TEAM Ohio

Taking Early Action Matters

PCSA User Guide

Table of Contents

Overview

This guide describes how to use **TEAM Ohio** as a PCSA Worker/Supervisor. This portal was created to allow Mandated Reporters to submit non-emergent referrals of suspected child abuse, neglect and/or dependency online without having to place a phone call to a PCSA.

Please make sure to refer to this section if you use both **ODAPS** and **TEAM Ohio**.

Who is a Mandated Reporter?

Mandated reporters are people required by law to report suspected child abuse, neglect and/or dependency. Refer to Section 2151.421 of the Ohio Revised Code for a complete list. Examples of Ohio mandated reporters include, but are not limited to:

Attorney	County Humane Society	Law Enforcement
CASA Volunteer	Agent	Medical Professional
Children's Camp	Day Care Provider and/or	Mental Health
Employee	Employee	Professional
Clergy	DD Personnel	PCSA Employee
Coroner	Foster Parent	School Employee
Court Personnel	Guardian ad Litem	Social Worker

Important: Mandated Reporters using this portal have been informed that if they believe a child is in immediate danger of serious harm, to call law enforcement and then the local children services agency.

Portal Process

TEAM Ohio guides referents through a series of questions to gather the information for a complete intake. Once submitted, the referent will receive an email notification that their information has been sent to the Public Children Services Agency (PCSA) they designated. The PCSA reviews the referral within 24 hours of receipt, determines whether the reported concerns are a mandated report, meet state guidelines for agency involvement and if law enforcement notification is required. When a decision has been made on the referral, an email notification will be sent to the referent with the updated status. In later upgrades to TEAM Ohio, if agency involvement is initiated, an email notification will be sent to the referent at conclusion of the involvement, eliminating the need for the required notifications to be manually sent to Mandated Reporters. Currently, PCSAs still need to manually send Mandated Reporter notifications.

Gaining Access to TEAM Ohio

1. To gain access to the TEAM Ohio portal, the role in the Digital JFS 7078 in myOhio must be requested for you. Select the appropriate role based on the type of agency employee.

   Worker: EIDMX_JFS_C-OFC-TEAM Ohio Agency Worker

   Supervisor: EIDMX_JFS_C-OFC-TEAM Ohio Agency Supervisor

   Note: A single user cannot have both roles associated to their OHID. If you are provisioned as a TEAM Ohio Agency Worker but later get promoted to supervisor, you will need to request that the worker role be removed when requesting the supervisor role and vice versa.

2. If the user needs the ability to view restricted intakes within TEAM Ohio, indicate this in the 'Additional Request Details' field on the digital JFS 07078.

3. Users will log into the Salesforce platform using their OH|ID and password created after being granted access into the **TEAM Ohio** site. It's important to use the link provided for log-in to ensure you are navigated to the TEAM Ohio application.
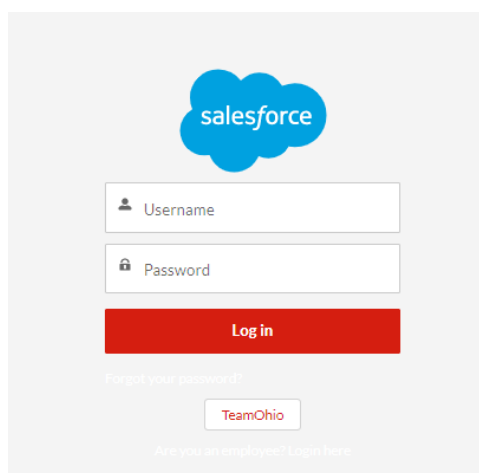

Important Information for Users of ODAPS and TEAM Ohio/OCAF

If you have an ODAPS account, you will not be able to log into TEAM Ohio or OCAF using your OHID.

1. A separate email will be sent to you with a new username you will use for TEAM Ohio. Your new username will be formatted as an email address. **This email is not a scam!**

2. You will click the reset password link. This will need to be completed within 24 hours of receiving the reset password email. If it is beyond the 24 hours, please email SACWIS_ACCESS@childrenandyouth.ohio.gov to request it be resent.

