Linking Intakes to a Case

Knowledge Base Article

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Linking Intakes to a Case

Overview

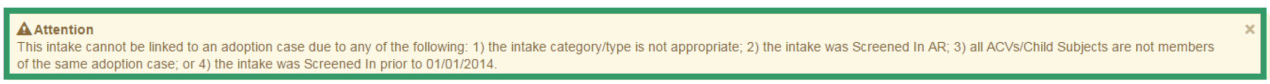
This Knowledge Base Article (KBA) describes how to link an **Intake** to a **Case**, including an open **Adoption Case**. It describes the functionality that (in some instances) allows users to select which **Intake Participants** to add as **Active Case Participants** when linking an **Intake**.

Based on **Intake Category** and the **Intake Type**, certain rules apply as described in this article when linking to an **Adoption Case**.

Viewing Intake Warning Messages

When a child who is a member of an Adoption Case is added to the Intake as an **Alleged Child Victim (ACV)/Child Subject of Report (CSR)**, warning messages will display on the Intake as a reminder when:

- The **Intake Type** and **Intake Category** selected cannot be linked to an Adoption Case.
- The ACVs/Child Subjects are not members of the same Adoption Case.



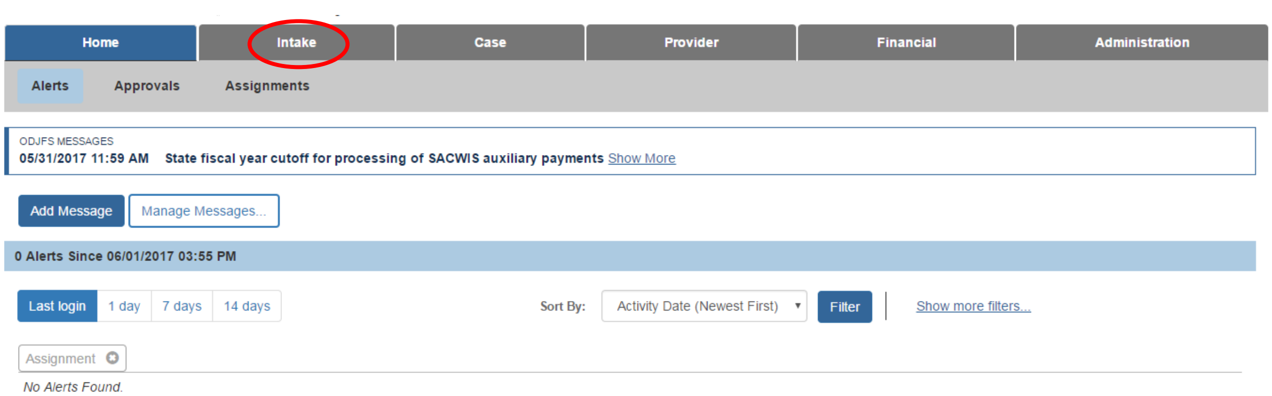
To resolve the warning message(s), take the following action, as applicable:

1. Correct the **Intake Type** and/or the **Intake Category**.
   and/or
2. Ensure that all **ACVs/CSRs** on the Intake are children in the same Adoption Case. If ACVs/CSRs are members of different Adoption cases, they will require separate Intakes.

Note: An Intake should *always* be linked to the ACV/CSR's case.

