

# **Navigating Ohio SACWIS for OhioKAN Users**



**Knowledge Base Article**

# Navigating Ohio SACWIS for OhioKAN

Overview .....	3
Ohio SACWIS Home .....	3
Navigating in Ohio SACWIS .....	4
Header and Footer .....	5
The Home Screen .....	5
Primary Tabs .....	6
Secondary Tabs and Tertiary Navigation .....	6
Opening Records .....	8
List Screens .....	9
Detail Screens .....	10
Required Fields .....	11
Narrative Fields .....	11
Adding .....	11
Deleting .....	12
Apply, Save, Cancel, Close .....	12
ID Numbers .....	13

# Navigating Ohio SACWIS for OhioKAN

## Overview

This article provides an overview of how to utilize Ohio SACWIS as an OhioKAN user.

## Ohio SACWIS Home

The screenshot shows the Ohio SACWIS Home interface. At the top left is the Ohio SACWIS logo. To its right, the user is identified as 'Navigator 14, OhioKAN' with a 'Log off' link. Below this, it says 'OhioKAN' and 'Training\_Prod1 / 4.07.1' with a last login time of '08/05/2020 01:31:46 PM'. On the top right, there are four navigation buttons: 'Home', 'Recent', 'Search', and 'Help'. Below these is a horizontal menu with tabs for 'Home', 'Intake', 'Case', 'Provider', 'Financial', and 'Administration'. Under the 'Home' tab, there are sub-tabs for 'Alerts', 'Action Items', 'Approvals', and 'Assignments'. The main content area shows 'No Broadcast messages at this time.' followed by a blue bar indicating '0 Alerts Since 08/05/2020 01:31 PM'. Below this, there are filters for 'Last login' (1 day, 7 days, 14 days) and 'Sort By' (Activity Date (Newest First)). A 'Filter' button and a link to 'Show more filters...' are also present. At the bottom, it says 'No Alerts Found.'

This is the screen that displays when you first login to Ohio SACWIS; when you select the **Home** tab; and by clicking on the Home button in the header, and selecting the Home link. This screen is often referred in online help topics as one of the first steps you can take when navigating to a specific record, process, and work task.

This screen displays broadcast messages added by the state and/or your agency. It also displays Alerts that are actions taken on specific work items/records.

The Home screen is one of the primary screens you will use when managing staff and work action items for yourself and/or your team.

Besides Broadcast Messages and Alerts; from the Home screen, the subheading displays additional tabs to view and manage Action Items, Approvals, and Assignments.

You will navigate from this screen to functional areas (Intake, Case, Provider, Financial or Administration); use the Recent button to go directly to a recently accessed record; select the Search button to search for a specific person, intake, case, provider, employee and agency; and use the Help button to reference online help assistance.

# Navigating Ohio SACWIS for OhioKAN

## Getting Around in Ohio SACWIS

You navigate Ohio SACWIS in a way that's similar to Web-based, online forms. The application appears in a Web browser, most likely Chrome or Internet Explorer. The forms in the application contain many of the field and navigation features you see in PC or Web-based applications.

### Note

**DO NOT** open more than one instance of Ohio SACWIS at a time. Working between two instances will corrupt information in the Ohio SACWIS database. Do all your work in one instance. (If you want to copy narratives from one record to another, copy the text and paste it in a Word or text file. Then copy it from the Word or text file and paste it into the new location.)

## Navigating in Ohio SACWIS

Your browser's navigation bar appears above the Ohio SACWIS menu. Remember, the tools in your browser are used for navigating the Internet or an Intranet. These tools **do not** control the functions within Ohio SACWIS, so you must not use them while you're in the system.

### Note

**DO NOT** use the **Back** and **Forward** buttons in your browser's navigation bar. Use only the buttons and links within the application screen to move from one screen to another. Use only the **log off** link to close Ohio SACWIS, not the X in your web browser window.

To navigate in Ohio SACWIS, you will click the buttons, or select from the links provided on the screen. To get out of a record, or off of a screen you will select from the buttons. You must use these as alternatives to the **Back** arrow, or button:

- Click the **Apply** button. This applies the data entered to the record, takes you to the top of the screen within the record so you can continue in the process task.
- Click the **Save** button. This saves the data entered to the record, and takes you out of the record.
- Click the **Cancel** button and click **OK** in the dialog box. This returns you to the previous screen, or the filter/list screen without changing any data.
- Click the **Close** button. The returns you to the previous screen.

