

Creating a Child Recruitment Plan



Knowledge Base Article

Creating a Child Recruitment Plan

Table of Contents

- Overview 3
- Adding Activities to the Recruitment Plan 7
- Managing the Recruitment Plan 8
 - Adding What is Planned Activities 8
 - Adding Other Activities 10
 - Adding Activities Completed 13
- Generating a Child Recruitment Plan Report 17

Creating a Child Recruitment Plan

Overview

Important: A Child Recruitment Plan can only be created in an Adoption Case (from the navigation pane), thus only adoption case members can have a recruitment plan. A new recruitment plan can be created only for active adoption case members.

An adoption case member can have only one non-end dated recruitment plan at a time. If the child has a non-end dated recruitment plan (regardless of status), the Select Child for the Add Recruitment plan drop-down menu will not display the child's name. Listed below are the four types of Status that exist for a CRP:

In Progress:

- i. Default status when a new child recruitment plan is created (system derived)
- ii. User can only record What is Planned narrative
- iii. System allows deletion of Activities added to current plan.
- iv. User has selected all planned activities to be included in child recruitment plan and each activity has narrative for What is Planned
- v. Child recruitment Plan can be deleted

Active:

- i. At least one activity needed to mark child recruitment plan active. Validation message: "At least one Activity is needed to mark the Child Recruitment Plan as Active"
- ii. Ability to record What was Completed narrative (user selected)
- iii. Cannot delete Current Activities
- iv. Ability to edit What was Planned narrative text (not historical narrative)
- v. What is Planned is required for each activity added to recruitment plan (to mark the plan as Active Status). Validation message: "What is Planned narrative is required for each added Activity to mark the Recruitment Plan as Active"
- vi. Can add additional activities (Add Selected Activities to Current Plan and Add Other Activity buttons remain enabled)
- vii. The Add Details narrative box for What is planned and What is completed for identified Activity is enabled
- viii. End date is enabled
- ix. Created in error is enabled (if not linked to any work item)
- x. Cannot change effective date

Creating a Child Recruitment Plan

- xi. Cannot change status back to, In Progress; system will display only a Status of Active, Complete, and Close

Complete:

- i. User selected
- ii. All activities added to child recruitment plan must have at least one What is Completed narrative. Validation message: “All activities must have at least one What is Completed narrative to mark the Child Recruitment Plan as Complete”
- iii. Only end date is enabled

Closed:

- i. System derived when end date is recorded and saved
- ii. End date is required to mark status, Closed. Validation message: “End date is required to mark status Closed”
- iii. Option of Closed available only on Active and Complete Child recruitment plans
- iv. Not editable, except created in error rule below, and the State System Admin rules (Section 3 for business rules)

From the Ohio SACWIS home page:

1. Click the **Case** tab.
2. Click, **Workload**.
3. Click the case ID number of the appropriate adoption case.

The screenshot shows the Ohio SACWIS interface. At the top, there are navigation tabs: Home, Intake, Case, Provider, Financial, and Administration. The 'Case' tab is selected. Below this, there are sub-tabs: Workload, Court Calendar, and Placement Requests. The 'Workload' sub-tab is highlighted with a red box. Underneath, the 'Case Workload' section is visible. It features a 'Caseworker' dropdown menu, a 'Sort By' dropdown menu set to 'Case Name Ascending', and a 'Filter' button. A list of cases is displayed, with the case 'Sacwis, Susie [123456] - Open 11/21/2023 - Adoption' highlighted with a red box.

The **Case Overview** screen appears.

4. Click, **Child Recruitment**, in the navigation pane.

Creating a Child Recruitment Plan

Case Overview

[Activity Log](#)
[Attorney Communication](#)
[Intake List](#)
[Forms/Notices](#)
[Substance Abuse Screening](#)
[Ongoing Case A/I](#)
[Specialized A/I Tool](#)
[Law Enforcement](#)
[Justification/Waiver](#)
[Case Services](#)
[Legal Actions](#)
[Legal Custody/Status](#)
[Living Arrangement / Guardianship](#)
[Initial Removal](#)
[Potential Adoptive Families](#)
Child Recruitment

CASE NAME / ID: **Adoption**
Sacwis, Susie / 123456 *Open (11/21/2023)*

ADDRESS: 123 Test Rd
Test, Oh 12345

CONTACT:

AGENCY: *Test County Children Services Board*

PRIMARY WORKER: Test, Worker
[Assign Worker](#)

SUPERVISOR(S): Test, Supervisor

Case Actions

[View Member Details](#) | [Access Original Case](#) | [Program Categories](#) | [Case Status History](#) | [View Adoption Subsidies](#)

Action Items | **Case Alerts** | **Dashboard** | **Assignments / Eligibility**

The **Child Recruitment Planning Filter Criteria** screen appears.

