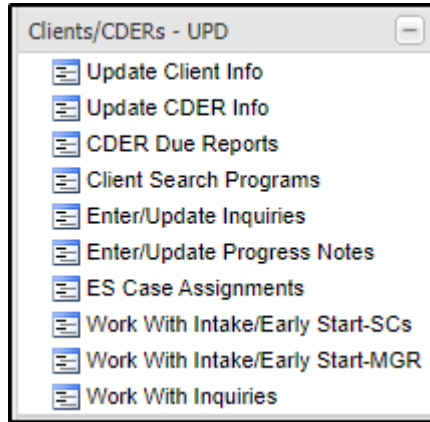
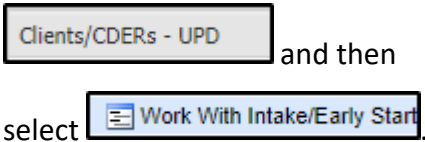


Work With Intakes

The Work With Intakes program allows users to update the Intake/Early Start status. The Service Coordinator’s level restricts access to their caseload and unit only, and the Manager’s level allows access to all cases in Intake/Early Start. Overdue dates will display in red.

From the Navigation Tab, click



The Work With Intakes program will display allowing the user to work with the client records.

The *Service Coordinator Level* restricts the access to their caseload and unit.

The *Manager’s Level* allows access to all cases in Intake/Early Start.


The screenshot shows the SANDIS Work With Intake/Early Start interface. At the top, it says 'Showing both Intake/Early Start'. Below that, there are search filters for 'Service Coord/Unit' (set to EBC) and 'Client #'. There are also radio buttons for 'All Intake/Early Start', 'Intake Only', and 'Early Start Only'. The main part of the interface is a table with the following columns: Spv Tool, UCIF, Last Name, First Name, Date of Birth, Status, Referral Date, F2F/W, ELIG Due, ELIG Complete, Initial TSP, Initial TSP, and Initial CDER. The table contains 14 rows of client data.


Spv Tool	UCIF	Last Name	First Name	Date of Birth	Status	Referral Date	F2F/W	ELIG Due	ELIG Complete	Initial TSP	Initial TSP	Initial CDER
EBC		SEBASTIAN			#0-INTAKE AND ASSESSMEN	06/24/2022		08/08/2022		08/08/2022		
EBC		RAYLA			#1-EARLY START-INFANT/TI	07/02/2021	07/23/2021	08/16/2021	07/20/2021	08/16/2021	08/12/2021	
EBC		SAIL			#1-EARLY START-INFANT/TI	09/16/2021	10/05/2021	10/31/2021	10/13/2021	10/31/2021	10/13/2021	
EBC		ZOE			#1-EARLY START-INFANT/TI	02/08/2022	02/28/2022	03/25/2022	03/04/2022	03/25/2022	03/09/2022	
EBC		HUSON			#1-EARLY START-INFANT/TI	07/21/2021	08/05/2021	09/04/2021	08/16/2021	09/04/2021	08/24/2021	
EBC		ELIJAH			#1-EARLY START-INFANT/TI	09/25/2020	10/16/2020	11/09/2020	10/16/2020	11/09/2020	10/29/2020	
EBC		HECTOR			#1-EARLY START-INFANT/TI	06/10/2020	06/24/2020	07/25/2020	07/07/2020	07/25/2020	07/10/2020	
EBC		ISABELLA			#1-EARLY START-INFANT/TI	06/10/2020	06/24/2020	07/25/2020	07/07/2020	07/25/2020	07/10/2020	
EBC		CHRISTIAN			#1-EARLY START-INFANT/TI	07/12/2021	07/21/2021	08/26/2021	08/03/2021	08/26/2021	08/06/2021	
EBC		SARAHMARGA			#1-EARLY START-INFANT/TI	05/16/2022	05/31/2022	06/30/2022	06/07/2022	06/30/2022	06/14/2022	
EBC		GIOVANNI			#1-EARLY START-INFANT/TI	03/17/2022	04/07/2022	05/01/2022	04/11/2022	05/01/2022	04/29/2022	
EBC		GABRIEL			#1-EARLY START-INFANT/TI	05/12/2021	06/01/2021	06/26/2021	06/04/2021	06/26/2021	06/10/2021	
EBC		NOEMI			#1-EARLY START-INFANT/TI	08/27/2020	09/04/2020	10/11/2020	09/16/2020	10/11/2020	09/23/2020	
EBC		KENDRICK			#1-EARLY START-INFANT/TI	07/15/2021	07/28/2021	08/29/2021	08/04/2021	08/29/2021	08/13/2021	
EBC		DYLAN			#1-EARLY START-INFANT/TI	04/01/2021	04/16/2021	05/16/2021	04/21/2021	05/16/2021	07/30/2021	

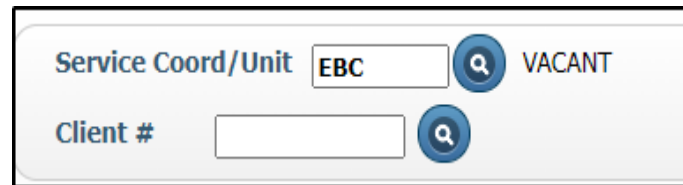
The **Service Coord/Unit** field allows the user to display the information for a specific caseload (ex. EBC).

In the manager's level, the user will have the ability to display the information for any caseload and unit (ex. EB).

