

Knowledge Base Article

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Overview

This Knowledge Base Article describes how to navigate from the **Adoption Case Overview** screen to the **View Member Details** screens, which contain the following tabs:

- Adoption Members
- A/I Members
- Relationships
- Adoption Details
- Associated Persons



This article explains how to use each tab and what information to record on each tab.



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Navigating to the View Member Details Screens

To navigate to the **View Member Details** screens, complete the following steps:

- 1. From the Ohio SACWIS **Home** screen, click the **Case** tab.
- Click the Workload tab.
- 3. Select the appropriate Case ID link.

Note: If you know the **Case ID** number, you can also use the **Search** link to navigate to the **Case Overview** screen.



The Case Overview screen appears.



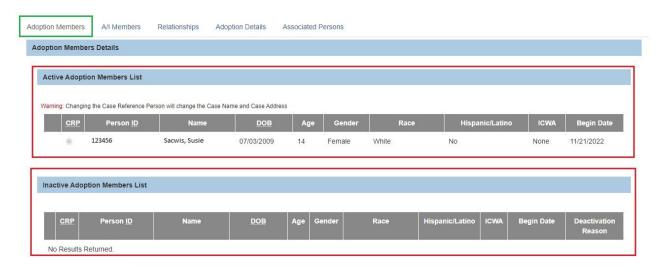
4. Click the View Member Details link.

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Maintaining Adoption Members Details

The **Adoption Members** tab appears.



The **Adoption Members** tab lists the child (or children if they are members of a sibling group) that have an agency **Legal Status** of **Permanent Custody** or **Permanent Surrender** and are members of the **Adoption Case**.

- The Active Adoption Members List displays the Person IDs of children who are Active members of the adoption case.
- The Inactive Adoption Members List displays the Person IDs of children who
 are Inactive members of the adoption case. (For example, the children on the
 case that have a sealed/secured adoption record.)
- The **Adoption Members Details** screen displays a **CRP** column with radio button (similar to the **Case Members** screen in an **Ongoing** case).
- The Person ID, Name, DOB, Age, Gender, Race, and Hispanic/Latino value will display for each adoption case member as entered on the Person Profile record.
- The Begin Date for the adoption case member is the adoption case creation date or the date they were associated to the adoption case. This date cannot be edited.

Changing the Adoption Member Case Reference Person (CRP)

Complete the following steps to change the **Case Reference Person (CRP)** of the Adoption Case.

Important: To change the **CRP**, the user must be **Assigned** to the case and must have the **CRP Updater User Group**.



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1. Select the **CRP** radio button in the row of the person you wish to designate as the CRP.



2. Click the **Save** button at the bottom of the **Adoption Members** tab.

Note: An **Inactive** Adoption Case Member can be the **CRP**. However, after the CRP has been changed to an **Active** Adoption Case Member, an Inactive Adoption Case Member cannot be selected as the CRP.

Changing an Adoption Case Member Status from Active to Inactive

Complete the following steps to change an **Adoption Case Member's** status from **Active** to **Inactive**.

Note: The child's **Legal Status** of **Permanent Custody/Permanent Surrender** must be terminated in order for the **Inactivate** link to appear.

1. Click the **Inactivate** link in the row of the person you wish to make **Inactive**.



If there are outstanding work items that need to be resolved for the child, the relevant **Validation Messages** will appear as shown in the example below.

Please correct the following data validation errors:

- All draft Provider Activity Logs for the child must be resolved.
- The child is a member of an Active Case Plan. Please amend the case plan.
- All ticklers associated to the child must be disposed.
- A placement discharge date and discharge reason must be entered on the child's placement record OR reactivate the child in their ongoing case.
- The child's custody episode must be terminated OR reactivate the child in their ongoing case.

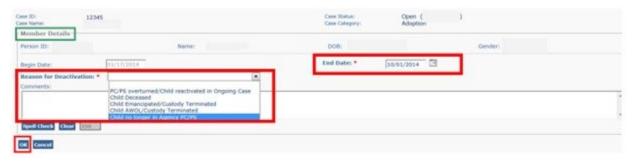
2. Resolve all of the outstanding validations (if applicable).



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3. Click the **Inactivate** link for the desired person.

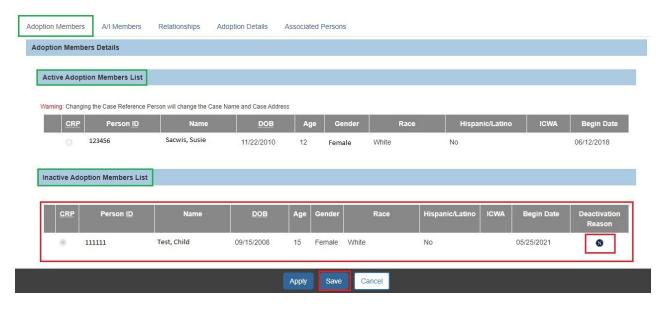
The **Member Details** screen appears.



