

# **Grouping, Moving and Copying Legal Actions**



**Knowledge Base Article**

# Grouping, Moving and Copying Legal Actions

## Table of Contents

<b>Overview .....</b>	<b>3</b>
<b>Important Information about Using Grouping Functionality .....</b>	<b>3</b>
<b>Important Information about Headers, Labels, and Groups .....</b>	<b>4</b>
<b>Navigating to the Participant Legal Action Information Screen .....</b>	<b>6</b>
<b>Grouping a New Legal Action for the First Legal Action Entered .....</b>	<b>7</b>
<b>Moving a Legal Action.....</b>	<b>9</b>
<b>Copying a Legal Action.....</b>	<b>11</b>

# Grouping, Moving and Copying Legal Actions

## 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.

The screenshot displays the 'Participant Legal Action Information' section of the Ohio SACWIS Court module. At the top, there is a 'Legal Action:' dropdown menu and an 'Add Legal Action and Grouping' button, both highlighted with a red box. Below this is a header for a 'Legal Actions Group Beginning with a Motion' with an 'Effective Date' of 09/12/2023. The main area is a table titled 'Legal Action Information' with columns for Date, Legal Action, Type, Additional Info, Court Info, Created in Error, and Move. Three rows of legal actions are listed: a Ruling (Case Plan), a Hearing (Case Plan), and a Motion (Case Plan Review). Each row has 'edit' and 'copy' links, and a 'Move' checkbox. At the bottom, there is another 'Legal Action:' dropdown menu and an 'Add Action' button, also highlighted with a red box.

	Date	Legal Action	Type	Additional Info	Court Info	Created in Error	Move
<a href="#">edit</a> <a href="#">copy</a>	09/12/2023	Ruling	Case Plan	Rulings Received: Best Interest Agency Legal Status: Temporary Court Order			<input type="checkbox"/>
<a href="#">edit</a> <a href="#">copy</a>	09/12/2023	Hearing	Case Plan	Hearing Status: Reason Hearing Not Held:			<input type="checkbox"/>
<a href="#">edit</a> <a href="#">copy</a> <a href="#">amend</a>	09/12/2023	Motion	Case Plan Review	Preferred Primary Disposition: Best Interest			<input type="checkbox"/>

## Grouping, Moving and Copying Legal Actions

### 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.

## Grouping, Moving and Copying Legal Actions

**Participant Legal Action Information**

Legal Action:  [Add Legal Action and Grouping](#) [Expand All](#)

---

Legal Actions Group Beginning with a Motion Effective Date: 09/12/2023

**Legal Action Information**

	Date	Legal Action	Type	Additional Info	Court Info	Created in Error	Move
<a href="#">edit</a> <a href="#">copy</a>	09/12/2023	Ruling	Case Plan	Rulings Received: Best Interest Agency Legal Status: Temporary Court Order		<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">edit</a> <a href="#">copy</a>	09/12/2023	Hearing	Case Plan	Hearing Status: Reason Hearing Not Held:		<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">edit</a> <a href="#">copy</a> <a href="#">amend</a>	09/12/2023	Motion	Case Plan Review	Preferred Primary Disposition: Best Interest		<input type="checkbox"/>	<input type="checkbox"/>

Legal Action:  [Add Action](#)

---

Legal Actions Group Beginning with a Hearing Effective Date: 08/31/2023

**Legal Action Information**

	Date	Legal Action	Type	Additional Info	Court Info	Created in Error	Move
<a href="#">edit</a> <a href="#">copy</a> <a href="#">amend</a>	09/12/2023	Complaint	Initial	Preferred Primary Disposition: Best Interest		<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">edit</a> <a href="#">copy</a>	09/06/2023	Ruling	Best Interest	Rulings Received: Best Interest		<input type="checkbox"/>	<input type="checkbox"/>

- 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.

**Participant Legal Action Filter Criteria**

Current Episode 
  View Historical 
 Created In Error:  Exclude  Include

[Filter](#)

# Grouping, Moving and Copying Legal Actions

## 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.

The screenshot shows the Ohio SACWIS Case Overview screen. The top navigation bar has tabs for Home, Intake, Case, Provider, Financial, and Administration. The Case tab is selected. Below the navigation bar, there are sub-tabs for Workload, Court Calendar, and Placement Requests. The Workload sub-tab is selected. On the left, there is a navigation menu with options like Case Overview, Activity Log, Intake List, and Legal Actions. The Legal Actions link is highlighted. The main content area displays case details for 'Adoption' with Case ID 123456, including address, agency, and worker information.

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**.

