Creating and Linking an OhioKAN Intake

Knowledge Base Article

Creating and Linking an OhioKAN Intake

Last Revised: 05/16/2023

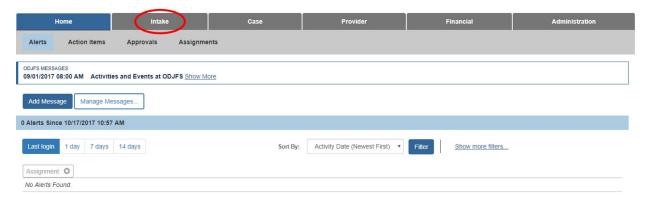# Creating and Linking an OhioKAN Intake

Overview

This article describes the steps for recording an OhioKAN Intake and linking it to a Case. An Intake documents a request or referral for OhioKAN services and is the first step to opening a Case.

Creating an OhioKAN Intake

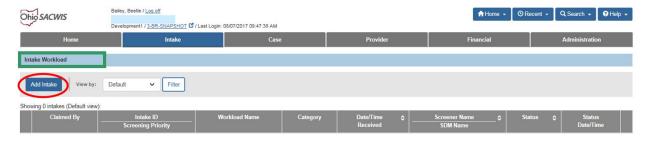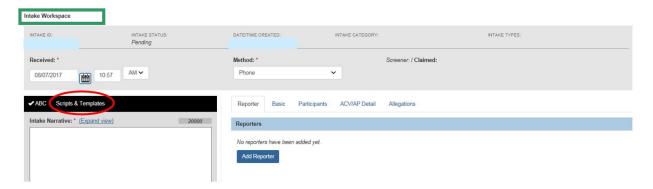From the Ohio SACWIS Home Screen:

1. Click the **Intake** tab.

The **Intake Workload** screen appears.

2. Click **Add Intake**.

The **Intake Workspace** screen appears.

3. Click **Scripts & Templates.**

Ohio | Department of Job and Family Services

Creating and Linking an OhioKAN Intake

The **Select template option** page appears, with OhioKAN selected.

4. Click the **OhioKAN** link.

Select template option: OhioKAN ▾

OhioKAN

☐ Select All   Copy Selected to Narrative
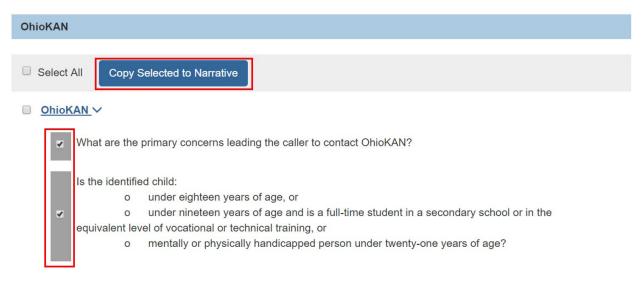
☐ **OhioKAN** ⌄

The link expands to show a list of guiding questions for the narrative related to OhioKAN. You can copy the questions into the narrative field, if desired, following the steps below.

Note: The narrative field is where the details about the referral/request for services should be documented. The narrative remains fully editable while the Intake is in pending status.
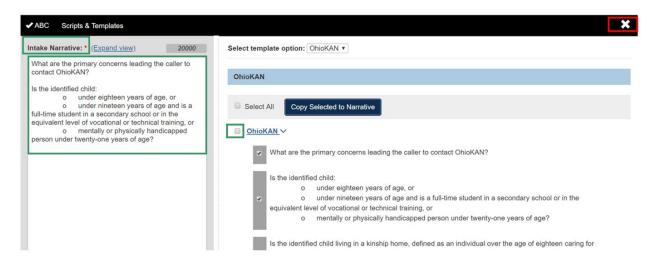
5. Select a specific question(s) by placing a checkmark(s) in the checkbox(es) beside the question(s).
6. Click, **Copy Selected to Narrative**.

OhioKAN

☐ Select All   Copy Selected to Narrative

☐ **OhioKAN** ⌄

☑ What are the primary concerns leading the caller to contact OhioKAN?

☑ Is the identified child:
   o   under eighteen years of age, or
   o   under nineteen years of age and is a full-time student in a secondary school or in the equivalent level of vocational or technical training, or
   o   mentally or physically handicapped person under twenty-one years of age?

The questions you selected appear in the **Intake Narrative** grid.

Note: If you place a checkmark in the checkbox beside OhioKAN, the entire list of questions will be placed in the Intake Narrative field.

7. Click the "x" on the right side of the section header to exit the scripts/templates section to return to the tab view.

