

Knowledge Base Article

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Overview

This article describes steps for the entire case transfer process, including procedures for both the **Transferring Agency** and the **Receiving Agency**.

Important: Although the case transfer process in Ohio SACWIS has improved system usability and streamlined business procedures, best practice encourages both the **Transferring Agency** and the **Receiving Agency** to maintain a high-level of communication throughout the entire case transfer process.

To provide some background, Ohio SACWIS functionality now improves the case transfer process by making it more consistent with Policy's requirements, as well as reducing the manual tasks required to transfer a case.

Some system-enhancement examples are as follows:

- You will no longer be required to manually end-date the child's specific court ordered transfers for their:
 - Associated legal status record
 - Eligibility record
 - Reimbursability record
 - Placement record
- Agencies can now use Ohio SACWIS to "switch ownership" of child-based work items on cases that have a current agency legal status of Active and are owned by the Transferring Agency for an active case member. Child-based work items are considered to be "switched" when the Court Ruling record for Court Jurisdiction Transfer (initiated by the Transferring Agency) has its Court Acceptance Date recorded in Ohio SACWIS (by the Receiving Agency) prior to the actual case transfer.
- A Receiving Agency can accept a case transfer request from a Transferring Agency (or return it for rework) and Ohio SACWIS records the transactions between the two agencies.
- Ohio SACWIS automatically notifies the Receiving Agency about upcoming potential case transfers



Recording a Court Motion

To transfer a case, the court motion that documents the request must first be recorded in Ohio SACWIS. To do so, the **Transferring Agency** will complete these steps for **court-ordered cases only**:

Navigating to the Legal Actions 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 to navigate to the **Case Overview** screen.

4. Click the Legal Actions link in the Navigation menu.

Home	Intake	Case	Provider	Financial	Administration
Workload Court Calendar	Placement Requests				
\leftrightarrow					
Case Overview					
Activity Log	CASE NAME / ID:	01	going		HAZARD
Attorney Communication		Op	len		
Intake List	ADDOCCE.		NTACT		
Safety Assessment	ADDRESS.		NIACE		
Substance Abuse Screening					
Eorms/Notices	AGENCY				
Category/Pathway Switch					
Safety Plan	PRIMARY WORKER	SU	PERVISOR(S):		
Actuarial Risk Assessment					
Eamity Assessment					
Ongoing Case A/I	Case Actions				
Specialized A/I Tool					
Law Enforcement	View Case Information 0 Linked Cases	Program Categories. Case Status Histor	l.		
Justification/Waiver					
Case Services	Case members have unspecified	elationships.			
Legal Actions					
Legal Custody/Status					
Child Support Information	Hazards				
Living Arrangement / Guardianship					
Placement Request	Person / Address			Hazard Type	
Placement Request					
Listensin Kova					

The Legal Actions screen appears.



Recording the Motion

The Transferring Agency will complete the following steps:

1. Click Maintain Legal Action for the participant

Home	Intake	Case	Provider	Financial	Administration
Workload Court Calendar	Placement Requests				
<>					
Case Overview					
Activity Log	CASE NAME / ID		Ongoing		HAZARD
Attorney Communication			Open		
Intake List					
Safety Assessment	Case Legal Actions / Delinquency Partic	ipants Filter Criteria			
Substance Abuse Screening	O All Persons Persons Under Age 2	2			
Eorms/Notices					
Category/Pathway Switch	Filter				
Safety Plan					
Actuarial Risk Assessment	Case Legal Actions / Delinguency Partic	ipants			
Eamily Assessment	Result(s) 1 to 3 of 3 / Page 1 of 1				
Ongoing Case A/I	Case Participants	DOF	a		
Specialized A/I Tool					
Law Enforcement			Maintain Legal Action	Maintain Delin	auency
Justification/Warver			Maintain Legal Action	Maintain Delin	quency
Lass Services			Maintain Legal Action	Maintain Delin	quency
Lenal Custoria/Status					
Child Support Information					
Living Arrangement / Guardianship					
Initial Removal					
Placement Request					
Placement/ICCA					

- 2. In the Legal Action field, select Record Motion.
- 3. Click the Add Action button.

CASE NAME / ID			Ongoin	g /			
Name:		Person ID	e	DOB:			
Participant Legal Action	n Filter Criteria						
Current Episode	View Historical	Created In	a Error: Exclude Include				
Filtor							
Participant Legal Action	n Information						
Legal Action:		🗸 🖌 Add Lega	al Action and Grouping				Expand All
8	Legal Actions Group Beginning with a Hea	ring		Effective Date:			
Legal Action Informa	tion						
	Date Legal Action	ту	pe	Additional Info	Court Info	Created in Error	Move
edit V302	Ruling	Review	Rulings Received: Bes Parent/Guardian/Custo Agency Legal Status: /	st Interest, Court Ordered Protective Supervision, Custody to odian, RE to Prevent Removal - Initial Court Ordered Protective Supervision			
edit copy	Hearing .	Review	Hearing Status: Held Reason Hearing Not H	feld.			
edit copy	Hearing	Review	Hearing Status: Held Reason Hearing Not H	ield.			
edit copy	Hearing	Disposition	Hearing Status: Held Reason Hearing Not H	ield.			
edit COEX	Hearing	Shelter Care	Hearing Status: Held Reason Hearing Not H	ield:			
Legal Action:	Record Motion	~ Add Act	on				



The Record Motion Details screen appears.

