

Finalizing an Adoption Record and Closing the Adoption Case



Knowledge Base Article

Finalizing an Adoption Record and Closing the Adoption Case

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Finalizing an Adoption Record and Closing the Adoption Case

Overview

This Knowledge Base Article discusses steps for completing the child's **Adoption Finalization Record** and closing the **Adoption Case** in SACWIS. However, this document does not provide a comprehensive list of all adoption-related work items that need to be completed.

Important: This section discusses tasks that must be done within SACWIS to **Seal and Secure** a child's adoption record that has reached a **Finalized Adoption** and to **Close** the adoption case. In some instances, you will need to Inactivate an Adoption Case Member(s) instead of sealing the adoption record, then close the adoption case. Please refer to the [Creating an Adoption Case & Reactivating a Child in an Adoption Case](#) Knowledge Base Article for details on inactivating the child(ren).

Important: SACWIS now validates that there is a completed **Case Closure/Review** within 30 days of the adoption case closure. If upon sealing the child(ren) or inactivating any adoption case members, you will be immediately closing the adoption case, then you will need to complete the Case Closure/Review work item in SACWIS pursuant to **5101: 2-38-09**. In order to complete this review, you will also need to ensure there is a completed current (approved) case plan **prior** to the child's finalization or inactivation in SACWIS.

In addition to these tasks, other mandated adoption work items still need to be completed, such as the pre-adoptive staffings, search potential adoptive families, matching conferences, case plans, IL plans, case reviews / SARs, monthly visits, activity logs, and pre-finalization adoption assessment. However, discussing specifics about these other tasks is not within the scope of this Knowledge Base Article. If needed, please refer to the following related Knowledge Base Articles for additional information:

- [Completing a Pre-Finalization Adoption Assessment](#)
- [Navigating Matching Conference Functionality](#)

Finalizing an Adoption Record and Closing the Adoption Case

Initializing the Finalization of an Adoption

To record the beginning information in preparation of the **Finalization** to seal a child's adoption record, complete the following steps:

1. In the child's **Adoptive Case**, navigate to the **Case Overview** screen.

The screenshot shows the 'Case Overview' screen for an adoption case. The top navigation bar has tabs for Home, Intake, Case, Provider, Financial, and Administration. The 'Case' tab is selected. Below the navigation bar, there are links for Workload, Court Calendar, and Placement Requests. The left sidebar contains a list of navigation options, with 'Finalization Checklist' highlighted in red. The main content area displays case details for 'Adoption' (Case Name / ID: Sacwis, Susie / 123456, Open 04/01/2023). Below this, there are sections for ADDRESS, CONTACT, AGENCY (Test County Children Services Board), PRIMARY WORKER (Test, Worker), and SUPERVISOR(S) (Test, Supervisor). There is also a 'Case Actions' section with links for View Member Details, Access Original Case, Program Categories, Case Status History, and View Adoption Subsidies. At the bottom, there are navigation buttons for Action Items, Case Alerts, Dashboard, and Assignments / Eligibility.

2. Click the **Finalization Checklist** link in the Navigation menu.

The **Adoption Finalization Checklist Information** screen appears.

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Adoption Finalization Information Filter Criteria

All Persons Children Sealed/Secured Active Children

Filter

Adoption Finalization Checklist Information

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

Name	Person ID	DOB		Adoption Finalized Date	Status
Sacwis, Susie	123456	10/31/2008	Finalization Information		

3. Click the **Finalization Information** link for the desired child.

The **Finalization Details Page** appears.

Finalization Details Page

Pre Adoptive Demographics

Name	Person ID	DOB	Age	Previously Adopted ^a	Documented Characteristics	Address
Sacwis, Susie	123456	10/31/2008	15	No	Yes	Unknown

Checklist Details

Motion: Petition to Adopt Date: _____ Ruling: Adoption Finalization Date: _____
Subsidy Eligibility Determined: ^a _____ N/A Adoption Subsidy Agreement Date: _____
Adoption Placement Date: _____ Adoption Info. Disclosure (JFS 01667) Signed Date: _____
Adoptive Home Approved/Active as of Finalization: _____

Withdrawn from OAPL Date: N/A
Social/Medical History (JFS 01616) Completed Date:
Primary Factor for Special Need Determination: ^a
Final Decree Received Date:
All sibling relationships have been updated and verified as current and accurate. Yes No

Post Adoptive Name/SSN Information

First Name: Middle Name:
Last Name: SSN: Retain Add/Edit

Apply Save Cancel Seal/Secure Record

Important: The fields shown in red above display **required** data that is recorded elsewhere in the application. This data must be recorded **prior** to sealing the child's adoption record.

Please refer to the following sections for additional information about these required fields.

