## Intake and Child Maltreatment Report Outline

### Screen Shot

#### Toolbar – Intake Search Button

- Click on the **Intake Search** button in the toolbar to display the **Intake Search** window.

#### New Intake Workgroup Button

- Click the **New Intake Workgroup** button.
- If the button doesn’t display, ensure **Intake Views** is selected in the Tree View, and click the **Refresh** button.

#### Intake Detail Section

- Complete the **Detail** section fields with the exception of the **Caller** field.
- Click **Save** to enable the magnifying glass in the **Caller** field.
- It may be easier to search for **Existing** (or **Add New**) **Clients** or **Collaterals** using the Quick Add buttons at the top of the screen: **Add New** or **Existing Client** or **Add New** or **Existing Collateral**.

#### Enter New or Existing Clients and Collaterals

- When adding a client or collateral, either as a **Participant** or as **Caller** (reporter), always select **Add Existing** to first search the **SWNDX** database for participant.
- If there are no search results, select **Add New**.

#### Identification Section – Description Field

- After adding clients to **Intake**, **Refresh** the screen and click in the **Description** field below the Identification section.
- All client names display in the **Description** field once added to **Intake**. Select a name in the **Description** field to title the Intake.
### Screen Shot

#### Detail Section – Caller Field

- Click the **Caller** field below the **Detail** section and select Caller’s name.
- Select **Anonymous**, if applicable.

#### Additional Information Section

- **Description of Need Tab**
  - Complete the **Description of Need** tab by entering the immediate concerns identified by a caller.
  - Consider not naming caller in the text to ensure data privacy.
  - Click the **E** button to open a separate window to enter text.

- **Comments Tab**
  - Complete the **Comments** tab by entering historical information regarding a family (such as prior services or treatment).
  - Check **State Detail** and indicate whether additional data exists.
  - Indicate screened out reasons, date, and with whom decisions were made. Cite statute or maltreatment screening guidelines, as applicable.

- **Staff Warning Tab**
  - Complete the **Staff Warning** tab, as warranted.
  - Enter safety concerns relative to staff contact with the family or other related issues.
  - Concerns may be as indicated by the reporter, law enforcement, or as historically known to the agency.

#### Client Node Fields

- If possible, enter the **Primary Language**, **Interpreter**, **Marital Status**, and **Qualifies under ICWA** fields during **Intake** to assist caseworkers when contacting a family with special needs.
- These entries are always editable as circumstances warrant.
### Screen Shot

#### Client - Address/Phone/Email/State Detail Folder

- [Anna Michelle Schmidt](#)
  - Address/Phone/Email/State Detail
    - Physical location
    - Cell
    - Home
    - State Detail

**Note the location to check STATE DETAIL!**

#### Collateral - Address/Phone and Employment

- Professional Collaterals are searchable only within an agency (once ‘Cleared,’ clients are searchable statewide).

#### Client - Name/Race

- [Anna Michelle Schmidt](#)
  - Name/Race
    - Current legal name - Anna Schmidt
    - Nickname - Annie Schmidt
    - Caucasian
    - American Indian/Alaskan Native - Unknown tribe

**The First, Middle and Last Name on the Client node screen must be the Legal name; enter any other names in the Name folder.**

- Each Race is entered as it becomes known.
- Entering an Indian Race also requires entry of Tribe and Tribal Enrollment Status; enter Unknown if not yet known.
- Each tribe is a separate entry.

#### Client - Relationship

- [Anna Michelle Schmidt](#)
  - Relationship
    - Anna Michelle Schmidt's Birth Father is Andrew Schmidt
    - Anna Michelle Schmidt's Birth Mother is Virginia Ann Schmidt
    - Anna Michelle Schmidt's Brother is Luke Bjorn Schmidt
    - Anna Michelle Schmidt's Other non-relative is Tribal Social Worker
    - Anna Michelle Schmidt's Guardian ad litem is Evie Garfield
    - Anna Michelle Schmidt's Parent's partner is Dafven Novo

**Enter all Relationships as soon as possible.**

- All Relationships print on the Police Report Summary, provide copy features in SSIS, and assist assigned caseworkers when contacting a family.
- Many Relationship entries are non-familial, such as guardian ad litem and parent’s partner.

### Navigation Steps

- Enter client **Address**, **Phone**, and **Email**, as applicable.
- Never delete older entries; enter an **End Date** or a **Comment**.
- Ideally, enter a **Physical location** for each client; multiple addresses and phone numbers should be entered, as applicable.

- **Address, Phone and Email** information is also entered for **Collateral Participants**.
- Searching and associating an **Employment** selection to a Collateral changes that **Participant** to a **Professional Collateral** in SSIS.
### Screen Shot

#### Client - Disability/Diagnosis/Substance 1

- If known, enter **Professionally Determined Disabilities** below the corresponding tab.
- The Disabilities checkboxes remain editable and should change as circumstances warrant.
- This information is useful when first contacting a family.

**Note:** If this information is not reflected here, and a child later becomes a ward of the state, it can create problems when trying to establish adoption assistance.

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<th>Diagnosis</th>
<th>Professionally Determined Disabilities</th>
</tr>
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<tbody>
<tr>
<td>0</td>
<td>1</td>
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#### Client - Disability/Diagnosis/Substance 2

- **Substance Involvement Tracking** entry is required in Family Assessment, Family Investigation, and Child Protection Case Management Workgroups; it may be used in other Workgroups by agency choice.
- If child maltreatment is being reported, and a report alleges substance involvement, it may be noted during Intake and later edited, as applicable.
- **Note** the Prenatal exposure selection to indicate concerns for the welfare of an unborn child.

