



SSIS

Intake Searches

July 2024



For accessible formats of this information or assistance with additional equal access to human services, write to dhs.ssishelp@state.mn.us, call 651-431-4801, or use your preferred relay service.

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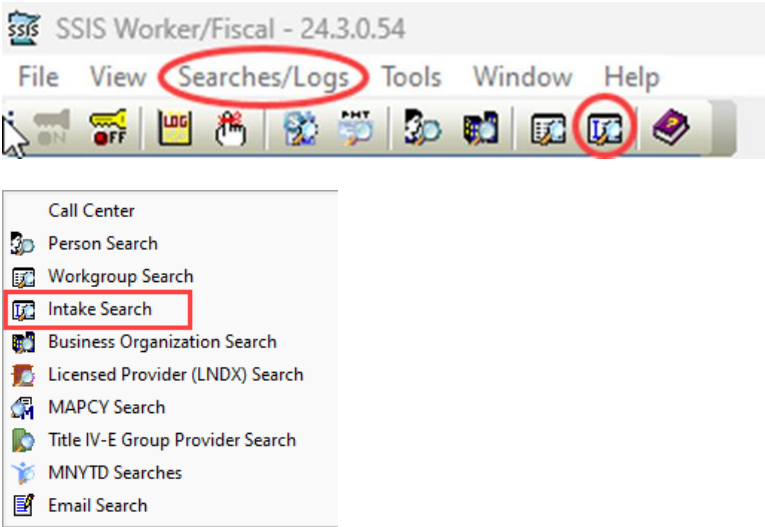
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Intake Searches

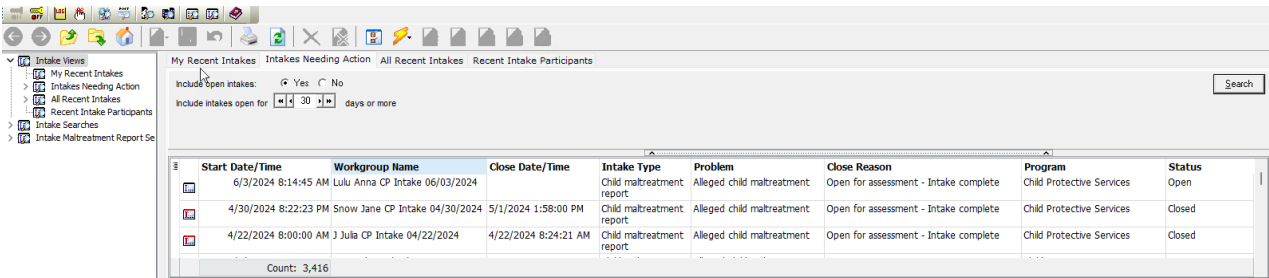
Intake workgroups are accessed through an Intake Search. Intake Search includes searching from an Intake Views node, searching from an Intake Searches node, or searching from an Intake Maltreatment Report Searches node. When Intake Searches is accessed, it defaults to Intake Views.

To Access Intake Views

Select **Intake Searches** from Searches and Logs on the Windows toolbar or click the quick add button on the Application toolbar seen below.



Intake Views



There are four Intake Views which can be accessed from tabs or on the Intake Views node, or on separate nodes underneath:

- My Recent Intakes- Displays only the intakes created by the user signed into the system within the number of days indicated in the Include field.

- **Intakes needing action-** Displays Intake workgroups needing action: all open intakes; closed intakes that require association with an existing workgroup or creation of a new assessment or case management workgroup because of the Close Reason that was selected. These are intakes created by any worker within the number of days entered into the Include field. The open intakes can be excluded by selecting **NO** in the Include open intakes field.
- **All Recent Intakes-** Displays Intake workgroups made by all workers within the number of days entered into the Include field. Both open and closed intakes display in the search results
- **Recent Intake Participants-** Displays all clients recently connected to an Intake workgroup for all intakes created in your agency within the number of days indicated in the Include field.

Intake Views Grid

The Closed intakes that need action are indicated by a red icon. Red icons mean that either there is:

- A Close reason of Open for assessment/Case Management – Intake complete and the Assessment workgroup has not been opened.
Or
- A Close reason of Refer to current workgroup – Intake complete and the Intake workgroup has not been referred or associated to another workgroup.

Closed intakes that are complete (do not need further action), and open intakes are indicated by a blue icon. Blue icons mean:

- The Intake workgroups does not have a Close Date/Time entered (e.g., it does not have a disposition). These are unfinished Intake workgroups.
Or
- The Intake workgroup is closed and has been resolved (not needing further action).

