

# Centralized Intake

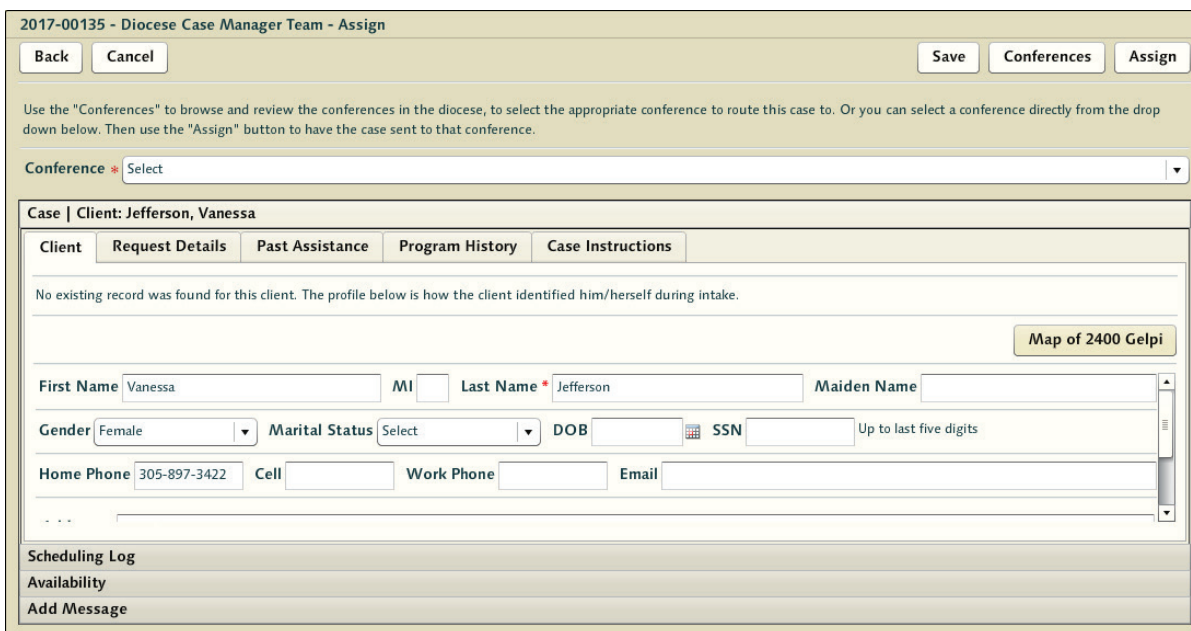
Centralized Intake is the method a diocese uses to support hotline numbers or central callcenter operations where those taking the calls are not working to support a single conference. There are 2 guaranteed roles associated with this operation and people assigned to these roles do not necessarily need to belong to any conference in the system. The first role is called diocese intake - and is the equivalent of a conference intake worker. Diocese administrators simply assign people to this centralized intake role the same way a conference administrator would create a user and assign the intake worker role. The second role, the “diocese case manager” is another diocese level position and mirrors a slightly more powerful version of the conference case manager role. A third, optional role, is called diocese call center volunteer and, if it is used alters centralized intake’s flow to account for an additional early pass at client intake information without performing any vetting or decision making.

The standard process for intake in a centralized workflow is very similar to that of conference intake, beginning by selecting ‘Centralized Case Intake’ from the Main Menu.

Otherwise the intake process is very much the same as that performed by conference intake workers. The major difference being the lack of conferences (and hence no possibility of referral issues). The details are collected in exactly the same manner. There is no assignment and routing process at the end as all centralized intake inquiries end up in a worklist for centralized diocese case managers automatically upon completion.

Members of the diocese case management team select the ‘Unassigned Cases for Diocese Case Manager Team’ option from their Main Menu - displaying a grid of all unassigned inquiries that have been submitted by intake for review and have yet to be assigned to a conference.

Once a diocese case manager clicks on an unassigned case, they'll be given a screen similar to that used by conference case managers. The primary difference between the two is that the centralized process must choose the conference to which the case is being routed. Diocese case managers are given a dropdown of all conferences in the diocese - giving them complete control of where the case should be sent.



They have the ability to review everything about the case - just like conference case managers. This lets them assess everything from the nature of the request to the map of where the client lives.

When satisfied with the conference selection they press [Assign]. This sends the case to the chosen conference, and the workflow returns to the normal casework process just as if the conference itself had performed the intake.



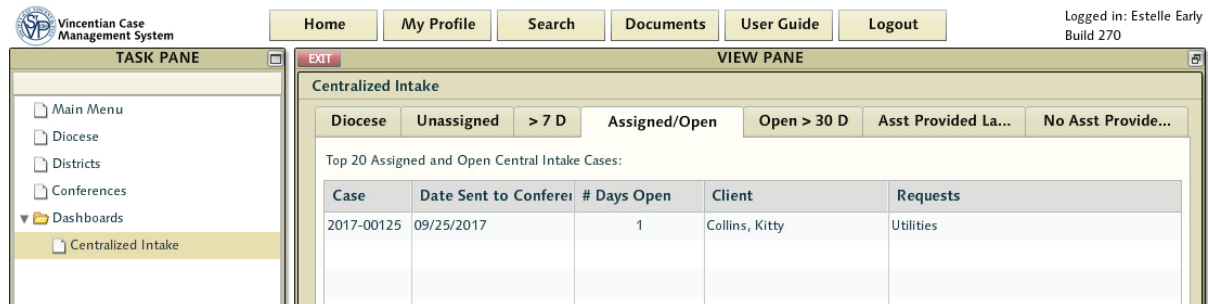
**Note:** This is not an 'exclusive' scenario. If conferences operate their own intake but the diocese also offers an emergency helpline, cases created through this centralized process interleave with other casework that might have been captured locally at the conference.