#### Client - Health/Insurance

- Any reported health concerns should be reflected as soon as they are known as a New Other Health entry below the Health/Insurance folder; entries are always editable.
- Individual Providers specific to a client should also be added here.
- Enter private Insurance.
- Medications or Checkups can be entered as soon as known.
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<tr>
<th>Screen Shot</th>
<th>Navigation Steps</th>
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| **New Child Maltreatment Report Button** | • Click on the Child Maltreatment Report button in the toolbar to add it to the Intake.  
• The Child Maltreatment Report contains Allegations and Initial Notifications subfolders. |

| **Report - Identification Section** | • Indicate whether a report alleges Imminent danger to alleged victims. If so, immediate response is required. |

| **Report - Status Section** | • Select the Report status in the corresponding field.  
• Even if screening out a report, first select Screened in and complete data entry.  
• To Close a report, return to this field and change the selection. |

| **Report – Classification Section** | • Select a Report track below the Classification section.  
• Selecting Family Investigation requires that an Investigation reason be selected.  
• 24 hr response req’d |

| **Report – Reporter Section** | • Select reporter name below the Reporter section.  
• Indicate Reporter detail and whether a reporter is Mandated or Voluntary. |

| **Allegations Folder – Allegation Section** | • Click the Allegations subfolder.  
• Enter each Alleged victim, Alleged perpetrator, Relationship, and Date of all allegations. Enter description if name not known.  
• Allegations can be separately appealed so must be separately entered.  
• Click Save after each entry. |
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| **Allegation Folder – Allegation Detail** | • Clicking the word **Allegation** opens SSISWORK help in a new window with statute definitions.  
• Select one or more **Allegation details**, as applicable, by clicking in the corresponding check box. |
| ![Allegation screenshot](image) | |
| **Initial Notifications Folder and Screen** | • Complete the **Initial Notification**, entering as many as applicable.  
• Enter **Agency notified**, the **Date**, **Method**, and (if known) **Person notified**.  
• Be certain to send a **Notification** to law enforcement, even if it was the reporter; it needs to know the agency’s screening results. |
| ![Initial Notification screenshot](image) | |
| **Intake – Disposition/Close Section** | • Enter a **Close Reason** and **Close Date and Time** on **Intake**.  
• If **Screened in**, the **Intake** is closed but the **Child Maltreatment Report** is open and needs assignment to:  
  - Family Assessment (FA)  
  - Facility Investigation, or  
  - Family Investigation (FI). |
| ![Intake screenshot](image) | |
| **Police Report – Child Protection Summary** | • Right-click on the **Child Maltreatment Report** node below **Intake** and select **Print**.  
• Print or email a report by selecting **Police Report – Child Protection Summary**.  
• Note the last page is a **Fax Cover Sheet** to request background on all alleged perpetrators.  
• Note that **Current and Prior Child Protection Activity** is in the **Action** menu. |
| ![Police Report screenshot](image) | |
| **Tree View – Red Unassigned Intake** | • Once an **Intake** with a child maltreatment report is closed, it displays as **red** in the Tree View.  
• Once a child maltreatment report is assigned, the **Intake** displays again as **blue**. |
| ![Tree View screenshot](image) | |

- **Intakes** copy into all opened Workgroups beneath the **Associated Workgroups** folder.
When *screening out* a child maltreatment report, many of the same steps are required:

- New **Intake** screen; select **Intake type – Alleged Child Maltreatment**
- Add **Participants**; clients and professional collaterals, as applicable
- Complete the **Description of Needs**, and **Staff Warning** tabs
- Enter the reason, date, and with whom a screening decision is made in the **Comments** tab.
- Open the **Child Maltreatment Report**
- Complete the **Allegations** screens – one per **Alleged Victim** and **Alleged Perpetrator**
- Complete an **Initial Notification** and enter data on the corresponding screen; a screened out child maltreatment report is still cross-reported to law enforcement.

*Note:* Reports of child neglect or abuse must be screened within 24 hours of being received by an agency or its representative, including weekends and holidays.

*Note:* If ‘screened out’ is only entered on the Intake screen, and not additionally on an **Open Child Maltreatment Report** screen, only an Intake is screened out, not a report of child abuse or neglect.

- Return to the **Child Maltreatment Report** screen and in the **Report Status** field, change the automatic **Screened in** selection to **Screened out**.
- Complete the **End reason**, **End date**, and **Number of alleged victims’** fields.
- Select **Screened out maltreatment report** in the **Close Reason** field of **Intake**.
- Enter the **Date** and **Time** reflecting closing both the **Child Maltreatment Report** as screened out, as well as the associated **Intake**.
After Intake Assignment: Case and Workgroup Definitions

**Case:**
- Recommend one case per household.
- Contains family information.
- Typically labeled under the female head of household (followed by male, then oldest child).

**Workgroup:**
- Contains at least one client, assigned to one caseworker, receiving services in at least one program area.
- May have several workgroups in a case.
- Contains individual client information.

If clients were provided services in a prior case, opening the new **Workgroup** in the older **Case** makes all prior case history available. Assigned workers can view prior case notes, service plans, and related documentation to ensure provision of more accurate and global case management. Individual agencies decide how to open Cases and Workgroups.

After Intake Assignment: One Case and Multiple Workgroups

**Typically one per Individual or Family**

**Workgroups**
- May be in one or more different program area regarding one or more clients in the same case.
- Child Welfare
- Developmental Disabilities
- Adult Mental Health
- Elderly Waiver
Ideally, open one Case per family, and add all associated Workgroups within that Case (including opening a closed case to add a new open Workgroup). This makes all case file history available to each primary and secondary worker assigned.

Selecting **Open With Case in New Window** opens one Case with all its associated Workgroups in its own window. This permits the **Case Details** folder to display, which has enhanced copy features. Closing the **My Caseload** window while working within one specific case may help computers to run more quickly.