Managing Case Services

Ohio SACWIS

Knowledge Base Article

Managing Case Services

Table of Contents

Managing Case Services

Overview

This Knowledge Base Article will explain how to access the Ohio SACWIS system for managing the various aspects of case services.

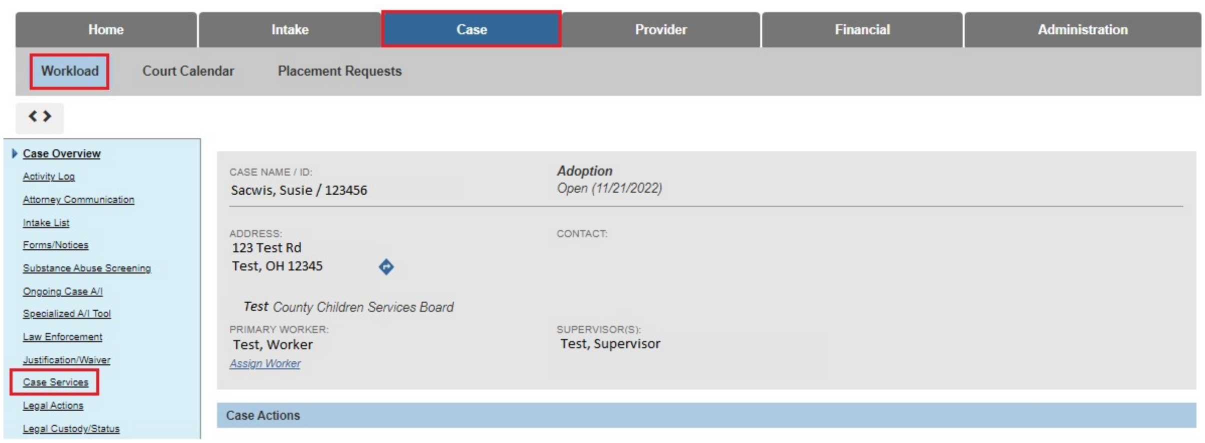
Viewing Case Service Information

To view case service information, complete the following steps:

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

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. On the **Case Overview** screen, click the **Case Services** link in the light-blue **Navigation** menu on the left.

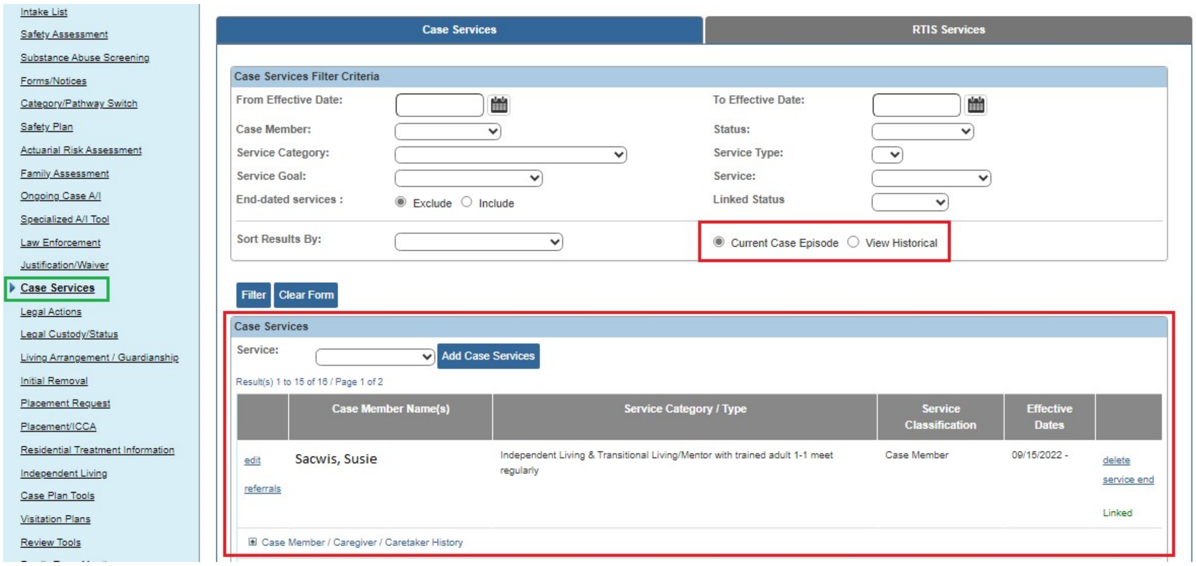


The **Case Services Filter Criteria** screen appears displaying the **Case Services** section beneath it.

Managing Case Services

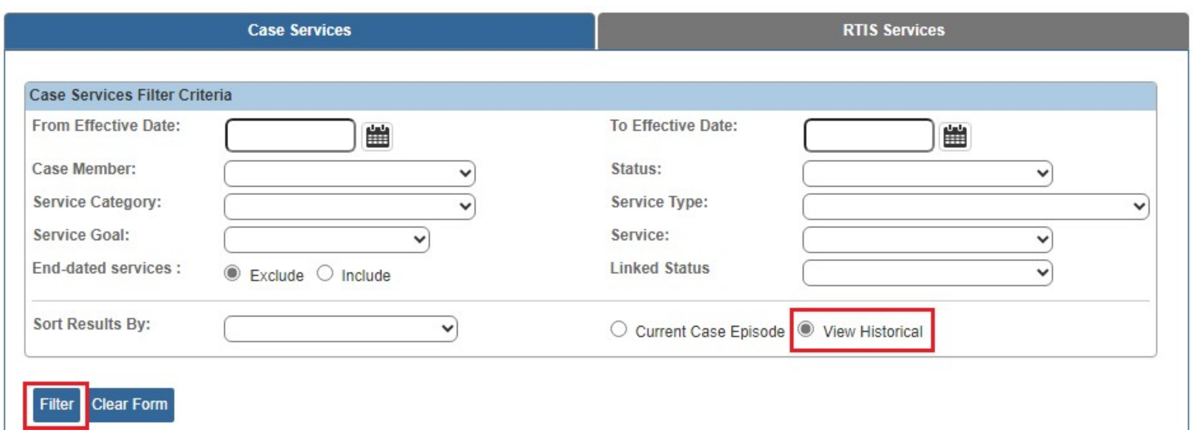
Viewing Current or Historical Case Services

As shown below, the screen defaults with the **Current Case Episode** radio button selected and the **Case Services** section displaying all **current** case services.



To view **all case services** created during any open case episode (current and past), complete the following steps:

1. Click the **View Historical** radio button
2. Click the **Filter** button.



The **Case Services** section displays **all services** from the current and previous open case episodes.

Viewing the Case Member / Caregiver / Caretaker History

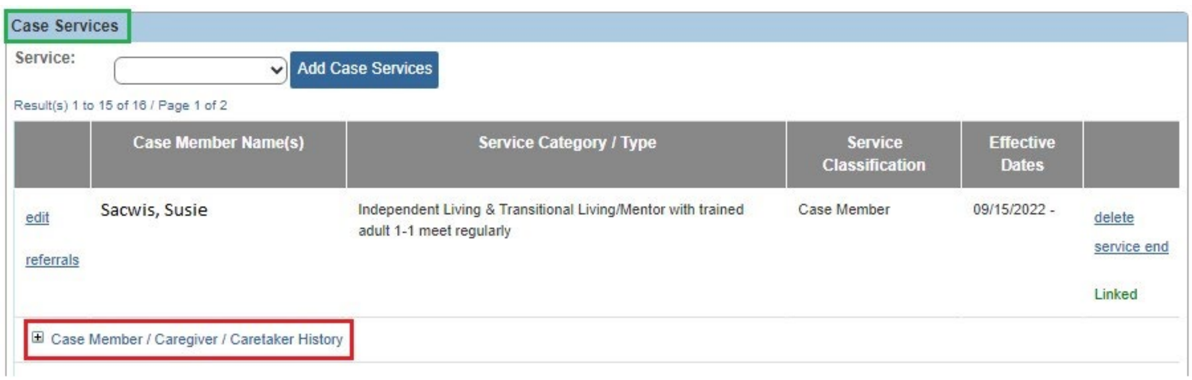
The **Case Services** section can display a history of the service(s) linked to a case member, along with the current status of those services.

When expanded, the **Case Member / Caregiver / Caretaker History** link displays the following information (also shown below):

- All Case Members
- Caregiver / Caretaker (if applicable)
- Current Case Service Status
- Provider's Name
- Service Description
- Status Begin Date / End Date

To view the history, complete the following steps:

1. In the **Case Services** section, locate the appropriate case service.
2. Click the **Case Member / Caregiver / Caretaker History** link.



Case Services

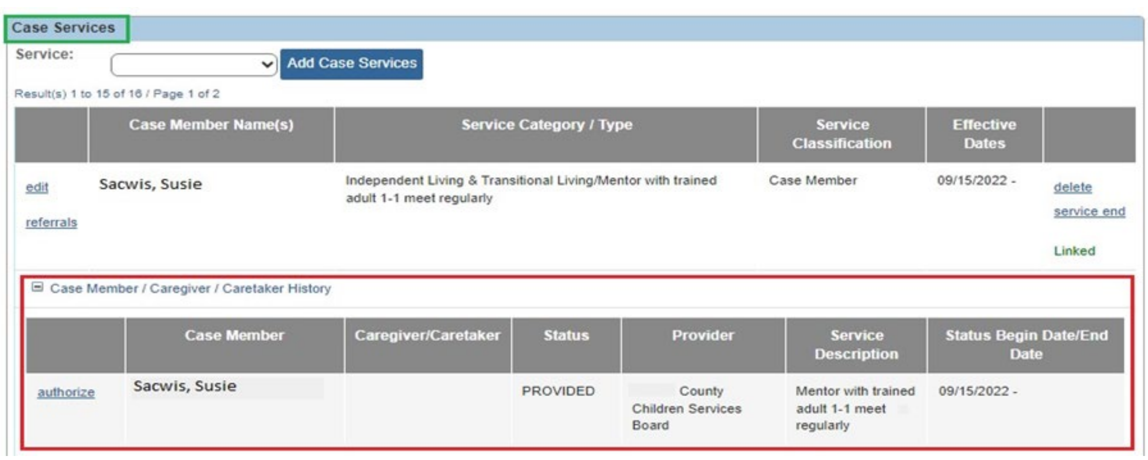
Service: Add Case Services

Result(s) 1 to 15 of 16 / Page 1 of 2

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
edit referrals	Sacwis, Susie	Independent Living & Transitional Living/Mentor with trained adult 1-1 meet regularly	Case Member	09/15/2022 -	delete service end Linked

⊞ Case Member / Caregiver / Caretaker History

Expanded Example Showing One Case Member



Case Services

Service: Add Case Services

Result(s) 1 to 15 of 16 / Page 1 of 2

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
edit referrals	Sacwis, Susie	Independent Living & Transitional Living/Mentor with trained adult 1-1 meet regularly	Case Member	09/15/2022 -	delete service end Linked

⊟ Case Member / Caregiver / Caretaker History

	Case Member	Caregiver/Caretaker	Status	Provider	Service Description	Status Begin Date/End Date
authorize	Sacwis, Susie		PROVIDED	County Children Services Board	Mentor with trained adult 1-1 meet regularly	09/15/2022 -

3. To close the history, click the **Case Member / Caregiver / Caretaker History** link again.

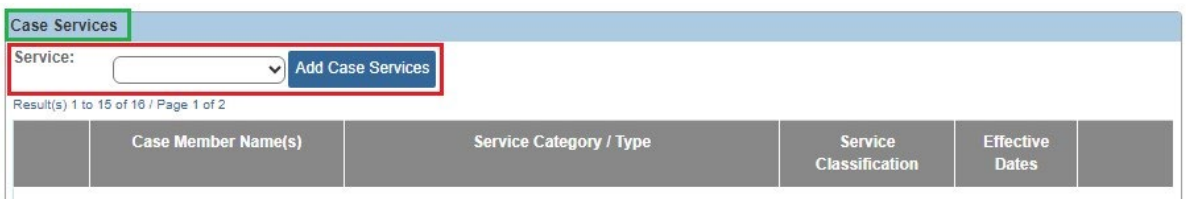
Adding a New Case Service

Complete the following steps to add a new case service for a case member:

1. Navigate to the **Case Services** section.
2. In the **Service** field, select **Case Member** from the drop-down list.