Linking an Intake to a Case

1. On the SACWIS **Home** screen, click the **Intake** tab.



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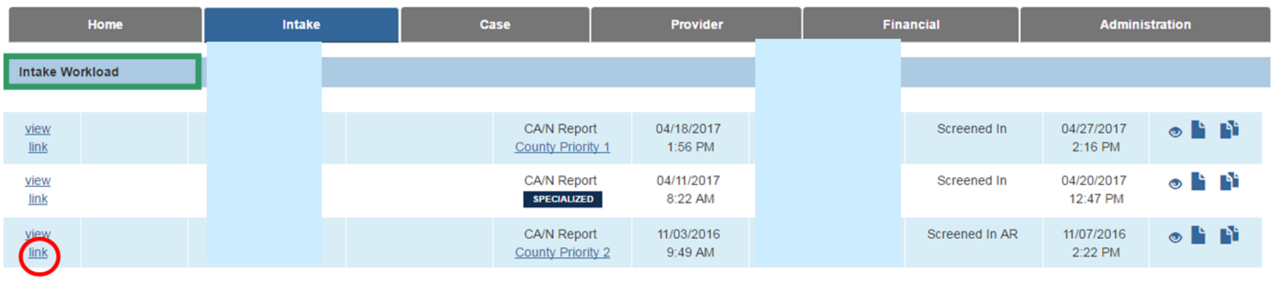
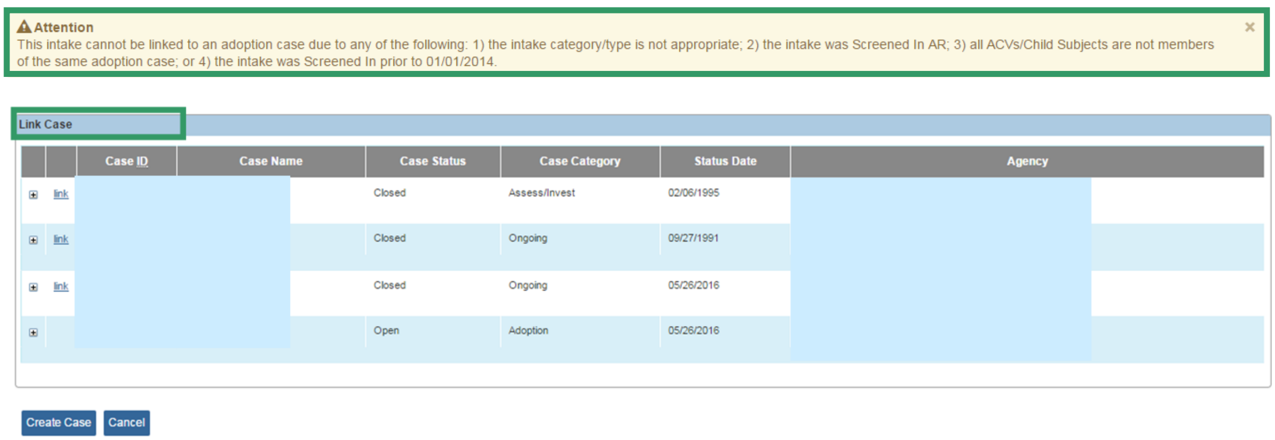
The **Intake Workload** screen appears.

2. Click the **link** hyperlink beside the Intake you wish to link to a case.



The **Link Case** screen appears.



The **Link Case** screen lists available cases to which the selected Intake ID can be linked, based on:

- Any existing cases in which one or more Intake Participants are Active or Historical members.

Exception: The **Warning Message** shown above will display when a particular Intake *cannot* be linked to the Adoption Case in which the Intake Participant(s) with a role of ACV/CSR or Child/Youth Subject of a Non-CA/N Report is a member.

Note: If the case is an Adoption Case AND the Intake Category/Intake Type is one of the combinations listed below, the **Link Case** screen displays a row for the case but does *not* display the link hyperlink for the case:

CA/N Report	Baby Doe/Disabled Infant
Dependency Report	Dependent Child
Family In Need of Services	One of the following: • Adoption Subsidy Only • Alt Response required Non Lead PCSA Contacts • Emancipated Youth • Home Evaluation/Visitation Assessment • ICAMA • ICPC • Permanent Surrender • Postnatal Placement Service to Infant of Incarcerated Mother • Post-Finalization Adoption Services • Preventative Services • Safe Haven/ Deserted Child • Unruly Delinquent

The Adoption Case row is *not* displayed on the **Link Case** screen when:

- The Adoption Case is closed.
- The Case Category is (Open or Closed) Adoption Subsidy Only.
- The Intake has a Screening Decision Date/Time that is prior to the Adoption Case Creation Date.
- The Adoption Case Member's role in the Intake is not Alleged Child Victim, Child Subject of Report, or Child/Youth Subject of a Non-CA/N Report.

Selecting from the Link Case Screen

From the **Link Case** screen, the user can:

- View the list of Active Case Members for a case to help determine the appropriate case to which to link the Intake
- Access the Case Overview to help determine the appropriate case to which to link the Intake
- Select a case to which to link the Intake
- Create a new Case, if appropriate, to link the Intake