Ohio Department of Job and Family Services

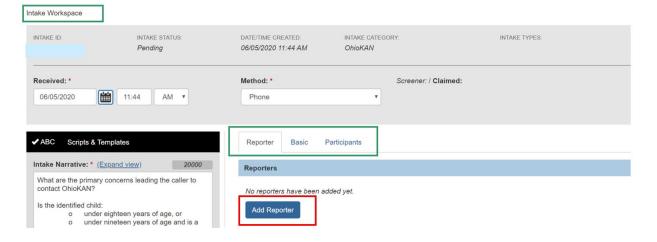The **Intake Workspace** screen appears with the tabbed view.

Important: Intake has an autosave feature, which includes saving the Narrative every 30 seconds as you are typing, and saving the intake whenever you move to a new tab. Autosave is activated when you first do any of the following:

- Click **Apply**.
- Click **Basic** or **Participants** to move to one of those tabs, or
- Click **Save**

Important: Once an Intake has been saved, it cannot be deleted.

Completing the Reporter Tab

1. Click **Add Reporter**.
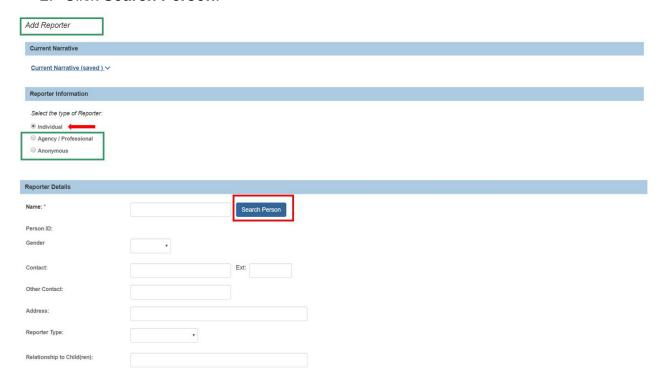
Creating and Linking an OhioKAN Intake

The **Add Reporter** screen appears.

Note: The **Reporter** is the person who is requesting OhioKAN services for themselves or someone else, or who is making an inquiry about the program.

Note: The **Reporter Information** section will default to **Individual**. If the reporter is contacting OhioKAN in their capacity as a professional or representative of a community or government agency, select the **Agency/Professional** radio button. If the reporter does not wish to identify themselves, select **Anonymous** and skip to step 13 below.
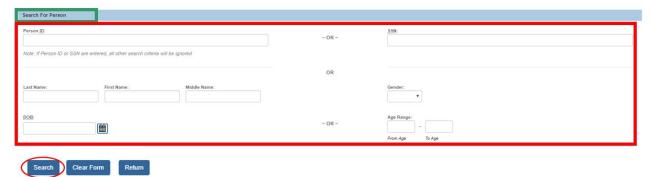
2. Click **Search Person**.

The **Search For Person** screen appears.

3. Enter the **Last Name** and **First Name** of the Reporter, and any other search criteria.
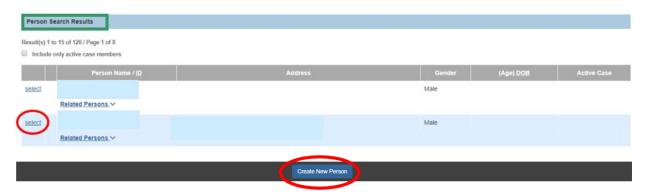4. Click **Search**.

Note: For more information on search functionality, please see the article, Using Search Functionality.

Ohio | **Department of Job and Family Services**
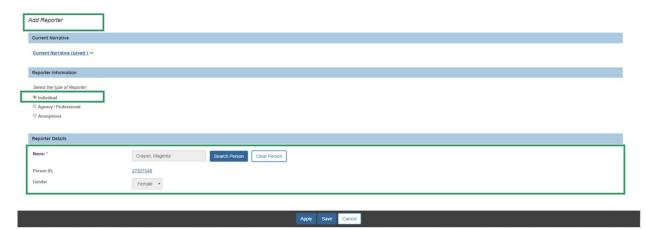
Creating and Linking an OhioKAN Intake

The results appear in the **Person Search Results** section.

5. Click **select**, beside the appropriate person's name.
6. If the Person does not exist in Ohio SACWIS, click **Create New Person,** and refer to the **Creating a New Person** section later in this article.

Important: It is critical to perform a comprehensive person search and be certain that the individual does not already exist in Ohio SACWIS before proceeding to creating a new person. You should always select an existing Person ID if you find a match with the name, birthdate and/or address. Failing to utilize an existing match in Ohio SACWIS will create unnecessary duplicates in the system. If the Reporter is an Adoptive Parent or Kinship Caregiver, it is highly likely they already exist as a Person ID in Ohio SACWIS.

