

Maintaining Adoption Case Members Information



Knowledge Base Article

Maintaining Adoption Case Members Information

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Maintaining Adoption Case Members Information

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.

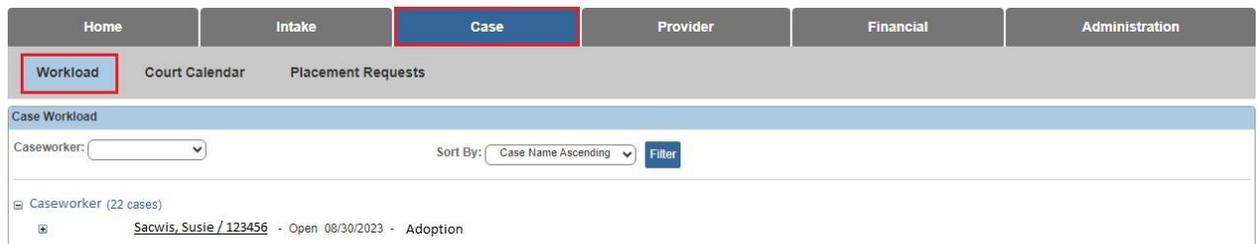
Maintaining Adoption Case Members Information

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 Case Members Information

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
<input checked="" type="radio"/>	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**.

Maintaining Adoption Case Members Information

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

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
<input checked="" type="radio"/>	123456	Sacwis, Susie	07/03/2009	14	Female	White	No	None	11/21/2022

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**.

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
<input type="radio"/> Inactivate	123456	Sacwis, Susie	07/03/2009	14	Female	White	No	None	11/21/2022

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).

Maintaining Adoption Case Members Information

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.

CRP	Person ID	Name	DOB	Age	Gender	Race	Hispanic/Latino	ICWA	Begin Date
123456		Sacwis, Susie	11/22/2010	12	Female	White	No		06/12/2018

CRP	Person ID	Name	DOB	Age	Gender	Race	Hispanic/Latino	ICWA	Begin Date	Deactivation Reason
111111		Test, Child	09/15/2008	15	Female	White	No		05/25/2021	N

8. Click the **Save** button.

Maintaining Adoption Case Members Information

Viewing A/I Members Details

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

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

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

A/I Members Details

Active A/I Members List

Intake ID	Person ID	Name	DOB	Age	Gender	Race	Hispanic/Latino	Begin Date
No Results Returned.								

Inactive A/I Members List

Intake ID	Person ID	Name	DOB	Age	Gender	Race	Hispanic/Latino	Inactive Date
No Results Returned.								

Apply Save Cancel

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**.

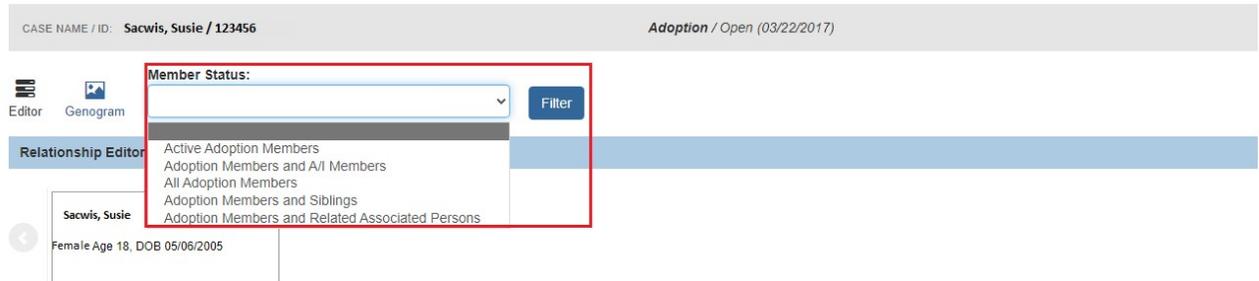
- The **Active A/I Members List** displays the **Person IDs** of individuals who are **Active A/I Members** in an **Intake** linked to the adoption case.
- The **Inactive A/I Members List** displays the **Person IDs** of individuals who are **A/I Members** in a **Completed Intake** that is linked to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

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.

