TIG FINAL EVALUATION REPORT

Grantee name: Legal Services of Greater Miami, Inc.   TIG grant number: 14018
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I.   Project Goals and Objectives

The project goal was to improve the efficiency and effectiveness of Florida legal services programs and enhance clients' access to legal services by developing and implementing a pilot multi-lingual integrated online intake system for three Florida programs using the Legal Server case management system and online intake module. The project objectives were to:

1. Develop a three-program multi-lingual integrated online intake system which integrates the Legal Server online intake module with the Legal Server case management system to automatically transfer client data into the case management system for each partner program.
2. Increase the efficiency and effectiveness of Partner Programs and enhance access to legal services by the residents of their service areas by implementing the integrated online intake system.
3. Encourage replication and expansion of the integrated online intake system by other Florida programs through publicity, training and support.

II.   Evaluation Data and Methodologies

- Identification of online intake system components.
- Description of online intake system components, capacity, and functionality of E-transfer feature.
- Staff training data, (e.g. description of trainings, personnel trained with organizational affiliation and job category, etc.)
- Description of any significant problems identified through implementation and changes made.
- Administrative data such as:
    1. Number of people using online intake application.
    2. Applicant geographic data.
    3. Disposition of online applications.
    4. Total intakes per intake staff before and after implementation.
    5. Average time per intake before and after system implementation.
    6. Number of links to online intake applications through the Statewide Website.
- Feedback and input data such as:
    1. Applicant feedback regarding the online application.
    2. LSGMI and Partner Program recommendations for expansion and improvements.
- Training webinar feedback survey data.
- Description of trainings.

- Links to archived trainings.
- List and links to guidance materials.
- Web analytics concerning usage of training
- Description of other support provided to Florida programs and publicity.

III.   Summary of Major Accomplishments, Recommendations and Future Steps

 LSGMI created an online application in English, Spanish and Creole using the Legal Server online intake module based upon the specification and requirements outlined by our partner programs, Bay Area Legal Services (BALS) and Three Rivers Legal Services (TRLS). The application can be easily accessed through the website for each of the partner programs and the statewide website (floridalawhelp.org). The application quickly determines in which county the user is residing and refers them to the appropriate landing page for the program in their service area. Applicants who do not live in the service area for BALS, LSGMI, or TRLS are provided with a link to LSC.gov to find a provider in their area.

Expanding the online application to include two partner programs was a significant step toward a statewide online intake application. As a result of this expansion the online application is now available to residents in 24 Florida counties, which represents more than a third of the counties in the state. Three of the top 5 most populous counties in Florida are now eligible to apply for services online. Additionally, other programs in Florida have contacted Ilenia Sanchez-Bryson, the Project Director, to discuss how they can add their program to the online intake application.

IV.   In-Depth Analysis of Accomplishments

Online Application Design

To create the online application we used the Legal Server online intake module. The module resides on a separate instance of Legal Server at https://floi.legalserver.org/. The online application is designed to be responsive for use on cell phones and tablets. Additionally, it is available in English, Spanish and Creole. The application's URL (https://floi.legalserver.org/modules/matter/extern_intake.php?pid=38&h=757e8c) was added as an icon or button to each program website and the statewide website.

On the first page of the online application the user selects the language they would like to use (Creole, English, or Spanish). The next step is for the user to select their county of residence which routes them to the correct application process. Due to differences in priorities, screening questions, and referral resources we determined that the application must branch out differently for each program very early in the application process. Attached are several screen shots of the online intake application.

Applicants who are determined to be ineligible receive a link to another provider or self-help information and are then routed to a survey regarding the online application. Applicants who are determined to be eligible are routed to a page summarizing the information they provided and are

informed that they will be contacted by the respective program within two business days. If they provided an email address they will also receive an email confirmation of their application. The applicant's eligibility is determined primarily by their location, immigration status, income, and legal problem. Although when someone contacts our offices directly we also screen for conflicts the application could not accurately make these determinations. Additionally, we did not make the opposing party field required because we determined that applicants may not always be clear on who to include. Instead, staff is trained to ask for this information when they contact the applicant.