The **Add Reporter** screen appears, displaying the selected Person's information.

If the type of Reporter is **Individual**, go to step 11.

If the **type of Reporter** is **Agency/Professional**, affiliated with any agency or organization, additional fields will display to capture the **Organization Name**, **Organization Address**, and **Organization Contact**. Follow steps 7-10 below to link the agency or organization to the record.

If the Reporter is a Professional who is not affiliated with any agency, click the **Reporter is a solo practitioner** checkbox and go to step 11.

Ohio | Department of Job and Family Services

If the type of Reporter is **Individual**, go to step 11.
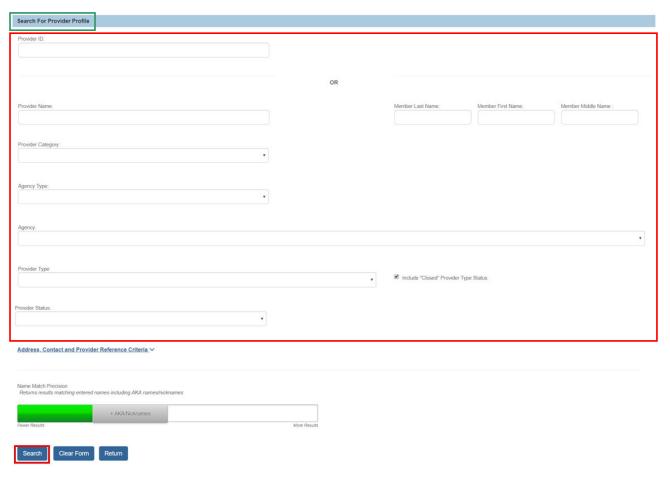
1. Click **Search Provider**.

The **Search For Provider Profile** screen appears.

2. Enter search criteria.

Note: Provider Category is required. The category options are as follows:

*   **Agency Contract**: A Public Children Services Agency (PCSA), private child placing agency (PCPA), or private non-custodial agency (PNA) certified by ODJFS.

*   **Residential**: A licensed Children's Residential Center.

*   **Non-ODJFS**: This category includes all other providers, such as schools, day care centers, physicians, mental health agencies, hospitals, health departments, volunteer organizations, other government agencies, etc.

3. Click **Search**.

Ohio | **Department of Job and Family Services**

Creating and Linking an OhioKAN Intake

The **Search Results** grid appears.

4. Click **select** beside the agency/organization with which the Reporter is affiliated.

Note: If the Provider is not in Ohio SACWIS, Click **Add Non-ODJFS Provider** and follow the steps in this article: Creating a Non-ODJFS Provider.

The **Add Reporter** screen appears, showing the selected organization information.

5. In the **Reporter Type** field, select the appropriate value from the drop-down menu.

6. Enter the **Relationship to Child(ren)** in the text box.

Note: This refers to the relationship of the reporter to the kinship or adopted child.

Ohio | Department of Job and Family Services
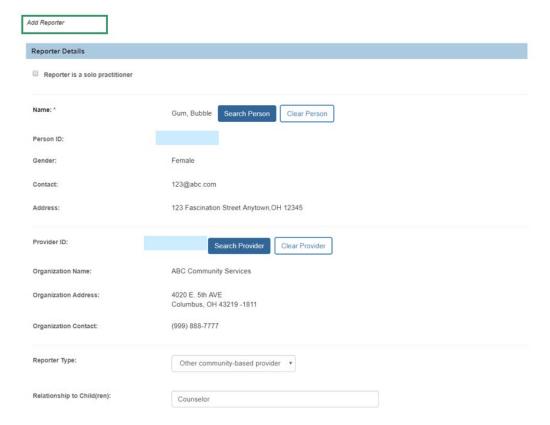
Creating and Linking an OhioKAN Intake

Note: In the **Contact & Situation Knowledge** section, the **Contact Method** defaults to Phone. If the reporter contacted OhioKAN in another way, select the appropriate **Contact Method** from the drop-down menu.
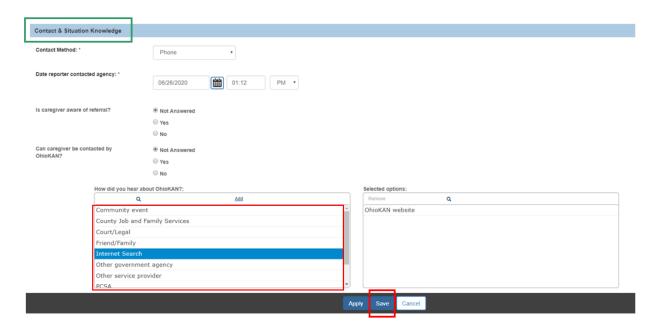
Note: The **Date reporter contacted agency** field defaults to the date and time the Intake was created. If the contact was earlier, enter the correct date and time.