Maintaining Adoption Case Members Information

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.

The screenshot shows the 'Relationship Editor' interface. At the top left, there are icons for 'Editor' and 'Genogram'. A 'Member Status:' dropdown menu is highlighted with a red box, showing 'Adoption Members and Siblings' selected and a 'Filter' button next to it. Below this is a blue bar with the text 'Relationship Editor' and a help icon. Underneath, another red box highlights the text 'Add other non-adoptive members as siblings:' followed by an 'Add Sibling' button. The main area displays two member cards: 'Sacwis, Susie / 123456' (Female Age 18, DOB 05/06/2005) and 'Sacwis, Steve / 121212' (Male Age 16, DOB 09/25/2007). Below the cards, a relationship dropdown is set to '1st Biological Sister' with a plus icon. To the right, there is a 'to' field with 'Sacwis, Steve / 121212' (Age 16, DOB 09/25/2007) and a 'Reciprocal:' checkbox. An 'Include in Sibling Group' checkbox is also present.

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

The **Person Search Criteria** screen appears.

Maintaining Adoption Case Members Information

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 Sort by:
Returns results matching entered names including AKA names/nicknames

+ 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.

Maintaining Adoption Case Members Information

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.

The screenshot shows a web application interface for creating a person profile. The form is organized into tabs: Basic, Demographics, Address, Additional, Characteristics, and Safety Hazard. The 'Person Information' section is active and contains the following fields:

- Prefix: (dropdown)
- First Name: * (text input, highlighted with a red box)
- Last Name: * (text input, highlighted with a red box)
- Middle Name: (text input)
- Suffix: (dropdown)
- Gender: (a) (dropdown)
- DOB: (a) (text input with calendar icon, highlighted with a red box)
- Hair Color: (dropdown)
- Sexual Orientation: (dropdown)
- SSN: (text input)
- Age: (text input)
- Eye Color: (dropdown)
- Deceased: (checkbox)
- Deceased Date: (text input with calendar icon)
- Age At Time Of Death: (text input)
- Driver's License #: (text input)
- Issue State: (dropdown)
- Expiration: (text input with calendar icon)

Additional features include a 'Populate AKA Name' button, radio buttons for 'Retain' and 'Add/Edit', and checkboxes for 'No SSN Exists', 'Estimated DOB', 'DOB Unknown', and 'Deceased Date Unknown'. Below the form is an 'AKA Names' table with columns for Prefix, First Name, Middle Name, Last Name, Suffix, and AKA Type. An 'Add AKA' button is located below the table. At the bottom of the form, there are 'Apply', 'Save', and 'Cancel' buttons, with the 'Save' button highlighted by a red box.

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.

Maintaining Adoption Case Members Information

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

The screenshot shows the 'Relationship Editor' interface. At the top, there is a blue header with the text 'Relationship Editor' and a small 'a' icon. Below the header, there is a section titled 'Add other non-adoptive members as siblings:' with a blue 'Add Sibling' button. The main area displays three member profiles in a row, each with a red border. The first profile is 'Sacwis, Susie', Age 18, DOB 05/06/2005, with 1 unspecified relationship. The second profile is 'Sacwis, Steve', Male Age 16, DOB 09/25/2007, with 1 unspecified relationship. The third profile is 'Sacwis, Susan', Female Age 14, DOB 07/03/2009, with 3 unspecified relationships. Below the profiles, there are two relationship selection rows. The first row shows 'Sacwis, Susie is the...' with a dropdown menu set to 'Biological Sister' and a plus sign, followed by 'to Sacwis, Steve' with 'Male Age 16, DOB 09/25/2007' and an unchecked 'Include in Sibling Group' checkbox. The second row shows 'Sacwis, Susie is the...' with a dropdown menu set to 'Biological Sister' and a plus sign, followed by 'to Sacwis, Susan' with 'Female Age 14, DOB 07/03/2009'. At the bottom, there is a dark grey bar with three buttons: 'Apply', 'Save', and 'Cancel'. The 'Save' button is highlighted with a red border.

