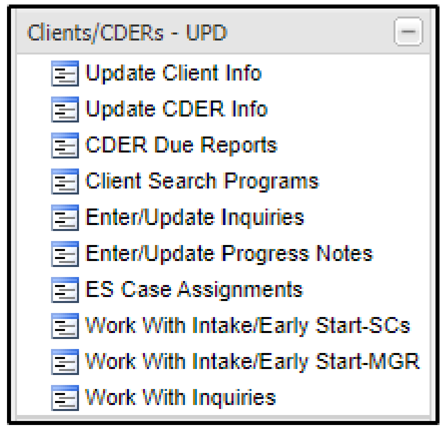
Work With Intakes

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.

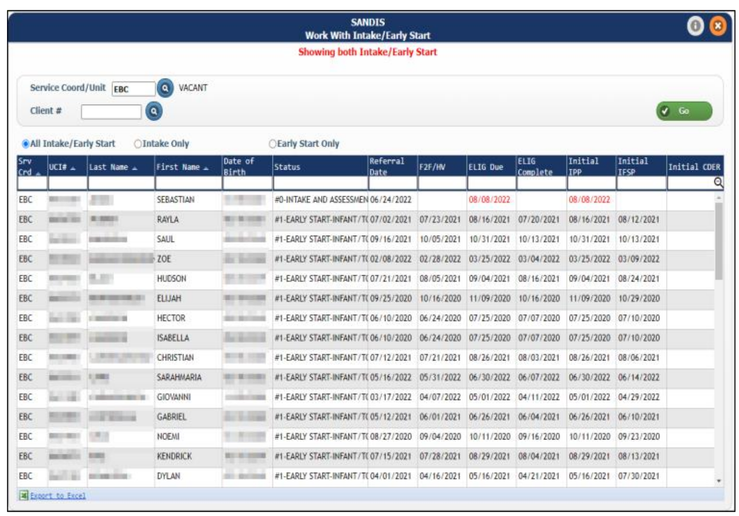
From the Navigation Tab, click Clients/CDERs - UPD and then select Work With Intake/Early Start.



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.



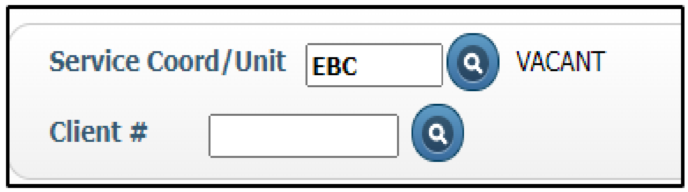
The **Service Coord/Unit** field allows the user to display the information for a specific caseload (ex. EBC).

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.

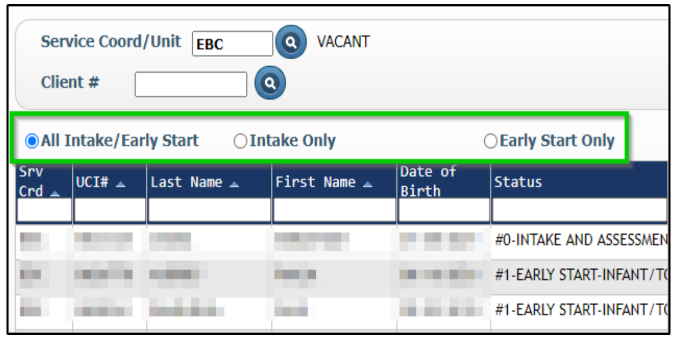
The  can also be used to search for the Service Coordinator/Unit, or client.

Click the **Go** button to reload the information.

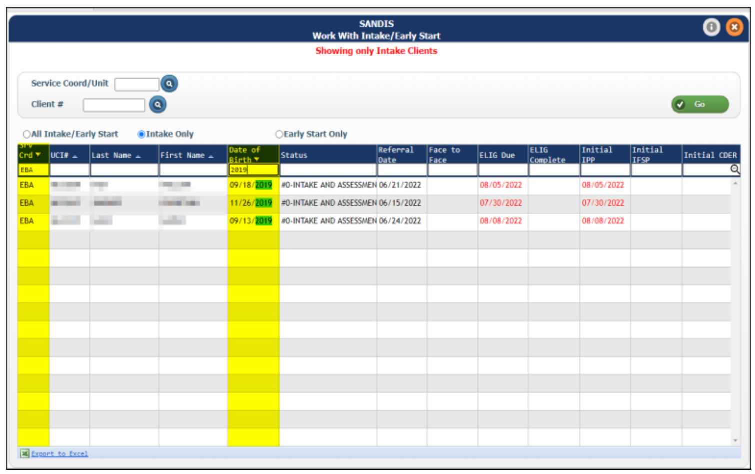


The radio buttons are available to limit the cases displaying by:

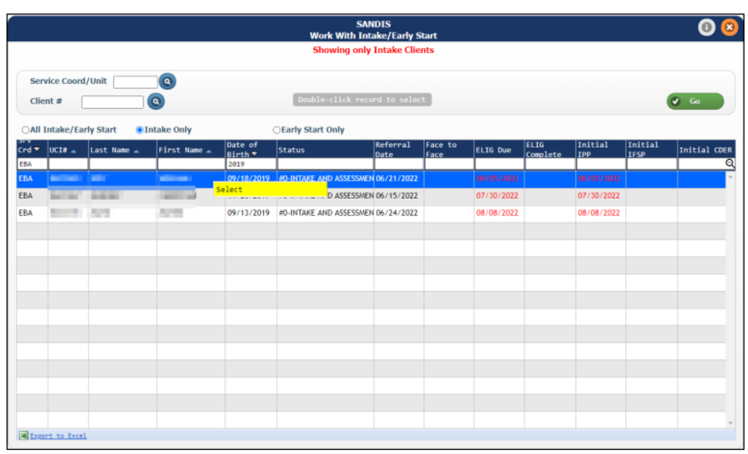
- All Intake/Early Start
- Intake Only
- Early Start Only



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

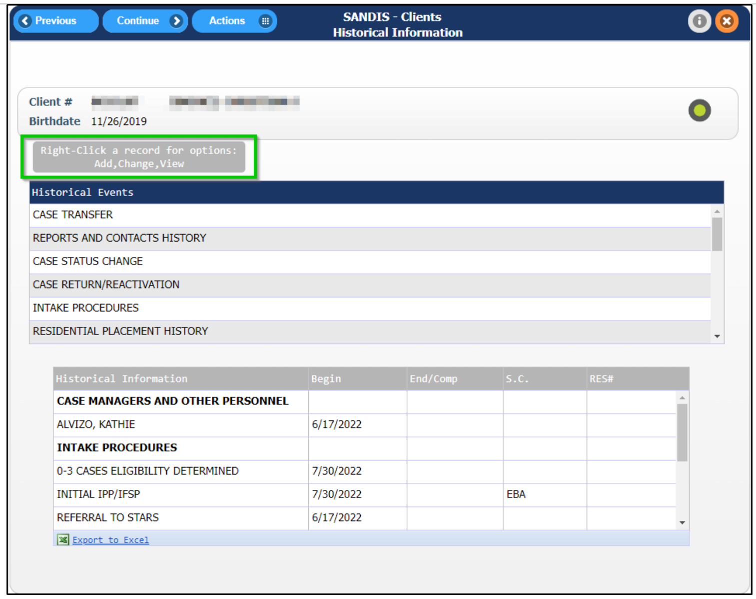


To work with a record, right-click the client and then *Select*. Or double-click the record to select.

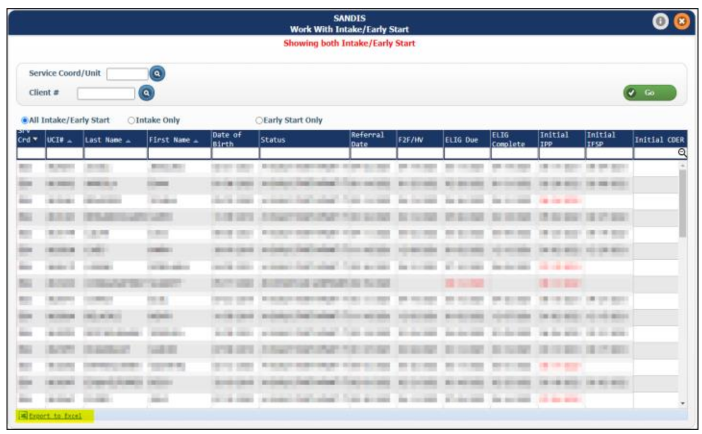


From the History Information screen, the user will be able to make Add, Changes, or View the client's record.

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



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



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