7. Select Yes or No response to **Is caregiver aware of referral?**

8. Select Yes or No response to **Can caregiver be contacted by OhioKAN?**

Note: The questions referenced in steps 7 and 8 will automatically be set to Yes when the Reporter Type is Adoptive Parent or Kinship Caregiver.
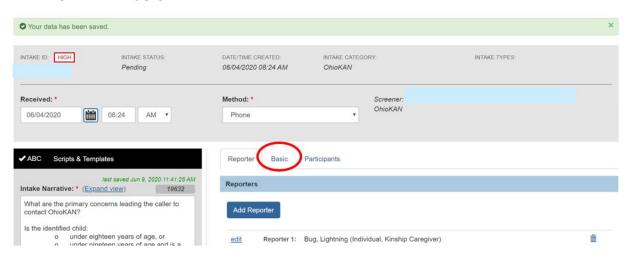
9. Select all applicable values in the **How did you hear about OhioKAN?** grid (this will activate the Add feature).

10. Click **Add** to move the values to the **Selected options** grid.

11. Click **Save**.

Ohio **Department of Job and Family Services**

The **Intake Workspace** screen appears, displaying the message: **Your data has been saved**.

> 12. Click the **Basic** tab.

The **Basic** tab screen appears.

Completing the Basic Tab

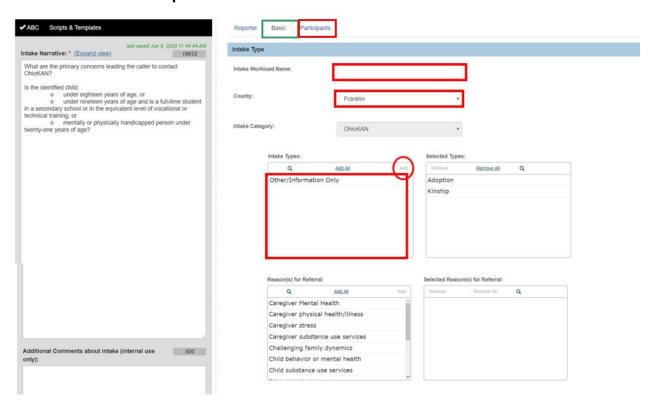> 1. Enter an **Intake Workload Name**, if desired.

Note: An Intake Workload Name will display on the Workload page and may make it easier to find a specific intake in the list.
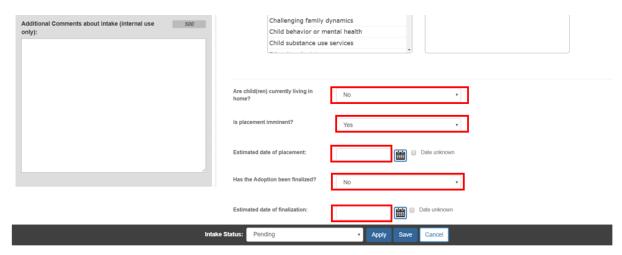
> 2. Select the **County** where the family will receive services from the dropdown menu.

Ohio | **Department of Job and Family Services**

Creating and Linking an OhioKAN Intake

3. Select the applicable option(s) from the **Intake Types** grid (this will activate the Add feature).

4. Click **Add** to move the value to the **Selected Types** grid.

5. Select the applicable **Reason(s) for Referral** from the grid.

6. Click **Add** to move the value(s) to the **Selected Reason(s) for Referral** grid.

7. Select the response in the **Are child(ren) currently living in home?** dropdown.

Note: The remaining questions on this page will display dynamically based on the selected Intake Type(s). Depending on the answers, additional questions may display. All fields shown on the screen must be answered to complete the Intake.

8. Select answer to **Is placement imminent?** from the dropdown, if applicable.

9. Enter **Estimated date of placement** or check **Date unknown** checkbox, if applicable.

10. Select answer to **Has the Adoption been finalized?** from the dropdown, if applicable.

11. Enter **Estimated date of finalization** or check **Date unknown** checkbox, if applicable.

12. Click the **Participants** tab.

Ohio | Department of Job and Family Services

The **Participants** tab screen appears.