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.

Maintaining Adoption Case Members Information

Member Status: Adoption Members and A/I Members Filter

Relationship Editor

Sacwis, Susie	Sacwis, Steve	Sacwis, Susan	Unknown - intake
Age 18, DOB 05/06/2005	Male Age 16, DOB 09/25/2007 1 unspecified relationship	Female Age 12, DOB 01/24/2011 1 unspecified relationship	Male 2 unspecified relationships
1 st Sacwis, Susie is the... Biological Sister	to Sacwis, Steve Male Age 16, DOB 09/25/2007 <input type="checkbox"/> Include in Sibling Group	to Sacwis, Susan Female Age 12, DOB 01/24/2011 <input type="checkbox"/> Include in Sibling Group	Unknown - intake Male <input type="checkbox"/> Include in Sibling Group
1 st Sacwis, Susie is the... Biological Sister	to Unknown - intake Male		

Apply Save Cancel

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.

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

Maintaining Adoption Case Members Information

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		Birth Father	
DOB: (a)	05/15/1991	DOB: (a)	12/16/1991
Age at Child's Birth:	24	Age at Child's Birth:	23
Mother is Deceased:	No	Father is Deceased:	No
Deceased Date:		Deceased Date:	
Race:	American Indian, White	Race:	White
Mother Married at Child's Birth:	Yes		

[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

Maintaining Adoption Case Members Information

The **Child Selection** screen appears.

Child Selection

Person ID: 123456 DOB: 08/24/2015

Person Name: Sacwis, Susie Title IV-E # / Medicaid Recipient ID: Child has private insurance

Personal Representative: Test County Children Services Board

Placement Provider Details

Provider ID: 111111 Provider Name:

Address: Test Address

Current Medicaid Card Mailing Details

Origin of Information: Provider Primary Address ⓘ

C/O Name: Test County Children Services Board Address:

Authorized Representative History

Filter: Active

Person ID	Name	Effective Date	End Date
<input type="button" value="Add Provider Members"/> <input type="button" value="Add Other Members"/>			

Non IV-E Eligible Indicators

Custody Start Date	Placement Begin Date	Placement State	U.S. Citizen
10/07/2020	01/27/2023	OH	Yes

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

6. Click the **Save** button.

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

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.

Maintaining Adoption Case Members Information

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

Active Associated Persons

Name	Gender	Address	Phone/Email	Association	Description	Begin Date
No Results Returned.						

Add Associated Person

Inactive Associated Persons

Name	Gender	Address	Phone/Email	Association	Description	Begin Date
No Results Returned.						

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

The **Person Search Criteria** screen appears.

- Enter search criteria into the appropriate fields OR enter the **Person ID**, if known.
- Click the **Search** button.
- 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**.

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

- If no results are returned, click the **Create New Person** button to display the **Person Information** screen.
- Enter data in the fields to create a **Person Profile** record and click the **Save** button.

The **Associated Persons Details** screen appears.

Maintaining Adoption Case Members Information

Associated Persons Details

Person ID: 222222
 Name: Test, Adult
 Address: Test Address
 Phone/Email:

Association: *
 Description:
 Begin Date: * 10/09/2023
 End Date:

Reason for Deactivation:

Spell Check Clear 250

Save Cancel

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.

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

Active Associated Persons

	Name	Gender	Address	Phone/Email	Association	Description	Begin Date	
edit	Test, Adult	Male	Test Address		Adult		10/09/2023	delete

Add Associated Person

Inactive Associated Persons

	Name	Gender	Address	Phone/Email	Association	Description	Begin Date
No Results Returned.							

Apply **Save** Cancel

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](#).