

# Recording a Living Arrangement



**Knowledge Base Article**

# Recording a Living Arrangement

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# Recording a Living Arrangement

## Overview

This article explains how to document when a child is living outside of their home but remains in the custody of their parent/guardian. This is different from the Legal Guardianship record.

For more information on Legal Guardianship, please refer to the Knowledge Base Article “Recording a Legal Guardianship / Custody Record”.

### Important:

- Ohio SACWIS users are strongly encouraged to use **Recording a Living Arrangement** functionality so a youth’s location can be properly documented.
- To complete the process of recording case services (paid and unpaid) for the caretakers / caregivers of the **Living Arrangement**, you will need to **add case services for the caregivers / caretakers and/or case members**. For additional information on how to do this, please refer to the **Managing Case Services** Knowledge Base Article.
- At the end of this Knowledge Base Article, there is a **Generating Reports** section that discusses how to run related **Children in Living Arrangement** reports that can be attached to a Case Plan (if needed) or submitted to the court (if requested).

## Navigating to the Living Arrangement Information Screen

Complete the following steps to record a **Living Arrangement**:

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 **Living Arrangement** link in the **Navigation** menu.

# Recording a Living Arrangement

The screenshot shows a web application interface for case management. At the top, there is a navigation bar with tabs: Home, Intake, Case (selected), Provider, Financial, and Administration. Below this is a sub-navigation bar with 'Workload' (selected), Court Calendar, and Placement Requests. On the left is a sidebar menu with various options, including 'Case Overview' (selected), Activity Log, Attorney Communication, Intake List, Safety Assessment, Substance Abuse Screening, Forms/Notices, Category/Pathway Switch, Safety Plan, Actuarial Risk Assessment, Family Assessment, Ongoing Case A/I, Specialized A/I Tool, Law Enforcement, Justification/Waiver, Case Services, Legal Actions, Legal Custody/Status, Child Support Information, and 'Living Arrangement / Guardianship' (highlighted). The main content area displays case details for 'ICAMA' with ID '123456', address '123 Test Rd, Test, Oh 12345', and agency 'Test County Department of Job and Family Services'. Below the details are two error messages: 'One or more active case member(s) is missing demographic information: race, ethnicity, gender, DOB' and 'One or more active case members under age 22 is missing ICWA information in Person Demographics'.

The **Living Arrangement Records** screen appears.

5. In the **Child's Name** field, select the appropriate child. (Required)

**Note:** The **Child's Name** field displays all case members (active and inactive).

6. Click the **Add Living Arrangement** button.

# Recording a Living Arrangement

Case Overview  
Activity Log  
Attorney Communication  
Intake List  
Safety Assessment  
Substance Abuse Screening  
Forms/Notices  
Category/Pathway Switch  
Safety Plan  
Actuarial Risk Assessment  
Family Assessment  
Ongoing Case A/I  
Specialized A/I Tool  
Law Enforcement  
Justification/Waiver  
Case Services  
Legal Actions  
Legal Custody/Status  
Child Support Information  
**Living Arrangement / Guardianship**  
Initial Removal  
Placement Request  
Child Location/CCA  
Retrieve Ohio Benefits Data

CASE NAME / ID: **ICAMA**  
**Test, Case Name / 123456** Open (05/05/2016)

Living Arrangement | Legal Guardianship/Custody

Living Arrangement Filter Criteria

From Begin Date:  To Begin Date:

Child's Name:  Created in Error:  Exclude  Include

Sort Results By:   Current Case Episode  View Historical

Living Arrangement Records

Child / DOB	Who Holds Legal Responsibility	Caretaker Name	Begin Date/End Date	End Reason	Agency	Created in Error
No Result Found						

Child's Name:

The **Living Arrangement Information** screen appears displaying the selected child's name as read only.

## Completing the Living Arrangement Information Screen

1. In the **Begin Date** field, enter the appropriate date.

**Note:** The **Begin Date** field can be backdated, but not future dated. The system uses the begin date for validation purposes as explained later.

2. In the **Living Arrangement Type** field, select the appropriate type from the drop-down list. If needed, refer to the additional information below.

# Recording a Living Arrangement

Case > Workload > Living Arrangement

CASE NAME / ID: Test, Case Name / 123456

ICAMA / Open (05/05/2016)

**Living Arrangement Information**

Agency: Test County Department of Job and Family Services  
 Person ID: 123456  
 Child Name: \_\_\_\_\_ DOB: 05/07/2015

**Begin Date: \***

**Living Arrangement Type: \***

**Who Holds Legal Responsibility: \***

**Available Person(s):**

Test, Mother	; 02/06/1988
Test, Father	; 09/12/1983
Test, Grandfather	; 03/01/1979
Test, Grandmother	; 11/16/1951
Test, Sibling	; 07/15/2011

**Selected Person(s) Holding Legal Responsibility:**

## Important Information about the Living Arrangement Type Field

- As shown in the chart below, the **Living Arrangement Types** are either Person based, or Provider based:

Living Arrangement Type Chart	
Person Based	Provider Based
Kinship Care – Relative Home	Foster Care
Kinship Care – Non-Relative Home	Hospital/Nursing Home
Child of Minor Parent** ** See more bullets below about this.	Juvenile Detention Center
	Runaway Crisis Center
	Child’s Residential Center (CRC)
	Group Home
	Dept of Youth Services (DYS)
	Independent Living

- The selection made in the **Living Arrangement Type** field determines what information appears in the **Caretaker Information** section of the screen (i.e., Person based, or Provider based).
- If any of the three **Person Based** values are selected, the **Caretaker Information** grid displays a **Relationship to Child** field and a **Role** field for each Caretaker. After the **Add Caretaker** button is clicked, drop-down boxes appear for **Relationship to Child** and **Role** fields. These two fields are discussed in more detail below. (If **Provider Based** values are selected, these fields will not appear.)

## Recording a Living Arrangement

Caretaker Information

Caretaker	Primary Address	Relationship To Child	Role	
Test, Grandmother / 121212	111 Test Rd, Test OH 12345	Grandmother	<div style="border: 1px solid #ccc; padding: 2px;"> <input type="text" value="Grandmother"/> </div>	<a href="#">unlink</a>

Relationships

Test, Grandmother / 121212

Add Caretaker

Person Search

- Only one current Living Arrangement record can exist at a time per child. A child can have multiple Living Arrangements, but the dates cannot overlap. Nor can the dates overlap with a Custody Episode.
- If the selected Caretaker (any Role) is an Active provider member of an Active (status) Home provider, upon saving a Living Arrangement record, the following notification will be sent to all assigned workers, the provider, and their supervisors stating:

**<Person First Name and Last Name; Person ID> associated to <Provider ID(s)> has been identified as a Living Arrangement Caretaker for <Child First Name and Last Name; Person ID>. Please add this child as a member of this provider.**

## Recording a Living Arrangement

### Important Information When Selecting the Child of a Minor Parent

- When the **Child of Minor Parent** value is selected from the Person-based values, then only the value of **Mother Holds Custody, Father Holds Custody, Both Mother or Father Hold Custody**, can be selected in the **Who Holds Legal Responsibility** field (discussed below) and validated upon save.
- When the **Child of Minor Parent** value is selected and the **Caretaker** is in a placement setting as of the Living Arrangement begin date, the address displayed will be the provider's primary address associated with the current placement setting of the minor parent (as of the system date or as of the Living Arrangement end date, if ended).
- When the **Child of Minor Parent** value is selected, upon Save, the system validates that at least one Caretaker has been selected where the minor parent is in a placement setting as of a Living Arrangement begin date.
- For additional information on the Living Arrangement Type **Child of Minor Parent**, please refer to the **Generating Payments and Medicaid for the Child of a Minor Parent** Knowledge Base Article. [Generating Payment and Medicaid for the Child of a Minor Parent.pdf](#)

### Continuing with the Process in Ohio SACWIS

1. In the **Who Holds Legal Responsibility** field, select the appropriate value.
2. In the "Available Person(s) select box" (to the left of the **Add** and **Remove** buttons), click the appropriate **Name(s)**.

**Note:** The "Available Person(s)" select box lists the names of all Active and Inactive case members.

3. Click the **Add >** button. The selection moves the selected Person(s) to the Selected Person(s) Holding Legal Responsibility box on the right.
4. If an incorrect person was selected and added, click the name to highlight it from the Selected Person(s) box and click the **< Remove** button. The name moves back to the Available Person(s) box on the left.

# Recording a Living Arrangement

**Living Arrangement Information**

Agency: Test County Department of Job and Family Services  
Person ID: 123456  
Child Name: Test, Child      DOB: 05/07/2015  
Begin Date: \* 05/26/2025   
Living Arrangement Type: \* Child of Minor Parent  
Who Holds Legal Responsibility: \* Mother

Available Person(s):	Selected Person(s) Holding Legal Responsibility:
<input type="text" value=""/> <input type="button" value="Add"/>	<input type="button" value="Remove"/> <input type="text" value=""/>
Test, Mother ; 02/06/1988	Test, Grandfather ; 11/16/1951
Test, Father ; 09/12/1983	Test, Grandmother ; 03/01/1979
Test, Sibling ; 07/15/2011	

## Important:

- You can only select one name, unless the value chosen in the **Who Holds Legal Responsibility** field is **Both Mother and Father**. In those cases, the system requires that two names be selected from the Available Person(s) select box” field.
- If the desired name does not display in the Available Person(s) select box” field, navigate to the **Members** tab and verify that the person is a case member.

## Completing the Caretaker Information Section

Follow the steps below to complete the **Caretaker Information** section of the **Living Arrangement Information** screen.

