

Ohio **SACWIS**

User Guide

Version 1.6
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Chapter 1

Getting Started

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Overview of Ohio SACWIS

Ohio SACWIS is the statewide computer application you'll use in support of your day-to-day child welfare job tasks. The acronym "SACWIS" stands for Statewide Automated Child Welfare Information System.

Purpose and scope of Ohio SACWIS

As its name suggests, Ohio SACWIS is a statewide comprehensive case management computer system designed to automate the delivery of child welfare services. The system was designed to help you and other county, state, and private agency workers share information, manage your workloads, and maintain accurate data for decision making.

Ohio SACWIS is administered by the Ohio Department of Job and Family Services (ODJFS), in partnership with the state's 88 Public Children Services Agencies (PCSAs). The system's mission is to support service delivery and practice for the safety, permanency, and well-being of children and families.

State, county, and agency-related tasks

Ohio SACWIS is used to perform a variety of tasks at the state and county levels, and to enable external agencies to perform key tasks:

- **State.** Ohio SACWIS is used at the state level to manage fiscal issues, generate reports, and administer the system.
- **County.** Ohio SACWIS is used at the county level to:
 - Document intake and case information
 - Determine IV-E eligibility and reimbursement
 - Maintain services
 - Manage provider information, licensing, and payments
 - Process adoptions and subsidies

- Make payments to private agencies
- Maintain private agency service contracts
- **Agencies.** Ohio SACWIS is used to coordinate private agency services.

Benefits of Ohio SACWIS

Ohio SACWIS offers a variety of benefits to caseworkers, supervisors, and agency and federal stakeholders. Among these benefits are the following:

- Provides quick access to reliable data to support decision making and case planning activities at case, county, and state levels
- Reduces paperwork and repetitive typing so more time can be spent on other caseworker activities
- Enables statewide access to case and client information for intake, investigations, and child protective services
- Interfaces with other systems, making information easily accessible when you need it
- Assists county staff in managing their workloads
- Provides historical analysis and predictive trend analysis tools to ensure critical service availability
- Provides accurate and current data to assist in decision making and program modification
- Complies with federal, state, and agency reporting requirements.

This chapter explains:

- Introduction to the user interface
- How to use screen conventions
- How to navigate the system
- How to add and delete records
- How to use online support tools
- How to use WBT
- How to use online help
- How to link to the Family, Children and Adult Services Manual (FCASM)

Using Ohio SACWIS on the job

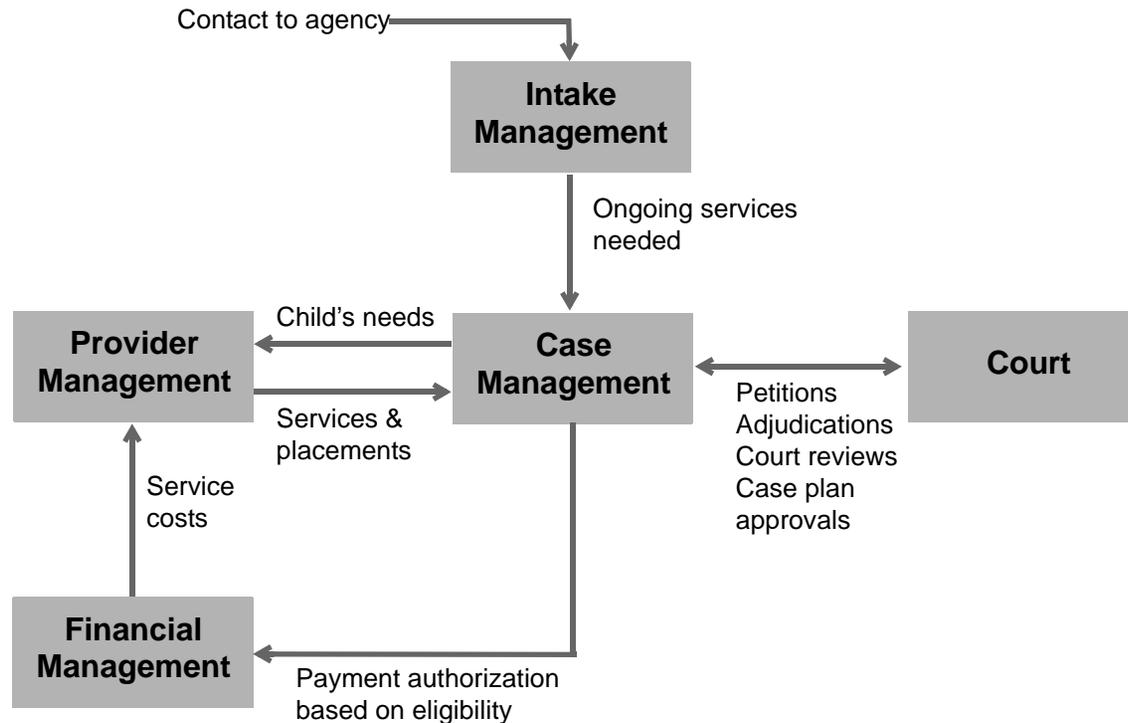
SACWIS is a task-based system in which the flow of information within the system supports the way you perform your job tasks. The system is organized around five functional areas:

- **Intake.** For recording reports and referrals. This is the area through which all child and family information enters the system.
- **Case Management.** For recording assessments, investigations, case services, court activities, placements, and so on.
- **Provider Management.** For maintaining information about resource providers, like names, addresses, staff members, home studies, certifications, service credentials, and so on.

- **Financial Management.** For managing fiscal activities, like service authorizations, rates and ceilings, provider rosters, payment processing, eligibility determinations, and so on.
- **Court Processing.** For documenting a variety of legal activities affecting the PCSA such as recording hearings, motions, complaints, and rulings, and documenting petitions, adjudications, and court reviews.

In addition, **Administration** tasks are performed by system administrators to support system maintenance. They include staff management, security maintenance, utility management tasks, and so on.

The diagram below illustrates the flow of information within the system when contact is initially made with an agency. Your job probably requires you to work mostly in only one of these areas.



Introduction to the user interface

The Home screen is the first thing you'll see after logging on to Ohio SACWIS. It's the starting point for all key functions in the system. You can easily access the Home screen from anywhere within the system by clicking the Home tab or the home header link. The Home screen contains several areas:

- **Header links.** These links appear at the top right of all screens and enable you to search for a person, intake, case, provider, or employee; access help and training; change profiles; or log off the system.
- **Tabs.** The primary tabs located below the Ohio SACWIS title provide access to key system functions: Intake, Case, Provider, Financial, and Administration. Additional secondary tabs are located just below this providing access

to individual data screens within each functional area of SACWIS. They change based on the functional area you are working in.

- **Tickler Summary.** A list of current ticklers is displayed here. Ticklers remind you of case-related tasks waiting to be completed in the system.
- **Message Board.** A list of job-related items that require your immediate attention is displayed here. This includes broadcast, agency, and state messages.
- **Footer links.** These links at the bottom left of the screen enable you to go to the Home screen, access help and training, access privacy and security, or display the agency address book.

The screenshot shows the Ohio SACWIS Home screen. At the top, there is a header with the logo and user information. Below the header is a row of tabs: Home, Intake, Case, Provider, Financial, and Administration. Underneath these are secondary tabs: Desktop, Approvals, and Assignments. The main content area is divided into three sections: Tickler Summary, Message Board, and a footer with navigation links. Callout boxes with arrows point to various elements, providing instructions on how to use them.

Click this row of tabs to access Desktop-, Approvals-, and Assignments-related tasks. (Points to the secondary tabs: Desktop, Approvals, Assignments)

Click here to go to the Home screen. (Points to the Home tab)

Click here to search for a person, intake, case, provider, or employee. (Points to the search link in the header)

Click here to access help and Web-based training. (Points to the help & training link in the header)

Click here to log in for another agency. (Points to the switch profiles link in the header)

Click here to log off the system. (Points to the log off link in the header)

Click this row of tabs to access the Home, Intake, Case, Provider, Financial, or Administration screens. (Points to the primary tabs: Home, Intake, Case, Provider, Financial, Administration)

Click here to view a summary of ticklers. (Points to the Tickler Summary section)

Click here to view messages, including broadcast, agency, and state messages. (Points to the Message Board section)

Click here to access the Home screen, or help & training, privacy and security, or the agency address book. (Points to the footer navigation links)

Click here to access help or to view all ticklers. (Points to the help link in the Tickler Summary section)

How to use screen conventions

Screens contain a variety of different types of information. Some of the conventions you will use throughout Ohio SACWIS include the following:

- **Path.** Displays a list of previous screens visited that got you to the current screen.
- **Header information.** Displays details of this record.
- **Calendar.** Provides an easy way to select calendar dates.
- **Drop-down list.** Provides an easy way to select a predefined value.
- **List box.** Allows you to add or remove multiple values in a field.
- **Text field.** Provides a way to enter up to 3,000 characters

(approximately 600 words) of narrative text. Some fields will accept up to 10,000 characters.

- **Scroll bar.** Allows you to view additional text that may not be viewable.
- **Check box.** Allows you to select one or more values.
- **Apply, Save, OK, Cancel, and Close Buttons.** Allow you to act on information entered on a screen.
 - Click **Apply** to save your changes and stay on the current screen.
 - Click **Save** or **OK** to save your changes and return to the originating screen.
 - Click **Cancel**, then **OK** to return to the previous screen without saving any changes.
 - Click **Close** to return to the originating screen.

Click the calendar button to easily display and select calendar dates. This usually defaults to the current date.

View header information describing details of this record.

View an area containing related fields of information.

Click the drop-down list to display predefined values.

Click the buttons in this list box to add or remove values for this field.

Enter narrative text here. Click Spell Check to verify text spelling.

Click the scroll bar to view more text displayed in this field.

Click inside a check box to select it. Click again to clear the check box.

Click Apply to save changes and continue viewing this screen. Click Save to save changes and return to the previous screen. Click Cancel to return to the previous screen without saving changes.

The screenshot shows the 'Basic' tab of a record. At the top, there are tabs for 'Reporter', 'Participants', 'Additional', 'Allegations', and 'OHC'. The 'Basic' tab is active. Fields include: 'Screener Name', 'Intake ID', 'Received' (with a date and time picker), 'Intake Category' (drop-down), 'Intake Types' (list box), 'Intake Narrative' (text area with a scroll bar), 'Living Arrangement at Time of Intake' (drop-down), and 'Intake Completed by Screener' (checkbox). At the bottom are 'Apply', 'Save', and 'Cancel' buttons. Callouts point to these elements with descriptive text.

How to navigate the system

Ohio SACWIS provides various ways to help you navigate the system. These include tabs and links that take you to a specific screen to perform a task. Ohio SACWIS also contains different types of screens to assist you in navigating the system. These include workload, overview, list, detail, and search screens.

Caution

When using Ohio SACWIS, *do not* use the Back and Forward buttons in your browser. In addition, do not use the F5 key. Use only the buttons and links within the application to move from one screen to another. You might find it easier to hide the browser navigation bar while you work in Ohio SACWIS. To

do this in Internet Explorer, right-click on the tool bar, then left-click on **Standard Buttons**.

Using primary and secondary tabs

From the Home screen, click one of the primary tabs in the top row to access a main function such as Intake, Case, Provider, Financial, or Administration. Notice that secondary tabs are displayed below the primary tabs. Click a secondary tab to open main areas of work within a functional area.

Click a link in the menu on the left to open a search or list (filter) screen.

Click a secondary tab to open a main work area within a function.

Click a primary tab to access a main function.

	Intake ID	Intake Category	Date/Time Received	Screener Name SDM Name	Intake Status	Status Date/Time
report link	17350	CA/N Report	01/27/2006 10:18 AM	Karen, Schwartz01 Aband01 Jeanne	Screened In	02/03/2006 10:47 AM
report link	17474	CA/N Report COUNTYPRIORITYTWO	01/30/2006 11:00 AM	Dawn, Boudrie02 Boudrie01 Dawn	Screened In	01/30/2006 3:01 PM

Using links

Links are used throughout Ohio SACWIS to navigate to functions, specific records, or to view previously entered information. A link is displayed as blue underlined text (example: [select](#)). Notice that links are displayed at the top and bottom of the Home screen. They are also displayed in many different places on screens throughout the system. Common links include edit, view, select, delete, copy, and so on.

On many secondary tabs, the tertiary menu of links appears in a blue box on the left side of the screen. It is also sometimes called the “left-hand navigation.” This menu allows you to work on certain kinds of records within the work area identified by the secondary tab.

Click these links to perform key tasks.

Click these links to work on other related case records.

Click these links to edit, view, or generate a report for these records.

The screenshot displays the Ohio SACWIS interface. At the top, there is a navigation bar with tabs: Home, Intake, Case, Provider, Financial, and Administration. Below this is a sub-navigation bar with: Workload, Court Calendar, and Placement Requests. The main content area shows details for Case ID 15054, Case Name Moor, Randy. It includes a 'Safety Assessment Filter Criteria' section with a date range and a 'Sort Results By' dropdown set to 'Safety Assessment ID (Asc)'. Below this is a table of Safety Assessment results. A left-hand navigation menu is visible, with 'Safety Assessment' highlighted. A callout box points to this menu with the text 'Click these links to work on other related case records.' Another callout box points to the table with the text 'Click these links to edit, view, or generate a report for these records.'

	Safety Assessment ID	Status	Date of Approval	Safety Response	Agency Created	
edit report	15007	In Progress	10/24/2005	In Home SP	Adams County Children Services Board	delete
edit report	15007	Pending Approval	12/29/2005	In Home SP	Adams County Children Services Board	
view report	15007	Approved	01/03/2006	In Home SP	Adams County Children Services Board	
view report	15564	Approved	01/06/2006		Adams County Children Services Board	
view report	15670	Approved	01/06/2006	In Home SP	Adams County Children Services Board	
view report	16038	Approved	01/20/2006	In Home SP	Adams County Children Services Board	
edit report	15561	In Progress			Adams County Children Services Board	delete
edit report	15559	In Progress			Adams County Children Services Board	delete
edit report	15746	In Progress		In Home SP	Adams County Children Services Board	delete

Using workload screens

Workload screens make it easy for you to view your work items by listing the cases or providers that are assigned to you. When you click the **Case** and **Provider** tabs, you see workload screens.

Workload screens allow you, as a worker, to open a specific case or provider record. As a supervisor, you can use the workload screens to view a list of the workers in your unit and the cases assigned to each worker.

The screenshot shows the Ohio SACWIS Case Workload interface. At the top, there is a navigation bar with tabs for Home, Intake, Case, Provider, Financial, and Administration. Below this is a sub-navigation bar with Workload, Court Calendar, and Placement Requests. The main content area is titled 'Case Workload' and includes a 'Caseworker' dropdown menu, a 'Sort By' dropdown menu set to 'Case Name Ascending', and a 'Filter' button. A list of caseworkers and their assigned cases is displayed below. Annotations with arrows point to specific elements: 'Click here to select a worker and then click Filter. This allows you to view specific worker cases within the hierarchy if you are a supervisor.' points to the Caseworker dropdown; 'Click here to display the Case functional area.' points to the Case tab; 'Click here to display the case workload.' points to the Workload tab; and 'Click here to display the case workload for a specific caseworker.' points to the expandable arrow next to 'Miller, Duncan'.

Annotations:

- Click here to select a worker and then click Filter. This allows you to view specific worker cases within the hierarchy if you are a supervisor.
- Click here to display the Case functional area.
- Click here to display the case workload.
- Click here to display the case workload for a specific caseworker.

Caseworker	Case ID	Open Date	Assess/Invest
Miller, Duncan	Adams, John [15117]	Open 11/14/2005	Assess/Invest
	Baccus, Loretta [15616]	Open 02/08/2006	Assess/Invest
	Beth, Aber [15395]	Open 01/16/2006	Adoption
	Bowling, Brenda [15615]	Open 02/08/2006	Assess/Invest
	Brian, Henry [15296]	Open 12/23/2005	Assess/Invest
	Charles, Mike [15119]	Open 11/15/2005	Assess/Invest
	Day, Cloudy [15496]	Open 01/24/2006	Assess/Invest
	Dempsey, Darla [15617]	02/08/2006	
	Dravid, Rahul [15191]	Open 11/17/2005	Assess/Invest

Using overview screens

Ohio SACWIS uses overview screens to provide an entry point for case or provider records. Overview screens provide a central location for displaying and accessing related information concerning a case or provider.

Notice that a menu of links is displayed on the left side of this overview screen providing access to a variety of tasks or associated records. In the example below of the Provider Overview screen, you can click on any of the links to display further information on this provider. The Case Overview screen has similar features.

The Overview screen displays a summary of the record. You can access this screen from the first link on the left.

The header identifies the provider record you are viewing.

Click a link to view or record more information about this record.

The screenshot shows the Ohio SACWIS interface. At the top, there is a navigation bar with links for home, search, help & training, switch profile, and log off. Below this is a red banner with a maintenance notice: "SACWIS will be unavailable after 11:00 P.M. June 9, 2005 and remain under maintenance until 6:00 A.M. June 10, 2005." The main navigation menu includes Home, Intake, Case, Provider (selected), Financial, and Administration. Under the Provider menu, there are sub-links for Workload, Directory, Recruitment, Inquiry, Training, Contracts, and Agency Certifications. On the left side, a vertical menu lists various links: Provider Overview (selected), Activity Log, Linked Inquiries, Skills, Training, Acceptance Criteria, Description of Home, Description of Family, Home Study, Approval/ Certification, Contracts, Service Credentials, Placements, CA/N Incidents, Rule Violations, Waiver/ Variance, and Potential Matches. The main content area displays the "Provider Overview" for "Stubbs, Mike Drew". It includes fields for Provider Name, Primary Address, Provider Status, and Primary Contact. There is a "Provider Actions" section with a link for "Provider Information". Below this is an "Approval/Certification Information" table. At the bottom, there is a "Family Listing Narrative" field and an "Updated as of:" timestamp.

Provider Type	Status	Approval/Certification Period	Agency
Adoptive Home	Approved	09/22/2004 - 09/21/2010	Franklin County
Foster Home	Certified	09/22/2004 - 09/21/2006	Franklin County

Updated as of: 06/28/2004 10:34 A.M.

Using list screens

A list, or filter, screen usually appears from a Case or Provider Overview screen when you click one of the links in the menu on the left. This type of screen lists the records of the type indicated in the link.

The system presents the records according to pre-defined default criteria, which may be more records than you want to view. The top portion of a list screen includes a Filter Criteria area. You use the fields in the Filter Criteria area to limit the display of records, which allows you to filter the display of records that appear in the table below.

Each row in this table represents a single record. To open the record, click the **view** or **edit** link that appears in the left-most column. List screens generally include an “add” button below

this list of records. Click this button to create a new record. Either way, the system displays a detail screen, which represents the details of a given record.

Select filter criteria above and click here to limit the display of records.

Click here to select a specific record from the list.

Click here to add a new record.

OHIO SACWIS @SYS_TYPE@ home search help & training switch profiles log off
Logged In: Smith, Tim [Adams County Children Services Board]

Home Intake Case Provider Financial Administration
Workload Court Calendar Placement Requests help

Case Overview
Activity Log
Intake List
Safety Assessment
Forms/Notices
Safety Plan
Family Assessment
Ongoing Case A/I
Specialized A/I Tool
Law Enforcement
Justification/Waiver
Case Services
Court
Initial Removal
Placement Request
Placement
Visitation Plans
Independent Living
Case Plan
Case Review/SAR
Reunification Assessment
Case Conference Note
ICPC/ICAMA
Adoption
Case Closure

Case ID: 15054 Case Name: Moor, Randy Case Status: N/A Case Category: Ongoing

Safety Assessment Filter Criteria
Date Range: From: To:
Sort Results By: Safety Assessment ID (Asc)

Filter Clear Form

Safety Assessment
Result(s) 1 to 7 of 7 Page 1 of 1

	Safety Assessment ID	Status	Date of Approval	Safety Response	Agency Created	
edit report	15007	In Progress	10/24/2005	In Home SP	Adams County Children Services Board	delete
edit report	15007	Pending Approval	12/29/2005	In Home SP	Adams County Children Services Board	
view report	15007	Approved	01/03/2006	In Home SP	Adams County Children Services Board	
view report	15564	Approved	01/06/2006		Adams County Children Services Board	
view report	15670	Approved	01/06/2006	In Home SP	Adams County Children Services Board	
view report	16038	Approved	01/20/2006	In Home SP	Adams County Children Services Board	
edit report	15561	In Progress			Adams County Children Services Board	delete
edit report	15559	In Progress			Adams County Children Services Board	delete
edit report	15746	In Progress		In Home SP	Adams County Children Services Board	delete

Add Safety Assessment

Using detail screens

Detail screens provide a way for you to view or enter a variety of different types of information in Ohio SACWIS. Some detail screens contain additional tabs at the top of the screen, allowing you to view or enter additional details for a record.

Notice that the path, positioned below the Ohio SACWIS title, describes the screens previously visited in this task.

The system ensures that you enter the information it requires for accurately processing information. It accomplishes this in three ways:

- **Fields required to create a new record.** The system requires you to complete certain fields in order to begin the record and save it to the database. The labels for these required fields appear in bold type with an asterisk (*).

- **Conditionally required fields.** The system may require either one field or another. Or it may require one field if another field is completed. In these situations, the field labels are not in bold. However, the system displays an error message if either of the fields is left blank.
- **Fields required for approval.** Larger records, like case reviews and assessments, must be fully complete before a supervisor or reviewer can approve them. For these, the system displays a **Validate for Approval** button, which allows you to display fields in error. Details must still be completed before you can submit the record for approval.

View the path taken to see previous screens visited.

Enter data in all fields with an asterisk (*). These are required fields.

Click these tabs to open other detail screens and enter additional details for this record.

Case > Workload > Independent Living

Independent Living		Goals	Readiness Review
Case ID:	15054	Case Status:	N/A
Case Name:	Moor, Randy	Case Category:	Ongoing
Independent Living			
Agency:	Adams County Children Services Board		
Child Name:	Moore, Mandy	DOB:	04/05/1975
Effective Date: *	02/12/2006	Status: *	Pending
Youth Information: *			
Date Referred/Emancipated: *		Anticipated Emancipation Date:	
Assessment/Plan Information			
IL Skills Assessment Completed: *		Date Assessment Completed:	
IL Plan Completed: *		Date Plan Completed:	
Input to IL Assessment/Plan			
Input was Received from the Youth When Completing: *		Activity	Name
Input was Received from the Youth's Case Manager when Completing: *			
Input was Received from the Youth's Significant Other when Completing: *			
Input was Received from the Youth's Substitute Caregiver when Completing: *			
Input was Received from the Youth's Parent/Guardian/Custodian when Completing: *			
Youth is Currently Receiving IL Services/Training: *			

Using search screens

A search screen allows you to find specific records in Ohio SACWIS. Since this is a statewide system, most searches look for records entered by any agency in the state. The system displays a search screen when you:

- Click the **search** header link from anywhere in the system. From this feature, you can search for persons, intakes, cases, providers, and ODJFS or agency employees. You cannot, however, add new records from search screens launched from this link.
- Click a **Search** button on a detail screen to associate another record with it. For example, when you add members to a case, you perform a person search to locate or add the person record, then select that person as a member of the case from which you launched the search.

- Click the **Directory** secondary tab on the **Provider** tab. This screen allows a provider worker to locate providers, either to view the provider record or to match the provider with a client’s needs.
- Click the **AGENCY SEARCH** footer link. This screen allows you to find public or private agencies anywhere in the State or in a specific county.

For now, it’s enough just to know that you will be using search screens. For more information on how to search and find information in Ohio SACWIS, refer to the **General Tasks** chapter in this user guide.

Click here to begin your search.

Enter your search criteria here.

Click here to execute the search.

View your search results here. Click the view or edit link to open the record. Click the select link to select the record and return to the previous screen.

OHIO SACWIS Ohio SACWIS Search

home | **search** | help & training | switch profiles | log off

Logged In: Smith, Tim [Adams County Children Services Board]

Person Search | Intake Search | Case Search | Provider Search | Employee Search

Person Search Criteria

Last Name: AKA Sounds Like

First Name: [HINT: AKA / 'Sounds Like' applies to last/first/middle name only. Wildcard (%) search & 'Sounds Like' cannot be used together.]

Middle Name:

DOB: or From Age: To Age:

Gender: Race: Person ID:

Advanced Search Criteria

Sort Results By:

Person Search Results

Result(s) 1 to 2 of 2 Page 1 of 1

	Person ID	Name	Address	Gender	Age	DOB
edit	32140	Jones, Sammie		Unknown	10	10/25/1995
edit	32063	Jones, Sam		Male	6	01/01/2000

How to add and delete records

Adding records

Records in Ohio SACWIS are added from within the functional areas. For example, new intake records are added from the **Intake** tab. Case records are added from the intake linking process. Person records are added from the case or provider records with which they are associated. And new providers are added on the **Provider** tab, either through the provider inquiry process (ODJFS providers) or from the provider directory (non-ODJFS providers).

The system always requires you to conduct a search before you add a new record, to prevent the accidental duplication of

records in the system. If you discover duplicate records, contact your help desk.

Deleting records

If a record can be deleted, a **delete** link appears in the right-most column of the table that lists the record. This includes the tables that appear on list screens or on detail screens. In general, a record can be deleted if it has not been completed or approved. That is, the status of the record is “Draft,” “In Progress,” “Pending,” and so on, depending on the type of record.

Often you are associating one record with another, in which instance you are deleting only the association, not the record itself.

The screenshot shows the 'Case > Workload > Case Information' screen. It has four tabs: 'Case Detail', 'Members', 'Relationships', and 'Associated Persons'. The 'Case Detail' tab is active, showing Case ID: 8016569 and Case Name: Inman08, Matthew. The 'Members' tab is also visible, showing a 'Member List' table with columns: CRP, Name, DOB, Gender, Begin Date, and delete. The table contains three rows of member data. Annotations with arrows point to the 'edit' links in the first two rows and the 'delete' link in the third row. Below the table is an 'Add Member' button. At the bottom of the screen are 'Apply', 'Save', and 'Cancel' buttons.

CRP	Name	DOB	Gender	Begin Date	delete
edit <input checked="" type="radio"/>	[H] Inman08 , Matthew	07/13/1972	Male	04/18/2006	delete
edit <input type="radio"/>	Inman08 , Nellie	03/13/1997	Female	04/18/2006	delete
edit <input type="radio"/>	Inman08 , Stephanie	07/15/1999	Female	04/18/2006	delete

Annotations:

- Click here to open and edit the record. (points to the first 'edit' link)
- Click here to add a record. (points to the 'Add Member' button)
- Click here to delete a record. (points to the 'delete' link in the third row)

How to use online support tools

Ohio SACWIS includes online support tools, which help you understand the system and make decisions about what information to enter.

The Ohio SACWIS Web-based training (WBT) program gives you or a staff member the opportunity to learn to use Ohio SACWIS in a controlled way, at your own pace.

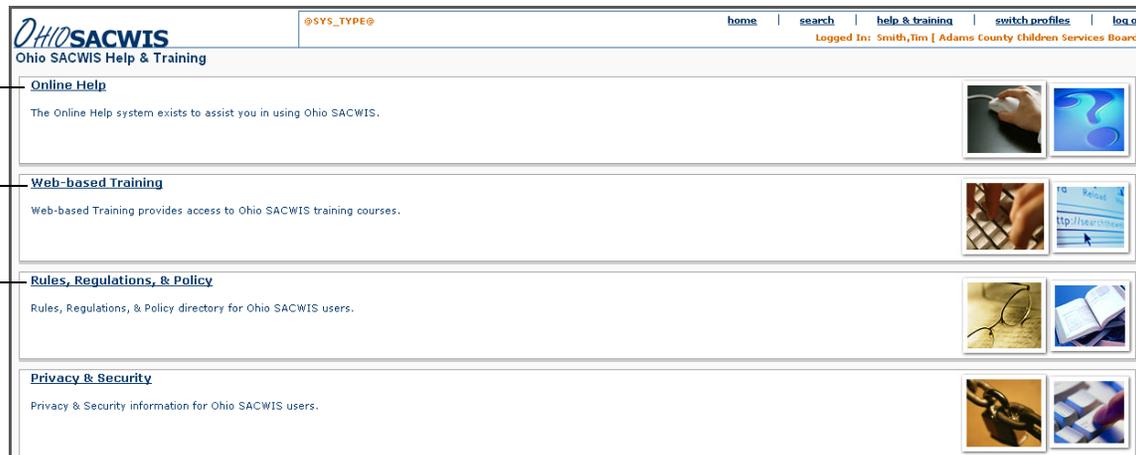
Online help is the first place you should go when you have a question about how to complete a task in Ohio SACWIS or what to enter in a particular screen. Online help provides a variety of tools, including a glossary, index, and search feature.

Finally, Web-based access to the Family, Children and Adult Services Manual (FCASM) helps you make decisions that rely on state rules and policies.

Click here to display online help, including a glossary.

Click here to display WBT.

Click here to display the Family, Children and Adult Services Manual (FCASM).



How to use WBT

Ohio SACWIS WBT is a Web-based training program that is accessible from the application. This program teaches you how to:

- Use the basic Ohio SACWIS screens and features you'll access most often
- Learn basic navigation skills
- Perform basic tasks in Ohio SACWIS

It includes tutorials, animated demonstrations, and interactive exercises and simulations. Simulations let you practice using Ohio SACWIS without actually being in the live system.

While WBT helps you learn Ohio SACWIS if you've never used it before, it can also help you if you use Ohio SACWIS

occasionally.

You launch WBT as follows:

1. From the Home screen, click the **help & training** header link at the top right of the screen. The Ohio SACWIS Help & Training screen appears.
2. Click the **Web-based Training** link. The Ohio SACWIS Online Training window appears displaying the Welcome! screen.
3. Click the first lesson, **How to navigate this training**, to begin.

You can also launch a specific WBT lesson by clicking a link in some online help windows to display additional instruction.

Click here to view the first lesson.

When finished, click the remaining items to view additional lessons.

Welcome!

Welcome to Ohio SACWIS Web-based training! This course will introduce you to the Ohio SACWIS system and some of the basic tasks you'll perform in it.

Before you start learning, this first lesson will provide some tips on to use this training effectively. The topics covered are listed below. To start, click a topic name below, or click the **Next** arrow at the bottom right corner of this page.

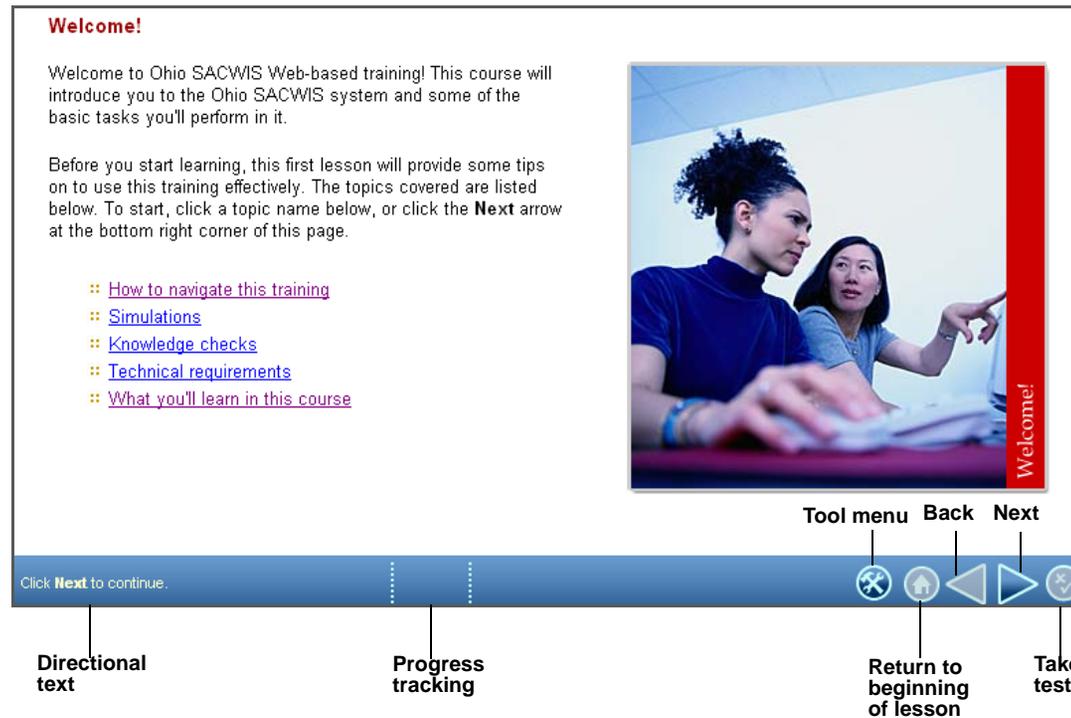
- ⌘ [How to navigate this training](#)
- ⌘ [Simulations](#)
- ⌘ [Knowledge checks](#)
- ⌘ [Technical requirements](#)
- ⌘ [What you'll learn in this course](#)

Click **Next** to continue.

How to navigate WBT

Everything you need to navigate the WBT is located in the navigation pane at the bottom of each page. Notice the following controls:

- **Directional text.** Displays instruction on what to do next.
- **Progress tracking.** Displays your position in a lesson.
- **Tool menu.** Provides access to less frequently used controls, including:
 - **Resources.** Contains links to external reference materials and Web sites.
 - **Glossary.** Contains definitions of important terms that appear in each lesson.
 - **Print.** Prints the page.
- **Bookmark/Open Bookmark.** Records the current page for later reference.
- **Return to beginning of lesson.** Returns you to the first page of the lesson.
- **Back button.** Moves one page backward.
- **Next button.** Moves one page forward.
- **Take test.** Launches review questions to check your knowledge.



How to use online help

Online help is like a user manual, but it is available online while you are working in Ohio SACWIS. With just a click, a screen description appears in a window. With another click, you can find instructions for completing a task.

Online help for screen topics is “context-sensitive.” That is, when you click the **help** header link on a screen, you get immediate, relevant assistance - when you need it.

The online help window

Online help topics appear in a browser window on top of Ohio SACWIS. The buttons along the top let you select the type of search feature you want to use:

- **Contents.** Displays topics by functional area.
- **Index.** Helps you find topics in the help files by keywords, like an index in a book.
- **Search.** Looks for topics whose content contains the word you enter.
- **Print.** Prints the page containing the selected topic.
- **Glossary.** Defines terms, abbreviations, and acronyms used in Ohio SACWIS.

The left pane shows your search feature. The right pane contains the text of the topic you selected on the left.

The screenshot shows the Ohio SACWIS online help interface. At the top, there is a navigation bar with buttons for Contents, Index, Search, Print, and Glossary. The main area is split into two panes. The left pane is a table of contents with a search box and a close button. The right pane displays the content of the selected topic, 'Review or add case members', which includes a process description and a list of steps. Annotations with arrows point to various elements: 'Click here to display topics by functional area.' points to the Contents button; 'Click here to find topics using keywords.' points to the Index button; 'Click here to look for topics that contain the words you enter.' points to the Search button; 'Click here to print the topic displayed.' points to the Print button; 'Click here to define terms, abbreviations, and acronyms.' points to the Glossary button; 'Click here to close this pane.' points to the close button in the left pane; 'This area displays the topics of your search. In this example, the table of contents is displayed.' points to the table of contents; 'When a task includes a number of subtasks, this link takes you to the primary task.' points to the 'Record a case profile' link in the process section; 'This link takes you to the previous task in this process.' points to the 'Previous Task' link; and 'This link takes you to the next task in this process.' points to the 'Next Task' link.

How to access different types of online help

There are several different types of online help available to assist you. They include:

- **Procedural help.** Provides step-by-step instructions for completing a task in Ohio SACWIS. The previous page shows an example of this type of help. It is launched from:
 - help & training header link on a screen
 - link in a screen-level topic
 - Help -> Table of Contents

- **Screen-level help.** Explains the purpose of the active screen and includes links to more details. An example appears below. It is launched from:

- help link on a screen
- Index
- Search

- **Field-level help.** Explains what to enter in a particular field. An example appears below. It is launched from:

- Link in a screen-level topic

You can access the complete online help navigation pane from:

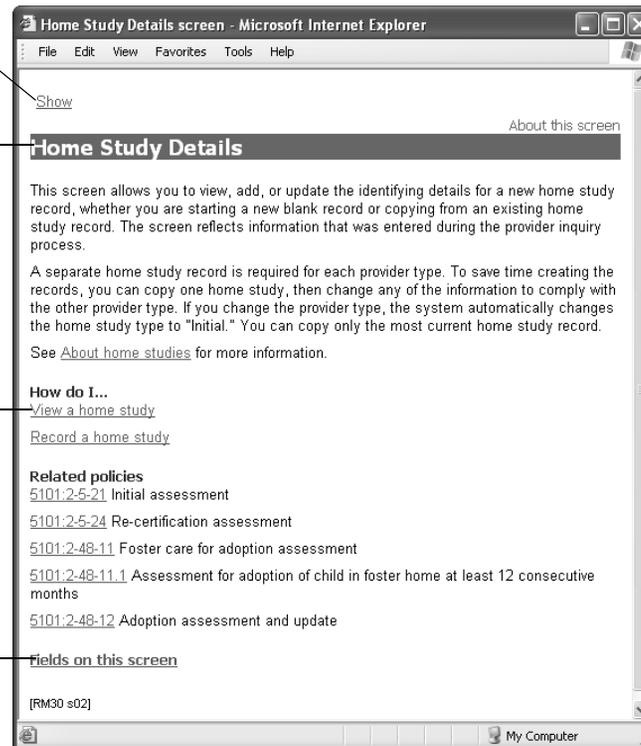
- Help & Training header or footer links
- Show link in a screen-level topic

Click here to access the rest of the online help system, including the tool bar.

This is the name of the active screen, from which you clicked the help link.

Click here to display task-level help.

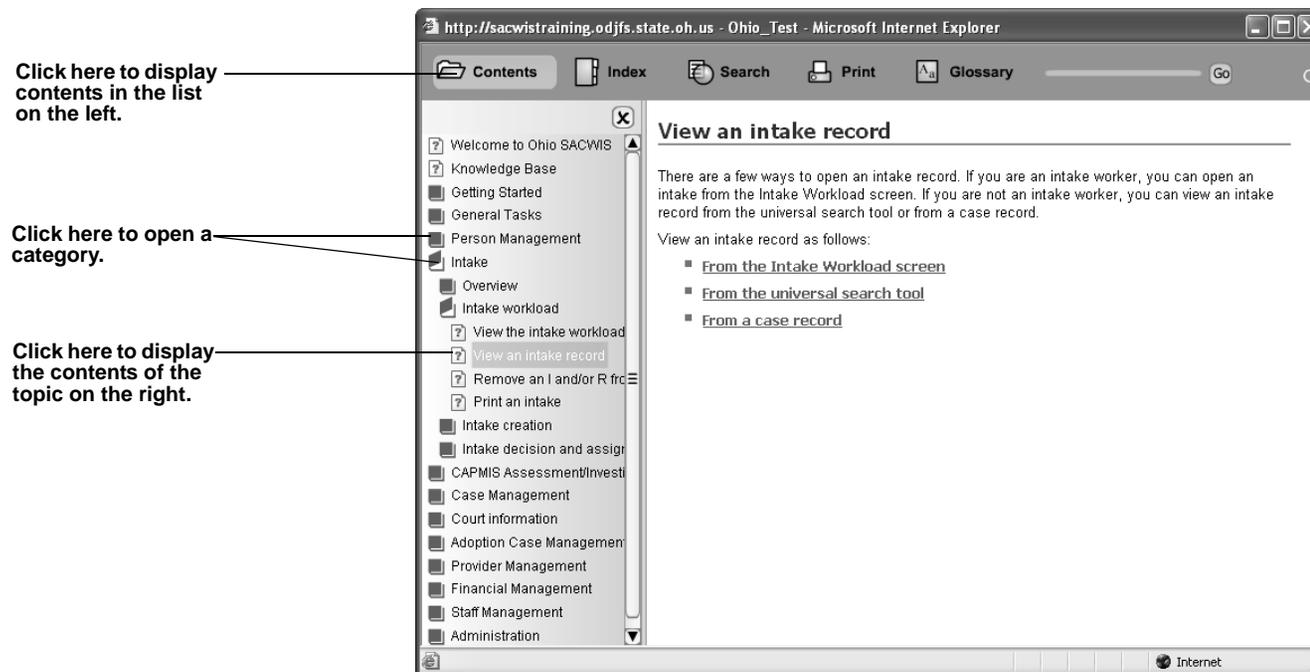
Click here to display field-level help. Instructions for completing a field appear in a table.



How to use the table of contents

The table of contents groups procedural topics by functional area.

1. Click the **Contents** button in the top left corner of the help window. The contents appear in the left pane.
2. Click on a link in the table of contents. The topic appears in the right pane.



How to use the index

The index lists keywords that relate to help topics. It looks like an index in a book.

1. Click the **Index** button in the top left corner of the help window. The index appears in the left pane.
2. Type a keyword or scroll down to the keyword you're interested in.
3. Click on a link in the index. If only one topic relates to that keyword, the topic appears in the right pane. If more than one topic relates to it, a small gray box appears, which lists topics associated with this keyword.
4. Click on the topic you want to view. The topic you selected appears on the right.

