

Ohio SACWIS Reference Guide – Ongoing Case Management



Knowledge Base Article

Ohio SACWIS Reference Guide – Ongoing Case Management

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Ohio SACWIS Reference Guide – Ongoing Case Management

Overview

This article provides a reference guide for navigating screens for Ongoing Case Management within the Ohio SACWIS system.

View a Case Record

1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.

Home Intake **Case** Provider Financial Administration

Workload Court Calendar Placement Requests

Case Workload

Caseworker: [] Sort By: Case Name Ascending [] Filter

Test, Supervisor (25 cases)

Sacwis, Susie [123456] - Open 11/21/2022 - Adoption

4. Click the **View Case Information** link.

Case Overview

Activity Log

Attorney Communication

Intake List

Safety Assessment

Substance Abuse Screening

Forms/Notices

Category/Pathway Switch

Safety Plan

Actuarial Risk Assessment

Family Assessment

Ongoing Case A/I

Specialized A/I Tool

Law Enforcement

Justification/Waiver

Case Services

CASE NAME / ID: **Ongoing** **HAZARD**
Sacwis, Susie / 123456 Open (06/17/2022)

ADDRESS: 123 Test Rd
Test, Oh 12345

CONTACT:

AGENCY: Test County Children Services Board

PRIMARY WORKER: Test Worker
SUPERVISOR(S): Test Supervisor

[View Case Information](#) | [2 Linked Cases](#) | [Program Categories](#) | [Case Status History](#)

5. Click the tabs along the top to see different information (members, relationships, etc.)

Case Detail Members Relationships Associated Persons

Case Address: 123 Test Rd
Test, Oh 12345

Agency: Test County Children Services Board

Geo Code:

Assignment Information

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Record a Case Profile

1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.
4. Click the **View Case Information** link.
5. On the **Case Detail** tab, select a choice from the **Primary Caretaker** field drop-down list.
6. If needed, select a name in the **Secondary Caretaker** field drop-down list.
7. Click the **Add Case Reference** button to record a case reference number.
8. Click the **Save** button.
9. **Repeat the previous two steps** for each **Case Reference ID** number that you want to add.
10. Click the **Apply** button.
11. On the **Members** tab, add members, edit members view member history, and copy an address, as needed.
12. On the **Relationship** tab, add and edit member relationships as need.
13. On the **Associated Persons** tab, add or edit associated persons as needed.

Case Detail	Members	Relationships	Associated Persons
-------------	---------	---------------	--------------------

Case Address: 123 Test Rd
Test, Oh 12345

Agency: Test County Children Services Board

Geo Code:

Assignment Information

[View Case Status History](#) | [View Assignment History](#)

Worker Name	Role	Agency of Worker
Test Worker	Screening Decision Maker	Test County Children Services Board
Test Worker	Worker	Test County Children Services Board

Primary Caretaker:

Secondary Caretaker:

Reference List

	Reference Type	Reference Number	Description	
edit	FACSIS Family ID	00		delete
edit	Legacy Case ID	02		delete

Add Case Reference

Apply **Save** **Cancel**

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View a Case Activity Log

1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.
4. Click the **Activity Log** link in the **Navigation** menu on the left.

Home Intake **Case** Provider Financial Administration

Workload Court Calendar Placement Requests

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Case Overview
Activity Log
Attorney Communication
Intake List
Safety Assessment
Substance Abuse Screening
Forms/Notices
Category/Pathway Switch
Safety Plan
Actuarial Risk Assessment
Family Assessment
Ongoing Case All

CASE NAME / ID: **Ongoing** **HAZARD**
Sacwis, Susie / 123456 Open (04/09/2021)

ADDRESS: 123 Test Rd
Test, Oh 12345

CONTACT:

AGENCY: Test County Children Services Board

PRIMARY WORKER: Test Worker
SUPERVISOR(S): Test Worker

[Assign Worker](#)

5. Select the filter criteria.
6. Click the **Filter** button.
7. Click the **Edit, Copy or Report** link on the activity you want.