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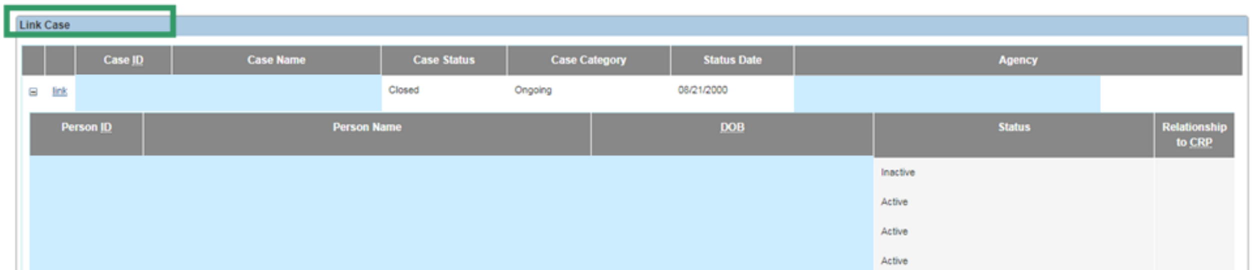
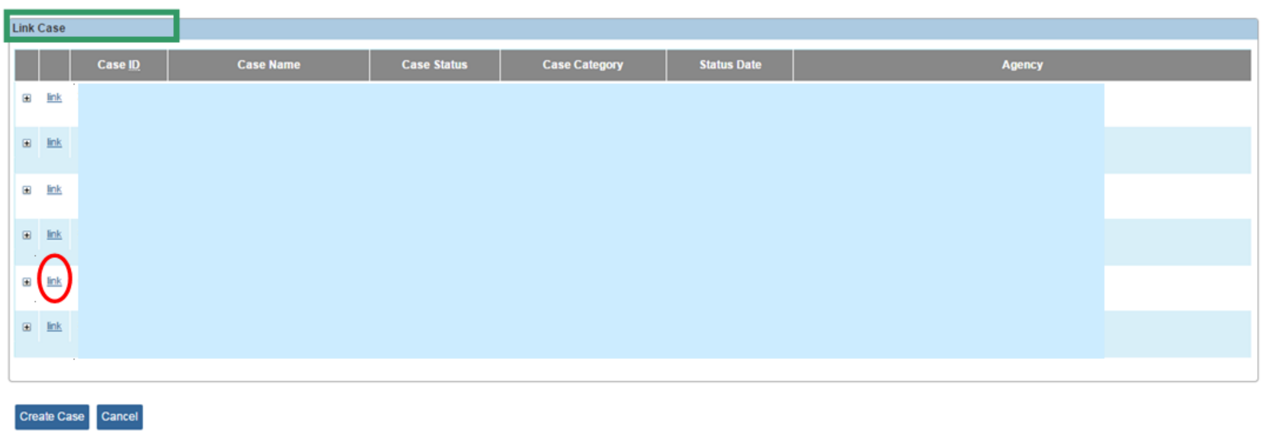
Note: You can click the **Plus Sign** next to the **Case ID** to view a list of Case Members (Active and Inactive).

The plus sign expands the entry and a list of **Case Members** appears.



Once you have determined one of the listed cases on the **Link Case** screen is the correct case to which the Intake should be linked:

1. Click the **link** hyperlink beside the **Case ID** number to which you are linking the Intake.



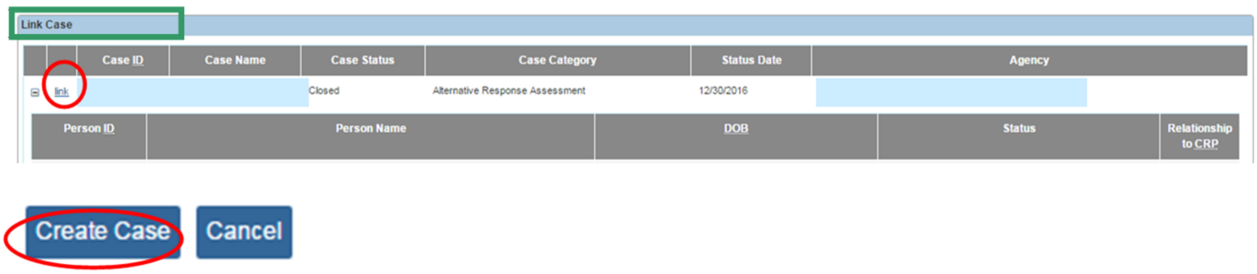
Note: The screen that appears will depend on the type of **Case** to which you are linking the Intake:

- The **Case Information** screen appears when linking to an existing *Non-Adoption* Case. *If the Case Information screen appears, refer to the **Linking an Intake to a Non-Adoption Case-The Case Information Screen View** section below*.

- The **Case Member Details** screen appears when linking to an Adoption Case. *If the Case Member Details screen appears, refer to the **Linking an Intake to an Adoption Case-The Case Members Details Screen View** section below*.

Note: If there are no cases listed (or none of the listed cases on the **Link Case** screen is the correct case), click, **Create Case**.

