Managing Case Services

Knowledge Base Article

Ohio | Department of Job and Family Services

Managing Case Services

This Knowledge Base Article presents new SACWIS system features for managing the various aspects of case services.

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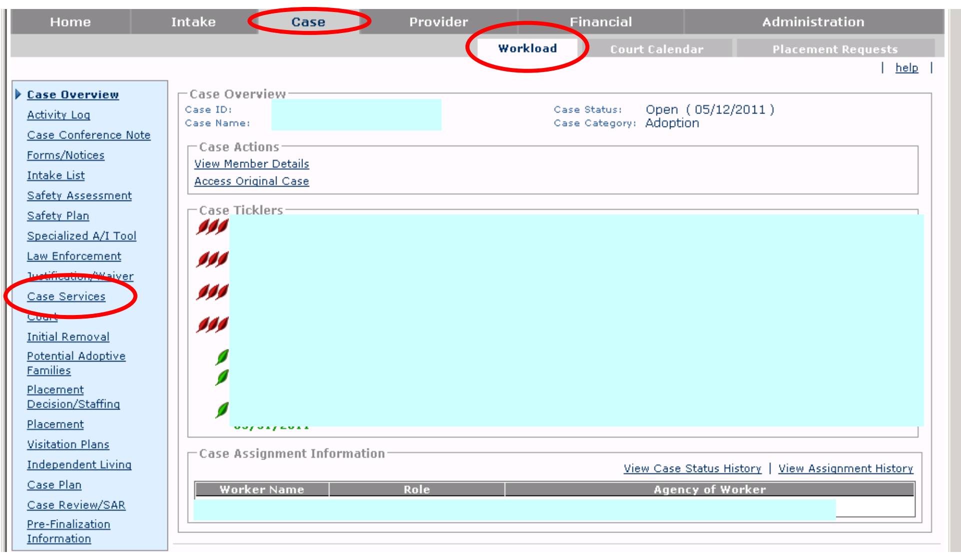
Viewing Case Service Information

To view case service information, complete the following steps:

1. From the SACWIS **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Select the appropriate **Case ID** link.

Note: If you know the **Case ID** number, you can also use the **Search** link at the top of the **Home** screen and navigate to the **Case Overview** screen.

4. On the **Case Overview** screen, click the **Case Services** link in the light-blue **Navigation** menu on the left.



The **Case Services Filter Criteria** screen appears displaying the **Case Services** section beneath it.

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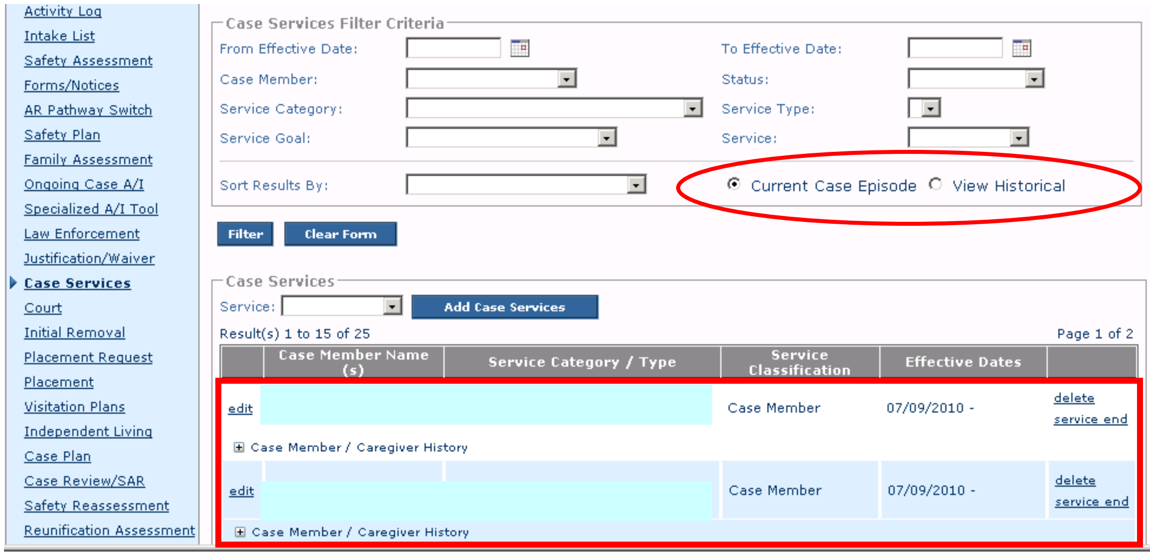
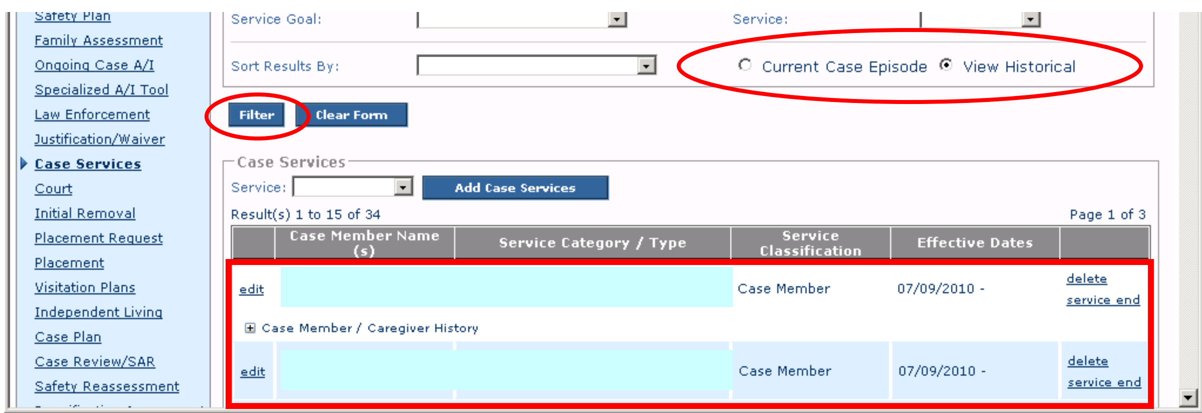
Viewing Current or Historical Case Services

As shown below, the screen defaults with the **Current Case Episode** radio button selected and the **Case Services** section displaying all **current** case services.



To view **all case services** created during any open case episode (current and past), complete the following steps:

1. Click the **View Historical** radio button
2. Click the **Filter** button.



The **Case Services** section displays **all services** from the current and previous open case episodes.

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Viewing the Case Member / Caregiver History

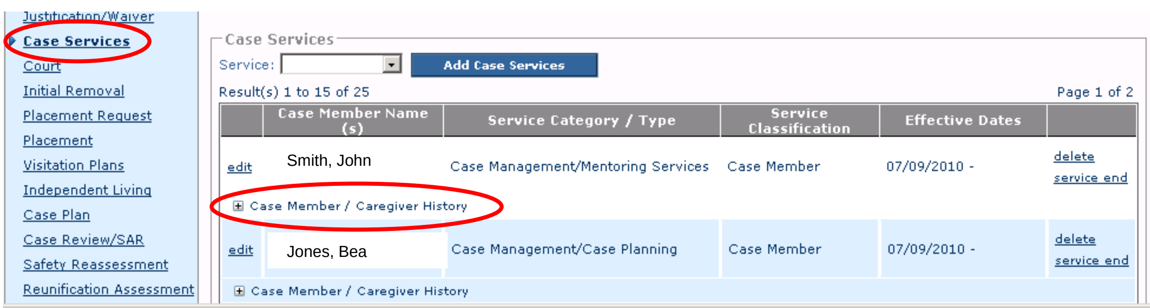
The **Case Services** section can display a history of the service(s) linked to a case member, along with the current status of those services.

Specifically, when expanded the **Case Member / Caregiver History** link displays the following information:

- All Case Members and Caregivers (if caregivers are applicable)
- Current Case Service Status
- Provider Name
- Service Description
- Status Begin Date / End Date

To view the history, complete the following steps:

1. In the **Case Services** section, locate the appropriate case service.
2. Click the **Case Member / Caregiver History** link to expand the case member's service status record.



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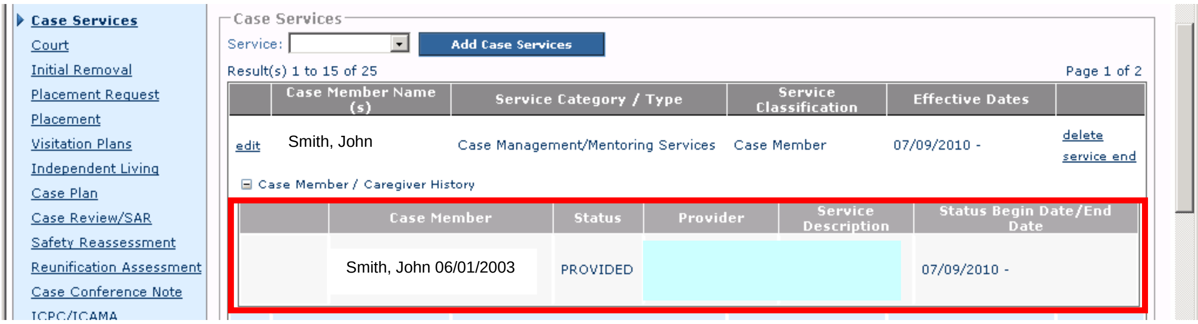
Example Expanded Showing One Case Member:



Example Expanded Showing Multiple Case Members:

3. To close the history, click the **Case Member / Caregiver History** link again.

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Adding a New Case Service

Complete the following steps to add a new case service for a case member:

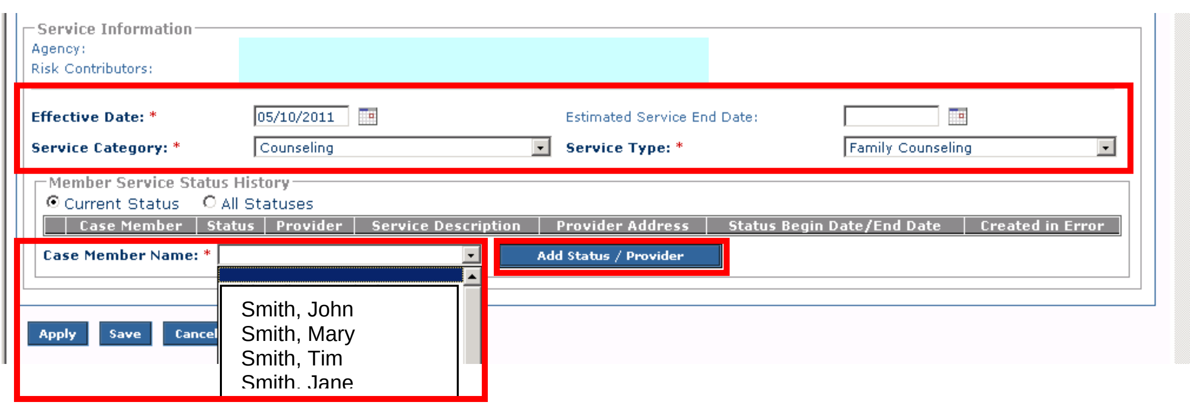
1. Navigate to the **Case Services** section.
2. In the **Service** field, select **Case Member** from the drop-down list.

Important: You should only select **Caregiver** when one of the children is in placement. **To add a caregiver service**, see **Adding a New Caregiver Service** sub-section later in this Knowledge Base Article.

3. Click the **Add Case Services** button.

The **Service Information** screen appears.

4. In the **Effective Date** field, enter the appropriate date.
5. In the **Service Category** field, select the appropriate category from the drop-down list.
6. In the **Service Type** field, select the appropriate type from the drop-down list.
7. In the **Case Member Name** field, select the appropriate name from the drop-down list.
8. Click the **Add Status / Provider** button.

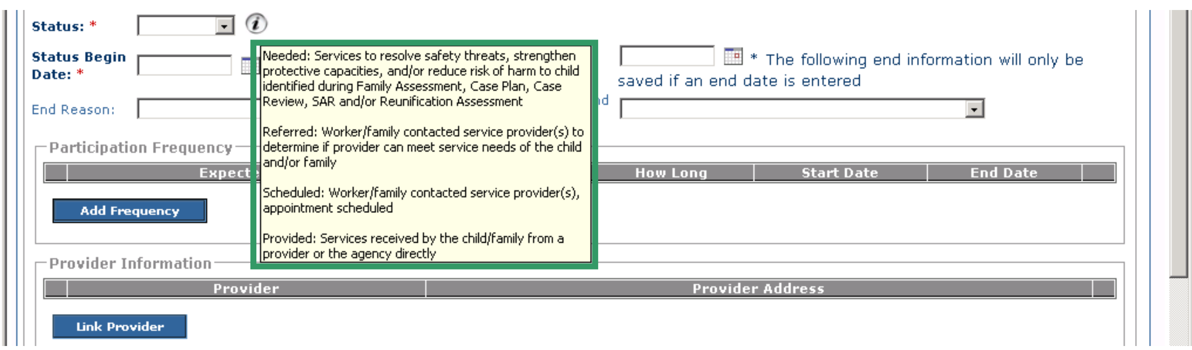


The **Status Details** screen appears.

