Intake+

Government Client Portal
Features and Benefits

2019   Eperformance Inc. | Products

Intake+

State of Public Sector

Public sector organizations are under increasing pressure to improve services to the public through;

- Better information services

- Improved client management

- Reduction of bureaucratic red tape.

The public is now demanding that public sector programs provide Internet access to simplify access to services. To meet this challenge organizations requires simple and efficient tools to rapidly deploy electronic services.
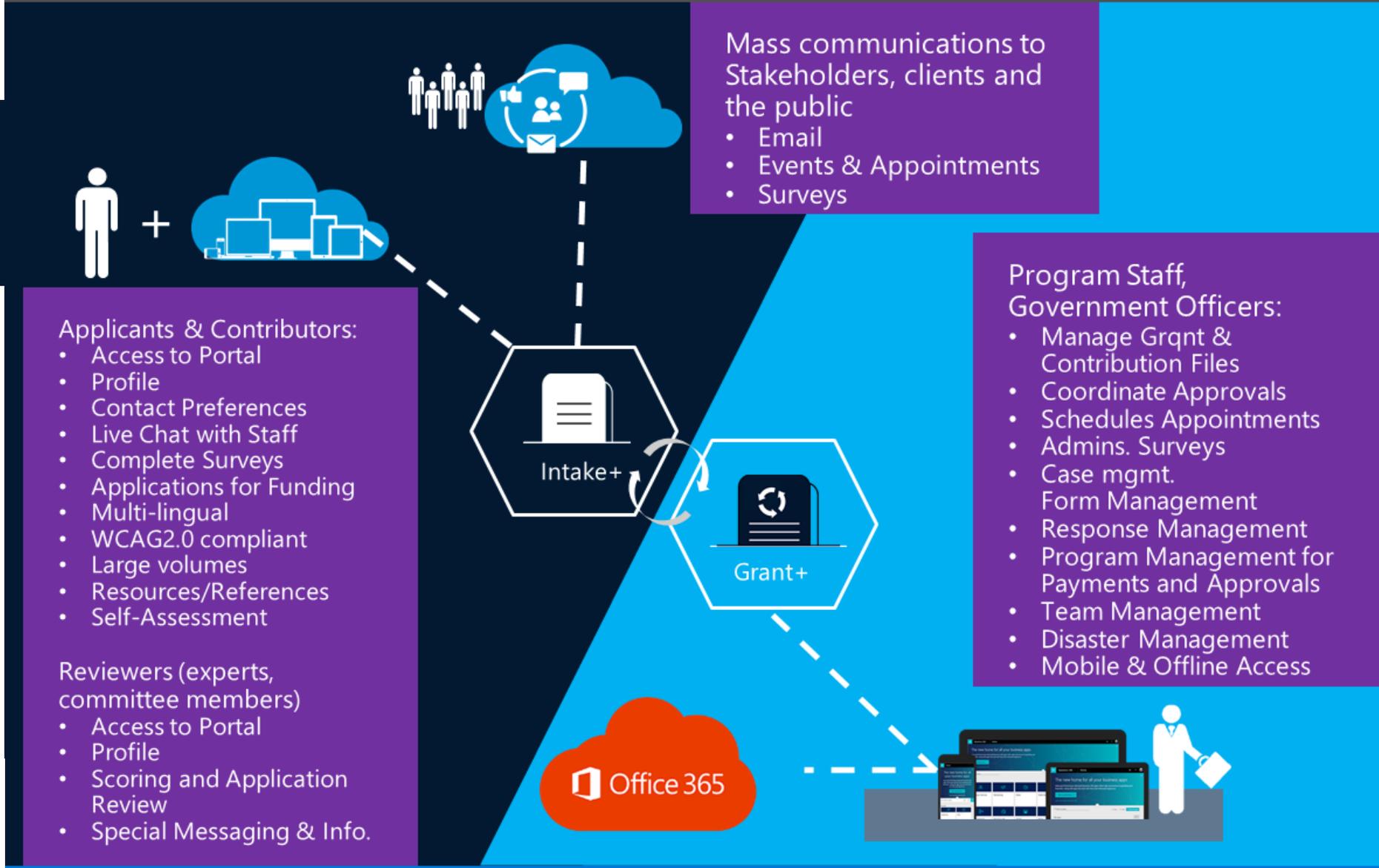
Intake+
An electronic service delivery tool

Eperformance meets this challenge with an advanced electronic service delivery tool. Intake+ is a web service software component designed to provide secure public facing electronic services to clients of any organization. It provides client account management and online forms management services as an add-on capability for organizations wishing to provide self-service client interactions as part of an overall electronic service delivery strategy.