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Recording the Previously Adopted Value and Documented Characteristics

Complete the following steps to if you need to record the **Previously Adopted** value and the **Documented Characteristics**.

1. On the **Finalization Details Page**, click the child's **Name** link.

Finalization Details Page						
Pre Adoptive Demographics						
Name	Person ID	DOB	Age	Previously Adopted	Documented Characteristics	Address
Sacwis, Susie	123456	10/31/2008	15	No	Incomplete	Unknown

The **Person Overview** screen appears.

- Person Overview
- Profile
- Education
- Medical
- Employment
- Military
- Background
- Delinquency
- SACWIS History
- Relationships

PERSON NAME / ID:
Sacwis, Susie / 123456

RACE: *American Indian, White*

Female Age 15, DOB 10/31/2008

HISPANIC / LATINO: *No*

Unknown

HAIR COLOR:

EYE COLOR:

ENVIRONMENTAL HAZARDS:

AKA Names

2. Click the **Profile** tab.

- Person Overview
- Profile
- Education
- Medical
- Employment
- Military
- Background
- Delinquency
- SACWIS History
- Relationships

PERSON NAME / ID:
Sacwis, Susie / 123456

RACE: *American Indian, White*

Female Age 15, DOB 10/31/2008

HISPANIC / LATINO: *No*

Unknown

HAIR COLOR:

EYE COLOR:

ENVIRONMENTAL HAZARDS:

AKA Names

The **Person Profile – Basic** screen appears.

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Basic Demographics Address Additional Characteristics Safety Hazard Confidential Information

Person Information

Prefix:

First Name: * Middle Name:

Last Name: * Suffix:

Populate AKA Name

3. Click the **Demographics** tab. The **Demographics Part 1** tab appears.

Basic Demographics Address Additional Characteristics Safety Hazard Confidential Information

Part 1 Part 2

Demographic Information

4. Click the **Part 2** link.

The **Demographics Part 2** tab appears.

Basic Demographics Address Additional Characteristics Safety Hazard Confidential Information

Part 1 Part 2

Birth/Adoption Information

Mother Married at Time of Birth: Previously Adopted:

Age Adopted: Date of Prior Adoption(Estimated):

5. In the **Birth/Adoption Information** section, select the appropriate **Previously Adopted** value.

Note: If you select the value 'Yes', then you must also enter the **Age Adopted**.

6. Click the **Apply** button at the bottom of the **Demographics Part 2** tab.

7. Click the **Characteristics** tab.

The **Documented Person Characteristics** screen appears.

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Basic Demographics Address Additional **Characteristics** Safety Hazard Confidential Information

Documented Person Characteristics

The Characteristics Tab supports Federal Reporting by allowing the worker to record diagnoses of medical or mental health conditions and supports the recording of helpful information which may assist the worker when making placement decisions for a child. ⓘ

A clinical assessment by a qualified medical or mental health professional has not yet been completed for this person.

A qualified professional has conducted a clinical assessment of this person and has determined this person has no clinically diagnosed conditions (Medical, Mental Health/Substance Abuse, Prenatal/Birth, or Developmental/Intellectual).

A qualified professional has conducted a medical exam or assessment of this person but the agency has not yet received the results.

Person Characteristics

Characteristic Type:

Created in Error Exclude Include ⓘ

Returned 0 Record(s)

Characteristic	Category	Method	Begin Date	End Date
----------------	----------	--------	------------	----------

8. Enter all of the applicable child **Characteristics**.

Note: Selecting the 'A clinical assessment by a qualified professional has not yet been completed for this person.' checkbox (shown in green above) will not mark the **Documented Characteristics** complete on the **Finalization Details** page.

9. When complete, click the **Save** button at the bottom of the **Characteristics** tab.

Person Characteristics

Characteristic Type:

Created in Error Exclude Include ⓘ

Returned 1 Record(s)

Characteristic	Category	Method	Begin Date	End Date
edit Allergies - Drug	Medical	Clinically Diagnosed	11/01/2023	

No additional known or applicable characteristics are documented for this person

The **Person Overview** screen appears.

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Person Overview

[Profile](#)
[Education](#)
[Medical](#)
[Employment](#)
[Military](#)
[Background](#)
[Delinquency](#)
[SACWIS History](#)
[Relationships](#)

PERSON NAME / ID:
Sacwis, Susie / 123456

RACE: *American Indian, White*

Female Age 15, DOB 10/31/2008

HISPANIC / LATINO: *No*

Unknown

HAIR COLOR:
EYE COLOR:

ENVIRONMENTAL HAZARDS:

AKA Names

10. Click **Close** at the bottom of the page.

The **Finalization Details Page** appears.

