

Online Intake Version 16

TABLE OF CONTENTS

Overview	1
Setup	2
Application Process	3
Staff Portion of Online Screening System	10
Requirements.....	17

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. Users 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:

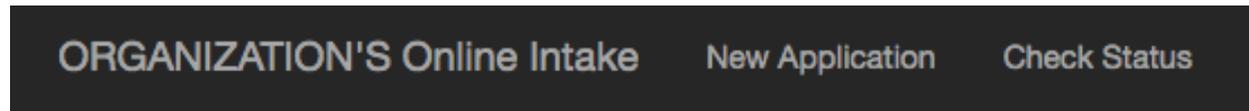
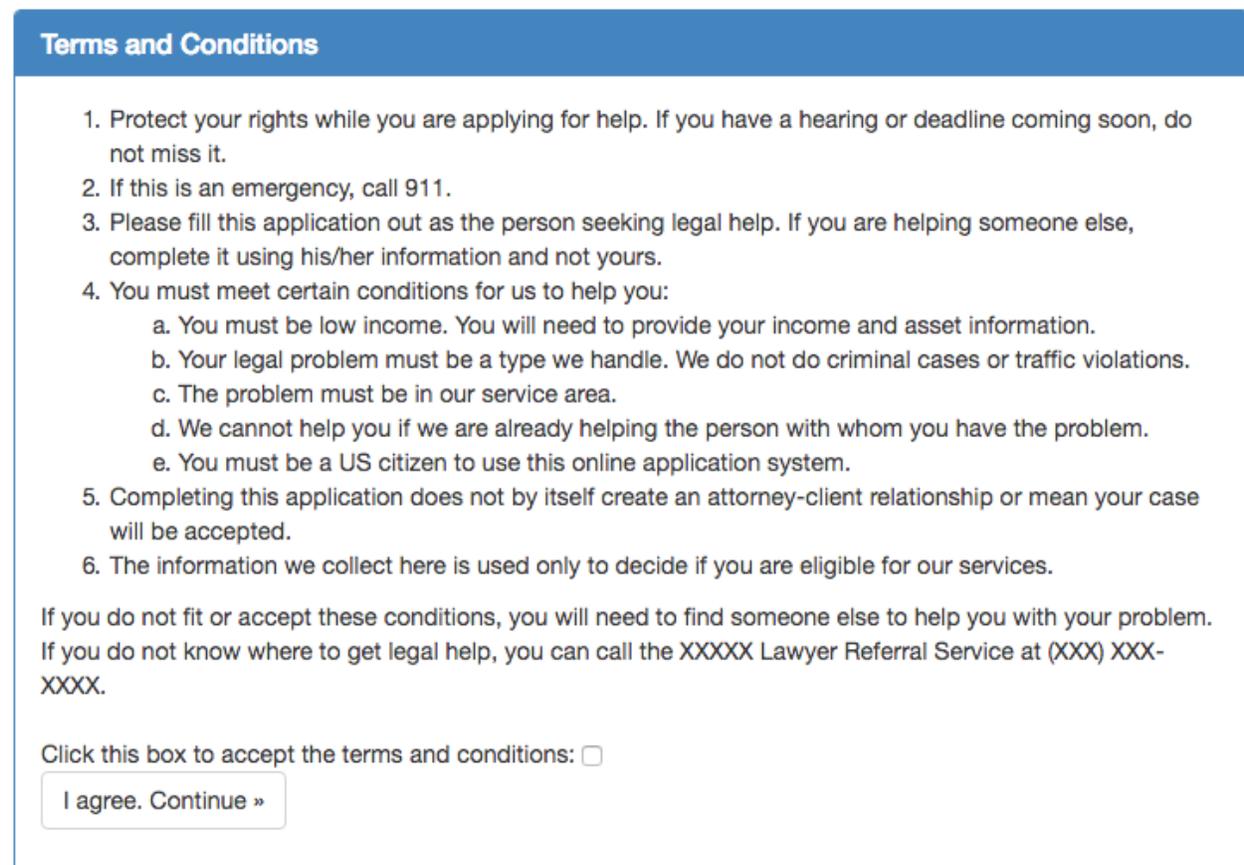


Figure 1 - Example of the normal intake page header



Figure 2 - Example of the mobile intake page header

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



Terms and Conditions

1. Protect your rights while you are applying for help. If you have a hearing or deadline coming soon, do not miss it.
2. If this is an emergency, call 911.
3. Please fill this application out as the person seeking legal help. If you are helping someone else, complete it using his/her information and not yours.
4. You must meet certain conditions for us to help you:
 - a. You must be low income. You will need to provide your income and asset information.
 - b. Your legal problem must be a type we handle. We do not do criminal cases or traffic violations.
 - c. The problem must be in our service area.
 - d. We cannot help you if we are already helping the person with whom you have the problem.
 - e. You must be a US citizen to use this online application system.
5. Completing this application does not by itself create an attorney-client relationship or mean your case will be accepted.
6. The information we collect here is used only to decide if you are eligible for our services.