- 4. Enter the **End Date** the child will be an Inactivated member. (Required)
- 5. Select the **Reason for Deactivation** from the drop-down list. (Required)
- 6. Record any additional **Comments** if applicable. (Optional)
- 7. Click the **OK** button.

The **Adoption Members** tab appears displaying the inactivated child in the **Inactive Adoption Members List**.

Note: The user can hover the cursor over the **N** (Narrative) icon in the **Deactivation Reason** column to display the selected Reason for Deactivation and any comments recorded on the Deactivation page.



8. Click the **Save** button.

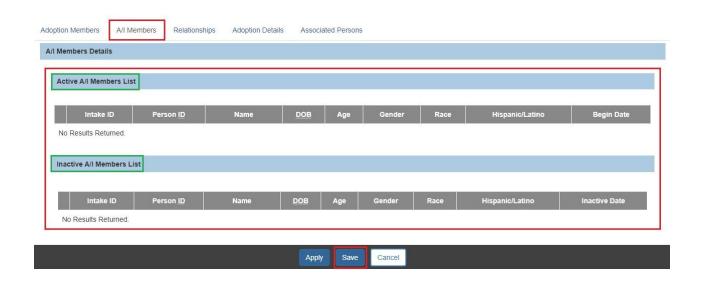


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Viewing A/I Members Details

1. Click the A/I Members tab.

The A/I Members Details screen appears.



The A/I Members tab lists the persons connected to the adoption case because they are an Intake Participant on an Intake that has been linked to the Adoption Case.

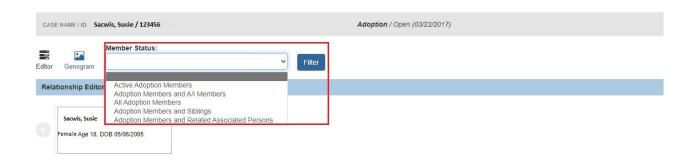
- The Active A/I Members List displays the Person IDs of individuals who are Active A/I Members in an Intake linked to the adoption case.
- The Inactive A/I Members List displays the Person IDs of individuals who are A/I Members in a Completed Intake that is linked to the adoption case.
- The Person ID, Name, DOB, Age, Gender, Race, and Hispanic/Latino value will display for each A/I Member as entered on the Person Profile record.
- The **Begin Date** for the **A/I Member** is the date that the **Intake** (in which they are a participant) was linked to the adoption case. This date cannot be edited.
- The Intake ID(s) linking an A/I Member to an adoption case display as a hyperlink to the Intake record.

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Maintaining the Relationships Details

1. Click the **Relationships** tab.

The **Relationships** tab appears.



The **Relationships** tab includes a drop-down menu:

- Active Adoption Members link includes all of the Adoption Members.
- Adoption Members & A/I Members Relationship link includes the relationships between the Adoption Members and the A/I Members.
- All Adoptions Members link includes the Adoptions Members and Sibling Relationship.
- Adoption Members and Siblings link includes all of the Adoption Members
 (both Active and Inactive) with a Sibling Relationship (i.e., Biological Sister, Half-Brother, Stepbrother). This link includes the Add Sibling option.
- Adoption Members and Related Associated Persons link includes all of the Adoption Members, Siblings and any other Persons Associated with the case.
- To view the Sibling Relationships for an Adoption Member, click the member's Name hyperlink.

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Add a Sibling/Relationship Information Record

To add new **Siblings** to an existing **Adoption Member** in this case, complete the following steps:

1. Select **Adoption Members and Siblings** from the **Member Status** drop-down menu.

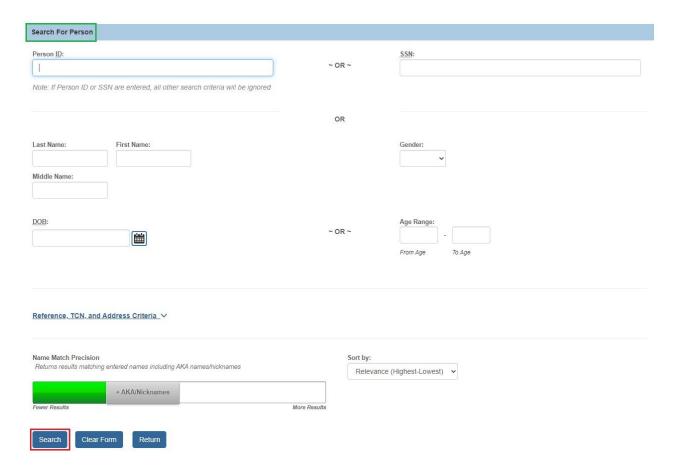


2. Click the **Add Sibling Information** button.

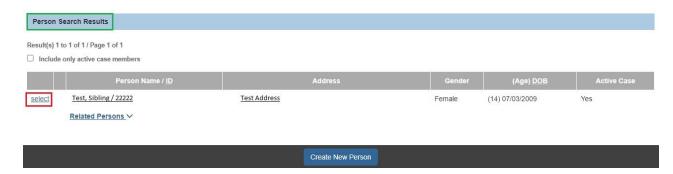
The **Person Search Criteria** screen appears.