3. Upon logging in after you reset the password, you will go to the Salesforce App below, select "**Log in with a Different Account**", then enter the username sent to you and your password.
   You can also navigate to this site by visiting: https://odjfs2.my.salesforce.com/

Department of Children & Youth

TEAM Ohio User Guide
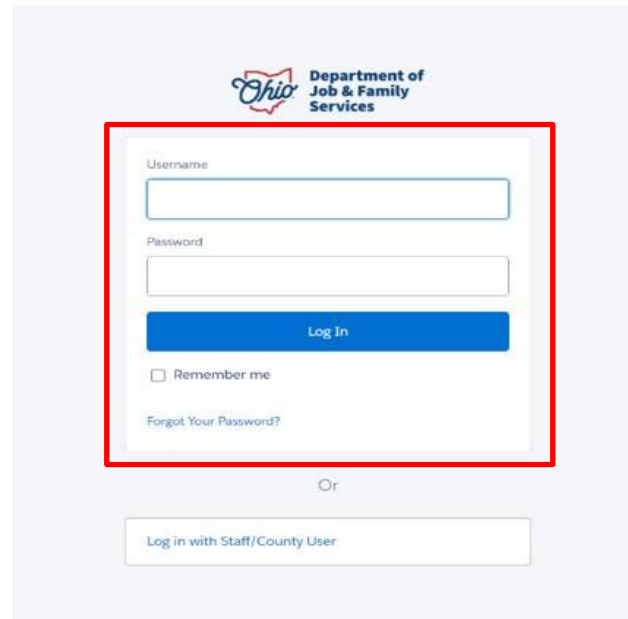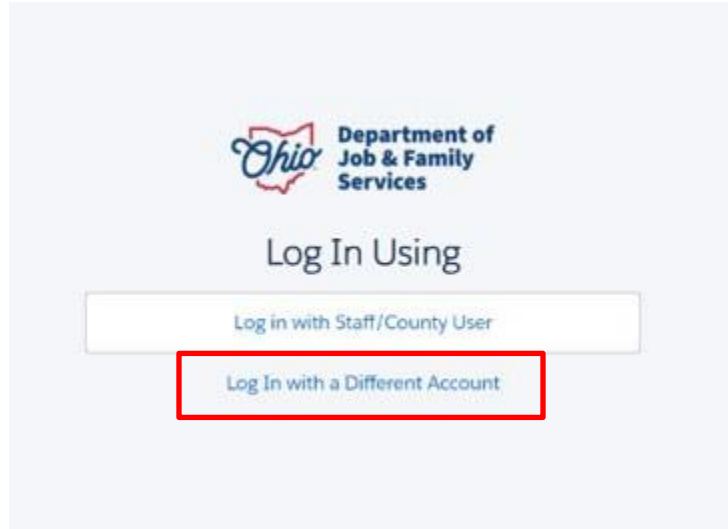
4. The resulting screen will display an area to enter your **TEAM Ohio** Username and Password.

   Note: If you have issues signing in with your TEAM Ohio Username, please clear your cache, open a new browser, and try again.

   - These same instructions will apply if you are trying to access OCAF and have an ODAPS Account.

Home Page and Setting View

1. Upon successful log-in, the **Home** page will appear.

Department of Children & Youth

1. If you work within multiple applications on the Salesforce platform, you may need to switch between them using the 9-dot square App Launcher in the upper left-hand corner of the screen. If you click this area, it will display a list of all applications you have access to. Choose **TEAM Ohio** to work within this app.

Last Revised: 07/30/2024

2. The landing page of **TEAM Ohio** will contain a list of available **Case Views**. There will be seven available **Public List Views** for your agency:

    a. <u>**All TEAM Ohio Cases**</u>- This list will display all TEAM Ohio Cases in every county. This is a shared list between all agencies and is viewable by all TEAM Ohio Users at every agency.

    b. <u>**TEAM Ohio (County Name) County Queue**</u>- This list will display cases in Submitted status that have not been assigned yet. This list will be viewable by TEAM Ohio Users at your agency.

    c. <u>**All TEAM Ohio (County Name) County Cases**</u>- This list will display all TEAM Ohio Cases for only your agency, regardless of status and/or assignment. This list will be viewable by TEAM Ohio Users at your agency.