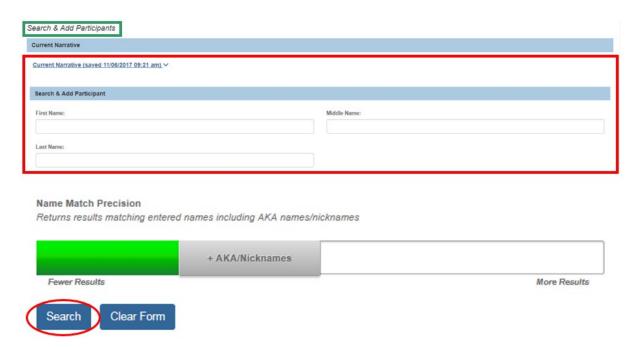## Completing the Participants Tab

Note: If a Reporter was entered with a Reporter Type of Adoptive Parent or Kinship Caregiver, that person will automatically be added as an Intake Participant and display on the tab.

1. Click **Search & Add Participants**.

The **Search & Add Participants** screen appears.

2. Fill in available information.
3. Click **Search**.

Creating and Linking an OhioKAN Intake

The results appear in the **Search Results** section.

Note: For more information, please refer to the article, <u>Adding Intake Participants</u>.

Important: It is critical to perform a comprehensive person search and be certain that the individual does not already exist in Ohio SACWIS before proceeding to creating a new person record. If it's known the family has been involved with a PCSA previously, it is likely they already have a person record in Ohio SACWIS and it's imperative to use the same person ID already created for them. Failing to utilize an existing match in Ohio SACWIS will create unnecessary duplicates in the system.

Note: If the person does not have an existing record in Ohio SACWIS, please skip to the **Creating a New Person** section below; otherwise, proceed to the next step.

4. Place a checkmark in the checkbox next to the appropriate individual's name.
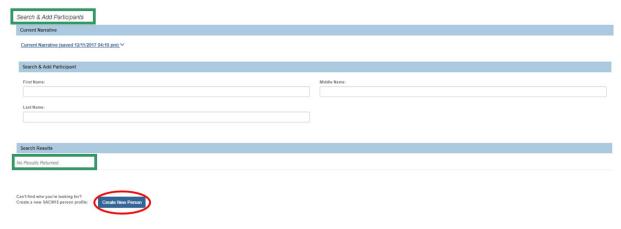5. Click **Add Selected To Intake**.

Creating a New Person

Important: If it's known the family has been involved with a PCSA previously, it is likely they already have a person record in Ohio SACWIS and it's imperative to use the same person ID already created for them. Failing to utilize an existing match in Ohio SACWIS will create unnecessary duplicates in the system.

If your search does not return the appropriate results:

1. Click **Create New Person**.

The **Person Profile** screen appears, defaulted to the **Basic** tab. Information used in the search will be automatically populated to the new Person record.

1. Fill in any required information (denoted with a red asterisk) and any other available information under each heading.
2. Click **Save**.

The **Person Overview** screen appears, displaying the following message: **Your data has been saved**.

3. Click **Close**.

Ohio | **Department of Job and Family Services**

The **Intake Workspace** screen appears, with the **Participants** tab in view, displaying the added individual.

Adding Participant Roles

1. Click **Participant Roles**.

The **Modify Participant Roles** screen appears displaying all Intake Participants and available Roles. On this screen you can either:

- Select an individual Participant and assign one or more Roles to that person, OR

- Select multiple Participants and assign one or more Roles to all selected Participants.

2. Click the **Current Narrative** link if you wish to display the Intake Narrative on this detail screen for reference or editing. (Optional)

Ohio | **Department of Job and Family Services**
Last Revised: 05/16/2023

Creating and Linking an OhioKAN Intake

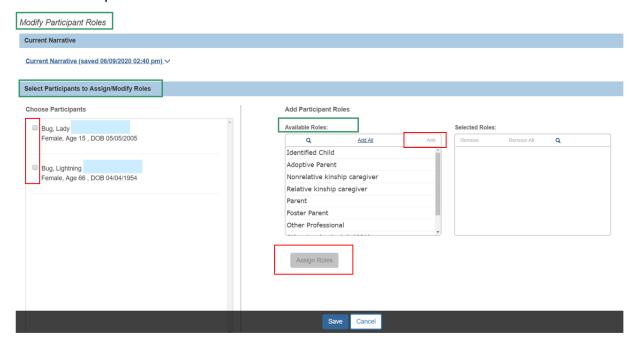3. In the **Select Participants to Assign/Modify Roles** grid, place a checkmark in the check box beside each Participant to whom you wish to assign a particular role(s).

4. From the **Available Roles** list:

   a. Click the **Available Roles** you wish to assign to the selected Participant(s). Once you make a selection from the Available Roles list, the **Add** feature will be enabled.

   b. Click **Add** to move the Role(s) to the **Selected Roles** list.

   c. Repeat this step for any additional roles you wish to assign.

Note: If you move a role in error, select it in the **Selected Roles** list and click the **Remove** link to move it back to the **Available Roles** list.

