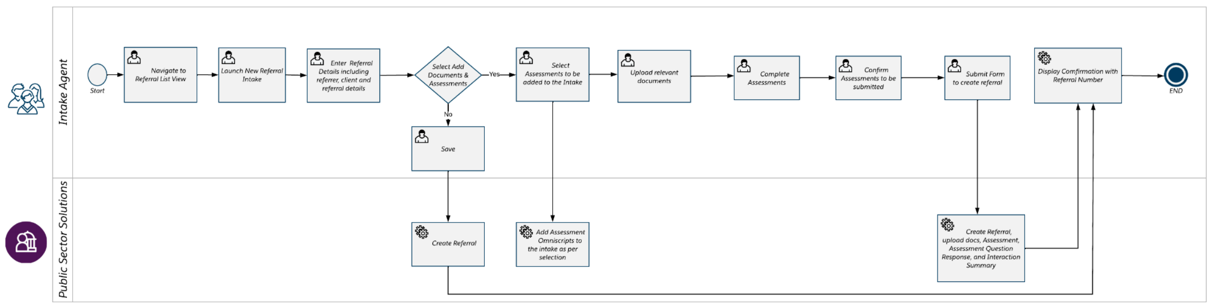
Capture Details of a Referral using Guided Intake

In Public Sector Solutions, this process allows an intake agent to collect information about a referral, capture details of the referrer and client, and run preliminary assessments using a predefined checklist of questions.

Referral Intake Guided Flow



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Overview

Intake agents receive referrals from multiple sources and they need to record the details of the referrer, the client, the reason for referral and run preliminary assessments depending on the type of referral. The assessments captured on the referral 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 nature of the referral is 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 referral record.

The referral intake may require multiple interactions to collect relevant information. 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

To help an unemployed constituent (client) find a job, a government agency that provides job assistance (referrer) interviews the constituent and recommends a training program to the client. The agency then refers the client to a skills development program offered by a social welfare agency or an external training and placement organization (provider) to help the constituent find employment.

An intake agent receives the referral and uses Referral Intake flow to record the details of the referrer, the client, the details of the referral, and observations made from pre-defined assessments. Intake agent also adds his comments/opinions as notes on the referral record.

Assumptions

- The Referral Intake OmniScript guided flow is embedded in the Referral List View with a custom action button called "New Referral Intake".
- Allegation related OmniScripts are created using discovery framework and embedded into the Referral Intake OmniScript guided flow.
- The Edit Referral OmniScript is embedded with a custom action button on the Referral record page layout "Edit Referral".
- The Create Case from Referral OmniScript is embedded with a custom action button on the Referral record page layout "Create Referral Case".

User Story

- From the Referral list view page, the intake agent launches the Referral Intake guided flow by clicking on "New Referral Intake".
- The intake agent fills in the referral details, adds referrer and client details either by searching for existing records or by adding the details manually.
- The intake agent uploads documents submitted by the referrer.
- The intake agent records assessments by selecting assessment type and recording answers to a predefined checklist of questions that are displayed based on assessment type.
- Intake agent needs to review and confirm which assessments are completed and are ready for submission.
- Once the guided flow is completed, Referral, Assessment, and Interaction Summary records are created in the system.
- The intake agent can add further details to the referral using the Edit Referral guided flow which looks similar to the New Referral intake. Any assessments that are submitted already cannot be edited.
- Once the Referral is screened in, intake agent can create a case from the referral using the Create Referral Case OmniScript.

Business Objective

Provide an easy to use guided flow for the intake agents to create a referral, to search for individuals/organizations and to add them as referrer and client and to record assessments 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)

- SubmitReferral
- EditReferral
- CreateReferralCase

DataRaptor (17)

- PSSDRSaveOrUpdateReferral
- PSSDRFetchReferralValues
- PSSDRFetchInteractionSummaryRecord
- PSSDRFetchAssessment
- PSSDRUpdateAndInsertInteractionSummary
- PSSDRSearchAccountByName
- PSSDRTransformReferrerRecord
- PSSDRSearchContactByName
- PSSDRTransformClientRecord
- PSSDRAttachFile
- PSSDRExtractSavedApplicationURL
- PSSDRGetAccountRecordsForTypeAhead
- PSSDRGetReferralDetails
- PSSDRSaveReferralCase
- PSSDRAssociateCaseWithReferral
- PSSDRGetCaseId
- PSSDRCreateCaseParticipantsForReferral

Integration Procedures (3)

- SearchReferrerByName
- SearchClientByName
- AttachFilesToReferral

Flexcards (1)

- CreateAccountAndContact

Custom LWC's (3)

- SelectRecordFull
- defaultReferralParticipants
- SelectParticipants

Apex class (1)

- GetAccountsAndContacts.apxc

Configuration Requirements

1. There are three separate flows to be configured for the full functionality to be enabled:
    a. Referral Intake Flow - Submit Referral OmniScript
    b. Edit Referral Flow - Edit Referral OmniScript
    c. Create Case from Referral - Create a Referral Case OmniScript
2. Detailed instructions to configure the referral intake process are provided in the salesforce help, link here. https://help.salesforce.com/s/articleView?id=sf.psc_setup_referral_intake_guided_flow.htm&type=5
3. This OmniScript must be part of Referral 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.