If you do not fit or accept these conditions, you will need to find someone else to help you with your problem. If you do not know where to get legal help, you can call the XXXXX Lawyer Referral Service at (XXX) XXX-XXXX.

Click this box to accept the terms and conditions:

I agree. Continue »

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:

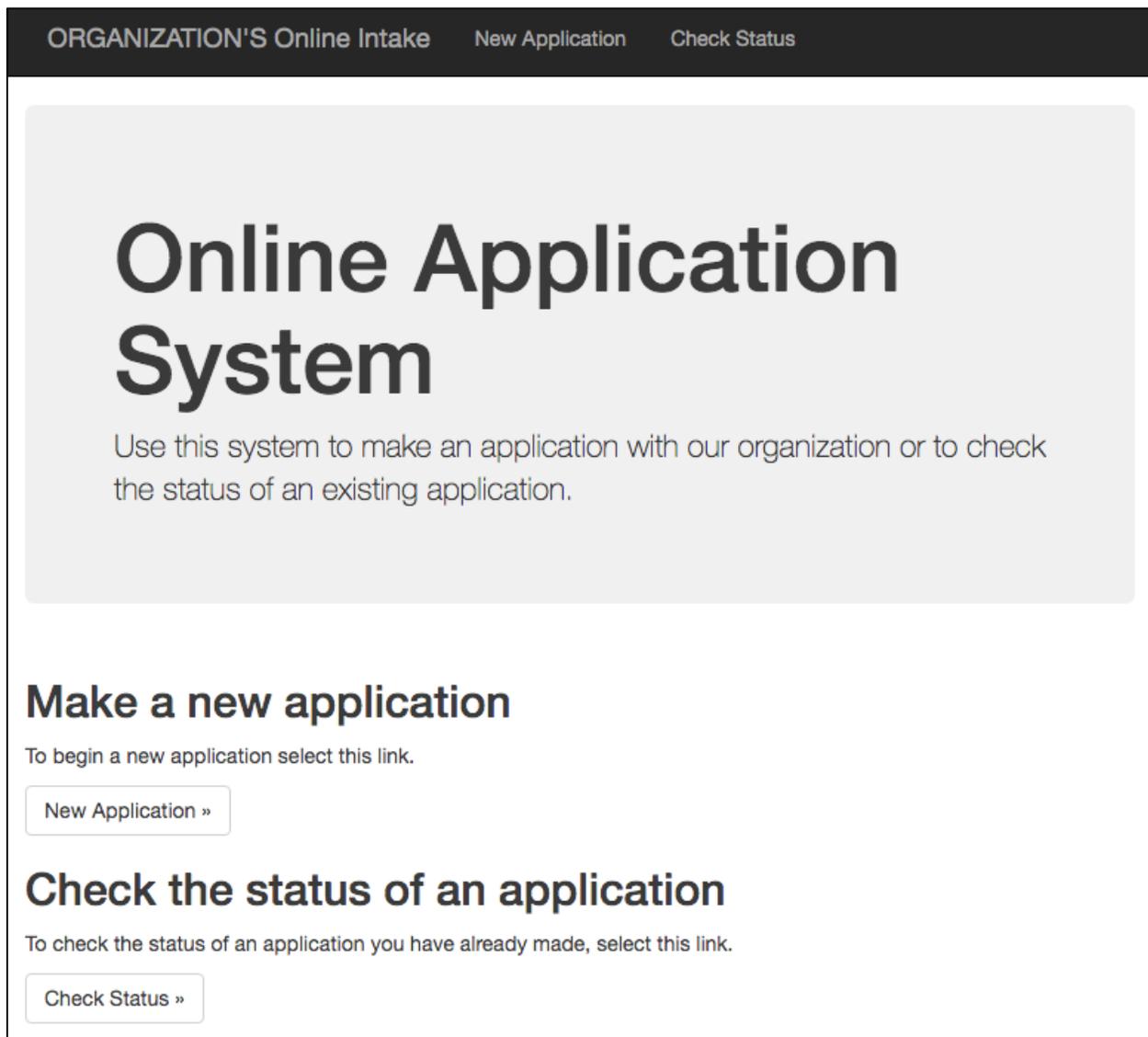


Figure 4 - Main Page

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

Terms and Conditions

1. Protect your rights while you are applying for help. If you have a hearing or deadline coming soon, do not miss it.
2. If this is an emergency, call 911.
3. Please fill this application out as the person seeking legal help. If you are helping someone else, complete it using his/her information and not yours.
4. You must meet certain conditions for us to help you:
 - a. You must be low income. You will need to provide your income and asset information.
 - b. Your legal problem must be a type we handle. We do not do criminal cases or traffic violations.
 - c. The problem must be in our service area.
 - d. We cannot help you if we are already helping the person with whom you have the problem.
 - e. You must be a US citizen to use this online application system.
5. Completing this application does not by itself create an attorney-client relationship or mean your case will be accepted.
6. The information we collect here is used only to decide if you are eligible for our services.

If you do not fit or accept these conditions, you will need to find someone else to help you with your problem. If you do not know where to get legal help, you can call the XXXXX Lawyer Referral Service at (XXX) XXX-XXXX.

Click this box to accept the terms and conditions:

I agree. Continue »

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:

Click this box to accept the terms and conditions: You must agree to the terms and conditions.

I agree. Continue »

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:

Citizenship and Problem

Citizenship

Are you a US citizen?

No

You must be a US citizen to use this online application.

Problem Description

Please select the general subject area that best describes your problem:

--Please Select

Then select the specific legal problem:

--Please Select

You must make a selection.

Tell us more about your problem:

What do you want us to do for you?

Problem Location

County: --Please Select

You must make a selection.

State: --Please Select

You must make a selection.

Continue »

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:

Your Information

Name

First: Middle: Last: Extension:

If you have used another name enter it:

First: Middle: Last: Extension:

Safe contact information

Only include information below where it is safe for us to contact you.

