

Intake Form

Transcript

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This video provides an overview of how to navigate the intake process in GPMS to create new cases.

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To begin, open the Cases tab within GPMS and click the Add Applicant button.

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This will take you to the intake form that GPMS uses to create a new case.

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The intake process has five pages, represented by these tabs here.

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I will demonstrate how to create a new case,

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going through each of the five pages as I do.

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Looking at the first question, notice that there is this 941 number that precedes the text.

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This number indicates the PIRL data element that the question corresponds to.

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Throughout the intake, questions that are directly tethered to PIRL data elements have the corresponding element number at the front of the field label, just as it is here.

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Other intake form features to note are that asterisks indicate required fields, and these question marks provide more information that you can hover your cursor over to access.

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Returning to the first question, we have to indicate whether this person is a reportable individual.

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A reportable individual is someone who receives self-service or information-only services, as opposed to someone who enrolls in and receives program services.

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For the purposes of this demonstration, I will select No.

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But if I were to select Yes, this person is a reportable individual, notice that the fourth page of the intake form on WIOA and other programs disappears, as it does not apply to reportable individuals.

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The next required field asks for an observation number.

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As the additional information says, an observation number is a unique identifier that's assigned to each case.

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GPMS automatically generates an observation number when you create a new case, but you can edit it as well.

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For example, you may want to use a system that assigns meaning to the observation number, with digits corresponding to sites, or case managers, or something else that suits your needs.

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The next field allows you to assign the case to an office and a case manager.

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In the Applicant Identification section, you'll enter a name, social security number, and unique individual identifier.

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Grantees should attempt to collect Social Security numbers, though should not turn participants away for not providing this information.

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If the participant declines, enter nine nines in the field, as explained in the pop-up.

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Note that GPMS automatically generates a unique individual identifier using the last four digits of the social security number and the individual's last name.

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This unique identifier is different from the observation number in that it follows a person across records, unlike the observation number.

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So if you create a new record for a person who received services and exited the program, but then re-entered at a later date,

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That person will have the same unique identifier, but a new observation number.

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There's also room to enter contact information here, with fields for phone numbers, e-mail, and addresses.

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The zip code is required, as is the state.

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These fields refer to the participant's current place of residence.

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The county code automatically populates based on the ZIP and state.

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The next field asks for a labor market area and physical location code.

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This is different from the previous fields in that it pertains to the location of services, not the place of residence.

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Opening up the informational text, we see that the field takes up to nine digits.

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The first two are the state FIPS code, the next three are the county FIPS code, and the last four digits specify a physical location.

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To get the state and county FIPS codes, which make up the first five digits, follow the instructions in the text box for Field 102.

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This pop-up provides the URL for a website with a complete list of FIPS codes.

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It also reiterates that within a five-digit FIPS code, the first two digits refer to the state, and the last three digits refer to the county.

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This is the web page specified in the text box.

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To retrieve the state and county codes, select the relevant state map from the list.

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I entered a zip code in Alameda County, California, so I will select the California map.

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As you can see, the map shows all of the counties in the state, with a five-digit code assigned to each.

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Notice that the first two digits in each code are 06.

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That's because 06 is the FIPS code for California.

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The next three digits are the county FIPS code, and they are unique to each county.

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Of course, this format holds across states: the first two digits refer to the state, and the next three refer to the county.

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Locating Alameda County, these will be the first five digits that I enter into the Labor Market Area field in GPMS.

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Re-examining the pop-up, it says that the last four digits refer to a physical location.

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Typically, this is a one-stop career center or affiliated partner site.

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These locations do not have federally standardized codes, though some agencies assign their own identifiers to the sites.

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If your organization does have such a code, this field provides an opportunity to record it.

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Otherwise, record just the state and county FIPS codes, which amount to five digits, as I have done here.

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There is also room on this page to enter additional contact information, including social media accounts.

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The next page of the intake form is Program Eligibility.

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Making a farmworker status selection will bring up the Low Income field.

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For this demonstration, I'll select Seasonal Farmworker Adult.

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Here you can see the Low Income field has appeared.

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If you select No, alternative eligibility options will appear.

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For the purposes of this demonstration, I'll select Yes.

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This question asks about which low-income criteria the applicant meets.

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For more information about these criteria, see TEGL 1418.

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Having indicated low-income status, you will then put in a date of eligibility.

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This date is important because it opens a 90-day window in which the remaining intake steps must be completed.

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Both a career assessment and a first service, such as a P service, housing, or related assistance service, must be recorded within the 90-day window.

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Once they are, the case status will become active.

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Note that the date of program entry is generated based on the start date of the activating service.

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Once you click this Save and Continue button, you will not be able to go back and make changes to this part of the intake form.

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The other pages of the intake process will remain editable, but this Program Eligibility tab will lock.

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This is also a good moment to show that at this point, having partially completed the intake, GPMS has created a record for this individual.

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You can click out of the intake form into the summary,

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and see that the information you've entered is being saved to the record.

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You can even click all the way back out to Cases to find the case within the master list.

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So it's certainly possible to complete part of an intake, save, and come back to it later.

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Returning to the in-progress intake, we'll move on to the demographic page of the form.

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This section contains a number of fields about the applicant's characteristics and background.

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I've gone ahead and filled in responses for this section, but wanted to note a few things.

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For element 400, Employment Status at Program Entry,

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The difference between not in labor force and unemployed is intent.

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People who are unemployed presently intend to gain employment.

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People who are not in the labor force do not.

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The occupational code is not a required element, but as with all non-required questions, we encourage you to add information if it's available.

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The form provides this Find Occupational Code link.

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This takes you to O*NET, where you can enter a profession to locate the code.

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The code is displayed here, at the top of the page.

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Moving on to the next page, the form contains a series of questions about the applicant's participation in WIOA and other programs.

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The first question is not required, but provides the opportunity to indicate that the applicant did not co-enroll in any other program, or that this information is unknown.

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Selecting either option will automatically select No or Unknown for all the questions on this page.

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That brings us to the final page of the intake form.

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Indicate whether an initial assessment has been completed here.

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As noted, the individual will only move from applicant status to active participant status once an initial assessment has been completed.

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Then there are signature options that you can toggle based on your organization's policies.

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These become clickable once you have attested to the veracity of the information you've entered.

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Note that the Complete Intake option is not available because I've indicated that the initial assessment has not been completed.

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If I change this field to Yes, the Complete Assessment and Send for Approval buttons become available.

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Clicking Complete Approval

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will require you to enter a P service, officially moving the individual from the Applicant stage to the Active Participant stage.

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Clicking Send for Approval does not require you to enter a P service at that exact moment.

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That concludes the overview of the intake process.

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As always, please e-mail the NFJP inbox if you have additional questions.