Creating an Adoption Case and Reactivating a Child in an Adoption Case

Knowledge Base Article

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Overview

This article discusses the steps for creating an **Adoption Case** in Ohio SACWIS, including the processes that need to occur prior to the creation of an **Adoption Case**. This article also discusses the steps for Inactivating and Reactivating a **Child** in an Adoption Case. However, this document does not provide a comprehensive list of all adoption-related work items that need to be completed.

Prior to creating an **Adoption Case**, an agency should complete the following steps:

- Hold a **Staffing Meeting** to ensure a smooth case transfer.
  - Determine how the Adoption Case(s) for sibling groups will be joined /split.
- Review and approve the **Recommended for PC Plan**, then Approved each **Adoption Family Case Plan** per child, if applicable.
- Verify that all family **Relationships** (especially the Biological Mother and Biological Father relationships) have been recorded in the ongoing case.
- Verify that the Race, Ethnicity, and Date of Birth, have been recorded for each parent.
- Verify that the Race, Ethnicity, Date of Birth, ICWA Protection and Primary Native Language have been recorded for each child moving into the Adoption Case.
- Complete all additional open work items such as (but not limited to):
  - End-date all **Case Services** (excluding open/active placements).
  - Mark any outstanding **Draft Activity Logs** as Completed.
  - Verify all **Court Entries** have been recorded in the **Legal Actions** link.
  - Verify the **Family Case Plan** has been **Updated** for either Case Closure OR to remove the child(ren) moving to an Adoption Case.
 - Conduct the **Case Review** or **SAR**, if applicable.

Important: If the above-mentioned items are not complete, the system will not allow the creation of the Adoption Case. This article will explain the steps needed to complete the work items. The system will display a list of all validations prior to ability to create the Adoption Case.
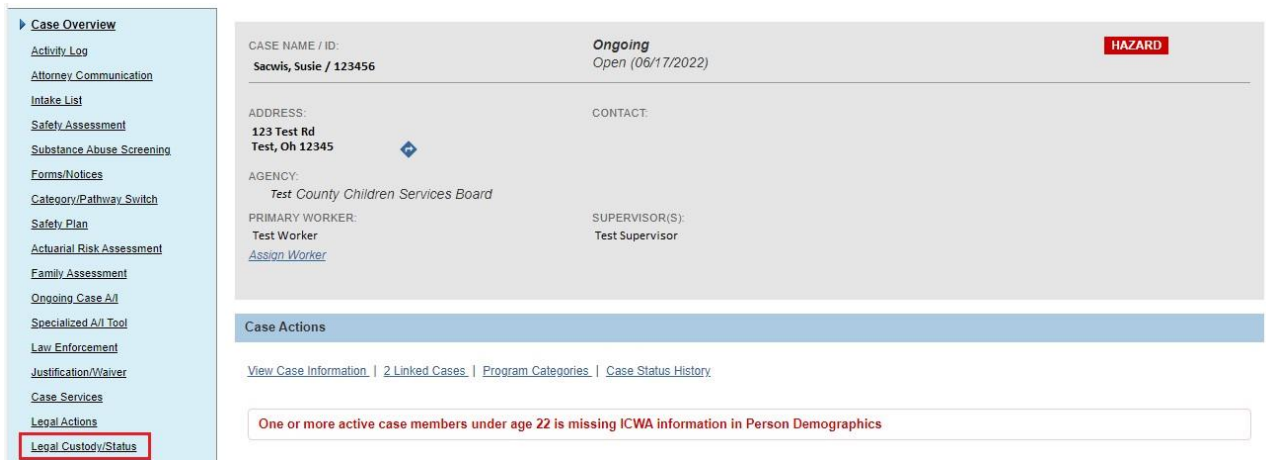
Navigating to the Child's Biological Case Overview Screen

