

Adding Attorney Communication Information



Knowledge Base Article

Adding Attorney Communication Information

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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

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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 screenshot displays the Case Management System interface. 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 sidebar menu with 'Attorney Communication' highlighted with a red box. The main content area shows a case record for 'Ongoing' with a 'HAZARD' status. The case details include fields for CASE NAME / ID, ADDRESS, CONTACT, AGENCY (County Department of Job and Family Services), PRIMARY WORKER, and SUPERVISOR(S). Below the case details, there is a 'Case Actions' section with links for View Case Information, Linked Cases, Program Categories, and Case Status History. A yellow warning message states 'Case members have unspecified relationships.' and a 'Hazards' section is visible at the bottom.

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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CASE NAME / ID: Ongoing HAZARD

Attorney Communication Filter Criteria

From Date: To Date:

Communication Type: Status:

Available Created By: Add

Selected Created By: Remove

Sort Results By:

Filter

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

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	<input type="checkbox"/>	Access Log
edit	Email				Draft	<input type="checkbox"/>	Access Log
edit	Face-to-face				Completed	<input type="checkbox"/>	Access Log

[Add Communication](#) [Print All Selected](#)

Recording a New Attorney Communication

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

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	<input type="checkbox"/>	Access Log
edit	Email				Draft	<input type="checkbox"/>	Access Log
edit	Face-to-face				Completed	<input type="checkbox"/>	Access Log

[Add Communication](#) [Print All Selected](#)

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.

Case > Workload > Attorney Communication

CASE NAME / ID: Ongoing /

Attorney Communication Association

Created By Agency:

Created Date:

Communication Type:*

Start Time: AM

Created By:

Communication Date:*

End Time: AM

Attorney Communication Association*

Associate Parties to Communication

Narrative Details

Subject:

Narrative: *
(expand full screen)

Spell Check Clear 10000

Status: *

Save Cancel Delete

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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Case » Workload » Attorney Communication » Associate Parties to Communication

CASE NAME / ID: Ongoing /

Associate Parties to Communication

Worker/Attorney

Name	Participated	Authorized Access
	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

Person Search

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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The screenshot shows a software interface with two main sections. The top section is titled "Case Members" and contains a list of three items, each with a checkbox on the left and a light blue rectangular box on the right. The middle section is titled "Case Associated Persons" and contains a single item with a checkbox on the left and a light blue rectangular box on the right. At the bottom left of the interface, there are two buttons: "OK" (with a red border) and "Cancel".

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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Case > Workload > Attorney Communication

CASE NAME / ID: Ongoing /

Attorney Communication Association

Created By Agency: _____
 Created Date: 05/02/2023 10:19:10 AM Created By: Smith, Kristi
 Communication Type: Communication Date:
 Start Time: AM End Time: AM

Attorney Communication Association*

Associate Parties to Communication

Worker/Attorney:
 Case Members:
 Case Associated Persons:

Narrative Details

Subject:

Narrative: *
 (expand full screen)

Spell Check Clear 10000

Status: *

Save Cancel Delete

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.

Your data has been changed.

CASE NAME / ID: Ongoing **HAZARD**

Attorney Communication Filter Criteria

From Date: To Date:
 Communication Type: Status:
 Available Created By: Selected Created By:

Sort Results By:

Note: The information documented in this section is protected under client/attorney privilege and is not discoverable.

Attorney Communication

Results: 1 to 4 of 4 / Page 1 of 1

	Communication Type	Communication Date	Created By	Created Date	Status	Print Selection	Access Log
view	General	05/02/2023	<input type="text"/>	05/02/2023 9:59 AM	Completed	<input type="checkbox"/>	Access Log
edit	General	05/02/2023	<input type="text"/>	05/02/2023 10:19 AM	Completed	<input type="checkbox"/>	Access Log
edit	Email	05/01/2023	<input type="text"/>	05/02/2023 9:59 AM	Draft	<input type="checkbox"/>	Access Log

Adding Attorney Communication Information

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 screenshot shows the 'Attorney Communication Filter Criteria' interface. At the top, there is a notification: 'Your data has been changed.' Below this, the 'CASE NAME / ID' is 'Ongoing' and a 'HAZARD' indicator is present. The 'Attorney Communication Filter Criteria' section includes fields for 'From Date', 'To Date', 'Communication Type', and 'Status'. Below these are two search boxes: 'Available Created By' and 'Selected Created By'. A 'Sort Results By' dropdown is also visible. A 'Filter' button is located below the search boxes. A note states: 'The information documented in this section is protected under client/attorney privilege and is not discoverable.' The main section is titled 'Attorney Communication' and shows 'Results(s) 1 to 4 of 4 / Page 1 of 1'. The table below has the following data:

	Communication Type	Communication Date	Created By	Created Date	Status	Print Selection	Access Log
view	General	05/02/2023	<input type="text"/>	05/02/2023 9:59 AM	Completed	<input type="checkbox"/>	Access Log
edit	General	05/02/2023	<input type="text"/>	05/02/2023 10:19 AM	Completed	<input type="checkbox"/>	Access Log
edit	Email	05/01/2023	<input type="text"/>	05/02/2023 9:58 AM	Draft	<input type="checkbox"/>	Access Log

The **Attorney Communication Association** screen appears.

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

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Narrative History			
Type	Date Created	Created By	Agency
Original	05/02/2023 10:19 AM		County Department of Job and Family Services

[Insert Correction](#) [View Narrative](#)

Status: * Completed

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.

Correction Details	
New Correction: * (expand full screen)	
<div style="border: 2px solid red; height: 50px;"></div>	
Spell Check	Clear 10000
Existing Narrative: (expand full screen)	
Original Narrative - 05/02/2023 10:19 AM by <input type="text"/> County Department of Job and Family Services	
xx	
<div style="border: 2px solid gold; height: 100px;"></div>	
Apply	Save Cancel

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.

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Type	Date Created	Created By	Agency
Correction 1	05/02/2023 10:41 AM		County Department of Job and Family Services
Original	05/02/2023 10:19 AM		County Department of Job and Family Services

Status: * Completed

Save Cancel Delete

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.

Your data has been changed.

CASE NAME / ID: [] Ongoing HAZARD

Attorney Communication Filter Criteria

From Date: [] To Date: []

Communication Type: [] Status: []

Available Created By: [] Selected Created By: []

Sort Results By: []

Note: The information documented in this section is protected under client/attorney privilege and is not discoverable.

	Communication Type	Communication Date	Created By	Created Date	Status	Print Selection	Access Log
view	General	05/02/2023		05/02/2023 9:59 AM	Completed	<input type="checkbox"/>	Access Log
edit	General	05/02/2023		05/02/2023 10:19 AM	Completed	<input type="checkbox"/>	Access Log
edit	Email	05/01/2023		05/02/2023 9:58 AM	Draft	<input type="checkbox"/>	Access Log

The **Attorney Communication Association** screen appears.

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

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The screenshot shows a table with the following data:

Type	Date Created	Created By	Agency
Correction 1	05/02/2023 10:41 AM	[Redacted]	County Department of Job and Family Services
Original	05/02/2023 10:19 AM	[Redacted]	Gallia County Department of Job and Family Services

Below the table are two buttons: "Insert Correction" and "View Narrative". The "View Narrative" button is highlighted with a red box. Below the buttons, the status is "Completed" and there is a "Save" 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 screenshot shows the "Correction Details" screen. It has two main sections: "New Correction:" and "Existing Narrative:". The "Existing Narrative:" section is highlighted with a red box and contains the following text:

Correction 1 - 05/02/2023 10:41 AM by [Redacted] County Department of Job and Family Services
correction
Original Narrative - 05/02/2023 10:19 AM by [Redacted] County Department of Job and Family Services
xx

At the bottom left of the screen is a "Close" button, which is also highlighted with a red box.

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.

Your data has been changed.

CASE NAME / ID: Ongoing HAZARD

Attorney Communication Filter Criteria

From Date: To Date:

Communication Type: Status:

Available Created By: Add

Selected Created By: Remove

Sort Results By:

Filter

Note: The information documented in this section is protected under client/attorney privilege and is not discoverable.

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Result(s) 1 to 4 of 4 / Page 1 of 1

	Communication Type	Communication Date	Created By	Created Date	Status	Print Selection	Access Log
view	General	05/02/2023	<input type="text"/>	05/02/2023 9:59 AM	Completed	<input type="checkbox"/>	Access Log
edit	General	05/02/2023	<input type="text"/>	05/02/2023 10:19 AM	Completed	<input type="checkbox"/>	Access Log
edit	Email	05/01/2023	<input type="text"/>	05/02/2023 9:58 AM	Draft	<input type="checkbox"/>	Access Log

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.