- 4. In the **Date Submitted** field, enter the appropriate date.
- 5. In the **Court Name** field, select the Sending Court name.
- 6. In the **Motion Filed By** field, click the **Search Person** button to locate the person who filed the motion.

CARGE OF BRITE OF LEVELON							
Court Information							
Action Participant: *			Court ID Number:				
			Court Case Numb	Hert			
Date Submitted:"	#						
File Stamp Date:							
Court Name: *	(v)	Judge/Magistrate:		~		
Court Address:			County:				
Motion Filed By:	Sea	ich Person					
Notion Filed By: Reason for Ending Motion:	Available Motion Types:	rch Person	Selected Motion Types	s: *			
lation Filed By: leason for Ending Motion:	Available Motion Types:	Add	Selected Motion Types	s:* Q			
totion Filed By: leason for Ending Motion:	Available Motion Types:	Add Add	Selected Motion Types	s: * Q			
lotion Filed By: leason for Ending Motion:	Available Motion Types:	Adi Pennan	Selected Motion Types	s:* Q			
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lation Filed By:	Available Motion Types: Q Annual Court Review (ACR) Armended Motion Annual Review (CRizen Review B Appointment for GAL Case Plan Review	Add Demon	Selected Motion Types	s: ' Q			
lotion Filed By:	Available Motion Types: Q Annual Court Review (ACR) Annual Review (CRIzen Review B Appointment for GAL Case Pass Review Child Support	Add	Selected Motion Types	s.* Q			
lotion Filed By:	Available Motion Types: Q Annual Court Review (ACR) Annual Review (CRizen Review B Appointment for GAL Case Plan Review Child's testimony to be videotape	Add ocard)	Selected Motion Types	s." Q			

The Person Search Criteria screen appears.

- 7. Complete the filter fields, as needed.
- 8. Click the **Search** button. The filtered results appear in the **Person Search Results** section of the screen.



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

Search For Person								
Person (D:	~ OR ~	SSN:						
Note: If Person ID or SSN are entered, all other search criteria will be ignored								
	OR							
Last Name: First Name: Middle Name:		Gender:						
	~ OR ~	Age Range: 						
Reference. TCN, and Address Criteria.								
Search Clear Form Return								
Person Search Results								
Result(s) to 1 of 1 / Page 1 of 1 Include only active case members								
Person Name / ID Select Union	Address own Address	Gender	(Age) DOB	Active Case				

The **Record Motion Details** screen appears displaying the selected name in the **Motion Filed By** field.

- 10. In the Available Motion Types field, choose Court Jurisdiction Transfer.
- 11. In the **Receiving Agency** field, select the Receiving Agency's name (required to save the record).
- 12. In the Method of Motion field, select Written or Oral.
- 13. Complete the **Motion Narrative** field as needed.
- 14. Select the Preferred Primary Disposition/Outcome.



Record Motion Details			
Court information			
Action Participant: 1		Court ID Number:	
		Court Case Number:	*
Data Submitted."			
File Stamp Cate:			
Court Name *		Audow-Macostrate	
Court Address:		County:	0
Motion Filed By:	Sauch Parson		
Reason for Ending Motion:			
	Available Moton Types:	Selected Motion Types: "	
	a All	Associate Cal	
	Annual Court Review (ACR)	Court Jurisdiction Transfer	
	Amended Notion		
	Annual Review (Otizen Review Board)		
	Appointment for GAL		
	Case Plan Review		
	Child Support		
	Child's testimony to be videotaped		
	Contempt		
Sub-Typei			
Receiving Agency:	×		
Supervisor Approval Date			
Method of Motion:"	~	Motion Supported by Athdavit:	
Motion Namative:			
	PROPERTY AND DESCRIPTION		A
	Spel Credit Crear 1999		
Preferred Disposition/Outcome			
Preserved Primary Disposition/Outcome."	~		
Preserved secondary unsposition/Unicome.	v		
Mother's Attorney:	Search Penor	Mother's Guardian Ad Liters:	Search Person
Father's Attorney:		Father's Guardian Ad Litem:	
			Status Percen
United 5 Accountry.	Search Person		
Guardian Ad Liters:	Bearch Person		
Lay Guardian Ad Litem:	Search Person		
Casa			
	Scarch Person		

