Using Ohio SACWIS as a Youth Navigator

Ohio *SACWIS*

&

YOUTH NAVIGATOR NETWORK

Knowledge Base Article

Using Ohio SACWIS as a Youth Navigator

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Overview

This article provides an introduction of the Ohio Statewide Automated Child Welfare Information System (commonly known as Ohio SACWIS) and the functionality it contains for use by the Youth Navigator Network. Links to different resources and applicable Knowledge Base Articles (KBAs) are included.

Logging In

1. Proceed to the website Statewide Automated Child Welfare Information System (ohio.gov)

2. Click the blue **Log In** button

The myohio.gov website appears.

3. Enter in your 8-digit **OH|ID Workforce User ID:**

4. Enter in your **OH|ID Password:**

5. Click the **Log In** button.

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Ohio SACWIS Home

This is the screen that displays when you first login to Ohio SACWIS; when you select the **Home** tab; and by clicking on the Home button in the header, and selecting the Home link. This screen is often referred to in online help topics as one of the first steps you can take when navigating to a specific record, process, and work task.

This screen displays broadcast messages added by the state and/or your agency. It also displays Alerts that are actions taken on specific work items/records.

The Home screen is one of the primary screens you will use when managing staff and work action items for yourself and/or your team.

Besides Broadcast Messages and Alerts, the subheading displays additional tabs to view and manage Approvals, and Assignments.

You will navigate from this screen to functional areas (Intake, Case, Provider, Financial or Administration); use the Recent button to go directly to a recently accessed record; select the Search button to search for a specific person, intake, case, provider, employee and agency; and use the Help button to reference online help assistance.

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Getting Around in SACWIS

You navigate Ohio SACWIS like most Web-based, online forms. The application appears in a Web browser, most likely Chrome or Internet Explorer.

> 📌 Note
>
> **DO NOT** open more than one instance of Ohio SACWIS at a time. Working between two instances will corrupt information in the Ohio SACWIS database. Do all your work in one instance. (If you want to copy narratives from one record to another, copy the text and paste it in a Word or text file. Then copy it from the Word or text file and paste it into the new location.)

Navigating in SACWIS

Your browser's navigation bar appears above the Ohio SACWIS menu. Remember, the tools in your browser are used for navigating the Internet or an Intranet. These tools **do not** control the functions within Ohio SACWIS, so you must not use them while you're in the system.

> 📌 Note
>
> **DO NOT** use the **Back** and **Forward** buttons in your browser's navigation bar. Use only the buttons and links within the application screen to move from one screen to another. Use only the **log off** link to close Ohio SACWIS, not the X in your web browser window.

To navigate in SACWIS, you will click the buttons, or select from the links provided on the screen. To get out of a record, or off a screen you will select from the buttons. You must use these as alternatives to the **Back** arrow or button:

- Click the **Apply** button. This applies the data entered to the record, takes you to the top of the screen within the record so you can continue in the process task.

- Click the **Save** button. This saves the data entered to the record, and takes you out of the record, most often back to a list page.

- Click the **Cancel** button and click **OK** in the dialog box. This returns you to the previous screen, or the filter/list screen without changing any data.

- Click the **Close** button. This returns you to the previous screen.

You might find it easier to hide the browser navigation bar while you work in Ohio SACWIS. Press **F11** on your keyboard or try one of the following:

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Internet Explorer	Right-click on the tool bar, then left-click on Standard Buttons
Chrome	In the top-right corner of the window, click on the ellipsis (three-dot) icon, locate the Zoom section of the drop down menu, and select the square icon to the far right.
Firefox	Select ViewgToolbarsgNavigation Toolbar
	Repeat the action above to restore the navigation buttons.

Header and Footer

Regardless of where you are in Ohio SACWIS, certain buttons and links always appear at the top and bottom of the screen. These are the header and footer links and buttons. The header in SACWIS displays the logged in username, the environment, the agency, and a **Log Off** link. The header also displays buttons. Each button has links that navigate to specific areas within the button selected.