Completed online applications are e-transferred to the designated program's instance of Legal Server and an assigned staff member receives an email that an online application has been successfully submitted. The online application remains in a holding pen until it is assigned to an intake or screening staff member who completes a conflict check. If the staff member determines a conflict exists the application is rejected and the information never enters program's instance of Legal Server. If the staff member determines that no conflict exists that they will call the applicant, release the application into their instance of Legal Server and confirm the information the applicant provided through the online intake. If all the information is correct and the applicant is eligible then the next step is a substantive interview. If, after reviewing the online application information, the staff member determines the applicant is ineligible then a referral or self-help information is provided and the application is rejected.
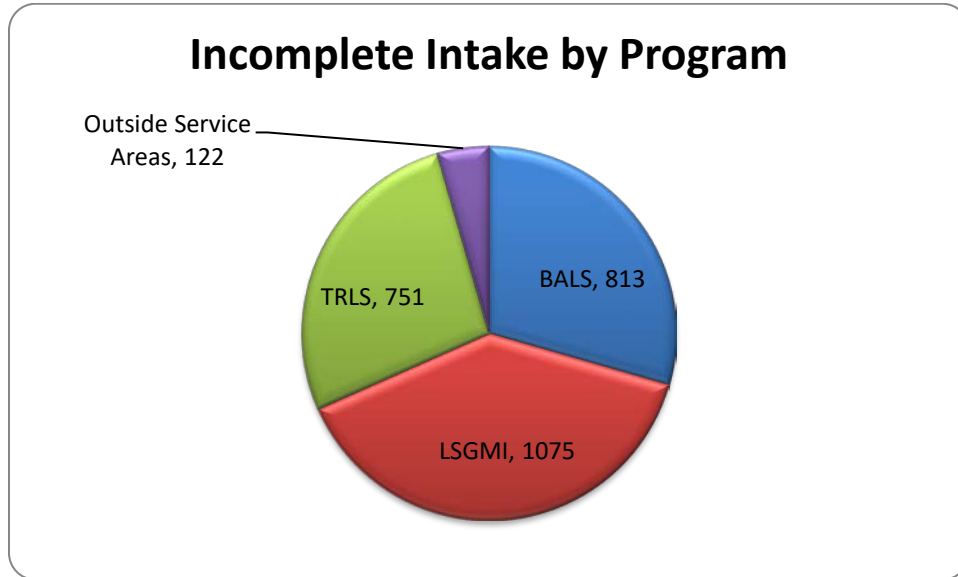
Online Application Results

The expanded online intake application went live on March 1, 2017. Between March 1, 2017 and June 30, 2017, 6,765 applicants started an online application. Of those applications 5,787 (86%) were incomplete applications. Since the second page of the online application asks the user to select their county we determined that 2,761 (48%) of the users made it that far, the other 3,023 (52%) stopped the application after the language selection and are considered to have abandoned the intake application. Of the 2,761 incomplete applications where the users had selected their county of residence, 1,560 (56%) got through adding their name to the application. At this point the user abandoned the application or was referred to another source of assistance after being determined ineligible. This means that 44% of those who used the online intake application and were not ultimately eligible for services were determined to be ineligible before we collected any identifying information simply by answering questions regarding any urgent deadlines, county of residence, legal problem category, and immigration status. Those that abandoned the application before entering their name could be due to one of several reasons:

1) They read through the landing page and the list detailing the information they will need to have available to complete the application and abandon to collect the information and return some time later.
2) They read through the landing page and determine they have one of the legal situations we advise not to use the application for such as a case scheduled for hearing within 2 weeks or a house set to be sold at auction within 15 days.
3) They entered identified an immigration status that made them ineligible.

Add any additional information available on:

- the effect on the efficiency of intake for each partner program?
- the usage of the multi-lingual intake applications?
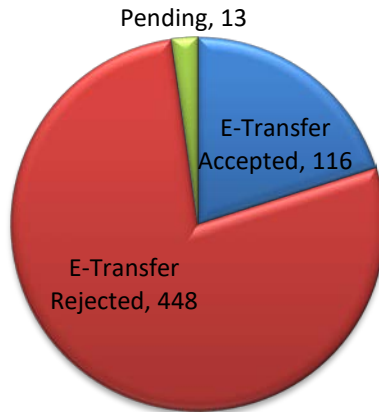- any satisfaction surveys of partner staff?

