

Adding Information to a Screened-In Intake



Knowledge Base Article

Adding Information to a Screened-In Intake

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Adding Information to a Screened-In Intake

Overview

For an intake that has been screened-in and linked to a case, Ohio SACWIS provides the ability to add the following information:

- **ACVs** – CA/N (Traditional) and FINS (Stranger Danger) Intakes
- **APs** – CA/N (Traditional) and FINS (Stranger Danger) Intakes
- **CSRs** – CA/N (AR) and Dependency Intakes
- **ASRs** – CA/N (AR) and Dependency Intakes (ASR Role is optional for Dependency Intakes)
- **Allegations** – CA/N (Traditional and AR) Intakes

However, the information must be added within **four business days** from the date and time of a screening decision **OR** before the Safety Assessment for the specified intake has been approved and routed for approval, **whichever occurs first**.

Additional intake participants with roles other than ACV / CSR and AP / ASR can be added until the 45th day after the screening decision date **OR** until the associated CAPMIS tool (family, on-going, or specialized assessment) has been approved or routed for approval, **whichever occurs first**.

Roles other than ACV / CSR and AP / ASR can also be added to existing intake participants, and Additional Reporter and/or Reporter Contacts may be entered until the 45th day after the screening decision date **OR** until the associated CAPMIS tool (family, on-going, or specialized assessment) has been approved or routed for approval, **whichever occurs first**.

Important:

- You can add information to an intake that has been linked to a case as long as you have a current assignment to the case.
- Any changes made to an intake are noted with a green caret [^].
- Any decisions made to the intake will require that you enter content into the **Post Decisions Narrative (Amendment)** field which is discussed in this document.
- When recording additional information on a new or existing intake, each county must follow the applicable **Ohio Administrative Code Rules**, as well as their own **internal agency procedures**.

Adding Information to a Screened-In Intake

Chart showing when information can be added to an Intake after the Screening Decision

This chart shows how and when information **can be added** to an intake after the screening decision is made.

Note: An acronym list is provided at that end of this Knowledge Base Article.

| | Within Four Business Days of Screening Decision OR Before the SA is Waived, Approved, or Routed for Approval | Before the CAPMIS Tool (family, on-going, or specialized assessment) is Waived, Approved, or Routed for Approval | After 45 Days |
|--|--|--|----------------------|
| CA/N (Traditional) | <ul style="list-style-type: none"> ➤ Can add allegations ➤ Can add roles of ACV / AP to existing intake participants ➤ Can add intake participants with any role except CSR / ASR | <ul style="list-style-type: none"> ➤ Can add roles except for ACV / AP and CSR / ASR ➤ Can add to intake participants with roles except for ACV / AP and CSR / ASR | View Only |
| CA/N (AR) | <ul style="list-style-type: none"> ➤ Can add allegations (within AR rules) ➤ Can add roles of CSR / ASR to existing intake participants ➤ Can add intake participants with any role except ACV / AP | Same as above | View Only |
| FINS (Stranger Danger) | <ul style="list-style-type: none"> ➤ Can add all roles to existing intake participants except CSR / ASR ➤ Can add intake participants with any role except CSR / ASR | Same as above | View Only |
| Dependency | <ul style="list-style-type: none"> ➤ Can add all roles except ACV / AP to existing intake participants ➤ Can add intake participants with any role except ACV / AP | Same as above | View Only |
| FINS (All Types Other than Stranger Danger) | <ul style="list-style-type: none"> ➤ Can add all roles to existing intake participants except ACV / CSR and AP / ASR ➤ Can add intake participants with any role except ACV / CSR and AP / ASR | Same as above | View Only |

Adding Information to a Screened-In Intake

Adding Information to an Intake that has been Screened-In and Linked to a Case:

1. From the Ohio **SACWIS Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Select the appropriate **Case ID** link.
4. On the **Case Overview** screen, click the **Intake List** link in the **Navigation** menu on the left.

Note: If you know the **Case ID** number, you can also use the **Search** link at the top of the **Home** screen and navigate to the **Case Overview** screen.

