Adding Attorney Communication Information

Ohio SACWIS

Knowledge Base Article

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Adding Attorney Communication Information

Overview

The **Attorney Communication** functionality was requested by PCSA attorneys as a way to record in Ohio SACWIS the **non-discoverable** conversations that occur between PCSA attorneys and case workers. Additionally, case workers can record their non-discoverable conversations with the agency attorney for their own case load.

The system's security allows the creator of the **Attorney Communication** record to grant **View Only** access to anyone in the agency and later modify the access authorization if they choose. The creator will have **Edit** access while others in the agency will only see that a record was created.

Prior to using the **Attorney Communication** functionality in Ohio SACWIS, certain security user groups must be assigned to give users access rights. For the agency attorney, the security user group **Client Attorney** must be assigned. For agency case workers and supervisors, the security user group **All Case Workers** must be assigned. Please see your agency Ohio SACWIS Administrator for assignment of the appropriate security user group.

Users with either of the two Security Profiles mentioned above will be able to:

- Create an **Attorney Communication** record (if that user is assigned to the case and has been granted authorized access, or is an employee designated with the role of an attorney within the agency who "owns" the case).
- View both "**Draft**" and "**Completed**" **Attorney Communication** records (if the user created the record or was granted authorization to view the record).
- Acquire hierarchical access to the **Attorney Communication** record (for supervisors if their workers have been granted access).

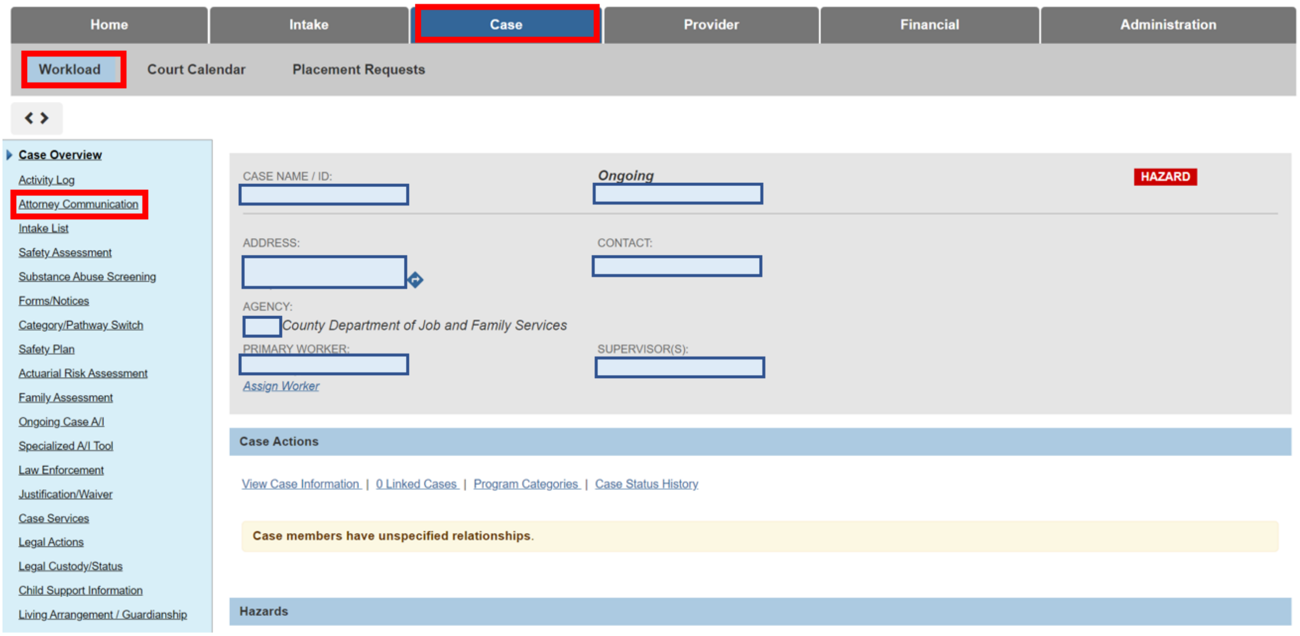
Navigating to the Attorney Communication Screen

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 **Attorney Communication** link in the **Navigation** menu.

Note:

- To find the appropriate case, you may also use other components of the Ohio SACWIS Search functionality.
- To have access to the **Attorney Communication** link, you must be assigned to a case unless you are a supervisor of a worker that is assigned to the case. You also need to

be assigned the security user group of **Client Attorney** (for PCSA attorneys) or **All Case Workers** to view, edit or create a specific record for which you have been granted access. Refer to the steps at the beginning of this Knowledge Base Article.



The **Attorney Communication Filter Criteria** screen appears displaying the **Attorney Communication** section below it.

Locating an Existing Attorney Communication Record

1. To locate an existing record(s), enter data in the filter section fields.
2. Click the **Filter** button.

The results appear in the **Attorney Communication** section in the bottom section of the screen.

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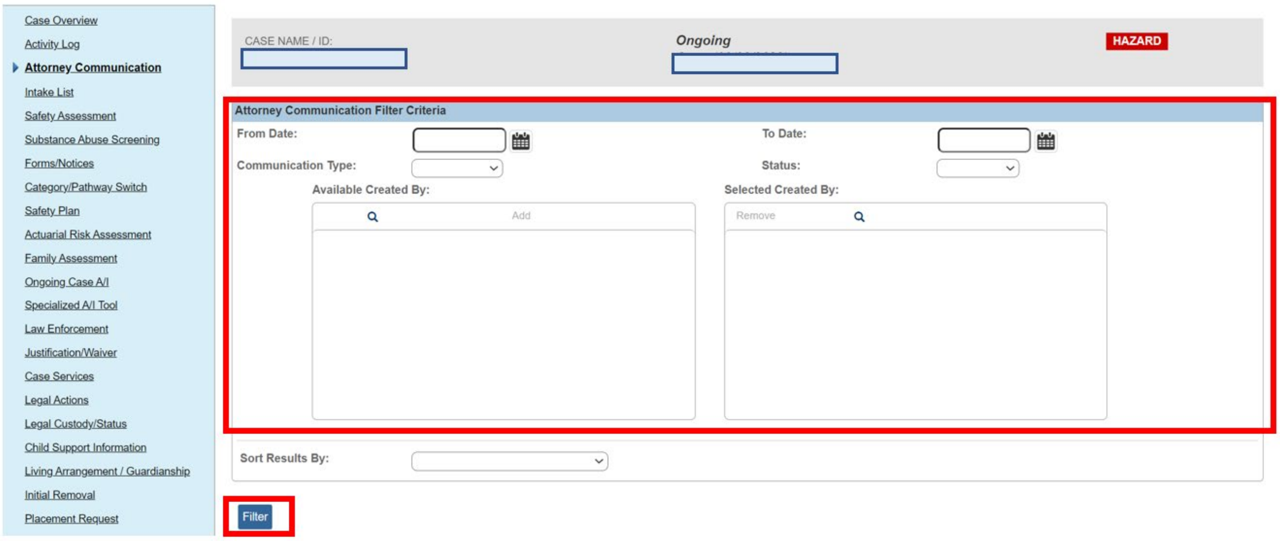
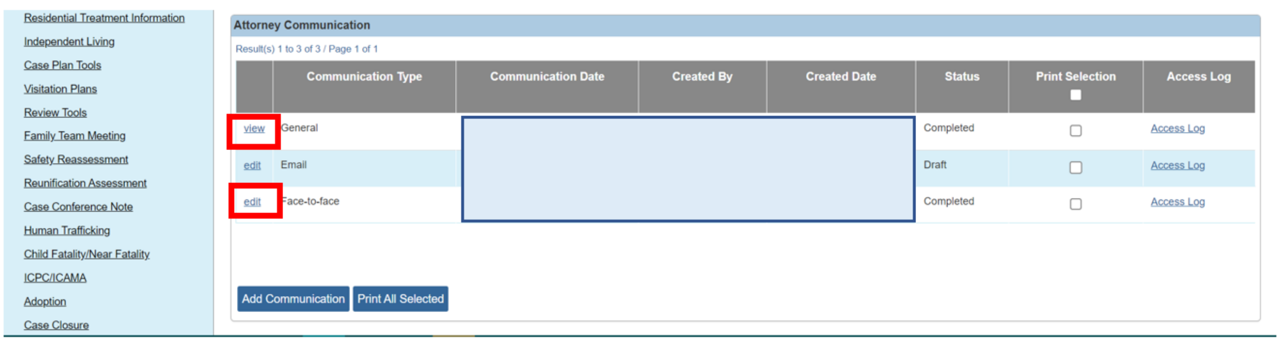
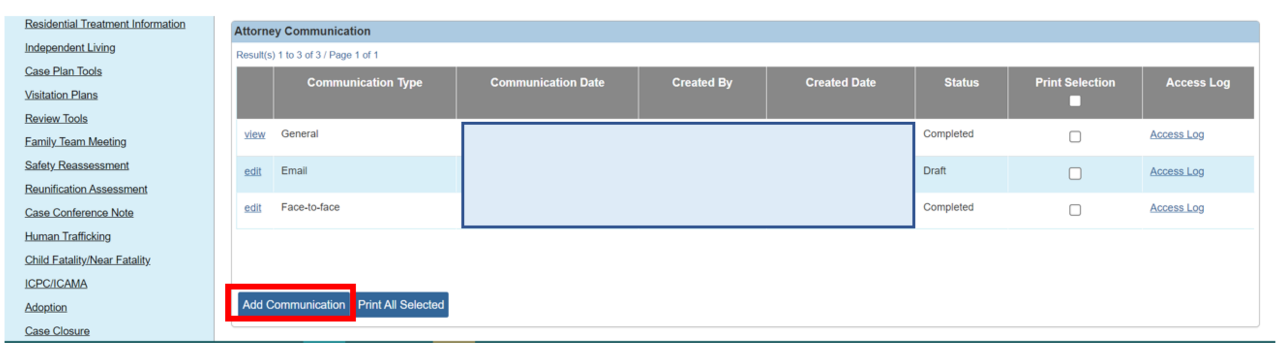