5. Click the **Maintain Legal Action** link for the appropriate child.

The screenshot shows the Case Legal Actions / Delinquency Participants Filter Criteria screen. The filter criteria are set to 'Persons Under Age 22'. Below the filter is a 'Filter' button. The main content area shows a table of Case Participants with columns for Case Participants, DOB, and Maintain Legal Action. The 'Maintain Legal Action' link for the first participant is highlighted.

Case Participants	DOB	Maintain Legal Action	Maintain Delinquency
Sacwis, Susie	05/09/2006	<a href="#">Maintain Legal Action</a>	<a href="#">Maintain Delinquency</a>
Test, Case Member	12/22/2001	<a href="#">Maintain Legal Action</a>	<a href="#">Maintain Delinquency</a>

The **Participant Legal Action Information** screen appears.

## Grouping, Moving and Copying Legal Actions

### 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.

The screenshot displays the 'Participant Legal Action Information' interface. At the top, there is a 'Legal Action:' dropdown menu and an 'Add Legal Action and Grouping' button, both highlighted with a red box. Below this is a table of legal actions with columns for Date, Legal Action, Type, Additional Info, Court Info, Created in Error, and Move. The table contains three rows of data. Below the table is another 'Legal Action:' dropdown menu and an 'Add Action' button, also highlighted with a red box. At the bottom, there are two green-bordered boxes representing existing legal action groups, each with an 'Effective Date' field. A 'Move Legal Action(s)' button is located at the bottom right of the screen.

	Date	Legal Action	Type	Additional Info	Court Info	Created in Error	Move
<a href="#">edit</a> <a href="#">copy</a>	09/12/2023	Ruling	Case Plan	Rulings Received: Best Interest Agency Legal Status: Temporary Court Order			<input type="checkbox"/>
<a href="#">edit</a> <a href="#">copy</a>	09/12/2023	Hearing	Case Plan	Hearing Status: Reason Hearing Not Held:			<input type="checkbox"/>
<a href="#">edit</a> <a href="#">copy</a> <a href="#">amend</a>	09/12/2023	Motion	Case Plan Review	Preferred Primary Disposition: Best Interest			<input type="checkbox"/>

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

## Grouping, Moving and Copying Legal Actions

### 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.

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

The screenshot displays the 'Participant Legal Action Information' interface. At the top, there is a 'Legal Action:' dropdown menu and an 'Add Legal Action and Grouping' button. Below this, two legal action groups are shown, each enclosed in a green border. The first group is titled 'Legal Actions Group Beginning with a Motion' and has an effective date of 09/12/2023. It contains a table with three rows of legal actions: 'Ruling', 'Hearing', and 'Motion'. The second group is titled 'Legal Actions Group Beginning with a Complaint' and also has an effective date of 09/12/2023. It contains a table with one row of legal actions: 'Complaint'. In both groups, the 'Legal Action:' dropdown menu and the 'Add Action' button are highlighted with a red border, indicating the steps to be followed.

Date	Legal Action	Type	Additional Info	Court Info	Created in Error	Move
09/12/2023	Ruling	Case Plan	Rulings Received: Best Interest Agency Legal Status: Temporary Court Order			<input type="checkbox"/>
09/12/2023	Hearing	Case Plan	Hearing Status: Reason Hearing Not Held:			<input type="checkbox"/>
09/12/2023	Motion	Case Plan Review	Preferred Primary Disposition: Best Interest			<input type="checkbox"/>

Date	Legal Action	Type	Additional Info	Court Info	Created in Error	Move
09/12/2023	Complaint	Initial	Preferred Primary Disposition: Best Interest			<input type="checkbox"/>

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



## Grouping, Moving and Copying Legal Actions

### 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.

The image shows two screenshots of a web application interface. The top screenshot is titled "Participant Legal Action Filter Criteria" and contains two radio buttons: "Current Episode" (unselected) and "View Historical" (selected). To the right, there are two more radio buttons: "Created In Error: Exclude" (selected) and "Include" (unselected). Below this is a blue "Filter" button. The bottom screenshot is titled "Participant Legal Action Information" and features a "Legal Action:" dropdown menu, a blue "Add Legal Action and Grouping" button, and a link labeled "Expand All" in the top right corner.

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.

## Grouping, Moving and Copying Legal Actions

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

The screenshot displays the 'Participant Legal Action Information' interface. It features three sections, each representing a different legal action group. Each section includes a header with the group name and an 'Effective Date', followed by a table of individual legal actions. The 'Move' column in each table is highlighted in red, and the 'Move Legal Action(s)' button at the bottom right is also highlighted in red.

