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.

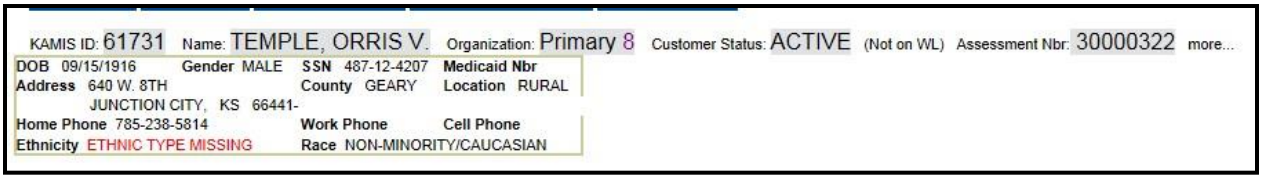
Customer Information Heading

Introduction

The customer heading displays information regarding the selected customer.

Additional Information

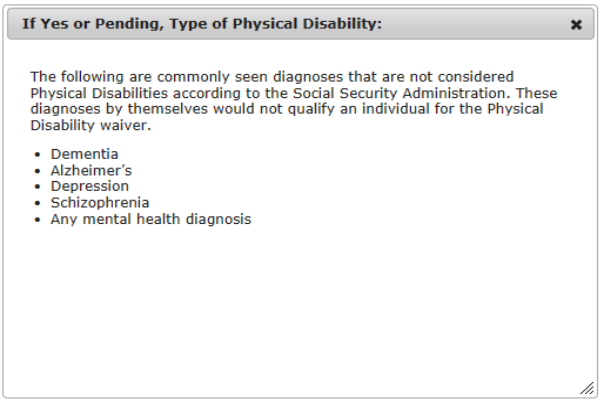
Clicking on the "more…" link will display a small snapshot of additional customer information, including the address listed in KAMIS.



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.

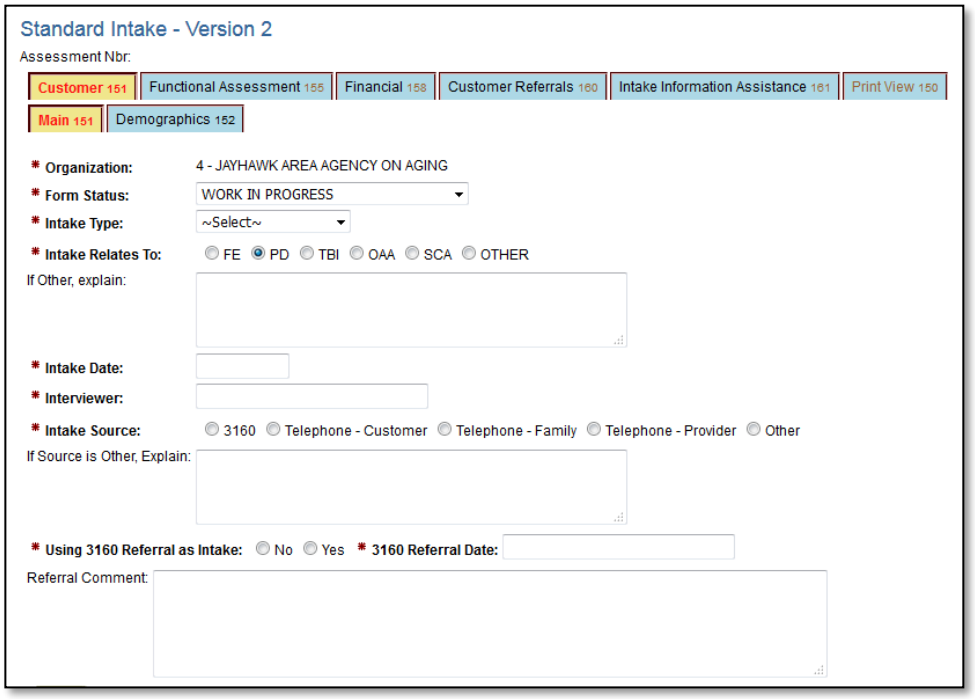


Customer Primary Navigation Tab

Requirement

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

Main Secondary Navigational Tab



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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"

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.