Finalization Details Page

Pre Adoptive Demographics

Name	Person ID	DOB	Age	Previously Adopted	Documented Characteristics	Address
Sacwis, Susie	123456	10/31/2008	15	No	Yes	Unknown

Checklist Details

Motion: Petition to Adopt Date: _____ Ruling: Adoption Finalization Date: _____
Subsidy Eligibility Determined: (a) _____ N/A Adoption Subsidy Agreement Date: _____
Adoption Placement Date: _____ Adoption Info. Disclosure (JFS 01667) Signed Date: _____
Adoptive Home Approved/Active as of Finalization: _____

Withdrawn from OAPL Date: N/A
Social/Medical History (JFS 01616) Completed Date:
Primary Factor for Special Need Determination: (a)
Final Decree Received Date:
All sibling relationships have been updated and verified as current and accurate. Yes No

Post Adoptive Name/SSN Information

First Name: Middle Name:
Last Name: SSN: Retain Add/Edit

Apply **Save** Cancel Seal/Secure Record

11. Enter the **Withdrawn from OAPL Date** OR select the **N/A** checkbox.

12. Enter the **Social/Medical History (JFS 01616) Completed Date**.

13. Select the **Primary Factor for Special Need Determination** value.

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14. Enter the **Final Decree Received Date**.

15. Select radio button for **All Sibling Relationships Have Been Updated and Verified as Current and Accurate**.

16. Enter the child's **Post Adoptive Name**.

Note: This name will be the **Post-Adoptive Person Name** as it is documented here. Please double-check spelling and accuracy **prior** to sealing the record. **As you enter the name in the Post Adoptive Name area, know that the name typed in these fields is the same name that appears on the child's medical card.**

17. Enter the child's **SSN** (if applicable).

18. Click the **Save** button.

Recording the Motion and the Ruling

Please refer to the following Knowledge Base Articles for additional details about recording the dates displayed in the **Motion: Petition to Adopt Date** and **Ruling: Adoption Finalization Date** fields on the Finalization Details Page.

- [Entering Hearings and Rulings](#)
- [Recording Legal Statuses with Custody Episodes](#)
- [Recording a Court Ruling with a Legal Status](#)

Recording the Subsidy Eligibility Determination

Important: When the system validates the completion of the **Subsidy Eligibility Determined** field on the Finalization Details Page, there must display a value of **AA**, **SAMS**, **Ineligible**, or **N/A** to be considered complete.

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Ohio SACWIS allows a child's record to be sealed and the adoption case to be closed even when an **AA Subsidy Determination** record has not been recorded in Ohio SACWIS.

Therefore, if the child might receive (or is going to receive) an AA subsidy, then **prior to sealing the child's adoption record, an AA Subsidy Determination record must be completed in Ohio SACWIS.**

At the time of the child's adoption finalization, if the adoptive family does not want to receive AA, but may want to receive AA in the future, then an **AA Subsidy Determination** record must still be recorded with a zero-dollar amount **prior to sealing and closing the adoption case.**

Please refer to the [Recording Adoption Assistance Subsidy](#) Knowledge Base Article for details about recording an AA Subsidy Determination record in Ohio SACWIS.

Recording the Adoption Placement Date

The read-only **Adoption Placement Date** field (shown in green below) pulls from the placement **Begin Date** field where the placement type = **Approved Adoptive Home**.

Finalization Details Page						
Pre Adoptive Demographics						
Name	Person ID	DOB	Age	Previously Adopted	Documented Characteristics	Address
Sacwis, Susie	123456	10/31/2008	15	No	Yes	Unknown

Checklist Details			
Motion: Petition to Adopt Date:	11/08/2023	Ruling: Adoption Finalization Date:	11/08/2023
Subsidy Eligibility Determined:	N/A	Adoption Subsidy Agreement Date:	
Adoption Placement Date:	11/30/2023	Adoption Info. Disclosure (JFS 01667) Signed Date:	09/01/2023
Adoptive Home Approved/Active as of Finalization:	Yes		

Recording the Placement Discharge

The system uses the placement discharge to determine the value for the **Adoptive Home Approved/Active as of Finalization** field (shown in green below). In most cases, the 180-day placement period has occurred at this point in the process and the adoptive placement is ready to be discharged.

Finalization Details Page						
Pre Adoptive Demographics						
Name	Person ID	DOB	Age	Previously Adopted	Documented Characteristics	Address
Sacwis, Susie	123456	10/31/2008	15	No	Yes	Unknown

Checklist Details			
Motion: Petition to Adopt Date:	11/08/2023	Ruling: Adoption Finalization Date:	11/08/2023
Subsidy Eligibility Determined:	N/A	Adoption Subsidy Agreement Date:	
Adoption Placement Date:	11/30/2023	Adoption Info. Disclosure (JFS 01667) Signed Date:	09/01/2023
Adoptive Home Approved/Active as of Finalization:	Yes		

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Note: When discharging the placement, the system will utilize the PC/PS termination date with reason 'Adoption Finalized' when determining the **Yes** or **No** value for the **Adoptive Home Approved/Active as of Finalization** field. The system will determine the value Yes for this field if either of the following criteria are met:

- If the PC/PS termination date falls within the date range covered by the **Adopt Care License effective date** through **Adopt Care License expiration date** span of the child's most recent Adoptive Care Placement record (not marked as 'created in error').