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- 3. Enter search criteria into the appropriate fields OR enter the **Person ID**, if known.
- 4. Click the **Search** button.
- 5. If the desired person appears, click the **Select** link for that person in the **Person Search Results** section.
 - If you selected a person, skip to Step 10.



6. If no results are returned, click the **Create New Person** button.

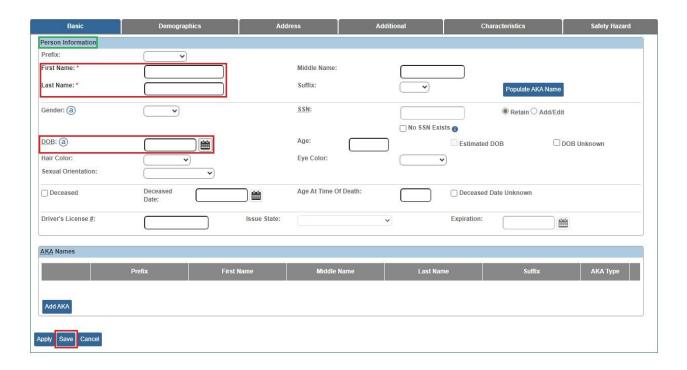


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The **Person Information** screen appears.

7. As shown below, enter data in the fields to create a **Person Profile** record.



8. Click the Save button.

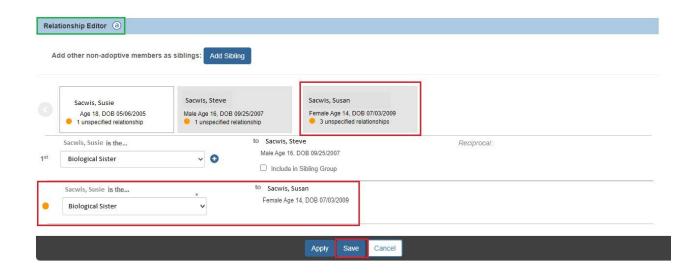
The **Sibling Details** screen appears.

- 9. Select the appropriate **Relationship** from the drop-down list. (Required)
- 10. Check the **Include in Sibling Group** checkbox if appropriate. (Optional)
- 11. Click the **OK** button.



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The **Siblings/Relationships** tab appears. A row for the new relationship displays in the Adoption Member's **Sibling Relationships** grid.



12. Click the **Save** button at the bottom of the **Siblings/Relationships** tab.

Maintaining Adoption Members & A/I Members Relationships

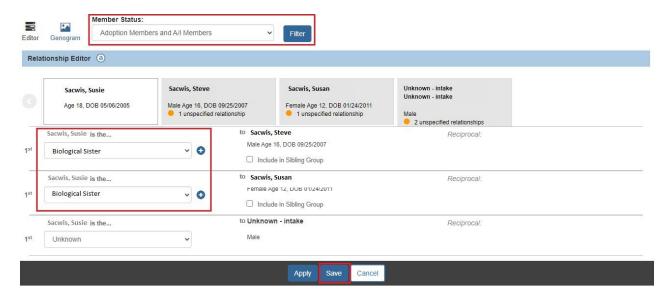
To add or edit relationships between **Adoption Members** and **A/I Members**, complete the following steps:

 Select Adoption Members and Al Members from the Member Status drop-down menu.

The **Relationships Grid** appears.



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2. Click the **Relationship** drop-down arrow to select the appropriate relationship.

Note: The selected **Relationship** represents the individual's **Relationship To** the identified person.

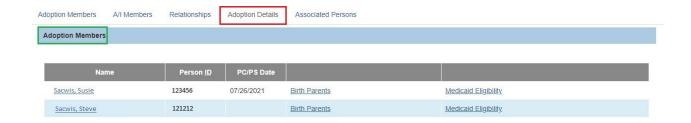
- 3. Repeat **Step 2** as needed to add/edit additional **Relationships**.
- 4. Click the **Save** button.

Maintaining Adoption Details

To view the **Adoption Details** for each **Adoption Member**, complete the following steps:

1. Click the **Adoption Details** tab.

The **Adoption Details** tab appears.

