Client Intake Section

Introduction

The Agular CMS system for St Vincent de Paul is built to help collect and manage information - streamline the process for reporting and audit - and add clarity to the request approval process. The fundamental mission is to improve the process of getting assistance into the hands of the poor - and at the same time help the organization demonstrate to anyone reviewing the work SVdP does on a daily basis exactly how critical those efforts can be in people's lives. However, none of those goals can be accomplished without first collecting the information from those in need.

The first step in this path is gathering some portion of information and attempting to determine if the client in question is already in the system. It's an important step as it helps to filter people based on eligibility.

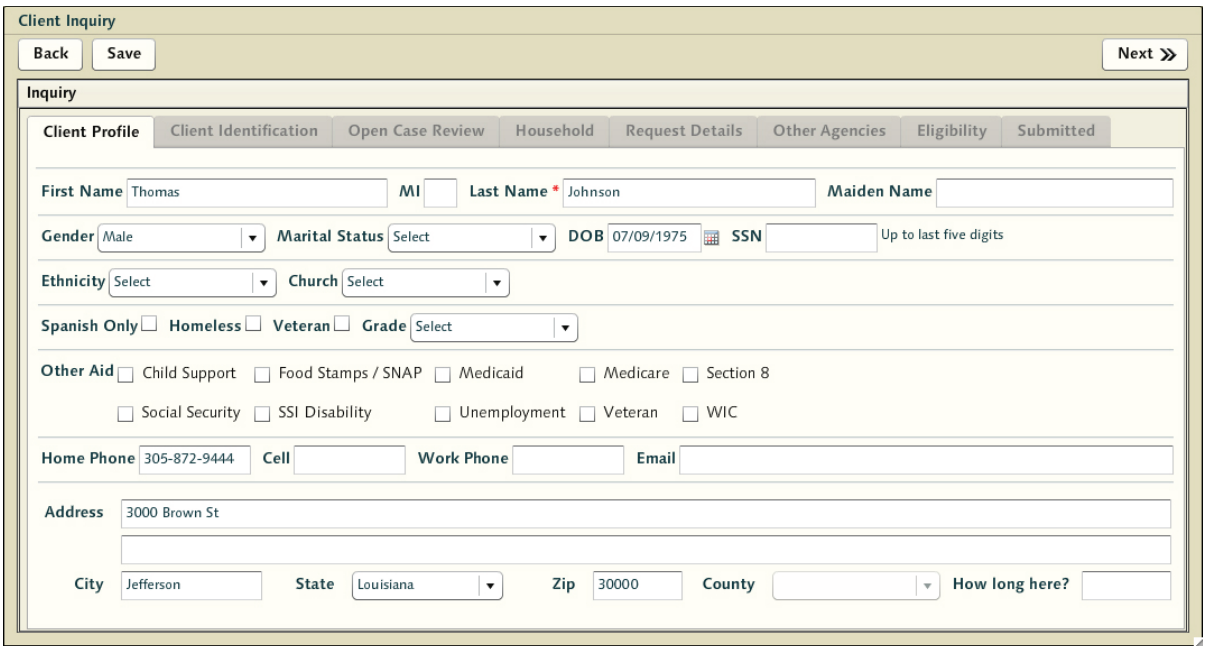
Many conferences handle assistance as 'event driven' - they're simply counting the number of people helped and move on - focusing solely on the particular instance of helping a needy individual with one bill or one bad situation. But the mission of St Vincent de Paul is to help address the systemic problems the poor face - and they often need real long term help that cant simply be accomplished with a little help with an electric bill.

When a petitioner contacts SVdP for help, their information is collected and placed in a record - much like a patient record at the doctor's office. These 'client profiles' - which are all the details (address, phone number, etc) related to that person - are the key to helping review the situation of the individual and assess what sort of help SVdP can bring to the table. They also tend to change over time - but that doesn't mean the system should create new client profiles every time someone changes phones - nor should it lose track of the assistance rendered to a woman who marries and changes her name. So when the intake operator gets to creating a case they should have to put in some effort to ensure that they're working with an individual who is either not in the system, or is someone who is in the system but isn't currently being dealt with (by a caseworker in this conference or any other withing the diocese). This means the CMS engine has to do a lot of very complex matching - trying to tie people together by phone numbers or addresses or household members - and present the intake worker with a 'best guess' scenario.

Client Inquiry

Intake begins with the inquiry stage - where supplied details are entered and the system attempts to match to individuals already on record. This is a multi-step process that is only as complex as the sum of the details that have been supplied in the client profile. It is also interactive - with the intake worker presented a series of results for review in each successive identification effort. As the process plays out, the user can select suggested cases and examine them and make a decision at any point either to go forward with a selected result or continue the inquiry process leading to the instantiation of a new client.