Incomplete Intake by Program

Outside Service Areas, 122

BALS, 813

TRLS, 751

LSGMI, 1075

In total 982 completed intakes were e-transferred from the online application to the partner programs, 577 to BALS, 176 to LSGMI, and 229 to TRLS.
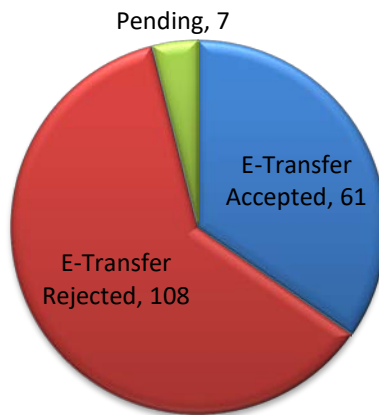
E-Transferred Applications by Program

TRLS, 229

LSGMI, 176

BALS, 577
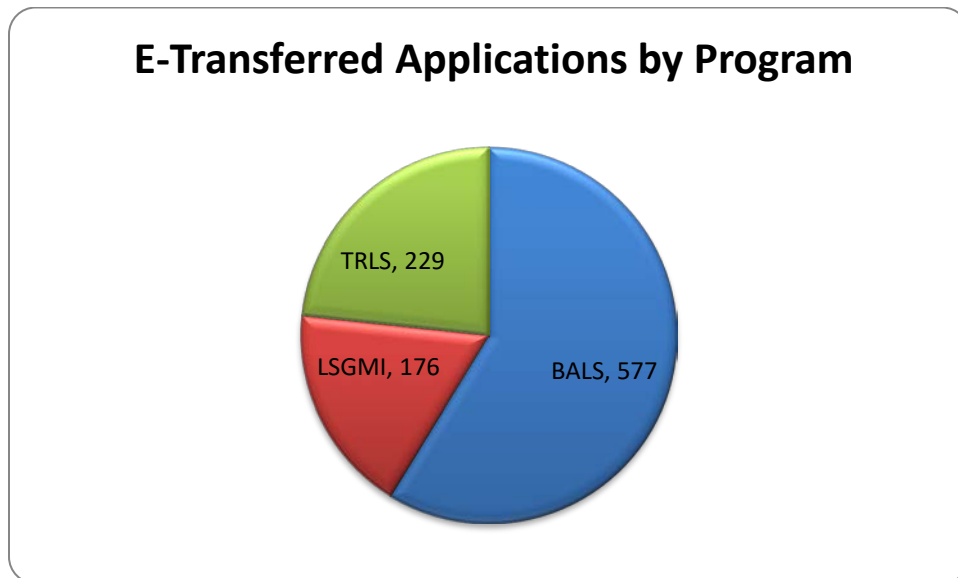
Below is a breakdown of the result of the e-transferred intake for each program.

BALS E-Transfer Results

Pending, 13

E-Transfer
Accepted, 116

E-Transfer
Rejected, 448

LSGMI E-Transfer Results

Pending, 7

E-Transfer
Accepted, 61

E-Transfer
Rejected, 108

TRLS E-Transfer Results

Pending, 3

E-Transfer Accepted, 87

E-Transfer Rejected, 139
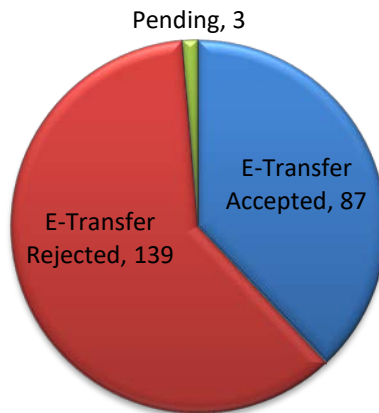
Applicant Feedback

Whenever an applicant completes the intake application, regardless of whether they are found ineligible or their application was successfully submitted, they are sent to a survey regarding the online application. We use the survey to obtain feedback regarding their experience using the application. We received 1,099 survey responses between March 1, 2017 and June 30, 2017; 503 for BALS, 358 for LSGMI, and 238 for TRLS. Of those applicants surveyed over 90% indicated that the application was easy to use.