Saving the Motion

1. When complete, click the **Save** button on the **Record Motion Details** screen.

Preferred Disposition/Outcome			
Preferred Primary Disposition/Outcome:*	(v)		
Preferred Secondary Disposition/Outcome:	(v)		
Mother's Attorney:	Search Person	Nother's Guardian Ad Litem: Deardi Person	
Father's Attorney:	Search Person	Fether's Guardian Ad Litem: Seatch Person	
Child's Attorney:	Search Person		
Guardian Ad Litam:	Search Person		
Lay Guardian Ad Liten:	Search Person		
GABA:	Search Person		
Invalled Date:		Created By:	
lodified Date:		Modified By:	
Save Cascot			

The **Legal Actions** screen appears displaying a message that your data has been saved. The new information appears in the **Legal Actions** grid section. The **Type** column displays as **Court Jurisdiction Transfer**.



O Your data has been saved						×
CASE NAME TID		Ongoing /				
Name:	Person ID:		DOB			
Participant Legal Action Filter Onteria				155		P
Current Episode 🗇 View Historical	Created in Error: # Exclude 🔿 Include					
rase .						
Participant Legal Action Information						
Legal Action:	Add Legal Action and Grouping					Distanci All
U Legal Actions Group Beginning with a Ruling		Effective Cate:	03/28/3	023		
Legal Action Information						
Date Legal Action	Type	Additional links		Court linto	Created in Error Mc	
edil 06/81/0923 Multion	Court Jurisdiction Transfer	Prekened Primary Disposition: Court Jurisdiction Transfer			c	D.
LINK arrand						
atti 1978						
Legal Amor:	⊷ Aut.Action					
				100	er Legal Action(t)	
Date						

After saving a court motion, Ohio SACWIS automatically sends the following email notification to all **Receiving Agency** personnel (who have a security role of **Case Transfer Administrator**) to notify them about the request to transfer this case.



Recording a Court Jurisdiction Ruling Record

After recording the motion on a court-involved case, the Transferring Agency will record a **Court Jurisdiction Ruling Record** (also called a **Ruling Record**) to document the Court Jurisdiction Transfer.

However, the Ruling Record must meet the following criteria: A ruling type of **Court Jurisdiction Transfer** and the associated **Court Jurisdiction Transfer** record must be recorded in Ohio SACWIS for **each** active case member with an **Active** legal status.

To record a Ruling Record, complete the following steps:



- 1. Navigate to the Legal Actions Filter Criteria (Legal Actions) screen using the steps discussed in the previous section.
- 2. In the Legal Action field, select Record Ruling.
- 3. Click the **Add Action** button.

CASE NAME / ID				Ongoing /			
Norre:			Person ID:		008:		
Participant Legal	Action Filter Onterta						
Current Episor	de 🔿 Wew Historical		Created in Error: * Exclude O Inc	2ude			
Filler							
Participant Legal	Action Information						
Legal Action:			Add Legal Action and Geouping				Expand A
я	Legal Action	s Group Beginning with a Ruling		Effective Date:	63/28	9809	
Legal Action In	normation						
	Cute	Legal Action	Type	Additional Info		Court Info	Created in Error Move
att 05	91003	Motion	Court Jurisdiction Transfer	Preferred Primary Disposition: Court JulicoticSon Transfer			
atend							
100							
Legal Action:	Record Ru	Ring	Add Action				
						140	we Logal Action(b)

The Ruling Information screen appears.

- 4. In the **Date of Ruling** field, select the appropriate date.
- 5. In the Ruling Type field, select Court Jurisdiction Transfer.
- 6. Complete the other fields, as needed, such as the **Ruling(s) Received** field.

Note: As shown in green, when the ruling type is **Court Jurisdiction Transfer**, the **Termination** link in the grid disappears and a note appears stating: **The legal status record** will be transferred to the Receiving Agency upon entry of Receiving Agency court acceptance date.



Ruling Information							
Date of Rulling." Action Participant." Court Name: Court Address:	[1644-0123])	m		Court Case Number: Court ID Number: Judge/Magistrate: County:	Gata		9 9
Ruling Type." Journalized Date:	Court-Jurisdic	tion Transfer	10	Last Modified Date:			
	Ruling(s) Received:		Sele	oted Rulings Received;			
Compativ	C, Adjusticated Univaly Adoption Final (and Alcohol and/or Drug (AOD) Tx Appointment for CAL Beat Streets Beat Streets Beat Streets Case Courre Child AVXCL > 30 fleys	44		anna 🔾			
Spel Check Clear	4000						
Legar Status Informat	600)		-				
Note: The legal status	is record will be transferred to the receiving agenc	y upon entry of receiving agency court acceptance	data.				
Temporary	Legal IX Curticity Pacement and Care	atus -	Effective		Termination Data	Termination Rasson	
Add Legal Status				-			

As discussed in the next section, the transfer details will then be added.



