



Central Intake Management Application Installation Instructions

Register for a FREE Salesforce Developer Edition Environment

1. Navigate to <https://developer.salesforce.com/signup>
2. Complete the registration page for a new Salesforce developer edition environment
3. Navigate to <http://login.salesforce.com> and login with your user name and password

Install the Central Intake Application Package

4. Once logged in, copy/paste the Central Intake Application “package” URL into your browser URL:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t15000000Awwc>

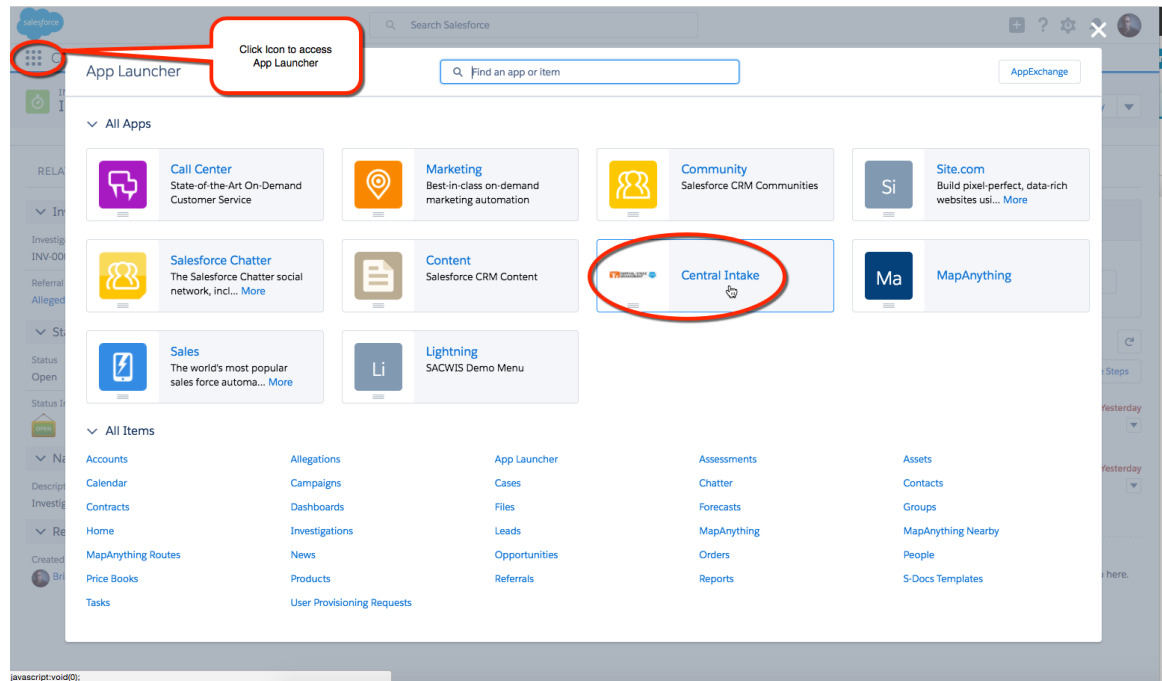
5. In the install wizard, select “Install for All Users” and click Install

The screenshot shows the Salesforce package installation wizard for the 'Install Salesforce Child Welfare Intake Management Application (Full)' by Salesforce. The wizard is titled 'What if existing component names conflict with ones in this package?' and has two radio button options: 'Do not install.' (selected) and 'Rename conflicting components in package.' Below this, there are three radio button options for installation scope: 'Install for Admins Only', 'Install for All Users' (selected), and 'Install for Specific Profiles...'. At the bottom right, there are 'Install' and 'Cancel' buttons. Below the wizard, there is a table with the following information:

App Name	Publisher	Version Name	Version Number
Salesforce Child Welfare Intake Management Application (Full)	Salesforce	Winter '17	2.0

At the bottom left, there are links for 'Additional Details' and 'View Components'.