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 to navigate to the **Case Overview** screen.
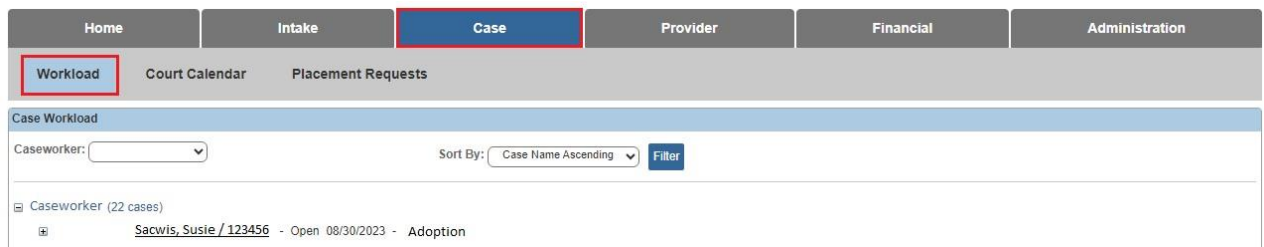
The **Case Overview** screen appears.

Recording a Court Ruling

Prior to creating an Adoption Case, the child must have an **Agency Legal Status** of either **Permanent Custody (PC)** or **Permanent Surrender (PS)** recorded in the Ongoing Case.

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In addition, the **TPR Mother** and **TPR Father** must be recorded in the Ongoing Case to create the Adoption Case.

Note: The **TPR Mother** and **TPR Father** rulings can either be recorded as a **Ruling Type** (as shown below in red) or as **Rulings Received** value for a Ruling Type of **Permanent Custody** or **Voluntary Permanent Surrender** (as shown below in green).

For additional information, please refer to the following Knowledge Base Article: **Recording a Court Ruling Record with a Legal Status**.

Correcting an Unknown Parent for AFCARS Data

Since the inception of the **AFCARS** initiative in January 1999, it is now mandatory to track certain data within Ohio SACWIS. One type of data tracked is the status of a child's biological parents. AFCARS does not accept "unknown" as a parental status, even if a child's father and/or mother is unknown.

In these situations, the unknown parent's person record must be added into Ohio SACWIS as a case member with a relationship of **Biological Father** or **Biological Mother** to the child. Then, that parent's record will be marked as an **Inactive** case member.

Important: These steps must occur **prior** to creating a child's adoption record to even create the Adoption Case.

To add an Unknown person record for an unknown parent, complete the following steps:

1. Navigate to the child's **Case Overview** screen using the steps previously discussed.

The **Case Overview** screen appears.

2. Click the **View Case Information** link.

The **Case Information** screen appears displaying the **Case Detail** tab screen.

3. Click the **Members** tab.

The **Case Members** screen appears.

4. If the unknown parent already appears in the grid, skip to the **Marking the Unknown Parent's Record as Inactive** section later in this document.

5. If the unknown parent does not appear in the grid, click the **Add Member** button.

	CRP		Case Member		Begin Date	
edit	◉	**HAZARD** **Test, Adult** Race: American Indian, White Hispanic/Latino: No	Female Age 46, DOB 09/12/1977		08/09/2001	🗑
edit	○	**HAZARD** **Test, Adult** Race: Black/African American Hispanic/Latino: No	Male Age 45, DOB 06/01/1978		01/30/2019	🗑
edit	○	**Test, Adult** Race: White Hispanic/Latino: No	Female Age 40, DOB 08/20/1983		11/02/2020	🗑

Inactive Member List

			Case Member	Begin Date
view	activate	**DECEASED** **Test, Adult** Race: White Hispanic/Latino: No	Male Age 51, DOB 08/19/1972	12/16/2016
⊞				
view	activate	**Test, Adult** Male Age 27, DOB 01/30/1996 Race: Unable to Determine Hispanic/Latino: **Missing**		03/18/2011
⊞				

Add Member   **Copy Address**   **Copy Phone Number**

Apply   **Save**   **Cancel**

The **Person Search Criteria** screen appears.