The screenshot displays the Ohio SACWIS Case Overview interface. At the top, there are navigation tabs: Home, Intake, Case (circled in red), Provider, Financial, and Administration. Below these are sub-tabs: Workload (circled in red), Court Calendar, and Placement Requests. A navigation menu on the left lists various options, with 'Intake List' circled in red. The main content area shows the 'Current Case Episode Intake List' for a case named 'Assess/Invest'. The table below contains one row of intake data.

| Intake ID | Status | Decision Date - Time | Category | Type | Initiation Date/Time | Case Disposition Date | Investigation/Assessment Completion Date | Agency Name | |
|-------------------------|-------------|----------------------|-------------|------------------------|----------------------|-----------------------|--|---------------------------|------------------------|
| reports | Screened In | 10/20/2022 10:00 AM | CA/N Report | Physical Abuse Neglect | | | | Ohio Child Welfare Agency | unlink |

Below the table are buttons for 'Record Disposition(s)' and 'Change Disposition(s)'. At the bottom, there is a link for 'Historical Case Episode(s) Intake List'.

The **Current Case Episode Intake List** screen appears.

Adding Information to a Screened-In Intake

- Click the **Intake** number you want to edit.

123456

CASE NAME / ID: Assess/Invest

Current Case Episode Intake List

| Intake ID | Status | Decision Date - Time | Category | Type | Initiation Date/Time | Case Disposition Disposition Date | Investigation/Assessment Completion Date | Agency Name | |
|-------------------------|-------------|----------------------|-------------|------------------------|----------------------|-----------------------------------|--|---------------------------|------------------------|
| 1234567 | Screened In | 10/20/2022 10:00 AM | CA/N Report | Physical Abuse Neglect | | | | Ohio Child Welfare Agency | unlink |

-
-
-
-
-
-

Intake Types

- Under the **Basics** tab in the **Intake Types** field, select the intake type that you want to add.
- Click the **Add** or **Add All** button to move your selection(s) to the **Selected Types** column. Multiple Intake Types can be selected as seen in Red below.

Adding Information to a Screened-In Intake

Reporter **Basic** Participants ACV/AP Detail Allegations Substance Use

Decision

Intake Type

Intake Workload Name: Simpson

Intake Category: CA/N Report

Intake Types:

| | | |
|----------------------------|---------|-----|
| Q | Add All | Add |
| Baby Doe/Disabled Infant | | |
| Medical Neglect | | |
| Physical Abuse Shaken Baby | | |
| Sexual Abuse | | |

Selected Types:

| | | |
|------------------------|------------|---|
| Remove | Remove All | Q |
| Emotional Maltreatment | | |
| Neglect | | |
| Physical Abuse | | |

Note: The field shown in green is where the original **Intake Narrative** content is located. **Additional Comments** will no longer be visible, as those are only available while the intake is pending and doesn't display after intake is linked to case. (It's like a temporary "sticky note" for internal communication about the intake.)

Click the **Post-Decision Amendment** button to open a new field to add the narrative.

Scripts & Templates

Intake Narrative: * (last saved Oct 23, 2022 11:10:47 AM) (Expand view)

The father is always drinking and gets drunk. He gets angry and abusive towards Bart and was seen strangling him.

Post-Decision Amendment

Decision Comments:

Reporter Basic Participants ACV/AP Detail Allegations Substance Use Decision

Intake Type

Intake Workload Name: Simpson

Intake Category: CA/N Report

Intake Types:

| | | |
|----------------------------|---------|-----|
| Q | Add All | Add |
| Baby Doe/Disabled Infant | | |
| Medical Neglect | | |
| Physical Abuse Shaken Baby | | |
| Sexual Abuse | | |

Selected Types:

| | | |
|------------------------|------------|---|
| Remove | Remove All | Q |
| Emotional Maltreatment | | |
| Neglect | | |
| Physical Abuse | | |

Other Intake Designations

Does this report allege human trafficking of a child or children? Not Answered No Yes

