A Quick-Start User Guide
To Using the Siebel/DHS SSP Intake Log
(revised 8/10/2012)

Introduction
This version of the Intake log was modeled on the version you have used for quite some time, but you will notice a few things look a little different. It contains all of the same fields you are accustomed to using except that a couple of them have been re-named to better align with Oracle's data structure and future plans to integrate the Intake Log with other applications.

By the time you receive this user guide your branch Manager(s) will have determined who will be authorized to enter data into the Intake Log and who may have view-only rights.

This new Intake Log stands on the shoulders of a lot of work done by many people over several years to develop an electronic solution to help ease the problem of improving workflow in the branch office environment. Many thanks go to all of the folks (you know who you are) who have contributed to this effort over several years and who remain committed to continuously improving the Intake Log.

This user guide is intended to be as user-friendly as possible with screen shots to help guide you through the process of using the Intake Log. I will not take the place of practice time or attending one of the several webinars planned to familiarize staff with the Siebel Intake Log. The User Guide is designed to flow pretty much in the order most folks will probably use the Intake Log, so if you don't see every possible angle covered, please make a note of it and call or send your suggestion to chris.betts@state.or.us and we will consider whether it needs to be in this guide or noted in some other publication or communication to staff.

Sincerely,
The Electronic Intake Log Project Team

Using the New Intake Log

Requesting Access to the Siebel Intake Log (Manager Approval required)

To request user access to the Siebel Intake Log, send a request containing your first and last name, your OR ID# and your role/position (HSS1, HSS3, etc.) to your Manager and ask them to approve it and forward it to "SERVICEDESK DHS". Please allow 3 - 5 days for the request to be completed.

(Managers may request their own access, but it is the responsibility of the System Administrator who adds the User ID to verify the Manager's role and position)

Step 1 – To start the application

Press [Ctl + Click] on the link below:

https://care.oregon.gov/epublicsector_enu

Creating a desktop shortcut and Favorites bookmark for the application:

To create a bookmark on your "Favorites" list:

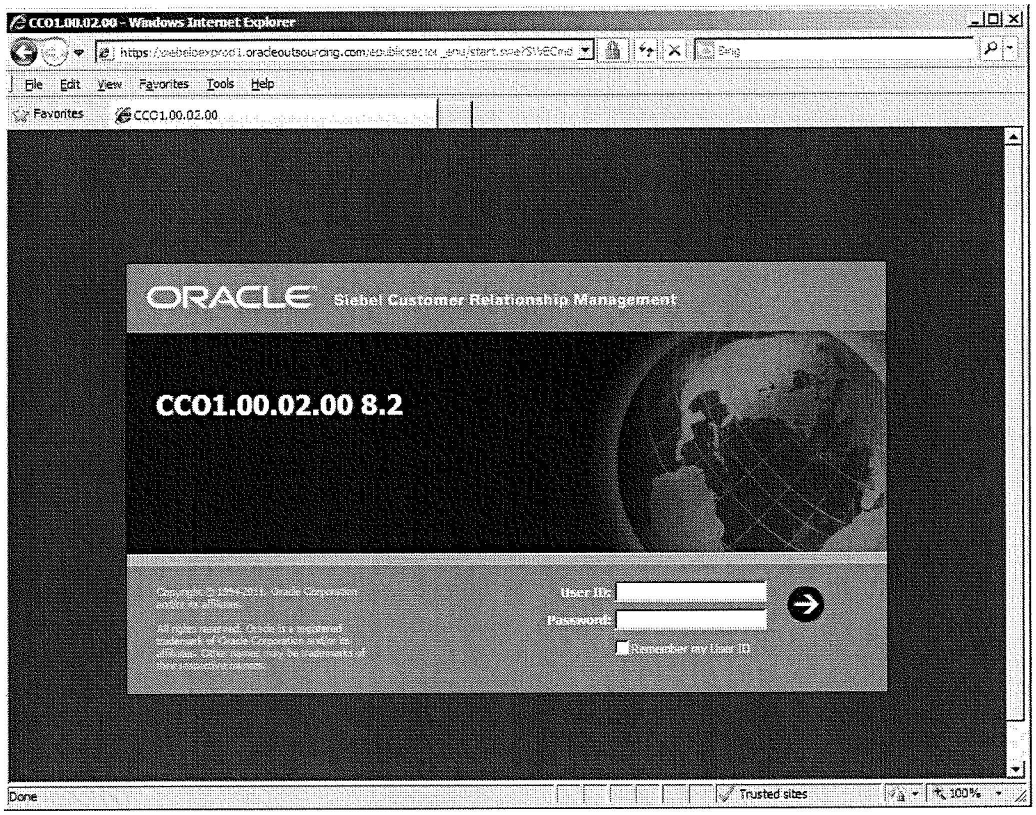
When you reach the login page, edit the browser address bar so that only " https://care.oregon.gov/epublicsector_enu" shows. Then bookmark that URL in your 'Favorites' list. Rename the favorite to "Intake Log".

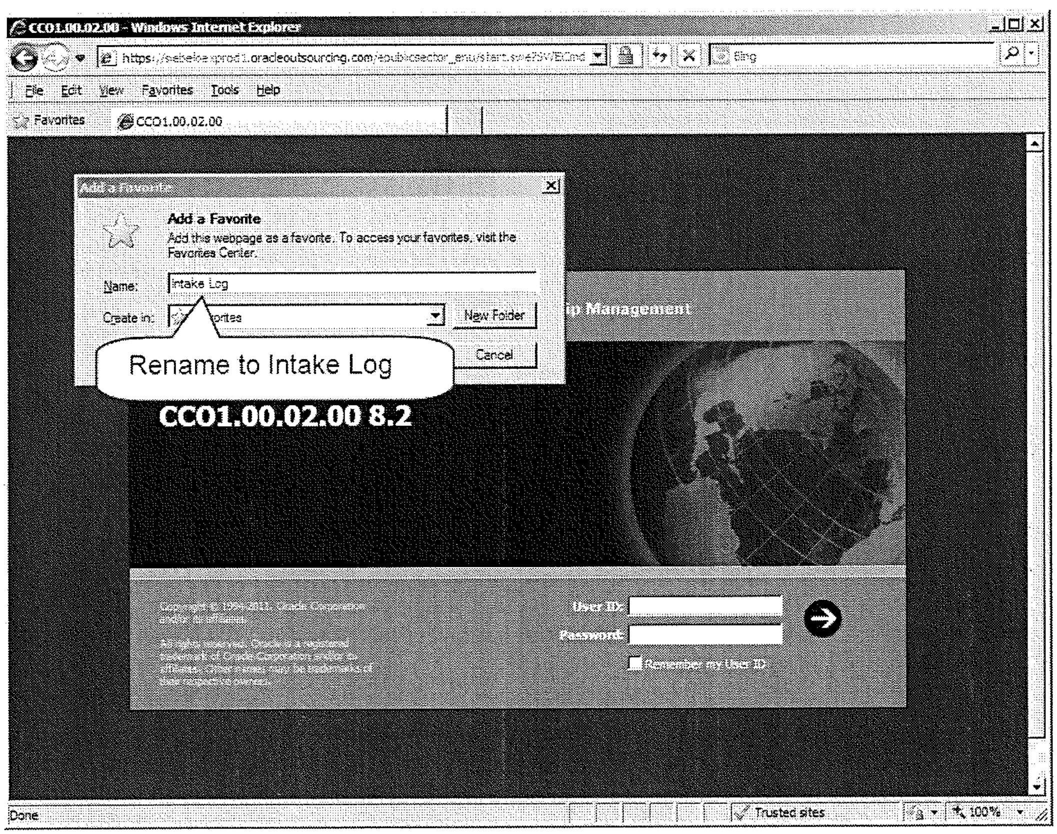
To create a desktop shortcut:

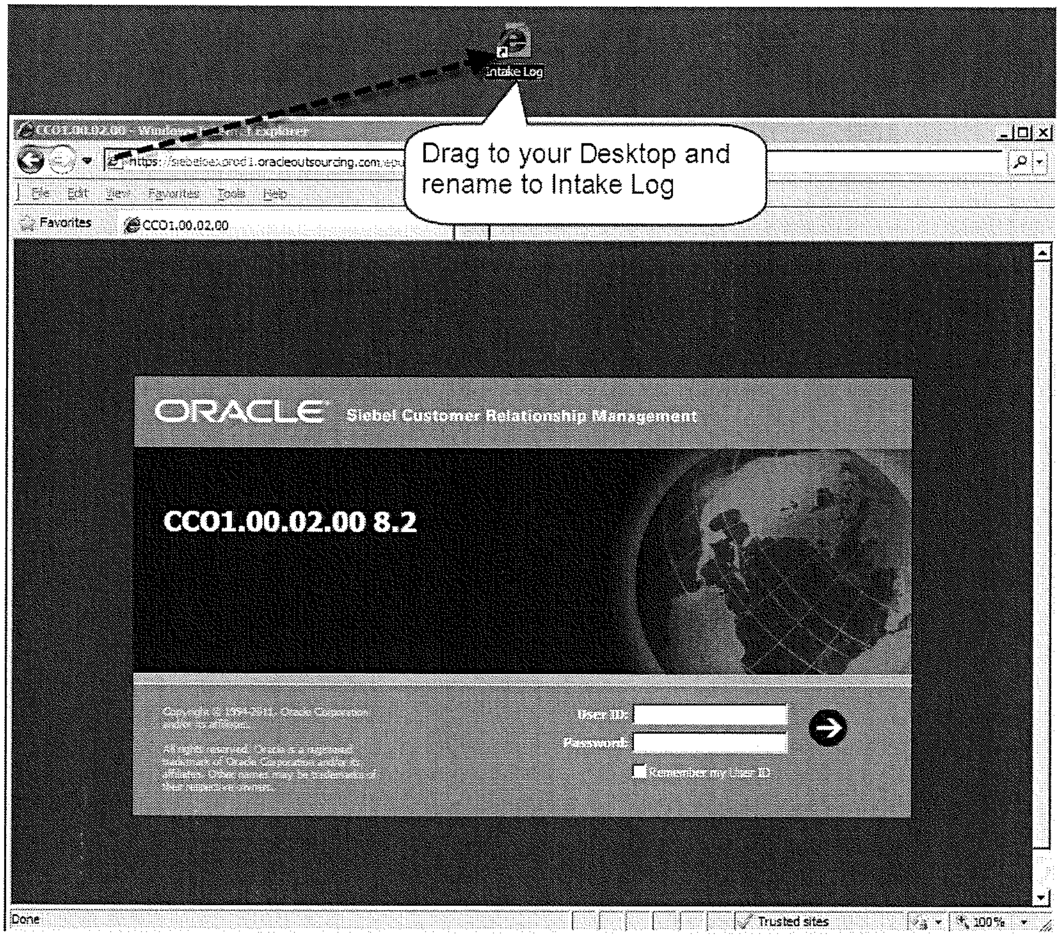
With your internet browser open, click on "Favorites" and locate the new bookmark. Then right-click on it and then select "Create Shortcut".

Then go back to your Favorites list and locate the new shortcut and drag it to your desktop. Then rename the shortcut to "Intake Log"

Once you're on the login page you can also click and drag the Internet Explore Icon from your address bar to your desktop to create a shortcut for your desktop.

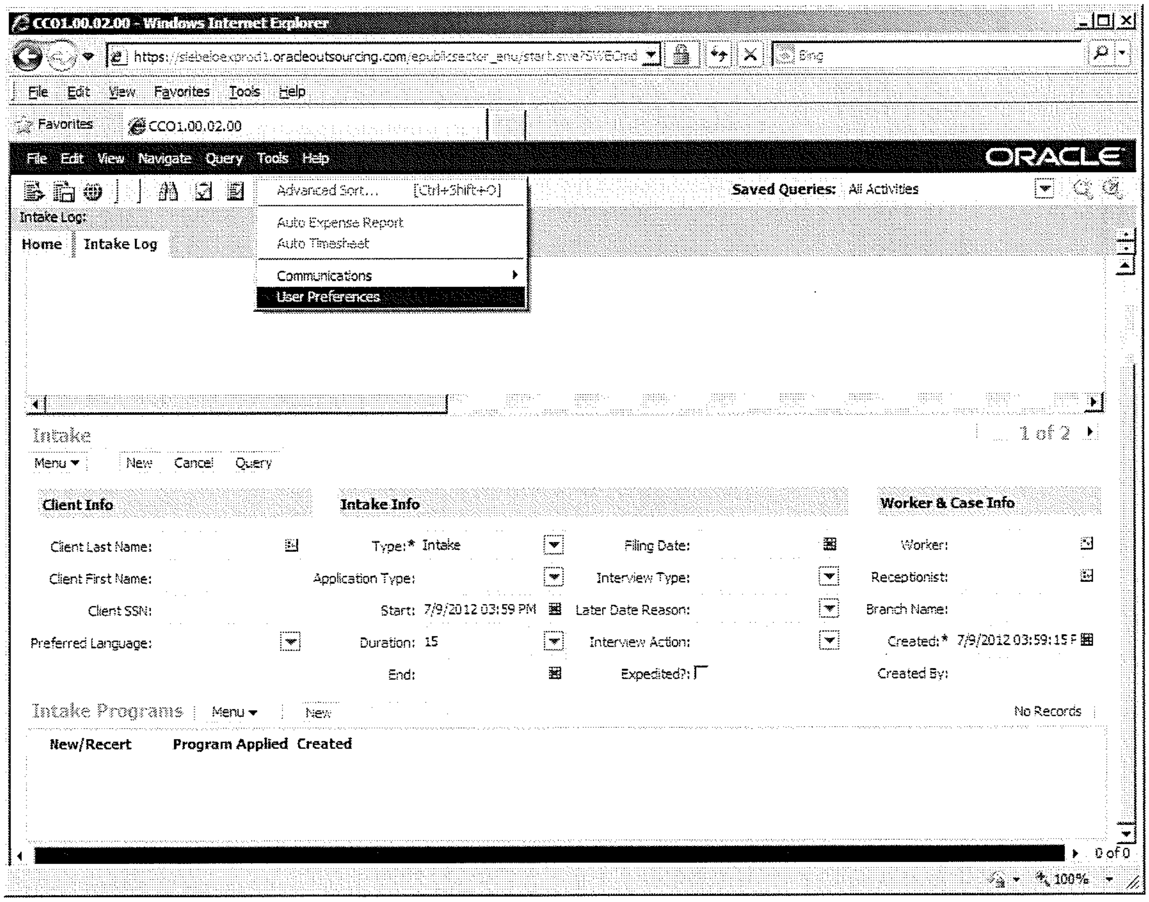

CCO1.00.02.00 - Windows Internet Explorer
File Edit View Favorites Tools Help
Favorites
ORACLE Siebel Customer Relationship Management
CCO1.00.02.00 8.2
User ID:
Password:
Remember my User ID
Done
Trusted sites
100%


CCO1.00.02.00 - Windows Internet Explorer
File Edit View Favorites Tools Help
Add a Favorite
Add this webpage as a favorite. To access your favorites, visit the Favorites Center.
Name:
Intake Log
Create in:
New Folder
Cancel
Rename to Intake Log
CCO1.00.02.00 8.2
User ID:
Password:
Remember my User ID
Done
Trusted sites
100%



Step 2 Log in – Enter your User ID (OR #) and password (Welcome1) then click on the blue circle with the white arrow in it which is just to the right. This will open the application to your home tab and you should see a message "Welcome back Your Name. Today is Wednesday, June 13, 2012."