Address:

City: State: Zip:

Safe Phones

Phone numbers where you can safely be reached:

Main Number	Area Code: <input type="text"/>	Phone: <input type="text"/>	Comments: <input type="text"/>
Mobile	Area Code: <input type="text"/>	Phone: <input type="text"/>	Comments: <input type="text"/>
Work	Area Code: <input type="text"/>	Phone: <input type="text"/>	Comments: <input type="text"/>

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:

Your Information

Name

First:

Middle:

Last:

Extension:

If you have used another name enter it:

First:

Middle:

Last:

Extension:

Safe contact information

Only include information below where it is safe for us to contact you.

Address:

City:

State:

Zip:

Figure 9 - Page two example in a smaller screen size

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

Conflict Information

Opposing Parties

If there is someone causing this problem, or someone you might think of as "on the other side", enter that name(s) below. If there is not, leave this blank. If you are having problems with a business or government agency, put the business or agency name in the LAST name field.

First person's or organization's name:

First: Middle: Last: Extension:

[Put business or organization name in last name field]

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:

Household Information

People in Household

Including yourself, how many people live in this household?

Adults: Children:

Financial Information

Monthly Income

Please enter your gross (before taxes) monthly household income below. If you have more than five sources, combine those on the last line. Put in at least one income source. If you do not have any income, select "None" in the income source, and put "0" in the Monthly Amount.

-Please Select	\$	<input type="text"/>
-Please Select	\$	<input type="text"/>
-Please Select	\$	<input type="text"/>
-Please Select	\$	<input type="text"/>
-Please Select	\$	<input type="text"/>

Assets

Please enter the value of your household cash, savings and checking balances.

Cash, savings, checking	\$	<input type="text"/>
Certificates of Deposit	\$	<input type="text"/>
Stocks, Bonds	\$	<input type="text"/>
Mutual Funds	\$	<input type="text"/>
Other	\$	<input type="text"/>

Expenses

We can consider certain monthly expenses to see if you qualify. If you have any of the following expenses, please estimate your monthly payment and enter it below.

MEDICAL	\$	<input type="text"/>
CHILD SUPPORT	\$	<input type="text"/>
SPOUSAL SUPPORT	\$	<input type="text"/>
GOV'T DEBTS	\$	<input type="text"/>
GARNISHMENTS	\$	<input type="text"/>

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:

Final Questions

Log Back In

If you will log back on to check the status of this application, enter a password:

Help Us Out

How did you learn about us?