Header:

Ohio SACWIS

Supervisor, Sandy / Log off
Youth Navigator Network
UAT1 / 4.22.0 ⧉ / Last Login:

🏠 Home ▾   ⧗ Recent ▾   🔍 Search ▾   ❓ Help ▾

If you are entering information on a screen, and want the information saved to the record, be sure to click the save button before clicking on the options in the header, footer, or another primary tab, or navigation link.

The Home Screen

When you first login, you arrive at the **Home** tab, or **Home** screen. You can also return to this screen from any screen by clicking the **Home** tab or header button. The **Home** screen allows you to view and add broadcast messages; and navigate to task Alerts. Alerts are links to tasks taken on a work item assigned to you regardless of who performed the task.

The **Home** screen displays three secondary tabs:

Home	Intake	Case	Provider	Financial	Administration

Alerts   Approvals   Assignments

- **Alerts**. Displays both broadcast messages either added by the state or by your agency, and Alerts. Alerts are specific tasks taken on your work items either by you or another worker. The number of alerts display based on last login, 1 day, 7 days, and 14 days by selecting the heading for each.

- **Approvals**. Work processes that require approval will display at the end of each process that needs routed and/or supervisor approval. Once the process is

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completed and validated by the worker, if you are the person to whom it is routed, it will display as a link within this tab. Once you select the link, you review the details recorded. The **Process for Approval** button will allow the supervisor to route the record back to the worker and/or final approve the record.

- **Assignments**. Displays work assignments assigned to you. If you have supervisory duties, the assignments tab also displays a drop-down list to select from the workers assigned to you; and a show button to view the assignments for the worker selected. As a supervisor, the Assignments link allows you to select each team member to view their assignments; assign tasks, end assignments, and assign items by geographical designation.

  This section has been disabled but may be added in the future

- **Action Items**. Action Items take the place of the Tickler system. Action Items are system generated based on assignment. You can view Action Items from the Home screen, Action Items subheading, and from the case, or provider record's Overview screen for which the action item needs completed. Each Action Item displays a tag that identifies whether the action needing taken is within the time required to complete the action; close to being past due, or past due.

Primary Tabs

The other tabs in the main row reflect the five primary functional areas in Ohio SACWIS. The tabs you see depend on the parts of the Ohio SACWIS to which you have access.

Home	Intake	Case	Provider	Financial	Administration

- **Intake**. For recording and screening intakes. All cases in Ohio SACWIS are created from intakes.

- **Case**. For recording case activities, family specific work items, case services, and case plans. Case categories range from Assessment/Investigation, Ongoing, Young Adult Services, Bridges, Adoption, etc.

- **Provider**. For maintaining information about resource providers (foster/adopt/kinship homes, child residential centers, group homes, etc.) like names, addresses, staff members, home studies, certifications and service credentials.

- **Financial**. For managing fiscal activities, like service authorizations, rates and ceilings, provider rosters, payment processing and eligibility determinations.

- **Administration**. For maintaining staff information, requesting standard reports, and performing certain utilities. Contains system maintenance functions, like broadcast messages, tickler templates, lookup values, user groups and security profiles.

- Your job probably requires you to work mostly in only one of these areas. Simply click on a tab to enter the area(s) to which you are assigned.

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Secondary Tabs and Tertiary Navigation