1. If you selected a Person-based value in the **Living Arrangement Type** field, select the appropriate **Caretaker** name from the drop-down list.
  - OR if you had selected a Provider-based value in the **Living Arrangement Type** field, please skip to **Step 6** below.
2. Click the **Add Caretaker** button. The selected person’s name and address appear in the **Caretaker Information** grid.

## Recording a Living Arrangement

Living Arrangement Type: \* Child of Minor Parent

Who Holds Legal Responsibility: \* Mother

Available Person(s):

Person	Date of Birth
Test, Mother	02/06/1988
Test, Father	09/12/1983
Test, Sibling	07/15/2011

Selected Person(s) Holding Legal Responsibility:

Person	Date of Birth
Test, Grandfather	11/16/1951
Test, Grandmother	03/01/1979

**Caretaker Information**

Caretaker	Primary Address	Relationship To Child	Role
<input type="text"/>			

[Add Caretaker](#) [Person Search](#)

- If the person's name does not display in the drop-down list, perform one of the following actions:
  - Click the **Person Search** button (shown above) to locate the person. Once selected, the person's name and address appear in the **Caretaker Information** grid.
  - Navigate to the **Members** tab and add the person as a case member or associated case member. Then select the person's name from the drop-down list.

The **Caretaker Information** grid populates. The **Relationship to Child** field and **Role** field also appear in the grid row.

**Caretaker Information**

Caretaker	Primary Address	Relationship To Child	Role
Test, Grandmother / 121212	111 Test Rd, Test OH 12345	Grandmother	<input type="text"/> <ul style="list-style-type: none"> <li>Caretaker</li> <li>Other Involved Adult</li> <li>Other Involved Child</li> </ul>

[Add Caretaker](#) [Person Search](#)

### Note:

- The drop-down list contains the names of all active and inactive case members, as well as the associated case members.
- There is no limit to how many people can be added to the **Caretaker Information** section, but at least one person must have the **Role** of **Caretaker**.
- Additional people in the household can be added to the **Caretaker Information** grid at your agency's discretion.

## Recording a Living Arrangement

- As mentioned previously, if you select any of the three **Person Based** values shown in the **Living Arrangement Type Chart**, the **Caretaker Information** grid appears (once the caretaker's name is selected) displaying a **Relationship to Child** field and a **Role** field. If a **Provider Based** value is selected, neither of these fields appear in the grid.

For each Person-based Caretaker listed in the **Caretaker Information** section:

- Click the relationships button (Required)
- In the **Role** field, select the appropriate role for each Caretaker added.

**Important:** At least one value in the **Role** column must be **Caretaker** to save the record.

- If you selected a Provider-based **Living Arrangement Type**, click the **Provider Search** button to search for the Provider. Once selected, the provider's name and address appear in the **Caretaker Information** grid.

Following is an example of a Provider-based **Caretaker Information** section where no **Relationship to Child** field or **Role** field appears:

Caretaker Information	
Caretaker	Primary Address
<input type="button" value="Provider Search"/>	

**Note:** When a Provider-based living arrangement is selected, at least one provider must be chosen to save the record.

- In the **Comments** field, enter any relevant comments. (Optional)
- Prior to saving the record**, if an incorrect provider or person was added, click the **Unlink** hyperlink in the appropriate grid row to remove that provider or person.
- If you removed an incorrect provider or person, repeat the steps above to add the correct provider or person.
- If the record was completed in error, checkmark the Created In Error box.

**Note:** After clicking the Save button, the Living Arrangement record is no longer editable and cannot be modified, except for the Comments field, End Date field, End Reason field, and Created in Error check box, which are discussed later in this document. Once end-dated, the Comments field is no longer editable.

# Recording a Living Arrangement

**Caretaker Information**

Caretaker	Primary Address	Relationship To Child	Role	
Test, Grandmother / 121212	111 Test Rd, Test OH 12345	Grandmother	Caretaker	<a href="#">unlink</a>

**Relationships**

Test, Grandmother / 121212

[Add Caretaker](#) [Person Search](#)

**Comments:**

Testing narrative, grandmother.

[Spell Check](#) [Clear](#) 3969

**Created In Error**

Created By: Created Date:  
Modified By: Modified Date:

## Completing the Medicaid Matching Section

**Note:** The Medicaid Match section will only display if **Child of a Minor Parent** is selected as the **Living Arrangement Type**.

There are three methods the system will use to locate a potential match:

- **Multiple Matches**
- **Exact Match**
- **No Match**

**Note:** The system will display only one of the match methods listed above to the User.

### Exact/Potential Match:

1. To view Ohio SACWIS Case Members, click **Ohio SACWIS Case Members** to expand the page.
2. Select the **Radio button** for the most appropriate Medicaid Match for the youth.

**Note:** The system defaults to the Not Answered Radio button. The User will not be able to save the Living Arrangement record with this option selected.