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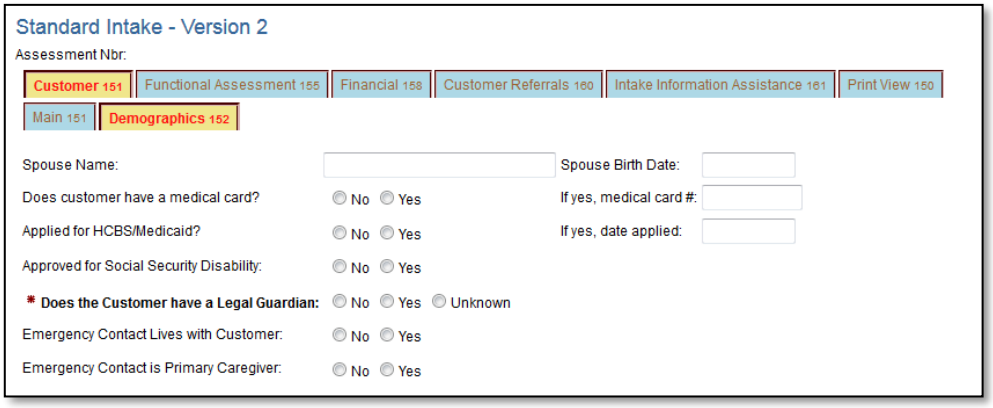
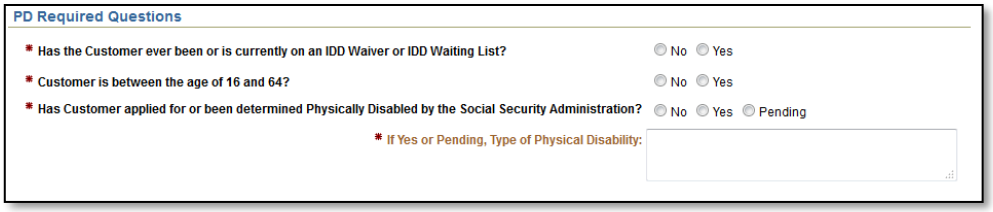
Customer Primary Navigation Tab, Continued

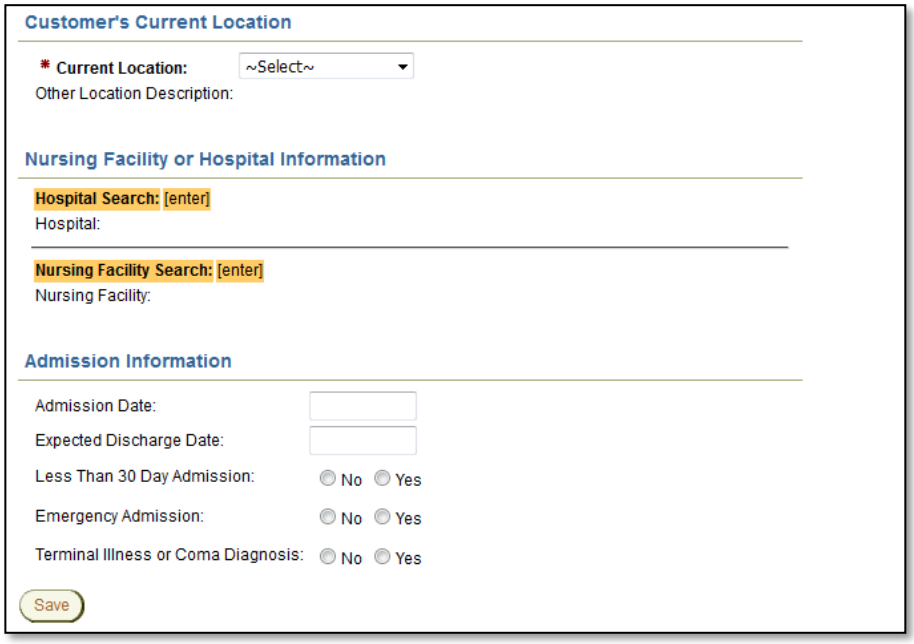
Demographic Secondary Navigational Tab



PD Required Questions Region.