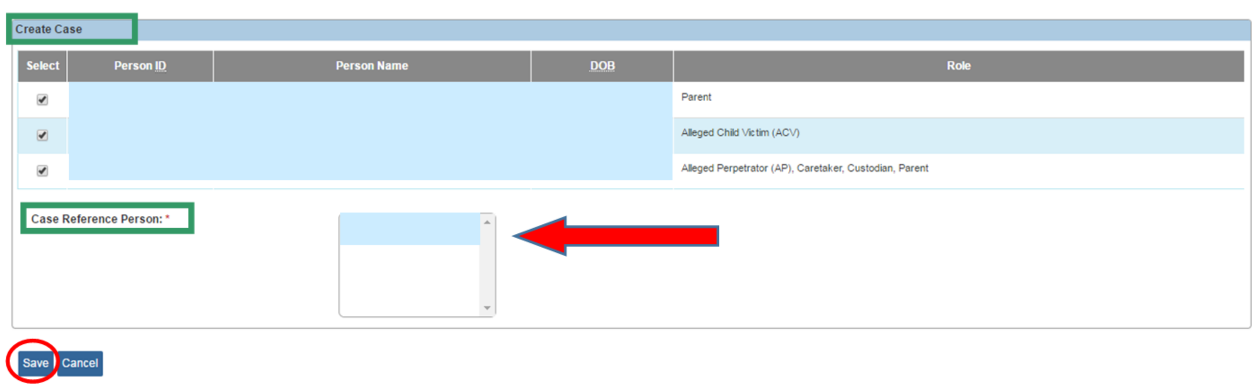
Creating a Case



The **Create Case** screen appears, displaying a list of Intake Participants who can be selected to become Case Members in the new case.

By default, each participant has a checkmark beside his or her name.

1. If any of the individuals listed should not be a Case Member, click the checkmark beside the appropriate **Person ID** to remove it from the checkbox. Removing the checkmark will prevent that particular person from being added to the case as a Case Member.
2. Click the name of the appropriate **Case Reference Person**.
3. Click, **Save**.



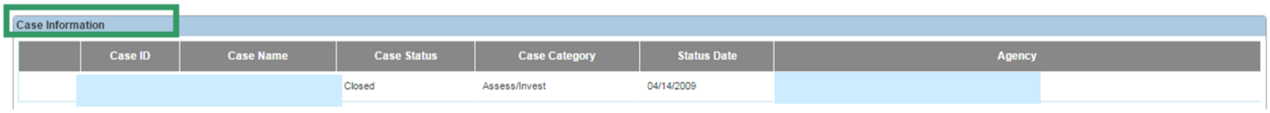
Linking an Intake to a Non-Adoption Case-The Case Information Screen View

Linking an Intake to a Non-Adoption Case, as stated above, will cause the **Case Information** screen to appear once you have selected the Case from the Link Case screen.

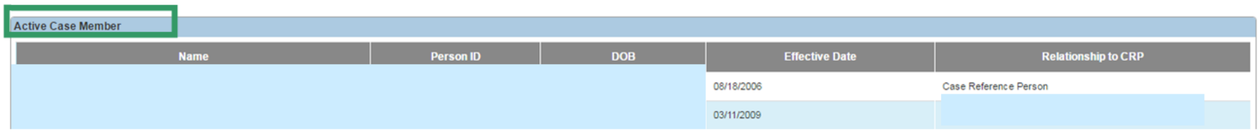
Linking Intakes to a Case

The **Case Information** screen is divided into four sections:

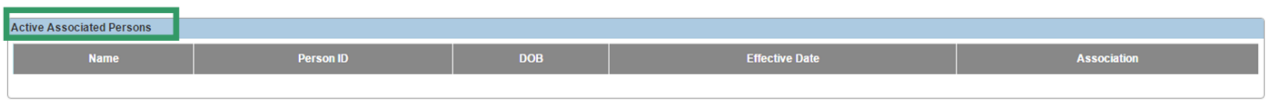
The **Case Information** section displays the basic case information such as the **Case Name**, **Case Status**, etc.



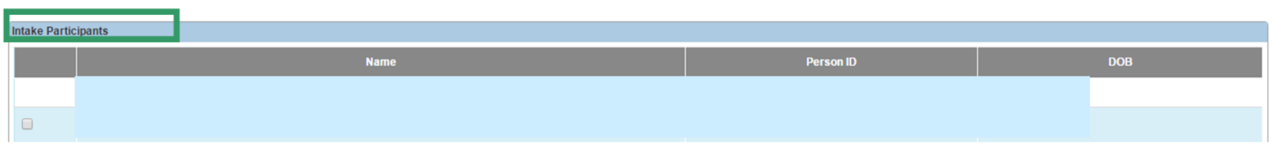
The **Active Case Member** section displays the current Active Case Members.