1. Select a child's name from the **Select Child** drop-down menu in the **Child Recruitment Activities** grid.
2. Click the **Add Child Recruitment Plan** button (the button becomes active when a child's name is selected).

Child Recruitment Planning Filter Criteria

Effective Date: * - Child Name:

From Date To Date

Include Created in Error

Filter

Child Recruitment Activities

Result(s) 0 / Page 0 of 0

Recruitment Plan ID	Child Name / ID	Effective Date	End Date	Status	Linked
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Select Child: **Add Child Recruitment Plan**

Creating a Child Recruitment Plan

In the **Status** column of the **Child Recruitment Activities** grid, is a list of Child Recruitment Plans in various stages of completion.

Child Recruitment Planning Filter Criteria

Effective Date: * - Child Name:

From Date To Date

Include Created in Error

[Filter](#)

Child Recruitment Activities

Result(s) 1 to 3 of 3 / Page 1 of 1

	Recruitment Plan ID	Child Name / ID	Effective Date	End Date	Status	Linked	
edit			08/03/2018		Active		
edit			08/02/2018	08/02/2018	Closed		
edit			07/27/2018	08/02/2018	Complete		

Converted cases will also be listed in the **Child Recruitment Activities** grid, displaying a **CONVERTED** badge (see graphic below).

Note: The converted cases are display only and cannot be copied, deleted, or modified in any way.

Child Recruitment Activities

Result(s) 1 to 5 of 5 / Page 1 of 1

	Recruitment Plan ID	Child Name / ID	Effective Date	End Date	Status	Linked	
view	121212	Sacwis, Susie 123456	03/30/2007	10/16/2018	Closed		
view	131313	Duck, Daffy	03/30/2007	10/16/2018	Closed		
view		Duck, Daffy	03/30/2007	10/16/2018	Closed		
view		Duck, Daffy	03/30/2007	10/16/2018	Closed		

Creating a Child Recruitment Plan

The **Linked** column lets a user know whether or not a Child Recruitment Plan has been linked to a Matching Conference record or a Pre-Adoptive Staffing record. The graphic below shows the Child Recruitment Plan is linked to a **Matching Conference**.

Note: A Child Recruitment Plan can be linked to only one work item.

The screenshot shows two sections of a web application. The top section, titled "Child Recruitment Planning Filter Criteria", includes fields for "Effective Date" (with "From Date" and "To Date" sub-labels), a "Child Name" dropdown, an "Include Created in Error" checkbox, and a "Filter" button. The bottom section, titled "Child Recruitment Activities", displays a table with the following data:

Recruitment Plan ID	Child Name / ID	Effective Date	End Date	Status	Linked
1011		07/05/2018		Active	Matching Conference(s)
1012		07/05/2018		In Progress	

Below the table, there is a "Select Child" dropdown menu and an "Add Child Recruitment Plan" button.

The **Manage Recruitment Plan** screen appears.

Adding Activities to the Recruitment Plan

1. Enter a date in the **Effective Date** box.

Note: The Effective Date cannot be a future date. Additionally, the effective date cannot overlap an existing CRP.

2. Click the **Add Activities to Current Plan** link (the screen will expand, displaying a pre-set list of recruitment activities).
3. Place a checkmark in the box beside each activity you want to add to the recruitment plan.
4. Click the, **Add Selected Activities To Current Plan** button.

Note: At least one activity is required to save the Child Recruitment Plan as Active.

Creating a Child Recruitment Plan

The **Manage Recruitment Plan** screen appears, displaying the added activities in the **Current Activities** grid.

Manage Recruitment Plan

Child Recruitment Plan Summary

Effective Date: 11/15/2018

Add Activities to Current Plan

Activity	Planned	Completed
edit Review the case file for relatives/kin		
edit Radio/Television/Media		

Managing the Recruitment Plan

Adding What is Planned Activities

Note: What is Planned: These are activities the worker/team is planning to do, for example, make a call to a relative and attend an adoption fair.

1. Click, **edit** beside the appropriate activity.

Child Recruitment Plan Summary

Effective Date: 01/23/2024

End Date:

Add Activities to Current Plan

Current Activities

Activity	Planned	Completed
edit Register the child's profile on...	02/08/2024 : Test Narrative	

The **Maintain Activity** screen appears.