# Recording a Living Arrangement

## Ohio Benefits (OB) Person Matching for Medicaid

Select the most appropriate match for the youth in custody

Youth Name: *Test, Child* OB Case Address: 123 Test Rd, Test OH 12345 SSN: No Match

Match Type: Ohio Benefits was able to match to a youth by Name, Gender, and DOB, review the potential match carefully to ensure it is a correct match. DOB: 06/22/2019 Gender: Female Race: White

[Ohio Benefits Case Members](#) ▾

None of the above records are a match for the Ohio SACWIS Youth.

Not Answered

## Multiple Matches:

## Ohio Benefits (OB) Person Matching for Medicaid

Select the most appropriate match for the youth in custody

Youth Name: *Test, Child* OB Case Address: 123 W SPRING ST, LIMA, OH 45801 SSN: No Match

Match Type: Ohio Benefits found multiple potential matching persons for the request, select the appropriate match, or select None of the person match. DOB: 04/04/2013 Gender: Male Race: White

[Ohio Benefits Case Members](#) ^

Case Member Names	DOB / Age	Gender	Relationship to child
Test, Mom	09/01/1976; 48	Female	Mom
Test, Dad	03/22/1969; 56	Male	Dad
Test, Aunt/Uncle	12/06/1971; 53	Female	Aunt/Uncle (up to 3 greats)

Youth Name: *Test, Child* OB Case Address: 2434 WALES AVE, LIMA, OH 45805 SSN: No Match

Match Type: Ohio Benefits found multiple potential matching persons for the request, select the appropriate match, or select None of the person match. DOB: 04/04/2013 Gender: Male Race: White

[Ohio Benefits Case Members](#) ^

*Test, Child*

Case Member Names	DOB / Age	Gender	Relationship to child
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None of the above records are a match for the Ohio SACWIS Youth.

Not Answered

# Recording a Living Arrangement

## No Match:

Once the Living Arrangement has been saved, Ohio Benefits will process the Medicaid application for this youth without a previous Ohio Benefits case associated to this youth.

### Ohio Benefits (OB) Person Matching for Medicaid

*Ohio Benefits did not find any person who is a possible match to the youth in custody. Upon completion of the Initial removal record, OB will process the Medicaid application but there will not be a previous OB case associated to this youth.*

3. Select the most appropriate option from the results returned for the Youth. If no possible results are returned, the User will not need to make a selection.

## Completing the Medicaid Details Section

1. Make a selection for **Managed Care Organization (MCO) Plan Selection**, if applicable.

### Medicaid Details

This person has already been matched with the Ohio Benefits person (1234567).

#### Managed Care Organization (MCO) Plan Selection:

AmeriHealth Caritas

*The above plan has been pre-determined by your agency.*

**Note:** The MCO Selection dropdown will default in several scenarios based on predetermined information recorded in your Agency:

- **Drop down is Non-Modifiable:** Your Agency has Pre-Selected to use the ODM Enrollment Broker to select the youth's MCO plan.
- **An MCO has been Pre-Determined by your Agency.** This is still modifiable by the User as needed.
- **An MCO appears in the drop down:** System is displaying the Youth's last known MCO plan. This is still modifiable by the user.
- **No Default:** The User will need to select a MCO Plan.

2. Click the **Save** button.

Apply **Save** Cancel

The **Living Arrangement History** screen appears.

**Important:** After clicking the **Save** button, the Living Arrangement record is no longer editable and cannot be modified, except for the **Comments** field, **End Date** field, **End Reason** field, and **Created in Error** check box, which are discussed later in this document. Once end-dated, the **Comments** field is no longer editable.

## Recording a Living Arrangement

If you enter a new record, you can use the **Copy** link (discussed below) or follow the steps previously discussed to select the child's name in the **Child Name** field (**Living Arrangement Records** screen).

### Living Arrangement Error Messages

When data on the **Living Arrangement Information** screen is saved, Ohio SACWIS validates that the information is accurate and (if needed) provides instructions on what must be corrected to save the record.

The following are Ohio SACWIS error messages that could appear:

**A) The Child has a current Living Arrangement. You must end date the current Living Arrangement before adding a subsequent Living Arrangement record.**

This message appears when a current Living Arrangement Record exists for a child, and you attempt to create a new Living Arrangement Record where the new Living Arrangement record's begin date starts after the begin date of the current Living Arrangement record.

**B) The Living Arrangement begin date or end date cannot overlap a custody episode record.**

This message appears when a Living Arrangement record time period overlaps a custody episode record for the child.

**C) The Living Arrangement begin date or end date cannot overlap a placement record.**

This message appears when the child has a current open Placement Record, so you cannot create a Living Arrangement.

**D) The Living Arrangement begin date or end date cannot overlap an initial removal record.**

This message appears when the child has a current open Initial Removal Record, so you cannot create a Living Arrangement.

**E) The Living Arrangement begin date or end date cannot overlap a Child Legal Status record.**

This message appears when the child has a current open Child Legal Status Record, so you cannot create a Living Arrangement.