Challenges and Changes

Although all three partners are LSC funded programs and have very similar eligibility criteria it became clear that we all handle intake in different ways. Initially, we believed the design of the application would allow us to have a single application that would e-transfer at the end for each program. However, because of the different ways each program screens, the fact that services can vary depending on county, and the different legal problems handled by each organization, it became evident that the application would need to branch off as soon as the user identified their county. This provided much more flexibility for how each program could screen and what self-help information is provided to ineligible applicants. At the same time, this made the process of creating the expanded online application more complex. Each step in the application had to be replicated for each program which took more time to create and required translation of more text than initially anticipated.

When LSGMI initially created our program-specific online intake application with the support of TIG #13001 we did so in the online intake module demo site which was then migrated to the live site by PSTI, the developer of Legal Server. When expanding online intake to the partner programs we took the

same approach. However, when we contacted PSTI to move the application to the live site we learned that having the application copied over to the live site would cause us to lose all the previous applications submitted to the LSGMI online application. To avoid this loss of data we decided to manually copy over the BALS and TRLS portions of the application. This took approximately 50 additional staff hours to accomplish. For any programs that want to add their application to the online application, they must consider the need to expend this additional time since it is not advisable to create the application directly in the live site without having the opportunity to test before launching.

Application Testing and Training

The application was tested throughout the development with input from BALS and TRLS. Additionally, during the week of February 24, 2017 the partner programs' staff tested the application and submitted recommended changes to LSGMI. The recommendations helped clarify the problem specific questions and identify issues with the eligibility questions. Additionally, the Project Director had a weekly call with the partner programs for the month after the application went live to discuss any problems with the application or the e-transfers.

The Project Director hosted a webinar for staff at BALS and TRLS on February 23, 2017 to train them on the process to accept the online intake e-transfer. Eight staff members registered of the training which can be viewed online at https://register.gotowebinar.com/register/2088820685307630849.

Additionally, on February 27, 2017 the Project Director hosted a webinar for providers across the state to share the lessons learned and discuss next steps for programs interested in joining the online intake application. The recorded webinar can be viewed online at https://register.gotowebinar.com/register/1396799062061093633. The recording and an Online Intake Implementation Manual have also been posted on the Florida Law Advocate website on the training page. The Online Intake Implementation Manual is also attached.

V.   Factors affecting project accomplishments

The most significant factor affecting the completion of the project was copying the BALS and TRLS applications manually to the live online intake module. Manually copying the application resulted in an additional 50 hours of unanticipated work. Additionally, the branching logic within the application was complex and manually copying it required testing each question to ensure all the steps worked correctly.

The online intake applications designed for BALS and TRLS were more complex than we initially anticipated. While we were able to use some of the questions in our existing LSGMI application, much of the application for each partner program was custom built for their needs. BALS and TRLS were excellent partners and provided the problem specific questions they required which made this task easier, but still required significant additional branching logic. Ultimately, it was the best way to develop applications that worked for all three programs, and is the recommended way to proceed for other programs who want to join in the online intake application.

VI.   Strategies to address major challenges

Both of the major challenges we faced, migrating the application manually and building out completely distinct applications for our partners, required more time than we had anticipated to develop the application. Although some of the existing LSGMI application was used by in the BALS and TRLS applications, it required modification for each program. Therefore, future efforts to expand the online intake application for an additional program should plan for about 100 to 150 hours to build, test, and copy the application to the live site.

VII.   Major lessons and recommendations

We would highly recommend that any programs currently using Legal Server strongly consider using the Legal Server online intake module rather than going to another online intake application. The online application and our instance of Legal Server communicate almost seamlessly and did not require us to map fields from the application to Legal Server. Information collected in a field in the online application will transfer to same field in our instance of Legal Server. As long as we selected the field currently in use in our instance of Legal Server for the online application we did not have to take any additional steps for that information to carry over.

Furthermore, legal services programs in Florida that wish to develop an online application should strongly consider adding their application to the one we have developed. This will allow applicants in Florida one access point to apply online for any program rather than having to route the applicant from one application to another once they select their county of residence.