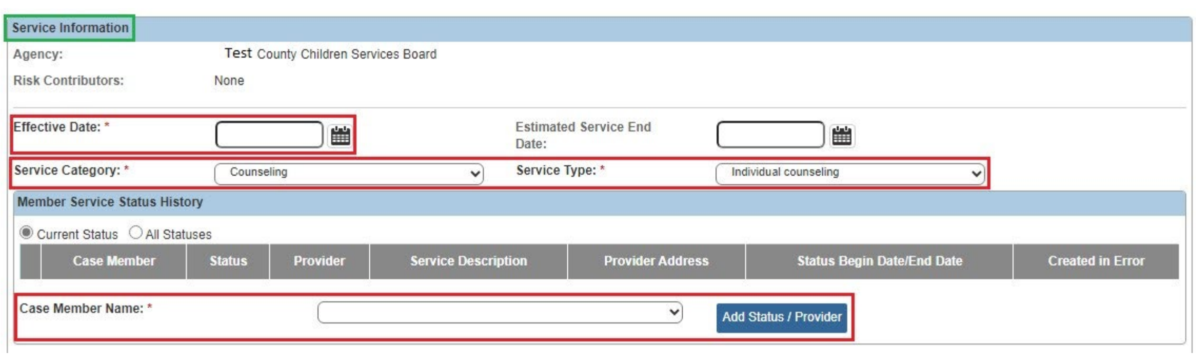
Important: You should only select **Caregiver / Caretaker** when one of the children is in placement. **To add a caregiver / caretaker service**, see the **Adding a New Caregiver / Caretaker Service** sub-section later in this Knowledge Base Article.

3. Click the **Add Case Services** button.



The **Service Information** screen appears.

4. In the **Effective Date** field, enter the appropriate date.
5. In the **Service Category** field, select the appropriate category.
6. In the **Service Type** field, select the appropriate type from the drop-down list.
7. In the **Case Member Name** field, select the appropriate name.
8. Click the **Add Status / Provider** button.

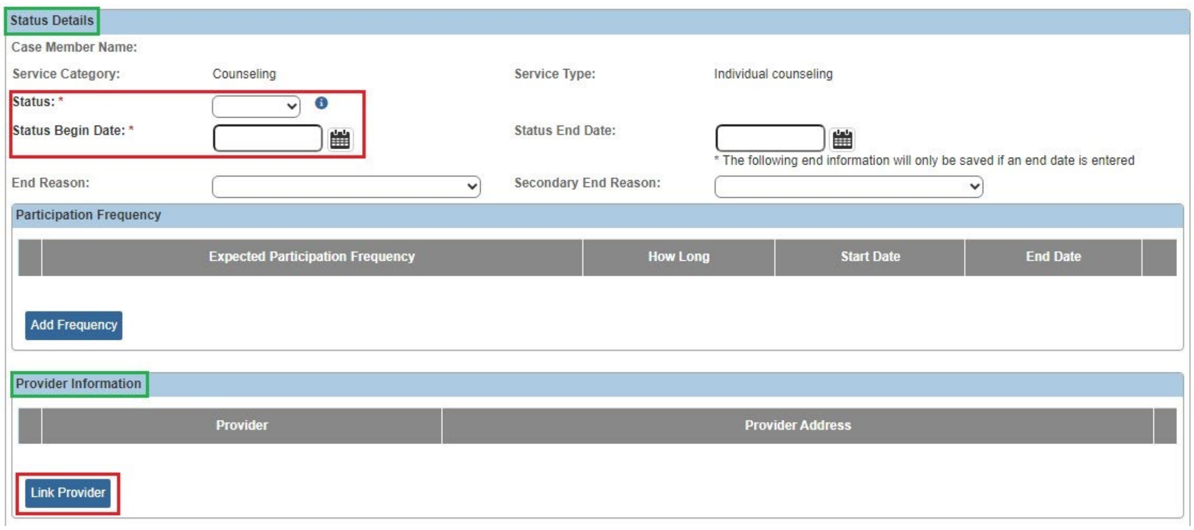


The **Status Details** screen appears.

9. In the **Status** field, select the appropriate status from the drop-down list.
10. Select a date in the **Status Begin Date** field.

Important:

- The **Link Provider** button will only be available (enabled) if the status types of **Referred**, **Scheduled**, **Provided** are selected.
- If you hover over the icon the system displays definitions of the four status terms as shown below.



Status Term Definitions for Icon

Needed: Based on a completed assessment of the family, service(s) have been identified.

Referred: Worker/family contacted service provider(s) to determine if provider can meet service needs of the child and/or family.

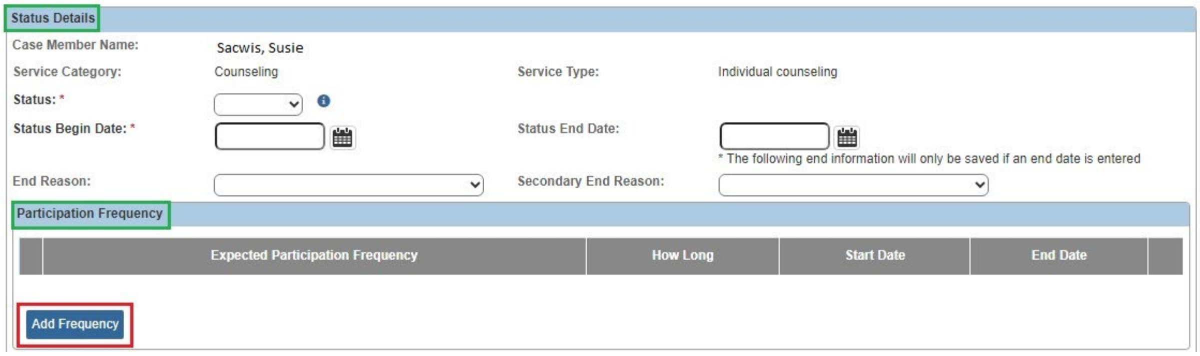
Scheduled: Worker/family contacted service provider(s) appointment scheduled.

Provided: Services received by the child/family from a provider or the agency directly.

Adding Participation Frequency

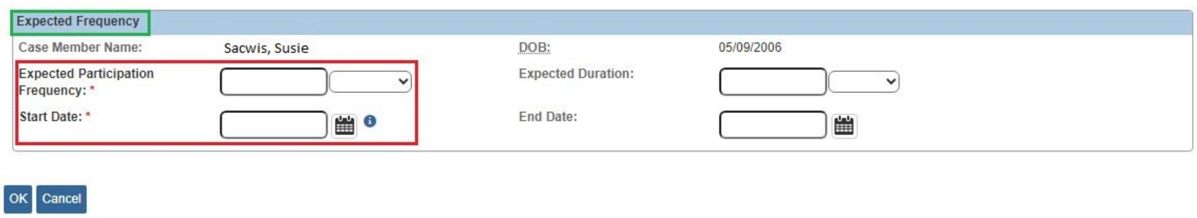
To add a case member's participation frequency, complete the following steps:

1. If applicable, click the **Add Frequency** button on the **Status Details** screen.



The **Expected Frequency** screen appears.

2. In the **Expected Participation Frequency** field, enter the frequency into the **two** fields. In the second field, you will make a selection from the drop-down list.
3. In the **Start Date** field, enter the appropriate date.



Important:

- The frequency participation date cannot be before the start date of the status record for a case member.
- If you hover over the icon the **Start Date** definition appears with a message saying: The **Expected Frequency Start Date** should be the date of the first schedule appointment.
- If **One Time** is selected from the **Expected Participation Frequency** field drop-down list, the text box is not available (disabled). If any other value is selected, the text box must be populated. The text box accepts both alpha and numeric content.

4. If needed, complete the **Expected Duration** field.

Important:

- You can return to this screen and enter the **Expected Duration** date at a later time.
- The **Expected Duration** field's values are **Days**, **Weeks**, **Months**, and **Years**.
- The **Expected Duration** field can be future dated, but it must be on or after the **Expected Participation Frequency Start** date.

5. When complete, click the **OK** button.

The **Status Details** screen appears displaying the new content in the **Participation Frequency** section.

6. To edit this record, click the **Edit** link on the left.
7. To delete this record, click the **Delete** link on the right.
8. After editing or deleting, click the **OK** button again.
9. To add another record, click the **Add Frequency** button again.

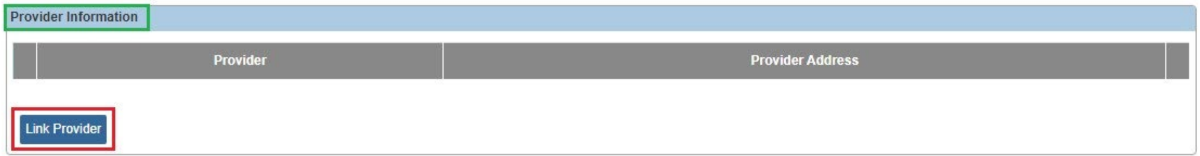
Linking a Provider

Linking a provider is **required** for the statuses of **Referred**, **Scheduled**, and **Provided** to save the record. To do so, complete the following steps:

1. On the **Status Details** screen in the **Provider Information** section, click the **Link Provider** button.

Important:

- The **Link Provider** button will only be available (enabled) when the status types of **Referred, Scheduled**, and **Provided** are selected in the **Status** field.
- For a **Referred** status, multiple providers can be linked. To do so, refer to the **Linking Multiple Providers to a Referred Status** sub-section.

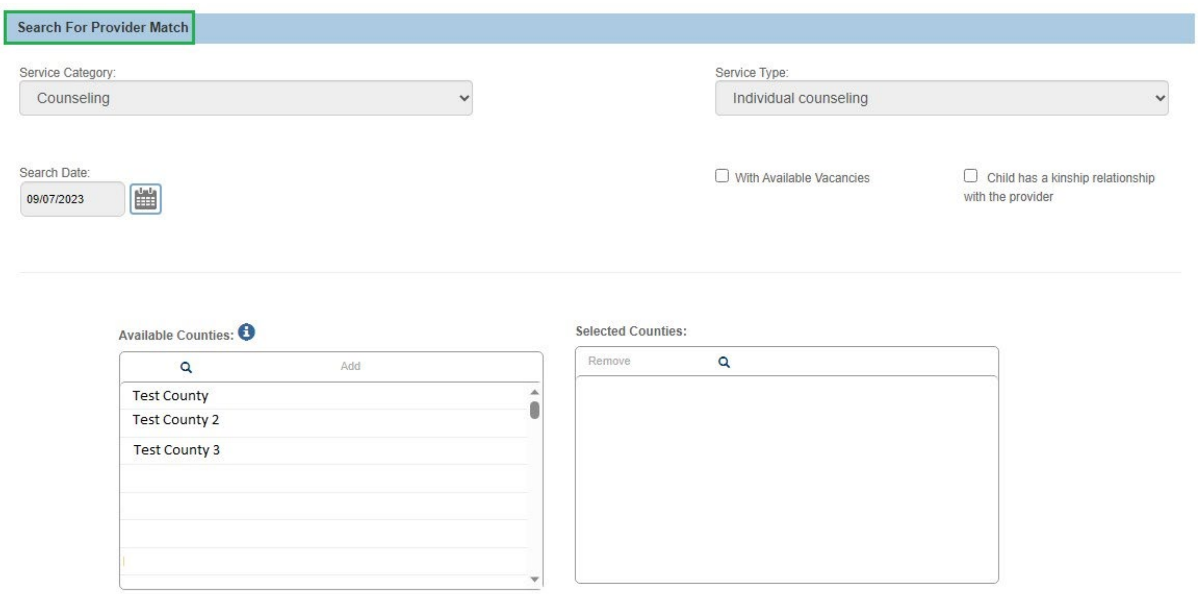


The **Provider Match Search Criteria** screen appears displaying the **Provider Information** section. Many fields are already pre-populated with data.

