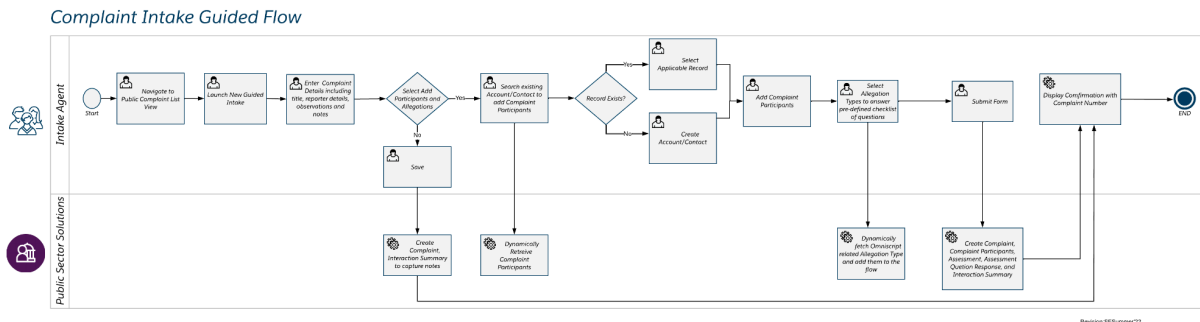


Document a Complaint using Guided Intake

In Public Sector Solutions, this process allows an intake agent to collect information about the complaint, capture details of parties involved, and record allegations using a predefined checklist of questions to determine type and severity of incident.



Overview

Intake agents record details of incident reported by mandatory reporters on child safety, health or wellbeing as complaint records. They need to record the details of the reporter, all the parties involved in the incident including the victims, perpetrators and witnesses, and the allegations made by the reporter. The participant account/contact records can be created and saved as Complaint Participants. The allegations made by the reporter can be recorded based on a pre-defined checklist of questions. The detailed allegations are recorded as Assessments, where the responses to the questions are saved as Assessment Question Responses. Depending on the responses to the questions, the type and severity of allegations are determined to initiate the next course of action. A detailed investigation may be initiated by the Intake agents in some cases to gather more details by creating an Action Plan on the Complaint record. Depending on the screening and investigation results an Intake agent may create a case and assign a Case Worker to support the constituent.

Use Case Scenario

A school teacher finds signs of injury on a child and calls the child welfare agency hotline to report potential abuse. An intake agents receives the call and uses Complaint Intake flow to record the details of the reporter, child, child's family or other parties involved in the incident, and observations made by the teacher as allegations. Intake agent also adds his comments/opinions as notes on the complaint record.

Assumptions

- The Complaint Intake OmniScript guided flow is embedded in the Public Complaint List View with a custom action button called “New Guided Intake”.
- Allegation related Omniscripts are created using discovery framework and embedded into the Complaint Intake Omniscript guided flow.
- The Add Participant OmniScript is embedded with a custom action button on Complaint Participant related list as “Add Participant”
- The Add Allegation OmniScript is embedded with a custom action button on Assessment related list as “Add Allegation”

User Story

- From the Public Complaint list view page, the intake agent launches the Complaint Intake guided flow by clicking on “New Intake”.
- The intake agent fills in the complaint details, adds complaint participants either by searching for participant records or by creating appropriate account/contact records.
- The intake agent records allegations by selecting allegation type and recording answers to predefined checklist of questions that are displayed based on allegation type.
- Once the guided flow is completed, Public Complaint, Complaint Participant, and Assessment, Interaction Summary records are created in the system.
- If the intake agent requires adding additional participants after the intake flow is completed and complaint record is created, they click on the “Add Participant” on Complaint Participant related list and add new participants or edit existing participants.
- If the intake agent requires adding additional allegations after the intake flow is completed and complaint record is created, they click on the “Add Allegation” on Assessment related list and add new allegations.

Business Objective

Provide an easy to use guided flow for the intake agents to create a complaint, to search for individuals/organizations and to add them as complaint participants, and to record allegations using a pre-defined checklist of questions and save them as assessments.

Business Value and Benefits

- Intuitive UI
- Integrate with other business processes
- Mobile and iPad ready

Process Package Includes

OmniScript (3)

- ComplaintIntake
- AddComplaintParticipants
- AddAllegation

DataRaptor (5)

- CreatePublicComplaint
- CreateComplaintParticipants
- CreateInteractionSummary
- GetPublicComplaintId
- AddComplaintParticipants

Flexcards (8)

- SelectAndBuildComplaintParticipants
- CreateAccountFlyoutLongIntake
- CreateContactFlyoutLongIntake
- CreateContactAndAccountLongIntake
- SelectAndBuildComplaintParticipantsLongIntake
- CreateAccountFlyoutShortIntake
- CreateContactFlyoutShortIntake
- CreateContactAndAccountShortIntake

Custom LWC's (10)

- createAccountLongIntake
- createContactLongIntake
- selectAndBuildComplaintParticipantsLongIntake
- selectedComplaintParticipantsLongIntake
- selectedComplaintParticipantRecordLongIntake
- createAccountShortIntake
- createContactShortIntake
- selectedComplaintParticipants
- selectAndBuildComplaintParticipants
- selectedComplaintParticipantRecord

Apex class (1)

- GetAccountsAndContacts.apxc

Configuration Requirements

1. There are three separate flows to be configured for the full functionality to be enabled:
 - a. Complaint Intake Flow
 - b. Add Participants from Complaint Participant related list
 - c. Add Allegations from Assessments related list
2. Detailed instructions to configure the complaint intake process are provided in the salesforce help, link here.
https://help.salesforce.com/s/articleView?id=sf.psc_setup_intake_guided_flow.htm&type=5
3. This Omniscript must be part of Public Complaint object list view
4. Flexcards must be deployed and activated before the Omniscript in the correct order as mentioned in the Process Package section in this document.