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

Activity Log

Result(s) 1 to 15 of 510 / Page 1 of 34

Add Activity

	Activity Date	Contact Type	Category	Sub Category	Created By	Activity State	Narrative
edit copy report	10/12/2023	General	General	Other		Completed	amend

Associated Participants:

8. Click the **Close** button to return to the previous screen.

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Record Case Activities

1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.
4. Click the **Activity Log** link in the **Navigation** menu on the left. Click the **Add Activity** button.

The screenshot shows the 'Activity Log' section of the system. At the top, there is a blue header with the text 'Activity Log'. Below the header, it says 'Result(s) 1 to 15 of 510 / Page 1 of 34'. A red box highlights the 'Add Activity' button. Below the button is a table with the following columns: Activity Date, Contact Type, Category, Sub Category, Created By, Activity State, and Narrative. The first row of data shows: 10/12/2023, General, General, Other, and Completed. There are also links for 'edit', 'copy', 'report', and 'amend'.

	Activity Date	Contact Type	Category	Sub Category	Created By	Activity State	Narrative
edit	10/12/2023	General	General	Other		Completed	amend

5. Complete all fields, as needed.
6. Click the **Associate Participants** button.
7. Click the **Contact Status** for each next to participant you want.
8. Click the **Save** button.

The screenshot shows the 'Case Associated Persons' section. It features a table with columns for 'Case Associated Persons' and 'Contact Status'. The first row contains 'Test, Person - 07/21/1999' and a radio button selection for 'None', 'Attempted', and 'Completed'. A red box highlights the 'Contact Status' dropdown menu. Below the table, there is a form for 'Activity State' with a dropdown menu set to 'Draft'. At the bottom, there are four buttons: 'Apply', 'Save', 'Cancel', and 'Delete'. A red box highlights the 'Save' button.

Amend Case Activities

1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.
4. Click the **Activity Log** link in the **Navigation** menu on the left. Click the **Amend** link next to the Activity Long that you are amending.

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Activity Log

Result(s) 1 to 15 of 510 / Page 1 of 34

Add Activity

	Activity Date	Contact Type	Category	Sub Category	Created By	Activity State	Narrative
edit	10/12/2023	General	General	Other		Completed	amend
copy							
report							

Associated Participants:

5. Click the **Insert Correction** link.
6. Enter the **New Correction** information.

Narrative History

Type	Date/Time Created	Created By	Agency
Original	10/12/2023 12:20 PM		Test County Children Services Board

Insert Correction **View Narrative**

Activity State: *

Close

7. Click the **Save** button.

Correction Details

New Correction: *
(expand full screen)

Spell Check **Clear** 10000

Existing Narrative:
(expand full screen)

The Life Skills CW closed

Save **Apply** **Cancel**

8. Click the **Close** button.

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View Case Conference Notes

1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.
4. Click **Case Conference Notes** link in the **Navigation** menu on the left.
5. Click the **View Narrative** link.
6. Click the **Close** button.

The screenshot shows the Ohio SACWIS Case Conference Notes interface. At the top, there are tabs for Home, Intake, Case (highlighted), Provider, Financial, and Administration. Below these are sub-tabs for Workload (highlighted), Court Calendar, and Placement Requests. A navigation menu on the left lists various case management tools, with 'Case Conference Note' highlighted. The main content area shows case information for 'Sacwis, Susie / 123456' with a 'HAZARD' status. Below this is a 'Case Conference Note Filter Criteria' section with fields for 'From Date', 'To Date', 'Created By', and 'Category', and a 'Sort Results By' dropdown set to 'Conference Date (Descending)'. A 'Filter' button is present. The 'Case Conference Note' section shows 'Result(s) 1 to 6 of 6 / Page 1 of 1' and a table with the following data:

	Category	Created By	Conference Date	Worker	Status
view	Staffing	Test Worker	05/03/2021	Test Worker	Completed

At the bottom of the table, there are 'Add Note' and 'Generate Report' buttons.

