

# **Recording a Family Team Meeting**



**Knowledge Base Article**

# Recording a Family Team Meeting

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# 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 screenshot displays the Ohio SACWIS Case Overview interface. The top navigation bar includes tabs for Home, Intake, Case, Provider, Financial, and Administration. The 'Case' tab is active. Below the navigation bar, there are sub-tabs for Workload, Court Calendar, and Placement Requests. The left-hand navigation menu lists various case management functions, with 'Family Team Meeting' highlighted. The main content area shows the details for a case named 'Ongoing', which is marked as 'HAZARD'. Fields include Case Name / ID, Address, Contact, Agency (Department of Job and Family Services), Primary Worker, and Supervisor(s). A 'Case Actions' section contains a warning: 'Case members have unspecified relationships.' Below this is a 'Hazards' table with columns for Person / Address and Hazard Type. At the bottom, there are sections for Action Items, Case Alerts, Dashboard, and Assignments / Eligibility. The page shows 'Result(s) 1 to 3 of 3 / Page 1 of 1' and an 'Actions...' button.

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.

# Recording a Family Team Meeting

The screenshot shows a web form for recording a family team meeting. At the top, there are three tabs: 'Family Team Meeting', 'Meeting Outcomes', and 'Attendees'. Below the tabs, there are fields for 'Case ID', 'Case Name', 'Family Team Meeting ID', and 'Completed By'. The main section, 'Family Team Meeting Details', is highlighted with a red border. It contains several fields: 'Date of Meeting' (calendar icon), 'Meeting Start Time' (time picker), 'Meeting End Time' (time picker), 'Facilitator Person ID', 'Facilitator Name' (with a 'Search Person' button highlighted in red), 'Facilitator Type' (dropdown), 'Was Transportation Provided?' (checkbox), 'Was Child Care Provided?' (checkbox), 'Meeting Location' (dropdown), and 'Stated Purpose of FTM' (text area). There are also two 'Description when Other' text areas.

The **Person Search Criteria** screen appears.

Enter the appropriate search information into the fields.

4. Click the **Search** button.

The screenshot shows the 'Search For Person' form. It has a blue header. The form includes several search criteria: 'Person ID' (text input), 'SSN' (text input), 'Last Name' (text input), 'First Name' (text input), 'Middle Name' (text input), 'Gender' (dropdown), 'DOB' (calendar icon), and 'Age Range' (two text inputs for 'From Age' and 'To Age'). There are 'OR' separators between the criteria. A note states: 'Note: If Person ID or SSN are entered, all other search criteria will be ignored.' At the bottom, there are three buttons: 'Search' (highlighted with a red box), 'Clear Form', and 'Return'.

[Reference TCN and Address Criteria](#) ▾

Name Match Precision

Returns results matching entered names including AKA names/nicknames

Sort by:

Relevance (Highest-Lowest) ▾

Fewer Results + AKA/Nicknames - More Results

[Search](#) [Clear Form](#) [Return](#)

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

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

# Recording a Family Team Meeting

**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:

Facilitator  Sam

Gender:

DOB:

~ OR ~ Age Range:  -

From Age To Age

**Reference, TCN, and Address Criteria**

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

Sort by: Relevance (Highest-Lowest)

+ AKA/Nicknames

Fewer Results More Results

**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
<input type="button" value="select"/>	Facilitator_Sam/ <input type="text"/>				

[Related Persons](#)

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.

Family Team Meeting	Meeting Outcomes	Attendees				
Case ID: <input type="text"/>	Family Team Meeting ID: <input type="text"/>	Completed By: <input type="text"/>				
Case Name: <input type="text"/>						
<b>Family Team Meeting Details</b>						
Date of Meeting: * <input type="text"/>	Meeting Start Time: <input type="text"/>	Meeting End Time: <input type="text"/>				
Facilitator Person ID: <input type="text"/>	Facilitator Name: <input type="text"/>	Facilitator Type: <input type="text"/>				
Was Transportation Provided?: * <input type="text"/>	Was Child Care Provided?: * <input type="text"/>	Meeting Location: * <input type="text"/>				
Stated Purpose of FTM: * <input type="text"/>						
<b>Children for which this FTM Concerns:</b>						
Person ID	Child's Name	DOB	Age	Gender	FTM Custody	FTM Living Arrangement
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Add Child"/>						

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

# Recording a Family Team Meeting

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

The screenshot shows the 'Family Team Meeting' form with several sections: 'Family Team Meeting' (Case ID, Case Name), 'Meeting Outcomes' (Family Team Meeting ID, Completed By), and 'Attendees'. The 'Family Team Meeting Details' section includes fields for Date of Meeting (05/08/2023), Meeting Start Time (08:00 AM), Meeting End Time (10:30 AM), Facilitator Person ID (28809925), Facilitator Name (Facilitator, Sam), Facilitator Type (Facilitator), Was Transportation Provided? (No), Was Child Care Provided? (No), Meeting Location (Agency Setting), and Stated Purpose of FTM (90-Day FTM). Below these fields is a table titled 'Children for which this FTM Concerns:' with columns for Person ID, Child's Name, DOB, Age, Gender, FTM Custody, and FTM Living Arrangement. A red box highlights the 'Add Child' button at the bottom left of the table.