Step 2a Change Password – After logging in for the first time, change your password to match your Active Directory password, by clicking "Tools" then "User Preferences", entering your new password twice, and clicking "Save":


CC01.00.02.00 - Windows Internet Explorer
File Edit View Favorites Tools Help
File Edit View Navigate Query Tools Help
ORACLE
Advanced Sort... [Ctrl+Shift+O]
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Auto Timesheet
Communications
User Preferences
Saved Queries: All Activities
Intake Log:
Home Intake Log
Intake
1 of 2
Menu New Cancel Query
Client Info
Intake Info
Worker & Case Info
Client Last Name:
Client First Name:
Client SSN:
Preferred Language:
Type:* Intake
Application Type:
Start: 7/9/2012 03:59 PM
Duration: 15
End:
Filing Date:
Interview Type:
Later Date Reason:
Interview Action:
Expedited?:
Worker:
Receptionist:
Branch Name:
Created:* 7/9/2012 03:59:15 P
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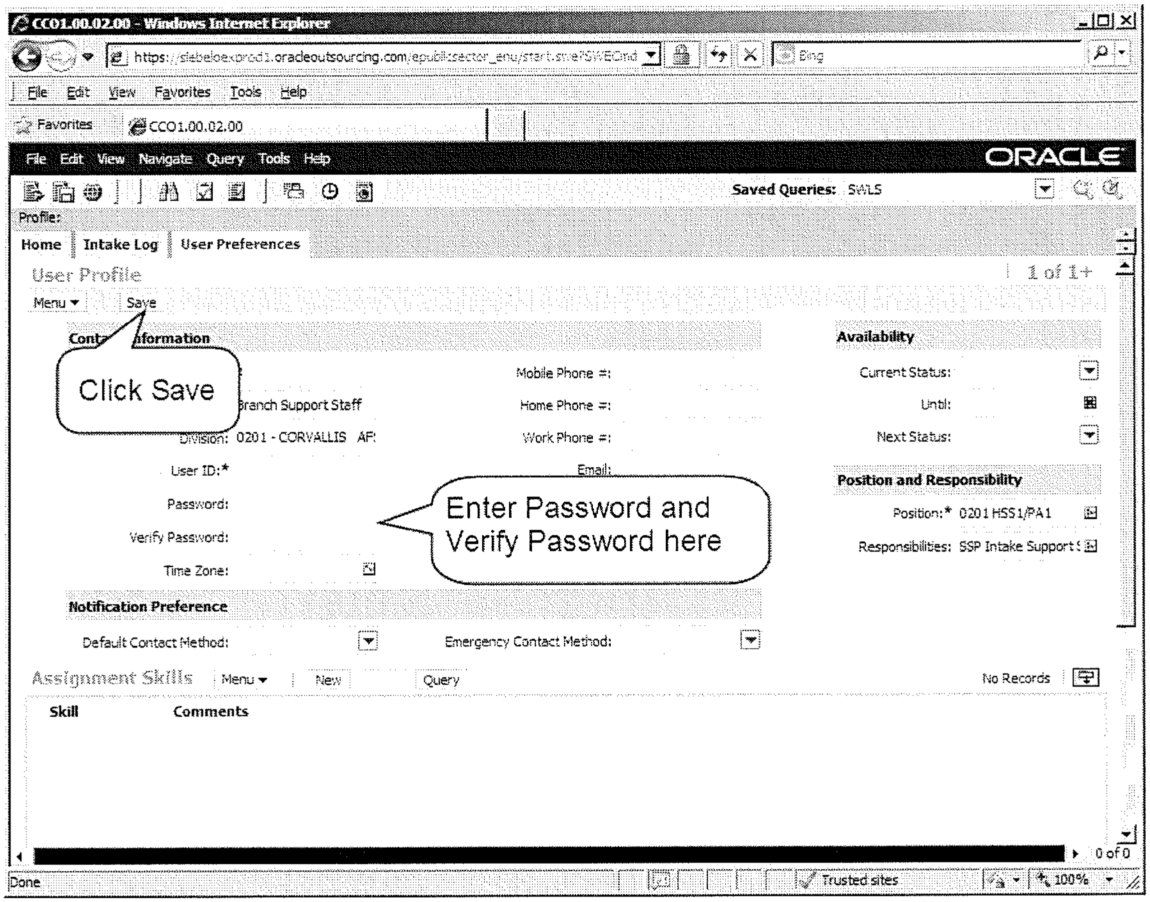
CCO1.00.02.00 - Windows Internet Explorer
Home
Intake Log
User Preferences
User Profile
Menu
Save
Click Save
Contact Information
Branch Support Staff
Division: 0201 - CORVALLIS AF
User ID:*
Password:
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Time Zone:
Mobile Phone #:
Home Phone #:
Work Phone #:
Email:
Enter Password and Verify Password here
Availability
Current Status:
Until:
Next Status:
Position and Responsibility
Position:* 0201 HSS1/PA1
Responsibilities: SSP Intake Support
Notification Preference
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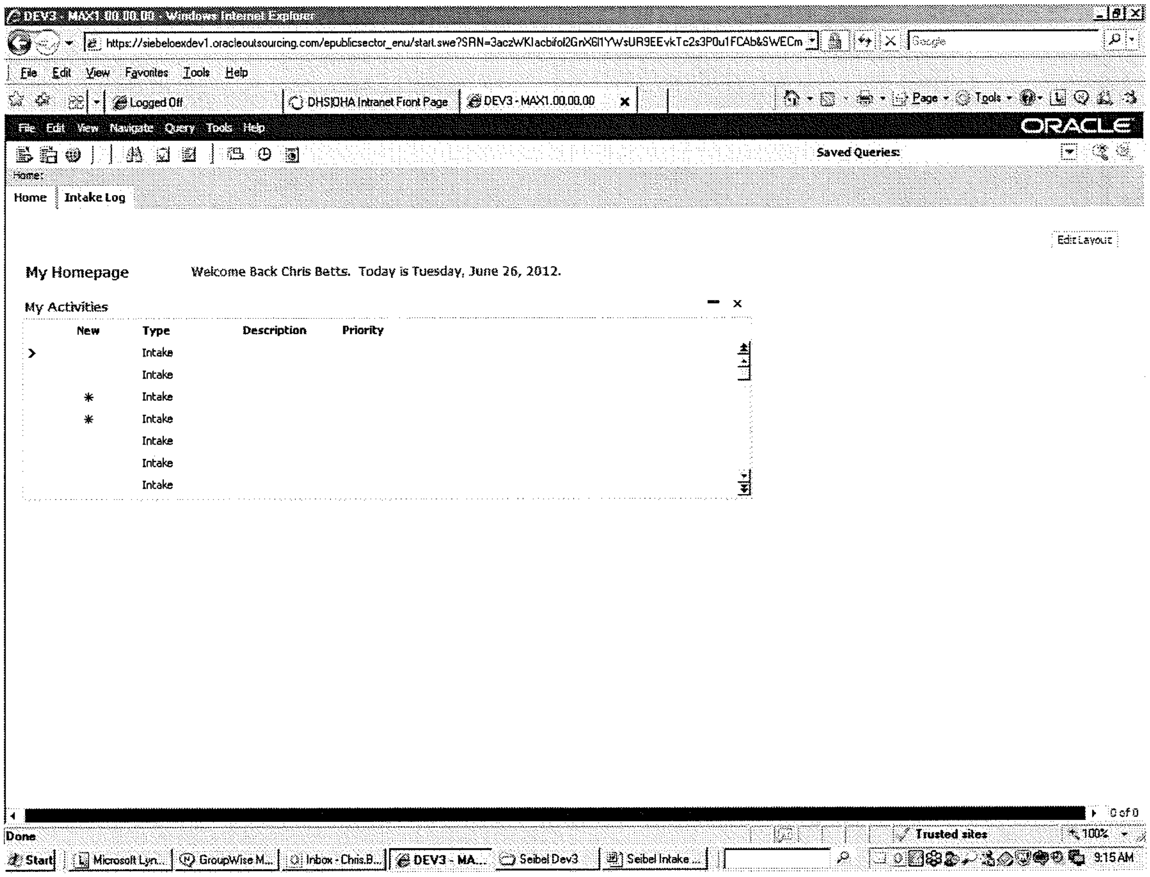
Emergency Contact Method:
Assignment Skills
New
Query
No Records
Skill
Comments