(See [Apply](#), [Save](#), [Cancel](#), [Close](#).)

You might find it easier to hide the browser navigation bar while you work in Ohio SACWIS. Press **F11** on your keyboard or try one of the following:

Internet Explorer	Right-click on the tool bar, then left-click on Standard Buttons
Chrome	In the top-right corner of the window, click on the ellipsis (three-dot) icon, locate the Zoom section of the drop down menu, and select the square icon to the far

## Navigating Ohio SACWIS for OhioKAN

	right.
Firefox	Select ViewgToolbarsgNavigation Toolbar
	Repeat the action above to restore the navigation buttons.

### Header and Footer

Regardless of where you are in Ohio SACWIS, certain buttons and links always appear at the top and bottom of the screen. These are the header and footer links and buttons. The header in Ohio SACWIS displays the logged in user name, the environment, the agency, and a **Log Off** link. The header also displays buttons. Each button has links that navigate to specific areas within the button selected.

#### Header:



Wood, Eden / UAT / [Log off](#)  
Public County Job & Family Services



If you are entering information on a screen, and want the information saved to the record, be sure to click the save button before clicking on the options in the header, footer, or another primary tab, or navigation link.

### The Home Screen

When you first login, you arrive at the **Home** tab, or **Home** screen. You can also return to this screen from any screen by clicking the **Home** tab or header button. The **Home** screen allows you to view and add broadcast messages; and navigate to task Alerts. Alerts are links to tasks taken on a work item assigned to you regardless of who performed the task.

The Home screen displays four secondary tabs:



- **Alerts.** Displays both broadcast messages either added by the state or by your agency; and Alerts. Alerts are specific tasks taken on your work items either by you or another worker. The number of alerts display based on last login, 1 day, 7 days, and 14 days by selecting the heading for each.
- **Action Items.** Action Items take the place of the Tickler system. Action Items are system generated based on assignment. You can view Action Items from the Home screen, Action Items subheading, and from the case, or provider record's Overview screen for which the action item needs completed. Each Action Item displays a tag that identifies whether the action needing taken is within the time required to complete the action; close to being past due, or past due.

## Navigating Ohio SACWIS for OhioKAN

- **Approvals.** Work processes that require approval will display at the end of each process that needs routed and/or supervisor approval. Once the process is completed and validated by the worker, if you are the person to whom it is routed, it will display as a link within this tab. Once you select the link, you review the details recorded. The **Process for Approval** button will allow the supervisor to route the record back to the worker and/or final approve the record.
- **Assignments.** Displays work assignments assigned to you. If you have supervisory duties, the assignments tab also displays a drop down list to select from the workers assigned to you; and a show button to view the assignments for the worker selected. As a supervisor; the Assignments link allows you to select each team member to view their assignments; assign tasks, end assignments, and assign items by geographical designation.

### Primary Tabs

The other tabs in the main row reflect the five primary functional areas in Ohio SACWIS. The tabs you see depend on the parts of the Ohio SACWIS to which you have access.

Home	Intake	Case	Provider	Financial	Administration
------	--------	------	----------	-----------	----------------

- **Intake.** For recording and screening intakes. All cases in Ohio SACWIS are created from intakes.
- **Case.** For recording case activities, family specific work items, case services, and so on.
- **Provider.** For maintaining information about resource providers, like names, addresses, staff members, home studies, certifications, service credentials, and so on.
- **Financial.** For managing fiscal activities, like service authorizations, rates and ceilings, provider rosters, payment processing, eligibility determinations, and so on.
- **Administration.** For maintaining staff information, requesting standard reports, and performing certain utilities. Also for system maintenance functions, like broadcast messages, tickler templates, lookup values, user groups, security profiles, and so on.

Your job probably requires you to work mostly in only one of these areas. Simply click on a tab to enter the area(s) to which you are assigned.

### Secondary Tabs and Tertiary Navigation

When you click on one of the primary tabs, a secondary row of tabs appears just below the row of primary tabs. There is only one secondary tab under Intake, but the other areas have several secondary tabs. These open up main areas of work within the functional area. On many secondary tabs, a tertiary menu of links appears in a blue box on the left side of the screen. This blue box is referred to often as "the navigation bar on



# Navigating Ohio SACWIS for OhioKAN

the left." It is also sometimes called the "left-hand navigation." This menu allows you to work on specific kinds of records within the work area identified by the secondary tab. In the screen shot below, the **Primary Tab** of Financial is selected, the **Secondary Tab** of Services is selected, and the **Tertiary menu** option of Maintain Services is selected.