The screenshot shows a web browser window with the URL <http://sacwistraining.odjfs.state.oh.us>. The browser's address bar and navigation buttons (Contents, Index, Search, Print, Glossary) are visible. The main content area is titled "Intake categories" and contains a table with three columns: Intake Category, Intake Type, and Statutory References. The table lists various intake categories such as "Child Abuse/Neglect (C.A.N) Report" and "Dependency Report".

Annotations on the left side of the screenshot provide instructions:

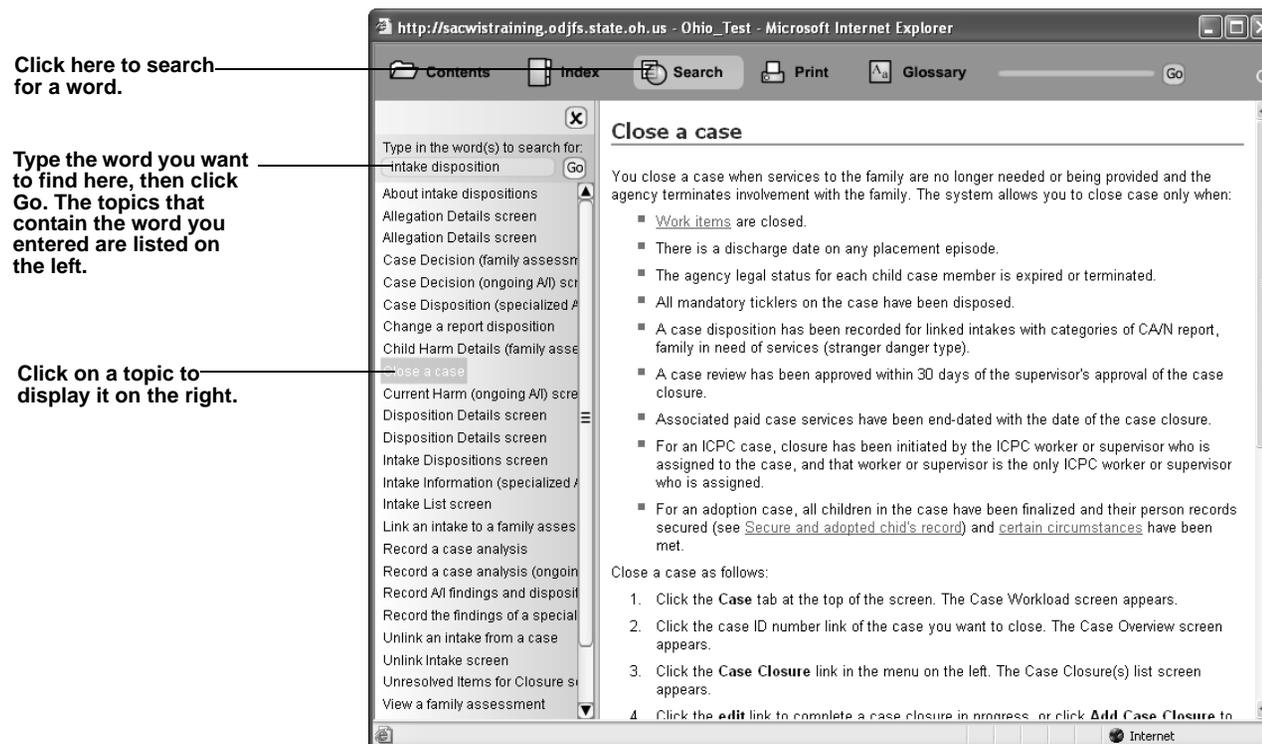
- "Click here to display the index in the list on the left." points to the "Index" button in the browser's navigation bar.
- "Enter the topic you're looking for here." points to the search input field labeled "Type in the keyword to find:".
- "Index entries appear in the list on the left." points to the list of keywords in the left pane.
- "Click on an entry to display the topic on the right." points to the "Categories" entry in the left pane.

Intake Category	Intake Type	Statutory References
Child Abuse/Neglect (C.A.N) Report	Baby Doe/Disabled Infant	ORC 2151.421 OAC 5101:2-36-07
	Emotional Maltreatment/Mental Injury	ORC 2151.03. Abused Child
	Medical Neglect	ORC 2151.03. Neglected Child
	Neglect	ORC 2151.03.1 Neglected Child
	Physical Abuse	ORC 2151.03.1 Abused Child
Sexual Abuse	ORC 2151.03.1 Abused Child Chapter 2907 Sexual Offenses	
Dependency Report	Dependent Child	ORC 2151.04 Dependent Child ORC 5153.16(A)(1)

How to use the word search

The word search feature finds topics whose content contains the word or phrase you enter.

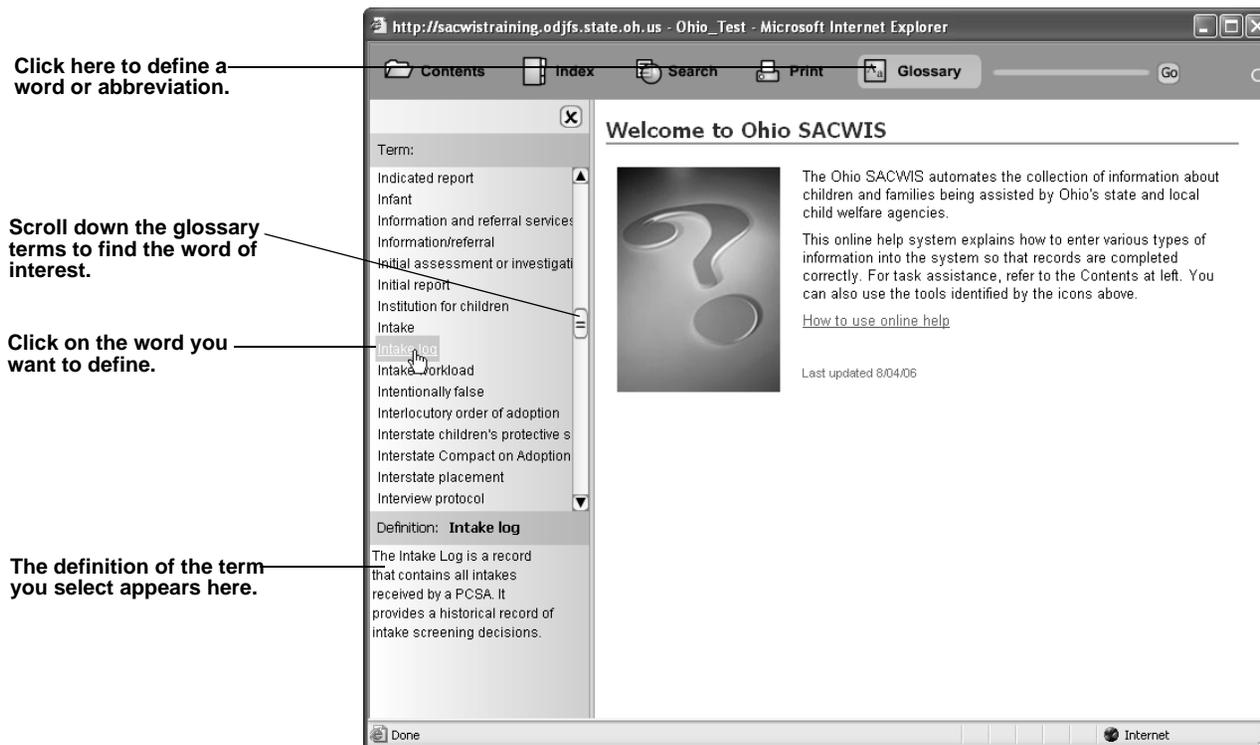
1. Click the **Search** button in the top left corner of the help window. The search feature appears in the left pane.
2. Type a word or phrase in the field at the top of the left pane, then click **Go**. The topics that contain this word or phrase appear in the list below.
3. Click on a link in this list. The topic appears in the right pane.



How to use the glossary

The glossary defines key terms and abbreviations used in Ohio SACWIS.

1. Click the **Glossary** button in the top left corner of the help window. The glossary feature appears in the left pane.
2. Click on the keyword in the **Term** box. The definition appears in the **Definition** box below. Notice that the help topic currently displayed in the right panel remains.



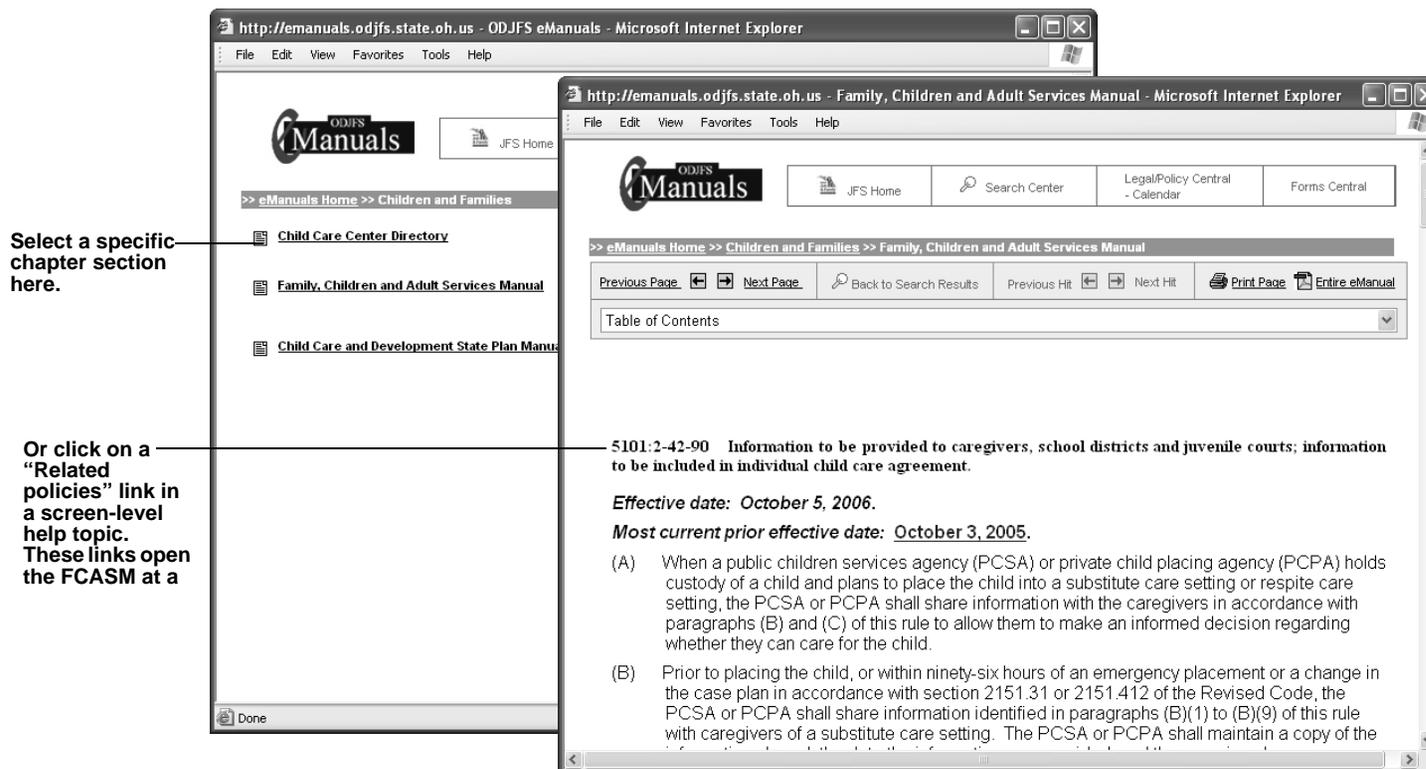
How to link to the Family, Children and Adult Services Manual (FCASM)

Ohio SACWIS includes links to the state's Web-based FCASM. There are two ways to view the FCASM. You can view the FCASM in its entirety, or you can click a link from within an Ohio SACWIS Help screen to view a specific rule that applies to the screen you are working in.

3. Click the Children & Families link. The ODJFS Children and Families e-Collection page is displayed.
4. Click the Family, Children and Adult Services Manual link. Links to chapters in this document are displayed.

Viewing the complete FCASM

1. From the Home screen, click the help and training header link. The Ohio SACWIS Help and Training screen appears.
2. Click the Rules, Regulation, & Policy link. The ODJFS Electronic Manuals page is displayed.



Chapter 2

General Tasks

Chapter contents

General Tasks, 2-2

- How to log on and off, 2-3
- How to find information, 2-4
- How to search, sort, and filter lists, 2-8
- How to view a person's SACWIS history, 2-9
- How to view your workload, 2-10
- How to view or print standard reports, 2-11
- How to switch security profiles, 2-12

General Tasks

To get started using Ohio SACWIS, there are a few simple tasks that you may want to do on a regular basis. These tasks can be done at anytime from anywhere in the system.

After first logging on to the system, you can find a variety of different types of information statewide using the universal search feature. This includes finding intakes, cases, person profiles, and workers. By using the search, sort, and filtering features when searching, you can locate specific information more easily.

Some of your daily work activities using Ohio SACWIS include viewing your workload, as well as viewing or printing a history of workers who worked on a case.

In addition, you can print selected documents and view and print a variety of standard, on-demand reports based on your role and access privileges.

This chapter explains:

- How to log on and off
- How to find information
- How to search, sort, and filter lists
- How to view a person's SACWIS history
- How to view your workload
- How to view or print standard reports
- How to switch security profiles

How to log on and off

When you launch the Ohio SACWIS application, the first screen you'll see is the Login screen. From this screen you log onto the system and obtain general information and assistance regarding Ohio SACWIS.

Logging on

1. Type your user name in the **Username** field. Your supervisor or system administrator assigned you this name.
2. Type your password in the **Password** field.
3. Click **Log In**. The Select Agency screen appears.
4. Select a value from the **Agency** drop-down list.

5. Click **Select**. The Ohio SACWIS Home screen appears. The first time you log on, you use a temporary password, which you are asked to change.

Logging off

You can close Ohio SACWIS by clicking the **log off** link in the upper right corner of the screen. This link is displayed in the header links when you are logged on to the system.

The screenshot shows the Ohio SACWIS login interface. On the left, there are four callout boxes with arrows pointing to specific elements: 'Enter your user name here.' points to the Username field; 'Enter your password here.' points to the Password field; 'Click here to log on to the system.' points to the Log In button; and 'Click these links for further assistance.' points to the SACWIS Overview, SACWIS Helpdesk, and Change Password links. The page features the Ohio SACWIS logo at the top left, a collage of family photos at the top right, and a 'What is SACWIS?' section with a mission statement on the right side. The footer includes contact information for the Ohio Department of Job & Family Services and a version number: @SYS_TYPE@ versionB.8.0.

How to find information

You can find a variety of different types of information in Ohio SACWIS using the universal search feature. You may choose to search for an intake, case, person profile, or worker from anywhere within the system.

How to find an intake

1. Click the search header link. The Ohio SACWIS Search screen appears.
2. Click the intake Search tab. The Intake Search Criteria screen appears. This screen allows you to define the criteria on which you want the system to search.
3. Enter the criteria you want to use in your search. The most efficient way to locate an intake is to enter the Intake ID. If

you do not have this number, you can enter the date or time received, or any other criteria you want to use. Click **Advanced Search Criteria** if you want to use the Reporter, Screener, or Case Last Name or Case ID as part of your search criteria.

4. In the **Sort Results By** drop-down list, select the method by which you want the system to display the search results.
5. Click **Search**. The intake records that meet your search criteria appear in the search results.
6. Click the **view** link to the left of Intake ID to view an intake.

Click here to search for an intake.

Click here to begin searching for an intake, case, person profile, or worker.

Enter the search criteria below.

Click here to use date, category, type, last name, or address as part of your search criteria.

Select the method by which you want to display the search results.

Click here to initiate the search.

The results of your search appear below.

Click here to display an intake.

	Intake ID	Intake Status	Date / Time Received	Intake Category	Case ID	Case Name	Screener Name SDHName	Agency
view report	15040	Pending	10/14/2005 06:48 PM	CA/N Report				Adams County Children Services Board
view report	15041	Pending	02/03/2006 10:27 AM	CA/N Report				Adams County Children Services Board
view report	15045	Linked	10/14/2005 07:04 PM	CA/N Report	15043	Unknown - intake 15045, Unknown - intake 15045	Smith, Tim	Adams County Children Services Board
view report	15046	Linked	10/14/2005 07:36 PM	CA/N Report	15020	Unknown - intake 15046, Unknown - intake 15046	Smith, Tim	Adams County Children Services Board

How to find a case

1. Click the search header link. The Ohio SACWIS Search screen appears.
2. Click the Case Search tab. The Case Search Criteria screen appears. This screen allows you to define the criteria on which you want the system to search.
3. Enter the criteria you want to use in your search. The most efficient way to locate a person profile is to enter the Case ID. If you do not have this number, you must enter at least part of the person's name and any other criteria you want to use.
4. In the Sort Results By drop-down list, select the method by which you want the system to display the search results.
5. Click Search. The case records that meet your search criteria appear in the search results.
6. Click the view or edit link to the left of Case ID to view a case.

Click here to search for a case.

Enter the search criteria below.

Select the method by which you want to display the search results.

Click here to initiate the search.

The results of your search appear below.

Click here to display a case.

Page 1 of 1

Case ID	Case Name	Case Address	Current Case Status	Status Effective Date	Agency	Agency Phone/Email
15196	Melton, John	1120 Morse Rd RD Columbus, OH 43229	Open	11/18/2005	Adams County Children Services Board	

How to find a person profile

1. Click the search header link. The Ohio SACWIS Search screen appears.
2. The Person Search tab is automatically selected and displays the screen. This screen allows you to define the criteria on which you want the system to search.
3. Enter the criteria you want to use in your search. The most efficient way to locate a person profile is to enter the person ID. If you do not have this number, you must enter at least part of the person's name and any other criteria you want to use. Click **Advanced Search Criteria** if you wish to use the social security number, reference numbers, or address as part of your search criteria.
4. In the **Sort Results By** drop-down list, select the method by which you want the system to display the search results.
5. Click **Search**. The person records that meet your search criteria appear in the search results.
6. Click the **view** or **edit** link to the left of Person ID to view a person's profile.

Click here to search for a person profile.

Click here to begin searching for an intake, case, person profile, or worker.

Enter the search criteria below.

Click here if you want to use the social security number, reference numbers, or address as part of your search criteria.

Click this button to initiate the search.

The results of your search appear below.

Click here to display a person profile.

OHIO SACWIS Search
Ohio SACWIS Search

Person Search | Intake Search | Case Search | Provider Search | Employee Search

Person Search Criteria

Last Name: AKA Sounds Like
 First Name:
 Middle Name:
 DOB: or From Age: To Age:
 Gender: Race: Person ID:

[Advanced Search Criteria](#)

Sort Results By:

Person Search Results
Result(s) 1 to 2 of 2

	Person ID	Name	Address	Gender	Age	DOB
edit	257	Smith, Tim				
edit	18304	Smith, Taylor		Female		

Page 1 of 1

How to find worker information

1. Click the search header link. The Ohio SACWIS Search screen appears.
2. Click the **Employee Search** tab. The Employee Search Criteria screen appears. This screen allows you to define the criteria on which you want the system to search.
3. Enter the criteria you want to use in your search. The most efficient way to locate a worker is to enter the employee ID. If you do not have this number, you must enter at least part of the person's name and any other criteria you want to use.
4. In the **Sort Results By** drop-down list, select the method by which you want the system to display the search results.
5. Click **Search**. The worker records that meet your search

6. Click the **view** or **edit** link to the left of Employee ID to view a worker's information.

Click here to begin searching for an intake, case, person profile, or worker.

Click here to search for a worker.

Enter the search criteria below.

Select the method by which you want to display the search results.

Click here to initiate the search.

The results of your search appear below.

Click here to display worker information.

Ohio SACWIS Search

Person Search | Intake Search | Case Search | Provider Search | **Employee Search**

Employee Search Criteria

Last Name: Sounds Like

First Name: [HINT: Wildcard (%) search & 'Sounds Like' cannot be used together.]

Middle Name:

Employee ID:

County:

Education Level:

Language Proficiency:

Sort Results By:

Employee Search Results

Result(s) 1 to 10 of 500 Page 1 of 50

	ID	Name	Work Number	State/County	Supervisor	Unit
select	15390	Abban01, Rhonda		Butler County CSB	Graham01-Butler, Sharon	Court/Adoption
Managed Units: Court/Adoption						
select	15326	Abban01, Rhonda				
Managed Units:						

How to search, sort, and filter lists

Several tools are available to help you locate information in Ohio SACWIS quickly and easily. When using the universal search feature, the quickest way to display a specific record is to enter its intake, case, or provider ID, or a person or employee name. If you don't have this information, you can enter a variety of other criteria to narrow your search.

1. Check the **Sounds Like** box to search for a name if you're not sure how to spell it.
2. Perform a "wildcard" search if you know the first few characters in a field. Enter those characters, followed by the percent (%) sign to search for all records beginning with those characters. For example, enter *New%* to retrieve last names such as "Newbury" and "Newman."

Note that you can use either the Sounds Like, or the wildcard search feature, but not both.

3. Click the **Advanced Search Criteria** link to use additional criteria such as name, address, ID, and so on.
4. In the **Sort Results By** drop-down list, select the method by which you want to view the search results.
5. Click **Search** to conduct your search. The list of records meeting your criteria appears in the search results below. Click **Clear Form** to clear all entries and enter new search criteria.
6. On some screens, you can select a value from a drop-down list and click **Filter**. The list of records meeting your selected criteria is displayed below.

The screenshot shows the Ohio SACWIS Search interface. At the top, there are navigation links: home, search, help & training, switch profiles, and log off. Below this is the user's login information: Logged In: Smith, Tim [Adams County Children Services Board]. The main search area has five tabs: Person Search (selected), Intake Search, Case Search, Provider Search, and Employee Search. The Person Search criteria include: Last Name, First Name, Middle Name, DOB, Gender, From Age, Race, To Age, and Person ID. There are checkboxes for AKA and Sounds Like. A hint states: "[HINT: AKA / 'Sounds Like' applies to last/first/middle name only. Wildcard (%) search & 'Sounds Like' cannot be used together.]". There is a link for Advanced Search Criteria and a Sort Results By dropdown menu set to Last Name Ascending. At the bottom are Search and Clear Form buttons. Callout boxes provide instructions: 'Click here to select the type of record you want to search for.' points to the Person Search tab; 'Click here to search on additional fields using advanced criteria.' points to the Advanced Search Criteria link; 'Click here to select the method by which you want to sort results.' points to the Sort Results By dropdown; 'Click here to initiate the search.' points to the Search button; 'Click here to clear all entries in this screen and begin again.' points to the Clear Form button; 'Check this box to search for an entry that has an "AKA."' points to the AKA checkbox; 'Check this box to search for an entry that "sounds like" if you're not sure how to spell the name.' points to the Sounds Like checkbox; 'Click here to perform a universal search on a person, intake, case, provider, or employee.' points to the search tabs; and 'Enter "%" before or after a partial name to perform a wildcard search.' points to the text input fields.

How to view a person's SACWIS history

Ohio SACWIS provides a history of a person's case, intake, provider, and Protective Service Alert (PSA) records.

1. Display the Person Profile screen.
For information about how to access the Person Profile screen, see page 4-3.
2. Click the **SACWIS History** link above the row of tabs. The SACWIS History screen appears.
3. Click the **Case History**, **Intake History**, **Provider History**, or **PSA History** link. A table listing all of this person's records appears.

4. Click the ID number link to view the details of a particular record.

Click here to display the SACWIS History screen.

Click here to display all of a person's records for a specific type of history.

Click here to view details of a particular record.

Case Id	Case Name	Case Category	Case Status	Case Status Date	Agency
15054	Moor, Randy	Ongoing		10/24/2005	Adams County Children Services Board

Intake Id	Intake Category	Intake Type	Case Disposition	Disposition Date	Agency
15215	Dependency Report	Preventative Services	N/A	2005-11-15 00:00:00.0	Adams County Children Services Board
16232	CA/N Report	Medical Neglect	N/A	N/A	Adams County Children Services Board
16239	CA/N Report	Physical Abuse	N/A	N/A	Adams County Children Services Board
16252	CA/N Report	Physical Abuse	N/A	N/A	Adams County Children Services Board
16606	CA/N Report	Physical Abuse	N/A	N/A	Adams County Children Services Board
16607	CA/N Report	Neglect	N/A	N/A	Adams County Children Services Board
16638	CA/N Report	Medical Neglect	N/A	N/A	Adams County Children Services Board
16640	CA/N Report	Physical Abuse	Substantiated	2006-02-04 00:00:00.0	Adams County Children Services Board
17082	CA/N Report	Physical Abuse	N/A	N/A	Adams County Children Services Board

How to view your workload

You can see a list of the cases and intakes assigned to you by viewing your workload.

Viewing your case workload

The Case Workload screen displays the cases to which you are assigned, if you are a caseworker. If you are a supervisor, the screen displays the cases assigned to the workers who report to you.

To view a case workload, click the **Case** tab at the top of the Home screen. The Case Workload screen appears (shown below). The screen displays cases with an “Open” status, in alphabetical order by the case name or by the worker’s last name if this is a supervisor’s case workload.

Viewing the intake workload

The Intake Workload displays new intakes until a screening decision is made. At that point, the intake is either closed if no further action is required, or assigned to a worker for further assessment.

To view an intake workload, click the **Intake** tab at the top of the Home screen. The Intake Workload screen appears. The screen displays all intake records. If you choose, you can display intakes by status. Select the status from the drop-down menu at the top of the listing, then click **Filter**.

If you are a screener, the workload includes pending and returned intakes, as well as information and/or referrals. If you are a screening decision maker, the workload includes completed intakes ready for a screening decision, intakes linked to a case, and linked intakes needing assignment.

The screenshot shows the Ohio SACWIS Case Workload interface. At the top, there are navigation tabs: Home, Intake, Case, Provider, Financial, and Administration. Below these are sub-tabs: Workload, Court Calendar, and Placement Requests. The Case Workload section includes a 'Case Worker' dropdown menu, a 'Sort By' dropdown menu set to 'Case Name Ascending', and a 'Filter' button. A list of cases is displayed, with the first case being 'Miller, Duncan'. Below the case list is a table for 'Case Member' details.

Callouts:

- Click here to view your intake workload. (Points to the Intake tab)
- Click here to view your case workload. (Points to the Case tab)
- Click here to select the workload view for a case or intake. (Points to the Workload sub-tab)
- Click here to view a caseworker’s workload. (Points to the Case Worker dropdown)
- Click here to view case details for a client. (Points to the case name 'Miller, Duncan')
- Click here to view details for a case member. (Points to the Case Member table)
- Click here to view details for this Case ID number. (Points to the Case ID '15108' in the Case Member table)

Case Member	DOB	Relationship To CPR
Moore, Shelly	05/08/1974	Biological Daughter
Moer, William	10/05/1992	Biological Son

How to view or print standard reports

Standard reports are on-demand reports that have pre-defined formats. On-demand reports are generated only when a worker requests one. Each standard report has one or more worker roles associated with it, and only workers with those roles can generate or retrieve that report.

1. From the Home screen, click the **Administration** tab at the top of the screen. The Staff tab is displayed.
2. Click the **Reports** tab. The Reports Search Criteria screen appears.
3. Enter your search criteria in the **Report Category** and **Report Type** fields.
4. Click **Search**. The screen displays the standard reports that

are available in the category and type you selected.

5. Click the **report** link for the report you want to view or print. The Report History screen appears. It displays each final report that was saved to the Ohio SACWIS database.
6. For an existing report, click the ID number link for the report you want to view or print. The report is displayed as a PDF.

Or for a new report, click **Generate Report**.

7. Complete the parameter screen if one appears, then click **Generate Report** again. The report is displayed as a PDF.
8. Click **Save** in the lower-left corner to save the report to the report history in Ohio SACWIS. *The system does not automatically save reports to the history.*

Click here to select the report category you want to view or print.

Click here to initiate the search.

The reports of the category and type you selected appear here.

Report Search Criteria

Report Category: Report Type:

Search

Report Search Results
Result(s) 1 to 10 of 21 Page 1 of 3

Title	Category	Type	
AFCARS Exception	Fiscal	Agency	report
Agency Contracts	Fiscal	Agency	report
Benefits Report	Fiscal	Agency	report
Eligibility Determination/ Redetermination Past Due Report	Fiscal	Agency	report
Foster Care Maintenance Rates	Fiscal	Agency	report
JFS 04280 - Title IV-E Foster Care Quarterly Statistical and Expenditure Report	Fiscal	Agency	report
JFS 04281 - Children Services Quarterly Statistical Report	Fiscal	Agency	report
Payment Download	Fiscal	Agency	report
Payment Invoice Detail	Fiscal	Agency	report
Provider Overpayment/Adjustment Activity	Fiscal	Agency	report

Results Page: | 1 | 2 | 3 | 39

How to switch security profiles

Your view of Ohio SACWIS is based on the security profile assigned to you. Your profile provides access to the agency with which you are associated. It is coordinated with your unit supervisor and implemented by State and County administrators.

If you are associated with more than one agency, you will have more than one security profile. But you don't have to log in and out of Ohio SACWIS to switch your view between agencies.

Switch agency profiles as follows:

1. Click the **switch profiles** header link at the top-right of the screen. The Select Agency screen appears.
2. Select a value in the **Agency** drop-down list and click **Select**. The Home screen for your selected agency appears. Notice the messages displayed in the Ticker Summary and Message Board for the selected agency.

Click here to
switch security
profiles based on
agency.



Chapter 3

Ticklers, Messages, & Notifications

Chapter contents

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How to view my ticklers, 3-3

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Ticklers, Messages, & Notifications

Ticklers, messages, and notifications are communications generated by Ohio SACWIS and its system administrators to inform you of important events.

About ticklers

When actions need to be taken on a record, the system generates a tickler to remind you to take the action described in the tickler. Ticklers appear on the **Desktop** tab of the Home screen, which the system displays when you first log in. When you click the **tickler** link on the Home screen, the system opens the case or record. The ticklers associated with the specific record are also listed on the Case Overview screen or the Provider Overview screen. In addition to system-generated ticklers, you can create an ad hoc tickler to remind you or a coworker of an action or situation that is not tracked by the system. This type of tickler may or may not be associated with a work item.

Tickler escalation

If no action is taken on a tickler, the system escalates it, that is, the system notifies your supervisor or backup. After the second escalation date, the system notifies the next level of authority. The escalation dates and the way a tickler is escalated depend on the tickler definition and the practices of your agency. Ad hoc ticklers are not escalated if you do not close them before their due dates. They must be monitored and closed manually.

Identifying tickler priority

Ticklers use two methods to alert you to their immediacy and importance. Ohio SACWIS uses a red/gold/green color scheme, along with icons representing feathers to “tickle” or

remind you of a work item. A tickler displayed in red text next to three feathers is most critical, indicating that it is past due. A tickler displayed in gold text with two feathers indicates that it is past the first escalation date but before the due date. A tickler displayed in green text with one feather indicates this is the first tickler received for a work item and is due in several days.

The system closes most ticklers automatically when the work is completed, although a tickler is closed manually if the work item cannot be completed or if it is an ad hoc tickler.

About broadcast messages

A broadcast message conveys critical information from state system administrators that needs immediate attention. Most broadcast messages are displayed in the Message Board area on the Home screen during a specified time period.

A high priority broadcast message is a special communication that is displayed at the top of your screen to inform you of a critical condition that exists, such as a child who is absent without leave (AWOL) from placement.

About notifications

A notification is an advisory notice of an action that has been completed or an upcoming event related to a non-SACWIS user, such as notifying family members of an upcoming family team conference. Notifications appear as a message in your email account.

This chapter explains:

- How to view my ticklers
- How to create an ad hoc tickler
- How to update the status of an ad hoc tickler
- How to view a broadcast message
- How to view a protective service alert

How to view my ticklers

Ticklers associated with your work items appear on the Desktop tab of the Home screen, which the system displays when you first log in. The ticklers associated with a particular case or provider record appear on the Case Overview or Provider Overview screen. You can manage all ticklers, including ad hoc ticklers, from the Home screen. The color of the tickler link indicates its urgency, based on escalation dates:

- **Red (three) feathers.** Today's date is past the due date.
- **Gold (two) feathers.** Today's date is past the first escalation date, but before the due date.
- **Green (one) feather.** Today's date is before the first escalation date.

Ad hoc ticklers are not escalated if you do not close them before their due dates. They must be monitored and closed manually.

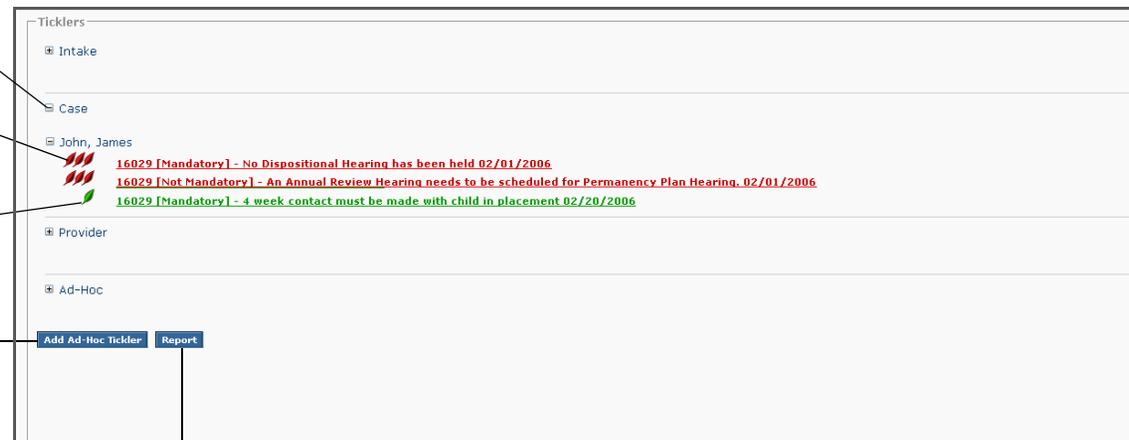
1. Click the **Home** tab or the **home** header link. The **Desktop** tab of the Home screen appears.
2. Click the **view all ticklers** link in the upper-right corner of the screen. The Ticklers screen appears. It lists the ticklers by category of work item.
3. Click on the link or the plus sign to list the ticklers within a category. A listing of all the ticklers in that category appears, including any ad hoc ticklers.
4. Click the tickler link to view the record that triggered the tickler.

Click the links below to display ticklers for each category.

Click a specific tickler to view further details. A red tickler with three feathers indicates an overdue item.

A green tickler with one feather indicates a coming due item.

Click here to create an ad hoc tickler.



Click here to view a report of your ticklers, or all ticklers for a specific worker.

How to create an ad hoc tickler

The system generates most ticklers when certain actions are required on work items. An ad hoc tickler is one you create yourself and send to another worker or to yourself. It may or may not be associated with a particular work item. When the action is completed, you or the other worker update the status manually and enter a completion date. Unlike a system-generated tickler, an ad hoc tickler is not escalated if it is not disposed before the due date.

1. Click the **Home** tab or the **home** header link. The Desktop screen appears.
2. Click the **view all ticklers** link in the upper-right corner of the screen. The Ticklers screen appears.
3. Click **Add Ad-Hoc Tickler**. The Ad-Hoc Tickler screen

appears.

4. Complete the fields on this screen. You must complete at least the **Display Date**, **Due Date**, **Status**, and **Message** fields.
5. Click **Save**. You are returned to the Ticklers screen.
6. Click **Close**. You are returned to the Desktop screen.

The screenshot shows the 'Ad-Hoc Tickler Details' form with the following fields and annotations:

- Display Date:** A date picker field with the annotation: "Enter the date when the tickler is to be displayed."
- Status:** A dropdown menu with 'Open' selected and the annotation: "Select the status of the ad-hoc tickler as open, closed, or completed."
- Category:** A dropdown menu with 'Court' selected.
- Work Item:** A dropdown menu.
- Message:** A text area for entering text, with the annotation: "Enter text for the ad-hoc tickler here."
- Due Date:** A date picker field with the annotation: "Enter the date the work item is due here."
- Completion Date:** A date picker field.
- Buttons: **Save** and **Cancel** are located at the bottom left.

How to update the status of an ad hoc tickler

Unlike system-generated ticklers, the system does not monitor the progress of an ad hoc tickler or escalate the tickler if it is not disposed before the due date. You must record the progress or completion of an ad hoc tickler.

1. Click the **Home** tab or the **home** header link.
2. Click the **view all ticklers** link at the upper-right corner of the screen. The Ticklers screen appears.
3. Click the **Ad-Hoc** link. A listing of all your ad hoc ticklers appears.
4. Click the **edit** link next to the tickler you want to close or update. The Ad-Hoc Tickler screen appears.

5. Enter a new status in the **Status** field and a date in the **Completion Date** field if the action was completed.
6. Click **Save**. You are returned to the Ticklers screen.
7. Click **Close**. You are returned to the Desktop screen.

Select the status of the ad hoc tickler as open, closed, or completed.

Ad-Hoc Tickler Details

Display Date: * [] []

Status: * [Open] [v]

Category: [Court] [v]

Work Item: [] [v]

Message: * [] [v]

Due Date: * [] []

Completion Date: [02/12/2006] [] []

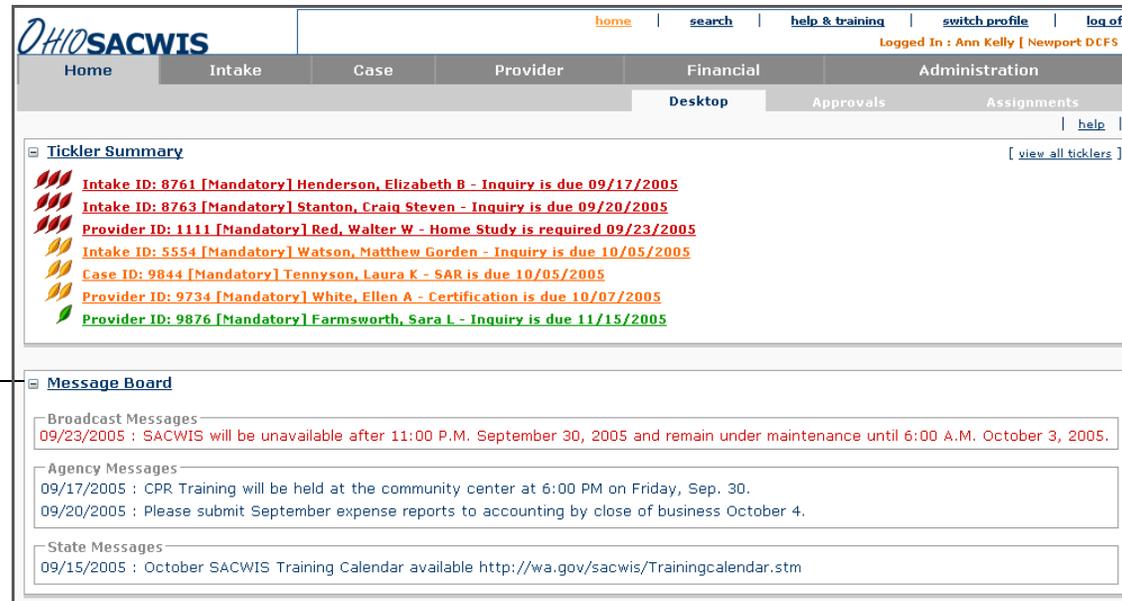
[Save] [Cancel]

Enter a completion date if the tickler is closed.

How to view a broadcast message

A broadcast message conveys critical information that needs immediate attention. Messages, which are created by state or County system administrators, appear in the Message Board area on the Home screen during a specified time period.

1. Click the Home tab or the home header link.
2. Scroll to the bottom of the page.
3. Click the Message Board link if it is not already open. The screen displays the following:
 - Broadcast messages
 - Agency messages
 - State messages



How to view a protective service alert

A protective service alert (PSA) is issued when an agency is unable to locate a family or child who is the subject of a CA/N assessment or investigation or child who requires protective services. The state's PSA administrator is responsible for entering and maintaining all PSAs. However, any worker can view a PSA.

1. From the Home screen, click the **Administration** tab. The On-Call Employee Search Criteria screen appears.
2. Click the **Utilities** tab. The Merge Person screen appears.
3. Click the **Maintain PSA** link in the menu on the left. The PSA screen appears.
4. Click the **view** or **edit** link next to a PSA record. The Participants screen appears.
5. Click the **Details** tab. The PSA Information screen appears.
6. Click the **Actions** tab. The Actions Taken by Agency screen appears.
7. Click the **Out-of-State** tab. The Outgoing Information screen appears. Click **Incoming** and **Outgoing** links for further details.
8. Click the **Outcome** tab. The Outcomes screen appears.
9. Click the **Extension** tab. The Expiration Extension screen appears.
10. Click **Cancel** to return to the PSA screen.

Click here to display the PSA screen.

Click the Participants, Details, Actions, Out-of-State, Outcome, and Extension tabs to view details of a PSA.

Click here to display the On-Call Employee Search screen.

Click here to display the Merge Person screen.