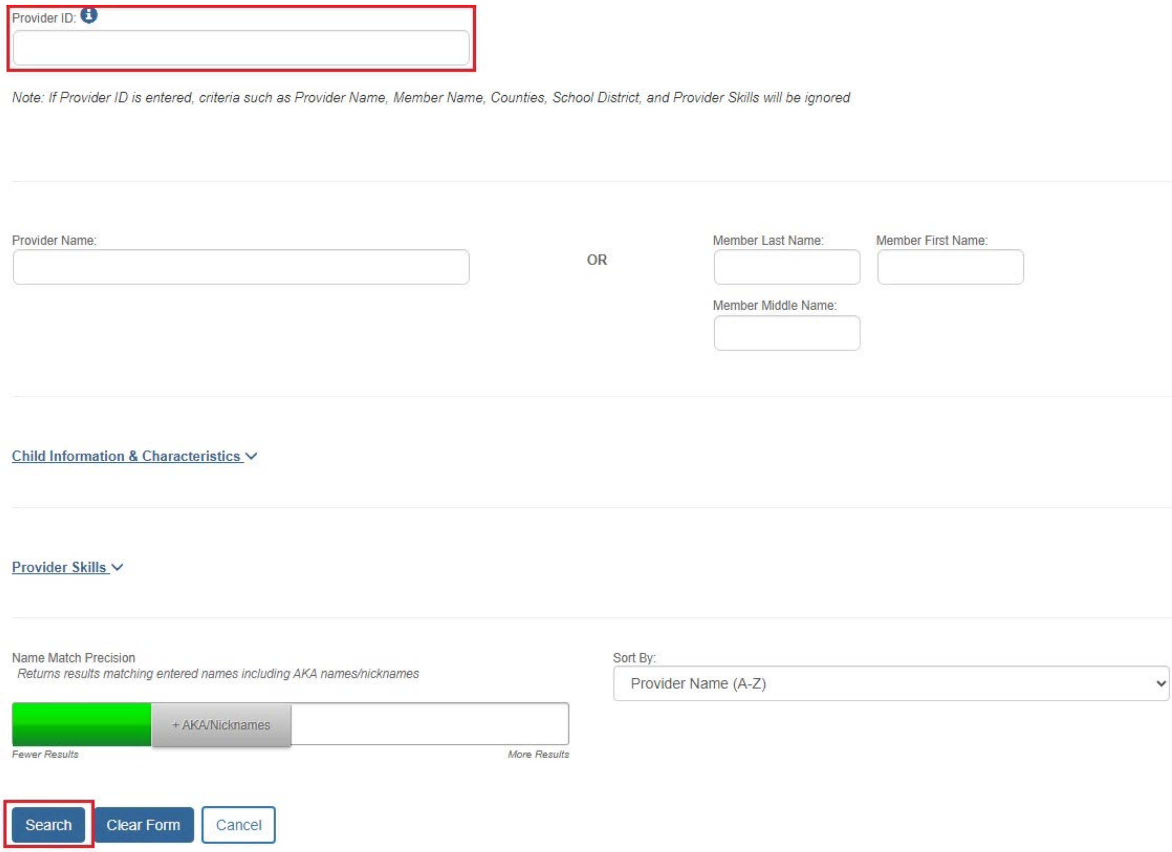
Important:

- If you know the **Provider ID** number, you can search by the Provider ID.
- As agencies complete Non-ODJFS merges within Ohio SACWIS, the recommending agency for most provider types will switch to ODJFS. As a result, most Non-ODJFS providers will eventually appear showing ODJFS as the recommending agency.

2. Click the **Search** button.



Managing Case Services

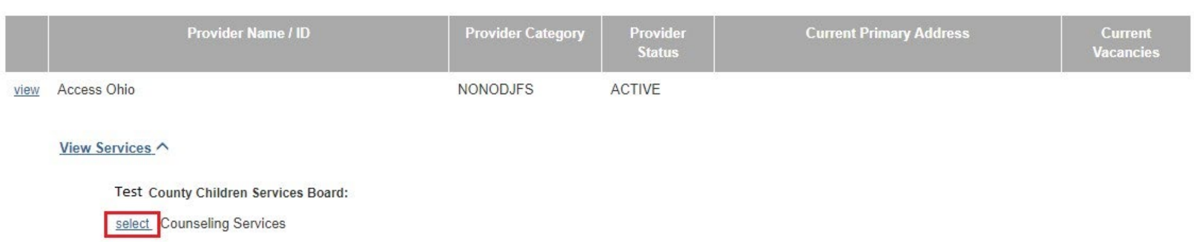


The **Provider Match Search Results** appears at the bottom of the screen.

3. To select a provider, click the **Select** link in the appropriate row.

Important:

- If your agency has not yet entered a service for this provider, please contact your Services Administrator and have them set up the service.
- To save the record, the provider must have an **active service** as of the begin date and **active status** as of current system date.



The **Status Details** screen appears displaying the **Provider Information** section now populated with information as shown below.

4. Click the **Save** button at the bottom of the screen.

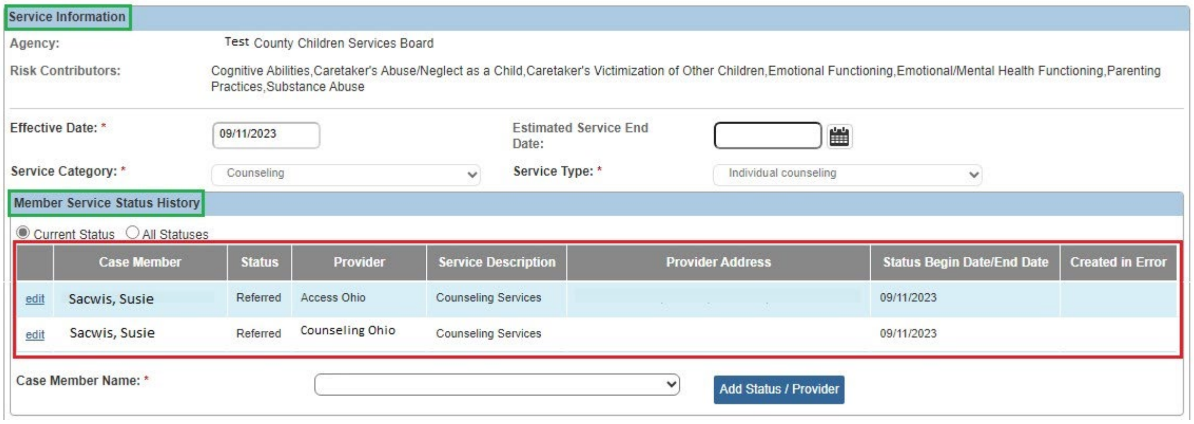
Linking Multiple Providers to a Referred Status

As mentioned above, multiple providers can be linked to a **Referred** status. To do so, after linking to the first provider, complete the following steps:

1. Navigate to the **Service Information** screen using the steps above.
2. In the **Case Member Name** field, select the appropriate name.
3. Click the **Add Provider Status** button again.
4. On the **Status Details** screen, select **Referred** in the **Status** field.
5. Enter the **Status Begin Date**.

Note: The system automatically defaults the previously selected provider in the **Provider Information** section.

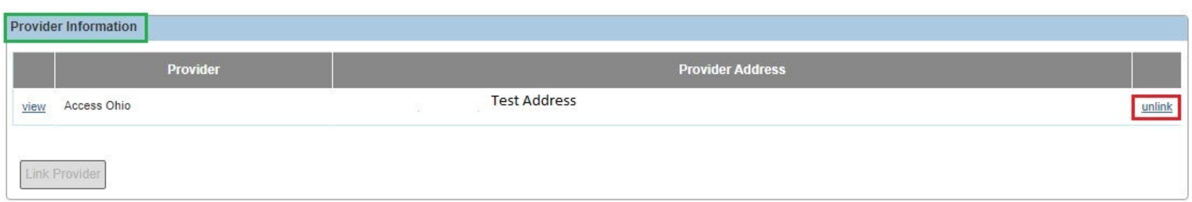
6. Unlink that provider (using the steps in the sub-section below).
7. Link another provider (using the steps in this sub-section).
8. Click the **Save** button. The **Service Information** screen appears displaying the multiple providers as shown below.
9. Repeat these steps as many times as needed to show all providers for the **Referred** status.



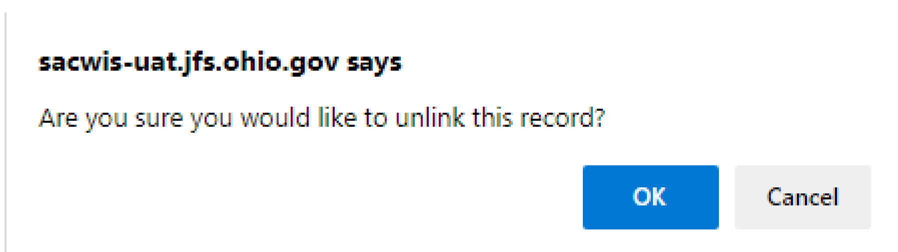
Unlinking a Provider

To unlink a provider, complete the following steps:

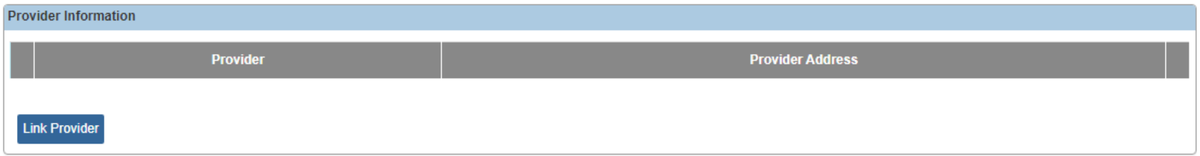
1. On the **Status Details** screen in the **Provider Information** section, locate the appropriate row.
2. Click the **Unlink** link on the right.



3. Click the **OK** button when the following warning message appears:



The **Provider Information** section appears displaying **no provider information**.

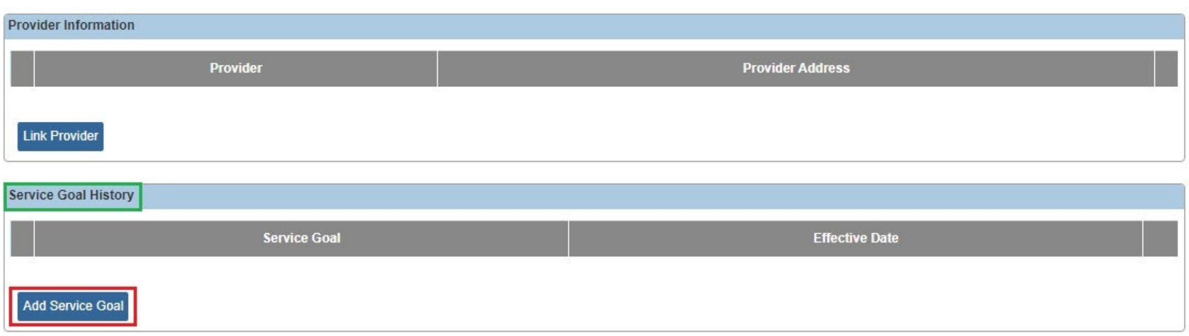


You can link a new provider following the steps in the **Linking a Provider** sub-section.

Adding Service Goals

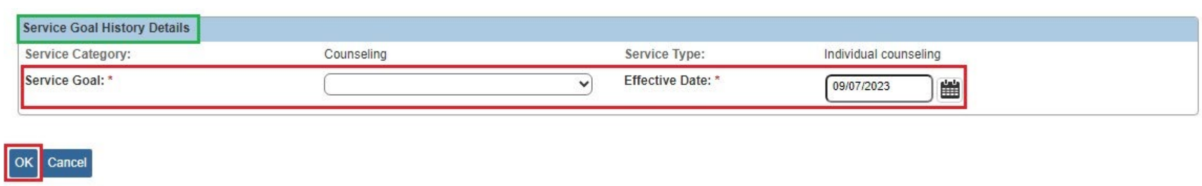
To add a service goal, complete the following steps:

1. On the **Status Details** screen, click the **Add Service Goal** button.



The **Service Goal History Details** screen appears.

2. In the **Service Goal** field, select the appropriate goal from the drop-down list.
3. In the **Effective Date** field, enter the effective date. The case service effective date auto-populates, but it can be changed.
4. Click the **OK** button.



The **Status Details** screen appears displaying the now populated **Service Goal History** section as shown below.

5. To edit this record, click the **Edit** link on the left.
6. To delete this record, click the **Delete** link on the right.
7. When finished editing or deleting, click the **OK** button.
8. To add another service goal record, click the **Add Service Goal** button again.

Service Goal History

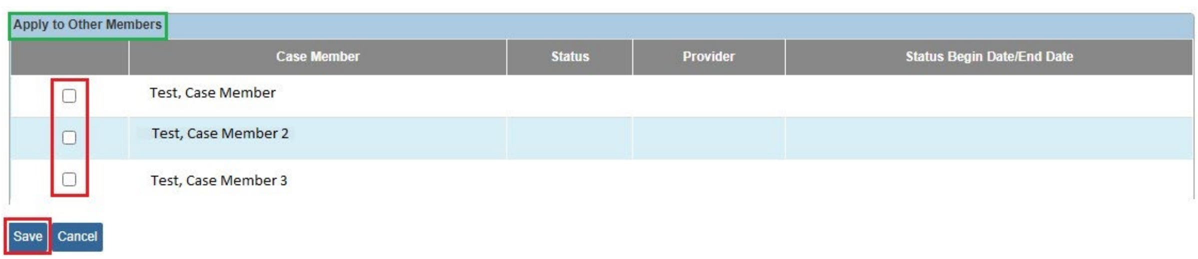
	Service Goal	Effective Date	
edit	Prevention	09/07/2023	delete

Add Service Goal

Applying Information to Other Case Members

To apply this same information to other case members, complete the following steps:

1. On the **Status Details** screen, scroll down to the **Apply to Other Members** section.
2. Enter a check mark in the box of the applicable case member(s).
3. Click the **Save** button at the bottom of the screen.