The screenshot shows the Ohio SACWIS interface. At the top, there is a navigation bar with tabs: Home, Intake, Case, Provider, Financial (selected), and Administration. Below this, a secondary navigation bar contains: Workload, Services (selected), Eligibility, Payment, Benefits, and Statistical & Expenditure Reports. A left-hand navigation menu is visible, with 'Maintain Service' selected. The main content area displays the 'Agency Services Search Criteria' form with the following fields:

- Agency: Public County Job & Family Services
- Agency Number: 1234
- Service Category: [Dropdown]
- Service Type: [Dropdown]
- Sort Result By: Mapping Default

A 'Search' button is located below the form.

# Navigating Ohio SACWIS for OhioKAN

## Opening Records

If you work in Case, or Provider, you see a **Workload** tab. This tab lists the open records for cases, and providers assigned to you. When you open a case or provider record from the Workload, you reach the **Case Overview** or **Provider Overview** screen, which is a summary screen for a given record. The tertiary menu on the left, (referred to as, "the navigation bar on the left", or "left hand navigation") also appears on the overview screen. Each item in the left-hand navigation on an **Overview** screen displays links to additional records that are associated with the case or provider record you selected.

Summit01, User / [Log off](#)  
Summit County Children Services  
GoldTrain1 / 4.07.1 / Last Login: 04/28/2020 01:41:34 PM

Home Recent Search Help

Home Intake **Case** Provider Financial Administration

Workload Court Calendar Placement Requests

< >

**Case Overview**

- Activity Log
- Attorney Communication
- Intake List
- Safety Assessment
- Substance Abuse Screening
- Forms/Notices
- AR Pathway Switch
- Safety Plan
- Family Assessment
- Ongoing Case All
- Specialized AI Tool
- Law Enforcement
- Justification/Waiver
- Case Services
- Legal Actions
- Legal Custody/Status
- Living Arrangement
- Initial Removal
- Placement Request

CASE NAME / ID: **Grimes19, Mary / 2734021** Assess/Invest Open (02/10/2015)

ADDRESS: CONTACT:

AGENCY: Summit County Children Services

PRIMARY WORKER: Summit19, User SUPERVISOR(S): Summit01, User

Assign Worker

**Case Actions**

[View Case Information](#) | [0 Linked Cases](#) | [Program Categories](#) | [Case Status History](#)

One or more active case member(s) is missing demographic information: race, ethnicity, gender, DOB

Action Items Case Alerts Dashboard Assignments / Eligibility

Result(s) 1 to 3 of 3 / Page 1 of 1

When you click a link in the navigation bar on the left, the system displays a filter criteria, or list screen. All of the records that have been created of the type you select appear on the screen, usually listed in a table format. In many cases, above the table you can enter search criteria and filter options. From the filter criteria, or list screen, if the record does not exist, you may see drop down lists, and/or an **Add** button. You will only select the add button when you want to add a new record. If the record exists in the area in which you are working, an **Edit** or **View** link will allow you to open the record. You will not click the add button to add information to, or to edit an existing record. When you add or edit an item in the record or table, you open a detail screen, which displays the details of the record. Information is added to the Ohio SACWIS database from the detail screens.

# Navigating Ohio SACWIS for OhioKAN

## List Screens and Detail Screens

### List Screens

List, or filter, screens appear often in the system. For example, this type of screen displays when you select one of the links in the navigation bar on the left of an overview screen.

The system presents the records according to pre-defined default criteria, which may display more records than you want to view. You use the fields in the Filter Criteria area and click the **Filter** button to limit the display of records. The top portion of a list screen includes a **Filter Criteria** area, which allows you to filter the display of records that appear in the table below.

