

# Creating a Family & Permanency Team



**Knowledge Base Article**

# Creating a Family & Permanency Team

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# Creating a Family & Permanency Team

## Overview

This article provides step-by-step instruction for creating a Family & Permanency Team. Although the Family & Permanency Team record is required for youth placed into a Qualified Residential Treatment Provider (QRTF) Placement, the record can be created for any Active Case Participant in Ohio SACWIS.

**Note:** For a child in a Quality Residential Treatment Program (QRTF), the team must consist of appropriate biological/adoptive family members, relatives, non-relatives, and kin, as well as professionals who are a resource to the child and their family, including but not limited to, teachers, clergy, youth support persons, and/or medical or mental health providers who have treated the child.

A Family & Permanency Team is child specific and will display in all cases in which the child is a member. Within a Bridges Case or a Young Adult Services Case, record is view only, if one existed for the youth.

1. From the Ohio SACWIS home page, navigate to the **Case Overview** screen.
2. Click, **Child Location/ICCA** in the navigation pane.

The screenshot displays the Ohio SACWIS Case Overview interface. At the top, there is a navigation bar with tabs for Home, Intake, Case (selected), Provider, Financial, and Administration. Below this is a sub-navigation bar with Workload (selected), Court Calendar, and Placement Requests. The left sidebar contains a list of navigation options, with 'Case Overview' and 'Child Location/ICCA' highlighted. The main content area shows the following details:

- CASE NAME / ID: *Ongoing*
- Sacwis, Susie / 123456 *Open (04/04/2023)*
- ADDRESS: 123 Test Rd, Test Oh 12345
- CONTACT:
- AGENCY: *Test County Children Services Board*
- PRIMARY WORKER: *Test Worker* (with [Assign Worker](#) link)
- SUPERVISOR(S): *Test Supervisor*

Below the details is a 'Case Actions' section with a warning: 'Case members have unspecified relationships.' At the bottom, there is a table of actions:

Action Items	Case Alerts	Dashboard	Assignments / Eligibility
Result(s) 1 to 11 of 14 / Page 1 of 1			
11/28/2023	<span style="color: red;">!</span> Case Review due		Actions... ▾
01/09/2024	<span style="color: red;">!</span> Previously Adopted value needs updating		Actions... ▾

# Creating a Family & Permanency Team

The Child Location tab screen appears.

3. Select the **Family & Permanency Team** tab.

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  
Pre-Adoptive Staffing/Matching Conference  
**Child Location/ICCA**

Child Location   ICCA   **Family & Permanency Team**   QRTP Assessment

**Child Location Records Filter Criteria**

Child Name:

Date Range:  -   
From Begin Date   To Begin Date

Status:

Include Created in Error    Include Historical  
 Include Non-Custodial Parent    Include Child Location Records for Inactive Members

The **Family & Permanency Team** tab screen appears.

**Important:** When first navigating to this page; the Filter results is defaulted to **Active Case Members Under Age 22**. All active child(ren) case members will display on this page regardless of whether the child is in a QRTP placement setting. This functionality allows the flexibility for Team Planning and the creation of a Child’s Family & Permanency Team prior to the child being placed in a QRTP Placement Setting; if applicable.

1. Click the **edit** link for the desired child.

Child Location   ICCA   **Family & Permanency Team**   QRTP / CANS Requirements

**Family & Permanency Team Filter Criteria**

Filter Results by:

Active Case Members Under Age 22    All Active Case Members    All Active and Inactive Case Members

**Filter**

**Family & Permanency Team Summary**

*For a child in a Qualified Residential Treatment Program (QRTP), the team must consist of appropriate biological/adoptive family members, relatives, non-relatives, and kin, as well as professionals who are a resource to the child and their family, including but not limited to, teachers, clergy, youth support persons, and/or medical or mental health providers who have treated the child.*

[Expand All](#)

**edit**   [Sacwis, Steven / 123456](#)   - Male Age 8, DOB 09/01/2016  
[Active Team Members](#) ▾

## Creating a Family & Permanency Team

### Creating a Family & Permanency Team

The **Family & Permanency Team Members** screen appears.

Upon initial access of this page, there will be no Active Permanency Team Members.

**Note:** The System will automatically list all active and inactive Case Members, Associated Persons, and Independent Living Contacts in this dropdown. The list will exclude the child in focus and exclude any persons already in the Family & Permanency Team List.

