Pension Action Center -Online Intake form-

September 14, 2022 Chris Mullen, CRM Administrator UMass Boston



Overview

Following a move to a new Salesforce based solution to manage client engagement, the Pension Action Center at UMass Boston sought a client intake form. The form needed to be integrated to Salesforce to allow for the creation on client intake records.



Building Blocks

Evaluating the need and discussing requirements with the team we arrived at a solution comprised of the following components:

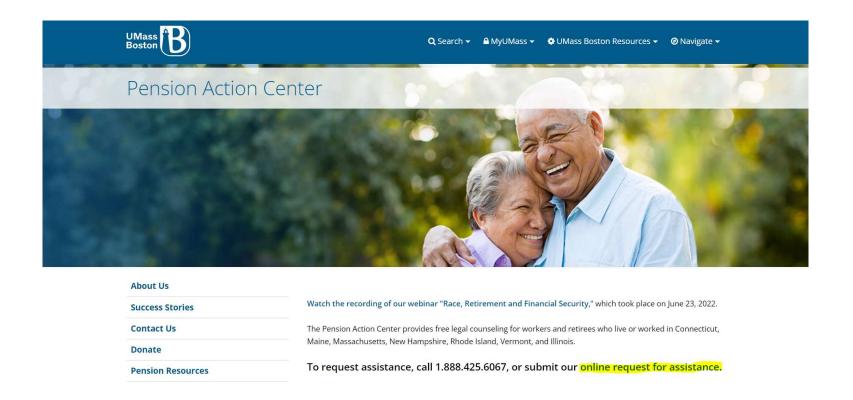






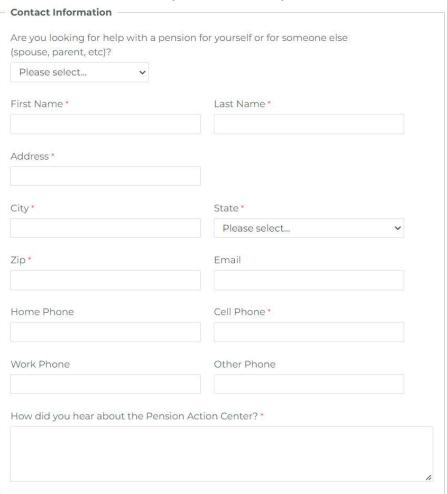


Link on website takes client to intake form



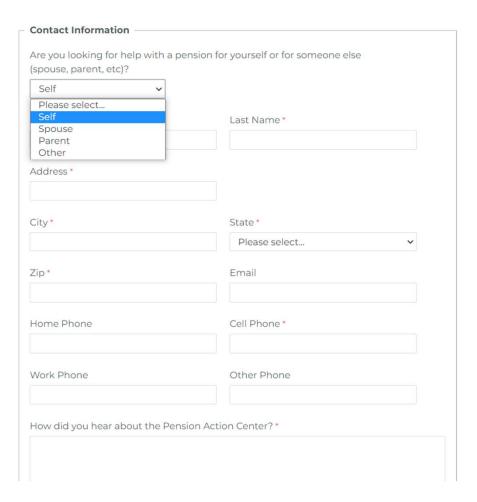


Intake form has been built to capture required intake case data (1/5)



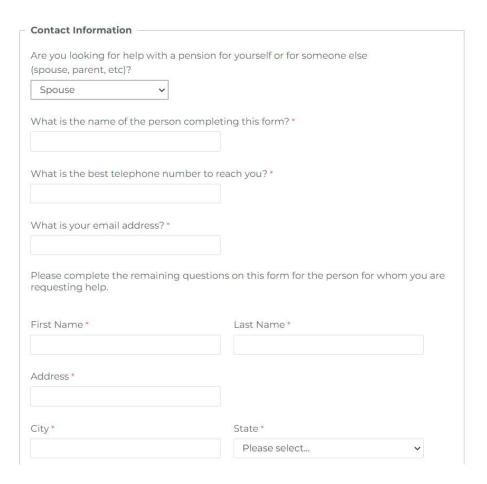


Intake form has been built to capture required intake case data. Data captured is dependent on the individual making the request (2/5)



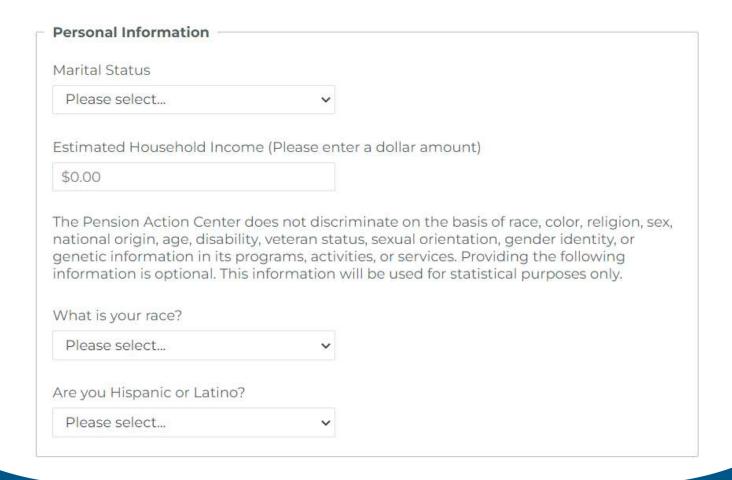


Intake form has been built to capture required intake case data. Data captured is dependent on the individual making the request (3/5)