2. Enter narrative in the **What is Planned** text box.

Note: You must click edit and enter What is Planned narrative for each activity you have listed in order to mark the Status as Active.

Creating a Child Recruitment Plan

Note: Even in Active status, the worker can continue to add narrative to What is Planned and What is Completed; additionally, the worker can choose to add another activity to the current plan.

3. Click, **Save**.

Maintain Activity

CASE NAME / ID: **Test, Adult / 121212** Adoption / Open (09/21/2022)

CHILD NAME: Sacwis, Susie / 123456 DOB: 02/16/2023

Activity Description & Details

Activity: Register the child's profile on...

What is Planned

Add Details: [\(expand full screen\)](#)

Test Narrative

02/08/2024 11:32 AM - **Test, Worker**
will remain listed on the agencies website for recruitment purposes.

What is Completed

Complete at least one of the following:

Save Cancel

The **Manage Recruitment Plan** screen appears, displaying the added activity(ies).

4. Click, **edit**, beside an activity to display the date and time it was created, and the name of the user who created the activity.

Manage Recruitment Plan

Case Name / ID: Adoption / Open (10/1/2013)

Your data has been saved.

Child Recruitment Plan Summary

Effective Date: 11/05/2018

Add Activities to Current Plan

Current Activities

Activity	Planned	Completed
add Review the case file for relatives/kin	11/05/2018 : Test Narrative	
add Radio/Television/Media	11/05/2018 : Test Narrative	

Creating a Child Recruitment Plan

The **Maintain Activity** screen appears, displaying the date, time, and name of the person who added the activity.

Activity Description & Details

What is Planned

Add Details: [\(expand full screen\)](#)

Test Narrative

✓ ABC

3986

02/08/2024 11:32 AM - Test, Worker

will remain listed on the agencies website for recruitment purposes.

Adding Other Activities

Note: Adding other activity(ies) is an optional feature; it is necessary if the worker/team will be doing a specific activity that is not part of the pre-set list of activities.

1. Click, **Add Activities to Current Plan.**

Manage Recruitment Plan

CASE NAME / ID: Test, Adult / 121212

Adoption / Open (09/21/2022)

CHILD NAME: Sacwis, Susie / 123456

DOB: 02/16/2023

Child Recruitment Plan Summary

Effective Date: *

01/23/2024



-

End Date:



[Add Activities to Current Plan](#) ▾



Current Activities

	Activity	Planned	Completed
edit	Register the child's profile on...	02/08/2024 : will remain listed on the agencies website for recruitment purposes....	

Creating a Child Recruitment Plan

2. Select **Add 'Other' Activity** from the expanded list of activities.

Child Recruitment Plan Summary

Effective Date: * 01/23/2024  - End Date: 

Add Activities to Current Plan ^

- Review the case file for relatives/kin
- Register the child's profile on... *(added to plan)*
- Talk with current / previous caregiver about interest in adopting child
- Talk with the child about anyone who may be willing to provide a permanent home for the child
- Distribution of information about the child to other adoption agencies
- Internet/Social Media Searches
- Flyers/Brochures
- Adoption Fair/Mixer
- Radio/Television/Media
- Participation in Recruitment Event(s)

Add Selected Activities To Current Plan **Add 'Other' Activity**

The **Maintain Activity** screen appears.

3. Enter the name of the activity in the **Other Activity Name** text box.
4. Enter narrative in the **What is Planned** grid.
5. Click, **Save**.

Maintain Activity

CASE NAME / ID: **Test, Adult / 121212** Adoption / Open (09/21/2022)

CHILD NAME: **Sacwis, Susie / 123456** DOB: **02/16/2023**

What is Planned

Other Activity Name: *

What is Planned

Add Details: [\(expand full screen\)](#)

What is Completed

Add Details: [\(expand full screen\)](#)

Creating a Child Recruitment Plan

The **Manage Recruitment Plan** screen appears.

1. Select, **Active**, from the **Status** drop-down menu.

Note: In order to mark a plan as Active, all activities added must have narrative in the What is Planned grid. While the CRP has a status of In Progress, Activities can be deleted.

Note: Once the plan is in Active status, additional activities can still be added.