3. To edit the record, click the **Edit** link, then go to the **Editing an Attorney Communication Record** in this Knowledge Base Article.
4. To view information, click the **View** link.



Recording a New Attorney Communication

1. To enter a new record, click the **Add Communication** button.



The **Attorney Communication Association** screen appears.

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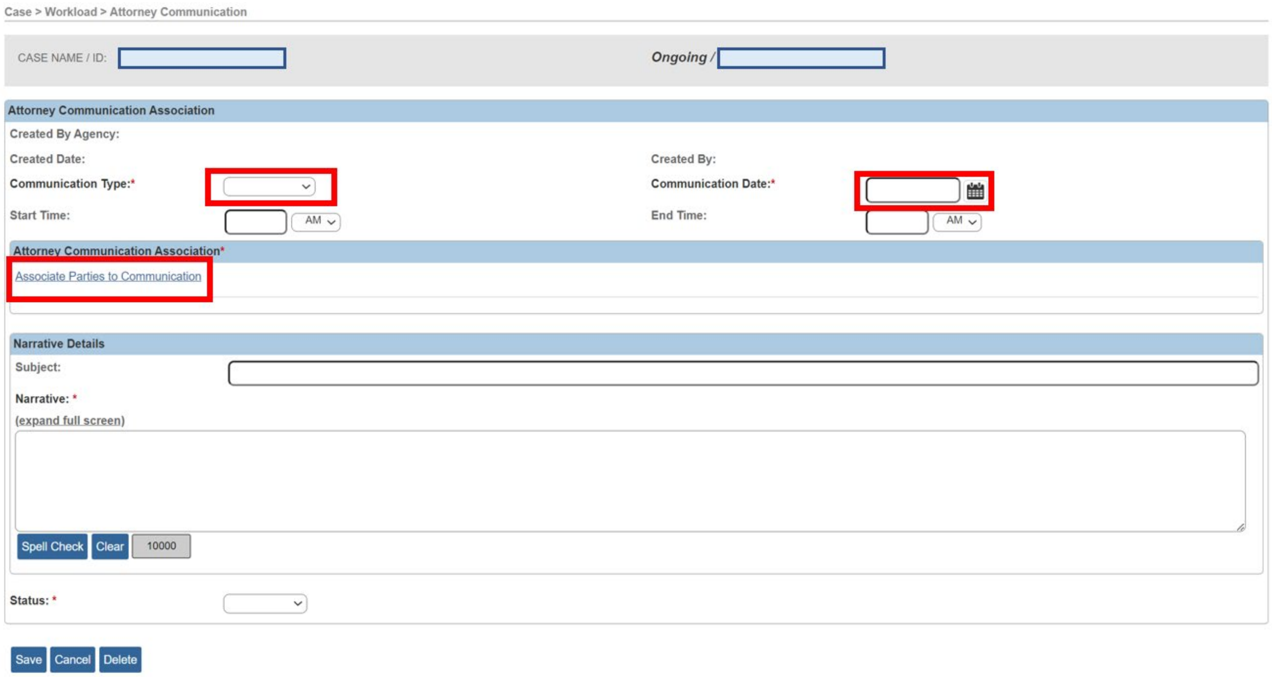
2. In the **Communication Type** field, select the appropriate type.
3. In the **Communication Date** field, enter the appropriate date.
4. To associate parties, click the **Association Parties to Communication** link.



The **Worker/Attorney** screen appears displaying **only** the:

- Case worker(s) currently assigned to the case and agency workers designated with the role of Attorney.

  Note: From the list of names (as discussed in more detail below), the record's creator can mark both the **Participated** and **Authorized Access** check boxes as needed. Or, add people to the list using the **Person Search** button.
- Person(s) marked as **Participated** or with **Authorized Access**

Note: This is a non-duplicated list; you cannot add the same person more than once per record.