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Record a Case Plan

1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.
4. Click **Case Plan** link in the **Navigation** menu on the left.

The screenshot displays the Ohio SACWIS Case Management interface. At the top, there is a navigation bar with tabs for Home, Intake, Case, Provider, Financial, and Administration. Below this, a secondary bar contains Workload, Court Calendar, and Placement Requests. The Case tab is selected. On the left, a navigation menu lists various case management functions, with Case Plan Tools highlighted. The main content area shows case details for 'Ongoing' case 'Sacwis, Susie / 123456' with a 'HAZARD' status. Below the case details is a 'Case Conference Note Filter Criteria' section with fields for From Date, To Date, Created By, Category, and Sort Results By. A 'Filter' button is present. Below the filter is a 'Case Conference Note' section.

5. Click the **Edit** link to update a plan in progress.
6. Click the **Add Family Case Plan** button to create a new plan.

The screenshot displays the Ohio SACWIS Case Management interface showing the Plan Filter Criteria and Plans sections. The Plan Filter Criteria section has a dropdown menu for Agency. Below it is a Filter button. The Plans section has a button for Add Family Case Plan. Below the button, it shows Result(s) 1 to 2 of 2 / Page 1 of 1. Below that is a table with columns for Plan Name, Plan Number, Plan Type, Effective Date, and Agency.

Plan Name	Plan Number	Plan Type	Effective Date	Agency
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7. Select the type in **Case Plan Type** field.
8. Click **Add Child** or **Add Adult** button, as needed.

Child(ren) Participating in the Family Case Plan

Male Age 14, DOB 12/30/2008 

Protected under ICWA: ⓘ ⓘ
No

Child Location:
Children's Residential Facility

Agency Legal Status:
Temporary Court Order

Court Case Number:

Court ID Number: ⓘ

Child's Permanency Goal: ⓘ

Add Child to Family Case Plan Relationships

9. Click the **Save** button. The **Case Plan Topics** screen appears.


Previous Topic Next Topic Apply **Save** Cancel

10. Click each link in the **Topics** column and complete the fields.

Family Case Plan Topics <

- Parties to the Plan (PP) ⓘ Not Completed
- Strengths And Needs (SN) ⓘ Not Completed
- Concerns (C) ⓘ Not Completed
- Placement Information (PI) ✓ Completed
- QRTP (Q) ✓ Compliant
- Visitation (V) ⓘ Not Completed
- Foster Youth Rights Handbook (FH) ✓ Completed
- Independent Living Information (IL) ✓ Completed
- Court and Signatures (CS)
- Approval (A)

Child(ren) Participating in the Family Case Plan

Male Age 14, DOB 12/30/2008 

Protected under ICWA: ⓘ ⓘ
No

Child Location:
Children's Residential Facility

Agency Legal Status:
Temporary Court Order


Court Case Number:

Court ID Number: ⓘ

Child's Permanency Goal: ⓘ

Add Child to Family Case Plan Relationships

Adult(s) Participating in the Family Case Plan

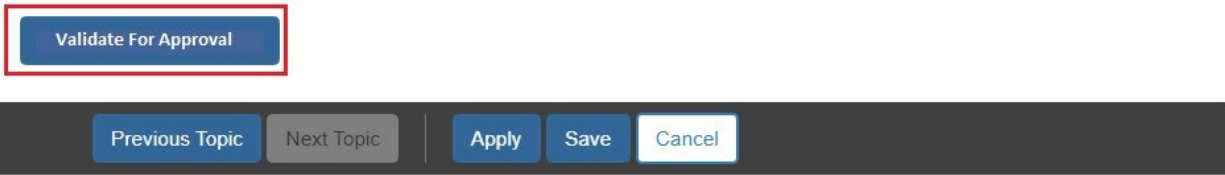
Female Age 38, DOB 07/23/1985 

Contact Information:

Add Adult to Family Case Plan

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11. When complete, click the **Validate for Approval** button.



12. Click the **Process for Approval** button.

View Service Information

1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.
4. Click **Case Services** link in the **Navigation** menu on the left.