6. Enter **Search Criteria** into the appropriate fields OR enter the **Person ID**, if known.

7. Click the **Search** button.

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Search For Person

Person ID:

~ OR ~

SSN:

Note: If Person ID or SSN are entered, all other search criteria will be ignored

OR

Last Name: First Name:

Gender:

Middle Name:

DOB: ~ OR ~   Age Range:

From Age   To Age

Reference, TCN, and Address Criteria ⌄

Name Match Precision
Returns results matching entered names including AKA names/nicknames

+ AKA/Nicknames

Sort by:
Relevance (Highest-Lowest)

Fewer Results   More Results

[Search]   [Clear Form]   [Return]

8. If the desired person appears in the **Person Search Results** grid, click **select** beside the appropriate person.

   - If you selected a person, skip to **Step 12**.

9. If no results are turned, click the **Create New Person** button.

Person Search Results

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

☐ Include only active case members

		Person Name / ID	Address	Gender	(Age) DOB	Active Case
select		Test / 22222	Test Address	Female	(14) 07/03/2009	Yes
		Related Persons ⌄				

Create New Person

The **Profile** screen appears, displaying the Basic tab screen.

10. As shown in the next screen shot, enter data in the fields to create a person record for the unknown parent.

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- As mentioned previously, Ohio SACWIS will not allow you to create a person with the first or last name of **Unknown**, so create the record with a First Name of **Father of <child's first name>** or **Mother of <child's first name>**.

  Example: If the child's full name is **Rose Red**, the parent's First Name would be **Father of Rose** or **Mother of Rose**.

- The unknown parent's Last Name can be the same as the child's name.

  Example of a Full Name: Father of Rose Red or Mother of Rose Red.

- For AFCARS tracking purposes, enter the unknown parent's date of birth (DOB) and race (**Demographics** tab). Even if the DOB and race are not known for certain, you must record a "best guess" from all the information available.

  Example: An unknown father's year of birth can be the same as the mother's year of birth, with a typical birth date being 01/01/19XX.

- If needed, click the **Estimated DOB** field check box.

  Note: When checked, this field does not appear on any report or elsewhere in the system. If just indicates that the birth date has been estimated.

11. When complete, click the **Save** button at the bottom of the **Person Information** screen.

The **Members** tab screen appears displaying the new information as shown in green below.

12. Click, **Save**.

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Case Detail   Members   Relationships   Associated Persons

Case Members

Active Member List

Warning: Changing the Case Reference Person will change the Case Name and Case Address

	CRP		Case Member		Begin Date	
edit	●	**HAZARD** **Test, Adult** Race: American Indian, White Hispanic/Latino: No	Female Age 46, DOB 09/12/1977		08/09/2001	🗑
edit	○	**HAZARD** **Test, Father** Race: Black/African American Hispanic/Latino: No	Male Age 45, DOB 06/01/1978		01/30/2019	🗑
edit	○	**Test, Adult** Race: White Hispanic/Latino: No	Female Age 40, DOB 08/20/1983		11/02/2020	🗑

Inactive Member List

			Case Member	Begin Date
view	activate	**DECEASED** **Test, Adult** Race: White Hispanic/Latino: No	Male Age 51, DOB 08/19/1972	12/16/2016
⊞				
view	activate	**Test, Adult** Male Age 27, DOB 01/30/1996 Race: Unable to Determine Hispanic/Latino: **Missing**		03/18/2011
⊞				

[Add Member] [Copy Address] [Copy Phone Number]

[Apply] [Save] [Cancel]

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Entering a Biological Relationship to the Child

1. Click the **Relationships** tab.
2. Click the **edit** link in the appropriate child's grid row.

The **Relationship** tab screen appears.

The **Relationship Editor** grid appears.

