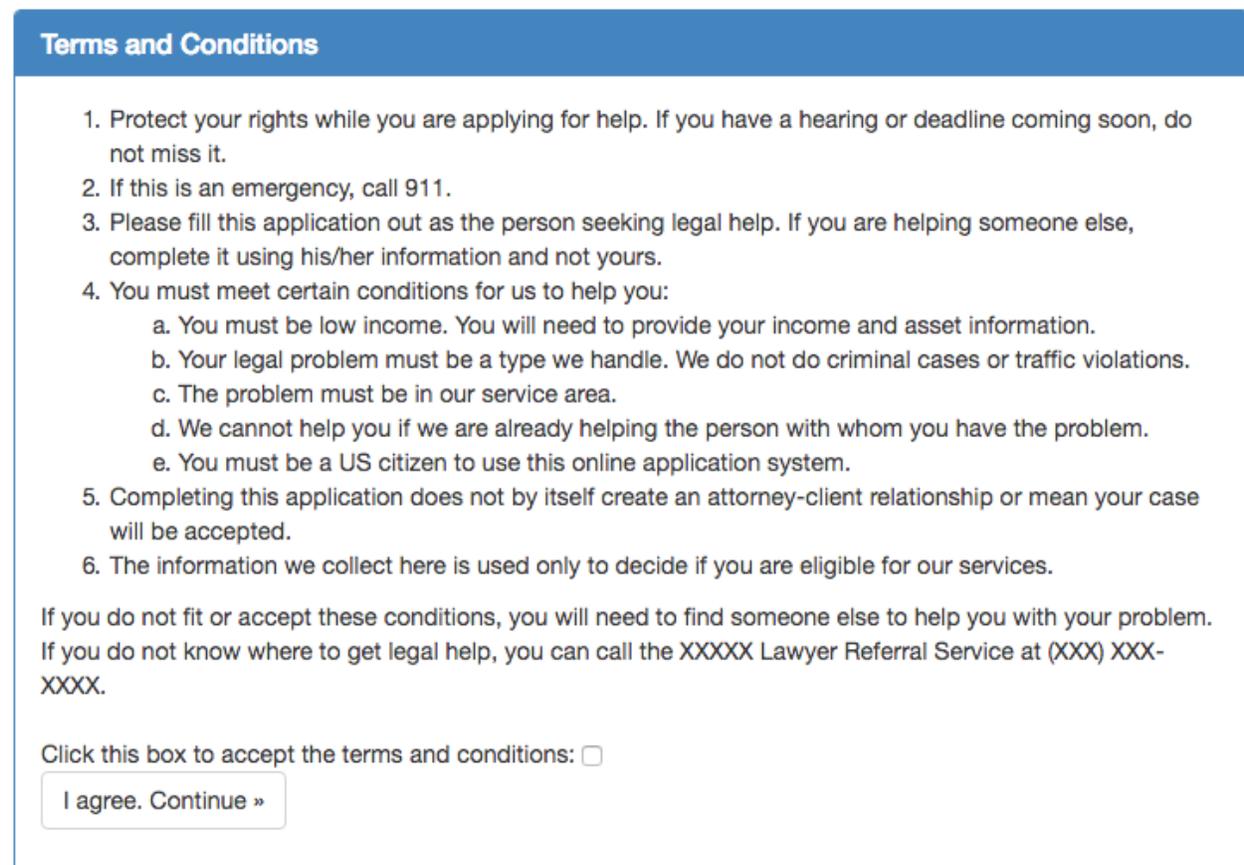

Figure 1 - Example of the normal intake page header

Figure 2 - Example of the mobile intake page header

Your organization will also, undoubtedly, wish to customize the terms and conditions page:

Figure 3 - Terms and Conditions Page

Application Process

From the main page, the applicant may choose to either (1) make a new application, or (2) check the status of an existing application:
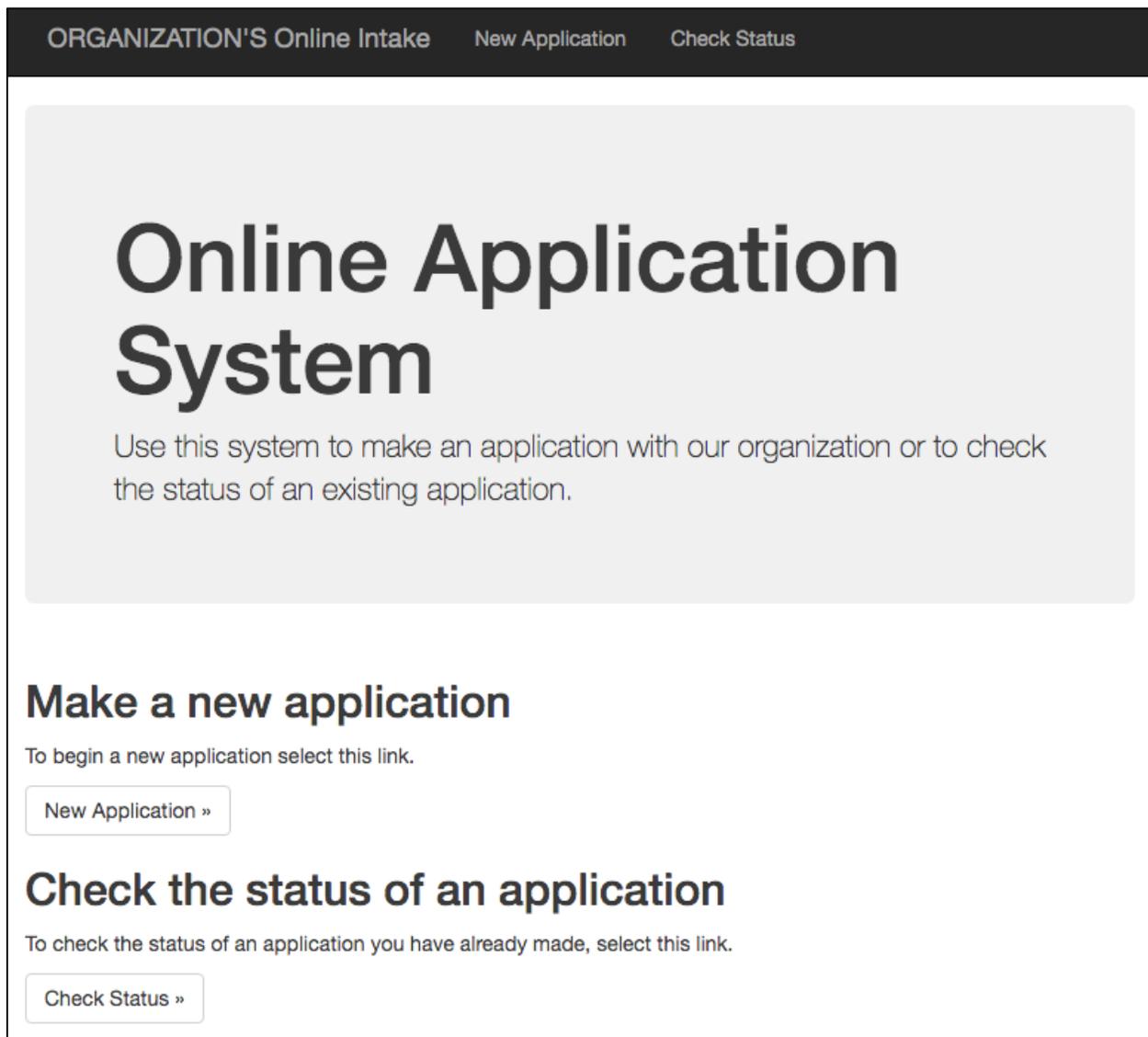

Figure 4 - Main Page

Clicking the "New Application" button takes them to the Terms and Conditions page:

Figure 5 - Terms and Conditions Page

Only after the applicant selects the checkbox, indicating they accept the terms and conditions, will they be allowed to proceed to the application. Pressing the "I agree…" button, without checking the box, results in a reminder that they have to accept the terms:

Figure 6 - "You must agree" warning

The first page of the application is geared toward getting basic information about the person, including their citizenship status and the type of problem they have. If they mark that they aren't a citizen, they won't be allowed to continue on. Additionally, we can verify their problem in the organization's service area. Various questions throughout the application process are required. Failure to enter information in those fields results in error messages next to the required item:

Figure 7 - Page One of the Application

On page two, we get the name(s) of the applicant, contact information and a couple pieces of demographics. Contact information includes a mailing address, telephone numbers, and email address:

Figure 8 – A portion of Page Two of the Application

Remember, the size of the browser the applicant is using determines the layout of the form itself. The portion of the same page two in a smaller screen is shown here:

Figure 9 - Page two example in a smaller screen size

On page three, we get conflict information from the applicant:

Figure 10 – A portion of page three of the application

On page four, we get the information necessary to make an income and asset determination:

Figure 11 - Page Four - Household information

At least one "Income" item must be filled out, even if they set the type to "None" and enter a zero in the amount box. All five asset boxes are required to have some amount entry in them. Like most parts of the system, these pages may be modified to omit various questions.

On the final page, we get a password from the applicant that they can use to log back on to the system to get the status of this application. We also get information about how they came to know about us:

Figure 12 - Page five of the application

Once the application is submitted, the applicant is shown an "Application Received" page, giving them various information about the application, including the application number they will need to log back in to get the status of their application, and the entries they made in the application:

Figure 13 - Application Received page

Staff Portion of Online Screening System

Staff who have the appropriate role assigned to them in Prime, may use the Admin tab to open the Online Intake system:
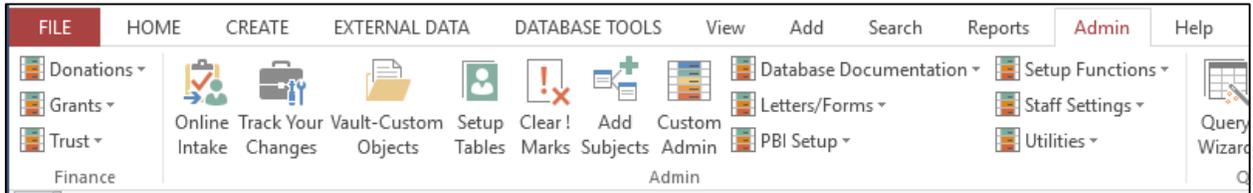
Figure 14 - Top line menu bar showing the "Online Intake" option in the Admin tab

Figure 15 - Online Application Search Screen

Figure 16 - Tab One

Only two tabs, labeled 1 and 4. It seems like something is missing. Maybe the information that would cause a conflict if we see it?

Applicant entered information is in light-blue boxes.

Staff members use dark-blue boxes to interact with the applicant's information.

Use the familiar conflict checking systems to see if there is a conflict.

Let's say a conflict exists. What happens?

The conflict information (in tabs 2, 3, and 5) is deleted from the system to protect against conflicts with that information.

Screenshot 1

PRIME SQL Version 8 C ON - [inpScreeningX]

File Edit View Insert Format Records Tools Window Help   Type a question for help

ScreeningX   Save/Stay Pending Apps Calendar Time Print Close

1. Conflict Check | 4. Proceed or Reject

Applicant #	118	Application Date	5/13/2011 10:35:53 AM
Applicant Name	James	Spencer
Alt. Name:		
Address	777 S Morningside Drive	Safe Address ☑
City	Springfield	State MO Zip 65808
Birth Date	1/1/1960 Gender M ▾ Age 51

Phone 111 111-1111   Phone Txt   Safe Phone ☑
Work Phone   Work Txt   Safe Work ☐
Other Phone   Other Txt   Safe Other ☐
EMail   Safe Email ☑

Using   ! 1000 10:44:46 AM !

Opponent 1:
Oppontent 2

Staff: 1000 ▾   * Check All   * Conflict   * Conflict   * All   * All
Office: 1 ▾ Unit: 0 ▾   Conflicts   Check   Search   People   Phones

* In Order to See Additional Information you Must Certify You Performed a Conflict Check.
If there is a Conflict, confidential Information will be erased and the application marked as rejected.
You still need to contact the Applicant to inform them of the decision!

CXX ▾

CXX	Not Checked
CCN	No Conflict
CCC	Conflict Exists
CNF	Needs Followup

Record: I◀ ◀   1 ▶ ▶I ▶* of 1 (Filtered)
Form View   FLTR   NUM

> What if we say there isn't a conflict?

Screenshot 2

PRIME SQL Version 8 C ON - [inpScreeningX]

File Edit View Insert Format Records Tools Window Help   Type a question for help

ScreeningX   Save/Stay Pending Apps Calendar Time Print Close

1. Conflict Check | 2. Review Issues | 3. Income Details | 4. Proceed or Reject | 5. Comments

Applicant #	118	Application Date	5/13/2011 10:35:53 AM
Applicant Name	James	Spencer
Alt. Name:		
Address	777 S Morningside Drive	Safe Address ☑
City	Springfield	State MO Zip 65808
Birth Date	1/1/1960 Gender M ▾ Age 51

Phone 111 111-1111   Phone Txt   Safe Phone ☑
Work Phone   Work Txt   Safe Work ☐
Other Phone   Other Txt   Safe Other ☐
EMail   Safe Email ☑

Using   ! 1000 10:44:46 AM !

Opponent 1:
Oppontent 2

Staff: 1000 ▾   * Check All   * Conflict   * Conflict   * All   * All
Office: 1 ▾ Unit: 0 ▾   Conflicts   Check   Search   People   Phones

* In Order to See Additional Information you Must Certify You Performed a Conflict Check.
If there is a Conflict, confidential Information will be erased and the application marked as rejected.
You still need to contact the Applicant to inform them of the decision!

CCN ▾

Record: I◀ ◀   1 ▶ ▶I ▶* of 1 (Filtered)
Form View   FLTR   NUM

> We get to see the rest of the information in the application.

13

Their citizenship, problem, problem location, and other information is shown on tab 2.

Household information, income, assets, and expenses is shown on tab 3.

Compute the poverty percentages.

14

Tab 4 is where we decide whether to go on with the application process, require more information, or reject.

The yellow bar gives the applicant status information on the website.

"Application Status Text" allows us to give instructions or other information to the applicant through the website.

15

If the applicant logs back into the system, he would see that information:

Figure 17 - Status Information Screen

Requirements

Prime 14 or Prime 16 is required for the Online Intake Version 16 System. For users hosted within Venture Technologies, all requirements are met and taken care of for you.

For self-hosted users, you must have a system with SQL Server 2012, 2014, or 2016. Your Access version must be version 2013 or 2016. A Microsoft Windows Server 2012 R2 system with web services, and items necessary to run an ASPX forms-based website must be available. The SQL Server and web server must be on the same LAN.