Does this report allege a child fatality or near fatality? Not Answered No Yes

Does this report require a Specialized Assessment/Investigation? No

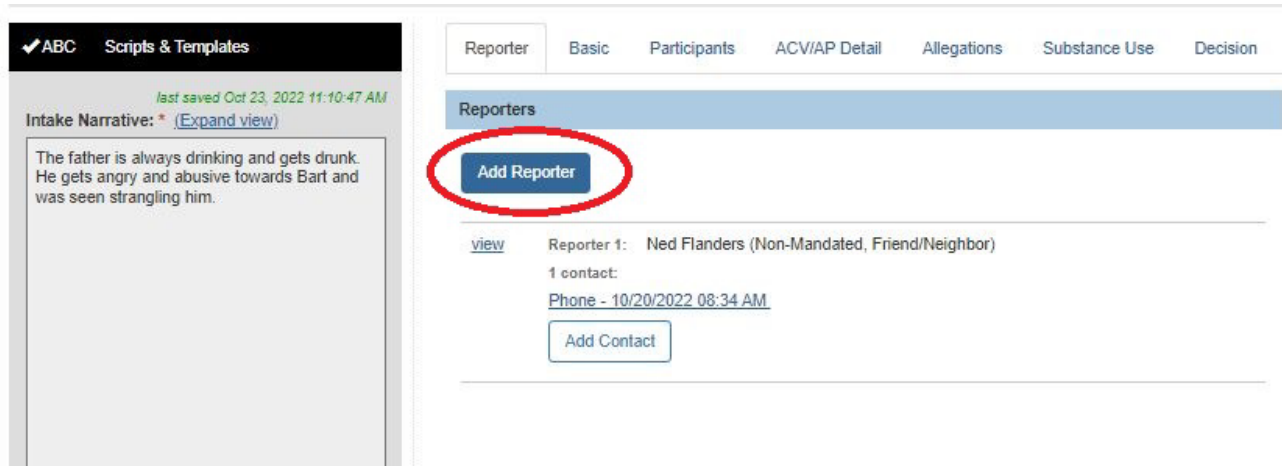
Does this report require Third Party Involvement due to a potential conflict of interest? No

Adding Information to a Screened-In Intake

Reporter Tab

When adding additional information to an intake, **the information must be attributed to the reporter of that information.** This additional information may be reported from a new hot-line call to your agency, or it could be information the case worker gathered during investigative interviews or home visits.

For steps on how to enter the information, refer to the **Recording Reporter, Multiple Intake Reporters, and Adding Call Records** Knowledge Base Article.



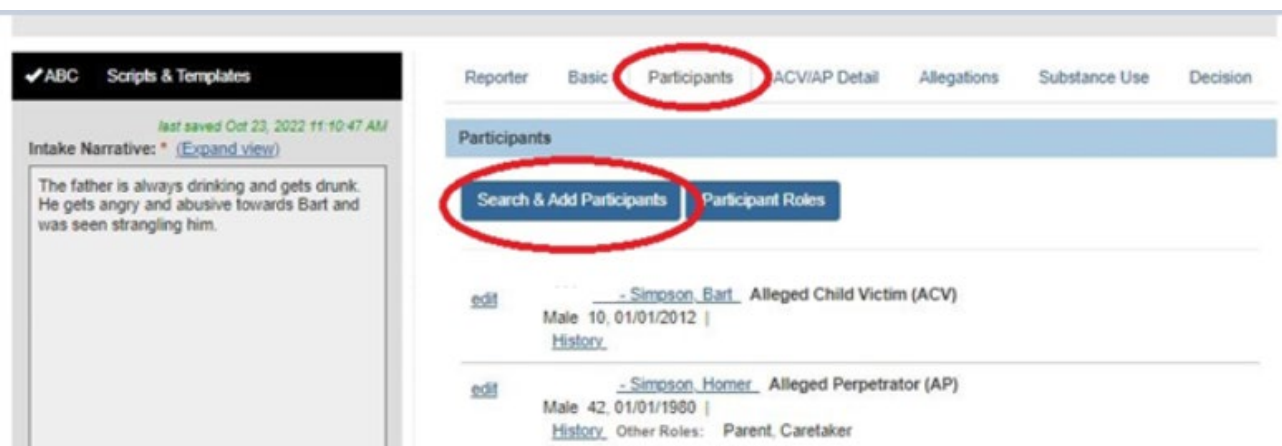
The screenshot shows a software interface with a left sidebar and a main content area. The sidebar has a header 'ABC Scripts & Templates' and a section 'Intake Narrative: * (Expand view)' containing the text: 'The father is always drinking and gets drunk. He gets angry and abusive towards Bart and was seen strangling him.' The main content area has a top navigation bar with tabs: 'Reporter', 'Basic', 'Participants', 'ACV/AP Detail', 'Allegations', 'Substance Use', and 'Decision'. The 'Reporter' tab is selected. Below the navigation bar, there is a section titled 'Reporters' with a blue header. A red circle highlights a blue button labeled 'Add Reporter'. Below this, there is a 'view' link and text: 'Reporter 1: Ned Flanders (Non-Mandated, Friend/Neighbor)', '1 contact:', and 'Phone - 10/20/2022 08:34 AM'. A blue button labeled 'Add Contact' is also visible.

Participants Tab

1. To add an intake participant, click the **Participants** tab.

Important: If you're just adding a role to an existing intake participant, skip to the **Adding Participant Roles** sub-section below.