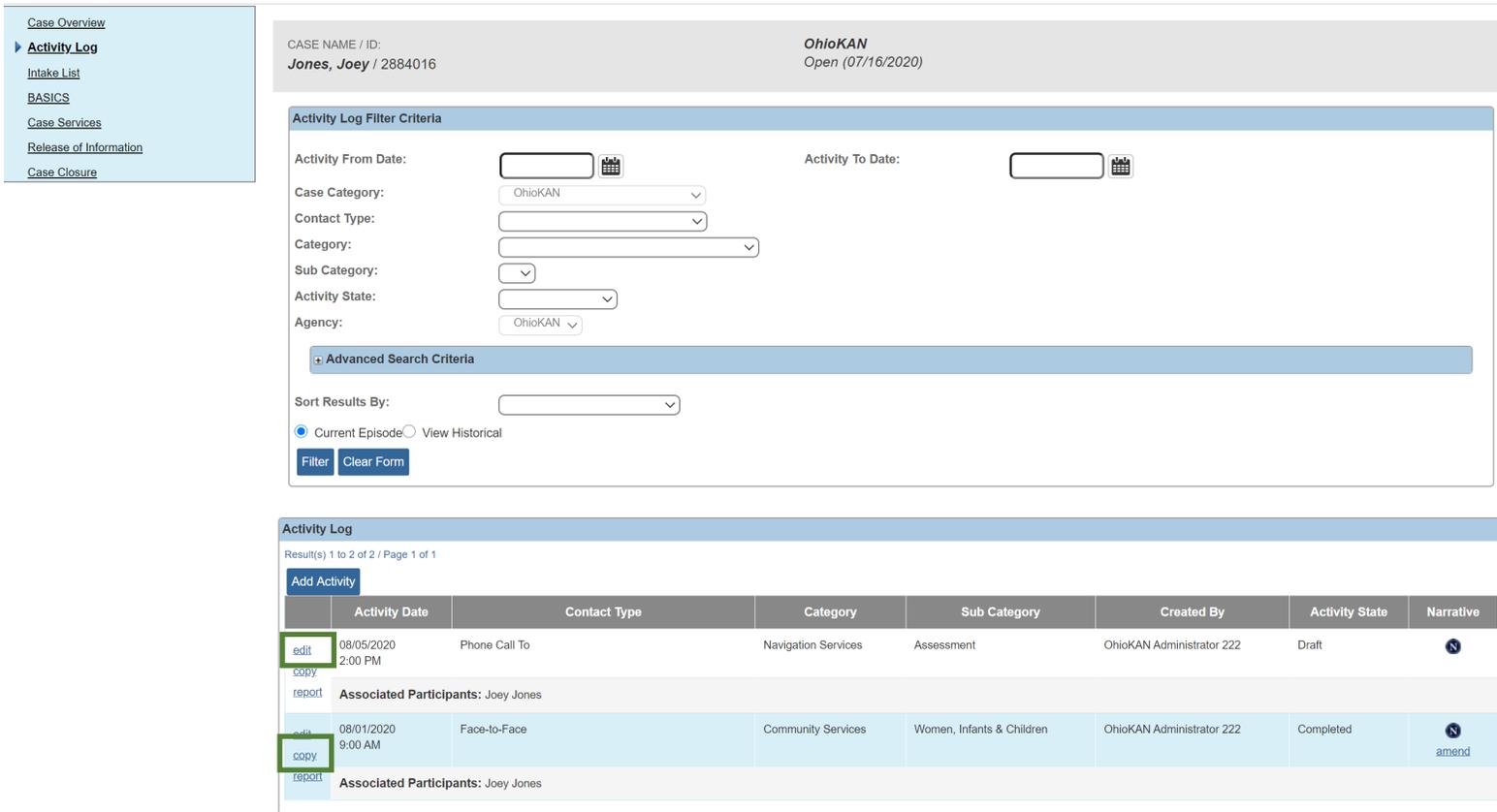
The screenshot displays the OhioKAN system interface. At the top, there is a navigation bar with tabs for Home, Intake, Case (selected), Provider, Financial, and Administration. Below this is a Workload section. On the left, a sidebar menu lists various options: Case Overview, Activity Log (selected), Intake List, BASICS, Case Services, Release of Information, and Case Closure. The main content area shows the details for a case named 'Jones, Joey / 2884016', which is 'OhioKAN' and 'Open (07/16/2020)'. Below this is the 'Activity Log Filter Criteria' form, which includes fields for Activity From Date, Activity To Date, Case Category (set to OhioKAN), Contact Type, Category, Sub Category, Activity State, and Agency (set to OhioKAN). There is also an 'Advanced Search Criteria' section and a 'Sort Results By' dropdown. At the bottom of the form are radio buttons for 'Current Episode' (selected) and 'View Historical', along with 'Filter' and 'Clear Form' buttons.

