

Knowledge Base Article

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Overview

This article describes the steps for generating a Mandated Reporter Letter regarding an Intake. The Mandated Reporter Letter is an intake report used to inform mandated reporters of the status of the agency's assessment/ investigation in response to their reported concerns, a PCSA contact, and the reporter's responsibilities and rights to additional information, per Ohio Revised Code 2151.421.

Important: There are four types of Mandated Reporter Letters that can be generated as applicable to notify the reporter of the status of the referral:

- Initial- referral accepted: This letter is for intakes that have been screened in or screened in AR, to notify the reporter of the status of the assessment/investigation, and to provide updates as needed.
- Initial- referral NOT accepted: This letter is for intakes that have been screened out.
- **Disposition- case transferring for ongoing services**: This letter is used at the conclusion of the assessment/investigation when the decision is to transfer the case for ongoing or prevention services.
- **Disposition- case NOT transferring for ongoing services**: This letter is used at the conclusion of the assessment/investigation when the decision is to close the case.

Navigating to the Case Intake List

A Mandated Reporter Letter is generated from the Case to which the relevant Intake has been linked.

If you have assignment to the Case, from the Ohio SACWIS home page:

1. Click the Case tab.

Home		Intake		Case	Provider	Financial	Administration
Alerts	Act	tion Items	Appro	vals Ass	ignments		

A new sub-menu appears.

2. Click the **Workload** tab.

Home	Intake	Case	Provider	Financial	Administration
Workload	Court Calendar	Placement Request	ts		



The Case Workload grid appears.

3. Select the relevant case.

Home	Intake	Case	Provider	Financial	Administration	
Workload Court C	alendar Placement R	equests				
Case Workload						
Caseworker:	•	Sort By: Case Name A	scending v Filter			
Test, Worker (25 cases)	■ Test, Worker (25 cases)					
B. Sacwis, Susie [<u>123456</u>] - Open 11/21/2022 - Adoption						
] - Open 06/17/2022 - Ongoing					

Or, if you have an Intake ID, but do not know the case name or do not have assignment to the case:

- 4. Click, Search.
- 5. Select Intake Search.

Ohio SACWIS	/ <u>Log off</u> County Children Services B	oard		🔒 Home 👻 🖉 🛛	Recent - Q Search -	🕄 Help 👻
Home	Intake	Case	Provider	Financial	Intake Search Case Search	on
Workload C	ourt Calendar Placement Re	quests			Provider Search Provider Match Employee Search	
Case Workload Caseworker:	~	Sort By: Case Name	Ascending 🗸 Filter		Agency Search	

A confirmation message appears.

6. Click OK.



The Search for Intake screen appears.

- 7. Enter the Intake ID.
- 8. Click Search.



Search For Intake	
Intake ID:	
Name Match Precision Returns results matching entered names including AKA names/nicknames	Sort By:
+ AKA/Nicknames	
Fewer Results More Result	3
Search Clear Form	

The Search Results grid appears.

9. In the Search Results grid, click the Case Name/Case ID hyperlink.

Search	Results							
Result(s) 1	to 1 of 1 / F	Page 1 of 1						
	Intelia	Intelia	Data / Time	Intoka Catagony	0 N ID	Carriera		
	<u>ID</u>	Status	Received	/ Type	Case Name/Case <u>ID</u>	Screener Name SDM Name	Agency	

The **Case Overview** screen appears.

10. Click the Intake List link in the navigation pane.

<u>Case Overview</u> <u>Activity Log</u> <u>Intake List</u>	CASE NAME / ID: Sacwis, Susie / 12345	6	Assess/Invest	
Safety Assessment Substance Abuse Screening Forms/Notices	ADDRESS: 123 Test Rd Test, Oh 12345	٥	CONTACT:	
Categony/Pathway Switch Safety Plan Actuarial Risk Assessment	AGENCY: Test County Children Services Board PRIMARY WORKER:		SUPERVISOR(S):	

The Intake List screen appears.



Important: If the assessment/investigation initiation activity log has been completed, the **Initiation Date/Time** displays in the Intake List grid. When this column is blank, the initiation has not been recorded. This information will help to complete the Mandated Reporter Letter details in a later step.

1. Click the **reports** link for the Intake.

Current C	ase Episod	le Intake List						
Intake <u>ID</u>	Status 📚	Decision 🗘 Date - Time	Category 🛟	Туре	Initiation Date/Time	Case Disposition Disposition Date	Investigation/ Assessment Completion Date	Agency Name 💲
<u>123456</u> reports	Screened In	05/21/2004 03:00 PM	CA/N Report	Physical Abuse	05/22/2004 01:00 PM			Test County Children Services Board

The **Reports** screen appears.

- 2. From the **Generate Document** drop-down menu, select, **Mandated Reporter** Letter.
- 3. Click Select.