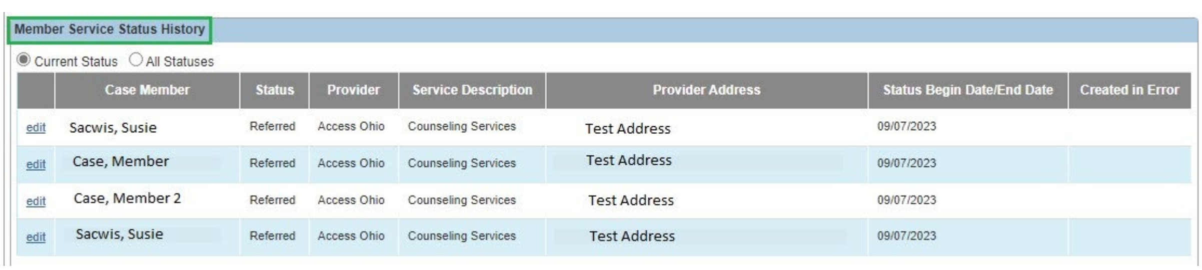


Apply to Other Members

	Case Member	Status	Provider	Status Begin Date/End Date
☐	Test, Case Member			
☐	Test, Case Member 2			
☐	Test, Case Member 3			

Save Cancel

The **Service Information** screen appears displaying all the selected case members as shown below.



Member Service Status History

Current Status All Statuses

	Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit	Sacwis, Susie	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	
edit	Case, Member	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	
edit	Case, Member 2	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	
edit	Sacwis, Susie	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	

Editing Individual Status Records

You can edit many aspects of a status record, such as:

- Adding, editing, or deleting a case member's participation frequency
- Unlinking a provider and linking a new provider in the current record
- Linking multiple providers to a record which has a status of Referred
- Adding, editing, or deleting new service goals
- End-dating a case status

To edit a status record, complete the following steps:

1. Navigate to the case member's **Service Information** screen.
2. Click the **Edit** link next to the appropriate case member record.

Member Service Status History

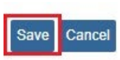
Current Status All Statuses

	Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit	Sacwis, Susie	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	
edit	Case, Member	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	
edit	Case, Member 2	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	
edit	Sacwis, Susie	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	

The **Status Details** screen for that record appears.

3. To edit any of the items listed above, refer to the applicable sub-section in this Knowledge Base Article. See the Table of Contents to locate a specific topic.

4. When complete, click the **Save** button at the bottom of the screen.



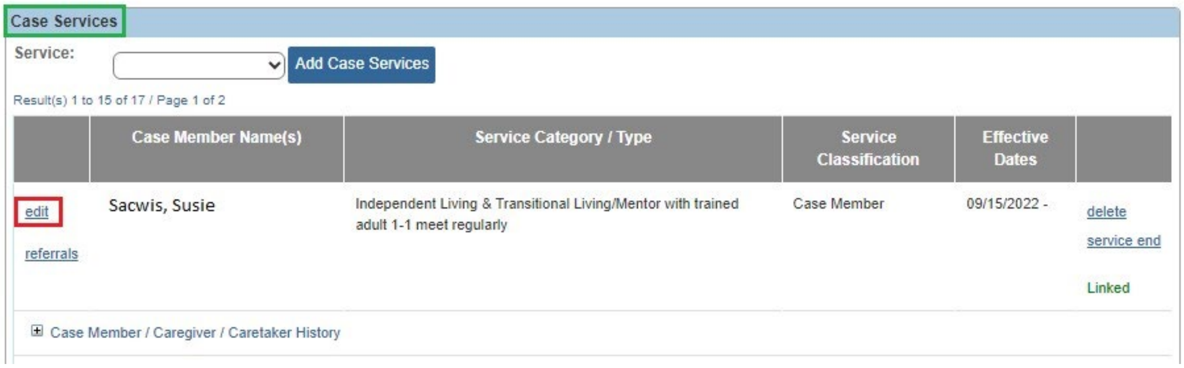
The **Service Information** screen appears.

Managing Case Services

Adding a New Case Member Service Status Record

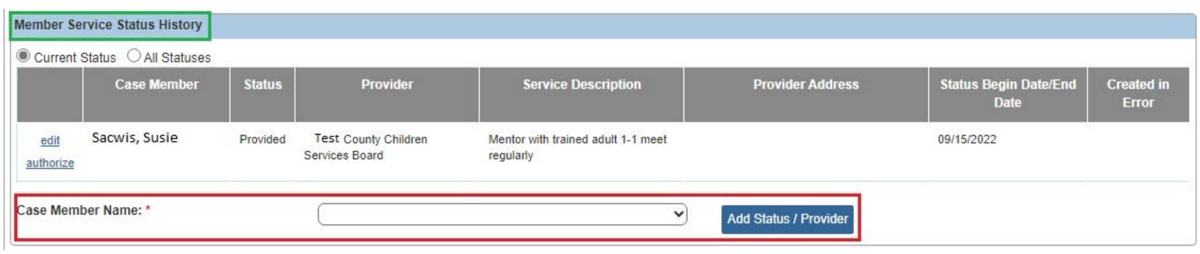
To add a new case member service status record, complete the following steps:

1. Navigate to the **Case Services** section for that case member.
2. In the appropriate row, click the **Edit** link (on the left of the grid).



The **Service Information** screen appears.

3. In the **Case Member Name** field (near the bottom), select the appropriate name.
4. Click the **Add Status / Provider** button.

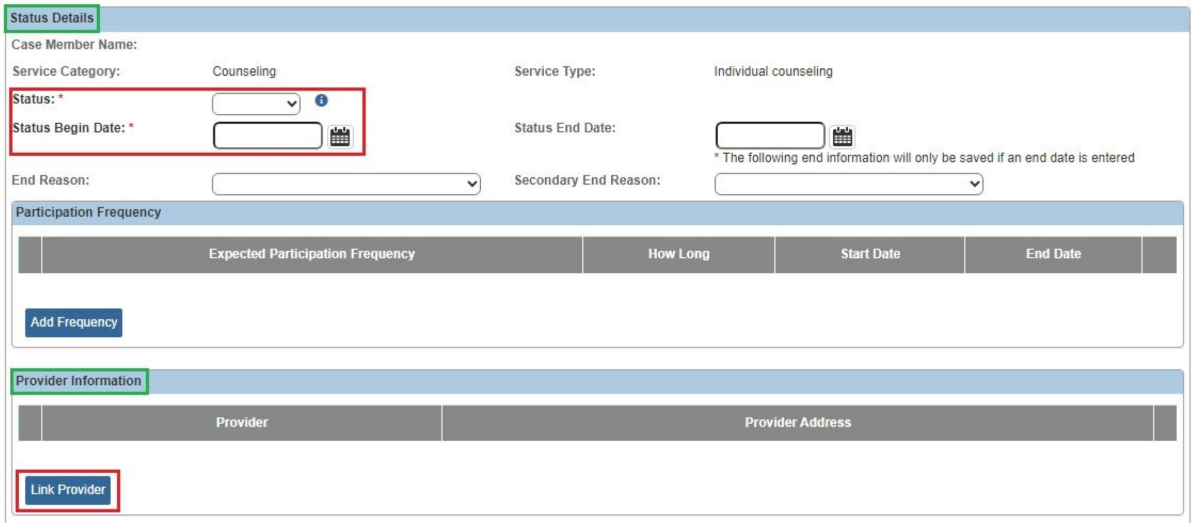


The **Status Details** screen appears.

5. In the **Status** field, select the new case status from the drop-down list.

Note: You can have multiple **Referred** statuses at the same time.

6. In the **Status Begin Date** field, enter the appropriate date.
7. To link a provider, follow the steps in the **Linking a Provider** sub-section of this Knowledge Base Article.

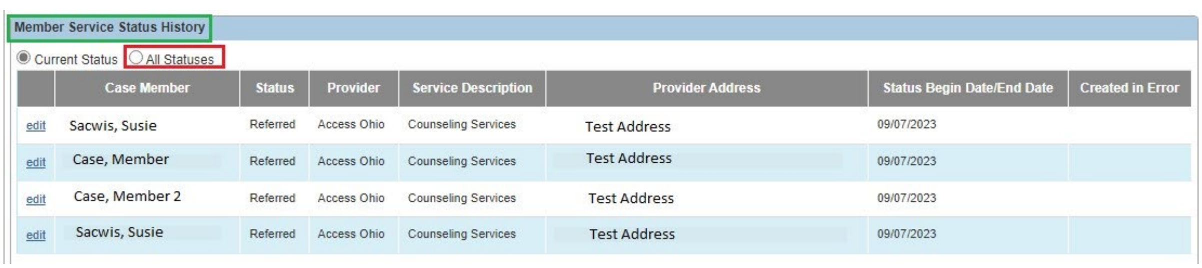


8. On the **Status Details** screen, update the following sections (as needed) using the steps previously discussed in this Knowledge Base Article:
   - Participation Frequency (**Adding Participation Frequency** sub-section)
   - Service Goal History (**Adding Service Goals** sub-section)
   - Apply to Other Members (**Applying Information to Other Case Members** sub-section)

9. When complete, click the **Save** button at the bottom of the screen. The **Service Information** screen appears.

Important: Upon save, the system populates the status end date of the previous non-end dated status record using the status begin date.

10. On the **Member Service Status History** screen, if you click the **All Statuses** radio button, you will see all status records for the case service.



Member Service Status History

Current Status | All Statuses

	Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit	Sacwis, Susie	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	
edit	Case, Member	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	
edit	Case, Member 2	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	
edit	Sacwis, Susie	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	

Adding a New Caregiver / Caretaker Service

Managing Case Services

You should only select **Caregiver / Caretaker** when one of the children is in placement. To add a new service, complete the following steps:

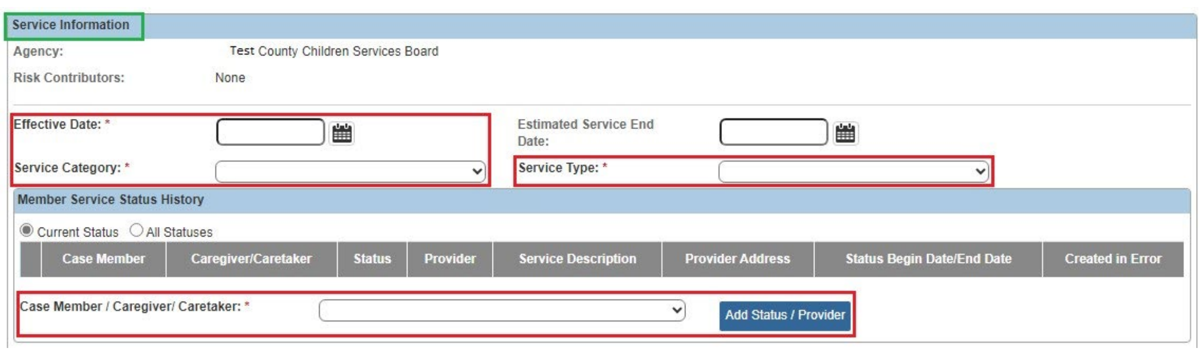
1. Navigate to the **Case Services** section for that case member.
2. In the **Service** field, select **Caregiver / Caretaker** from the drop-down list.
3. Click the **Add Case Services** button.

The **Service Information** screen appears.

4. In the **Effective Date** field, enter the appropriate date.
5. In the **Service Category** field, select the appropriate category.
6. In the **Service Type** field, select the appropriate type from the drop-down list.
7. In the **Case Member Name** field, select the appropriate name.

Important: The case member displays along with his / her current provider and **will only display** if the child is / was in placement on the effective date of the service.

8. Click the **Add Status / Provider** button.



The **Status Details** screen appears.

9. To finish adding a caregiver service, complete the steps as discussed in the **Adding a New Case Service** sub-section. Begin with the step where the

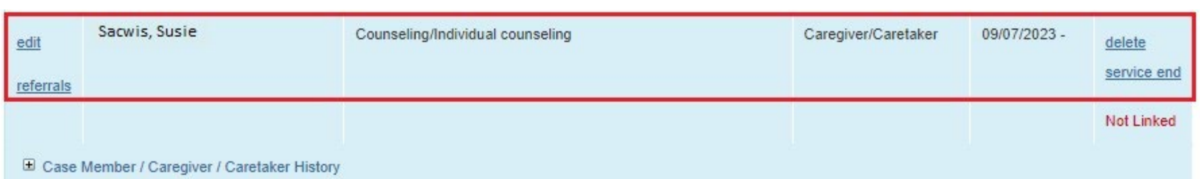
Status Details screen appears. (The steps for adding a case member or a caregiver / caretaker are the same from that point on.)

