Recording a Family Team Meeting

Ohio SACWIS

Knowledge Base Article

Table of Contents

Recording a Family Team Meeting

Overview

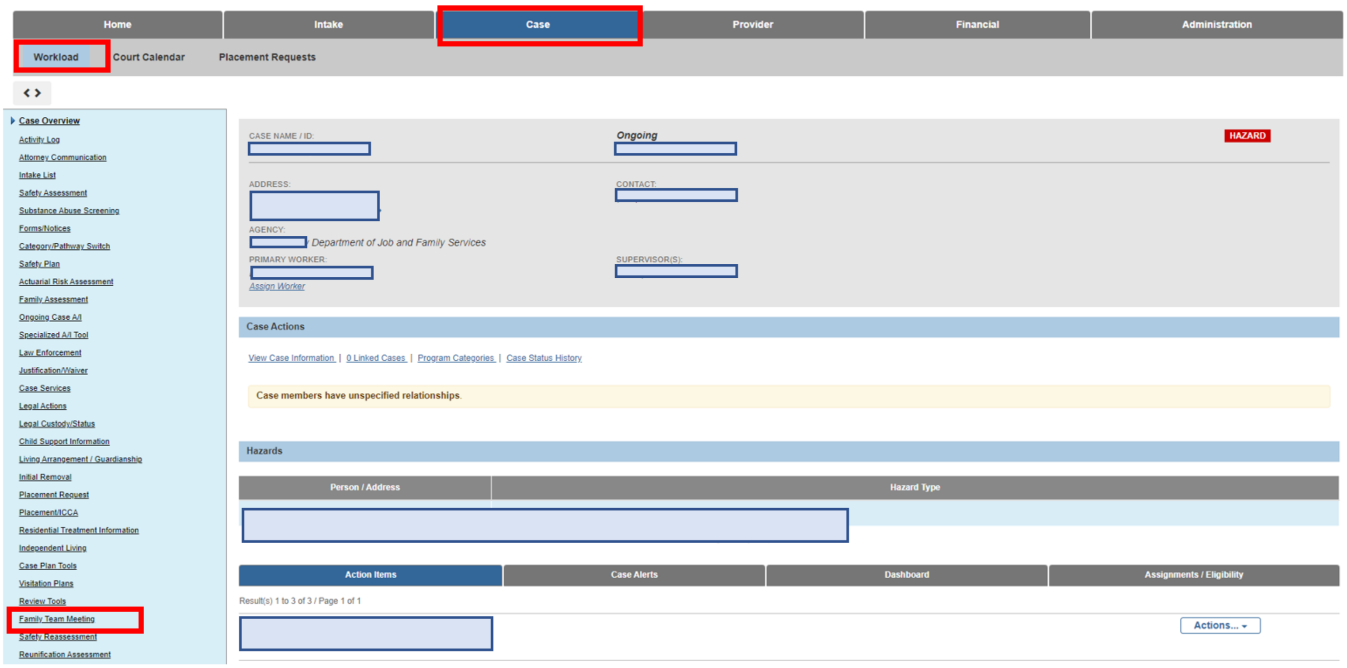
The **Family Team Meeting (FTM)** is Ohio SACWIS functionality added to help support the Protect Ohio Evaluation and document vital information gathered during these meetings.

Security

Important: You must be assigned to the case or assigned with the **FTM Facilitator** User Group to have the **Add Family Team Meeting** button enabled.

Navigating to the Family Team Meeting Screen

1. On the Ohio SACWIS **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case ID** link of the appropriate case. The **Case Overview** screen appears.
4. Click the **Family Team Meeting** link in the **Navigation** menu.



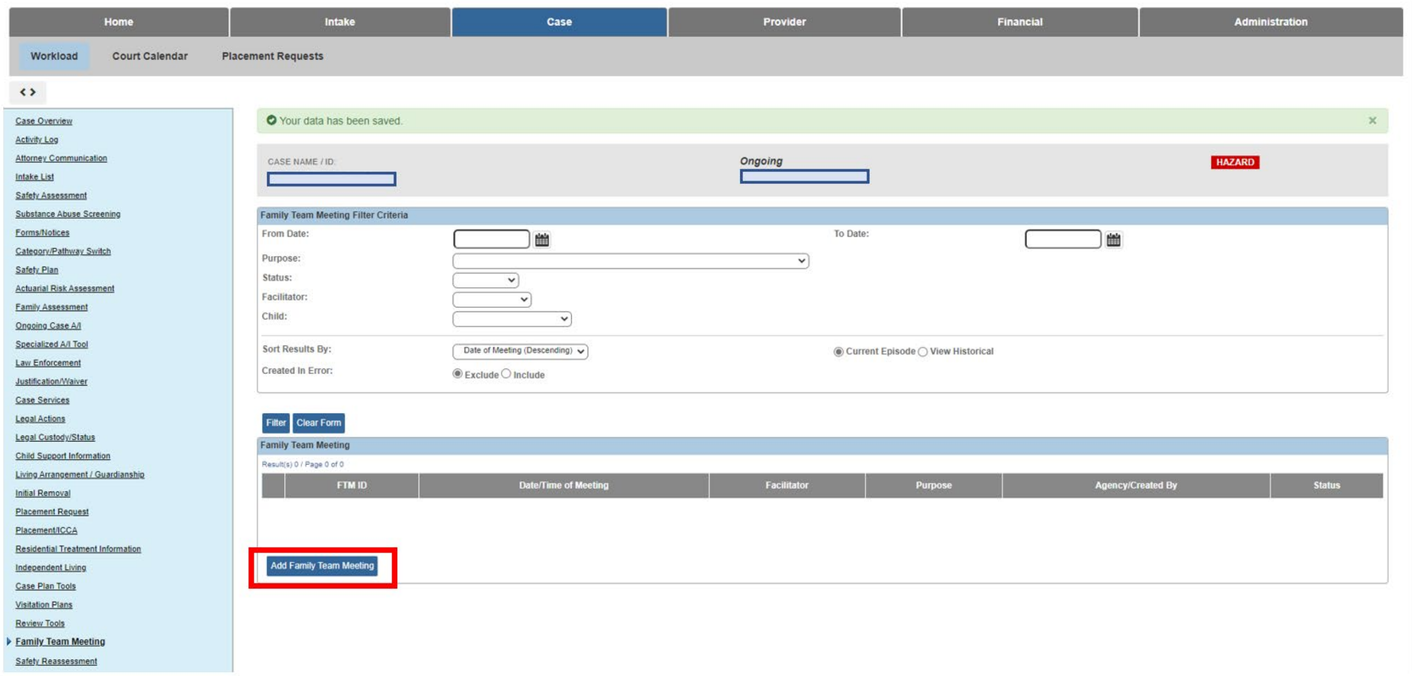
The **Family Team Meeting Filter Criteria** screen appears displaying the **Family Team Meeting** section below it.