Case Overview

- Activity Log
- Attorney Communication
- Intake List
- Safety Assessment
- Substance Abuse Screening
- Forms/Notices
- Category/Pathway Switch
- Safety Plan
- Actuarial Risk Assessment
- Family Assessment
- Ongoing Case A/I
- Specialized A/I Tool
- Law Enforcement
- Justification/Waiver
- Case Services**

CASE NAME / ID: *Ongoing* **HAZARD**
 Sacwis, Susie / 123456 *Open (06/17/2022)*

ADDRESS: 123 Test Rd, Test, Oh 12345 CONTACT:

AGENCY: Test County Children Services Board

PRIMARY WORKER: Test Worker SUPERVISOR(S): Test Supervisor

[Assign Worker](#)

Case Actions

[View Case Information](#) | [2 Linked Cases](#) | [Program Categories](#) | [Case Status History](#)

5. Click the **View** link.

Case Services

Service: **Add Case Services**

Result(s) 1 to 10 of 10 / Page 1 of 1

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
view	Sacwis, Susie	Case Management/Case Management Services	Case Member	06/14/2023 -	delete service end Linked

[referrals](#)

[Case Member / Caregiver / Caretaker History](#)

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6. Click the **Service Review** tab.

Service Information | **Service Review** | Service Activity

CASE NAME / ID: Sacwis, Susie / 123456 Ongoing / Open (04/09/2021)

Service Information

Agency: Test County Children Services Board
Risk Contributors: Emotional Functioning, Physical/Cognitive/Social Development, Self Protection

Effective Date: * 06/14/2023 Estimated Service End Date:
Service Category: * Case Management Service Type: * Case Management Services

Member Service Status History

Current Status All Statuses

Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
-------------	--------	----------	---------------------	------------------	----------------------------	------------------

7. Click the **View** link next to the Service Review.

Service Information | **Service Review** | Service Activity

CASE NAME / ID: Sacwis, Susie / 123456 Ongoing / Open (04/09/2021)

Service Category: Case Management Service Type: Case Management Services

Service Review [Expand All](#)

	Case Member(s) / DOB	Review Date	
edit	Sacwis, Susie - 12/30/2008	11/27/2023	delete
view			

Service Review Details

Add Service Review

Apply **Save** **Cancel**

8. Click the **Close** button.

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Record a Removal

1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.
4. Click the **Initial Removal** link in the **Navigation** menu on the left.

Home Intake **Case** Provider Financial Administration

Workload Court Calendar Placement Requests

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Case Overview
Activity Log
Attorney Communication
Intake List
Forms/Notices
Substance Abuse Screening
Ongoing Case A/I
Specialized A/I Tool
Law Enforcement
Justification/Waiver
Case Services
Legal Actions
Legal Custody/Status
Living Arrangement/
Guardianship
Initial Removal
Potential Adoptive Families

CASE NAME / ID: **Adoption**
Sacwis, Susie / 123456 *Open (04/01/2023)*

ADDRESS: 123 Test Rd
Test, Oh 12345 CONTACT:
AGENCY: *Test County Children Services Board*
PRIMARY WORKER: Test Worker SUPERVISOR(S): Test Supervisor
[Assign Worker](#)




Case Actions

[View Member Details](#) | [Access Original Case](#) | [Program Categories](#) | [Case Status History](#) | [View Adoption Subsidies](#)

Action Items Case Alerts Dashboard Assignments / Eligibility

5. Click **Edit** link if record is already in **Draft** status.
6. In the **Child's Name** field, select the child's name.
7. Click **Add Removal Record** to create new record.

