

Knowledge Base Article

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Overview

This Knowledge Base Article provides guidelines on how to group, move and copy legal actions within the Ohio SACWIS Court module.

Legal actions are now child-based in Ohio SACWIS. A legal action group is a user defined set of legal actions usually derived from the legal action that began the series of court involvement.

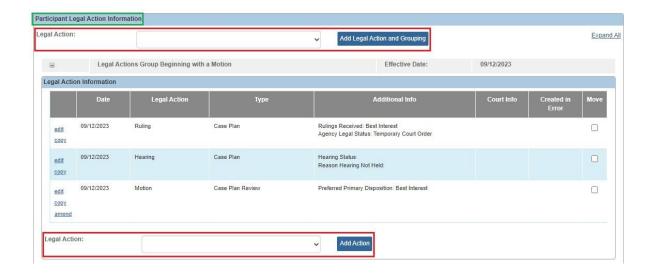
Note: For related information, refer to the following Knowledge Base Articles:

- Entering Hearings or Rulings
- **Entering Complaints and Motions**

Important Information about Using Grouping Functionality

All legal actions can now be grouped with other legal actions OR grouped independently. As discussed in more detail below:

- To group a legal action **independently**, you will select from the **Legal Action** field near the top of the screen and then click the Add Legal Action and **Grouping** button.
- To group a legal action with **existing** legal actions, you will select from the Legal Action field at the bottom of the existing legal group that you want to include it with and then click the Add Action button.



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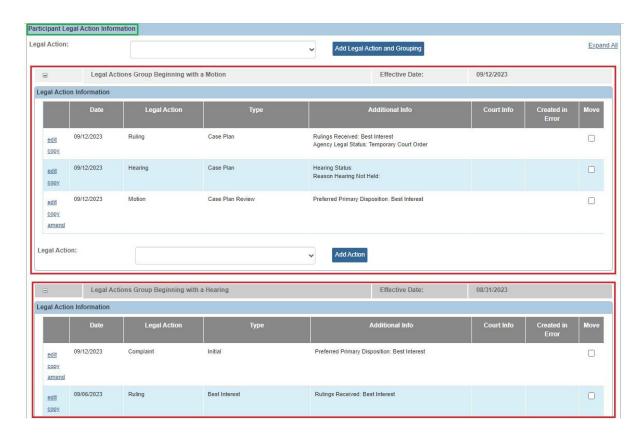
Important Information about Headers, Labels, and Groups

As shown on the next page, each legal action group contains a header (label).

- Each header is labeled as Legal Action Group Beginning with a Legal Action and Effective Date: <mm/dd/yyyy>.
- The headers appear sequentially on the screen beginning with the earliest legal action that started the group and its effective date.
- All of the headers are sorted with the earliest legal action the on bottom (descending).
- The headers are dynamic and will change if/when a new legal action record is added that precedes the current earliest legal action.
- All of the headers are easily viewable when collapsed.
- Below each header is a group of legal actions that apply to it shown in a grid.
- Legal action groups are easily viewable when the (+) "expando" sign in the header is selected to expand the group.
- Each legal action within the group is sorted with earliest legal action on the bottom (descending).
- All legal actions must be in a group, but:
 - Groups can be of one or many records
 - You select how the legal action records are grouped
 - Groupings can be changed at any time and as many times as desired
 - If one method of grouping is created, you can change it and re-group it with another method
- Because the legal actions are now child specific, when the filter includes View Historical, all legal actions outside the current case episode for that child will appear.
- Only one child can be associated to a legal action.
- Ohio SACWIS also has the functionality to copy legal actions. This feature is discussed later in this Knowledge Base Article.
- The Additional Info column displays all rulings received within the ruling and (if a legal status has been recorded) it will also show the legal status.

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 You can move or copy historical legal actions and any legal actions created in error. To do so, click the View Historical radio button or the Created In Error radio button, and then the Filter button. The filtered results will appear in the grid on the Participant Legal Action Information screen.



Ohio Department of Children & Youth

Navigating to the Participant Legal Action Information Screen

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

Note: If you know the **Case ID** number, you can also use the **Search** link to navigate to the **Case Overview** screen.



4. Click the **Legal Actions** link in the **Navigation** menu.

Note: As shown below, the radio button default to **Persons Under Age 22**, but it can be changed to **All Persons**.

Click the Maintain Legal Action link for the appropriate child.



The Participant Legal Action Information screen appears.