9. In the **Status** field, select the appropriate status from the drop-down list.
10. Select a date in the **Status Begin Date** field.

Important:

- The **Link Provider** button (shown in orange) will only be available (enabled) if the status types of **Referred**, **Scheduled**, **Provided** are selected.
- If you hover over the icon (circled in green), the system displays definitions of the four status terms as shown below.



Status Term Definitions for Icon

Needed: Services to resolve safety threats, strengthen protective capacities, and/or reduce risk of harm to child identified during Family Assessment, Case Plan, Case Review, SAR, and/or Reunification Assessment

Referred: Worker/family contacted service provider(s) to determine if provider can meet service needs of the child and/or family

Scheduled: Worker/family contacted service provider(s) appointment scheduled

Provided: Services received by the child/family from a provider or the agency directly

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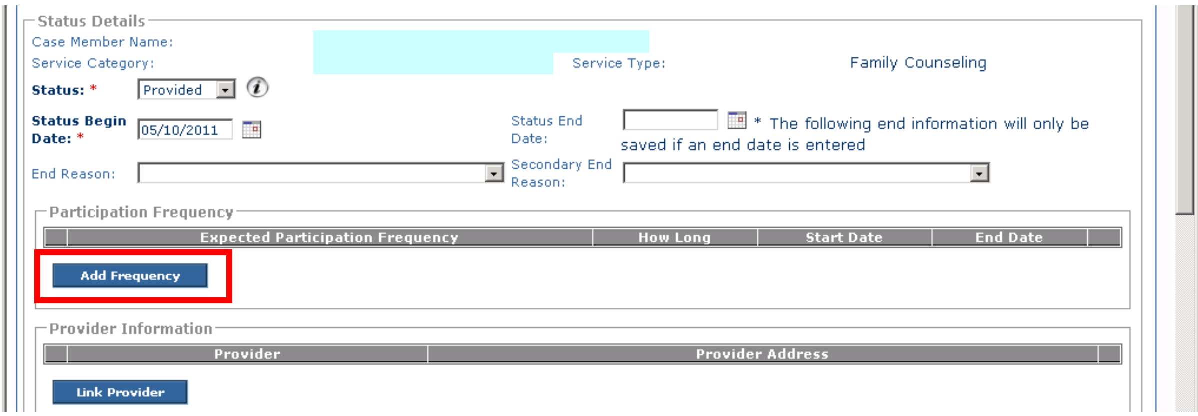
Adding Participation Frequency

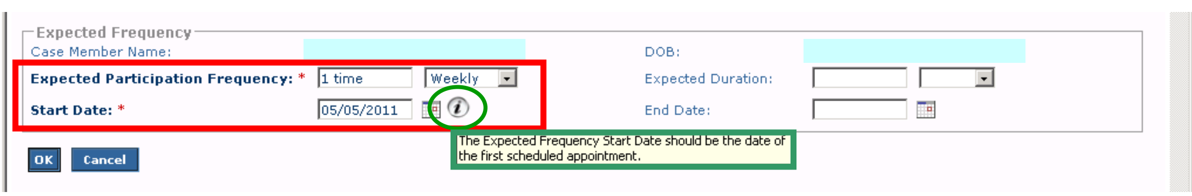
To add a case member’s participation frequency, complete the following steps:

1. If applicable, click the **Add Frequency** button on the **Status Details** screen.



The **Expected Frequency** screen appears.

2. In the **Expected Participation Frequency** field, enter the frequency into the **two** fields. In the second field, you will make a selection from the drop-down list.
3. In the **Start Date** field, enter the appropriate date.



Note:

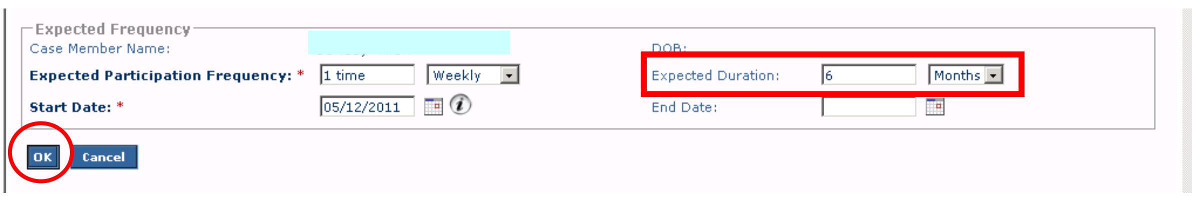
- The frequency participation date cannot be before the start date of the status record for a case member.
- If you hover over the icon (circled in green), the **Start Date** definition appears with a message saying: The **Expected Frequency Start Date** should be the date of the first schedule appointment.
- If **One Time** is selected from the **Expected Participation Frequency** field drop-down list, the text box (to its left) is not available (disabled). If any other value is selected from the drop-down list, the text box must be populated. The text box accepts both alpha and numeric content.

4. If needed, complete the **Expected Duration** field.

Important:

- If needed, you can return to this screen and enter the **Expected Duration** date at a later time.
- The **Expected Duration** field's values are **Days**, **Weeks**, **Months**, and **Years**.
- The **Expected Duration** field can be future dated, but it must be on or after the **Expected Participation Frequency Start** date.

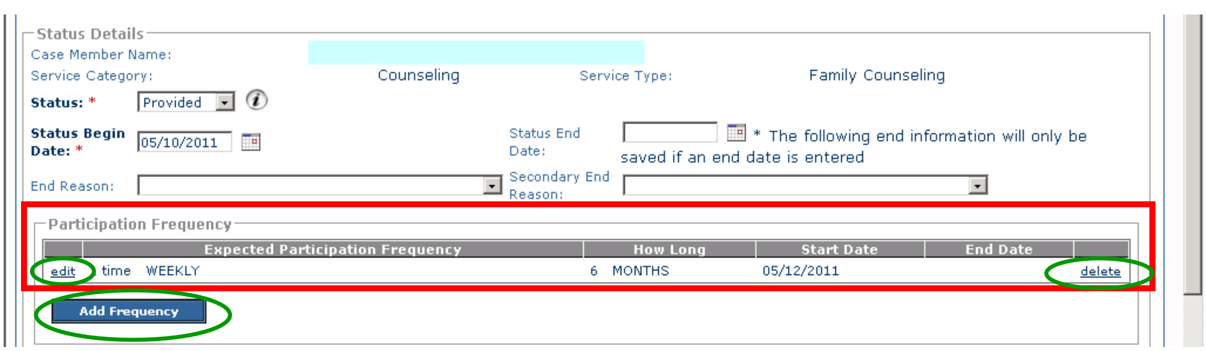
5. When complete, click the **OK** button.



The **Status Details** screen appears displaying the new content in the **Participation Frequency** section as shown below.

As shown in green below:

6. To edit this record, click the **Edit** link on the left. After editing the record, click the **OK** button again.
7. To delete this record, click the **Delete** link on the right. Then, click the **OK** button.
8. To add another frequency record, click the **Add Frequency** button again.



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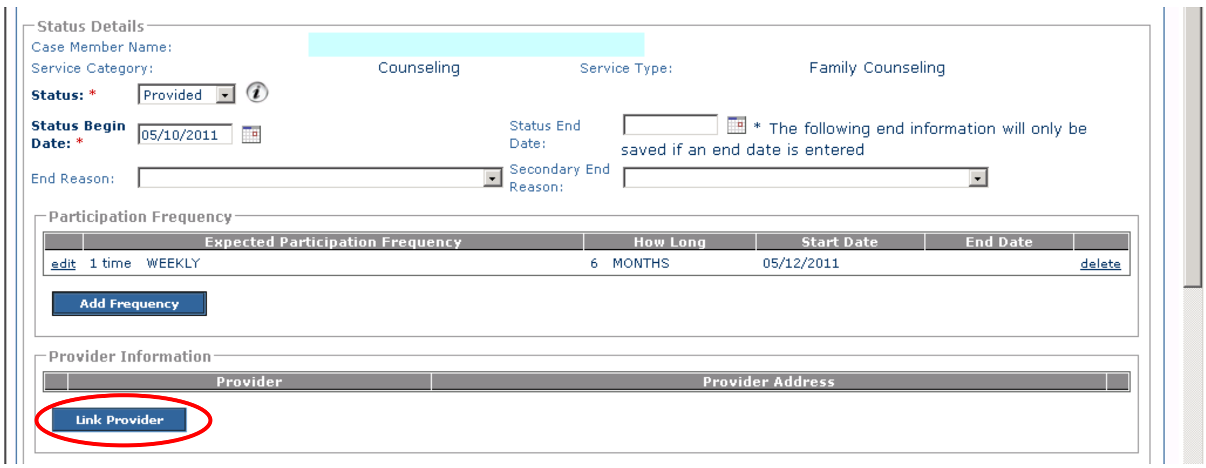
Linking a Provider

Linking a provider is **required** for the statuses of **Referred**, **Scheduled**, and **Provided** in order to save the record. To do so, complete the following steps:

1. On the **Status Details** screen in the **Provider Information** section, click the **Link Provider** button.

Important:

- The **Link Provider** button will only be available (enabled) when the status types of **Referred, Scheduled**, and **Provided** are selected in the **Status** field.
- For a **Referred** status, multiple providers can be linked. Refer to steps at the end of this sub-section to do so.

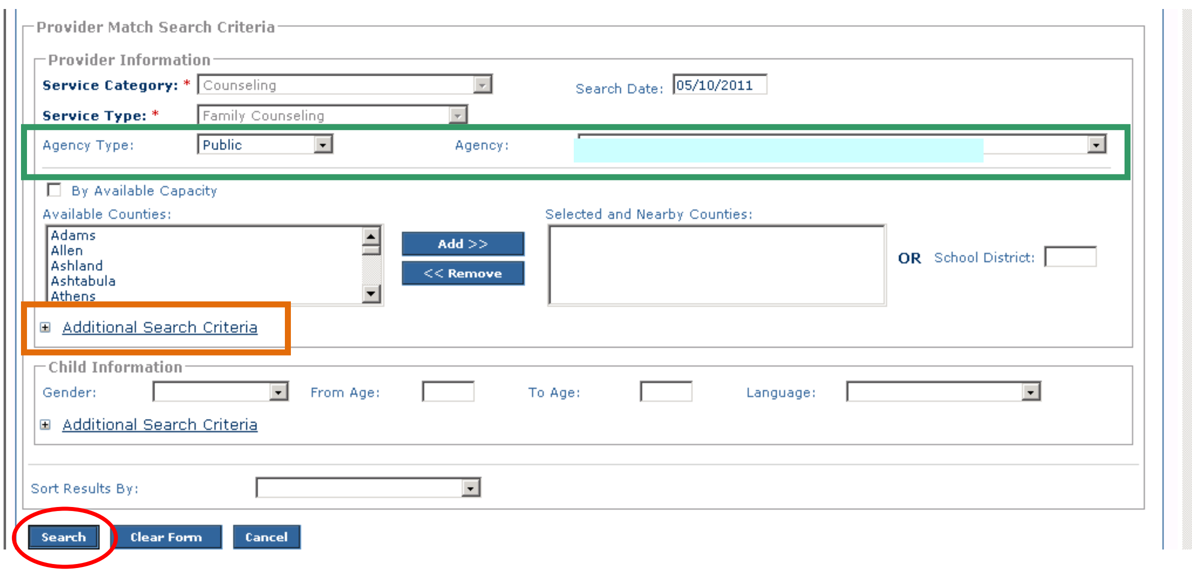


The **Provider Match Search Criteria** screen appears displaying the **Provider Information** section. Many fields are already pre-populated with data as shown below.

Important:

- In the **Provider Information** section, **unless you know that your agency is the recommending agency**, you will need to remove the default information from both the **Agency Type** field and **Agency Provider** field (shown in green).
- If you know the **Provider ID** number, you can click the **Additional Search Criteria** link (shown in orange) and search by the Provider ID.
- As agencies complete Non-ODJFS merges within SACWIS, the recommending agency for most provider types will switch to ODJFS. As a result, most Non-ODJFS providers will eventually appear showing ODJFS as the recommending agency.