OR

- If the Adoptive Care 1692 approved effective date occurs prior to the PC/PS termination date.

Once the child's adoption has been finalized, you need to **Discharge the Placement** by completing the following steps:

1. In the child's **Adoptive Case**, navigate to the **Case Overview** screen.
2. Click the **Placement/ICCA** link in the Navigation menu.

The screenshot shows the 'Case Overview' screen. The navigation menu on the left includes links such as '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', 'Child Recruitment', 'Pre-Adoptive', 'Staffing/Matching Conference', and 'Placement/ICCA' (highlighted with a red box). The main content area displays a message 'Your data has been saved.' and case information: 'CASE NAME / ID: Sacwis, Susie / 123456' and 'Adoption Open (04/01/2023)'. Below this is the 'Adoption Finalization Information Filter Criteria' section with radio buttons for 'All Persons' (selected), 'Children Sealed/Secured', and 'Active Children'. A 'Filter' button is present. The 'Adoption Finalization Checklist Information' table shows one entry for 'Sacwis, Susie' with Person ID 123456, DOB 10/31/2008, and a link to 'Finalization Information'. The table has columns for Name, Person ID, DOB, Adoption Finalized Date, and Status. The page footer indicates 'Result(s) 1 to 1 of 1 / Page 1 of 1'.

The **Placement Records** screen appears.

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3. Click the **Edit** link in the appropriate row.

Placement / Non-Custodial Parent Records							
Result(s) 1 to 1 of 1 / Page 1 of 1							
	Child Name Age, DOB	Service Description	Provider Name / Non-Custodial Parent	Begin Date - End Date	Agency	Status	
edit authorize	Sacwis, Susie Age 15, 10/31/2008	Treatment Foster Care	Test, Provider	11/01/2021	Athens County Children Services Board	Completed	Actions... ▾

Child Name:

Add Placement Record

~ OR ~

Add Non-Custodial Parent Record

The **Service Information** screen appears.

4. In the **End Date** field, select the appropriate finalization date.
5. In the **End Reason** field, select the appropriate option.
6. If needed, enter a reason in the **Secondary End Reason** field.
7. In the **'Was there an effort to maintain placement?'** field, select **Yes** or **No**.
8. In the three **Narrative** fields, enter the appropriate content.

Status:
Completed

End Date:
11/08/2023 * The following end information will only be saved if an end date is entered

End Reason: Secondary End Reason:

Was there an effort to maintain placement?

Describe the services that were provided to maintain placement:

Explain the circumstances that led to the removal:

Additional Comments:

Created in Error

Apply Save Cancel

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9. Click the **Save** button at the bottom of the screen.

The **Placement Records** screen appears.

For additional information, please refer to the [Creating a Placement Discharge Record for AFCARS Reporting](#) Knowledge Base Article.

Recording/Viewing the Adoption Info Disclosure Activity Log

The read-only **Adoption Info Disclosure (JFS 01667) Signed Date** field (shown in green below) pulls from the **Start Activity Date** field of the **Activity Log** that meets the following criteria:

- Case Category = Adoption
- Category = Adoption
- Subcategory = Adoptive Information Disclosure (JFS 01667) Signed
- The Associated Participants include the specific child.
- Activity State = Completed

Finalization Details Page						
Pre Adoptive Demographics						
Name	Person ID	DOB	Age	Previously Adopted 	Documented Characteristics	Address
Sacwis, Susie	123456	10/31/2008	15	No	Yes	Unknown

Checklist Details			
Motion: Petition to Adopt Date:	11/08/2023	Ruling: Adoption Finalization Date:	11/08/2023
Subsidy Eligibility Determined: 	N/A	Adoption Subsidy Agreement Date:	
Adoption Placement Date:	11/30/2023	Adoption Info. Disclosure (JFS 01667) Signed Date:	09/01/2023
Adoptive Home Approved/Active as of Finalization:	Yes		

For additional information, please refer to the [Creating an Activity Log](#) Knowledge Base Article.

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Sealing the Child's Adoption Record

Complete the following steps to **Seal and Secure** the child's adoption record.

