Linking Intakes to a Case

Knowledge Base Article
### Table of Contents

Overview ........................................................................................................................................... 3
Viewing Intake Warning Messages ..................................................................................................... 3
Linking an Intake to a Case ................................................................................................................ 3
Selecting from the Link Case Screen ............................................................................................... 5
Creating a Case .................................................................................................................................. 7
Linking an Intake to a Non-Adoption Case
   The Case Information Screen View ................................................................................................. 7
Selecting Intake Participants to Add to the Case ................................................................................. 8
Linking an Intake to an Adoption Case
   The Case Member Details Screen View .......................................................................................... 9
Linking Intakes to a Case

Overview

This Knowledge Base Article (KBA) describes how to link an Intake to a Case, including an open Adoption Case. It describes the functionality that (in some instances) allows users to select which Intake Participants to add as Active Case Participants when linking an Intake.

Based on Intake Category and the Intake Type, certain rules apply as described in this article when linking to an Adoption Case.

Viewing Intake Warning Messages

When a child who is a member of an Adoption Case is added to the Intake as an Alleged Child Victim (ACV)/Child Subject of Report (CSR), warning messages will display on the Intake as a reminder when:

- The Intake Type and Intake Category selected cannot be linked to an Adoption Case.
- The ACVs/Child Subjects are not members of the same Adoption Case.

To resolve the warning message(s), take the following action, as applicable:

1. Correct the Intake Type and/or the Intake Category.
   and/or
2. Ensure that all ACVs/CSRs on the Intake are children in the same Adoption Case.
   If ACVs/CSRs are members of different Adoption cases, they will require separate Intakes.

Note: An Intake should always be linked to the ACV/CSR’s case.

Linking an Intake to a Case

1. On the SACWIS Home screen, click the Intake tab.
Linking Intakes to a Case

The **Intake Workload** screen appears.

2. Click the **link** hyperlink beside the Intake you wish to link to a case.

![]([image-url1])

The **Link Case** screen appears.

![]([image-url2])

The **Link Case** screen lists available cases to which the selected Intake ID can be linked, based on:

- Any existing cases in which one or more Intake Participants are Active or Historical members.

**Exception:** The **Warning Message** shown above will display when a particular Intake cannot be linked to the Adoption Case in which the Intake Participant(s) with a role of ACV/CSR or Child/Youth Subject of a Non-CA/N Report is a member.
Linking Intakes to a Case

**Note:** If the case is an Adoption Case AND the Intake Category/Intake Type is one of the combinations listed below, the Link Case screen displays a row for the case but does *not* display the link hyperlink for the case:

<table>
<thead>
<tr>
<th>CA/N Report</th>
<th>Baby Doe/Disabled Infant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dependency Report</td>
<td>Dependent Child</td>
</tr>
<tr>
<td>Family In Need of Services</td>
<td>One of the following:</td>
</tr>
<tr>
<td></td>
<td>• Adoption Subsidy Only</td>
</tr>
<tr>
<td></td>
<td>• Alt Response required Non Lead PCSA Contacts</td>
</tr>
<tr>
<td></td>
<td>• Emancipated Youth</td>
</tr>
<tr>
<td></td>
<td>• Home Evaluation/Visitation Assessment</td>
</tr>
<tr>
<td></td>
<td>• ICAMA</td>
</tr>
<tr>
<td></td>
<td>• ICPC</td>
</tr>
<tr>
<td></td>
<td>• Permanent Surrender</td>
</tr>
<tr>
<td></td>
<td>• Postnatal Placement Service to Infant of Incarcerated Mother</td>
</tr>
<tr>
<td></td>
<td>• Post-Finalization Adoption Services</td>
</tr>
<tr>
<td></td>
<td>• Preventative Services</td>
</tr>
<tr>
<td></td>
<td>• Safe Haven/ Deserted Child</td>
</tr>
<tr>
<td></td>
<td>• Unruly Delinquent</td>
</tr>
</tbody>
</table>

The Adoption Case row is *not* displayed on the Link Case screen when:

- The Adoption Case is closed.
- The Case Category is (Open or Closed) Adoption Subsidy Only.
- The Intake has a Screening Decision Date/Time that is prior to the Adoption Case Creation Date.
- The Adoption Case Member’s role in the Intake is not Alleged Child Victim, Child Subject of Report, or Child/Youth Subject of a Non-CA/N Report.

**Selecting from the Link Case Screen**

From the Link Case screen, the user can:

- View the list of Active Case Members for a case to help determine the appropriate case to which to link the Intake
- Access the Case Overview to help determine the appropriate case to which to link the Intake
- Select a case to which to link the Intake
- Create a new Case, if appropriate, to link the Intake
Linking Intakes to a Case

**Note:** You can click the **Plus Sign** next to the **Case ID** to view a list of Case Members (Active and Inactive).

The plus sign expands the entry and a list of **Case Members** appears.