** Displays only if **PD** is selected on "**Intake Relates To**" question on the Main Navigational Tab



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?***
    - ***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:

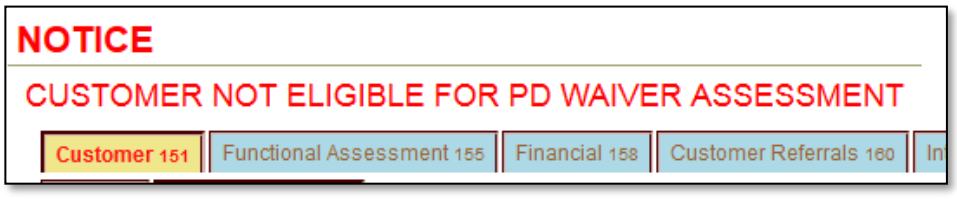
- **Yes** – Has the Customer ever been or is currently on an IDD Waiver or IDD Waiting List?

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?



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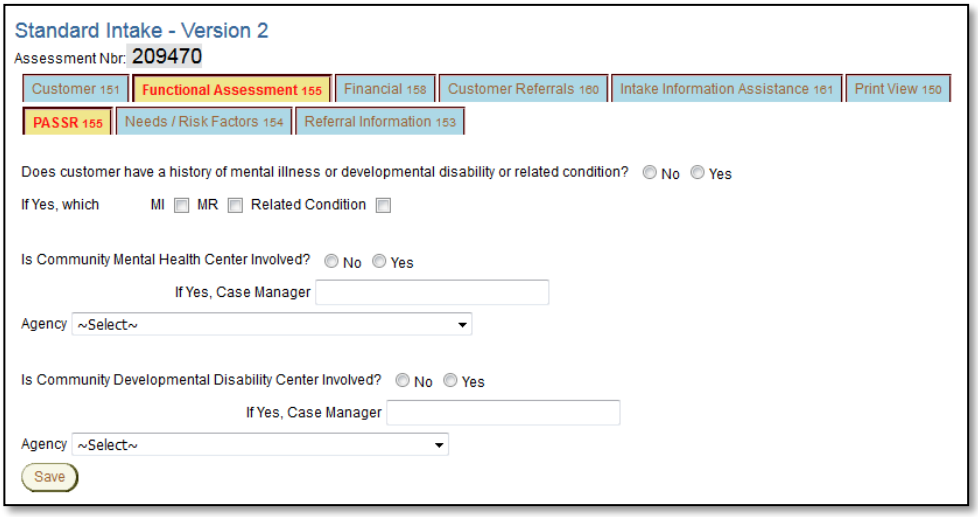
Functional Assessment Primary Navigation Tab

PASSR Secondary Navigational Tab

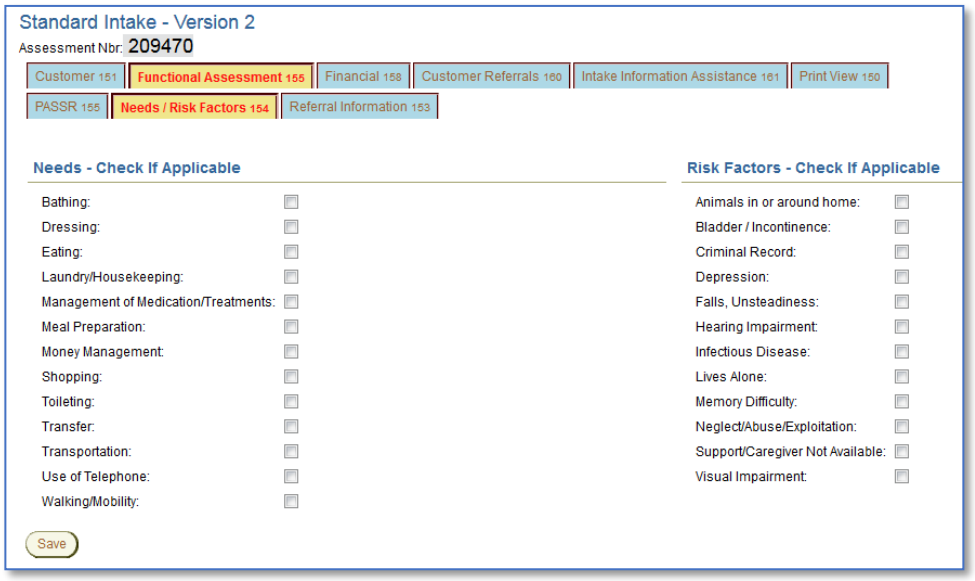


Required Fields

No fields displayed on this Page are required.