The **Active Associated Persons** section displays any Active Associated Persons on the selected case.



The **Intake Participants** section displays the Participants for the Intake that the user is linking to the selected case.



Selecting Intake Participants to Add to the Case

Note: Intake Participants who are *not* currently Active Members of the selected case, or not currently Active Associated Persons, will display with a checkbox and are available to be added as Case Members. This includes Inactive Case Members who may need to be reactivated.

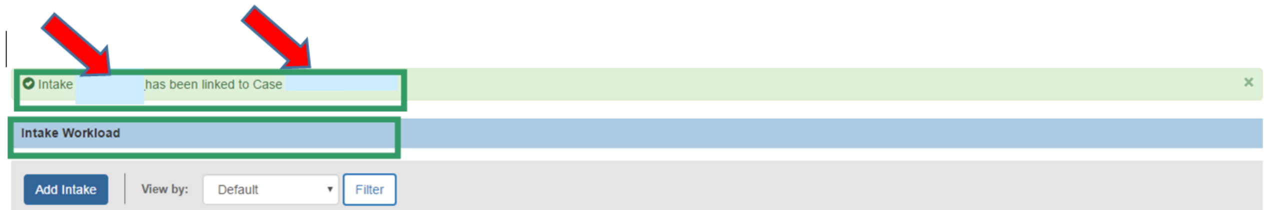
1. Select the available **Intake Participants**, if any, to add as Active Case Members by placing a checkmark(s) in the applicable checkbox(es).
2. Click, **Link to Existing Case**.

Important: If the Intake is subsequently *unlinked* from the case, any Case Members who were added to the case *will remain linked Case Members*. If the members should *not* be linked to the case, go to the Case Members screen and delete them *prior* to unlinking the intake.

Note: If you have determined that the intake should **NOT** be linked to this case, click the **Cancel** button to return to the **Link Case** screen and make a different selection.

The **Intake Workload** screen appears with a message confirming the Intake has been linked to the Case.

Note: The Intake number is a hyperlink to the Intake. The Case number is a hyperlink to the Case Overview screen.



Linking an Intake to an Adoption Case-The Case Member Details Screen View

Linking an Intake to an Adoption Case, as stated above, will cause the **Case Member Details** screen to appear once you have selected the Case from the Link Case screen.

The Case Member Details Screen

The Case Member Details section displays basic case information including the **Case Name** and **Case Status**. It is divided into three sections.

Case Member Details

	Case ID	Case Name	Case Status	Case Category	Status Date	Agency
			Open	Adoption		

The **Adoption Members** section lists the current active Adoption Case Members.

Adoption Members

Name	Person ID	DOB	Begin Date
			05/26/2016

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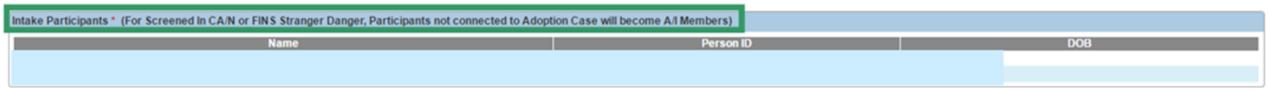
The **Intake Participants** section lists the Participants for the Intake the user is linking to the selected case.

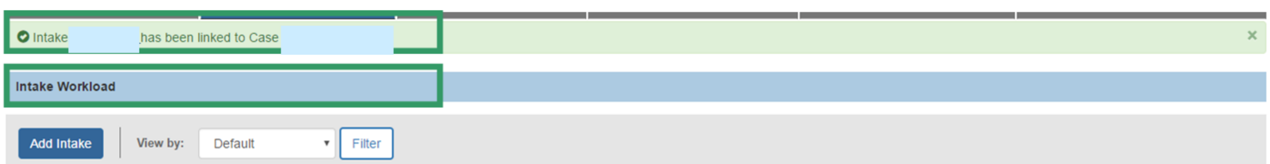


Note: When linking an Intake to an Adoption Case, the Intake Participants cannot be selected. Any Intake Participants, who are not already Adoption Case Members, automatically become A/I Members in the Adoption Case (if the Intake is a Screened In CA/N or FINS/Stranger Danger) so they may be linked to the applicable CAPMIS tools. For all other Intakes, no A/I Members will be created.

1. Click, **Link to Existing Case**.

Important: If it is determined that the Intake should *not* be linked to the case, click the **Cancel** button to return to the **Link Case** screen and select a different case.

The **Intake Workload** screen displays a message confirming the Intake has been linked to the case.



If you need additional information or assistance, please contact the SACWIS Help Desk.