2. Click the **Search** button.

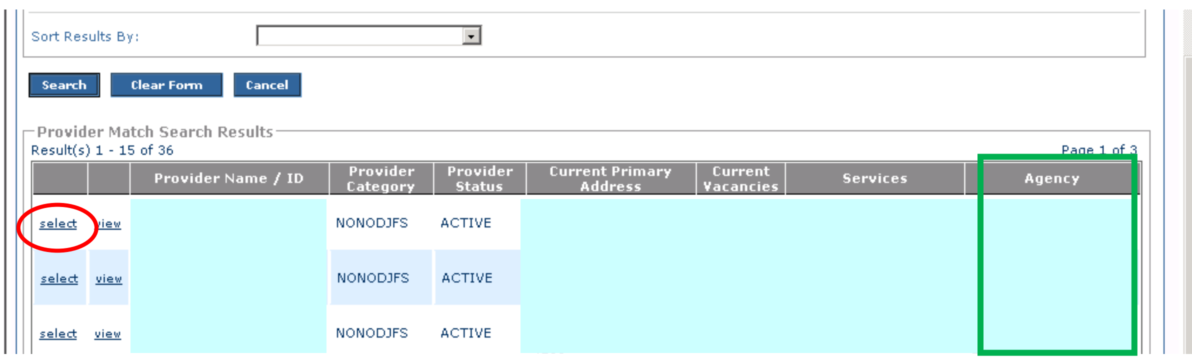


The **Provider Match Search Results** appears at the bottom of the screen.

3. To select a provider, click the **Select** link in the appropriate row.

Important:

- The list that appears in the **Agency** column of the **Provider Match Search Results** list (shown in green) refers to the agency that has entered the service on the provider. Be sure to select the service (shown in the **Services** column) that corresponds to your agency.
- If your agency has not yet entered a service for this provider, please contact your Services Administrator and have them set up the service you are trying to use.
- In order to save the record, the provider must have an **active service** as of the begin date and **active status** as of current system date.



The **Status Details** screen appears displaying the **Provider Information** section now populated with information as shown below.

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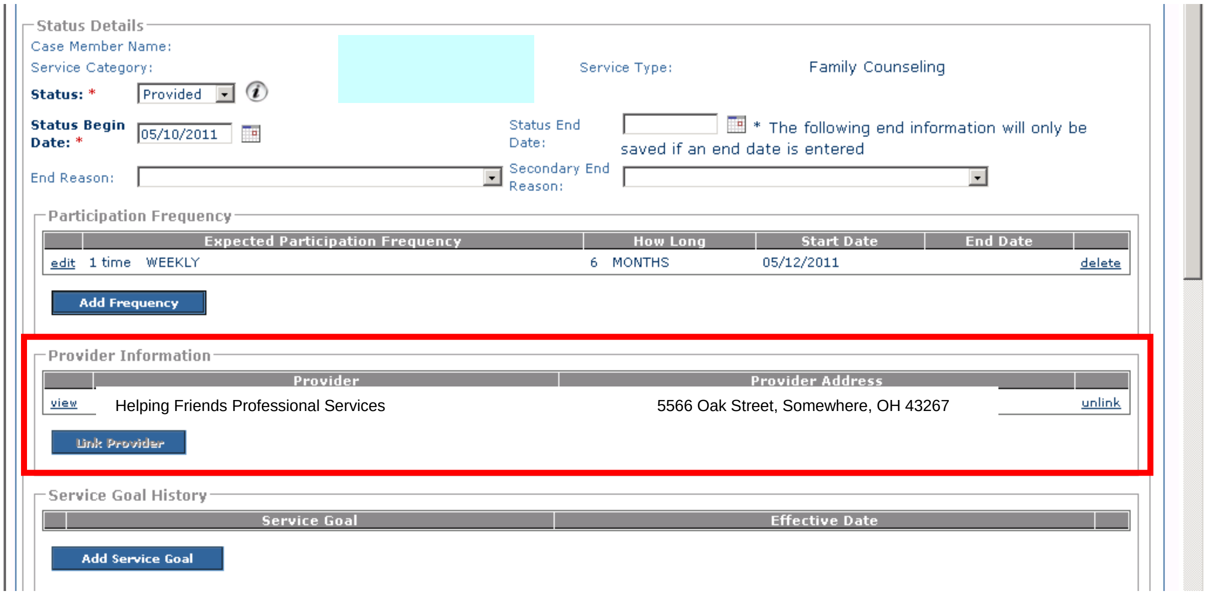

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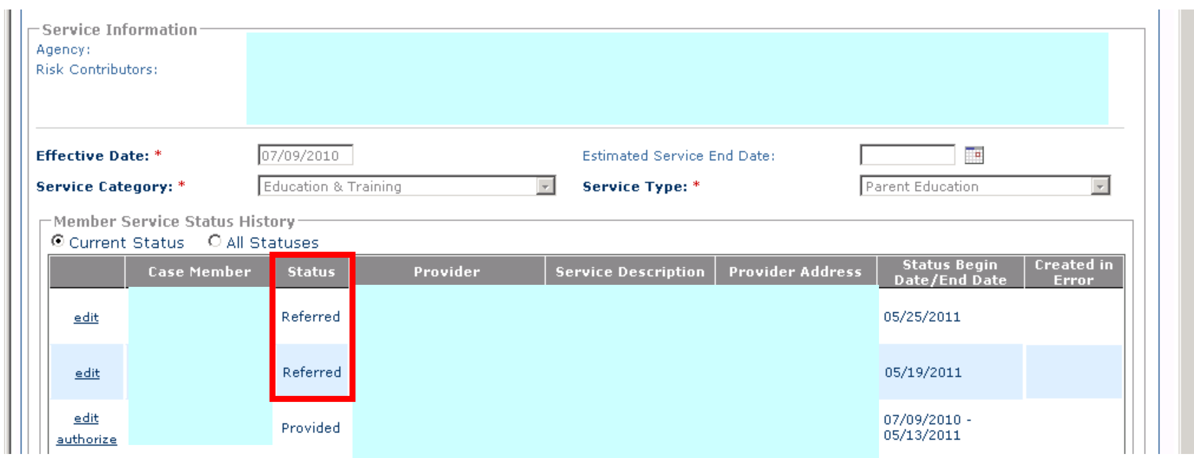
As mentioned above, for a **Referred** status, multiple providers can be linked. To do so, complete the following steps:

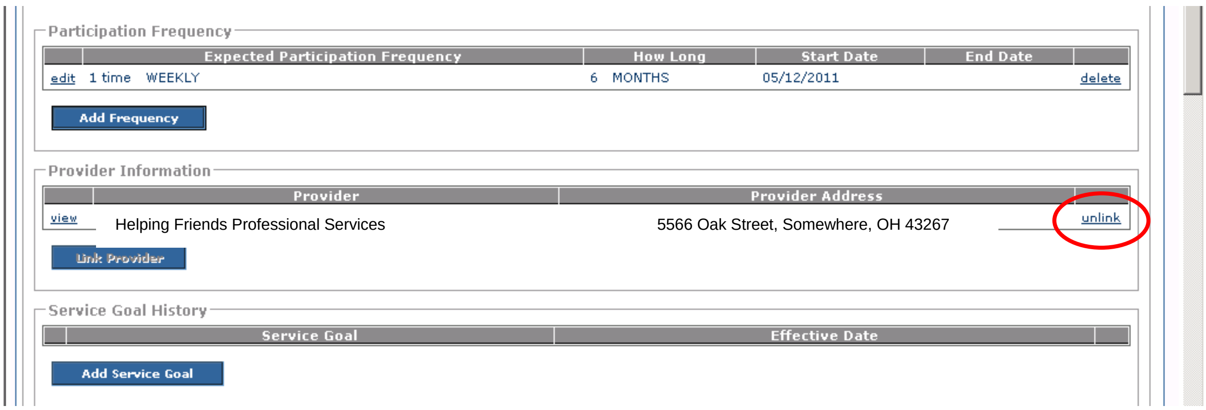
4. After linking the first provider, click the **Add Provider Status** button again.
5. On the **Status Details** screen, select **Referred** in the **Status** field.
6. Select the **Status Begin Date**. The system automatically default the previously selected provider in the **Provider Information** section.
7. Unlink that provider (using the steps in the sub-section below).
8. Link another provider (using the steps in this sub-section).
9. Click the **Save** button. The **Service Information** screen appears displaying the multiple providers as shown below.
10. Repeat these steps as many times as needed to show all providers for the **Referred** status.



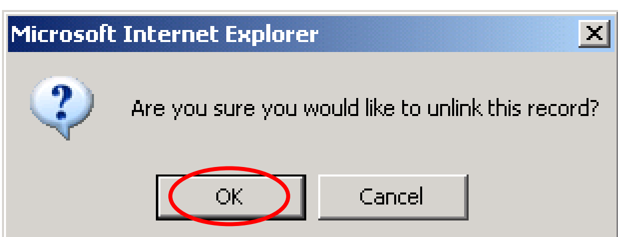
Unlinking a Provider

To unlink a provider, complete the following steps:

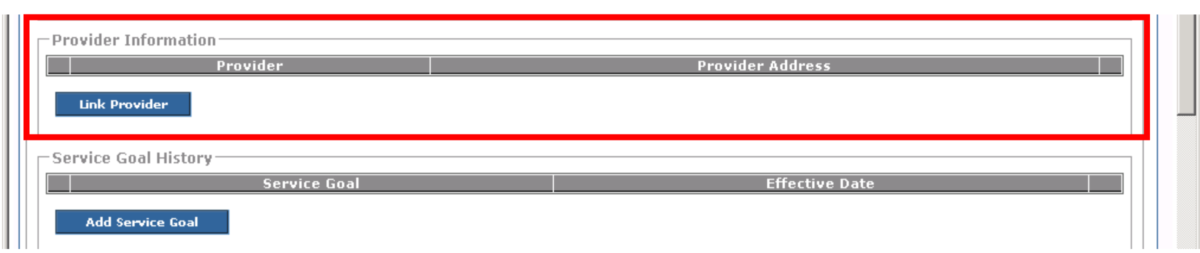
1. On the **Status Details** screen in the **Provider Information** section, locate the appropriate row.
2. Click the **Unlink** link on the right.



3. Click the **OK** button when the following warning message appears:



The **Provider Information** section appears displaying **no provider information**.

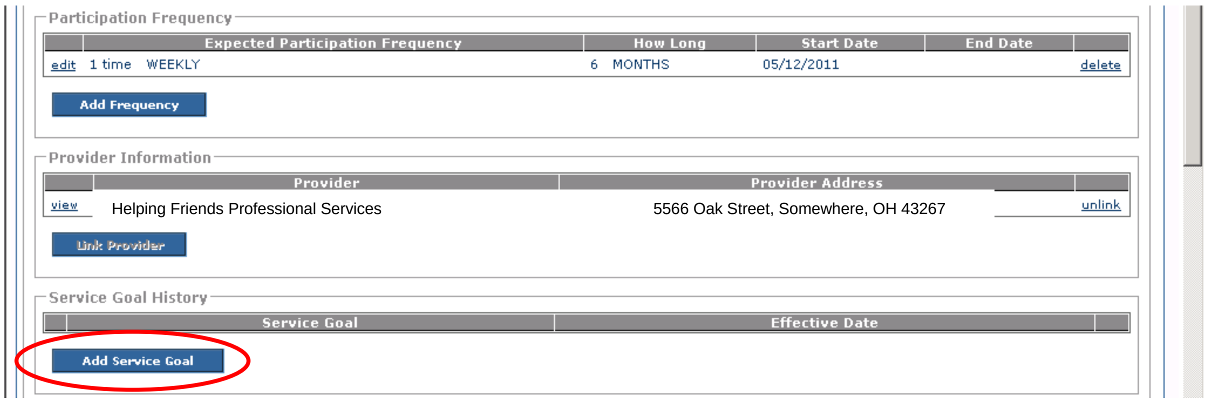


You can link a new provider following the steps in the **Linking a Provider** sub-section.

Adding Service Goals

To add a service goal, complete the following steps:

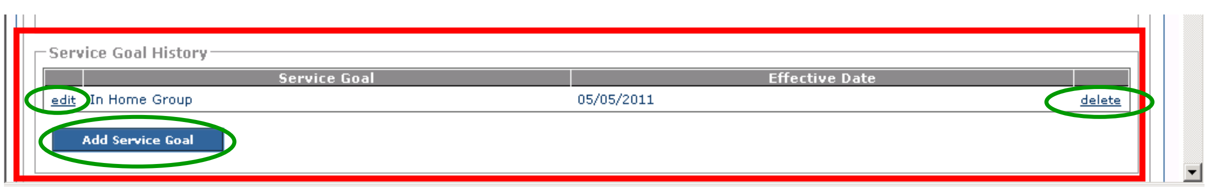
1. On the **Status Details** screen, click the **Add Service Goal** button.



The **Service Goal History Details** screen appears.

2. In the **Service Goal** field, select the appropriate goal from the drop-down list.
3. In the **Effective Date** field, enter the effective date. The case service effective date auto-populates, but it can be changed.
4. Click the **OK** button.

The **Status Details** screen appears displaying the now populated **Service Goal History** section as shown below.



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5. To edit this record, click the **Edit** link on the left (as shown in green above). After editing the record, click the **OK** button again.
6. To delete this record, click the **Delete** link on the right. Then, click the **OK** button.
7. To add another service goal record, click the **Add Service Goal** button again.

