CREATING AND LINKING A YOUNG ADULT SERVICES INTAKE

Knowledge Base Article

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Creating and Linking a Young Adult Services Intake

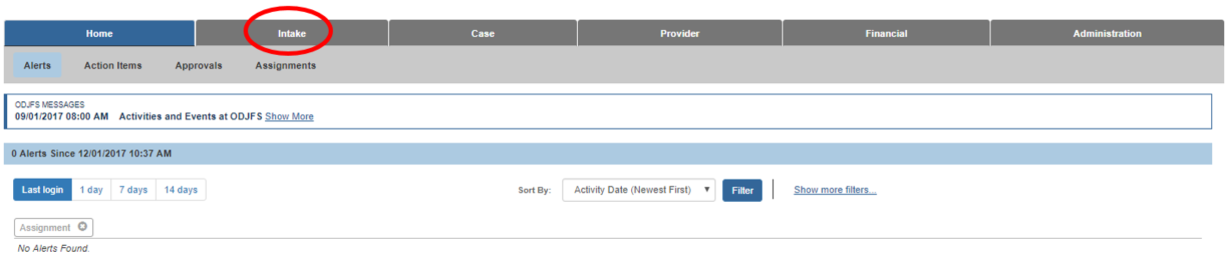
Overview

This article provides step-by-step instruction for completing and linking a Young Adult Services Intake.

Creating the Intake

From the SACWIS Home Screen:

1. Click the **Intake** tab.

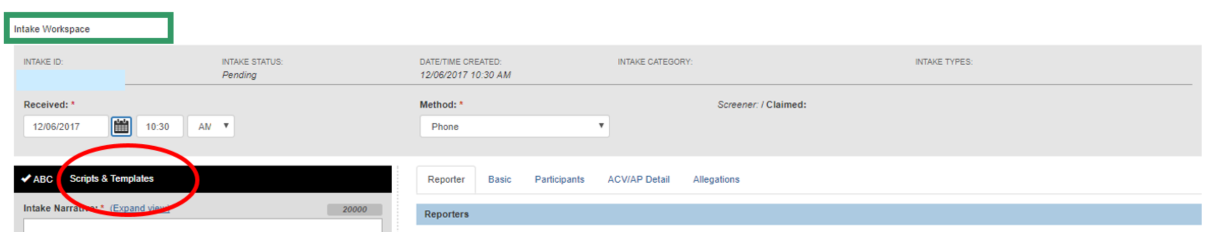


The **Intake Workload** screen appears.

2. Click **Add Intake**.

The **Intake Workspace** screen appears.

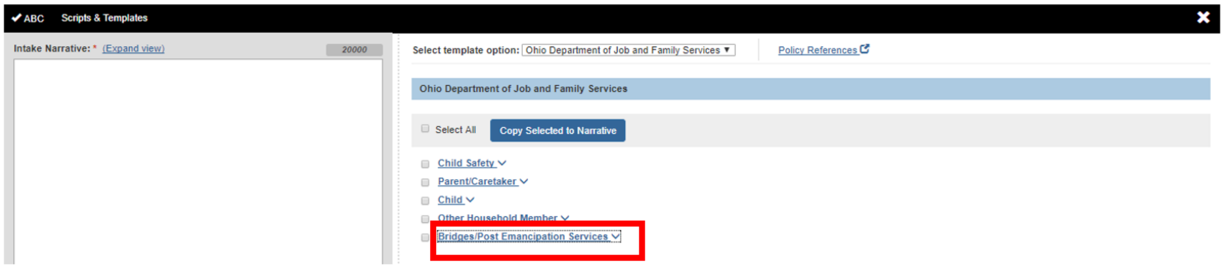
3. Click **Scripts & Templates**.



A list of narrative options appears.

Note: Each entry in the list of narratives is a link that can be expanded to reveal a list of guiding questions.

4. Click the **Bridges/Post Emancipation Services** link.



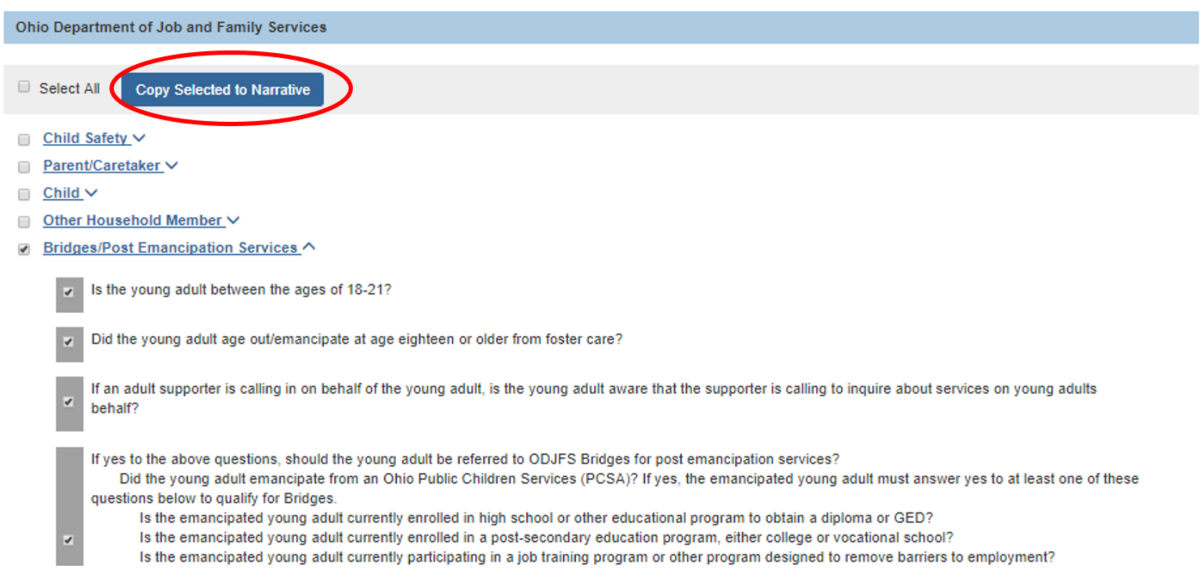
The link expands to show a list of guiding questions for the narrative related to a Post Emancipation intake.

Note: The narrative field is where the details about the referral/request for services should be documented. The narrative remains fully editable while the Intake is pending.

5. If desired, select a specific question(s) to copy into the narrative by placing a checkmark(s) in the checkbox(es) beside the question(s).

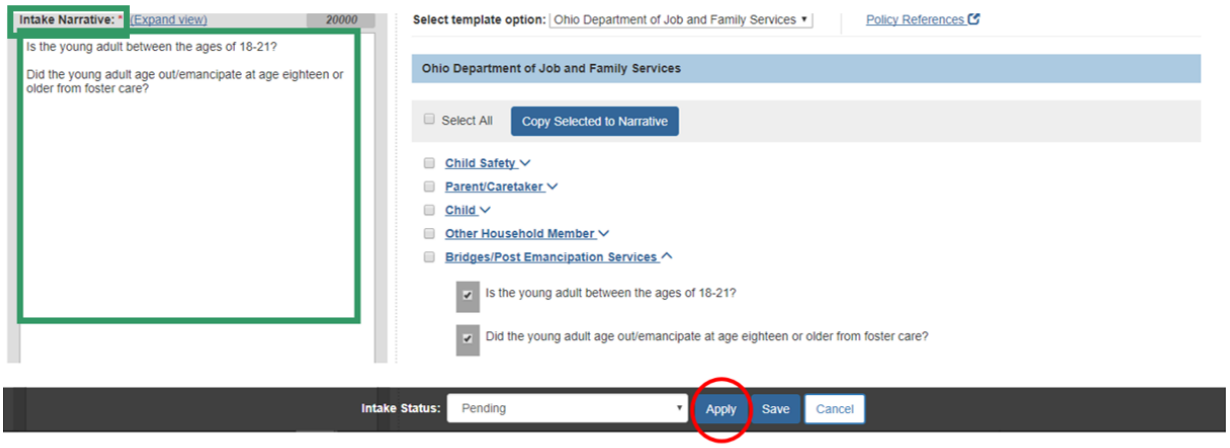
   Note: If you place a checkmark in the checkbox beside **Bridges/Post Emancipation Services** (once you have expanded the link), all the narrative entries will be selected.