Recording Transfer Details

The Transferring Agency will complete the following steps:

- 1. Scroll to the bottom of the **Ruling Information** screen. (The steps to navigate to this screen are discussed in the previous section.)
- 2. Click the Associate Jurisdiction Transfer button.

Legal Status information					
Note: The legal status record will be tr	ransferred to the receiving agency upon entry of receiving agency court ac	ceptance date.			
	Legal Status	Effective Data	Termination Date	Termination Reason	
Temporary Costoty Placement	ant čas				
Add Legal Status					
<					
- Appeal Information					
Add Appeal / Objection					
Jurisdiction Transfer Information					
	Receiving Agency Name		Court Accep	otance Dote	
Associate Jurisdiction Transfer]				
Ruling has been Created in Error					
e Cancel					

The Transfer Details screen appears.

- 3. In the **Receiving Agency** field, select the appropriate agency.
- 4. Complete the other fields, as needed.

Important: The **Court Acceptance Date** field is disabled (unavailable) for the Transferring Agency.

5. Click the **OK** button.

a instantion Transfer information			-
singline Court Case Number:		leinatine Court ID:	
	v		
enting Agency: *	~		
eaving Court Information			
Sourt Acceptance Date:			
leceiving Court Case Number:		ceiving Court ID:	
burt Name:		dge Magistrale:	
Jourt Address.	6	uny.	
She Check Check Sheet			



The **Ruling Information** screen appears displaying the selected information in the **Jurisdiction Transfer Information** section.

6. Click the **Save** button at the bottom of the **Ruling Information** screen.

and the second se	Legid Status	Effective Date	Termination Date	Terminution Reason	
Temporary Custody/Placement and Ca					
Legal Status					
peal Information					
Appeal / Objection					
Iction Transfer Information					
					_
	Receiving Agency N	iana -		Court Acceptance Date	
County Children Services Board					

The **Legal Actions** screen appears displaying a message that the data has been saved. The new Ruling Record appears in the **Legal Actions** grid section.

Reminder: A **Court Jurisdiction Ruling Record** is required for each active case member with an **Active** legal status record.

O Your data has been	saved									×
CASE NAME / ID					Ongoing /					
Name:				Person ID:			DOB:			
Participant Legal Action F	litter Critteria									
Current Episode O Vi	ew Historical			Created in Error: # Exclu	de O thotude					
False Participant Legal Action In Legal Action:	domation		•)	Add (egal Action and Gro	(eq)					Ensing
	Legal Actions Group I	Beginning with a Hearing				Effective Date:		11/30/2021		
Legal Action Informatio										
	Data	Legal Action		Type		Additional into		Court in	to Created in Error	Move
edt 05/01/2023 12001	Ruling		Court Junsdiction T	arater	Putings Associated					0
all ¹										0

Adding a Case Transfer Record

The Transferring Agency will complete the following steps:

- 1. Navigate to the appropriate **Case Overview** screen using the steps previously discussed.
- 2. Click the Agency Case Transfer link at the bottom of the Navigation menu.



Department of Job and Family Services

Home	intake	Case	Provider	Financial	Administration
Workload Court Calendar Pl	acement Requests				
0					
Cere Domotom Actual Los Attures: Cummetication Inten Lint Softet: Accessment Softet: Accessment Softet: Accessment	CASE INVIEC / ED	Smarta	Orgoing		
Euron/Tutkan Category/Dathway Sockub Safehr, Dan Auturcha Flaik Association Factor Association	Case Legal Actions / Delinquency Participants				
Ongoing Celev.All Specialized All Tool	Result) 1 to 2 of 5 / Page 1 of 1 Case Participants	Doe			
Las: Entropement Justification/Valuer Const. Services			Marrian Loval Action Marrian Loval Action	Mehtan Deineven Mattian Deineven	x R
Legal Actions Lanal Custody/Status Child Support Information			Mandan Loud Adam	Wenter, Detrouen Menter, Detrouen	n N
Lhite Ananament : Guardianshis Initial Ramoval Placement Result			Marrian Lond Adam Marrian Lond Adam	Wartan, Delnouen	8
Placement/CCA Residential Insumer Information Independent Living					
Cases Plan Toolo Violoiton Plana Benimu Toolo					
Family, Team Meeting Safety, Resourcement Beautification, Assessment					
Cases Conference Note Harman Trafficilies Child Fatality/Note Fatality PERCENTION					
Adoption Case.Clouds					

The Case Transfer(s) screen appears.

Note: The **Case Transfer(s)** screen is comparable to the **Case Closure** screen in that both screen look similar and require equivalent steps to complete the approval process.