**F) The child must be an active case member as of the Living Arrangement begin date.**

This message appears to show that the child was an active case member at the time of the begin date, so you cannot create a Living Arrangement.

**G) The selected members in the Who Holds Legal Responsibility must be an active case member(s) as of the Living Arrangement begin date.**

## Recording a Living Arrangement

This message appears to show that the selected members in the **Who Holds Legal Responsibility** field were active case members at the time of the begin date, so you cannot create a Living Arrangement.

### H) The Living Arrangement begin date or end date cannot overlap a custody episode record.

This message appears to show that the child has an active custody record at the time of the begin date, so you cannot create a Living Arrangement.

### I) When the "Who holds Legal Responsibility" is selected as 'Both Mother and Father', two case members must be selected.

### J) Relationship to Child' must be selected for all the selected Caretaker(s).

## End Dating a Record

If any Living Arrangement information has changed after a record was saved, you will need to do one of the following:

- Enter the **End Date**, as well as an **End Reason**.  
OR
- Click the **Created in Error** check box to create a new Living Arrangement record.

## Important Information When End Dating a Living Arrangement

- A Living Arrangement should be end dated when it is no longer valid.
- If the child is only active in one case, then a Living Arrangement must be Closed in order to Close the case.
- A Living Arrangement record can only be marked as **Created in Error** if that Living Arrangement falls within the most recent case episode.
- After end dating the Living Arrangement, the **End Date** field and **End Reason** field are no longer editable. However, the **Created in Error** field and the **Comments** field remain enabled.
- After a Living Arrangement record is marked as **Created in Error**, the record becomes no longer editable.
- If an end date is entered, an end reason is required. Likewise, if an end reason is entered, the end date is required.
- If the end date is removed, the system will remove the end reason.
- The end reason of **Provider Closed** or **Moved from Treatment Setting** cannot be selected when the Caretaker is Person-based.

# Recording a Living Arrangement

- If the end reason is **Case Closure**, the **Narrative** field is required.

## End-Dating a Living Arrangement

1. Navigate to the **Living Arrangement Records** screen using the steps previously discussed.
2. Click the **Edit** link in the appropriate row.

The screenshot shows the 'Living Arrangement' section of a software interface. At the top, a green notification bar states 'Your data has been saved.' Below this, the case name is 'Test, Case Name / 123456' and the status is 'Assess/Invest Open (04/02/2025)' with a 'HAZARD' tag. The main area is divided into 'Living Arrangement' and 'Legal Guardianship/Custody' tabs. Under 'Living Arrangement', there are filter criteria for 'From Begin Date', 'To Begin Date', 'Child's Name', 'Created in Error' (with radio buttons for Exclude and Include), and 'Sort Results By' (Begin Date, Current Case Episode, View Historical). Below the filters are 'Filter' and 'Clear Form' buttons. A table titled 'Living Arrangement Records' shows one record for 'Test\_Child' with an 'edit' link. The table columns are: Child / DOB, Who Holds Legal Responsibility, Caretaker Name, Begin Date/End Date, End Reason, Agency, and Created in Error.

The **Living Arrangement Information** screen appears.

3. In the **End Date** field, enter the appropriate date.
4. In the **End Reason** field, select the reason that the Living Arrangement is being ended from the drop-down list.
5. Click the **Save** button.

The screenshot shows the 'Living Arrangement Information' form. It has two main input fields: 'End Date' with a calendar icon and 'End Reason' with a dropdown arrow. Below these is a checkbox for 'Created In Error'. At the bottom, there are fields for 'Created By', 'Created Date', 'Modified By', and 'Modified Date', with the date 'May 28, 2025 11:04:50 AM' displayed for both.

Apply **Save** Cancel

## Recording a Living Arrangement

The **Living Arrangement Records** screen appears.

After saving the record, you can do one of the following:

- Enter a new Living Arrangement record using the **Copy** link as discussed below.
- Select the child's name and click the **Add Living Arrangement** button on the **Living Arrangement Information** screen (also called the **Living Arrangement History** screen) as previously discussed.
- Or, if no new living arrangement information exists, do not add a living arrangement.

### Copying a Living Arrangement Record

A **Copy** link is available for all Living Arrangements, including those marked as **Created in Error**.

**Note:** When copying a Living Arrangement, all fields (except the **Child Name** and **Agency**) of the Living Arrangement are copied in Edit mode. The Agency will be pre-populated with the logged-in user's associated Agency.

1. Navigate to the **Living Arrangement Records** screen using the steps above.
2. Click the **Copy** link in the appropriate row.

The screenshot displays the 'Living Arrangement Records' interface. On the left, a navigation sidebar lists various categories, with 'Living Arrangement / Guardianship' selected. The main area features a filter section with date pickers, a dropdown for 'Child's Name', and radio buttons for 'Created in Error' (Exclude/Include). Below the filters is a table with the following data:

	Child / DOB	Who Holds Legal Responsibility	Caretaker Name	Begin Date/End Date	End Reason	Agency	Created in Error
<a href="#">edit</a>	Test_Child 01/19/2025	Test, Mother	Test, Grandmother	04/02/2025		Test County Children Services	

The **Living Arrangement Information** screen appears displaying the copied information from the selected record.