6. Click **Copy Selected to Narrative**.



The questions you selected appear in the **Intake Narrative** grid.

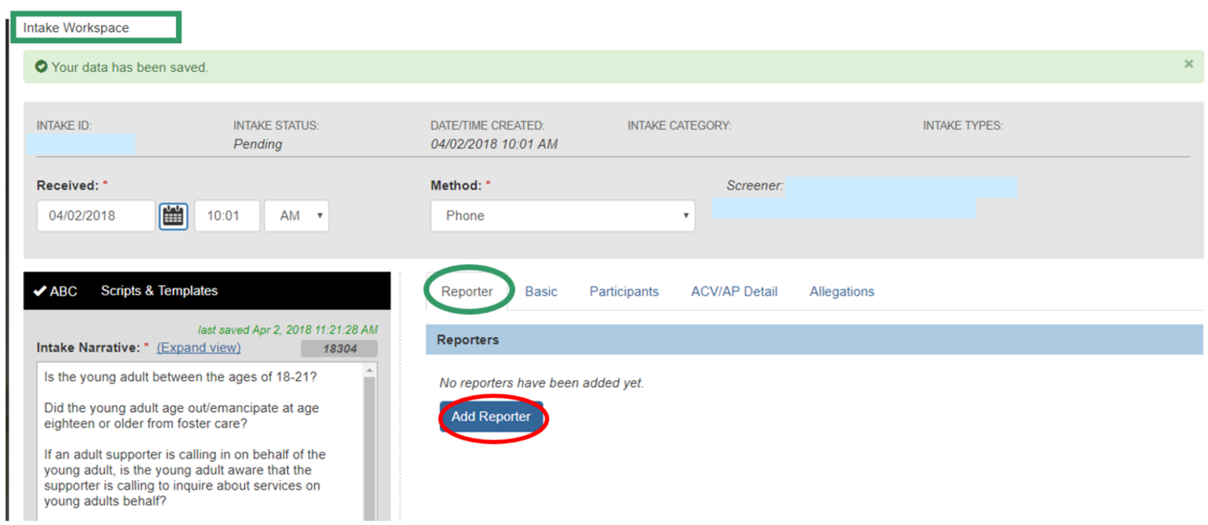
7. Click **Apply**.



The **Intake Workspace** screen appears on the Reporter tab view.

Completing the Reporter Tab

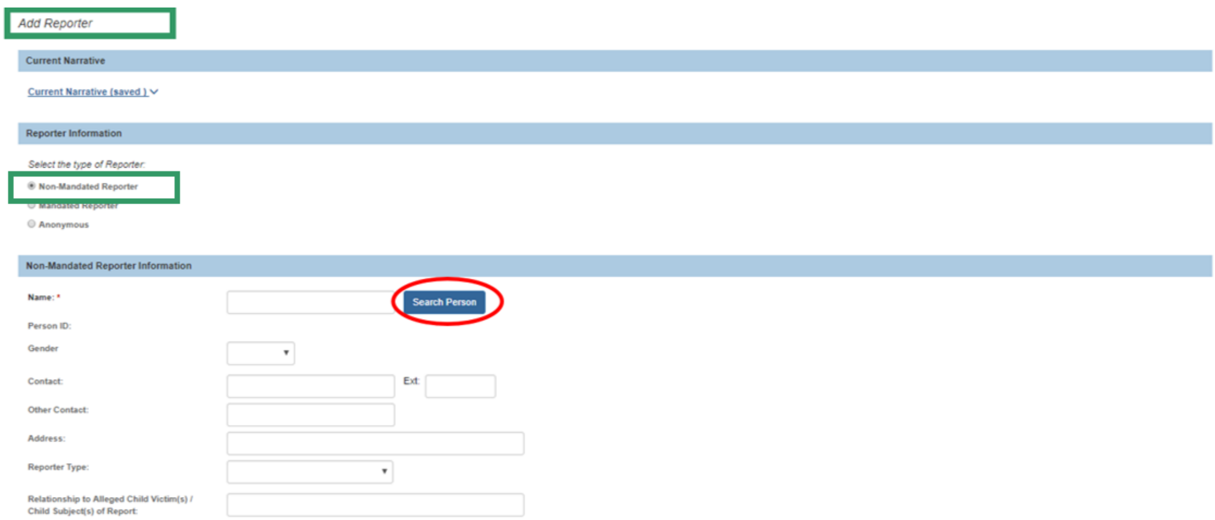
1. Click **Add Reporter**.



The **Add Reporter** screen appears.

Note: The **Reporter Information** section will default to **Non-Mandated Reporter** (this is the correct selection when the reporter is an emancipated youth).

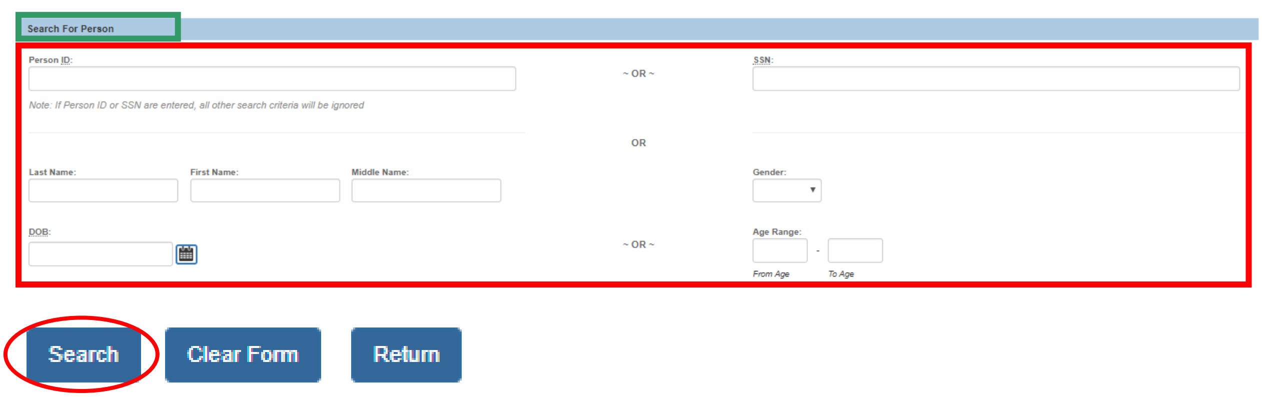
2. Click, **Search Person**.



The **Search For Person** screen appears.

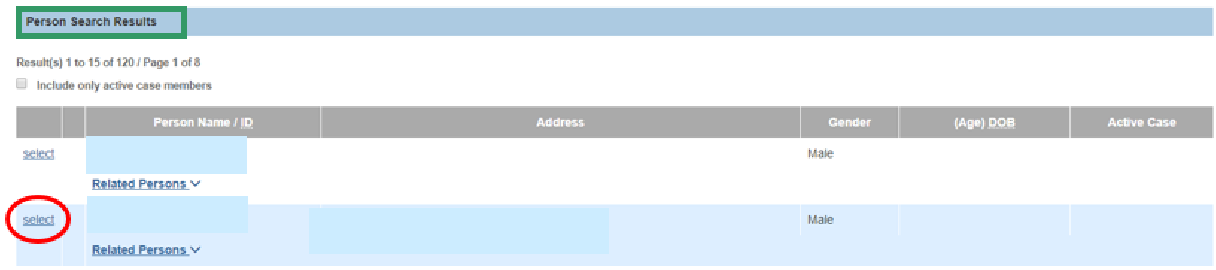
3. Enter the name of the Reporter, and any other available information.
4. Click **Search**.

Note: For more information on search functionality, please see the KBA, [Using Search Functionality].