    d. <u>**My TEAM Ohio Cases**</u>- This list will display all TEAM Ohio Cases assigned to you, regardless of their screening decision status. This list will only be viewable by you, the signed in TEAM Ohio User.

    e. <u>**My Open TEAM Ohio Cases**</u>- This list will display all TEAM Ohio Cases assigned to you that are in Received status and have not had a screening decision selected for them yet. This list will only be viewable by you, the signed in TEAM Ohio User.

    f. <u>**(County Name) County Ready for Screening**</u>- This list will display all TEAM Ohio Cases that are in Received status and have the SACWIS Entry Completed Checkbox checked, regardless of assignment. This list will be viewable by TEAM Ohio Users at your agency.

    g. <u>**TEAM Ohio (County Name) County Screened Cases**</u>- This list will display all TEAM Ohio Cases that have a screening decision entered (Screened In, Screened Out, Referred to Other County), regardless of assignment. This list will be viewable by TEAM Ohio Users at your agency.

Click the arrow next to the header to view these options. To set your preferred view, click on the list view of your choice and then click the thumbtack icon to 'pin' the list view as your default.

Note: "Franklin" list views were used as an example below, but each agency will see their agency name for each agency specific list.

Assigning Referrals

1. From the **TEAM Ohio PCSA County Queue** view, the **Cases** will display in a list, with a **Case Number**, **Contact Name** (referent), **Subject**, **Status**, **Priority**, **Date/Time Opened, Date/Time Submitted** and **Case Owner Alias**. The arrow on the right will allow you to **Edit** or **Change Owner** of a **Case**.

Department of
Children & Youth

2. To assign a **Case** to yourself, select the check box next to the case number to be assigned. Then in the upper right corner click the **Accept** button. If you are a supervisor and wish to assign a case to another worker or supervisor, check the box next to the case number. In the upper right corner select the **Change Case Owner** button. In the search box, choose to search users, and type the name of the worker you wish to assign. This record will now show under the **My Cases** list view if assigned to you.

Viewing a Case

- Click on the **Case Number hyperlink** to view the record. The **Case** will display in a new tab. **Important:** The **Case Number** is specific to Salesforce and will be different from any Ohio SACWIS Case or Intake ID.

The record defaults to the **Case Details** tab. This section provides information about **Contact Name** (Referent), **Status**, **County of Complaint, Priority**, **Restrictions check box, SACWIS Entry Completed check box and the Confirmed Mandated Referral box.**

Note: Values for **SACWIS Entry Completed** and **Confirm Mandated Referral** will be required before a Screening Decision can be made.

    a. Selecting **Yes** for **Confirm Mandated Referral** will confirm it meets mandated referral requirements and the reporter will receive the notifications required by OAC.

    b. Select **No** when you have determined the referral does not meet OAC requirements of a mandated referral. Information about the referral will not be provided to the reporter.

Ohio Department of Children & Youth

Status Bar and Screening Decision

- This area shows the status of the referral and gives the user the ability to update the status. The different statuses include:

  - **Submitted**: which is a referral that has been sent to a PCSA, but not assigned or reviewed.
  - **Received**: which is a referral that has been assigned to a screener or supervisor for research and entry into Ohio SACWIS.
  - **Closed**: for when the screening decision has been made and the referral has been **Screened In**, **Screened Out**, or **Referred to Other County**.

- When you are ready to select a **Closed** status, you will see the pop-up window to enter your information is dynamic, based on your **Screening Decision**.
  - Before you can save your Screening Decision, you will need to confirm the referral is mandated and indicate that the referral has been entered in SACWIS.

Edit Dependencies

* Status

Screened In ▼

Confirm Mandated Referral

--None-- ▼

County Sent To

--None-- ▼

Screening Pathway

--None-- ▼

Cancel   Done

- If your Screening Decision is **Screened In**, a value for **Screening Pathway** will be required: **Traditional/Alternative Response**.
- If your Screening Decision is **Referred to Other County**, a value for **County Sent To** will be required. There is an option in the dropdown for **Out of State PCSA**. If the referral is being sent out of state, a new field will appear under the **Basic Information** tab where you can enter the state it is being sent to.
  - Selecting **Referred to Other County** allows the mandated reporter to know that their information was sent to another jurisdiction, and not just the typical "Screened Out" notification – this field is only informational at this time. It is being looked at for an enhancement within Ohio SACWIS.