Ohio SACWIS | @SYS_TYPE@ | home | search | help & training | switch profiles | log off
 Logged In: Smith, Tim [Adams County Children Services Board]

Home | Intake | Case | Provider | Financial | Administration | Utilities | help

Administration > Utilities > Maintain PSA

Merge Person
 Associate Case
Maintain PSA
 Restrict Case/Intake
 Alleged Perpetrator

Participants | Details | Actions | Out-of-State | Outcome | Extension

PSA ID: 15243 | PSA Reference Name: Moor, Randy
 PSA Status: PENDING | PSA Originating Agency: Adams County Children Services Board

Caretaker(s) Information

Person ID	Name	DOB	Age	Gender	Expectant Mother
16831	Moor, Randy	06/10/1982	24	MALE	delete

Add Caretaker

Child(ren) Information

Person ID	Name	Child Status	DOB	Age	Gender	Expectant Mother
16832	Moor, Nancy	At Risk	06/29/1995	11	Female	delete

Add Child | Determine Child Status

PSA Reference Name: Moore, Randy

Chapter 4

Person Management

Chapter contents

Person Management, 4-2

How to search for and view a person profile, 4-3

How to record a basic person profile, 4-4

How to record an education profile, 4-5

How to record a medical profile, 4-6

How to record a financial profile, 4-7

Person Management

A “person profile” is used to manage information about people in the system – whether they are participants, workers, or providers.

A person profile identifies a person to Ohio SACWIS by capturing basic demographic and other information. You can record multiple names, addresses, and phone numbers for each person involved in a case or associated with a case. You can also record additional information such as background information, reference numbers, adoption history, paternity, education, and medical information.

If a person is involved with Ohio SACWIS at multiple times for different reasons, the system is able to track the person’s roles without duplicating person information. To maintain accurate person information, the system requires you to conduct a search before you establish a new record.

Only workers assigned to the case or provider with which the person is associated are able to update profile information.

Person roles

A person can perform many roles within the system. Ohio SACWIS defines the following person roles:

- Intake or case participant: client, child, family member, and so on
- Employee: agency staff, including caseworker, support staff, and so on
- Provider: foster parent, adoptive parent, household member, caregiver, and so on
- Other involved person: attorney, guardian ad litem, Court-Appointed Special Advocate (CASA), and so on

Person profiles

Ohio SACWIS defines the following types of person profiles:

- **Basic person profile.** This includes an individual’s name, address, identifying information, demographics, marital information, reference ID’s, paternity information, criminal history, personal characteristics, and hazardous behavior.
- **Education profile.** This includes a history of school districts and schools a child attended, as well as a child’s academic performance and school attendance by grade level. It may also contain special education needs, including the existence of Multi-Factored Evaluations (MFE) and Individualized Education Plans (IEP). Additionally, you may view and record graduation and school activity information.
- **Medical profile.** This includes information about a child’s health care providers, medications, immunizations, medical history, treatments, health insurance, and birth or pregnancy information.
- **Financial profile.** This includes income, expense, resource, and employment and health insurance information for a person who is a member of a case.
- **Other profile information.** You can also view and record SACWIS work history, legal and delinquency information, and military history.

This chapter explains:

- How to search for and view a person profile
- How to record a basic person profile
- How to record an education profile
- How to record a medical profile
- How to record a financial profile

How to search for and view a person profile

The system requires you to search the Ohio SACWIS database before you record a new person, to make sure that a record does not already exist. When you initiate a search for a person profile, the system searches the entire Ohio SACWIS database, statewide, for the person name and other demographic information you use as your search criteria.

1. Click the universal search link at the top of the screen. The Person Search screen appears. This screen allows you to define the criteria on which you want the system to search.
2. Enter the criteria you want to use in your search. The most efficient way to locate a person profile is to enter the person ID. If you do not have this number, you must enter at least

part of the person's name and any other criteria you want to use. Click **Advanced Search Criteria** if you want to use the social security number, reference numbers, or address as part of your search criteria.

3. In the **Sort Results By** field, select the method by which you want the system to display the search results.
4. Click **Search**. The person records that meet your search criteria appear in the search results.
5. Click the **edit** link to the left of the person's name. If you cannot find the person, click **Add Person** to create a new person profile. The Basic Person Information screen is displayed. Click the **Education, Medical, Employment, Military, Legal, Delinquency, and SACWIS History** links to view further information.

Enter the search criteria here. You must enter at least part of the person's name and any other criteria you want to use to narrow your search.

Click here if you wish to use social security number, reference numbers, or address as part of your search criteria.

Select the method by which you want to display the search results.

Click here to initiate the search.

The results of your search appear here. Click a link to display a person profile.

Click here to search for a person profile.

Ohio SACWIS Search

Person Search | Intake Search | Case Search | Provider Search | Employee Search

Person Search Criteria

Last Name: Jones
First Name: S%
Middle Name:
DOB: [] or From Age: [] To Age: []
Gender: [] Race: [] Person ID: []

[Advanced Search Criteria](#)

Sort Results By: Last Name Ascending

[Search](#) [Clear Form](#)

Person Search Results
Result(s) 1 to 2 of 2

	Person ID	Name	Address	Gender	Age	DOB
edit	32140	Jones, Sammie		Unknown	10	10/25/1995
edit	32063	Jones, Sam		Male	6	01/01/2000

How to record a basic person profile

When you create a new person profile, the system displays a screen with a number of tabs. The first is the Basic tab, on which you enter the person's name, AKA names, ID numbers, birth information, and so on.

1. In the **Basic** tab of the Person Profile screen, enter the person's first name in the **First Name** field and last name in the **Last Name** field. You must enter at least these two fields to create a new person profile in the system. Do not enter a nickname, maiden name, or other AKA name in these fields.

For information about how to access the Person Profile screen, see page 4-3.

2. Complete as much information as you can in the remaining fields, including the person's social security number, birth date, and driver's license number.
3. If the person has an AKA name (nickname, maiden name, and so on), click **Add AKA**, record the AKA name, and click **Save**. SACWIS returns you to the **Basic** tab.
4. Record information in the **Demographics, Address, Additional, Background, Characteristics, and Safety Hazard** tabs. Within each tab, complete the required fields and click **Save**.
5. In addition, click the links at the top of the screen to record additional information, including **Education, Medical, Employment, Military, Legal, and Delinquency**, if these apply to the person.

The screenshot shows the 'Basic' tab of the Person Profile screen. The top navigation bar includes tabs for Profile, Education, Medical, Employment, Military, Legal, Delinquency, and SACWIS History. The main content area is divided into sections: Person Information, AKA Names, and Safety Hazard. Callouts provide instructions for various fields and buttons:

- Click here to display the Basic tab of the person profile.** (Points to the 'Basic' tab in the navigation bar)
- Enter the person's name and identifying information.** (Points to the First Name and Last Name fields)
- Select a check box item if it applies. You may select more than one.** (Points to the Safety Hazard Exists checkbox)
- Click edit to change the AKA name. Click delete to remove it.** (Points to the edit and delete buttons in the AKA Names table)
- Click here to add a new AKA name.** (Points to the Add AKA button)
- Enter the person's demographic and marital information.** (Points to the Demographics tab)
- Enter the person's address.** (Points to the Address tab)
- Enter reference IDs, paternity information, and other details.** (Points to the Add'l tab)
- If the person has a criminal record, enter it here.** (Points to the Background tab)
- Enter other personal characteristics.** (Points to the Characteristics tab)
- If the person presents a safety hazard, identify the traits.** (Points to the Safety Hazard tab)

Person Information

Name: Moor, Randy Person ID: 15629 SSN: 123-45-6789 DOB: 04/05/1975

Prefix: [Dropdown]

First Name: * Randy Middle Name: [Field]

Last Name: * Moor Suffix: [Dropdown] **Populate AKA Name**

Gender: Male SSN: 123-45-6789

DOB: 04/05/1975 Age: 30

Birth City: Columbus Birth State: Ohio Birth Country: Franklin

Driver's License #: O123456789 Issue State: Ohio Expiration: 12/29/2009

Safety Hazard Exists Safety Plan Exists Environmental Hazard Exists AWOL

Prefix	First Name	Middle Name	Last Name	Suffix	
edit	Randy		Moore		delete
edit	Mandeline		Moore		delete

Add AKA

How to record an education profile

An education profile details the schools a child has attended, his or her performance in school, and any special education needs.

Education information is captured for all children placed in a substitute care setting and in the legal custody of the PCSA. As an option, it may also be recorded for non-custody children. Portions of the educational information are used to generate the ODJFS 1443 Education and Health Information Report. This information is designated by a symbol located next to the field.

1. From the Person Profile screen, click the **Education** link at the top of the screen. SACWIS displays the **School Profile** tab of the Education Profile screen.

For information about how to access the Person Profile screen, see “How to search for and view a person profile.”

2. To record a school attended, click **Add School** or click the **edit** link next to an existing school record. The **School Details** screen appears.
3. Complete as much information as you can in the remaining fields. You must complete at least the following fields to save the record: **School District**, **School Name**, **Category**, **Type**, **Start Date**, **Beginning Grade**.
4. Record information in the **Performance** and **Special Education** tabs. Within each tab, complete the required fields and click **Save**.

Click here to display the **School Profile** tab of the education profile.

Enter information about a child's academic performance, suspension, or truancy from school.

Enter information about a child's special education, including MFE and IEP details.

Click edit to change school history details. Click delete to remove a school history record.

Click here to add a new school.

The screenshot shows the Education Profile screen for a child named Slate (CM)08, Rockette. The screen has tabs for School Profile, Performance, and Special Education. The School Profile tab is active, showing fields for Name, Person ID, SSN, and DOB. Below these are sections for Financially Responsible School District and School History. The School History section contains a table with one record for John Muir Elementary School. An 'Add School' button is at the bottom.

Financially Responsible School District						
Name	Start Date	End Date				

School History						
	School Name	Type	District Name	Beginning Grade	Start Date	End Date
edit	John Muir Elementary School	PRIMARY	CENTRAL LOCAL	First	09/12/2006	delete

[Add School](#)

How to record a medical profile

A medical profile includes information about a child’s health care. The profile captures information on providers, treatment, medications, immunizations, health insurance, and birth or pregnancy.

1. From the Person Profile screen, click the **Medical** link at the top of the screen. Ohio SACWIS displays the **Provider** tab of the Medical Profile screen.

For information about how to access the Person Profile screen, see “How to search for and view a person profile.”

2. To record a provider, click **Add Provider** or click the **edit** link next to an existing provider’s name. Enter the new or updated information into the Health Care Provider

Information screen and click **Save**.

3. Record information in other tabs, including **Treatment, Medication, Immunization, Health Insurance, Birth, and Pregnancy** tabs. Within each tab, complete the required fields and click **Save**.

Click here to display the Provider tab of the medical profile.

Enter childhood illness and treatment history.

Enter medication information.

Enter immunization history, including dates and types.

Enter details of health insurance providers.

Enter birth location and details of delivery and birth.

Enter details of pregnancy.

Click edit to change provider history details. Click delete to remove provider history details.

Click here to add a new provider.

Profile	Education	Medical	Employment	Military	Legal	Delinquency	SACWIS History
Provider		Treatment	Medication	Immunization	Health Insurance	Birth	Pregnancy
Name:	Moor, Randy	Person ID:	15629	SSN:	123-45-6789	DOB:	04/05/1975
Health Care Provider History							
edit	12/08/2004	First Visit	Provider End Date	Provider Type	Provider Name		
				Child Care Provider - Type B	Thomas Edison Child Care Center		
<input type="button" value="Add Provider"/>							
<input type="button" value="Apply"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>							

How to record a financial profile

A financial profile includes the income, expense, resource, and employment information of a person who is a member of a case. Ohio SACWIS uses this information to determine IV-E eligibility.

1. From the Person Profile screen, click the **Employment** link at the top of the screen. SACWIS displays the **Employment** tab of the Financial Profile screen.

For information about how to access the Person Profile screen, see "How to search for and view a person profile."

2. To record an employer or other employment information, click **Add Employment** or click the **edit** link next to an existing record. Enter the new or updated information into

the Employment Record screen and click **Save**.

3. To record a health insurance provider, click **Add Insurance Provider** or click the **edit** link next to an existing provider's name. Enter the new or updated information into the Primary Insurance Provider Details screen and click **Save**.
4. Record information in the **Income**, **Expenses** and **Resources** tabs. Within each tab, complete required fields and click **Save**.

Enter employment history and primary health insurance providers here.

Enter income history and details here.

Enter expense history and details here.

Enter resources and asset information here.

Click edit to change employment details.

Click this button to add a new employer.

Click edit to change provider history details.

Click here to add a new insurance provider.

Begin Date	End Date	Employer
11/01/2005		Circuit City
10/06/2004		ValuCity

Insurance Provider	Begin Date	End Date	Employer
Blue Cross	11/01/2004		ValuCity

Chapter 5

Intake

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Intake

Intake is the process by which an agency receives and records information about children and families. It is the point of entry for persons in the Ohio SACWIS system. An intake reflects the initial referral made on behalf of a child or family, whether the referral concerns child abuse/neglect, family in need of services, or dependency.

Intakes may be in the form of telephone calls, faxes, letters, face-to-face visits, email, or any other electronic method to a PCSA. In Ohio SACWIS, the Intake area lets you enter information about the reporter (referent), the child(ren) involved, other participants, third-party involvement, out-of-home details, and so on. It is also the area where the screening decision is recorded.

Intakes fall into one of four main categories:

- Child abuse/neglect (CA/N)
- Information and/or Referral (I and/or R)
- Dependency
- Family in need of services (FINS)

About screening

The screening function is the first point at which a judgment must be made about a child's safety. The screener gathers sufficient information about the referred family to assess the credibility of the allegation, to locate the family and child(ren), and to identify children who may be in danger. When the screener has collected the information, he or she indicates that the intake record is "complete."

At that point, the intake record is sent to a screening decision maker (SDM). When an intake is screened in, the SDM links it to a new or existing case record. If a new case is created from the intake, the SDM also assigns it to the appropriate assessment, investigation, or ongoing caseworker.

About intake status

An intake is assigned a status, according to the actions taken on the intake. This status appears on the Intake Workload screen, as well as in the header of the intake screens.

When a new intake is saved, it's in "Pending" status.

When the screener has selected the **Intake Completed by Screener** check box on the Basic Information intake screen, the intake is "Complete." This does not mean final approval is complete. This simply indicates the screener is finished entering the reported information.

When the screening decision maker has reviewed the intake and recorded a decision, the status is either "Screened In" or "Screened Out."

If the screening decision maker chooses to return the intake to the worker who created it for further work, it's in "Returned" status.

This chapter explains:

- How to record an intake
- How to record a screening decision
- How to link an intake to a case record
- How to create a new case
- How to delete an intake

How to record an intake

When you, as the screener, receive an intake, you collect as much information as possible so that the safety of the child(ren) can be determined. You must record enough information for a screening decision maker to determine whether the agency should become involved. The information you collect may also be used for management reporting purposes.

1. From the Home screen, click **Intake**. The Intake Workload screen appears.
2. Scroll to the end of the workload, then click **Add Intake**. The Basic Information screen appears.
3. Record basic intake information. The system automatically fills in some fields. Complete the required fields and click **Apply**. Note that the value you select in **Intake Category**

(CA/N, Dependency, FINS, I and/or R) further defines those values available in **Intake Type**.

4. Record information in other tabs, including **Reporter**, **Participants**, **Additional** intake details, intake **Allegations**, and **Out-of-home care (OHC)** information, as applicable. Within each tab, complete the required fields and click **Apply**.
5. When you have finished entering all information for this intake, click the **Basic** tab.
6. Select the **Intake Completed by Screener** check box, at the bottom of the screen.
7. Click **Save**. The intake status of this record is now "Complete." At this point, only the screening decision maker may edit the intake record and record a screening decision.

The screenshot shows the 'Basic' tab of the Intake form. It includes fields for 'Received' (date and time), 'Intake Category', 'Intake Method', and 'Intake Types'. There are also buttons for 'Add >', 'Add All >>', '< Remove', and '<< Remove All'. A text area for 'Intake Narrative' has 'Spell Check' and 'Clear' buttons. At the bottom, there is a 'Living Arrangement at Time of Intake' dropdown and an 'Intake Completed by Screener' checkbox. Callouts point to these elements with descriptive text.

Enter details about the person who contacted the agency. (points to Reporter tab)

Enter information describing participants and their roles. (points to Participants tab)

Enter third-party or law enforcement involvement. (points to Additional tab)

Enter allegations for law enforcement as part of a CA/N. (points to Allegations tab)

Enter out-of-home care information. (points to OHC tab)

Click here to specify this intake as a CA/N, Dependency, FINS, or I and/or R. (points to Intake Category dropdown)

Click an Intake Category to display the Intake Types available. Select the type of intake, then click Add>>. You can select more than one intake type. (points to Intake Types list)

Enter narrative text here describing what the reporter is telling you. (points to Intake Narrative text area)

Click here to indicate when the intake is complete. (points to Intake Completed by Screener checkbox)

How to record a screening decision

When the screener completes an intake, it appears in the intake workload of the screening decision maker. As the screening decision maker, you have three options to choose from when making the screening decision: screened in, screened out, and I and/or R.

1. From the Home screen, click **Intake**. The Intake Workload screen appears.
2. Identify the intake record from the listing. The status will be "Complete."
3. Click the **decision** link for that record. The Decision Details screen of the intake record appears.
4. Click **Yes** or **No** next to **Is This an Emergency?**

5. Select a screening decision, then complete the remaining fields on the screen. If you are screening out an intake, be sure to complete the **Reason** and **Comments** fields.
6. If the intake requires the screener to do additional work, click **Return to Screener**.
7. In the **Comments** field, enter the reason for returning the intake.
8. Click **Save**. The Basic Information screen appears.
9. If you are returning the intake, the intake appears in the screener's Intake Workload with a **remarks** link.

This tab is automatically selected for you to display the Decision screen for the intake record.

Select Yes or No here. If you select Yes, the system sets the response time for initiation to 1 hour. If you select No, it sets the response time to 24 hours.

Enter screening decision here.

If you are screening out an intake or returning the intake to a screener, be sure to enter a reason here.

Click here if an intake requires additional work.

Basic	Reporter	Participants
Screener Name: 15305		Date & Time Created: 01/23/06 06:12 PM
Intake ID: 17143		Intake Status: Complete
Intake Category: Information and/or Referral		
Decision Details		
Is this an Emergency?	<input type="text"/>	
Screening Decision:	<input type="text"/>	
Response Time for Initiation:	<input type="text"/>	County Priority:
Reason:	<input type="text"/>	
Date & Time of Screening Decision:	02/12/2006 12:56 PM	
Comments:	<input type="text"/>	
Supervisor Name: Smith, Tim	02/12/2006 12:56 PM	
Return to Screener		

How to link an intake to a case record

After recording the screening decision, you, as the screening decision maker, link the intake to a case record. You can link it to an existing case or create a new case record to which the intake is linked. When you create a new case, you also assign it to a worker.

If a screened-in intake is linked to a closed case, the case is reopened. Otherwise, there is no change to the status of a case to which an intake is linked.

1. From the Home screen, click **Intake**. The Intake Workload screen appears.
2. Identify the intake record from the listing.
3. Click **link** to the left of the Intake ID column. The Link Case

screen appears. This link appears for intakes for which the status is "Screened In" or "Screened Out." It will also appear for I and/or R intakes when at least one participant was recorded.

4. Click the plus sign to the left of the Case ID column and review the list of associated cases for intake participants.
5. Click **link** next to the ID of the case to which you want to link this intake. A message confirms that the intake has been linked to the selected case.

The screenshot shows a 'Link Case' dialog box with a table of cases and a list of participants. Callouts point to specific elements:

- Click here to select the case to which you want to link this intake.** Points to the 'link' button in the first row of the case table.
- Click here to display the Link Case screen.** Points to the 'link' button in the second row of the case table.
- Click here to view details of the case to which you want to link this intake.** Points to the 'link' button in the third row of the case table.

link	Case ID	Case Name	Case Status	Status Date	Agency
link	16324	Doe, John	OPEN	01/31/2006	Adams County Children Services Board
	19880	Doe, John*		08/22/1980	
	19881	Doe, Nancy		06/07/1999	
	19880	Doe, John*		08/22/1980	
	19881	Doe, Nancy		06/07/1999	
link	16324	Doe, John	OPEN	01/31/2006	Allen County Children Services Board

Buttons: Create Case, Cancel

How to create a new case

If you are linking an intake to a new case, you must first create a new case record.

1. From the Home screen, click **Intake**. The Intake Workload screen appears.
2. Identify the intake record from the listing.
3. Click the link link to the left of the Intake ID column to display the Link Case screen.
4. Click **Create Case**. The Create Case screen appears. This screen lists participants in the intake. As a default, each person is selected as a participant in the new case.
5. For each participant in the intake who will not be a participant in the case, clear the check box in the Select

column.

6. Select the case reference person (CRP) in the **Case Reference Person** field. A case may have only one CRP.
7. Click **Save**. The system creates a new case ID and links the intake to that case. The Work Assignments screen appears.
8. Select the worker to whom you want to assign the new case.

Click a check box item to clear it if the person is not a participant in the intake.

Select only one CRP here.

Click **Save** to save this information to the database and create a new case ID.

Select	Person ID	Person Name	DOB	Role
<input checked="" type="checkbox"/>	19880	Doe, John	08/22/1980	Alleged Perpetrator (AP)
<input checked="" type="checkbox"/>	19881	Doe, Nancy	06/07/1999	Alleged Child Victim (ACV)

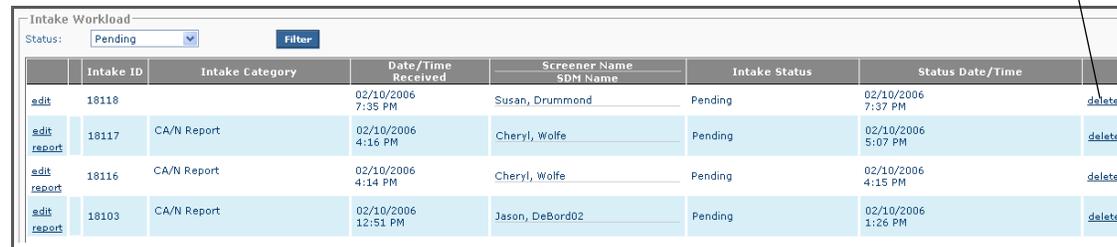
Case Reference Person: *

How to delete an intake

You can delete an intake record that was created in error, as long as the status is "Pending."

1. From the Home screen, click **Intake**. The Intake Workload screen appears.
2. Locate the intake to be deleted.
3. Click the **edit** link to view the details of the intake and verify that this is the record you want to delete.
4. Click **Cancel** to return to the Intake Workload screen.
5. Click the **delete** link in the far-right column. The system displays a dialog box asking you to confirm the action.
6. Click **OK**. The intake is removed.

Click here to delete this intake.



The screenshot shows the 'Intake Workload' interface. At the top, there is a 'Status' dropdown menu set to 'Pending' and a 'Filter' button. Below this is a table with the following columns: Intake ID, Intake Category, Date/Time Received, Screener Name (SDN Name), Intake Status, and Status Date/Time. Each row also has an 'edit report' link on the left and a 'delete' link on the right. An arrow points from the text 'Click here to delete this intake.' to the 'delete' link in the first row of the table.

	Intake ID	Intake Category	Date/Time Received	Screener Name SDN Name	Intake Status	Status Date/Time	
edit report	18118		02/10/2006 7:35 PM	Susan, Drummond	Pending	02/10/2006 7:37 PM	delete
edit report	18117	CA/N Report	02/10/2006 4:16 PM	Cheryl, Wolfe	Pending	02/10/2006 5:07 PM	delete
edit report	18116	CA/N Report	02/10/2006 4:14 PM	Cheryl, Wolfe	Pending	02/10/2006 4:15 PM	delete
edit report	18103	CA/N Report	02/10/2006 12:51 PM	Jason, DeBord02	Pending	02/10/2006 1:26 PM	delete

Chapter 6

Assessment

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Assessment

When an intake is screened in and assigned, all assessment activities are documented in Ohio SACWIS. The specific tools you use in the system depend upon the type of intake or case.

Types of tools

Ohio SACWIS includes several tools for assessing or investigating a situation. The type of tool you use depends on the specific details of the case. They include:

- **Safety assessment.** This tool is completed in response to a child abuse and/or neglect (CA/N) report, a dependency report, a family in need of services report (optionally), or any other instances throughout the life of a case when safety needs should be assessed.
- **Safety plan.** This tool is required when the protective capacities of the family cannot control currently active safety threats, and safety interventions must be implemented. A safety plan can be implemented at any time during the life of a case. The safety plan identifies specific activities to be conducted to secure the safety of the child(ren), identify the person(s) responsible for each activity, outline how the activities will control the identified safety threats, and explain how the plan will be monitored. A safety plan is a voluntary agreement between the participants and the agency. However, if the safety plan is not followed, legal action may follow.
- **Family assessment.** This tool is used to assess risk and identify the strengths and needs present in the family in order to determine what level of service the family needs. Details of a family assessment include the review of safety issues, child harm, strengths and needs assessment, family perception, risk assessment, and service planning. The family assessment is completed for all intakes within the CA/N category and is optional for other intake categories.

A family assessment is completed within 30 days of the receipt of the intake report and before the case plan on all cases transferred for ongoing case services.

- **Specialized assessment/investigation (A/I).** This tool allows you to capture the investigative requirements when the alleged perpetrator has access to the alleged child victim through his or her affiliation or employment with an institution and is responsible for the care, physical custody, or control of the child.
- **Ongoing case assessment/investigation (A/I).** This tool helps you assess or re-assess risk, describe child harm, and document investigative activities when the agency receives a report of child abuse and/or neglect.
- **Safety reassessment.** This tool is used when a child is in immediate danger of serious harm, and safety planning must be implemented. It may be completed at any time such an assessment is needed. As an alternative, you may use the safety assessment tool.

This chapter explains:

- How to view a safety assessment
- How to record a safety assessment
- How to record safety factors in a safety assessment
- How to record safety considerations in a safety assessment
- How to record a response to a safety assessment
- How to view a family assessment
- How to record a family assessment
- How to link an intake to a family assessment
- How to record a risk assessment
- How to record a case analysis
- How to record a specialized assessment/investigation
- How to record case services
- How to record justification/waiver

How to view a safety assessment

The safety assessment documents the evaluation of safety factors or signs of present danger, past history, a child's vulnerability, and a family's protective capacities. It helps the agency determine the appropriate safety response.

1. From the Home screen, click the **Case** tab.
2. Click the **Workload** tab. The Case Workload screen appears.
3. Click on your name or that of another worker.
4. Click the case number link. The Case Overview screen appears. This screen displays a summary of case information.
5. Click the **Safety Assessment** link in the menu on the left. The Safety Assessment list screen appears.
6. Click the **edit** or **view** link for the assessment record you want to view. The Safety Assessment Details screen appears. It lists intake records that are linked to the safety assessment and participants in the safety assessment.
7. Click the **Safety Factors** tab. This screen lists a series of questions related to the safety of the children in the family and the worker's responses.
8. Click the **Safety Considerations** tab. This screen displays links to historical information, child vulnerability, and protective capacities.
9. Click the **Safety Response** tab. This screen displays a summary of the safety assessment and safety responses.
10. Click **Cancel** to return to the Safety Assessment list screen.

Click here to search for a safety assessment. → [Safety Assessment](#)

Click here to view or print a safety assessment. → [edit report](#)

Click here to edit a safety assessment. → [edit report](#)

Click here to add a new safety assessment. → [Add Safety Assessment](#)

Click here to delete a safety assessment. → [delete](#)

Case ID: 15054
Case Name: Moor, Randy
Case Status: N/A
Case Category: Ongoing

Safety Assessment Filter Criteria
Date Range: From: [] To: []
Sort Results By: Safety Assessment ID (Asc)

[Filter](#) [Clear Form](#)

Safety Assessment						
Result(s) 1 to 8 of 8						
	Safety Assessment ID	Status	Date of Approval	Safety Response	Agency Created	
edit report	15007	In Progress	10/24/2005	In Home SP	Adams County Children Services Board	delete
edit report	15007	Pending Approval	12/29/2005	In Home SP	Adams County Children Services Board	
view report	15007	Approved	01/03/2006	In Home SP	Adams County Children Services Board	
view report	15564	Approved	01/06/2006		Adams County Children Services Board	
view report	15670	Approved	01/06/2006	In Home SP	Adams County Children Services Board	
view report	16038	Approved	01/20/2006	In Home SP	Adams County Children Services Board	
edit report	15561	In Progress			Adams County Children Services Board	delete
edit report	15559	In Progress			Adams County Children Services Board	delete
edit report	15746	In Progress		In Home SP	Adams County Children Services Board	delete
edit report	16663	In Progress			Adams County Children Services Board	delete

Page 1 of 1

How to record a safety assessment

The safety assessment reflects the evaluation of safety factors or signs of present danger, past history, a child’s vulnerability, and the family’s protective capacities. This assessment is completed for all intakes with a category of child abuse and/or neglect (CA/N), dependency, and family in need of services (FINS, “Stranger Danger” type only). It helps the agency determine the appropriate safety response.

1. From the Home screen, click the Case tab.
2. Click the Workload tab. The Case Workload screen appears.
3. Click on your name or that of another worker.
4. Click the case number link. The Case Overview screen appears. This screen displays a summary of case information.

5. Click the Safety Assessment link in the menu on the left. The Safety Assessment list screen appears.
6. Click the edit link for the assessment record you want to update, or click Add Safety Assessment to create a new record. The Safety Assessment Details screen appears.
7. To link a safety assessment to an intake, click Link Intake. The Available Intakes screen appears. Complete the required fields and click Save.
8. To record safety assessment participants, click Add Child and Add Adult. The Available Participants screen appears. Complete the required fields and click Save.
9. Click the Safety Factors, Safety Considerations, and Safety Response tabs, enter required information, and click Save.
10. Click Save to return to the Safety Assessment Details screen.

The screenshot shows the 'Safety Assessment' details for Case ID 15054 (Moor, Randy) and Safety Assessment ID 15007 (In Progress). The interface is divided into several sections:

- Safety Assessment Details:** Includes 'Intake Information' and 'Section 1: Identifying Information'.
- Intake Information Table:**

Intake ID	Decision Date / Time	Intake Category	Intake Type(s)	Agency
15232	10/24/2005 01:33 PM	CA/N Report	Physical Abuse	Adams County Children Services Board
- Children in the Family Table:**

Name	Role	DOB	Age	Gender	Type of Contact	Date of Contact
Moor, William	ACV	10/05/1992	13	MALE		
- Adults in the Family Table:**

Name	DOB	Age	Gender	Relationship to Child	Type of Contact	Date of Contact
Moor, Mandu	04/05/1975	30	MALE	relationship		

Callouts and buttons are as follows:

- Top Left:** Click here to view, add, or update details of a safety assessment. (Points to the 'Safety Assessment' tab)
- Top Middle-Left:** Click here to add or update details of a safety factor in an assessment. (Points to the 'Safety Factors' tab)
- Top Middle-Right:** Click here to add or update safety considerations in an assessment. (Points to the 'Safety Considerations' tab)
- Top Right:** Click here to view, add, or update the conclusions drawn from a safety assessment. (Points to the 'Safety Response' tab)
- Intake Table:** 'Link Intake' button below the table; 'delete' link at the end of the row.
- Children Table:** 'Add child' button below the table; 'delete' link at the end of the row.
- Adults Table:** 'Add Adult' button below the table; 'delete' link at the end of the row.
- Bottom Right:** 'Click here to delete an intake from this safety assessment.' (Points to the 'delete' link in the Intake table)
- Bottom Right:** 'Click here to delete a child from this safety assessment.' (Points to the 'delete' link in the Children table)
- Bottom Right:** 'Click here to delete an adult from this safety assessment.' (Points to the 'delete' link in the Adults table)

How to record safety factors in a safety assessment

The assessment requires you to identify the safety factors that are currently present. The evaluation of safety factors forms the core of the assessment and leads to the safety response.

1. In the Safety Assessment Details screen, click the **Safety Factors** tab. The Safety Factors screen appears.
(For instructions on how to access the Safety Assessment Details screen, see page 6-4.)
2. Click the **edit** link next to the description. The Safety Factors Details screen appears.
3. Enter a detailed response in the **Explain** field to the

circumstance described above it, whether the statement is true or not true for these participants.

4. Select **Yes** or **No** in the **Response** field, to indicate whether the statement is true for these participants.
5. Select the **Further Assessment Needed** check box if further evaluation is required in order to fully address this statement.
6. Click **OK**. You are returned to the Safety Factors screen.
7. Repeat steps 2-6 for each statement on this screen.
8. Click **Apply** to save the information.

Click here to add or update further details for this safety assessment.

Click here to add or update details of a safety factor in an assessment.

Click here to edit answers to a safety factor in this assessment.

The screenshot displays the 'Safety Assessment' interface. At the top, there are tabs for 'Safety Assessment', 'Safety Factors', 'Safety Considerations', and 'Safety Response'. The 'Safety Factors' tab is active. Below the tabs, the case information is shown: Case ID: 15054, Case Name: Moor, Randy, Safety Assessment ID: 15007, Status: In Progress. The main section is titled 'Section 2: Safety Factors' and contains a table of safety factor questions and responses. Each row includes a question number and text, a 'Response' field with 'No' selected, and an 'edit' link. The questions are: 1. A child has received serious, inflicted, physical harm. 2. Caretaker has not, cannot, or will not protect the child from potential serious harm, including harm from other persons having familial access to the child. 3. Caretaker or other person having access to the child has made a credible threat which would result in serious harm to a child. 4. The behavior of any member of the family or other person having access to the child is violent and/or out of control. 5. Acts of family violence pose an immediate and serious physical and/or emotional danger to the child. 6. Drug and/or alcohol use by any member of the family or other person having access to the child suggests that the child is in immediate danger of serious harm.

How to record safety considerations in a safety assessment

The assessment requires you to explain whether the caretaker, or other person with access to the child, has or may have abused or neglected the child. You describe how each child's characteristics contribute to or decrease the likelihood of serious harm. You also identify the strengths and resources the family members have that can reduce, control, or prevent threats of serious harm and how these capabilities can be used to ensure child safety.

1. In the Safety Assessment Details screen, click the **Safety Considerations** tab. The Safety Considerations Details screen appears.

(For instructions on how to access the Safety Assessment Details screen, see page 6-4.)

2. Click the **Section 3: Historical Information** link. This link opens a list of past intake reports and a narrative field. Enter a detailed response.
3. Click the **Section 4: Child Vulnerability** link. This link opens a list of the child participants in the assessment and their vulnerabilities. Enter a detailed response.
4. Click the **Section 5: Protective Capacities** link. This link opens a list of the adult participants in this assessment and their strengths and resources. Enter a detailed response.
5. Click **Apply** to save the information.

Click here to add or update details of safety considerations in an assessment.

Click here to view or update a history of all intakes in which the participants of this safety assessment were involved.

Click here to view or update child(ren) vulnerabilities in the family and how they may contribute to harm.

Click here to view or update adult strengths and resources and how they may aid in protection.

Case > Workload > Safety Assessment

Safety Assessment		Safety Factors		Safety Considerations	
Case ID:	15054	Safety Assessment ID:	15007		
Case Name:	Moor, Randy	Status:	In Progress		
Safety Considerations Details					
Section 3: Historical Information					
Name	DOB	Intake ID/Category/Type	Disposition Date		
Moor, William	10/05/1992	16606_CANRPT Physical Abuse			
Moor, William	10/05/1992	16607_CANRPT Neglect			
Moor, William	10/05/1992	16638_CANRPT Medical Neglect			
Moor, William	10/05/1992	17089_CANRPT Physical Abuse			
Moor, William	10/05/1992	16640_CANRPT Physical Abuse			
Moor, Randy	04/05/1975	16232_CANRPT Medical Neglect			
Moor, Randy	04/05/1975	17089_CANRPT Physical Abuse			
Moor, Randy	04/05/1975	16640_CANRPT Physical Abuse			
Moor, Randy	04/05/1975	16638_CANRPT Medical Neglect			
Moor, Randy	04/05/1975	16607_CANRPT Neglect			
Moor, Randy	04/05/1975	16606_CANRPT Physical Abuse			
Describe if the caretaker or other person having access to the child has or may have previously seriously abused or neglected a child. Also, describe if any child in the seriously abused and/or neglected.					
N/A change					
Spell Check					
Section 4: Child Vulnerability					
Section 5: Protective Capacities					

How to record a response to a safety assessment

When you have completed your evaluations, you document the safety response for each child. The case review/Semiannual Administrative Review (SAR) record must contain certain information before it can be approved. If you validate the plan, you can be assured that all fields are completed prior to submitting it for approval. When complete, submit it to your supervisor for approval.

1. In the Safety Assessment Details screen, click the **Safety Response** tab on the safety assessment. The Section 6: Safety Response screen appears.

(For instructions on how to access the Safety Assessment Details screen, see page 6-4.)

2. Complete the fields on this screen. For each child listed, select the safety response from the drop-down list.
3. Click **Apply** to save the information.
4. Click **Validate for Approval**. The system checks that all information required for approval has been entered. It displays a dialog box listing any missing information. Click **OK** to close the dialog box and update any records.
5. Click **Process for Approval**. The system checks that all required information has been entered. If any is missing, it will list the specific topics in the validation screen. Complete that information and click **Process for Approval**. This request is sent to your supervisor's workload.

Click this check box if the children in the home are not at immediate risk of neglect or injury.

If the children are not safe, click here to select the response that applies to each child listed.

Click the appropriate check boxes to identify the specific safety responses.

Click here to view, add, or update the conclusions drawn from a safety assessment.

Case > Workload > Safety Assessment

Safety Assessment		Safety Factors		Safety Considerations	
Case ID:	15054	Safety Assessment ID:	15007		
Case Name:	Moor, Randy	Status:	In Progress		

Section 6: Safety Response

Safety Response Details

All Children in the Home are Safe

Select the appropriate safety response for each child:

Name	Safety Response
Moore, William	In Home SP

Generate Safety Response

If more than one safety response is indicated, explain to whom each safety response applies and why. If a safety response is needed, identify any children not included in placement and explain why their protection from immediate danger of serious harm is not necessary.

N/A

Spell Check

Safety Response

- Safe
- Mapping Default
- In Home SP
- Out Home SP
- Legally Out Placement
- Not Included in SP

How to view a family assessment

A family assessment helps you assess risk and identify the family’s strengths and needs, to determine the level of service the family needs. The family assessment must be completed if the agency intends to provide ongoing services. This assessment is completed for all intakes with a category of child abuse and/or neglect (CA/N), dependency, and family in need of services (FINS, “Stranger Danger” type only).

The assessment is optional for intakes within the family in need of services category.

1. From the Home screen, click the Case tab.
2. Click the Workload tab. The Case Workload screen appears.

3. Click on your name or that of another worker.
4. Click the case number link. The Case Overview screen appears. This screen displays a summary of case information.
5. Click the Family Assessment link in the menu on the left. The Family Assessment list screen appears.
6. Click the view link for the family assessment you want to view. The Participant Information screen appears.
7. Click the Safety Review, Strengths & Needs, Risk Assessment, and Case Analysis tabs to view information on each of these screens.
8. Click Cancel to return to the Family Assessment list screen.

Click here to view the safety threat present.

Click here to view details describing levels of functioning for child, adult, family, and historical details.

Click here to view the risk assessment for this family.

Click here to view the final case decision, including a disposition.

Case > Workload > Family Assessment

Participants | Safety Review | Strengths & Needs | Risk Assessment | Case Analysis

Case ID: 8016409 | Family Assessment ID: 8016243
Case Name: Stone (CM)08, Wilma | Family Assessment Status: Approved

Participant Information

Intake Information

Intake ID	Decision Date / Time	Intake Category	Intake Type (s)	Safety Assessment ID	Safety Response	Agency	Case Disposition
8017693	01/03/2005 02:00 pm	CA/N Report	Physical Abuse	8016449	Out Home SP	Franklin County Children Services Board	Substantiated

Children in the Family

Name	Role	DOB	Age	Gender
Slate (CM)08, Rockette	Alleged Child Victim (ACV)	01/22/1999	8	Female
Stone (CM)08, Sandy	Other involved child (OIC)	02/22/2002	4	Female
Stone (CM)08, Barney	Other involved child (OIC)	05/12/2003	3	Male

Adults in the Family

Caregiver	Name	Role	Relationship to Child	DOB	Age	Gender
	Stone (CM)08, Fred	Alleged Perpetrator (AP)	relationship	09/25/1981	25	Male
	Stone (CM)08, Wilma	Parent	relationship	09/30/1983	23	Female

How to record a family assessment

A family assessment helps you assess risk and identify the family's strengths and needs, to determine the level of service the family needs. The family assessment must be completed if the agency intends to provide ongoing services. This assessment is completed for all intakes with a category of child abuse and/or neglect (CA/N), dependency, and family in need of services (FINS, "Stranger Danger" type only).

1. From the Home screen, click the **Case** tab.
2. Click the **Workload** tab. The Case Workload screen appears.
3. Click on your name or that of another worker.
4. Click the case number link. The Case Overview screen appears.
5. Click the **Family Assessment** link in the menu on the left.

The Family Assessment list screen appears.

6. Click the **edit** link for an assessment you want to update, or click **Add Family Assessment** to add a new record. The Participant Information screen appears.
7. To link a family assessment to an intake, click **Link Intake**. The Available Intakes screen appears. Complete the required fields and click **Save**.
8. To record family assessment participants, click **Add Child** and **Add Adult**. The Available Participants screen appears. Complete the required fields and click **Save**.
9. Click the **Safety Review**, **Strengths & Needs**, **Risk Assessment**, and **Case Analysis** tabs, enter required information, and click **Save**.
10. Click **Save** to return to the Family Assessment list screen.

