

Tips for using the Siebel/DHS SSP Intake Log for the No Interview Pilot

The screenshot shows the Siebel/DHS SSP Intake Log interface. At the top, there is a table with columns for Intake, In Person, Channel Partner, Guest, SSN, Language, Filing Date, Duration, and other details. Below the table, there are three main sections: Client Info, Intake Info, and Worker & Case Info. The Client Info section includes fields for Client Last Name, Client First Name, Client SSN, and Preferred Language. The Intake Info section includes fields for Type, Application Type, Start, End, Duration, Interview Type, Later Date Reason, and Interview Action. The Worker & Case Info section includes fields for Worker, Worker Name, Branch Name, Created, and Created By. Below these sections, there is an Intake Programs table and a SNAP No Interview Demonstration section with various checkboxes.

Numbered callouts in the screenshot indicate the following fields and checkboxes:

- 1: Client Last Name, Client First Name, Client SSN, Preferred Language
- 2: Application Type
- 3: Start, End, Duration
- 4: Type
- 5: Interview Type, Later Date Reason, Interview Action
- 6: Expedited? checkbox
- 7: Assets/Resources, Earned Income, Expenses, Information about the household, Information for Other Programs or Services, Primary information about household members, Unearned Income checkboxes

1. Enter Client's last name, first name, SSN and preferred language (from drop-down)
2. Choose app type: CAPI (C), EDMS (ED), Email (E), FAX (F), In-person (I), Mail (M)
3. If no interview is conducted leave blank: start/end date/time and duration
- 3a. If an interview takes place due to client request, fill in start/end time and duration of intake (3) and worker ID (3a)
4. Enter filing date
5. Interview type, Later date reason, and Interview Action: Leave blank
6. Check box if "Expedited"
7. Only check box(s) if worker had to contact client by phone to gather more information