

Executive Office of
Aging & Independence
Your Partners in Aging.

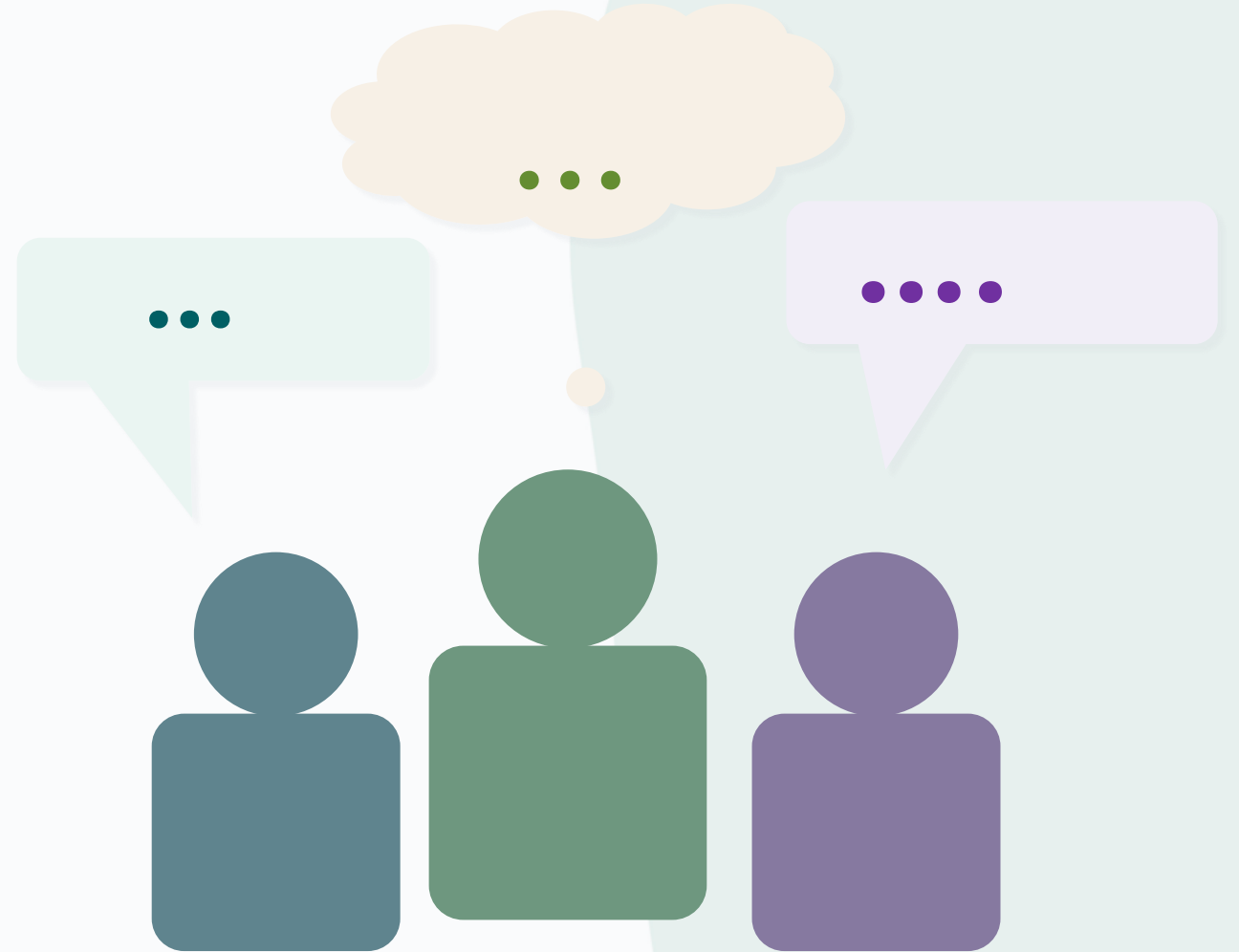


TEAM OPENER

A quick moment to connect before we dive in.

TODAY'S QUESTION

What's one thing your team is doing really well right now?