If the **Living Arrangement Type** is going to change (be modified), you can **Unlink** the Caretaker information.

3. To unlink the Caretaker, click the **Unlink** hyperlink in the appropriate row.

# Recording a Living Arrangement

**Living Arrangement Information**

Agency: Test County Department of Job and Family Services  
Person ID: 123456  
Child Name: Test, Child      DOB: 05/07/2015  
Begin Date: \* 05/26/2025   
Living Arrangement Type: \* Child of Minor Parent  
Who Holds Legal Responsibility: \* Relative

Available Person(s):

Search	Add
Test, Mother ; 02/06/1988	
Test, Father ; 09/12/1983	
Test, Sibling ; 07/15/2011	

Selected Person(s) Holding Legal Responsibility:

Remove	Search
Test, Grandfather ; 11/16/1951	
Test, Grandmother ; 03/01/1979	

**Caretaker Information**

Caretaker	Primary Address	Relationship To Child	Role	
Test, Grandmother / 121212	111 Test Rd, Test OH 12345	Grandmother	Caretaker	<a href="#">unlink</a>

Relationships

Test, Grandmother / 121212

[Add Caretaker](#) [Person Search](#)

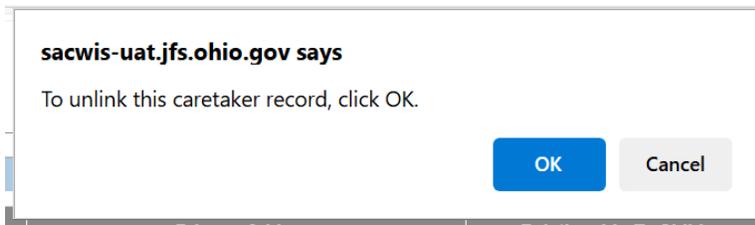
Comments:

Testing narrative, grandmother.

[Spell Check](#) [Clear](#) 3969

A message appears asking if you want to unlink the Caretaker record.

4. Click the **OK** button.



The Caretaker information is removed.

5. Complete the fields as discussed in the steps above.
6. When complete, click the **Save** button.

# Recording a Living Arrangement

## Inserting a Living Arrangement Record between Existing Dates

For historical tracking purposes, you can enter a Living Arrangement record that falls between two other already existing Living Arrangement records, including custody episodes. To do so, complete the following steps.

**Note:** Living Arrangements can only be inserted if the dates do not overlap with an already recorded Living Arrangement.

1. Navigate to the **Living Arrangement Records** screen using the steps previously discussed.
2. Click the **Edit** link or **Copy** link in the appropriate row.

The **Living Arrangement Information** screen appears.

3. In the **End Date** field, enter the date for the time frame in which you are trying to record (insert) the historical living arrangement.

## Recording a Living Arrangement

### Example:

**Existing Living Arrangement / Custody Episode Record #1:** Jan. 1<sup>st</sup> to Jan. 15<sup>th</sup>

**Existing Living Arrangement / Custody Episode Record #2:** Feb. 1<sup>st</sup> to Feb. 15<sup>th</sup>

**New Living Arrangement Record (to be added):** Jan. 15<sup>th</sup> to Jan. 31<sup>st</sup>

In this example, you would Edit or Copy record #1. Record the entire Living Arrangement information as discussed above, including the End Date and End Reason, and then save the record. If the End Date and End Reason are not entered, upon Save you will receive one of the Error Messages previously discussed.

4. In the **End Reason** field, select the reason the Living Arrangement is being ended from the drop-down list.
5. Click the **Save** button.

End Date:

End Reason:

Created In Error

Created By: Created Date: May 28, 2025 11:04:50 AM

Modified By: Modified Date: May 28, 2025 11:04:50 AM

The record is saved.

## Viewing and Editing Historical Records (Child Legal Statuses)

To view all historical records as well as end date any open records, click on **Legal Custody/Status** link.

1. To view historical **Child Legal Status** records, navigate to the **Legal Custody/Status** link in the menu using the steps previously discussed.
2. Click the **Legal Custody/Status** link.
3. To update the record (end date or mark as **Created in Error**), click the **Edit** link in the appropriate row.