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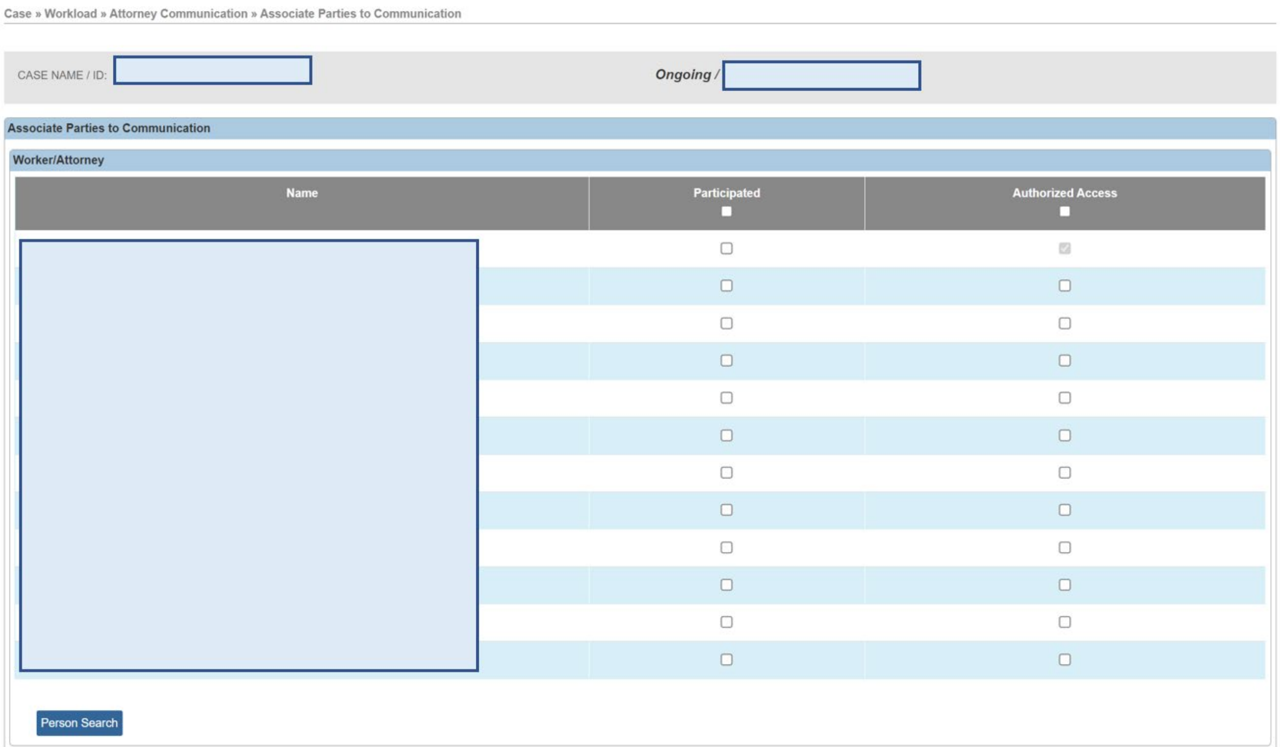

Completing the Worker/Attorney Section

1. In the **Participated** column, select the appropriate check box(es).
    - The **Participated** column checkmark identifies the participants involved in the communication.
    - These checkboxes **can be modified** as needed, even after the record has been marked as **Completed**.
2. In the **Authorized Access** column, select the appropriate check box(es).
    - The **Authorized Access** grants access to the communication record.
    - These checkboxes **can also be modified** as needed, even after the record has been marked as **Completed**.
    - As shown in gold, the record's creator is automatically marked as having been granted access. A grayed-out check box appears in the row with the record creator's name.
3. If needed, use the **Person Search** button to locate additional participants, or people who did not participate but need to be granted access.

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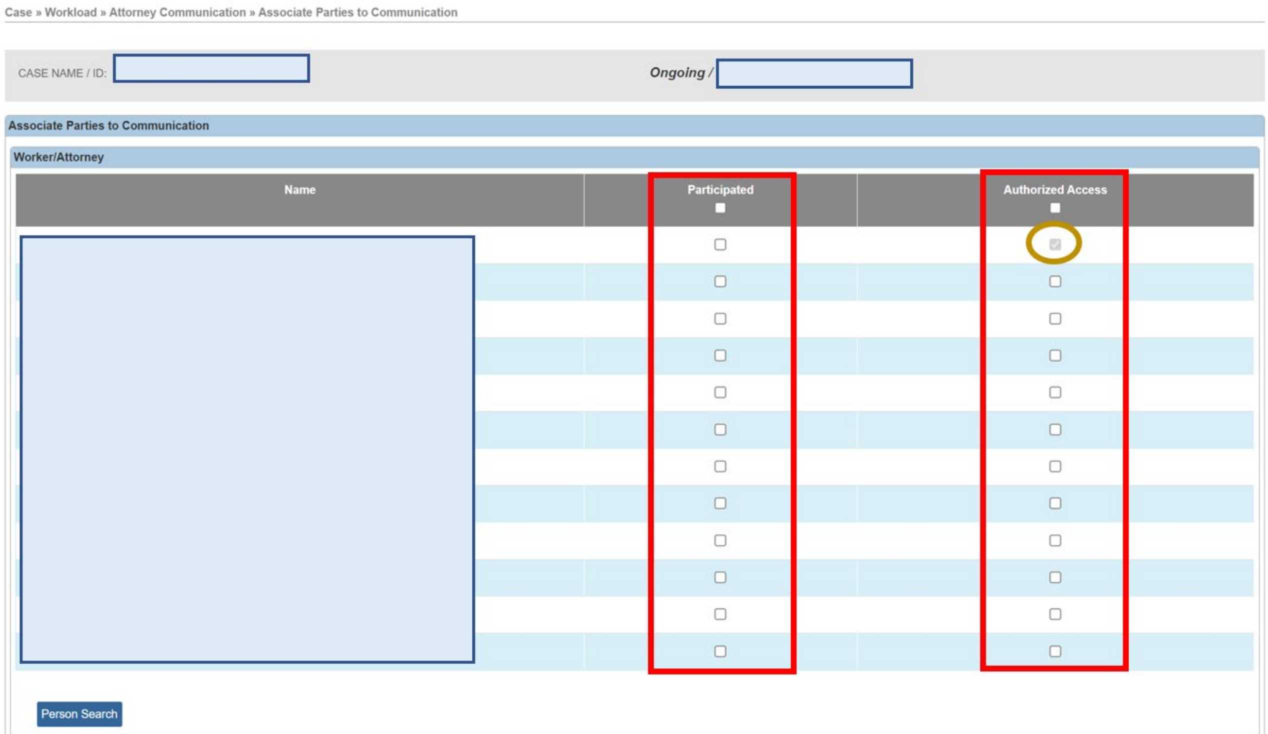
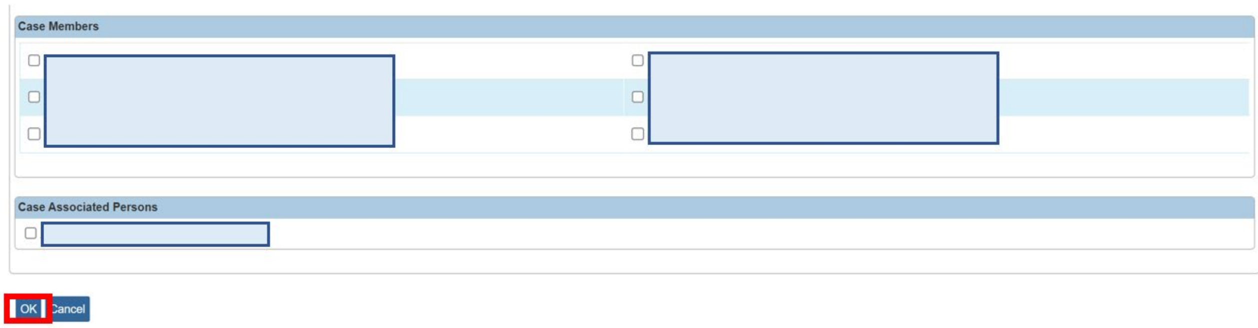
Note: The **Person Search** button is used to add participant(s) who already have Ohio SACWIS access, such as:

- Any agency worker
- An agency worker who may have previously participated in the case, or
- An agency worker no longer assigned to the case



Completing the Case Members and Case Associated Persons Sections

1. In the **Case Members** section, select the appropriate check box(es).
2. In the **Case Associated Persons** section, select the appropriate check box(es).
    - Both fields indicate who the discussion or conversation was regarding.
    - In these sections, at least one **case member** OR **case associated person** must be selected to save the record.
3. When complete, click the **OK** button at the bottom of the screen.



