

Creating and Linking an OhioKAN Intake



Knowledge Base Article

Creating and Linking an OhioKAN Intake

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Creating and Linking an OhioKAN Intake

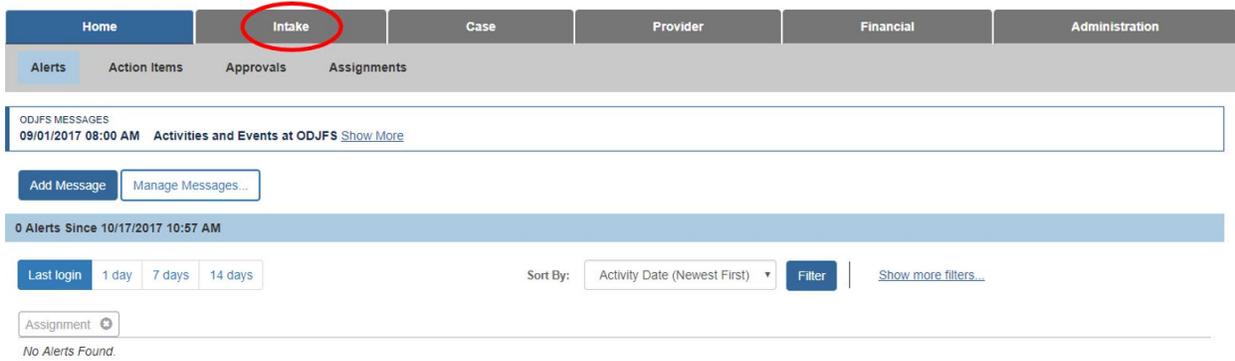
Overview

This article describes the steps for recording an OhioKAN Intake and linking it to a Case. An Intake documents a request or referral for OhioKAN services and is the first step to opening a Case.

Creating an OhioKAN Intake

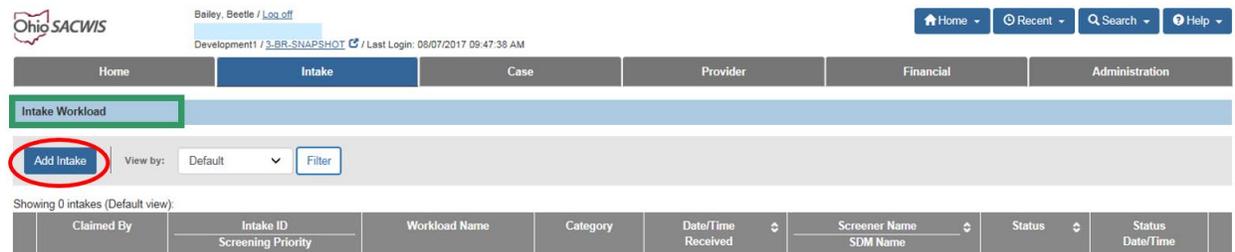
From the Ohio SACWIS Home Screen:

1. Click the **Intake** tab.



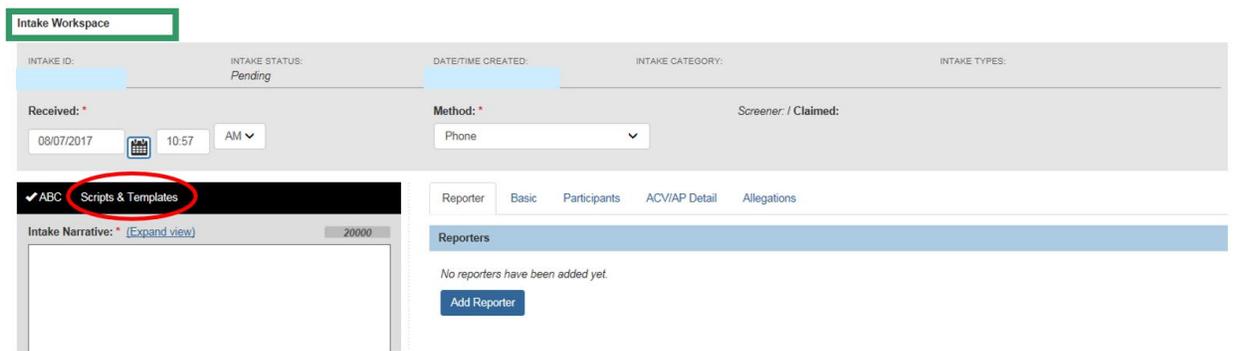
The **Intake Workload** screen appears.