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 screenshot shows the 'Available Case Members' screen with a table of case members. The table has columns for Name, DOB, Age, and Gender. A red box highlights the checkboxes in the first column of the table. Below the table, a red box highlights 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.

# Recording a Family Team Meeting

The screenshot shows a web form with three main tabs: "Family Team Meeting", "Meeting Outcomes", and "Attendees". The "Family Team Meeting" tab is active. Fields include Case ID, Case Name, Family Team Meeting ID, and Completed By. The "Family Team Meeting Details" section contains fields for Date of Meeting (05/08/2023), Meeting Start Time (08:00 AM), Meeting End Time (10:30 AM), Facilitator Person ID (20000005), Facilitator Name (Facilitator, Sam), Facilitator Type (Facilitator), Was Transportation Provided? (No), Was Child Care Provided? (No), Meeting Location (Agency Setting), and Stated Purpose of FTM (90-Day FTM). Below this is a table titled "Children for which this FTM Concerns:" with columns for Person ID, Child's Name, DOB, Age, Gender, FTM Custody, and FTM Living Arrangement. Three rows are visible, each with an "edit" link on the left and a "delete" link on the right. An "Add Child" button is at the bottom left.

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.

The screenshot shows a modal form titled "Child Information" with a red border. It contains fields for Name, Date of Birth, Custody at time of FTM (Custody of PCSA), Living Arrangement at time of FTM (Grandparents), and Current Permanency Rating on FTM (Good). There are also two "Description when Other:" text boxes. At the bottom left are "OK" and "Cancel" buttons.

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 screenshot shows a web application for recording family team meetings. At the top, there are three tabs: 'Family Team Meeting', 'Meeting Outcomes' (highlighted with a red box), and 'Attendees'. Below the tabs are input fields for 'Case ID' and 'Case Name'. The 'Meeting Outcomes' section contains a form with the following fields:

- Date of Meeting: 05-08-2023
- Meeting Start Time: 08:00 AM
- Meeting End Time: 10:30 AM
- Facilitator Person ID: 28809805
- Facilitator Name: Facilitator Sam (with a 'Search Person' button)
- Facilitator Type: Facilitator
- Was Transportation Provided?: No
- Was Child Care Provided?: No
- Meeting Location: Agency Setting
- Stated Purpose of FTM: Permanency Roundtable: Initial Meeting

Below the form is a table titled 'Children for which this FTM Concerns:'. The table has the following columns: Person ID, Child's Name, DOB, Age, Gender, FTM Custody, and FTM Living Arrangement. The first row shows 'Custody of PCSA' and 'Grandparents'. There are three rows in total, with the first two being highlighted in green. Below the table is an 'Add Child' button.

At the bottom of the form is a 'Narrative' text area with a '(expand full screen)' link and a 'Spell Check' button with a 'Clear' button and a '10000' character count.

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

Family Team Meeting		Meeting Outcomes	Attendees
Case ID:	<input type="text"/>	Family Team Meeting ID:	<input type="text"/>
Case Name:	<input type="text"/>	Completed By:	<input type="text"/>
<b>Meeting Outcomes: Results of the Meeting</b>			
<b>Recommended Change in Custody:</b>			
Primary	Secondary	Recommended Change	
<input type="checkbox"/>	<input type="checkbox"/>	Initiate PCSA custody	
<input type="checkbox"/>	<input type="checkbox"/>	Terminate PCSA custody	
<input type="checkbox"/>	<input type="checkbox"/>	Custody to kin (relative or non-relative, temporary or legal custody)	
<input type="checkbox"/>	<input type="checkbox"/>	Protective Supervision Order or extension	
<input type="checkbox"/>	<input type="checkbox"/>	Temporary Custody or extension	
<input type="checkbox"/>	<input type="checkbox"/>	PPLA	
<input type="checkbox"/>	<input type="checkbox"/>	TPR	
<b>Recommended Change in Living Arrangement:</b>			
Primary	Secondary	Recommended Change	
<input type="checkbox"/>	<input type="checkbox"/>	To kinship caregiver	
<input type="checkbox"/>	<input type="checkbox"/>	To foster home	
<input type="checkbox"/>	<input type="checkbox"/>	To other (group home, institution)	
<input type="checkbox"/>	<input type="checkbox"/>	Reunify (or move to other parent)	
<b>Other:</b>			
		Recommended Change	
<input type="checkbox"/>		Recommended change in visitation time or supervision level	
<input type="checkbox"/>		Identified new or change in services for parent/legal guardian	
<input type="checkbox"/>		Identified new or change in services for children	
<input type="checkbox"/>		Preparation for court hearing	
<input type="checkbox"/>		Case plan developed/signed off on	
<input type="checkbox"/>		Identified support people for parents/caregivers	
<input type="checkbox"/>		Update on family situation	
<input type="checkbox"/>		In Home Safety Plan	
<input type="checkbox"/>		Out of Home Safety Plan	

