

# **Adding a Service Review and Service Participation Status**



**Knowledge Base Article**

# Adding a Service Review and Service Participation Status

## Table of Contents

Overview .....	3
Navigating to the Case Review / SAR Screen .....	3
Adding the Service Review .....	6
Adding the Service Activity .....	9

# Adding a Service Review and Service Participation Status

## Overview

When completing a **Case Review** or **Semiannual Administrative Review (SAR)**, a **Service Review** and **Service Participation Status** are required in Ohio SACWIS. To add each of those, complete the following steps:

## Navigating to the Case Review / SAR Screen

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

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

4. Click the **Review Tools** link in the **Navigation** menu.

The screenshot shows the Ohio SACWIS interface. At the top, there is a navigation bar with tabs: Home, Intake, Case (selected), Provider, Financial, and Administration. Below this is a sub-navigation bar with 'Workload' (highlighted), Court Calendar, and Placement Requests. On the left is a vertical navigation menu with various links, including 'Review Tools' (highlighted). The main content area shows case details for 'Adoption Open (11/21/2022)'. Fields include: CASE NAME / ID: Sacwis, Susie / 123456; ADDRESS: 123 Test Rd, Test, Oh 12345; CONTACT: (empty); AGENCY: Test County Children Services Board; PRIMARY WORKER: Test, Worker; SUPERVISOR(S): Test, Supervisor. Below the case details is a 'Case Actions' section with links like 'View Member Details', 'Access Original Case', etc. At the bottom of the main content area is another navigation bar with 'Action Items', 'Case Alerts', 'Dashboard', and 'Assignments / Eligibility'.

The **Review Tools Filter Criteria** screen appears displaying the **Review Tools** section below it.

## Adding a Service Review and Service Participation Status

5. Select **Family Case Plan** from the **Plan Type** drop-down menu.
6. Make a selection from the **Review Tool** drop-down menu.
7. Click the **Add Review** button.

**Review Tools Filter Criteria**

Review Tool:

Agency:

Approved Date:  -

From Date To Date

**Review Tools**

Plan Type:  Review Tool:

	Review Tool	Status	Approved Date	Plan Name	Agency	
<a href="#">view</a>	Semiannual Administrative Review	<a href="#">Approved</a>	05/04/2023	Initial Nov 20, 2022	Test County Children Services Board	
<a href="#">view</a>	Case Review	<a href="#">Approved</a>	05/03/2023	Initial Nov 20, 2022	Test County Children Services Board	

Plan Type:  Review Tool:

The **Family Case Plan Information** screen appears.

8. Click the **Select Family Case Plan** button.

REVIEW TOOL: *Case Review* REVIEW FOR PLAN: STATUS: *In progress*

**Case Review Topics** < **Family Case Plan Information**

[Members to the Review](#) (MR) *No Family Case Plan has been selected.*

[Safety Reassessment](#) (SR)

[Strengths and Needs Assessment](#) (SN)

[Concern Review](#) (CR)

[Visitation](#) (V)

[Risk Reassessment](#) (RR)

[Case Analysis](#) (CA)

[Approval](#) (A)

## Adding a Service Review and Service Participation Status

The **Available Family Case Plans** screen appears.

9. Click the **Select** button for the appropriate plan.

Available Family Case Plans					
	Plan Name	Plan Number	Plan Type	Effective Date	Agency
<a href="#">select</a>	Initial Nov 20, 2022	1.00	Adoption Family Case Plan Status: <a href="#">Approved</a>	11/21/2022 - Approved	Test County Children Services Board

The **Family Case Plan Information** screen appears displaying a number in the **Plan Name** field as shown below.

10. Click the **Apply** button.

**Case Review Topics**

- Members to the Review** (MR) Not Completed
- Strengths and Needs Assessment** (SN) Not Completed
- Concern Review** (CR) Not Completed
- Visitation** (V) Not Completed
- Case Analysis** (CA) Not Completed
- Approval** (A)

**Family Case Plan Information**

Plan Type: Adoption Family Case Plan  
Effective Date: 11/21/2022 - Approved

Plan Name: **Initial Nov 20, 2022 (1.00)**  
Last Case Review Date: 05/03/2023

Plan Developed By: Test County Children Services Board

Review Event: 05/11/2022-Placement

**Child(ren) in the Case Review**

Sacwis, Susie - Female Age 14, DOB 07/03/2009

Protected under ICWA: No  
Court Case Number:

Child Location: No Placement  
Court ID Number:

Agency Legal Status: Permanent Custody

Child's Permanent Court Case: Adoption

[Previous Topic](#) [Next Topic](#) [Apply](#) [Save](#) [Cancel](#)

The **Case Review Topics** screen appears with a message that your data has been saved.