Online Application Screen Shots

Landing Page

Bay Area Legal Services Application

Applicant Information

- **Applicant Contact Information**
- Screening
- Problem Category
- Eligibility
- Demographic Information
- Household Information
- Financial Information
- Problem Description
- Decisive Stage

County of Residence ⓘ

County of Residence*

Pasco ▾

Application for Services

By using this application, you are asking Bay Area Legal Services (BALS) for legal help in **Hillsborough, Manatee, Pasco, Pinellas, or Sarasota County, Florida**. The information you enter will be used by our staff to see whether our program or one of our three regional partners, Gulfcoast Legal Services, Community Law Program, and Legal Aid of Manasota, will be able to assist you. We will keep all of the information you submit completely confidential.

Please note that we cannot accept every case. Unless we tell you that your case has been accepted, **you are not our client.** There is also a possibility that your information may not reach us. Problems such as computer malfunctions or Internet service disruptions could keep us from getting your application. BALS is not responsible for these errors. **Once your application is received, a staff member will contact you at the phone number you provide within 2 business days.** If you do not hear from us within 2 business days, please call **1-800-625-2257** (TTY/ **1-800-955-8771)** and let the operator know you have completed an online intake application. **DO NOT** use this application if you have a case deadline or a legal emergency:

Three Rivers Legal Services Application

STEPS   1. Start   2. Before You Apply   3. Applicant Information   4. Review Application   5. Finished

Applicant Information

Applicant Contact Information

Screening
Problem Category
Eligibility
Demographic Information
Household Information
Financial Information
Problem Description
Decisive Stage

County of Residence⊘

County of Residence*

Bradford ▾

Application for Services

By using this application, you are asking Three Rivers Legal Services (TRLS) for legal help in **Alachua, Baker, Bradford, Columbia, Clay, Dixie, Duval, Gilchrist, Hamilton, Lafayette, Levy, Madison, Nassau, St, Johns, Suwannee, Taylor, or Union County, Florida**. Three Rivers Legal Services staff will use the information you enter to see if we can help you. We will keep all of the information you submit completely confidential.

Please note that we cannot accept every case. Unless we tell you that your case has been accepted, **you are not our client.** There is also a possibility that your information may not reach us. Problems such as computer malfunctions or Internet service disruptions could keep us from getting your application. TRLS is not responsible for these errors. **Once your application is received, a staff member will contact you at the phone number you provide within 2 business days.** If you do not hear from us within 2 business days, please call **866-256- 8091** and let the operator know you have completed an online intake application. **DO NOT** use this application if you have a case deadline or a legal emergency:

Financial Screening

Note: If you are paid by hour, the calculator will help you determine your monthly income.

If you have more than one income please click on the "+" button on the income box to add an income type.

Household Income

Type of Income*	Frequency	Amount		
Income Source ▾	Frequency ▾	$ Amount*	Calculator	- +

Income Source
Alimony
Child Support
Employment
No Income
Pension/Retirement (Not Soc. Sec.)
Rental Income
Social Security Disability
Social Security Retirement
Spouse Employment
SSI
TANF
Unemployment Compensation
Veterans Benefits

$0.00

E

W ses?

- member of your household have.

Expenses include:

- Condo Maintenance/Assessment
- Medical Expenses
- Mortgage
- Rent
- Utilities
- Work-Related Expenses - Child Care
- Work-Related Expenses - Transportation
- Other

Application Submission

STEPS   1. Start   2. Before You Apply   3. Applicant Information   **4. Review Application**   5. Finished

Review Application

oi Review and Submit

Review and Submit Application

Review and confirm your information below. When you are ready click the "Submit Application" button at the end of this page. IF YOU DO NOT CLICK SUBMIT YOUR APPLICATION WILL NOT BE SENT.

If you need to make changes click on the *Applicant Information* tab at the top of this page to access to a specific page and make the changes.

Applicant Information

First Name	test
Middle	N/A
Last Name	test
Residential Address	N/A
City	Miami
State	FL
County of Residence	Miami-Dade
Phone Number(s)	Home Phone: (305) 335-3399
Best Time to Call You	N/A

Instructions to create an Online Intake

1. Go to https://floi-demo.legalserver.org/admin/manage_processes/edit/?process_type=matter and type your information (username, password) to log in.

Florida Online Intake (demo)

Welcome	
Username*	
Password*	

Login »

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2. Click on the **Admin tab** at the top of the page, where you will find all the options available to you as Administrator.

3. Next, click on **Process Management**, there you will find a list of options to edit or create the forms on the intake. From those options look for **Process, Forms, and Profiles** and click to open.