# Recording a Living Arrangement

Home
Case
Provider
Financial
Administration

Workload
Court Calendar
Placement Requests

Case Overview

Activity Log

Attorney Communication

Intake List

Safety Assessment

Substance Abuse Screening

Forms/Notices

Category/Pathway Switch

Safety Plan

Actuarial Risk Assessment

Family Assessment

Ongoing Case A/I

Specialized A/I Tool

Law Enforcement

Justification/Waiver

Case Services

Legal Actions

▶ Legal Custody/Status

Living Arrangement / Guardianship

Initial Removal

CASE NAME / ID: **Assess/Invest**

**Brown, Alliliiyanna** / 62197441 Open (04/02/2025)

HAZARD

Legal Custody & Status Filter Criteria

All Persons

Persons with a Current or Historical Legal Status

Persons Under Age 22

Filter

Legal Custody & Status Information

Result(s) 1 to 4 of 4 / Page 1 of 1

	Case Participant	DOB	Custody Start Date - End Date	Legal Status	Legal Status Effective Date - Termination Date	Agency
<span style="border: 1px solid #d9534f; padding: 1px;">edit</span>	<a href="#">Test Child / 123456</a>	01/19/2025	04/02/2025 - 04/03/2025	Officer Acceptance	04/02/2025 - 04/03/2025	Test County Children Services

The Child's **Legal Custody Episode & Status Information** screen appears.

4. Click View or Edit to update the fields, as needed. The Child's **Legal Status Details** screen appears.
5. When complete, click the **Save** or **Cancel** button.

# Recording a Living Arrangement

## Legal Status Details

Agency:

Test County Children Services

Custody Episode Start Date:

Custody Episode End Date:

Most Recent Legal Guardianship:

No Legal Guardianship / Custody records Exist

**i** The custody episode start date and end date will be based on legal status effective date and termination date.

<b>Legal Status: *</b> <input type="text"/>	<b>Effective Date: *</b> <input type="text"/>	<b>Effective Time:</b> <input type="text"/> <input type="text"/> <small>HH:MM AM / PM</small>
<b>Termination Reason:</b> <input type="text"/>	<b>Termination Date:</b> <input type="text"/>	<b>Expiration Date:</b> <input type="text"/>
<b>Secondary Termination Reason:</b> <input type="text"/>		

**Narrative**

Created Date:

Created By:

Modified Date:

Modified By:

Save

Cancel

## Security Business Rules in Ohio SACWIS

### For Living Arrangement:

- Both court workers and placement workers can update records that were created by their logged in agency.
- Court workers and placement workers of the case-owning agency can create Living Arrangement records, along with all assigned workers to the case who have a Role of Court Worker or Placement Worker.
- All workers will be able to view the **Living Arrangement** screens.

# Recording a Living Arrangement

## For Child Legal Status:

- Both court workers and placement workers can update records across agency ownership.
- All workers will be able to view the child's **Legal Custody Status** screens.

## Generating Reports

The **Section 10: Living Arrangement History** of the **Person Overview Report** is a child-specific report generated from the **Forms/Notices** link in the **Navigation** menu in Ohio SACWIS. The report can be printed separately and submitted as an addendum to the **JFS 01444 Case Plan** when the court wants to view the child's living arrangement.

To submit agency-wide living arrangement information, a **Children in Living Arrangement** report can also be generated for the court.

These reports are discussed in the sub-sections below.

## Generating Section 10 of the Person Overview Report

To run **Section 10** of the **Person Overview Report** which includes the living arrangement history, 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 **Forms / Notices** link in the **Navigation** menu.

# Recording a Living Arrangement

The **Maintain Forms/Notices** screen appears.

5. In the **Forms/Notices** field, select **Person Overview**.
6. Click the **Select** button.

The screenshot shows the 'Maintain Forms/Notices' interface. At the top, there are navigation tabs: Home, Case (selected), Provider, Financial, and Administration. Below these are sub-tabs: Workload, Court Calendar, and Placement Requests. On the left, a sidebar menu lists various options, with 'Forms/Notices' highlighted. The main content area displays 'CASE NAME / ID: Test, Case Name / 123456', 'Assess/Invest Open (04/02/2025)', and a 'HAZARD' status. A 'Maintain Forms/Notices' section contains a dropdown menu for 'Forms/Notices' and a 'Select' button.

The **Document Details** screen appears.

The screenshot shows the 'Document Details' interface. At the top, there is a breadcrumb trail: Case>Workload>Reports. The 'Document Details' section shows 'Document Category: Person Overview', 'Work-Item ID: 10', and 'Task ID: 10'. The 'Document History' table is empty. A 'Generate Report' button is highlighted.

7. Click the **Generate Report** button.

The **Person Overview** screen appears.

8. In the **Person** field, select the appropriate name.
9. Click **Section 10: Living Arrangement / Guardianship History** check box.
10. Click the **Generate Report** button.

# Recording a Living Arrangement

**Person Overview**

Person:

Print All Sections

**Print Sections (at least one must be selected) \***

- Section 1: Profile
- Section 2: Education
- Section 3: Medical
- Section 4: Employment/Assets
- Section 5: Military
- Section 6: Legal
- Section 7: Delinquency/Violent Offender
- Section 8: Intake/Case History
- Section 9: Placement/Leave History
- Section 10: Living Arrangement/Guardianship History**
- Section 11: Child of Interest History
- Section 12: Worker History

The **Section 10: Living Arrangement History** report appears.