# Adding a Service Review and Service Participation Status

## Adding the Service Review

1. Click the **Case Services** link on the side navigation bar.

Case Overview  
Activity Log  
Attorney Communication  
Intake List  
Forms/Notices  
Substance Abuse Screening  
Ongoing Case All  
Specialized All Tool  
Law Enforcement  
Justification/Waiver  
**Case Services**  
Legal Actions  
Legal Custody/Status  
Living Arrangement /  
Guardianship

CASE NAME / ID: **Adoption**  
Sacwis, Susie / 123456 Open (11/21/2022)

Review Tools Filter Criteria

Review Tool: [dropdown]  
Agency: [dropdown: Test County Children Services Board]

Approved Date:  
From Date [calendar] - To Date [calendar]

Filter

The **Case Services Filter Criteria** screen appears.

### Important:

- To approve the work item, a service review must be completed for every service that is not end dated.
- The service review date must fall within the current Case Review period.

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

Case Services Filter Criteria

From Effective Date: [calendar] To Effective Date: [calendar]  
Case Member: [dropdown] Status: [dropdown]  
Service Category: [dropdown] Service Type: [dropdown]  
Service Goal: [dropdown] Service: [dropdown]  
End-dated services:  Exclude  Include Linked Status: [dropdown]  
Sort Results By: [dropdown]  Current Case Episode  View Historical

Filter Clear Form

Case Services

Service: [dropdown] Add Case Services

Result(s) 1 to 2 of 2 / Page 1 of 1

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	Type
<a href="#">edit</a>	Sacwis, Susie	Education & Training/After School Services	Case Member	09/19/2023 -	<a href="#">delete</a> <a href="#">service_end</a> Not Linked
Case Member / Caregiver / Caretaker History					
<a href="#">edit</a>	Sacwis, Susie	Counseling/Family Counseling	Case Member	09/19/2023 -	<a href="#">delete</a> <a href="#">service_end</a> Not Linked
Case Member / Caregiver / Caretaker History					

## Adding a Service Review and Service Participation Status

The **Service Information** screen appears.

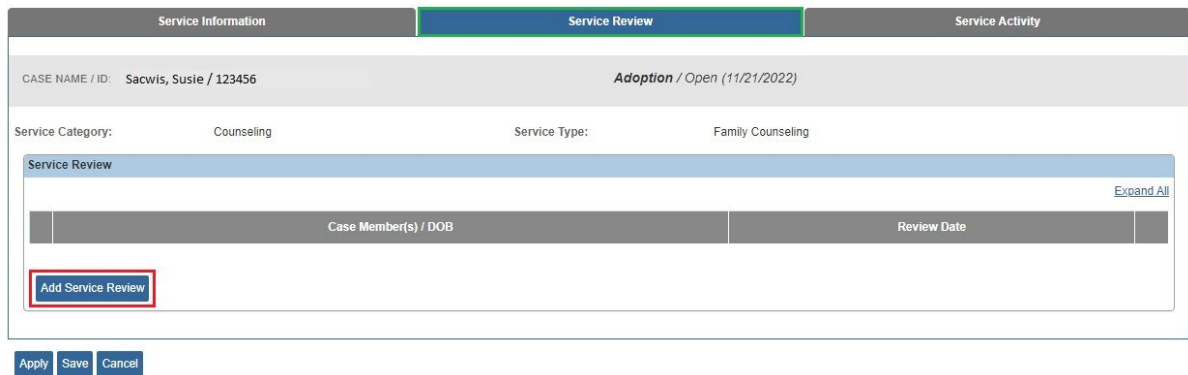
3. Click the **Service Review** tab.



The screenshot shows a web interface with three tabs: "Service Information", "Service Review", and "Service Activity". The "Service Review" tab is highlighted with a red border. Below the tabs, the case name is "Sacwis, Susie / 123456" and the status is "Adoption / Open (11/21/2022)". Under the "Service Information" section, the agency is "Test County Children Services Board" and risk contributors are "None".

The **Service Review** screen appears.

4. Click the **Add Service Review** button.



The screenshot shows the "Service Review" tab selected. It displays "Service Category: Counseling" and "Service Type: Family Counseling". Below this is a table with columns "Case Member(s) / DOB" and "Review Date". An "Add Service Review" button is highlighted with a red box. At the bottom, there are "Apply", "Save", and "Cancel" buttons.