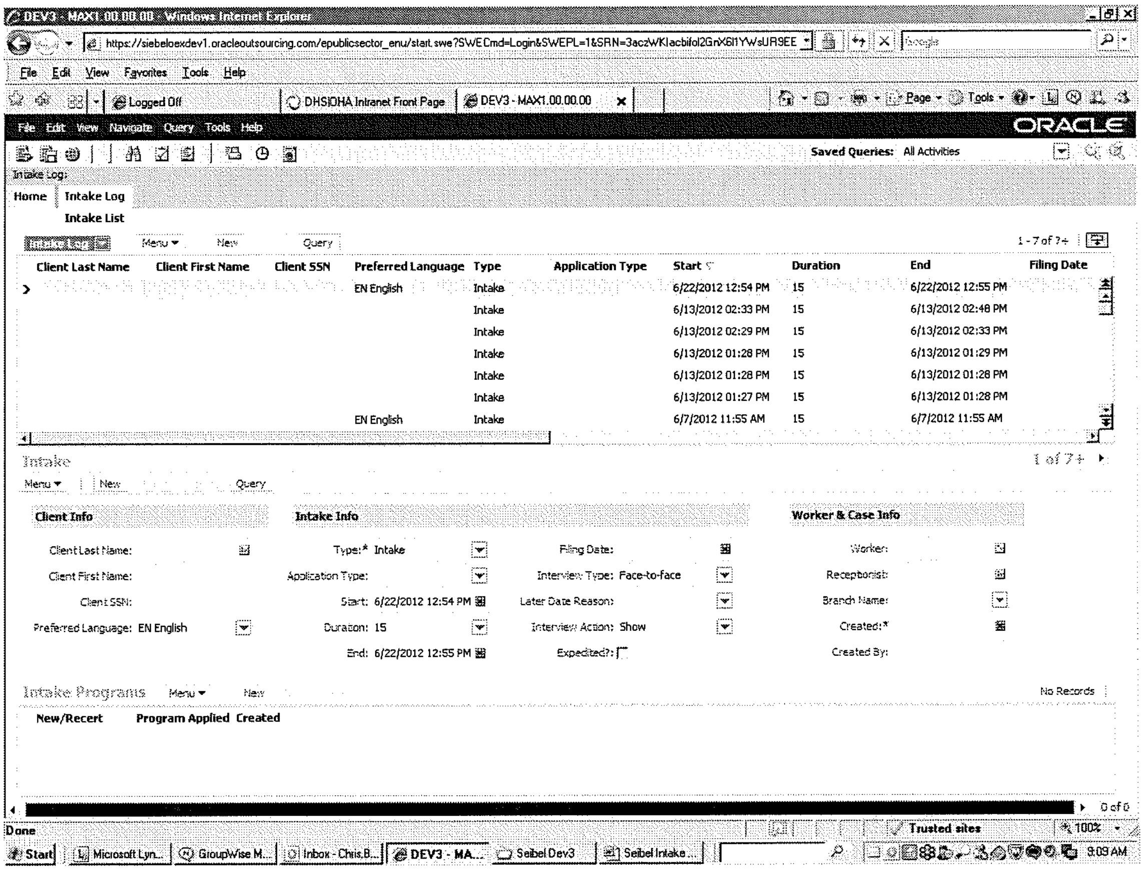


Step 3 <u>Open the viewer</u> – Click on the "Intake Log" tab to open the Intake Log viewer

<u>The Intake Log Screen</u>

First, you will see across the top 1/3 or so of the page the list of contacts saved in the database. This panel is labeled "**Intake List**". Everyone who has ever put data in or had their information entered in the log will be on this list – you only need to add new names once. If the client's name is not in the list of contacts, click on the "New" button at the top left of the contacts panel and a dialogue box will appear. Enter the client's first and last name in the "New" dialogue box.

The Intake panel is divided into 3 areas; Client Info, Intake Info and Worker & Case Info →



The middle panel labeled "**Intake**" is the data entry area of the screen. This is where you will enter the intake appointment information just as in previous versions of the intake log. The Intake panel is divided into 3 areas; Client Info, Intake Info and Worker & Case Info

The panel labeled "**Intake Programs**" on the bottom portion of the screen shows the programs the client plans to apply for at this appointment.

Notice under Client Info the "Type" is pre-set to "Intake" you will not be able to change that in release 1.

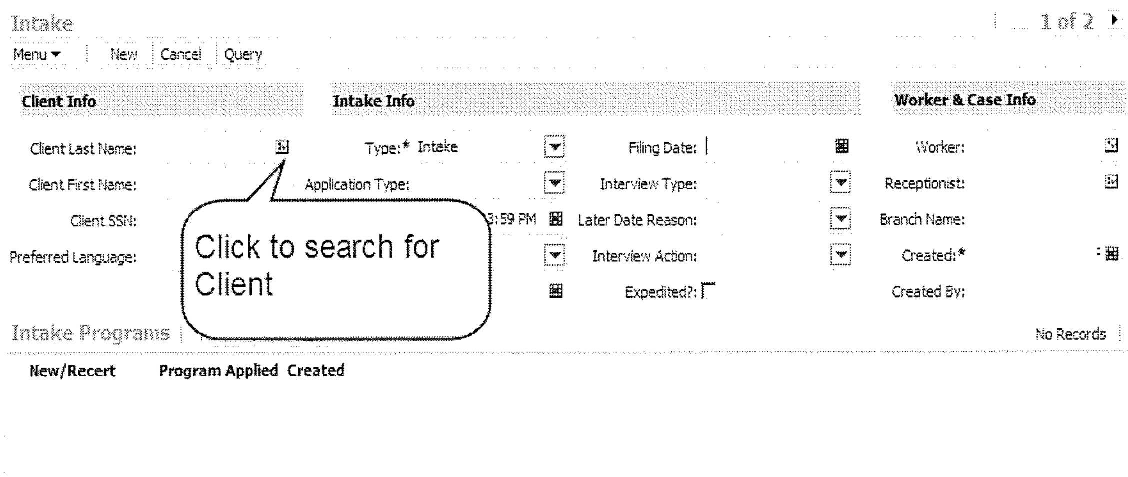
Client Info

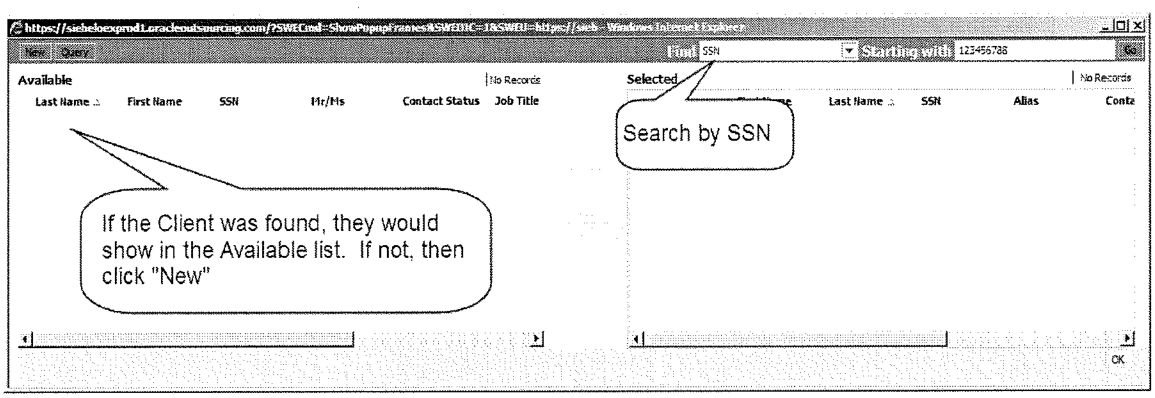
Step 5 Client Last Name / Client First Name– Siebel stores you, your clients and anyone else who uses or is recorded in it as contacts in a single table. Once you have entered someone's intake data, that person's data is kept until it is deleted.