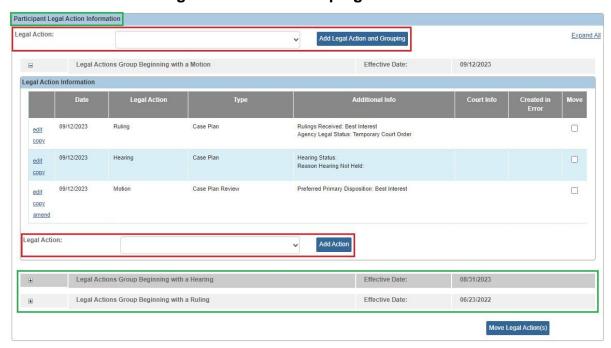
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Grouping a New Legal Action for the First Legal Action Entered

To record a new legal action **in its own group**, complete the following steps:

Important:

- The Add Legal Action and Grouping button is used to create a brand new group. Notice the button is outside of any previously defined groups shown on the screen.
- Two **existing** legal action groups are shown in green.
- If you want to add a legal action to an **existing** legal action group, refer to the steps in the next sub-section.
- The Participant Legal Action Information screen functions similar to the Maintain Custody and Status screen.
- 1. Select the desired value from the **Legal Action** field drop-down list.
- 2. Click the Add Legal Action and Grouping button.



Depending on the value selected, the related legal action screen appears.

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Grouping a New Legal Action if the Legal Action Group Already Exists

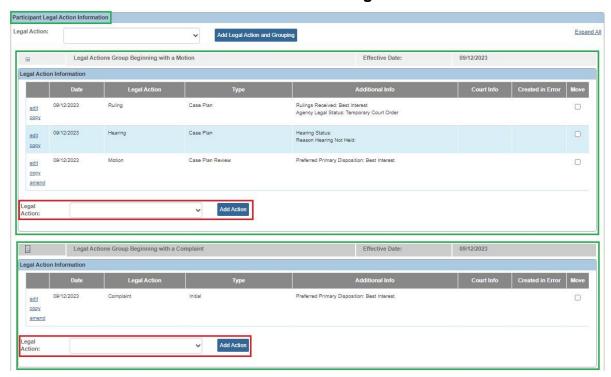
To record a new legal action in an **existing** group, complete the following steps:

Important:

- Two existing legal action groups are shown in green.
- The Add Action button is used to add a legal action value to an existing group.
 Notice the button is inside of a previously defined group on the screen.
- There is an Add Action button within each group.
- If you want to add a legal action value to a **new** legal action group, refer to the steps in the previous sub-section.
- The Participant Legal Action Information screen functions similar to the Maintain Custody and Status screen.
- 1. Select the desired value from the **Legal Action** field drop-down list **for the appropriate group**.

Note: In this example, two **Legal Action** fields are shown in red. You would select the value in the **Legal Action** field for the group where you wanted to attach it.

Click the Add Action button next to that Legal Action field.



Depending on the value selected, the related legal action screen appears.



Moving a Legal Action

Important: You can move historical legal actions and any legal actions created in error. To do so, click the View Historical radio button or the Created In Error radio button, and then the **Filter** button. The filtered results will appear in the grid on the Participant Legal Action Information screen.



As shown on the next page:

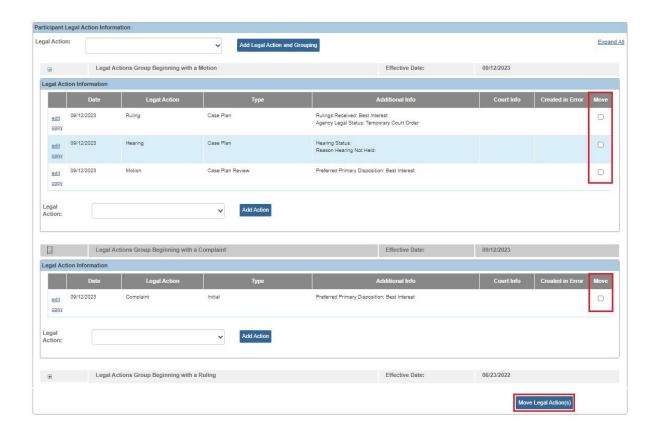
- 1. Navigate to the **Participant Legal Action Information** screen using the steps previously discussed.
- 2. In the **Move** field, select the check box(es) for the legal action(s) that you want to move into another grouping.

Important: All selected legal actions will be moved into the same group. If you want to move several legal actions into different groups, move one group at a time.



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3. Click the Move Legal Action(s) button.



The Participant Legal Action Information screen appears.

4. Select the radio button for the group that you want to move the legal action to.

Important:

- A legal action (s) can be moved into any other existing legal action group.
- As shown in green, the record(s) that you selected to move on the previous screen now show a red indicator stating "record selected for move" in the grid row. In those same rows, the radio button is grayed out because you can't move a record into its current group.
- 5. Click the Save button.
- 6. Repeat these steps to move other legal actions.