3. Click the Add Case Transfer button.

Home	Indake	Case	Provider	Financial	Administration
Workload Court Calendar Plac	cement Requests				
0					
Casa Overview			Gamping		
AdutyLog	LADIE NAME / N.I.		Unguing		
Maney Communication					
Interna Line					
Safety Assessment	Case Panster(s)				
Substance Alapse Screening					
FamaNotos	Add Case Transfer				
Category/Pathony Solid					
Satety, Plan					
Actuarial Risk Assessment					
Earnik Assessment					
Opening Case 44					

The Case Transfer Details screen appears.



- 4. In the **Receiving Agency** field, select the appropriate agency from the drop-down list.
- 5. In the **Case Transfer Reason** field, select the appropriate value. If the transfer was court-ordered, select **Court Ordered Transfer**.
- 6. Click the Link Activity button.

Important: To process the case transfer for approval, an activity must be linked in the **Case Transfer Summary Information** section of the screen.

Case > Workload > Case Transfer							
CASE NAME / D	Onge	sing /					
Cate Transfer Details							
Bending Agency: Case Transfer Effective Date:		Notes:					
Created Date:		Created By: Modelso Dir					
Receiving Agency." Cose Transfer Reason." Cost Online Interview	v) v						
Case Transfer Summary Information	Responsible Worker	Transfer Generative					
Ens Activity							
Additional Comments:							
Fjoll Cherr 2000 Note: System will only copy active approved non-recommended Panity Case Plans I Ca	Red Chess Cear 2000						
Validate for Approval Process for Approval							
and some							

The Activity Log screen appears.

- 7. If needed, enter search criteria in the Activity Log Filter Criteria fields.
- 8. Click the **Filter** button. The results appear in the **Activity Log** section.
- 9. Click the **Select** link in the appropriate row.



			Ungoing				
tivity Log Filter Critana					1		
Svity Prom Date:	m		Activity To Date:				
ise Category:							
entant Type:							
rtegory:	Cace Transfer	- 					
ib Category:	Case Transfer Summary	~					
stivity State:	Completed 🖌						
pency:		¥					
ther ther Form							
Assisted and 17 Page 1 of 1							
Rest Activity Data	Conto	t Type	Category	Sub Category	Created By	Activity State	Norrative
ting straighter	Deneral		Case Transfer	Case Yander Summary		Completed	•
						-	

The **Case Transfer Details** screen appears displaying the activity in the **Case Transfer Summary Information** section (grid) as shown on the next page.



10. When complete, click the **Save** button at the bottom of the **Case Transfer Details** screen.

Less > Workload > Case Transfer					
CASE NAME / ID			Ongoing /		
Case Transfer Details					
Sending Agency:					
Case Transfer Effective Date:	L			Status: in progenes	
Created Date:	05/01/2020 02:47:50 PM			Created By:	
Modified Data:	05/01/2023 02 47:50 PM			Modified By:	
Receiving Agency:"	County Children Services Board	v)			
Case Transfer Reason."	Court Ordenet Transfer 🔹				
Case Transfer Summary Information					
Act	ovty Data	Responsible Worker		Transfer Summary Narrobys	
ytta 0691003					100
Con a rate					
Territorial					
Additional Comments:					
Spel Creck Clear 2000					
Note: System will only copy active approv	ved non-recommended Family Case Plans / Case Plans,				
Validate for Approval Process for Approx					
Save 1 mon					

The **Case Transfer(s)** screen appears displaying a message that your data has been saved. As shown, the **Status** field displays **In Progress**.

Home	intake	Case	Provider	Financial	Administration
Workload Court Calendar Pt	acement Requests				
\odot					
Case Overview	O Your data has been changed				×
Adoby Log	Concession of the local division of the loca				
Atteney Communication	CASE NAME / ID		Ongoing		
Infahm Lini					
Safety Assessment					
Substance Alcone Screening	Case Transfer(s)				
Kernsflixtices					Results: 1 is 1 of 1 / Page 1 of 1
Category/Fathoras Solitch	AND DESCRIPTION OF TAXABLE PARTY.				
Safety Plan		and whench	Receiving Agency	Case Stander Effective D	10 10 10 10 10 10 10 10 10 10 10 10 10 1
Actuarial Risk Assessment	est County Department of 200 and Family Service	0es	County Children Bonizes Board		In programs cheater
Earth Assessment			_		
Otropho Case All					
Specialized Atl 3xd					
Lase Enforcement	Aust Came Transfer				
Justification/Vision:					
Casa Services					
LeastActors					



Entering the Court Acceptance Date

The Receiving Agency will locate the already existing Ruling Record(s) created by the Transferring Agency and then complete the following steps to record the Court Acceptance Date for each ruling that was recorded:

- 1. Navigate to the appropriate **Legal Actions** screen using the steps previously discussed.
- 2. Click the **Maintain Legal Action** for the correct Case Participant

Note: You can also navigate to the associated Court Ruling Record and enter the Court Acceptance Date there.

