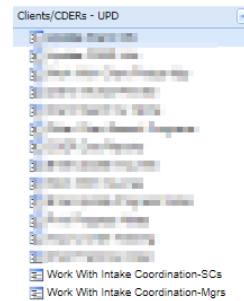


Work With Intake Coordination

The Work With Intake Coordination program allows users to view and interact with information relating to Inquiries, Intake and Early Start cases as well as Closed cases going through the Reopening process. Users have the ability to update each of the cases depending on their level of access. Service Coordinators are restricted to accessing their caseload while Managers have full access to switch between caseloads or units.

The **Work With Intake Coordination** program can be accessed from the Navigation under the Clients/CDERs – UPD menu.



The **Inquiries** table will display displays cases in certain statuses, varied by regional center.

The information that displays includes **Service Coordinator code, Inquiry #, Inquiry Status, Last Name, First Name, Birthdate, Age, Date RC Contacted, To Be Contacted By, Contact Completed, & Zip Code**

SRV_CTR	INQ #	Inquiry Status	Last Name	First Name	Birthdate	Age	Date RC Contacted	To Be Contacted By	Contact Completed	Zip Code
ITE	0101001	CALL #1	ABRICH	WALTER	10/18/2015	08/06m	04/29/2024	05/20/2024		92020
ITE	0101001	CALL #1	CHAVIS	DAWYDSON	10/20/2016	07/05m	04/30/2024	05/21/2024		92058
ITE	0101001	CALL #1	BRUNELLO/BRUNELLO	FRANCO	01/07/2008	16/05m	03/18/2024	04/08/2024		91910
ITE	0101001	CALL #1	BRUNELLO	FRANCO	12/17/2008	15/05m	04/25/2024	05/16/2024		
ITE	0101001	CALL #1	BRUNELLO	FRANCO	10/15/2004	19/07m	01/26/2024	02/16/2024		92069
ITE	0101001	CALL #1	BRUNELLO	FRANCO	02/24/2017	07/07m	04/30/2024	05/21/2024		92139
ITE	0101001	CALL #1	BRUNELLO	CARMELO	06/25/2019	04/10m	04/30/2024	05/21/2024		91950
ITE	0101001	CALL #1	WARRICK	MICHELLE	03/31/2010	14/07m	04/30/2024	05/21/2024		92020
ITE	0101001	CALL #2	ASHFORD	ELIZABETH	02/07/2010	14/07m	04/30/2024	05/21/2024		92114
ITE	0101001	CALL #2	WARRICK	CELIA	11/29/2005	18/05m	04/30/2024	05/21/2024		92037
ITE	0101001	ORIENT/NAVIED	CAPLAN	MICHAEL	05/30/1981	42/11m	03/20/2024	04/10/2024		92123
ITE	0101001	WAITING FOR COLLAT	CRUIK	EDGAR	05/31/1996	27/11m	03/18/2024	04/08/2024		91932
ITE	0101001	WAITING FOR COLLAT	ASHFORD	JAMES	06/20/2015	08/10m	04/30/2024	05/21/2024		92154
ITE	0101001	WAITING FOR COLLAT	ASHFORD	FRANK	12/04/2004	19/05m	05/01/2024	05/22/2024		


The overdue dates will display in red.

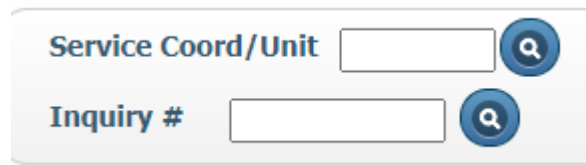


Use the **Intake/Early Start** and **Closed/Reopen** radio buttons to access the **Work with Intake/Early Start** or **Work with Intake Coordination** tables as needed.





A horizontal row of three radio buttons. The first button, labeled "Inquiries", is selected with a blue dot. The second button is labeled "Intake/Early Start" and the third is labeled "Closed/Reopen".

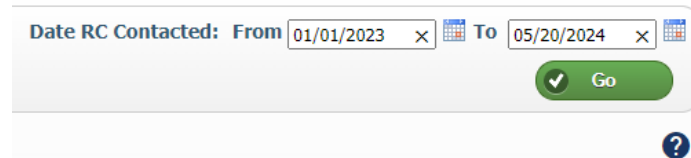
To display inquiry cases assigned to a specific Service Coordinator or Unit, use the Service Coord/Unit field and click on the  button.




Two search input fields. The first is labeled "Service Coord/Unit" and the second is labeled "Inquiry #". Each field has a search icon (magnifying glass) to its right.

To only display a specific Inquiry #, enter the Inquiry # or search by name; then click on the  button.

Modify the **Date RC Contacted From** and **To** date fields if looking to capture a specific date range; then click on the  button.