Adding a New Family Team Meeting

Reminder: If the **Add Family Team Meeting** button is grayed out, you are either not assigned to the case or have not been assigned to the **FTM Facilitator** user group, so you will not be able to add a Family Team Meeting.

Recording a Family Team Meeting

1. Click the **Add Family Team Meeting** button.



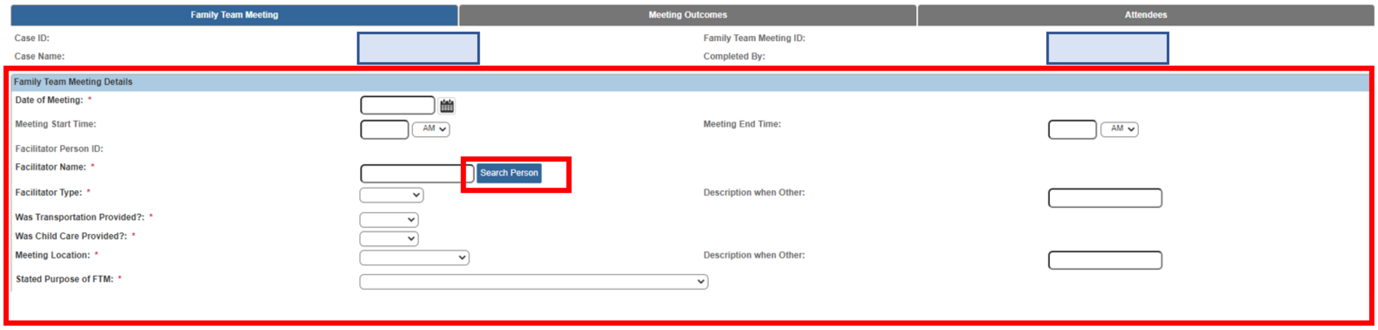
The **Family Team Meeting Details** screen appears.

2. On **Family Team Meeting** tab, complete the required fields.

Important:

- If information is required, a red asterisk (*) displays next to the field.
- The **Initial Status** field at the bottom of this screen defaults to **Draft**. The field will stay in **Draft** status until later in this process.
- Once the status is changed to **Completed**, the information can no longer be edited.

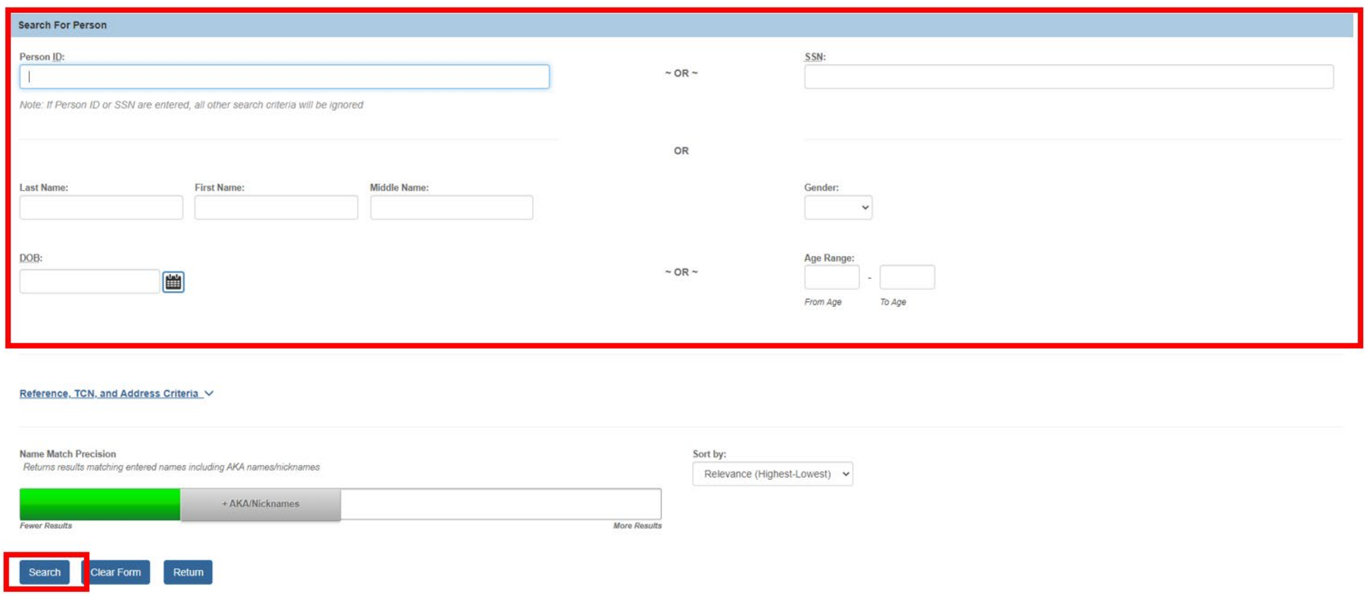
3. In the **Facilitator Name** field, click the **Search Person** button.
   - You must complete a person search to locate the facilitator's name.
   - It is highly recommended that each agency keep a list of the facilitator's person ID, as well as the person ID for each employee who will attend the FTM, so that all person IDs used remain consistent.