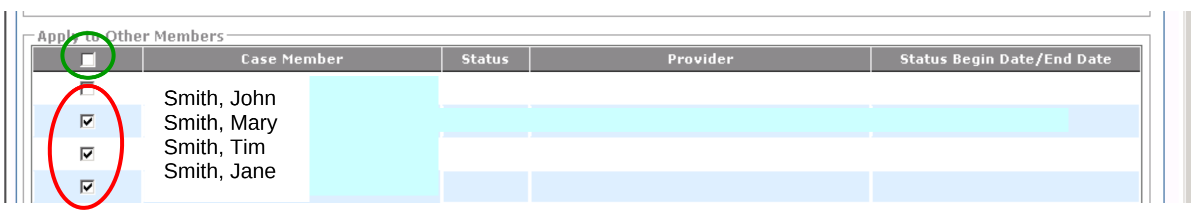
Applying Information to Other Case Members

To apply this same information to other case members, complete the following steps:

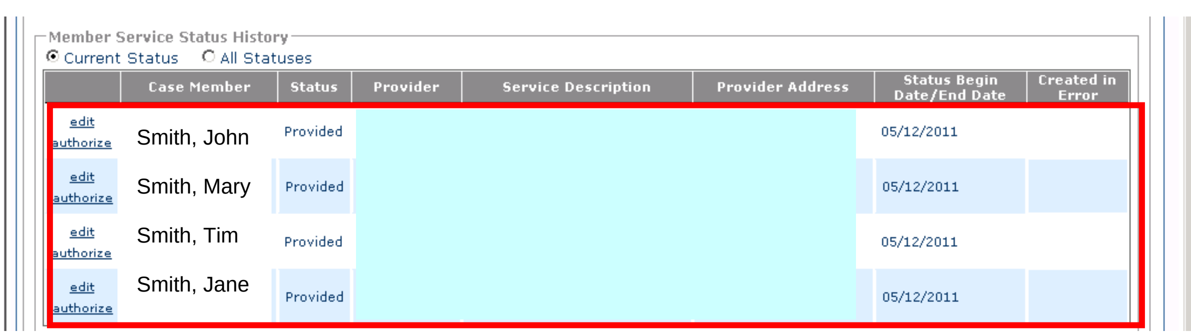
1. On the **Status Details** screen, scroll down to the **Apply to Other Members** section.
2. Enter a check mark in the box of the applicable case member(s).

Important: If you click the **check box in the header** (circled in green below), the system will select **all of the case members** in the list.

3. Click the **Save** button at the bottom of the screen.



The **Service Information** screen appears displaying all of the selected case members as shown below.



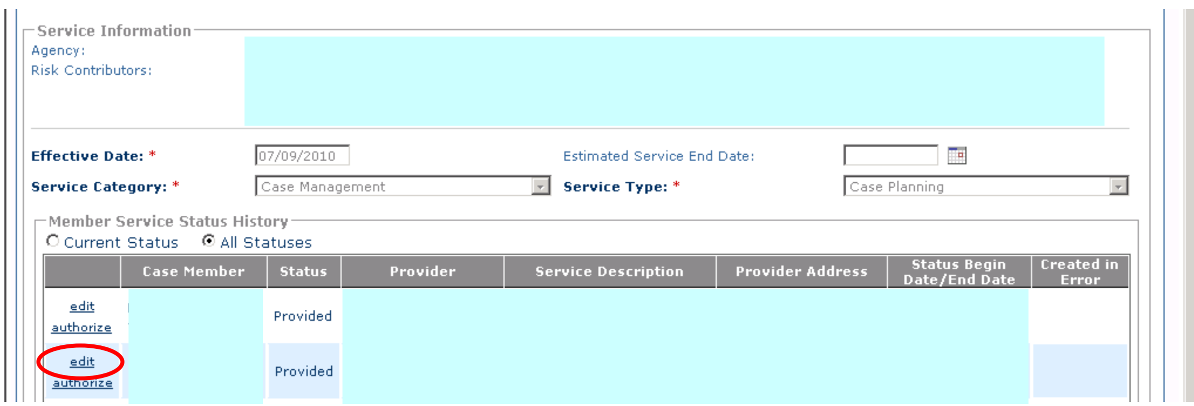
Editing Individual Status Records

You can edit many aspects of a status record, such as:

- Adding, editing, or deleting a case member's participation frequency
- Unlinking a provider and linking a new provider in the current record
- Linking multiple providers to a record which has a status of Referred
- Adding, editing, or deleting new service goals
- End-dating a case status

To edit a status record, complete the following steps:

1. Navigate to the case member's **Service Information** screen.
2. Click the **Edit** link next to the appropriate case member record.



The **Status Details** screen for that record appears.

3. To edit any of the items listed above, refer to the applicable sub-section in this Knowledge Base Article. See the Table of Contents to locate a specific topic.

4. When complete, click the **Save** button at the bottom of the screen.

The **Service Information** screen appears.

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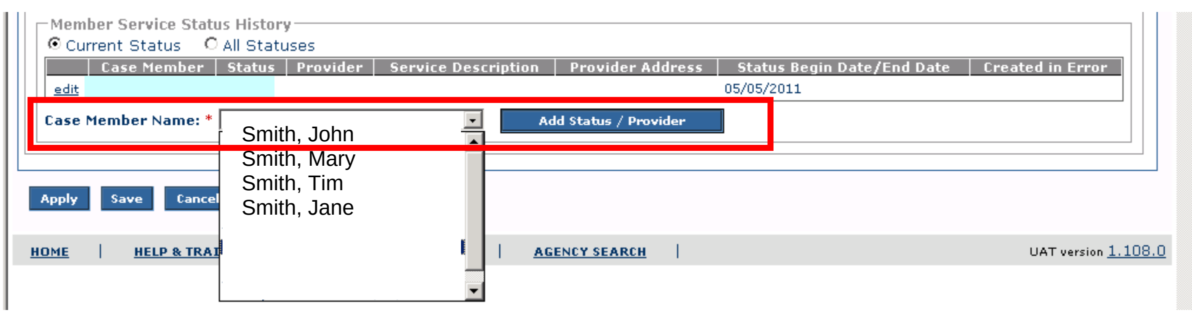
Adding a New Case Member Service Status

To add a new case member service status record, complete the following steps:

1. Navigate to the **Case Services** section for that case member.
2. In the appropriate row, click the **Edit** link (on the left).

The **Service Information** screen appears.

3. In the **Case Member Name** field (near the bottom), select the appropriate name.
4. Click the **Add Status / Provider** button.



The **Status Details** screen appears.

5. In the **Status** field, select the new case status from the drop-down list (as shown below).

Note: You can have multiple **Referred** statuses at the same time.

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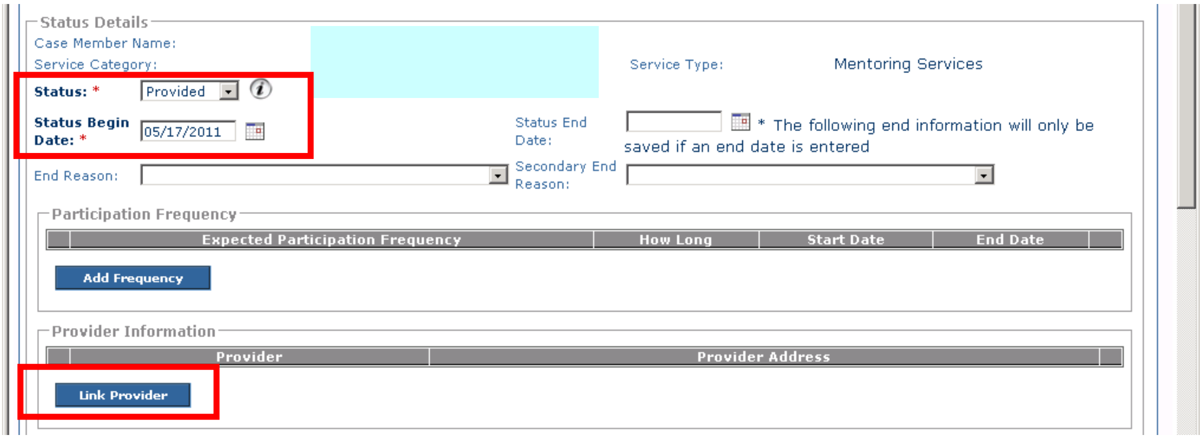
6. In the **Status Begin Date** field, enter the appropriate date.
7. To link a provider, follow the steps in the **Linking a Provider** sub-section of this Knowledge Base Article.

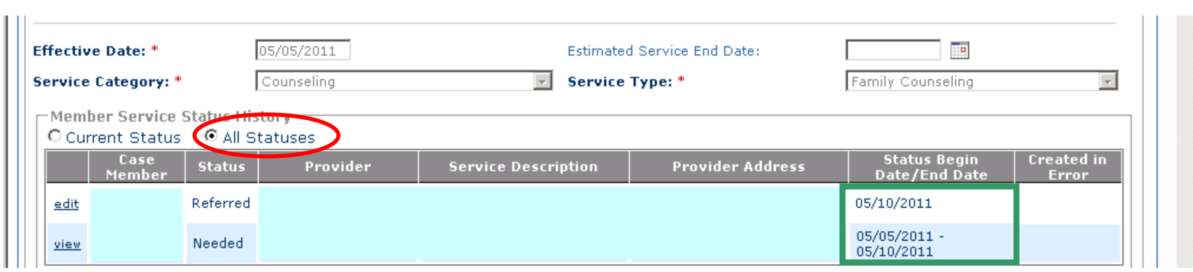


8. On the **Status Details** screen, update the following sections (as needed) using the steps previously discussed in this Knowledge Base Article:
   - Participation Frequency (**Adding Participation Frequency** sub-section)
   - Service Goal History (**Adding Service Goals** sub-section)
   - Apply to Other Members (**Applying Information to Other Case Members** sub-section)

9. When complete, click the **Save** button at the bottom of the screen. The **Service Information** screen appears.

Important: Upon save, the system populates the status end date of the previous non-end dated status record using the status begin date (shown in green below).

10. On the **Member Service Status History** screen, if you click the **All Statuses** radio button, you will see all status records for the case service.



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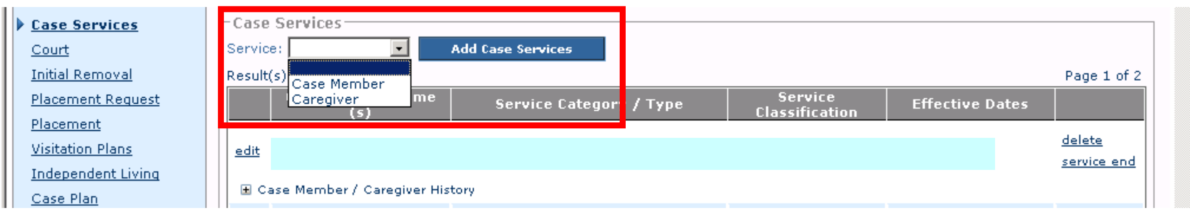
Adding a New Caregiver Service

You should only select **Caregiver** when one of the children is in placement. To add a new caregiver service, complete the following steps:

1. Navigate to the **Case Services** section for that case member.
2. In the **Service** field, select **Caregiver** from the drop-down list.
3. Click the **Add Case Services** button.

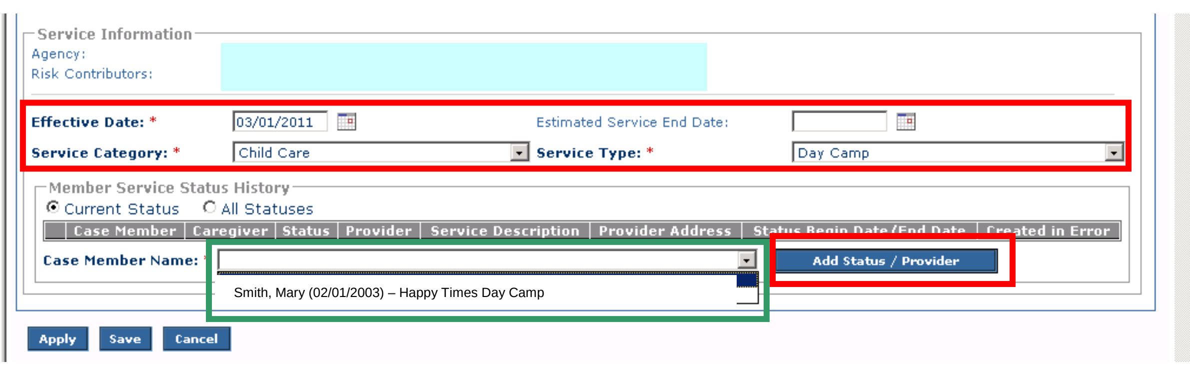


The **Service Information** screen appears.

4. In the **Effective Date** field, enter the appropriate date.
5. In the **Service Category** field, select the appropriate category from the drop-down list.
6. In the **Service Type** field, select the appropriate type from the drop-down list.
7. In the **Case Member Name** field, select the appropriate name from the drop-down list.

