Chapter 12 – Standard Intake
Version 2

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Important

The required fields referenced in this chapter refer to system-required fields. These fields are required in order for the form to be saved in approved status.

The information that is required due to policy may be different from those that are system required.
Person Administration Requirements

Introduction

According to each form, certain fields are required within the Person Administration.

Required Fields for Approved Form Status

Personal Details Page:

Customer **Legal Name** (First and Last Names)

**Date of Birth**

**Gender**

**Ethnic Background**

Address Details Page:

Needs to have the Address Type of **Residence**

**Street**

**City**

**County** - If out of state - use County "ZZ"

**State** - If out of country - use State "ZZ"

**Zip**

**Residence** - Rural or Urban

Saving Form

Each navigational tab (page) must be saved before advancing to the next tab. Once the save is successful the page will automatically forward to the next navigational level tab.
Customer Information Heading

Introduction
The customer heading displays information regarding the selected customer.

<table>
<thead>
<tr>
<th>KAMIS ID: 61731</th>
<th>Name: TEMPLE, ORRIS V.</th>
<th>Organization: Primary 8</th>
<th>Customer Status: ACTIVE</th>
<th>Assessment Nbr: 30000322</th>
<th>more...</th>
</tr>
</thead>
</table>

Additional Information
Clicking on the “more...” link will display a small snapshot of additional customer information, including the address listed in KAMIS.

Field Help

Introduction
If there is notes concerning a field data entry options, the field label will be displayed in a brown text. Click on the label and a help dialog box will be displayed.

If Yes or Pending, Type of Physical Disability:

The following are commonly seen diagnoses that are not considered Physical Disabilities according to the Social Security Administration. These diagnoses by themselves would not qualify an individual for the Physical Disability waiver:

- Dementia
- Alzheimer’s
- Depression
- Schizophrenia
- Any mental health diagnosis
Customer Primary Navigation Tab

 Requirement  Add or update all customer and associate information before you begin.

Main Secondary Navigational Tab

Continued on next page
Customer Primary Navigation Tab, Continued

Required Fields

**Organization (Defaults to Users Organization)**

**Form Status**
- Aborted
- Approved
- Statuses Only to be used by KDADS CARE staff:
  - Approved – Emergency Admission
  - Approved – Less Than 30 Day
  - Approved – Out of State PASRR
  - Approved – Respite Stay
  - Approved – Terminal Illness
  - Dementia Abort
  - Special Abort
  - Terminal Abort
- Incomplete – Follow-Up Needed
- Work In Progress

**Intake Type**

**Intake Relates To** – Only if In-Home Services is selected as Intake Type

**Intake Date**

**Interviewer**

**Intake Source**

**Using 3160 Referral as Intake**

**3160 Referral Date** – Only if 3160 Referral is “Yes”

**File Upload** – Only if 3160 Referral is “Yes”

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**Note**

The form status will automatically be placed in Work in Progress status which will be uneditable until the form is saved. Once the form data entry is completed, then switch the Form Status field will be active.

*Continued on next page*
**Customer Primary Navigation Tab, Continued**

**Demographic Secondary Navigational Tab**

**PD Required Questions Region.**

**Customer’s Current Location**

**Nursing Facility or Hospital Information**

**Admission Information**

**Displays only if PD is selected on “Intake Relates To” question on the Main Navigational Tab**
Customer Primary Navigation Tab, Continued

Required Fields  Does the Customer have a Legal Guardian?
On the Main Secondary Navigational Tab if PD is selected on the Intake Relates to question. The following is required:
  • Has the Customer ever been or is currently on an IDD Waiver or IDD Waiting List?
  • Customer is between the age of 16 and 64?
  • Has Customer applied for or been determined Physically Disabled by the Social Security Administration?
    o If Yes or Pending, Type of Physical Disability if Yes or Pending is selected.

Customer Location if Hospital, Nursing Facility or Other is selected then those fields will need to be completed.