The screenshot shows the 'Case > Workload > Family Assessment' screen. It features several tabs: **Participants**, **Safety Review**, **Strengths & Needs**, **Risk Assessment**, and **Case Analysis**. The **Participants** tab is active, displaying case details (Case ID: 8016450, Case Name: Waite08, Debbie; Family Assessment ID: 16284, Family Assessment Status: In Progress) and three main sections: **Participant Information**, **Children in the Family**, and **Adults in the Family**.

Participant Information: Includes an 'Intake Information' table with columns for Intake ID, Decision Date / Time, Intake Category, Intake Type(s), Safety Assessment ID, Safety Response, Agency, and Case Disposition. A 'Link Intake' button is located below the table.

Children in the Family: Includes a table with columns for Name, Role, DOB, Age, and Gender. An 'Add Child' button and a 'Change Roles' button are located below the table.

Adults in the Family: Includes a table with columns for Caregiver, Name, Role, Relationship to Child, DOB, Age, and Gender. An 'Add Adult' button and a 'Change Roles' button are located below the table.

Callouts point to various elements:

- 'Click here to view the safety threat present.' points to the **Safety Review** tab.
- 'Click here to view details describing levels of functioning for child, adult, family, and historical details.' points to the **Strengths & Needs** tab.
- 'Click here to view the risk assessment for this family.' points to the **Risk Assessment** tab.
- 'Click here to view the final case decision, including a disposition.' points to the **Case Analysis** tab.
- 'Click here to link this intake to a family assessment.' points to the **Link Intake** button.
- 'Click here to add child participants in this family assessment.' points to the **Add Child** button.
- 'Click here to add adult participants to this family assessment.' points to the **Add Adult** button.
- 'Click here to change the role of a child participant.' points to the **Change Roles** button for children.
- 'Click here to change the role of an adult participant.' points to the **Change Roles** button for adults.

How to link an intake to a family assessment

The family assessment evaluates the family in response to a CA/N report. This intake report, and any other relevant intakes, must be linked to the family assessment.

1. From the Participant Information screen, click **Link Intake**. The Available Intakes screen appears.
(For instructions on how to access the Participant Information screen, see page 6-9.)
2. Select the check box next to the intake record(s) you want to link to this family assessment.

3. Click **Save**. You are returned to the Participant Information screen. The intake you just selected appears in the Intake Information area.

Select the check box(es) to link the intake record(s) to this family assessment.

Intake ID	Decision Date	Intake Category	Intake Type(s)	Agency
<input type="checkbox"/> 16044	11/21/2005	Family in Need of Services	Preventative Services	Adams County Children Services Board
<input type="checkbox"/> 16019	11/21/2005	CA/N Report	Physical Abuse	Adams County Children Services Board

How to record a risk assessment

The family assessment includes a risk assessment if this is a CA/N report. It classifies families based on similar characteristics with a family who have or have not repeatedly maltreated their children. It differentiates cases with intensive, high, moderate, or low classification categories.

1. From the Participant Information screen, click the **Risk Assessment** tab. The Risk Scores screen appears.
(For instructions on how to access the Participant Information screen, see page 6-9.)
2. Select the radio button next to the answer for each item listed on the Risk Scores screen.
3. Click Calculate Scores. The system determines a risk score

based on your selections.

4. Click the **Policy Override** link. The Policy Override screen appears. If you are overriding the actual risk level, select Yes in the **Apply Policy Override** field. If not, select No.
5. Select the check box next to the reason for the override. The system displays the level at which you can override an actual risk score.
6. Explain the reason for the override and click **Apply**.

The screenshot shows the 'Policy Override' screen in the Risk Assessment section. The screen has a navigation bar with tabs: Participants, Safety Review, Strengths & Needs, Risk Assessment, and Case Analysis. The 'Risk Assessment' tab is active. The main content area is titled 'Risk Scores | Policy Override' and displays case information: Case ID: 8016450, Case Name: Waite08, Debbie, Family Assessment ID: 16284, and Family Assessment Status: In Progress. Below this is the 'Policy Override' section, which includes an 'Actual Risk Level Summary' with 'Neglect Score: Uncalculated', 'Abuse Score: Uncalculated', and 'Actual Risk Level: Uncalculated'. The 'Policy Override Information' section has an 'Apply Policy Override:' dropdown menu set to 'Yes'. Below this is a list of reasons for override with checkboxes: 'An in-home or out-of-home safety plan is still active.', 'A non-accidental physical injury to any age child requiring medical treatment', 'Death (previous or current) of a caregiver's child or any other child in their care as a result of abuse or neglect', 'Sexual abuse cases where the alleged perpetrator is likely to have immediate access to the child victim', 'Cases with non-accidental physical injury to an infant', and 'Positive toxicology screen of child at birth'. A text area for 'Describe Reasons for Any Mandatory Policy Override:' is at the bottom, along with a 'Spell Check' button. Annotations with arrows point to the 'Apply Policy Override' dropdown, the list of reasons, and the 'Calculate Scores' button (labeled 'Click here to display the risk assessment scores.').

Click here to display the risk assessment scores.

Click here to apply a policy override to the calculated results.

Click here to display the Risk Scores screen.

Select Yes if you are overriding the calculated risk assessment results, and then complete the rest of the screen. If you select Yes, the system indicates the final risk level is "Intensive."

Select the check box(es) that describe the reason why this assessment level should be "Intensive." You must select at least one check box before this family assessment may be approved.

How to record a case analysis

Once you have completed the family assessment, you determine whether the alleged child abuse or neglect was substantiated, indicated, or unsubstantiated. You explain your determination on the case analysis.

1. From the Participant Information screen, click the **Case Analysis** tab. The Case Decision screen appears. The system generates the **Preliminary Matrix-Indicated Case Decision** based on the most severe case disposition and the final risk level.

(For instructions on how to access the Participant Information screen, see page 6-9.)

2. To override the system-calculated disposition, complete

the fields in the Discretionary Override Information area.

3. In the narrative field in the **Final Case Decision** area, explain your determination, then select a decision in the **Final Case Decision** field and click **Apply**.
4. Click the **Service Planning** link. The Service Planning screen appears. Select the check box next to the item that describes this family's level of need. Click the plus sign next to the check box you selected, then complete the additional fields that appear.
5. If necessary, **link a service record** to this family assessment, and then click **OK** and **Apply** to return to the originating screen.

Click here to display the Case Decision screen.

Click here to link the services that are associated

Click here to record the final case decision.

Click here to record the case disposition.

Select Yes or No here to answer this question. If you select Yes, complete the following two fields.

Select the reason for the override here.

Enter a detailed explanation for the override here.

Enter an explanation of the final case decision here.

How to record a specialized assessment/investigation

A specialized assessment/investigation (A/I) is completed when the alleged perpetrator has access to the alleged child victim through his or her affiliation or employment with the child's out-of-home care provider.

1. From the Home screen, click the **Case** tab.
2. Click the **Workload** tab. The Case Workload screen appears.
3. Click on your name or that of another worker.
4. Click the case number link. The Case Overview screen appears.
5. Click the **Specialized A/I Tool** link in the menu on the left. The Specialized A/I Tool list screen appears.
6. Click the edit link to open an existing A/I or click **Add Specialized A/I** to create a new A/I record.
7. From the Participant Information screen, click **Link Intake**, select the intake(s) associated with this A/I, and click **OK**. You are returned to the Participant Information screen.
8. Click **Add Child** and **Add Adult**, select the case members who are participants in this A/I, and click **Save**. You are returned to the Participant Information screen.
9. Click the **Notifications, Assessment of Safety, and Findings and Summary** tabs and complete the fields on these screens. Click **Apply** to save the information.
10. From the **Findings and Summary** tab, click **Validate for Approval** to check for completeness.
11. Click **Submit for Approval** when the A/I is complete.

The screenshot shows the 'Specialized A/I Tool' interface. At the top, there are four tabs: **Participants**, **Notifications**, **Assessment of Safety**, and **Findings and Summary**. The **Participants** tab is active, displaying case details (Case ID: 15054, Case Name: Moor, Randy) and a 'Participant Information' section. This section includes an 'Intake Information' table, an 'All Involved Children' table, and an 'All Involved Adults' table. Callouts point to specific elements: 'Click here to link this intake to a specialized A/I.' points to the 'Link Intake' button; 'Click here to add child participants in this specialized assessment/investigation.' points to the 'Add Child' button; 'Click here to add adult participants to this specialized assessment/investigation.' points to the 'Add Adult' button; 'Click here to record the dates and times that required notifications were made.' points to the 'Decision Date / Time' column in the Intake Information table; 'Click here to record the assessment of the children's safety in the out-of-home care setting.' points to the 'Assessment of Safety' tab; and 'Click here to summarize the findings of the specialized A/I.' points to the 'Findings and Summary' tab.

Intake Information Table:

	Intake ID	Decision Date / Time	Intake Category	Intake Type(s)	Agency	
A/I Checklist	16640	01/10/2006 10-04 AM	CA/N Report	Physical Abuse	Adams County Children Services Board	delete
A/I Checklist	16638	01/09/2006 02-45 PM	CA/N Report	Medical Neglect	Adams County Children Services Board	delete
A/I Checklist	16607	01/06/2006 11-23 AM	CA/N Report	Neglect	Adams County Children Services Board	delete

All Involved Children Table:

Name	Role	DOB	Age	Gender	Type of Contact	Date of Contact	
Moor, Chris	ACV	10/21/1996	9				delete

All Involved Adults Table:

Name	Role	DOB	Age	Gender	Relationship to Child	Type of Contact	Date of Contact	
Moor, Mandy		04/05/1975	30	MALE	relationship			delete
McCannel, Brandon		12/05/1978	27	MALE	relationship			delete

How to record case services

You record case services when you identify the family's needs during the life of a case. A case service record is associated with each concern record identified on the case plan.

1. From the Home screen, click the **Case** tab.
2. Click the **Workload** tab. The Case Workload screen appears.
3. Click on your name or that of another worker.
4. Click the case number link. The Case Overview screen appears.
5. Click the **Case Services** link in the menu on the left. The Case Services list screen appears.
6. Click the **edit** link next to the case member name to update

the details of a service record, or select a name in the **Case Service Member** field and click **Add Case Services** to create a new case services record. The Service Information screen appears.

7. Complete at least the required fields: **Effective Date**, **Service Category**, **Service Type**, and **Status**. If the service is planned or provided, complete the dates fields.
8. Click **Add Service Group**, complete the Service Group History Details screen, and click **OK**.
9. Click **Link Provider**, then search for and select a provider. This link initiates the payment of services, identified as "paid" services, for which payment has been authorized. Only one provider can be linked to a case service record.
10. Click **Save** to return to the Case Services list screen.

Click here to record details of a service record.

Click here to see a list of review dates and recommendations.

Enter these required fields.

Click here to add a group providing services for this case.

Click here to link the service record with a particular provider.

How to record justification/waiver

An assessment must be completed within 30 days of the receipt of an intake report. You may determine that a piece of the assessment cannot be completed within this time. In this case, you may request, with a justification, a 15-day extension. The agency director and/or designee must approve the extension. Justifications apply only to intakes of category CA/N and Family in Need of Services (“Stranger Danger” type).

1. From the Home screen, click the Case tab.
2. Click the Workload tab. The Case Workload screen appears.
3. Click on your name or that of another worker.
4. Click the case number link. The Case Overview screen appears.
5. Click the Justification/Waiver link in the menu on the left. The Maintain Justification Request(s) list screen appears.
6. Click the edit link for a justification request to update the record, or click **Add Justification Request** to create a new request. The Justification Request Details screen appears.
7. Click the radio button next to the intake to which this request applies.
8. Click **Associate Justification**. The Justification Type Details screen appears. Complete the **Justification Type** field.
9. Select the check box next to the participant(s) to whom the activity applies. If you want to include participants from other associated intakes, click **Add Participant**.
10. Click OK, then complete the **Reason for Justification** field. Click **Process Approval**, then click **Save**.

Click here to select the intake to which this justification applies.

Click here to identify the type of justification you are requesting and to identify the intake participants to whom the activity applies.

Enter an expansion of the need for this waiver here.

Click here to submit the justification waiver for approval.

Case > Workload > Justification/Waiver

Case ID: 8016409 Case Status: Open
Case Name: Stone (CM)08, Wilma Case Category: Ongoing

Justification Request Details
Requested Date: Requestor Name:
Decision Date: Approver:
Status: In Progress

Intake Information

Intake ID	Date Received	Intake Category	Intake Type
<input type="radio"/> 8017693	01/03/2005	CA/N Report	Physical Abuse

Justification Type(s)

Justification Type	Intake Participants
<input type="button" value="Associate Justification Type"/>	

Reason for Justification: *

Chapter 7

Case Management

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Case Management

Case management in Ohio SACWIS consists of all work related to a SACWIS family as defined by participation in a family case. A family case is a record comprised of members for the purpose of providing, recording, and supervising services. A case is created at the end of the intake process. The screening decision maker screens in the intake, then either links the intake to an existing case record or creates a new case to which the intake is linked. The screening decision maker also assigns the case to a caseworker. The caseworker sees the new case in his or her workload.

When you open a new family case record, the system displays the Case Overview screen. This screen displays a summary of information about a case. The links in the menu on the left allow you to view or add other kinds of records associated with the case, for example, assessments, court activities, case services, case plans, placements, and so on.

Working with case plans

The case plan in Ohio SACWIS is the tool used for addressing the overall needs of the family or case participants. Case plans can be ordered by the court or initiated by the responsible agency without court involvement.

Workers are responsible for identifying strengths and concerns and developing the case plan to provide the appropriate services that benefit the family or individual child. You can complete one of three types of case plans:

- **Initial Case Plan.** The first case plan documented for the family within a case episode (open date to close date).
- **Amended Case Plan.** Completed when there is an existing case plan during the current case episode, and a change is required to services, placements, visitation, or so on.
- **Proposed Case Plan.** Completed and filed with the court when the agency files for permanent custody.

A **case episode** is opened on one date and closed on another date. A case can be re-opened and closed several times.

Performing a case review

In Ohio SACWIS, the case review and semi-annual administrative review (SAR) are combined into one set of screens, which are completed at some point after the case plan record is in place.

A **case review** allows you to re-examine the safety, risk and describe the impact of services on the family. Like the case review, the **SAR** allows you to evaluate how services provided to families have affected the safety, risk, and the well-being of the children in the case plan. A case review is associated with a case plan.

This chapter explains:

- How to view a case record
- How to record a case profile
- How to view the case activity log
- How to record case activity details
- How to view supervisor case conference notes
- How to record a case plan
- How to view service information
- How to record case services
- How to record a child's removal from home
- How to record a placement request
- How to record placement information
- How to record an end to a placement
- How to record a case review/SAR
- How to record an independent living plan
- How to record a visitation plan
- How to record a reunification assessment
- How to close a case

How to view a case record

You can open a case record from your case workload screen if you are assigned to a case. Or you can use the universal search tool, which is available from anywhere in the application (see page 2-5).

Open a case record assigned to you as follows:

1. From the Home screen, click the **Case** tab.
2. Click the **Workload** tab. The Case Workload screen appears.
3. Click on your name or that of another worker.
4. Click the case number link. The Case Overview screen appears. This screen displays a summary of case information.
5. To view the case profile, click the **View Case Information** link

in the Case Actions group box. The Case Details screen appears. It displays caseworker assignments and histories, as well as any reference IDs used on this case.

6. Click on the **Members, Relationships, and Associated Persons** tabs to view information about the people involved in the case.
7. Click **Cancel** to return to the Case Overview screen.
8. Click the links in the menu on the left to view or update other records associated with this case.
9. Click **Case Overview** in the menu on the left at any time to return to the Case Overview screen.

Identifying information about the case appears in the header.

Click here to the case profile.

Click here to view a listing of the intakes that are linked to this case.

Click these links to view a variety of records related to this case.

Worker Name	Supervisor	Role	Agency
Berry, Brant01		Supervisor	Adams County Children Services Bo
Berry, Brant02	A/I Worker		Adams County Children Services Bo
Berry, Brant02	Assessment/Investigation Worker		Adams County Children Services Bo
Berry, Brant02	Screener		Adams County Children Services Bo

How to record a case profile

To complete the “case profile,” you add more details to the case record. This profile includes workers on the case, case reference IDs, case members and their relationships, and so on. A history of case activity is also reflected in the case profile screens.

1. In the **Case Detail** tab of the Case Information screen, select the case participant who has primary responsibility for the child in the **Primary Caretaker** field.
(For instructions on displaying the Case Information screen, “How to view a case record” on page 7-3.)
2. Select the participants who have primary and secondary responsibility for the child in the **Primary** and **Secondary**

Caretaker fields.

3. To record a reference ID number, click **Add Case Reference**. The Reference Details screen appears.
4. Complete the fields on this screen, then click **OK**. You are returned to the **Case Detail** tab.
5. Repeat steps 3 and 4 for each case reference ID number you want to add, and click **Apply**.
6. Record information in the **Members**, **Relationships**, and **Associated Persons** tabs, as applicable. Within each tab, complete the required fields and click **Apply**.
7. When you have finished entering all information, click **Save**. You are returned to the Case Workload screen.

The screenshot shows the 'Case Information' screen with the following callouts:

- Click here to identify both the individuals who are participants in the case and the case reference person.** (Points to the 'Members' tab)
- Click here to identify the relationships among case members.** (Points to the 'Relationships' tab)
- Click here to identify individuals who may have a connection to a case without being a case member or participant.** (Points to the 'Associated Persons' tab)
- Click here to select primary and secondary caretakers.** (Points to the 'Primary Caretaker' and 'Secondary Caretaker' dropdowns)
- Click here to record a reference ID number such as CRIS-E, SETS, agency ID, OWF, or other ID numbers.** (Points to the 'Add Case Reference' button)
- Click here to view a history of case status.** (Points to the 'View Case Status History' link)
- Click here to view a history of staff assigned to this case.** (Points to the 'View Assignment History' link)

Case Detail
 Case ID: 15054
 Case Name: Moor, Randy
 Case Address: 4444 Crook RD, columbus, OH 43334

Case Status: N/A
Case Category: Ongoing
Agency: Adams County Children Services Board
Geo Code:

Assignment Information

Worker Name	Role	Agency of Worker
Berry, Brant01	Supervisor	Adams County Children Services Board
Berry, Brant02	A/I Worker	Adams County Children Services Board
Berry, Brant02	Assessment/Investigation Worker	Adams County Children Services Board
Berry, Brant02	Screeener	Adams County Children Services Board
Berry, Brant02	Supervisor	Adams County Children Services Board
Berry, Brant02	Worker	Adams County Children Services Board
Miller, Duncan	Supervisor	Adams County Children Services Board
Smith, Tim		Ohio Department of Job and Family Serv

Primary Caretaker: Moor, Randy
Secondary Caretaker:

Reference List

Reference Type	Reference Number	Description
Add Case Reference		

Buttons: Apply, Save, Cancel

How to view the case activity log

Casework activities are documented to ensure that the system reflects a permanent record of all services and contact with a family case. You document the provision of social services to families and children at any time during the life of a case.

1. From the Home screen, click the Case tab.
2. Click the Workload tab. The Case Workload screen appears.
3. Click on your name or that of another worker.
4. Click the case number link. The Case Overview screen appears.
5. Click Activity Log in the menu on the left. The Activity Log screen appears. The top portion of the screen allows you to define the criteria for displaying the list of activity log

items that have been recorded on this case. The items are listed in the table below.

6. Select the criteria by which you want to filter the list of activity log items.
7. Click Filter. The activity log items that meet your criteria appear in the table below.
8. Click the view link next to the activity date of the item you want to view. The Activity Details screen appears.
9. Click Close to return to the Activity Log screen.

Click here to display the Activity Log screen.

Click here to filter the list of activity log items.

Click here to view details of a specific activity. Or click the edit link to update the record or the report link to print the record.

Enter criteria in any of these fields to reduce the number of activity log entries shown to you, and then click Filter below.

Click here to sort the results in a particular order.

Activity Date	Case Category	Contact Type	Category	Sub Category	Activity State
01/03/2006	Ongoing	Court	Legal	Juvenile Court	Draft

How to record case activity details

Casework activities are documented to ensure that the system reflects a permanent record of all scontacts with a family. You can update an existing case activity record in "Draft" status, or amend a "Completed" or "Attempted" activity.

1. From the Home screen, click the **Case** tab.
2. Click the **Workload** tab. The Case Workload screen appears.
3. Click on your name.
4. Click the case number link. The Case Overview screen appears.
5. Click **Activity Log** in the menu on the left. The Activity Log list screen appears.

6. For a new case activity record, click **Add Activity**. The Activity Details screen appears.
For an existing record in "Draft" status, click the **edit** link. Or click the **amend** link on a record in "Completed" or "Attempted" status.
7. Complete at least the required fields on the screen. For an amendment, click **Insert Correction** and enter a narrative.
8. Click the **Associate Participants** link to identify the case members who are participants in this activity.
9. Select the check box next to each associated participant, then click **OK**. You are returned to the Activity Details screen.
10. Click **Save** (or **Close** if this is an amendment). You are returned to the Activity Log list screen.

The screenshot shows the 'Activity Details' form for Case ID 15054, Case Name Moor, Randy. The form is divided into several sections:

- Activity Details:** Includes 'Create Date' (02/12/2006), 'Responsible Worker' (dropdown), 'Start Time' (dropdown), 'Contact Duration' (dropdown), and 'Originator Of Information' (dropdown). It also shows 'Created By: Smith, Tim', 'Activity Date' (calendar icon), 'End Time' (dropdown), and 'Contact Type' (dropdown) with a 'High Priority' checkbox.
- Category Information:** Includes 'Case Category' (dropdown), 'Category' (dropdown), 'Sub Category' (dropdown), and 'Other Sub Category' (text field).
- Intake Information:** Includes 'Intake ID' (dropdown) and an 'Initial Contact' checkbox.
- Location Information:** Includes 'Location Type' (dropdown), 'Other Location' (text field), and 'Location Details' (text area).
- Activity Association:** Includes a link to 'Associate Participants'.

Callouts point to specific fields:

- 'Enter the date on which this activity occurred here.' points to the 'Activity Date' field.
- 'Select the type of contact made here.' points to the 'Contact Type' dropdown.
- 'Select the worker who performed the activity described here.' points to the 'Responsible Worker' dropdown.
- 'Select the case category here.' points to the 'Case Category' dropdown.
- 'Select the activity category here.' points to the 'Category' dropdown.
- 'Select the subcategory of activity here.' points to the 'Sub Category' dropdown.
- 'Click here to identify case members who are participants in this activity.' points to the 'Associate Participants' link.

How to view supervisor case conference notes

A supervisor reviews a worker's assignment and management of a case and records the results of this review in the case conference notes.

1. From the Home screen, click the **Case** tab.
2. Click the **Workload** tab. The Case Workload screen appears.
3. Click on your name.
4. Click the case number link. The Case Overview screen appears.
5. Click the **Case Conference Note** link in the menu on the left. The Case Conference Notes list screen appears. The case conference notes that have been recorded for this case

appear in the list on the bottom section of the screen.

6. Click the **edit** link next to the category to view the details of a particular notes record. The Case Conference Notes Details screen appears.
7. Click **View Narrative** to view addendums. The View Narratives screen appears. It displays a history of narratives that have been added to this record as addendums.
8. Click **Close**. You are returned to the Case Conference Notes Details screen.
9. Click **Cancel**. You are returned to the Case Conference Notes list screen.

The screenshot shows the 'Case Conference Note' details form. The form is titled 'Case » Workload » Case Conference Note'. It displays case information: Case ID: 8016409, Case Name: Stone (CM)08, Wilma, Case Status: Open, and Case Category: Ongoing. The 'Case Conference Notes Details' section includes fields for 'Conference Type: *', 'Start Time: *' (with an A.M. dropdown), 'Category: *', 'Conference Date: *', and 'Review Type: *'. Below this is the 'Case Conference Notes Association *' section with a link to 'Associate Assigned Workers'. A large text area for 'Narrative: *' is provided, along with 'Spell Check' and 'Clear' buttons. At the bottom, there is a 'Status: *' dropdown set to 'Draft' and 'Save', 'Cancel', and 'Delete' buttons. Annotations with arrows point to various fields: 'Select the type of supervisor conference here.' points to the 'Conference Type' dropdown; 'Select the time at which this conference took place here.' points to the 'Start Time' field; 'Select the category that applies to these notes.' points to the 'Category' dropdown; 'Click here to associate those workers assigned to this case conference.' points to the 'Associate Assigned Workers' link; 'Enter the text of your notes to the worker.' points to the 'Narrative' text area; 'Indicate whether the notes are in draft form or completed.' points to the 'Status' dropdown; 'Select the type of review here.' points to the 'Review Type' dropdown; and 'Enter the date on which the conference took place here.' points to the 'Conference Date' field.

How to record a case plan

The case plan is the tool used for addressing the overall needs of the family or case participants.

1. From the Home screen, click the **Case** tab.
2. Click the **Workload** tab. The Case Workload screen appears.
3. Click on your name.
4. Click the case number link. The Case Overview screen appears.
5. Click the **Case Plan** link in the menu on the left. The Case Plan list screen appears. It displays any case plans recorded on this case.
6. Click the edit link to update a plan in "In Progress" status,

or click **Add Case Plan** to create a new plan. The Identifying Information screen appears.

7. Select the a type in the **Case Plan Type** field.
8. Update the case plan participants: Click the **delete** link to remove a case plan participant. To add a participant, click **Add Child** or **Add Adult**, then locate and select the participant.
9. Select a permanency goal for each child, and click **Save**. The Case Plan Topics screen appears.
10. Click the links in the **Topics** column, and complete each screen as appropriate.
11. Click **Validate for Approval** to check for completeness.
12. Click **Process for Approval** when the plan is complete.

Click here to select the type of case plan.

Click here to add child case members who are participants in this case plan.

Click here to an add adult who is a participant in this case plan.

Select this check box if this legal status applies.

Select this check box if you do not have enough information to complete the case plan within the 30-day limit.

Click Person Search to locate and select the judge or magistrate presiding over this case.

Click here to remove case plan participants.

Case > Workload > Case Plans > Identifying Information

Case ID: 15054 Case Status: N/A
Case Name: Moor, Randy Case Category: Ongoing

Identifying Information

Case Plan Type: * [dropdown] Plan Number: 3.0 Status: In Progress

Child(ren) Participating in the Case Plan

Name	DOB	Type of Placement	Child's Permanency Goal	Court Case/ID #
edit Moor, William	10/05/1992		[dropdown]	delete

[Add Child](#)

Adult(s) Participating in the Case Plan

Name	Relationship to Child	DOB	Age
edit Moor, Randy	relationship	04/05/1975	30

[Add Adult](#)

Additional Information

Court Order Protective Supervision in Home Services - No Custody

Sufficient Information is not Available to Complete Case Plan within 30 Days

Justify the Reason the Agency is not able to Complete the Case Plan within 30 Days and the Steps that will be Taken to Obtain the Missing Information:

Judge/Magistrate: [input] [Person Search](#)

How to view service information

Case services are recorded whenever the need for them has been identified during the life of a case.

1. From the Home screen, click the **Case** tab.
2. Click the **Workload** tab. The Case Workload screen appears.
3. Click on your name.
4. Click the case number link. The Case Overview screen appears.
5. Click the **Case Services** link in the menu on the left. The Case Services list screen appears.
6. Click the **view** or **edit** link next to the case member name to view the details of a particular service record. The Service Information screen appears.
7. Click the **Service Review** tab to see a list of review dates and recommendations. The Service/Activity Review screen appears.
8. Click the **view** or **edit** link next to the date of a review to see the narrative comments, then click **Cancel** to return to the Service/Activity Review screen.
9. Click **Cancel** to return to the Case Services list screen.

Click here to view details of a service associated with this case.

Click here to view a list of service review dates and recommendations.

Click here to view details of a specific service review record.

Click here to add a service activity or review for this case.

The screenshot shows the 'Service Information' and 'Service Review' tabs. The 'Service Information' tab is active, displaying case details: Case ID: 15054, Case Name: Moor, Randy, Case Status: N/A, Case Category: Ongoing. Below this is a 'Service/Activity Review' section with a table. The table has columns for Review Date, Service Recommendation, Barriers Exist, and Barrier Type. A row shows a review on 02/06/2006 with a recommendation to 'Continue', 'Yes' for barriers, and 'Special Needs' for barrier type. There are 'edit' and 'view' links for this row. An 'Add Service Review' button is at the bottom.

Review Date	Service Recommendation	Barriers Exist	Barrier Type
02/06/2006	Continue	Yes	Special Needs

How to record case services

You record case services whenever you identify the family's needs during the life of a case. A case service record must be associated with each concern (risk contributor) record identified on the case plan.

1. From the Home screen, click the Case tab.
2. Click the Workload tab. The Case Workload screen appears.
3. Click on your name.
4. Click the case number link. The Case Overview screen appears.
5. Click the Case Services link in the menu on the left. The Case Services list screen appears.

6. Click the **edit** link next to the case member name to update the details of a service record, or click **Add Case Services** to create a new case services record. The Service Information screen appears.
7. Complete at least the required fields, including **Effective Date**, **Service Category**, **Service Type**, and **Status**. If the service is planned or provided, complete the dates fields. Select the check box for each applicable caregiver service.
8. Click **Add Service Group** to add a service group if necessary.
9. Click **Link Provider** to link the service record with a provider if a particular provider will be providing this service.
10. Click **Save** to return to the Case Services list screen.

Click here to record details of a service record.

Click here to see a list of service review dates and recommendations.

Enter these required fields.

Click here to identify the service group, which associates the service with a case plan goal or phase of activity.

Click here to link the service record with a particular provider. This link initiates the payment of services, identified as "paid" services, for which payment has been authorized. Only one provider can be linked to a case service record.

How to assign a service to a service group

When you record a case service, you assign a service group to the service. The service group associates the service with a phase of activity or with a case plan goal.

1. From the Home screen, click the Case tab.
2. Click the Workload tab. The Case Workload screen appears.
3. Click on your name.
4. Click the case number link. The Case Overview screen appears.
5. Click the Case Services link in the menu on the left. The Case Services list screen appears.
6. Click the edit link next to the case member name to update the details of a service record, or click **Add Case Services** to create a new case services record. The Service Information screen appears.
7. Click **Add Service Group**. The Service Group History Details screen appears.
8. Complete the **Service Group** and **Effective Date** fields. (Both are required.)
9. Click **OK** to return to the Service Information screen. The newly assigned group is displayed in the Service Group History list.
10. Click **Save** to return to the Case Services list screen.

Click here to select from a list of service groups.

Enter the effective date here.

Click OK to return to the previous screen.

How to record a child's removal from home

A placement episode begins when the child is taken into physical custody of the agency or when the child is placed under a formal agreement for temporary custody among the agency, the parents, and the placement provider.

1. From the Home screen, click the **Case** tab.
2. Click the **Workload** tab. The Case Workload screen appears.
3. Click on your name.
4. Click the case number link. The Case Overview screen appears.
5. Click the **Initial Removal** link in the menu on the left. The Initial Removal information screen appears.

6. Click the **edit** link next to the child's name to update removal information on a record that is in "Draft" status. Or select a name in the **Child's Name** field and click **Add Removal Record** to create a new record. The Removal Information screen appears.
7. Complete all the fields on the screen (except the discharge information).
8. Click **Apply** to save the information.
9. Click the **Removal Circumstances** tab. The Removal Circumstances screen appears.
10. Enter a detailed answer in each narrative field.
11. Click **Save** to return to the Initial Removal list screen.

The screenshot shows the 'Initial Removal' form with two tabs: 'Removal Information' and 'Removal Circumstances'. The 'Removal Information' tab is active. The form contains the following fields and sections:

- Case ID:** 15422
- Case Name:** raja, sekhar
- Case Status:** Open
- Case Category:** Adoption
- Removal Information Section:**
 - Child's Name:** raja, sekhar.
 - Current Legal Status:** * (dropdown menu)
 - Circumstances:** * (dropdown menu)
 - Responsible School District:** * (dropdown menu)
 - Date Removed:** * (calendar icon)
- Child Removal from Home Information Section:**
 - Primary Caretaker:** * (dropdown menu)
 - Caretaker Structure:** * (dropdown menu)
 - Secondary Caretaker:** (dropdown menu)
- Available Removal Reasons:**
 - Mapping Default
 - Physical Abuse
 - Death of Parent(s)
 - Sibling Removal
 - Child's Disability
- Selected Removal Reasons:** * (empty box)
- Buttons:** Add >, < Remove
- Discharge Date:** (calendar icon)
- Discharge Reason:** (dropdown menu)
- Status:** * (dropdown menu, currently set to Draft)

Annotations on the left side of the form:

- Click here to record details of a child's removal from home. (points to the top left of the form)
- Click here to record detailed narratives describing the circumstances of a child's removal. (points to the top right of the form)
- Select the child's current legal status here. (points to the Current Legal Status dropdown)
- Select the school district in which the child is a student. (points to the Responsible School District dropdown)
- Select those persons who take primary and secondary responsibility for the child's care here. (points to the Primary Caretaker dropdown)
- Select all reasons for removal here, then click Add>. (points to the Available Removal Reasons list)
- Enter discharge information only when the child's current legal status on the removal record is "Child." (points to the Discharge Date field)
- Select the status of this removal from home. (points to the Status dropdown)

Annotations on the right side of the form:

- Select circumstances of removal here. (points to the Circumstances dropdown)
- Enter the date on which the child was removed from home. (points to the Date Removed field)

How to record a placement request

You record a placement request to locate a substitute care placement for a child or a sibling group. This optional task helps ensure that children are matched with substitute caregivers who will meet their needs.

1. From the Home screen, click the Case tab.
2. Click the Workload tab. The Case Workload screen appears.
3. Click on your name.
4. Click the case number link. The Case Overview screen appears.
5. Click the Placement Request link in the menu on the left. The Placement Requests list screen appears.
6. Click the edit link next to the name of the child whose placement request you want to update, or click **Add Placement Request** to create a new placement request. The Placement Request Details screen appears.
7. Complete the required fields on the screen. To record a child's leave from placement, click the **leave** link to the right of the status on the record you want to update, and click **edit** or **Add Placement Leave**.
8. To link a certain provider with this placement request, complete the **Service Type** field, then click **Link Provider**. This displays the Provider Match screen, which allows you to locate and select the provider.
9. Enter any other data in the **Additional Information** field.
10. Click **Save**. You are returned to the Placement Requests list screen.

Select the primary worker on this child's case here.

Indicate here whether efforts should be made to place this child with his or her siblings.

Select a service type here in order to match a specific provider to a placement request.

Click here to view potential provider matches for selected services.

Click here to locate and select a specific provider and link the provider with this placement request.

Enter text describing any additional information about the end of this placement.

Case > Workload > Placement Requests

Case ID: 10589 Name: Lamb, Marie Elizabeth Category: Ongoing Services Status: Open

Placement Request Details

Agency: Franklin County Children Services Request Date: 02/24/2005

Child Name: Rodriguez, Roger Joseph DOB: 01/01/2001

Responsible Caseworker: * Wolfe, Cheryl

Responsible Placement Worker: [Employee Search](#)

Placement With Siblings Preferred: *

Placement Needed Date:

Service Type:

Estimated End Date:

Status: *

Potential Matches

	Provider Name(s)	Service Description	Match Status	Rejection Reason	Rejection Date
view	Stubbs, Mike; Jamie Stubbs	Family Foster Care - Level 1	Accepted		
view	Wilson, Alana	Family Foster Care - Level 1	Rejected	Rejected by Provider	03/11/2005
view	Croninger, Denise		Contacted		

[Link Provider](#)

Additional Comments:

Placement Details

Note: To complete placement of the child with the Accepted Provider, click **Record Placement**. If you have completed Placement Request Work and you do not wish to record a placement from the request record please select the appropriate status for the record. Caseworkers can also choose to record a placement.

How to record placement information

When a child has been placed, you document initial and all subsequent placement information. This allows workers to track all placements of a child with whom the agency is actively involved.

1. From the Home screen, click the Case tab.
2. Click the Workload tab. The Case Workload screen appears.
3. Click on your name.
4. Click the case number link. The Case Overview screen appears.
5. Click the Placement link in the menu on the left. The

Placement Records list screen appears.

6. Click the **edit** link next to the name of the child whose placement record you want to update, or click **Add Placement Record** to create a new placement record. The Service Information screen appears. You can edit a placement record while it's in "Draft" status.
7. Complete at least the required fields on the screen. These include **Service Type**, **Begin Date**, **Placement Type**, and **Status** fields.
8. Click **Link Provider**. The Provider Matches screen appears.
9. Locate and select the provider with whom the child is being placed.
10. Click **Save**. You are returned to the Placement Records list screen.

Enter the date on which the child was placed here.

Select the Service type needed for this placement here.

Select the specific type of placement here.

Select these check boxes to indicate all factors that apply to this placement. You can select more than one check box.

Click here to view the details of the selected provider.

Click here to locate and select the provider with whom the child is being placed.

Select the status of this placement here.

How to record an end to a placement

You record an end to a placement when the child has been removed from a substitute care setting and either returned home or moved to another substitute care setting. You can end a placement only when the status of the placement record is "Complete."

1. From the Home screen, click the Case tab.
2. Click the Workload tab. The Case Workload screen appears.
3. Click on your name.
4. Click the case number link. The Case Overview screen appears.
5. Click the Placement link in the menu on the left. The Placement Records list screen appears.
6. Click the placement end link to the right of the Status column on the placement record you want to end. The Placement Ending Details screen appears.
7. Complete the fields on this screen, including End Date and End Reason fields. If you select Discharge in the End Reason field, you must also complete the Discharge Reason field.
8. Click Save. If a placement leave record is open when you attempt to save the placement end information, the system asks you to confirm the action.
9. Click OK to end both the leave record and placement record. You are returned to the Placement Records list screen.

Select the date the placement was ended and the reason why here.

Select the reason for discharge here if the child was discharged from a facility. The system applies this reason to the child's initial removal record.

Enter text describing the effort made to maintain placement here.

Enter text describing the situation that led to the removal here.

Enter text describing any additional details regarding the end of placement here.

OHIO SACWIS

home | search | help & training | switch profile | log off

Logged In : Tommy Supervisor [Franklin County Children Agency]

Case > Workload > Placement

Case ID: 10589 Name: Jones, Debby Jayne Category: Ongoing Services Status: Open

Placement Ending Details

Person ID: 20439 Child Name: Jones, Bobby DOB: 01/24/2000 Age: 4

Provider: Stubbs, Mike

End Date: *

End Reason: *

Secondary End Reason:

Discharge Reason:

Was there an effort to maintain placement?

Describe the services that were provided to maintain placement.

Explain the circumstances that led to the removal.

Additional Comments:

How to record a case review/SAR

A case review/SAR allows you to re-examine any safety issues or risks and describes the impact of services on the family. It is also allows you to assess permanency and placement issues.

1. From the Home screen, click the Case tab.
2. Click the Workload tab. The Case Workload screen appears.
3. Click on your name.
4. Click the case number link. The Case Overview screen appears.
5. Click the Case Review/SAR link in the menu on the left. The Case Review/SAR list screen appears.
6. Click the edit link for the review record you want to update, or click **Add Case Review/SAR** to create a new record. The Identifying Information screen appears.
7. Record identifying information and click **Save**. The Case Review Topics screen appears.
8. Click the links in the Topics column, and complete each screen as appropriate. The Case Analysis is the final topic you complete.
9. Click **Validate Case Review/SAR for Approval** to check for completeness.
10. Click **Process Case Review/SAR for Approval** when the review is complete.

Click here to select the type of case review.

Click the link and select the case plan being reviewed.

Case > Workload > Case Review/SAR > Identifying Information

Case ID: 8016589 Case Status: Open
Case Name: Lope208, Gloria Case Category: Assess/Invest

Identifying Information

Case Review Type: *

If Optional Case Review, Explain:

Spell Check Clear

Case Plan being Reviewed: * [[Select Available Case Plan\(s\)](#)]

Last Review Date: Last SAR Date:

Sunset Activity: Sunset Date:

Child(ren) Participating in the Case Review

Name	Court ID	Child's Permanency Goal	Current Legal Status	Current Placement Date	Type of Placement

Adult Member(s) Participating in the Case Review

Name	Relationship To Child	DOB	Age

Save Cancel

How to record an independent living plan

The PCSA provides independent living services for emancipated youth to achieve their goals for self sufficiency. You record an independent living plan for all youth in the custody of the PCSA who are 16 years of age and older.

1. From the Home screen, click the Case tab.
2. Click the Workload tab. The Case Workload screen appears.
3. Click on your name.
4. Click the case number link. The Case Overview screen appears.
5. Click the Independent Living link in the menu on the left. The Independent Living Records screen appears.
6. Click the edit link next to the name of the youth whose plan you want to update, or select the youth's name in the Child Name field, then click Add Independent Living to create a new plan.
7. Record basic independent living plan details and click Save.
8. Click the Goals tab, record independent living plan goals and requirements, and click Save.
9. Click the Readiness Review tab, record an independent living plan readiness review, and click Save.
10. Click the Independent Living tab. Select Yes in the IL Plan Complete field, enter the Date Plan Completed, and click Save.

Click here to display the Independent Living Goals screen.

Click here to display the Readiness Review Details screen.

Enter the date on which this independent plan is in effect here.

Select the youth indicator here. You cannot change this selection once the plan is "Active."

Enter the date the youth was either referred for an independent living plan or emancipated here.

Indicate here whether a skills assessment for independent living has been completed.