1. On the **Finalization Details Page**, click the **Seal/Secure Record** button.


Post Adoptive Name/SSN Information

First Name: Middle Name:

Last Name: SSN: Retain Add/Edit

Apply Save Cancel Seal/Secure Record

If the **Finalization Details Page** is not complete, you will receive the following message:

-  **12 validation message(s)** We found a few areas that need your attention:
- Motion: Petition to Adopt Date has not been recorded (Motion Type Petition to Adopt File Stamp Date).

2. Complete the Details page to resolve the validation error, if applicable.

Once the **Finalization Details Page** is complete, any outstanding validations will display. Examples include:

- Not all AFCARS adoption elements have been entered for that child.
- There are open services and service authorizations (except for adoption subsidy) that have not been closed.
- The child's last placement record has not been end dated.
- A discharge date and discharge reason has not been entered on the child's placement record.
- All associated ticklers to the child must be disposed.
- All draft Activity Logs for the child must be resolved.
- This child's Visitation Plan must be end dated or deleted.
- The child has an In Progress Pre-Finalization Adoption Assessment; please resolve.
- The child is a participant in a draft Attorney Communication; please resolve.
- There is an appeal(s) without an appeal outcome.
- Child is associated as a family team meeting (FTM) participant in a family team meeting in draft status.
- Child is a participant of a pending pre-adoptive staffing record.
- Child is a child to be matched or sibling to be included of an in-progress matching conference record.
- Child is a member of a draft Foster Care (FC) Exit Interview record.

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- Child has an in-progress or pending approval Foster to Adopt 1692 Homestudy record.
- The child is an intake participant of a Screened-In intake that does not have an Assessment/Investigation completion date.
- The child is a part of an uncompleted work item (Pre-Adoptive Staffing, Semi Annual Review, Safety Plan, Family Assessment, Safety Assessment, Ongoing A/I, Specialized A/I). The system will list the individual uncompleted work items.
- The child is a part of a pending approval work item (Semi Annual Review, Safety Plan, Family Assessment, Safety Assessment, Ongoing A/I, Specialized A/I). The system will list the individual pending approval work items.
- [Child Name] has been determined eligible for [AA, SAMS, or Non-Recurring Expenses]; the case service and service authorization must be completed.

3. **Resolve** the outstanding validations, if applicable.

If no outstanding validation messages are displayed, the **Adoption Case Security Approval Validation Details** screen will enable the **Submit for Approval** button.

Submit for Approval

Cancel

4. Click the **Submit for Approval** button.

The **Process Approval** screen appears.

5. In the **Action** field, select **Approved and Routed**.

6. In the **Reviewers/Approvers** field, select the appropriate name.

Process Approval

Work Item

ID:	Type: CASE	Reference:
Task ID:	Task Type: Secure Adopted Child Record	Task Reference:
		Task Status: Pending Approval

Routing/Approval Action

Action: *

Comments:

Agency:

Reviewers/ Approvers:

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- Click the **Save** button.
- The selected supervisor will then **Approve** the adoptive child's record to seal and secure it.
- Repeat** these steps for any siblings, as needed.

As shown in green, once the supervisor has approved the child's record, an **Approved** link appears on the **Adoption Finalization Checklist Information** screen.

Adoption Finalization Checklist Information					
Name	Person ID	DOB		Adoption Finalized Date	Status
Sacwis, Susie [INACTIVE]	16361243	07/03/2009	Finalization Information	10/25/2023	Approved

- If you wish to view the approval information, click the **Approved** link.

The **Process Approval** screen appears.

Process Approval					
Work Item					
ID:	Type:	CASE	Reference:		
Task ID:	Task Type:	Secure Adopted Child Record	Task Reference:		
			Task Status:	Approved	
Routing/Approval History					
1 Result(s)					
Date	Action	Status	Employee ID	Name	
10/25/2023 01:41 PM	Approved -Final	Approved			
	Comments				

Once the supervisor approves, the child's record is sealed.

Finalizing an Adoption Record and Closing the Adoption Case

Important Items to Note about Sealing and Securing Adoptions:

During the process of sealing and securing a child's adoption record, the system automatically completes several actions including:

- Issues the child a new identity by creating a **new** Person ID.
- Links the two Person IDs together (pre-adoptive vs. post-adoptive) "behind the scenes".
- Changes the child's name to the new adoptive name (recorded in the child's **Post Adoptive Name** section).
- Adds the child's post-adoptive Person ID as a permanent provider member in the provider record.
- Makes the child's pre-adoptive Person ID an Inactive case member of the adoption case (as of the PC/PS termination date, not the date the supervisor approved the Sealing/Securing of the record).

Once these actions occur, Ohio SACWIS maintains all of the child's pre-adoptive Person ID history (such as case history, intake history, case plans, removal records, court information, placement records, etc.) for the child's ongoing case and adoption case.