2. Click the **Search and Add Participants** button.

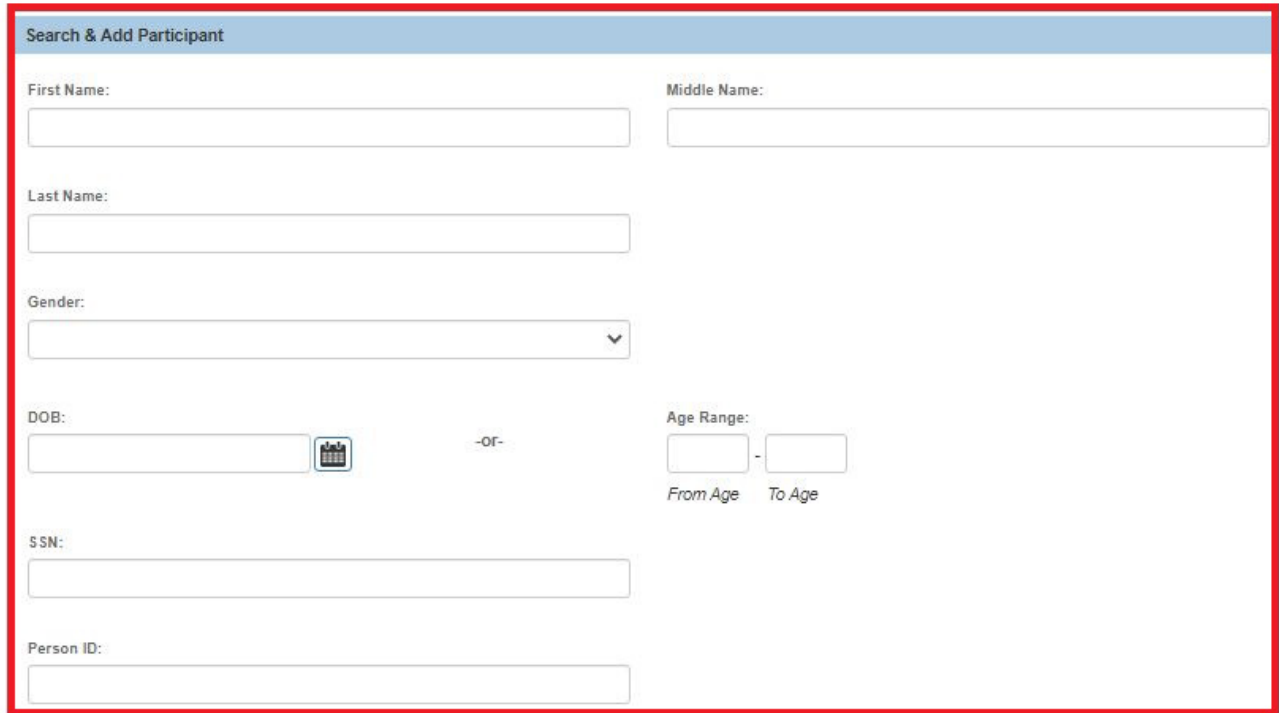


The screenshot shows the same software interface as the previous one, but with the 'Participants' tab selected in the top navigation bar. A red circle highlights the 'Participants' tab. Below the navigation bar, there is a section titled 'Participants' with a blue header. A red circle highlights a blue button labeled 'Search & Add Participants'. To its right is a blue button labeled 'Participant Roles'. Below these buttons, there is a list of participants. The first entry is: 'edit - Simonson, Bart, Alleged Child Victim (ACV)', 'Male 10, 01/01/2012 |', and 'History'. The second entry is: 'edit - Simonson, Homer, Alleged Perpetrator (AP)', 'Male 42, 01/01/1980 |', and 'History, Other Roles: Parent, Caretaker'.


Adding Information to a Screened-In Intake

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

- Using the search criteria fields, enter information to locate the person.
- Click the **Search** button at bottom of screen.

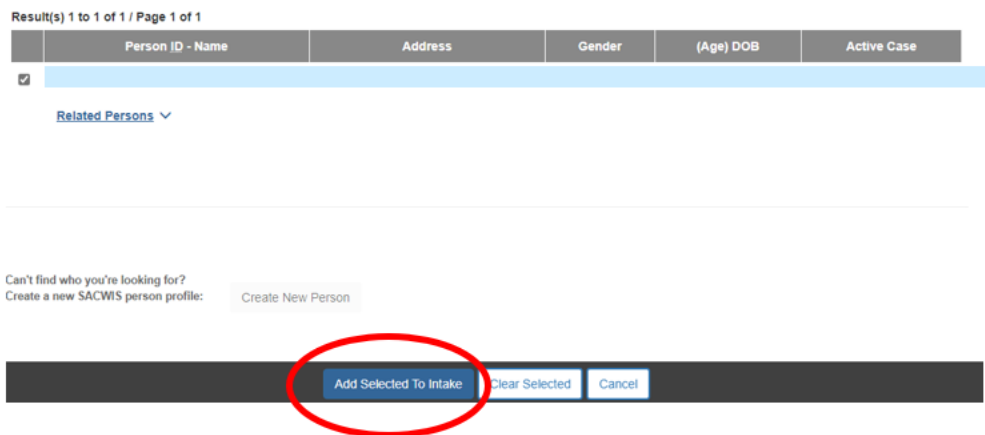


The screenshot shows the 'Search & Add Participant' form with the following fields:

- First Name:
- Middle Name:
- Last Name:
- Gender:
- DOB:  -or- Age Range: -
From Age To Age
- SSN:
- Person ID:

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

- Click the check box next to the selected person's name.
- Click the **Add Selected To Intake** button.



The screenshot shows the 'Person Search Results' section with the following elements:

- Result(s) 1 to 1 of 1 / Page 1 of 1
- Table with columns: Person ID - Name, Address, Gender, (Age) DOB, Active Case
- Table row: [Related Persons](#) v
- Can't find who you're looking for? Create a new SACWIS person profile:
- Buttons:

Adding Information to a Screened-In Intake

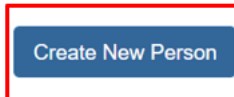
The selected result appears on the **Participants** screen. The new intake participant is notated with a green caret [^].

Important:

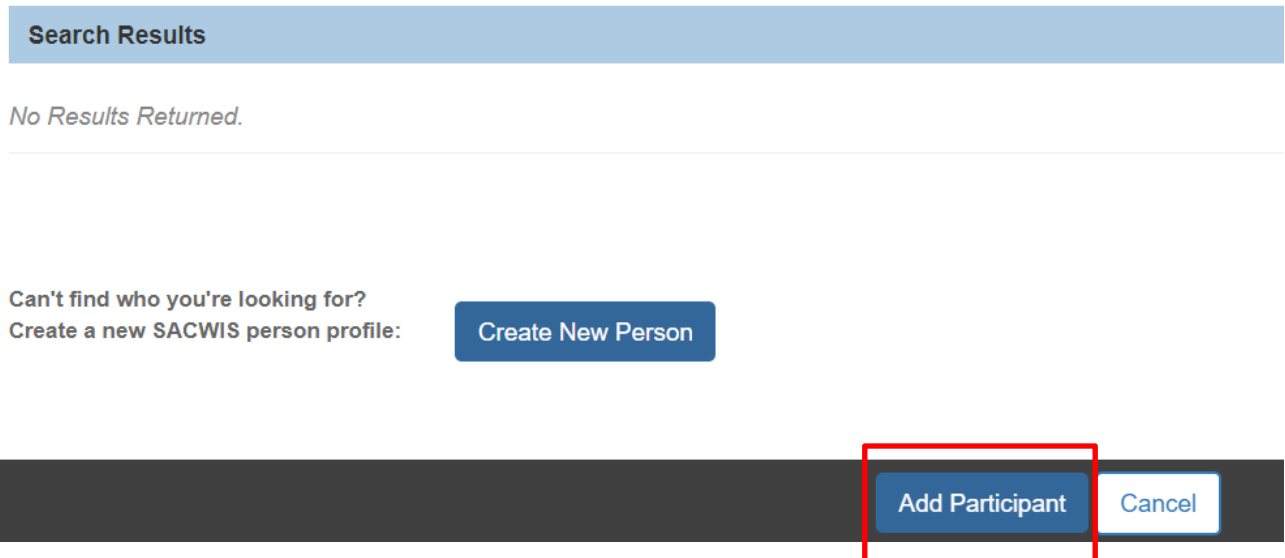
- If the participant is not found during the Person Search, they can be added to Ohio SACWIS by clicking the **Create New Person** button.



Can't find who you're looking for?
Create a new SACWIS person profile:



- If the person is unknown, the participant can be added by clicking the **Add Participant** button at the bottom of the screen.