Indicate here whether this independent living plan was completed. Once you enter this date, you cannot edit any requirements records.

Indicate here whether independent living plan services or training are being provided to this youth.

Select the status of the plan. It defaults to "Pending."

Enter the date on which the plan was completed.

Case > Workload > Independent Living

Independent Living | Goals | Readiness Review

Case ID: 15054 | Case Name: Moor, Randy | Case Status: N/A | Case Category: Ongoing

Agency: Adams County Children Services Board | Child Name: Moore, Mandy | DOB: 04/05/1975

Effective Date: * 02/08/2006 | Status: * Pending | End Date: |

Youth Information: * | Anticipated Emancipation Date: |

Date Referred/Emancipated: * |

Assessment/Plan Information

IL Skills Assessment Completed: * | Date Assessment Completed: |

Assessment Tool Used: | Date Plan Completed: |

IL Plan Completed: * |

Input to IL Assessment/Plan	Activity
Input was Received from the Youth when Completing: *	
Input was Received from the Youth's Case Manager when Completing: *	
Input was Received from the Youth's Significant Other when Completing: *	
Input was Received from the Youth's Substitute Caregiver when Completing: *	
Input was Received from the Youth's Parent/Guardian/Custodian when Completing: *	

Youth is Currently Receiving IL Services/Training: * |

How to record a visitation plan

You must record a visitation plan for any child for whom the agency maintains custodial rights or for whom the agency has facilitated out-of-home placement. You can create the visitation plan as a stand-alone plan or as part of the case plan.

1. From the Home screen, click the Case tab.
2. Click the Workload tab. The Case Workload screen appears.
3. Click on your name.
4. Click the case number link. The Case Overview screen appears.
5. Click the Visitation Plan link in the menu on the left. The Visitation Plan list screen appears.

6. Click the **edit** link next to the name of the child whose plan you want to update, or click **Add Visitation Plan** to create a new plan. The Visitation Plan Details screen appears.
7. Complete the fields at the top of the screen.
8. Click the **edit** link next to the name of the person the child visits to update an existing visitation record, or click **Add Visitation Information** to create a new record. The Visitation Information Details screen appears.
9. Complete the required fields on this screen and click **OK**. You are returned to the Visitation Plan Details screen.
10. Repeat steps 8-9 for each person the child may visit.
11. Select a status of this visitation plan in the **Status** field.
12. Click **Save** to return to the Visitation Plan list screen.

Select the child for whom you are creating this plan here.

Click here to enter the date on which this visitation plan takes effect.

Click here to edit the visitation plan for the selected child.

Click here to add details of a new visitation plan.

Case ID: 15054 Case Name: Moor, Randy Case Status: N/A Case Category: Ongoing

Agency: Adams County Children Services Board

Child Name: * Moor, Chris Effective Date: * 02/07/2006 Expiration Date: []

Visitation Information							
	Name	Frequency	Duration	Location	Restricted Visit	Supervised Visit	Effective Date
view	Moor Randy	Weekly	2 hours	NEUTRALOFFSITE	No	No	02/07/2006
copy							
edit							

[Add Visitation Information](#)

Status: * Completed

Enter the date on which the visitation plan expires.

Select the status of this visitation plan here.

How to record a reunification assessment

You record a reunification assessment when the agency is considering a reunification between the child and his or her biological family. The reunification assessment is a structured review to document the child's readiness to leave an out-of-home placement.

1. From the Home screen, click the **Case** tab.
2. Click the **Workload** tab. The Case Workload screen appears.
3. Click on your name.
4. Click the case number link. The Case Overview screen appears.
5. Click the **Reunification Assessment** link in the menu on the

left. The Reunification Assessment list screen appears.

6. Click the **edit** link next to the name of the child(ren) whose reunification you want to update, or click the **Add Reunification Assessment** link to create a new assessment. A screen with four tabs appears.
7. On the **Identifying Information** tab, identify the child(ren) and adults to be reunified.
8. Click **Past & Present Safety**, **Readiness**, and **Decision** tabs and answer the questions on the screens.
9. Click **Validate for Approval** to check for completeness.
10. Click **Process Approval** when the assessment is complete.

The screenshot shows the 'Reunification Assessment(s)' form for Case ID 8016409, Case Name Stone (CM)08, Wilma. The form has four tabs: Identifying Information, Past & Present Safety, Readiness, and Decision. The 'Identifying Information' tab is active, showing the agency as Franklin County Children Services Board. It contains two tables: 'Children Considered for Reunification' and 'Adult(s) Considered for Reunification'. The children table lists Slate (CM)08, Rockette (DOB 01/22/1999, Age 7, FEMALE) and Stone (CM)08, Sandy (DOB 02/22/2002, Age 4, FEMALE). The adults table lists Stone (CM)08, Wilma (DOB 09/30/1983, Age 23, FEMALE). Buttons for 'Add Child Consideration' and 'Add Adult Consideration' are present below each table. At the bottom are 'Apply', 'Save', and 'Cancel' buttons. Callouts point to the 'edit' links, the 'Add' buttons, and the 'Past & Present Safety', 'Readiness', and 'Decision' tabs.

Click here to enter the assessment of the child's safety.

Click here to enter answers to questions regarding the child's readiness for reunification.

Click here to enter a decision concerning this reunification assessment and submit it for approval.

Click here to add children who are being considered for reunification.

Click here to add adults who are being considered for reunification.

You must identify at least one child and one adult in order to save the assessment record.

How to close a case

You close a case when services to the family are no longer needed or being provided and the agency terminates involvement with the family.

1. From the Home screen, click the **Case** tab.
2. Click the **Workload** tab. The Case Workload screen appears.
3. Click on your name.
4. Click the case number link. The Case Overview screen appears.
5. Click the **Case Closure** link in the menu on the left. The Case Closure(s) list screen appears.
6. Click the **edit** link to complete a case closure in progress,

or click **Add Case Closure** to create a new case closure record.

7. Complete the fields on the screen. You must complete **Case Closure Reason**, **All Checklist Completed**, and **Ongoing Closure Checklist Completed**.
8. Click **Link Activity** to record and link a case closure activity to this record.
9. Record any additional information in the **Additional Comments** field.
10. Click **Validate for Approval**. The system checks that all work is completed on the case so that it may be closed.
11. Click **Process for Approval** when the closure record is complete.
12. Click **Save** to return to the Case Closure(s) list screen.

Click here to select the reason for closing this case.

Select Yes or No here to indicate whether you have completed the A/I checklist.

Select Yes or No here to indicate whether you completed the ongoing disclosure checklist.

Click here to record and link a case activity record to this closure record.

Enter any additional information about the closure of this case.

The screenshot shows a web-based form titled "Case > Workload > Case Closure". At the top, it displays "Case ID: 15054" and "Case Name: Moor, Randy". To the right, it shows "Case Status: N/A" and "Case Category: Ongoing". Below this is a section for "Case Closure Details" with "Agency: Adams County Children Services Board" and "Opened Date: 10/24/2005". The main form area contains three dropdown menus: "Case Closure Reason", "A/I Checklist Completed", and "Ongoing Closure Checklist Completed". Below these is a "Case Closure Summary Information" section with a "Link Activity" button. At the bottom, there is an "Additional Comments" text area with a "Spell Check" button, and two buttons: "Validate for Approval" and "Process for Approval".

Click here to validate that all work items associated with this case closure are completed.

Click here to send this case closure to your supervisor for approval.

Chapter 8

Court Activities

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Court Activities, 8-2

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Court Activities

Many cases you manage may involve the courts. Ohio SACWIS allows you to keep track of court case participants, legal actions, and your court calendar.

About court information

You access court screens from the **Court** link on the Case Overview screen for the case in focus. This link presents two views of information in the court area:

- **Case Participants.** This view presents the participants in the case and the legal records associated with each person. You can view a history of the participant's legal status changes, legal actions, and any delinquency court information. When you view one of these histories, the system presents the person profile record where these details are stored
- **Case Legal Actions.** This view presents all of the legal actions associated with this case. Such actions include motions, hearings, subpoenas, rulings for court jurisdiction transfer and legal status, and so on. From this view, you add new legal action records, or view or edit existing records.

While in much of the system you can delete records that were entered in error, in the Court area, you cannot delete legal action records. Instead, you can "invalidate" a legal action record, that is, indicate that it was entered in error. For complaint and motion records, you end the legal action and indicate that the record was an error. For other legal actions, you select a check box to indicate that the record was an error.

The system automatically creates a court calendar, based on the dates entered on the legal action record for each hearing on any case. You can view your court calendar at any time from the **Court Calendar** tab, which appears on the Case tab.

This chapter explains:

- How to view legal actions from the person profile
- How to view legal histories by case participant
- How to view legal actions by case
- How to create a legal complaint
- How to create a legal motion
- How to record a linked legal action
- How to record a legal complaint
- How to record a legal motion
- How to record a subpoena
- How to record court hearing information
- How to record a court ruling
- How to record a notification of a court action
- How to record a legal status change associated with a ruling
- How to record a legal status change on the person profile
- How to view or print a court calendar
- How to print a VAC report

How to view legal actions from the person profile

You can view a history of legal actions, legal status changes, and delinquency court details from the person profile.

1. From the Home screen, click the universal search link at the top of the screen. The Person Search window appears.
2. Enter the criteria you want to use in your search and click **Search**. The person records that meet your search criteria appear in the search results.
3. Click the **Person Profile** link below the person's name to view the profile, or click the **edit** link to the left of the person's name to choose this person.
4. Click the **Legal** link in the menu above the row of tabs. The Child Legal Status History screen appears.
5. Click the **Legal Action** tab. The Participant Legal Action History screen appears. It displays the legal actions in which this person is named as an action participant. Each link represents a legal action to which other legal actions are associated.
6. Click the plus sign or link to open a table that displays the linked legal actions.
7. Click the link in the **Legal Action** column to display the complete legal action record, then click **Close** to return to the Participant Legal Action History screen.
8. Click **Close**. You are returned to the Person Search screen.

Click here to display the Participant Legal Action History screen.

Click here to display the Child Legal Status History screen.

Click here to view the actions in groupings according to type, including complaint, ruling, or motion.

Click the links in the Legal Action column to view the complete legal action record.

Legal Status		Legal Action	
Name:	Moor, Randy	Person ID:	15629
SSN:	123-45-6789	DOB:	04/05/1975
Participant Legal Action History			
Associated Legal Actions Beginning 01/13/2006 with a Ruling			
Date	Legal Action	Type	Additional Info
01/13/2006	Hearing	Adjudicatory	
01/13/2006	Ruling	Adjudicatory	Ruling(s) Received
Associated Legal Actions Beginning 01/27/2006 with a Subpoena			
Date	Legal Action	Type	Additional Info
01/27/2006	Notification	Hearing	12345
01/27/2006	Subpoena		12345
Associated Legal Actions Beginning 01/26/2006 with a Complaint			

How to view legal histories by case participant

You can view a history of legal actions, legal status changes, and delinquency court details for each participant in a case from the participant's person profile, or from the Court area on a case.

1. From the Home screen, click the Case tab.
2. Click the Workload tab. The Case Workload appears.
3. Click your name.
4. Click the case ID number link of the case you want to view. The Case Overview screen appears.
5. Click the Court link in the menu on the left. The Case Participants screen appears.

6. Click one of these links:
 - Click the **View Legal Action History** link for the Participant Legal Action History screen, which displays the actions in which the person is identified as an action participant. Each link represents a legal action to which other actions are linked.
 - Click the **View Legal Status History** link for the Child Legal Status History screen, which displays a history of each time the child's legal status was changed.
 - Click the **View Delinquency** link for the Delinquency Information screen, which displays a history of delinquency court hearings and adjudications.
7. Click **Close**. You are returned to the Case Participants screen.

Click here to view the actions in groupings according to type, including complaint, ruling, or motion.

Case ID: 15054
Case Name: Moor, Randy
Case Status: N/A
Case Category: Ongoing

Case Participants | Case Legal Actions

Case Participants
Result(s) 1 - 5 of 5 Page 1 of 1

Case Participants	Current Legal Status	Effective Date	Expiration Date
Moor, Randy	View Legal Status History View Legal Action History View Delinquency		
Moor, William	View Legal Status History View Legal Action History View Delinquency		
Mooore, Shelly	View Legal Status History View Legal Action History View Delinquency		

[Close](#)

Click these links to view the complete legal action record.

How to view legal actions by case

As part of case management, you maintain records of all legal actions that involve the members of a case. Such actions include motions, hearings, subpoenas, rulings for court jurisdiction transfer and legal status, and so on. You can view the legal actions associated with a certain participant or all the legal actions on a case.

1. From the Home screen, click the Case tab.
2. Click the Workload tab. The Case Workload appears.
3. Click your name.
4. Click the case ID number link of the case you want to view. The Case Overview screen appears.
5. Click the Court link in the menu on the left. The Case Participants screen appears.
6. Click the Case Legal Actions link. The Legal Actions search screen appears.
7. Enter a court case number or other criteria in the Search Criteria area, then click Search. The Legal Actions table displays the actions that meet your criteria.
8. Click the view link for the legal action record you want to view. The detail screen for the legal action record appears.
9. Click Close to return to the Legal Actions search screen.

Click here to display the Legal Status list screen.

Enter search criteria and click here to display legal actions that meet your criteria.

Click here to display the Case Participants screen.

Click here to view legal action details.

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[Activity Log](#)

[Intake List](#)

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[Forms/Notices](#)

[Safety Plan](#)

[Family Assessment](#)

[Ongoing Case A/I](#)

[Specialized A/I Tool](#)

[Law Enforcement](#)

[Justification/Waiver](#)

[Case Services](#)

Court

[Initial Removal](#)

[Placement Request](#)

[Placement](#)

[Visitation Plans](#)

[Independent Living](#)

[Case Plan](#)

[Case Review/SAR](#)

[Reunification Assessment](#)

[Case Conference Note](#)

[ICPC/ICAMA](#)

[Adoption](#)

[Case Closure](#)

Case ID: 15054 Case Status: N/A

Case Name: Moor, Randy Case Category: Ongoing

Case Participants | **Case Legal Actions**

Legal Actions Search Criteria

Legal Action:

Type:

Sub-Type:

Court Case #:

Start Date: End Date:

Sort Results By:

Legal Actions	Date	Legal Action	Type	Court Case #	Action Participant(s)	Additional Info
view edit link legal action amend report	01/26/2006	Complaint	Initial		Randy Moor - 123456	Amended
view edit link legal action amend report	01/26/2006	Complaint	Refile	12345	Randy Moor - 123456	

Legal Action:

How to create a legal complaint

You “create” a complaint to add the legal action to a case and to generate a document that you are filing with a court. You can record a stand-alone complaint record, or link it to an existing legal action.

1. From the Home screen, click the Case tab.
2. Click the Workload tab. The Case Workload appears.
3. Click your name.
4. Click the case ID number link of the case you want to view. The Case Overview screen appears.
5. Click the Court link in the menu on the left. The Case Participants screen appears.
6. Click the Case Legal Actions link. The Legal Actions search

screen appears.

7. Enter the court case number or other criteria in the Search Criteria area and click **Search**. The Legal Actions table displays the actions that meet your criteria.
8. Scroll down, select Create Complaint in the **Legal Action** field, and click **Add Action**. The Complaint Details screen appears.
9. Complete the fields on this screen. You must complete the **Type of Complaint** field and add at least one action participant to the complaint.
10. Click **Save**. You are returned to the Legal Actions search screen.
11. Locate the complaint record, then click the report link and click **Generate Report**.

Enter the court-assigned case number that includes all children in a family.

Click here to select the person who swears to the truth of the information in the complaint.

Click here to add at least one action participant in this complaint to be filed with the court.

Click here to select the type of complaint you are recording.

Case ID: 15054
Case Name: Moor, Randy
Case Status: N/A
Case Category: Ongoing

Complaint Details

Court Case Number:

Reason for Ending Complaint:

Complaint Filed By: **Search Person**

Affiant: **Search Person**

Date Submitted:

Basis for Allegations:

Entered By: Smith, Tim

Type of Complaint:

File Stamp Date:

Parties to Case

Parties to Case: Moor, Randy; Moor, William; Moore, Shelly **Add >** **< Remove**

Action Participants

Action Participant Name	Allegations	Preferred Primary Disposition	Preferred Secondary Disposition
Add Participant			

How to create a legal motion

You “create” a motion to add the legal action to a case and to generate a document that you are filing with a court. You can record a stand-alone motion record, or link it to an existing legal action.

1. From the Home screen, click the **Case** tab.
2. Click the **Workload** tab. The Case Workload appears.
3. Click your name.
4. Click the case ID number link of the case you want to view. The Case Overview screen appears.
5. Click the **Court** link in the menu on the left. The Case Participants screen appears.
6. Click the **Case Legal Actions** link. The Legal Actions search

screen appears.

7. Enter the court case number or other criteria in the Search Criteria area and click **Search**. The Legal Actions table displays the actions that meet your criteria.
8. Scroll down and select **Create Motion** in the Legal Action field.
9. Click **Add Action**. The Create Motion Details screen appears.
10. Complete the fields on this screen. You must complete the **Type of Motion** and **Method of Motion** fields and add at least one action participant to the complaint.
11. Click **Save**. You are returned to the Legal Actions search screen.
12. Click the **report** link and select **Generate Report**.

Click here to select the name of the person who filed the motion with the court.

Click here to select the type of motion to file with the court.

Click here to select the method of motion. An oral motion is made during a court proceeding. A written motion is documented and filed with the court.

Enter an explanation here of why the requested disposition is in the best interest of the children.

Enter a description of the reasonable efforts the agency made to prevent placement.

Case ID: 15054
Case Name: Moor, Randy
Case Status: N/A
Case Category: Ongoing

Create Motion Details

Entered By: Smith, Tim

Motion Filed By: **Search Person**

Motion Created By: **Search Person**

Court Case Number:

Reason for Ending Motion:

Type of Motion*:

Date Submitted:

Method of Motion*:

Sub-Type:

File Stamp Date:

Motion Supported by Affidavit: No

Motion To:

Spell Check **Clear**

Motion States:

Spell Check **Clear**

Best Interest Motion Statement:

Spell Check **Clear**

Reasonable Effort Determination Motion:

Spell Check **Clear**

How to record a linked legal action

A new legal action may be linked to an existing legal action, to create a series of legal actions that represents the events on a court case.

1. From the Home screen, click the **Case** tab.
2. Click the **Workload** tab. The Case Workload appears.
3. Click your name.
4. Click the case ID number link of the case you want to view. The Case Overview screen appears.
5. Click the **Court** link in the menu on the left. The Case Participants screen appears.
6. Click the **Case Legal Actions** link. The Legal Actions search screen appears.
7. Enter the court case number or other criteria in the Search Criteria area and click **Search**. The Legal Actions table displays the actions that meet your criteria.
8. Click the **link legal action** link on the legal action record to which you want to link the new action.
9. In the **Legal Action** field, select the type of legal action you are adding and linking to this legal action that's displayed.
10. Click **Add Action**. The detail screen for the legal action you selected appears.
11. Complete the legal action details. The legal action record you create is linked to the original action you selected on the Legal Actions table.

Click here to display the Legal Actions search screen.

Click here to display the Case Participants screen.

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- [Case Plan](#)
- [Case Review/SAR](#)
- [Reunification Assessment](#)
- [Case Conference Note](#)
- [ICPC/ICAMA](#)
- [Adoption](#)
- [Case Closure](#)

Case ID: 15054 Case Status: N/A
Case Name: Moor, Randy Case Category: Ongoing

Case Legal Actions

Legal Actions Search Criteria

Legal Action:

Type:

Sub-Type:

Court Case #:

Start Date: End Date:

Sort Results By:

Search **Clear Form**

	Date	Legal Action	Type	Court Case #	Action Participant(s)	Additional Info
view edit amend report	01/31/2006	Motion	Discovery		William Moor -	Amended
view edit amend report	01/31/2006	Motion	Amended Motion		William Moor -	
view edit copy	01/27/2006	Notification	Hearing	12345	Randy Moor - 12345	
view edit amend report	01/27/2006	Motion	Set Addtl Conds in Best Interest of child		Shelly Moore -	

Click here to select the legal action record to which you want to link the new action.

How to record a legal complaint

You “record” a legal complaint when the complaint has already been filed with the court. You can record a stand-alone complaint record, or link it to an existing legal action.

1. From the Home screen, click the **Case** tab.
2. Click the **Workload** tab. The Case Workload appears.
3. Click your name.
4. Click the case ID number link of the case you want to view. The Case Overview screen appears.
5. Click the **Court** link in the menu on the left. The Case Participants screen appears.
6. Click the **Case Legal Actions** link. The Legal Actions search screen appears.
7. Enter the court case number or other criteria in the Search Criteria area and click **Search**. The Legal Actions table displays the actions that meet your criteria.
8. Scroll down and select **Record Complaint** in the **Legal Action** field, then click **Add Action** for a new complaint. Or click the **edit** link next to the complaint you want to update. The Complaint Details screen appears.
9. Complete the fields on this screen. You must complete at least the **Type of Complaint** field to save the record.
10. Click **Add Participant** to identify any participants involved in this action, complete the required fields, then click **Save** to return to the Legal Actions search screen.

Click here to select the type of complaint you are recording.

Click here to identify the case participants in this legal action or complaint.

Case ID: 8016409 Case Status: Open
Case Name: Stone (CM)08, Wilma Case Category: Ongoing

Complaint Details

Court Case Number: Reason for Ending Complaint:

Type of Complaint*

Affiant:

Date Submitted: File Stamp Date:

Action Participants

Action Participant Name	Allegations	Preferred Primary Disposition	Preferred Secondary Disposition
<input type="button" value="Add Participant"/>			

How to record a legal motion

You “record” a legal motion when the motion has already been filed with the court. You can record a stand-alone motion record, or link it to an existing legal action.

1. From the Home screen, click the **Case** tab.
2. Click the **Workload** tab. The Case Workload appears.
3. Click your name.
4. Click the case ID number link of the case you want to view. The Case Overview screen appears.
5. Click the **Court** link in the menu on the left. The Case Participants screen appears.
6. Click the **Case Legal Actions** link. The Legal Actions search screen appears.
7. Enter the court case number or other criteria in the Search Criteria area and click **Search**. The Legal Actions table displays the actions that meet your criteria.
8. Scroll down, select **Record Motion** in the **Legal Action** field, and click **Add Action**. Or click the **edit** link next to the motion record you want to update. The Record Motion Details screen appears.
9. Complete the fields on this screen. You must complete at least the **Type of Motion** and **Method of Motion** fields.
10. Click **Add Participant** to identify any participants involved in this action, complete the required fields, then click **Save** to return to the Legal Actions search screen.

Click here to select the type of motion you are recording.

Click here to select the method by which this motion is being filed.
Enter details describing the intent of this motion.

Click here to add a case participant in this legal action.

Case ID: 15054
Case Name: Moor, Randy
Case Status: N/A
Case Category: Ongoing

Record Motion Details

Motion Filed By: [Search Person](#)

Court Case Number:

Reason for Ending Motion:

Type of Motion*:

Date Submitted:

Method of Motion*:

Sub-Type:

File Stamp Date:

Motion Supported by Affidavit:

Motion Narrative:

[Spell Check](#) [Clear](#)

Action Participant(s)

Action Participant Name	Preferred Primary Disposition	Preferred Secondary Disposition	GAL	CASA
Add Participant				

How to record a subpoena

At times, a member or other party with an open case and court action may be served with a subpoena. A subpoena is always linked in the system to an existing legal action.

1. From the Home screen, click the **Case** tab.
2. Click the **Workload** tab. The Case Workload appears.
3. Click your name.
4. Click the case ID number link of the case you want to view. The Case Overview screen appears.
5. Click the **Court** link in the menu on the left. The Case Participants screen appears.
6. Click the **Case Legal Actions** link. The Legal Actions search screen appears.
7. Enter the court case number or other criteria in the Search Criteria area and click **Search**. The Legal Actions table displays the actions that meet your criteria.
8. Click the **link legal action** link next to the legal action to which this subpoena relates. The detail screen is displayed.
9. Scroll down, select **Record Subpoena** in the **Legal Action** field, and click **Add Action**. The Subpoena Details screen appears.
10. Complete the fields on this screen. You must complete at least the **Subpoena Type** field to save the record.
11. To indicate others associated with the subpoena, click the **associate participants** link in the Action Participants area, select the case participants, and click **OK**.
12. Click **Save**. You are returned to the Legal Actions search screen.

Select the type of subpoena(s) the person received, then click **Add>**. You can select more than one type.

Enter details describing the address or location where the person is required to appear.

Enter details describing why the person was subpoenaed.

Select the response or action from the agency. If you select **Other**, describe the details.

Click this check box if this subpoena record was created in error and you want to invalidate it.

Case ID: 15054
Case Name: Moor, Randy
Case Status: N/A
Case Category: Ongoing

Subpoena Details
Court Case Number: [text field]
Subpoena Type: [dropdown menu]
Add > [button]
< Remove [button]
Subpoenaed Person: [text field]
Person Search [button]
Issuing Court: [text field]
Appearance Location: [text field]

Date Subpoena Served: [calendar icon]
Date Ordered To Appear: [calendar icon]
File Stamped: [calendar icon]
Subpoena Reason: [text area]
Spell check [button] Clear [button]

Agency Response
Agency Response: [dropdown menu]
Response Date: [calendar icon]
Other: [text area]
Spell check [button] Clear [button]

Action Participants
Subpoena Applicable to the Following Participants: [associate participants link]
Action Participant Name | Court ID Number
 Subpoena Record has been Created in Error

How to record court hearing information

When a hearing involving an open case in Ohio SACWIS takes place, you record the results of the hearing.

1. From the Home screen, click the **Case** tab.
2. Click the **Workload** tab. The Case Workload appears.
3. Click your name.
4. Click the case ID number link of the case you want to view. The Case Overview screen appears.
5. Click the **Court** link in the menu on the left. The Case Participants screen appears.
6. Click **Case Legal Actions**. The Legal Actions search screen appears.
7. Enter the court case number or other criteria in the Search

Criteria area and click **Search**. The Legal Actions table displays the actions that meet your criteria.

8. Scroll down, select **Record Hearing** in the **Legal Action** field, and click **Add Action**. The Legal Actions Search screen appears.
9. Select the check box for the legal action to which this hearing applies and click **Continue**.
10. Complete the fields on this screen. You must complete at least the **Hearing Type** field to save the record.
11. To indicate others associated with the hearing, click the **associate participants** link in the Action Participants area, then select the case participants and click **OK**.
12. Click the **Court Information** link at the top of the screen, and complete the fields. Click **Save** to return to the Legal Actions search screen.

The screenshot shows the 'Hearing | Court Information' form. At the top, it displays Case ID: 15054, Case Name: Moor, Randy, Case Status: N/A, and Case Category: Ongoing. The form is divided into sections: 'Hearing Information' with fields for Court Case Number and Last Modified Date; 'Hearing Type: *' with a dropdown menu; a 'Narrative' text area with 'Spell Check' and 'Clear' buttons; 'Hearing Segment(s)' with a table header (Hearing Date, Hearing Time, Created in Error) and an 'Add Hearing Segment' button; 'Action Participants' with a link to 'associate participants' and a table header (Action Participant Name, Court ID Number); and a checkbox for 'Hearing Record has been Created in Error'.

Click here to record additional court information for this hearing. (Callout pointing to the 'Court Information' link)

Select a hearing type here. (Callout pointing to the 'Hearing Type' dropdown)

Click here to add a new segment of this hearing. (Callout pointing to the 'Add Hearing Segment' button)

Click here to indicate others associated with the hearing. (Callout pointing to the 'associate participants' link)

Click this check box if this hearing record was created in error and you want to invalidate it. (Callout pointing to the 'Hearing Record has been Created in Error' checkbox)

How to record a court ruling

You create a ruling record to document the rulings, orders, and dispositions that result from a hearing on an open case. The system generates ticklers based on the rulings recorded.

1. From the Home screen, click the **Case** tab.
2. Click the **Workload** tab. The Case Workload appears.
3. Click your name.
4. Click the case ID number link of the case you want to view. The Case Overview screen appears.
5. Click the **Court** link in the menu on the left. The Case Participants screen appears.
6. Click the **Case Legal Actions** link. The Legal Actions search screen appears.
7. Enter the court case number or other criteria in the Search Criteria area and click **Search**. The Legal Actions table displays the actions that meet your criteria.
8. Scroll down, select **Record Ruling** in the **Legal Action** field, and click **Add Action**. Or click the **edit** link next to the ruling record you want to update. The Ruling Details screen appears.
9. Complete the fields on this screen. You must complete at least the **Action Participant** and **Ruling Type** fields.
10. If the ruling affected the child's legal status, click **Legal Status** and complete the required fields. If it involves a transfer of jurisdiction, click **Associate Jurisdiction Transfer** and complete the required fields.
11. Click **Save** to return to the Legal Actions search screen.

Click here to select the case participant to whom this ruling applies.

Select the ruling(s) the court handed down, then click **Add>>**. You can select more than one ruling.

Click here if the ruling affects a child's legal status.

Click here if the ruling involves a transfer of jurisdiction.

Case ID: 15054
Case Name: Moor, Randy
Case Status: N/A
Case Category: Ongoing

Ruling Information

Action Participant* [Dropdown]
Court Case Number: [Text]
Last Modified Date: [Text]
Date of Ruling: [Text] [Calendar]
Hearing Status: [Dropdown]

Court ID Number: [Text]
Journalized Date: [Text] [Calendar]
Ruling Type* [Dropdown]

Ruling(s) Received: [List: Mapping Default, Active Efforts (ICWA), Adjudicated Abused, Adjudicated Delinquent] [Add >>] [Remove <<]
Selected Rulings Received: [List]

Appeal/Objection to Ruling
 Stay Issued
Appeal Filed On Behalf Of: [Text] [Search Person]

Legal Status Information

Legal Status	Type	Effective Date	Termination Date
[Add Legal Status]			

Jurisdiction Transfer Information

Receiving Court Name	File Stamp Acceptance Date
[Associate Jurisdiction Transfer]	

How to record a notification of a court action

You record a notification when you want to advise participants in the case of a court action.

1. From the Home screen, click the Case tab.
2. Click the Workload tab. The Case Workload appears.
3. Click your name.
4. Click the case ID number link of the case you want to view. The Case Overview screen appears.
5. Click the Court link in the menu on the left. The Case Participants screen appears.
6. Click the Case Legal Actions link. The Legal Actions search screen appears.

7. Enter the court case number or other criteria in the Search Criteria area and click Search. The Legal Actions table displays the actions that meet your criteria.
8. To associate the notification with a legal action record, click the link legal action link for that action. Select Record Notification in the Legal Action field, then click Add Action. The Notification Details screen appears.
To create a notification record that is not associated with a particular legal action record, select Record Notification in the Legal Action field, then click Add Action. The Notification Details screen appears.
9. Complete the fields on this screen. You must complete Notification Type, Notification Status, Person Notified, and Date of Notification.
10. Click Save. You are returned to the Legal Actions screen.

The screenshot shows the 'Notification Details' form with the following callouts:

- Click here to find the case participant who received the notification.** (Points to the 'Person Notified' field)
- Click here to select the type of notification you are recording.** (Points to the 'Notification Type' dropdown)
- Click here to select the status of the notification.** (Points to the 'Notification Status' dropdown)
- Click here to select the date of the notification.** (Points to the 'Date of Notification' field)
- Enter details describing any additional information or comments.** (Points to the 'Notification Details' text area)
- Click here to associate this legal action with applicable case participants.** (Points to the 'Action Participant(s)' field)
- Click this check box if this notification record was created in error and you want to invalidate it.** (Points to the 'Created in Error' checkbox)

The form includes the following fields and controls:

- Case ID: 15054
- Case Name: Moor, Randy
- Case Status: N/A
- Case Category: Ongoing
- Notification Details section:
 - Court Case Number: [text input]
 - Notification Type: [dropdown menu]
 - Notification Status: [dropdown menu]
 - Person Notified: [text input] with Person Search button
 - Date of Notification: [date picker]
 - Notification By: [text input] with Person Search button
 - Notification Details: [text area] with Spell Check and Clear buttons
- Action Participant(s): [text input] with [associate participants] link
- Created in Error: [checkbox]
- Table header: Action Participant Name | Court ID Number

How to record a legal status change associated with a ruling

The method for updating a child's legal status depends on whether the change is the result of a court ruling. If so, the legal status change is made through the ruling record on the case.

1. From the Home screen, click the Case tab.
2. Click the Workload tab. The Case Workload appears.
3. Click your name.
4. Click the case ID number link of the case you want to view. The Case Overview screen appears.
5. Click the Court link in the menu on the left. The Case Participants screen appears.
6. Click the Case Legal Actions link. The Legal Actions search

screen appears.

7. Enter the court case number or other criteria in the Search Criteria area and click Search. The Legal Actions table displays the actions that meet your criteria.
8. Click the edit link for the ruling you are associating with the legal status change. The Ruling Information screen appears.
9. Click Add Legal Status to create a new legal status record. Complete the fields on this screen. You must complete the Type, Legal Status, and Effective Date fields.
10. Click OK.
11. Click Save. You are returned to the Legal Actions search screen.

Click here to display the Case Participants search screen.

Click here to edit the link for the ruling you are associating with the legal status change.

Click here to display the Legal Actions search screen.

Case ID: 15054
Case Name: Moor, Randy

Case Status: N/A
Case Category: Ongoing

[Case Overview](#)

[Activity Log](#)

[Intake List](#)

[Safety Assessment](#)

[Forms/Notices](#)

[Safety Plan](#)

[Family Assessment](#)

[Ongoing Case A/I](#)

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[Case Review/SAR](#)

[Reunification Assessment](#)

[Case Conference Note](#)

[ICPC/ICAMA](#)

[Adoption](#)

[Case Closure](#)

Case Legal Actions

Legal Actions Search Criteria

Legal Action:

Type:

Sub-Type:

Court Case #:

Start Date: End Date:

Sort Results By:

[Search](#) [Clear Form](#)

Legal Actions

		Date	Legal Action	Type	Court Case #	Action Participant(s)	Additional Info
view	link legal action	01/31/2006	Motion	Discovery		William Moor -	Amended
edit							
amend							
report							
view	link legal action	01/31/2006	Motion	Amended Motion		William Moor -	
edit							
amend							
report							
view		01/27/2006	Notification	Hearing	12345	Randy Moor - 12345	
edit							
copy							
view	link legal action	01/27/2006	Motion	Set Addtl Conds in Best Interest of child		Shelly Moore -	
edit							
amend							
report							
view		01/27/2006	Ruling		12345	Randy Moor -	
edit							
view	link legal action	01/26/2006	Complaint	Initial		Randy Moor - 123456	Amended
edit							
amend							
report							

UG 1.6

How to record a legal status change on the person profile

The method for updating a child’s legal status depends on whether the legal status is the result of a court ruling. If not, the legal status change is recorded on the child’s person profile.

1. Display the Person Profile screen for the child.
(For information about how to access the Person Profile screen, see page 4-3.)
2. Click the Legal link at the top of the screen. SACWIS displays the Child Legal Status History screen.
3. If a previous legal status record must be terminated, click the edit link for that record to display the Child Legal

Status Details screen, complete the Termination Date field, and click Save. You are returned to the Child Legal Status History screen.

4. Click Add Legal Status. The Child Legal Status Details screen appears.
5. Complete the fields on this screen. You must complete the Type, Legal Status, and Effective Date fields.
6. Click Save. You are returned to the Child Legal Status History screen.

Click here to select the type. Select Child if the agency does not have legal custody. Select Agency if the agency has legal custody.
Enter the date this legal status is effective here.

Click here to select the child’s legal status when a new legal status record is being created from the ruling information.

The screenshot shows the 'Child Legal Status Details' form in the Ohio SACWIS system. At the top, there is a navigation bar with links for 'home', 'search', 'help & training', 'switch profiles', and 'log off'. Below this, the user is logged in as 'Weaver, Sam [Franklin County Children Services Board]'. The form displays the following information:

- Name: Stone (AD)01, Sandy
- Person ID: 1032121
- SSN: 186-01-9699
- DOB: 02/22/2002

The 'Child Legal Status Details' section contains the following fields:

- Type:** A dropdown menu with a downward arrow.
- Legal Status:** A dropdown menu with a downward arrow.
- Initial Agency Custody Episode:** A dropdown menu with 'No' selected.
- Effective Date:** A date input field with a calendar icon.
- Effective Time:** A time input field with a dropdown arrow.
- Expiration Date:** A date input field with a calendar icon.
- Termination Date:** A date input field with a calendar icon.
- If Terminated, Reason:** A dropdown menu.
- Custody Episode Terminated?:** A dropdown menu.
- Narrative:** A large text area with a scroll bar.

At the bottom of the form, there are 'Spell Check' and 'Clear' buttons, a checkbox for 'Created in Error', and 'Save' and 'Cancel' buttons.

How to view or print a court calendar

The hearing dates entered in Ohio SACWIS populate your court calendar in the system. As a caseworker, you can print the court calendar to help manage court activities for your individual workloads. As a supervisor, you can view or print the court calendars of your staff.

1. From the Home screen, click the Case tab.
2. Click the Court Calendar tab. The Court Calendar Search Criteria screen appears.
3. If you are a supervisor, select in the Case Worker field the name of the worker whose calendar you want to view. If you are a worker, your name appears in this field.
4. In the Hearing Start Date and Hearing End Date fields, enter

the hearing date range you want to report in your calendar. You can further narrow the calendar parameters to a particular hearing type, court case, or court type.

5. Click Search. The cases that meet your search criteria appear in the search results table.
6. Click Generate Report. The court calendar is printed on your local network printer.

The screenshot shows the 'Court Calendar Search Criteria' screen in the Ohio SACWIS system. The interface includes a navigation bar with tabs for Home, Intake, Case, Provider, Financial, and Administration. Under the 'Case' tab, there are sub-tabs for Workload, Court Calendar, and Placement Requests. The 'Court Calendar' sub-tab is active, showing a search form with fields for Case Worker, Hearing Start Date, Hearing End Date, Hearing Time, Court Case Number, Case Name, Hearing Type, and Court Type. A 'Search' button is located below the form. Below the search form, there is a table titled 'Court Calendar Search Results' with columns for Case Worker, Date of Hearing, Time of Hearing, Case Name, Hearing Type, and Court Name. The table shows three rows of results, each with a 'view' link. A 'Generate Report' button is located at the bottom of the screen. Annotations with arrows point to various elements: 'Click here to display the Case Workload screen.' points to the 'Case' tab; 'Click here to display the Court Calendar Search Criteria screen.' points to the 'Court Calendar' sub-tab; 'Click here to select the hearing start and end dates you want to report in your calendar.' points to the 'Hearing Start Date' and 'Hearing End Date' fields; 'Click here to initiate the search.' points to the 'Search' button; 'Click here to view details of the cases that meet your search criteria.' points to the 'view' links in the results table; and 'Click here to print your court calendar to a local network printer.' points to the 'Generate Report' button.

How to print a VAC report

A Voluntary Agreement for Care (VAC) is created and implemented when the parents, guardians, or custodians are unable to care for the child and agree to give custody voluntarily to the PCSA for a period of time that's less than 90 days. This agreement, and change in legal status, is recorded on the child's person profile.

1. Display the Person Profile screen for the child.
(For information about how to access the Person Profile screen, see page 4-3.)
2. Click the **Legal** link above the row of tabs. The Child Legal Status History screen appears.
3. Select **1645 Voluntary Agreement for Care** in the Reports

field.

4. Click **Report**. The Document Details screen appears.
5. Click **Generate Report**. Complete the fields on the screen, including detailed explanations in the narrative fields.
6. Complete the report parameters.
7. Click **Generate Report**. The report is displayed in a PDF.
8. Click **Save** in the lower-left corner of the screen to save this report to the document history in Ohio SACWIS.
9. Click the printer symbol on the toolbar, or select **File**, then **Print**. The report is printed on your local network printer.

Click here to select the **1645 Voluntary Agreement for Care** report.

Search > Person Search

Profile | Education | Medical | Employment/Assets | Military | **Legal** | Delinquency | SACWIS History

Legal Status Legal Actions

Case ID: 10248 Name: Moor, Randy Category: Ongoing Services Status: Open

Child Legal Status History

	Effective Date	Date Terminated	Type	Legal Status	Created in Error
edit ruling	01/05/2005		Agency	Temporary Custody to Agency	
edit ruling	12/13/2004	01/05/2005	Agency	Protective Supervision	Yes
edit ruling	11/12/2004	12/13/2004	Child	Temporary Custody to Relative	
edit ruling	10/13/2004	11/12/2004	Agency	Voluntary Agreement for Care	

[Add Legal Status](#)

Reports

Reports: 1645 - Voluntary Agreement for Care [Report](#)

Click here to display the **Child Legal Status History** screen.

Click here to generate a report.

Chapter 9

Provider Management

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Provider Management

Ohio SACWIS is used for managing information about any providers used by agencies throughout the state. These include home providers licensed by ODJFS as well as other, non-ODJFS providers. This area of the system is also used to manage information for each PCSA, PNA, and PCPA operating in the state.

Displaying provider information

As an Ohio SACWIS user, you view information about active providers from the universal search feature, accessed from the search header link. An active provider is one whose services are activated in the system. This provider search function displays view-only, basic provider information.

If you are a provider worker, you conduct your queries and manage provider information from the **Provider** tab. This tab displays your workload, which contains the providers to whom you are assigned. The workload leads you to the details of particular provider records, while the tabs allow you to perform other provider management activities, in accordance with your access rights.