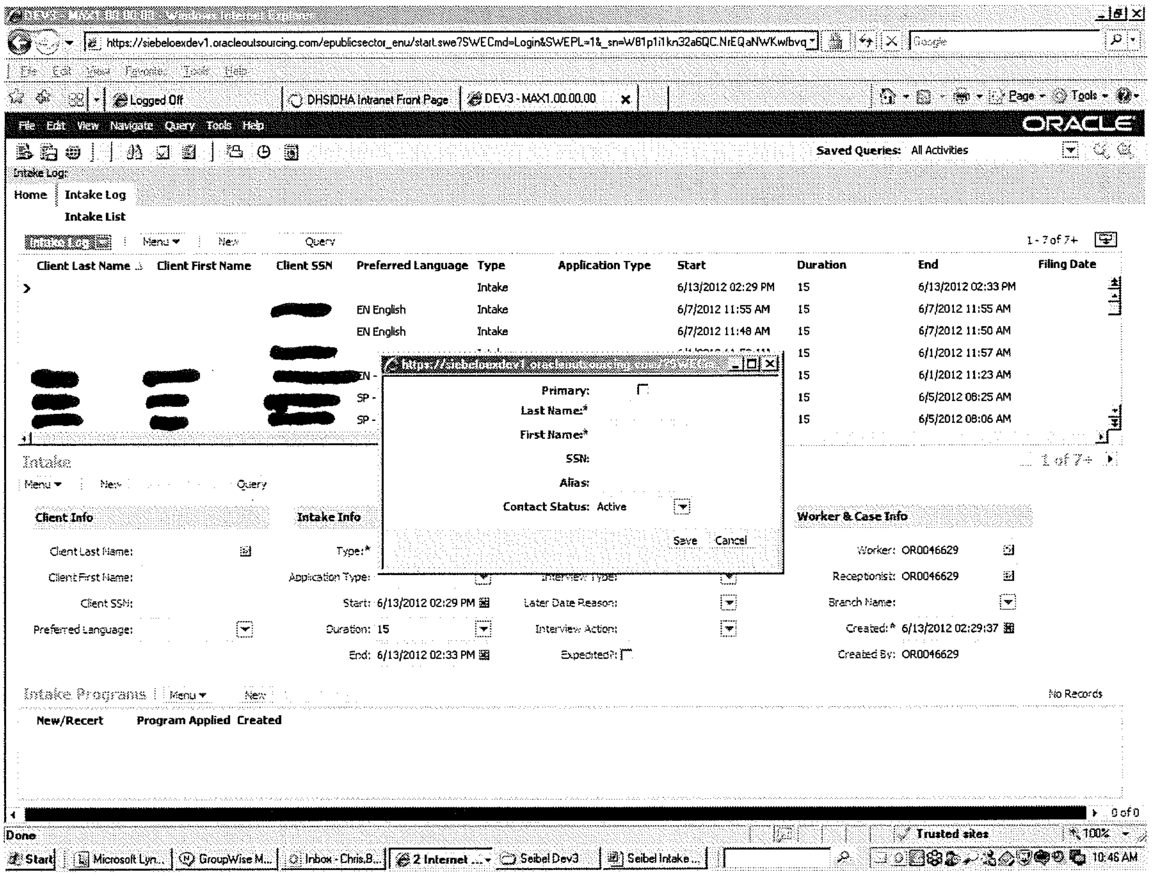
Search by SSN first!

You may also locate your client in the contacts list, click on the little icon inside the Client Last Name field. Search for the client by SSN and click on their name to select it then click [Add] to insert their person data into the new Intake Log record.

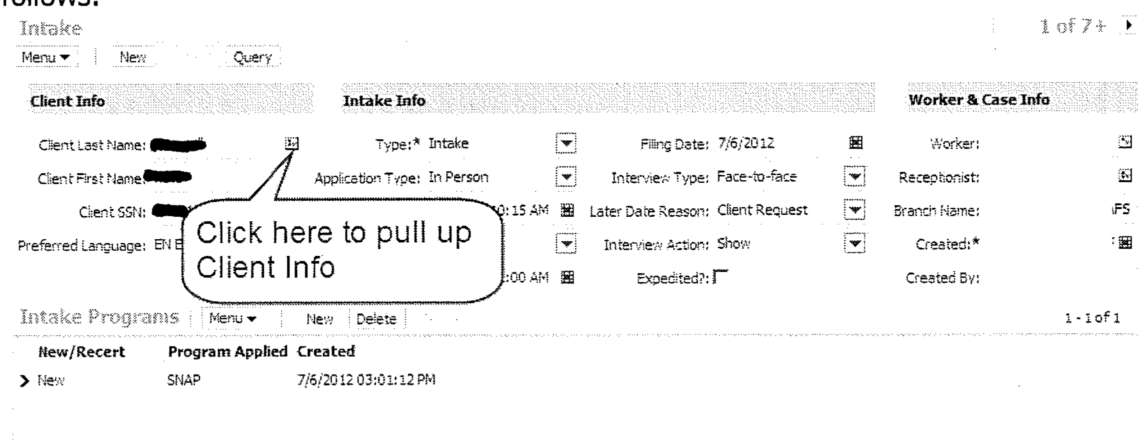
If the person's name is not in the database, click on the [New] button and a dialogue box will open allowing you to insert First Name, Last Name, Alias and Contact Status (select customer).

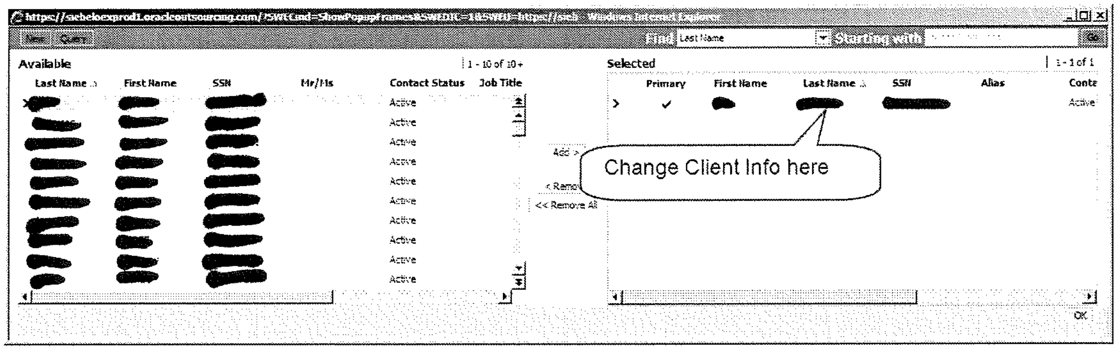






Step 5a Change Client Info – Client info can be changed in the "Selected" box, as follows:





Step 6 <u>Client SSN</u> – SSN will auto-fill after the client is selected for the Intake.

Step 7 <u>Preferred Language</u> – You must select the client's preferred spoken language from the "Preferred Language" drop-down selector.

<u>Intake Info</u>

Step 8 <u>Type</u> – This will default to Intake and cannot change at this time.

Step 9 <u>Application Type</u> – Select "CAPI", "EDMS", "E-mail", "FAX", "In-person" or "Mail" from the drop-down selector. You may type "C", "ED", "E-", "F", "I", or "M" and press Tab.