2. Click, **Save**.

Manage Recruitment Plan

CASE NAME / ID: **Test, Adult / 121212** Adoption / Open (09/21/2022)

CHILD NAME: **Sacwis, Susie / 123456** DOB: **02/16/2023**

✔ Your data has been saved. ✕

Child Recruitment Plan Summary

Effective Date: * 01/23/2024 [calendar icon] - End Date: [calendar icon]

[Add Activities to Current Plan](#) ▾

Current Activities

	Activity	Planned	Completed
edit	Register the child's profile on...	02/08/2024 : will remain listed on the agencies website for recruitment purposes....	
edit	Test Activity	04/29/2024 : Test Narrative	04/29/2024: Testing

Status: * Active ▾ **Apply** **Save** Cancel

The **Child Recruitment Planning Filter Criteria** screen appears, displaying the Child Recruitment Plan with a **Status** of **Active**.

Creating a Child Recruitment Plan

Adding Activities Completed

1. Click, **edit**, beside the relevant ID in the **Recruitment Plan ID** column.

Child Recruitment Planning Filter Criteria

Effective Date: *
From Date  - To Date 

Child Name: Sort Results By:

Include Created in Error

Filter

Child Recruitment Activities

Result(s) 1 to 5 of 5 / Page 1 of 1

	Recruitment Plan ID	Child Name / ID	Effective Date	End Date	Status	Linked	
view	11111	Sacwis_Susie / 123456	06/29/2023	09/18/2023	Closed	Matching Conference(s): 37199527	
edit	22222	Sacwis_Susie / 123456	01/23/2024		Active	Matching Conference(s): 37262675	
view	33333	Sacwis_Susie / 123456	03/15/2023	04/05/2023	Closed	Matching Conference(s): 37199527	

The **Maintain Activity** screen appears.

2. Enter narrative in the **What is Completed** text box.

Note: What is Completed: These are details of the actual work that was done by the worker/team; for example, the worker made a phone call to a family member on a specific date to talk about the child, or the worker attended a relevant fair and spoke with people about the child.

Note: Ohio SACWIS will keep a running, time-stamped log of all narrative. The log will include the name of the worker who completed the narrative.

3. Click, **Save**.

Important: You will need to click edit and enter What is Completed narrative for each activity listed in the Current Activities grid.

Note: It may be necessary to make selections from drop-down menus for the What is Completed grid (other than just narrative).

Creating a Child Recruitment Plan

Maintain Activity

CASE NAME / ID: Test, Adult / 121212	<i>Adoption / Open (09/21/2022)</i>
CHILD NAME: Sacwis, Susie / 123456	DOB: 02/16/2023

Activity Description & Details

Activity: Register the child's profile on...

What is Planned

Add Details: [\(expand full screen\)](#)

Test Narrative

✓ ABC

3986

02/08/2024 11:32 AM - **Test, Worker**

will remain listed on the agencies website for recruitment purposes.

What is Completed

Complete at least one of the following:

Save

Cancel

The **Manage Recruitment Plan** screen appears.

Note: The Child Recruitment Plan can have an active status for 30-60 days. It is a running log of all the recruitment efforts the worker is doing to find a permanent home (via the Matching Conference record).

Note: Once the worker has documented everything they wanted to do and did do, then the plan should be marked as complete. Until the worker records the end date on a Completed plan, they can continue to add additional What is Completed narrative only.

1. Enter the **End Date**.
2. Select, **Complete**, from the **Status** drop-down menu.
3. Click, **Save**.

Important: If no families are identified or matched through the recruitment efforts of the worker, as documented in the Matching Conference record, then the worker **MUST** create/begin a NEW Child Recruitment Plan. The copy function can be used to create a new Child Recruitment Plan. This is the copy icon:



Creating a Child Recruitment Plan

Manage Recruitment Plan

CASE NAME / ID: **Test, Adult / 121212**

Adoption / Open (09/21/2022)

CHILD NAME: **Sacwis, Susie / 123456**

DOB: **02/16/2023**

✔ Your data has been saved.

Child Recruitment Plan Summary

Effective Date: *

01/23/2024



End Date:



[Add Activities to Current Plan](#) ▾

Current Activities

	Activity	Planned	Completed
edit	Register the child's profile on...	02/08/2024 : will remain listed on the agencies website for recruitment purposes....	
edit	Test Activity	04/29/2024 : Test Narrative	04/29/2024: Testing

Status: *

Complete ▾

Apply

Save

Cancel

The **Child Recruitment Planning Filter Criteria** screen appears, displaying the **Complete** status.