Viewing the Child's Pre-Adoptive Person ID History

To view the child's pre-adoptive Person ID history, complete the following steps:

1. Click the **Person Search** link in the **Search** menu at the top of the Ohio SACWIS screen.

The **Person Search Criteria** screen appears.

2. In the **Person ID** field, type the appropriate **Person ID**.

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Person Search
Intake Search
Case Search
Provider Search
Provider Match
Employee Search
Agency Search

Search For Person

Person ID: ~ OR ~ SSN:

Note: If Person ID or SSN are entered, all other search criteria will be ignored

OR

Last Name: First Name: Middle Name: Gender:

DOB: ~ OR ~ Age Range: -
From Age To Age

[Reference, ICN, and Address Criteria](#) v

Name Match Precision Sort by:
Returns results matching entered names including AKA names/nicknames

+ AKA/Nicknames

Fewer Results More Results

Search
Clear Form

3. Click the **Search** button.

The **Person Search Results** section appears at the bottom of the screen.

Person Search Results

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

Include only active case members

	Person Name / ID	Address	Gender	(Age) DOB	Active Case
view edit	Sacwis, Susie / 123456		Female	(14) 07/03/2009	

[Related Persons](#) v

4. Click the **Edit** link in the appropriate row.

The **Person Information** screen appears.

Finalizing an Adoption Record and Closing the Adoption Case

Person Overview

- [Profile](#)
- [Education](#)
- [Medical](#)
- [Employment](#)
- [Military](#)
- [Background](#)
- [Delinquency](#)
- [SACWIS History](#)
- [Relationships](#)

PERSON NAME / ID:
Sacwis, Susie / 123456

RACE: *American Indian, White*

Female Age 15, DOB 10/31/2008
Unknown

HISPANIC / LATINO: *No*

HAIR COLOR:

EYE COLOR:

ENVIRONMENTAL HAZARDS:

AKA Names

5. Click the **Ohio SACWIS History** link.

The **Ohio SACWIS History** screen appears.

SACWIS History

- Case Member History
- Case Associated Person History
- Intake Participant History
- Intake Reporter History
- Legal Custody Episode & Status History
- Placement History
- Living Arrangement History
- Legal Guardianship/Custody History
- Provider History
- Inquirer History
- Child of Interest History
- PSA History
- Employee History
- View Original Person

Close

6. Click the desired link, such as the **Case Member History** link.

The links expand as shown in the following example:

SACWIS History

Case Member History

Member Status	Case ID	Case Name	Case Category	Case Status	Case Status Date	Agency Primary Worker
<input type="checkbox"/> Inactive	111111		Ongoing	Closed	11/21/2022	Test County Children Services Board
<input style="border: 2px solid red;" type="checkbox"/> Inactive	123456	Sacwis, Susie	Adoption	Open	11/21/2022	Test County Children Services Board

Case Associated Person History

Intake Participant History

Intake Reporter History

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Viewing the Child's Post-Adoptive Person ID History

To view the child's post-adoptive **Person ID** history, complete the following steps:

1. Perform a **Person Search** using the child's **Post-Adoptive Name** (or **new Person ID**) using the steps previously discussed.
2. Navigate to the child's **Ohio SACWIS History** screen using the steps previously discussed.
 - The post-adoptive **Person ID Case Member History** and **Intake Participant History** will remain non-existent until when or if the child is involved in a new case through the Intake process.
 - The **Provider History** section now lists the child as a member of the adoptive care provider home and shows his or her post-adoptive Person ID.
 - If you have the appropriate security level, the **View Original Person** section displays the child's original Person ID and the name associated with that Person ID.
3. Click the desired link to view information.

As shown in green below, the child's post-adoptive **Case Member History** and **Intake Participant History** are non-existent, but the **Provider History** appears and (with the appropriate security role) the **View Original Person** section expands.

SACWIS History								
[-] Case Member History								
Member Status	Case ID	Case Name	Case Category	Case Status	Case Status Date	Agency Primary Worker		
[-] Case Associated Person History								
[-] Intake Participant History								
Intake Id	Intake Category	AR	Intake Type	Decision Date-Time	Case ID	Case Disposition	Disposition Date	Agency
[-] Intake Reporter History								
[-] Legal Custody Episode & Status History								
[-] Placement History								
[-] Living Arrangement History								
[-] Legal Guardianship/Custody History								
[-] Provider History								
Provider Id	Provider Name	Provider Status	Provider Type	Provider Type Status	Agency			
11735293	Test, Provider	Active	Adoptive Care	Active	TestCounty Children Services Board			
[-] Inquirer History								
[-] Child of Interest History								
[-] PSA History								
[-] Employee History								
[-] View Original Person								
Person ID	Child Name	Adoption Finalized Date						
123456	Sacwis, Susie	11/18/2016						

Finalizing an Adoption Record and Closing the Adoption Case

Completing the Adoption Case Closure

There are several reasons an adoption case can be closed, for example:

- The Child(ren) has reached Adoption Finalization.
- The Child is deceased; services are no longer being provided.
- The Child Legal Status (PC or PS) has changed.
- The Child reaches the age of majority and is no longer receiving adoption case services.
- Or any combination of the above when two or more siblings are in the same adoption case.

