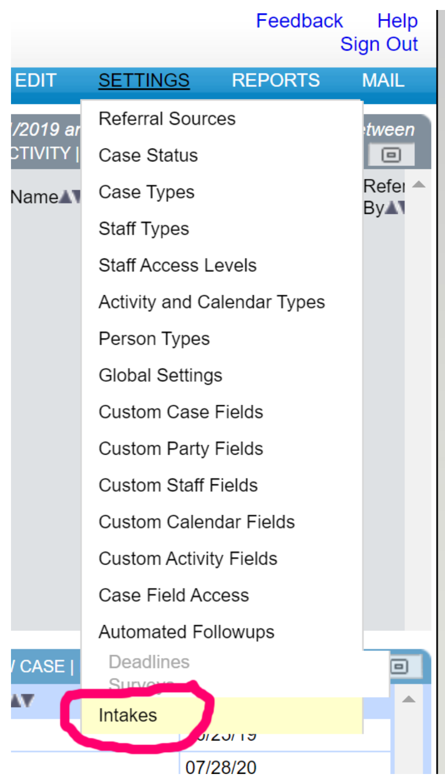
New Caseload Manager Feature: Online Intake Forms

An Intake Form is a public-facing form that, once approved, can create cases with parties, responding party records, or staff records. Once a form is filled out, an email or text notice is received by the designated staff person, who can then make any desired changes and must approve the form for it to get added into the system.

