Maintaining Adoption Case Members Information

Knowledge Base Article

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Department of
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Overview

This Knowledge Base Article describes how to navigate from the **Adoption Case Overview** screen to the **View Member Details** screens, which contain the following tabs:

- Adoption Members
- A/I Members
- Relationships
- Adoption Details
- Associated Persons

Adoption Members	A/I Members	Relationships	Adoption Details	Associated Persons

Adoption Members Details

Active Adoption Members List

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

CRP	Person ID	Name	DOB	Age	Gender	Race	Hispanic/Latino	ICWA	Begin Date
⦿	123456	Sacwis, Susie	07/03/2009	14	Female	White	No	None	11/21/2022

Inactive Adoption Members List

This article explains how to use each tab and what information to record on each tab.

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Navigating to the View Member Details Screens

To navigate to the **View Member Details** screens, 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 to navigate to the **Case Overview** screen.
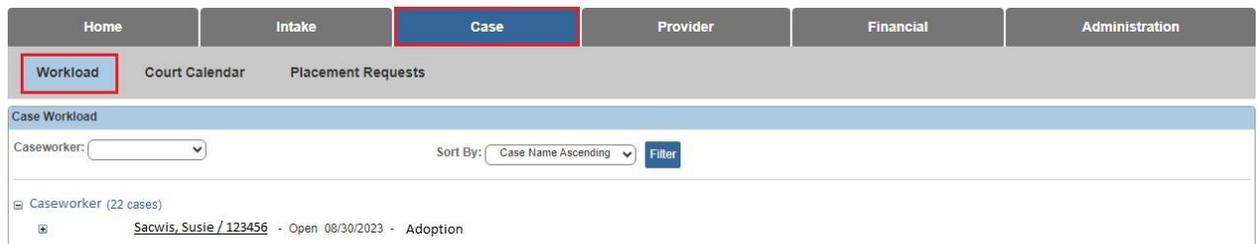
The **Case Overview** screen appears.

4. Click the **View Member Details** link.

Maintaining Adoption Members Details

The **Adoption Members** tab appears.

| | Adoption Members | A/I Members | Relationships | Adoption Details | Associated Persons |

Adoption Members Details

Active Adoption Members List

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

CRP	Person ID	Name	DOB	Age	Gender	Race	Hispanic/Latino	ICWA	Begin Date
⦿	123456	Sacwis, Susie	07/03/2009	14	Female	White	No	None	11/21/2022

Inactive Adoption Members List

CRP	Person ID	Name	DOB	Age	Gender	Race	Hispanic/Latino	ICWA	Begin Date	Deactivation Reason

No Results Returned.

The **Adoption Members** tab lists the child (or children if they are members of a sibling group) that have an agency **Legal Status** of **Permanent Custody** or **Permanent Surrender** and are members of the **Adoption Case**.

- The **Active Adoption Members List** displays the **Person IDs** of children who are **Active** members of the adoption case.

- The **Inactive Adoption Members List** displays the **Person IDs** of children who are **Inactive** members of the adoption case. (For example, the children on the case that have a sealed/secured adoption record.)

- The **Adoption Members Details** screen displays a **CRP** column with radio button (similar to the **Case Members** screen in an **Ongoing** case).

- The **Person ID**, **Name**, **DOB**, **Age**, **Gender**, **Race**, and **Hispanic/Latino** value will display for each adoption case member as entered on the Person Profile record.

- The **Begin Date** for the adoption case member is the adoption case creation date or the date they were associated to the adoption case. This date cannot be edited.

Changing the Adoption Member Case Reference Person (CRP)

Complete the following steps to change the **Case Reference Person (CRP)** of the Adoption Case.

Important: To change the **CRP**, the user must be **Assigned** to the case and must have the **CRP Updater User Group**.

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1. Select the **CRP** radio button in the row of the person you wish to designate as the CRP.

2. Click the **Save** button at the bottom of the **Adoption Members** tab.

Note: An **Inactive** Adoption Case Member can be the **CRP**. However, after the CRP has been changed to an **Active** Adoption Case Member, an Inactive Adoption Case Member cannot be selected as the CRP.

Changing an Adoption Case Member Status from Active to Inactive

Complete the following steps to change an **Adoption Case Member's** status from **Active** to **Inactive**.

Note: The child's **Legal Status** of **Permanent Custody/Permanent Surrender** must be terminated in order for the **Inactivate** link to appear.