10. Next, complete the steps in the following sub-sections as previously discussed in this Knowledge Base Article:
    - **Linking a Provider** (required for **Referred**, **Scheduled**, and **Provided** statuses)
    - **Adding Participation Frequency** (if needed)
    - **Adding Service Goals** (if needed)
    - **Applying Information to Other Members** (children in placement) (if needed)

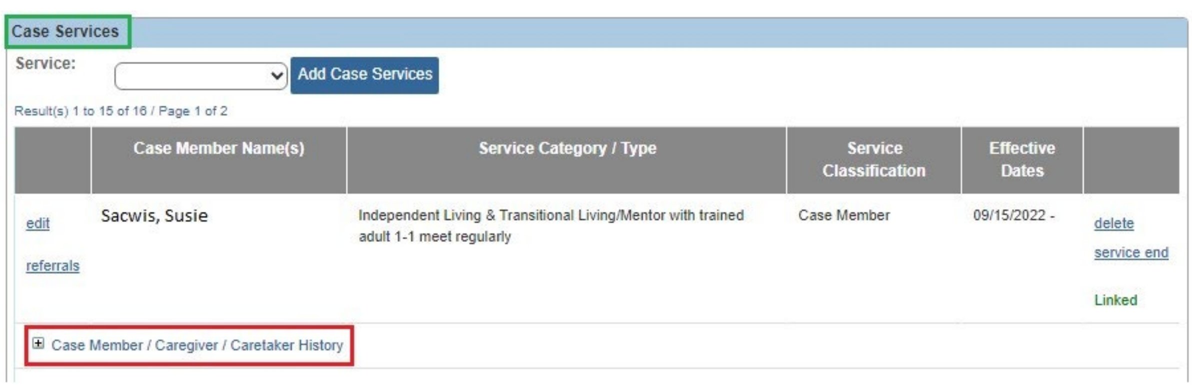
11. When complete, click the **Save** button at the bottom of the **Status Details** screen. The **Service Information** screen appears.

12. Click the **Save** button again.

The **Case Services** screen appears displaying the new caregiver / caretaker record.



13. If needed, click the **Case Member / Caregiver Caretaker History** link for that row to expand the box and view historical details.

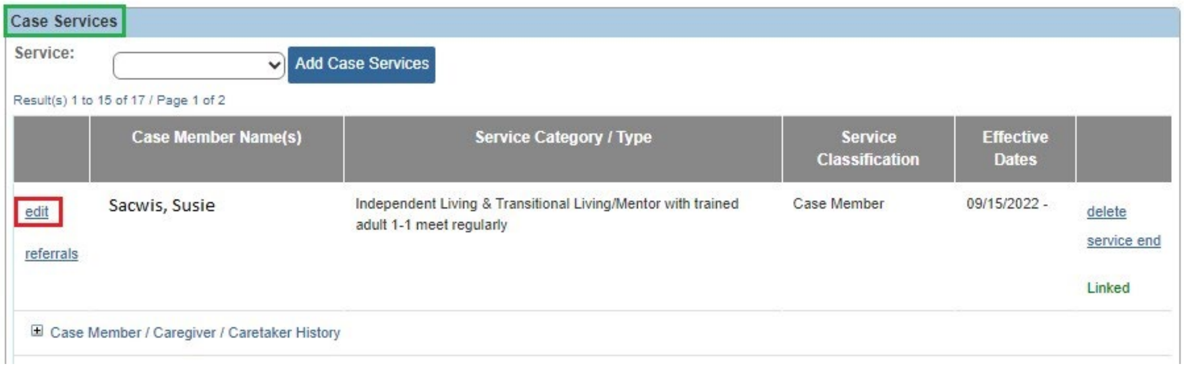


Managing Case Services

Marking a Status Record as Created in Error

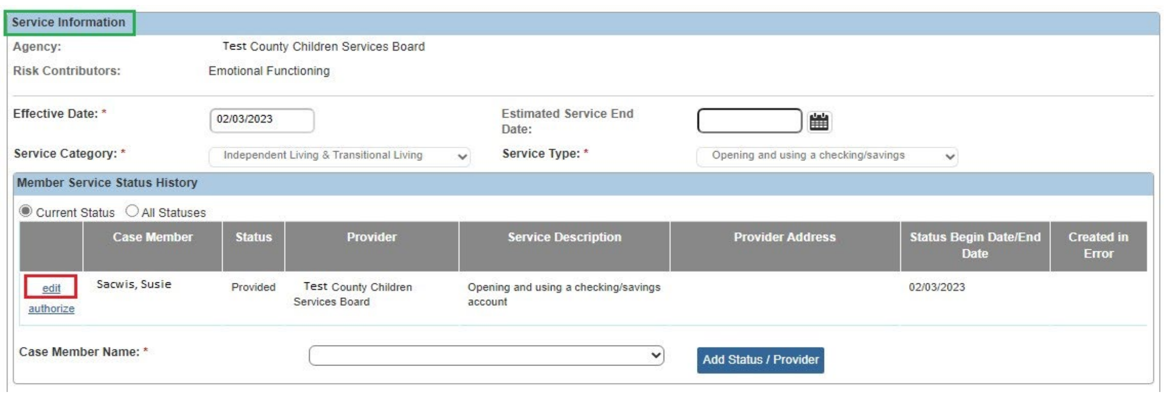
To mark a status record as created in error, complete the following steps:

1. On the **Case Services** screen for that case member, click the **Edit** link in the appropriate row.



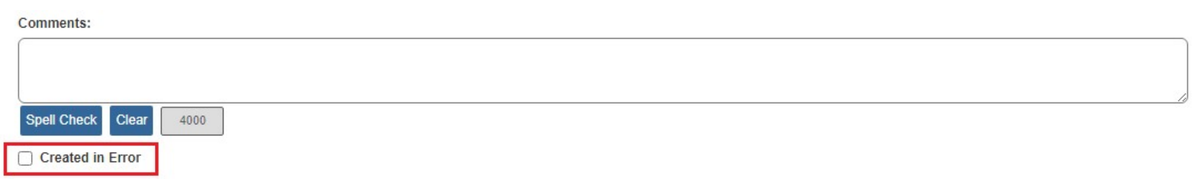
The **Service Information** screen appears.

2. In the **Member Service Status History** section, click the appropriate **Edit** link.



The **Status Details** screen appears.

3. Scroll down and click the **Created in Error** check box (located below the **Comments** field).

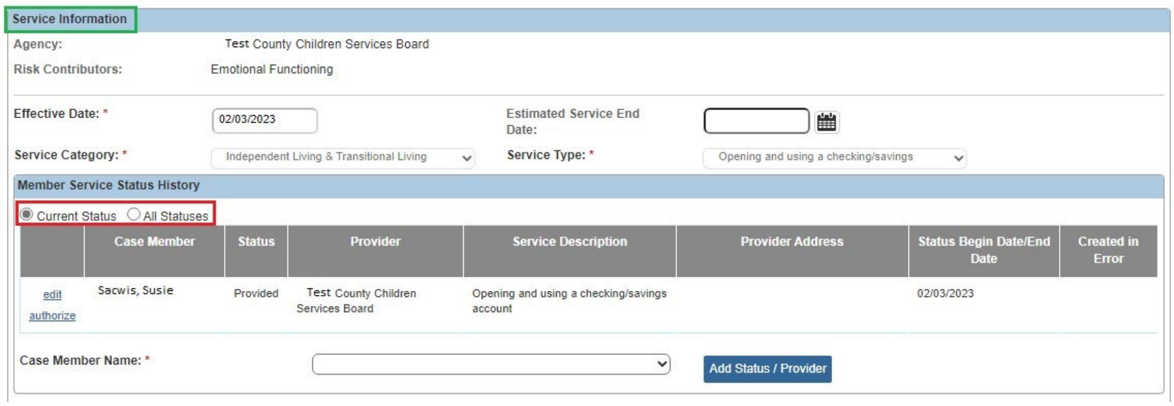


4. Click the **Save** button at the bottom of the screen.

The **Service Information** screen appears with that record removed from the **Member Service Status History** section.

The **Current Status radio** button defaults to show only the current status for all case members created in that service.

5. To see **all Created in Error entries**, click the **All Statuses** radio button.

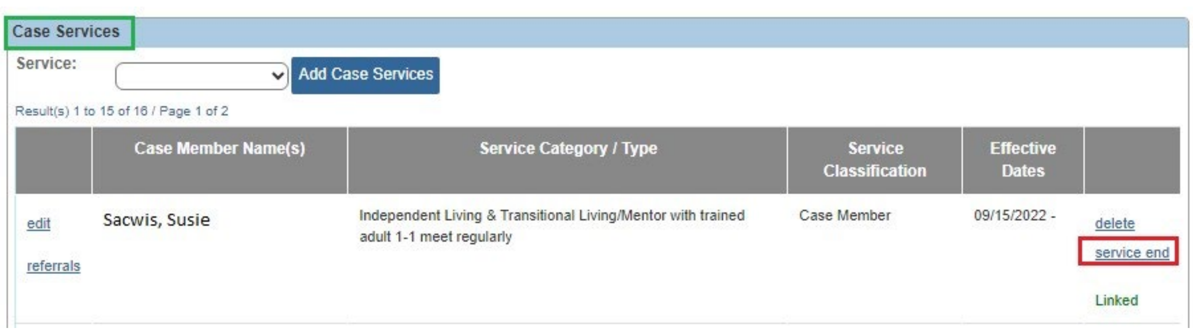


All the case members appear in the **Member Service Status History** section. The **Created in Error** entries for that service have a **Yes** in the **Created in Error** column.

End-Dating a Case Service

To end date a case service, complete the following steps:

1. On the **Case Services** screen for the case member, locate the appropriate row.
2. Click the **Service End** link (on the right).

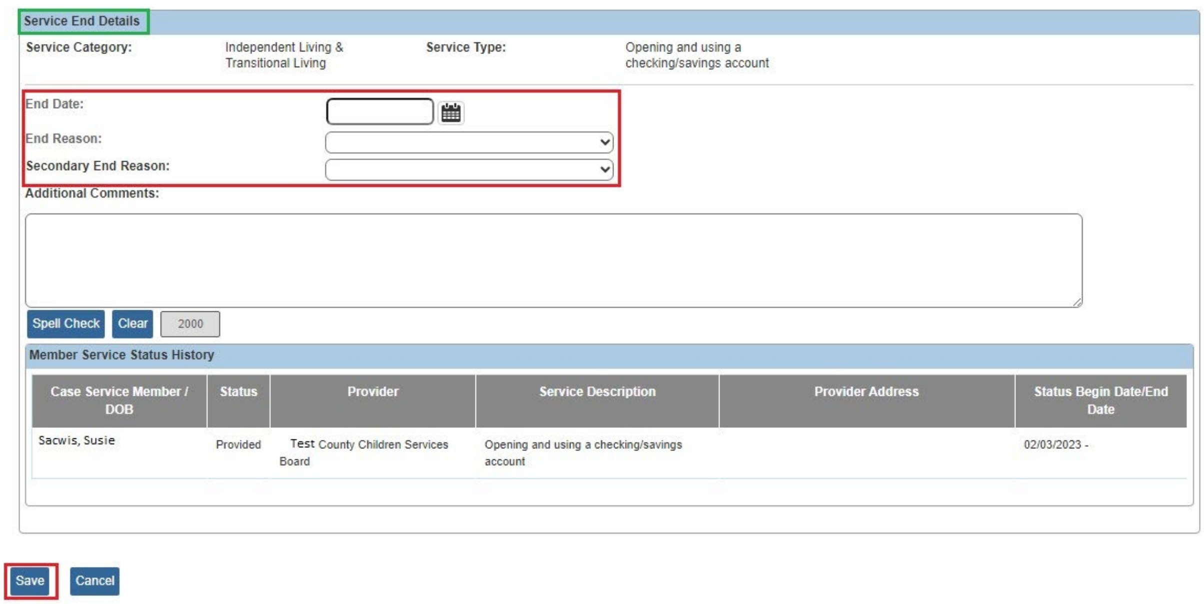


The **Service End Details** screen appears.