To search for a specific client, use the **Client #** field to search.

The  can also be used to search for the Service Coordinator/Unit, or client.

Click the  button to reload the information.

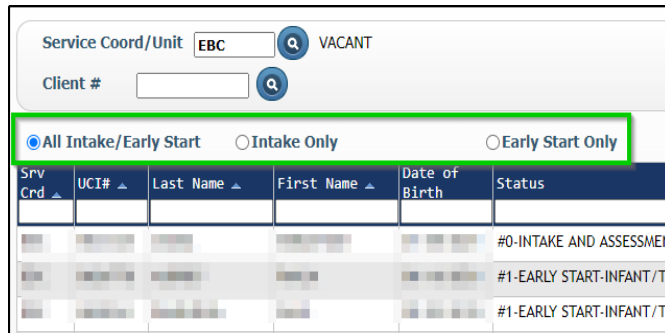


The screenshot shows a search interface with two input fields. The first field is labeled "Service Coord/Unit" and contains the text "EBC". To the right of this field is a blue magnifying glass icon and the text "VACANT". The second field is labeled "Client #" and is currently empty. To the right of this field is another blue magnifying glass icon.

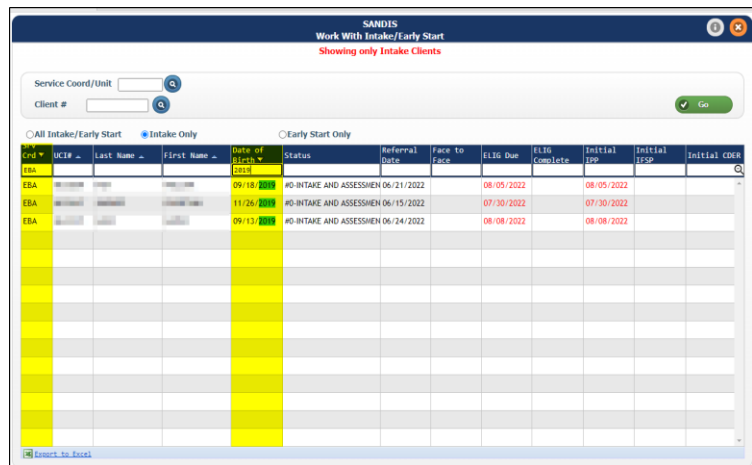


The radio buttons are available to limit the cases displaying by:

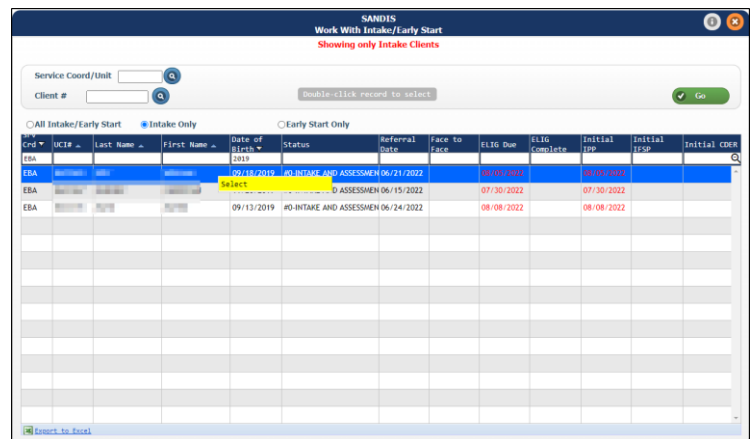
- All Intake/Early Start
- Intake Only
- Early Start Only




The **Filter & Search** feature allows for filtering on one or multiple columns.

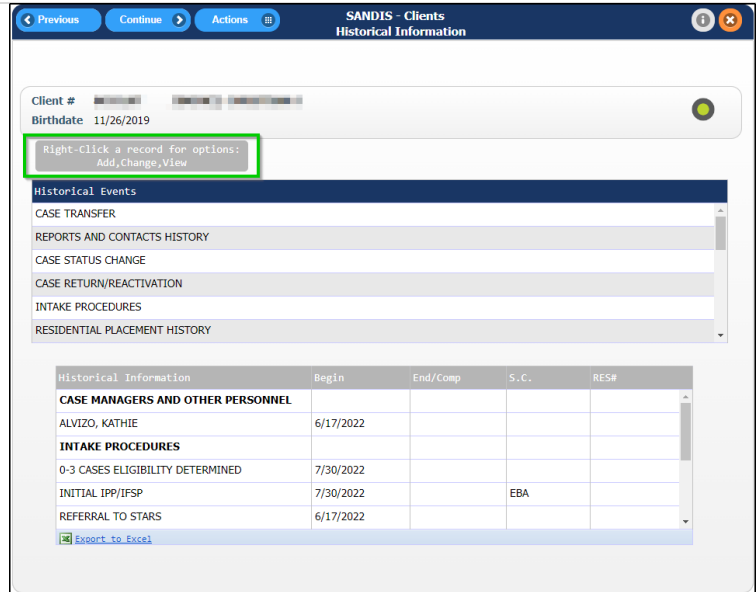



To work with a record, right-click the client and then *Select*. Or double-click the record to select.



From the History Information screen, the user will be able to make Add, Changes, or View the client's record.

After working with the client's record, click  to go back to the Work With Intakes program.



The information can be exported to an Excel spreadsheet by clicking  located at the bottom left of the screen.