5. When you have selected the appropriate roles, the Assign Roles button will be enabled. Click the **Assign Roles** button to assign the Selected Roles to the selected Participants.

The **Choose Participants** section displays the roles that have been assigned for each Participant.

6. If you assigned a role to a person in error:

   a. Click the **Delete** icon beside the role under the appropriate Participant.

   b. Repeat the steps above to re-assign the person's role(s) as appropriate.

Important: Each Participant must have at least one role to complete the Intake.

Note: The role of **Identified Child** should be used for the kinship and adoptive child(ren) in the home.

7. When the role assignments are complete, click the **Save** button.

Ohio | Department of Job and Family Services

The **Participants** tab screen appears, showing the Participant Roles.

Adding Participant Relationships

Relationships between all intake participants must be specified to complete the intake. When persons are selected, existing relationships are automatically pulled into the intake. Any relationships that have not been specified in Ohio SACWIS will be denoted with an orange dot.

Ohio | Department of Job and Family Services

Creating and Linking an OhioKAN Intake

Important: You can click the **Relationships** link (under an individual's name) to expand a drawer that displays the relationships of that individual to the other people listed.

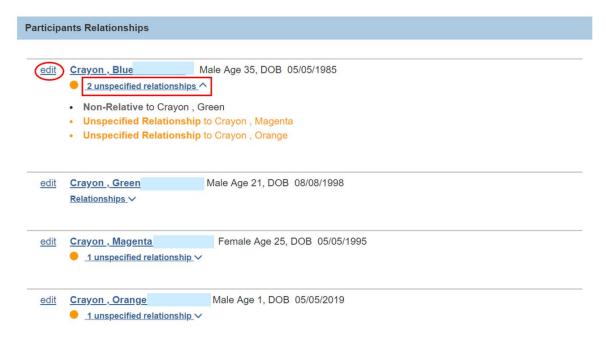If there are individuals in the list set who do not have relationships established with one another, Ohio SACWIS will display the link as **# unspecified relationships** instead of **Relationships** (the pound sign represents the number of unspecified relationships for the individual). Click the **# unspecified relationships** link to expand the drawer displaying that individual's relationships, including unspecified relationships. The unspecified relationships will be denoted with an orange dot and orange text.

Note: Relationships between people may be viewed and maintained from various places in Ohio SACWIS. For more information, refer to this article: [Managing Person-Level Relationships](#)

1. Click **edit** to add or update Relationships for any Intake Participant.

The **Manage Participant Relationships- Editor** page displays.

2. To record an unspecified relationship, or update an existing one, select the applicable Relationship from the drop-down menu under the focus person's name.

Note: The horizontal menu of names on the screen will allow you to update the relationships between one of the other persons in the list set and the other listed individuals. The arrows on either side of the menu allow you to navigate through the names in the list set.

Note: If the gender of the person has been specified on the person record, the values in the menu will be gender specific. When the relationship is selected, the reciprocal is automatically calculated, if possible, and displays as shown in green below.

3. When all Relationships are complete, click **Save**.

Ohio Department of Job and Family Services

The Participants tab screen displays.

Completing the Intake

1. Select **Complete** from the **Intake Status** dropdown menu.

Important: If required information is incomplete, the Intake Status will remain Pending, and a message like the one below will display:

Note: The tab where the missing information is entered is listed in parentheses for each validation message.
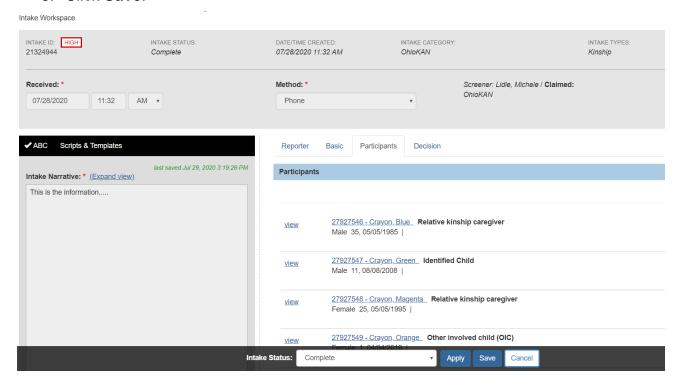
2. Click the appropriate tab(s) and enter the missing information.

Creating and Linking an OhioKAN Intake

If there is no missing information when you select Complete, the **Intake Workspace** displays a status of **Complete**.

Important: If you have screening decision maker security, the **Decision** tab will display. If you wish to record the decision immediately, click **Decision**, and go to the next section, **Recording a Screening Decision**.