**Note:** To add persons to the child Permanency team that are not currently in the drop-down menu, search persons available in Ohio SACWIS. Please refer to the [Using Search Functionality](#) KBA, for additional details.

2. Select a name from the **Case Members / Associated Persons / Contacts** drop-down menu.

3. Click **Add**.

OR,

4. Click **Person Search**.

Permanency Team Members

Include Inactive

No Permanency Team Members have been recorded for this child.

Case Members / Associated Persons / Contacts:

Oyl, Olive

Add

- OR -

Person Search

Close

The **Family & Permanency Team Member Details** screen appears.

1. Make a selection from the **Relationship to Youth** drop down menu.

# Creating a Family & Permanency Team

## Family & Permanency Team Member Details

Member Name:  
Test Member, Name / 123455

Relationship to Youth: \*  
Biological Sister

Primary Address:  
123 Test Rd, Test Oh  
12345

Contact:

2. Select from, **Do you want to make this person active in the Independent Living Contact Directory?**
3. If **Yes** is selected, check if either applies making Permanency Team Member as a **Permanent Adult Connection** or **Youth Support Person**.
  - A **Permanent Connection** is defined as having a relationship that is characterized by these five points: parenting, life-long intent, belonging, status, and unconditional commitment.
4. Select **Provide Support(s) of** (Optional)
5. Click **Add**
6. If **Other** is selected as Provide Support, then enter **Other Support** narrative.
7. Enter **Other Information**, Optional.
8. Click **Save**.

Do you want to make this person active in the Independent Living Contact Directory?  
Yes

- Select if either applies:
- Permanent Adult Connection ⓘ
  - Youth Support Person ⓘ

Provide Support(s) of:	Selected:
<input type="text" value=""/> <input type="button" value="Add All"/> <input type="button" value="Add"/>	<input type="button" value="Remove"/> <input type="button" value="Remove All"/> <input type="text" value=""/>
Church / Religious Friend	
Counseling Support Person	
Emergency Contact Person	
Housing	
Living Expenses	
Mentorship	
Other	
Provide Description	

## Creating a Family & Permanency Team

Other Information: [\(expand full screen\)](#)

✓ ABC

2000

Save

Cancel

### Important:

#### Permanent Adult Connection

Displays when the Member is also in the Independent Living Contact Directory for the child with a role of Permanent Adult Connection.

#### Youth Support Person

Displays when the Member is also in the Independent Living Contact Directory for the child with a role of Permanent Adult Connection.

The **Family & Permanency Team** screen appears indicating your data has been saved.

✔ Your data has been saved. ✕

CASE NAME / ID: Sacwis, Steven / 123456	Adoption / Open (04/03/2024)
CHILD NAME / ID: Sacwis, Steven / 123456	DOB: 09/01/2016

#### Family & Permanency Team Members

Include Inactive

<a href="#">edit</a>	Sacwis, Susie - Biological Sister 123 Test Rd. Test Oh 12345	<div style="border: 1px solid green; background-color: #90ee90; padding: 2px; display: inline-block;">ACTIVE</div>
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Case Members / Associated Persons / Contacts:

~ OR ~

Complete Steps 1-5 to additional Family & Permanency Team Members.

**Notice:** Every time a new Family & Permanency Team Member has been added, the system automatically defaults their status to Active.

## Creating a Family & Permanency Team

1. Click **Close** once all desired Family & Permanency Team Members has been added.

CASE NAME / ID: Sacwis, Steven / 123456 Adoption / Open (04/03/2024)

CHILD NAME / ID: Sacwis, Steven / 123456 DOB: 09/01/2016

### Family & Permanency Team Members

Include Inactive

[edit](#) Sacwis, Susie - Biological Sister  
123 Test Rd, Test Oh 12345 ACTIVE

Case Members / Associated Persons / Contacts:

Add ~ OR ~

The **Family & Permanency Team Summary List** screen displays.