Today's Agenda

- Call Anatomy
- UAT Testing
- MassOptions Portal Users
- Office Hours
- Questions & Answers (Q&A)

Call Anatomy

A&D

Common Intake
Correspondence
Email
Fax
Field Referral
Follow-up
*** Incoming**
Online Chat
Other Online Tool
Outgoing
Portal
Text Message(s)
Virtual
Voicemail Message
Walk-In
Web Intake

WILD/MICIL

Select Table		Call Type	About Deleting Records...
Call Type			
CallIT	CallType	Active	
52	In Person	☒	
55	Mail/E-mail	☒	
54	No Show	☒	
51	Phone	☒	
58	Professional Consult (Rarely Use)	☒	
53	Research	☒	
59	Supportive Activity	☒	
57	Virtual Visit	☒	
56	Telephonic Skills Training	☐	
		☒	

Call Log in A&D

Save | Save and Close | Close | Print | Open Audits | Format Panels | Disable Timer | Pause | Search for Services | Add New

OK

Call Type Incoming

Caller (Anonymous)

Caller Type (Self)

Consumer (Anonymous)

Referred By

Age Group

Gender Unknown

Disabilities

Call Priority

Start Date/Time 9/9/2026 12:04 PM

End Date/Time 9/9/2026 12:04 PM

Seconds Paused 0

Complete? Yes

Primary Payment Source

Call Topic Count 0

Gender Identity

Format Property List

Activities Add New | Open | Delete | Copy

ADRC Outcomes Open

Topics Select Topics | Delete Topics

Notes

Referrals Generate Activity | Search | Print | Add New | Open | Delete

Related Calls Open

Assessments Compare | History | Add New | Open | Copy From | Print

Service Deliveries Add New | Open

Contact Types

Type of Contact	Definition
Incoming Call	A telephone call initiated by a consumer, caregiver, provider, agency, or other individual and received by staff.
Outgoing Call	A telephone call initiated by staff to a consumer, caregiver, provider, agency, or other individual. Includes returning a voicemail or requested callback.
Email	Contact with or information received from/sent to an individual or organization through email.
Text	Contact conducted through text/SMS messaging.
Chat	Contact conducted through an approved real-time electronic chat or messaging function.
Portal	Contact, request, or information received or exchanged through an electronic portal.
Web Intake	A request for information, assistance, or services submitted through an online/web-based intake form.
Walk-In	An in-person contact initiated when an individual presents at an agency or service location without the contact occurring by phone or electronically.
Fax	Information or correspondence received or sent by fax.
Voicemail	A recorded telephone message received from an individual when staff did not answer the original call. A subsequent return call should be documented as an Outgoing Call when appropriate.
Follow-Up	Subsequent contact related to a previously identified need, request, referral, service, or action.
Scheduled Callback	Contact made at a previously agreed-upon or scheduled date/time to continue assistance or address an identified need.
Warm Handoff	Direct connection of the individual to another staff member, program, agency, or service provider, rather than only providing contact information.
Correspondence	Written communication received or sent regarding an individual, service request, referral, or case that is not better represented by another available contact type.

Contact Types (continued)

Type of Contact	Definition
Field Referral	A referral generated through staff activity in the community or another field-based interaction rather than through a standard intake channel.
Third-Party Referral	A referral initiated on behalf of the consumer by another person or organization, such as a caregiver, provider, hospital, agency, or community partner.
Self-Referral (Common Intake)	A request for information, assistance, or services initiated directly by the consumer through the established Common Intake process.

Type of Contact	Definition
MassOptions / Assisted Intake	An intake or request for assistance received or completed through the MassOptions Assisted Intake process.
Outreach / Community Event	Contact initiated through an outreach activity, presentation, resource fair, community event, or other community-based engagement.

User Acceptance Testing

September 15–23, 2026 • Selected MassOptions portal users from participating ASAPs

UAT will validate the end-to-end referral process before launch.

1

Referral email

Referral emails are received successfully.

2

Routing

Assisted Intake referrals reach the appropriate agency.

3

Data quality

Referral information and consumer content are accurate and complete.