Adding provider information

The method for adding provider information varies according to the type of provider: ODJFS or home providers, and non-ODJFS providers.

Home providers (ODJFS providers) are added to the system by way of an inquiry and initial application. You collect basic information about the potential provider on the inquiry record, based on what is provided on the application. Once the application is accepted, the inquiry is completed and a provider record is created. A home study record can be created and the process begun. When the home study is complete and the provider is certified, the provider record is activated and included when the system runs a provider

match. Subsequent updates to the provider record are made through the home study record.

Other, non-ODJFS providers are added to the system by way of the provider directory. This is where you record relevant details about the provider and services.

Provider Types

A single provider record may have multiple types, and each type has its own status. For example, you record one provider record for a hospital, then create provider type records for the pharmacy, clinic, and so on, each with associated services.

This chapter explains:

- How to find a provider
- How to view provider details
- How to match a provider service with a client
- How to record basic information for non-ODJFS providers
- How to record basic information for ODJFS providers
- How to view a provider inquiry
- How to create or update the inquiry record
- How to link an inquiry to a provider record
- How to view a home study
- How to record a home study
- How to record a home description
- How to record a description of family
- How to record the disposition of a home study
- How to record a recommendation for certification
- How to record child acceptance characteristics
- How to record placement criteria
- How to record service credentials
- How to record training session information
- How to record a provider's service contract
- How to record a recruitment plan and event

How to find a provider

There are two ways to find a provider, depending on whether or not you are assigned to a provider and have full access rights to the record. If you are assigned to a provider, you can display the provider overview from your provider workload.

1. From the Home screen, click the **Provider** tab.
2. Click the **Workload** tab and display your workload. The providers assigned to you appear in a table.
3. Click the **select** link next to the Provider ID. The Provider Overview screen appears.
4. Click the **Provider Information** link in the Provider Actions area to view or update the provider's name, address, members, caregivers, or capacity information. Or, click any

one of the links in the menu on the left to view or update information related to this provider.

If you are not assigned to the provider, you can display basic provider information using the universal search feature as shown in the screen below:

1. Click the **search** header link. The Ohio SACWIS Search screen appears.
2. Select **Provider Search**. The Provider Search screen appears.
3. Enter search criteria and click **Search**. The providers that meet your criteria appear in the Provider Profile Search Results.
4. Click the **view** link next to the provider's name to see the provider information.

The screenshot shows the Ohio SACWIS web application interface. At the top, there is a navigation bar with tabs for Home, Intake, Case, Provider, Financial, and Administration. Below this is a sub-menu with Workload, Directory, Recruitment, Inquiry, Training, Contracts, and Agency Certifications. The main content area is titled "Provider Search" and "Provider Match". It contains a form for "Provider Profile Search Criteria" with fields for Provider Name, Provider Type, Agency Type, Provider ID, Provider Category, Agency, and OR. There is also a link for "Advanced Search Criteria" and buttons for "Search" and "Clear Form".

Callout boxes provide instructions:

- Click here to select Provider Search.** (Points to the "search" link in the top navigation bar)
- Click here to begin your search.** (Points to the "Provider Search" link in the sub-menu)
- Enter the search criteria here.** (Points to the "Provider Name" input field)
- Enter the Provider ID number if you have it for the quickest way to complete the search.** (Points to the "Provider ID" input field)
- Click here if you wish to use an address as part of your search criteria.** (Points to the "Advanced Search Criteria" link)
- Click this button to initiate the search.** (Points to the "Search" button)

How to view provider details

From the Provider Overview screen, you can view comprehensive information about the providers to whom you are assigned. In addition to the provider's name, address, and status, you can view a family listing narrative, activity log, training, acceptance criteria, approvals or certifications, and so on.

1. From the Home screen, click the **Provider** tab.
2. Click the **Workload** tab and display your workload. The providers assigned to you appear in a table.
3. Click the **select** link next to the Provider ID. The Provider Overview screen appears.
4. Click the **Provider Information** link in the Provider Actions

area for details about the provider. The **Basic** tab is displayed.

5. View information in other tabs, including **Address**, **Members**, **Caregivers**, and **Capacity** information for the selected provider.
6. Click **Cancel** to return to the Overview screen.
7. Click the links in the menu on the left to view other records entered on behalf of this provider.
8. Click **Save** to return to the Overview screen.

Click each of the links below to view or record different types of provider information.

Click here to view details about a specific provider, including histories of the provider's name, address, contacts, members, caregivers, and capacity information.

Provider Overview

Provider Name: McCormick, Judy null & McCormick, Randy null Provider Status: Active
 Primary Address: 123 Vine Primary Contact: Home Phone: 740-368-0000
 Delaware, OH 43015
 Delaware

Tickler Summary
 No Ticklers Available.

Approval/Certification Information

Provider Type	Status	Approval/Certification Period	Agency
Adoptive Care	Application Received		Adams County Children Services Board
Foster Care	Pending Certification		Adams County Children Services Board

Provider Assignment Information [View Assignment History](#)

Worker Name	Effective Date	Role	Agency
Miller, Duncan	12/28/2005		Adams County Children Services Board
James, Ernest	01/19/2006		Adams County Children Services Board

Family Listing Narrative:
 Updated as of:

How to match a provider service with a client

When a client or family is in need of services, the provider match feature allows you to find providers who can meet the client's needs. The system matches only providers who are properly credentialed.

1. From the Home screen, click the **Provider** tab.
2. Click the **Directory** tab. The Provider Profile Search Criteria screen appears.
3. Click the **Provider Match** tab. The Provider Match screen appears.
4. Enter the provider criteria. You must complete at least the **Service Category** and **Service Type** fields. Click **Additional**

Search Criteria if you want to narrow your search to a particular provider.

5. Enter the child's criteria. Click **Additional Search Criteria** to include child characteristics in your criteria.
6. Click **Search**. A list of providers who meet your search criteria appear in the Search Results list below.
7. Click the select link next to the name of the provider you want to choose.

The screenshot shows the 'Provider Match Search Criteria' form within the 'Provider' tab of the system. The form is divided into several sections:

- Provider Information:** Includes fields for 'Service Category' (dropdown), 'Service Type' (dropdown), 'Agency Type' (dropdown), and 'Agency' (dropdown).
- By Available Capacity:** A checkbox is checked. Below it are 'Available Counties' (list box) and 'Selected and Nearby Counties' (list box). Buttons for 'Add >>' and '<< Remove' are present.
- Child Information:** Includes fields for 'Gender' (dropdown), 'From Age' (text), 'To Age' (text), and 'Language' (dropdown).
- Additional Search Criteria:** Two expandable sections for adding more criteria.
- Sort Results By:** A dropdown menu.
- Buttons:** 'Search' and 'Clear Form' buttons at the bottom.

Callouts point to specific elements:

- 'Click here to search for providers.' points to the 'Directory' tab.
- 'Click here to match a provider service with a client.' points to the 'Provider Match' tab.
- 'Click here to display the Provider Search screen.' points to the 'Provider Search' tab.
- 'Enter the provider criteria here.' points to the 'Service Category' field.
- 'Click here if you want to narrow your search to a particular provider.' points to the 'Agency' field.
- 'Enter the child's criteria here.' points to the 'Child Information' section.
- 'Click here if you want to include child characteristics in your criteria.' points to the 'Additional Search Criteria' sections.
- 'Select the method by which you want to display the search results.' points to the 'Sort Results By' dropdown.
- 'Click this button to initiate the search.' points to the 'Search' button.

How to record basic information for non-ODJFS providers

The basic details of a provider record include the provider's name, type, status, address, members, caregivers, and capacity information. You display this information from the Provider Information link in the Provider Actions area of the Provider Overview screen. For non-ODJFS providers, you create their records from the Provider Directory screen, then update the information from the Provider Overview screen.

1. From the Home screen, click the **Provider** tab.
2. Click the **Directory** tab. The Provider Profile Search Criteria screen appears. The system always requires you to conduct a search before adding a provider, to prevent

any duplicated records.

3. Enter the search criteria. Click the **Advanced Search Criteria** link if you want to search by the provider address.
4. Click **Search**. The providers who meet your criteria appear in the Provider Profile Search Results.
5. Click the **edit** link for the provider record you want to update. Or, if the provider is not in the table, click **Add Non-ODJFS Provider**. The Provider Information screen appears.
6. You must enter at least a provider name, provider type, an address, and contact information.
7. Click **Apply** to return to the Provider Information screen.

The screenshot shows the 'Provider Information' screen for a 'Non-ODJFS' provider. The screen is divided into several sections, each with a corresponding 'Add' button and a callout explaining its function:

- Provider Name Information:** Includes a table with columns 'Provider Name', 'Effective Date', and 'End Date'. A callout points to the 'Add Name' button: "Click here to add a new provider name."
- Provider Type Information:** Includes a table with columns 'Provider Type', 'Agency', 'Type Effective Date', 'Type End Date', and 'Type Status'. A callout points to the 'Add Type' button: "Click here to add a new provider type."
- Provider Status Information:** Includes a table with columns 'Provider Status', 'Reason', 'Status Effective Date', and 'Review Date'. A callout points to the 'Add Status' button: "Click here to add a new provider status." A link 'View Status History' is also present. A callout points to this link: "Click here to view a history of provider status details."
- Provider Reference Information:** Includes a table with columns 'Reference Type', 'Reference Number', and 'Description'. A callout points to the 'Add Reference' button: "Click here to add a reference ID number."

At the top of the screen, there are tabs for 'Basic', 'Address', 'Members', 'Caregivers', and 'Capacity'. Callouts point to these tabs with the following instructions:

- Address tab: "Click here to enter or view a provider's address or contact information."
- Members tab: "Click here to enter or view member details and histories."
- Capacity tab: "Click here to enter or view capacity information."

At the bottom of the screen, there are three buttons: 'Apply', 'Save', and 'Cancel'.

How to record basic information for ODJFS providers

To update details for a home provider, or ODJFS provider, you access them from the most current home study record.

1. From the Home screen, click the **Provider** tab.
2. Click the **Workload** tab and display your workload. The providers assigned to you appear in a table.
3. Click the select link for the provider record you want to update. The Provider Overview screen appears.
4. Click the **Home Study** link in the menu on the left. The Maintain Home Study History screen appears.
5. Click the **edit** link for the most recent home study record in

“Pending” status, or click the **amend** link next to the most recent initial home study record in “Approved” status. The Home Study Details screen appears.

6. Complete the fields and click **Save**. The Maintain Home Study Information screen appears.
7. Click the **Basic Provider Information** link, which is at the top of the list in the Topic column. The **Basic** tab of the Provider Name Information screen appears.
8. Record the provider name, type, and so on.
9. Click **Save** to return to the Maintain Home Study Information screen.
10. Click **Validate for Approval** or **Close** to return to the previous screen.

Click here to record basic provider information for an ODJFS provider.

Click here to validate this information before submitting it to your supervisor for approval.

Provider Category:	Home	Provider ID:	32320	Provider Name:	McCormick,Judy null&McCormick,Randy null
- Maintain Home Study Information					
Agency:	Adams County Children Services Board	Home Study Type:	Initial		
Start Date:	01/10/2006	Priority:			
Provider Type:	Adoptive Care				
Level of Care:		Assessor:	Hatcher, Teri		
Home Study Topics					
Topic			Status		
Basic Provider Information (Name, Household Members, Address and Contact, Caregiver)					
Verifications			Not Completed		
Safety Audit			Disposition Status Has Been Not Entered		
References			No References Provided		
Description of Home			Record Exists		
Description of Family			Record Exists		
Assessment Visits			No Visits Linked		
Training Completed			Training Requirements Not Completed		
Acceptance Criteria Information			Characteristics Information - Not Available / Usage Placement Criteria - Not Available		
Disposition			Pending		
<input type="button" value="Validate for Approval"/>					

How to view a provider inquiry

An inquiry is created when an individual initiates contact with a PCSA, PCPA, or PNA representative. Contacts may be made in person, in writing, or by phone. If you work at a public agency, you can view the inquiries of any agency. If you work at a private agency, Ohio SACWIS allows you to view the inquiries made to your own agency.

1. From the Home screen, click the **Provider** tab.
2. Click the **Inquiry** tab. The Inquiry Search Criteria screen appears.
3. Enter the search criteria. You must include the agency as part of your criteria.
4. Click **Search**. The inquiry records that match your criteria

appear in the Inquiry Search Results list.

5. Click the **view** link next to the inquiry you want to view. The Inquiry Details screen appears, displaying the **Members** tab first. This tab also lists any children about whom the potential provider inquired.
6. Click the **Address, Referral Sources, Optional Info, and Activity/Decision** tabs to view additional details.
7. Click **Close** to return to the Inquiry Search Criteria screen.

Enter the inquiry criteria here. Be sure to select an agency.

Select the method by which you want to display search results.

Inquiry Search Completed Inquiries

Inquiry Search Criteria

Agency: * Franklin County Children Services Board

Last Name: Sounds Like
[HINT: Wildcard (%) search & 'Sounds Like' cannot be used together.]

Middle Name:

First Name:

Street Number: Sounds Like
[HINT: Applies to street name/city only.]

Street Name:

City: State: Zip Code

Inquiry Type: Inquiry ID:

From Inquiry Date: To Inquiry Date:

Decision:

Sort Results By:

Search **Clear Form**

Click this button to initiate the search.

How to create or update the inquiry record

An inquiry record is maintained for an inquiry an applicant makes to your agency about providing home care. You can make updates to an inquiry made to your own agency until the application is completed and the inquiry decision is recorded. Ohio SACWIS manages provider inquiries statewide. Therefore, you should make sure an inquiry does not already exist before you create a new one.

1. From the Home screen, click the **Provider** tab.
2. Click the **Inquiry** tab. The Inquiry Search Criteria screen appears.
3. Enter the search criteria. You must include the agency as

part of your criteria.

4. Click **Search**. The inquiry records that match your criteria appear in the Inquiry Search Results.
5. Click the **edit** link for the inquiry you want to update. Or click **Add Inquiry** to create a new inquiry record. The Inquiry Details screen appears.
6. Complete the fields at the top of the **Members** tab. If you select one of the following values in the **Inquiry Type** field, a home provider record is not initiated in the system: Adoption-Out of State, Foster-Out of State, Kinship-Out of State, Other.
7. Click **Apply** to save the information and return to the previous screen.

The screenshot shows the 'Inquiry Details' screen with the 'Members' tab selected. The screen is divided into several sections: 'Members', 'Address', 'Referral Sources', 'Optional Info', and 'Activity/Decision'. The 'Members' section contains a 'Member List' table with columns for Name, Gender, DOB, Age, and Role, and an 'Add Member' button. Below this is a 'Specific Children of Interest' section with a table for Name and Relationship, and an 'Add Child' button. The 'Optional Info' section includes fields for 'Agency' (Franklin County Children Services Board), 'Inquiry Received By' (dropdown), 'Inquiry Type' (dropdown), 'Inquiry Date' (12/26/2006), and 'Description'. Annotations with arrows point to the 'Add Member' and 'Add Child' buttons, and to the 'Inquiry Type' and 'Inquiry Date' fields.

Click here to enter or view an inquirer's current mailing address.

Click here to enter or view referral sources for an inquirer.

Click here to enter or view details of an inquirer's interest in caring for or adopting a child.

Click here to enter or view follow-up activities for an inquirer.

Click here to add details regarding a new member of a household or staff who has inquired about becoming a provider.

Click here to add details for a new child about whom the potential provider is inquiring.

How to link an inquiry to a provider record

Once a decision has been recorded and the inquiry record is completed, you link the inquiry to an existing or new home provider record.

1. From the Home screen, click the **Provider** tab.
2. Click the **Inquiry** tab. The Inquiry Search screen appears.
3. Click the **Completed Inquiries** tab. A list of completed inquiry records that are ready to be assigned appears. This list displays inquiries on which a decision was recorded.

4. Click **link** next to the inquiry record to connect this inquiry to an existing provider record. The system matches the person in the Inquirer 1 role to any provider record in which that person is a member.

Click here to view a list of completed inquiry records.

Click here to search for completed inquiries.

Click here to connect this inquiry to an existing provider record.

Home Intake Case Provider Financial Administration									
Workload Directory Recruitment Inquiry Training Contracts Agency Certifications									
Inquiry Search					Completed Inquiries				
Assignment									
		Family Name	Inquiry Date	Inquiry Type	Address	Decision	Agency		
view	link	Linkhorn, Pat	12/01/2005	Foster Care	897 Anson Columbus OH	Screen In - Application Received	Adams County Children Services Board		
view	link	Moor, Mickey	01/09/2006	Foster Care	435 Fisher Columbus OH	Screen In - Application Received	Adams County Children Services Board		

How to view a home study

Through the home study process, a provider completes the necessary steps to become approved or certified by the agency. More than one home study may be recorded for a provider, depending on the circumstances. You can view or update the home studies of the providers to whom you are assigned.

1. From the Home screen, click the **Provider** tab.
2. Click the **Workload** tab and display your workload. The providers assigned to you appear in a table.
3. Click the **select** link next to the Provider ID. The Provider Overview screen appears.
4. Click the **Home Study** link in the menu on the left. The Maintain Home Study History screen appears.
5. Click the **view** link for the home study record you want to view. The Maintain Home Study Information screen appears. It lists a series of home study components, or topics, and their status, including home study verifications and references.
6. Click on a home study topic link to view details of that topic, then click **Close** to return to the Maintain Home Study Information screen.
7. Click **Disposition** to view the results of the home study.
8. Click **Cancel** to return to the Maintain Home Study Information screen.
9. Click **Close** to return to the Provider Overview screen.

Click on each link to view details of home study topics.

Provider Category:	Home	Provider ID:	32320	Provider Name:	McCormick,Judy null&McCormick,Randy null
- Maintain Home Study Information -					
Agency:	Adams County Children Services Board	Home Study Type:	Initial		
Start Date:	12/28/2005	Priority:			
Provider Type:	Foster Care				
Level of Care:	Family Foster Home	Assessor:	Miller, Duncan		
Home Study Topics					
		Topic	Status		
Basic Provider Information (Name, Household Members, Address and Contact, Caregiver)					
Verifications		Completed			
Safety Audit		Disposition Status Has Been Entered			
References		3 of References Provided			
Description of Home		Linked			
Description of Family		Linked			
Assessment Visits		3 of Visits Linked			
Training Completed		Training Requirements Completed			
Acceptance Criteria Information		Characteristics Information - Linked / Usage Placement Criteria - Linked			
Disposition		Pending			

How to record a home study

Through the home study process, a provider completes tasks to become approved or certified by an agency. You must complete the home study within six months of the date the application was screened in. Home study types include:

- **Initial.** The record that initiated the provider’s approval for the provider type and level of care.
- **Amended.** The record created to reflect new information added after the initial home study was approved.
- **Updated.** The record created during recertification.

1. From the Home screen, click the **Provider** tab.
2. Click the **Workload** tab and display your workload. The providers assigned to you appear in a table.

3. Click the **select** link for the provider record you want to update. The Provider Overview screen appears.
4. Click the **Home Study** link in the menu on the left. The Maintain Home Study History screen appears.
5. Click **Add Initial Home Study**. The Home Study Details screen appears.
6. Complete the enabled fields and click **Save**. The Maintain Home Study Information screen appears.
7. Click each of the links in the Home Study Topics area (refer to the previous page). Complete the required fields and click **Save**.
8. Click **Validate for Approval** on Maintain Home Study Information screen before submitting it for approval, or click **Close** to return to the Home Study History screen.

Click here to record a home study.

The screenshot shows the 'Provider' tab selected in the top navigation bar. The 'Workload' sub-tab is active, displaying a table of providers. The provider 'McCormick, Judy null & McCormick, Randy null' is selected. The left-hand menu has 'Home Study' highlighted. The main content area shows the 'Maintain Home Study History' table with two rows of data. Below the table is a blue button labeled 'Add Initial Home Study' and a 'Close' button.

Provider Type	Home Study Type	Start Date	Status	Disposition	Disposition Date	Agency
Foster Care	Initial	12/28/2005	Approved	Pending	12/28/2005	Adams County Children Services Board
Adoptive Care	Initial	01/10/2006		Pending	01/10/2006	Adams County Children Services Board

Click here to add the details of an initial home study.

How to record a home description

A home description summarizes the home's sleeping arrangements, the family's living conditions, the neighborhood, the nearby schools, and the family's access to transportation. While it's a required portion of a home study, you can record a home description outside of a home study.

1. From the Maintain Home Study Information screen, click the **Description of Home** link. The Description of Home Information screen appears.

For information about how to display the Maintain Home Study Information screen, see "How to record a home study" on page 9-12.

2. Click **Maintain Description of Home**. The Maintain

Description of Home screen appears.

3. Click **Add Home Description**. The Description of Home Details screen appears.
4. Complete the fields on this screen. You must complete the **Effective Date** field.
5. Click **Add Sleeping Arrangement**, and then complete the fields on the Sleeping Arrangement Details screen.
6. Click **OK** to return to the Maintain Home Information screen.
7. Click **Living Conditions**, **Outdoor/Neighborhood**, **School Info**, and **Transportation** tabs; complete the fields on these screens; and click **Save**. You are returned to the Home Study Information or Provider Overview screen.

The screenshot shows the 'Maintain Description of Home' screen with several callouts:

- Click here to view or describe the living conditions in the home.** Points to the **Living Conditions** tab.
- Click here to view or describe the provider's neighborhood and area outside the home.** Points to the **Outdoor / Neighborhood** tab.
- Click here to view or identify the schools the placed child will attend.** Points to the **School Info** tab.
- Click here to view or describe the provider's access to transportation.** Points to the **Transportation** tab.
- Enter the date on which this review was conducted.** Points to the **Effective Date** field.
- Click here to record details about sleeping arrangements.** Points to the **Add Sleeping Arrangement** button.

The screen displays the following information:

- Home Info** tab selected.
- Provider Category: Home
- Provider ID: 32320
- Provider Name: McCormick, Judy null&McCormick,Randy null
- Maintain Home Information: Description of Home is Applicable to the Following Primary Address of the Provider: 123 Vine STS Delaware, OH 43015
- Effective Date: 02/13/2006
- Number of Bedrooms: [Empty field]
- Approved Fire Inspected Floors for Sleeping Arrangements: First, Second, Third, Attic, Basement
- Sleeping Arrangements table:

Bedroom	Floor/Level	Occupants	Bed Type	Child will Occupy Bed
Approved Number of Beds:		0	Approved Number of Cribs:	
			0	0

Add Sleeping Arrangement button

How to record a description of family

The description of family includes a series of narratives that describe the applicant(s), other household members, and the overall support and situation of the family.

1. From the Maintain Home Study Information screen, click the **Description of Family** link. The Description of Family Information screen appears.
For information about how to display the Maintain Home Study Information screen, see "How to record a home study" on page 9-12.
2. Click **Maintain Description of Family**. The Maintain Description of Family screen appears.
3. Click **Add Family Description**. The Description of Family

Details screen appears. Complete the fields on this screen and click **Save**. The Applicant Narratives screen appears.

4. Click the **edit** link next to a statement. The Narrative Details screen appears. In the narrative field, enter a detailed response to the statement and click **Save**. You are returned to the Applicant Narratives tab.
5. Repeat step 4 for each statement.
6. Click **Member Narratives** and **Family Narratives**, complete the required fields on each screen, and click **Save**.
7. Click **Close**. You are returned to the Maintain Home Study Information screen.

Click here to display the provider Workload screen.

Enter the date on which this review was conducted.

Click here to record narratives concerning the persons who are applying to become providers.

Click here to record narratives concerning the provider's household members.

Click here to record narratives concerning the provider's family members.

How to record a recommendation for certification

A recommendation record is created when a supervisor approves a home study. You, as the home study assessor, then complete the recommendation record and submit it to the agency or ODJFS reviewer. The reviewer responds to your recommendation and indicates whether the provider will be certified.

1. From the Home screen, click the **Provider** tab.
2. Click the **Workload** tab and display your workload. The providers assigned to you appear in a table.
3. Click the **select** link for the provider whose recommendation you want to record. The Provider

Overview screen appears.

4. Click the **Approval/Certification** link in the menu on the left. The Maintain Approval/Certification Recommendations list screen appears. It lists the transaction records associated with the provider's approval or certification.
5. Click the **edit** link to complete an existing recommendation record or click **Add Recommendation** to record a new recommendation. The Maintain Transactions screen appears.
6. Complete the fields on the screen. You must complete at least these fields: **Agency Contact Person**, **Provider Type**, **Transaction**, **Recommendation Date**.
7. Click **Process Approval**. The record is sent to the agency or ODJFS reviewer who makes the final decision.

The screenshot shows the 'Maintain Transactions' form for provider 'Abel, Linda & Abraham, Joseph' (ID: 32921). The form is divided into sections: 'Administrative Rules' and 'Decision'. The 'Decision' section contains the following fields and options:

- Agency:** Adams County Children Services Board
- Agency Contact Person:** (Dropdown menu)
- Provider Type:** (Dropdown menu)
- Level of Care:** (Dropdown menu)
- Recommendation Date:** (Date picker)
- Change Transaction Information:**
 - Name Change
 - Level of Care Change
 - Marital Status Change
 - Relocation
- Close Transaction Information:**
 - Closed Reason:** (Dropdown menu)
 - If Other, Explain:** (Text area)
- Transfer Transaction Information:**
 - Receiving Agency:** (Dropdown menu)
 - Receiving Agency Contact Person:** (Text field)
- Comments:** (Text area)

Callout boxes provide the following instructions:

- Click here to record waivers, variances, or rule violations linked to this recommendation, or to deny or revoke a certificate to board children.** (Points to the 'Administrative Rules' tab)
- Click here to record a response to the assessor's recommendation.** (Points to the 'Agency Contact Person' dropdown)
- Select the worker who should be contacted about this recommendation.** (Points to the 'Agency Contact Person' dropdown)
- Select the type of provider here.** (Points to the 'Provider Type' dropdown)
- Select the type of recommendation or other transaction here.** (Points to the 'Transaction' dropdown)
- Select a check box to identify information that has changed. You may select more than one check box.** (Points to the 'Change Transaction Information' checkboxes)
- Enter the date of this recommendation.** (Points to the 'Recommendation Date' field)
- Click here to submit this recommendation to your supervisor for approval.** (Points to the 'Process Approval' button)

How to record child acceptance characteristics

The provider identifies the age, number, and characteristics of the children he or she is able to accept. This information is collected during the provider's initial inquiry, then maintained thereafter and approved.

1. From the Home screen, click the **Provider** tab.
2. Click the **Workload** tab and display your workload. The providers assigned to you appear in a table.
3. Click the select link next to the ID of the provider whose record you want to update. The Provider Overview screen appears.
4. Click the **Acceptance Criteria** link in the menu on the left.

The Acceptance Characteristics list screen appears.

5. Click the **edit** link next to the provider type record you want to update, or click **Add Characteristics** to add criteria.
6. If this is a new record, select values in the **Provider Type** and **Characteristics Status** fields.
7. If these characteristics are in effect during a certain time period, enter the dates in **Effective Date** and **End Date** fields.
8. Select a category of characteristic in the **Select Group** field and click **Show**.
9. Click the radio button next to the provider's preference.
10. Repeat steps 8 and 9 for each group.
11. Click **Save** to return to the previous screen.

Select values in **Provider Type** and **Characteristics Status** fields.

Enter **Effective** and **End Dates** if characteristics are in effect for a certain period.

Select a category of characteristic, and then click **Show**.

Group	Description	Select All : <input type="radio"/> Unknown
Dental Problems	Crowded/Missing Teeth	<input type="radio"/> Willing to Consider <input type="radio"/> Unwilling To Consider <input type="radio"/> Unknown
Dental Problems	Missing Permanent Teeth	<input type="radio"/> Willing to Consider <input type="radio"/> Unwilling To Consider <input type="radio"/> Unknown
Dental Problems	Orthodontic Problems	<input type="radio"/> Willing to Consider <input type="radio"/> Unwilling To Consider <input type="radio"/> Unknown
Dental Problems	Other	<input type="radio"/> Willing to Consider <input type="radio"/> Unwilling To Consider <input type="radio"/> Unknown

Click the radio button indicating the provider's preference. Do this for each group.

How to record placement criteria

The provider identifies the age, number, and characteristics of the children he or she is able to accept. For a home or residential provider, the placement criteria record is approved as part of the home study or licensing process. A placement criteria record cannot be approved until a characteristics criteria record has been added.

1. From the Home screen, click the **Provider** tab.
2. Click the **Workload** tab and display your workload. The providers assigned to you appear in a table.
3. Click the **select** link next to the ID of the provider whose record you want to update. The Provider Overview screen appears.

4. Click the **Acceptance Criteria** link in the menu on the left. The Acceptance Characteristics list screen appears.
5. Click the **Usage Placement Criteria** tab. The Usage Placement Criteria screen appears.
6. Click the **edit** link next to the provider type record you want to update, or click **Add Criteria** to add a new placement record.
7. If this is a new record, select values in the **Provider Type** and **Placement Criteria Status** fields.
8. To update an existing criteria record, click the **edit** link, or click **Add** to create a new criteria record. Complete all fields on this screen and click **OK**.
9. Repeat step 8 for each group and click **Save**.

Select the provider type

Click here to add a new placement record.

Provider Category: HOME Provider ID: 8032164 Provider Name: Black,Betzy08

Criteria

Provider Type: * Placement Criteria Status: LINKEDTOCOMPLETEDHOMESTUDY

Effective Date: 03/03/2006 End Date:

	Gender	Minimum Age	Maximum Age	Number of Children	
edit	MALE	0Years, 0Months	18Years, 0Months	1	delete
edit	FEMALE	0Years, 0Months	18Years, 0Months	1	delete

How to record service credentials

Services offered by non-ODJFS providers are recorded as “other” services. Additionally, a home provider may be qualified to provide additional services not licensed through ODJFS (for example, tutoring or first aid classes). These are also recorded as “other” services.

1. From the Home screen, click the **Provider** tab.
2. Click the **Workload** tab and display your workload. The providers assigned to you appear in a table.
3. Click the **select** link next to the ID of the provider whose details you want to view. The **Provider Overview** screen appears.
4. Click the **Service Credentials** link in the menu on the left.

The **Maintain Payment Information** screen appears.

5. Click the **Other Services** tab. The **Other Services** screen appears.
6. Click **Add Other Service**. The **Other Services Details** screen appears.
7. Complete the fields on this screen.
8. Click **Save**. You are returned to the **Other Services** screen.

Complete the fields on this screen, in the order in which they appear on the screen.

Provider Category: Home Provider ID : 8032164 Provider Name: Black, Betzy08

Other Services Details

Agency: Franklin County Children Services Board

Service Category: * Case Management

Service Type: * Case Planning Service Status: * Active

Service Description: * Case Planning

Service Capacity: Effective Date: * 12/27/2006

Save Cancel

Click here to add the service credential to the provider's record.

How to record training session information

Before a provider can be certified for a particular level of care, the provider members must complete the training for the competency areas identified in the training needs assessment and training plan. The agency then sponsors the training sessions to help the provider members meet these requirements. As the sessions are completed, you update the provider member's training record.

1. From the Home screen, click the **Provider** tab, then click the **Training** tab. The Training Session Search Criteria screen appears.
2. Enter the criteria for the training session(s) you want to view and click **Search**. The training sessions that meet

your criteria appear in the Search Results table.

3. Click the **edit** link for the session you want to update, or click **Add Session** to record a new training session. The Training Session Information screen appears.
4. Complete all of the fields on this screen and click **Apply**.
5. Click the **Additional Information** tab. The Additional Training Information screen appears.
6. Select **Yes** or **No** to answer the first question. If you selected **Yes**, select **Yes** or **No** to answer all the remaining questions in this screen.
7. Click the **Participants** tab. The Training Participants List screen appears.
8. To enroll a provider member in this training session, click **Add Participant**. Complete the fields and click **Save**.

The screenshot shows the 'Provider > Training' interface with three tabs: 'Session Information', 'Additional Information', and 'Participants'. The 'Session Information' tab is active, displaying the following fields and controls:

- Session Name:** A text input field with an annotation: "Enter the name of the session here."
- Instructor Name:** A text input field.
- Session Date:** A date picker with an annotation: "Enter the date on which the session was held or is scheduled to be held."
- Agency:** A dropdown menu.
- Session Start Time:** A time picker set to 8:00 AM with an annotation: "Enter the start and end times this session was or is scheduled to begin and end."
- Actual Hours:** A text input field with an annotation: "Enter the number of hours it took to present this session here."
- Delivery Method:** A dropdown menu.
- Session End Time:** A time picker set to 5:00 PM.
- Maximum Participants:** A text input field with an annotation: "Enter the maximum number of participants here."
- Training Competencies:** A section with 'Available Topics' (Mapping Default, Agency Policies, Behavior management techniques, Caring for sexually abused children, Child development) and 'Selected Types' (empty). Buttons include 'Add >', 'Add All >>', '< Remove', and '<< Remove All'.
- Status:** A dropdown menu with an annotation: "Click here to select the status of this training session record."

Annotations for the 'Additional Information' and 'Participants' tabs are also present:

- Additional Information:** "Click here to record allowable costs the agency incurred when it conducted this training session."
- Participants:** "Click here to record the list of providers who attended this training."

How to record a provider's service contract

Ohio SACWIS allows you to maintain your agency's contract with a provider for a specific service. You may need to update a contract for compliance monitoring and outcomes.

1. From the Home screen, click the **Provider** tab.
2. Click the **Workload** tab and display your workload. The providers assigned to you appear in a table.
3. Click the select link next to the ID of the provider whose details you want to view. The Provider Overview screen appears.
4. Click the **Contracts** link in the menu on the left. The Contracts list screen appears.
5. If you want to limit the display, select the criteria by which you want to filter the list of service contracts and click **Filter**. The service contracts that meet your criteria appear in the table below.
6. Click the **edit** link to update the details of an existing service contract record, or click **Add Contract** for a new service contract. The Contract Details screen appears.
7. Complete the fields on this screen. You must complete **Contract Begin**, **Contract Type**, **Contract End**, and **Status** fields.
8. If the contract includes service costs, enter cost information. Complete these fields and click **Save**, then **Close**.
9. Click **Save**. You are returned to the Contracts list screen.

The screenshot shows the 'Contract Details' form in the Ohio SACWIS system. At the top, it displays 'HOME', 'Provider ID: 32320', and 'Provider Name: McCormick, Judy & McCormick, Randy'. The form is divided into several sections:

- Contract Details:** Includes fields for Agency, Vendor Number, Contract Begin (with a calendar icon), Contract End (with a calendar icon), Approved Date, Encumbered Date, Notification Type (dropdown), Notification Ceiling (dropdown), and Comments.
- Contract Information:** Includes Contract Type (dropdown), Contract Number, Contracted Amount, Encumbered Amount, Used Amount, and Status (dropdown).
- Amendments:** A table with columns for Amend #, Date, Begin, End, Amount, and Approval Date. Below the table is a blue button labeled 'Add Amendment'.

Annotations with arrows point to specific fields:

- 'Enter the dates on which the contract begins and ends.' points to the Contract Begin and Contract End date pickers.
- 'Select the type of service contract here.' points to the Contract Type dropdown.
- 'Select the status of this contract.' points to the Status dropdown.
- 'Click here to record a new amendment to this contract.' points to the 'Add Amendment' button.

How to record a recruitment plan

By May 1st of every year, agencies must submit their recruitment plan to ODJFS. A recruitment plan describes the activities an agency will perform to recruit foster and adoptive families. The recruitment efforts help ensure that effective strategies are in place to meet adoption and foster care placement needs of children served by the counties. To save time, you can copy a plan created by your agency or another one, then customize it for the current-year plans at your agency.

1. From the Home screen, click the **Provider** tab, then click the **Recruitment** tab. The Recruitment Plan search screen appears.
2. If you want to limit the display select the criteria by which

you want to filter the list of recruitment plans and click **Filter**. The recruitment plans that meet your criteria appear in the table below.

3. If you want to update an existing plan, click the **edit** link for the plan you want to update. If you want to copy an existing plan to create a new one, click the **copy** link. To start a completely new plan, click **Add Plan**. The Recruitment Plan Information screen appears.
4. Complete all of the fields in the Recruitment Plan Information box.
5. In the Recruitment Plan Detail box, click the **edit** link next to each topic. Describe the specific activities planned regarding this topic and click **Save**. You are returned to the Recruitment Plan screen. Repeat step 5 for each topic, click **Save**, then click **Process for Approval**.

Select the type of recruitment plan here.

Enter the name of the recruitment plan here.

Enter the date on which the recruitment plan is effective here.

The screenshot shows the 'Recruitment Plan Information' form for 'Adams County Children Services Board'. The form includes the following fields and sections:

- Agency:** Adams County Children Services Board
- Plan Type:** A dropdown menu.
- Plan Name:** A text input field.
- Effective Date:** A date picker field.
- Expiration Date:** A date picker field.
- # of Projected Inquiries:** A text input field.
- # of Planned Recruitment Events:** A text input field.
- # of Children to be Placed:** A text input field.
- # of Families to be Approved/Certified:** A text input field.
- Recruitment Plan Details:** A table with two columns: 'Plan Topic' and 'Narrative'.

Annotations with arrows point to the 'Plan Type' dropdown, the 'Plan Name' field, the 'Effective Date' field, and the 'Expiration Date' field.

Click here to enter the date on which the recruitment plan will no longer be effective.

How to record a recruitment event

Recruitment events are held on behalf of an agency or provider to recruit potential foster or adoptive parents. Although it is optional, recording recruitment event activities can help support the agency's future recruitment planning. To save time, you can copy an event from your agency or another, then change the details to describe the new event.

1. From the Home screen, click the **Provider** tab, then click the **Recruitment** tab. The Recruitment Event search screen appears.
2. Click **Events**. The recruitment event search screen appears.
3. If you want to limit the display select the criteria by which you want to filter the list of recruitment events and click

Filter. The recruitment events that meet your criteria appear in the table below.

4. If you want to update an existing event, click the **edit** link for the event you want to update. If you want to copy an existing event to create a new one, click the **copy** link. To start a completely new event, click **Add Event**. The Event information screen appears.
5. Complete the details of the event and click **Save**.

The screenshot shows the 'Event Information' tab of a recruitment event form. The form is divided into two main sections: 'Event Information' and 'Event Outcome'. The 'Event Information' section contains the following fields:

- Agency: ***: Franklin County Children Services Board
- Event Type: ***: [Dropdown menu]
- Event Name: ***: [Text input field]
- Begin Date: ***: [Date picker]
- End Date: ***: [Date picker]
- Event Goal/Objective: ***: [Text area]
- Event Description: ***: [Text area]
- Event Sponsors:**: [Text area]
- Materials/Equipment Needs:**: [Text area]

Each text area has a 'Spell Check' and 'Clear' button. The 'Recruiter: *' field is a dropdown menu with 'Recruiter 2' selected.

Callouts point to specific parts of the form:

- 'Click here to record the details of a recruitment event.' points to the 'Event Information' tab.
- 'Click here to record outcomes after an event.' points to the 'Event Outcome' tab.
- 'Complete these fields to record basic information about this event.' points to the Agency, Event Type, Event Name, Begin Date, and End Date fields.
- 'The screen includes other optional fields for collecting additional information about an event.' points to the Event Goal/Objective, Event Description, Event Sponsors, and Materials/Equipment Needs fields.

Chapter 10

Financial Management

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Financial Management, 10-2

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Financial Management

Financial Management tasks are performed by caseworkers and financial workers. They are organized in the following functions:

- Services administration
- Eligibility and reimbursability determination
- Medicaid and HMO reimbursement
- Child benefits
- Payment rosters and adjustments.

Services administration

The caseworkers complete requests for placement and service authorizations, entering the details of the placement or service on the case record. The financial worker records the authorizations for placements or services documented on the case record.

Eligibility and reimbursability

As an eligibility specialist, you use Ohio SACWIS to determine a client's eligibility for federally funded programs under Title IV-E. The programs include foster care maintenance (FCM) and adoption assistance (AA) payments for eligible children in temporary or permanent custody of your agency. If the client is eligible for FCM, the agency is generally reimbursed for payments made during a placement episode.

Child benefits

A child's benefit payments (child support, SSA, SSI, and so on) are used to offset the cost of the child's care. Payments are made to benefit accounts, which are established when a benefit application is submitted. The account is used to document whether the application is accepted, rejected, or closed, and to accept approved benefit payments.

Medicaid and HMO reimbursement

A Medicaid record is automatically created in the Medicaid Management Information System (MMIS) and in Ohio SACWIS when the child has been determined eligible for FCM or AA reimbursements under Title IV-E. You can record a child's enrollment in a health maintenance organization (HMO), information which is also stored in MMIS.

Payment rosters and adjustments

A payment requests roster organizes payment requests ready for payment into logical groupings for ease of validation and approval. These groupings are organized according to your agency practices. You can view a history of the payment requests that have been paid, in order to determine the payee, disbursement date, payment ID number, adjustment ID number, amounts, dates, and so on.

This chapter explains:

- How to record agency services
- How to view a placement or service authorization
- How to record a placement or service authorization
- How to view a child's benefit accounts and payments
- How to record a child's benefit account or payment
- How to generate payment requests
- How to view a payment requests roster
- How to create a payment requests roster
- How to disburse payments
- How to view an agency repayment plan
- How to view and record payment adjustments
- How to view a child's eligibility/reimbursability history
- How to determine IV-E foster care maintenance eligibility
- How to determine IV-E adoption assistance eligibility
- How to view Medicaid, HMO, and MMIS histories and record information
- How to view a child's CRIS-E information

How to record agency services

Some agency services are provided at no cost, for example, case management supportive services, life skills, and so on. Other services include standardized services that an agency provides at a cost. This cost may be adjusted by certain cost factors, like the child's age, or customized to accommodate the agency's practices.