The **Person Search Criteria** screen appears.

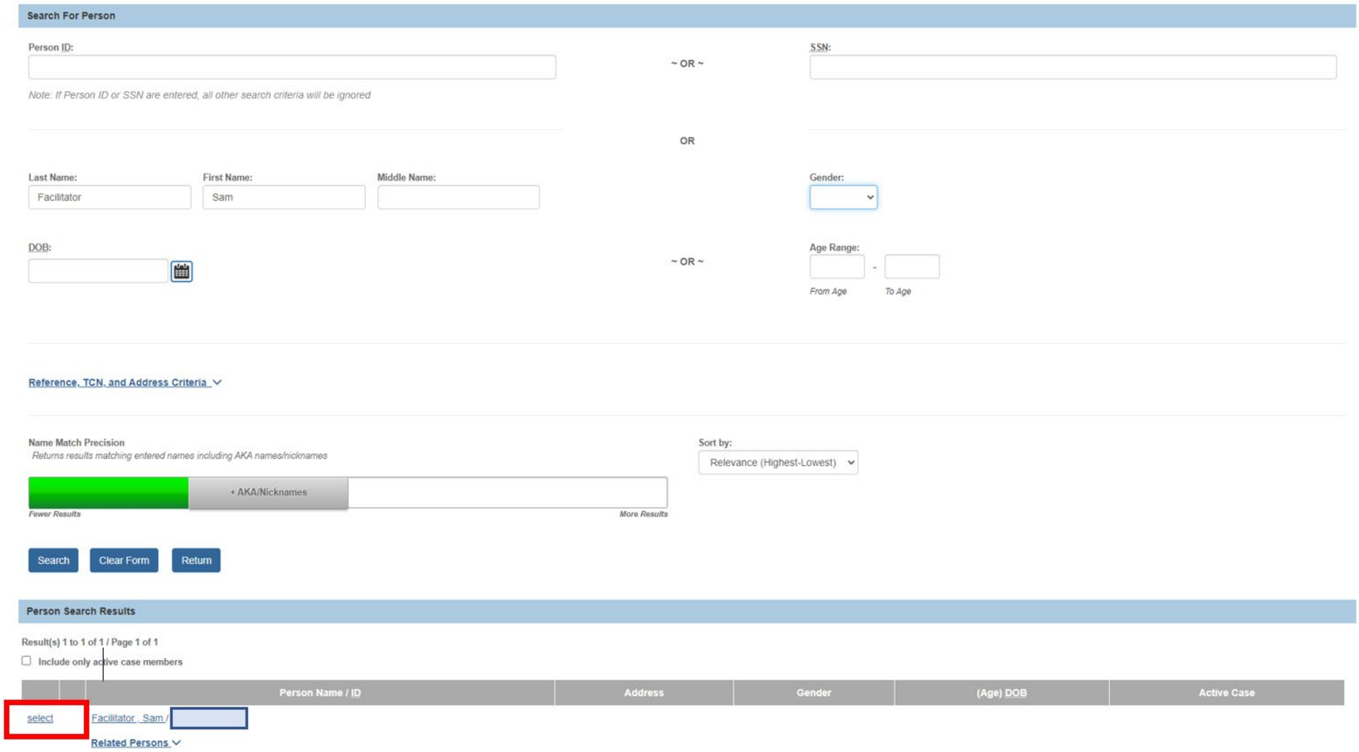
Enter the appropriate search information into the fields.

4. Click the **Search** button.



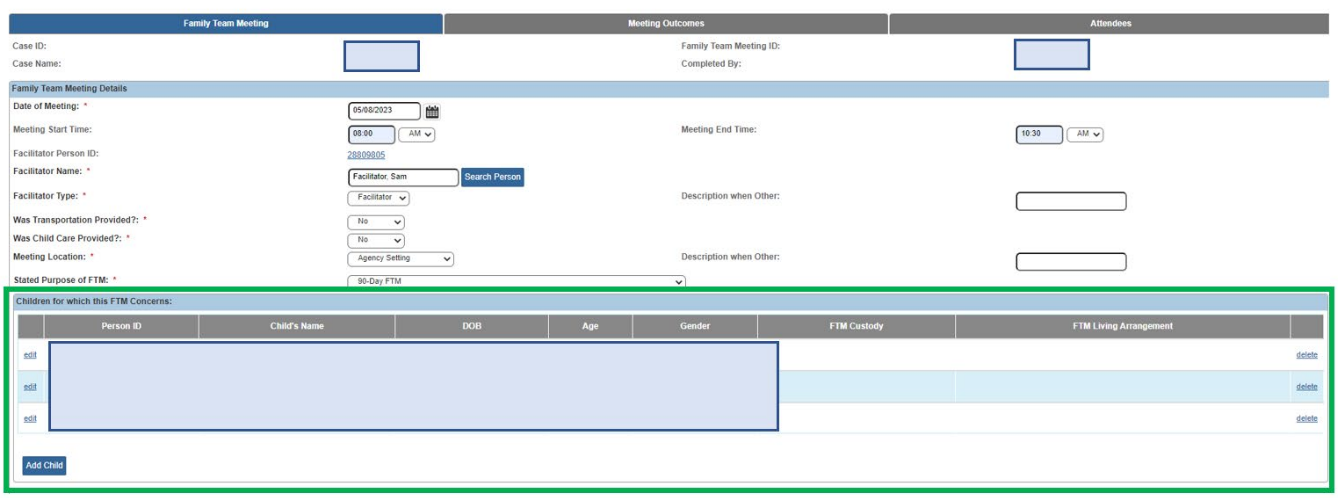
The results appear in the **Person Search Results** grid.