When you click on one of the primary tabs, a secondary row of tabs appears just below the row of primary tabs. There can be several selections under the primary tab depending on your security profile. These open main areas of work within the functional area. On many secondary tabs, a tertiary menu of links appears in a blue box on the left side of the screen. This blue box is referred to often as 'left-hand navigation bar'. This menu allows you to work on specific records within the work area identified by the secondary tab. In the screen shot below, the **Primary Tab** of Administration is selected, the **Secondary Tab** of Staff is selected, and the **Tertiary menu** option of Delegate Assignment is selected.
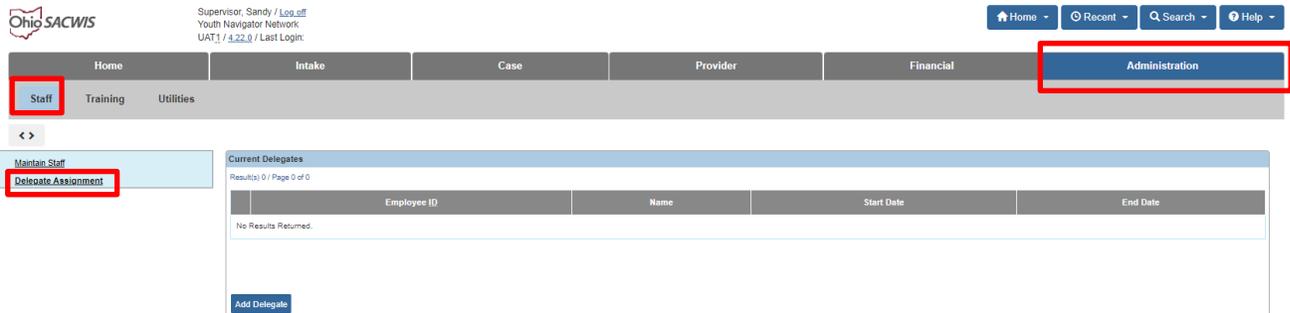
Opening Records

If you work in Case or Provider, you see a **Workload** tab. This tab lists the active records for cases and providers assigned to you. When you open a case or provider record from the Workload, you reach the **Case Overview** or **Provider Overview** screen, which is a summary screen for a given record. The tertiary menu on the left also appears on the overview screen. Each item in the left-hand navigation on an **Overview** screen displays links to additional work items that are associated with the case or provider record you selected.

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When you click a link in the navigation bar on the left, the system typically displays filter criteria and a list page. All records that have been created of the type you select appear on the screen, usually listed in a table format. Above the table you can enter search criteria and filter options to find the record being sought. You may see drop-down lists, and/or an **Add** button to create a new record. The **Edit** or **View** link will allow you to open an existing record. When you add or edit an item in the record or table, you open a detail screen, which displays the content of the record. Information is added to the Ohio SACWIS database from the detail screens.

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List Screens and Detail Screens

List Screens

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

Home	Intake	Case	Provider	Financial	Administration

Workload

‹ ›

Case Overview
▶ **Activity Log**
Intake List
Case Services
Legal Actions
Case Closure
Agency Case Transfer

CASE NAME / ID:
Fletcher, Ferb /   **Young Adult Services**
Open (09/23/2022)

Activity Log Filter Criteria

Activity From Date: [   ] 📅   Activity To Date: [   ] 📅

Case Category: [▾]

Contact Type: [▾]

Category: [▾]

Sub Category: [▾]

Activity State: [▾]

Agency: [▾]

➕ **Advanced Search Criteria**

Sort Results By: [▾]   ☐ Traverse Records Only

⦿ Current Episode ◯ View Historical

[Filter] [Clear Form]

Each row in this table represents a single record. The number of records may exceed what can be displayed on one screen. In this situation, the results at the top of the list table will display the number of records on the screen, and the total number of records. Next to this information, the system will tell you the page number you are on and of how many pages exist. At the bottom of the list table, you will see page numbers, with the page you are on highlighted.

In this example, we will review Activity Logs. The records will display links allowing you to take specific actions. A **View** link allows you to view the record in read only. An **Edit** link will display when you can edit, or add information to a record before it is final approved. A **Copy** link allows you to copy a record, and edit the contents to help reduce recording redundancy. A **Report** link runs a report on the single record. These links appear in the left-most column of each record.

In the last column to the right, you may see **Delete** or **Amend** links, depending on the record. You will also see icons that represent 📄report, 📋copy, and Ⓝ or 👁 to view the record's narrative.

To add a new record, click the **Add Activity** button. To run a report on the process in which you are working, a **Report** button may appear below the list of records (if available on that screen) that will generate a copy of all available records. By selecting the view, edit, copy or add link, the system displays a detail screen.

Detail Screens

A **Detail** screen allows you to view or add the details of a specific record. When you add a new record, the **Detail** screen does not contain any data. To complete the record, you enter details in the fields on the screen and click the **Save** or **Apply** button to save these details to the Ohio SACWIS database. The system ensures that you complete each record correctly. If you do not want to save changes, you click the **Cancel** button to navigate away from the screen. You click **Close** to close a read-only screen.