Date	Legal Action	Type	Additional Info	Court Info	Created in Error	Move
09/12/2023	Ruling	Case Plan	Rulings Received: Best Interest Agency Legal Status: Temporary Court Order			<input type="checkbox"/>
09/12/2023	Hearing	Case Plan	Hearing Status: Reason Hearing Not Held:			<input type="checkbox"/>
09/12/2023	Motion	Case Plan Review	Preferred Primary Disposition: Best Interest			<input type="checkbox"/>

Date	Legal Action	Type	Additional Info	Court Info	Created in Error	Move
09/12/2023	Complaint	Initial	Preferred Primary Disposition: Best Interest			<input type="checkbox"/>

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.

# Grouping, Moving and Copying Legal Actions

Create new Legal Action Grouping

Legal Actions Group Beginning with a Motion Effective Date: 09/12/2023

Legal Action Information						
Date	Legal Action	Type	Additional Info	Court Info	Created in Error	
09/12/2023	Ruling	Case Plan	Rulings Received: Best Interest Agency Legal Status: Temporary Court Order			
09/12/2023 record selected for move	Hearing	Case Plan	Hearing Status: Reason Hearing Not Held:			
09/12/2023 record selected for move	Motion	Case Plan Review	Preferred Primary Disposition: Best Interest			

Legal Actions Group Beginning with a Complaint Effective Date: 09/12/2023

Legal Actions Group Beginning with a Ruling Effective Date: 06/23/2022

Legal Actions Group Beginning with a Hearing Effective Date: 11/03/2020

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.

**Participant Legal Action Filter Criteria**

Current Episode  View Historical
 Created In Error:  Exclude  Include

**Participant Legal Action Information**

Legal Action:   [Expand All](#)

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.

## Grouping, Moving and Copying Legal Actions

Participant Legal Action Information

Legal Action:  Add Legal Action and Grouping Expand All

Legal Actions Group Beginning with a Motion Effective Date: 09/12/2023

	Date	Legal Action	Type	Additional Info	Court Info	Created in Error	Move
<a href="#">edit</a> <a href="#">copy</a>	09/12/2023	Ruling	Case Plan	Rulings Received: Best Interest Agency Legal Status: Temporary Court Order			<input type="checkbox"/>
<a href="#">edit</a> <a href="#">copy</a>	09/12/2023	Hearing	Case Plan	Hearing Status: Reason Hearing Not Held:			<input type="checkbox"/>
<a href="#">edit</a> <a href="#">copy</a>	09/12/2023	Motion	Case Plan Review	Preferred Primary Disposition: Best Interest			<input type="checkbox"/>

Legal Action:  Add Action

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.

# Grouping, Moving and Copying Legal Actions

**Ruling Information**


Date of Ruling:\*   Court Case Number:  


Action Participant:\*   Court ID Number:  

Court Name:   Judge/Magistrate:


Court Address:  County:

---


Ruling Type:\*   Last Modified Date: 09/12/2023

Journalized Date:  

---

Ruling(s) Received:  

- Active Efforts (ICWA)
- Added as a Party to Case
- Adjudicated Abused
- Adjudicated Delinquent
- Adjudicated Dependent
- Adjudicated Deserted Child/Safe Hvn Baby
- Adjudicated Neglected
- Adjudicated Unruly

Selected Rulings Received:  

- Best Interest

Congregate Care Placement Setting Information

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**.

**Associate Legal Action Group**

[Associate Legal Actions Group](#)

Ruling has been Created in Error

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.

## Grouping, Moving and Copying Legal Actions

**Participant Legal Action Information** [Expand All](#)

Create new Legal Action Grouping

Legal Actions Group Beginning with a Motion Effective Date: 09/12/2023

**Legal Action Information**

Date	Legal Action	Type	Additional Info	Court Info	Created in Error
09/12/2023	Ruling	Case Plan	Rulings Received: Best Interest Agency Legal Status: Temporary Court Order		
09/12/2023	Hearing	Case Plan	Hearing Status: Reason Hearing Not Held:		
09/12/2023	Motion	Case Plan Review	Preferred Primary Disposition: Best Interest		

Legal Actions Group Beginning with a Complaint Effective Date: 09/12/2023

Legal Actions Group Beginning with a Ruling Effective Date: 06/23/2022

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.

**Associate Legal Action Group**

[Associate Legal Actions Group \\*](#)

Legal Actions Group Beginning with a Motion Effective Date: 09/12/2023

Ruling has been Created in Error

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 [Customer Care Center](#).