Florida Online Intake (demo)   Anaury Guzman   Logout

Home   Online Intakes   Contacts   Organizations   Reports   Help   Admin

Home » Administration   🔍 Search   ⚠ Help

Administration

Reports

Process Management

General Site Admin

Extended Modules

Timekeeping and Grant Management

Case Transfer and Legalserver Index

Pro Bono Management

User Management

Client/Case Admin

Contact

Calendar Management

Time

Outreach

Document Management

Billing

System Speed

Branch

SEARCH ADMIN OPTIONS   type any keyword   🔍

Case Specific Questions
Add, update and manage case specific questions.

Lookup Merge Queue
View and sort upcoming lookup merge operations.

Lookups
Add and edit lookup information.

Median Income Scales
Edit and Add Median Income Scale information

Poverty Scales
Edit and Add Poverty Scale information

Process Settings
Edit Settings related to processes

Processes, Forms, and Profiles
Processes, Forms, and Profiles

Site-Specific Field Management
Create and manage custom fields specific to this site

Site-Specific Lookup Management
Create, edit, and manage your site-specific lookups.

System Field Management
Manage field properties including field name, field description, help text, using multiple languages.

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4. On the next page, click on **Processes** tab. Here you can edit or create intake process, prescreen process, intake process and, an auxiliary process by clicking the plus sign (+) at the right side of the page. Click the first one to create a **New Intake Process.**

5. Next, on the attributes section complete the information needed and decide which intake forms you want to have on it by grabbing and dragging from the **Disabled Forms** to the **Enabled Forms**.

Once you have enabled the intake forms, by clicking the plus sign (+) on each one you can edit name and position of the form. By clicking [Edit] you can add the specific details you would like to have in the form.

Click **Continue** to complete the process. **Note**: permissions cannot be added to the Intake when you first create it. You have to come back later to set those permissions.

Florida Online Intake (demo)

Anaury Guzman   Logout

Home   Online Intakes   Contacts   Organizations   Reports   Help   Admin

Home » Manage Processes   Search   Help

Process

▾ Attributes

Name*	Online Intake
Complete	● Yes ○ No
Active	● Yes ○ No
Show on Quickbar	○ Yes ○ No
Show Process Link in Module Static Profile	● Yes ○ No
Process Description	

▾ Permissions

Administrator	Default (FULL) ▼
Volunteer	Default (FULL) ▼
User	Default (FULL) ▼
Report Builder	Default (FULL) ▼
Pro Bono Coordinator	Default (FULL) ▼
Probono Restricted Access	Default (NONE) ▼
External Access	● Yes ○ No
Embed	<iframe src="https://floi-demo"
Direct	Direct Link
External Form Theme	Road Trip ▼

Click here to add an additional form

Enabled Forms

- + oi Introduction (Language Selection) [Edit]
- + oi Landing Page [Edit]
- + oi County of Residence [Edit]
- + oi Demographic Information [Edit]
- + oi Household Information [Edit]
- + oi Financial: Income [Edit]
- + Financial: Percentage of poverty & Problem codes [Edit]
- + oi Opposing Party [Edit]
- + oi Review and Submit [Edit]
- + oi E-Transfer Result [Edit]

Disabled Forms
(only active forms are displayed)

- + Introduction (No Attorney) [Edit]
- + oi Family Members [Edit]
- + Online Intake (Exit - Understand Attorney Client Relationship NO) [Edit]
- + QCC Eligibility [Edit]
- + Online Intake (Demographics - Contact Info) [Edit]
- + Online Intake (Demographics - Citizenship Status) [Edit]
- + Online Intake (Exit - Understand Privacy NO) [Edit]
- + Online Intake (Legal Issue - DV Yes - Pre Exit) [Edit]
- + oi Financial: Assistance [Edit]
- + oi Financial: Assets and Expenses [Edit]
- + oi Problem Description [Edit]
- + oi SP Landing Page [Edit]
- + oi CR Landing Page [Edit]
- + oi Exit - Does not agree [Edit]
- + Household Members [Edit]
- + oi Legal Problem [Edit]
- + Online Intake (Legal Issue - Legal Cat) [Edit]
- + Online Intake (Exit - Understand Guarantee NO) [Edit]
- + Introduction (No Guarantee) [Edit]
- + Applicant Conflict Check [Edit]
- + oi Living Arragements [Edit]
- + Adverse Party [Edit]
- + Case Questions [Edit]
- + Disposition Page [Edit]
- + Citizenship & Military [Edit]
- + Quick Case Copy [Edit]
- + FHIP -old [Edit]
- + Eligibility [Edit]
- + Applicant Conflict Results (old) [Edit]
- + Financial Information [Edit]
- + Introduction (Security) [Edit]
- + Demographic Information (Online Intake) [Edit]
- + Legal Triage [Edit]
- + Branch Logic Example (Online) [Edit]
- + Edit DOB [Edit]
- + Pubs [Edit]

