



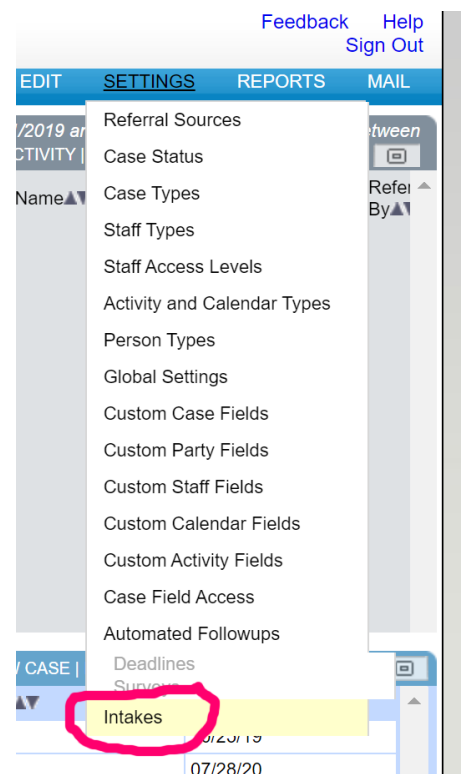
New Caseload Manager Feature: Online Intake Forms

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.

Add Intake

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Intake Name: Intake id: New
(Required)

Sub-heading:

When intake is submitted, send responses by email to:

Generate PDF of original intake response? (stored with case) Yes

Spam Prevention:

Allow urls in responses? check to allow URLs in the intake responses.
(The default is to not process forms that contain urls. Check to override.)

Do you want to include "captchas"? check to use a captcha before submitting the intake form.
(The default is to use captchas. Captchas create images containing text that the user needs to verify before the form will submit. Uncheck to override.)