Important: The case member displays along with his / her current provider (shown in green below) and **will only display** if the child is / was in placement on the effective date of the service.

8. Click the **Add Status / Provider** button.



The **Status Details** screen appears.

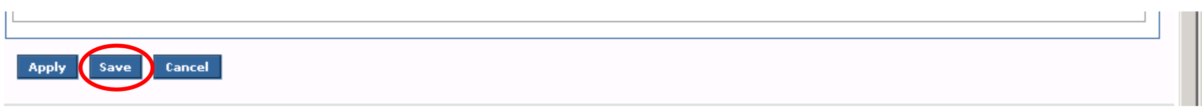
9. To finish adding a caregiver service, complete the steps as discussed in the **Adding a New Case Service** sub-section. Begin with the step where the **Status Details** screen appears. (The steps for adding a case member or a caregiver are the same from that point on.)

10. Next, complete the steps in the following sub-sections as previously discussed in this Knowledge Base Article:

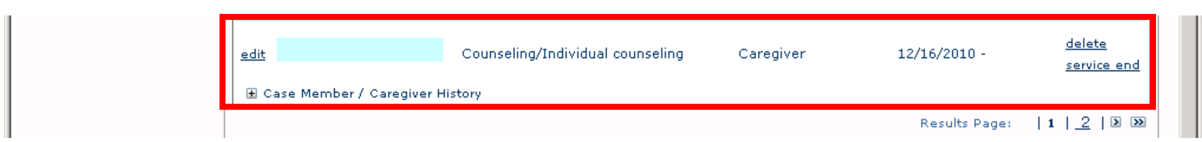
    - **Linking a Provider** (required for **Referred**, **Scheduled**, and **Provided** statuses)
    - **Adding Participation Frequency** (if needed)
    - **Adding Service Goals** (if needed)
    - **Applying Information to Other Members** (children in placement) (if needed)

11. When complete, click the **Save** button at the bottom of the **Status Details** screen. The **Service Information** screen appears.

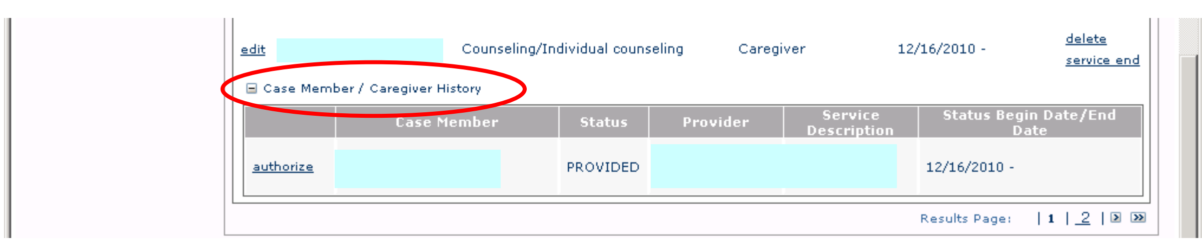
12. Click the **Save** button again.



The **Case Services** screen appears displaying the new caregiver record as shown here.



13. If needed, click the **Case Member / Caregiver History** link for that row to expand the box and view historical details.



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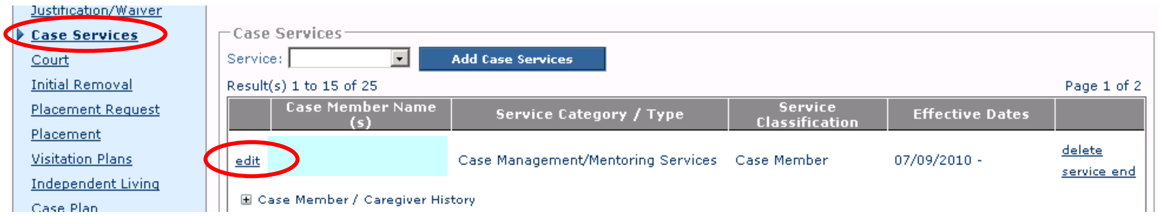
Marking a Status Record as Created in Error

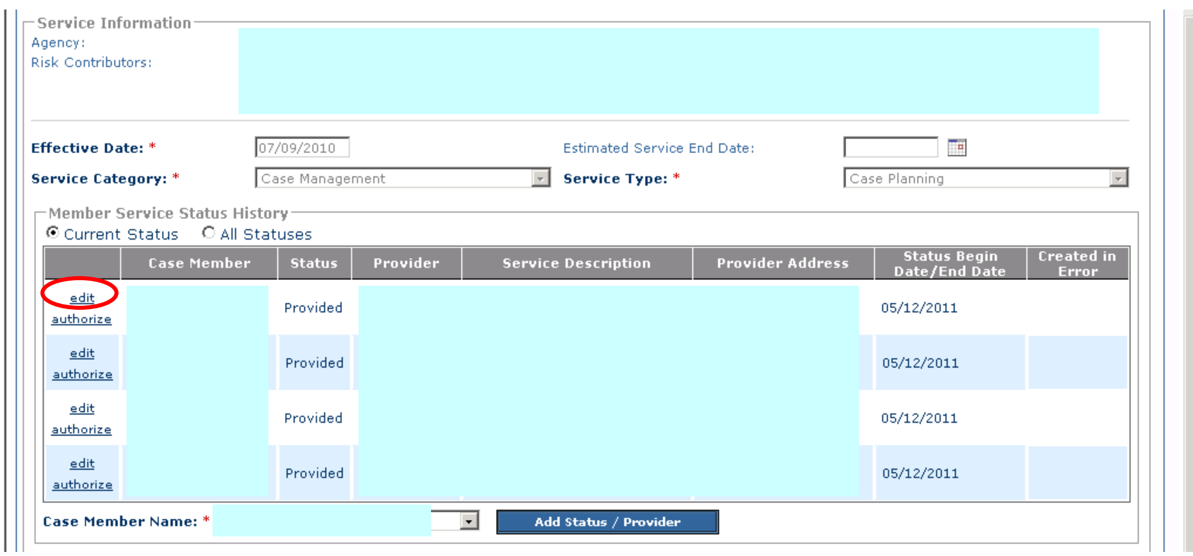
To mark a status record as created in error, complete the following steps:

1. On the **Case Services** screen for that case member, click the **Edit** link in the appropriate row.



The **Service Information** screen appears.

2. In the **Member Service Status History** section, click the appropriate **Edit** link.



The **Status Details** screen appears.

3. Scroll down and click the **Created in Error** check box (located below the **Comments** field).

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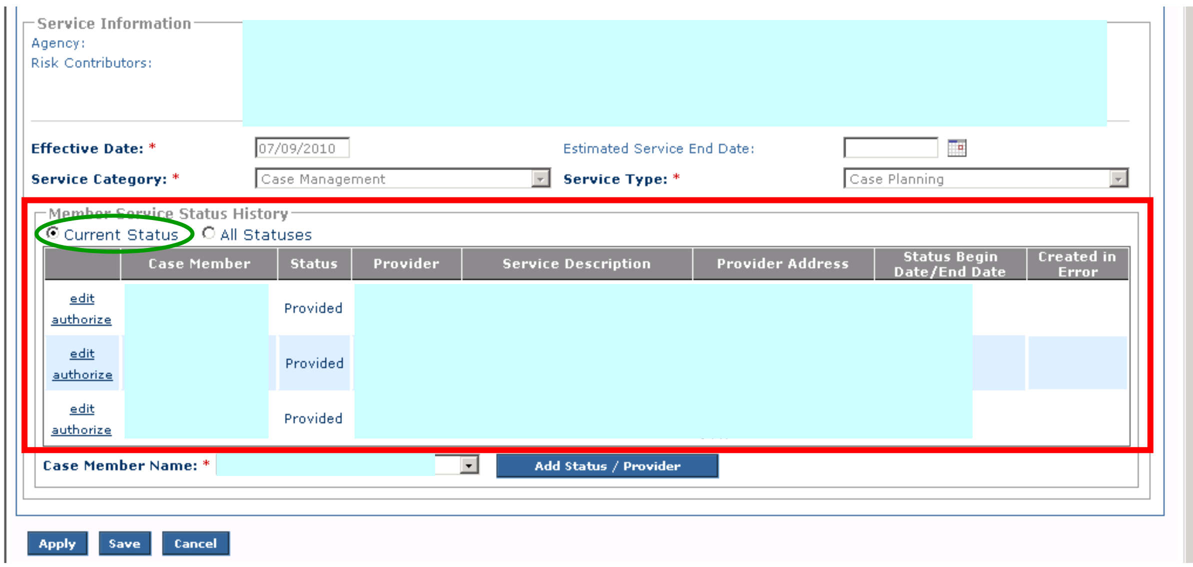
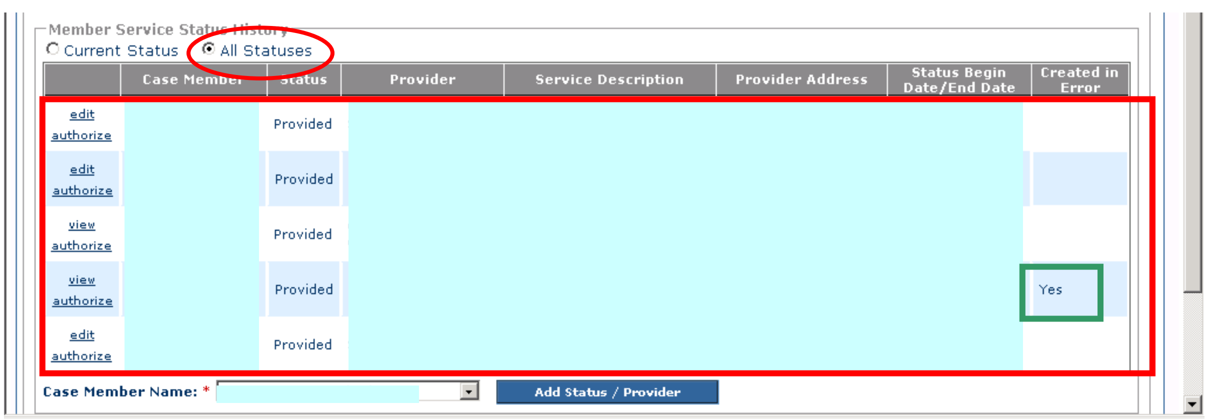
4. Click the **Save** button at the bottom of the screen.

The **Service Information** screen appears with that record removed from the **Member Service Status History** section.

The **Current Status radio** button (shown in green below) defaults to show only the current status for all case members created in that service.



5. To see **all "created in error" entries**, click the **All Statuses** radio button.



All of the case members appear in the **Member Service Status History** section. The "created in error" entries for that service have a **Yes** in the **Created in Error** column (shown in green above).

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End-Dating a Case Service

To end date a case service, complete the following steps:

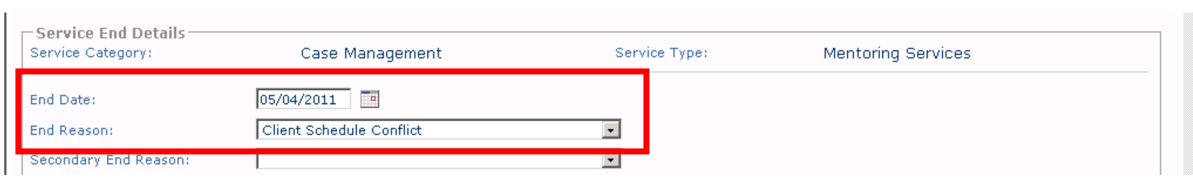
1. On the **Case Services** screen for the case member, locate the appropriate row.
2. Click the **Service End** link (on the right).

The **Service End Details** screen appears.

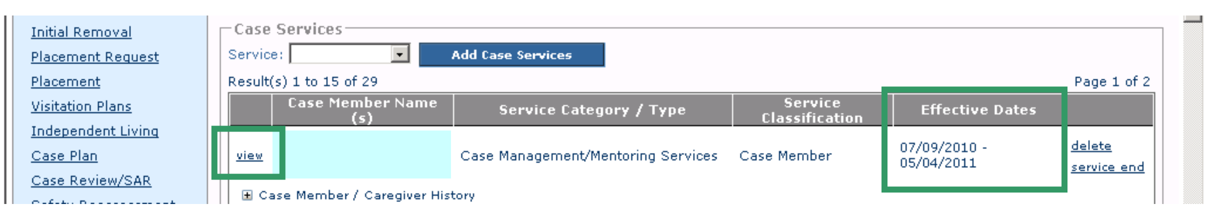
3. Enter a date in the **End Date** field.

Important: If **multiple case members** are on a service, the system will end date the case service, as well as the current status record for all case members (if it has no existing end date).

4. Select a reason from the **End Reason** field drop-down list.
5. Click the **Save** button at the bottom of the screen.