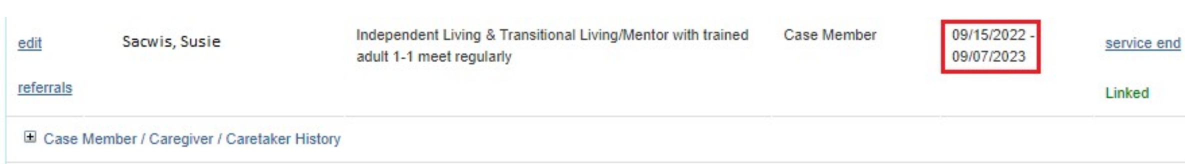
3. Enter a date in the **End Date** field.

Important: If **multiple case members** are on a service, the system will end date the case service, as well as the current status record for all case members (if it has no existing end date).

4. Select a reason from the **End Reason** field drop-down list.
5. Click the **Save** button at the bottom of the screen.



As shown below, the **Case Services** screen appears displaying the record with an end date in the **Effective Dates** column. Additionally, the system displays a **View** link on the left, rather than the **Edit** link that previously appeared.



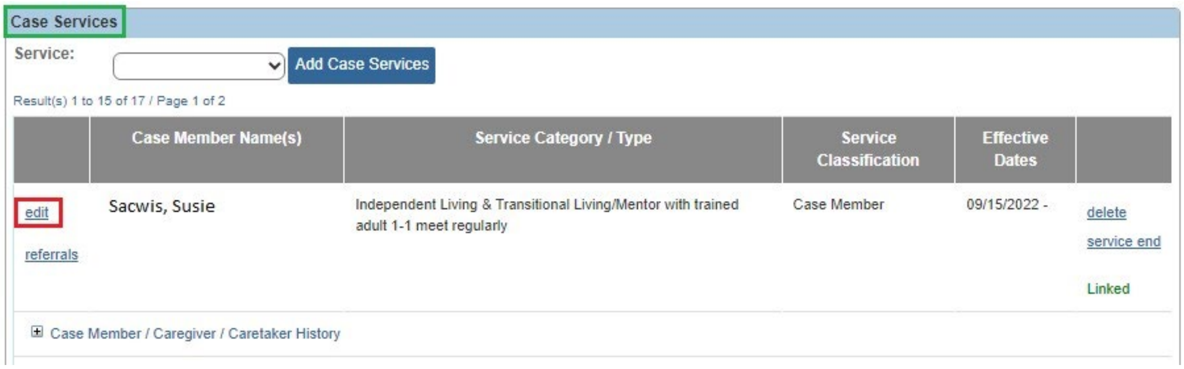
End-Dating a Case Service Member Status Record

Managing Case Services

To end date a case service member status record, complete the following steps:

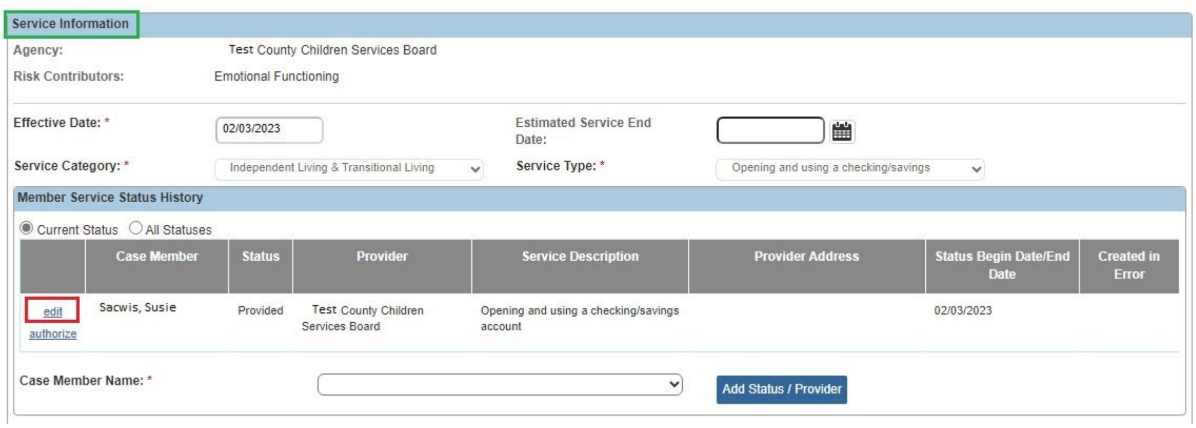
Note: When you end date a case service, Ohio SACWIS automatically end dates the case service member status record (if it has no existing end date) for all case members. The steps in this sub-section assume that the case service is continuing and only the case service member status is ending.

1. On the **Case Services** screen for the case member, locate the appropriate row.
2. Click the **Edit** link.



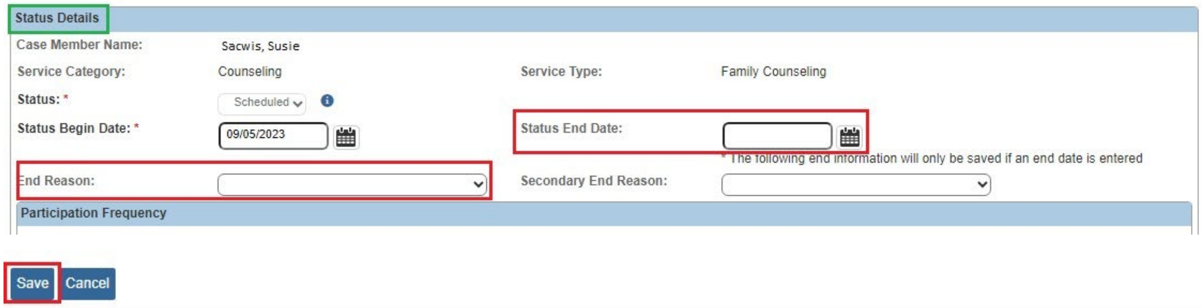
The **Service Information** screen appears.

3. Click the appropriate **Edit** link in the **Member Service Status History** section.



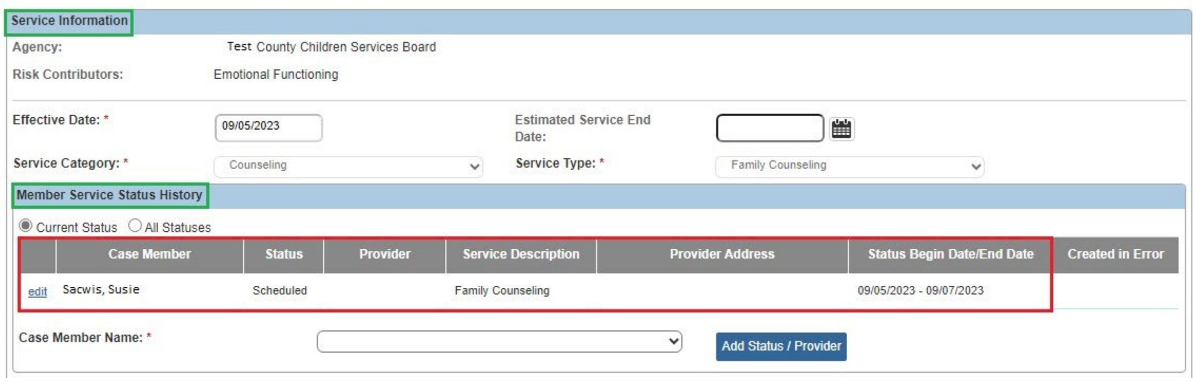
The **Status Details** screen appears.

4. In the **Status End Date** field, enter the status end date.
5. In the **End Reason** field, select an end reason from the drop-down list.
6. Click the **Save** button at the bottom of the screen.



The **Service Information** screen appears displaying the end date in the **Status Begin Date / End Date** column.

7. Click the **Save** button again to save the record.



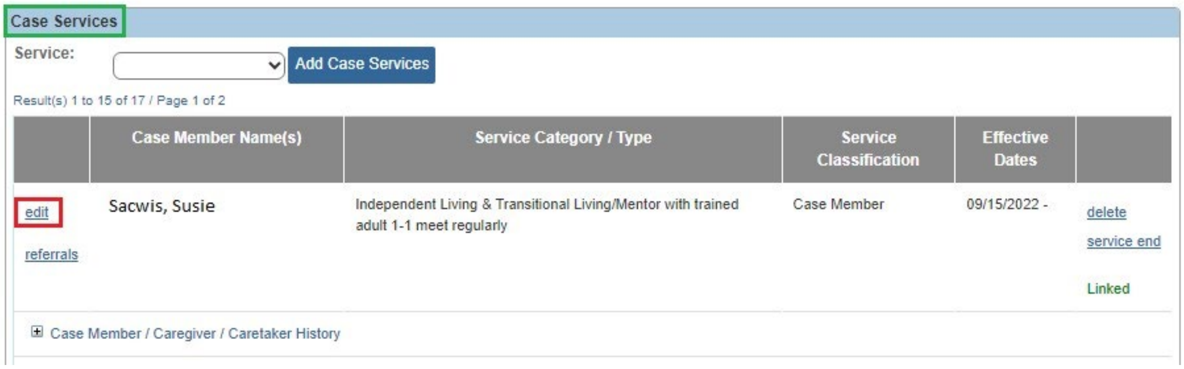
The **Case Services** screen appears.

Completing a Service Review

This sub-section discusses completing a service review that is done outside of a case review.

1. On the **Case Services** screen for the case member, locate the appropriate row.
2. Click the **Edit** link.

Managing Case Services

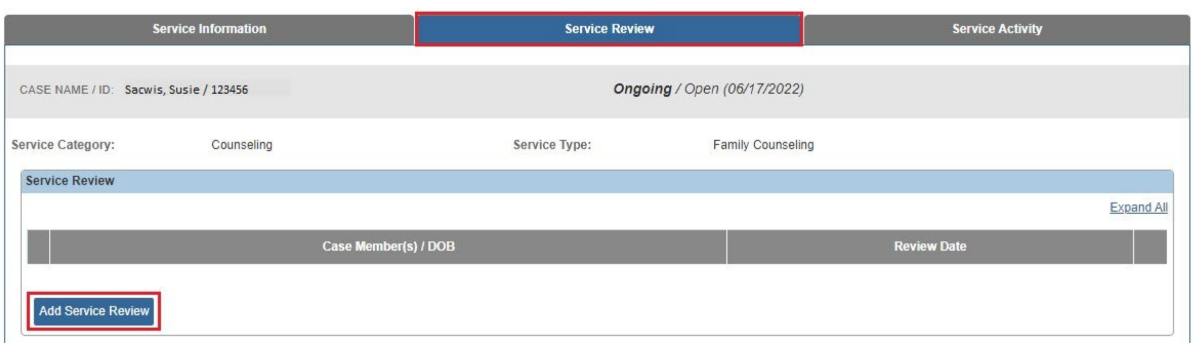


The **Service Information** screen appears.

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

Important: From this tab, you can **edit a current** service review or **add a new** service review.

4. To edit an existing service review, click the **Edit** link in the appropriate row.
5. To add a service review, click the **Add Service Review** button.



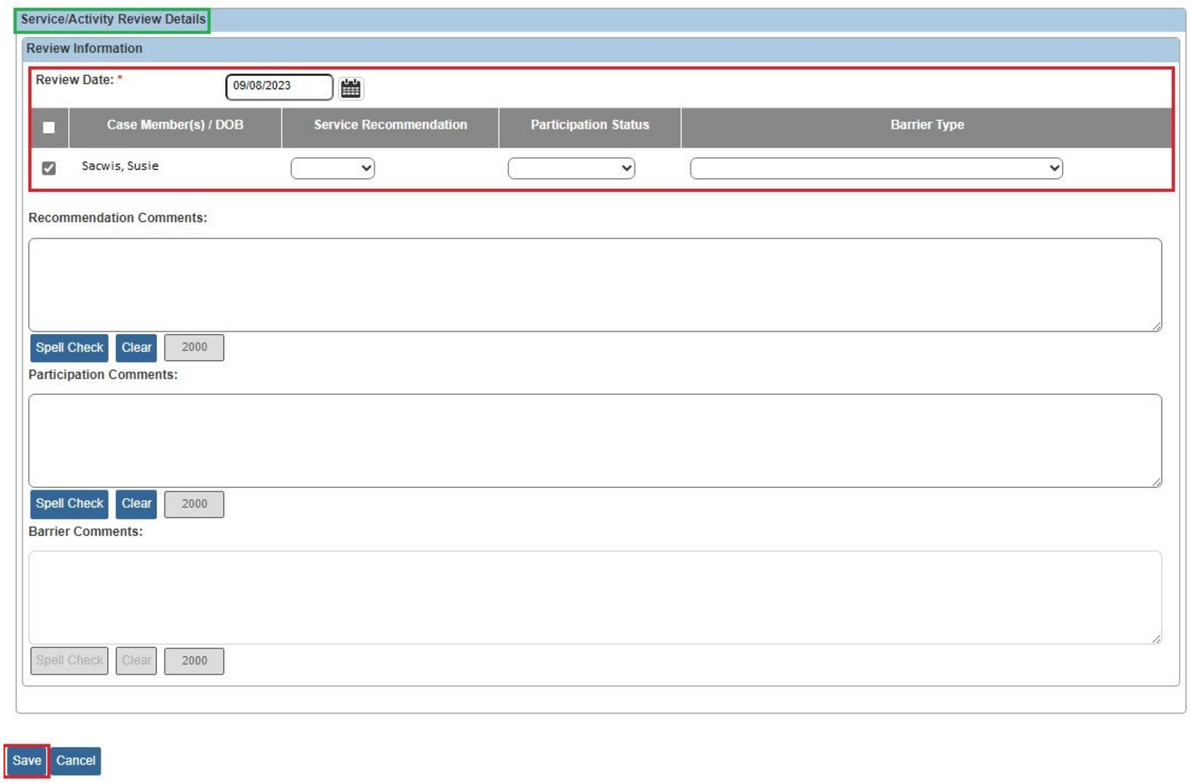
The **Service / Activity Review Details** screen appears.

