



Intake Screen Role Play Activity

This role play activity is designed to collect feedback about the flow and content of the draft Intake Screen. During this activity you will work with a partner to walk through each section of the Screen and discuss any potential changes that should be made to improve the tool. Your feedback is very important, and will lead us to a tool that is most applicable for intake staff to use on a daily basis throughout the state. Below we have outlined the steps that should be taken to complete this activity.

Preparation for the Role Play

1. Ensure that you have the following forms:
 - ***Draft Intake Screen Tool***
 - ***Additional Feedback Sheet***
 - ***Intake Screen Role Play Activity Time Table***
2. Select an individual sitting near you to be your partner as you walk through the Screen. If you are calling in, you will be able to walk through the Screen on your own.
3. Decide which partner will be the 1) **Intake Staff** and 2) **Participant**.
4. **Individuals acting as Intake Staff-** The partner acting as the intake staff should review the directions at the top of the document and familiarize him/herself with the questions being asked throughout the tool. **Note:** Upon implementation, the Screen will typically be completed over the phone.
5. **Individuals acting as the Participant/Individuals on the phone-** If the individual acting as the participant does not have an LTSS need, he/she should develop a scenario of an individual with an LTSS need. This should be a common scenario that occurs in his/her work with the SEP/CCB/other entity. If the participant is an individual with an LTSS need, he/she should complete the Screen based upon the most appropriate need.

Working through the Module

6. The intake staff should begin with the first section, *I. Reason for Contact*, in the ***Draft Intake Screen Tool***. You may write in the information, mark up the form, or just talk through the section.
7. When you have completed the *Reason for Contact* section, both partners should utilize the corresponding section in the ***Additional Feedback Sheet*** to provide feedback on items and/or directions that should be updated, added, or removed. If the feedback is in reference to a particular question, be sure to identify the question number in the ***Sheet***.
 - For each section, make sure to document the time it took to complete in the ***Additional Feedback Sheet***.
 - **Note:** During today's activity we will be walking through the paper tool, however, this form will be automated during implementation. As a result, spaces in the paper tool may not look large enough, but will be expandable in the automated tool.
8. Continue through the remainder of the Intake Screen in a similar fashion, taking time at the end of each section to provide feedback in the corresponding section of the ***Additional Feedback Sheet***.



Intake Screen Additional Feedback Sheet

1. Reason for Contact

Time to complete section:

2. Caller/Participant Information

Time to complete section:

3. Determining if Screen is Appropriate

Time to complete section:

4. Eligibility Screen

Time to complete section:



5. Financial Information

Time to complete section:

6. Risk Trigger Screen

Time to complete section:

7. Assessment Pathway

Time to complete section:

8. Outcomes and Referrals

Time to complete section:

Total time to complete Intake Screen:

9. Other Feedback