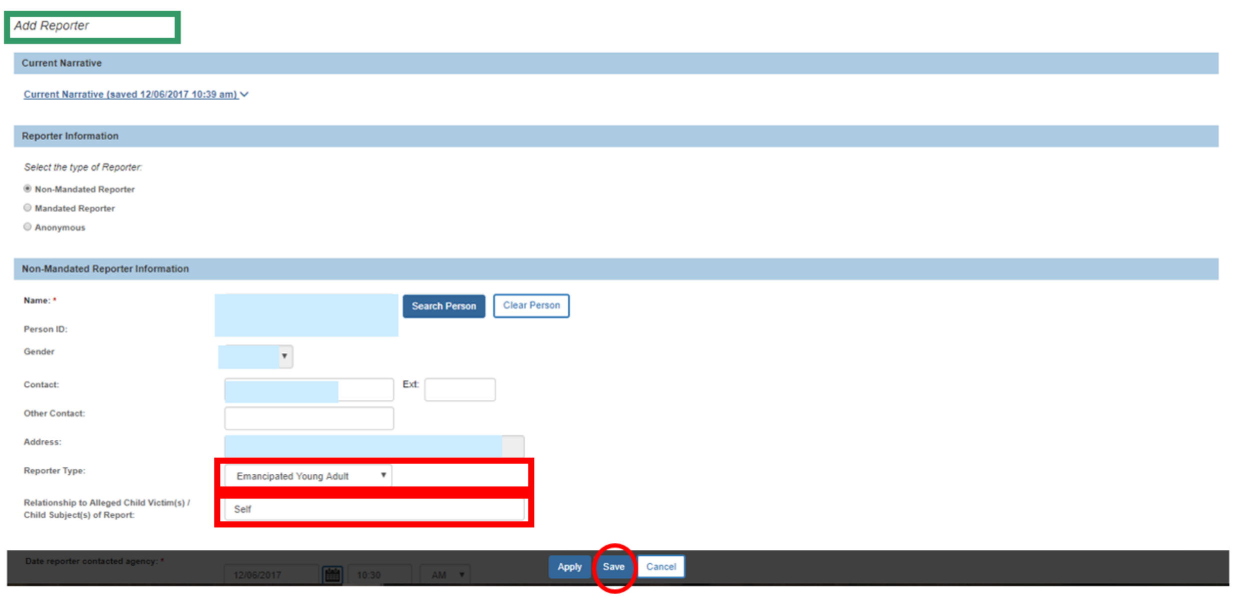
The results appear in the **Person Search Results** section.

5. Click **select**, beside the appropriate person's name.



The **Add Reporter** screen appears, displaying information about the selected reporter.

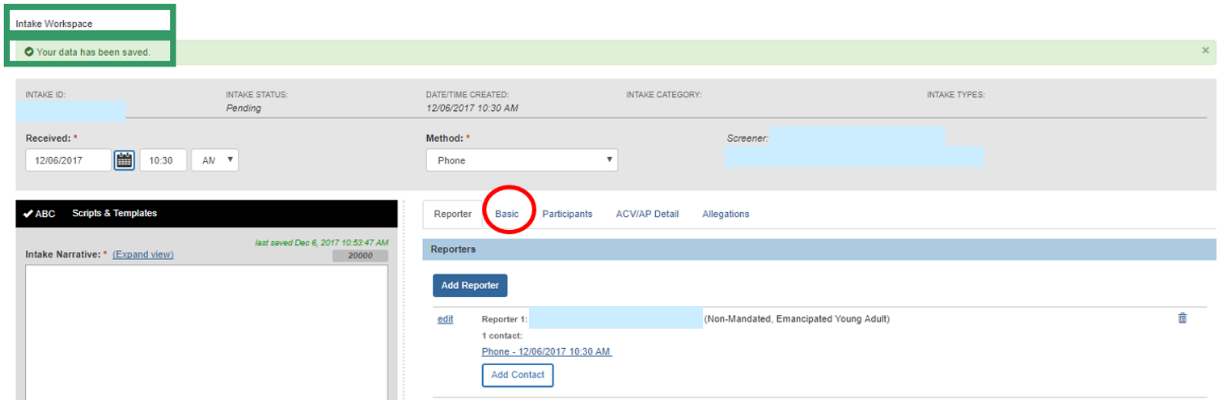
6. Select **Emancipated Young Adult**, from the **Reporter Type** drop-down menu, or other value if appropriate.
7. Enter the word "Self" in the text box titled: **Relationship to Alleged Child Victim(s)/Child Subject(s) of Report**, or record the relationship of the reporter to the Emancipated Young Adult if another person is making the referral.
8. Click **Save**.



The **Intake Workspace** screen appears, displaying the message: **Your data has been saved**.

9. Click the **Basic** tab.

   Note: Your changes will be saved as you navigate through the tabs.



The **Basic** tab view appears.

Completing the Basic Tab

1. Select **Post Emancipation** from the **Intake Category** drop-down menu.

   Note: Once you select Post Emancipation from the Intake Category, the tab titled, **ACV/AP Detail** and the tab titled, **Allegations**, disappear.

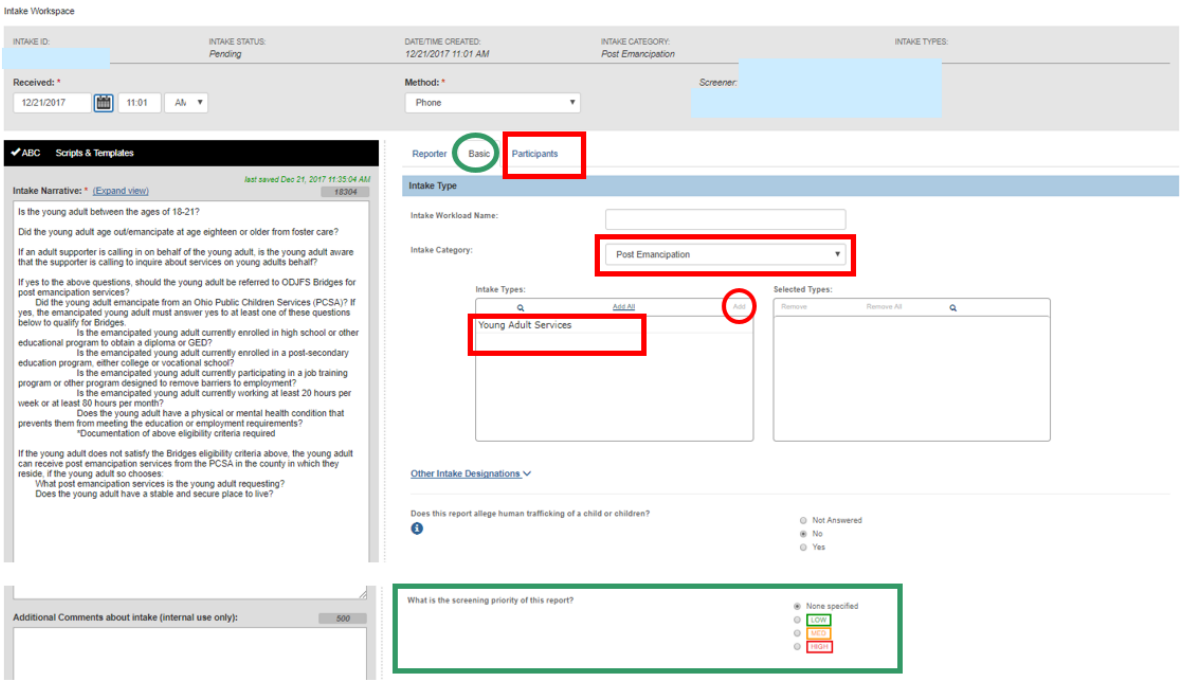
2. Select **Young Adult Services** from the **Intake Types** grid (this activates the **Add** button).
3. Click **Add** (this adds Young Adult Services to the **Selected Types** grid).
4. Complete the questions (required).

Note: Selecting a screening priority is optional.

Important: If you click the **Other Intake Designations** link, an expandable drawer will display with other available intake designations that may be applicable to the intake.