Case » Workload » Attorney Communication » Access Log

CASE NAME / ID:

Access Log

Employee ID	Name	Date/Time
<input type="text"/>	<input type="text"/>	05/02/2023 10:52:01 AM

Close

The **Attorney Communication** screen appears.

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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.

Attorney Communication

Result(s) 1 to 4 of 4 / Page 1 of 1

	Communication Type	Communication Date	Created By	Created Date	Status	Print Selection	Access Log
view	General				Completed	<input checked="" type="checkbox"/>	Access Log
edit	General				Completed	<input type="checkbox"/>	Access Log
edit	Email				Draft	<input checked="" type="checkbox"/>	Access Log
edit	Face-to-face				Completed	<input checked="" type="checkbox"/>	Access Log

[Add Communication](#) [Print All Selected](#)

The **Document Details** screen appears.

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

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Workload>Reports

Document Details			
Document Category:	<input type="text"/>	Document Title:	Attorney Communication Report
Work-Item ID:	<input type="text"/>	Work-Item Reference:	Attorney Communication Report
Task ID:	<input type="text"/>	Task Reference:	

Document History			
ID	Date Created	Employee ID	Name

Document History

The **Attorney Communication Report** appears.

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

ATTORNEY COMMUNICATION REPORT

Report Date: 05/02/2023

Case Name: Case ID:

Case Status: Open Case Category: Ongoing

Created By: Created Date: 05/02/2023

Created By Agency: Equity Department of Job and Family Services

Communication Status: Completed

Communication Type: General

Communication Date: 05/02/2023

Communication Start Time: 09:05 AM Communication End Time: 09:57 AM

Associated Participants:

Worker/Attorney:

Case Members:

Case Associated Persons:

Subject:

Narrative: xx

Amended Narrative:

Additional Information about the Attorney Communication Report

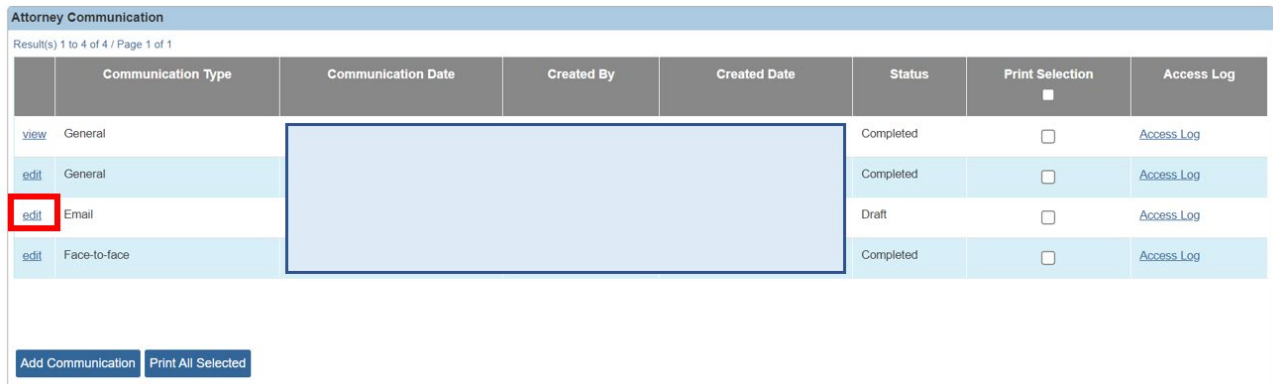
- The **Report Date** only displays on the first page of the report.
- A **Confidential** watermark displays on all of the report pages, regardless of the communication record's status.
- A page break occurs between each communication record printed.
- This report prints by **communication date** and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

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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.