Followup Profile	Main Profile ▼

Continue »

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With LSC TIG grant

6. Since you already created your Intake process and enabled some intake forms, now you need to edit those forms to show specific information. Make sure you are under the process tab, look for the Online Intake form you just created and click on the pencil to edit.

Florida Online Intake (demo)

Anaury Guzman   Logout

Home   Online Intakes   Contacts   Organizations   Reports   Help   **Admin**

Home » Administration   Search   Actions   Help

Forms and Processes for Module	Case/Matter ▼

PROCESSES   PRIMARY FORMS   PROFILES   BRANCH LOGIC FORMS   TAB BLOCKS   CASE SPECIFIC FORM FORMS   MENU BOXES

all 18 results   Active = Yes ⊗   Search Name

Name ▼	Type	Process Description	Steps	Complete	Active	Followup Profile	Color Scheme	
Accept or Close Case	Auxiliary	Accept or Close Case link	1	Yes	Yes	Main Profile	Blue	✎
Add activity	Auxiliary	Add activity to a case	1	Yes	Yes	Main Profile	Blue	✎
Add/Edit an adverse party	Auxiliary	N/A	1	Yes	Yes	Main Profile	Blue	✎
Add Household Members	Auxiliary	N/A	1	Yes	Yes	Main Profile	Blue	✎
Add Litigation	Auxiliary	Add Litigation	1	Yes	Yes	Main Profile	Blue	✎
Add Publications	Auxiliary	Add Publications	1	Yes	Yes	Main Profile	Blue	✎
Check for Conflicts	Auxiliary	N/A	2	Yes	Yes	Main Profile	Blue	✎
Close Case	Auxiliary	Close Case	1	Yes	Yes	Main Profile	Blue	✎
Edit Address	Auxiliary	N/A	2	Yes	Yes	Main Profile	Blue	✎
Edit Date of Birth	Auxiliary	N/A	2	Yes	Yes	Main Profile	Blue	✎
Edit Funding Code	Auxiliary	Edit Funding Code link	1	Yes	Yes	Main Profile	Blue	✎
Edit LPC/SPC	Auxiliary	Edit LPC/SLPC	2	Yes	Yes	Main Profile	Blue	✎
Edit Outcomes	Auxiliary	Edit case outcomes	1	Yes	Yes	Main Profile	Blue	✎
Fair Housing	Auxiliary	FHIP Process	1	Yes	Yes	Main Profile	Blue	✎
Online Intake	Intake	N/A	10	Yes	Yes	Main Profile	Blue	✎
Reject Case	Auxiliary	Reject Case link	1	Yes	Yes	Main Profile	Blue	✎
Restrict Case	Auxiliary	N/A	1	No	Yes	Main Profile	Blue	✎
Start New Intake	Intake	N/A	11	Yes	Yes	Main Profile	Blue	✎
No Other Pages								

7. Next, go to enabled forms look for the form you want to personalize and the click on [Edit] next to the form.

8. Once you are in the intake form, go to **Form Elements** section and at the bottom you will find a dropdown menu with elements that can be added to the form. Choose the element you would like to have and click on the **add** button to enable the form. When you finish adding the elements click **Continue** to save.

Note: On each intake form you can edit Name, Form Elements (enable, disable) and, Side/Action Elements.

For detailed instructions on the elements you can add to a form, read Intake Form Elements at the end of this manual.

9. To test the intake, forms, and elements you have created, check the application in a browser. Make sure you are under Process tab look for the intake you created and click on the pencil to edit. Under **Permissions** section, look for **Direct** and click on Direct Link which will open the application on a browser. From this point you can start editing accordingly.