1. Click the **Inactivate** link in the row of the person you wish to make **Inactive**.

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.

> **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.

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

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3. Click the **Inactivate** link for the desired person.

The **Member Details** screen appears.

4. Enter the **End Date** the child will be an Inactivated member. (Required)

5. Select the **Reason for Deactivation** from the drop-down list. (Required)

6. Record any additional **Comments** if applicable. (Optional)

7. Click the **OK** button.

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

Note: The user 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.

8. Click the **Save** button.

Viewing A/I Members Details

1. Click the **A/I Members** tab.

The **A/I Members Details** screen appears.

The **A/I Members** tab lists the persons connected to the adoption case because they are an **Intake Participant** on an **Intake** that has been linked to the **Adoption Case**.

*   The **Active A/I Members List** displays the **Person IDs** of individuals who are **Active A/I Members** in an **Intake** linked to the adoption case.

*   The **Inactive A/I Members** List displays the **Person IDs** of individuals who are **A/I Members** in a **Completed Intake** that is linked to the adoption case.

*   The **Person ID**, **Name**, **DOB**, **Age**, **Gender**, **Race**, and **Hispanic/Latino** value will display for each **A/I Member** as entered on the **Person Profile** record.

*   The **Begin Date** for the **A/I Member** is the date that the **Intake** (in which they are a participant) was linked to the adoption case. This date cannot be edited.

*   The **Intake ID(s)** linking an **A/I Member** to an adoption case display as a hyperlink to the **Intake** record.

Maintaining the Relationships Details

1. Click the **Relationships** tab.

The **Relationships** tab appears.
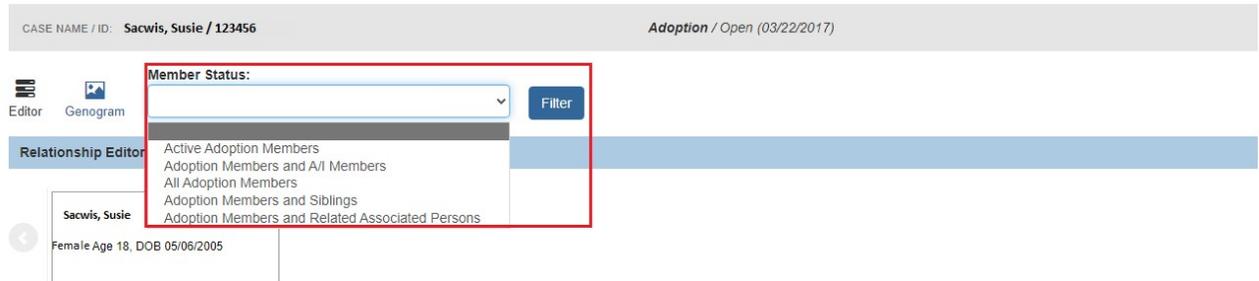
The **Relationships** tab includes a drop-down menu:

- **Active Adoption Members** link includes all of the **Adoption Members**.

- **Adoption Members & A/I Members Relationship** link includes the relationships between the **Adoption Members** and the **A/I Members**.

- **All Adoptions Members** link includes the **Adoptions Members** and **Sibling Relationship**.

- **Adoption Members and Siblings** link includes all of the **Adoption Members** (both Active and Inactive) with a **Sibling Relationship** (i.e., Biological Sister, Half-Brother, Stepbrother). This link includes the **Add Sibling** option.

- **Adoption Members and Related Associated Persons** link includes all of the **Adoption Members, Siblings** and any other **Persons Associated** with the case.

2. To view the **Sibling Relationships** for an **Adoption Member**, click the member's **Name** hyperlink.

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Add a Sibling/Relationship Information Record

To add new **Siblings** to an existing **Adoption Member** in this case, complete the following steps:

1. Select **Adoption Members and Siblings** from the **Member Status** drop-down menu.

2. Click the **Add Sibling Information** button.

The **Person Search Criteria** screen appears.

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

Sort by:

Relevance (Highest-Lowest)

+ AKA/Nicknames

Fewer Results   More Results

Search   Clear Form   Return

3. Enter search criteria into the appropriate fields OR enter the **Person ID**, if known.

4. Click the **Search** button.

5. If the desired person appears, click the **Select** link for that person in the **Person Search Results** section.

   - If you selected a person, skip to **Step 10**.