Completing the Participants Tab

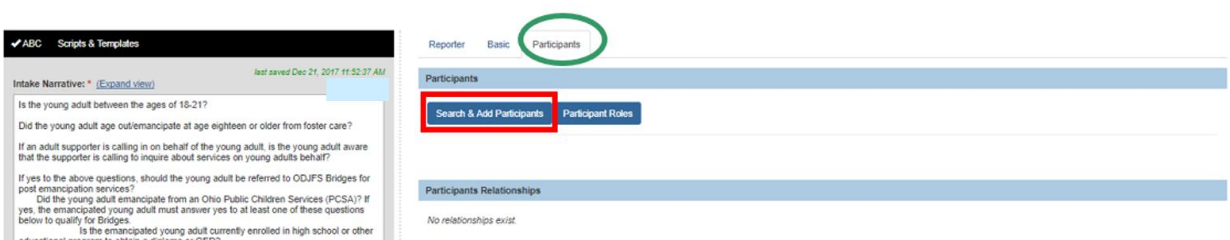
1. Click the **Participants** tab.



The **Participants** tab view appears.

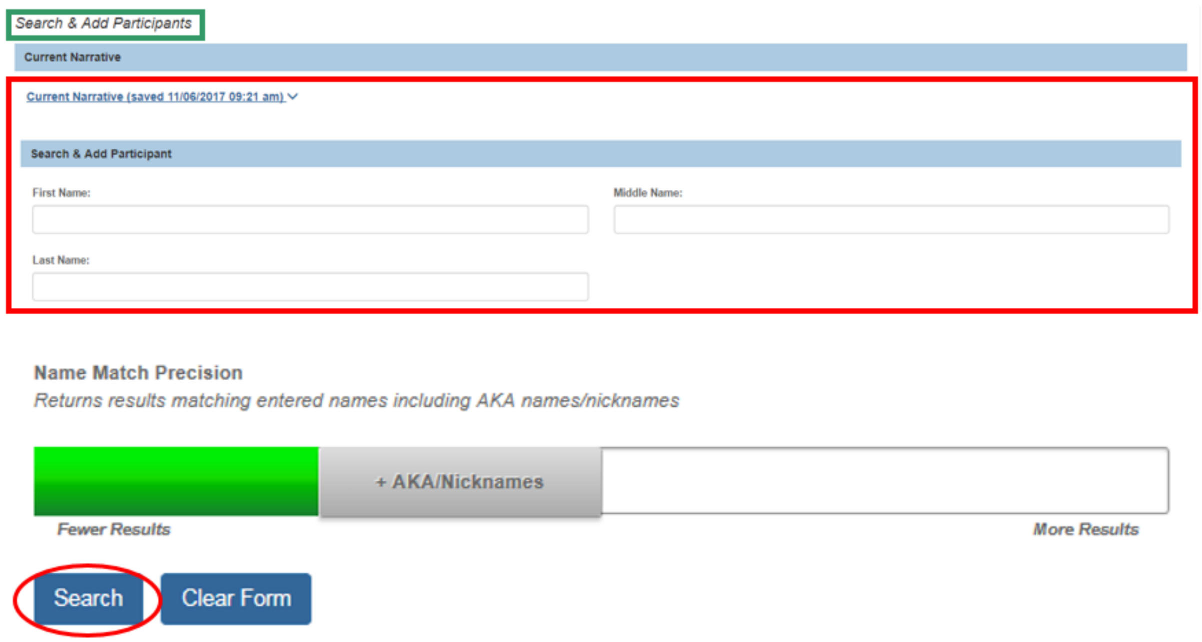
Note: In the event the reporter entered is the Emancipated Young Adult, the system will automatically add the person to the participants page without the user having to conduct the search. For additional information regarding searches, please see the following Knowledge Base Article: [Using Search Functionality](#).

2. Click, **Search & Add Participants**.



The **Search & Add Participants** screen appears.

3. Fill in available information.
4. Click **Search**.



The results appear in the **Search Results** section.

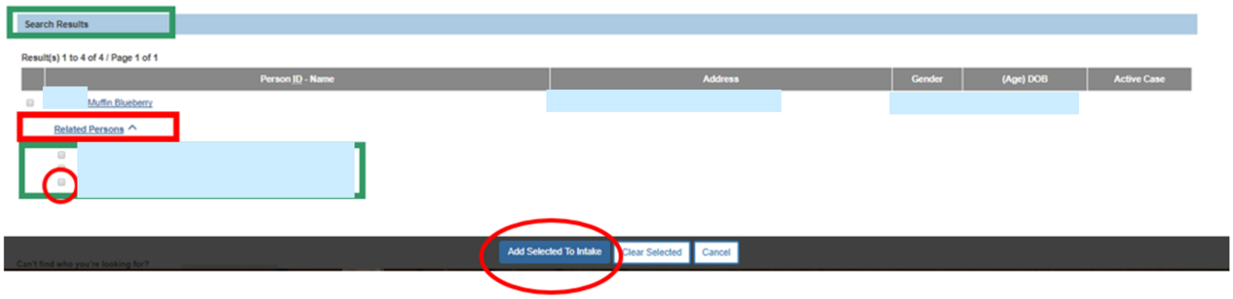
Important: Any Young Adult who emancipated from an Ohio PCSA will have a record in SACWIS. If your search does not provide desired results, please follow the steps in the **Create New Person** section below.

5. Place a checkmark in the checkbox next to the appropriate individual's name.

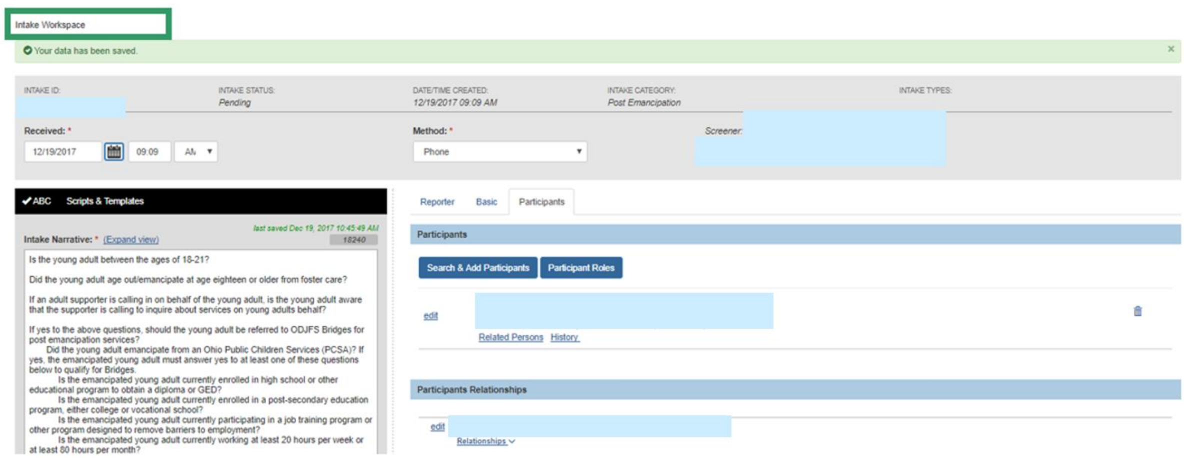
   Note: If you click the **Related Persons** link, a list of persons related to the individual is displayed.

6. Click **Add Selected To Intake**.

Note: For further information on Searching, please see the following Knowledge Base Article: Using Search Functionality.



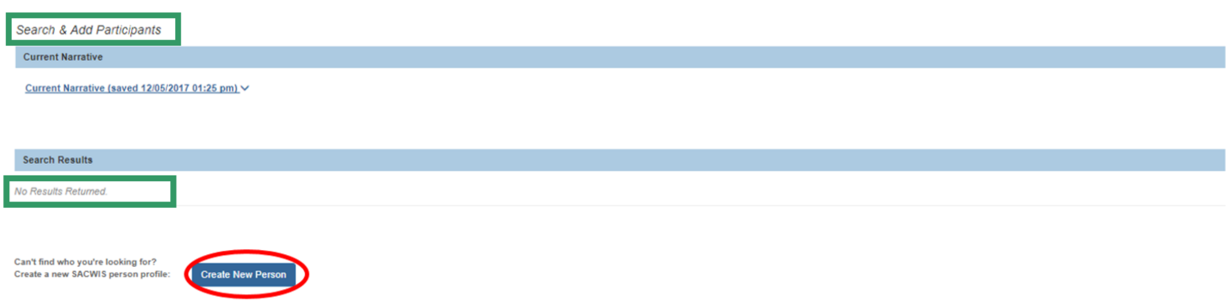
The **Intake Workspace** screen appears, displaying the added individual.