5. Click the **Select** link in the appropriate row.



The selected name populates in the **Facilitator Name** field.

As shown in green, if a family assessment was previously completed, the children's information from the most recent family assessment automatically appears in the **Children for which this FTM Concerns** section.



If no children auto-populate, this is what the screen looks like:

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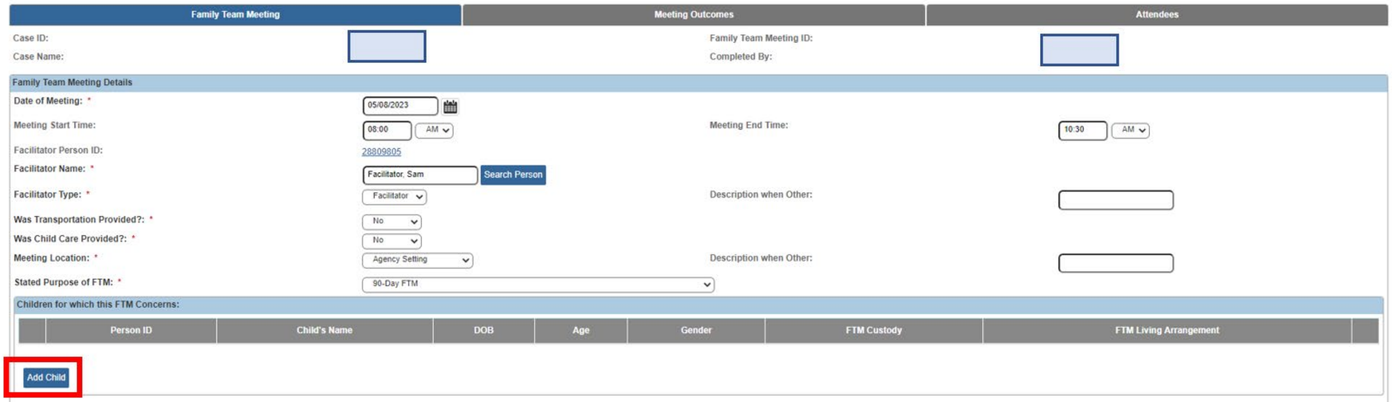
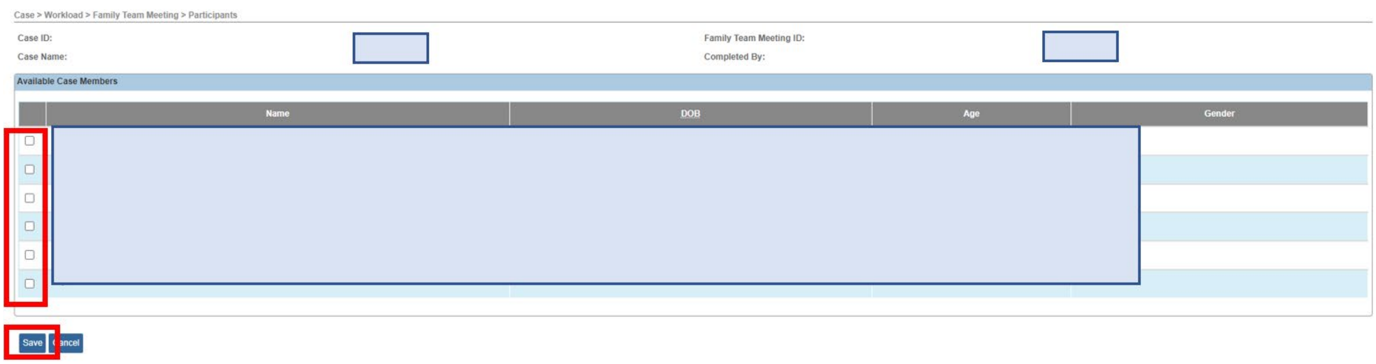
6. In either case, to add a child, click the **Add Child** button.