Initial Removal Records

	Child Name	Removal Date	Discharge Date	Status	
edit	Sacwis, Susie / 123456	06/23/2022		Draft	 
view	Sacwis, Susie / 123456	11/02/2020	12/15/2020	Completed	

Child Name:

[Add Removal Record](#)

8. Complete **all fields** on the screen (except discharge date and discharge reason).
9. Click the **Apply** button.

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Removal Information **Removal Circumstances**

Removal Information Details

Initial Removal Legal Status: Telephonic Order of Custody ICWA Information: No information recorded

Removal Date: Custody Start Date:

Removed prior to Agency Custody AWOL at Agency Custody

Selecting the checkbox applies to those youth removed via a pickup order, warrant, or arrest and placed in a detention facility.

Address at Removal:
An Address has not been selected

Circumstances:

Status:

10. Click **Removal Circumstance** tab.
11. Complete each **narrative** field.
12. Click the **Save** button.

Record Placement Request

1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.
4. Click the **Placement Request** link in the **Navigation** menu on the left.

Home	Intake	Case	Provider	Financial	Administration
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Workload Court Calendar Placement Requests

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▶ **Case Overview**

[Activity Log](#)

[Attorney Communication](#)

[Intake List](#)

[Safety Assessment](#)

[Substance Abuse Screening](#)

[Forms/Notices](#)

[Category/Pathway Switch](#)

[Safety Plan](#)

[Actuarial Risk Assessment](#)

[Family Assessment](#)

[Ongoing Case All](#)

[Specialized AI Tool](#)

[Law Enforcement](#)

[Justification/Waiver](#)

[Case Services](#)

[Legal Actions](#)

[Legal Custody/Status](#)

[Living Arrangement / Guardianship](#)

[Initial Removal](#)

[Placement Request](#)

CASE NAME / ID: **Sacwis, Susie / 123456** **Ongoing** **HAZARD**
Open (04/09/2021)

ADDRESS: 123 Test Rd CONTACT:
 Test, Oh 12345

AGENCY: **Test County Children Services Board**

PRIMARY WORKER: **Test Worker** SUPERVISOR(S): **Test Supervisor**
[Assign Worker](#)

Case Actions

[View Case Information](#) | [0 Linked Cases](#) | [Program Categories](#) | [Case Status History](#)

One or more active case member(s) is missing demographic information: race, ethnicity, gender, DOB

Case members have unspecified relationships.

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5. In the **Child Name** field, select the name of child who you are adding the placement request for.
6. Click the **Add Placement Request** button.

Placement Requests Filter Criteria

Child Name: <input style="width: 80%;" type="text"/>	Status: <input style="width: 80%;" type="text"/>
From Request Date: <input style="width: 80%;" type="text"/>	To Request Date: <input style="width: 80%;" type="text"/>
Sort Results By: <input style="width: 80%;" type="text" value="Child Name (Ascending)"/>	

Filter Clear Form

Placement Requests

Result(s) 0 / Page 0 of 0

Add Placement Request

7. Complete the **required** fields.
8. Click the **Link Provider** button.
9. Click the **Search** button.
10. Select all providers that match.
11. Enter additional comments in the narrative field, if needed.
12. Click the **Save** button.

Placement Request Details

Agency:	Test County Children Services Board	Request Date:	11/27/2023
Child Name:		DOB:	12/30/2008

Responsible Caseworker:* <input style="width: 80%;" type="text"/>	
Responsible Placement Worker: <input style="width: 80%;" type="text"/>	Employee Search
Placement With Siblings Preferred:* <input style="width: 80%;" type="text"/>	
Placement Needed Date: <input style="width: 80%;" type="text"/>	Estimated End Date: <input style="width: 80%;" type="text"/>
Service Type: <input style="width: 80%;" type="text"/>	Status: * <input style="width: 80%;" type="text" value="Pending"/>

Potential Matches

Provider Name(s)	Service Description	Match Status	Rejection Reason	Rejection Date
Link Provider				

Additional Comments:

Spell Check
Clear
2000

Placement Details

Note: To complete placement of the child with the Accepted Provider, click Record Placement. If you have completed Placement Request Work and you do not wish to record a placement from the request record please select the appropriate status for the record. Caseworkers can also choose to record a placement record for the child by accessing the Placement List page for the Child's case record.

Record Placement

Save Cancel

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