**Family & Permanency Team Summary**

*For a child in a Qualified Residential Treatment Program (Q RTP), the team must consist of appropriate biological/adoptive family members, relatives, non-relatives, and kin, as well as professionals who are a resource to the child and their family, including but not limited to, teachers, clergy, youth support persons, and/or medical or mental health providers who have treated the child.*

[Expand All](#)

<a href="#">edit</a>	<a href="#">Steven, Sacwis / 123456</a> - Male Age 8, DOB 09/01/2016	
	<a href="#">Active Team Members</a> ▾	
<a href="#">edit</a>	<a href="#">Sacwis, Susie / 123455</a> - Female Age 9, DOB 10/05/2015	
	<a href="#">Active Team Members</a> ▾	

## Quick View of Family & Permanency Team Members & Updating a Permanency Team Members and Status

**Note:** Each added Family & Permanency Team Member will display as Active once added.

1. For each Case Member, click the **Active Team Members** drawer to expand

# Creating a Family & Permanency Team

the Active Members.

2. Click **edit** to edit the desired youth's record.

The screenshot shows a sidebar menu on the left with options like 'Placement/CCA', 'Residential Treatment Information', 'Independent Living', etc. The main area displays a list of youth records. Each record includes an 'edit' link, a name and ID, age, and date of birth. The record for 'Dinkley, Velma / 14570987' is highlighted with a red box around the 'edit' link and a green box around the 'Active Team Members' dropdown menu, which currently shows 'No Active Team Members'. Other records include 'Disney, Elsa / 28255719' and 'Oyl, Olive / 27766656'.

The **Family & Permanency Team Members** screen displays.

The screenshot shows the 'Family & Permanency Team Filter Criteria' section. It includes a checkbox for 'Include Inactive' which is checked. Below this is a list of team members with their roles and contact information. Each member has an 'ACTIVE' toggle button. The toggle for 'Rabbit, Jessica - Relative' is highlighted with a green box. At the bottom, there is a search bar with an 'Add' button, a '- OR -' separator, and a 'Person Search' button. A 'Close' button is located at the very bottom of the interface.

**Note:** The Active / Inactive buttons are toggle buttons. Click the button to change the status from Inactive to Active and vice versa.

The **Include Inactive checkbox** will be checked when accessing this page. When checked, both active and inactive status Family & Permanency Team members display in

## Creating a Family & Permanency Team

the list.

3. Click the Active / Inactive toggle to update each Family & Permanency Team Member's status as desired.



Will display when the current status of the Family & Permanency Team Member is Inactive.



Will display when the current status of the Family & Permanency Team Member is Active.

4. Repeat steps in above sections to add additional Family & Permanency Team Members
5. Click **Close**.

The **Family & Permanency Team Summary List** screen displays.

## Generating a Family & Permanency Team Report

This report can be printed in two (2) versions.

- Full contact information
  - Redacted personal (contact information)
1. Click **Report Icon** for the desired child from the Family & Permanency Team Filter Criteria page.

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Child Location    ICCA    **Family & Permanency Team**    QRTP / CANS Requirements

## Family & Permanency Team Filter Criteria

Filter Results by:

Active Case Members Under Age 22

All Active Case Members

All Active and Inactive Case Members

**Filter**

## Family & Permanency Team Summary

*For a child in a Qualified Residential Treatment Program (QRTP), the team must consist of appropriate biological/adoptive family members, relatives, non-relatives, and kin, as well as professionals who are a resource to the child and their family, including but not limited to, teachers, clergy, youth support persons, and/or medical or mental health providers who have treated the child.*

[Expand All](#)

[edit](#)    [Sacwis, Steven / 123456](#)    - Male Age 8, DOB 09/01/2016  
[Active Team Members](#) ▾



The **Document Details** grid appears.

1. Click the **Generate Report** button.

Case»Workload»Reports

Document Details			
Document Category:	Document Title:	Family & Permanency Team Member Report	
Work-Item ID:	Work-Item Reference:	Sacwis, Steven	
Task ID:	Task Reference:		
Document History			
ID	Date Created	Employee ID	Name
Document History			
<b>Generate Report</b>			

The **Family & Permanency Team Member Report** grid appears.

Click the Include Family & Permanency Team Member's Contact Information? Checkbox (Optional).

1. Click **Generate Report** button.

The report generate.

## Creating a Family & Permanency Team

2. Click **Save**.

Family & Permanency Team Member Report

Include Family & Permanency Team Member's Contact Information?

Generate Report Cancel

For further information, please see the following articles:

- [Recording a Placement Record](#)
- [Creating an Individual Child Care Agreement](#)
- [Using Search Functionality](#)

If you have additional questions pertaining to this Deployment Communication, please contact the [Customer Care Center](#).