Step 10 <u>Start</u> – Click on the little calendar symbol inside the Appointment Date cell and select the client's Appointment Date and Interview Time.
You may also type in the date and time (e.g. mm/dd/yy hh:mm)

Step 11 <u>Duration</u> This will be how long the intake should last-

Duration Guide:

- 30 minutes - 1 program, no income
- 45 minutes - 1 program, income
- 60 minutes - 2 programs
- 75 minutes - 3 programs
- 105 minutes – DV
- 75 minutes (Non-mandatory)
- 105 minutes - TANF - Mandatory

(Note: in branches piloting for the "SNAP No Interview Demonstration Project" these times may be different)

Step 12 <u>End</u> This is the time the Intake is scheduled to end. (e.g. mm/dd/yy hh:mm)

Step 13 <u>Filing Date</u> – This is the date the application was received. (e.g. mm/dd)

Step 14 Interview Type - Choose "Face-to-face" or "Phone" from the drop-down selector. You may type "F" or "P" and press tab.

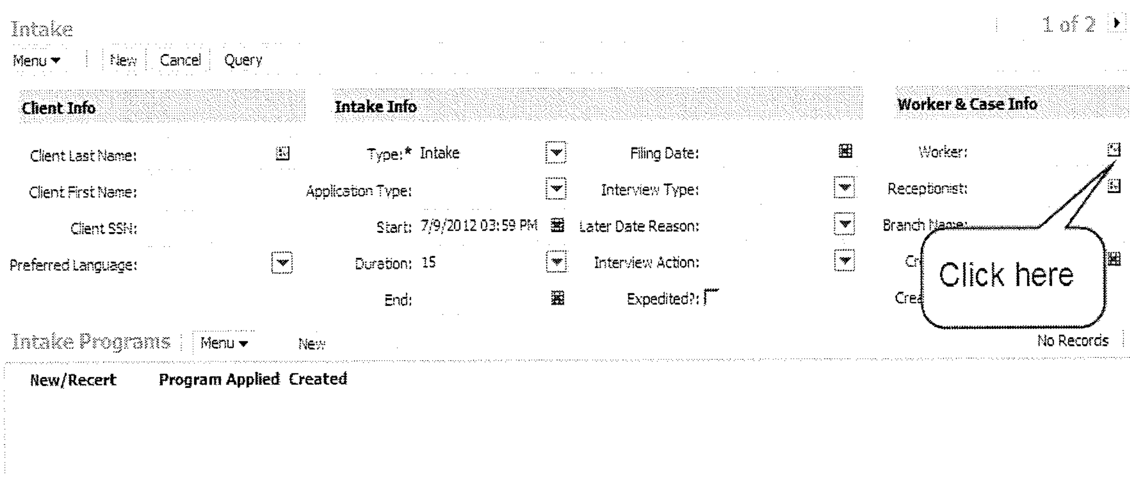
Step 15 Interview Action – After the client's scheduled interview day, update this field by selecting "Canceled", "No-show", "Rescheduled" or "Show" from the drop-down selector. To select from the drop-down you may type the first letter (Case sensitive – Upper Case) then press [Tab].

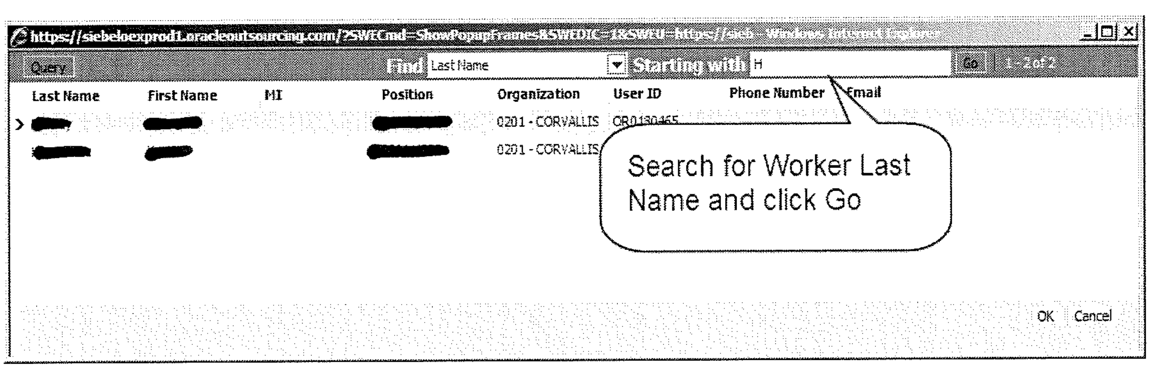
Step 16 Later Date Reason – Select either "Branch request" or "Client request" or "Same Day/Next Day" as appropriate from the drop-down selector. You may type "B", "C", or "S" and press tab.

Step 17 Expedited? If this intake is for an expedited benefit application, check this box.

Worker & Case Info

Step 18 Worker: This field will be auto-populated with the worker ID# of the person who is logged in. To select a worker for the intake, click on the little icon inside the Worker field.





Step 19 Branch Number – Auto-populates

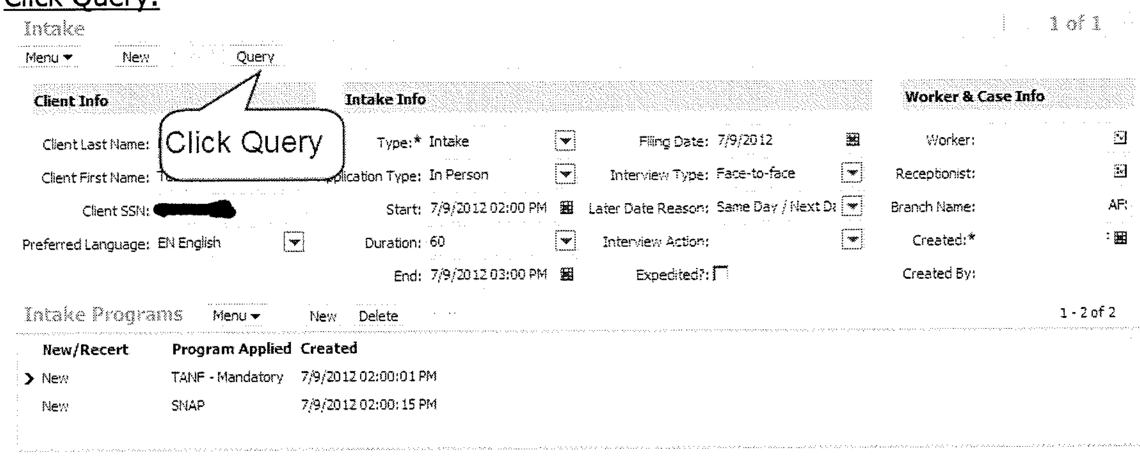
Step 20 Created: This field should be auto-populated with the date the record you are viewing was created.

Step 21 Created by: This field should be auto-populated with the ID# of the person who entered the data for this record (usually "Receptionist").

How to build queries (for reporting or looking up information)

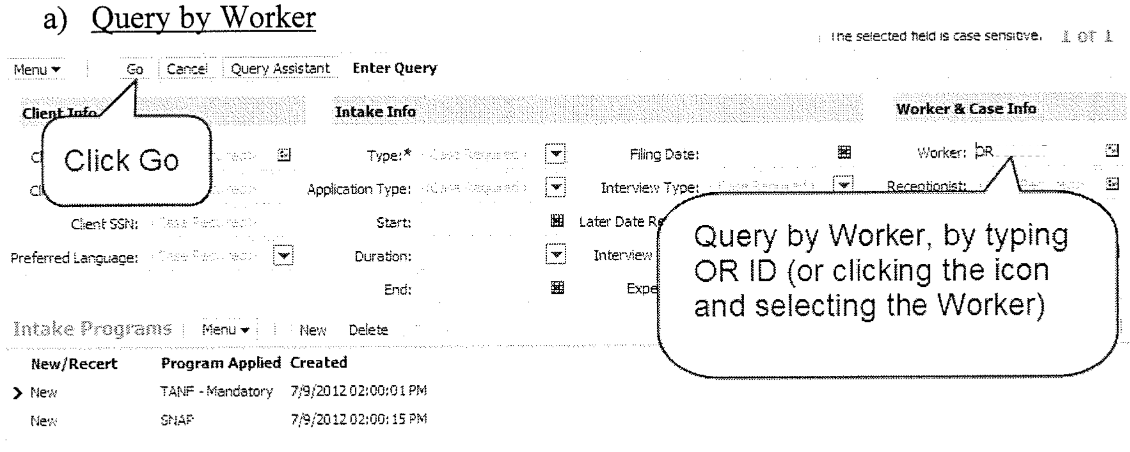
To query for an existing Intake, you can click "Query" and search by Name, Appointment Date / Time, Worker, etc. Follow these steps to perform a query:

Click Query:

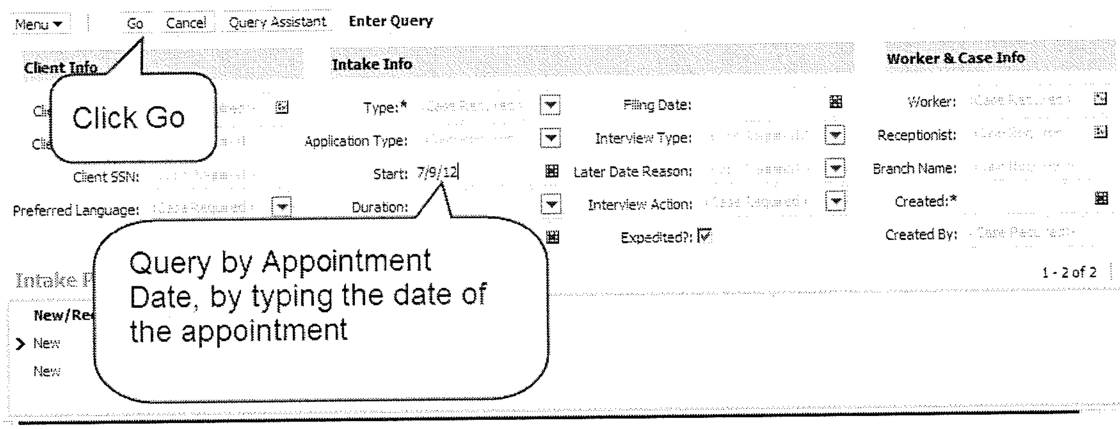


Type the Query Information, and click Go. The following are just three examples of the various queries that can be perfomed:

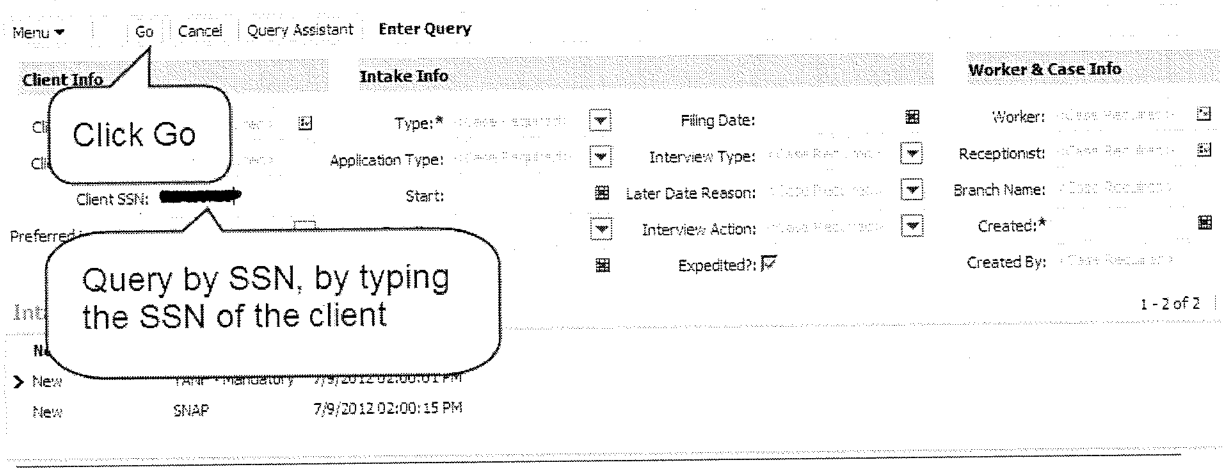
a) Query by Worker



b) <u>Query by Appointment Date</u>



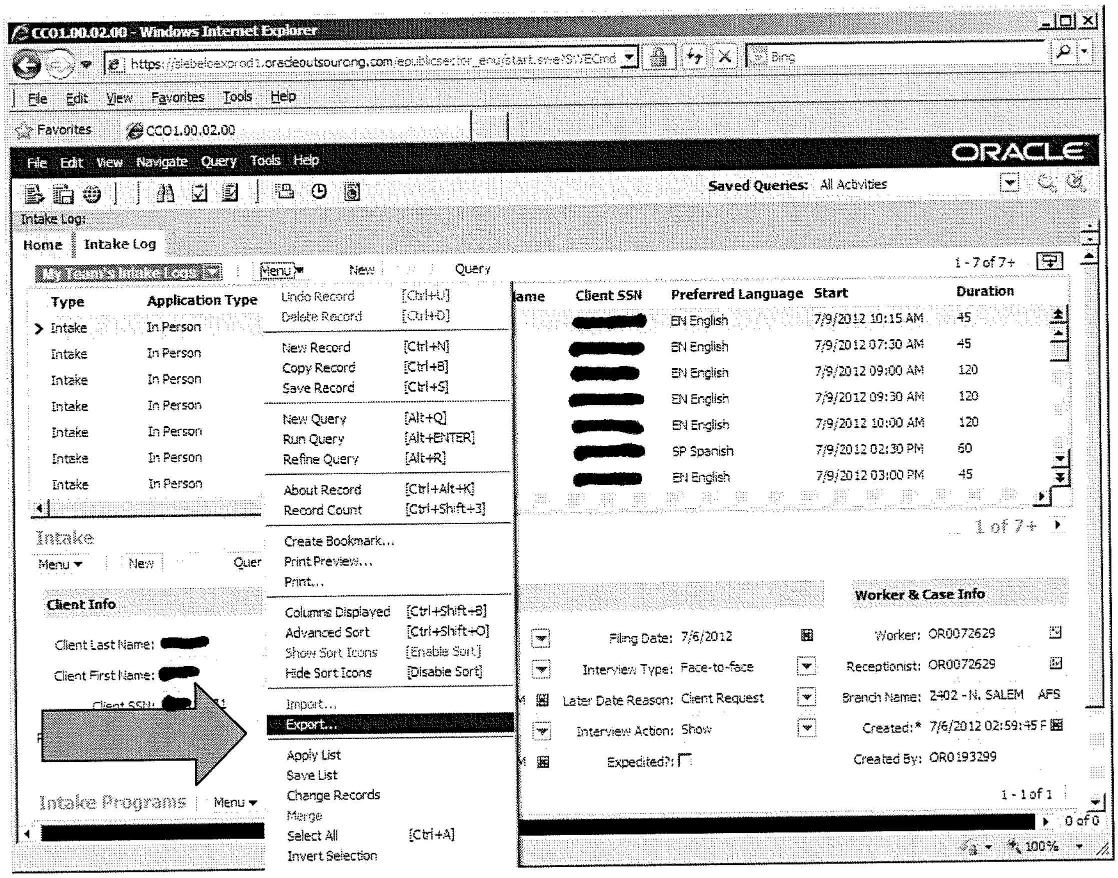
c) <u>Query by Client SSN</u>



Export to Excel
Follow these steps to export information to Excel:

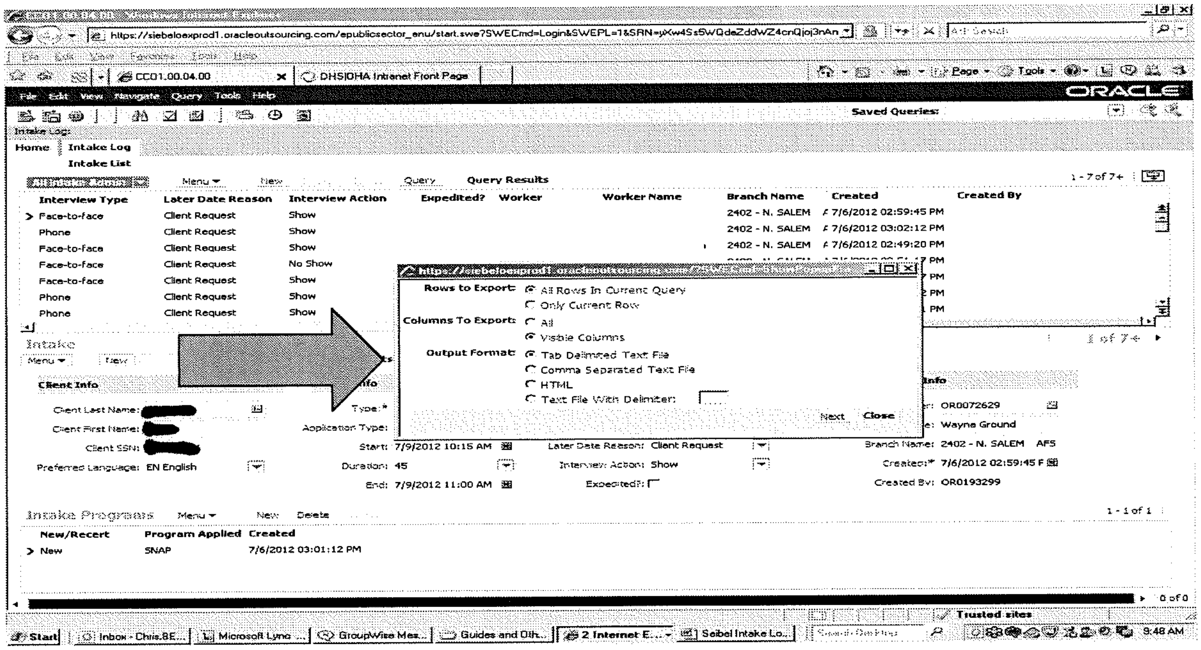
a) <u>Query for any intake records you would like to export to Excel</u>

b) <u>Click **Menu**, and select Export:</u>



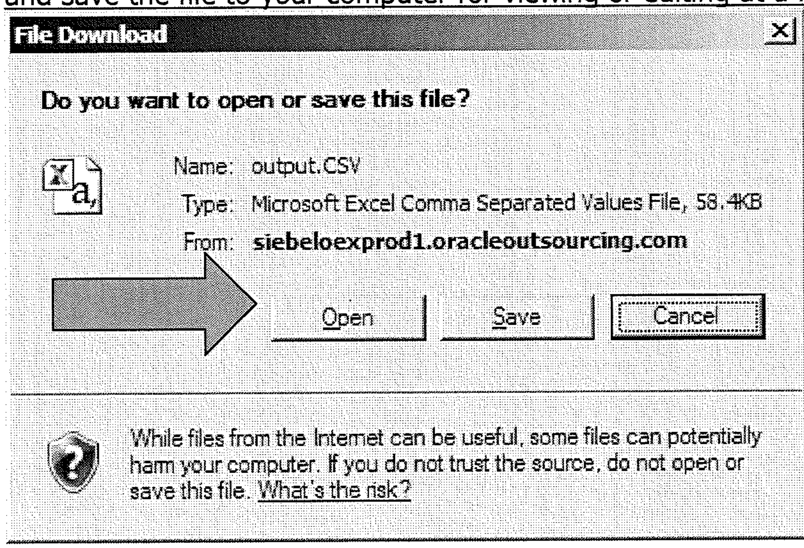
c) Use the default settings:

- All Rows in Current Query,
- Visible Columns,
- Tab Delimted Text File



Click [Next]

d) You will then see a File Download dialogue box:
(You may either click [Open] to view/edit the file before you save it, or click [Save] and save the file to your computer for viewing or editing at a later time.)



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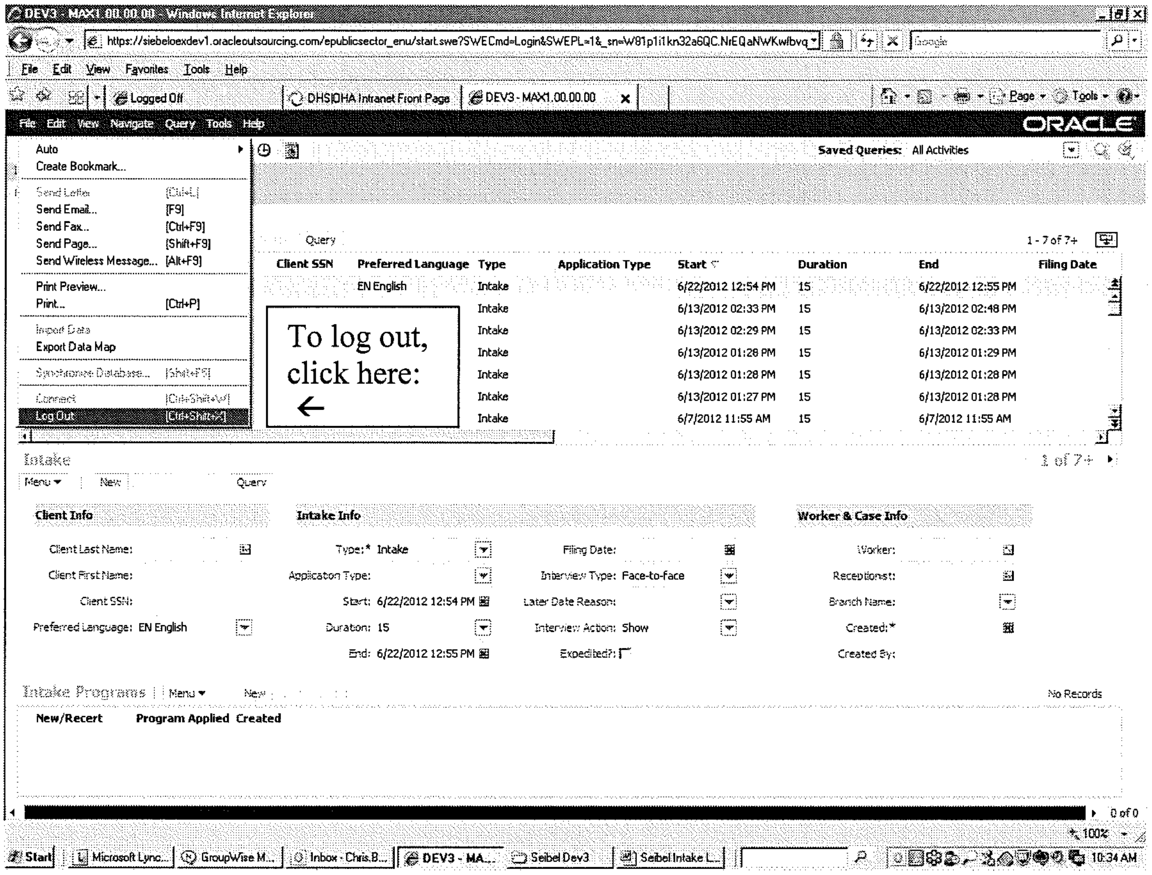
Log Out – To log out of the Intake Log Application go up to the Oracle Tool Bar and click [File] then select "Log Out" from the drop-down selector.



Technical Issues

If you have any technical issues, questions or problems with the new Intake Log, please call the DHS Service Desk at 503-945-5623. The Service Desk technician will direct your call to the person who can help you resolve the issue.

Helpful Tips and Best Practices

- Be sure to enter all intakes from the day before
- Do not attempt to open more than one Siebel session at a time
- When using the auto-complete feature in the drop-down selectors, or queries to find information, **always be sure to use Upper case letters** when typing the first letter of what you're looking for then press [Tab].
- Be sure to click "File" then "Save" after completing each intake.