As shown below, the **Case Services** screen appears displaying the record with an end date in the **Effective Dates** column. Additionally, the system displays a **View** link on the left, rather than the **Edit** link that previously appeared.



Managing Case Services

End-Dating a Case Service Member Status Record

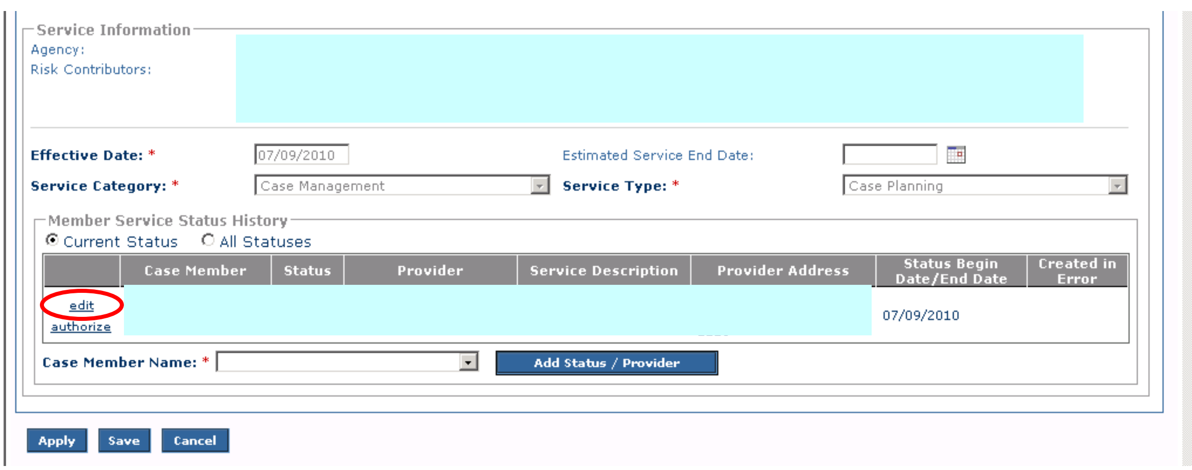
To end date a case service member status record, complete the following steps:

Note: When you end date a case service, SACWIS automatically end dates the case service member status record (if it has no existing end date) for all case members. The steps in this sub-section assume that the case service is still continuing and only the case service member status is ending.

1. On the **Case Services** screen for the case member, locate the appropriate row.
2. Click the **Edit** link (on the left).

The **Service Information** screen appears.

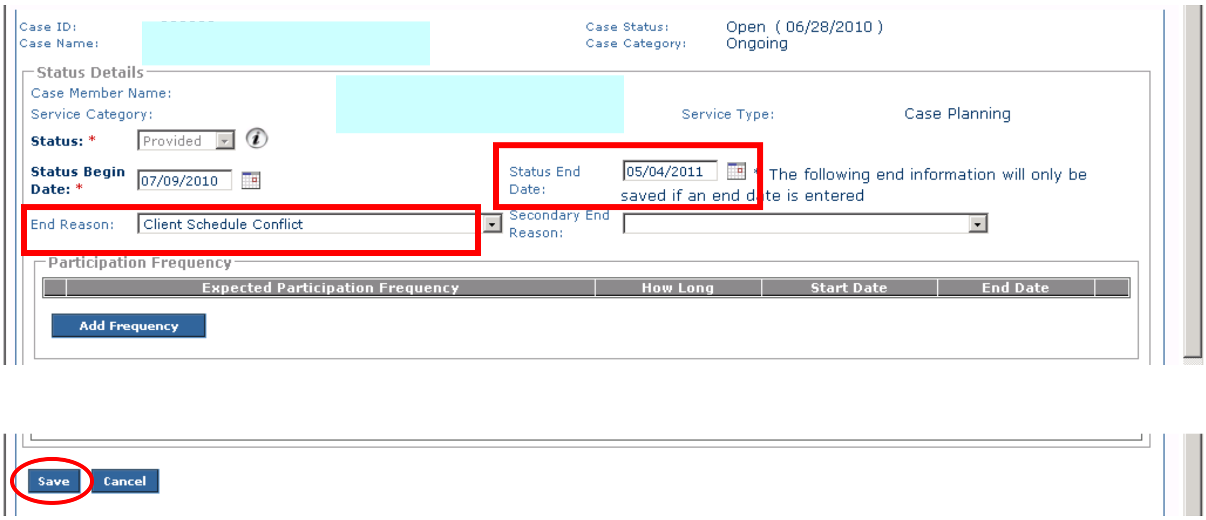
3. Click the appropriate **Edit** link in the **Member Service Status History** section.



The **Status Details** screen appears.

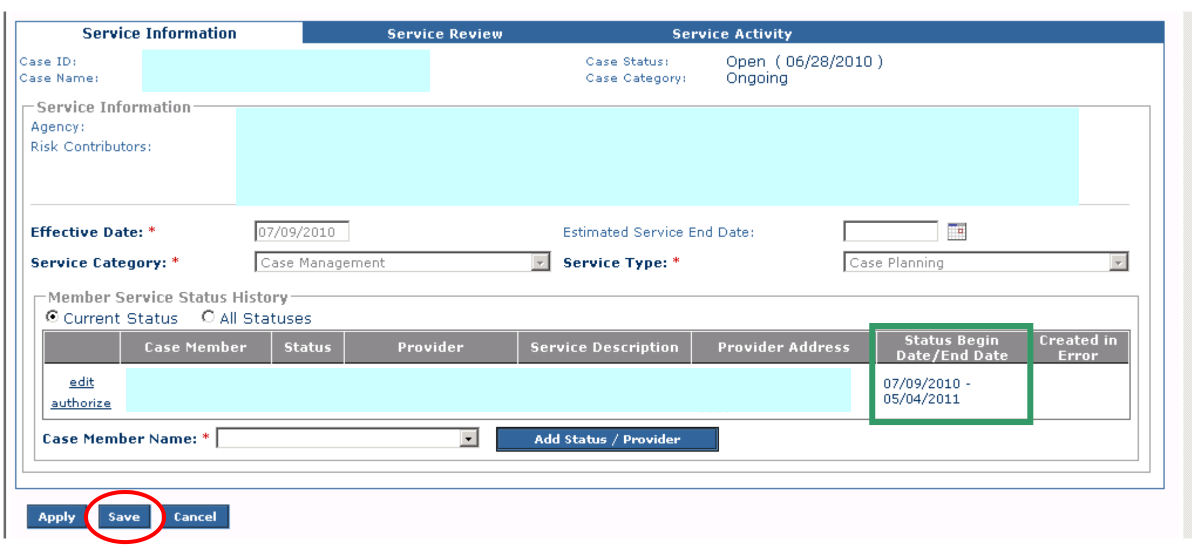
Managing Case Services

4. In the **Status End Date** field, enter the status end date.
5. In the **End Reason** field, select an end reason from the drop-down list.
6. Click the **Save** button at the bottom of the screen.



The **Service Information** screen appears displaying the end date in the **Status Begin Date / End Date** column (as shown in green below).

7. Click the **Save** button again to save the record.



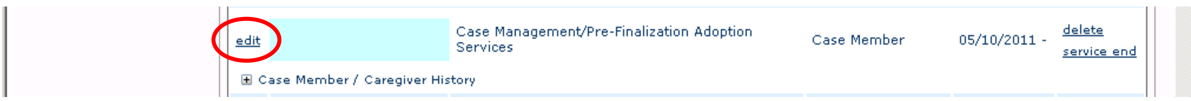
The **Case Services** screen appears.

Managing Case Services

Completing a Service Review

This sub-section discusses completing a service review that is done outside of a case review.

1. On the **Case Services** screen for the case member, locate the appropriate row.
2. Click the **Edit** link (on the left).



The **Service Information** screen appears.

3. Click the **Service Review** tab.

Important: From this tab, you can **edit a current** service review or **add a new** service review.

4. To edit an existing service review, click the **Edit** link in the appropriate row.
5. To add a service review, click the **Add Service Review** button.

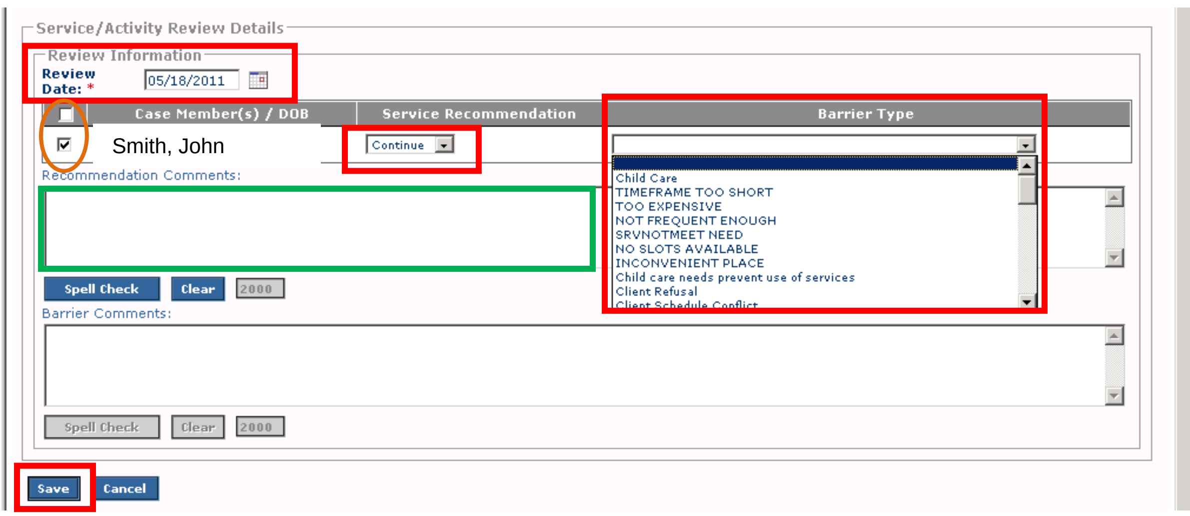
The **Service / Activity Review Details** screen appears.

6. In the **Review Date** field, select the appropriate date. This field defaults to the current date.
7. Select the check box next to the appropriate case member(s) name as shown in orange below.

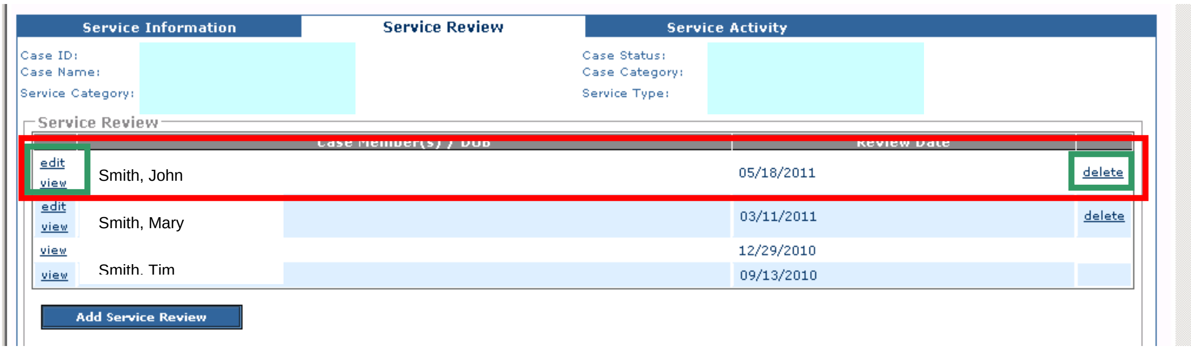
Important:

- If all of the case members need to be selected, click the check box in the header to select all.
- More than one case member can be selected.

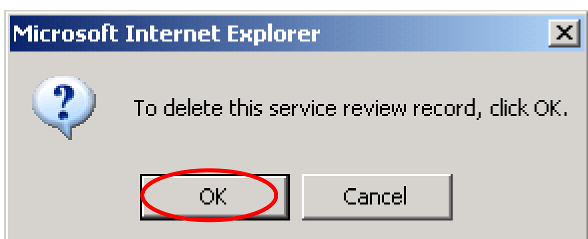
8. In the **Service Recommendation** column, choose from the drop-down list. The choices are **Continue**, **Modify**, or **Terminate**.
9. In the **Barrier Type** column, select the appropriate barrier.
10. If needed, type a recommendation into the **Recommendation Comments** field (shown in green below). **If barriers exist, this field is required.**
11. Click the **Save** button.



The **Service Review** screen appears displaying the new record.



12. If needed, click the **Delete** link to delete the current record (shown in green above).
13. When this warning message appears, click the **OK** button.



14. If needed, click the **View** or **Edit** links to view or further edit the content (shown in green above on the left).
15. Click the **Save** button at the bottom of the screen.