Remember, the system generally displays a list screen for filtering records before it displays a detail screen for entering data on a record.

Required and Narrative Fields

A field is the element of a detail screen that either displays information from the database or allows you to enter information into the database. You complete fields in the same way you do on any online form.

Required Fields

The system ensures that you enter the information it requires for accurately processing information.

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

- **Conditionally required fields**. The system may require that information be added to either one field or another. Alternatively, it may require that information be added to one field if another field is completed. In these situations, the field labels are not in bold type. However, the system displays an error message if a conditionally required field is left blank.

- **Fields required for approval**. Larger records must be fully complete before a supervisor or reviewer can approve them. For these, the system generally displays a **Validate for Approval** button, which allows you to instruct the system to check that all the required information has been entered. The system then displays a listing of any missing information.

Narrative Fields

Many screens in Ohio SACWIS include narrative fields, large text boxes in which you write free-form descriptions or explanations. The amount of text you can enter in these fields varies from screen to screen. Some **Narrative** fields display a number (usually below the field in a small box) that shows how many characters can still be typed into the field. For example, 4,000 characters (including spaces) is about 700 words and 200 characters is about 30 words.

Narrative fields appear with a button, which allows you to run the spell checking program on the text you entered.

Adding and Deleting Records

Adding

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 intake, case, or provider records with which they are associated. New providers are added on the **Provider** tab, either through the provider inquiry process (ODJFS providers), the Agency Certification process or from the provider directory (non-ODJFS providers).

> **Note**
> The system always requires you to conduct a search before you add a new person or provider record, to prevent the accidental duplication of records in the system. If you discover duplicate records, contact your supervisor.

Designated workers or the Automated Systems Help Desk staff can assist with merging duplicate records.

Deleting

If a record can be deleted, a **Delete** icon 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 until the final approval is saved. That is, the status of the record is "Draft," "In Progress," "Pending," depending on the type of record. An intake can never be deleted.

Often you are associating one record with another, in which instance you are deleting only the association. For example, you have associated the person profile of a case member with a case by "adding" the person to case. When you delete the case member, you are not deleting the person profile record, only the association between that person and the case.

Apply, Save, Cancel, Close

The detail screens in Ohio SACWIS allow you view or update information that's in the Ohio SACWIS database. You launch a detail screen by opening a record from a list screen or from another detail screen. Detail screens include command buttons that control how information is saved:

- 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 the confirmation message, to return to the originating screen without saving any changes.
- Click **Close** on a read-only screen to return to the originating screen.

🔖 Note
As you move through tabs on a screen, be sure to routinely click **Save** or **Apply** to ensure that your work is saved.

ID Numbers

Ohio SACWIS manages primary entities like intakes, cases, person profiles, and provider records according to an identification (ID) number. The system associates various records with each other by these ID numbers. For example, participants and case members are associated with intakes and cases by their Person IDs. And intakes and cases are associated with each other by their IDs.

The system assigns ID numbers as follows:

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- An Intake ID is assigned when you first click **Save** or **Apply** on the **Basic Information** screen. To save the record, you must enter at least the date and time received and the intake method. The system defaults to the current date, time, and phone for the intake method, but this can be changed by the worker.

- A Person ID is assigned when you first click **Save** or **Apply** on the **Person Information** or **Participant Details** screen. To save the record, you must enter at least the person's first and last names, click the **Unknown** check box for an intake participant, or click the **Create New Person** button.

- A new Person ID is assigned to an adopted child when a supervisor approves the request to secure the child's record.

- A Case ID is assigned when you first click **Save** on the **Create Case** screen, which appears when you link the new case to an intake record. To save the case, you must select at least one participant and identify a case reference person (CRP).

- A Provider ID is assigned to a non-ODJFS provider when you first click **Save** or **Apply** on the **Basic Provider Information** screen. To save the Provider Record, you must enter at least the provider's first and last names, the provider type, the provider's address, and contact information.

- An employee ID is assigned to an employee in SACWIS when a user selects **Create a New Employee** from the **Maintain Staff** screen, a Person ID is linked to the employee record, a hire date is entered, and the record is saved.