The **Attorney Communication Association** screen appears displaying the selected names (from the previous screen) as shown in green below.

Finalizing the Attorney Communication Record

1. In the **Subject** field, enter a subject line (as you would in an email).
2. Complete the **Narrative** text box.
3. In the **Status** field, select **Draft** or **Completed**.

Note: If needed, see the **Status Field (Draft / Completed) Business Rules** section below for additional information.

4. Click the **Save** button.

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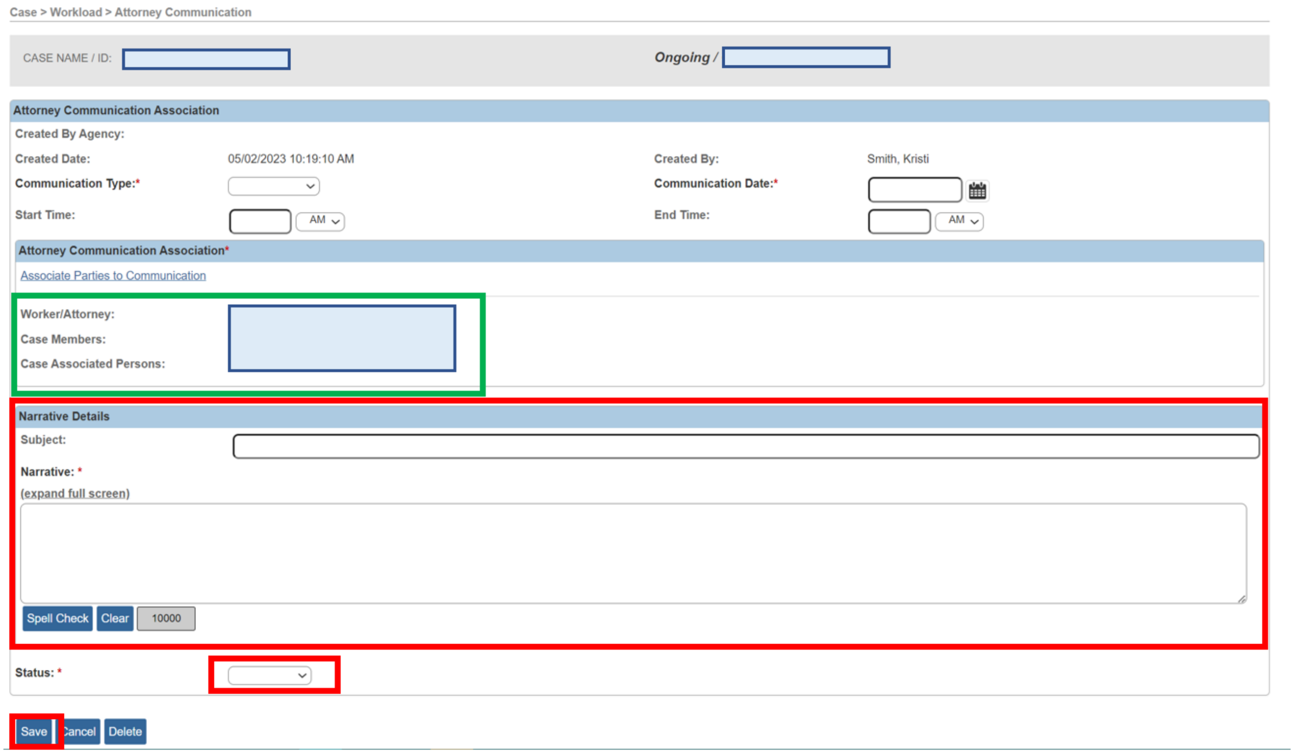
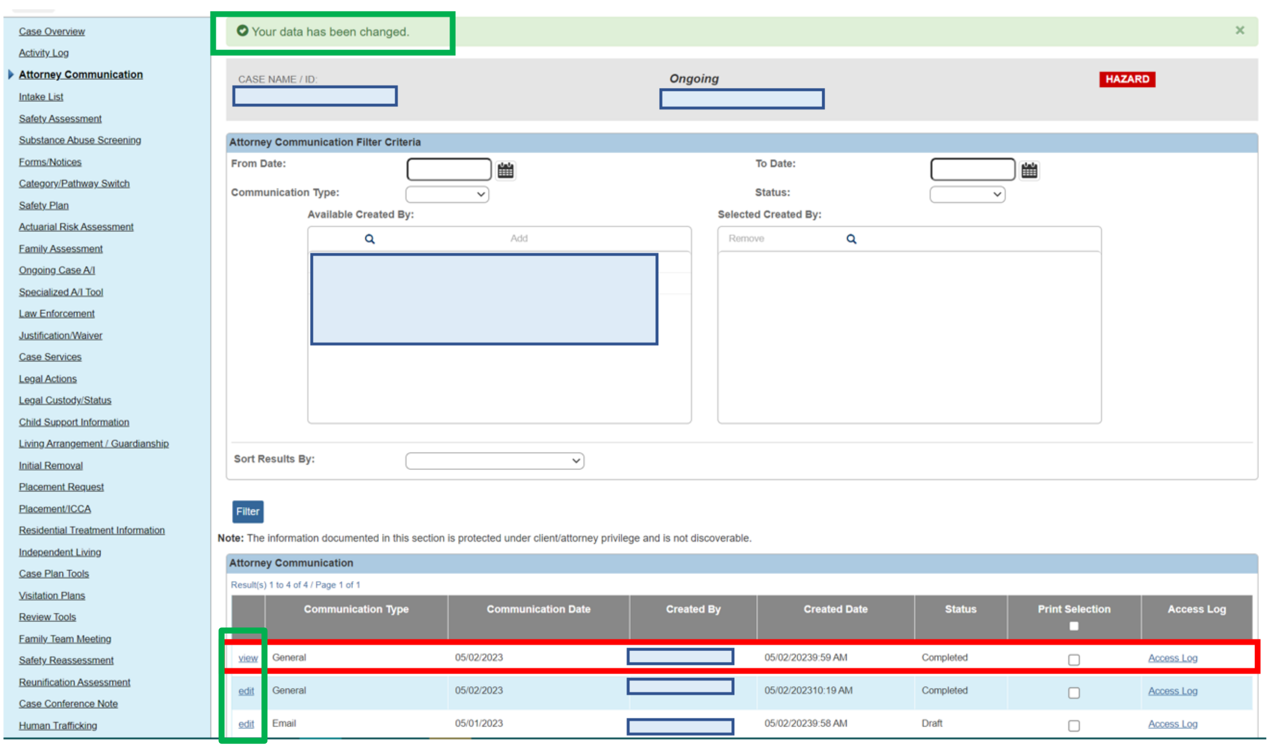


As shown below in red, the **Attorney Communication Filter Criteria** screen appears displaying the new **Attorney Communication** record in the grid. A message also appears at the top showing that your data has been saved.



Important Troubleshooting Information:

As shown above, if the user has the proper security profile to view this screen, all of the **Attorney Communication** records created for this case appear in the grid.

However, as shown in green:

- If the user created the record, an **Edit** link appears (but only to the person who created the record).
- If the record's creator granted view access rights, a **View** link appears.
- If the user was not granted any access by the record's creator, then the user can see that a record was created (a row appears in the grid), but no **Edit** link, **View** link, or **Print Selection** check box appears in that row.