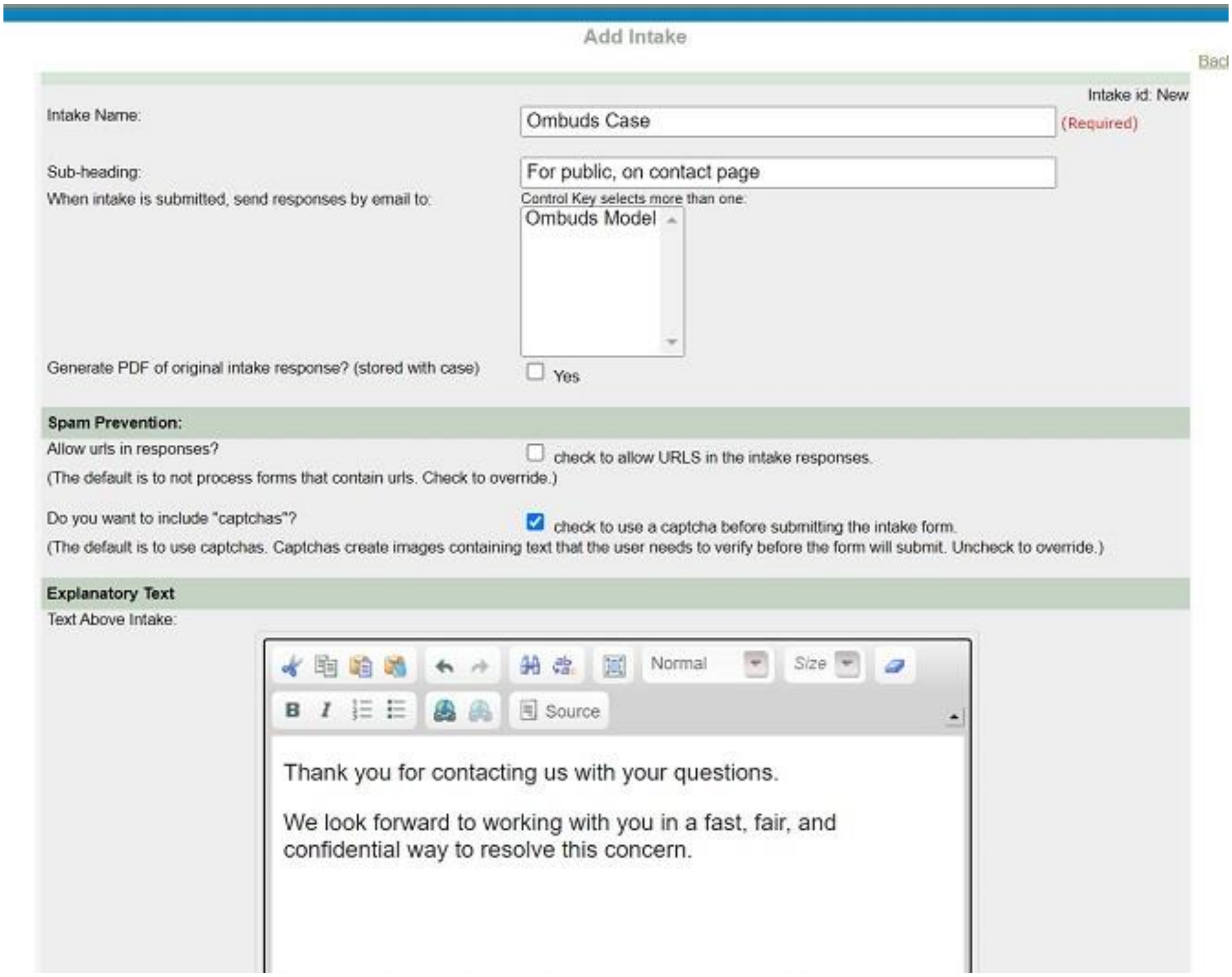


Case Intakes

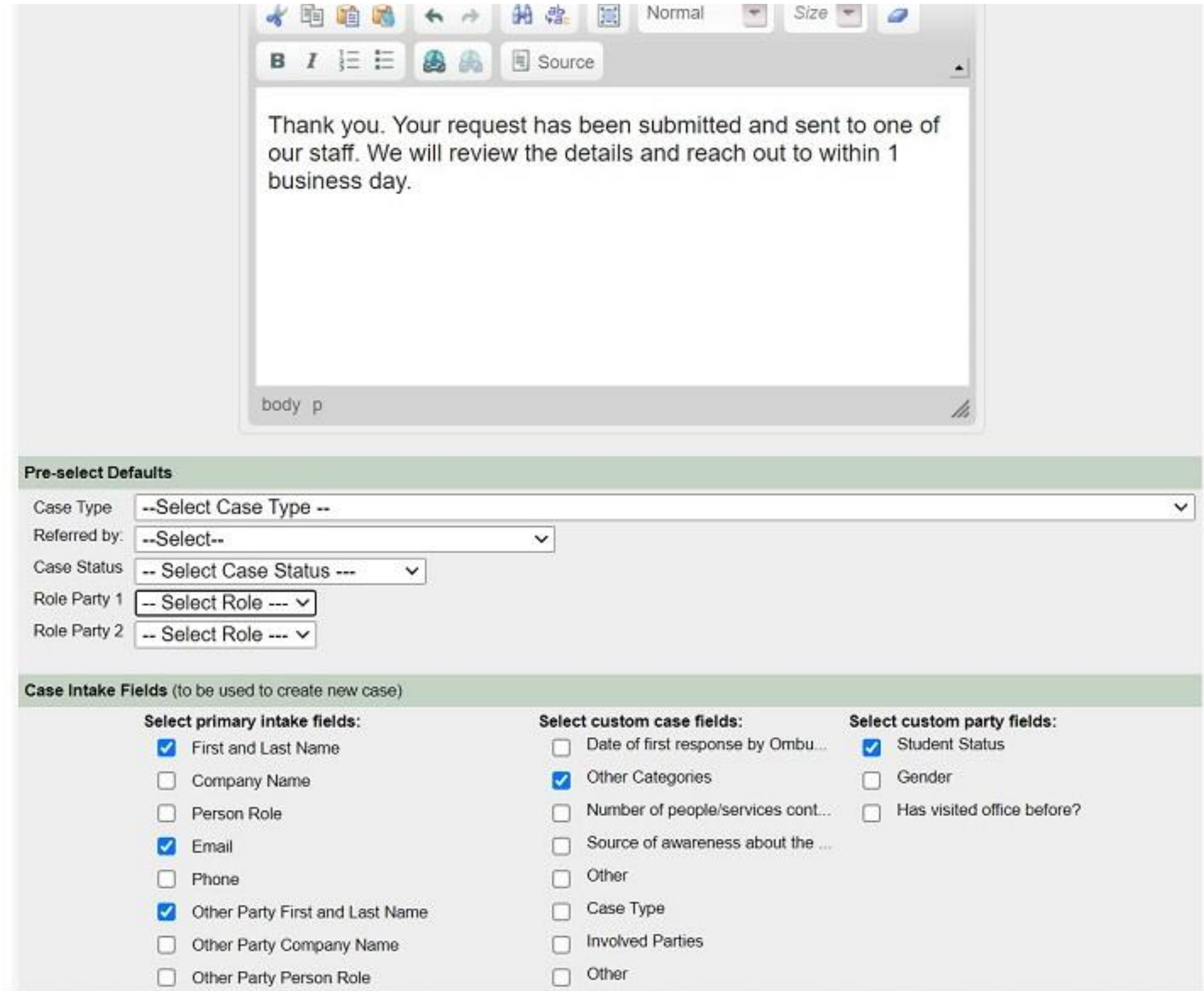
To create a Case Intake Form, you will need to create a new form in your SETTINGS, then place that link on your website. When people fill out that intake form, the CM Admin will be able to approve and edit the details. Then a new Case and Party Records will be created based off of the intake form.