Do you have suggestions on how to make this application easier?

Is there anything else you would like to tell us about why you should be eligible?

SUBMIT YOUR APPLICATION

Before pressing the SUBMIT button, please make sure all your entries are true and complete.
 Make sure you entered a password if you want to log back on. If you use the BACK button to review your entries, it will clear the password box: you will need to fill it in again.

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:

Application Received

Your application has been successfully submitted. Thank you.

You must contact us at (XXX) XXX-XXXX. Call during the hours of 9 am to 3:30 pm, Monday through Thursday. Tell the person who answers that you have already submitted an online application.
 Please click [here](#) to access written materials that may answer some of your questions.

Here is information about your application:

Your application number: 105
 Use this number if you log back on to check the status of your application.

Name: a b
 Second Name:
 US Citizen: Yes
 Your problem: Custody / Visitation
 Your problem is located in: Clay County, BC

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:

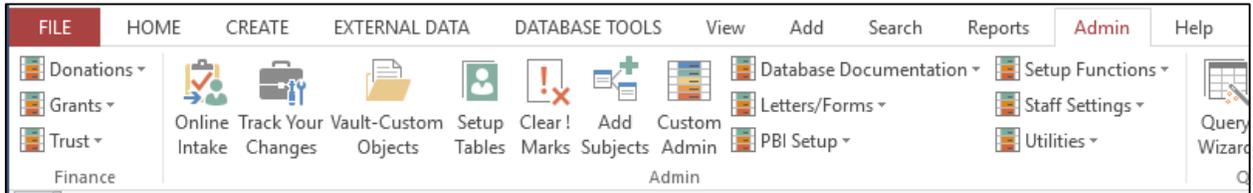


Figure 14 - Top line menu bar showing the "Online Intake" option in the Admin tab

The screenshot shows the 'Screening X' interface in PRIME SQL. The search field is set to 'App Last Name'. There are buttons for 'Open Intake', 'Status', 'Search', 'Show All', and 'Close'. A 'Pending' button is highlighted. Below the search area is a table of applications. Three callout boxes provide instructions:

- See only pending online applications.** (Points to the 'Pending' button)
- Delete old application passwords for safety.** (Points to the 'Password Clean' button)
- Delete trash applications.** (Points to the 'Delete App' button)

The table data is as follows:

Use	ApplicantNum	Pending	AppLname	AppFname	ProbTyt	AppDate	AppC	AppStatus	Unit	Snurr	Office
	45	No	Last	First	32	2/14/2011 4:00:3	No	AWR	0	0	0
	46	No	Last	First	32	2/14/2011 4:16:0	No	AWR	0	0	0
	50	No	test	test	55	2/14/2011 4:19:4	No	AWR	0	0	0
	52	No	test	test	55	2/14/2011 4:20:0	No	AWR	0	0	0
	53	No	test	test	55	2/14/2011 4:20:0	No	AWR	0	0	0
	55	No	zTest	Test		2/14/2011 4:27:4	No	ARJ	0	1000	1
	56	No	test	test	32	2/14/2011 4:38:1	No	AWR	0	0	0
	57		tes	tes	32	2/14/2011 6:13:7	No	AWR	0	0	0
	58		tes	tes	32				0	0	0
	59		tes	tes	32				0	0	0
	60		tes	tes	37				0	0	0
!	61		tes	tes					0	0	0
	62		tes	tes					2	0	0
!	65		tes	tes	22				0	0	0
	67		tes	tes	24				0	0	0
	67	No	test	first	35				0	0	0
	68	No	test	test	32				0	0	0
	69	No	test	test	32				0	0	0
	71	No	MyLast	MyFirst	22				0	0	0
	73	No	test	test	43	3/2/2011 9:44:43	No	AWR	0	0	0
	74	No	test	test	66	3/2/2011 9:46:58	No	AWR	0	0	0
	75	No	test	test	35	3/2/2011 9:52:12	No	AWR	0	0	0
	76	No	test	test	35	3/2/2011 9:52:20	No	AWR	0	0	0
	77	No	test	test	44	3/2/2011 9:55:19	No	AWR	0	0	0
	78	No	test	test	67	3/2/2011 10:04:5	No	AWR	0	0	0
	79	No	test	test	35	3/2/2011 10:06:1	No	AWR	0	0	0
	80	Yes	Thomas	Shalanda	21	3/2/2011 12:04:4	No	APR	0	0	0
	81	No	test	test	35	3/2/2011 1:56:13	No	AWR	0	0	0
	82	No	test	test	43	3/2/2011 1:57:10	No	AWR	0	0	0

Figure 15 - Online Application Search Screen

Figure 16 - Tab One

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

E-Mail Safe Email

Using 1000 10:44:46 AM

Opponent 1

Opponent 2

Staff: 1000

Office: 1 Unit: 0

* Check All Conflicts * Conflict Check * Conflict Search * All People * All 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!

