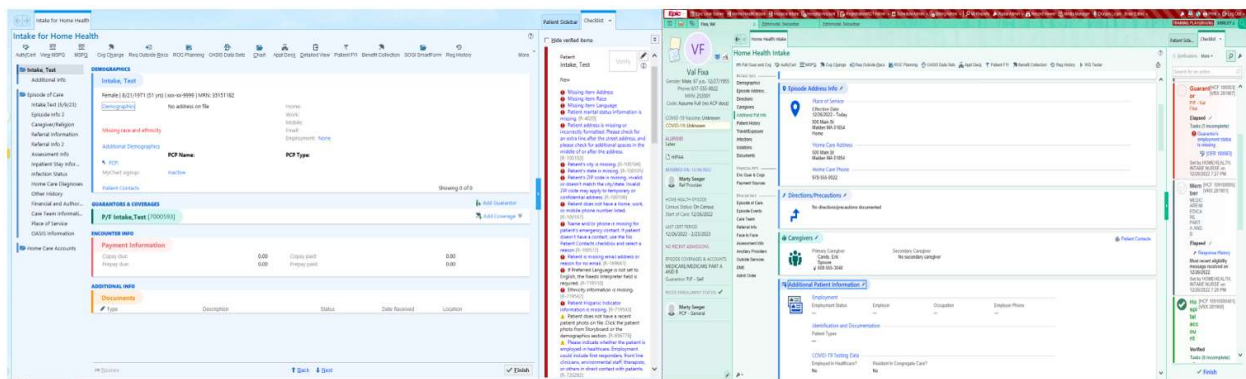# Intake Activity Has a New Look and New Functions

May 24, 2023

Intake is switching to navigator-based Intake activities which offers several key improvements over forms-based Intake activities:
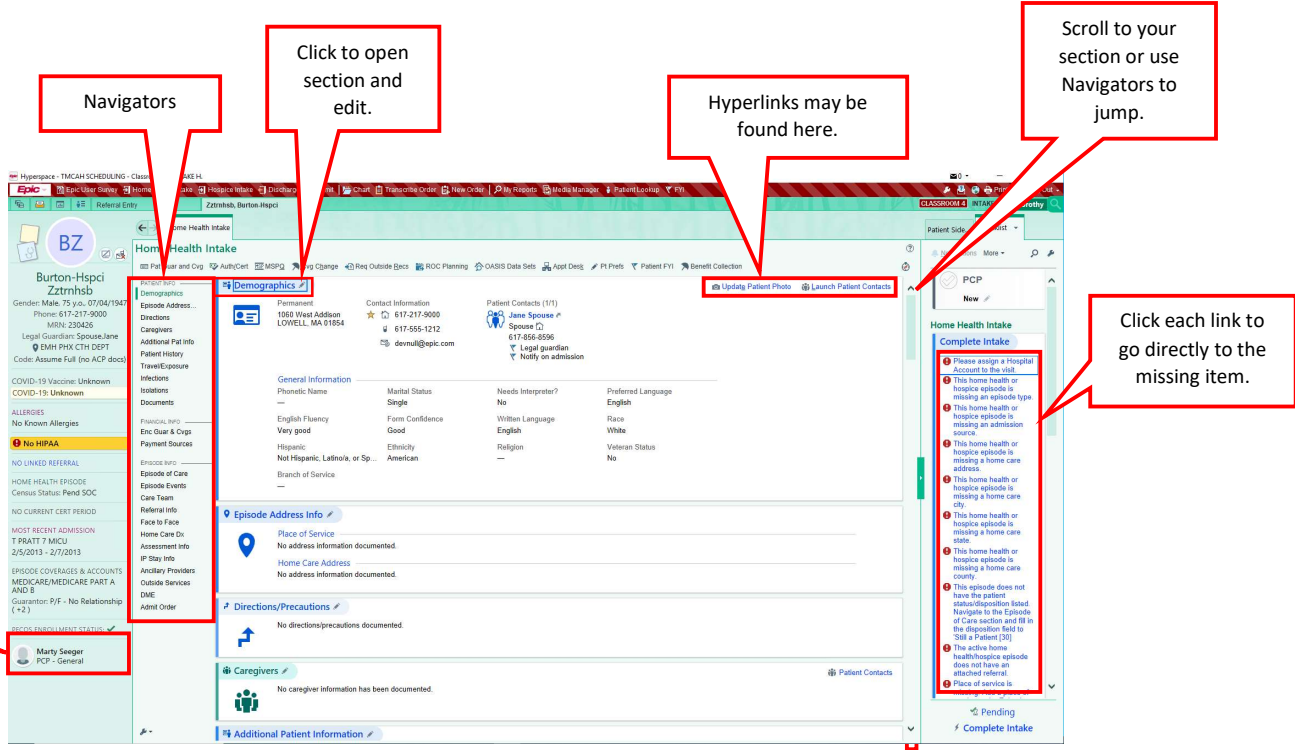


| Before | | After |
| --- | --- | --- |
| Forms-based Intake | | Navigator-based Intake |

- Navigators allow users to access the information they need to complete the intake workflow on a single, scrollable page, rather than jumping between different forms.

- The sidebar Checklist now includes related validation checks. Because the Checklist is updated dynamically as Intake users are working, they can see an up-to-date list of what still needs to be done at any time, rather than having to periodically click the Complete Intake button to see that.

- The sidebar Checklist includes links to take you directly to the missing items.

- The Face to Face now has its own section.

- The PCP can be updated from the storyboard by double clicking in the PCP field.

- There are some customized items like the CNS # that will be found under the Additional Episode Data section which is not shown below.

**Callout annotations (clockwise from top):**

- Navigators
- Click to open section and edit.
- Hyperlinks may be found here.
- Scroll to your section or use Navigators to jump.
- Click each link to go directly to the missing item.
- Double click to update PCP.