Creating a New Person

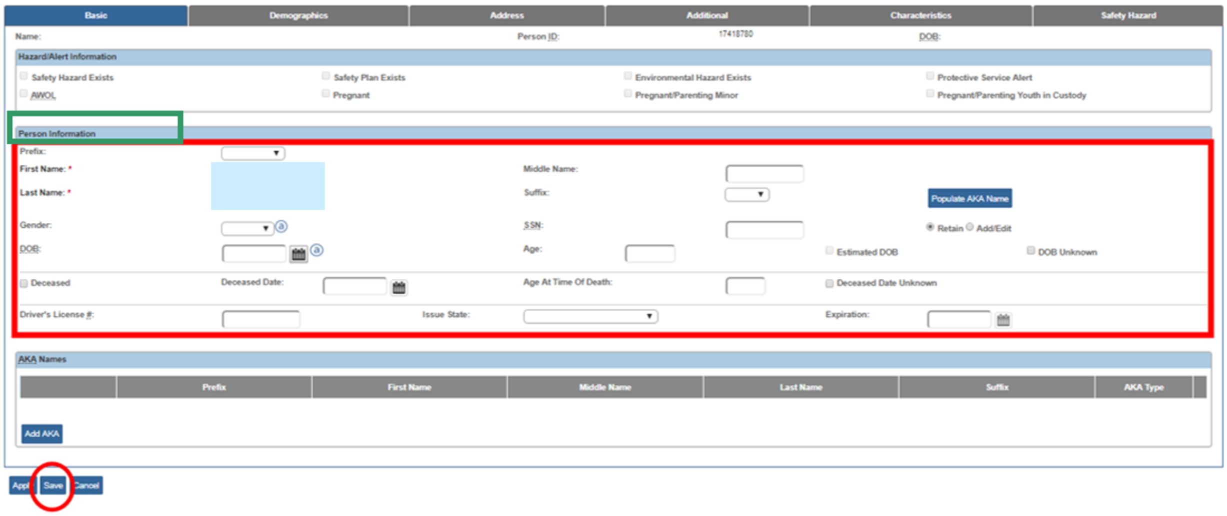
On the **Search & Add Participants** screen:

1. Click, **Create New Person**.



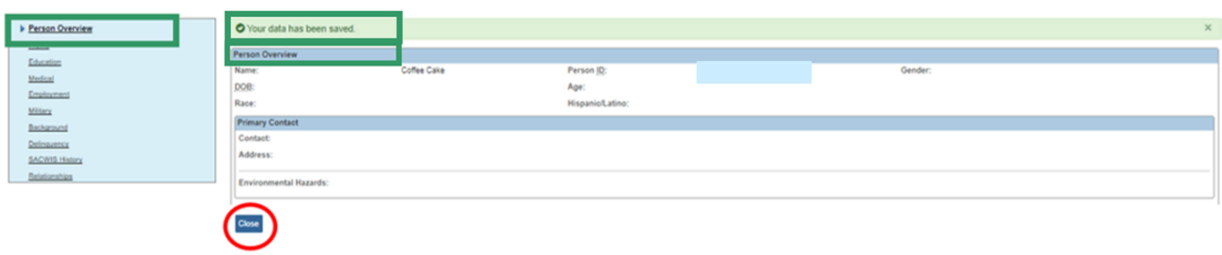
The **Person Profile** screen appears, defaulted to the **Basic** tab.

2. Fill in any required information (denoted with a red asterisk) and any other available information under each heading.
3. Click **Save**.



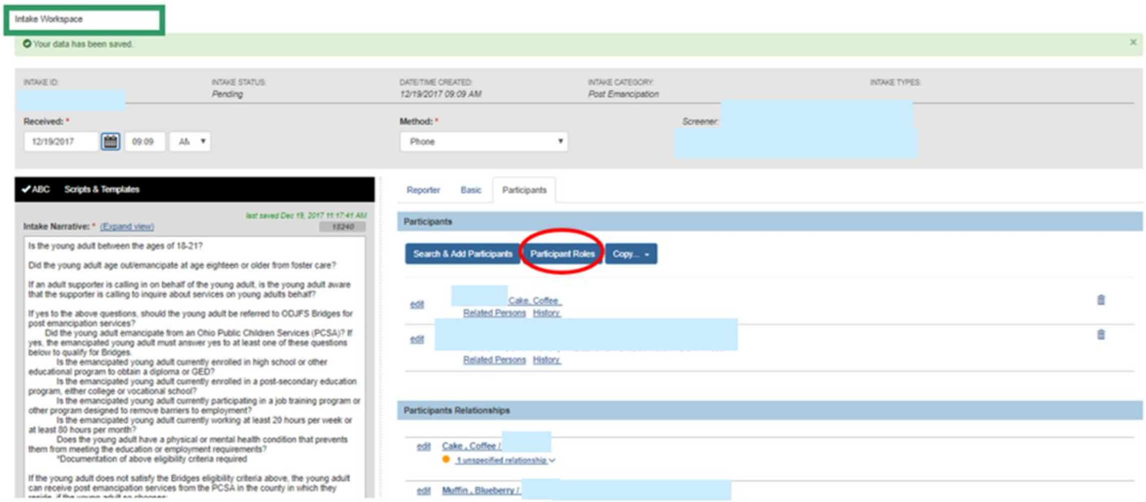
The **Person Overview** screen appears, displaying the following message: **Your data has been saved**.

4. Click **Close**.



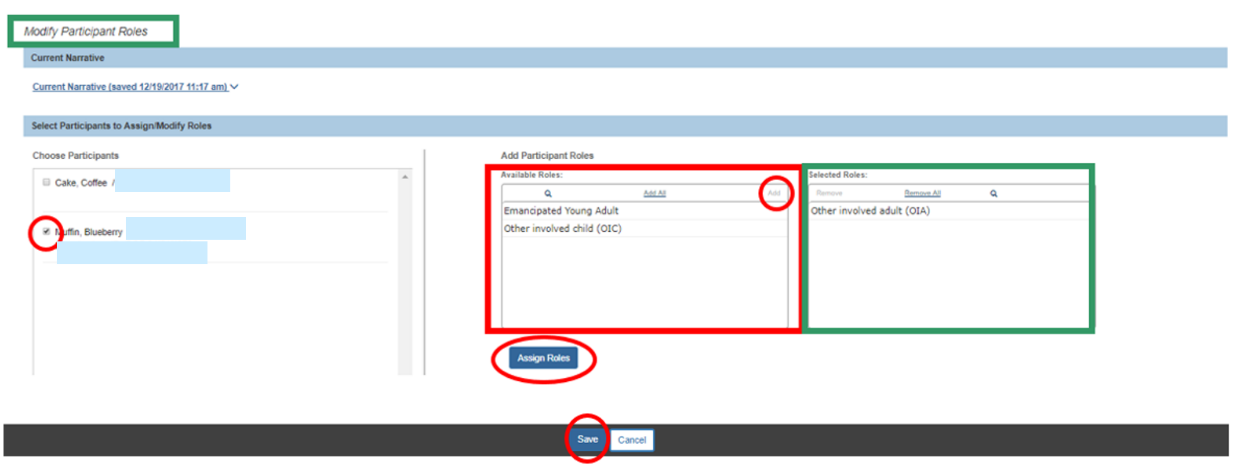
The **Intake Workspace** appears, displaying the added individual.

5. Click **Participant Roles**.



The **Modify Participant Roles** screen appears.

1. Place a checkmark in the box next to the appropriate name in the **Choose Participants** section.
2. Click on the appropriate selection from the **Available Roles** list (this will activate the **Add** button).
3. Click **Add**.
   Note: When you click **Add**, the role you selected for the added participant is moved to the **Selected Roles** screen, and the **Assign Roles** button becomes active.
4. Click **Assign Roles**.
5. Click **Save**.