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, Sibling / 22222	Test Address	Female	(14) 07/03/2009	Yes
		Related Persons ∨				

Create New Person

6. If no results are returned, click the **Create New Person** button.

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Person Search Results

No Results Returned.

Create New Person

The **Person Information** screen appears.

7. As shown below, enter data in the fields to create a **Person Profile** record.

8. Click the **Save** button.

The **Sibling Details** screen appears.

9. Select the appropriate **Relationship** from the drop-down list. (Required)

10. Check the **Include in Sibling Group** checkbox if appropriate. (Optional)

11. Click the **OK** button.

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The **Siblings/Relationships** tab appears. A row for the new relationship displays in the Adoption Member's **Sibling Relationships** grid.

12. Click the **Save** button at the bottom of the **Siblings/Relationships** tab.

Maintaining Adoption Members & A/I Members Relationships

To add or edit relationships between **Adoption Members** and **A/I Members**, complete the following steps:

1. Select **Adoption Members and AI Members** from the **Member Status** drop-down menu.

The **Relationships Grid** appears.

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2. Click the **Relationship** drop-down arrow to select the appropriate relationship.

Note: The selected **Relationship** represents the individual's **Relationship To** the identified person.

3. Repeat **Step 2** as needed to add/edit additional **Relationships**.

4. Click the **Save** button.

Maintaining Adoption Details

To view the **Adoption Details** for each **Adoption Member**, complete the following steps:

1. Click the **Adoption Details** tab.

The **Adoption Details** tab appears.

The **Adoption Details** tab includes all (Active and Inactive) **Adoption Members**. The Adoption Members **Name** link is a hyperlink navigating to the **Person Profile**.

2. Click the **Birth Parents** link to record or view the child-specific putative father information.

| Adoption Members | A/I Members | Relationships | Adoption Details | Associated Persons |

Adoption Members

Name	Person ID	PC/PS Date		
Sacwis, Susie	123456	07/26/2021	Birth Parents	Medicaid Eligibility
Sacwis, Steve	121212		Birth Parents	Medicaid Eligibility

The **Birth Parents Information** screen appears.

Birth Parents Information

| Person Name: | Test, Mother | ID: | 13916773 | DOB: | 08/24/2015 |

Birth Mother

DOB: ⓐ	05/15/1991
Age at Child's Birth:	24
Mother is Deceased:	No
Deceased Date:	
Race:	American Indian, White
Mother Married at Child's Birth:	Yes

Birth Father

DOB: ⓐ	12/16/1991
Age at Child's Birth:	23
Father is Deceased:	No
Deceased Date:	
Race:	White

[Close]

3. When complete, click the **Close** button to return to the **Adoption Details** tab.

4. Click the **Medicaid Eligibility** link to view the child's Medicaid Eligibility record.

| Adoption Members | A/I Members | Relationships | Adoption Details | Associated Persons |

Adoption Members

Name	Person ID	PC/PS Date		
Sacwis, Susie	123456	07/26/2021	Birth Parents	Medicaid Eligibility
Sacwis, Steve	121212		Birth Parents	Medicaid Eligibility

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The **Child Selection** screen appears.

5. When complete, click the **Close** button to return to the **Adoption Details** tab.

6. Click the **Save** button.

Maintaining Associated Persons

To view the **Associated Persons** for the **Adoption Case**, complete the following steps:

1. Click the **Associated Persons** tab.

The **Associated Persons** tab appears.

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2. To add an Associated Person to this Adoption Case, click the **Add Associated Person** button.

The **Person Search Criteria** screen appears.

3. Enter search criteria into the appropriate fields OR enter the **Person ID**, if known.

4. Click the **Search** button.

5. If the desired person appears, click the **Select** link for that person in the **Person Search Results** section.

   - If you selected a person, skip to **Step 8**.

6. If no results are returned, click the **Create New Person** button to display the **Person Information** screen.

7. Enter data in the fields to create a **Person Profile** record and click the **Save** button.

The **Associated Persons Details** screen appears.

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8. Select the appropriate **Association** from the drop-down list. (Required)

9. Enter a **Description** for the association, if desired. (Optional)

10. The **Begin Date** field defaults to the current date. If needed, enter the appropriate **Begin Date** for this association.

11. Click the **OK** button.

The **Associated Persons** tab appears displaying a confirmation message and a row for the newly added Associated Person.

12. Click the **Save** button at the bottom of the **Associated Persons** tab.

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