Functional Assessment Primary Navigation Tab, Continued

Needs / Risk Factors Secondary Navigational Tab



Required Fields

No fields displayed on this Page are required.

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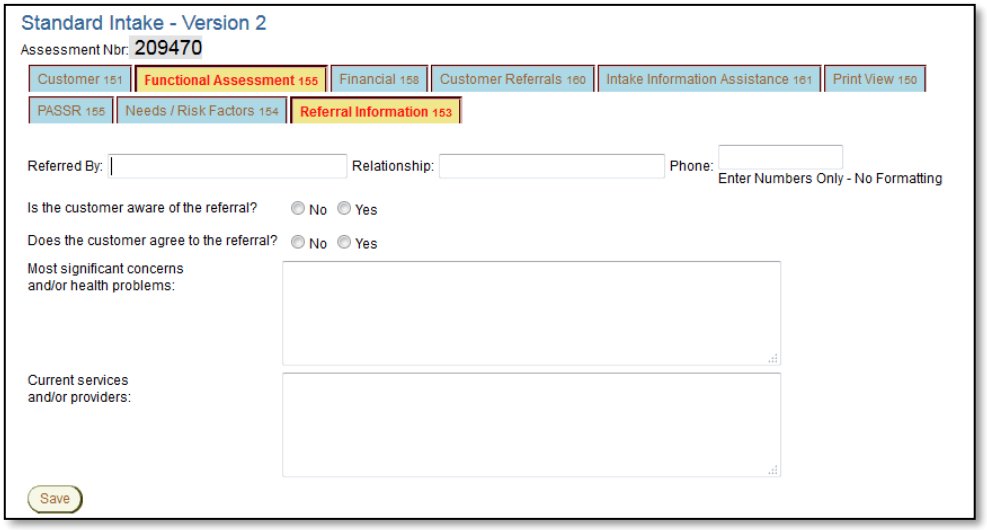
Functional Assessment Primary Navigation Tab, Continued

Referral Information Secondary Navigational Tab

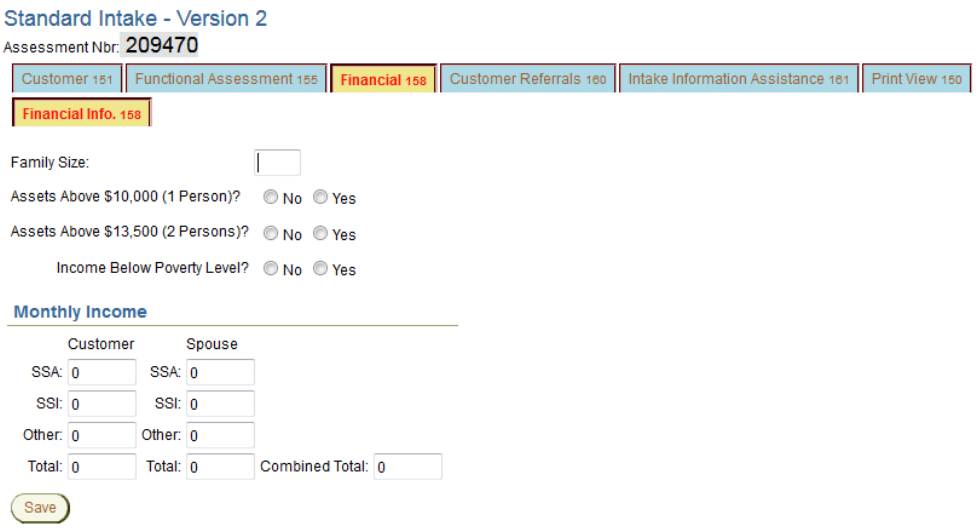


Required Fields

No fields displayed on this Page are required.