Person Overview

In Ohio SACWIS, the details about a person are managed outside of the intake, case, or provider record in which the person is included. After a person record is created, it can be linked to various types of work items or records, for example, on a case plan or a member of a provider record. If a person is involved with Ohio SACWIS at multiple times for different reasons, the system can track that person's roles without duplicating person information.

The person record is where you record additional details about a person such as:

Address, Contact Info., and Historical Details	Medical History	Education Details
Demographic Information	Employment History	Legal Status History
Background Information	Delinquency Information	Safety Hazard Details
Personal Characteristics	Financial Information	Military Information
		Relationships

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The **Person Overview** screen provides some key details about a person recorded in their Person Profile. The Person Profile is accessed through the Profile link listed in the navigation bar on the left of the person overview screen. The person overview screen is where you can select from the links in the navigation bar.

Viewing a Person's Address and Contact Information

Ohio SACWIS maintains a history of a person's addresses, foreign as well as domestic. When you add an address on a person profile, Ohio SACWIS saves the address to the database and links it to the person record. Once an address has been added to the Ohio SACWIS database, it remains there to be associated with any other person profiles. All person profiles must have a primary address recorded.

To view a person's address and address history, complete the following steps:

1. Conduct a Person Search and click the **View** link next to the person ID/name for which you are searching for. The **Person Overview** screen displays.

2. Click the **Profile** link that displays in the navigation bar on the left of the person overview screen., then click on the Profile hyperlink.

▶ Person Overview
Profile
Education
Medical
Employment
Military
Background
Delinquency

PERSON NAME / ID:
David, Dave / 123456
Male Age 25, DOB 01/01/1997
123 Fake Street, Columbus, OH 45309
(614) 222-3333
ENVIRONMENTAL HAZARDS:

RACE: *White*
HISPANIC / LATINO: *No*
HAIR COLOR:
EYE COLOR:

AKA Names

Prefix	First Name	Middle Name	Last Name	Suffix	AKA Type

Safety Hazards

Hazard Type	Begin Date	Narrative

3. Click the **Address** tab. A list of this person's addresses appears in the **Person Address** section. This person's email and telephone information appears in the **Person Phone/Email** section.

   Only active addresses for a person display on the Person Address screen. The system retains each address that was recorded on a person profile to build a history of the person's addresses.

4. To see any other addresses associated with this person profile, click the **View Address History** link, then click the **Close** button.

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Creating a Youth Navigator Intake

This article describes the steps for recording a Youth Navigator Intake. An Intake documents a request or referral for Youth Navigator Network services and is the first step to opening a Case in Ohio SACWIS.

Completing a Case Transfer from the Youth Navigator Network to a PCSA

This article describes steps for Youth Navigator Network users to transfer a Young Adult Services case to a Public Children Services Agency (PCSA). Best practice encourages both Youth Navigator Network and the receiving PCSA to communicate throughout the case transfer process. Youth Navigation Network should contact the PCSA regarding the case and confirm the Case Transfer Administrator the case will be routed to. Once this has been done, the Youth Navigator can begin the transfer process in SACWIS.

Managing Case Services

This article describes how Case Services information may be added. Case Services may be added to indicate where the youth has been referred by your agency, with links to the Agency ID and/or appointment times that may have been established.

Completing an Activity Log

This article describes how to enter an Activity Log in Ohio SACWIS. Activity Logs are used to record any contact made with an individual in reference to a particular case. Recording all phone calls, emails, texts, letters, etc. allows users to fully document work on a case.

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Additional Resources

- Ohio SACWIS Knowledge Base: www.jfskb.com/sacwis - Contains a repository of articles and videos on completing tasks in SACWIS.

- Ohio SACWIS Online Help: Ohio_SACWIS- Provides guidance on all areas of the SACWIS application.

- SACWIS General Navigation and Security (video)

- This article explains the process of using Person, Intake, Case, Provider and Employee Search functionalities in Ohio SACWIS. All search screens have been streamlined, placing the most used search criteria first: Using Search Functionality in SACWIS

- This article shows how to view, create, and edit relationships between persons in Ohio SACWIS: Relationships in SACWIS

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

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