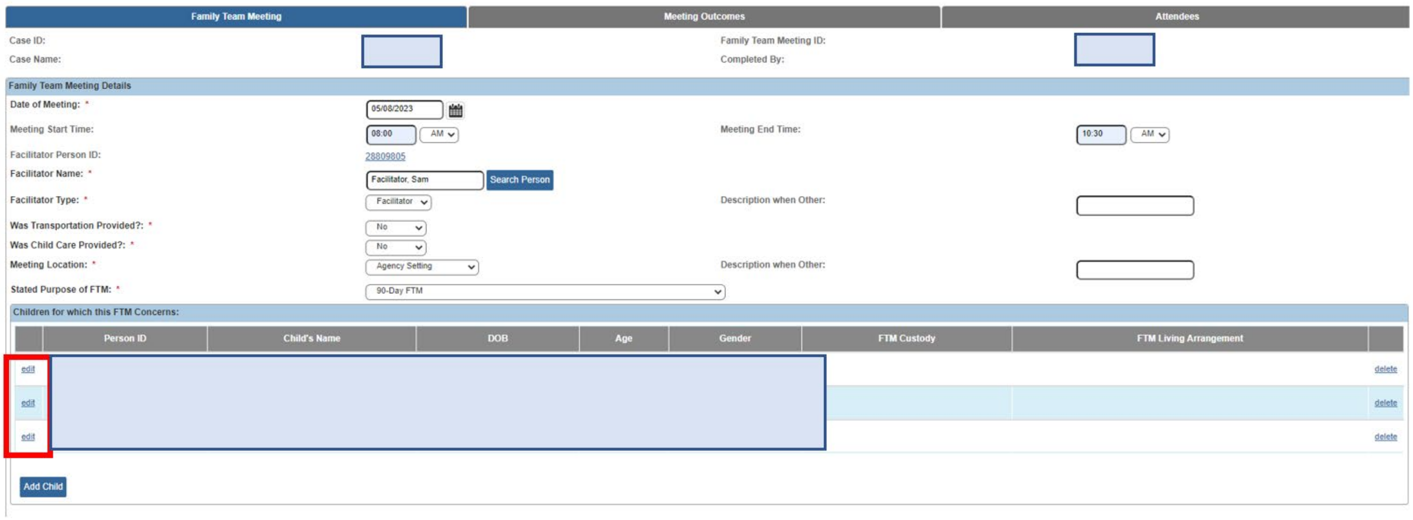
The **Available Case Members** screen appears displaying all case members.

7. Click the check box next to the appropriate case member(s).
8. Click the **Save** button.



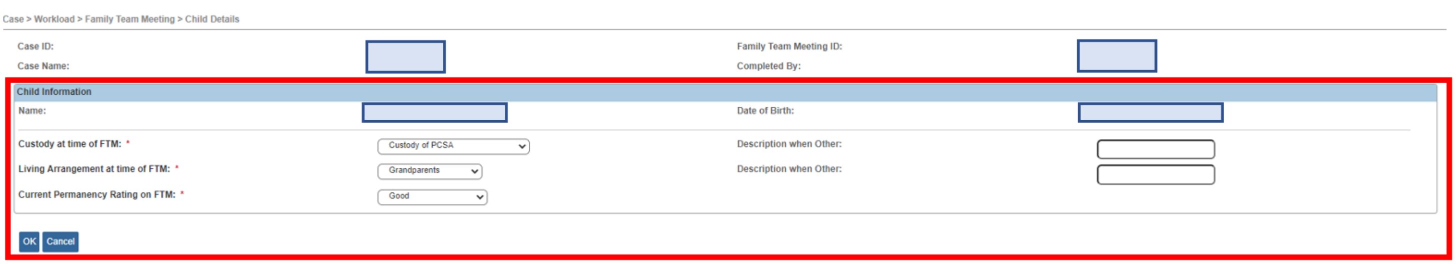
The **Family Team Meeting Details** screen appears displaying the selected names in the **Children for which this FTM Concerns** section.

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



The **Child Information** screen appears.

10. In the **Custody at time of FTM** field, select the appropriate choice from the drop-down list.
11. In the **Living Arrangement at time of FTM** field, select the appropriate choice from the drop-down list.
12. If the Stated Purpose of the FTM selected on the Family Team Meeting tab is one of the Permanency Roundtable options, the **Current Permanency Rating on FTM** field will also appear, select the appropriate choice from the drop-down list.
13. When complete, click the **OK** button.

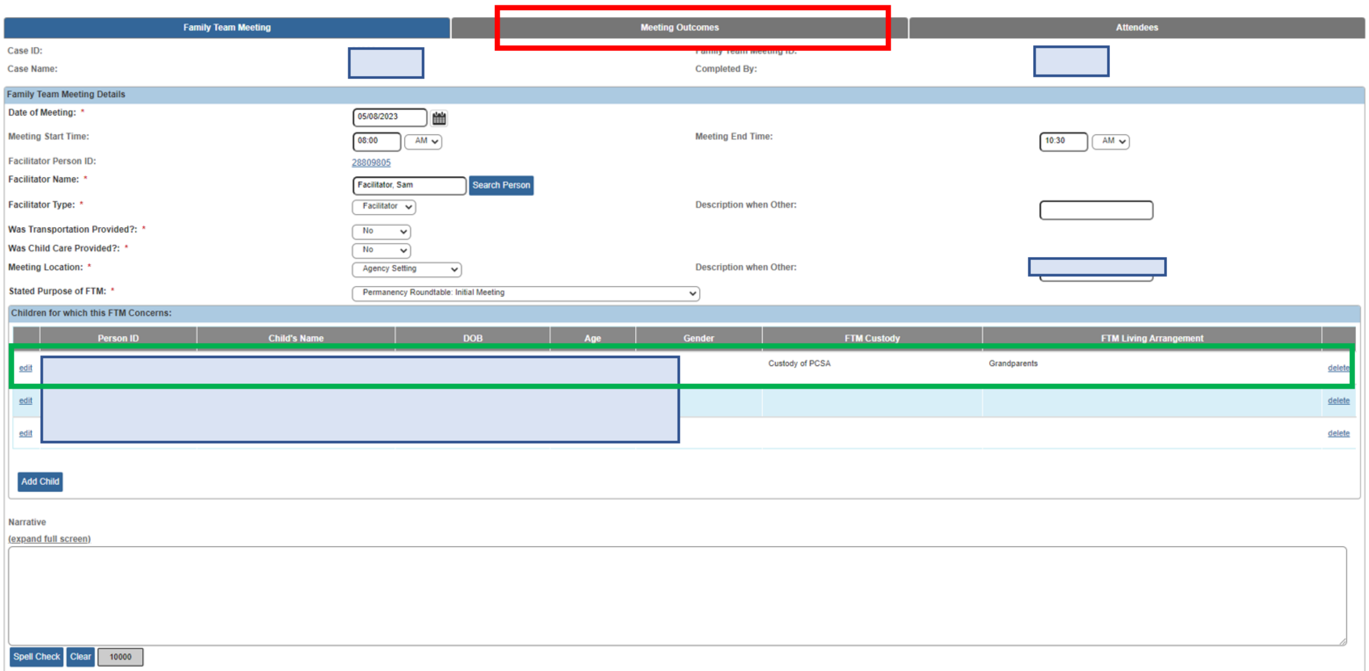


As shown in green below, the **Family Team Meeting Details** screen appears displaying the selected information in the grid.

