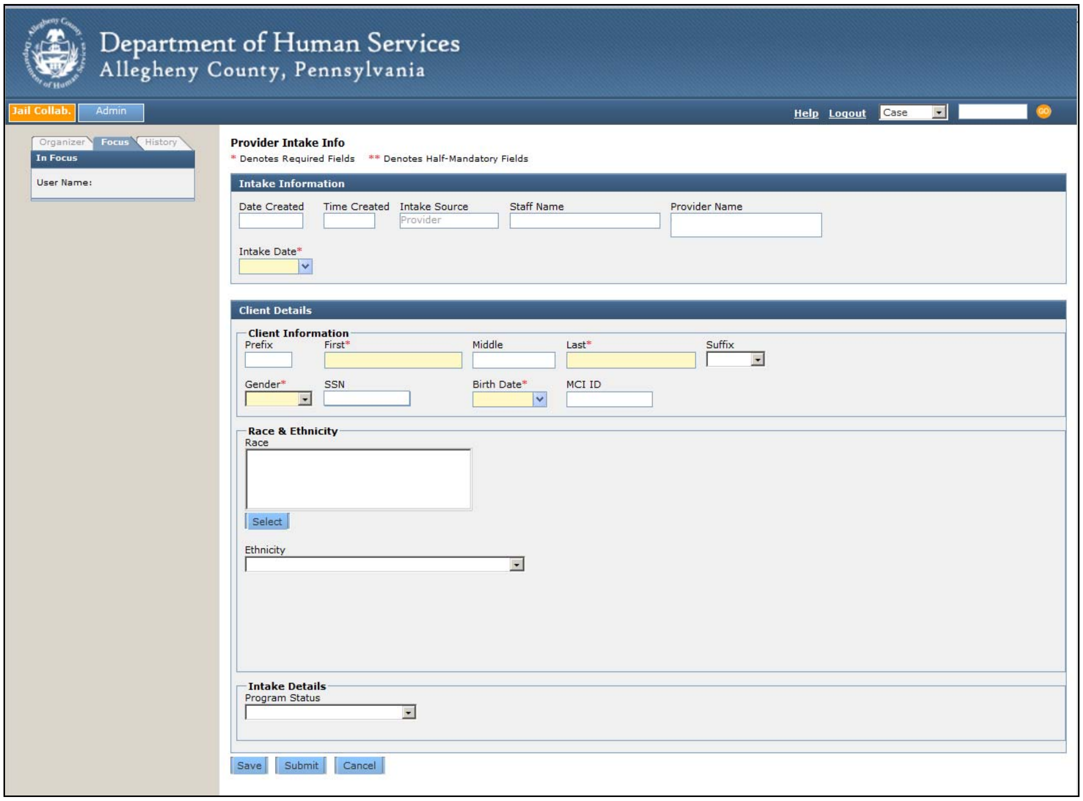
Jail Collaborative- Documenting a New Provider Intake

Provider users of the Jail Collaborative application create Intake records for clients. This Job Aid includes the steps needed to complete a New Intake in the Jail Collaborative application by a provider.