Financial Primary Navigation Tab

Financial Info. Secondary Navigational Tab

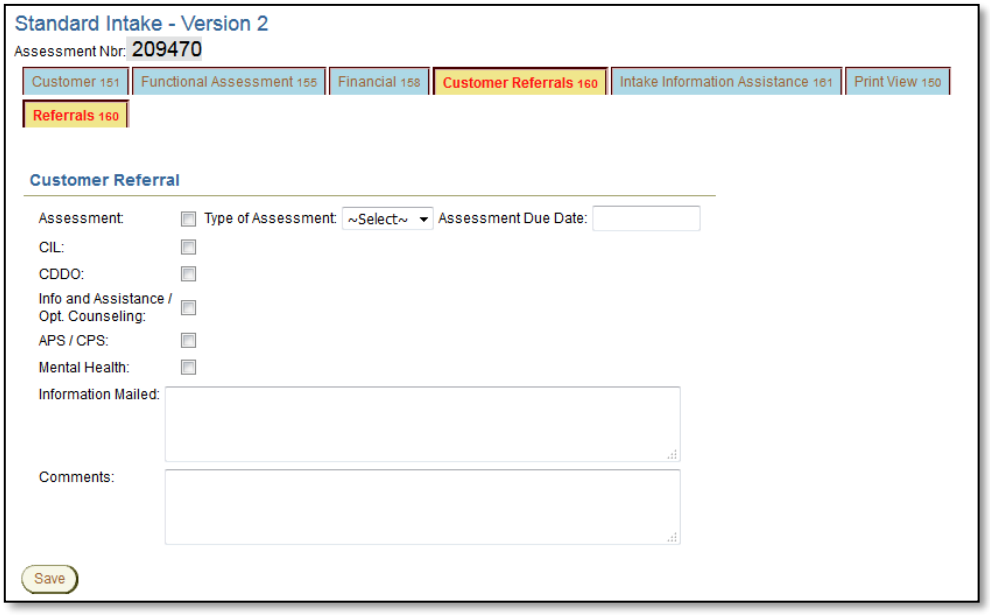


Required Fields

No fields displayed on this Page are required.

Customer Referrals Primary Navigation Tab

Referrals Secondary Navigational Tab

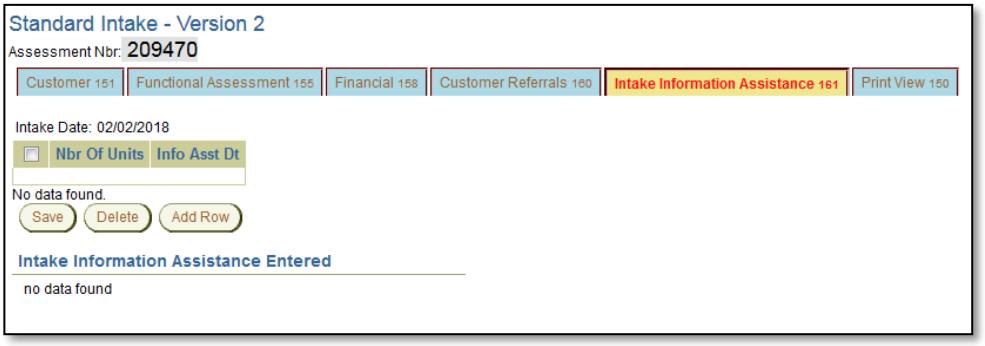


Required Fields

No fields displayed on this Page are required.

Intake Information Assistance Primary Navigation Tab

Intake Information Assistance Navigational Tab

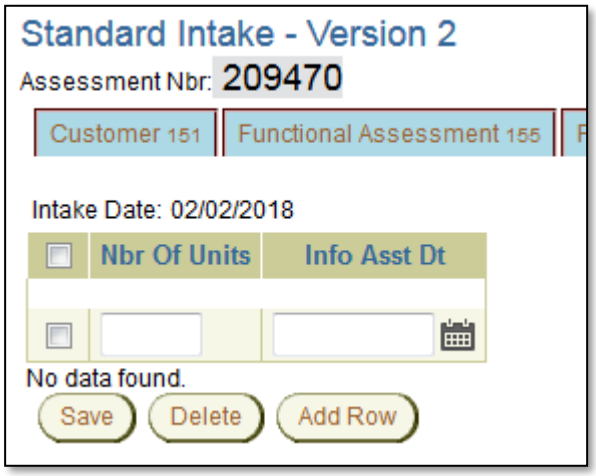


Required Fields

No fields displayed on this Page are required.