1. From the Home screen, click the **Financial** tab, click the **Services** tab, and click the **Maintain Service** link in the menu on the left. The Agency Services search screen appears.
2. In the **Agency** field, select the agency whose service information you want to update.
3. Click **Search**. The service record(s) that meet your criteria appear in the search results table.
4. Click the **edit** link for the service record you want to update, or select a **Service Category** and click **Add Service** for a new service. The Agency Services Detail screen appears.
5. Complete the fields on this screen. You must complete at least the **Service Description** and **Service Long Description**. Both of these descriptions must be unique within your agency.
6. Select each check box that applies to this service, including the **Unpaid Service** check box.
7. Click **Apply** to save the information. To add service costs for standardized services, click **Add Service Cost**.
8. Click **Save**. You are returned to the Agency Services search screen.

The screenshot shows the 'Agency Services Search Criteria' and 'Agency Services Search Results' sections. The 'Search Criteria' section includes dropdown menus for 'Agency' (Adams County Children Services Board), 'Service Category/Type' (All), and 'Sort Result By' (ServiceCategory / Type (Ascending)). A 'Search' button is located below these fields. The 'Search Results' section displays a table with columns for 'Service Category / Type', 'Service Description', 'UOM', and 'Standardized Cost'. The table lists several services, including 'Adoption Assistance/ PASSS' and 'Child Care/ Head Start Plus'. Callouts point to various elements: 'Maintain Service' link, 'Statewide Ceilings', 'Provider Ceilings', 'Service Authorization', 'Agency Services Search Criteria' fields, 'Search' button, 'Agency Services Search Results' table, and 'Add Service' link.

Click here to edit or view agency services.

Click here to edit or view statewide ceilings.

Click here to edit or view provider ceilings.

Click here to edit or view a service authorization.

Click here to edit or view a service category and type for an agency.

Click here to display information related to agency services, statewide and provider ceilings, and service authorization.

Click here to display Financial information related to agency services, child eligibility, payments and benefits.

Click here to select the agency you want to record services for.

Click here to select the service type and category you want to record.

Click here to select the order in which you want to see the services.

	Service Category / Type	Service Description	UOM	Standardized Cost
view	Adoption Assistance/ PASSS	PASSS		
edit	Adoption Assistance/ PASSS	PASSS	PerDiem	\$75.00
edit	Case Management/ Arranging for Services	Arranging for Services		
edit	Case Management/ Case Planning	Case Planning		
edit	Child Care/ Head Start	Head Start		
edit	Child Care/ Head Start Plus	Head Start Plus	Hourly	\$25.00
view	Child Care/ Protective Day Care Services	Obsolete-Protective Day Care Services	Hourly	\$1.00
edit	Child Care/ Head Start Plus	Head Start Plus	OneTime	\$50.00

How to view a placement or service authorization

The caseworkers complete requests for placement and service authorizations, entering the details of the placement or service on the case record. The financial worker records the authorizations for placements or services documented on the case record.

1. From the Home screen, click the **Financial** tab, click the **Services** tab, then click the **Service Authorization** link in the menu on the left. The Service Authorizations list screen appears. It lists placement or service authorizations.
2. Click the **view** link for the authorization you want to view. The Service Authorization Detail screen appears.

The cost type on this screen appears as “Contracted” for contracted costs or “Standardized” for standardized costs. If the system does not find either cost type record in the system, “User Defined” appears. For standard and contract costs, the screen retrieves the cost information from the Agency Services screen or on the provider’s Contract Details screen.

3. Click **Close**. You are returned to the Service Authorization list screen.

The screenshot shows the 'Service Authorizations' list screen. The top navigation bar includes 'Home', 'Intake', 'Case', 'Provider', 'Financial', and 'Administration'. The 'Financial' tab is active, with sub-tabs for 'Service', 'Eligibility', 'Payment', and 'Benefits'. A left-hand menu contains links for 'Maintain Service', 'Statewide Ceilings', 'Provider Ceilings', and 'Service Authorization'. The main area features a 'Service Authorizations Filter Criteria' section with fields for Person ID, Placement/Case Service, Status, From Begin Date, To Begin Date, and Sort By. Below the filters are 'Filter' and 'Clear Form' buttons. A table displays the results, with columns for Person ID, Client Name, Provider Name, Service Description, Status, Begin Date, and End Date. Callouts point to various elements: 'Click here to edit or view agency services.' points to the 'Service' sub-tab; 'Click here to edit or view statewide ceilings.' points to 'Statewide Ceilings'; 'Click here to edit or view provider ceilings.' points to 'Provider Ceilings'; 'Click here to edit or view a service authorization.' points to 'Service Authorization'; 'Click here to display information related to agency services, statewide and provider ceilings, and service authorization.' points to the 'Service' sub-tab; 'Click here to display Financial information related to agency services, child eligibility, payments and benefits.' points to the 'Financial' tab; and 'Click here to edit or view a service authorization for a specific client.' points to the 'view' link in the table.

Click here to edit or view agency services.

Click here to edit or view statewide ceilings.

Click here to edit or view provider ceilings.

Click here to edit or view a service authorization.

Click here to display information related to agency services, statewide and provider ceilings, and service authorization.

Click here to display Financial information related to agency services, child eligibility, payments and benefits.

Click here to edit or view a service authorization for a specific client.

Person ID	Client Name	Provider Name	Service Description	Status	Begin Date	End Date
view edit	32543	Holly, Sally	Jerry Jones	Family Foster Home	Approved	01/01/2006
view edit	15536	Smith, Christina	Jerry Jones	Family Foster Home	Approved	01/01/2006 01/05/2006
view edit	16347	Beth, Amber	Jerry Jones	Family Foster Home	Approved	01/01/2006 01/25/2006

How to record a placement or service authorization

Caseworkers complete requests for placement and service authorizations, entering details of the placement or service on the case record. As the financial worker, you record the authorizations for placements or services documented on the case record.

1. From the Home screen, click the **Financial** tab, click the **Service** tab, then click the **Service Authorization** link in the menu on the left. The Service Authorizations list screen appears. It lists placement or service authorizations.
2. Click the **edit** link for the placement or service you want to authorize. The Service Authorization Detail screen appears.

3. Enter information in this screen as needed. Enter any details about this authorization in the **Comments** field.
4. If a standardized or contract cost is not already in the system, **add a per diem cost**. You can add any additional per diem costs; however, all such costs are applied to the overall maintenance ceiling.
5. Click **Process for Approval**. The authorization is sent to your supervisor for approval.
6. If this authorization requires an out-of-cycle payment for an added cost, click **Generate Payment**, then click **Save**. You are returned to the Service Authorization list screen.

The screenshot shows the 'Service Authorization Detail' screen. At the top, there are navigation tabs: Home, Intake, Case, Provider, **Financial**, and Administration. Under the 'Financial' tab, there are sub-tabs: Service, Eligibility, Payment, and Benefits. The 'Service' sub-tab is active.

Client Name: Beth, Amber Person ID: 16347 Agency: Adams County Children Services Board
 Creation Date: 01/04/2006 Last Modified Date: 01/25/2006

Service Authorization Detail

Service Description:			Authorization Number:	15060
Status:	Approved		Cost Type:	Service
Unit of Measure:		Units:		Ended
Begin Date:	01/01/2006		Maintenance:	N/A
End Date:	01/25/2006		Administration:	N/A
End Reason:	Moved to Adoptive Home		Case Management:	N/A
Provider Name:	Jerry Jones	Provider ID:	Transportation/Maintenance:	N/A
Non-Reimbursable Placement Reason:			Transportation/Administration:	N/A
Delivered Units:	0		Other Direct Services:	N/A
Amount Paid:	\$0.00		Behavioral Health Care:	N/A
Amount Remaining:	\$0.00		Other:	N/A
			Other Per Diem Costs:	\$0.00
			Basic Cost:	N/A
				<input type="button" value="Calculate"/>
			Total Amount:	\$0.00

Comments:

Callouts:

- Click here to display information related to agency services, statewide and provider ceilings, and service authorization. (Points to the 'Service' sub-tab)
- Click here to display Financial information related to agency services, child eligibility, payments and benefits. (Points to the 'Financial' tab)
- Enter the number of units that are approved for a service. (Points to the 'Units' input field)
- Enter additional comments about the cost. You can enter up to 4000 characters. (Points to the 'Comments' field)

How to view a child's benefit accounts and payments

A child's benefit payments (child support, SSA, SSI, and so on) are used to offset the cost of the child's care. Payments are made to benefit accounts, which are established when a benefit application is submitted. The account is used to document whether the application is accepted, rejected, or closed, and to accept approved benefit payments.

1. From the Home screen, click the **Financial** tab, and click the **Benefits** tab. The Client Benefit Account search screen appears.
2. Enter either the child's social security number, Person ID, or IV-E (SETS) case number.

3. Click **Search**. The client accounts that meet your search criteria appear in the search results table.
4. Click the **view** or **edit** link next to the account or benefit record you want to view. The Add/Update Account or Add/Update Benefit screen appears.
5. Click **Cancel**. You are returned to the Client Benefit Account search screen.

The screenshot shows a web application interface with a navigation bar at the top containing tabs: Home, Intake, Case, Provider, **Financial**, and Administration. Below the navigation bar, there are sub-tabs: Service, Eligibility, Payment, and Benefits. A search form titled "Client Benefit Account Criteria" is displayed, containing two input fields: "SSN:" and "Person ID:". A blue "Search" button is located at the bottom left of the form. Annotations with arrows point to the "Financial" tab, the "Benefits" sub-tab, the "SSN:" and "Person ID:" fields, and the "Search" button. Two additional annotations point to the "Eligibility" and "Benefits" sub-tabs, indicating where to click for specific information.

Enter one of these fields and click Search to select a client benefit account.

Click here to display Financial information related to agency services, child eligibility, payments and benefits.

Click here to display client benefit account information.

How to record a child's benefit account or payment

A child's benefit payments (child support, SSA, SSI, and so on) are used to offset the cost of the child's care. Payments are made to benefit accounts, which are established when a benefit application is submitted. The account is used to document whether the application is accepted, rejected, or closed, and to accept approved benefit payments.

1. From the Home screen, click the **Financial** tab, and click the **Benefits** tab. The Client Benefit Account search screen appears.
2. Enter either the child's social security number, Person ID, or IV-E (SETS) case number.

3. Click **Search**. The client accounts that meet your search criteria appear in the search results table.
4. Click the **edit** link next to the account you want to update, or click **Add Account** for a new account, or **Add Benefit** for a new benefit. The Add/Update Account or Add/Update Benefit screen appears.
5. Complete the fields on this screen.
6. Click **Save**. You are returned to the Client Benefit Account search screen.

Click here to display Financial information related to agency services, child eligibility, payments and benefits.

Click here to display client benefit account information.

The screenshot shows the 'Financial' tab selected in the top navigation bar. Below it, the 'Benefits' sub-tab is active. The main content area is titled 'Client Benefit Account Criteria' and contains two input fields: 'SSN:' and 'Person ID:'. The 'Person ID' field contains the value '26100'. Below these fields is a blue 'Search' button. The 'Client Benefit Account Search Results' section displays client information: Name: Baccus, Russell; DOB: 12/28/1952; and Placement Address. Below this is an 'Accounts' table with columns: Type, Claim #, Application Date, Effective Date, Amount, Rejection Date, and Closing Date. A blue 'Add Account' button is positioned below the table. At the bottom, there is a 'Benefits' table with columns: Type, Agency, Transaction Type, Transaction Date, Amount, Payment Begin Date, and Payment End Date. Annotations with arrows point to the 'Person ID' field, the 'Search' button, and the 'Add Account' button. Two other annotations at the top point to the 'Financial' and 'Benefits' tabs.

Enter the client's social security number here.

Click here to initiate the search.

Click here to add a new account for a client.

How to generate payment requests

Each month you process your agency's payroll, or generate payment requests. The system retrieves the service authorizations due for payment in the month you select, as well as any adjustments the system calculated automatically.

1. From the Home screen, click the **Financial** tab, click the **Payment** tab, and click the **Payment Request Processing** link in the menu on the left. The Process Payment Requests screen appears.
2. Complete the **Begin Date** and **End Date** fields to indicate the month for which you are processing the payroll.
3. Select the check box next to each service authorization type you want to process.

4. Click **Process** to process the payroll. (If you click **Refresh**, the system removes your entries and refreshes the screen.)

The screenshot shows the 'Process Payment Requests' interface. At the top, there are navigation tabs: Home, Intake, Case, Provider, **Financial**, and Administration. Under the 'Financial' tab, there are sub-tabs: Service, Eligibility, **Payment**, and Benefits. The main content area shows the agency name 'Adams County Children Services Board' and a form for 'Process Payment Requests' with 'Begin Date' and 'End Date' fields. Below this is a table of service authorizations with columns for 'Select', 'Service Authorization Type', 'Date & Time Last Processed', and 'Status'. At the bottom are 'Process' and 'Refresh' buttons.

Callouts:

- Click here to process payment requests. (Points to **Payment Request Processing**)
- Click here to create or select a payment roster. (Points to **Payment Requests Roster**)
- Click here to view a payment request roster. (Points to **Payment Requests Roster**)
- Click here to create a manual payment request. (Points to **Manual Payment Request**)
- Click here to view or adjust a payment. (Points to **Payment History Search**)
- Click here to submit a roster for disbursement. (Points to **Submit Rosters for Disbursement**)
- Click here to disburse payments. (Points to **Disburse Payment**)
- Click here to create or update repayment plan details. (Points to **Agency Repayment Plan**)
- Click here to process reimbursement invoices. (Points to **Reimbursement Invoice Update**)
- Click here to disburse adoption subsidies. (Points to **Adoption Subsidy Disbursements**)

Table Data:

Select	Service Authorization Type	Date & Time Last Processed	Status
<input type="checkbox"/>	Ancillary	12/01/2004 - 12/31/2004 Requested 12/09/2005	Process Requested
<input type="checkbox"/>	Training	12/01/2004 - 12/31/2004 Requested 03/29/2006	Process Requested
<input type="checkbox"/>	Own Foster	12/01/2004 - 12/31/2004 Requested 12/09/2005	Process Requested
<input type="checkbox"/>	Mapping Default	12/01/2004 - 12/31/2004 Requested 12/09/2005	Process Requested
<input type="checkbox"/>	Pre-Paid Services	01/01/2005 - 12/31/2005 Requested 11/14/2005	Process Requested
<input type="checkbox"/>	Purchased Care	01/01/2005 - 12/31/2005 Requested 11/14/2005	Process Requested
<input type="checkbox"/>	Adoption Subsidy-Local Share	12/01/2004 - 12/31/2004 Requested 12/09/2005	Process Requested

Additional Callouts:

- Click here to display Financial information related to agency services, child eligibility, payments and benefits. (Points to the **Financial** tab)
- Click here to display payment information, including requests, rosters, and disbursements. (Points to the **Payment** sub-tab)

How to view a payment requests roster

A payment requests roster organizes payment requests ready for payment into logical groupings for ease of validation and approval. These groupings are organized according to your agency practices.

1. From the Home screen, click the **Financial** tab, click the **Payment** tab, and click the **Payment Requests Roster** link in the menu on the left. The Payment Requests Roster Search Criteria screen appears.
2. Complete the **Worker** and **Roster Name** fields to select the roster you want to view.
3. Click **Search**. The roster appears in the search results table,

along with payment totals.

4. Click the plus sign for a payment record to see additional details about that service authorization. A new line appears in the table for that record.
5. Click the payee name link to view the provider's information.
6. Click the person name link to view the payment history page for the child named in the record.

The screenshot shows the 'Payment Requests Roster Search Criteria' screen. The top navigation bar includes 'Home', 'Intake', 'Case', 'Provider', 'Financial', and 'Administration'. Under 'Financial', there are sub-tabs for 'Service', 'Eligibility', 'Payment', and 'Benefits'. The 'Payment' sub-tab is active. On the left, a menu lists various options, with 'Payment Requests Roster' highlighted. The main area contains search criteria fields: 'Worker: *' and 'Roster Name: *', both with dropdown menus. A 'Sort Results By:' dropdown is also present. A 'Search' button is at the bottom. Three callouts are present: one pointing to the 'Payment Requests Roster' menu item with the text 'Click here to view a payment request roster.'; another pointing to the 'Worker: *' dropdown with the text 'Select the worker whose rosters you want to view.'; and a third pointing to the 'Roster Name: *' dropdown with the text 'Select the name of the roster you want to view.'.

Click here to view a payment request roster.

Click here to display Financial information related to agency services, child eligibility, payments and benefits.

Click here to display payment information, including requests, rosters, and disbursements.

Select the worker whose rosters you want to view.

Select the name of the roster you want to view.

How to create a payment requests roster

A payment requests roster organizes payment requests ready for payment into logical groupings for ease of validation and approval. At the highest level, rosters are organized according to the fiscal worker. Beyond that level, the system gives you a great deal of flexibility in organizing rosters. For example, you might want to group foster care miscellaneous services along with regular foster care payments to make it easy to view all activity for a particular provider.

1. From the Home screen, click the **Financial** tab, click the **Payment** tab, and click the **Payment Requests Search** link in the menu on the left. The Payment Requests search screen appears.

2. Complete the fields in the Search Criteria area to select the criteria of the roster you want to create.
3. Click **Search**. The payment requests that meet your criteria appear in the search results table.
4. Review the list of payment request records and click **Create Roster**. The Create Roster screen appears.
5. Either select an existing category in the **Select Category** field or enter the name of a new category in the **Roster Category** field.
6. Enter a name for this roster in the **Roster Name** field. Refer to the names currently in use to avoid duplication.
7. Click **Save**. You are returned to the Process Payment Requests search screen.

The screenshot shows the 'Payment Requests Search Criteria' interface. At the top, there are navigation tabs: Home, Intake, Case, Provider, **Financial**, and Administration. Under the 'Financial' tab, there are sub-tabs: Service, Eligibility, **Payment**, and Benefits. A 'help' link is visible in the top right corner.

On the left side, there is a vertical menu with the following links: [Payment Request Processing](#), [Payment Requests Search](#), [Payment Requests Roster](#), [Manual Payment Request](#), [Payment History Search](#), [Submit Rosters for Disbursement](#), [Disburse Payment](#), [Agency Repayment Plan](#), [Reimbursement Invoice Update](#), and [Adoption Subsidy Disbursements](#). An annotation with an arrow points to the 'Payment Requests Search' link, stating: 'Click here to create or select a payment roster.'

The main content area is titled 'Payment Requests Search Criteria' and contains the following fields:

- Pay Begin: [text input]
- Pay End: [text input]
- Ancillary/Board & Care: [dropdown menu]
- OR Service Authorization Type: [dropdown menu]
- Contract #: [dropdown menu]
- OR Vendor #: [dropdown menu]
- Person: [dropdown menu]
- Service Category: [dropdown menu]
- Payee: [dropdown menu]
- Service Type: [dropdown menu]

 Below these fields is a 'Sort Results By:' dropdown menu set to 'Payee'. A blue 'Search' button is located at the bottom left of the criteria section.

Two annotations with arrows point to the sub-tabs:

- An arrow points to the 'Eligibility' sub-tab with the text: 'Click here to display Financial information related to agency services, child eligibility, payments and benefits.'
- An arrow points to the 'Payment' sub-tab with the text: 'Click here to display payment information, including requests, rosters, and disbursements.'

How to disburse payments

Once payment requests are approved, you collect completed rosters into single or multiple files. If the roster files look correct, you disburse these files to the agency's accounting system for final processing and payment.

1. From the Home screen, click the **Financial** tab, click the **Payment** tab, and click the **Submit Rosters for Disbursement** link in the menu on the left. The Submit Rosters for Disbursement screen appears.
2. Select the check box next to each roster you want to include in this file.
3. Select the disbursement file name in the **Select Disbursement** field, or enter a new file name in the **New Disbursement** field.

Disbursement field.

4. Click **Save** and repeat steps 2-4 for each disbursement file.
5. Click the **Disburse Payment** link in the menu on the left. The Disburse Payment search screen appears.
6. Enter the file name in the Disbursement Name field and click **Search**. The search results table is displayed.
7. Select **Payment Report** in the **Option** field, then click **Go**. The system displays the Payment Report.
8. Verify the payment requests.
9. If they appear to be correct, select **Final Payment** in the **Option** field, enter the disbursement date in the **Disburse Date** field, then click **Go**. The disbursement file is sent to the agency account system for final processing and payment.

The screenshot shows the 'Submit Rosters for Disbursement' screen. The top navigation bar includes 'Home', 'Intake', 'Case', 'Provider', 'Financial', and 'Administration'. The 'Financial' tab is active, with sub-tabs for 'Service', 'Eligibility', 'Payment', and 'Benefits'. The 'Payment' sub-tab is selected. The main content area is titled 'Submit Rosters for Disbursement' and contains a large text box with the instruction: 'Select each roster you want to include in this file.' Below this text box are two fields: 'Select Disbursement:' with a dropdown menu and 'OR' followed by 'New Disbursement:' with a text input field. A 'Save' button is located at the bottom left of the form area. A left-hand menu contains several links, with 'Submit Rosters for Disbursement' and 'Disburse Payment' highlighted. Annotations with arrows point to these links and the 'Save' button. Two additional annotations at the top point to the 'Financial' and 'Payment' sub-tabs. A 'help' link is visible in the top right corner.

Click here to display Financial information related to agency services, child eligibility, payments and benefits.

Click here to display payment information, including requests, rosters, and disbursements.

Click here to submit a roster for disbursement.

Click here to disburse a payment.

Select a disbursement file name here.

Enter a new disbursement file name here.

How to view an agency repayment plan

A repayment plan is created when an agency receives more from the State in IV-E reimbursements than it was actually due. Typically, the agency discovers that children who have been receiving IV-E payments are not actually eligible for them, and the agency must return those funds to the State. An agency may elect to return the funds over a period of time, according to a repayment plan.

1. From the Home screen, click the **Financial** tab, then click the **Payment** tab, then click the **Agency Repayment Plan** link in the menu on the left. The Agency Repayment Plan search screen appears.

2. In the **Agency** field, select the agency whose plan you want to view.
3. Indicate whether you want to view active, closed or both types of repayment plans.
4. Click **Search**. The repayment plan(s) for the agency you selected appear in the search results table.
5. Click the check box for the repayment plan whose transactions you want to use, or click the check box in the **Select** column heading to view transactions in all repayment plans.
6. Click **Show Selected Transactions**. The Payment Transaction Details screen appears.
7. Click **Close**. You are returned to the Agency Repayment Plan search screen.

The screenshot shows the Agency Repayment Plan Search interface. At the top, there are navigation tabs: Home, Intake, Case, Provider, **Financial**, and Administration. Under the **Financial** tab, there are sub-tabs: Service, Eligibility, **Payment**, and Benefits. A left-hand menu contains links such as [Payment Request Processing](#), [Payment Requests Search](#), [Agency Repayment Plan](#), and others. The main content area is titled "Agency Repayment Plan Search Criteria" and includes a dropdown for "Agency:" set to "Adams County Children Services Board". Below this are radio buttons for "Active", "Closed", and "Both". A "Search" button is present. Below the search criteria is a table titled "Agency Repayment Plan Search Results" with columns: Select, Plan ID, Agency, Repay Start Date, Repay End Date, Repay Max Per Month, Beginning Balance, and Current Balance. The table shows a total owed of \$0.00 and a total monthly repayment of \$0.00. At the bottom of the table are buttons for "Add Repayment Plan" and "Show Selected Transactions".

Click here to create or update repayment plan details. (Callout pointing to the Agency Repayment Plan link in the left menu)

Click here to display Financial information related to agency services, child eligibility, payments and benefits. (Callout pointing to the Financial tab)

Click here to display payment information, including requests, rosters, and disbursements. (Callout pointing to the Payment sub-tab)

Select the status of the repayment plans you want to view, whether active, closed, or both. (Callout pointing to the radio buttons)

Click here to create a new repayment plan. (Callout pointing to the Add Repayment Plan button)

Select a check box above and click here to show selected transactions. (Callout pointing to the Show Selected Transactions button)

How to view and record payment adjustments

The system generates most payment adjustments automatically, when rate and service authorization changes are made during a claim period. Adjustments are made manually for situations that the system does not handle automatically. Adjustments automatically generate payment request records and can be viewed during payment processing.

1. From the Home screen, click the **Financial** tab, click the **Payment** tab, and click the **Payment History Search** link in the menu on the left. The Payment History search screen appears.
2. Click the link for the search criteria you want to use, then

enter the criteria.

3. Click **Search**. The records that match your criteria appear in the search results table.
4. To adjust a payment request, click the **adjust** link for the payment request record you want to adjust. The Payment Adjustment Details screen appears. When you record an adjustment, the system generates a reversal of the original payment request and creates a corrected payment request, or “replacement.”
5. To view the details of the adjustment, click the replacement link for the record you want to view.
6. Click **Add Replacement**. The Replacement Details screen appears. Complete the fields and then click **Save**. You are returned to the Payment Adjustment Details screen.

The screenshot shows the 'Payment History Search' screen. At the top, there are navigation tabs: Home, Intake, Case, Provider, **Financial**, and Administration. Under the 'Financial' tab, there are sub-tabs: Service, Eligibility, **Payment**, and Benefits. A 'help' link is visible in the top right corner. On the left side, there is a vertical menu with several links: [Payment Request Processing](#), [Payment Requests Search](#), [Payment Requests Roster](#), [Manual Payment Request](#), **[Payment History Search](#)**, [Submit Rosters for Disbursement](#), [Disburse Payment](#), [Agency Reimbursement Plan](#), [Reimbursement Invoice Update](#), and [Adoption Subsidy Disbursements](#). The main content area is titled 'Payment History Search Criteria'. It features a dropdown menu for 'Agency:' set to 'Adams County Children Services Board'. Below this are two input fields: 'Payee ID:' and 'Vendor #:'. There are 'Search Payee' and 'Clear' buttons. Below the input fields, there are three checked checkboxes: [Provider Search Criteria](#), [Person Search Criteria](#), and [Payment Search Criteria](#). At the bottom of the search criteria section, there is a 'Sort Results By:' dropdown menu set to 'Payee'. A large 'Search Payment History' button is at the bottom of the main content area. Annotations with arrows point to various elements: 'Click here to view or print a payment request history, or to record payment adjustments.' points to the 'Payment History Search' link in the left menu. 'Click here to display Financial information related to agency services, child eligibility, payments and benefits.' points to the 'Financial' tab. 'Click here to display payment information, including requests, rosters, and disbursements.' points to the 'Payment' sub-tab. 'Click on one of these links to search for a payment request history based on payee, provider, person, or payment.' points to the three checked search criteria checkboxes. 'Click here to initiate the search.' points to the 'Search Payment History' button.

How to view a child’s eligibility/reimbursability history

As an eligibility specialist, you use Ohio SACWIS to determine a client’s eligibility for federally funded programs under Title IV-E. The programs include foster care maintenance (FCM) and adoption assistance (AA) payments for eligible children in temporary or permanent custody of your agency. If the client is eligible for FCM, the agency is generally reimbursed for payments made during a placement episode.

2. Click Person Search, then locate and select the child whose eligibility you want to view. After you select the child, the screen displays histories of the eligibility and reimbursability records.
3. Click the view link for a record to view the details.
4. Click Cancel. You are returned to the history screen.

1. From the Home screen, click the Financial tab, click the Eligibility tab, and click the Eligibility/Reimbursability link in the menu on the left. The Child Selection screen appears.

The screenshot shows the Ohio SACWIS Financial Management interface. The top navigation bar includes Home, Intake, Case, Provider, Financial, and Administration. The Financial tab is active, showing sub-tabs for Services, Eligibility, Payment, and Benefits. A left-hand menu is expanded to show Eligibility/Reimbursability, with sub-items for Adoption Subsidy, Medicaid Eligibility, and CRIS-E Inquiry. The main content area is titled 'Child Selection' and contains a 'Person Search' button, a search form with fields for Person ID, Name, and Case ID, and two data tables: 'Program Eligibility' and 'Program Reimbursability'. Each table has a 'view' link for its first row. Below each table is an 'Add' button. Callouts with arrows point to various elements: 'Click here to determine a client’s eligibility for federally funded programs under Title IV-E and to view or update Medicaid and HMO reimbursement' points to the Eligibility/Reimbursability menu item; 'Click here to view adoption subsidies', 'Click here to view Medicaid eligibility details', and 'Click here to view CRIS-E details' point to the sub-items; 'Click here to add new program eligibility details' points to the 'Add Eligibility' button; 'Click here to add new reimbursability details' points to the 'Add Reimbursability' button; 'Click here to display Financial information related to agency services, child eligibility, payments and benefits.' points to the Financial tab; 'Click here to display information related to eligibility/reimbursability, Medicaid eligibility, adoption subsidies, and CRIS-E.' points to the Eligibility sub-tab; and 'Click here to search and select the child for whom you want to view eligibility and reimbursability details.' points to the Person Search button.

Click here to determine a client’s eligibility for federally funded programs under Title IV-E and to view or update Medicaid and HMO reimbursement

Click here to view adoption subsidies.

Click here to view Medicaid eligibility details.

Click here to view CRIS-E details.

Click here to add new program eligibility details.

Click here to add new reimbursability details.

Click here to display Financial information related to agency services, child eligibility, payments and benefits.

Click here to display information related to eligibility/reimbursability, Medicaid eligibility, adoption subsidies, and CRIS-E.

Click here to search and select the child for whom you want to view eligibility and reimbursability details.

Home | Intake | Case | Provider | **Financial** | Administration

Services | **Eligibility** | Payment | Benefits | help

Eligibility/Reimbursability

- Adoption Subsidy
- Medicaid Eligibility
- CRIS-E Inquiry

Child Selection

Person Search

Person ID: 3211 /
Name: Slate (AD), Rockette
Case ID: 16411

Program Eligibility

	Custody Date	Determination Type	Status	IV-E Eligibility	Effective Date	Termination Date
view	05/11/2005	Initial	Complete	Yes	05/11/2005	

Add Eligibility

Program Reimbursability

	Custody Date	Reimbursability Type	Status	IV-E Reimbursable	Effective Date	End Date
view	05/11/2005	Initial	Complete	Yes	05/11/2005	

Add Reimbursability

How to determine IV-E foster care maintenance eligibility

As an eligibility specialist, you use Ohio SACWIS to determine a client's eligibility for federally funded programs under Title IV-E. The programs include foster care maintenance (FCM) and adoption assistance (AA) payments for eligible children in temporary or permanent custody of your agency.

1. From the Home screen, click the **Financial** tab, click the **Eligibility** tab, and click the **Eligibility/Reimbursability** link in the menu on the left. The Child Selection screen appears.
2. Click **Person Search**, then locate and select the child whose eligibility you want to view.
3. Click the **edit** link to complete an existing eligibility record

that's in "Pending" status, or click **Add Eligibility** to create a new eligibility determination record. The Eligibility screen appears.

4. Complete these fields if necessary: **Determination Type**, **Effective Date**, **Eligibility Month**.
5. Click links to **View Requirements 1-6** and **View Requirements 7-9**. Complete required fields and click **Save**. You are returned to the Initial Reimbursability screen.
6. Click **Determine Reimbursability**. The system processes the reimbursability rules, then displays the result.
7. Click **Save** to accept this determination. The system displays a dialog box asking you to confirm the action.
8. Click **OK** to save this determination and freeze the record from further updates. Or click **Cancel** to stop the action.

Click here to select the type of eligibility determination. The system defaults to Initial. You can select another type if an initial record already exists.

OHIO SACWIS TRN_P home search help & training switch profiles log off
Logged In: Weaver, Sam [Franklin County Children Services Board]

Financial > Eligibility > Eligibility/Reimbursability

Person ID: 32117 Child's Name: Slate (AD), Rockette Case ID: 16411
Eligibility ID: 16473 Creation Date: 06/07/2007 Status: Pending IV-E Eligible: Not Determined

Eligibility Details

Determination Type: * Initial Effective Date: * [] []
Eligibility Month: * [] Termination Date: [] []

Initial Program Eligibility

Requirements 1 to 6

1. The child is a citizen or a qualified alien.	Incomplete
2. Legal responsibility was obtained.	Incomplete
3. Best interest was obtained in the appropriate time frame.	Incomplete
4. Reasonable efforts were obtained in the appropriate time frame.	Incomplete
5. The child met the age requirement.	Incomplete
6. The child was living with the specified relative within the eligibility month or in the previous six months.	Incomplete

[View Requirements 1 to 6](#)

Requirements 7 to 9

7. The child met the deprivation requirement.	Incomplete
8. The income available to the child was less than the July 1996 ADC need standard.	Incomplete
9. The resources available to the SFU were equal to or less than \$10,000.	Incomplete

[View Requirements 7 to 9](#)

Comments: []

How to determine IV-E adoption assistance eligibility

When you receive a completed application for a IV-E Adoption Assistance (AA) subsidy, you use Ohio SACWIS to determine whether the family is eligible to receive the subsidy. When the system determines a child's eligibility, it checks to see that certain criteria are met.

1. From the Home screen, click the **Financial** tab, click the **Eligibility** tab, and click the **Adoption Subsidy** link in the menu on the left. The Adoption Subsidy Program screen appears.
2. Click **Person Search**, then locate and select the child whose subsidy history you want to view.
3. Click **Provider Search** and locate and select the adoptive parents. You must select a provider before you can add a subsidy request.
4. Select **AA** in the **Subsidy Type** field.
5. Click **Add Subsidy**. The system displays the Adoption Assistance Subsidy screen.
6. Complete all required fields.
7. Click the **Special Needs Criteria** link and indicate any special needs the child may have.
8. Click the **Eligibility Requirements** link and indicate any qualifications, including ADC relatedness determination.
9. Click **Save**. You are returned to the Adoption Assistance screen. Then click **Determine Eligibility**. The system responds with a determination decision and date.

The screenshot shows the 'Adoption Subsidy Program' screen in the Ohio SACWIS system. The navigation tabs at the top are Home, Intake, Case, Provider, **Financial**, and Administration. Under the 'Financial' tab, there are sub-tabs for Service, **Eligibility**, Payment, and Benefits. A 'help' link is visible in the top right corner.

On the left side, there is a menu with the following links: [Eligibility/Reimbursability](#), **[Adoption Subsidy](#)**, [Medicaid Eligibility](#), and [CRIS-E Inquiry](#). Callouts point to these links with the following instructions:

- Click here to determine eligibility for IV-E adoption assistance.** (points to **Adoption Subsidy**)
- Click here to locate and select the adoptive parents.** (points to **Provider Search**)
- Click here to edit an existing adoption subsidy.** (points to the **edit report** link in the Subsidy History table)

The main content area is titled 'Adoption Subsidy Program' and includes the following sections:

- Person Search:** A button to search for children.
- Child Information:** Name: Beth, Amber; Age: 6; Person ID: 16347; Case ID: 15395.
- Provider Search:** A button to search for providers.
- Provider Information:** Provider Name: Green, Patty & Green, George; Provider ID: 33066.
- Subsidy History:** A table with columns: Subsidy Type, Adoptive Parent, Application Date, Agreement / Approval Date, Status, Effective Date, End Date, and a delete link.

	Subsidy Type	Adoptive Parent	Application Date	Agreement / Approval Date	Status	Effective Date	End Date	
edit report	Adoption Assistance	Green, Patty & Green, George	03/15/2006		Pending			delete
- Add Subsidy:** A button to create a new subsidy. Callout: **Click here to create a new subsidy.**
- Review History:** A table with columns: Status, Subsidy Type, Current Amount, Review Date, Renewed Eligibility Date, and Termination Date.

	Status	Subsidy Type	Current Amount	Review Date	Renewed Eligibility Date	Termination Date
				04/13/2006		
- Add Review:** A button to create a new review. Callout: **Click here to create a new review.**

How to view Medicaid, HMO, and MMIS histories and record information

A Medicaid record is automatically created in the Medicaid Management Information System (MMIS) and in Ohio SACWIS when a child is determined eligible for FCM or AA reimbursements under Title IV-E. The system also allows you to record a child's enrollment in a health maintenance organization (HMO), which sends the information to MMIS.

1. From the Home screen, click the **Financial** tab, click the **Eligibility** tab, and click the **Medicaid Eligibility** link in the menu on the left. The Medicaid Eligibility screen appears.
2. Click **Person Search**, then locate and select the child whose

Medicaid eligibility you want to view. After you select the child, the screen displays histories of the Medicaid, HMO, and MMIS records.

3. To view the details of a record, click the **view** link. To edit a record in "Pending" status, click the **edit** link. Or, to add a new application, click **Add Application**. The Medicaid Application screen appears. Complete the fields on this screen and click **Save**.
4. To add a new HMO Enrollment record, click **Add HMO Enrollment**. The HMO Enrollment Information screen appears. Complete the fields on this screen and click **Save**.

The screenshot shows the 'Financial' tab selected, with the 'Eligibility' sub-tab active. The left sidebar contains a menu with 'Medicaid Eligibility' highlighted. The main content area includes a 'Child Selection' section with a 'Person Search' button, a 'Medicaid Application History' table, a 'Medicaid Eligibility History' table, an 'HMO Enrollment History' table, and an 'MMIS HMO History' table. Callouts point to various elements: 'Click here to display Financial information related to agency services, child eligibility, payments and benefits.' points to the 'Financial' tab; 'Click here to display information related to eligibility/reimbursability, Medicaid eligibility, adoption subsidies, and CRIS-E.' points to the 'Eligibility' sub-tab; 'Click here to search and select the child for whom you want to view Medicaid, HMO, and MMIS histories.' points to the 'Person Search' button; 'Click here to view Medicaid eligibility, HMO, and MMIS details.' points to the 'Medicaid Eligibility' link in the sidebar; 'Click here to add new Medicaid application details.' points to the 'Add Application' button; and 'Click here to edit HMO enrollment details.' points to the 'Add HMO Enrollment' button.

How to view a child’s CRIS-E information

The system allows you to initiate a CRIS-E inquiry for a child in the custody of a IV-E agency. This inquiry allows you to view a side-by-side comparison of information in the CRIS-E and Ohio SACWIS databases and ensure that information is accurate in both systems. From Ohio SACWIS you cannot view all of the CRIS-E details, just enough to help you determine a child’s Title IV-E eligibility.

1. From the Home screen, click the **Financial** tab, click the **Eligibility** tab, and click the **CRIS-E Inquiry** link in the menu on the left. The CRIS-E Data Inquiry screen appears.
2. Click **Child Search**, then locate and select the child whose

CRIS-E case information you want to view.

3. To view case member details, click the **view** link for the case member. The CRIS-E Demographics screen appears.
4. Click the **Financial** tab to view financial details in CRIS-E, including the case member’s employment history, unearned income, and assets.
5. Click the **Additional** tab to view other details in CRIS-E, including the case member’s citizenship, school information, deprivation statement, and intentional program violation indicator.
6. Click **Close** to return to the CRIS-E Case Information screen.
7. Click **Exit Window** to close the CRIS-E window.

The screenshot shows the Ohio SACWIS interface. At the top, there are navigation tabs: Home, Intake, Case, Provider, **Financial**, and Administration. Under the **Financial** tab, there are sub-tabs: Service, **Eligibility**, Payment, and Benefits. On the left side, there is a menu with links: Eligibility/Reimbursability, Adoption Subsidy, Medicaid Eligibility, and **CRIS-E Inquiry**. The main content area is titled "CRIS-E Data Inquiry" and contains a "Child Search" button. Below the button, there are input fields for Name, Person ID, DOB, and SSN. To the right of these fields, there are labels for Title IV-E #, CRIS-E Recipient ID, and CRIS-E Case #. A "help" link is visible in the top right corner of the main content area.

Click here to view CRIS-E case, demographic, financial, and other information for a child. (Callout pointing to the **CRIS-E Inquiry** link in the left menu)

Click here to initiate a CRIS-E inquiry for a child in the custody of a IV-E agency. (Callout pointing to the **Child Search** button)

Click here to display Financial information related to agency services, child eligibility, payments and benefits. (Callout pointing to the **Financial** tab)

Click here to display information related to eligibility/reimbursability, Medicaid eligibility, adoption subsidies, and CRIS-E. (Callout pointing to the **Eligibility** sub-tab)

Chapter 11

Adoption Services

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Adoption Services

An adoption case is created when an agency is granted permanent custody of a child and seeks to find an adoptive home for the child. The adoption case includes only the adoptive child(ren) and allows you to track the activities related to adoptive cases, for example, recruitment, case plans, Ohio Adoption Photo Listing (OAPL) registration, the child study inventory, adoptive placement, and finalization. An adoption case may have more than one child if the children are being adopted together.