Apply Save Cancel

## Recording Meeting Attendees

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

Family Team Meeting		Meeting Outcomes	Attendees		
Case ID:	<input type="text"/>	Family Team Meeting ID:	<input type="text"/>		
Case Name:	<input type="text"/>	Completed By:	<input type="text"/>		
<b>Attendee Information</b>					
<b>Attendees:</b>					
Person ID	Attendee Name/DOB	Role	How Did Attendee Participate	Signature Captured	Delete
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
		Designated Facilitator			<input type="checkbox"/>
					<input type="checkbox"/>

Add Attendee Search Person Delete Check All Clear All

Apply Save Cancel

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

## Recording a Family Team Meeting

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.

Case > Workload > Family Team Meeting > Attendees

Case ID:  Family Team Meeting ID:

Case Name:  Completed By:

Available Persons						
	Name	DOB	Age		Gender	
<input type="checkbox"/>					Male	
<input type="checkbox"/>					Female	
<input type="checkbox"/>					Male	
<input type="checkbox"/>					Male	
<input type="checkbox"/>					Male	
<input type="checkbox"/>					Male	
<input type="checkbox"/>					Female	

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.

Family Team Meeting Meeting Outcomes Attendees

Case ID:  Family Team Meeting ID:

Case Name:  Completed By:

Attendee Information						
Attendees:						
Person ID	Attendee Name/DOB	Role	How Did Attendee Participate	Signature Captured		Delete
		<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="checkbox"/>
		Designated Facilitator	<input type="text"/>	<input type="text"/>		<input type="checkbox"/>
		<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="checkbox"/>

# Recording a Family Team Meeting

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 screenshot shows a web form for recording a Family Team Meeting. At the top, there is a 'Narrative' section with a text area and a '(expand full screen)' link. Below this are 'Spell Check' and 'Clear' buttons, and a character count of '10000'. The 'Status' field is a dropdown menu currently set to 'Draft', which is highlighted with a red box. Below the status field, there are fields for 'Created Date' (01/26/2023 12:06:25 PM) and 'Modified Date' (05/08/2023 11:46:29 AM), along with 'Created By' and 'Modified By' fields. At the bottom, there are buttons for 'Apply', 'Save' (highlighted with a red box), 'Cancel', and 'Delete Family Team Meeting'.

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.

# Recording a Family Team Meeting

Home Intake **Case** Provider Financial Administration

Workload Court Calendar Placement Requests

< >

Case Overview  
 Activity Log  
 Attorney Communication  
 Intake List  
 Safety Assessment  
 Substance Abuse Screening  
 Forms/Notices  
 Category/Pathway Switch  
 Safety Plan  
 Actuarial Risk Assessment  
 Family Assessment  
 Ongoing Case All  
 Specialized All Tool  
 Law Enforcement  
 Justification/Waiver  
 Case Services  
 Legal Actions  
 Legal Custody/Status  
 Child Support Information  
 Living Arrangement / Guardianship  
 Initial Removal  
 Placement Request  
 Placement/CCA  
 Residential Treatment Information  
 Independent Living  
 Case Plan Tools  
 Visitation Plans  
 Review Tools  
 Family Team Meeting  
 Safety Reassessment  
 Reunification Assessment

Your data has been saved.

CASE NAME / ID: [ ] Ongoing HAZARD

Family Team Meeting Filter Criteria

From Date: [ ] To Date: [ ]

Purpose: [ ]

Status: [ ]

Facilitator: [ ]

Child: [ ]

Sort Results By: [ ]  Current Episode  View Historical

Created In Error:  Exclude  Include

Filter Clear Form

Family Team Meeting

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

	FTM ID	Date/Time of Meeting	Facilitator	Purpose	Agency/Created By	Status
view	5330075	05/08/2023 00:00 AM	Facilitator: Sam	Permanency Roundtable: Initial Meeting	[ ] Department of Job and Family Services	Completed
copy						
print						

Associated Children: [ ]

Add Family Team Meeting

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at [SACWIS\\_HELP\\_DESK@jfs.ohio.gov](mailto:SACWIS_HELP_DESK@jfs.ohio.gov).