To **Close** an adoption case, complete the following steps:

1. Click the **Case Closure** link in the Navigation menu.

The screenshot displays the user interface of an adoption case management system. At the top, there is a navigation bar with tabs for Home, Intake, Case, Provider, Financial, and Administration. The 'Case' tab is selected and highlighted with a red box. Below this, there is a sub-navigation bar with 'Workload' (highlighted with a red box), 'Court Calendar', and 'Placement Requests'. On the left side, there is a vertical navigation menu with various links. The 'Case Closure' link at the bottom of this menu is highlighted with a red box. The main content area shows details for an adoption case, including the case name 'Sacwis, Susie / 123456', the agency 'Test County Children Services Board', and the primary worker 'Test, Worker'. Below the case details, there is a 'Case Actions' section with links for 'View Member Details', 'Access Original Case', 'Program Categories', 'Case Status History', and 'View Adoption Subsidies'. At the bottom of the main content area, there is a row of four buttons: 'Action Items', 'Case Alerts', 'Dashboard', and 'Assignments / Eligibility'.

Finalizing an Adoption Record and Closing the Adoption Case

The **Case Closure(s)** screen appears.



The screenshot shows a header bar labeled "Case Closure(s)". Below the header is a large white rectangular area with a blue button labeled "Add Case Closure" in the top-left corner. The button is highlighted with a red border.

2. Click the **Add Case Closure** button.

Note: There will always be only **one** Case Closure record per adoption case. Once an adoption case is closed, it cannot be reopened.

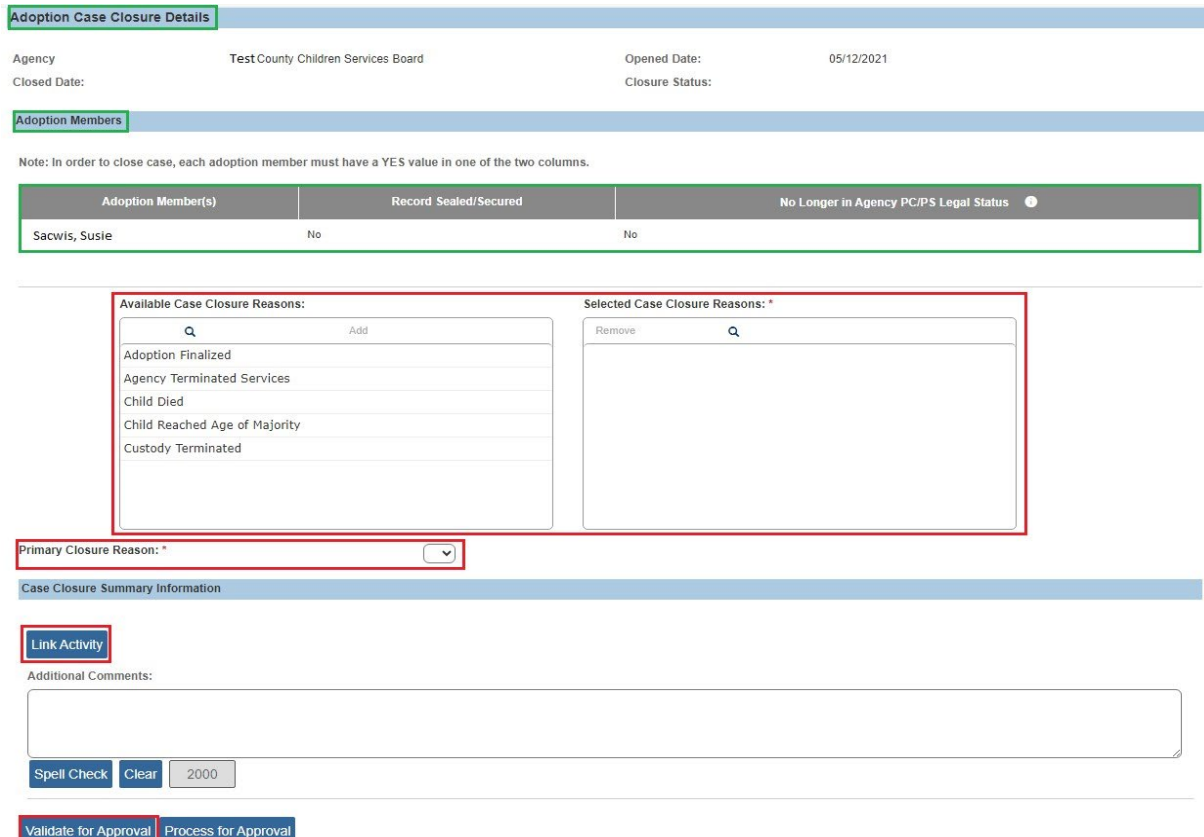
The **Adoption Case Closure Details** screen displays.