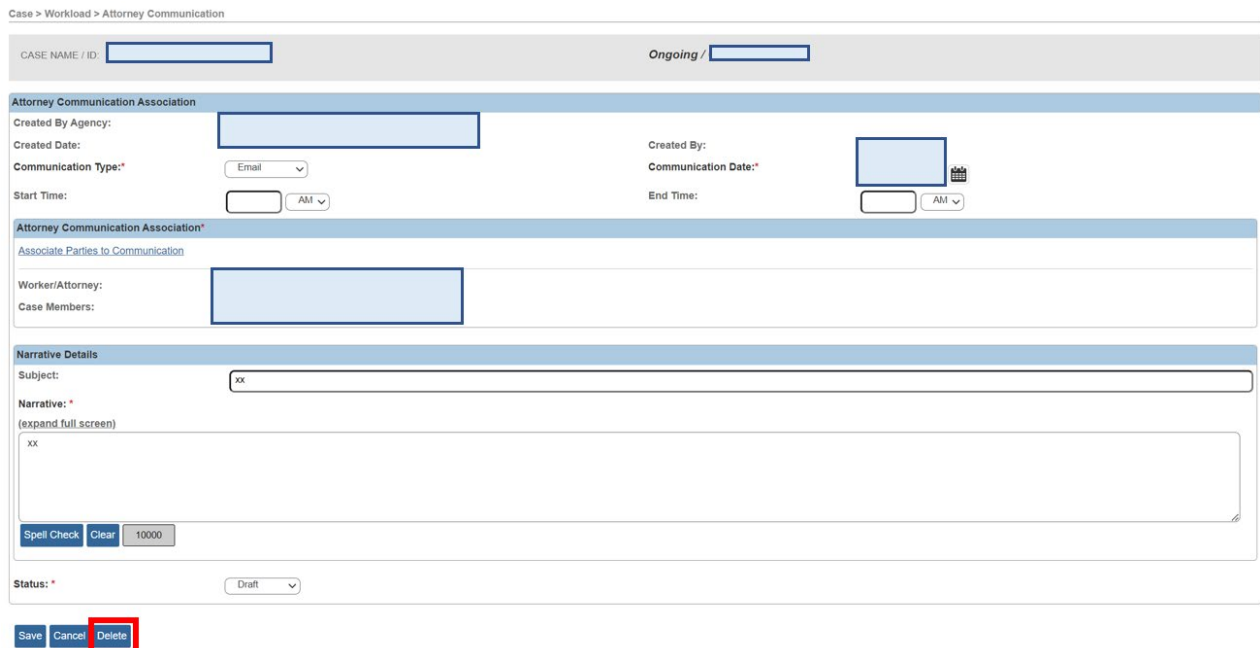


	Communication Type	Communication Date	Created By	Created Date	Status	Print Selection	Access Log
view	General				Completed	<input type="checkbox"/>	Access Log
edit	General				Completed	<input type="checkbox"/>	Access Log
edit	Email				Draft	<input type="checkbox"/>	Access Log
edit	Face-to-face				Completed	<input type="checkbox"/>	Access Log

[Add Communication](#) [Print All Selected](#)

The **Attorney Communication Association** screen appears.

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



Case > Workload > Attorney Communication

CASE NAME / ID: Ongoing /

Attorney Communication Association

Created By Agency:
Created Date:
Communication Type:
Start Time: AM
Created By:
Communication Date:
End Time: AM

Attorney Communication Association*

Associate Parties to Communication

Worker/Attorney:
Case Members:

Narrative Details

Subject:
Narrative:
(expand full screen)

[Spell Check](#) [Clear](#) 10000

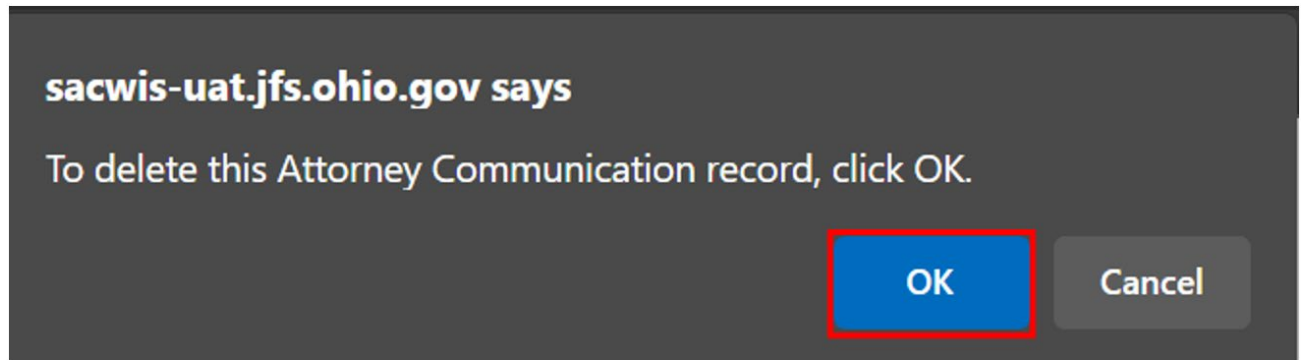
Status:

[Save](#) [Cancel](#) [Delete](#)

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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	<input type="checkbox"/>	Access Log
edit	General				Completed	<input type="checkbox"/>	Access Log
edit	Face-to-face				Completed	<input type="checkbox"/>	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.