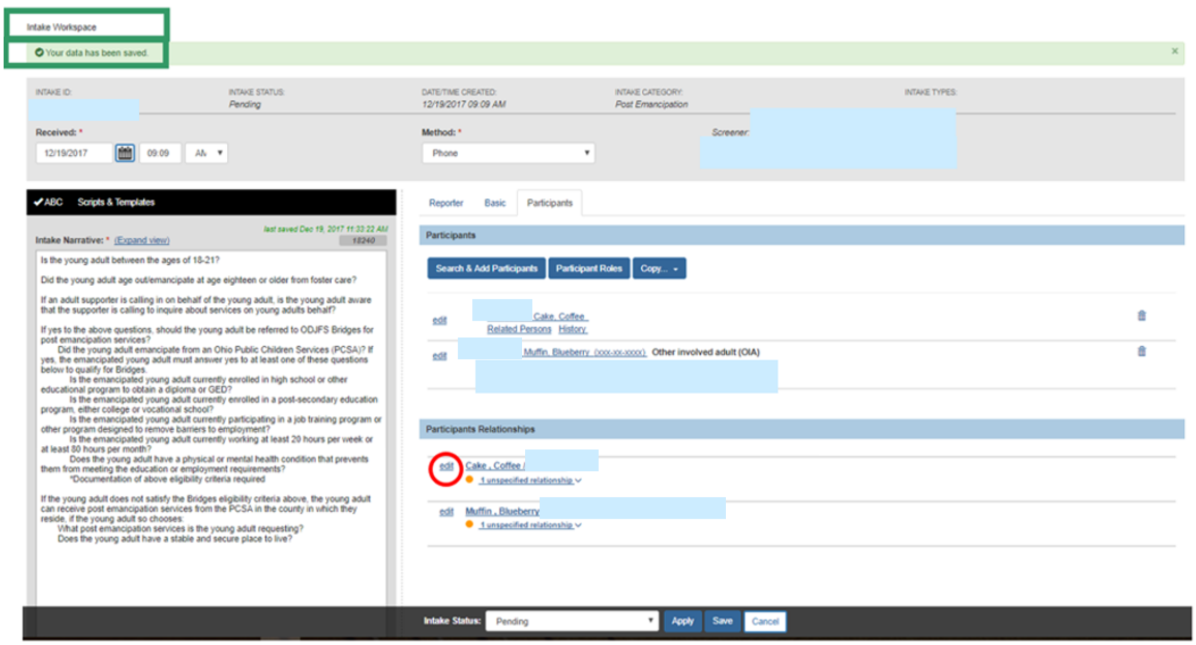
The **Intake Workspace** screen appears, displaying the following message: **Your data has been saved**.

Important: If additional people are added to the intake as participants, then the relationships between all participants must be specified. When persons are selected, existing relationships will be automatically added. Any relationships that have not been specified in SACWIS will be denoted with an orange dot.

Resolving Unspecified Relationships

Once you add participants to the intake, any with unspecified relationships will be denoted with an orange dot.

1. Click **edit** beside the name of an individual, in the **Participants Relationships** section.



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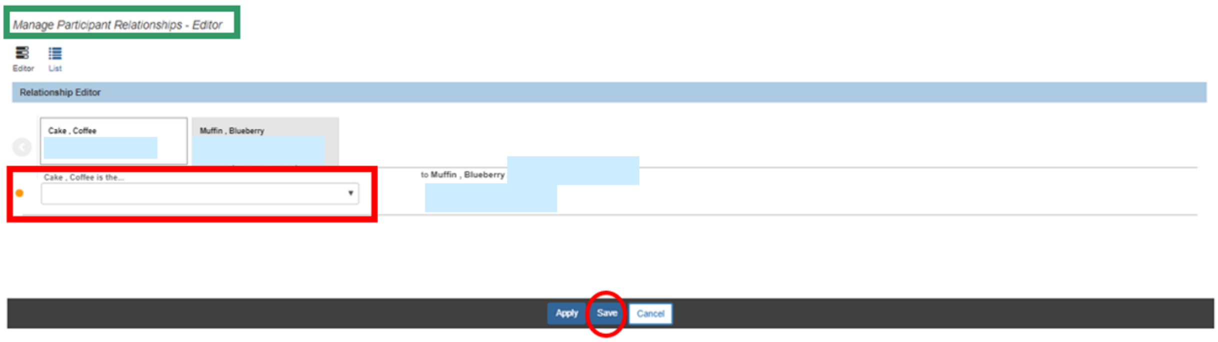
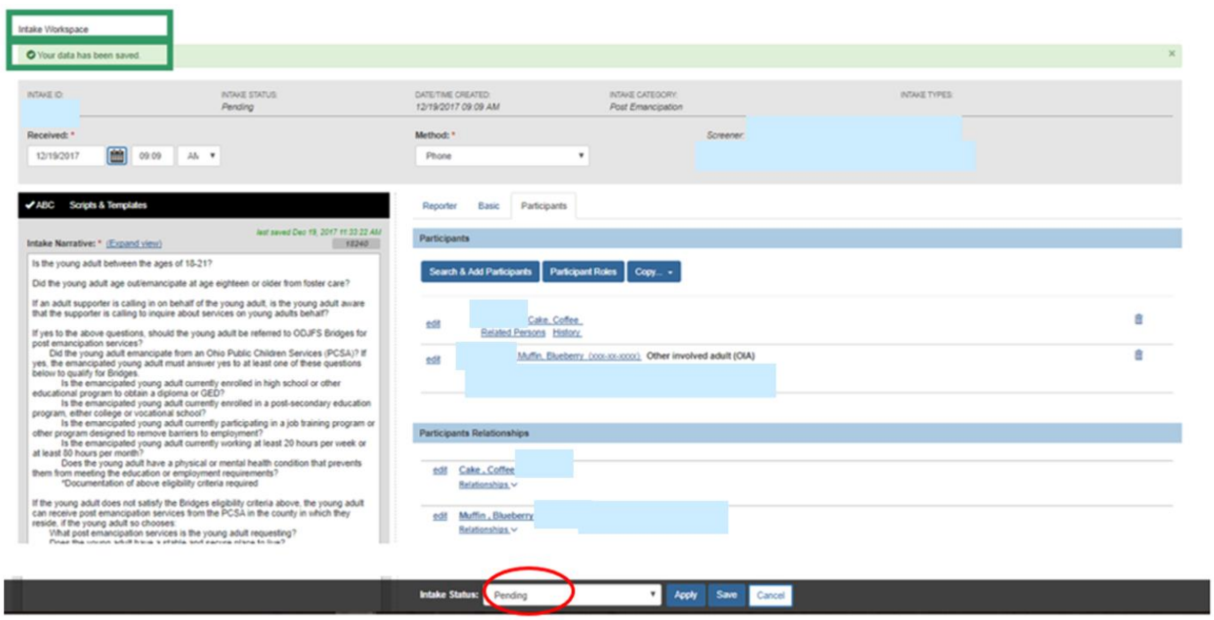
The **Manage Participant Relationships - Editor** screen appears.

2. Make a relationship selection from the drop-down menu.
3. Click **Save**.

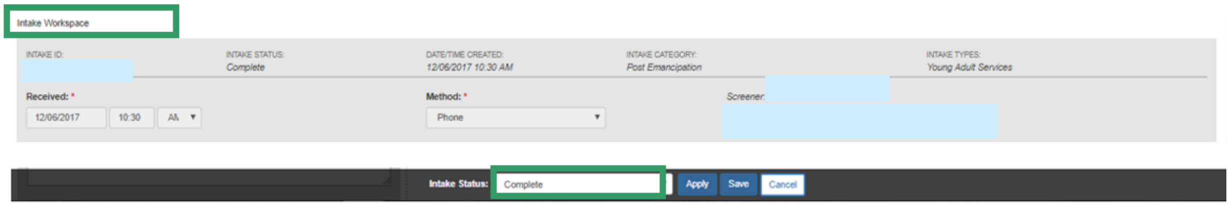


The **Intake Workspace** screen appears, displaying the following message: **Your data has been saved**. The orange dots no longer appear because the relationships have been recorded.

4. Select **Complete**, from the **Intake Status** drop-down menu.



The **Intake Workspace** appears, displaying the **Complete** status.