- Two additional statuses that are present but will not be seen or used by PCSAs include "in progress" and "canceled". In progress are new referrals that have been started but not completed and canceled are referrals that were started but the reporter chose to cancel prior to submitting.

  o All these statuses are only visible to the mandated reporter and they cannot be selected in the status dropdown.

Important: You must be the Case Owner to make changes in this section. Upon changing the status for a mandated report, the mandated reporter will receive an email regarding the change in status and this change will also be reflected on the reporter view landing page.

- The **Activities** tab will display actions that have taken place on this **Case**.

- Click on the **Emails** tab. This section will display all email notifications that have been sent out from the portal for this case.
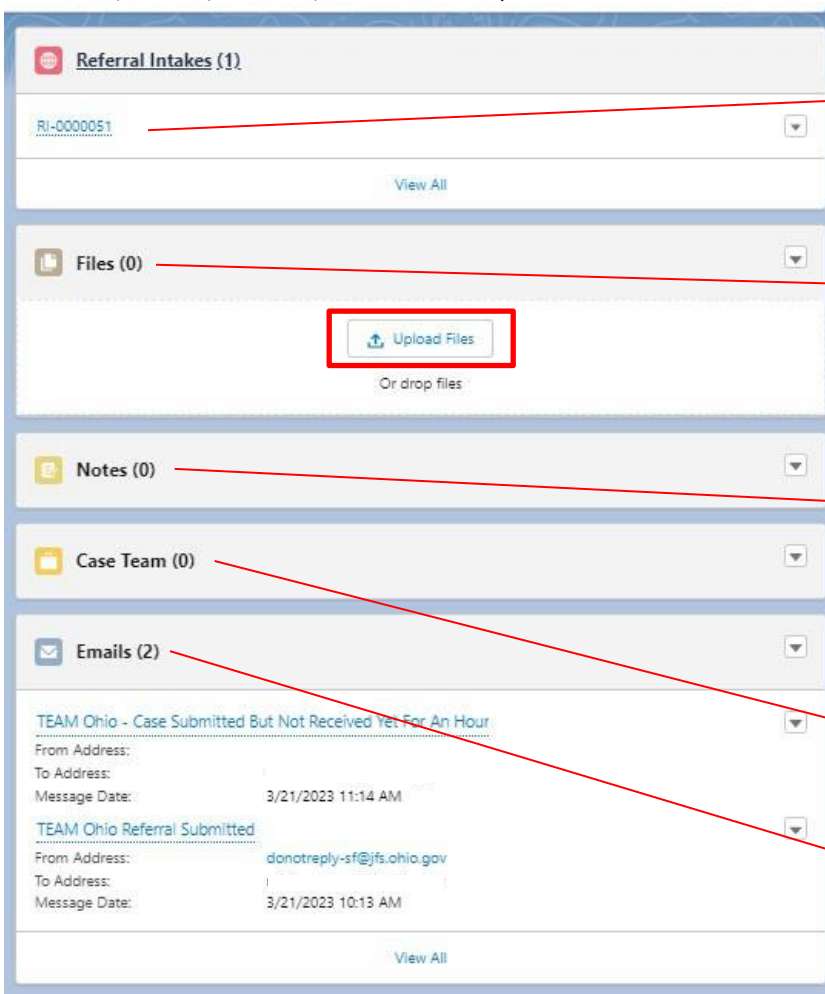
- On the right side of the **Case** screen, a vertical navigation bar will display **Referral Intakes**, **Files**, **Notes**, **Case Team,** and **Emails** section of the **Case**.

Referral Intakes will display the information submitted by the referent.

Files is a default field that will not be used by the PCSA. There is a separate files section within the referral tab that will house documents uploaded by the Mandated Reporter.

Notes can be added to any Case about actions taken. Click the down arrow to add New note. These are not shared with the Reporter.

Case Team This is a default field that will not be used by the PCSA.

Emails will document all correspondence that has been sent in reference to this Case.

