

Pension Action Center -Online Intake form-

September 14, 2022

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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



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Pension Action Center



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Watch the recording of our webinar "Race, Retirement and Financial Security," which took place on June 23, 2022.

The Pension Action Center provides free legal counseling for workers and retirees who live or worked in Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont, and Illinois.

To request assistance, call 1.888.425.6067, or submit our [online request for assistance](#).

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

Contact Information

Are you looking for help with a pension for yourself or for someone else (spouse, parent, etc)?

Please select... ▼

First Name *

Last Name *

Address *

City *

State * Please select... ▼

Zip *

Email

Home Phone

Cell Phone *

Work Phone

Other Phone

How did you hear about the Pension Action Center? *

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

Contact Information

Are you looking for help with a pension for yourself or for someone else (spouse, parent, etc)?

How did you hear about the Pension Action Center? *

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

Contact Information

Are you looking for help with a pension for yourself or for someone else (spouse, parent, etc)?

What is the name of the person completing this form? *

What is the best telephone number to reach you? *

What is your email address? *

Please complete the remaining questions on this form for the person for whom you are requesting help.

First Name * Last Name *

Address *

City * State *

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

Personal Information

Marital Status

Please select... ▼

Estimated Household Income (Please enter a dollar amount)

\$0.00

The Pension Action Center does not discriminate on the basis of race, color, religion, sex, national origin, age, disability, veteran status, sexual orientation, gender identity, or genetic information in its programs, activities, or services. Providing the following information is optional. This information will be used for statistical purposes only.

What is your race?

Please select... ▼

Are you Hispanic or Latino?

Please select... ▼

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

Employer & Pension Information

Pension Employer's Name	Address
<input type="text"/>	<input type="text"/>
Pension Plan Name	
<input type="text"/>	
City	State
<input type="text"/>	<input type="text" value="Please select..."/>
Zip	Dates of Employment
<input type="text"/>	<input type="text"/>
In no more than 1500 characters, please briefly describe the problem with the pension.	
<input type="text"/>	

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).

Employer & Pension Information

Pension Employer's Name	Address
<input type="text"/>	<input type="text"/>
Pension Plan Name	
<input type="text"/>	
City	State
<input type="text"/>	<input type="text" value="Please select..."/>
Zip	Dates of Employment
<input type="text"/>	<input type="text"/>
In no more than 1500 characters, please briefly describe the problem with the pension.	
<input type="text"/>	



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

The screenshot displays the JusticeServer interface, which is a Salesforce-based system. At the top, the JusticeServer logo is visible, along with a search bar and a navigation menu. The navigation menu includes links to Home, Intakes, Contacts, Organizations, Legal Cases, Resource Assignments, Referrals, and Hours. The Intakes link is currently selected, and a dropdown menu is open, showing options like Edit, Delete, and Elic.

Below the navigation menu, the main content area shows the details of an Intake record. The record is titled "Intake" and has a status of "Open - Not Contacted". The record is associated with a Contact and a Legal Case. Below the record title, there are tabs for "Details", "Related", "Activity", and "Conflicts". The "Details" tab is currently selected, showing a list of fields and their values. The fields include:

- Owner: Admin
- Client Type: Individual
- Request on behalf of self or other?: Self
- Client Type: (empty)
- Intake Name: (empty)
- Birthdate: (empty)
- Age: (empty)
- Rejection Reason: (empty)
- Social Security Number: (empty)

The interface also includes a "Related List Quick Links" section with links to Important Dates (0), Related Parties (0), Financial Details (0), Other Services (0), Funding Codes (0), and Notes (2).

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

The screenshot displays the JusticeServer web application interface. At the top, the 'JusticeServer' logo is on the left, and a search bar is on the right. Below the logo is a navigation menu with 'Home', 'Intakes' (highlighted), 'Contacts', 'Organizations', 'Legal Cases', 'Resource Assignments', 'Referrals', and 'Hours'. The main content area is titled 'Intake' and includes 'Edit' and 'Delete' buttons. It features three sections: 'Funding Codes (0)' with an 'Update' button, 'Notes (2)' with a 'New' button, and 'Files (0)' with an 'Add Files' button. The 'Notes' section contains two entries. The first entry, titled 'Employment and Pension Info', is dated 9/11/2022, 6:19 AM by Admin and contains the text: 'Pension Employer Name: Deerfield Plastics Co., Inc. Pension Plan Name: Address: 271 Main Street City: South Deerfield State: MA Zip: 01373 Dates of...'. The second entry, titled 'How did you hear about the Pension Action Center?', is also dated 9/11/2022, 6:19 AM by Admin and contains the text: 'I was referred by Katie Jonckheer at the Pension Rights Center in Washington, D.C.'. A 'View All' link is positioned below the notes. The 'Files' section includes an 'Upload Files' button and a text prompt 'Or drop files'.

JusticeServer
A TechBridge Solution

Search...

JusticeServer Home Intakes Contacts Organizations Legal Cases Resource Assignments Referrals Hours

Intake Edit Delete

Funding Codes (0) Update

Notes (2) New

Employment and Pension Info
9/11/2022, 6:19 AM by Admin
Pension Employer Name: Deerfield Plastics Co., Inc. Pension Plan Name:
Address: 271 Main Street City: South Deerfield State: MA Zip: 01373 Dates of...

How did you hear about the Pension Action Center?
9/11/2022, 6:19 AM by Admin
I was referred by Katie Jonckheer at the Pension Rights Center in Washington,
D.C.

View All

Files (0) Add Files

Upload Files

Or drop files

*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?