Once you have determined one of the listed cases on the **Link Case** screen is the correct case to which the Intake should be linked:

1. Click the **link** hyperlink beside the **Case ID** number to which you are linking the Intake.

**Note:** The screen that appears will depend on the type of **Case** to which you are linking the Intake:

- The **Case Information** screen appears when linking to an existing **Non-Adoption** Case. *If the Case Information screen appears, refer to the Linking an Intake to a Non-Adoption Case-The Case Information Screen View section below.*

- The **Case Member Details** screen appears when linking to an Adoption Case. *If the Case Member Details screen appears, refer to the Linking an Intake to an Adoption Case-The Case Members Details Screen View section below.*
Linking Intakes to a Case

**Note:** If there are no cases listed (or none of the listed cases on the Link Case screen is the correct case), click, Create Case.

**Creating a Case**

The Create Case screen appears, displaying a list of Intake Participants who can be selected to become Case Members in the new case.

By default, each participant has a checkmark beside his or her name.

1. If any of the individuals listed should not be a Case Member, click the checkmark beside the appropriate Person ID to remove it from the checkbox. Removing the checkmark will prevent that particular person from being added to the case as a Case Member.
2. Click the name of the appropriate Case Reference Person.
3. Click, Save.

**Linking an Intake to a Non-Adoption Case-The Case Information Screen View**

Linking an Intake to a Non-Adoption Case, as stated above, will cause the Case Information screen to appear once you have selected the Case from the Link Case screen.
Linking Intakes to a Case

The **Case Information** screen is divided into four sections:

The **Case Information** section displays the basic case information such as the **Case Name**, **Case Status**, etc.

<table>
<thead>
<tr>
<th>Case ID</th>
<th>Case Name</th>
<th>Case Status</th>
<th>Case Category</th>
<th>Status Date</th>
<th>Agency</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The **Active Case Member** section displays the current Active Case Members.

<table>
<thead>
<tr>
<th>Name</th>
<th>Person ID</th>
<th>DOB</th>
<th>Effective Date</th>
<th>Relationship to CRP</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>01/01/2008</td>
<td>Case Reference Person</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>01/01/2009</td>
<td></td>
</tr>
</tbody>
</table>

The **Active Associated Persons** section displays any Active Associated Persons on the selected case.

<table>
<thead>
<tr>
<th>Name</th>
<th>Person ID</th>
<th>DOB</th>
<th>Effective Date</th>
<th>Association</th>
</tr>
</thead>
</table>

The **Intake Participants** section displays the Participants for the Intake that the user is linking to the selected case.

Selecting Intake Participants to Add to the Case

**Note:** Intake Participants who are *not* currently Active Members of the selected case, or not currently Active Associated Persons, will display with a checkbox and are available to be added as Case Members. This includes Inactive Case Members who may need to be reactivated.

1. Select the available **Intake Participants**, if any, to add as Active Case Members by placing a checkmark(s) in the applicable checkbox(es).
2. Click, **Link to Existing Case**.
Linking Intakes to a Case

**Important:** If the Intake is subsequently *unlinked* from the case, any Case Members who were added to the case will remain linked Case Members. If the members should *not* be linked to the case, go to the Case Members screen and delete them prior to unlinking the intake.

**Note:** If you have determined that the intake should NOT be linked to this case, click the Cancel button to return to the Link Case screen and make a different selection.

The Intake Workload screen appears with a message confirming the Intake has been linked to the Case.

**Note:** The Intake number is a hyperlink to the Intake. The Case number is a hyperlink to the Case Overview screen.

---

**Linking an Intake to an Adoption Case-The Case Member Details Screen View**

Linking an Intake to an Adoption Case, as stated above, will cause the Case Member Details screen to appear once you have selected the Case from the Link Case screen.

**The Case Member Details Screen**

The Case Member Details section displays basic case information including the Case Name and Case Status. It is divided into three sections.

**The Adoption Members section lists the current active Adoption Case Members.**
Linking Intakes to a Case

The **Intake Participants** section lists the Participants for the Intake the user is linking to the selected case.

[Table showing Intake Participants]

**Note:** When linking an Intake to an Adoption Case, the Intake Participants cannot be selected. Any Intake Participants, who are not already Adoption Case Members, automatically become A/I Members in the Adoption Case (if the Intake is a Screened In CA/N or FINS/Stranger Danger) so they may be linked to the applicable CAPMIS tools. For all other Intakes, no A/I Members will be created.

1. Click, **Link to Existing Case**.

[Image showing Link to Existing Case button]

**Important:** If it is determined that the Intake should *not* be linked to the case, click the **Cancel** button to return to the **Link Case** screen and select a different case.

The **Intake Workload** screen displays a message confirming the Intake has been linked to the case.

[Image showing Intake Workload screen]

If you need additional information or assistance, please contact the SACWIS Help Desk.