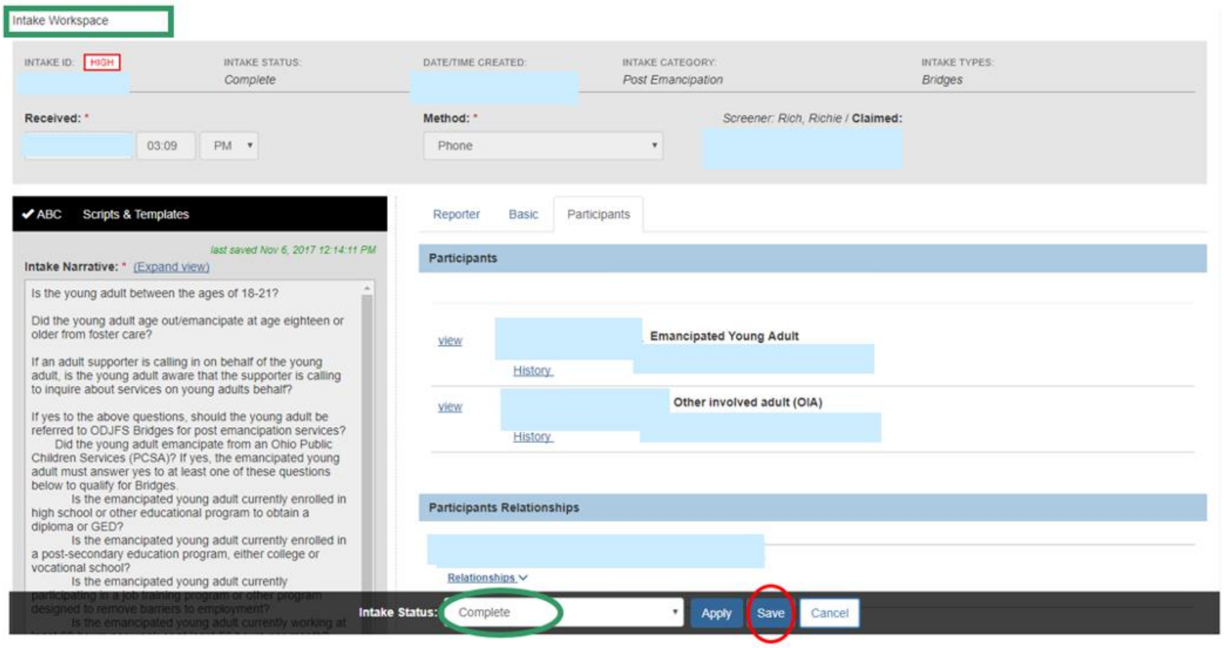
Important: If required information is incomplete, the Intake Status will remain as Pending, and a message similar to the one below in red will appear:

Note: The tab where information is missing is listed in parentheses.

5. Click on the appropriate tab (in this particular case, the **Reporter** tab) and enter the missing information.

If the required information is complete, the **Intake Workspace** screen appears showing a status of **Complete**.

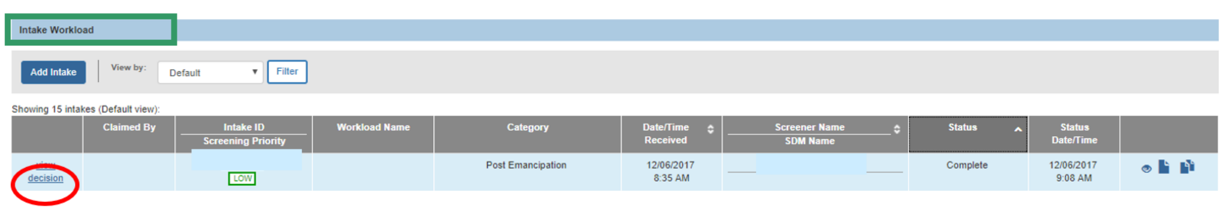
6. Click **Save**.
7. **Important**: If you have screening decision maker security, the Decision tab will display and you can skip to the **Making a Decision** section. If you do not have screening decision maker security, you are finished with the Intake once you are returned to the Intake Workload. The intake will be picked up for a decision (by the screening decision maker) from the workload.



The **Intake Workload** screen appears, displaying the intake.

Recording the Screening Decision

1. Click **decision**.



The **Intake Workspace** screen appears.

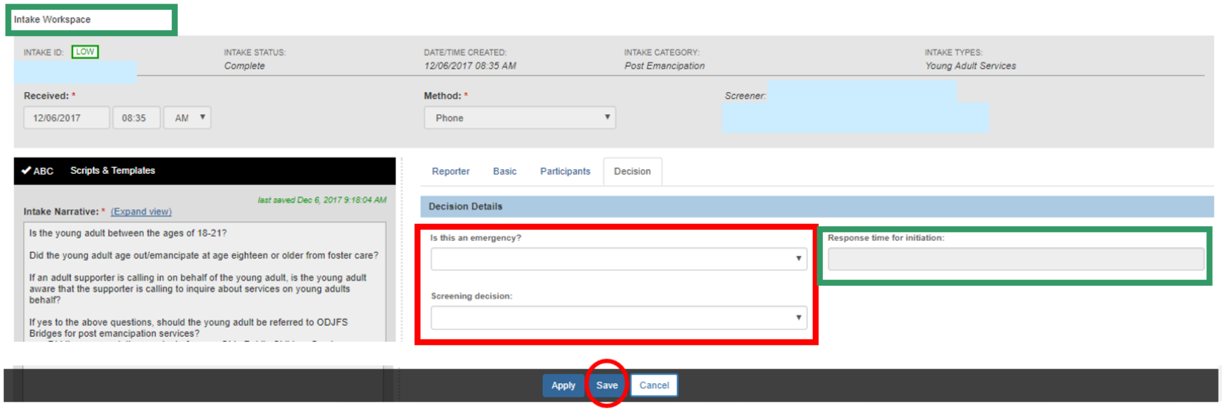
2. Make a selection from the drop-down menu under, **Is this an emergency?**

Note: Your selection to the above question will populate the **Response time for initiation**.

3. Make a selection from the drop-down menu under **Screening decision**.

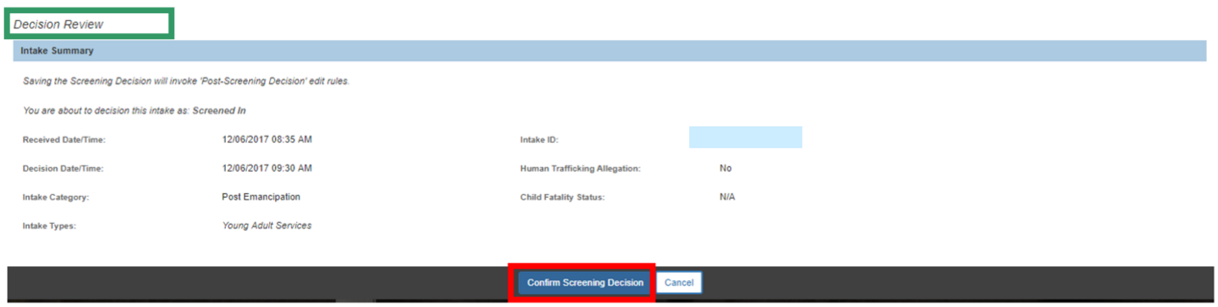
   Note: Based on your selection for the Screening decision, you will be prompted for further information specific to your choice.

4. When you have completed the information, click **Save**.



The **Decision Review** screen appears.

5. Click **Confirm Screening Decision**.

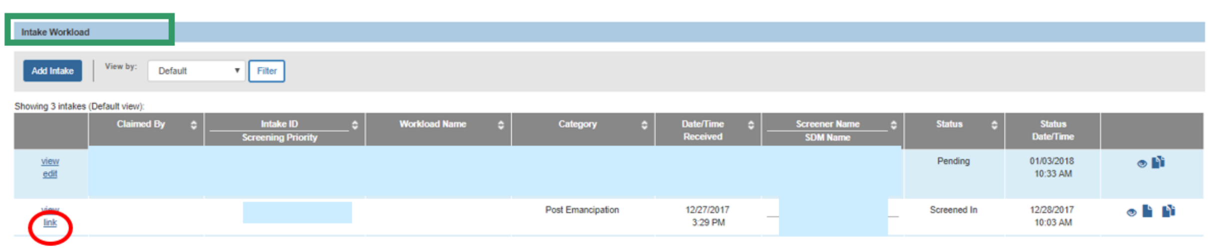


The **Intake Workload** screen appears, displaying the intake with a **Screened In** status.