1. Select the appropriate relationship for each person from the drop-down menu, for example, if selecting the father, select, **Biological Father**, etc.

2. Click the **Save** button.

Refer to the **Managing Person – Level Relationships KBA** for additional details.

Marking the Unknown Parent's Record as Inactive

1. Click the **Members** tab. The **Case Members** screen appears.
2. Click the **Edit** link in the appropriate row.

The **Member Details** screen appears.

3. In the **End Date** field, select the appropriate date.
4. In the **Reason for Deactivation** field, enter the appropriate reason.
5. Click the **OK** button.

The **Case Members** screen appears without displaying that member in the grid.

6. Click the **Save** button on the **Case Members** screen. The **Case Overview** screen appears.
7. To view the inactive case member, navigate back to the **Members** tab.

As shown above, the Inactive member(s) appear in the **Inactive Member List** grid. The unknown biological parent's information is now ready for tracking in AFCARS.

Creating a Recommended PC Family Case Plan for an Adoption Case

In Ohio SACWIS, the information in an **Approved Adoption Family Case Plan** will copy over to create an **Adoption Case** if:

- An **Adoption Family Case Plan** is created from a Recommended for PC Plan.

- The Adoption Family Case Plan type is **Approved.**

- All the children in the Adoption Family Case Plan will be in the same Adoption Case.

- The permanency goal is **Adoption**.

In a sibling group, if each child is to have their own Adoption Case, a separate **Adoption Family Case Plan** can be created as the system allows for multiple plans. Each plan that meets the criteria listed above will copy over with a status of **Initial – Approved.**

However, an Approved **Adoption Family Case Plan** is not required to create the Adoption Case. An initial **Adoption Family Case Plan** can also be created within the Adoption Case. To create a Recommended for PC Plan > an Approved Adoption Family Case Plan, refer to the Completing a Family Case Plan.

Creating the Adoption Case

To create the **Adoption Case**, complete the following steps.

Important: Only users with an Ohio SACWIS security role of **Adoption Case Creator** have access to the **Adoption** link that is needed to complete these steps.

1. Navigate to the appropriate **Case Overview** screen using the steps previously discussed.

2. Click, **Adoption**, in the **Navigation** menu.

The **Child Members** screen appears. On the screen, you can create a new Adoption Case OR add associated siblings into an already existing Adoption Case.

3. To add children to an existing Adoption Case, click the check box next to the appropriate child(ren)'s name in the **Child Members** section.

4. In the **Case Reference Person** field, select the appropriate name.

Note: The drop-down list populates with all active children who have a legal status of **PC** or **PS**.

5. Click the **Create Adoption Case** button.

6. A message will appear; click the **OK** button (if appropriate).
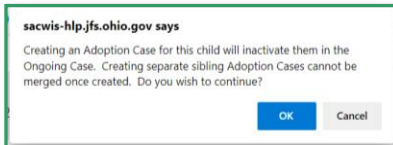
The **Adoption Case** has been created. The system will display the conformation page with the newly created Adoption Case ID.

1. To access the Adoption Case, click the **Access Adoption Case** button.

2. To add assigned workers, click the Worker Assignment button (optional).

3. Otherwise, click the **Close** button.

Inactivating a Child in an Adoption Case

This section discusses how to **Inactivate** a child in an Adoption Case.

Note: The child's Legal Status of **PC** or **PS** must be terminated with a termination reason other than Adoption Finalized in order for the **Inactivate** link to appear.

The **Inactivate** function should be utilized when:

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- The child is no longer in the **Agency Legal Status** of **PC** or **PS**. (For example, PC was overruled, and the child was returned to TC status). If the child may be reactivated in their Adoption Case at some point, then they must be reactivated in their biological case.

- The child's Legal Status changes to **PPLA**.

- The child ages out of the system (emancipated).

If the child's legal status/custody episode and placement records are to remain **Open**, the child must be **Active** in another case **prior** to Inactivating. If the intent is to **Close** the Adoption Case (closing all case services) then the legal status/custody episode and placement record must be terminated and discharged.