4

Workflow

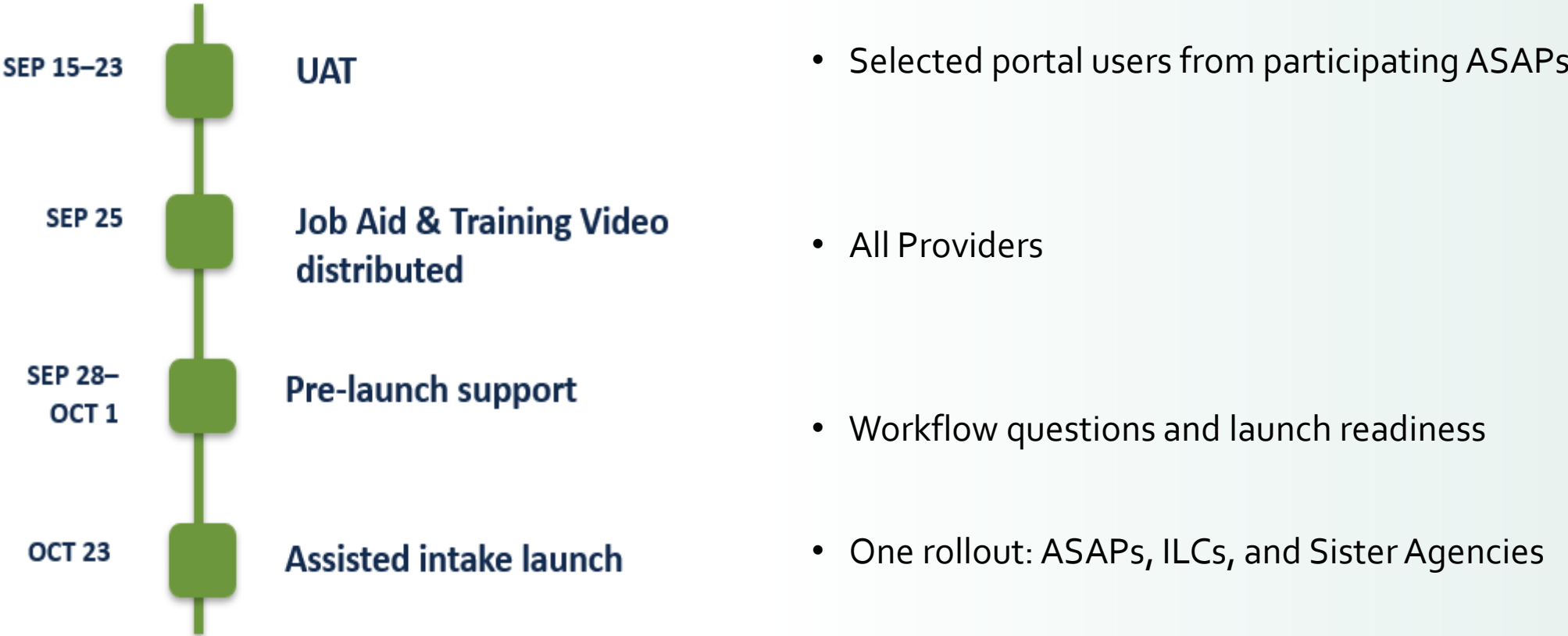
Receiving agencies can retrieve and follow up in a timely manner.

4

UAT findings will identify final workflow or system adjustments needed before launch.

September – October 2026

Launch-Readiness Milestones



Assisted Intake – What Providers Need to Know

Important!

The email is “the referral” – not a notification

Current MassOptions portal users and/or Shared email addresses will receive the referral email.

Provider Focus

- Monitor the email pathway used for referrals.
- Review the referral content for completeness and accuracy.
- Retrieve the referral promptly and complete agency follow-up.
- Raise workflow questions during UAT and pre-launch support.

What the Referral Can Include

What the referral can include

- Referee and primary contact information
- Preferred contact method, language, and accommodation needs
- Help needed across caregiver support, home/community supports, financial/insurance, and medical needs
- Functional and ongoing support needs
- Health coverage information

Use UAT to confirm that this information arrives accurately and supports follow-up.

Returning to the Original Access Structure

2 Portal Users for each agency
&
1 Group Email



Monthly Office Hours

- Drop in ask a question
- All attendees will be asked to also
place question in the chat
- Q&A's will be posted



QUESTIONS

Q & A

ANSWERS





THANK YOU!