How to

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

Step	Action	Result
1.	Click on the **Add Row** button	Entry Line is displayed.
		
2.	Enter the **Number of Assistance Units**	

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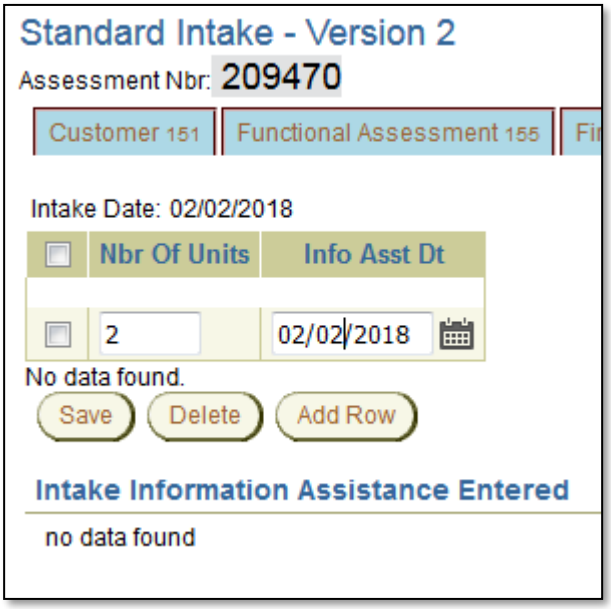
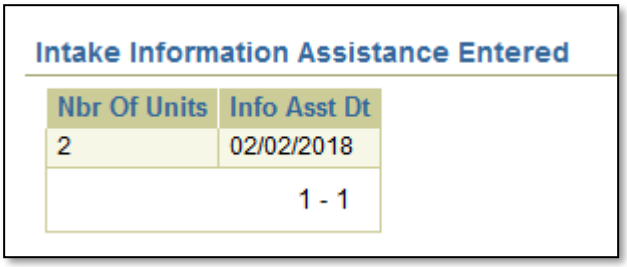
Intake Information Assistance Primary Navigation Tab, Continued

How to (continued)

Step	Action	Result
3.	Enter the **Information Assistance Date**	For additional lines, press the Add Row button again.