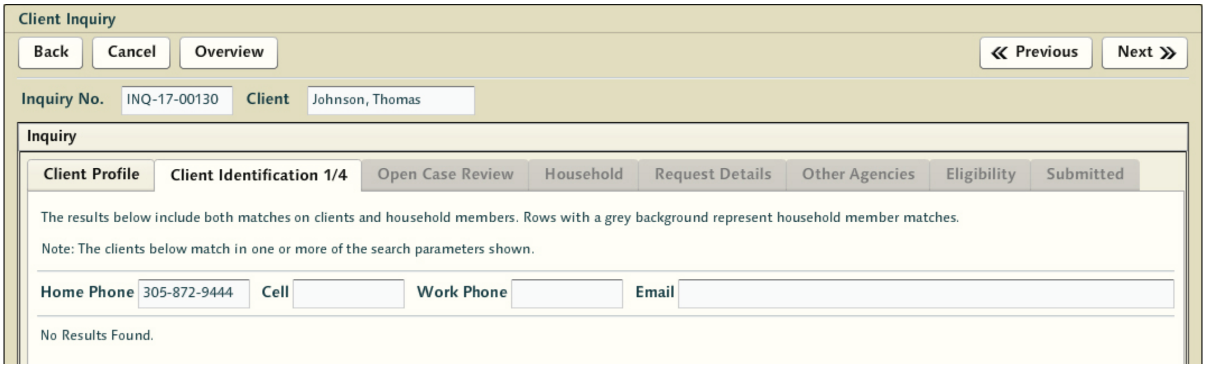
Inquiries, once begun, become assigned work for the intake worker performing the query. This means they're saved and available for the worker to return to and consider at a later time if, for some reason, work on the process needed to pause.



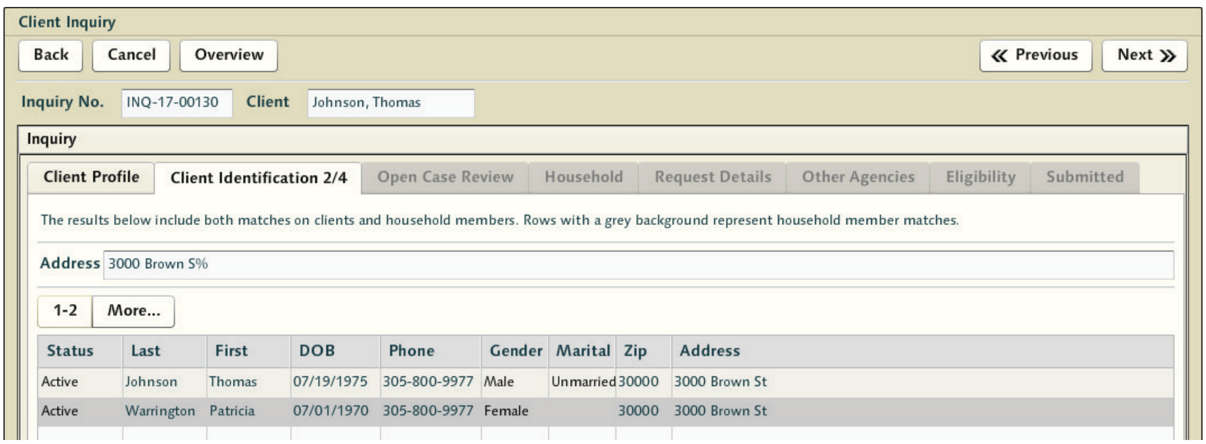
It is important to reiterate that the initial client profile screen in the inquiry process is not a search screen. Wildcards cannot be placed into the fields as they can in search processes found from the [Search] button at the top of the screen.

When a client contacts SVdP it is necessary to supply enough information that they can be contacted. In addition, it is critical for intake to capture as much information on this screen as possible on the assumption that the subject of the inquiry is not in the system. A name and a phone number might be enough to suggest this is a new client, but an address might point out that there is a client record already in that residence. Also, if a new address is provided by someone who is an existing client - but the intake worker fails to record it - the case will go forward on the assumption that the client lives at the old address creating the potential for confusion and wasted effort.

When the intake worker presses next from the client profile screen - the system will analyze the data that's been entered - and determine how many types of matching algorithms it is able to perform. The process for the intake worker can be very quick if there is a matching client record in the system. This search battery attempts to match the details with the greatest degree of uniqueness/accuracy first, so if there is a match the client record can be selected and the rest of the search effort can be skipped.