3. Click **Save**.

Intake Workspace

INTAKE ID: HIGH	INTAKE STATUS:	DATE/TIME CREATED:	INTAKE CATEGORY:	INTAKE TYPES:
21324944	Complete	07/28/2020 11:32 AM	OhioKAN	Kinship

Received: *
07/28/2020   11:32   AM ▾

Method: *
Phone ▾

Screener: Lidle, Michele / **Claimed:**
OhioKAN

✔ ABC   Scripts & Templates

last saved Jul 29, 2020 3:19:26 PM

Intake Narrative: * (Expand view)

This is the information.....

Reporter	Basic	Participants	Decision

Participants

view   27927546 - Crayon, Blue   **Relative kinship caregiver**
Male 35, 05/05/1985 |

view   27927547 - Crayon, Green   **Identified Child**
Male 11, 08/08/2008 |

view   27927548 - Crayon, Magenta   **Relative kinship caregiver**
Female 25, 05/05/1995 |

view   27927549 - Crayon, Orange   **Other involved child (OIC)**
Female 1, 04/04/2019 |

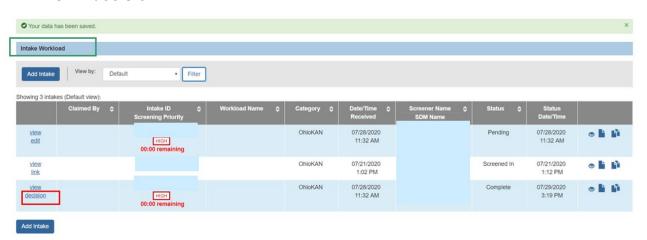**Intake Status:**   Complete ▾   Apply   Save   Cancel

The **Intake Workload** screen appears, displaying the message: Your data has been saved.

Note: If you are not a screening decision maker, your work on the Intake is complete. The Intake will be picked up by a screening decision maker from the Intake Workload, to be screened in or out.

Ohio | **Department of Job and Family Services**

Last Revised: 05/16/2023

Recording a Screening Decision

1. Click **decision.**

The **Intake Workspace** screen appears, with the **Decision** tab in view.

2. Select the **Is this an emergency?** response from the dropdown menu.

Note: Your selection to the above question will populate the **Follow up** field, indicating follow up within 24 hours for an emergency, and 72 hours for non-emergency referrals.
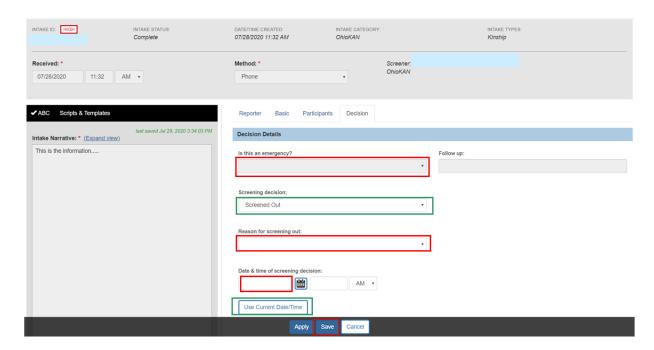
Important: Emergency designation should be based on OhioKAN policies and procedures, including circumstances such as a reported risk of harm or imminent risk of disruption of the child from the home.

3. Select the **Screening decision** from the dropdown.
4. If the decision is **Screen Out**, select the **Reason for screening out**.
5. Enter the **Date & time of screening decision**, OR
6. Click **Use Current Date/Time** to populate those fields.

Note: The **Date & time of screening decision** may be backdated, but must be after the **Received** date and time.

7. Click **Save**.

The **Decision Review** screen appears.

Note: If the Screening Decision is incorrect, click **Cancel** to return to the **Decision** tab and make the needed changes.

8. Click **Confirm Screening Decision** if all the information is correct.

The **Intake Workload** screen appears, displaying the intake with the Status of Screened In or Screened Out.

Linking an OhioKAN Intake to a Case

From the Intake Workload page:

1. Click **link**, beside the appropriate Intake ID.

The **Link to Existing Case** screen displays, showing existing OhioKAN cases in which any of the Intake Participants are already members, if applicable.
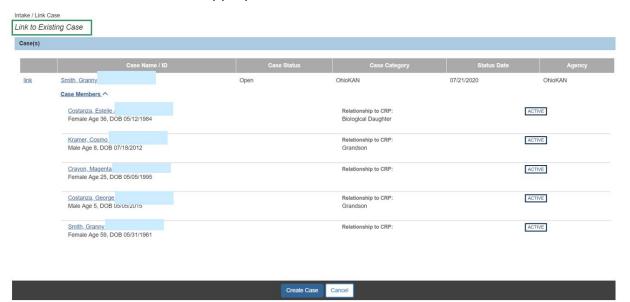
Important: If the appropriate case is not listed, skip to the **Creating a Case** section below.