Note: As shown in green below, all **Adoption Members** will be displayed, along with a Note that in order to close the adoption case, each adoption member must have a Yes value in one of the two columns. The **Yes** value can result from either:

- Clicking the **Inactivate** link to make the child an Inactive member as described in the [Creating an Adoption Case and Reactivating a Child in an Adoption Case](#) Knowledge Base Article,

OR

- Sealing the child's adoption record.



The screenshot shows the "Adoption Case Closure Details" screen. At the top, there is a header bar labeled "Adoption Case Closure Details". Below the header, there are two rows of information: Agency (TestCounty Children Services Board) and Opened Date (05/12/2021), and Closed Date and Closure Status. Below this is a section labeled "Adoption Members" with a note: "Note: In order to close case, each adoption member must have a YES value in one of the two columns." Below the note is a table with three columns: "Adoption Member(s)", "Record Sealed/Secured", and "No Longer in Agency PC/PS Legal Status". The table has one row with the name "Sacwis, Susie" and "No" in both the second and third columns. Below the table are two panels: "Available Case Closure Reasons:" and "Selected Case Closure Reasons: *". The "Available" panel has a search bar and a list of reasons: "Adoption Finalized", "Agency Terminated Services", "Child Died", "Child Reached Age of Majority", and "Custody Terminated". The "Selected" panel has a search bar and is currently empty. Below the panels is a dropdown menu for "Primary Closure Reason: *". Below that is a section labeled "Case Closure Summary Information" with a "Link Activity" button. Below the button is a text area for "Additional Comments:" with a "Spell Check" button, a "Clear" button, and a "2000" character count. At the bottom are two buttons: "Validate for Approval" and "Process for Approval".

Finalizing an Adoption Record and Closing the Adoption Case

3. Select the appropriate **Case Closure Reason**.

Note: If multiple reasons exist, then select the most recent reason.

4. Click the **Link Activity** button, then link the desired Activity Log.

Note: If needed, record the Case Closure Summary Activity Log and then link it. For additional information, please refer to the [Creating an Activity Log](#) Knowledge Base Article. Please note that when creating a Case Closure Summary Activity Log, Participants are not required to save the record.

5. Enter any **Additional Comments**, if applicable.
6. Click the **Validate for Approval** button.

Any outstanding validations will display as shown in the example below.

Adoption Case Closure Validation Details	
Unresolved Item(s) for Closure	Message
Adoption Members	All adoption members must either be sealed/secured or no longer in agency PC/PS legal status.
Activity Log	No Case Closure Summary Activity Log has been recorded for the current case.
Activity Log	No Case Closure Summary Activity Log has been recorded on or after the Adoption Case Creation date.
Activity Log	All draft activity logs in the case must be resolved.
Case Plan Closure	A Family Case Plan Update for Case Closure is required.
Independent Living Plan	Olivia Bennett has a non-end dated Independent Living (IL) Plan.
Paid Services	Paid Services associated with the case have not been end dated (excluding adoption subsidies as these are not case services).
Unresolved Action Items	All action items associated with this case must be dismissed.
Open Legal Status	The child's legal status must be terminated prior to closing the case.

Close

7. Resolve the outstanding validations, if applicable.
8. When all validations have been resolved, click the **Process for Approval** button on the **Adoption Case Closure Details** screen.

Finalizing an Adoption Record and Closing the Adoption Case

Adoption Case Closure Details

Agency: Test County Children Services Board Opened Date: 05/12/2021
Closed Date: Closure Status:

Adoption Members

Note: In order to close case, each adoption member must have a YES value in one of the two columns.

Adoption Member(s)	Record Sealed/Secured	No Longer in Agency PC/PS Legal Status ?
Sacwis, Susie	No	No

Available Case Closure Reasons:

Q Add

- Agency Terminated Services
- Child Died
- Child Reached Age of Majority
- Custody Terminated

Selected Case Closure Reasons: *

Remove Q

- Adoption Finalized

Primary Closure Reason: *

Adoption Finalized ▼

Case Closure Summary Information

Link Activity

Additional Comments:

Spell Check Clear 2000

Validate for Approval Process for Approval

Note: Once an adoption case is closed, it cannot be reopened.

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