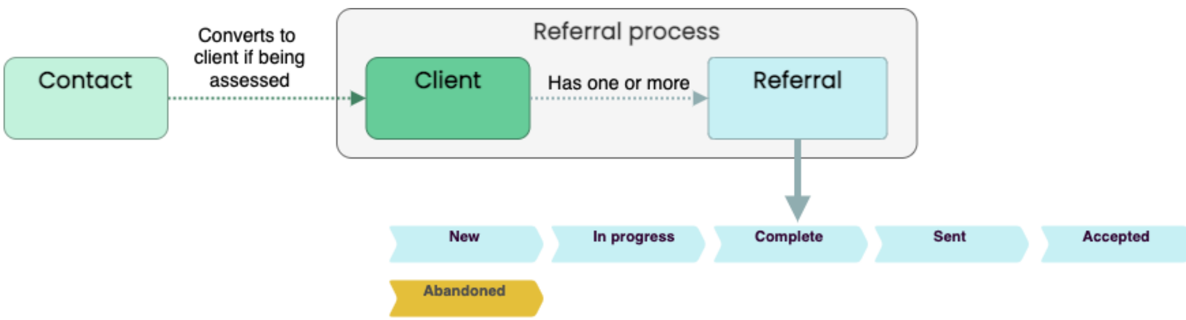
Overview of intake process

Training videos - Overview of Intake Process

As shown below, the consumer journey starts in the Intake Module with the creation of a **Contact** record. If the consumer requires assessment/referral, then their record is converted to a **Client**, and a **Referral** record is automatically created. **Contact**, **Client**, and **Referral** each has its own screen. The **IAR-DST** is done on the **Referral** screen.



Process overview

At any point in time, the **Referral** has a particular status. The status depends on the information that has been entered, until it is sufficient to be **Completed**. Once Completed, it can be **Sent** and **Accepted**. Once an assessment has started, sometimes a client may disengage for various reasons. When that happens, the Referral is closed off by being abandoned and is excluded from reporting. For more information about the referral timeline, refer to the Status of Referrals help page.

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