The system will automatically add in the individual as Unknown – intake xxxxxx, as shown below

Adding Information to a Screened-In Intake

Participant Details

Current Narrative

Current Narrative (saved 12/07/2022 04:24 pm) ▾

Participant Details Substance Use Information

Participant Details

Participant is unknown or partially known

First Name: Unknown - intake 1234567 Middle Name: abe Last Name: Unknown - intake 1234567 Suffix: ▾

DOB: Estimated DOB -OR- Age Range: DOD: Deceased Date

Adding Participant Relationships

If a new intake participant was added, you will need to complete the **Participants Relationships** section to save the record. To do so:

1. Click the **Edit** link to the left of the new intake participant's name.

Participants Relationships

| | | |
|----------------------|---|-------------------------------|
| edit | Simpson, Bart / | Male Age 10, DOB 01/01/2012 |
| | 1 unspecified relationship ▾ | |
| edit | Simpson, Homer / | Male Age 42, DOB 01/01/1980 |
| | 1 unspecified relationship ▾ | |
| edit | Simpson, Lisa / | Female Age 8, DOB 01/01/2014 |
| | 1 unspecified relationship ▾ | |
| edit | Simpson, Marge / | Female Age 37, DOB 01/01/1985 |
| | 1 unspecified relationship ▾ | |
| edit | Simpson, Maggie / | Female Age 2, DOB 01/01/2020 |
| | 4 unspecified relationships ▾ | |

The **Relationships** screen appears.

2. In the **Relationship** field select the appropriate relationship from the drop-down list.
3. Click the **Save** button.

Adding Information to a Screened-In Intake

The screenshot shows the 'Relationship Editor' interface. At the top, five participant cards are displayed: Simpson, Bart (Male Age 10, DOB 01/01/2012, 1 unspecified relationship), Simpson, Homer (Male Age 42, DOB 01/01/1980, 1 unspecified relationship), Simpson, Lisa (Female Age 8, DOB 01/01/2014, 1 unspecified relationship), Simpson, Marge (Female Age 37, DOB 01/01/1985, 1 unspecified relationship), and Simpson, Maggie (Female Age 2, DOB 01/01/2020, 4 unspecified relationships). Below the cards, relationships are listed. For Simpson, Homer, the following relationships are shown: Biological Father to Simpson, Bart; Biological Father to Simpson, Lisa; Spouse to Simpson, Marge; and a dropdown menu for Simpson, Maggie. The dropdown menu is open, showing a list of relationship types, with 'Adoptive Brother' selected and circled in red. Other relationship types in the list include Adoptive Child, Adoptive Parent, Adoptive Sibling, Adoptive Son, Alleged Child, Alleged Father, Alleged Parent, Alleged Son, Biological Brother, Biological Child, Biological Father, Biological Parent, Biological Son, Boyfriend, Brother-in-Law, and Child of Unmarried Partner.

The **Participants** screen appears displaying the **Participant Relationship** below it. The **Number of Unspecified Relationship** will no longer have a number next to the relationships when all the relationships are complete.

Adding Participant Roles

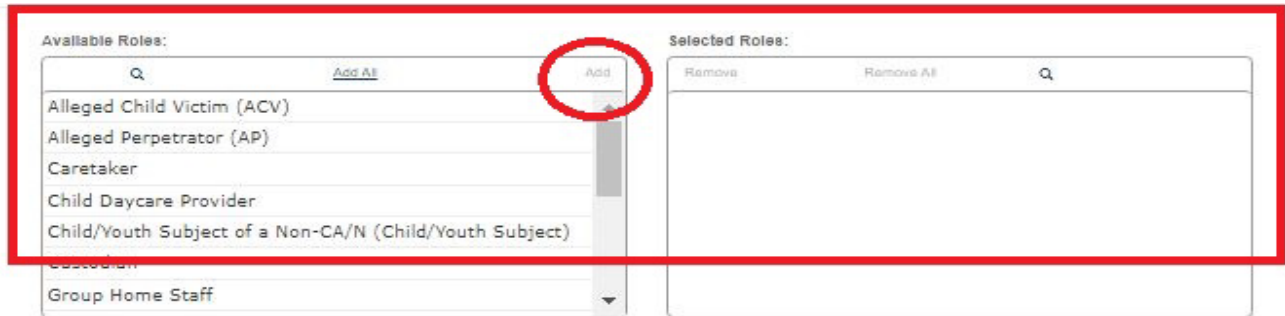
1. To add a participant role, click the **Edit** link to the left of the person's name.

The screenshot shows the 'Participants' screen. At the top, there are tabs for Reporter, Basic, Participants, ACV/AP Detail, Allegations, Substance Use, and Decision. Below the tabs, there are buttons for 'Search & Add Participants' and 'Participant Roles'. The list of participants is as follows: Simpson, Bart (Alleged Child Victim (ACV), Male 10, 01/01/2012 | History); Simpson, Homer (Alleged Perpetrator (AP), Male 42, 01/01/1980 | History, Other Roles: Parent, Caretaker); Simpson, Lisa (Alleged Child Victim (ACV), Female 8, 01/01/2014 | History); Simpson, Maggie ([*] Female 2, 01/01/2020 | History); and Simpson, Marge (Parent, Female 37, 01/01/1985 | History, Other Roles: Caretaker). The 'edit' link for Simpson, Maggie is circled in red.