1) Go to SETTINGS, click on Intake.

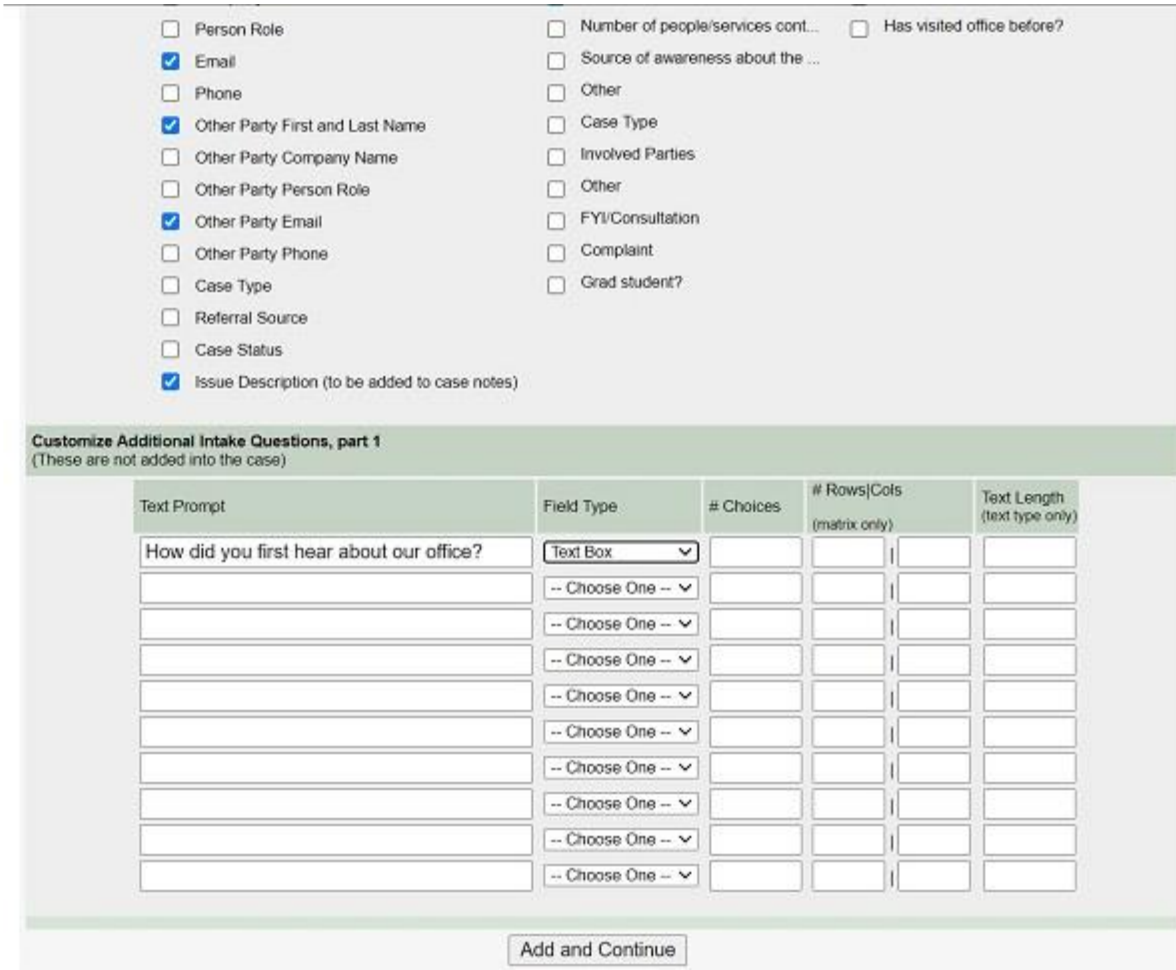
2) Click "Add Intake for Person+Case", and begin filling out the fields.