2. Click **Add Intake**.



The **Intake Workspace** screen appears.

3. Click **Scripts & Templates**.



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The **Select template option** page appears, with OhioKAN selected.

4. Click the **OhioKAN** link.

Select template option: OhioKAN ▾

OhioKAN

Select All Copy Selected to Narrative

[OhioKAN](#) ▾

The link expands to show a list of guiding questions for the narrative related to OhioKAN. You can copy the questions into the narrative field, if desired, following the steps below.

Note: The narrative field is where the details about the referral/request for services should be documented. The narrative remains fully editable while the Intake is in pending status.

5. Select a specific question(s) by placing a checkmark(s) in the checkbox(es) beside the question(s).
6. Click, **Copy Selected to Narrative**.

OhioKAN

Select All Copy Selected to Narrative

[OhioKAN](#) ▾

What are the primary concerns leading the caller to contact OhioKAN?

Is the identified child:

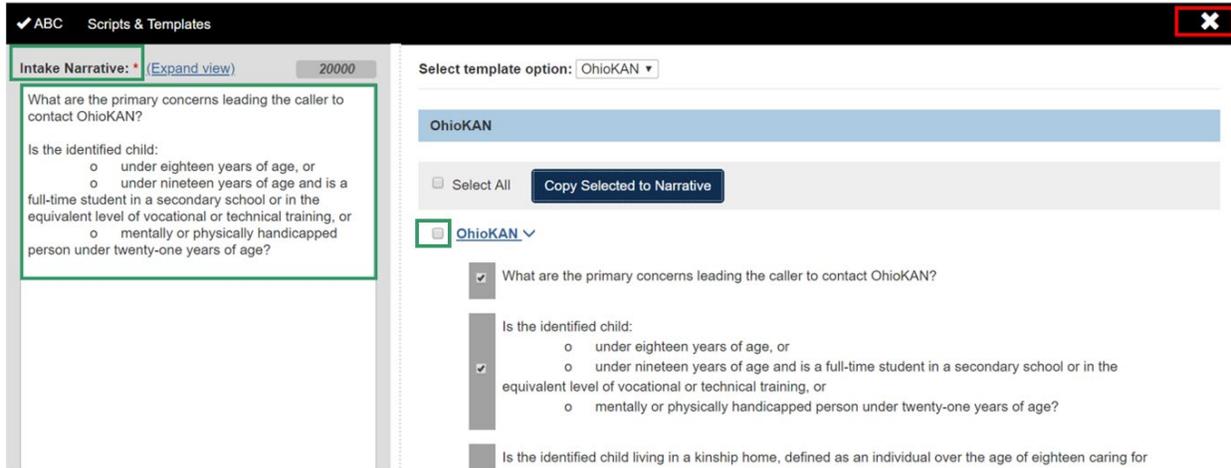
- under eighteen years of age, or
- under nineteen years of age and is a full-time student in a secondary school or in the equivalent level of vocational or technical training, or
- mentally or physically handicapped person under twenty-one years of age?

The questions you selected appear in the **Intake Narrative** grid.

Note: If you place a checkmark in the checkbox beside OhioKAN, the entire list of questions will be placed in the Intake Narrative field.

7. Click the “x” on the right side of the section header to exit the scripts/templates section to return to the tab view.

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The **Intake Workspace** screen appears with the tabbed view.

