Closing a Case in Ohio SACWIS
General Information and Q&A

Knowledge Base Article

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Overview

This Knowledge Base Article describes how to close a Case, providing different scenarios as a guide.

Closing Functionality

Completion of a Reunification Assessment is required prior to reunification if the child has been out of the home for thirty days or more (5101:2-37-04).

1. End date the Legal Custody Episode under Legal Custody/Status or via Ruling.

2. Enter Discharge reason on the current placement for the child in Ohio SACWIS.

3. Within 7 days of a child changing placement or leaving care & placement, the worker is required to conduct a face-to-face exit interview with the child, unless the child is leaving a residential care facility or non-licensed provider (OAC 5101: 2-42-65.1).

4. Record the Exit Interview in Ohio SACWIS.

5. Complete a Case Review for Closure if one has not been completed within the last 30 days.

6. End date all paid Case Services for the child in Case Services.

7. Update the Family Case Plan for Case Closure. Process the Family Case Plan for approval.

8. End date the Independent Living Plan, if applicable.

9. Record Legal Guardianship record, if applicable.

10. Important: Ensure all work items are marked as Complete (no draft work items).

11. Ensure all Activity Logs are in "Completed" Status.

12. Enter an Activity Log for case closure.

13. Complete the Case Closure link from the left-hand navigation and validate for approval. If there are items that still need completed, Ohio SACWIS will inform the user what is required to be done before closure, i.e., race is required for all members, Previously I Adopted question has been answered in all person profiles.

14. Once all items are completed and the validation comes back with no outstanding work items, process the case closure for approval.

Closing an Adoption Case for "Other than Adoption Finalized"

When a child will not finalize in an adoptive home/placement (due to death, ages out of the system, or their legal status changes from PC to something else, like PPLA) then the Agency needs to:

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- Terminate the Agency Legal status of PC with the correct termination reason (other than **Adoption Finalization**).
- After the Legal Status has been terminated, navigate to the **Adoption/Placement Closure** screen.

Important: DO NOT SEAL the child's record. Sealing the case is what triggers the new person ID and other system activities.

- Close the adoption case in Ohio SACWIS.

Note:

- When the agency terminates the Agency Legal status, the system then overrides the business rules for sealing the adoption case.
- This process can only be done if this is the only child in the Adoption case. If there is more than one child in the adoption case and this circumstance doesn't apply to all the children, then the adoption case cannot be closed until all children are ready to have the adoption case closed.

Q&A

Question: Can I close a case within 30 days if a case plan has already been started? Or, will the case plan come up showing unresolved items?
Answer: The system will not allow a case to close if any of the following associated work items do not have an approval status:

- Safety Assessment
- Family Assessment
- Specialized Assessment Investigation
- Reunification Assessment
- Ongoing Case Assessment / Investigation
- Justification / Waiver
- Case Plan
- Case Review / SAR
- Family Service Plan
- Family Service Review

Closing a Case in Ohio SACWIS General Information and Q&A

Question: How do I close a case that was opened in error?

Answer: Once work items are saved in Ohio SACWIS, they cannot be removed or deleted. When a case is opened in error, the worker must close the case using the standard case closure process. Appropriate drop-down values should be selected (best choice available) and narrative entries made to indicate that the case was opened in error.

Question: Is there a workaround for cases that are assigned for on-going services and are planned for closure prior to 30th day? A case review is not waiverable when the case plan is not even due and the Family Assessment is 30-days current.

Answer: When an ongoing case is to be closed within 30 days, the case plan tickler should be manually disposed of, and the case should be closed using normal case closing procedures.

Question: Sometimes we have families where one child turns 18, goes home to a relative, etc., and is no longer part of the case. What is the proper Ohio SACWIS procedure for closing a child on a case? What is the correct way to "close" that child, so we no longer have to do visits, etc.?

Answer: Based on the child's exact level of involvement in a case, the process for closing them will vary.

- If the child is only a member of the case, they may be inactivated in the case.
- If the child is in custody, placement, or receiving services, these involvements must be end-dated before the child can be inactivated.
- If the child is included in a Case Plan, Visitation Plan, etc., the plans must be amended to remove the child or closed before inactivation.
- If the child has an Agency Legal Status, the Termination Date, Termination Reason, and Custody Episode Termination information must be entered.

Note: Entering the Termination Date, Termination Reason, and Custody Episode Termination for the appropriate legal status record will terminate the IV-E eligibility for that child.

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

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