

# Intake Checklist

Determining the method(s) of intake most effective for an employer’s population depends on the programs involved, existing and successful processes that can be leveraged, and whether internal resources or external vendors are used. Technology plays an important role, as the methods are only as good as the systems and platforms behind them. The following questions are intended to serve as a high-level checklist to understand your current state, so that you can design a set of options that will achieve your integrated program goals.

KEY QUESTIONS	ANSWERS	COMMENTS
<b>Does your organization currently use a single source of intake for any of the following programs?</b>		
Short-term disability		
Long-term disability		
Family medical leave		
Sick leave		
Leave of absence		
Paid time-off programs		
Workers’ compensation		
EAP/Behavioral health		
Group healthcare		
Disease management		
Wellness		
Attendance or performance management		
Other		
<b>Which of the following methods is your organization currently using for intake? And for which programs?</b>		
Paper reports/forms		
Telephonic reports		
Web portal input		
IVR input		
<b>What are the hours of intake required by your employee population?</b>		
Regular business hours in one time zone		
Extended business hours to cover several time zones		
24/7 availability		
Other		

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<b>Does your organization have any of the following resources that can be leveraged?</b>		
Internal benefits service center employees already familiar with intake		
Dedicated toll-free phone number currently used for specific programs (e.g., STD, WC)		
Corporate intranet site or webpage employees routinely access		
Other		
<b>Which vendors is your organization using for any of the following?</b>		
Telephonic intake		
Web portals		
IVR applications		
Claim systems		
<b>Which internal resources do you need in order to work within your organization to incorporate your integrated program intake into an already existing method?</b>		
Service center		
Information technology		
Communications		
Public relations		
Other		