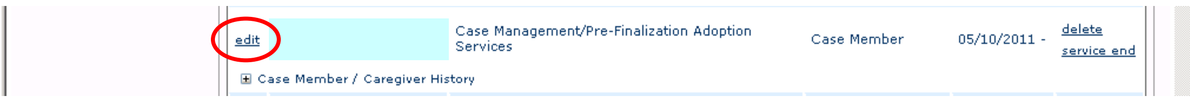
The **Case Services** screen appears.

Managing Case Services

Adding a Service Activity Record

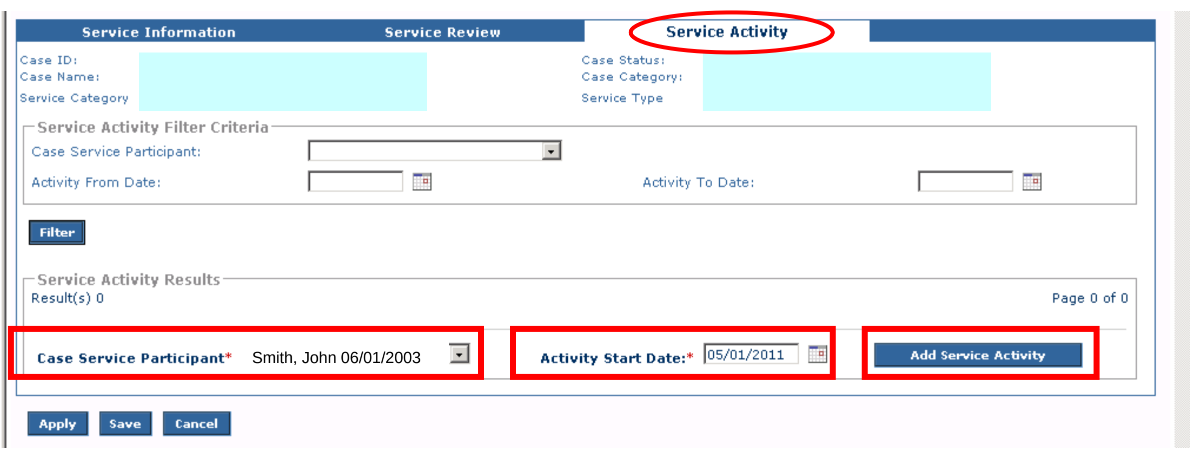
At a minimum, **a service activity (participation status) is required to be added once during every case review period**. To do so, complete the following steps:

1. On the **Case Services** screen for the case member, locate the appropriate row.
2. Click the **Edit** link (on the left).



The **Service Information** screen appears.

3. Click the **Service Activity** tab. The **Service Activity Filter Criteria** screen appears displaying the **Service Activity Results** section below.
4. In the **Case Service Participant** field (near the bottom), select the appropriate name from the drop-down list (only available for **Scheduled** or **Provided** status records).
5. In the **Activity Start Date** field, enter the appropriate date.
6. Click the **Add Service Activity** button.



The **Add Service Activity** screen appears displaying a calendar as shown below.

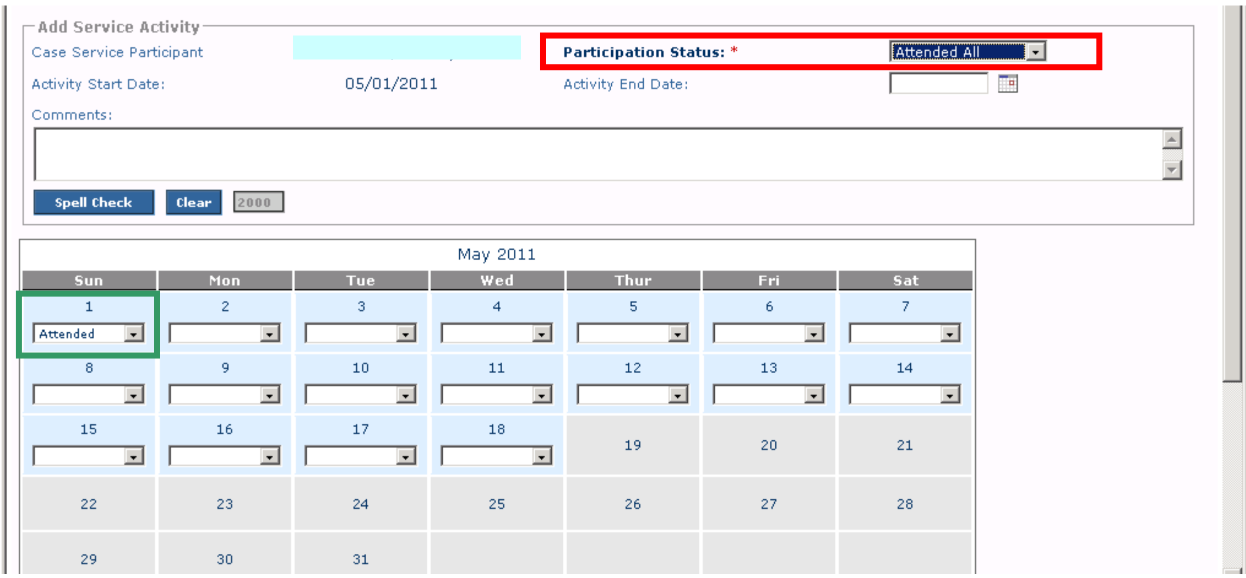
Important: Since May 1st was selected in the **Activity Start Date** field on the previous screen, the calendar only displays from that start date to the current date as shown below (in light blue). The other dates are grayed out. The calendar only displays a maximum of 90 days.

7. In the **Participation Status** field, select the appropriate choice from the drop-down list. The choices are **Attended All**, **Partial Attendance**, and **Not Attended**.

Important:

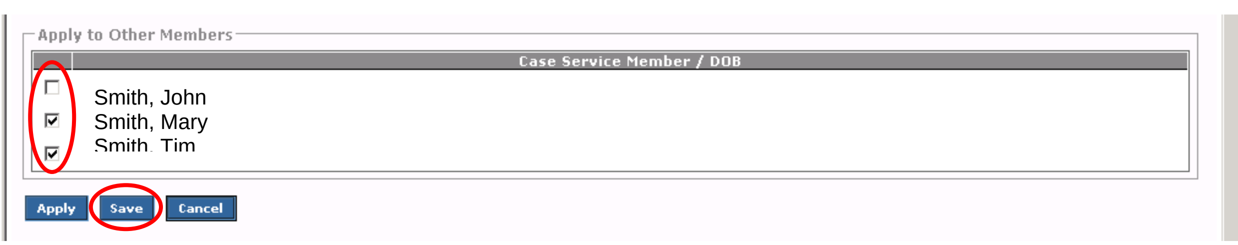
- The participation status must be added once during every case review period.
- Completing the **Participation Status** field is required to save the record; completing the calendar is not.

8. If needed, for each enabled calendar day in the **Calendar** section, select **Attended** or **Not Attended** from the drop-down list. An example for May 1st is shown in green below.



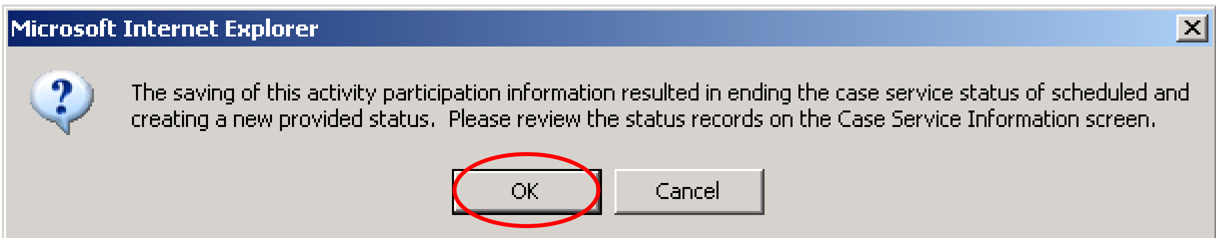
Important: You can also apply this information to other case members within that service by completing these steps:

9. Scroll to the **Apply Other Members** section (below the calendar).
10. Select the appropriate case member check box(es).
11. Click the **Save** button.

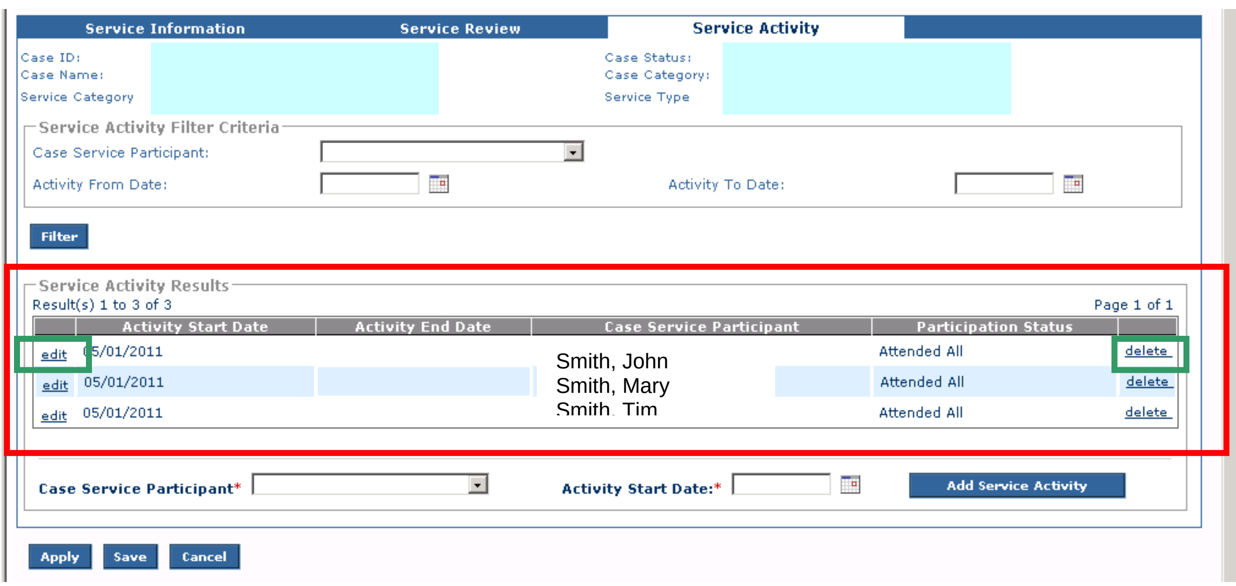


Managing Case Services

12. If the following warning message appears, click the **OK** button. Clicking OK saves and end dates the scheduled status record, as well as creates provided status records for all selected members.



The **Service Activity Filter Criteria** screen appears displaying the **Service Activity Results** section below it. The selected case member(s) now have a new service activity record as shown below.



From this screen:

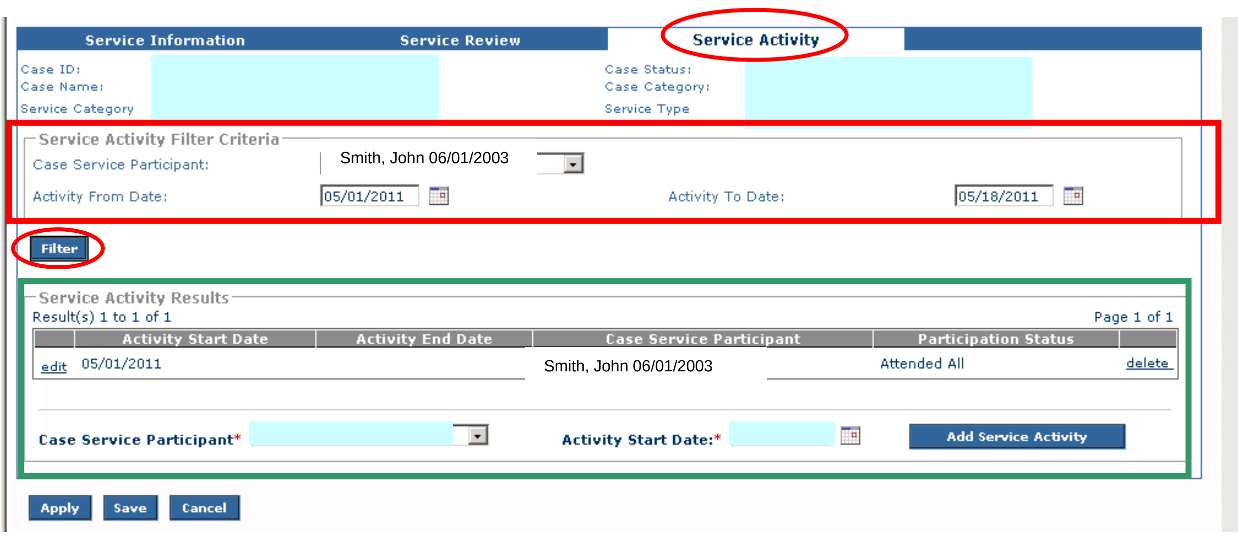
13. To edit a record, click the **Edit** link on the left (shown in green). After editing the record, click the **OK** button again.
14. To delete a record, click the **Delete** link on the right. Then, click the **OK** button.