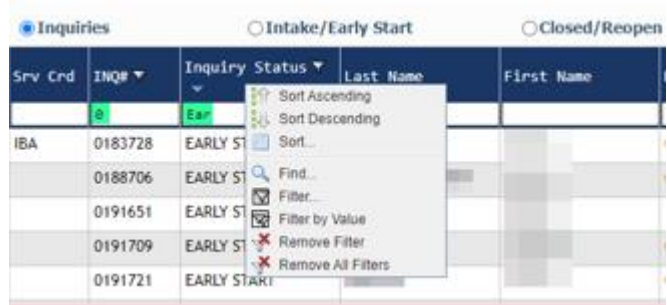



A date range filter interface. It shows "Date RC Contacted: From" followed by a date field containing "01/01/2023" and a calendar icon. This is followed by "To" and another date field containing "05/20/2024" and a calendar icon. Below the date fields is a green "Go" button with a checkmark icon. A question mark icon is located at the bottom right of the filter area.

Click the  button to see additional hints on how to maneuver the grid.

The find/filter and sorting features are available by clicking a column heading.

Additional sort and filter options are available by right-clicking a column heading.



To export the current contents of the grid to an Excel file, click on the  [Export to Excel](#) button to generate and save a copy of the grid to the designated Downloads folder for the current browser.



Double clicking on an Inquiry record will bring up the **Inquiry Information** screen.



All data in the **Inquiry Information** screen can be updated as necessary.

Clicking the **Continue** or **Save** button will save the changes.

To return to the **Work With Inquiries** grid, click on the **Close** button.

SANDIS - Inquiries Inquiry Information

Primary Address Relationships Guardianship Financial Medical Additional Info

Inquiry # [REDACTED] Last Name [REDACTED] First Name [REDACTED] Middle [REDACTED]

Case Manager: ITE Unit: INTAKE
 Inquiry Status: 1 CALL #1 Date: 1/29/2024
 Date of Birth: 10/18/2015 Age: 0008
 Language: 11 ENGLISH Zip Code: 92020
 Sex: M MALE Ethnicity: 9 UNKNOWN
 Date RC Contacted: 4/29/2024 To be contacted by: 5/20/2024 Contact Completed: [REDACTED]
 Contact: [REDACTED] Phone: [REDACTED] Work: 0 Cell: 0
 Email Address: [REDACTED]
 Relationship: M MOTHER
 Remark: [REDACTED]
 Last Updated 5/06/2024 Characters remaining: 240

The **Work With Intake/Early Start** table displays cases in status 0 or status 1, depending on the Service Coordinator's caseload.

The information that displays includes **Service Coordinator** code, **UCI #**, **Last Name**, **First Name**, **Date of Birth**, **Age**, **Status**, **Referral Date**, **Face to Face/HV**, **Eligibility Due**, **IPP/IFSP Due**, **IPP/IFSP Completed**, & **Initial CDER**.

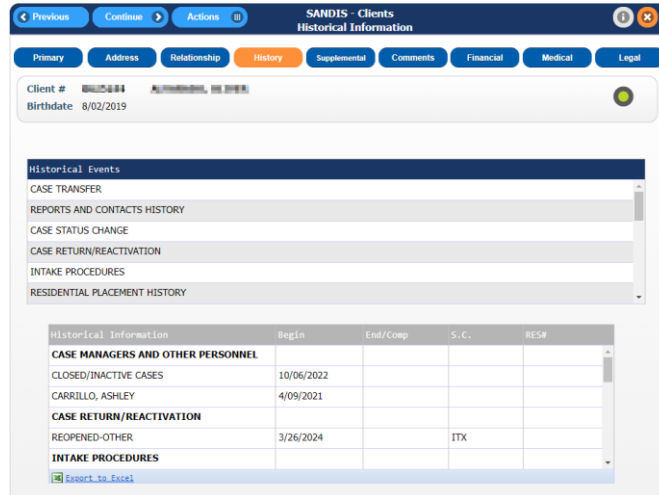
Double clicking on a record will bring up the **Historical Information** screen.

SANDIS Work With Intake/Early Start

Service Coordinator: [REDACTED] Client #: [REDACTED]