Note  A notice will display if the following questions are answered as indicated below:
  • Yes – Has the Customer ever been or is currently on an IDD Waiver or IDD Waiting List?
    OR
  • No – Customer is between the age of 16 and 64?
    OR
  • No – Has Customer applied for or been determined Physically Disabled by the Social Security Administration?

NOTICE
CUSTOMER NOT ELIGIBLE FOR PD WAIVER ASSESSMENT

Continued on next page
**Functional Assessment Primary Navigation Tab**

**PASSR Secondary Navigational Tab**

![Standard Intake - Version 2](image)

**Required Fields**

No fields displayed on this Page are required.
### Needs / Risk Factors

#### Secondary Navigational Tab

- **Bathing:** [ ]
- **Dressing:** [ ]
- **Eating:** [ ]
- **Laundry/Housekeeping:** [ ]
- **Management of Medication/Treatments:** [ ]
- **Meal Preparation:** [ ]
- **Money Management:** [ ]
- **Shopping:** [ ]
- **Toileting:** [ ]
- **Transfer:** [ ]
- **Transportation:** [ ]
- **Use of Telephone:** [ ]
- **Walking/Mobility:** [ ]

#### Risk Factors - Check If Applicable

- **Animals in or around home:** [ ]
- **Bladder / Incontinence:** [ ]
- **Criminal Record:** [ ]
- **Depression:** [ ]
- **Falls, Unsteadiness:** [ ]
- **Hearing Impairment:** [ ]
- **Infectious Disease:** [ ]
- **Lives Alone:** [ ]
- **Memory Difficulty:** [ ]
- **Neglect/Abuse/Exploitation:** [ ]
- **Support/Caregiver Not Available:** [ ]
- **Visual Impairment:** [ ]

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### Required Fields

- No fields displayed on this Page are required.

*Continued on next page*
Referral Information Secondary Navigational Tab

Required Fields  No fields displayed on this Page are required.
Financial Primary Navigation Tab

Financial Info.
Secondary Navigational Tab

No fields displayed on this Page are required.
Customer Referrals Primary Navigation Tab

Referrals
Secondary Navigational Tab

Required Fields
No fields displayed on this Page are required.
Intake Information Assistance Primary Navigation Tab

Required Fields

No fields displayed on this Page are required.

How to

Follow the steps in the below table to add Assistance information.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click on the Add Row button</td>
<td>Entry Line is displayed.</td>
</tr>
<tr>
<td>2.</td>
<td>Enter the Number of Assistance Units</td>
<td></td>
</tr>
</tbody>
</table>

Continued on next page
**Intake Information Assistance Primary Navigation Tab, Continued**

**How to** (continued)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Enter the <strong>Information Assistance Date</strong></td>
<td>For additional lines, press the Add Row button again.</td>
</tr>
</tbody>
</table>

![Standard Intake - Version 2](image)

Intake Date: 02/02/2018

No data found.

**Intake Information Assistance Entered**

<table>
<thead>
<tr>
<th>Nbr Of Units</th>
<th>Info Asst Dt</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>02/02/2018</td>
</tr>
</tbody>
</table>

 Saves Notification will be displayed.

![Intake Information Assistance Entered](image)
Print View

Form Reference
This tab will give the opportunity to print the assessment information in its entirety. The format will not be in the same arrangement as the form, but it will be divided into sections of information according to the paper form. This will open in a separate window from the assessment.

The grayed background area indicates the information is from Person Administration.

When printing the pages will separate as indicated.

Continued on next page
To Print

Follow the steps in the table below to complete the Customer Referral process.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click on the <strong>printer icon</strong> at the top right of any region.</td>
<td>Printer dialog box will display. (This may look different depending upon your printer and the options available.)</td>
</tr>
<tr>
<td>2.</td>
<td>Select the <strong>Page Range</strong></td>
<td>See table below for options.</td>
</tr>
<tr>
<td>3.</td>
<td>Click on <strong>Print</strong>.</td>
<td>Document will print.</td>
</tr>
</tbody>
</table>

To Close

The window can be closed by clicking on the **X** in the right upper corner.