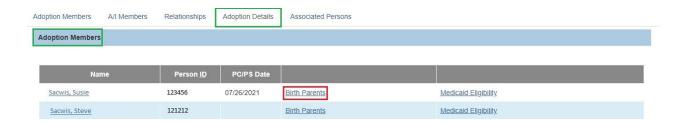




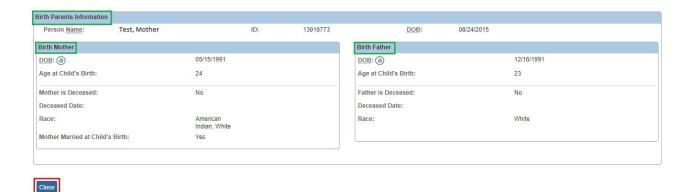
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The **Adoption Details** tab includes all (Active and Inactive) **Adoption Members**. The Adoption Members **Name** link is a hyperlink navigating to the **Person Profile**.

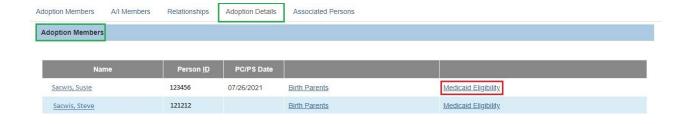
2. Click the **Birth Parents** link to record or view the child-specific putative father information.



The **Birth Parents Information** screen appears.



- 3. When complete, click the **Close** button to return to the **Adoption Details** tab.
- 4. Click the **Medicaid Eligibility** link to view the child's Medicaid Eligibility record.



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The Child Selection screen appears.



- 5. When complete, click the **Close** button to return to the **Adoption Details** tab.
- 6. Click the Save button.



Maintaining Associated Persons

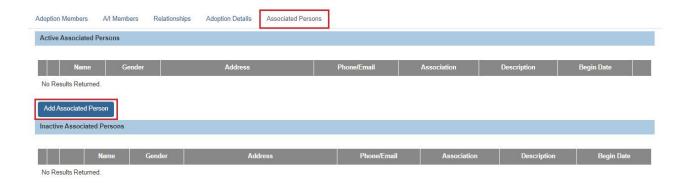
To view the **Associated Persons** for the **Adoption Case**, complete the following steps:

1. Click the **Associated Persons** tab.

The **Associated Persons** tab appears.



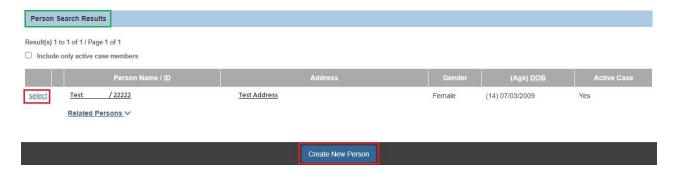
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2. To add an Associated Person to this Adoption Case, click the **Add Associated Person** button.

The **Person Search Criteria** screen appears.

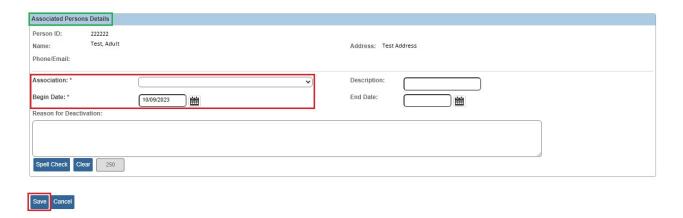
- 3. Enter search criteria into the appropriate fields OR enter the **Person ID**, if known.
- 4. Click the Search button.
- 5. If the desired person appears, click the **Select** link for that person in the **Person Search Results** section.
 - If you selected a person, skip to Step 8.



- 6. If no results are returned, click the **Create New Person** button to display the **Person Information** screen.
- 7. Enter data in the fields to create a **Person Profile** record and click the **Save** button.

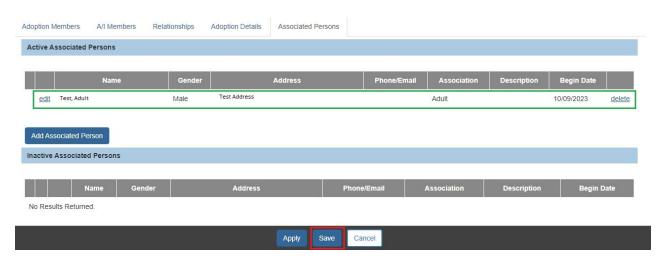
The **Associated Persons Details** screen appears.





- 8. Select the appropriate **Association** from the drop-down list. (Required)
- 9. Enter a **Description** for the association, if desired. (Optional)
- 10. The **Begin Date** field defaults to the current date. If needed, enter the appropriate **Begin Date** for this association.
- 11. Click the **OK** button.

The **Associated Persons** tab appears displaying a confirmation message and a row for the newly added Associated Person.



12. Click the **Save** button at the bottom of the **Associated Persons** tab.

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

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