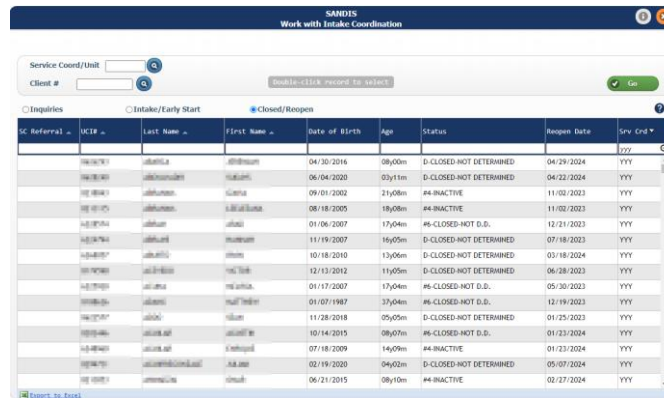
Svc	UCI #	Last Name	First Name	Date of Birth	Age	Status	Referral Date	F2F/HV	ELIG Due	ELIS Complete	IPP/IFSP Due	IPP/IFSP Completed	Initial CDER
ITP	[REDACTED]	[REDACTED]	[REDACTED]	08/02/2019	04/00m	HO INTAKE AND ASSESS	03/24/2024		07/24/2024		05/21/2021	05/11/2021	
ITP	[REDACTED]	[REDACTED]	[REDACTED]	10/25/2002	21/06m	HO INTAKE AND ASSESS	04/05/2024		08/03/2024		12/28/2002	12/18/2002	
ITP	[REDACTED]	[REDACTED]	[REDACTED]	09/17/2014	07/00m	HO INTAKE AND ASSESS	03/07/2024		07/05/2024				
ITP	[REDACTED]	[REDACTED]	[REDACTED]	04/17/2008	16/00m	HO INTAKE AND ASSESS	03/04/2024		12/31/9999	09/13/2024			
ITP	[REDACTED]	[REDACTED]	[REDACTED]	08/20/2007	16/00m	HO INTAKE AND ASSESS	03/21/2024		07/19/2024		12/05/2009		
ITP	[REDACTED]	[REDACTED]	[REDACTED]	01/16/2017	07/06m	HO INTAKE AND ASSESS	03/18/2024		07/16/2024				
ITP	[REDACTED]	[REDACTED]	[REDACTED]	10/25/2014	07/06m	HO INTAKE AND ASSESS	10/11/2023		02/08/2024		10/11/2018	10/04/2018	
ITP	[REDACTED]	[REDACTED]	[REDACTED]	02/06/2016	08/00m	HO INTAKE AND ASSESS	03/26/2024		06/25/2024				
ITP	[REDACTED]	[REDACTED]	[REDACTED]	05/28/2006	17/11m	HO INTAKE AND ASSESS	07/19/2023		12/31/9999	01/30/2024			
ITP	[REDACTED]	[REDACTED]	[REDACTED]	11/01/2019	04/06m	HO INTAKE AND ASSESS	02/06/2024		12/31/9999	09/06/2024		01/16/2022	01/13/2022
ITP	[REDACTED]	[REDACTED]	[REDACTED]	02/09/2008	16/00m	HO INTAKE AND ASSESS	11/30/2023		03/29/2024				
ITP	[REDACTED]	[REDACTED]	[REDACTED]	06/09/2008	14/11m	HO INTAKE AND ASSESS	10/04/2023		02/01/2024				
ITP	[REDACTED]	[REDACTED]	[REDACTED]	06/30/2014	09/10m	HO INTAKE AND ASSESS	11/01/2023		02/29/2024				
ITP	[REDACTED]	[REDACTED]	[REDACTED]	04/20/2014	08/00m	HO INTAKE AND ASSESS	03/13/2024		07/11/2024				
ITP	[REDACTED]	[REDACTED]	[REDACTED]	04/20/2014	08/00m	HO INTAKE AND ASSESS	03/24/2024		07/24/2024				

The data in the **History** screen can be updated based on the user's level of access. The user has the ability to access other screens such as the Primary, Address, Relationship, etc.




Closed or Inactive cases where clients would like to reopen their case can be tracked using the **Closed/Reopen** option.

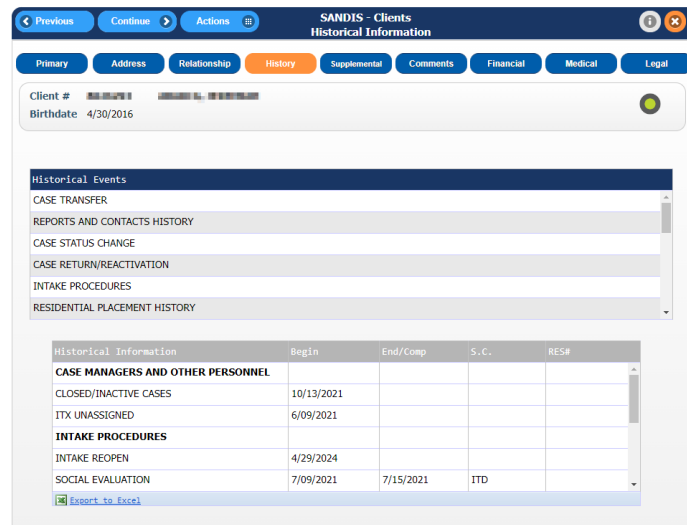
Double clicking on a record will bring up the **Historical Information** screen.



The data in the **History** screen can be updated based on the user's level of access. Other screens can be accessed, such as the Primary, Address, Relationship, etc.

An entry under **Intake Procedures** for **Intake Reopen** will make the closed case show. Entering an End Date will remove it.

To return to the **Work With Intake Coordination** grid from any client record, click on the  button.



Historical Information	Begin	End/Comp	S.C.	RES#
CASE MANAGERS AND OTHER PERSONNEL				
CLOSED/INACTIVE CASES	10/13/2021			
ITX UNASSIGNED	6/09/2021			
INTAKE PROCEDURES				
INTAKE REOPEN	4/29/2024			
SOCIAL EVALUATION	7/09/2021	7/15/2021	ITD	