6. Once the installation is complete, your Central Intake application is accessible in the Salesforce “App Launcher”.





Central Intake on Salesforce

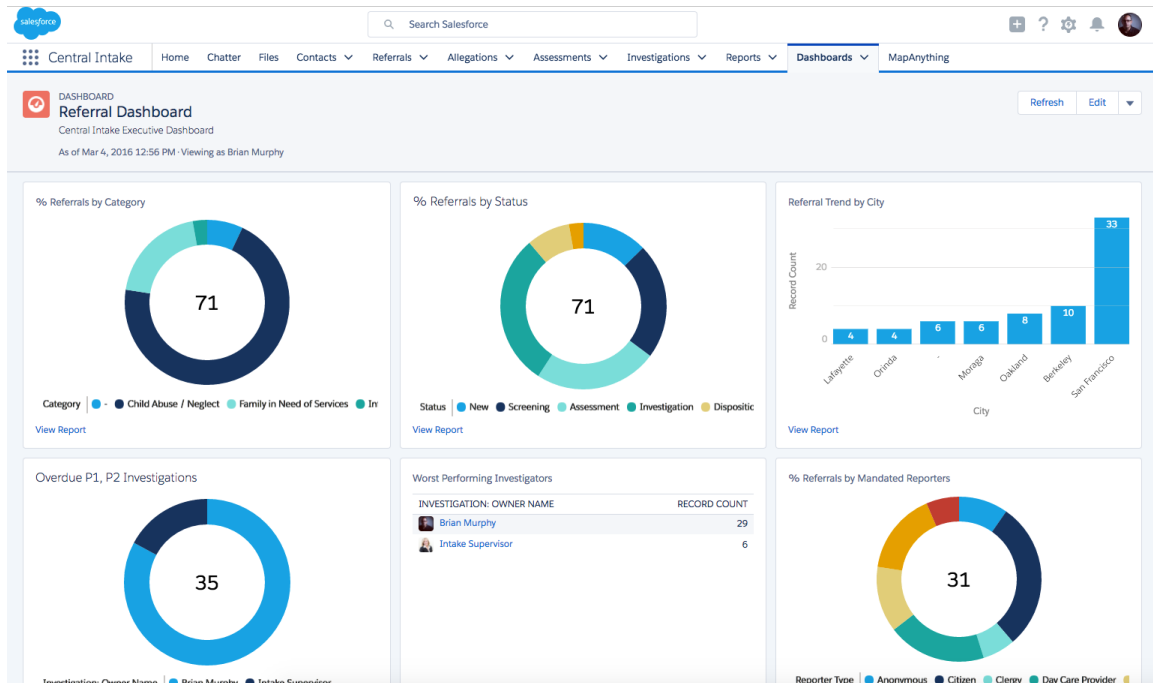
You now have access to the complete power of the Salesforce App Cloud (Force.com) platform and can use its application services to further enhance the Central Intake Management module through declarative configuration (“clicks, not code”) for your specific business process.

For more information on this application, please see the Salesforce Central Intake Management Developer’s Workshop Guide at: <https://sfdc.co/bWQEuU>



Sample Central Intake Screens

Referral Dashboard



Intake (Referrals)

The Intake (Referrals) screen displays a list of referrals. A dropdown menu is open, showing options for New Referral, Recent Records, Recent Lists, and Referrals from Mandated Reporters. The table below shows the details of the referrals.

REFERRAL NAME	DATE OCCURED	CATEGO	STATUS	STATUS INDICAT...	RESPONSE PRIO...	PRIORITY INDIC...	OWNER ALIAS
1 Shaken Baby - Vic...	7/4/2014	Child Ab	Disposition	🟢	P1	🔴	BMurp
2 Alleged Neglect - ...	12/3/2016	Child Ab	Investigation	🟡	P1	🔴	
3 Alleged Abuse - B...	11/8/2016	Child Ab	New	🟡			
4 Alleged Abuse - J...	11/1/2016	Child Ab	Screening	🟡			
5 Alleged Abuse - A...	10/3/2016	Child Abuse / Ne...	Investigation	🟡	P1	🔴	
6 TEST MODULE 5	3/8/2016	Child Abuse / Ne...	Investigation	🟡	P1	🔴	
7 Alleged Medical ...	5/1/2014	Child Abuse / Ne...	Investigation	🟡	P1	🔴	BMurp
8 Alleged Abuse - J...	8/7/2016	Child Abuse / Ne...	Investigation	🟡	P1	🔴	
9 Child in Danger - ...	8/14/2014	Family in Need of...	Assessment	🟡	P3		BMurp
10 Alleged Medical ...	2/4/2015	Child Abuse / Ne...	New	🟡	P1	🔴	BMurp
11 Alleged Maltreat...	5/1/2014	Child Abuse / Ne...	Screening	🟡	P2	🟡	BMurp
12 TEST WORKFLO...	3/8/2016	Child Abuse / Ne...	New	🟡			
13 Alleged Physical ...	3/1/2012	Child Abuse / Ne...	Assessment	🟡	P1	🔴	BMurp
14 Alleged Abuse - S...			New	🟡			BMurp