4.	Press the **Save** button.	Save Notification will be displayed.



Print View

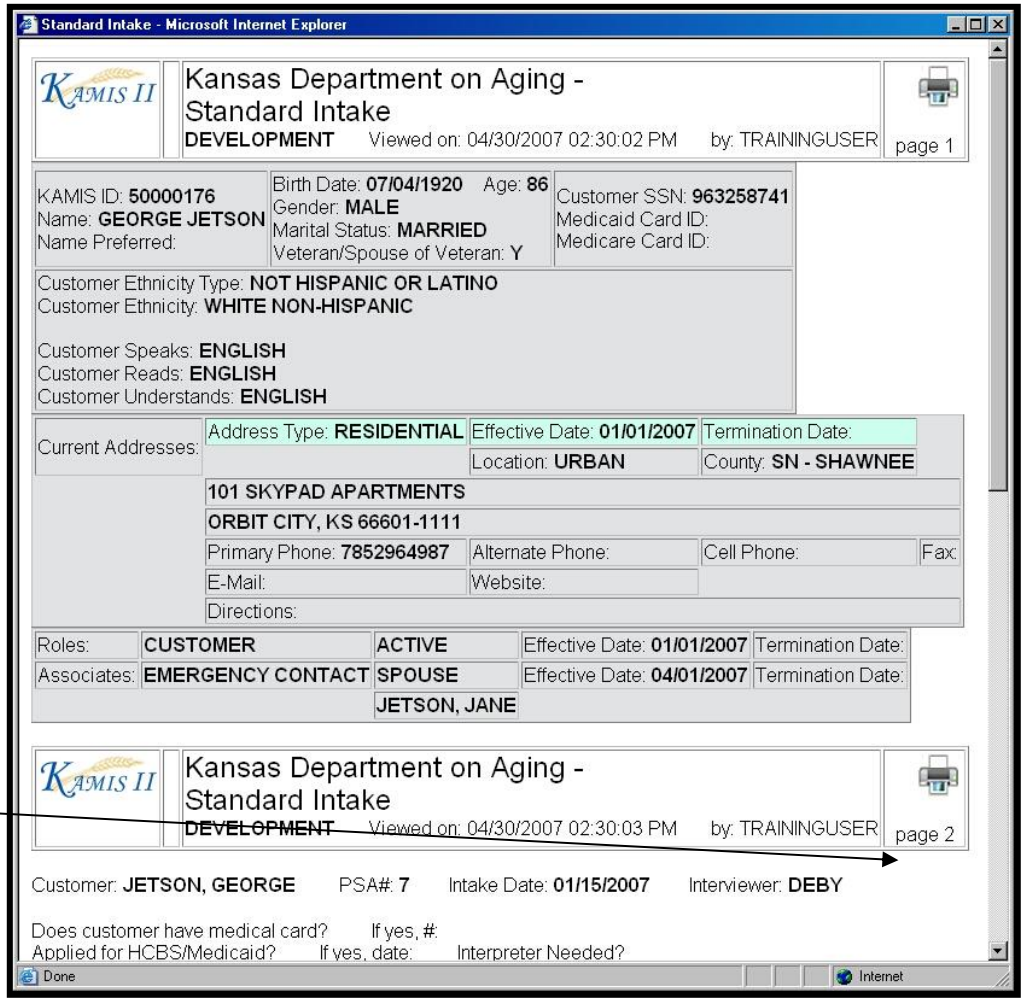
Form Reference

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.

Print View

The grayed background area indicates the information is from Person Administration

When printing the pages will separate as indicated.



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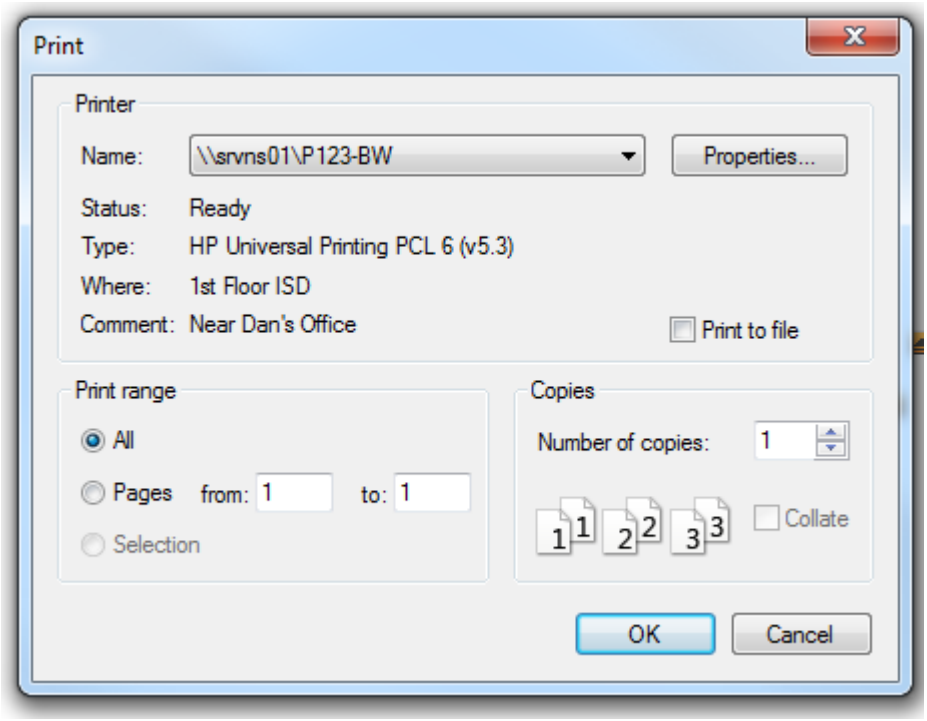
To Print

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

Step	Action	Result
1.	Click on the **printer icon** at the top right of any region.	Printer dialog box will display. (This may look different depending upon your printer and the options available.)
		
2.	Select the **Page Range**	See table below for options.
	Option / **Result** All — All pages will print Pages (enter the page number) — Only the specified page will print.	
3.	Click on **Print**.	Document will print.

To Close

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