Status Field (Draft / Completed) Business Rules

Regarding the **Status** field:

- An **Attorney Communication** record can only be deleted when it is in **Draft** status and only by the creator of the record. (This function is similar to how Activity Log works in Ohio SACWIS.)
- Once a record's status is marked as **Completed**, only the following items can be modified:
  - In the **Authorized Access** column, check mark (or remove) the check boxes as needed.
  - In the **Participated** column, check mark (or remove) the check boxes as needed.
  - In the **Worker/Attorney** section, add additional workers and/or attorneys to the record.
  - Insert narrative corrections through the **Narrative History** section as discussed below. (This function is similar to how Activity Log works in Ohio SACWIS.)
- Once an **Attorney Communication** record is saved in **Completed** status, it cannot be re-saved in **Draft** status.
- Case closure **does not** automatically update **Draft** record(s) to **Completed** status. Cases can be closed with **Draft** records and records can be edited on closed cases.
- Based on the system-defined security requirements, a record's **Edit** and **View** functionality remains available even after a case is closed.

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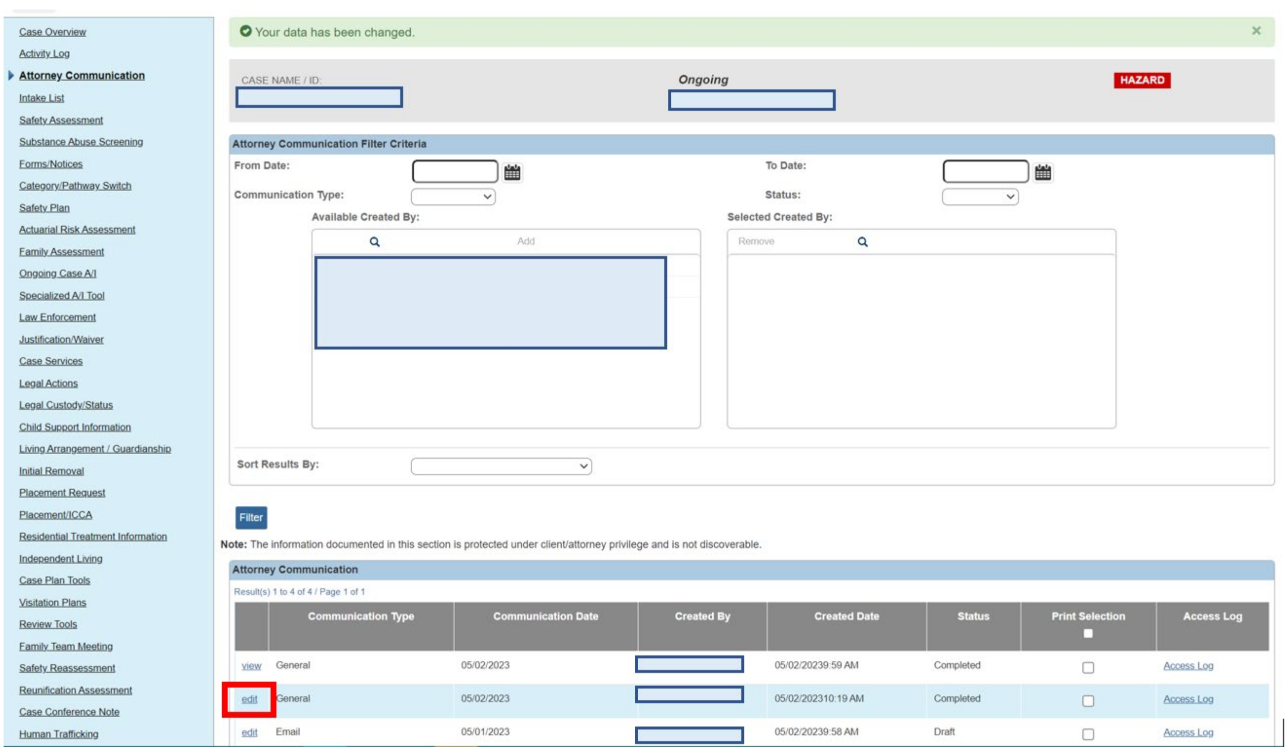
- Due to the sensitive nature of the information involved, **the State does not copy the Attorney Communication records** to any:
  - Ad Hoc reporting environment
  - Clone environment (i.e. staging)
  - Data warehouse

Editing an Attorney Communication Record

To insert a correction or edit a record, complete the following steps:

1. On the **Attorney Communication Filter Criteria** screen, click the **Edit** link in the appropriate row of the **Attorney Communication** grid.



The **Attorney Communication Association** screen appears.

2. Near the bottom of the screen, click the **Insert Correction** button.

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The **Correction Details** screen appears displaying original content in the **Existing Narrative** field (shown in gold below). This function is similar to how Activity Log works in Ohio SACWIS.

3. Type content in the **New Correction** field.
4. Click the **Save** button at the bottom of the screen.

The **Attorney Communication Association** screen appears displaying a new row within the **Narrative History** grid.

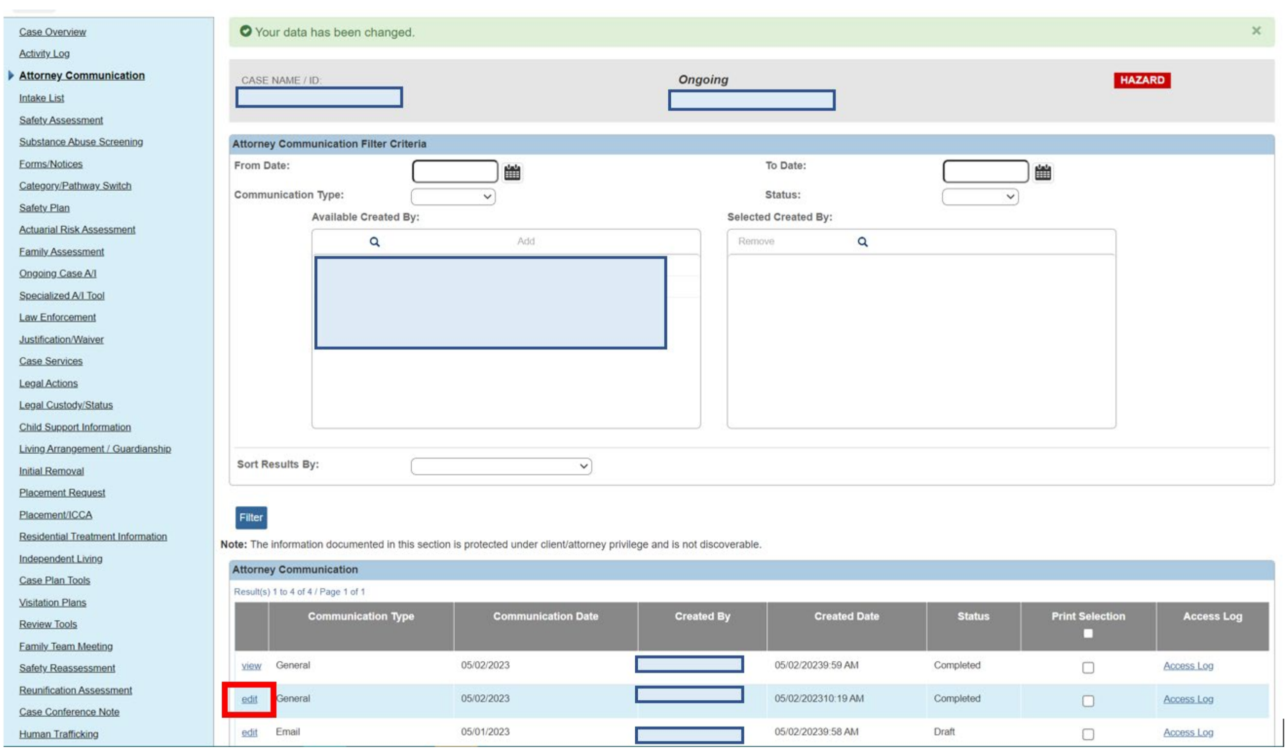
Note:

- When a correction is inserted, the system automatically lists the original record as **Original** and then numbers the first correction as **Correction 1** in the **Type** column.
- Ohio SACWIS also includes a date and time stamp for each record, along with the creator's name and their agency.
- The grid list order shows the most recent correction at the top.