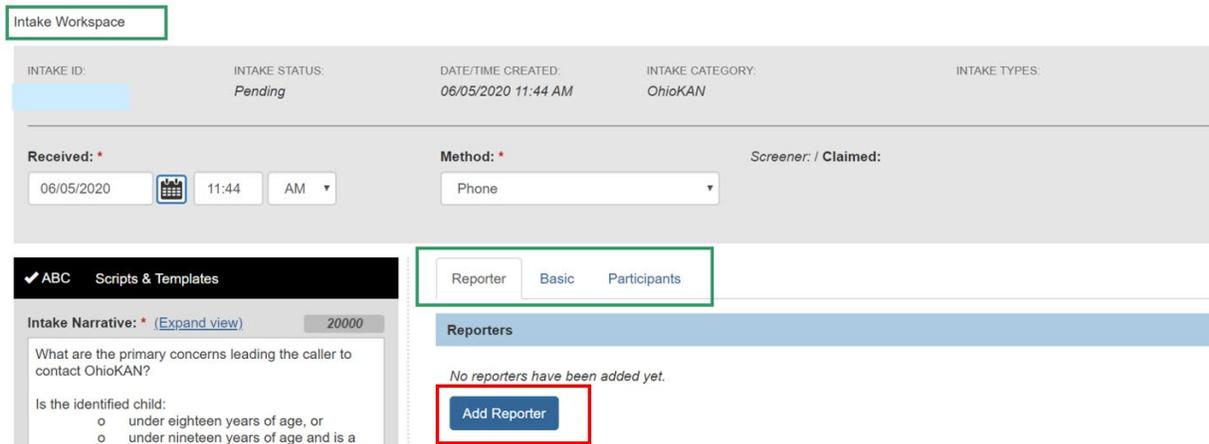
Important: Intake has an autosave feature, which includes saving the Narrative every 30 seconds as you are typing, and saving the intake whenever you move to a new tab. Autosave is activated when you first do any of the following:

- Click **Apply**.
- Click **Basic** or **Participants** to move to one of those tabs, or
- Click **Save**

Important: Once an Intake has been saved, it cannot be deleted.

Completing the Reporter Tab

1. Click **Add Reporter**.



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The **Add Reporter** screen appears.

Note: The **Reporter** is the person who is requesting OhioKAN services for themselves or someone else, or who is making an inquiry about the program.

Note: The **Reporter Information** section will default to **Individual**. If the reporter is contacting OhioKAN in their capacity as a professional or representative of a community or government agency, select the **Agency/Professional** radio button. If the reporter does not wish to identify themselves, select **Anonymous** and skip to step 13 below.

2. Click **Search Person**.

Add Reporter

Current Narrative

Current Narrative (saved) ▾

Reporter Information

Select the type of Reporter:

Individual ←

Agency / Professional

Anonymous

Reporter Details

Name: * **Search Person**

Person ID:

Gender:

Contact: Ext:

Other Contact:

Address:

Reporter Type:

Relationship to Child(ren):

The **Search For Person** screen appears.

3. Enter the **Last Name** and **First Name** of the Reporter, and any other search criteria.
4. Click **Search**.

Note: For more information on search functionality, please see the article, [Using Search Functionality](#).

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: Middle Name:

Gender:

DOB:  ~ OR ~ Age Range: -

From Age To Age

Search **Clear Form** **Return**

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The results appear in the **Person Search Results** section.

5. Click **select**, beside the appropriate person's name.
6. If the Person does not exist in Ohio SACWIS, click **Create New Person**, and refer to the **Creating a New Person** section later in this article.

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. You should always select an existing Person ID if you find a match with the name, birthdate and/or address. Failing to utilize an existing match in Ohio SACWIS will create unnecessary duplicates in the system. If the Reporter is an Adoptive Parent or Kinship Caregiver, it is highly likely they already exist as a Person ID in Ohio SACWIS.

Person Search Results

Result(s) 1 to 15 of 120 / Page 1 of 8

Include only active case members

	Person Name / ID	Address	Gender	(Age) DOB	Active Case
select			Male		
	Related Persons ▾				
select			Male		
	Related Persons ▾				

[Create New Person](#)

The **Add Reporter** screen appears, displaying the selected Person's information. If the type of Reporter is **Individual**, go to step 11.

Add Reporter

Current Narrative

Current Narrative (saved) ▾

Reporter Information

Select the type of Reporter:

Individual

Agency / Professional

Anonymous

Reporter Details

Name: * Crayon, Magenta [Search Person](#) [Clear Person](#)

Person ID: 21927548

Gender: Female ▾

[Apply](#) [Save](#) [Cancel](#)

If the **type of Reporter** is **Agency/Professional**, affiliated with any agency or organization, additional fields will display to capture the **Organization Name**, **Organization Address**, and **Organization Contact**. Follow steps 7-10 below to link the agency or organization to the record.