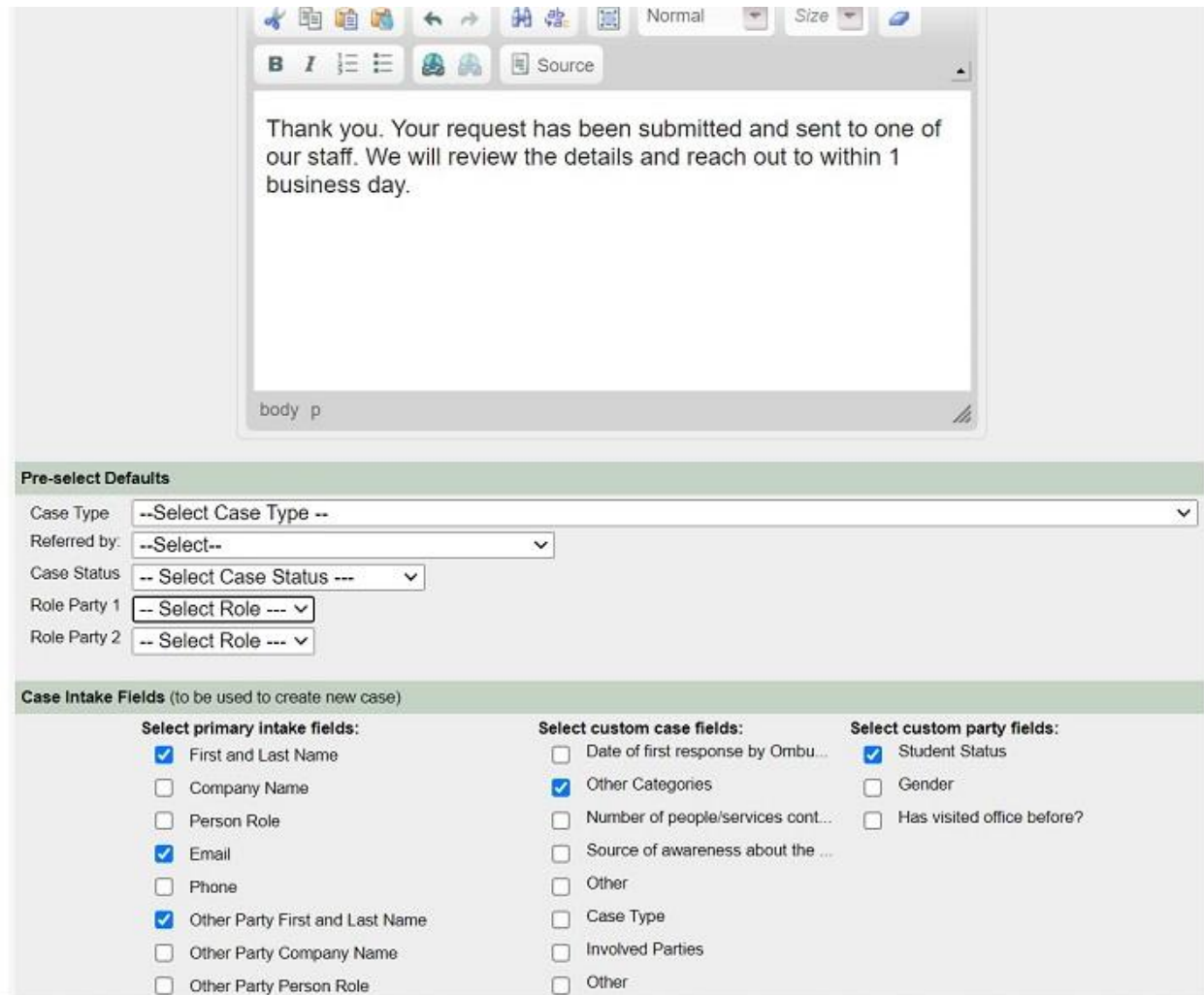
Explanatory Text

Text Above Intake:

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.

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



The image shows a web interface with a message box at the top and configuration options below. The message box contains the text: "Thank you. Your request has been submitted and sent to one of our staff. We will review the details and reach out to within 1 business day." Below the message box is a section titled "Pre-select Defaults" with several dropdown menus: "Case Type" (set to "--Select Case Type --"), "Referred by:" (set to "--Select--"), "Case Status" (set to "-- Select Case Status ---"), "Role Party 1" (set to "-- Select Role ---"), and "Role Party 2" (set to "-- Select Role ---"). Below this is a section titled "Case Intake Fields (to be used to create new case)" with three columns of checkboxes:

Select primary intake fields:	Select custom case fields:	Select custom party fields:
<input checked="" type="checkbox"/> First and Last Name	<input type="checkbox"/> Date of first response by Ombu...	<input checked="" type="checkbox"/> Student Status
<input type="checkbox"/> Company Name	<input checked="" type="checkbox"/> Other Categories	<input type="checkbox"/> Gender
<input type="checkbox"/> Person Role	<input type="checkbox"/> Number of people/services cont...	<input type="checkbox"/> Has visited office before?
<input checked="" type="checkbox"/> Email	<input type="checkbox"/> Source of awareness about the ...	
<input type="checkbox"/> Phone	<input type="checkbox"/> Other	
<input checked="" type="checkbox"/> Other Party First and Last Name	<input type="checkbox"/> Case Type	
<input type="checkbox"/> Other Party Company Name	<input type="checkbox"/> Involved Parties	
<input type="checkbox"/> Other Party Person Role	<input type="checkbox"/> Other	

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

Person Role

Email

Phone

Other Party First and Last Name

Other Party Company Name

Other Party Person Role

Other Party Email

Other Party Phone

Case Type

Referral Source

Case Status

Issue Description (to be added to case notes)

Number of people/services cont...

Source of awareness about the ...

Other

Case Type

Involved Parties

Other

FYI/Consultation

Complaint

Grad student?

Has visited office before?