5. When complete, click the **Save** button.

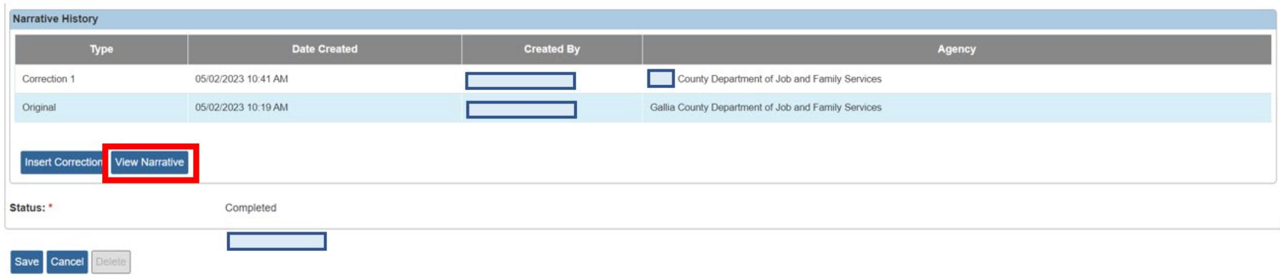
Viewing a Record’s Narrative History

1. On the **Attorney Communication Filter Criteria** screen, click the **Edit** link (or **View** link) in the appropriate row in the **Attorney Communication** grid.



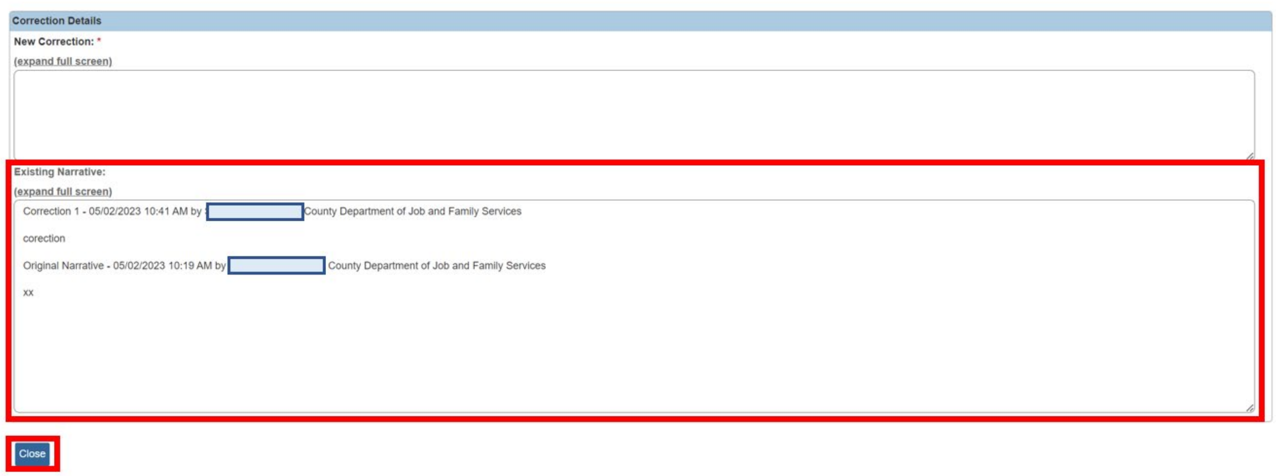
The **Attorney Communication Association** screen appears.

2. Near the bottom of the screen, click the **View Narrative** button.



The **Correction Details** screen appears.

3. View the previously entered narrative in the **Existing Narrative** field.
4. When complete, click the **Close** button.



The **Attorney Communication Association** screen appears.

Using the Access Log Link

The **Access Log** link shows which employee (or person) has been "looking" at this record. As these are **non-discoverable records**, they are **confidential** between the attorney and the agency worker(s). The **Access Log** link will be available if you have been granted authorized access to the record.

If others are accessing the record, this link can be used to determine who and when the access occurred. Additionally, selecting the **Print Selection** check box also logs a record in the **Access Log** link.

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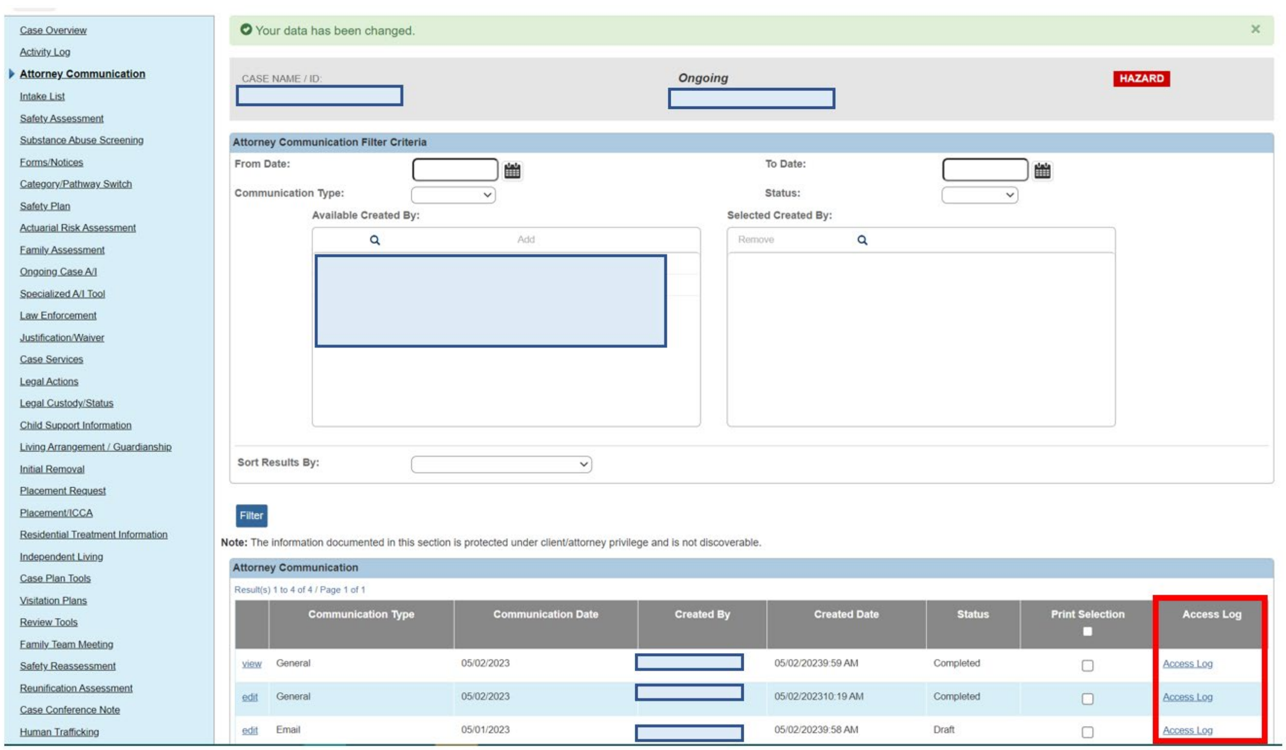
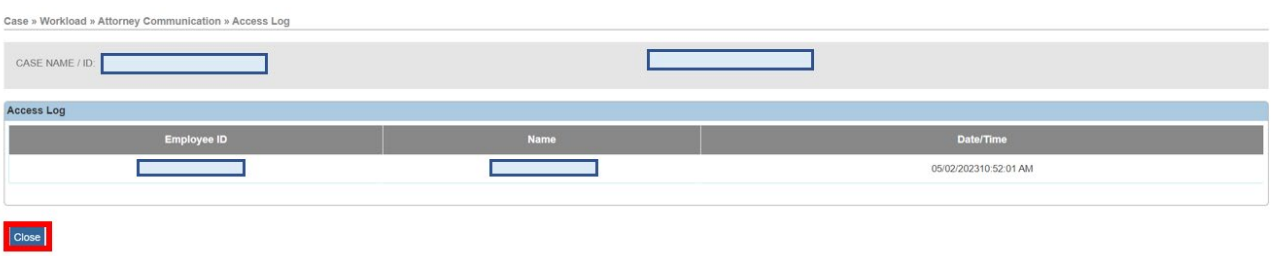
1. In the **Attorney Communication** section, click the **Access Log** link in the appropriate row.