Note: If the child will be finalizing in an Adoption home, this Inactivation functionality is not used.

Complete the following steps to **Inactivate** a child in an Adoption Case.

1. Navigate to the appropriate **Case Overview** screen using the steps previously discussed.

2. Click, **View Member Details**.

The **Adoption Members** tab screen appears.

1. Click the **Inactivate** link in the row of the child you wish to make inactive.

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Creating an Adoption Case and Reactivating a Child in an Adoption Case

If there are outstanding work items that need to be resolved for the child, the relevant **Validation Messages** will appear as shown in the example below.

1. Resolve all the outstanding validations (if applicable).
2. Click the **Inactivate** link for the desired person.

Please correct the following data validation errors:
- All draft Provider Activity Logs for the child must be resolved.
- The child is a member of an Active Case Plan. Please amend the case plan.
- All ticklers associated to the child must be disposed.
- A placement discharge date and discharge reason must be entered on the child's placement record OR reactivate the child in their ongoing case.
- The child's custody episode must be terminated OR reactivate the child in their ongoing case.

The **Member Details** screen appears.

Note: The **Begin Date** displays the date the child became a member of the Adoption Case. This date cannot be changed.

1. Enter the **End Date** the child will be an Inactivated member. (Required)
2. Select the **Reason for Deactivation** from the drop-down menu. (Required)
3. Record any additional **Comments** if applicable. (Optional)
4. Click the **OK** button.

The **Adoption Members** tab screen appears displaying the inactivated child in the **Inactive Adoption Members List**.

Note: You can hover the cursor over the **N** (Narrative) icon in the **Deactivation Reason** column to display the selected Reason for Deactivation and any comments recorded on the Deactivation page.

1. Click the **Save** button.

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Reactivating a Child in an Adoption Case

Complete the following steps to **Reactivate** a child in an Adoption Case.

Important: Only users with an Ohio SACWIS security role of **Adoption Case Creator** have access to the **Adoption** link that is needed to complete these steps.

1. Navigate to the appropriate **Case Overview** screen using the steps previously discussed.

2. Click the **Adoption** link in the **Navigation** menu.

Creating an Adoption Case and Reactivating a Child in an Adoption Case

The **Adoption** scree appears, displaying the **Adoption Case Creation/Reactivation** grid. As shown in red below, the child to be Reactivated displays in the **Reactivation** section under the **Case ID** number of the child's **Adoption Case**.

Important: For the child to appear in the Reactivation section, a new **Permanent Custody/Permanent Surrender** legal status must be recorded. In addition, the TPR rulings for the mother and the father must be recorded.

3. Click the **Reactivate** button.

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If there are outstanding work items that need to be resolved for the child, the relevant **Validation Messages** will appear as shown in the example below.

4. Resolve all of the outstanding validations (if applicable).

5. Click the **Reactivate** button.

The **Case Overview** screen appears displaying a message that the child has been reactivated. The child becomes a member of the Adoption Case with a new Begin Date.

Note: When **Reactivating**, a new Adoption Case is **NOT** created.

6. To view the reactivated child, navigate to the **Case Overview** screen of the Adoption Case using the steps previously discussed.

7. Click the **View Member Details** link on the **Case Overview** screen.

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The **Adoption Members** tab screen displays the reactivated child in the **Active Adoption Members List** grid with the child's new Begin Date.

For additional Information about Adoption Cases, please refer to the following KBAs:

To Seal an Adoptive Child's Record, please refer to the following Knowledge Base Article:

- [Finalizing an Adoption Record and Closing the Adoption Case](#)

- [Maintaining Adoption Case Members Information](#)

- [Linking Intakes to a Case](#)

For additional information about the Confidentiality, please refer to the **Understanding Adoption Confidentiality Functionality KBA**.

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