Adding Information to a Screened-In Intake

The **Participant Details** screen appears.

2. Select the role(s) in the **Available Roles** field.
3. Click the **Add All or Add** button to add role(s) to the **Selected Roles** field.
4. When complete, click the **OK** button.



The screenshot shows two panels: 'Available Roles' and 'Selected Roles'. The 'Available Roles' panel has a search bar, 'Add All', and 'Add' buttons. A red circle highlights the 'Add' button. Below the buttons is a list of roles: Alleged Child Victim (ACV), Alleged Perpetrator (AP), Caretaker, Child Daycare Provider, Child/Youth Subject of a Non-CA/N (Child/Youth Subject), and Group Home Staff. The 'Selected Roles' panel is currently empty and has 'Remove', 'Remove All', and a search bar.

The **Participants** screen appears displaying the selected role(s) in the **Role** column.

ACV/AP Detail Tab

NOTE: No edits are allowed post-decision

Allegations Tab

***NOTE*:** Allegations can only be added for the intake type(s) selected on the Basic tab.

1. To add new allegations, click the **Allegations** tab.
2. To add a new allegation, click the **Add Allegation** button.



The screenshot shows the 'Allegations' tab selected in a navigation bar. Below the navigation bar is a blue header for 'Allegation Details'. A red box highlights the 'Add Allegation' button. To the right of the button are two icons: a checkmark and a trash can. Below the header is a table with the following content:

| | |
|------------------------------|--|
| Physical Abuse 10/26/2022 | ACV/CSR Simpson, Bart AP/ASR Simpson, Homer Reported By: Flanders, Ned (12345) - 10/26/2022 09:39 AM |
|------------------------------|--|

The Add **Allegation(s)** screen appears displaying the three **Allegation Detail** pusher boxes.

Adding Information to a Screened-In Intake

3. Select a value in the **Reported By:** drop-down.
4. Add the **Incident Date**.
5. Choose the **Available Alleged Child Victims/Child Subjects of Report** by highlighting their name in the box and selecting the **Add** or **Add All** button to place them in the **Selected ACV/CSR** box.
6. Repeat this process for the **Alleged Perpetrator/Adult Subjects of Report** and **Available Allegation Types**.
7. Click the **OK** button when done.

Add Allegation(s)

Allegation Reporter Details

Reported By: * Ned Flanders | - 10/20/2022 09:34 AM

Current Narrative (saved 10/23/2022 11:10 am)

Allegation Details

Incident Date: * Date is estimated ⓘ

| Available Alleged Child Victims/ Child Subjects of Report : | Selected Alleged Child Victims/ Child Subjects of Report : |
|---|--|
| <input type="text"/> <input type="button" value="Add All"/> <input type="button" value="Add"/> Simpson, Bart Simpson, Lisa Simpson, Maggie | <input type="button" value="Remove"/> <input type="button" value="Remove All"/> <input type="text"/> |

| Available Alleged Perpetrators/ Adult Subjects of Report : | Selected Alleged Perpetrators/ Adult Subjects of Report : |
|--|--|
| <input type="text"/> <input type="button" value="Add All"/> <input type="button" value="Add"/> Simpson, Homer | <input type="button" value="Remove"/> <input type="button" value="Remove All"/> <input type="text"/> |

| Available Alleged Perpetrators/ Adult subjects of Report : | Selected Alleged Perpetrators/ Adult Subjects of Report : |
|--|--|
| <input type="text"/> <input type="button" value="Add All"/> <input type="button" value="Add"/> Simpson, Homer | <input type="button" value="Remove"/> <input type="button" value="Remove All"/> <input type="text"/> |

| Available Allegation Types: | Selected Allegation Types: |
|---|--|
| <input type="text"/> <input type="button" value="Add All"/> <input type="button" value="Add"/> Neglect Physical Abuse Emotional Maltreatment/Mental Injury | <input type="button" value="Remove"/> <input type="button" value="Remove All"/> <input type="text"/> |

Adding Information to a Screened-In Intake

The Allegation Details screen appears with the Saved Information regarding the allegations.