The **Access Log** screen appears displaying the “viewer” information.

2. Determine who viewed the record and when.
3. When complete, click the **Close** button to return to the previous screen.



The **Attorney Communication** screen appears.

Printing an Attorney Communication Report

The **Attorney Communication** report is generated from a specific case record on the **Attorney Communication** screen. However, reports for multiple records can be printed at the same time and within the same report.

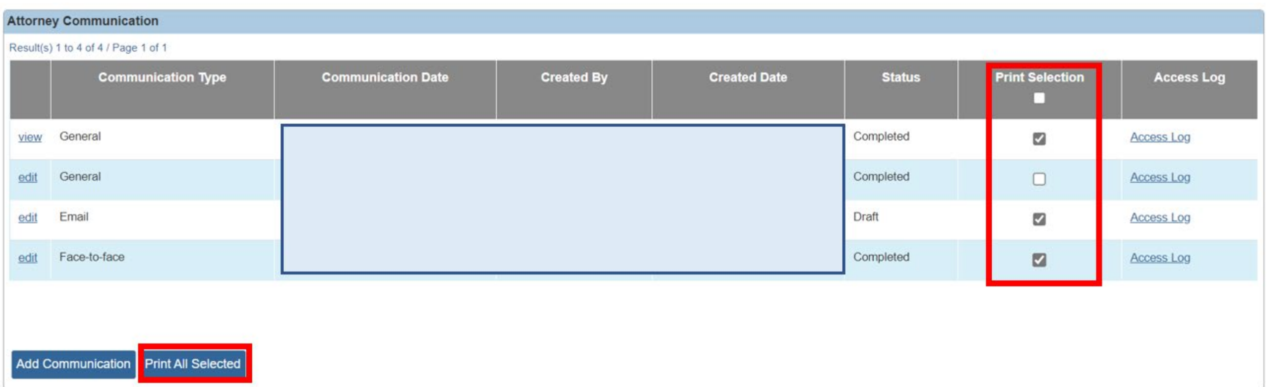
Due to the sensitive information involved, this report **cannot be saved** within Ohio SACWIS. The report must be printed. Users can only print reports for records that they have created or have been granted access to.

To print a report, complete the following steps:

1. In the **Print Selection** column (**Attorney Communication** section), click the check boxes for the report(s) that need to be printed.

   Or

2. Click the check box in the grid header to select all of the reports.
3. Click the **Print All Selected** button.



The **Document Details** screen appears.

4. Click the **Generate Report** button.

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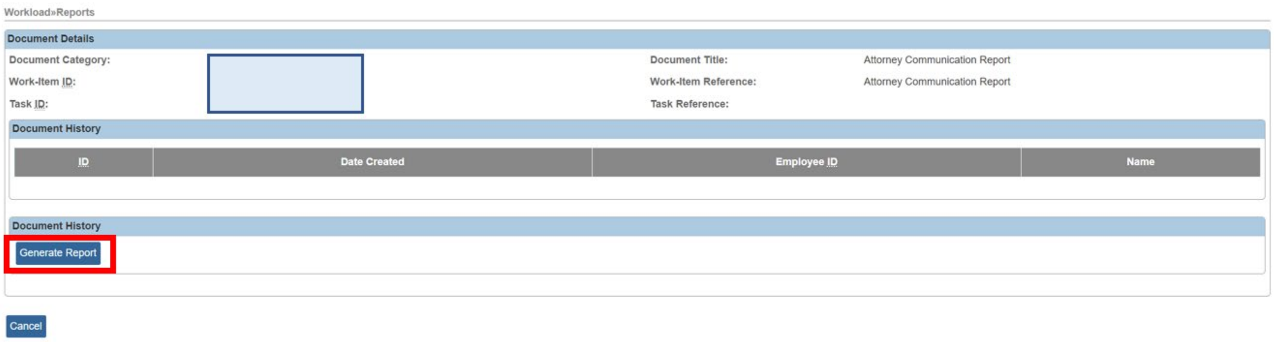
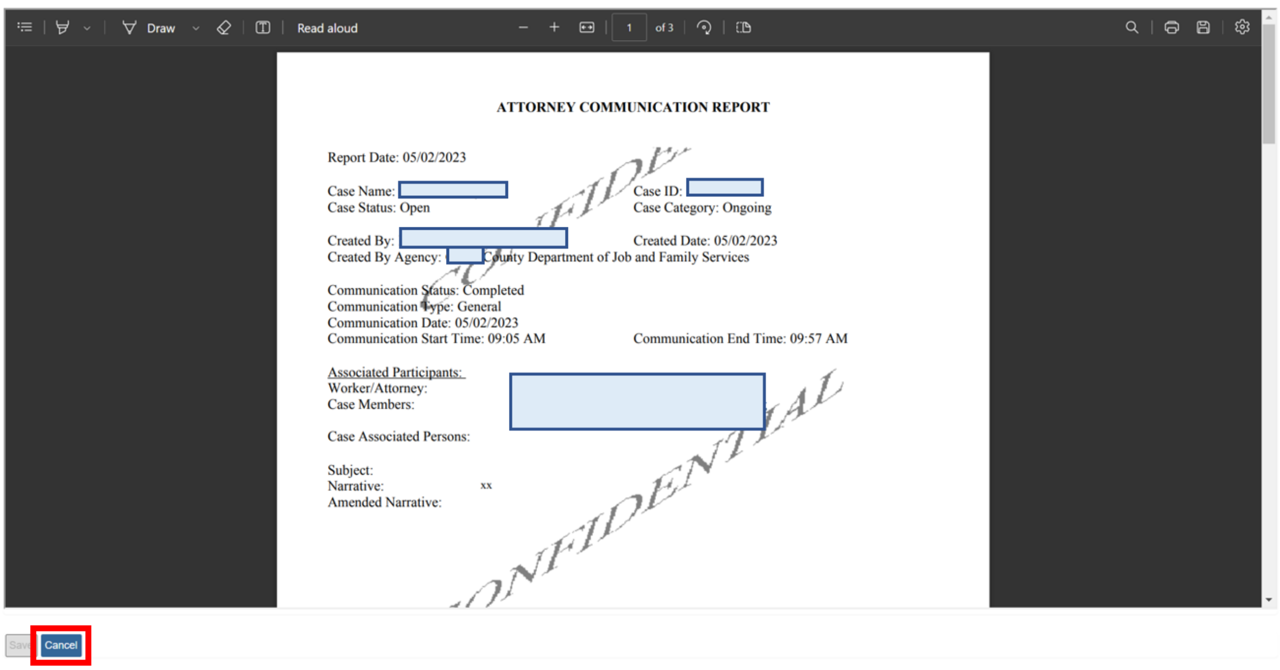


The **Attorney Communication Report** appears.