Customize Additional Intake Questions, part 1
(These are not added into the case)

Text Prompt	Field Type	# Choices	# Rows\Cols <small>(matrix only)</small>	Text Length <small>(text type only)</small>
How did you first hear about our office?	Text Box			
	-- Choose One --			
	-- Choose One --			
	-- Choose One --			
	-- Choose One --			
	-- Choose One --			
	-- Choose One --			
	-- Choose One --			
	-- Choose One --			
	-- Choose One --			
	-- Choose One --			

Add and Continue

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

Manage Intake

Rephrase fields as needed for the public-facing intake form. Set required fields, and sort

Case/Party/Other Field	Rephrase for Intake (if needed)	Required?	Sort order (number)
Name		<input type="checkbox"/>	10
Email		<input type="checkbox"/>	20
Other Party Name		<input type="checkbox"/>	30
Other Party Email		<input type="checkbox"/>	40
Issue Description	Can you give a brief description of what is going on?	<input type="checkbox"/>	50
Other Categories	What are your main concerns?	<input type="checkbox"/>	60
Student Status	Are you an undergrad, grad student, staff, or faculty?	<input type="checkbox"/>	70
How did you first hear about our office?		<input type="checkbox"/>	80

6) You will see a link for your intake.

Intakes
Details have been updated for Intake: Ombuds Case

ID	Intake Title (click on link for report)	Date Added	Intake Page
1	Ombuds Case	04/19/21	https://www.caseloan.com/cases/intake.cfm?tbl=CsOPR04

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.)

The screenshot shows an email interface. On the left is a 'Junk Email' folder containing three entries from 'Ombuds Model' with subject lines '[CASE INTAKE] Ombuds Case'. The main content area displays the details of the selected email, titled '[CASE INTAKE] Ombuds Case'. The email body contains the following information:

- Name:** Ashley Hill
- Email:** ahill@uoregon1.edu
- Other Party Name:** Prashma Valdajav
- Issue Description:** I am a grad student and I believe my professor discriminated against me and gave me a bad grade.

Below the email body is a table with the following data:

How did you first hear about our office?	Student Services
Student Status	Returning Student
Other Categories	racism, ageism

At the bottom right of the email content, the number '50022' is visible. Below the email content is a button labeled 'Add This Case' with a subtext: 'Click on the link to create a new case using this intake form response.'

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

The screenshot shows the 'Edit Case' page in the Caseload Manager web application. The page is divided into several sections:

- Case Information:** Includes fields for 'Date of first contact' (04/20/21), 'Date Closed', 'Case Name' (new), '(Override) Pay Rate' (\$0.00), '(Override) Balance Due' (\$0.00), 'Referred by', 'Date of first response by', 'Number of people/services contacted about the issue(s) prior to visiting the Ombudsman', 'Source of awareness about the office of the Ombudsman', and 'Involved Parties' (checkboxes for Direct Supervisor, Next in Line Manager, Co-Worker, Subordinates, Other Staff, Human Resources Staff, Sector Manager Board, and Other (specify)).
- Details:** Includes a 'Notes' field with the text 'I am a grad student and I believe my professor discriminated against me and gave me a bad grade.', a 'Status' dropdown, a 'Waiting For' field, and 'Types' dropdowns.
- Other Categories:** A text field containing 'racism, ageism'.
- Case Type:** A dropdown menu.
- FYI/Consultation:** A text field.
- Complaint:** A text field.
- Contacts:** A section for 'Party 1' with an email address field.
- Documents:** A section for 'Upload Documents (update case first)'.
- Calendar Items:** A section for scheduling.

Buttons for 'Update Case' are present at the bottom of the 'Case Information' and 'Details' sections.

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".

Caseload Manager [Print](#) [Close](#)

Prepare to Enter Intake

Associate with Case 6019: new
Case Type: Landlord/tenant
Staff filling out intake: Carol Knapp

Select Respondent Intake:
test 1

Select person filled out on behalf of:
New Person

(Use "New Person" to exclude that person's personal details on this intake form. Their records can be merged upon intake approval.)

[Go to Intake](#) [Generate Embed Code](#)

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".