3) Select the fields you want to include in the intake.



4) Add in new fields that you need to include in your intake form.



5) You may reword any titles for fields so they make more sense to the public.

6) You will see a link for your intake.

7) You can then place that link on your website.

8) When people click on this link they can fill out the intake.

Ombuds Case

For public, on contact page

Thank you for contacting us with your questions.

We look forward to working with you in a fast, fair, and confidential way to resolve this concern.

Name: Ashley | Hill

Email: ahill@uoregon1.edu

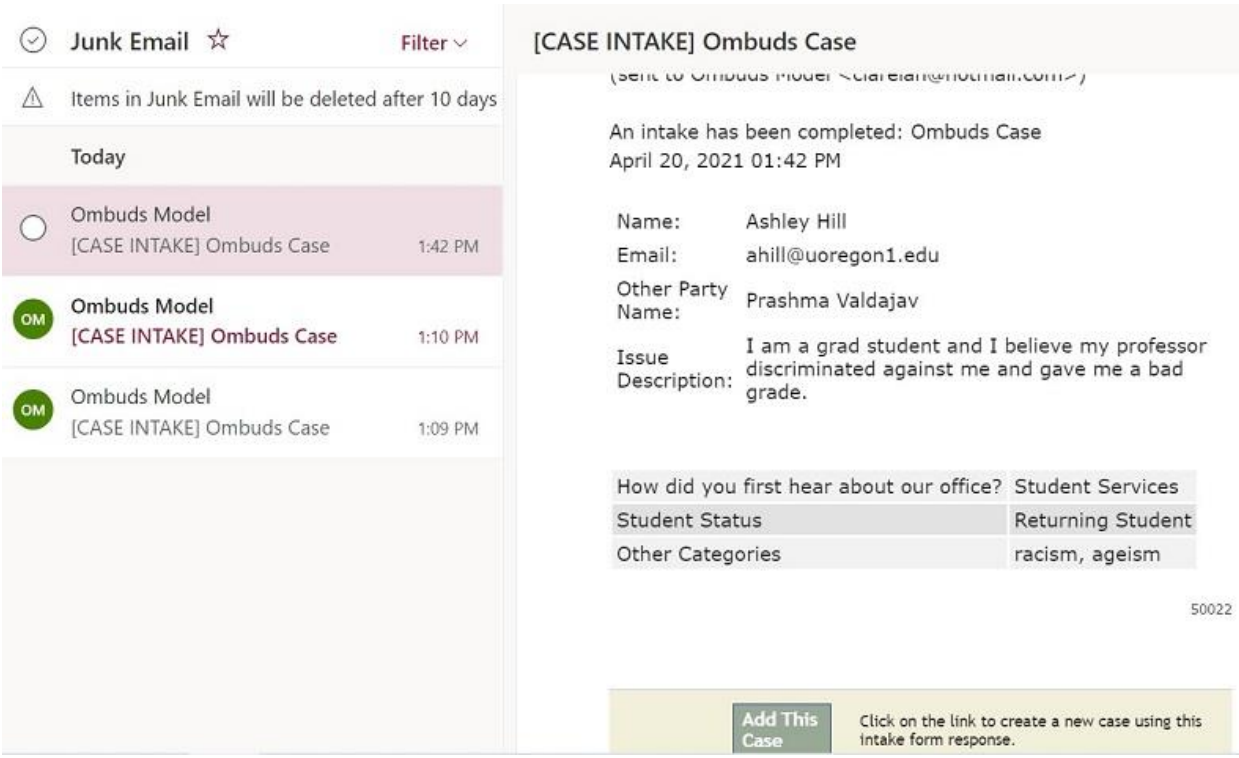
Other Party Name: Prashma | Valdajav

Can you give a brief description of what is going on?

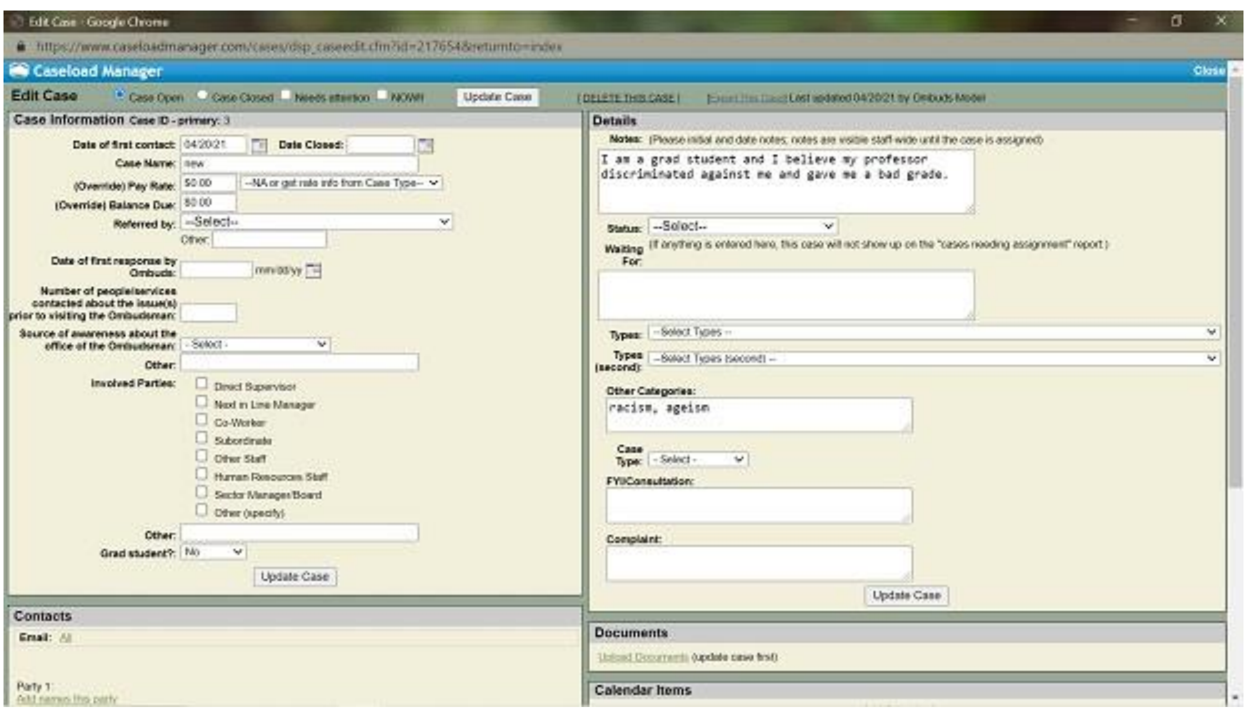
I am a grad student and I believe my professor has unfairly discriminated against me and has given me a bad gr

