Recording an OhioKAN Release of Information

Knowledge Base Article

Table of Contents

Ohio | Department of Job and Family Services

Recording an OhioKAN Release of Information

Overview

This article provides step-by-step instructions for recording receipt of a signed OhioKAN Release of Information. The Release of Information allows access to a person's information within SACWIS.

Important: A Release of Information record must only be recorded in SACWIS when the OhioKAN agency is in possession of a Release of Information with the original signature of the adult person or the child's parent/guardian/custodian.

Adding a Release of Information Record

Note:

- Release of Information records are per person
- Records expire at 12 months, unless otherwise noted
- Records may be revoked at any time
- Records can be marked as Created in Error
- Records automatically expire when the case is closed

1. From the SACWIS home page.
2. Search Case.
3. Click on the **Release of Information**

Note: The first time a Release of Information record is created, the system will display the message: **No Release of Information recorded**.

4. Select the desired name from **Person** Dropdown
5. Click the **Add New Release of Information** button.
6. The Maintain Release of Information page displays.

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Maintain Release of Information

CASE NAME / ID: *Petal, Rose*   *OhioKAN / Open (05/29/2020)*

Release of Information Details

Petal, Rose   Female Age 65, DOB 05/05/1955

Effective Date: *   End Date: *

This release will expire 12 months from the effective date unless case is closed or release is revoked, whichever comes first.

Created By: Archer, Jeffrey Navigator   Created Date: 06/05/2020
Modified By: Archer, Jeffrey Navigator   Modified Date: 06/05/2020

Status:* Active   Apply   Save   Cancel

7. Record the **Effective Date**.
   Note: The End Date will default to one year from the Effective Date. If a different date was documented on the signed Release of Information form, enter the correct End Date.
8. Click **Save**.
9. Repeat steps 1-8 for each person that has a Release of Information.

Release of Information Statuses

Active:
- This is the default status when a new Release of Information record is created.
- This status reference value is system-derived.
- When the status is Active, only the end-date and status may be edited.
- When the Release of Information record is Active, all OhioKAN agency users will have access to additional Person Record information, for example:

    - Characteristics tab in Profile
    - Education
    - Medical
    - Employment
    - Military
    - Background
    - Delinquency

Expired:
- This status reference value is system derived.
- The Release of Information will automatically expire 12 months from the effective date (unless the case is closed or release is revoked, whichever comes first).
- The system will set the status to expired when the system date is equal to or greater than the end-date.
- When the status is expired, the record is view only.

Ohio | Department of Job and Family Services   Last Revised: 06/22/2020

Recording an OhioKAN Release of Information

Revoked:
- This status reference value is user-selected.
- When this status is selected, the system will set the end-date to system date. Even if the user updates the end-date, the system will maintain the system date when the record is saved.
- When the status is revoked, the record is view only.

Created in Error:
- This status reference value is user selected.
- When this status is selected, the system will set the end date to system date. Even if the user updates the end date, the system will maintain the system date on the save.
- When status is Created in Error, record is view only.

Changing the Release of Information Status
1. Navigate to the case
2. Click on **Release of Information** Link
3. Click **Edit** on the desired Release of Information record.
4. Select the desired **Status** based on the statuses listed above.
5. Click **Save**.

If you need additional Information or assistance, please contact the SACWIS Helpdesk at: 614-466-0978, select #3, then Select #5.

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