The screenshot shows the 'Allegation Details' screen with tabs for Reporter, Basic, Participants, ACV/AP Detail, Allegations, Substance Use, and Decision. The 'Allegation Details' section has an 'Add Allegation' button and two icons (envelope and trash). Below is a list of allegations:

| Allegation | ACV/CSR | API/ASR | Reported By | Date/Time |
|--|-------------------------|------------------------|------------------|---------------------|
| Neglect 10/19/2022 | ACV/CSR Simpson, Bart | API/ASR Simpson, Homer | Ned Flanders () | 10/20/2022 08:34 AM |
| Physical Abuse 10/19/2022 | ACV/CSR Simpson, Bart | API/ASR Simpson, Homer | Ned Flanders () | 10/20/2022 08:34 AM |
| Neglect 10/19/2022 | ACV/CSR Simpson, Lisa | API/ASR Simpson, Homer | Ned Flanders () | 10/20/2022 08:34 AM |
| edit [] Emotional Maltreatment/Mental Injury 10/20/2022 | ACV/CSR Simpson, Maggie | API/ASR Simpson, Homer | Ned Flanders () | 10/20/2022 08:34 AM |

Adding Additional Comments about Intake

The **Post-Decision Amendment** must be completed to save the record. To do so:

1. Click the **Basic** tab.
2. Click the **Post-Decision Amendment** button.

Adding Information to a Screened-In Intake

The screenshot shows a web interface for adding information to a screened-in intake. The 'Basic' tab is selected and highlighted with a red box. The 'Intake Narrative' field contains the text: "The father is always drinking and gets drunk. He gets angry and abusive towards Bart and was seen strangling him." Below this, the 'Post-Decision Narrative Amendment' field is highlighted with a red box. The 'Decision Comment:' field shows a timestamp: "10/29/2022 10:00 AM -". To the right, the 'Intake Type' section includes fields for 'Intake Workload Name' (Simpson), 'Intake Category' (CA/N Report), and two lists of intake types: 'Intake Types' (Baby Doe/Disabled Infant, Emotional Maltreatment, Medical Neglect, Physical Abuse Shaken Baby, Sexual Abuse) and 'Selected Types' (Neglect, Physical Abuse). Below these are 'Other intake Designations' with several questions and radio button options (Not Assessed, No, Yes) and dropdown menus (No).

The **Post-Decision Narrative** screen appears.

3. Type comments in the **Post-Decision Narrative Amendment** field.
4. Click the **Ok** button.

The screenshot shows the 'Post-Decision Narrative' screen. The 'Current Narrative' section is visible, along with a 'Narrative Amendments' section. The 'Post-Decision Narrative Amendment:' field is highlighted with a red box. Below this field, there is a 'Previous Narrative Amendments' section. At the bottom of the screen, the 'Ok' button is highlighted with a red box.

Adding Information to a Screened-In Intake

Important: Once the narrative is saved, the system will display:

- The **Post-Decision Narrative Amendments** field
- The name of the logged in worker (who added the information, along with the date and time the information was added.

The screenshot displays a web form for adding information to a screened-in intake. On the left, a text area titled 'Post-Decision Narrative Amendments:' contains the text '12/08/2022 10:13 AM - Worker, Wendy test'. Below this is a 'Post-Decision Amendment' button and a 'Decision Comments:' section with the text '12/07/2022 04:13 PM - Worker, Wendy test'. To the right, there are several decision questions with dropdown menus and checkboxes. The questions are: 'Does this report require a Specialized Assessment/Investigation?' (No), 'Does this report require Third Party involvement due to a potential conflict of interest?' (No), 'This report involves the following substance use concerns (check all that apply):' (with checkboxes for 'Abuse of legal or illegal substances by any family member', 'An infant identified as affected by legal or illegal substance use (including positive toxicology for any substance at birth)', 'An infant having withdrawal symptoms resulting from prenatal drug exposure (legal or illegal)', 'An infant diagnosed with Fetal Alcohol Spectrum Disorder', and 'None of the above'), 'How did the reporter become aware of the substance abuse?' (Positive Toxicology), and 'Living arrangement at time of intake:' (Married two parent household (biological or...)).

5. Click **Save** at the bottom of the page to ensure all modified data is committed to the database.

The screenshot shows a row of four buttons: 'Apply', 'Save', 'Cancel', and 'Next'. The 'Save' button is highlighted with a red border.

Acronym List

- ACV – Alleged Child Victim
- AP – Alleged Perpetrator
- ASR – Adult Subject Report
- CSR – Child Subject Report
- CA/N – Child Abuse / Neglect
- FA – Family Assessment
- FINS – Family in Need of Services
- SA – Safety Assessment

Adding Information to a Screened-In Intake

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