Recording Meeting Outcomes

1. Click the **Meeting Outcomes** tab.

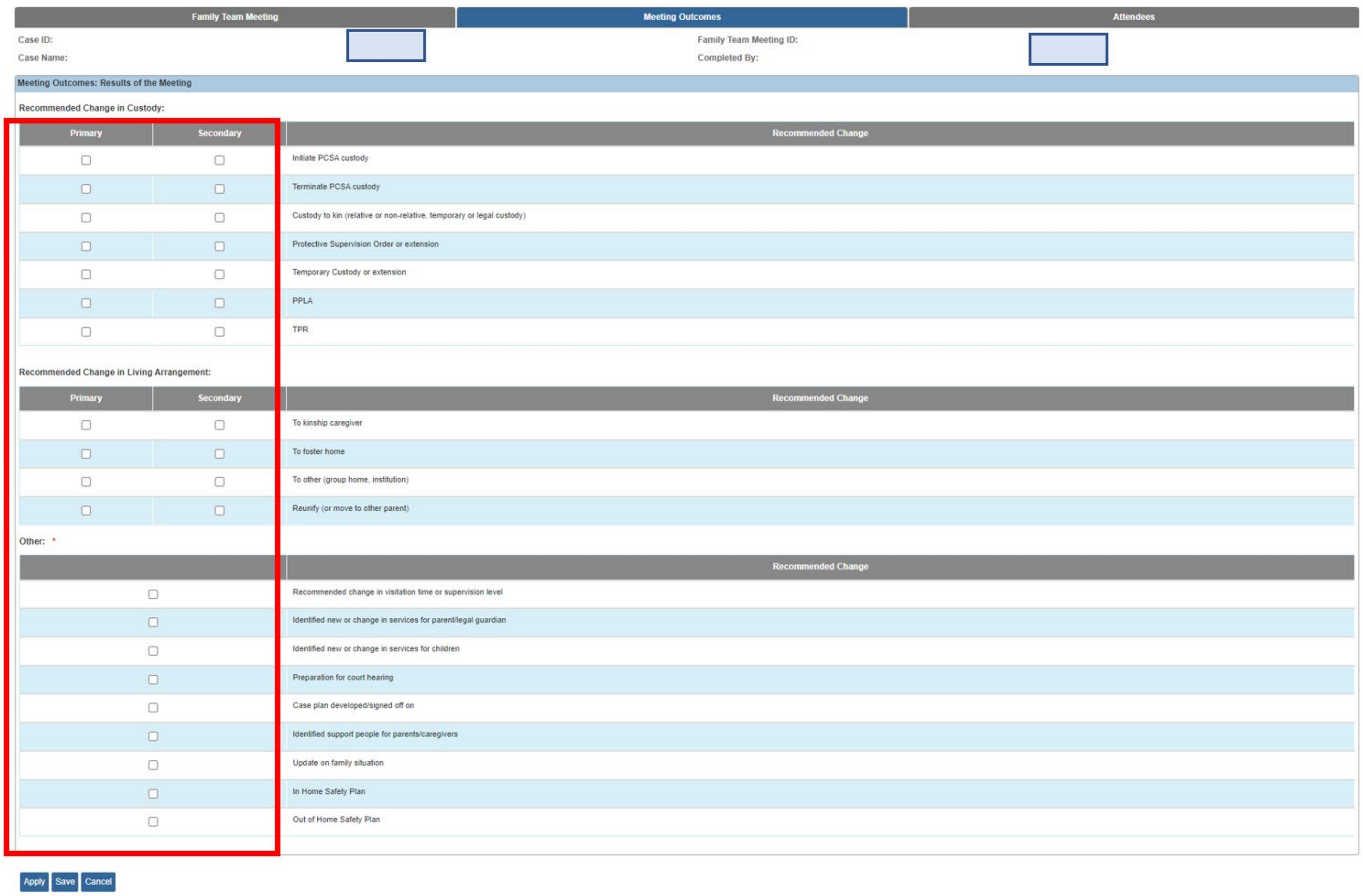
Recording a Family Team Meeting



The **Meeting Outcomes: Results of the Meeting** screen appears.