Intake+

Overview

"Intake+ is an advanced tool for extending case management environments, to add public facing electronic services, to rapidly deploy client interaction and submission management capability"

Mass communications to Stakeholders, clients and the public
- Email
- Events & Appointments
- Surveys

Applicants & Contributors:
- Access to Portal
- Profile
- Contact Preferences
- Live Chat with Staff
- Complete Surveys
- Applications for Funding
- Multi-lingual
- WCAG2.0 compliant
- Large volumes
- Resources/References
- Self-Assessment

Reviewers (experts, committee members)
- Access to Portal
- Profile
- Scoring and Application Review
- Special Messaging & Info.

Program Staff, Government Officers:
- Manage Grqnt & Contribution Files
- Coordinate Approvals
- Schedules Appointments
- Admins. Surveys
- Case mgmt.
  Form Management
- Response Management
- Program Management for Payments and Approvals
- Team Management
- Disaster Management
- Mobile & Offline Access

Intake+

Grant+

Office 365

Client Facing   User Access   Web Services   Private, Secure Staff Facing

Intake+ | Submissions

Intake+ has submission features that manage the full exchange of electronic forms supporting electronic services to clients. With this service an organization can rapidly create and publish forms for applications, agreements, payment forms, progress reports and much more.

Key Features

Self Registration/Self Service Portal

Clients can access online forms over the Internet through a secure electronic portal:

- ✓ Public access through 24/7 unattended self-service operation including.
- ✓ Online registration with self assigned user-ID and passwords.
- ✓ Access with any major Web browser (i.e. Internet Explorer, Firefox, etc)

Account Management

Clients can access an organization's program services via a secure workspace:

- ✓ Client portfolios allow clients to access and manage multiple submissions and services
- ✓ Submission management and history features enhance simplify the client access experience

Online Submission Forms

Organizations can create and publish online forms for a wide range of business services:

- ✓ Multi-part online forms including applications, claim submissions, progress reports, and surveys
- ✓ Highly secure processing of submissions
- ✓ Automatic posting of submission status (i.e. approve/rejected) through private applicant access.
- ✓ Automatic generation of rejection /acceptance letters/fax/email
- ✓ Online posting facility for program guidelines and application instructions
- ✓ Multiple language support
- ✓ Online forms designed with field proven, user-friendly, form components
- ✓ Multi-program, multi-form applicant history.
- ✓ Re-use of previously entered data
- ✓ Attach associated electronic files to applications
- ✓ Submission forms can be amended and tracked with version control

Key Features continued

iForms Manager

A fully featured forms manager allows administrators to create design and publish a wide range of submission forms:

- ✓ Includes a rich library of submission forms to support a variety of electronic service delivery types including grants management, regulatory management, competition management, Permit management and much more,

- ✓ Submission forms can be created, copied, and revised with full version control.

- ✓ High integrity data capture is accomplished through validation at the field, section, page, and form levels.

- ✓ Digital Signature strategies can be incorporated to streamline client interaction processes.

- ✓ Submission form tracking and auditing provides statistics to monitor operational performance of the eServices system.

- ✓ Form interaction features enhance the client experience by allowing re-use of date to simplify form completion

Interactive Help

eServices is designed with an intuitive interface with many built in help features including:

- ✓ Revisable interactive online guides describes services, submissions and procedures
- ✓ In context help can be added to forms, pages, sections and even individual line items
- ✓ Online tutorials facilitate training and user uptake

Microsoft Dynamics CRM Interface

eServices is fully integrated with Dynamics CRM providing a powerful public facing capability.

- ✓ Submission viewers provide access to all or part of client submissions forms
- ✓ Data exchange features allow data to be extracted or updated to submission forms
- ✓ Process information such as decision status can be pushed to eService to keep client up to date on progress
- ✓ Full submission control can be managed through CRM forms, business rules, and workflows.

Review Service

Intake+'s Review Service is a related online service that adds the ability to associate third party review and assessment functionality to the form submission process. Internal and external reviewers and domain experts can electronically access submission forms and complete related evaluation forms.

Key Features

Self Registration/Self Service Portal

Reviewers can access the online reviewer portal over the Internet through a secure electronic portal:

- ✓ Public access through 24/7 unattended self-service operation including.

- ✓ Online registration with self assigned user-ID and passwords.

- ✓ Access available via any major Web browser (i.e. Internet Explorer, Firefox, Netscape …)

Online Review Forms

Organizations can create and publish review forms for a wide range of review and assessment purposes:

- ✓ Multi-part online forms can be created including assessments and score sheets
- ✓ Multiple evaluation forms can be incorporated in a review process
- ✓ Secure access strategies can be applied to restrict access to confidential information

Reviewer Portfolios

Reviewers can access an organization's program services via a secure workspace:

- ✓ Reviewer portfolios allow clients to access and manage multiple submissions and cases
- ✓ Reviewer management provides features for assignment, conflict of interest checking, and much more

Intake+: The Benefits

Rapid Implementation & Continuous Improvement

Electronic service delivery services can be designed and deployed rapidly within your organization

Feature Rich

A library of submission forms and features ensures well designed online capture forms

Built on

Microsoft
Dynamics® 365

a world leading Case Management solution