Instructions to add **Branch Logic:**

1. Click on the **Admin tab** at the top of the page, where you will find all the options available to you as Administrator.

2. Next, click on **Process Management,** there you will find a list of options to edit or create the forms on the intake. From those options look for **Process, Forms, and Profiles** and click to open.

3. On the next page, click on **Branch Logic Form** tab. Here you will see a list of branch logic forms that can be used on your intake form when you create a Block. You can either create new branch logic or edit any item of the existing list by clicking the pencil next to it. To create one, hover over the **Action** button at the top right side, and choose **New Branch Logic** from the list.

4. Next, you will land on the page where you specify the branch logic's Name, Form Elements, Side/Action Elements. When you are ready, click **Continue** to finish the branch logic. The branch logic forms you create will be added to the list of Branch Logic Forms, which you will be able to use inside a block on Intake Forms.

Instructions to add a **New Code** to the list:

1. Click on the **Admin tab** at the top of the page, where you will find all the options available to you as Administrator.

2. Next, click on **Process Management**, there you will find a list of options to edit or create the forms on the intake. From those options look for **Process, Forms, and Profiles** and click to open.

3. On the next page, click on **Case Specific Form Forms** tab. Here you will see a list of Case Specific Form Forms that can be used on your intake form when you create a branch logic block. You can either create new Case Specific Form or edit any item of the existing list by clicking the pencil next to it. To create one, hover over the **Action** button at the top right side, and choose **New Case Specific Form** from the list.

4. Next, you will land on the page where you specify the Case Specific Form Name, Case Specific Question Criteria, Form Elements, Side/Action Elements. When you are ready, click **Continue** to finish the case specific form. Case specific forms will be added to the list of Case Specific Form Forms, which you can use inside a block on Intake Forms.

Instructions to edit or add a **lookup list**

1. Click on the Admin tab at the top of the page, where you will find all the options available to you as Administrator.

2. Next, click on **Process Management**, there you will find a list of options to edit or create the forms on the intake. Look for **Lookups** and click to open.

3. You will land on a page that contains a list of lookups category that can be used on your intake form inside of the blocks you create. **Note:** you can only edit the lookups category already built on the system; you will not be allowed to create a new one. To edit one, click on the desired one.

4. Once you are inside the lookup category, a list will show at the bottom of the page with its items. You can either edit or add an item from the list.

   - To add a new one, once you are inside a lookup category, fill out the form and click **Continue** to save.

- To edit an existing one, once you are inside a lookup category, pick one from the list at the bottom of the page, make the new changes and click **Continue**.

Intake Form Elements

You can add to an intake form any of these elements:

Header:
> On the Intake form, go to dropdown menu located at the bottom of Form Elements section, look for **Header** and click on the **add** button. This would add a title that will be displayed on the page when running the application.

Field Set:
> On the Intake form, go to dropdown menu located at the bottom of Form Elements section, look for **Field Set** and click on the **add** button. On the page this will display a box where you can have instructions, buttons, etc. Used for design purposes.

Field:

> On the Intake form, go to dropdown menu located at the bottom of Form Elements section, look for **Field** and click on the **add** button. This is to create specific questions that do not need to implement any logic. It is used to capture the input of the user. There is a field list already built on the system to that you can use or edit.

Block:
> On the Intake form, go to dropdown menu located at the bottom of Form Elements section, look for **Block** and click on the **add** button. Blocks are used to implement any kind of logic, in other words any block you use leads to another page. You can have a block inside a block depending on the logic you want to have.

Instruction:
> On the Intake form, go to dropdown menu located at the bottom of Form Elements section, look for **Instruction** and click on the **add** button. An instruction you use when you have to have text displayed on the page when running the application.

Break/White Space:
> On the Intake form, go to dropdown menu located at the bottom of Form Elements section, look for **White Space** and click on the **add** button. This can be added to the form for design purposes.

List View:
> On the Intake form, go to dropdown menu located at the bottom of Form Elements section, look for **List View** and click on the **add** button. This is used to display a list of specific elements that are already built on the system or have been captured during the application.

Tab Block:

On the Intake form, go to dropdown menu located at the bottom of Form Elements section, look for **Tab Block** and click on the **add** button. Tab Blocks are used to gather and display the information captured during the application.