Referral Details

Central Intake

Home

Chatter

Files

Contacts

Referrals

Allegations

Assessments

Investigations

Reports

Dashboards

MapAnything

REFERRAL

Alleged Neglect - Alec Wintering

Following

Edit

New Allegation

New Note

DETAILS

RELATED

Referral Id

REF-000092

Referral Name

Alleged Neglect - Alec Wintering

Summary

Alleged neglect of a minor child. Child was left alone for 2 days reported by a neighbor

Category

Child Abuse / Neglect

Status

Investigation

Status Indicator

Reporting Party Information

Reporting Party

Jamie Francis

Reporter Type

Legal Personnel

Screening Decision

Owner

New Referral Queue

Date Reported

12/6/2016

Date Occured

12/3/2016

Sub-category

Neglect

Response Priority

P1

Priority Indicator

Mandated Reporter

☒

Screening Decision Comments

ACTIVITY

CHATTER

New Event

New Task

Log a Call

Subject

Filter Timeline

Next Steps

More Steps

Document Allegations

Add allegations, alleged victims and alleged offenders

Dec 6

Document & Complete Referral Record Data

Please document all Referral Data including reporting party, c...

Dec 6

Past Activity

No past activity. Past meetings and tasks marked as done show up here.

Referral Related Lists

Central Intake

Home

Chatter

Files

Contacts

Referrals

Allegations

Assessments

Investigations

Reports

Dashboards

MapAnything

REFERRAL

Alleged Neglect - Alec Wintering

Following

Edit

New Allegation

New Note

DETAILS

RELATED

Allegations (1)

New

ALLEGATION ID	CREATED DATE	TYPE	SUB-TYPE
ALLEG-000023	12/6/2016 8:31 AM	Neglect	Physical Neglect

View All

Assessments (1)

New

ASSESSMENT ID	ASSESSMENT DATE	RECORD TYPE	RISK ASSESSMENT SCORE
ASSESS-000021	12/6/2016	Safety Assessment	0

View All

Investigations (2)

New

INVESTIGATION ID	DESCRIPTION	DUE DATE	STATUS
INV-00083	Investigation created for associated Referral by Lightnin...	12/7/2016	Open
INV-00084	Investigation created for associated Referral by Lightnin...	12/7/2016	Open

View All

Notes & Attachments (0)

Upload File

ACTIVITY

CHATTER

New Event

New Task

Log a Call

Subject

Filter Timeline

Next Steps

More Steps

Document Allegations

Add allegations, alleged victims and alleged offenders

Dec 6

Document & Complete Referral Record Data

Please document all Referral Data including reporting party, c...

Dec 6

Past Activity

No past activity. Past meetings and tasks marked as done show up here.

Allegation

Central Intake

HomeChatterFilesContactsReferralsAllegationsAssessmentsInvestigationsReportsDashboardsMapAnything

ALLEGATION

ALLEG-000023

+ FollowEditNew ContactNew Opportunity

RELATEDDETAILS

Allegation Info

Referral

Alleged Neglect - Alec Wintering

Allegation Id

ALLEG-000023

Summary

Alleged physical neglect

Status

Type

Neglect

Disposition

Sub-Type

Physical Neglect

Disposition Indicator

Parties

Victim

Alec Wintering

Offender

James Davisson

Record Info

Created By

Brian Murphy, 12/6/2016 8:31 AM

Last Modified By

Brian Murphy, 12/6/2016 8:31 AM

ACTIVITYCHATTER

PostPollQuestion

Share an update...

Latest Posts

ALLEG-000023 - Brian Murphy

Just Now

@Intake Supervisor can you please review the investigation decision?

LikeComment

Write a comment...

Brian Murphy created this allegation.

December 6, 2016 at 8:31 AM

ALLEG-000023

View more details

Investigation

Central Intake

HomeChatterFilesContactsReferralsAllegationsAssessmentsInvestigationsReportsDashboardsMapAnything

INVESTIGATION

INV-00083

+ FollowEditNew ContactNew Opportunity

RELATEDDETAILS

Investigation Info

Investigation Id

INV-00083

Due Date

12/7/2016

Referral

Alleged Neglect - Alec Wintering

Owner

Brian Murphy

Status & Disposition

Status

Open

Disposition

Status Indicator

Disposition Indicator

Narrative

Description

Investigation created for associated Referral by Lightning Process Builder

Record Info

Created By

Brian Murphy, 12/6/2016 8:31 AM

Last Modified By

Brian Murphy, 12/6/2016 8:31 AM

ACTIVITYCHATTER

New EventNew TaskLog a Call

Subject

Filter Timeline

Next Steps

Document all Evidence

Document all evidence such as notes, activities taken, att...

Yesterday

Interview all Parties

Interview all parties involved in the allegations

Yesterday

Past Activity

No past activity. Past meetings and tasks marked as done show up here.

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