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The selected records are moved.

Copying a Legal Action

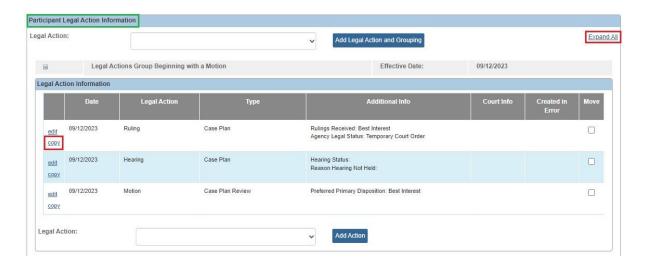
Important: You can copy historical legal actions and any legal actions created in error. To do so, click the View Historical radio button or the Created In Error radio button, and then the **Filter** button. The filtered results will appear in the grid on the Participant Legal Action Information screen.



- 1. Navigate to the Participant Legal Action Information screen using the steps previously discussed.
- 2. Click the **Expand All** link to expand all of the groups and access the **Copy** link.
- 3. Click the **Copy** link in the grid row for the legal action you want to copy.

Note: The screen shot shows an example of copying a ruling record.

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Depending on the legal action selected, the applicable legal action screen appears.

- 4. Complete the required fields on the screen.
- 5. On the legal action screen that appears, you can select a new action participant in the **Action Participant** field.

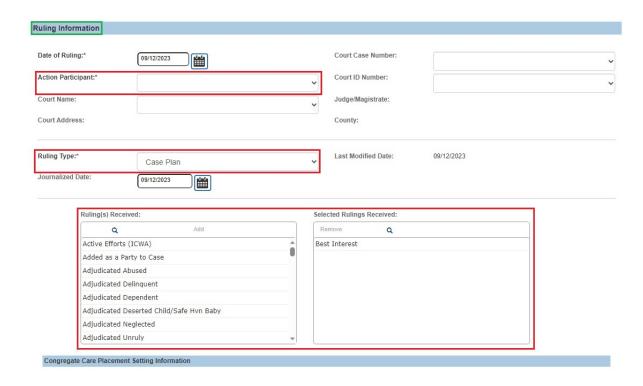
Important: When you select a new action participant for the legal action you are copying, Ohio SACWIS automatically navigates you to the Participant Legal Action **Information** screen of the new action participant selected.

For example, if you are in Johnny's Maintain Legal Action link section and click the Copy link on a legal action, the Participant Legal Action Information screen appears.

However, if you select Joseph's name in the Action Participant field of that copied legal action, Ohio SACWIS automatically navigates you to Joseph's Maintain Legal Action link section.

The system still displays the Participant Legal Action Information screen, but the person name in the screen header is now Joseph's, not Johnny's.

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6. Once the legal action screen is completed, click the **Associate Legal Actions Group** link.

Important:

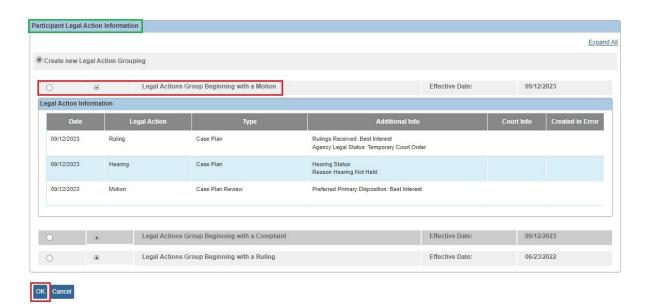
- Although the required fields differ depending on which legal action is copied, the Associate Legal Actions Group link will appear on all legal action related screens in the Associate Legal Action Group section.
- When copying a legal action, when you click the **Associate Legal Actions Group** link, you are now in the **newly selected action participant's record**.



The **Participant Legal Action Information** screen appears displaying the selected legal action group.

- 7. Select the radio button to with which to associate this legal action group.
- 8. Click the **OK** button.

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The **Legal Action** (Motion) displays the grouping selected as shown below.

Important: To change a radio button selection, click the **Associate Legal Actions Group** link again and select another radio button. However, do this **prior** to saving the record.

- 9. Click the Save button.
- 10. Repeat these steps as needed to copy other legal actions.



The **Participant Legal Action Information** screen for the newly selected action participant appears displaying a message that your data has been saved.

Note: For related information, also refer to the following Knowledge Base Articles:

- Entering Hearings and Rulings
- Entering Complaints and Motions

If you have additional questions pertaining to this Deployment Communication, please contact the <u>Customer Care Center</u>.