Managing Case Services

Filtering Service Activity Records

To filter the service activity records by **case member** or **activity from and to date**, complete the following steps:

1. Navigate to the **Service Activity** tab (steps discussed previously).
2. At the top of the screen, select the case member's name from the **Case Service Participant** field drop-down list.
3. In the **Activity From Date** field, enter the appropriate date.
4. In the **Activity To Date** field, enter the appropriate date.
5. Click the **Filter** button.



The filtered results appear in the **Service Activity Results** section as shown in green above.

6. If needed, click the **Cancel** button to return to the **Case Services** screen.

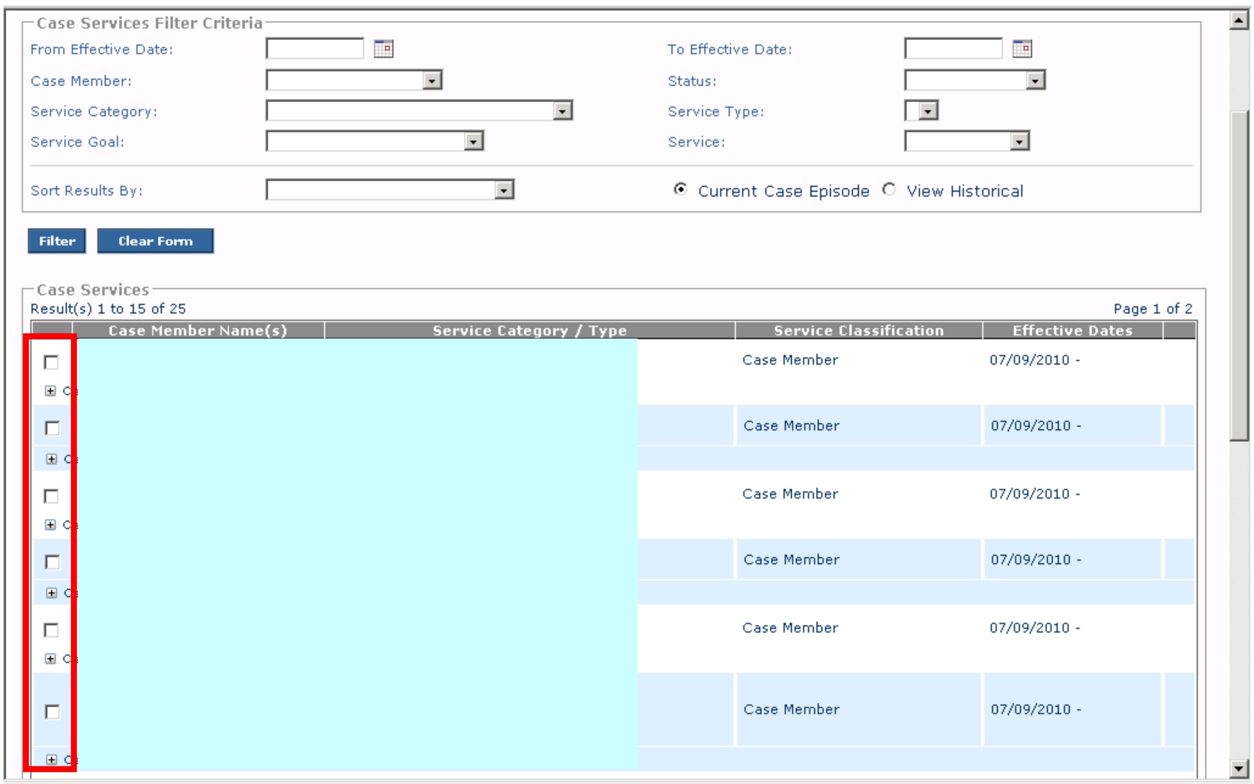
Managing Case Services

Linking a Case Service to a Work Item

You can link a case service to a work item in SACWIS. Although case service functionality in some parts of the system have changed, **the current steps for linking a case service are still the same as they were in previous versions of SACWIS.**

You can also link a case service for one member or many members as shown below.

Example 1: If you navigate to the **Case Services** screen through a work item to link case services, you can select every case member for this service by selecting the appropriate check box(es).



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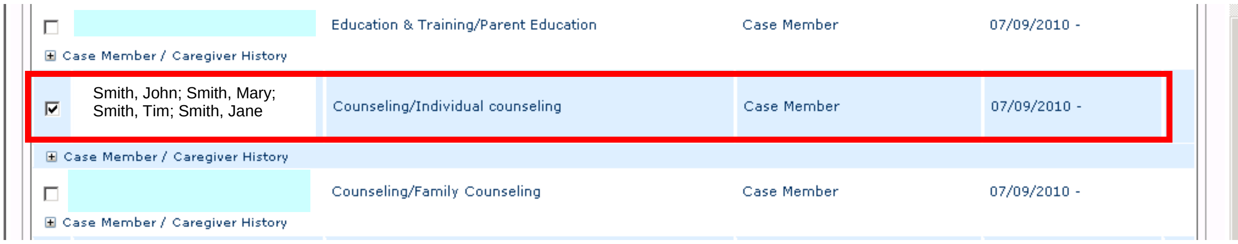
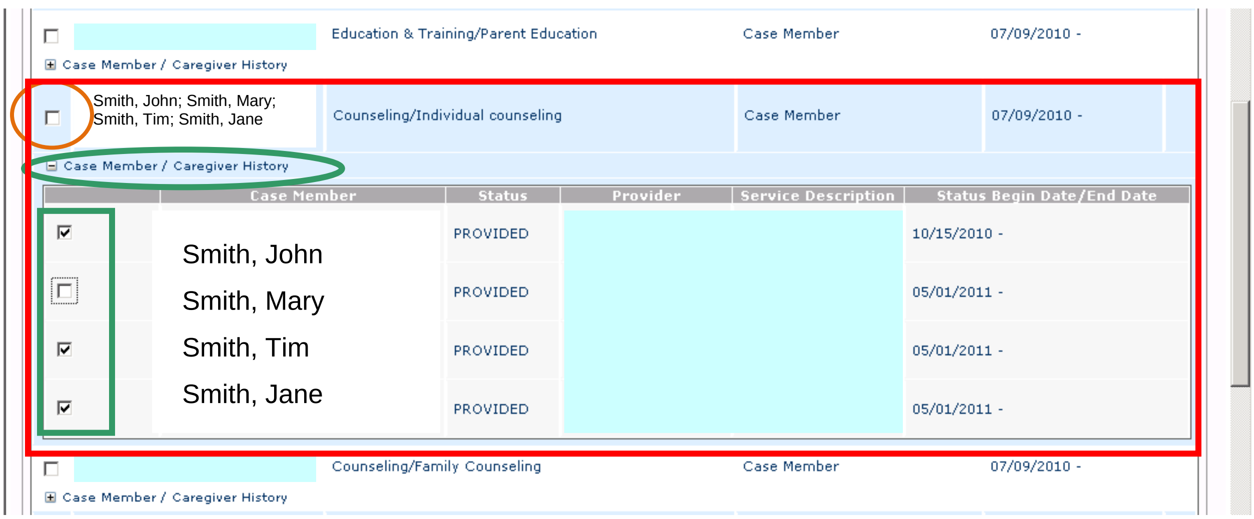
Example 2: If multiple case members appear in one row, you can click that check box to select all of the names.



Example 3: If multiple case members appear in one row but you only want to select some of them, you can:

1. Click the **Case Member / Caregiver History** link to expand the names.
2. Click the check boxes for only the case members you want to select.
3. To select all case members, click the row's main check box (circled in orange).

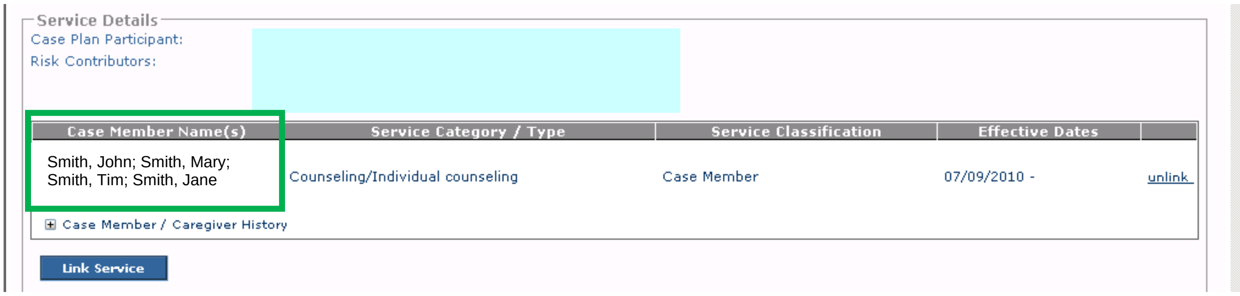


4. Click the **OK** button at the bottom of the screen.

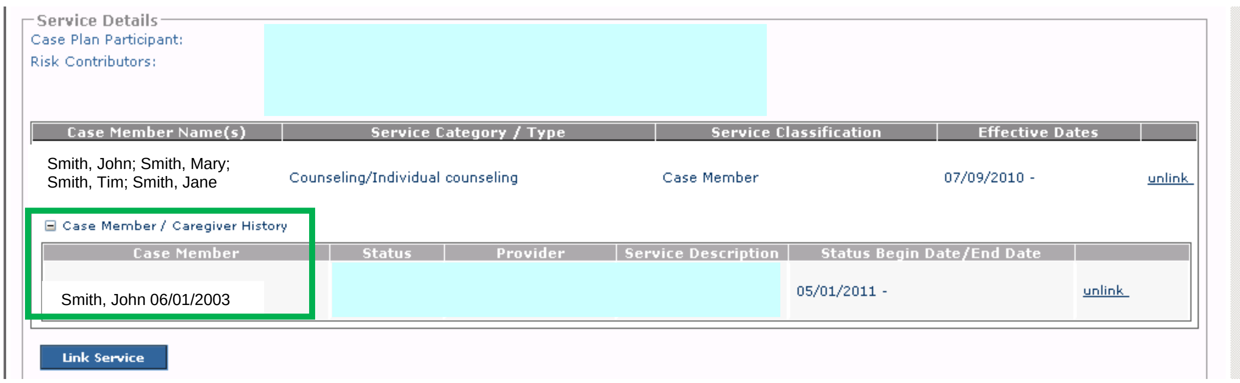
The **Service Details** screen appears.

Managing Case Services

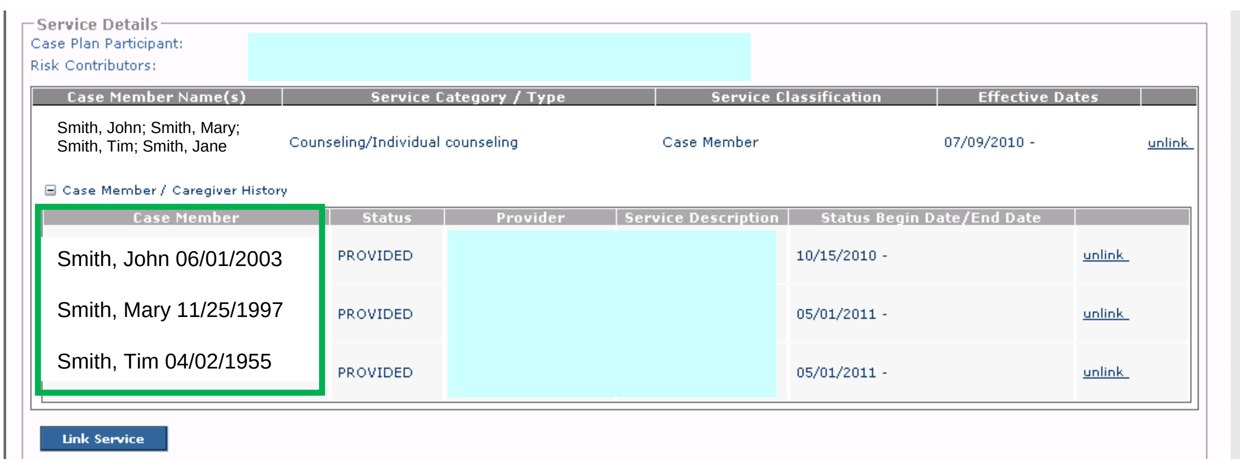
As shown in this example, the screen still displays **all of the case members**.



However, if you expand the **Case Member / Caregiver History** link, the screen now displays only the selected member (or members) as shown below:



Or, the selected multiple members as shown below:



Case Closure

When closing a case, you must end date all paid case services. The system will automatically end date all non-paid case services with the case closure date. This is the same functionality that currently exists in SACWIS.

Case Services with a Status of Planned

For case services on closed cases or previously opened episodes that have a case member service status record of **Planned**, the case member service status record will remain as **Planned** in the system.

For case services on open cases that have a case member service status record of **Planned**, the case member service status record will be changed to **Referred** in the system.