If the Reporter is a Professional who is not affiliated with any agency, click the **Reporter is a solo practitioner** checkbox and go to step 11.

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If the type of Reporter is **Individual**, go to step 11.

1. Click **Search Provider**.

The screenshot shows a web form for adding a reporter. It is divided into several sections: 'Add Reporter', 'Current Narrative', 'Reporter Information', and 'Reporter Details'. In the 'Reporter Information' section, 'Individual' is selected. In the 'Reporter Details' section, 'Reporter is a solo practitioner' is checked. The 'Name' field is populated with 'Crayon, Magenta' and has 'Search Person' and 'Clear Person' buttons. The 'Person ID' is '27927548' and 'Gender' is 'Female'. The 'Provider ID' field has a 'Search Provider' button. The 'Organization Name', 'Organization Address', and 'Organization Contact' fields are highlighted with a green box.

The **Search For Provider Profile** screen appears.

2. Enter search criteria.

Note: Provider Category is required. The category options are as follows:

- **Agency Contract:** A Public Children Services Agency (PCSA), private child placing agency (PCPA), or private non-custodial agency (PNA) certified by ODJFS.
- **Residential:** A licensed Children’s Residential Center.
- **Non-ODJFS:** This category includes all other providers, such as schools, day care centers, physicians, mental health agencies, hospitals, health departments, volunteer organizations, other government agencies, etc.

3. Click **Search**.

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Search For Provider Profile

Provider ID:

OR

Provider Name: Member Last Name: Member First Name: Member Middle Name:

Provider Category:

Agency Type:

Agency:

Provider Type: Include "Closed" Provider Type Status

Provider Status:

[Address, Contact and Provider Reference Criteria](#)

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

+ AKA/Nicknames

Fewer Results More Results

The **Search Results** grid appears.

4. Click **select** beside the agency/organization with which the Reporter is affiliated.

Note: If the Provider is not in Ohio SACWIS, Click **Add Non-ODJFS Provider** and follow the steps in this article: [Creating a Non-ODJFS Provider](#).

Search Results

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

	Provider Name / ID	Provider Status	Provider Category	Address
<input type="button" value="select"/>	ABC Community Services	ACTIVE	NONODJFS	4020 E 5th Avenue, Columbus, OH 43219-1811

[View Provider Type Information](#)

The **Add Reporter** screen appears, showing the selected organization information.

5. In the **Reporter Type** field, select the appropriate value from the drop-down menu.

6. Enter the **Relationship to Child(ren)** in the text box.

Note: This refers to the relationship of the reporter to the kinship or adopted child.

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Note: In the **Contact & Situation Knowledge** section, the **Contact Method** defaults to Phone. If the reporter contacted OhioKAN in another way, select the appropriate **Contact Method** from the drop-down menu.

Note: The **Date reporter contacted agency** field defaults to the date and time the Intake was created. If the contact was earlier, enter the correct date and time.

7. Select Yes or No response to **Is caregiver aware of referral?**
8. Select Yes or No response to **Can caregiver be contacted by OhioKAN?**

Note: The questions referenced in steps 7 and 8 will automatically be set to Yes when the Reporter Type is Adoptive Parent or Kinship Caregiver.

9. Select all applicable values in the **How did you hear about OhioKAN?** grid (this will activate the Add feature).
10. Click **Add** to move the values to the **Selected options** grid.
11. Click **Save**.

[Add Reporter](#)

Reporter Details

Reporter is a solo practitioner

Name: * Gum, Bubble

Person ID:

Gender: Female

Contact: 123@abc.com

Address: 123 Fascination Street Anytown, OH 12345

Provider ID:

Organization Name: ABC Community Services

Organization Address: 4020 E. 5th AVE
Columbus, OH 43219 -1811

Organization Contact: (999) 888-7777

Reporter Type:

Relationship to Child(ren):

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The **Intake Workspace** screen appears, displaying the message: **Your data has been saved.**

12. Click the **Basic** tab.

The **Basic** tab screen appears.

Completing the Basic Tab

1. Enter an **Intake Workload Name**, if desired.

Note: An Intake Workload Name will display on the Workload page and may make it easier to find a specific intake in the list.