5. Click **Cancel** to return to the **Attorney Communication** screen.



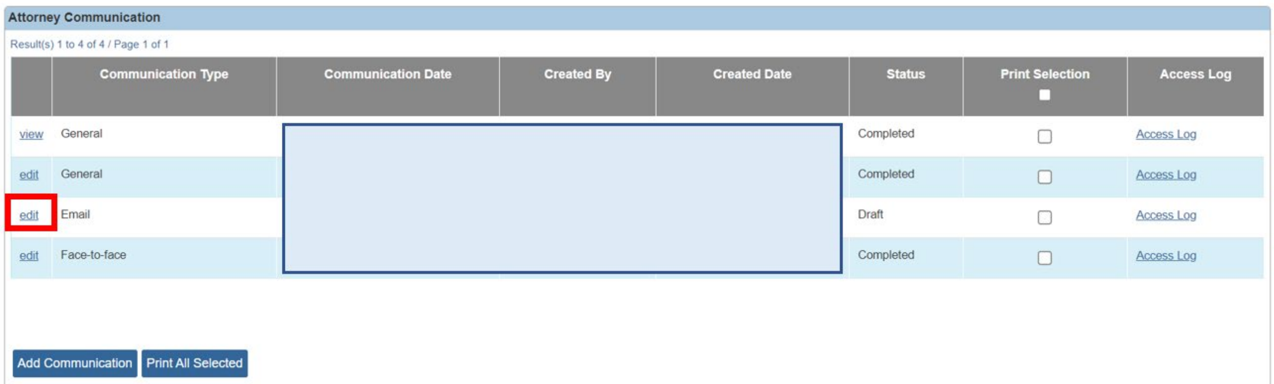
Additional Information about the Attorney Communication Report

- The **Report Date** only displays on the first page of the report.
- A **Confidential** watermark displays on all of the report pages, regardless of the communication record's status.
- A page break occurs between each communication record printed.
- This report prints by **communication date** and **time** in descending order.

Deleting an Attorney Communication Record

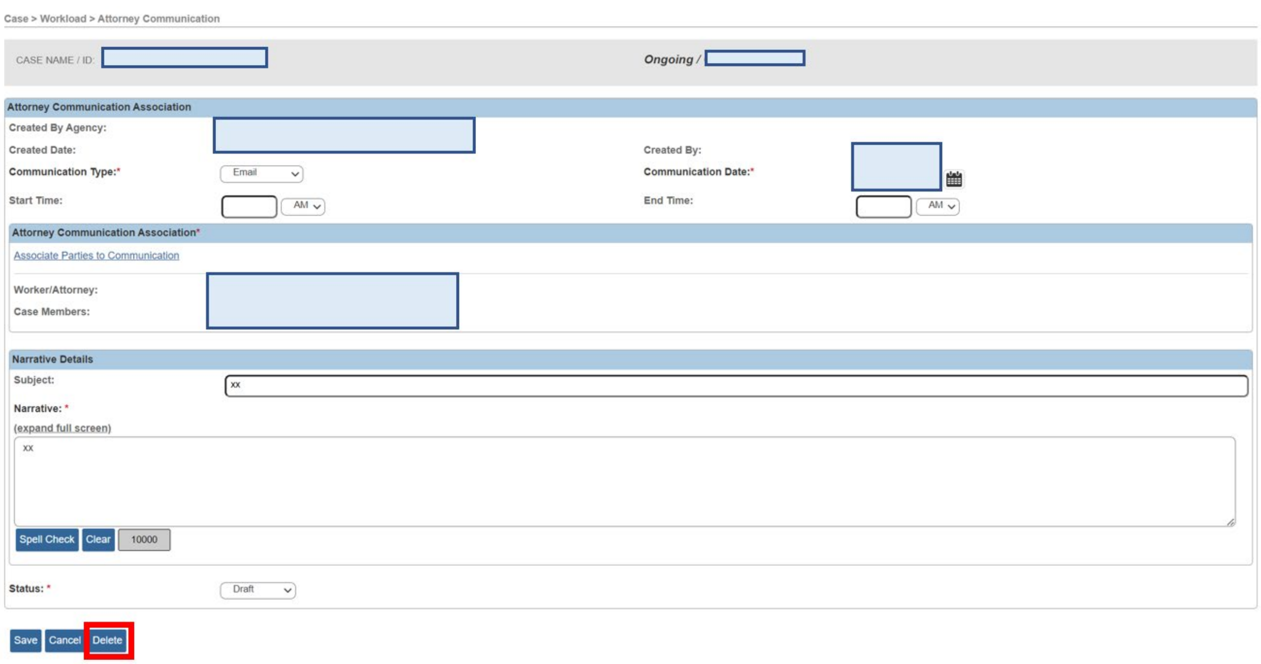
As previously stated, an **Attorney Communication** record can only be deleted when it is in **Draft** status and only by the creator of the record.

1. On the **Attorney Communication** screen, click the **Edit** link in the appropriate row.



The **Attorney Communication Association** screen appears.

2. Click the **Delete** button at the bottom of the screen.



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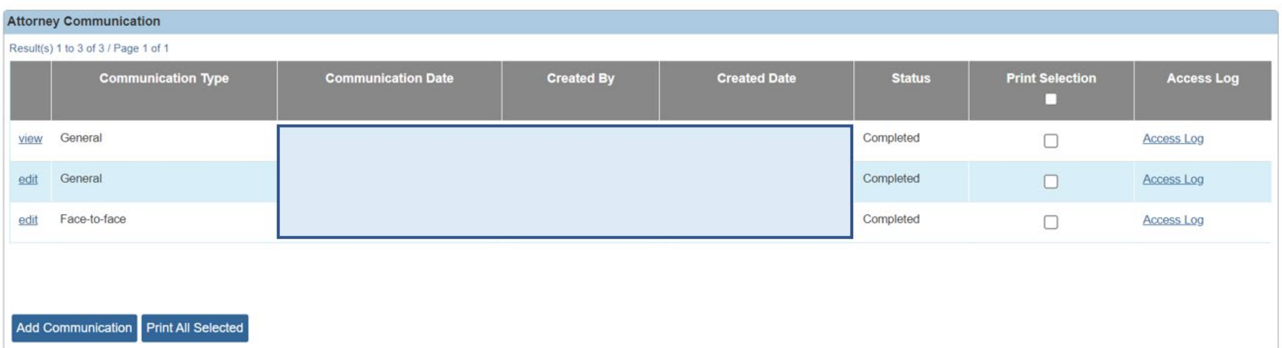
The following message appears:

3. Click the **OK** button.

The record is deleted from the **Attorney Communication** grid.


Attorney Communication

Result(s) 1 to 3 of 3 / Page 1 of 1

	Communication Type	Communication Date	Created By	Created Date	Status	Print Selection	Access Log
view	General				Completed	☐	Access Log
edit	General				Completed	☐	Access Log
edit	Face-to-face				Completed	☐	Access Log

Add Communication | Print All Selected

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