What are your main concerns?

9) Then the details of the intake will go to email designated in the intake form set-up page. (Be aware that this email might appear in your Junk/Spam Mail Folder.)



10) You may then approve the case, make any edits needed, and you now have a new case in Caseload Manager.



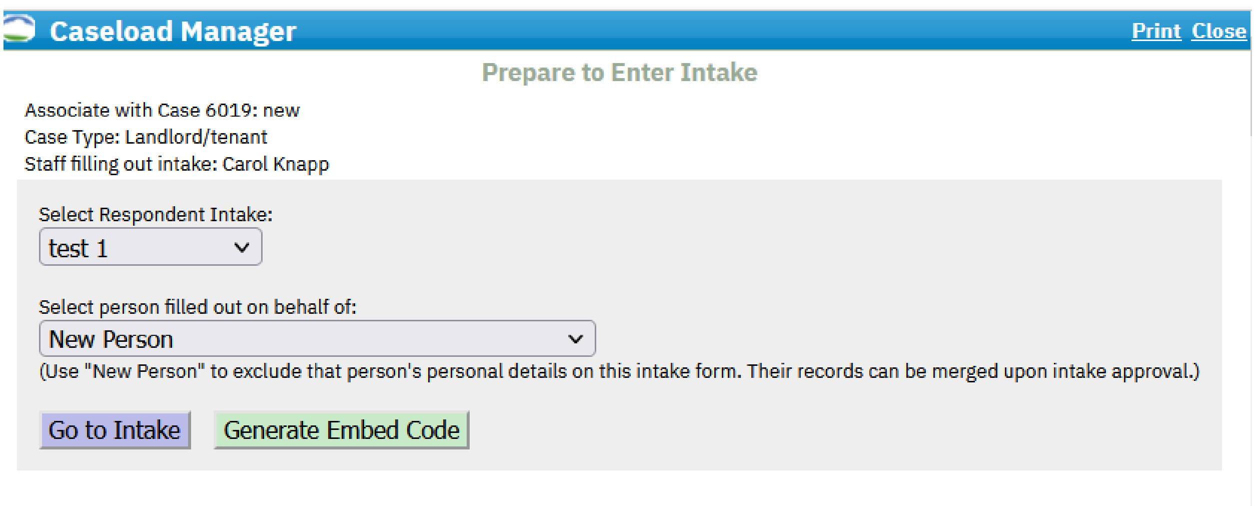
Responding Party Intakes

To set up a Responding Party Intake, go to Settings > Intakes, and click on "Add Intake for Responding Party". You may notice there are no case-associated questions. Only party-related fields are available to be included.

A Responding Party Intake must be associated with a pre-existing case before the form can be filled out, so the page link must be sent to your responding party directly rather than through a link on your website. This is necessary so the person data on this can be associated with the correct case.

The form can be used to either add a new person into the system, or, if there is a matching email address, to add or update demographic details to an existing record.

Links to fill out a Responding Party Intake can be found inside the case edit screen, in the Contacts section under "Fill out party intake".



Staff Intakes

A Staff Intake can be used to facilitate adding new staff records. It can be useful for adding volunteers or potential panelists. The link to this intake can be added to your website as with Case Intakes.

To set up a Staff Intake, go to Settings > Intakes, and click on "Add Intake for Staff Only".