Home	Intake	Case	Provider	Financial	Administration
Workload Court Calendar Pla	cement Requests				
0					
Case,Charocher AchthyLop Metrore,Ceronomistation Heldense,Ceronomistation Heldense,Ceronomistation Satho,Danesand Satho,Dane Compose/Datase.South Satho,Dane Acharol Salk.Assessment Ecolo,Company	CATE MARK / 10 Case Legal Actions I Delinguncy Participants Part O All Persons ^{III} Persons Under Age 22 Eller Case Legal Actions J Delinguncy Participants	e Ortana	Congroing		
Ongoing Case All Specialized All Tool	Case Participants	000			
Lev Enforcement Justification/Weiver			MarsierLebellichter	Martial: Daimhan	n
Legal Actors			Marthan Leval Action	Maetait Deboam	D1
Child Sussest Information Links Accessment - Guardianship			Marten Level Actor	Martan Debsam Martan Debsam	8
hild famoul Facenet Recent Pacenet/CCA			Marriet Leost Action	Mairlan Dolman	D.

The Participant Legal Action screen appears.

3. Click the edit link for the Court Jurisdiction Transfer Ruling Record

CASE NAME (10				Ongoing /			
Name:			Person ID:		D08:		
Participant Legal Acti	ton Filter Criteria						
Current Episode	O View Historical		Created in Error: * Exclude O Include				
filter							
Participant Legal Acto	tion Information						
Legal Action:			 Attraction and Strategy 				1
н	Legal Act	ions Group Beginning with a Hearing		Effective Date:			
Legal Action Inform	mation	76					
	Date	Legal Action	Type	Additional Info		Court into	Created in Error M
RE 8/04/200	123	Rang	Court-Arméteten Transfer	Rulings Received.			
3828		Heating	Review	Hearing Status: Heat Reason Hearing Not Held			



The Ruling Information screen appears.

4. In the Jurisdiction Transfer Information section, click the edit link.

Jurisdiction Taxishe' Information	
Receiving Agency Name	Court Acceptance Cate
ntt Churty Children Service Based	
Ruling has been Created in Error	
Sawa Catroit	

The Transfer Details page appears.

Important: As previously stated, once this date is recorded, **the transfer is final and cannot be modified by anyone**.

- 5. In the **Court Acceptance Date**, select the correct date.
- 6. In the **Court Name** field, select the court name.
- 7. Click the **OK** button.

		Person id:		
	~	Originating Court ID:		
Services Board	~			
	¥	Receiving Court ID:		
	×.	Judge Magistrate		
		County:		
		County		
	Services Board	Services Boerd v	Parties ld: Parties ld: Grigosting Govit (b) Augusting Covit (b) Aug	Person IC Person IC Orginating Court ID Resaring Court ID Augustingistrate County:

The Ruling Information Screen appears.

8. Click the **Save** button.



e of Ruling."	(marrow) (Court Case Number	
	(MARCHAR)				
tion Participant."				Court ID Number:	
surt Name:				Judge-Magnitrate:	
urt Address:				County:	
ing Type."	Court Jurisdicti	ion Transfer		Last Modified Date: 05/01/2023	
mailand Date:		()			
	Ruling(s) Received:			Selected Rulings Received:	
	9	Att		Remote Q	
	Child Support - Health Insurance Terminated			Court Aurodiction Transfer	
	Committed to DVS				
	cops				
	COPS Extension				
	COPS/TCOPS Terminated				
	Court ordered Agards Agency recommendation	ion .			
	Custody Extension				
ments:					
6 Chock Close	4000				
nents: 66 Chock Gloar pal Status Informati	(4000)				
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The following validation message appears.

- 9. Verify (again) that the court acceptance date is correct.
- 10. If so, click the **OK** button.





As shown on the next page, a message appears that your data has been changed and the Court Acceptance Date appears in the **Date** field grid column.

Important: Once the Court Acceptance Date has been saved, the **Receiving Agency** now has responsibility for each child's:

- Legal Status
- Placement
- Eligibility
- Reimbursability
- Service Authorization

• Your data has been	n saved										×
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Refer to the next sub-section for additional changes on other Ohio SACWIS screens that occur after the Court Acceptance Date is entered.



Ohio SACWIS Screen Changes after Entering the Court Acceptance Date

Legal Custody Episode & Status Information Screen Changes

After entering the Court Acceptance Date, Ohio SACWIS automatically updates the following on the **Legal Custody Episode & Status Information** screen:

- The Transferring Agency's legal status record is terminated and the **Termination Reason** field displays **Custody to Another Agency**.
- A new grid row appears showing that the legal status ownership has switched from the **Transferring Agency** to the **Receiving Agency**.
- The Termination Date field displays the Court Acceptance Date.
- The Effective Date field in the new grid row now displays the Court Acceptance Date.