6. In the **Review Date** field, select the appropriate date. This field defaults to the current date.
7. Select the check box next to the appropriate case member(s) name.

Important:

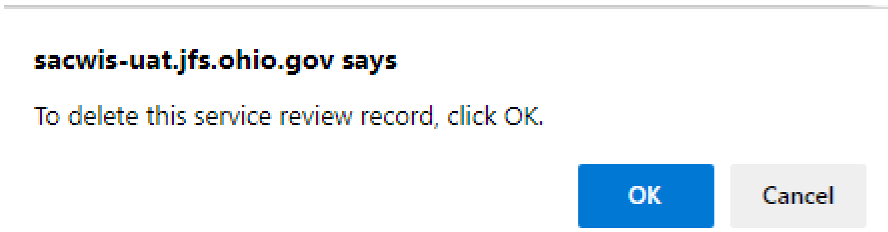
- If all the case members need to be selected, click the check box in the header to select all.
- More than one case member can be selected.

8. In the **Service Recommendation** column, choose from the drop-down list. The choices are **Continue**, **Modify**, or **Terminate**.
9. In the **Barrier Type** column, select the appropriate barrier.
10. If needed, type a recommendation into the **Recommendation Comments** field. **If barriers exist, this field is required.**
11. Click the **Save** button.



The **Service Review** screen appears displaying the new record.

12. If needed, click the **Delete** link to delete the current record.
13. When this warning message appears, click the **OK** button.
14.



15. If needed, click the **View** or **Edit** links to view or further edit the content.

16. Click the **Save** button at the bottom of the screen.

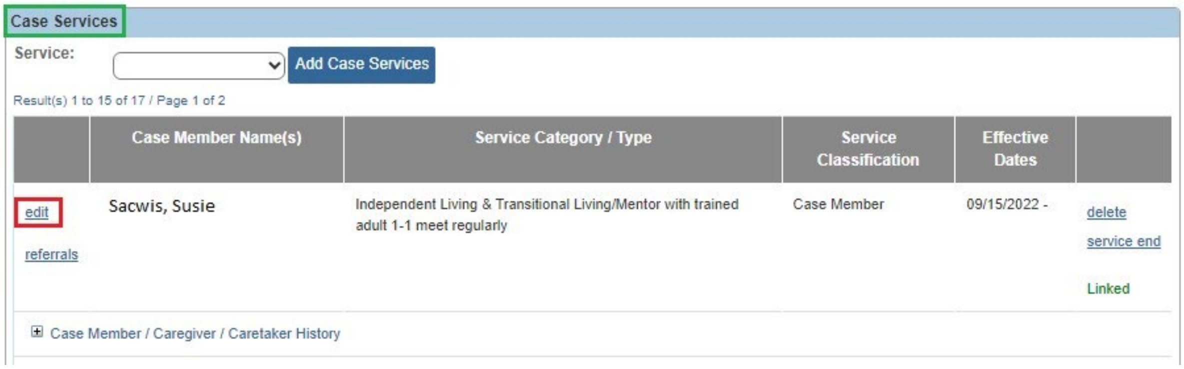
The **Case Services** screen appears.

Adding a Service Activity Record

At a minimum, **a service activity (participation status) is required to be added once during every case review period**. To do so, complete the following steps:

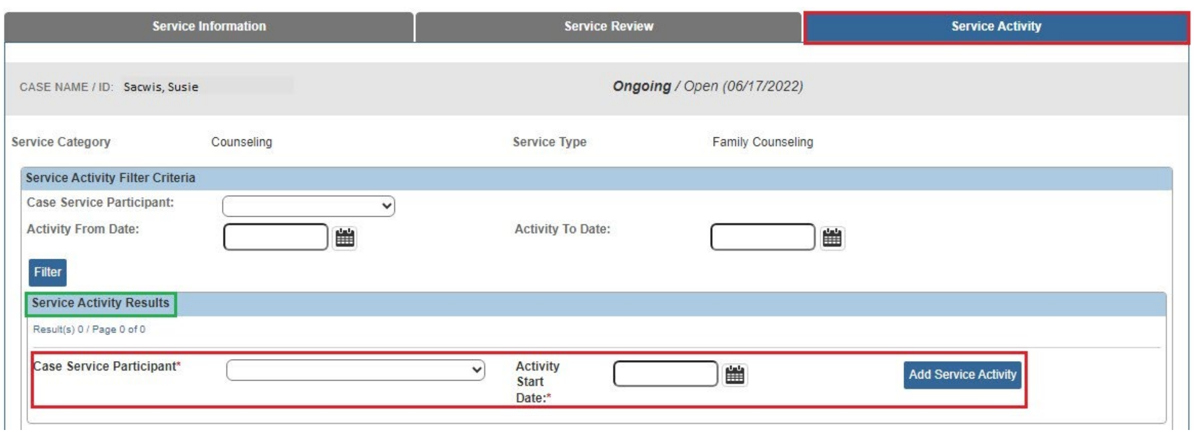
1. On the **Case Services** screen for the case member, locate the appropriate row.
2. Click the **Edit** link.

Managing Case Services



The **Service Information** screen appears.

3. Click the **Service Activity** tab. The **Service Activity Filter Criteria** screen appears displaying the **Service Activity Results** section below.
4. In the **Case Service Participant** field (near the bottom), select the appropriate name from the drop-down list (only available for **Scheduled** or **Provided** status records).
5. In the **Activity Start Date** field, enter the appropriate date.
6. Click the **Add Service Activity** button.



The **Add Service Activity** screen appears displaying a calendar as shown below.

Important: Since May 1st was selected in the **Activity Start Date** field on the previous screen, the calendar only displays from that start date to the current date. The other dates are grayed out. The calendar only displays a maximum of 90 days.

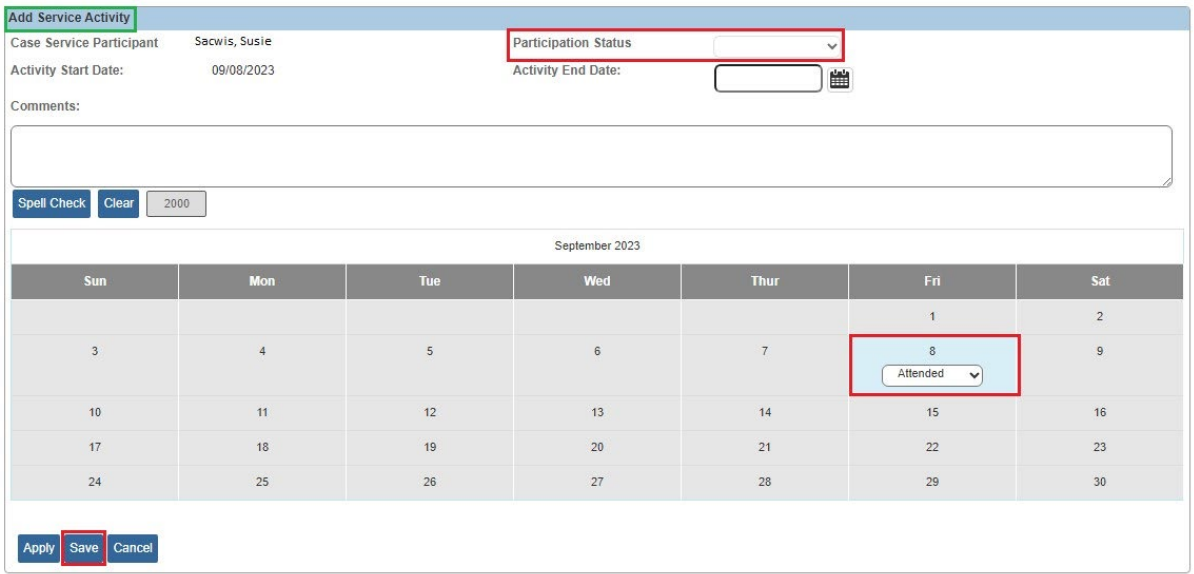
7. In the **Participation Status** field, select the appropriate choice from the drop-down list. The choices are **Attended All**, **Partial Attendance**, and **Not Attended**.

Managing Case Services

Important:

- The participation status must be added once during every case review period.
- Completing the **Participation Status** field is required to save the record; completing the calendar is not.

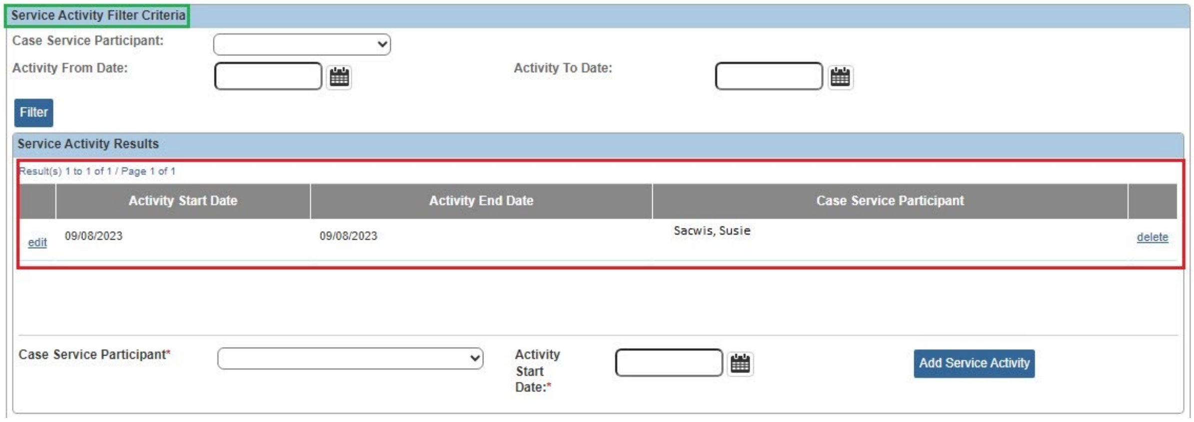
8. If needed, for each enabled calendar day in the **Calendar** section, select **Attended** or **Not Attended** from the drop-down list.



Important: You can also apply this information to other case members within that service by completing these steps:

9. Scroll to the **Apply Other Members** section (below the calendar).
10. Select the appropriate case member check box(es).
11. Click the **Save** button.

The **Service Activity Filter Criteria** screen appears displaying the **Service Activity Results** section below it. The selected case member(s) now have a new service activity record as shown below.



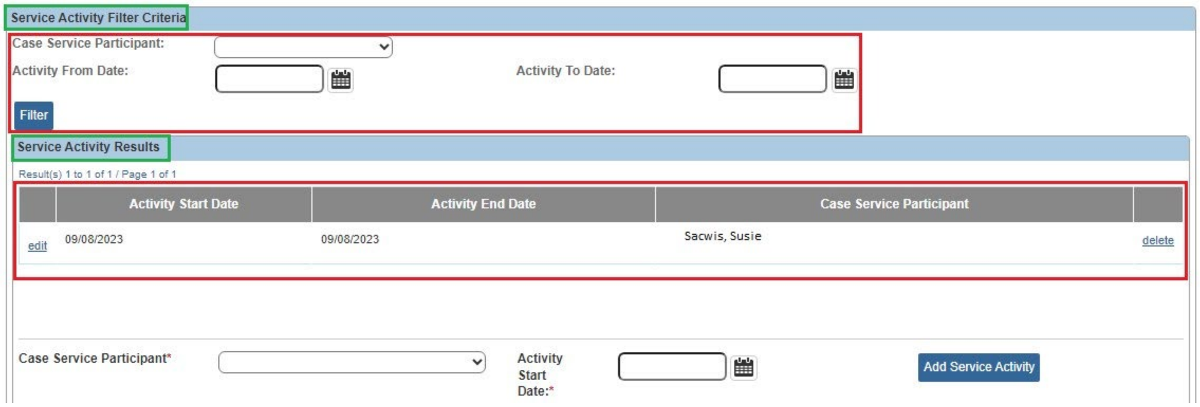
From this screen:

12. To edit a record, click the **Edit** link on the left. After editing the record, click the **OK** button again.
13. To delete a record, click the **Delete** link on the right. Then, click the **OK** button.