Each row in this table represents a single record. The number of records may exceed what can be displayed on one screen. In this situation, the results at the top of the list table will display the number of records on the screen, and the total number of records. Next to this information, the system will tell you the page number you are on and of how many pages exist. At the bottom of the list table, you will see page numbers, with the page you are on highlighted.

The records will display links allowing you to take specific actions. A **View** link allows you to view the record in read only. An **Edit** link will display when you can edit, or add information to a record before it is final approved. A **Copy** link allows you to copy a record, and edit the contents to help reduce recording redundancy. A **Report** link appears to run a report on the single record. These links appear in the left-most column of each record.

# Navigating Ohio SACWIS for OhioKAN

In the right-most column you may see **Delete** or **Amend** links, depending on the record. You will also see icons that represent  report,  copy, and  or  view the record's narrative.



**Activity Log Filter Criteria**

Activity From Date:   Activity To Date:  

Case Category:

Contact Type:

Category:

Sub Category:

Activity State:

Agency:

**Advanced Search Criteria**

Sort Results By:

Current Episode  View Historical

**Activity Log**

Result(s) 1 to 2 of 2 / Page 1 of 1

	Activity Date	Contact Type	Category	Sub Category	Created By	Activity State	Narrative
<input type="button" value="edit"/>	08/05/2020 2:00 PM	Phone Call To	Navigation Services	Assessment	OhioKAN Administrator 222	Draft	
<input type="button" value="report"/>	Associated Participants: Joey Jones						
<input type="button" value="edit"/>	08/01/2020 9:00 AM	Face-to-Face	Community Services	Women, Infants & Children	OhioKAN Administrator 222	Completed	
<input type="button" value="copy"/>							
<input type="button" value="report"/>	Associated Participants: Joey Jones						

To add a new record, click the **Add** button. To run a report on the process in which you are working, a **Report** button may appear below the list of records (if available on that screen). By selecting the view, edit, copy or add link, the system displays a detail screen. (Sometimes you can also delete records from a list screen. See [Adding and deleting records.](#))

## Detail Screens

A **Detail** screen allows you to view or add the details of a specific record. When you add a new record, the **Detail** screen does not contain any data. To complete the record, you enter details in the fields on the screen and click the **Save** or **Apply** button to save these details to the Ohio SACWIS database. The system ensures that you complete each record correctly. (See [Required and narrative fields.](#)) If you do not want to save changes, you click the **Cancel** button to navigate away from the screen. You click **Close** to close a read-only screen.

Remember, the system generally displays a list screen for filtering records before it displays a detail screen for entering data on a record.

# Navigating Ohio SACWIS for OhioKAN

## Required and Narrative Fields

A field is the element of a detail screen that either displays information from the database or allows you to enter information into the database. You complete fields in the same way you do on any online form.

### Required Fields

The system ensures that you enter the information it requires for accurately processing information.

- **Fields required to create a new record.** The system requires you to complete certain fields in order to begin the record and save it to the database. The labels for these required fields may appear in bold type and have an asterisk (\*).
- **Conditionally required fields.** The system may require that information be added to either one field or another. Or it may require that information be added to one field if another field is completed. In these situations, the field labels are not in bold type. However, the system displays an error message if a conditionally required field is left blank.
- **Fields required for approval.** Larger records must be fully complete before a supervisor or reviewer can approve them. For these, the system generally displays a **Validate for Approval** button, which allows you to instruct the system to check that all the required information has been entered. The system then displays a listing of any missing information.

### Narrative Fields

Many screens in Ohio SACWIS include narrative fields, large text boxes in which you write free-form descriptions or explanations. The amount of text you can enter in these fields varies from screen to screen. Some **Narrative** fields display a number (usually below the field in a small box) that shows how many characters can still be typed into the field. For example, 4,000 characters (including spaces) is about 700 words and 200 characters is about 30 words.

Narrative fields appear with a  button, which allows you to run the spell checking program on the text you entered.

## Adding and Deleting Records

### Adding

Records in Ohio SACWIS are added from within the functional areas. For example, new intake records are added from the **Intake** tab. Case records are added from the intake linking process. Person records are added from the intake, case, or provider records with which they are associated. New providers are added on the **Provider** tab, either through the provider inquiry process (ODJFS providers) or from the provider directory (non-ODJFS providers).