11. To save the report, click the **Save** button.

Ohio Department of Children and Youth  
**Person Overview**

Requestor: [Redacted] Agency: County Children Services Date: 05/28/2025 Time: 12:04:15 PM

Person ID: [Redacted]  
Current Status: Active Status Date: 01/21/2025

DOB: 01/19/2025 Age: 0 Gender: Male SSN: No data found  
Primary Address: [Redacted] Primary Phone: [Redacted]

**SECTION 10: LIVING ARRANGEMENT**

**LIVING ARRANGEMENT HISTORY:**

Begin Date: 04/02/2025	Living Arrangement Type: Kinship Care - Relative Home
End Date: [Redacted]	End Reason: [Redacted]
Who Holds Legal Responsibility: Mother	
Caretaker Information: [Redacted]	

**GUARDIANSHIP HISTORY:**

# Recording a Living Arrangement

## Generating the Children in a Living Arrangement Report

The **Children in a Living Arrangement** report provides agency-wide information. To run the report, complete the following steps:

1. From the Ohio SACWIS **Home** screen, click the **Administration** tab.
2. Click the **Reports** tab.

The **Reports** screen appears.

Report Filter Criteria

Report Category:  Report Type:

Filter

Title	Category	Type
<a href="#">AA Ceiling Waiver Requests Report *</a>	Fiscal	Agency
<a href="#">AAC Outreach Letter</a>	Fiscal	State
<a href="#">AAC Outreach Report</a>	Fiscal	State

3. The report is listed in alphabetical order and currently listed on Page 4 of the Reports list. Click the link on **Page 4**.
4. Click on the **Living Arrangement Report** link.

<a href="#">KSP State Provider Repayment Plan Report</a>	Fiscal	State
<a href="#">Living Arrangement Report</a>	Case	Agency
<a href="#">MEPA Child Report</a>	Administration	Agency
<a href="#">MEPA Provider Report</a>	Provider	Agency
<a href="#">Maintain Licensing Activities</a>	Provider	Unit
<a href="#">Matching Conference &amp; Adoption Activities Due</a>	Case	Agency
<a href="#">Medicaid Error Report *</a>	Fiscal	Agency

« < 1 2 3 4 5 6 7 8 > »

The **Report Details** screen appears.

5. In the **Select Report Output Format** section, select the **PDF** or **Excel** radio button to specify the report format. **Excel** is pre-selected.
6. Click the **Generate Report** button.

# Recording a Living Arrangement

Report Details			
Report Category:	CASE	Report Title:	Living Arrangement Report
Report Type:	AGENCY		
Report History			
ID	Date Created	Employee ID	Name
Document History			
Select Report Output Format			
<input type="radio"/> PDF			
<input checked="" type="radio"/> Excel			
<input type="button" value="Generate Report"/>			

The **Living Arrangement Report** screen appears.

- The **Agency** field is pre-selected. If needed, select the appropriate agency. (Required)
- Type of Totals to Display is also Required. Options are “Total Children in living arrangement during period” OR “Total Children who entered a living arrangement during period”.
- In the **Begin Date** field, enter the appropriate date. (Required)
- Click the **Generate Report** button.

Living Arrangement Report	
Agency: *	<input type="text" value="County Children Services"/>
Type of Totals To Display: *	<input type="text" value="Total children in living arrangement during period"/>
Begin Date: *	<input type="text"/>
End Date:	<input type="text"/>
<input type="button" value="Generate Report"/>	<input type="button" value="Cancel"/>

The **Children in a Living Arrangement Report** appears as shown in the example below.

- To save the report, click the **Save** button.

# Recording a Living Arrangement

Children in a Living Arrangement Report							
Agency: County Division of Children and Family Services							
From: 10/01/2020							
To: 10/26/2022							
Run Date: 10/26/2022							
Case ID	Case Name	Person ID	Person Name	DOB	Child's Current Age	Gender	Race
					17	Female	White
					15	Female	Black/Africa
					1	Female	White
					1	Female	White
					8	Male	Black/Africa
					12	Female	White
					1	Male	White
					6	Male	Black/Africa
					2	Male	Black/Africa
					17	Male	Black/Africa
					17	Male	Black/Africa
					9	Female	Black/Africa
					4	Female	Black/Africa
					4	Female	Black/Africa
					14	Female	White
					3	Male	Black/Africa
					3	Male	Black/Africa
					7	Female	White
					7	Female	Black/Africa
					7	Female	Black/Africa
					2	Female	Black/Africa
					4	Female	Black/Africa
					12	Female	Black/Africa
					8	Female	Black/Africa
					4	Male	White
					11	Female	White
					6	Male	White
					12	Male	White
					11	Male	White
					3	Male	Black/Africa
					44	Male	White
					8	Female	White
					11	Male	Black/Africa
					11	Male	Black/Africa

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