Viewing the Referral Intake

1. Click on the hyperlink for the **Referral Intake**, which is a record number starting with the letters "**RI-** "

Ohio Department of Children & Youth
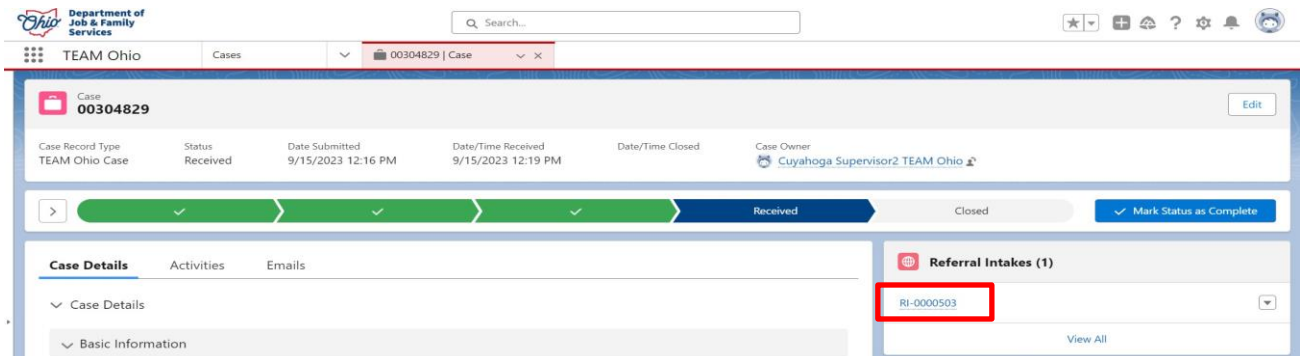
2. The **Referral Intake** screen appears. Review the submitted information for accuracy and completeness. You may scroll the entire screen to view the content, or for ease of reading, click **Referral PDF View**.

3. The **Referral Intake** record defaults to the **Details** tab, which can be expanded to view **Details** and **Additional Details**. Click on the arrows next to each label to expand or collapse the section to review.

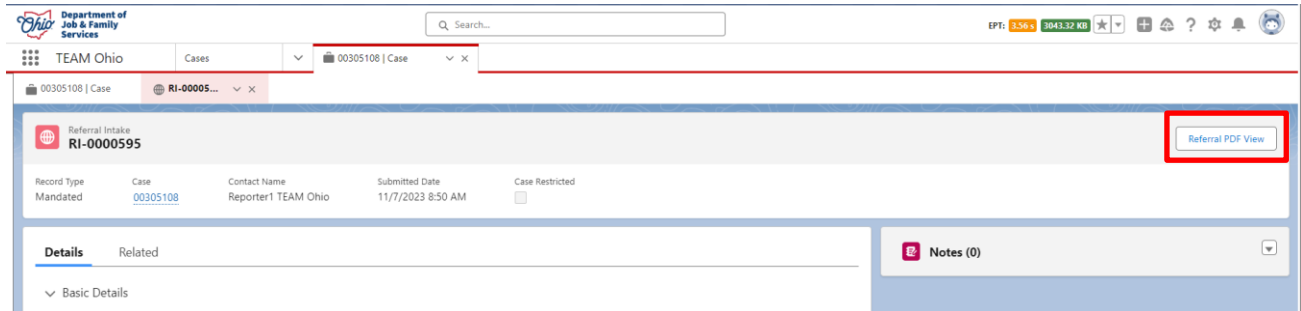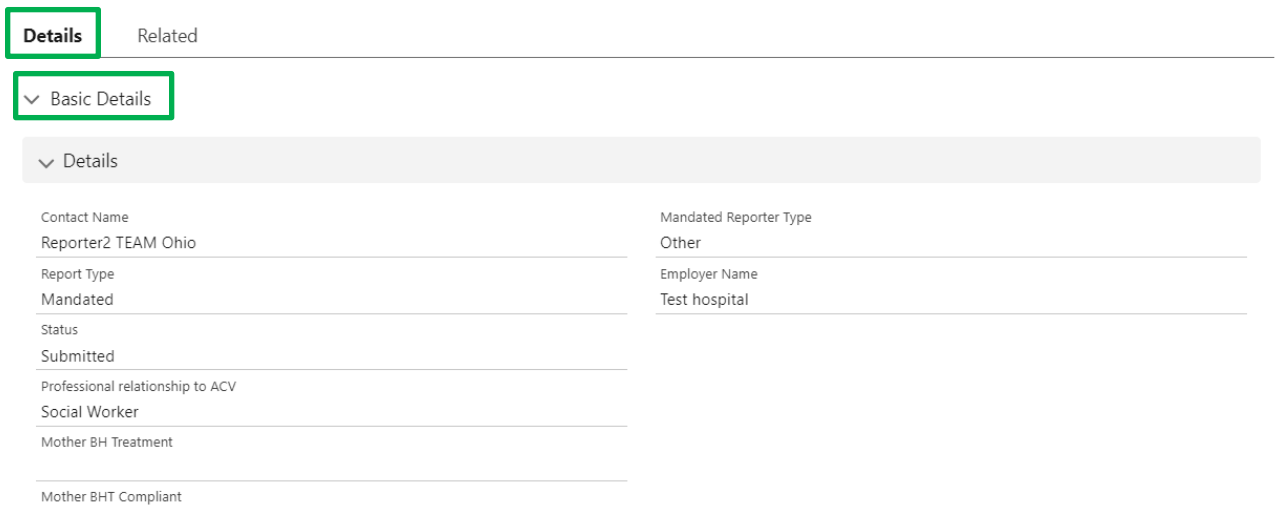4. The **Additional Details** will display all the narrative information provided about the suspected concerns, including:

- Contact and Employer Information for the Reporter
- General Information
- Physical & Emotional Abuse
- Neglect
- Sexual Abuse
- Dependency

- Substance Use
- Domestic Violence
- Other Concerns
- Details About Children

- Wrap Up Information
- System Information

Ohio **Department of Children & Youth**

Quick Tip: Hovering over the informational icon (ⓘ) seen throughout the screen will display the full question narrative that was presented to the mandated reporter.

Need To Be Seen By Medic/Mental Pro

∨ Neglect

> Does this report involve concerns about the child(ren)'s basic needs, living conditions, educational or medical needs?

Concerns Of Neglect ⓘ
Yes

Neglect - Basic Needs

Help Concerns Of Neglect

☐

Describe Failing To Provide Basic Needs

Neglect - Lack Of supervision

☑

Describe Concern For Lack Of Supervision
test

Neglect - Dirty/Unsanitary/Unsafe Home

☐

Describe Conditions Of The Home

Neglect - Child's Hygiene/Lice

5. Click on the **Related** tab to view any **Files** attached by the Mandated Reporter. Here you can also add **Notes**, view all **Referral Intake Contacts,** and **Participant Relationships**. You can click on the headers of any section to see more detailed and complete information.

Ohio Department of Children & Youth

a. **Files** stores information submitted by the Mandated Reporter.

Ohio **Department of Children & Youth**

b. **Notes** will allow you to record information about additional actions taken on this **Referral Intake**. Notes completed here will only save in the Referral Intake, not within the Case Notes section.

c. The **Referral Intake Contacts** will show each person who was added to the report, their **Participant Type** (this includes both Participants and Witnesses)**, Participant Role** in the intake and their **First, Middle and Last Name** Click on the hyperlinks under **Name** (records starting with '**RIC**') to see additional details about the individual. This section will also contain Plan of Safe Care information, if applicable.

Name	Type	Role	Name	
RIC0000000461	Participant	Child Subject of Report	Teen One	▼
RIC0000000462	Participant	Child Subject of Report	Infant One	▼
RIC0000000463	Participant	Alleged Perpetrator (AP)	Parent One	▼
RIC0000000464	Participant	Alleged Perpetrator (AP)	Unknown Unknown	▼
RIC0000000465	Witness		Witness One	▼

d. The **Participant Relationships** will display all participants and their relationship to all other participants listed in the referral. This section will provide a breakdown of each **individual pairing**. You can access the details of each individual pairing by clicking the hyperlinks under **Participant Relationships** (starting with '**PR**-').

Transfer Data to Ohio SACWIS

Until integration with Ohio SACWIS is achieved, the information gathered in TEAM Ohio from the Mandated Reporters will need to be copied and pasted into an Intake record created in Ohio SACWIS.
Mandated reporter letters will need to be processed in Ohio SACWIS and manually sent per rule and agency policy.