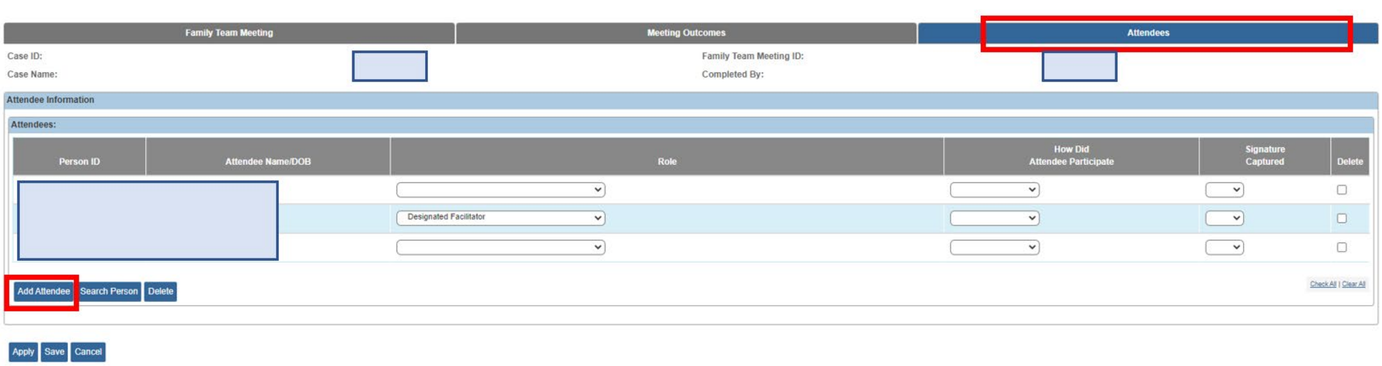
2. Select at least one check box on the screen.
    - In the **Recommended Change in Custody** or **Recommended Change in Living Arrangement** sections, if you select a change from the **Secondary** column, you must select a change in the **Primary** column as well.
    - Only one **Primary** value per section can be selected, but multiple **Secondary** choices can be made.

Recording a Family Team Meeting



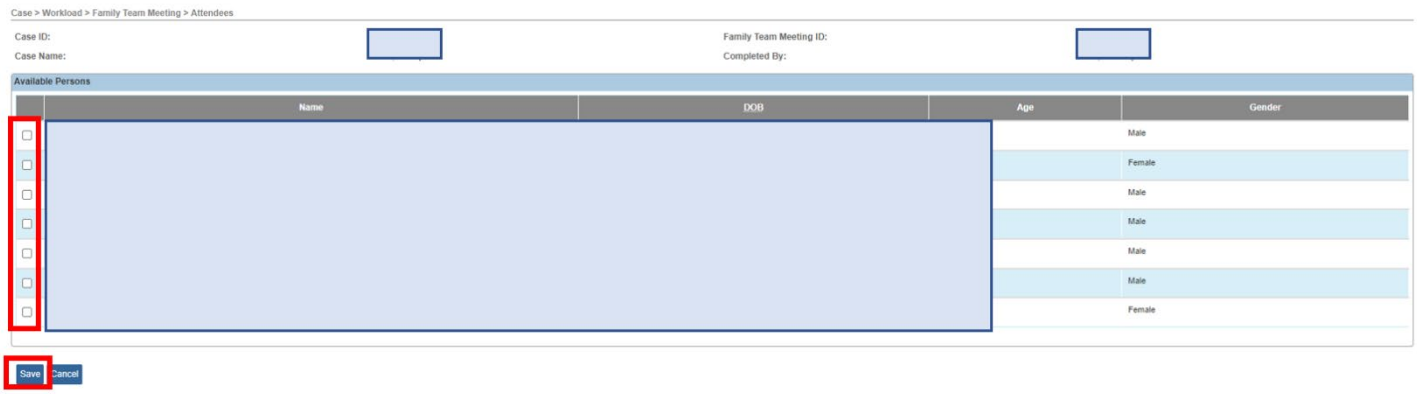
Recording Meeting Attendees

1. Click the **Attendees** tab. The **Attendee Information** screen appears.
2. Click the **Add Attendee** button.



The **Available Case Members and Case Associated Persons** screen appears.

3. Click the check box(es) of the case participants and associated person(s) who attended the Family Team Meeting.
4. Click the **Save** button.

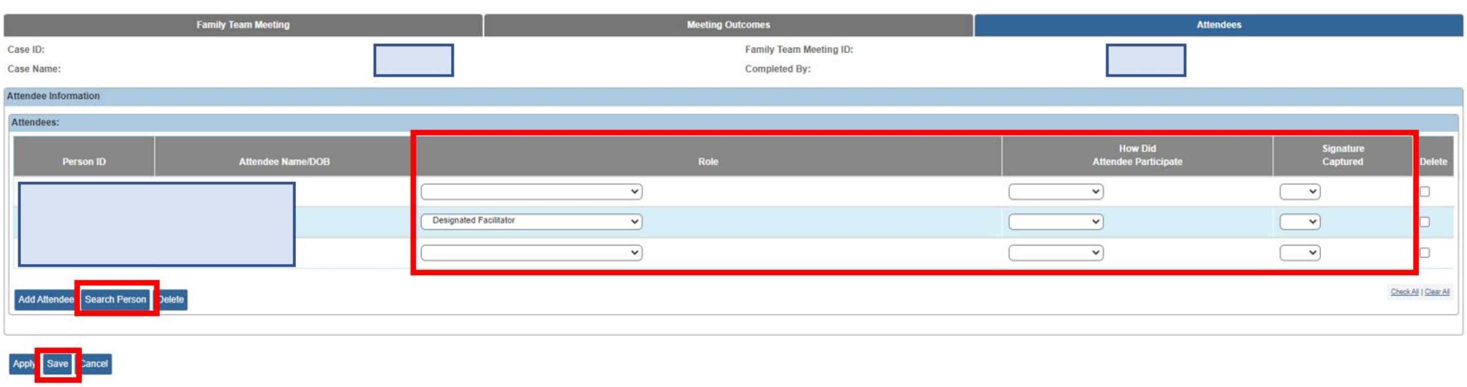


The **Attendee Information** screen appears displaying the selected participants.

5. To locate additional attendees, click the **Search Person** button (shown on the next page). The **Person Search Criteria** screen appears.
6. Use the **Person Search Criteria** screen fields to locate the person.
7. When located, click the **Select** link. The person appears in the **Attendees** grid as shown below.