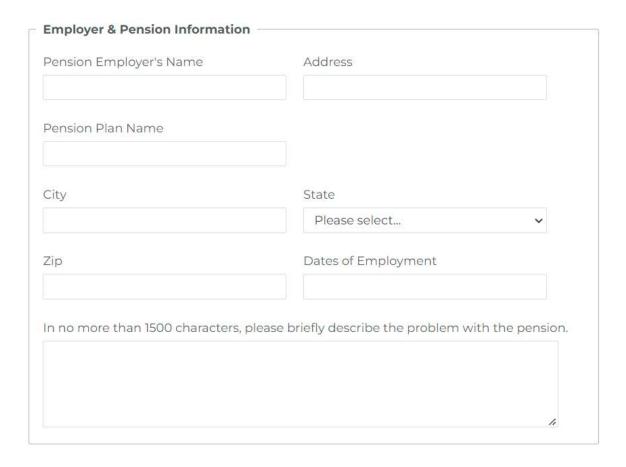


Intake form has been built to capture required intake case data (4/5)





Intake form has been built to capture required intake case data (5/5)





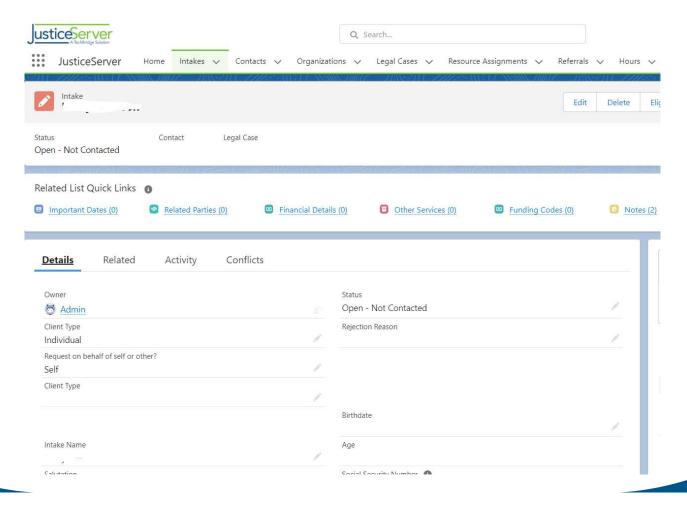
The intake form is connected to Salesforce and fields on the form have been mapped to the Intake object in Salesforce (Justice Server). Clicking "Submit" will send the data to Salesforce (Justice Server).

Pension Employer's Name	Address	
Pension Plan Name		
City	State	
	Please select	~
Zip	Dates of Employment	
In no more than 1500 characte	ers, please briefly describe the problem	with the pensi



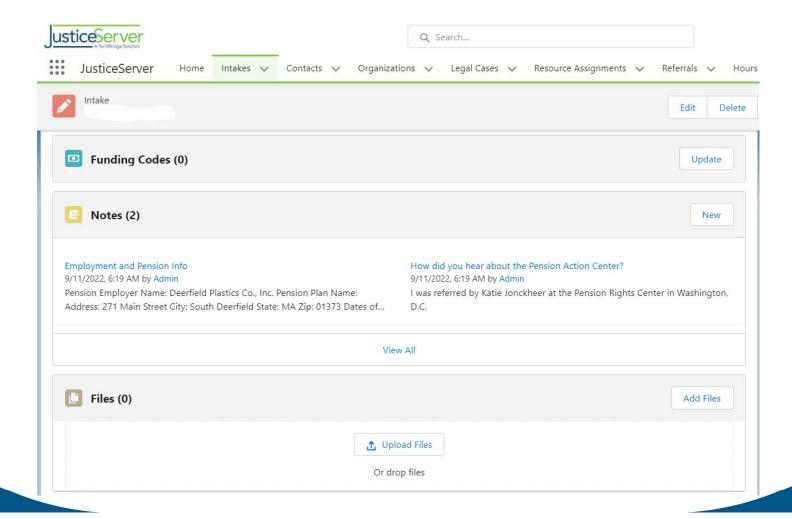


The submission of the online form creates an Intake in Salesforce with the related details of the request.





We add notes to the record to capture certain details of the intake form





*In order accommodate clients that request assistance via phone, we have also created an "internal" intake form with a little more detail, that student interns use to complete an intake for a client.

This form is also integrated to Salesforce/Justice Server and creates the intake record in the same way that the online form does, allowing for an efficient and consistent process for clients requesting assistance in this manner.



What questions do you have about the online Intake form?