2. Click the **Case Members** drawer to display a list of the family members in the listed case, to help determine if the Case is a match for the Intake you are linking.

3. Click **link** beside the appropriate Case.

The **Link to Existing Case** screen appears, displaying additional information about the people associated to the selected Case.
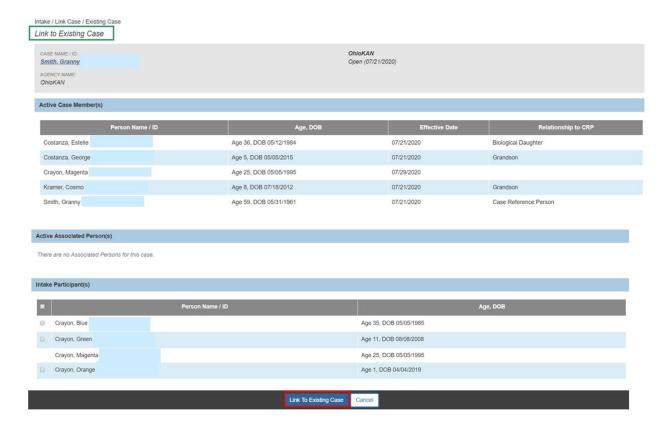
Note: The **Intake Participants** grid lists all the people associated to the Intake you are linking. Persons found in the Intake who are not already found in the Case may be added as **Case Members** via the linking process.

4. Place a checkmark in the check box beside any Intake Participant(s) you wish to add to the Case.

5. Click **Link to Existing Case**.

The **Intake Workload** screen appears, displaying the following message: **Intake #... has been linked to Case #...** as shown below.

Note: The **Case ID number** is a hyperlink to the **Case**. Click the hyperlink if you wish to navigate directly to the Case.

Note: The **Intake** no longer displays in the **Intake Workload**.

Creating a Case

When you click the link hyperlink beside the appropriate case on the Intake Workload screen, the **Link to Existing Case** screen appears. If there is no appropriate Case listed on the **Link to Existing Case** screen, follow the steps below to create a new one.
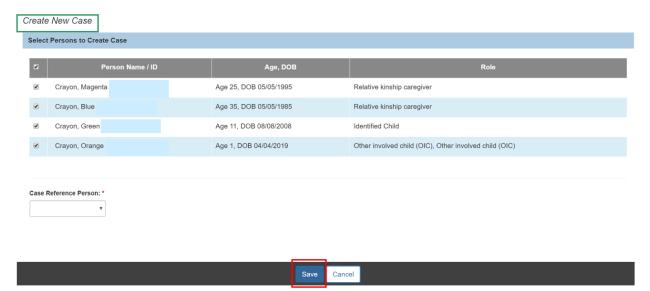
1. Click **Create Case.**

Creating and Linking an OhioKAN Intake

Intake / Link Case

Link to Existing Case

	Case Name / ID	Case Status	Case Category	Status Date	Agency
link	Smith, Granny	Open	OhioKAN	07/21/2020	OhioKAN
	Case Members ⌄				

Create Case   Cancel

The **Create New Case** screen appears.

Note: All Intake Participants are shown in the **Select Persons to Create Case** grid. Those with a checkmark will automatically be added as **Case Members** upon creation of the new **Case**. All participants will default to checked. If any participant should **not** be included as a **Case Member**, uncheck the box beside that person's name.

2. Select the **Case Reference Person** from the dropdown.

Note: The **Case Reference Person's** name and address will be used to identify the **Case**. Usually, this is the primary caregiver in the family. Options in the dropdown include all persons selected to become **Case Members**.

3. Click **Save**.

Create New Case

Select Persons to Create Case

☑	Person Name / ID	Age, DOB	Role
☑	Crayon, Magenta	Age 25, DOB 05/05/1995	Relative kinship caregiver
☑	Crayon, Blue	Age 35, DOB 05/05/1985	Relative kinship caregiver
☑	Crayon, Green	Age 11, DOB 08/08/2008	Identified Child
☑	Crayon, Orange	Age 1, DOB 04/04/2019	Other involved child (OIC), Other involved child (OIC)

Case Reference Person: *

[▾]

Save   Cancel

The **Intake Workload** screen appears, displaying a message confirming the Intake has been linked to the new Case.

Note: Click the **Case ID** hyperlink to navigate directly to the case, if desired.

Note: The linked **Intake** no longer displays on the **Intake Workload** page.

Ohio | Department of Job and Family Services

Creating and Linking an OhioKAN Intake

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at SACWIS_HELP_DESK@jfs.ohio.gov .

Ohio | **Department of Job and Family Services**