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

Record: 14 of 1 (Filtered)

Form View FLTR NUM

Let's say a conflict exists. What happens?

Found a Conflict

 You have found a Conflict in this case!
If you answer Yes, it will:

- Erase all confidential information.
- Leave the contact information in place.
- Mark the application as rejected because of the conflict.
- You need to tell the Applicant about the rejection.
- Record the contact on the Proceed or Reject Tab.

Do you want to proceed?

Yes No

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

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

E-Mail Safe Email

Using 1000 10:44:46 AM

Opponent 1: Opponent 2:

Staff: 1000 Office: 1 Unit: 0

* Check All Conflicts * Conflict Check * Conflict Search * All People * All 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!

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

Record: 1 of 1 (Filtered)

Form View FLTR NUM

What if we say there isn't a conflict?

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

E-Mail Safe Email

Using 1000 10:44:46 AM

Opponent 1: Opponent 2:

Staff: 1000 Office: 1 Unit: 0

* Check All Conflicts * Conflict Check * Conflict Search * All People * All 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: 1 of 1 (Filtered)

Form View FLTR NUM

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

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 Read the Warnings: Applicant States they are low income:

Citizenship Status: Citizen

Problem Type: Divorce / Sep. / Annul.

Problem Further Description:

Wants This:

Problem Location County: Cherokee State: MO

Gave These Reasons Why We should help:

Learned About Us from: Unknown

Record: 14 of 1 (Filtered)

Form View FLTR NUM

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

Adults: 1 Children: 0

Income Source	Monthly
Income 1: Pension	\$500.00
Income 2: Not chosen	
Income 3: Not chosen	
Income 4: Not chosen	
Income 5: Not chosen	
IncomeT	

Asset	Asset Value
Asset 1: Cash, savings, cd	\$0.00
Asset 2: Certificates of De	\$0.00
Asset 3: Stocks, Bonds	\$0.00
Asset 4: Mutual Funds	\$0.00
Asset 5: Other	\$0.00
AssetT	

Monthly Exp.	Expense \$
Expense 1: MEDICAL	
Expense 2: CHILD SUPPOR	
Expense 3: SPOUSAL SUPP	
Expense 4: GOVT DEBTS	
Expense 5: GARNISHMENTE	
ExpenseT	

* Compute % *Recalc Form *Calculator

* Percent of Poverty:

* Net Percent of Poverty (minus expenses):

Record: 14 of 1 (Filtered)

Form View FLTR NUM

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

Compute the poverty percentages.

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.

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 Chosen Password 1234

Applicant Wants Us to Contact Them Using:
 Phone Work Phone Other/Cell Phone EMail Mail

Applicant will Log Back In

Applicant was Contacted: Case number generated from Send To button:

How Applicant was Contacted:

Application Accepted Or Application Rejected Reason * Date of Decision:

Current Status of Application AHP PENDING, Remove check when Accepted or Rejected:

Application Status Text - seen by the applicant if they log back in to check application status.
 We need you to send us your paperwork within the next three days. Please send it to: Attn: James Fox, Legal Services Network, 2222 New Hampshire Way, Burlington, MO 65888.

Reviewer's Notes

* Form Letters

Application saved Save and Send To * Eligibility OR * Conflicts and Clients OR * Eligibility, Conflicts, Clients

Record: 1 of 1 (Filtered)

Form View FLTR NUM

Let's say the status is "Holding for paperwork" (AHP) and that the applicant should send us his paperwork.

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

Status Information

Results

Application Number: 105
 Problem: Custody / Visitation
 Status: Application on Hold awaiting Papers
 Reviewer's Notes: We need you to send us your paperwork within the next three days. Please send it to: Attn: James Fox, Legal Services Network, 2222 New Hampshire Way, Burlington, MO 65888.
 Application Date: 8/7/2017 4:03:56 PM
 Review/Decision Date:

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.