In the **Role** field, select the appropriate role.

8. In the **How did the Attendee Participate** field, select the appropriate role.
9. In the **Signature Captured** field, select **Yes** or **No**.
10. Repeat the previous three steps for each attendee.
11. When complete, click the **Save** button.

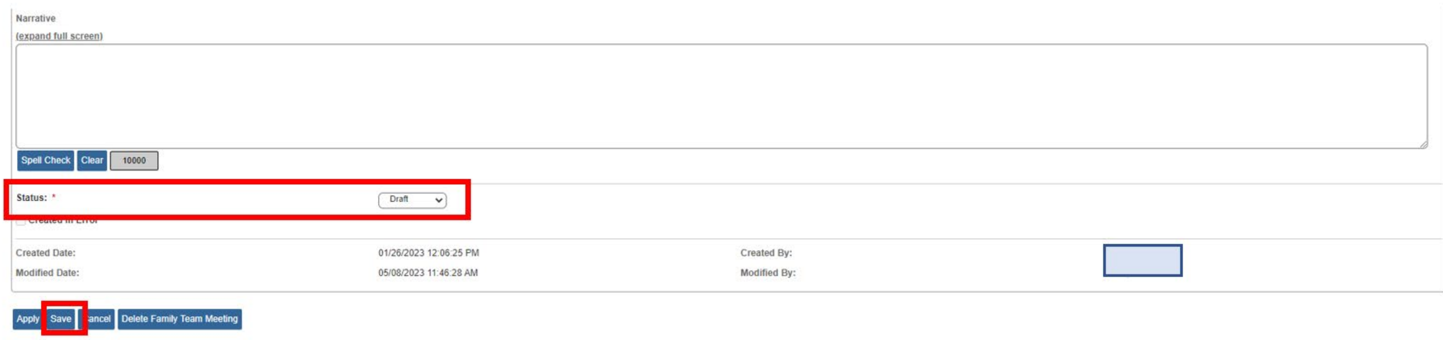


The **Family Team Meeting Filter Criteria** screen appears.

Changing the FTM Status to Completed

To complete the FTM and change the status, complete the following steps:

1. Navigate to the **Family Team Meeting** tab (**Family Team Meeting Filter Criteria** screen) using the previous steps.
2. In the **Status** field at the bottom of the screen, select **Completed** from the drop-down list.
3. Click the **Save** button.



The **Family Team Meeting** screen appears displaying the saved information.

4. When logging the next FTM for this family, select the **Copy** link to duplicate the previously completed FTM.

Note: All active children identified in the first FTM will be copied, as well as all attendees, so this will save time from completing person searches again.

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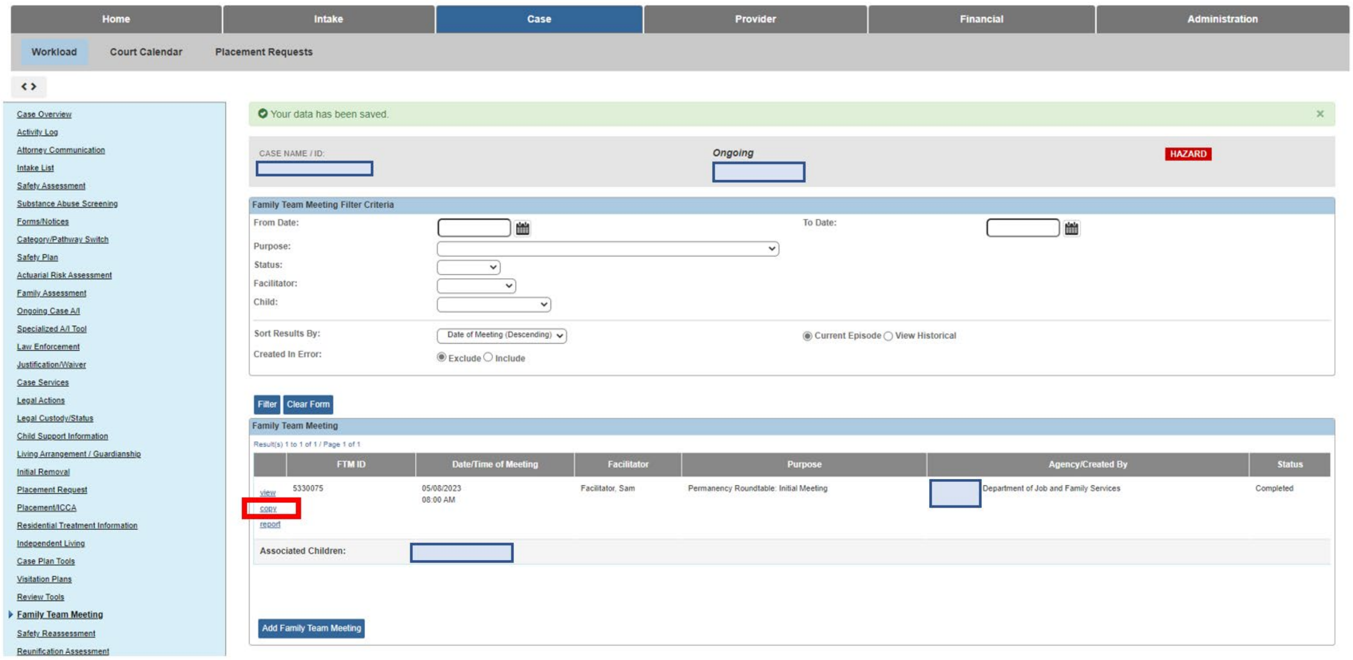

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at SACWIS_HELP_DESK@jfs.ohio.gov .