The process continues, with intake workers stepped through several screens working with the system as it makes suggestions as to possible matches. In most situations, if it's matching on phone number or address the odds are the search result has connected the client to an existing client record.

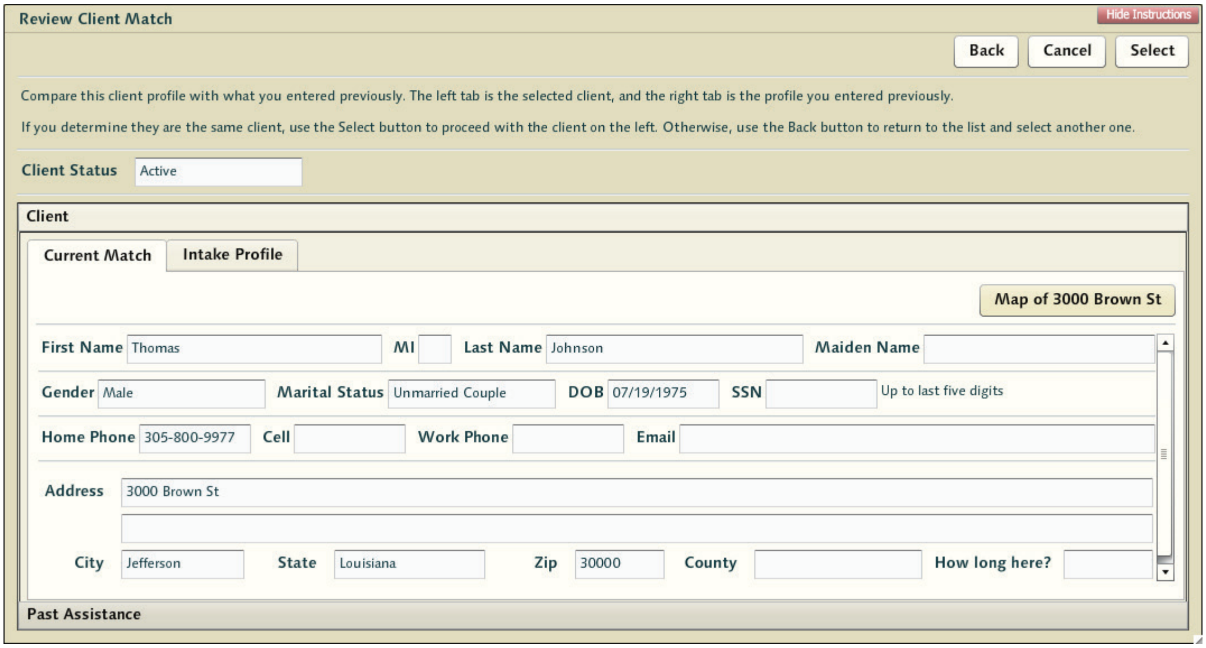


In each case, the details that are being used in each successive search are presented as text within the text boxes of the profile. In some screens the data may appear altered - for example to test for perfect matching names or addresses that are 'close but not exact'. The nature of the logic is that the system is trying combinations of highly unique elements in an effort to suggest connection but ultimately relying on the intake worker's judgment. If the elements for a particular type of search are not present in the submitted client profile - for example if date of birth is not supplied - then that component of the search effort will be skipped.

Parameters Used in the Inquiry Process

- Last Name
- First Name
- Address Line 1
- Date of Birth
- Phone Number (incl all recorded numbers)
- Household Membership
- Last 5 Social Security
- Soundex search for misspelled/sound-alike names

When there is a match the intake worker can select that record by clicking the name from the grid. This will bring up the 'Review Client Match' screen to consider if the details match up to those collected. Two tabs are presented - the data captured in the intake profile, and the data residing in the system in the selected current match of the client record. If a client record association is made and the [Select] button pressed this ends the inquiry process.



If the battery is completed and no matches are found in the system, then the intake worker may go forward with the case as a new client.

Requests from a Household Member

Matches that are not client records in the system but are merely household members will appear with gray backgrounds and should group with other household members. In these instances it is most likely the intake worker will want to continue using the existing relationship with the household member that carries established history with SVdP as opposed to the individual that might be making the request. There are times when a household member contacts SVdP where the household client of record is someone else at that residence. Selecting the gray background household member shows the details of that member in the system.

If this is adjudged to be the person in question, the case profile information will change to that of the client record associated with the head of the household. For example, if the daughter of a woman who had an established history with SVdP contacted a conference for assistance, the system would present the possible household member match. If that household is selected it will then switch the case details to reflect the client of record for that household.

Note: There could be situations where going forward with the household member as a new client is the correct answer. For example, there could be a divorce or a death in the family. It is up to the intake worker to use their judgment in these situations.