Filtering Service Activity Records

To filter the service activity records by **case member** or **activity from and to date**, complete the following steps:

1. Navigate to the **Service Activity** tab (steps discussed previously).
2. At the top of the screen, select the case member's name from the **Case Service Participant** field drop-down list.
3. In the **Activity From Date** field, enter the appropriate date.
4. In the **Activity To Date** field, enter the appropriate date.
5. Click the **Filter** button.



The filtered results appear in the **Service Activity Results** section as shown above.

6. If needed, click the **Cancel** button to return to the **Case Services** screen.

Linking a Case Service to a Work Item

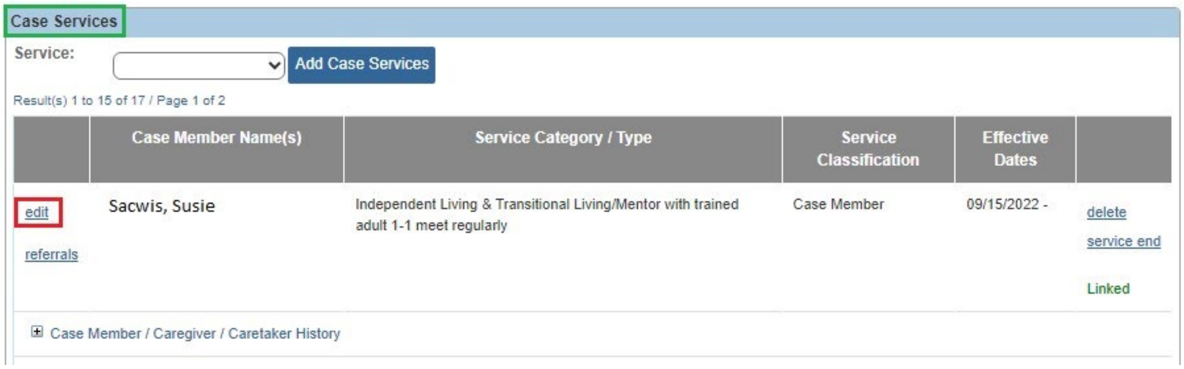
You can link a case service to a work item in Ohio SACWIS. Although case service functionality in some parts of the system have changed, **the current steps for linking a case service are still the same as they were in previous versions of Ohio SACWIS.**

You can also link a case service for one member, or many members as shown below.

Example: If you navigate to the **Case Services** screen through a work item to link case services, you can select every case member for this service by following these steps.

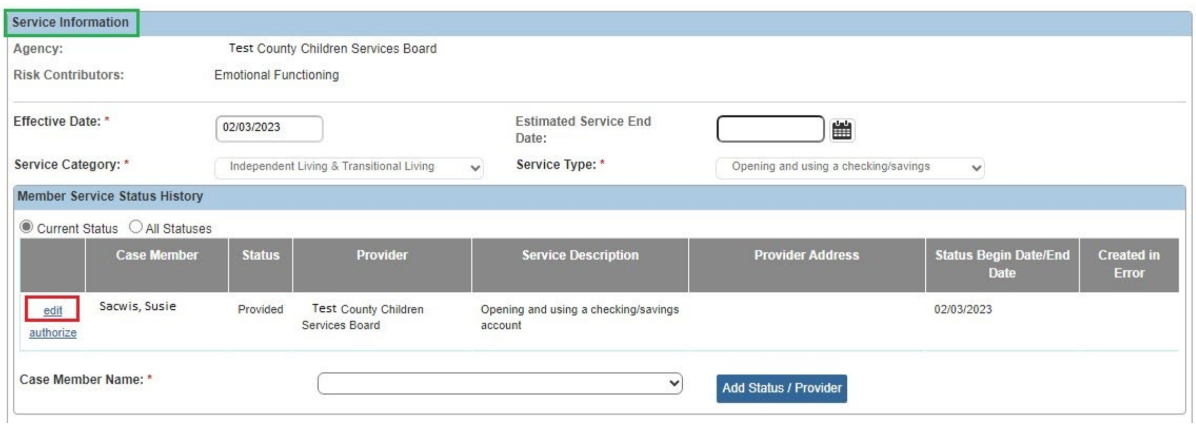
1. On the **Case Services** screen locate the appropriate row for the case service you want to link.
2. Click the **Edit** link.

Managing Case Services



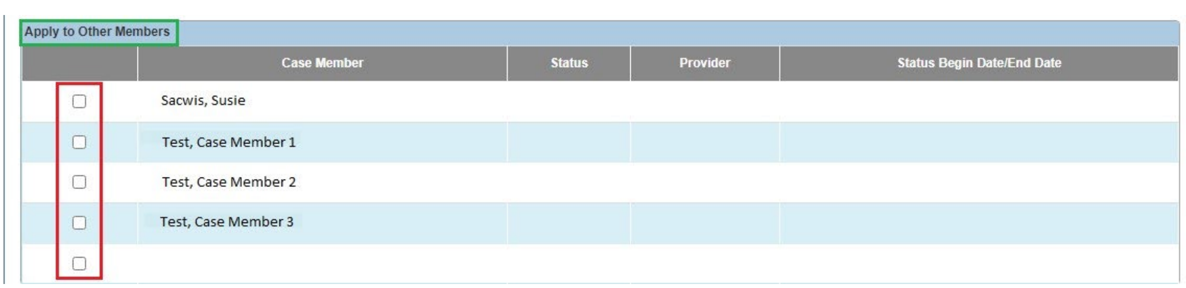
The **Service Information** screen appears.

3. Click the appropriate **Edit** link in the **Member Service Status History** section.



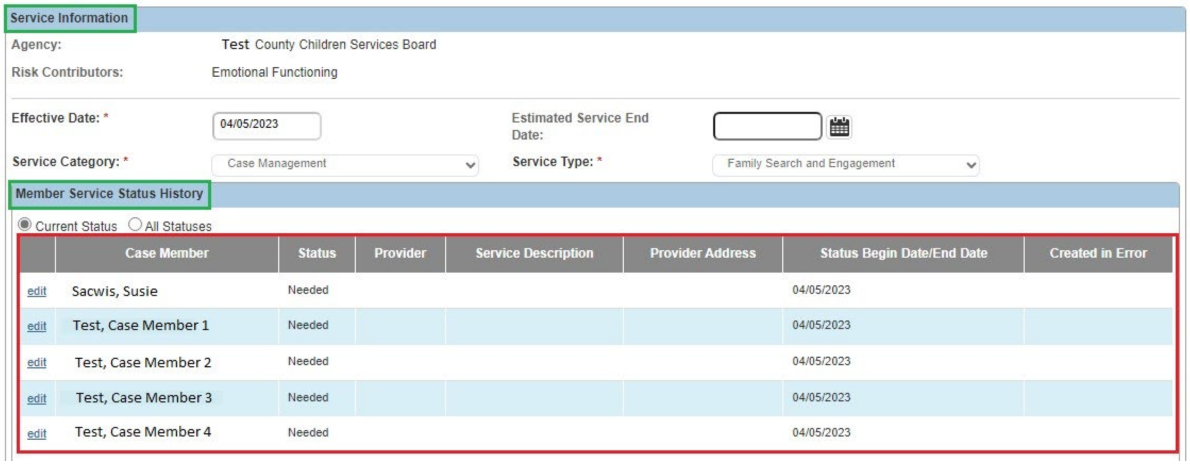
The **Status Details** screen appears.

4. Scroll to the bottom on the page. Select which members need added to the **Case Service** by checking the checkbox next to the appropriate names.
5. Click the **Save** button.



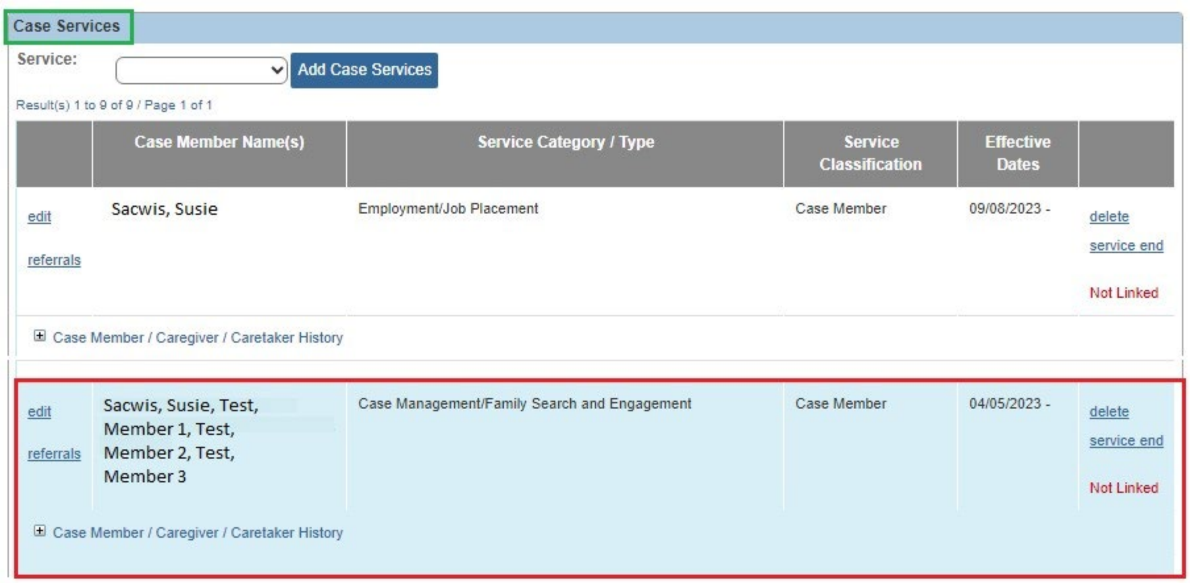
Managing Case Services

The **Service Information** screen appears showing the saved Members within the Member Service Status History grid.



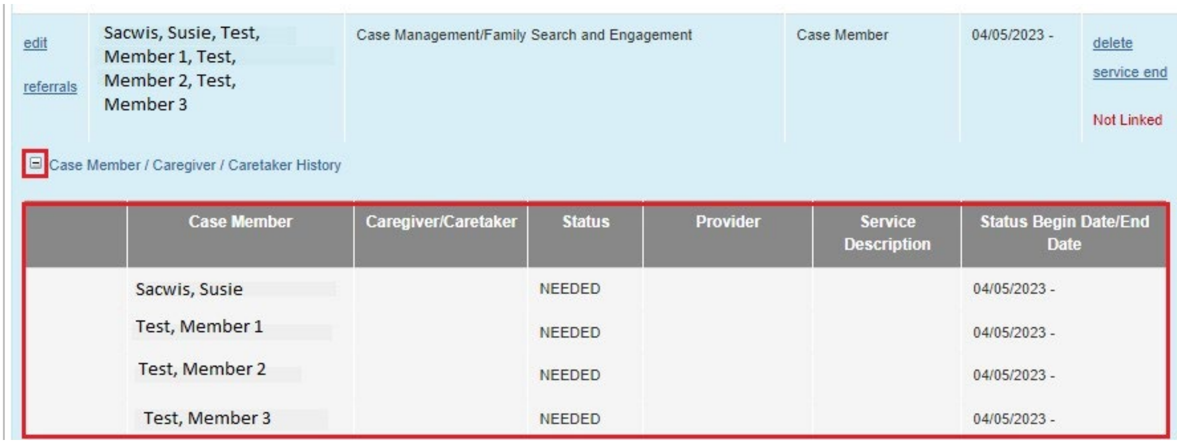
6. Click the **Save** button.

The **Case Services** screen appears showing the saved members.



As shown above, the screen displays **all the case members**.

If you expand the **Case Member / Caregiver / Caretaker History** link, the screen displays the selected member (or members) and their status for the Case Service as shown below:



Case Closure

When closing a case, you must end date all paid case services. The system will automatically end date all non-paid case services with the case closure date. This is the same functionality that currently exists in Ohio SACWIS.

Case Services with a Status of Planned

For case services on closed cases or previously opened episodes that have a case member service status record of **Planned**, the case member service status record will remain as **Planned** in the system.

For case services on open cases that have a case member service status record of **Planned**, the case member service status record will be changed to **Referred** in the system.

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