The **Service/Activity Review Details** screen appears.

5. In the **Review Date** field, verify the date is correct.

**Note:** The **Review Date** field populates with the current date but can be changed to a prior date.

6. Click the **Check Box** next to the appropriate case member.
7. Select the appropriate **Service Recommendation** (Required) from the drop-down list.
8. Select the appropriate **Participation Status** field from the drop-down list.

## Adding a Service Review and Service Participation Status

**Important:** Based on the **Service Category** selected, the system will determine if the **Participation Status** drop-down field is required. The **Service Participation Status** is required for the following service categories: **Child Care, Counseling, Diagnostic, Education/Training, and Mental Health.**

9. If a barrier exists, select the appropriate type in the **Barrier Type** field.

10. If a **Barrier Type** is selected, complete the **Barrier Comments** field (Required).

The screenshot shows the 'Service/Activity Review Details' form. The 'Review Information' section includes a 'Review Date' field set to 10/04/2023. Below this is a table with the following columns: Case Member(s) / DOB, Service Recommendation, Participation Status, and Barrier Type. The first row of the table is highlighted with a red box and contains the following data: a checked checkbox, 'Sacwis, Susie - 07/03/2009', a dropdown menu, another dropdown menu, and a third dropdown menu.

11. If needed, complete the **Recommendation Comments** field (not required).

12. If needed, complete the **Participation Comments** field (not required).

13. Click the **Save** button.

The screenshot shows three comment fields: 'Recommendation Comments:', 'Participation Comments:', and 'Barrier Comments:'. Each field is a large text area with a 'Spell Check' button, a 'Clear' button, and a '2000' character limit indicator. The 'Save' button is highlighted with a red box at the bottom left of the form.

The **Service Review** screen appears displaying a message that your data has been saved as shown below.



# Adding a Service Review and Service Participation Status

## Adding the Service Activity

1. Click the **Service Activity** tab.

The screenshot shows a web application interface with three tabs: "Service Information", "Service Review", and "Service Activity". The "Service Activity" tab is highlighted with a red border. Below the tabs, the case information is displayed: "CASE NAME / ID: Sacwis, Susie / 123456" and "Adoption / Open (11/21/2022)". Below this, the "Service Category" is "Counseling" and the "Service Type" is "Family Counseling".

The **Service Activity Filter Criteria** screen appears.

2. In the **Case Service Participant** field at the bottom of the screen, select the appropriate case member.
3. In the **Activity Start Date** field, select the appropriate date.

**Important:** The date must be current or in the past, not a future date, and must fall within the current Case Review period.

4. Click the **Add Service Activity** button.

The screenshot shows the "Add Service Activity" screen. It features a "Service Activity Filter Criteria" section with a "Case Service Participant" dropdown menu, "Activity From Date" and "Activity To Date" date pickers, and a "Filter" button. Below this is a "Service Activity Results" section showing "Result(s) 0 / Page 0 of 0". At the bottom, there is a "Case Service Participant\*" dropdown menu, an "Activity Start Date:" date picker, and an "Add Service Activity" button. A red box highlights the "Case Service Participant\*" dropdown, the "Activity Start Date:" date picker, and the "Add Service Activity" button.

The **Add Service Activity** screen appears.

## Adding a Service Review and Service Participation Status

5. Complete the **Calendar Information** by selecting **Attended** or **Not Attended** from the drop-down fields (not required).
6. When complete, click the **Save** button.

**Add Service Activity**

Case Service Participant: Sacwis, Susie      Participation Status:

Activity Start Date: 10/04/2023      Activity End Date:

Comments:

Spell Check   Clear   2000

Sun	Mon	Tue	Wed	Thur	Fri	Sat
1	2	3	4 <input type="text"/>	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Apply   **Save**   Cancel

The **Service Activity Filter Criteria** screen appears displaying a message that your data has been saved and information in the **Service Activity Results** section.

7. Click the **Save** button again.

**Service Activity Filter Criteria**

Case Service Participant:

Activity From Date:       Activity To Date:

Filter

**Service Activity Results**

Result(s) 1 to 2 of 2 / Page 1 of 1

Activity Start Date	Activity End Date	Case Service Participant
<a href="#">edit</a> 10/04/2023		Sacwis, Susie - 07/03/2009 <a href="#">delete</a>

Case Service Participant\*       Activity Start Date:\*       Add Service Activity

Apply   **Save**   Cancel

The record is Saved.

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at [sacwis\\_help\\_desk@childrenandyouth.ohio.gov](mailto:sacwis_help_desk@childrenandyouth.ohio.gov).