2. Select the **County** where the family will receive services from the dropdown menu.

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3. Select the applicable option(s) from the **Intake Types** grid (this will activate the Add feature).
4. Click **Add** to move the value to the **Selected Types** grid.
5. Select the applicable **Reason(s) for Referral** from the grid.
6. Click **Add** to move the value(s) to the **Selected Reason(s) for Referral** grid.
7. Select the response in the **Are child(ren) currently living in home?** dropdown.

Note: The remaining questions on this page will display dynamically based on the selected Intake Type(s). Depending on the answers, additional questions may display. All fields shown on the screen must be answered to complete the Intake.

8. Select answer to **Is placement imminent?** from the dropdown, if applicable.
9. Enter **Estimated date of placement** or check **Date unknown** checkbox, if applicable.
10. Select answer to **Has the Adoption been finalized?** from the dropdown, if applicable.
11. Enter **Estimated date of finalization** or check **Date unknown** checkbox, if applicable.
12. Click the **Participants** tab.

The screenshot displays the OhioKAN intake form interface. At the top, there are tabs for 'Reporter' (Basic and Participants), with 'Participants' selected. The main form area is titled 'Intake Type' and contains several input fields: 'Intake Workload Name', 'County' (set to Franklin), and 'Intake Category' (set to OhioKAN). Below these are four grids for selecting intake types and reasons for referral. The 'Intake Types' grid has a red box around it and a red circle around the 'Add' button. The 'Reason(s) for Referral' grid lists various categories like 'Caregiver Mental Health' and 'Child behavior or mental health'. The 'Selected Types' and 'Selected Reason(s) for Referral' grids are currently empty.

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Additional Comments about intake (internal use only): 500

Challenging family dynamics
Child behavior or mental health
Child substance use services

Are child(ren) currently living in home? No

Is placement imminent? Yes

Estimated date of placement: [] [] Date unknown

Has the Adoption been finalized? No

Estimated date of finalization: [] [] Date unknown

Intake Status: Pending [] [] []

The **Participants** tab screen appears.

Completing the Participants Tab

Note: If a Reporter was entered with a Reporter Type of Adoptive Parent or Kinship Caregiver, that person will automatically be added as an Intake Participant and display on the tab.

1. Click **Search & Add Participants**.

ABC Scripts & Templates

Intake Narrative: * (Expand view) last saved Jun 9, 2020 12:48:02 PM 19632

What are the primary concerns leading the caller to contact OhioKAN?

Is the identified child:

- o under eighteen years of age, or
- o under nineteen years of age and is a full-time student in a secondary school or in the equivalent level of vocational or technical training, or
- o mentally or physically handicapped person under twenty-one years of age?

Reporter Basic Participants

Participants

Search & Add Participants Participant Roles

edit Buq Lightning 123 Sesame Street, Anytown, OH - 12345

Related Persons

The **Search & Add Participants** screen appears.

2. Fill in available information.
3. Click **Search**.

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Search & Add Participants

Current Narrative

Current Narrative (saved 11/06/2017 09:21 am) ▾

Search & Add Participant

First Name: Middle Name:

Last Name:

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

Fewer Results + AKA/Nicknames More Results

The results appear in the **Search Results** section.

Note: For more information, please refer to the article, [Adding Intake Participants](#).

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.

Note: If the person does not have an existing record in Ohio SACWIS, please skip to the **Creating a New Person** section below; otherwise, proceed to the next step.

4. Place a checkmark in the checkbox next to the appropriate individual's name.
5. Click **Add Selected To Intake**.

Search Results

Result(s) 16 to 30 of 120 / Page 2 of 8

	Person ID - Name	Address	Gender	(Age) DOB	Active Case
<input type="checkbox"/>	Related Persons ▾				
<input checked="" type="checkbox"/>	Related Persons ▾				
<input type="checkbox"/>	Related Persons ▾				

Creating and Linking an OhioKAN Intake

Creating a New Person

Important: 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.

If your search does not return the appropriate results:

1. Click **Create New Person**.

The screenshot shows the 'Search & Add Participants' interface. At the top, there is a 'Search & Add Participants' button. Below it, the 'Current Narrative' section is visible. The 'Search & Add Participant' section contains input fields for 'First Name', 'Middle Name', and 'Last Name'. The 'Search Results' section shows 'No Results Returned'. A red circle highlights the 'Create New Person' button.