Linking a Post-Emancipation Intake to a Case

1. Click the **link** hyperlink beside the appropriate **Intake ID**.

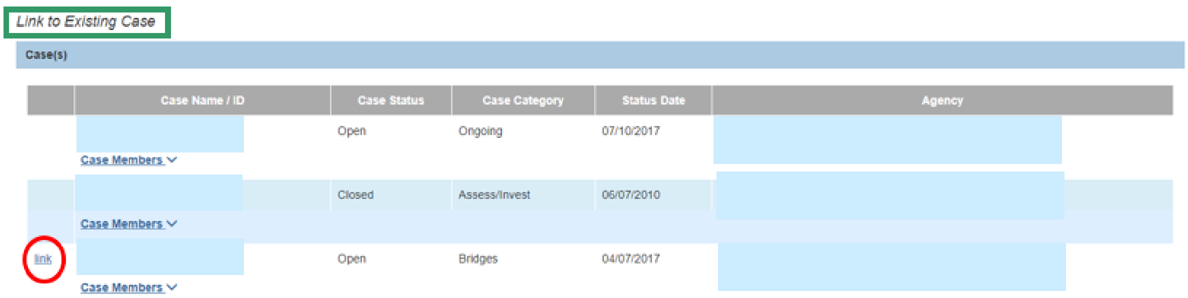
   Important: If you click the **link** hyperlink and there is no appropriate Case to link the Intake, please see **Creating a Case** instruction below.



The **Link to Existing Case** screen appears.

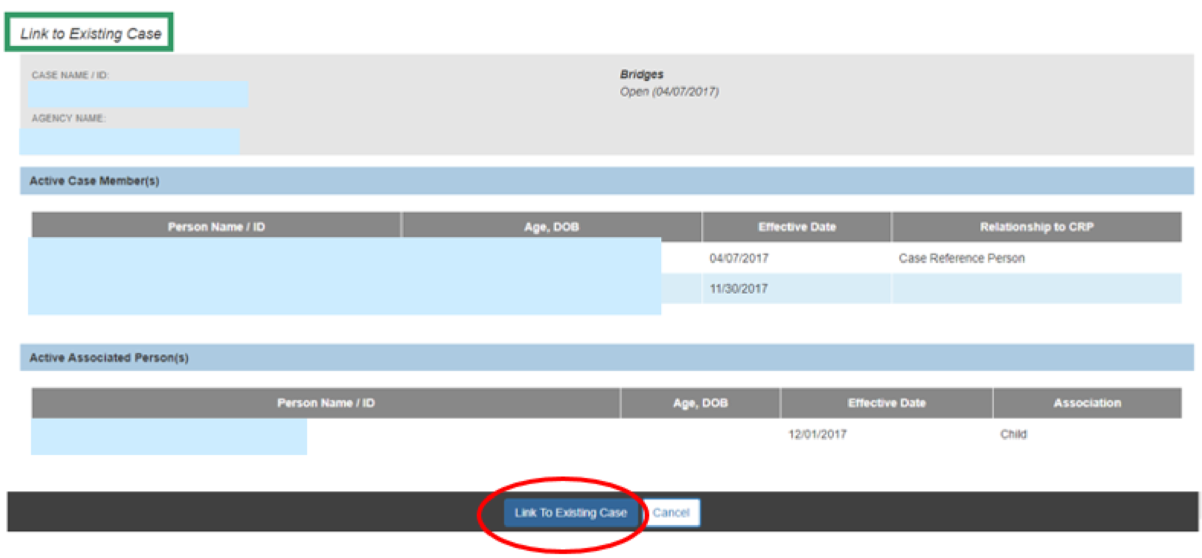
Important: If the young adult already has an existing Bridges or Young Adult Services case (open or closed), it will appear in the case list on the **Link to Existing Case** screen. The existing Bridges or Young Adult Services case will have a link hyperlink. Other types of cases, in which the Emancipated Young Adult has been a member, will display on that page for information purposes, but will not be available to link. If there is no existing Bridges or Young Adult Services case, skip to **Creating a Case** instructions below.

2. Click the **link** hyperlink beside the existing Bridges or Young Adult Services case.

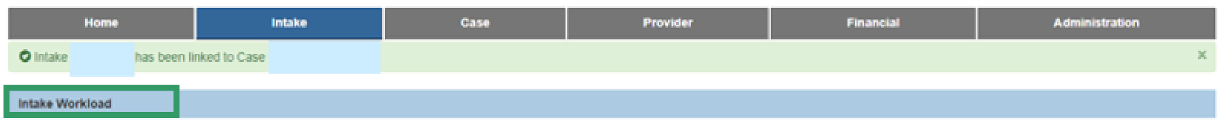


The **Link to Existing Case** screen appears, displaying information regarding the existing case.

3. Click **Link To Existing Case**.



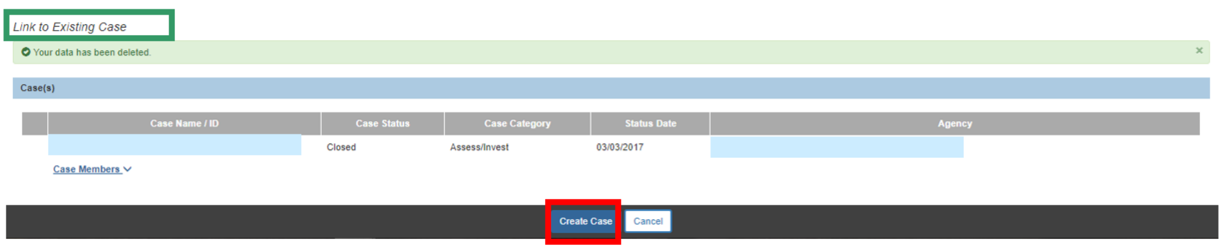
The **Intake Workload** screen appears, displaying the following message**: Intake #... has been linked to Case #...**



Creating a Case

On the **Link to Existing Case** screen:

1. Click, **Create Case**.

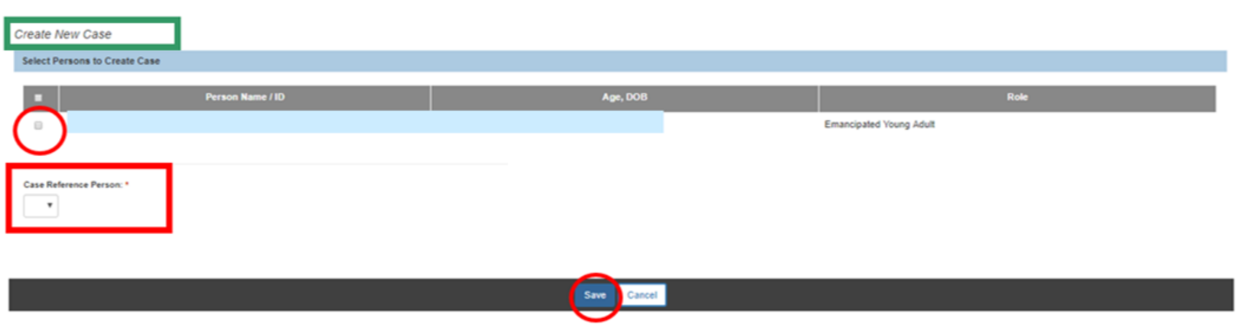


The **Create New Case** screen appears.

4. Place a checkmark in the checkbox beside the name of the appropriate individual(s) who should be members in the new case.

   Note: SACWIS checks all intake participants by default; you will need to remove the unnecessary checkmarks.

5. Select the Emancipated Young Adult from the **Case Reference Person** drop-down menu.
6. Click **Save**.



The **Intake Workload** screen appears, displaying a message that the intake has been linked to the new case.

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