Accessing and completing the Provider Intake Info screen



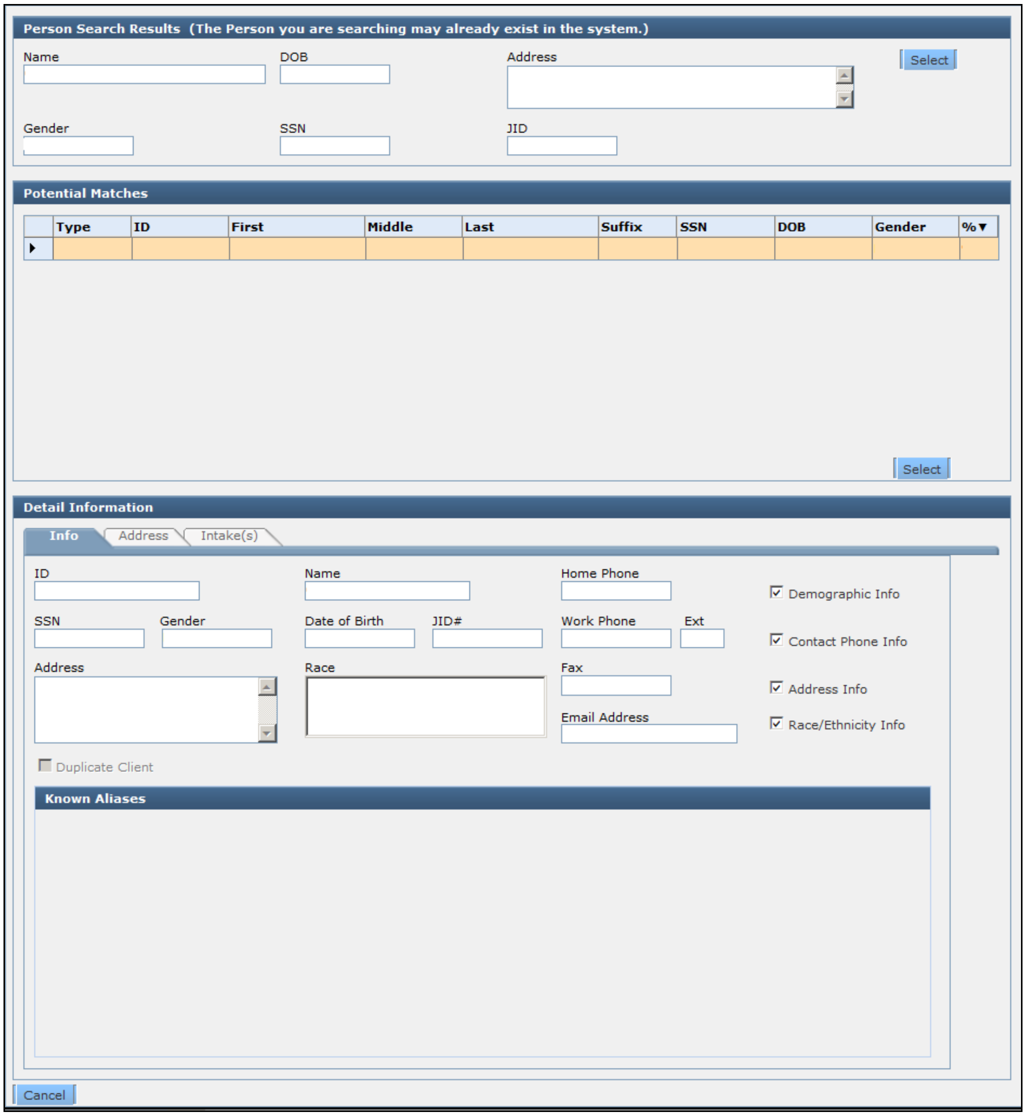
1. Navigate to the *Provider Intake Info* screen.
    a. **Jail Collab. > New**
2. The *Date Created* and *Time Created* fields will populate with the date and time when the Intake record is saved.
3. *Intake Source* displays 'Provider'.
4. The name of the logged on Provider user is displayed in the *Staff Name* field.
5. The name of the Agency is displayed in the *Provider Name* field.
6. Enter the *Intake Date*.

Complete the *Client Details* section:

1. Complete all known information about the client: Name, Gender, SSN, and Birth Date.
2. The MCI ID (Master Client Index) will populate with the assigned ID number when the client record is saved.
3. Click the **[Select]** button to select the *Race(s)* of the client. Multiple Races can be selected.
    i. *TIP: Selecting 'American Indian or Alaska Native', 'Other Asian', 'Other Pacific Islander', or 'Other Race' will prompt additional fields to be displayed.*
4. Select the *Ethnicity*.
5. Select the *Program Status*.
    i. *TIP: A client can have only one of each Program Status active at a time. When an Intake Client record is saved and has a Program status associated to a different intake record, a validation message is displayed. Click* ***[OK]*** *to remove the message and select a different applicable Program Status.*
    ii. *TIP: A Provider user can leave the Program Status field blank.*

6. Click the **[Save]** button to save your entries.
    i. *TIP: When saving a new client record, the Jail Collaborative application completes a client search to determine if the client is a known entity to the Department of Human Services (DHS). Potential Matches are displayed on the Person Search Results pop-up.*
    ii. *TIP: If the client being registered is not a known entity to DHS, the MCI ID field is populated with the identification number assigned to the client.*
7. Click the **[Submit]** button to finalize the *Provider Intake Info* screen.
    i. *TIP: A successful submission confirmation message is displayed. Click the* ***[OK]*** *button to clear the pop-up.*
    ii. *TIP: The client is not displayed on the My Services screen as an active service until a Service Referral is completed.*

Person Search Results pop-up



1. Select a name in the *Potential Matches* grid.
2. Review the information on the tabs in *Detailed Information* section.
3. If the record selected in the *Potential Matches* grid *IS NOT* the same as the Jail Client, click the **[Select]** button located in the top section of the pop-up.
    a. This closes the *Person Search Results* pop-up and returns to the *Provider Intake Info* screen.
4. If the selected record does match your Jail Client, click the **[Select]** button located in the *Potential Matches* section.
    i. *TIP: The checkboxes located on the right side of the INFO tab will allow you to limit the known information that populates into the client record. Unmarking a checkbox will not bring that known information forward into*

the client record.

a. If an open Provider Intake exists for the selected Jail Client that has been created by same Provider Agency as the logged on user, a pop-up is displayed indicating that an open Intake exists and a new Intake cannot be created. Click **[OK]** to remove the pop-up message.

For more information…

For assistance, please contact the Allegheny County Service Desk at servicedesk@alleghenycounty.us or 412-350-4357 (Option 2 for DHS). To access the Self Service Tool go to http://servicedesk.alleghenycounty.us.

This Job Aid and additional user materials are located on the DHS Amazon site at http://dhswbt.s3.amazonaws.com/KIDSJobAids/index.html.