## Navigating Ohio SACWIS for OhioKAN

### Note

The system always requires you to conduct a search before you add a new person or provider record, to prevent the accidental duplication of records in the system. If you discover duplicate records, contact your supervisor. Designated workers are able to merge duplicate records.

**Important:** It is critical to perform a comprehensive person search and be certain that the individual does not already exist in Ohio SACWIS before proceeding to creating a new person record. If it's known the family has been involved with a PCSA previously, it is likely they already have a person record in Ohio SACWIS and it's imperative to use the same person ID already created for them. Failing to utilize an existing match in Ohio SACWIS will create unnecessary duplicates in the system.

### Deleting

If a record can be deleted, a **Delete** icon appears in the right-most column of the table that lists the record. This includes the tables that appear on list screens or on detail screens. In general, a record can be deleted until the final approval is saved. That is, the status of the record is "Draft," "In Progress," "Pending," depending on the type of record. An intake can never be deleted.

Often you are associating one record with another, in which instance you are deleting only the association. For example, you have associated the person profile of a case member with a case by "adding" the person to case. When you delete the case member, you are not deleting the person profile record, only the association between that person and the case.

## Apply, Save, Cancel, Close

The detail screens in Ohio SACWIS allow you view or update information that's in the Ohio SACWIS database. You launch a detail screen by opening a record from a list screen or from another detail screen. Detail screens include command buttons that control how information is saved:



- Click **Apply** to save your changes and stay on the current screen.
- Click **Save** or **OK** to save your changes and return to the originating screen.
- Click **Cancel**, then **OK** to the confirmation message, to return to the originating screen without saving any changes.
- Click **Close** on a read-only screen to return to the originating screen.

### Note

As you move through tabs on a screen, be sure to routinely click **Save** or **Apply** to ensure that your work is saved.

# Navigating Ohio SACWIS for OhioKAN

## ID Numbers

Ohio SACWIS manages primary entities like intakes, cases, person profiles, and provider records according to an identification (ID) number. The system associates various records with each other by these ID numbers. For example, participants and case members are associated with intakes and cases by their Person IDs. And intakes and cases are associated with each other by their IDs.

The system assigns ID numbers as follows:

- An Intake ID is assigned when you first click **Save** or **Apply** on the **Basic Information** screen. To save the record, you must enter at least the date and time received and the intake method. The system defaults to the current date, time, and phone for the intake method, but this can be changed by the worker.
- A Person ID is assigned when you first click **Save** or **Apply** on the **Person Information** or **Participant Details** screen. To save the record, you must enter at least the person's first and last names, click the **Unknown** check box for an intake participant, or click the **Create New Person** button.

**Important:** It is critical to perform a comprehensive person search and be certain that the individual does not already exist in Ohio SACWIS before proceeding to creating a new person record. If it's known the family has been involved with a PCSA previously, it is likely they already have a person record in Ohio SACWIS and it's imperative to use the same person ID already created for them. Failing to utilize an existing match in Ohio SACWIS will create unnecessary duplicates in the system.

- A new Person ID is assigned to an adopted child when a supervisor approves the request to secure the child's record.
- A Case ID is assigned when you first click **Save** on the **Create Case** screen, which appears when you link the new case to an intake record. To save the case, you must select at least one participant and identify a case reference person (CRP).
- A Provider ID is assigned to a non-ODJFS provider when you first click **Save** or **Apply** on the **Basic Provider Information** screen. To save the Provider Record, you must enter at least the provider's first and last names, the provider type, the provider's address, and contact information. (Note: This content will no longer apply on a future Ohio SACWIS build.)
- A Provider ID is assigned to a Home provider when the application is received and a new provider is created. To indicate this, select **Screen In - Application Received** in the **Decision** field, and then click **Save** on the **Decision** screen of the Inquiry record. The user then accesses the **Completed Inquiries** tab. The user will then select **Link** and either link the inquiry to an existing Provider Record or create a new one.

## Navigating Ohio SACWIS for OhioKAN

- An employee ID is assigned to an employee in Ohio SACWIS when a user selects **Create a New Employee** from the **Maintain Staff** screen, a Person ID is linked to the employee record, a hire date is entered, and the record is saved.

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at [SACWIS\\_HELP\\_DESK@jfs.ohio.gov](mailto:SACWIS_HELP_DESK@jfs.ohio.gov) .