Reports		
Work-Item Type:	CASE	Work-Item Reference:
Task Type:	INTAKE	Task Reference:
Available Documents		
Generate Document:	Mandated Reporter Letter	v
Select Cancel		

The **Document Details** screen displays.

4. Click Generate Report.

Document Details				
Document Category:		Document Title:	Mandated Reporter Letter	
Work-Item ID:		Work-Item Reference:		
Task ID:		Task Reference:		
Document History				
ID	Date Created	Employe	ee <u>ID</u>	Name
ID	Date Created	Employe	e ID	Name
	Date Created	Етрюуе	e <u>ID</u>	Name
ID Document History	Date Created	Етрюуе	e ID	Name



The Mandated Reporter Letter parameters page displays.

Completing the Report Details

Important: There are four types of Mandated Reporter Letters that can be generated from this page as applicable to notify the reporter of the status of the referral.

- Initial- referral accepted: This letter is for intakes that have been screened in or screened in AR, to notify the reporter of the status of the assessment/investigation, and to provide updates as needed.
- Initial- referral NOT accepted: This letter is for intakes that have been screened out.
- **Disposition- case transferring for ongoing services**: This letter is used at the conclusion of the assessment/investigation when the decision is to transfer the case for ongoing or prevention services.
- **Disposition- case NOT transferring for ongoing services**: This letter is used at the conclusion of the assessment/investigation when the decision is to close the case.
- 1. From the **Mandated Reporter Letter Type** drop-down menu, select the applicable type.
- 2. From the **Case Worker** drop-down menu, select the name of the worker whose information will display in the letter.

Note: For the **Initial- referral NOT accepted** letter, no additional fields display on the screen; please go to step 5 below.

3. For each question in the grid, select **Yes** or **No** as applicable from the drop-down menus.

Note: Each question in the grid defaults to No.

Note: When the agency has initiated the report and documented this in an Ohio SACWIS Activity Log, the **Intake List** grid shown in the previous section will display the **Initiation Date/Time**. When this column is blank, the initiation has not been recorded.

4. In the text field, enter a response to Please detail the general status of the health and safety of the child who is the subject of the report.

Note: If the status of the health and safety of the child is not known at the time the letter is generated, a general statement that the assessment has not been completed is acceptable.

5. Click Generate Report.



Mandated Reporter Letter	
Mandated Reporter Letter	
Case Worker: *	
Please answer the following questions	
Has the agency Initiated the report? *	Nov
Is the agency continuing to investigate the report? *	Nov
Is the agency otherwise involved with the child who is the subject of this report? *	Nov
Did the report result in the filing of a complaint in Juvenile Court or criminal charges in another court?*	Nov
Please detail the general status of the health and safety of the child who is the	e subject of the report. *
Spell Check Clear 1000	2





The Report PDF displays.

- 6. Click Save to save the report.
- 7. Click the print icon to print the report.

Note: If changes or corrections to the letter are needed, click **Review Parameters** to return to the previous screen. Or, click **Cancel** to leave without saving.



The Intake List screen appears.

Accessing a Saved Mandated Reporter Letter

From the Intake List within the Case,

1. Click the **reports** link.

Case Overview Activity_Log Intake List Safety_Assessment Substance Abuse Screening	CASE NAME / ID: Assess/Invest Sacwis, Susie / 123456 Current Case Episode Intake List								
Forms/Notices Category/Pathway Switch Safety Plan	Intake ID	Status 📚	Decision 🛟 Date - Time	Category 🛟	Туре	Initiation Date/Time	Case Disposition Disposition Date	Investigation/ Assessment Completion Date	Agency Name 💲
Actuarial Risk Assessment Family Assessment Ongoing Case A/I	123456 reports	Screened In	05/21/2004 03:00 PM	CA/N Report	Physical Abuse	<u>05/22/2004</u> 01:00 PM			Test County Children Services Board

The Reports screen appears.

- 2. From the Generate Document drop-down menu, select Mandated Reporter Letter.
- 3. Click Select.

Reports		
Work-Item Type:	CASE	Work-Item Reference:
Task Type:	INTAKE	Task Reference:
Available Documents		
Generate Document:	Mandated Reporter Letter	~)
Select Cancel		

The **Document History** grid displays, showing all the **Mandated Reporter Letters** that have been generated for the specified Intake.

4. Click the **PDF ID** link to open the document.

tarteni Category 4: Gan (2) 9: 5) Gunant Matory		Document Title Work-Jean Bahrenne Task Reference	thedaal Ngorio Leter Dec. Jew
	One Owned	Engineer	D Name
indena 🐨	00:0+0431 88 17 PM	2018/202	Calenoles, Caley
Access of the second se	100040001 04 14 190	an area and a second se	Carrothe Carry
azanca 📸	00/20/2021 00:13:466	2010/988	Caerveter Caery
example Pallery			
Services Report			

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