If the conference to which the casework is assigned uses a case manager team to distribute casework, then cases that have been sent from centralized intake will end up in the conference level case manager's worklist to distribute. Otherwise cases sent to a conference land in the shared worklist where conference caseworkers examine and self assign them as they see fit.

There is one powerful difference that diocese case managers have over the other case distribution systems. Diocese case managers have the ability to pull cases out of a conference if the cases have not been assigned to a caseworker. This allows the centralized manager to note when cases are languishing in a conference and send them to other conferences that might better serve the needs.

If a centralized case manager is reviewing an unassigned case, they will have a [Reassign] button option at the top of the case in question. If selected - the case will be placed back into the unassigned cases grid for the diocese case manager to assign again.

Much of the top level management of these distributed cases can be performed through the use of a special Centralized Intake dashboard. This dashboard, found in the 'Dashboards' folder in the ToC section of the user interface, includes a logical breakdown of the casework generated through the centralized intake process that is currently active in the various conferences. Unlike other Dashboards, this screen is both informational and functional - with tabs for the different column elements and interactivity in the resulting grid data display.



Tab Name	Description
Diocese	The first and default display and shows the general state of casework generated by the centralized intake process across the diocese.
Unassigned	This allows the case manager to review cases that were instantiated via the centralized intake process that are still in an unassigned state. Clicking on these cases will bring the case to the window for review and allows the case manager to reassign the case from this conference. This should be a rare function but is supported to allow centralized managers to recall a case from a conference and then send it to another.
>7D	This is a tab that shows cases that have been in this unassigned state for more than 7 days. As with the Unassigned tab, cases here may be reviewed and reassigned.
Assigned/Open	This shows all cases that originated from the centralized intake process that are being worked at the various conferences. Clicking on these cases brings up a split screen showing the current state of the case and the messaging system to allow the diocese case management team to communicate with the caseworker if they have questions or important information regarding the case.
Open > 30D	This shows the cases that have been in the hands of caseworkers for more than 30 days and are still not closed. Selecting these cases has the same functionality as the cases from the Assigned/Open tab.

Asst Provided Last 30 D	This tab that shows cases where assistance was closed assistance provided in the last 30 days.
No Asst Provided Last 30 D	This tab showing cases that were closed no assistance provided the last 30 days.

Much of this dashboard is very functionally active as diocese case managers need tools to be able to review the work that's happening in the conferences in real time. The columns and details within the tabs should provide adequate visibility.

### Alternate Process - the Diocese Call Center Volunteer Role & Short Form

A two-segment short form that includes an abbreviated 'Client Profile' tab and a full 'Request Details' tab is another option for centralized dispatch intake. This optional short form effectively breaks up the intake workflow into two steps and is supplied for Diocese who wish to supply their intake volunteers with more limited tasks.

The role that performs the short form tasks is the diocese call center volunteer. These users will perform this simpler version of intake - collecting limited client tab data and the details of the assistance request only. Upon completion of the short form, these inquiries are submitted and made available to a 'New Centralized Inquiries' worklist - which can be managed in sequence by diocese intake persons.

The screenshot shows a web form titled "Central Inquiry". At the top, there are "Cancel" and "Save" buttons on the left, and a "Next >>" button on the right. Below the title bar, there are two tabs: "Client Profile" (which is active) and "Request Details". The "Client Profile" tab contains several input fields: "First Name" (with a red asterisk), "MI" (with a dropdown arrow), "Last Name", "DOB" (with a calendar icon), "SSN", "Home Phone", "Cell", "Email", and a "Homeless" checkbox. Below these is an "Address" field (with a red asterisk) and a "City" field (with a red asterisk). To the right of the "City" field are "State" (with a dropdown menu showing "Select") and "Zip" fields.

For this role, the client inquiry will show up in their 'My Assigned Cases' lists if the end data on both one or both segments of the sort form are incomplete. Due to the brevity of the short form, the incidence of saving intake work for these new volunteer staff is less likely an issue. Once delivered to the 'New Centralized Inquiries' worklist, the existing diocese intake persons will take it from there and perform the more comprehensive matching functionality.

The intake remains an inquiry until it has been through open case review, which wont happen until after a diocese intake person has taken over and gone through the inquiry process of client matching.



**Note:** for as long as the intake is an inquiry, it remains under the regular inquiry timeout. This configurable timeout will make the inquiry disappear if it has not been taken through the matching process and converted to a case. This regular inquiry timeout operates under the assumption that intake efforts abandoned or lost track of (duplicates etc) should be removed from the list automatically if they are not properly canceled by intake workers.

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When the diocese intake person selects an inquiry from the new work list, they get the full intake wizard on the first tab, in read only, and need to accept it to own that intake so they can take it through to the end without interference. Once accepted, this intake flow is identical to the current intake flow, except for the display of the household size in the 'Household' tab that the call center volunteer captured on the 'Request Details' tab in the limited flow (this number is only used in intake for the purpose of verification and is not carried forward into the casework).