Case plan

When you create an adoption case, the system copies the case plan to the new adoption case when the case plan meets these criteria:

- The child(ren) selected for the adoption case are the only participants in the case plan
- The case plan type is “Proposed”
- The case plan status is “Approved”
- The child’s permanency planning goal is “Adoption”

Other records

The system maintains links from the new adoption case to the following existing records for that child:

- Person profile, including the child’s current legal status and legal status history
- Medical profile
- Education profile
- Eligibility record
- Services
- Placement history and current placement record
- Removal information

Closed adoption cases

The case is closed when the adoption is finalized and all relevant information has been completed. When the supervisor approves the closing and sealing of the adoption case, the system does the following:

- Applies the provider’s address to the address on each child’s person profile.
- Adds the child to the adoptive provider as a new child household member, with member type “Permanent.” The effective date is the journalized date for adoption finalization.
- Creates a new person profile record for the adopted child, with a new person ID number, and with a link to the original person profile and person ID. The system restricts access to the adoption record of that child. Only workers with the appropriate security profile may access the child’s original adoption case and person profile.
- Displays an indicator that the child displayed through a person search was adopted, and that a case displayed in a case search is an adoption case.
- Restricts access to the child’s adoptive name, person profile, adoptive placement record, and adoption case to workers with a select security profile.

This chapter explains:

- How to view adoption case details
- How to create an adoption case
- How to record recruitment activities
- How to record a child study inventory facesheet
- How to search for adoptive families
- How to record pre-adoptive staffing details
- How to record a matching conference
- How to record an adoptive placement decision
- How to record a finalization checklist
- How to secure and close an adopted child’s record

How to view adoption case details

When an agency is given permanent custody of a child, the process begins for finding an adoptive home for that child. An adoption case is created to record the details.

1. From the Home screen, click the **Case** tab.
2. Click **Workload**. The Case Workload screen appears.
3. Click your name.
4. Click the case number ID link for the adoption case you want to view. The Case Overview screen appears.
5. Click the **View Member Details** link in the Case Actions area to view the child(ren) in the case. The Case Member Information screen appears.
6. Click each of the links to view additional information:

Adoption Details, Child Study Inventory, Adoption Subsidy, Medicaid Eligibility, and ICPC/ICAMA.

7. Click **Cancel** to return to the previous screen.
8. Click the **Placement/Finalization/Case Closure** tab. The Adoption/Placement/Finalization Information screen appears.
9. Click the **edit** or **view** link to view details about the child's adoptive placement and adoption case finalization. The Adoption Placement/Finalization Details screen appears.
10. Click **Cancel** or **Close** to return to the previous screens. Click the **Access Original Case** link to view the child's original case with the birth parents.

Click here to view whether adoption placement and finalization activities have been completed.

Case > Workload > Case Overview

Members	Placement/Finalization/Case Closure
Case ID: 15395 Case Name: Beth, Aber	Case Status: Open Case Category: Adoption

Case Member Information

Name	Person ID	DOB	Age	Gender	Permanent Custody Date
Beth, Amber	16347	11/14/1999	62	Female	01/01/2006

[Adoption Details](#) |
 [Child Study Inventory](#) |
 [Adoption Subsidy](#) |
 [Medicaid Eligibility](#) |
 [ICPC/ICAMA](#)

Click here to view details on this case member.

Click here to view details about recruitment activities, siblings, birth parents, and adoption subsidies.

Click here to view child study inventory (CSI)/ facesheets that have been recorded for a child.

Click here to view details about adoption subsidies.

Click here to view a summary of the child's Medicaid eligibility determinations.

Click here to view details about interstate transfers.

How to create an adoption case

When your agency is given permanent custody of a child, you can create an adoption case for the child and begin recording the details of the adoption process. You can also select a child from another open case and add that child to this adoption case if your agency must have permanent custody of that child before the adoption process can proceed.

1. From the Home screen, click the Case tab.
2. Click Workload. The Case Workload screen appears.
3. Click your name.
4. Click the case number ID link for the adoption case you want to view. The Case Overview screen appears.
5. Click the Adoption link in the menu on the left. The Child

Members screen appears.

6. Select the check box next to each child who is a member of the new adoption case. Also select one of the children in the Case Reference Person field.
7. Click Create Adoption Case. The system displays a dialog box explaining that the child(ren) you selected will be removed permanently from the original case.
Note: Creating an adoption case cannot be reversed.
8. Click OK to create the adoption case. The New Adoption Case Details screen appears.
9. Click Worker Assignment to assign the new adoption case to an adoption worker.

Click here to display the Case Workload screen.

Select the check box next to each child who is a member of the new adoption case.

Click here to create an adoption case and display the Child Members screen.

Click here to create a new adoption case. Note that this cannot be reversed.

Click here to associate the child(ren) in an existing adoption case.

Name	Gender	DOB
<input type="checkbox"/> Whitley, Sam	Male	02/02/2002
<input type="checkbox"/> Whitley, Sally	Female	03/12/1999

How to record recruitment activities

As part of the adoption case actions, you record the activities the agency has taken to recruit adoptive families for the child(ren) in the adoption case.

1. From the Home screen, click the **Case** tab. The Case Workload screen appears.
2. Click the case ID number link for the adoption case you want to update. The Case Overview screen appears.
3. Click the **View Member Details** link in the Case Actions area. The Case Member Information screen appears.
4. Click the **Adoption Details** link for the child for whom you are recruiting an adoptive family. Recruitment details are recorded separately for each child. The Recruitment

Activity Information screen appears.

5. Click the **edit** link next to the recruitment activity you want to update. The Activity Description Details screen appears.
6. In the **Describe** narrative field, enter a detailed description of the specific actions taken.
7. Click **Save**. You are returned to the Recruitment Activity Information screen.
8. Click **Save**. You are returned to the Case Member Information screen. If you completed the same activity for more than one child in this case, repeat steps 4-7 for each child.

Click here to add or update sibling information and visitation plans.

Click here to review or update birth parent information.

Click here to review a child's eligibility for adoption subsidies.

Recruitment	Siblings	Birth Parents	Adoption Subsidy
Person ID: 16347	Name: Beth, Amber	DOB: 11/14/1999	Age: 6
Recruitment Activity Information			
Activity	Description		
Potential Adoptive Family Identified	edit		
Flyers	edit		
Television Spots	edit		
Radio Spots	edit fasa		
Adoption Resource Exchange	edit Regional Exchange: National Exchange:		
Adoption Picnic, Fair, Events	edit		
Locating Extended Family	edit		
Locating Interested Non-Relative(s)	edit		
OAPL Registration	Registration Date: 01/20/2006 Last Updated Date: OAPL #: 01234	Child was registered in OAPL this date and I am documenting this here as it is done outside of the S	
Own Agency Website	edit		
AdoptOHIO Website	edit		
AdoptUSKids Website	edit		
Notified Caregiver(s) that Child is Available for Adoption	edit The Foster Care Provider has been notified that the agency has received PC of the child and is free		
Other	edit		

Click here to update recruitment activity details.

How to record a child study inventory facesheet

A child study must be completed periodically for every adoptive child. You complete the child study according to the practices of your agency. In Ohio SACWIS, you must record only the facesheet, which provides a convenient listing of the medical resources and the items that will be given to the adoptive parents at placement.

1. From the Home screen, click the **Case** tab.
2. Click **Workload**. The Case Workload screen appears.
3. Click your name.
4. Click the case number ID link for the adoption case you want to view. The Case Overview screen appears.

5. Click the **View Member Details** link in the Case Actions area. The Case Member Information screen appears.
6. Click the **Child Study Inventory** link for the child you're interested in. The Child Study Inventory Facesheet screen appears.
7. Click the **edit** link for the facesheet you want to view, or click **Add CSI Facesheet** to record a new facesheet. The Child Study Inventory Details screen appears.
8. Select the applicable check boxes and complete the applicable narrative fields on this screen.
9. Click **Save**. You are returned to the Child Study Inventory Facesheet screen.
10. Click **Close** on the next two screens to return to the Case Overview screen.

Enter the date this facesheet is completed here. A child's case can have only one "initial" CSI facesheet record.

Click here to select the check box next to each item that was provided to the adoptive parents. You can select more than one box. If you select **Other**, enter a detailed description below.

Enter a detailed description of the child's needs here.

Click here to select the check box next to each item that will be provided to the adoptive parents at placement. If you select **Other**, enter a detailed description below.

How to search for adoptive families

When you conduct a search for adoptive families, the system locates an adoptive family whose service type and other criteria match the needs and characteristics of the adoptive child you select on this screen. You match providers for one child at a time. Once the potential adoptive families have been identified, you record a pre-matching decision.

1. From the Home screen, click the **Case** tab.
2. Click **Workload**. The Case Workload screen appears.
3. Click your name.
4. Click the case number ID link for the adoption case you want to view. The Case Overview screen appears.
5. Click the **Potential Adoptive Families** link in the menu on the left. The Potential Adoptive Families screen appears.
6. Select the child's name in the **Child Name** field, and click **Search Families**. The Provider Match screen appears.
7. Enter the adoptive family criteria. You must complete the **Agency** field. **Service Category** and **Service Type** fields are already completed.
8. Click **Search** to display the Provider Match Search Results.
9. Click **OK**. The Potential Adoptive Families screen appears.
10. Click the child name link. The child's match history displays the search you just conducted.
11. Click the **View Results** and **View Criteria** links to display further details.
12. Click **Close** to return to the previous screen.

Click here to display the Case Workload screen.

Click here to display the child's match history for the search you requested.

Click here to display the Potential Adoptive Families screen.

Select the child's name and click here to display the Provider Match screen.

Click here to view a summary of the criteria used in the search.

Click here to view all of the adoptive family matches found in the search.

Search Date	View Criteria	View Results
02/07/2006 09:27 AM	View Criteria	View Results
01/24/2006 09:43 AM	View Criteria	View Results
01/23/2006 17:08 PM	View Criteria	View Results
01/19/2006 13:50 PM	View Criteria	View Results

How to record pre-adoptive staffing details

An initial pre-adoptive staffing conference is a formal meeting scheduled soon after the agency is granted permanent custody of a child. The conference includes workers on the child's original case, and the child's adoption case, as well as other invitees who plan the transfer of the case.

1. From the Home screen, click the Case tab.
2. Click Workload. The Case Workload screen appears.
3. Click your name.
4. Click the case number ID link for the adoption case you want to view. The Case Overview screen appears.
5. Click the Placement Decision/Staffing link in the menu on

the left. The Placement Decision Process screen appears.

6. Click the child name link. A table displaying each pre-adoptive staffing record appears.
7. Click the edit or view link next to the record you want to view. The Pre-adoptive Staffing Participants screen appears.
8. Click the following tabs and complete the fields on these screens; Child Adoptive Information, Child Needs, Pre-Adoptive Staffing Summary, and JFS01690.
9. Click Save. You are returned to the Placement Decision Process screen.

Enter the date on which the initial pre-adoptive staff meeting is scheduled to be held.

Click here to select the participants who are invited to a pre-adoptive staffing conference.

Click here to add or update special needs that apply to this child and sibling information.

Click here to add or update any particular needs this child has, including ethnicity considerations.

Click here to add or update a summary of the pre-adoptive staffing meeting's outcomes.

Click here to generate the JFS01690 report and send it to participants of the pre-adoptive staffing meeting.

Case > Workload > Placement Decision/Staffing

Pre-Adoptive Staffing Participants Adoptive Child Information Child's Needs Pre-Adoptive Staffing Summary JFS 01690 Distribution

Case ID: 15395 Status: Open
 Name: Beth, Aber Category: Adoption

Pre-Adoptive Staffing Participants

Date of Initial Pre-Adoptive Staffing: * 02/12/2006

Child Name: Date of Update/Review:

Persons Invited to Attend Initial Pre-Adoptive Staffing

Name	Role	Agency/Organization	Attended Staffing
Add Participant			

How to record a matching conference

The matching conference is a formal meeting in which representatives of the agency and others examine how well matched a child and adoptive family are. You first record when the conference is scheduled, and then you update the record to show the results of the conference.

1. From the Home screen, click the Case tab.
2. Click Workload. The Case Workload screen appears.
3. Click your name.
4. Click the case number ID link for the adoption case you want to view. The Case Overview screen appears.
5. Click the Placement Decision/Staffing link in the menu on the left. The Placement Decision Process screen appears.
6. Click the Matching Conference link. The Placement Decision Process screen displays.
7. Click the edit link or click Add Matching Conference to create a new record. The Matching Conference Planning Information screen appears. Complete the required fields and click Save.
8. Click Add Participant to identify the participants invited to the matching conference. The Match Conference Participant Details screen appears.
9. Complete the required fields and click OK. The Match Conference Planning Information screen appears.
10. Click the Families Considered tab and complete the required fields. Click Save to return to the Match Conference Planning Information screen.

The screenshot shows the 'Match Conference Planning' screen with the following fields and annotations:

- Match Conference Planning Information:**
 - Case ID: 15395
 - Name: Beth, Aber
 - Status: Open
 - Category: Adoption
 - Date Scheduled: * 02/12/2006 (with calendar icon)
 - Date Occurred: (with calendar icon)
 - Child to be Matched: Beth, Amber
 - Siblings to be Included: (checkbox)
- Persons Invited to Attend:**

Name	Role	Agency/Organization	Attended conference
Add Participant			

Annotations with arrows pointing to specific elements:

- Enter the date on which the matching conference is scheduled.** (points to Date Scheduled)
- Select the check box next to each sibling on this adoption case who was also considered in this matching conference.** (points to Siblings to be Included)
- Click here to select the participants who attended a pre-adoptive staffing conference.** (points to Add Participant button)
- Click here to add or update the adoptive families who have been considered during the adoption process.** (points to Families Considered tab)
- Click here to add or update the adoptive placement options, including families selected from matching conferences.** (points to Placement Decision tab)
- Enter the date on which the matching conference occurred.** (points to Date Occurred)

How to record an adoptive placement decision

Once the matching conference is complete, the agency selects a family with which to place the child(ren).

1. From the Home screen, click the Case tab.
2. Click **Workload**. The Case Workload screen appears.
3. Click your name.
4. Click the case number ID link for the adoption case you want to view. The Case Overview screen appears.
5. Click the **Placement Decision/Staffing** link in the menu on the left. The Placement Decision Process screen appears.
6. Click the **Matching Conference** link. The Child Selection for

Adoption Match Conference screen displays.

7. Click the **edit** link for the conference on which the placement decision is based. The Match Conference Planning Information screen appears.
8. Click the **Placement Decision** tab. The Placement Decision screen appears.
9. Click the **Family Response** link. The Family Response Details screen appears. Complete the fields on this screen.
10. Click **OK**. You are returned to the Placement Decision screen.
11. Complete the two narrative fields on this screen.
12. Select the **Matching Conference Completed** check box.
13. Click **Save**. You are returned to the Placement Decision Process screen on the Matching Conference tab.

Click here to add or update details of the matching conference, including date held, siblings included, and participants.

Click here to add or update the adoptive families who have been considered during the adoption process.

Click here to add or update the adoptive placement options, including families selected from matching conferences.

Case > Workload > Placement Decision/Staffing > Matching Conference

Match Conference Planning	Families Considered	Placement Decision
Case ID: 15395 Name: Beth, Amber	Status: Open Category: Adoption	
<p>Placement Decision</p> <p>Date Matching Conference Occurred: _____ Child(ren) to be Matched: Beth, Amber</p>		
<p>Families Selected</p> <p>First Choice: None Second Choice: None Third Choice: None Fourth Choice: None</p>		
<p>Additional Considerations/Components Central to Placement Option Selected:</p> <div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <p style="text-align: center;">Spell check</p>		
<p>Summarize Outcome of Matching Conference:</p> <div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <p style="text-align: center;">Spell check</p>		
<p><input type="checkbox"/> Matching Conference Completed</p>		

Enter narrative text here describing any other considerations or components that affected the adoptive placement selected.

Enter narrative text here summarizing the results of the matching conference.

How to record a finalization checklist

On the child's adoption case, you keep track of the activities and events by maintaining a short finalization checklist. This checklist is a simple reference to the status of the adoption. When the adoption is actually finalized, you record the court ruling and the change to the child's legal status in the system.

1. From the Home screen, click the **Case** tab.
2. Click **Workload**. The Case Workload screen appears.
3. Click your name.
4. Click the case number ID link for the adoption case you want to view. The Case Overview screen appears.
5. Click the **View Member Details** link in the Case Actions area. The Case Member Information screen appears.
6. Click the **Placement/Finalization/Case Closure** tab. The Adoption Placement/Finalization Information screen appears.
7. Click the **edit** link for the child whose finalization information you want to update. The Adoption Placement/Finalization Details screen appears.
8. In the Finalization Checklist area, select the check box next to each activity that is completed.
9. Click **Save**. You are returned to the Adoption Placement/Finalization Information screen. If all of the finalization checklist items have been checked, the summary table on this screen indicates the checklist is complete.
10. Click **Close** to return to the Case Overview screen.

The screenshot shows the 'Adoption Placement/Finalization Details' screen for Case ID 15395, Case Name Beth, Aber. The screen is divided into several sections:

- Child's Pre-Adoptive Information:** Name: Beth, Amber; SSN: 435456644; Address: 1120 Morse Rd RD Columbus, OH 43229. A 'Copy to Adoptive Information' button is present.
- Child's Adoptive Information:** First Name: Amber; Middle Name: ; Last Name: Beth; Suffix: ; SSN: 1231123145; Address: .
- Adoption Placement Information:** Subsidy Eligibility Determined: Ineligible; Adoption Subsidy Agreement Date: ; CSI Updated Date: 01/23/2006; Adoptive Homestay Last Updated: ; Date Withdrawn from OAPL: 01/25/2006; N/A checkbox; Adoption Placement Agreement Date: 01/25/2006; Social/Medical History Completed (JFS 01616): 01/25/2006; Date Adoption Info. Disclosure Signed (JFS 01667): 01/25/2006.
- Finalization Checklist:** Petition to Adopt: ; Adoption Finalization Date: ; Signed Consent to Adopt: ; Pre-Finalization Report Completed: ; Court Packet Completed: ; Final Decree: ; Primary Factor for Special Need Determination: Other.

Annotations on the screenshot include:

- A callout pointing to the 'Copy to Adoptive Information' button: "Click here if the child's name and social security number are the same."
- A callout pointing to the 'Adoption Placement Information' section: "Enter specific dates for adoption placement information here."
- A callout pointing to the 'Child's Adoptive Information' section: "Enter the child's first and last adoptive names if different from the names on the original case."
- A callout pointing to the 'Finalization Checklist' section: "Select the check box next to each item that was completed."

How to secure and close an adopted child's record

Once the finalization decision has been recorded, you secure the record of each adopted child in the adoption case. At the end of this process, the adopted child is given a new person ID, and the child's original person profile and case are restricted.

1. From the Home screen, click the Case tab.
2. Click Workload. The Case Workload screen appears.
3. Click your name.
4. Click the case number ID link for the adoption case you want to view. The Case Overview screen appears.
5. Click the View Member Details link in the Case Actions

area. The Case Member Information screen appears.

6. Click the Placement/Finalization/Case Closure tab. The Adoption Placement/Finalization Information screen appears.
7. Click the **Validate Adoption Case Closure** link above the summary table. The system ensures the adoption case is complete and displays any missing information on the Adoption Case Closure Validation Details screen.
8. If all items are resolved, click **Process Approval** to submit the case for supervisory approval.
9. Complete any missing information, then click **Close** to return to the previous screen.
10. Once the case passes validation, click the **security approval** link. The system submits the case for supervisory approval.

Click here to add or update the composition of the adoptive family and the parents' marital information.

Click here to display the Adoption Placement/Finalization Information screen.

Click here to edit details for a child in the adoption case.

Click here to add details regarding a child in the adoption case.

Case > Workload > Case Overview

Members | **Placement/Finalization/Case Closure**

Case ID: 15395 | Case Status: Open
Case Name: Beth, Aber | Case Category: Adoption

Adoption Placement/Finalization Information

Child Name	Placement Information Completed	Finalization Checklist Completed
Beth, Amber	N	N

[Validate Adoption Case Closure](#)

Add Adoption Placement

Chapter 12

Staff Management

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Staff Management

Staff management involves performing a variety of supervisory tasks.

About staff management

As a supervisor, you will use primarily two areas in Ohio SACWIS to perform the tasks related to managing the work of the staff in your unit:

- **Home tab.** From this tab you manage daily work items of your staff. You view your ticklers, as well as the ticklers of the workers you supervise. You view and address approval requests on such work items as intakes, assessments, case plans, recruitment plans, and so on. You also manage worker assignments and case transfers.
- **Administration tab.** From this tab you perform the tasks that are related to worker information. This includes on-call worker assignments, a worker's personal and employment information, worker training plans, and the assignment of supervisory delegates. You also go to this tab to generate standard reports.

This chapter explains:

- How to view and process pending approvals
- How to view worker information
- How to view worker assignments
- How to view a history of worker assignments on a case
- How to record a worker's job role
- How to view or record on-call workers
- How to assign a work item or workload
- How to close a worker assignment
- How to record a supervisory delegate
- How to view a worker's training history
- How to record competency information
- How to record a worker's training plan

How to view and process pending approvals

Work items that require approval are displayed on the Pending Approvals screen. As a supervisor, you review this list to see the new approvals awaiting your review. As a worker, you review the list to monitor the status of each work item in the approval process.

1. From the Home screen, click the **Approvals** tab. The Pending Approvals screen appears.
2. Click the work item category link or the plus sign to view the work items. This opens a table, which lists the work tasks in that category and the status.

3. Click the link in the Task column to view the details of the work item.

The screenshot shows the 'Pending Approvals' section of the application. It features a navigation bar at the top with tabs for Home, Intake, Case, Provider, Financial, and Administration. Below this, there are sub-tabs for Desktop, Approvals, and Assignments. The main content area is titled 'Pending Approvals' and contains three expandable sections: 'Needs Approval', 'Case Review', and 'Justification / Waiver'. The 'Needs Approval' section is expanded, showing a table with columns for Status and Task. The 'Case Review' section is also expanded, showing a table with columns for Status, Task, and a link labeled 'recal /reroute'. The 'Justification / Waiver' and 'Safety Assessment' sections are collapsed. Callouts with arrows point to specific elements: 'Click here to view tasks requiring approval and their status.' points to the 'Needs Approval' section header; 'Click on the link to open the record.' points to the 'recal /reroute' link; 'Click here to display work items pending approval.' points to the 'Approvals' sub-tab; and 'Click here to modify this work item.' points to the 'recal /reroute' link.

Status	Task
04/04/2006 Pending Approval	[8016510] Lake, Constance - [8015243]
03/28/2006 Pending Approval	[8016410] Stone(FM), Wilma - [8015761]

Status	Task	
03/28/2006 Pending Approval	[8016410] Stone(FM), Wilma - [8015761]	recal /reroute

How to view worker information

Ohio SACWIS is used to maintain certain information about ODJFS workers.

1. Click the **search** header link at the top of the Home screen. The Ohio SACWIS Search screen appears.
2. Click the **Employee Search** tab. The Employee Search screen appears.
3. Enter search criteria. The quickest way to locate the worker's record is to enter the Employee ID number. If you don't have that, you can search by the worker's name, education level, and so on.
4. Click **Search**. The worker records that match your search criteria appear in the Employee Search Results table.
5. Click the **select** link next to the Person ID. The system displays the Employee Information screen of the worker's record. It displays the worker's county ID, email address, employment dates, and current job assignment(s).
6. Click **Job History** to view a summary of the worker's job assignments, dates, supervisors, and so on.
7. Click **BCI** to view the results of background checks.
8. Click **Demographics** to view the worker's education level, gender, languages, race, and ethnicity.
9. Click **Licenses** to view the worker's professional licenses.
10. Click **Cancel** to return to the previous screen.

Click here to view a summary of the worker's job assignments, dates, and so on.

Click here to view results of background checks.

Click here to view a worker's education level, gender, and so on.

Click here to view details of a worker's license.

Select this check box to record a worker leave or suspension.

Select this check box to record participation in the University Partnership Program.

Click here to edit details of the worker's current job.

Click here to add a new job for this worker.

Select this check box to record or clear a worker termination flag.

Select this check box to record a supervisor override.

Select this check box to record a waiver of first year requirements.

Administration » Staff » Maintain Staff

Employee Name: Weaver, Sam Employee ID: 16183

Basic Job History BCI Demographics Licenses

Employee Information

Employee ID (County): SMW Email Address: SACWIS_Training@odjfs.state.oh

Hire Date: * 01/31/1991

On Leave Indicator Termination Termination Date:

University Partnership Program Supervisor Over-Ride

First Year Requirement Waived

Start Date	End Date	County	Agency	Unit	Supervisor	Job Title
edit 01/03/2006		Franklin	Franklin County Children Services Board	Administration Unit	Stammler, George Charles	QA Reviewer

How to view worker assignments

View worker assignments as follows:

1. From the Home screen, click the **Case** tab at the top of the screen. The Case Workload screen appears. It lists each worker in your unit.
2. If necessary, you can select the worker's name in the **Assignments for** field, then click **Show**.
3. Click the plus sign next to the worker name link. The screen displays the cases that are assigned to that worker.

The screenshot shows the 'Case' tab selected in the top navigation bar. Below the navigation bar, there are tabs for 'Desktop', 'Approvals', and 'Assignments'. The 'Assignments' tab is active. The main content area is titled 'Work Assignments' and contains a dropdown menu for 'Assignments for:' set to 'Self' and a 'Show' button. Below this, a list of workers is displayed, each with a checkbox, a name link, and role information. Callouts point to specific elements: 'Select the worker whose staff assignments you want to view.' points to the 'Assignments for:' dropdown; 'Click here to view the items assigned to the worker.' points to the plus sign next to 'Weaver08, Sam (8016183)'; 'Click here to open the record.' points to the name link 'Weaver08, Sam (8016183)'; 'Click here to edit the worker's role on the assignment.' points to the 'edit' link for 'Slate (AD)08, Rockette (16670)'; and 'Select the check box then click here to transfer the item to another agency.' points to the checkbox and 'transfer' link for 'Slate (AD)08, Rockette (16670)'. The list of workers includes: Slate (AD)08, Rockette (16670) [Adoption Case Creator]; Rutherford, Mandy (8016391) [Supervisor]; Lampert, Kenneth (8016392) [Supervisor]; Stone(CM), Wilma (8016409) [Supervisor]; Stone(FM), Wilma (8016410) [Supervisor]; Gold08, Sunny S [A/I Worker]; Adams08, John A [Supervisor]; Stone(AD), Wilma (8016411) [Supervisor]; and Stewart08, James R [Supervisor].

How to view a history of worker assignments on a case

From the main case profile screen, you can view a history of workers and supervisors currently or previously assigned to a case.

1. From the Home screen, click the **Case** tab at the top of the screen.
2. Click the **Workload** tab and display your workload. A listing of the cases assigned to you appears.
3. Select the case ID number link for the case you want to view. The Case Overview screen appears.
4. Click the **View Case Information** link in the Case Actions area. The Case Details screen appears.
5. From the Case Details screen, click the **View Assignment History** link. The Assignment History screen appears. It displays the workers' participation dates and other details.
6. Click the **Supervisors** link to view the supervisors who have been assigned to the case.
7. Click **Close**. You are returned to the Case Details screen.
8. Click **Cancel**. You are returned to the Case Overview screen.

The workers assigned to the case appear here.

Click here to display the Assignment History screen and view worker's participation dates.

Case > Workload > Case Information

Case Detail		Members	Relationships	Associated Persons
Case ID:	15117	Case Status:	Open	
Case Name:	Adams, John	Case Category:	Assess/Invest	

Assignment Information

[View Case Status History](#) | [View Assignment History](#)

Worker Name	Role	Agency of Worker
Munaga, Rajasekhar01	Supervisor	Adams County Children Services Board
Munaga, Rajasekhar01	Supervisor	Adams County Children Services Board
Munaga, Rajasekhar01	Supervisor	Adams County Children Services Board
Miller, Duncan	Supervisor	Adams County Children Services Board
Miller, Duncan	Supervisor	Adams County Children Services Board

Primary Caretaker: Secondary Caretaker:

Reference List

Reference Type	Reference Number	Description
Add Case Reference		

How to view or record on-call workers

Each county maintains a list of the dates and times their workers are on-call. (There are no on-call workers at the state level.)

1. From the Home screen, click the **Administration** tab, then click the **Staff** tab. The Staff Information screen appears.
2. Click the **On-Call Employee** link in the menu on the left. The On-Call Employee Search Criteria screen appears.
3. Select the **County** whose on-call worker list you want to view, if outside of your own county.
4. If you want to narrow the search, enter in the **Start Date** and **End Date** fields the date range during which workers

are on-call.

5. Click **Search**. The workers who are currently on call during that time period appear in the On-Call Employee Search Results.
6. To update a worker's on-call details, click the **edit** link. To add a new on-call worker, click **Add On-Call Employee**. The Employee Search screen appears.
7. Enter search criteria, then click **Search**. Click the **select** link next to the employee name. The On-Call Employee Details screen appears.
8. Complete the fields on this screen. You must complete at least the **Start Date** and **Start Time** fields.
9. Click **Save** to return to the previous screen.

Click here to select the county whose on-call worker list you want to view.

Click here to display On-Call Employee Search Criteria.

Enter Start and End Dates during which workers are on-call here.

Click here to initiate the search.

Click here to edit On-Call Employee information.

Click here to add On-Call Employee details.

The screenshot shows the 'On-Call Employee Search Criteria' screen. The navigation tabs at the top are Home, Intake, Case, Provider, Financial, and Administration. Under Administration, there are sub-tabs: Staff, Maintenance, Security, Reports, Training, and Utilities. On the left sidebar, there are links for 'On-Call Employee', 'Maintain Staff', and 'Delegate Assignment'. The main area contains 'On-Call Employee Search Criteria' with a 'County' dropdown menu (currently set to 'Adams County CSB'), 'Start Date' and 'End Date' fields with calendar icons, and a 'Search' button. Below this is the 'On-Call Employee Search Results' section, showing 'Result(s) 1 to 1 of 1' and 'Page 1 of 1'. A table displays the search results:

ID	Name	Phone	Pager	Start Date/Time	End Date/Time
edit 15080	Sutton, Sam	(614) 444-4444		01/03/2006 12:00 A.M.	02/21/2006 12:00 A.M.

At the bottom of the results section, there is an 'Add On-Call Employee' button.

How to assign a work item or workload

When you assign or reassign a work item, you assign ownership to another worker. Work items include intakes, cases, reports, and providers. You can also assign a whole workload or parts of it, if, for example, a worker goes on an extended leave. When the worker receives a new work item, he or she accepts it.

1. From the Home screen, click the **Assignments** tab. The Work Assignments screen appears.
2. In the **Assignments for** field, select the name of the worker whose assignments you want to view, then click **Show**. This person's workload is listed.

3. Click the name link or the plus sign to open the person's list of work items.
4. Click the check box next to the item you want to assign. Click all of the items to assign the whole workload.
5. Click **Assign**. The Assign Work Item screen appears.
6. Click the **select** link next to the person to whom you want to assign the item. The Employee Assignment screen appears.
7. Enter, in the **Start Date** field, the date the assignment begins, then click the check box next to each role the new worker will perform on this work item.
8. Click **Save** to return to the Work Assignments screen.

The screenshot shows the 'Work Assignments' interface. At the top, there are navigation tabs: Home, Intake, Case, Provider, Financial, and Administration. Below these are sub-tabs: Desktop, Approvals, and Assignments. The main content area is titled 'Work Assignments' and includes a dropdown menu for 'Assignments for:' currently set to 'Self', and a 'Show' button. Below this, there is a list of workers with checkboxes and links for 'edit' and 'transfer'. The workers listed are: John, Jeff (15961); Jones, Tina (16049) [Supervisor] [Needs Assignment]; Shaan, Mike [A/I Supervisor]; Hoyt, Blair [Agency Legal Counsel]; Simpkins, Phyllis (16051) [Supervisor] [Needs Assignment]; Shaan, Mike [A/I Supervisor]; Bowling, Brenda (16034) [PlacementWorker, Supervisor, Supervisor] [Needs Assignment]; Shaan, Mike [A/I Supervisor]; and Ball, Carmen [Adoption Case Creator]. At the bottom left, there is an 'Assign' button. Callouts with arrows point to various elements: 'Click here to select who you wish to view assignments for, then click Show.' points to the 'Show' button; 'Select this check box to identify to whom you wish to assign this task.' points to the checkboxes; 'Click here to assign work item(s).' points to the 'Assign' button; 'Click here to transfer this assignment to another worker.' points to the 'transfer' link; 'Click here to edit the work assignment for this worker.' points to the 'edit' link; and 'Click here to assign a work item or workload.' points to the top right corner of the interface.

How to close a worker assignment

If a worker is to be removed from supporting a work item, you can end the worker's assignment as long as there is at least one other worker assigned to the item.

1. From the Home screen, click the **Assignments** tab. The Work Assignments screen appears.
2. In the **Assignments for** field, select the name of the worker whose assignments you want to view, then click **Show**. This person's workload is listed.
3. Click the name link or the plus sign to open the person's list of work items.
4. Click the **edit** link next to the work item name. The Employee Assignment screen appears.

5. Complete the **End Date** field.
6. Write an explanation in the **Comments** field.
7. Click **Save**. You are returned to the Work Assignments screen.

Enter narrative text here explaining the end of the worker's assignment.

Enter the end date for this assignment here.

Employee ID: 15961 Employee Name: John, Jeff

Employee Assignment

Start Date: * 01/24/2006 End Date: []

Comments: Initial Assignment

Roles

Select	Role
<input type="checkbox"/>	A/T Supervisor
<input type="checkbox"/>	A/I Worker
<input type="checkbox"/>	Adoption Case Creator
<input type="checkbox"/>	Adoption Worker
<input type="checkbox"/>	Agency Legal Counsel
<input type="checkbox"/>	Assessment/Investigation Supervisor
<input type="checkbox"/>	Assessment/Investigation Worker
<input type="checkbox"/>	Assessor/Investigator
<input type="checkbox"/>	Case Activity Recorder
<input type="checkbox"/>	Case Linker
<input type="checkbox"/>	Clerical Staff
<input type="checkbox"/>	Home Study Supervisor
<input type="checkbox"/>	ICPC Supervisor
<input type="checkbox"/>	ICPC Worker
<input type="checkbox"/>	Inquiry Decision Maker
<input type="checkbox"/>	Inquiry Worker
<input checked="" type="checkbox"/>	PlacementWorker
<input type="checkbox"/>	Report Disposition Changer

How to record a supervisory delegate

A supervisory delegate makes work item assignments on behalf of a unit supervisor in the agency. (The system does not support cross-agency delegation.) Only a unit supervisor or a worker with a supervisor role may be a delegate.

1. From the Home screen, click the **Administration** tab at the top of the screen, then click the **Staff** tab.
2. Click the **Delegate Assignment** link in the menu on the left. The Current Delegates screen appears. It displays the workers who are currently or have been supervisory delegates in this agency.
3. Click the **edit** link for a worker to update the assignment dates, then go to step 6. Or click **Add Delegate** to add a new

delegate. The Delegate Search screen appears.

4. Enter the delegate's name, then click **Search**. The workers with the name you entered and who can be delegates appear in the search results table.
5. Click the **select** link for the worker you want to assign as a delegate. The Delegate Details screen appears.
6. Enter the dates during which this worker is a delegate. You must complete at least the **Start Date** field.
7. Click **Save**. You are returned to the Delegate Search screen.

Click here to display the Current Delegates screen.

Click here to edit assignment dates.

Click here to display the Delegate Search screen and add a new delegate.

Click here to display Staff tasks.

Click here to display Administrative tasks.

Employee ID	Name	Start Date	End Date
15028	Bandaru, Lalbahadur01	03/07/2006	03/08/2006

How to view a worker's training history

Ohio SACWIS is used to maintain a worker's training plan and the progress toward the goals outlined in the plan. The plan consists of one or more competency areas, tracking skills in Core, Specialized, Related, ODJFS, and Agency-specific areas. One or more courses comprise a competency area. Only one training plan may be open for a worker at a given time.

1. From the Home screen, click the **Administration** tab, then click the **Training** tab. The Competencies screen appears.
2. Click the **Plans** link in the menu on the left. The Employee Search Criteria screen appears.
3. Complete the search criteria and click **Search**. The

Employee Search Results are displayed below.

4. Click the **select** link next to the employee ID, or click **Add Employee**. The Training Plan History screen appears.
5. To view any courses the worker completed as part of the plan, click the plus sign or plan name link, then click the **Record** link. The Training Plan Details screen appears.
6. To view details of a course and competencies it addresses, click the **edit** link next to the course, then click **Cancel** to close the screen.
7. To view plan details, click the **edit** link for the plan.
8. To view details of each competency, click **view**.
9. To close the Training Plan Details screen, click **Cancel**, then **OK**.

The screenshot shows the 'Administration' tab selected, with the 'Training' sub-tab active. The main content area displays employee information for 'Abban01, Rhonda' and a 'Training Plan History' table. Callouts point to specific elements:

- Click here to display the Training Plan History screen.** Points to the 'Plans' link in the left-hand menu.
- Click here to view details or a course the worker completed as part of the plan.** Points to the '+' icon next to the 'orientation' row in the Training Plan History table.
- Click here to add a new training plan.** Points to the 'Add Training Plan' button.
- Click here to edit details of a course.** Points to the 'edit' link next to the 'orientation' row.
- Click here to display Training tasks.** Points to the 'edit' link in the top navigation bar.
- Click here to display Administrative tasks.** Points to the 'Training' link in the top navigation bar.

Home	Intake	Case	Provider	Financial	Administration	Utilities
			Staff	Maintenance	Security	Reports
					Training	Utilities
Competencies Plans	Employee ID: 15390 Agency: Butler County Children Services Board	Employee Name: Abban01, Rhonda Job Title: SUP	Hire Date: 12/13/2005 Job Start Date: 01/17/2006			
Training Plan History						
+ orientation [02/12/2006 - 04/12/2006] edit completion						
Add Training Plan						

How to record competency information

When you create a worker's training plan, you select a series of competency areas the worker will fulfill. Competencies are set up in the system beforehand, outside of training plans. Before you add a competency area, you must always search to make sure it does not already exist in the system.

1. From the Home screen, click the **Administration** tab, then click the **Training** tab. The Competencies screen appears.
2. Click **Competencies**. The Competency Area Search Criteria screen appears.
3. Complete the search criteria.
4. Select the **Show Inactive** check box to include competencies

that are inactive. If the competency exists but is currently inactive, you can activate it rather than create a new record.

5. Click **Search**. The competencies that meet your criteria appear in the Competency Area Search Results table.
6. Click the **select** link next to a competency you want to update, or click **Add Competency Area** for a new competency. The Competency Area Details screen appears.
7. Complete the fields to describe this competency area.
8. Click **Save**. You are returned to the Competency Area Search Criteria screen.

The screenshot shows the 'Competency Area Details' form. On the left, a sidebar contains a 'Competencies' menu with a 'Plans' sub-item. The main form area includes the following fields and controls:

- Category:** A dropdown menu.
- Type:** A dropdown menu.
- Number:** A text input field.
- Description:** A large text area.
- Comments:** A text area.
- Inactive:** A checkbox.
- Agency:** A dropdown menu.
- Source:** A dropdown menu.
- Competency Area:** A text input field.

Annotations with arrows point to these fields from external text boxes:

- 'Select the course category to which this competency applies.' points to the **Category** dropdown.
- 'Select the organization that sponsors this competency here.' points to the **Agency** dropdown.
- 'Select the agency to which this competency applies here.' points to the **Source** dropdown.
- 'Select the type of course that addresses the competency here.' points to the **Type** dropdown.
- 'Enter a unique number assigned to the competency here.' points to the **Number** text field.
- 'Select this check box to change the status of this competency to "inactive." Remove the check to return the status to "active."' points to the **Inactive** checkbox.
- 'Enter a short description of the competency here.' points to the **Description** text area.
- 'Enter additional information describing a change in competency here.' points to the **Comments** text area.

How to record a worker's training plan

As a supervisor, you can create or update training plans for workers who report to you.

1. From the Home screen, click the **Administration** tab, then click the **Training** tab. The Competencies screen appears.
2. Click the **Plans** link in the menu on the left. The Employee Search Criteria screen appears.
3. Complete the search criteria and click **Search**. The Employee Search Results are displayed below.
4. Click the **select** link, then click the **edit** link next to the training plan to update the details, or click **Add Training**

Plan to create a new plan. The Training Plan Details screen appears.

5. Complete the required fields. Click **Add Competencies** to add a competency to the plan. The Competency search screen appears.
6. Enter search criteria to locate the competency you want to add, then click **Search**. The competencies that match your criteria appear in the search results table.
7. Select the check box next to each competency you want to add to this plan, then click **Select**. You are returned to the Training Plan Details screen.
8. Repeat steps 5-7 for each competency area you want to add, and click **Save** to return to the previous screen.

Administration > Training > Plan

Employee ID: 12345 Employee Name: Smithy, Bob Hire Date: 01/01/2004
 Agency: Franklin CSA Job Title: Supervisor Job Start Date: 01/01/2004

Training Plan Details

Name: *

Start Date: *

End Date: *

Comments:

Status:

Competencies

	Number	Competency Title	Category	Source	Type	
view	100	Legal Aspects of Child Protection	Core Competencies	OCWTP	Caseworker	delete
view	101	Family-Centered Child Protective Services	Core Competencies	OCWTP	Caseworker	delete
view	102	Case Planning and Family-Centered Casework	Core Competencies	OCWTP	Caseworker	delete
view	103	The Effects of Abuse and Neglect on Child Development	Core Competencies	OCWTP	Caseworker	delete
view	104	Separation, Placement, and Reunification	Core Competencies	OCWTP	Caseworker	delete

Enter the plan Name, and Start and End Dates during which this plan is in effect.

Enter narrative text here about the training plan.

Click here to view competency details.

Click here to add new competencies.