IMPORTANT:
- Due to the layout and amount of information held within the referral, we are recommending that PCSAs view the submitted information by clicking on the Referral PDF View button on the top right.
- By clicking this button, a PDF is generated that the screener can review, save, print, and copy directly out of and paste into Ohio SACWIS fields.

1. Log in to **Ohio SACWIS**

Ohio Department of Children & Youth

2. Click on the **Intake** tab

3. Click the **Add Intake** button

	Home	Intake	Case	Provider	Financial	Administration

Intake Workload

Agency:		Ohio Department of Job and Family Services	⌄
Add Intake	View by:	Default ⌄ Filter	

Showing 2 intakes (Default view):

Claimed By ⇕	Intake ID ⇕ Screening Priority	Workload Name ⇕	Category ⇕	Date/Time ⇕ Received	Screener Name ⇕ SDM Name	Status ⇕	Status Date/Time

4. **Important:** Remember to back date the Received Day/Time to correspond with when it was received in **TEAM Ohio**.

5. Copy and paste the **Referral Intake** concerns from **TEAM Ohio** into the **Intake Narrative.**

6. Complete the remaining Ohio SACWIS Intake tabs and screen in or out the newly created Intake to correspond with any screening decision dates/times which were made in **TEAM Ohio**.

7. Once the intake has been inputted into Ohio SACWIS, check the box for **SACWIS Entry completed** in the **Basic Information** in **Case Details**.

Note: For additional guidance on managing an **Intake** in Ohio SACWIS, please refer to the Ohio SACWIS Knowledge Base (jfskb.com) or CAPS LMS (tile found in MyOhio.gov apps).

Case Re-Assignments

1. Once a Screener accepts a **Case** for assignment, only the owning Screener or a Supervisor can re-assign it. To do so, the Screener/Supervisor will need to navigate to a **Case List** screen where the **Case** is visible, checkmark the **Case** that needs reassigned and click **Case Change Owner.**

⠿ TEAM Ohio	Cases	⌄

🗂 Cases All Open Cases ▾ 📌						New Printable View Case Change Owner

1 item selected

Q Search this list...

	☐	Case Number ↑ ⌄	Contact Name ⌄	Subject ⌄	Status ⌄	Priority ⌄	Date/Time Opened ⌄	Case Owner Alias ⌄	
1	☑	00303366	Reporter1 TEAM Ohio	TEAM Ohio Case	Screened In	Low	3/13/2023 1:44 PM	fsuptoh2	▾
2	☐	00303379	Reporter2 TEAM Ohio	TEAM Ohio Case	Screened In	Low	3/14/2023 2:06 PM	fsctoh2	▾
3	☐	00303384	Default Person Account1	TEAM Ohio Case	In Progress	Low	3/15/2023 9:48 AM	TEAM Ohio Franklin County Queue	▾
4	☐	00303386	Reporter2 TEAM Ohio	TEAM Ohio Case	Received	Low	3/15/2023 10:04 AM	fsuptoh2	▾
5	☐	00303416	Reporter2 TEAM Ohio	TEAM Ohio Case	Received	Low	3/20/2023 8:30 AM	fsuptoh2	▾
6	☐	00303433	Elizabeth	TEAM Ohio Case	Screened In	Low	3/21/2023 11:47 AM	fsuptoh2	▾

Ohio **Department of Children & Youth**

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2. The Screener/Supervisor will then **Search** for the employee they wish to re-assign to, **Select** their name from the list, and click **Save**. If the user decides to not re-assign, they can click **Cancel** to discard any changes.

   Note: Supervisors can reassign any case, regardless of ownership, to themselves, a screener, or another supervisor. Screeners are only able to reassign cases, that are assigned to them, to other screeners. They are not able to assign cases to supervisors.

Help

If access issues are encountered attempted to utilize TEAM Ohio, please contact SACWIS_ACCESS@childrenandyouth.ohio.gov.

If you encounter technical difficulties while using TEAM Ohio, please contact DCY Children Services Operational Support through the Customer Care Center and note that you have a TEAM Ohio Issue. Please provide screenshots if available.

Department of
Children & Youth

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