Intake Searches

Intake searches allow the worker to access more search criteria to locate specific Intake workgroups. The Intake Searches node contains three search options:

- **Intake Main Search-** Locates any type of Intake workgroup and has more specific search fields to locate a specific Intake workgroup or specific types of Intake workgroups. For instance, if looking for an Intake workgroup taken by a specific worker yesterday, adjust the date range to Yesterday and select the worker's name in the Worker field.
- **Intake Person Search-** Locates Intake workgroups based on the associated clients or collaterals. Searching by the SSIS Person # returns only the Intake workgroups involving that

specific person. The name search uses a Starts With search mechanism allowing a partial first or last name to be entered, when the complete name is not known.

- **Unassigned Intake Searches-** Locates Intake workgroups that do not have an assigned worker. For example, an unassigned intake can exist when a worker ends their assignment on a workgroup – and does not reassign it – leaving the workgroup unassigned. This search ensures that Intake workgroups do not get overlooked.

Unassigned Intake Search is also used to search for Adult Protection Intakes and Child Maltreatment Reports workgroups that are transferred electronically from another county or from MAARC. Child Maltreatment Reports and Adult Maltreatment Reports can be transferred to another county electronically if that county is determined to have jurisdiction to investigate. Therefore, it is important for staff to check this search to ensure that no reports are not overlooked.

For all searches listed you do not need to run the search to save it. Once you've entered the name, anytime you come back to the search screen, you can use the drop-down to select it. You can also change any criteria after selecting it without affecting the original saved search. To delete a search, select it from the drop-down, right click on it, then select "Delete". You cannot edit searches once you've created them; you would have to delete it, then create a new one. Searches can be saved and used later without having to remember and re-enter the search criteria. In addition, multiple searched can be saved as well.

When the search parameters are adjusted using the arrows or free typing into the Include field, the Search button must be clicked for new results to display.

The single arrows in the Include field increase or decrease the value by one while the double arrows change the value by 10. The maximum number is 1000.

The "Search on open" check box means that SSIS will run the search immediately when you select the search. For this search, the check mark is there by default, meaning that SSIS will run the search each time you select it from the Tree View.

All the searches run the same, the difference is the information that is needed for the specific search. That information will change for each of the different kinds of search.

Intake Maltreatment Report Search

The Intake Maltreatment Report Searches node includes:

- **Adult Maltreatment Main Search-** Searches only for Intake workgroups in which an Adult

Maltreatment Report is attached. The search criteria in the right-hand column represents fields specific to the Adult Maltreatment Report.

- Child Maltreatment Main Search- Searches only for Intake workgroups in which a Child Maltreatment Report is attached. The search criteria in the right-hand column represents fields specific to the Child Maltreatment Report.
- Child Maltreatment Victim/Offender Search- Searches for clients who have been entered as either an offender or a victim of a Child Maltreatment Report of an Intake workgroup. This search has no date range option, so it will search all Intake workgroups in which the client was entered as the alleged victim or offender. Use the Description field if a description was entered for the alleged victim or offender in the allegation when a name is not known.

To Access Intake Maltreatment Report search:

Select the **Intake Maltreatment Report Search** node in the Tree View.

The screenshot displays the 'Intake Maltreatment Report Search' interface. On the left, a tree view shows the navigation structure, with 'Intake Maltreatment Report Searches' selected. The main window is titled 'Adult Maltreatment Main Search' and contains several search and filter options. At the top, there is a 'Searches:' dropdown, 'Max results: 100', and a 'Search on open' checkbox. Below these are date range options: 'Date range', 'Date Type: Start Date Within', 'Date Range: 1 Month History', and 'From: 05/27/2024 To: 06/27/2024'. The bottom section contains various filters: 'Workgroup', 'SSIS Workgroup #', 'Program', 'Close Reason', 'Status', 'Worker', 'Report status', 'Imminent danger: Yes No', 'Agency WG #', 'Call center report #', 'License #/Health Facility #', and checkboxes for 'Active workers only' and 'No Secondary Workers'.

Adult Maltreatment Main Search

Adult Maltreatment Main Search searches only for Intake workgroups that have an adult maltreatment report (AMR) attached. Adult protection intakes and maltreatment reports are received electronically from the Minnesota Adult Abuse Reporting Center (MAARC) and should always include a maltreatment report.

When Adult Maltreatment Main Search tab is selected. There are fields for “Search” and “Max Results” at the top of the screen and a checkbox labeled “Search on open”. There is an area with a drop-down for the date range, with boxes for “From” and “To”. Clicking in either of these boxes will open a date picker.

Child Maltreatment Main Search

The Child Maltreatment Main Search searches only for Intake workgroups that have a child maltreatment report attached. Search criteria needed will represent fields specific to a child maltreatment report.

Child Maltreatment Victim/Offender Search

The Child Maltreatment Victim/Offender Search searches for clients that have been entered as either an alleged victim or alleged offender in allegations within a child maltreatment report of an Intake workgroup. This search has no date range option, so it will search all Intake workgroups where a client has been entered as an alleged victim or offender.