Child Recruitment Planning Filter Criteria

Effective Date: *



-



From Date

To Date

Child Name:

Sort Results By:

Include Created in Error

Filter

Child Recruitment Activities

Result(s) 1 to 5 of 5 / Page 1 of 1

	Recruitment Plan ID	Child Name / ID	Effective Date	End Date	Status	Linked
view	11111	Sacwis_Susie / 123456	06/29/2023	09/18/2023	Complete	Matching Conference(s): 37199527
edit	22222	Sacwis_Susie / 123456	01/23/2024		Active	Matching Conference(s): 37262675
view	33333	Sacwis_Susie / 123456	03/15/2023	04/05/2023	Closed	Matching Conference(s): 37199527

Creating a Child Recruitment Plan

Note: When the worker marks as complete with an end date, the system will change the status to Closed.

Note: If necessary, you can mark the record as created in error by placing a checkmark in the check box beside, **Created in error**. The worker can only mark the Child Recruitment Plan as created in error when the status is Active, Complete, or Closed and the plan is not linked to a matching conference record or a pre-adoptive staffing record.

Manage Recruitment Plan

CASE NAME / ID: **Test, Adult / 121212**

Adoption / Open (09/21/2022)

CHILD NAME: **Sacwis, Susie / 123456**

DOB: **02/16/2023**

Child Recruitment Plan Summary

Effective Date: *

01/23/2024



End Date:



[Add Activities to Current Plan](#) ▾

Current Activities

	Activity	Planned	Completed
edit	Register the child's profile on...	02/08/2024 : will remain listed on the agencies website for recruitment purposes....	
edit	Test Activity	04/29/2024 : Test Narrative	04/29/2024: Testing

Include Created in Error

Status: *

Complete ▾

Apply

Save

Cancel

The **Child Recruitment Planning Filter Criteria** screen appears.

Creating a Child Recruitment Plan

Generating a Child Recruitment Plan Report

It is now possible to generate a Child Recruitment Plan report.

1. Click the report icon.

The screenshot shows two sections of a web application. The top section, titled "Child Recruitment Planning Filter Criteria", contains a date range selector with "Effective Date:" and "Child Name:" labels, "From Date" and "To Date" input fields, an "Include Created in Error" checkbox, and a "Filter" button. The bottom section, titled "Child Recruitment Activities", shows a table with one row of data. The table has columns for "Recruitment Plan ID", "Child Name / ID", "Effective Date", "End Date", "Status", and "Linked". A red box highlights a document icon in the "Linked" column of the first row.

Recruitment Plan ID	Child Name / ID	Effective Date	End Date	Status	Linked
1111	Sacwis, susie / 123456	07/01/2018	10/01/2018	Active	

The **Document Details** screen appears.

2. Click, **Generate Report**.

The screenshot shows the "Document Details" screen. It includes fields for "Document Category:", "Work-Item ID:", "Task ID:", "Document Title:", "Work-Item Reference:", and "Task Reference:". Below these is a "Document History" table with columns for "ID", "Date Created", "Employee ID", and "Name". At the bottom, there is a "Generate Report" button highlighted with a red box.

ID	Date Created	Employee ID	Name
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The **Child Recruitment Plan** report appears. You have the option to print or download this report.

3. Click, **Save**.

Creating a Child Recruitment Plan

Child Recruitment Plan

TEST COUNTY CHILDREN SERVICES

CHILD RECRUITMENT PLAN ID

Child's Name / ID:	Case ID:
Effective Date: 06/29/2023	End Date: 09/18/2023
Status: Closed	

Linked: Matching Conference(s) ID:

Activity: Register the child's profile on...

What is Planned:
06/29/2023 09:23 AM - Ongoing

What is Completed:
Date submitted to own agency website:
Own Agency website child profile URL:
Date submitted to Ohio Adoption Photolisting:
OAPL Number:
Ohio Adoption Photolisting child profile URL:
Date submitted to AdoptUSKids:
AdoptUSKids Number:
AdoptUSKids Sibling Number:
AdoptUSKids child profile URL:
09/18/2023 12:53 PM - Complete but ongoing.

Save **Cancel**

A copy of the report will appear in the **Document History** grid on the **Document Details** page.

Document Details

Document Category: Document Title: Child Recruitment Report

Work-Item ID: 1111 Work-Item Reference: Sacwis, Susie

Task ID: 12122 Task Reference:

Document History

ID	Date Created	Employee ID	Name
1234123	04/29/2024 11:49 AM		

Generate Report

Cancel

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at SACWIS_HELP_DESK@ifs.ohio.gov.