To view these changes on the **Legal Custody Episode & Status Information** screen, complete the following steps:

- 1. Navigate to the appropriate **Case Participants** screen using the steps previously discussed in this Knowledge Base Article.
- 2. Click the edit link. The Legal Custody and Status screen appears.

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Safety Reasonment					

The **Legal Custody Episode & Status Information** screen appears displaying a grid showing the child's legal status history.



Placement Record Screen Changes

After entering a Court Acceptance Date, Ohio SACWIS automatically updates specific items on the **Placement** screen.

- 1. To view this screen, navigate to the **Case Overview** screen using the steps previously discussed in this Knowledge Base Article.
- 2. Click the **Placement/ICCA** link in the **Navigation** menu. The **Placement Records** screen appears.

As shown in green, the system updates on this screen include:

- The **Transferring Agency's** placement record is end-dated with the court acceptance date.
- A new grid row appears displaying a draft placement record with the begin date as the court acceptance date.

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Service Information Screen Changes

After entering a Court Acceptance Date, Ohio SACWIS automatically creates a draft placement record. However, the **Receiving Agency** must navigate to the record and **complete the following steps** to link a provider:

Note: As discussed later, you may also need to refer to the **Managing Case Services** Knowledge Base Article to complete these steps.

- 1. Navigate to the **Case Overview** screen using the steps previously discussed.
- 2. Click the **Placement** link in the **Navigation** menu. The **Placement Records** screen appears.

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

The Service Information screen (also called the Placement screen) appears.



- 4. If applicable, complete the **applicable checkboxes in the Additional Placement** Information section.
- 5. In the **Does the child have a kinship relationship with the provider?** dropdown select **yes or no**
- 6. Click the Link Provider button.

Case / Workload / Placement/ICCA		
Placement Setting Information		
CASE NIGHT / ID	Ongoing /	
OHED NAME (12	AGE, DOB	AGENCY Downly Children Services Board
Placement Setting Details		
Modifying the Service Type, Begin Date, or Placement Type will remove the Provider		
Service Type: *	Begin Cute:	
Family Foster Home	05/01/2023	
Placement Type: *	Estimated End Date:	
Certified Foster Home 🔍		
Additional Placement Information		
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Provider: No Provider Inked		
Link Provider		
Status: *		

The Provider Information screen appears.

7. Link the appropriate provider using the steps in the **Managing Case Services** Knowledge Base Article.

After selecting a provider, the **Service Information** screen appears.

8. Click the Save button at the bottom of the Service Information screen.



Child Selection Screen Changes

When the Court Acceptance Date is entered in the Ruling Record, Ohio SACWIS automatically updates the **Child Selection** screen's **Program Eligibility** and **Program Reimbursability** sections. To view this screen, complete the following steps:

- 1. From the Ohio SACWIS Home screen, click the Financial tab.
- 2. Click the **Eligibility** tab.
- 3. Click the Eligibility / Reimbursability link. The Child Selection screen appears.
- 4. Type the person ID number in the **Person ID** field or use the **Person Search** button to locate the child.
- 5. Click the **Go** button.

Home	Intake	Case	Provider	Financial	Administration
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The **Child Selection** screen expands to display the **Program Eligibility** section and the **Program Reimbursability** section. As shown below:

- The **Program Eligibility** section shows the "switch" of legal responsibility to the **Receiving Agency**.
- In the Program Reimbursability section:
 - > The **End Date** field is dated one-day prior to the Court Acceptance Date.
 - A new (pending) row appears with the Effective Date field displaying the Court Acceptance Date.



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Service Authorization Summary Screen Changes

After entering a Court Acceptance Date, Ohio SACWIS automatically updates specific items on the **Service Authorization Summary** screen.

- 1. Navigate to the Ohio SACWIS Home screen using the steps previously discussed.
- 2. Click the **Placement** link in the **Navigation** menu. The **Placement Records** screen appears.
- 3. Click the Authorize link for the appropriate Completed placement record.

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Case Conference Note	Result(s) 1 to 9 of 9 / Page 1 of 1		
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Adaption	authority.	Company Cristian Deriver Company Actors	1
Casa Olivera			

The Service Authorization Summary screen appears.

When the court acceptance date is entered in the Ruling Record, Ohio SACWIS automatically updates the following on this screen:

- The **Transferring Agency's** service authorization record is end-dated with the Court Acceptance Date.
- A new grid row appears displaying the draft service authorization record with the **Begin Date** field displaying the Court Acceptance Date.

Note: The **Receiving Agency's** Service Authorization Administrator must update the pending service authorization with the appropriate service for the placement.



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Service Authorization Summary							
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Close							Generate Report
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Important: This concludes the **Receiving Agency's** process for completing the childspecific transfer for court involved work items. **However, this does not mean the case has been transferred.**

To complete the case transfer process, the **Transferring Agency** must meet all requirements for any outstanding work items. Then, the **Receiving Agency** is given the opportunity to review, reassign for re-work, and/or accept the transfer. More details about this are discussed in the next sub-sections.

Completing the Case Transfer Process (Transferring Agency)

To complete the case transfer, the **Transferring Agency** must complete the following steps:

- 1. Navigate to the **Case Overview** screen using the steps previously discussed in this Knowledge Base Article.
- 2. Click the **Agency Case Transfer** link in the **Navigation** menu. The **Case Transfer(s)** screen appears.
- 3. Click the Edit link on the existing In Progress transfer record.



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Residential Treatment Information					
Independent Living					
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Review Tools					
Family Team Meeting					
Safety Ressectored					
Reunification Assessment					
Case Conference Nate					
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Child Fatality/Neur Fatality					
KPC/CAMA					
Care Care a					
Agency Case Transfer					
100 C					

The Case Transfer Details screen appears.

The Transferring Agency will process the record for approval.

- 4. When complete, click the **Validate for Approval** button on the **Case Transfer Details** screen. The **Unresolved Items for Transfer** screen appears.
- 5. Complete any unresolved work items.
- 6. When work items are resolved, click the **Process for Approval** button.



Case = Workload = Case Transfer					
CASE NAME / ID			Ongoing /I		
Case Transfer Details	_				
Sending Agency.	County Department of Job and Pamily Bervices				
Case Transfer Effective Date:	20. C			Status: In progress	
Created Date:	05/01/2023 02:47:50 PM			Created By:	
Modified Date:	65/01/2023 02:51 25 PM			Modified By:	
Receiving Agency."	County Children Dervices Board	v]			
Case Transfer Reason:"	Coult Ordered Transfer				
Case Transfer Summary Information					
	otivity Data	Responsible Worker		Transfer Summary Nortabive	
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Additional Comments					
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Note: Bystem will only copy active appro	oved non-recommended Family Case Plans / Case Plans.				
Validate for Approval Process for Appro	well				
Save Caricel					

The Process Approval screen appears.

Important: The Ohio SACWIS case transfer functionality allows the Transferring Agency to:

• Route the case transfer record internally to the appropriate supervisor.

If the process within your agency requires a manager to review the case transfer record prior to sending it to your agency's transfer administrator, select your agency from the **Agency** field drop-down list. Then, choose the appropriate name in the **Reviewer / Approver** field.

Only agency employees who have the security of **Case Transfer Administrator** have the ability to route the case transfer to the Receiving Agency.

• Route the case transfer record directly to the Receiving Agency.

Only Receiving Agency employees who have the security of **Case Transfer Administrator** will populate the **Reviewer / Approver** field.



- 7. In the **Action** field, select the appropriate action.
- 8. In the **Agency** field, select the appropriate agency.
- 9. In the **Reviewers / Approvers** field, select the appropriate name.
- 10. When complete, click the **Save** button.

Home		Intake	Case	Provider	Financial	Administration	
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Reviewers/Ap	provers:		Please Select A Reviewer Approver 🥪				
Save Lancel			0.8	5 (A)			

Completing the Case Transfer Process (Receiving Agency)

To continue the case transfer process, the **Receiving Agency** will complete the following steps:

- 1. Navigate to the **Case Overview** screen using the steps discussed previously in this Knowledge Base Artile.
- 2. Click the Agency Case Transfer link in the Navigation menu. The Case Transfer(s) screen appears.
- 3. Click the edit link in the appropriate row.

Case Transfer(s)								
			Results) 1 to 1 of 17 Page 1 of 1					
Sending Agency	Receiving Agency	Case Transfer Effective Date	Status					
auty Department of Job and Family Services	County Children Services Board		Plending Approval					
Ant Care Turnin								

The Process Approval screen appears.



Important: Upon approval, the **Receiving Agency** will receive an email notification indicating that a work item has been routed to them.

- 4. View the information and/or comments as needed.
- 5. The **Receiving Agency's Transfer Administrator** will then navigate to the **Process Approvals** screen to review the case transfer record (following the same process as all Ohio SACWIS work items that are pending approval).
- 6. Once the case transfer record has been reviewed, the decision can be made to:
 - Decline for re-work, record comments, and then route the case transfer work item(s) back to the **Transferring Agency**. This process can continue for as long as needed.
 - Accept the case transfer record by final approving the work item(s).
- 7. Once accepted and approved, the **Transferring Agency's** assignments are end dated.
 - The **Receiving Agency Transfer Administrator** will be assigned to the case effective on the case transfer approval date (unless previously assigned during the court acceptance date process)
 - The **Case Status History** screen will create a new record to show when ownership of the case changed from the Transferring Agency to the Receiving Agency.
- 8. At the discretion of the **Receiving Agency Transfer Administrator**, the case can then be either reassigned or assigned as needed.

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at <u>SACWIS HELP DESK@jfs.ohio.gov</u>.