The **Person Profile** screen appears, defaulted to the **Basic** tab. Information used in the search will be automatically populated to the new Person record.

1. Fill in any required information (denoted with a red asterisk) and any other available information under each heading.
2. Click **Save**.

The screenshot shows the 'Person Profile' screen with the 'Basic' tab selected. The 'Person Information' section is highlighted with a red border. It contains fields for 'Prefix', 'First Name', 'Last Name', 'Middle Name', 'Suffix', 'Gender', 'DOB', 'Age', 'Eye Color', 'SSN', 'Deceased', 'Deceased Date', 'Age At Time Of Death', 'Driver's License #', 'Issue State', and 'Expiration'. The 'AKA Names' section is also visible, with a table for 'Prefix', 'First Name', 'Middle Name', 'Last Name', 'Suffix', and 'AKA Type'. The 'Save' button is highlighted with a red box.

The **Person Overview** screen appears, displaying the following message: **Your data has been saved.**

3. Click **Close**.

Creating and Linking an OhioKAN Intake

Person Overview

Your data has been saved.

PERSON NAME (1)
Bug, Lady

RACE: AMERICAN / LATINO
HAIR COLOR:
EYE COLOR:

ENVIRONMENTAL HAZARDS

AKA Names

Prefix	First Name	Middle Name	Last Name	Suffix	AKA Type
--------	------------	-------------	-----------	--------	----------

Safety Hazards

Hazard Type	Begin Date	Narrative
-------------	------------	-----------

Other Addresses

Type	Address	Hazard
------	---------	--------

ICWA

Date Family Was Asked	Possible Tribal Affiliation	Tribe Name	Response/Outcome
-----------------------	-----------------------------	------------	------------------

Close

The **Intake Workspace** screen appears, with the **Participants** tab in view, displaying the added individual.

Adding Participant Roles

1. Click **Participant Roles**.

Intake Workspace

Your data has been saved.

INTAKE ID: [redacted] INTAKE STATUS: Pending DATE/TIME CREATED: 08/04/2020 11:37 AM INTAKE CATEGORY: OhioKAN INTAKE TYPES: Adoption, Kinship

Received: * 08/04/2020 11:37 AM Method: * Phone Screener: OhioKAN

Scripts & Templates

Intake Narrative: * (Expand view) What are the primary concerns leading the caller to contact OhioKAN? Is the identified child:
o under eighteen years of age, or
o under nineteen years of age and is a full-time student in a secondary school or in the equivalent level of vocational or technical training, or
o mentally or physically handicapped person under twenty-one years of age?

Reporter: Basic Participants

Participants

Search & Add Participants Participant Roles

sd| Bug, Lady... Related Persons

sd| Bug, Lightning... Related Persons

Participants Relationships

sd| Bug, Lady 1 unspecified relationship

sd| Bug, Lightning 1 unspecified relationship

The **Modify Participant Roles** screen appears displaying all Intake Participants and available Roles. On this screen you can either:

- Select an individual Participant and assign one or more Roles to that person, OR
- Select multiple Participants and assign one or more Roles to all selected Participants.

2. Click the **Current Narrative** link if you wish to display the Intake Narrative on this detail screen for reference or editing. (Optional)

Creating and Linking an OhioKAN Intake

3. In the **Select Participants to Assign/Modify Roles** grid, place a checkmark in the check box beside each Participant to whom you wish to assign a particular role(s).
4. From the **Available Roles** list:
 - a. Click the **Available Roles** you wish to assign to the selected Participant(s). Once you make a selection from the Available Roles list, the **Add** feature will be enabled.
 - b. Click **Add** to move the Role(s) to the **Selected Roles** list.
 - c. Repeat this step for any additional roles you wish to assign.

Note: If you move a role in error, select it in the **Selected Roles** list and click the **Remove** link to move it back to the **Available Roles** list.

5. When you have selected the appropriate roles, the Assign Roles button will be enabled. Click the **Assign Roles** button to assign the Selected Roles to the selected Participants.

The screenshot shows the 'Select Participants to Assign/Modify Roles' section of the OhioKAN Intake system. It features three main panels: 'Choose Participants', 'Add Participant Roles', and 'Selected Roles'. The 'Choose Participants' panel lists two participants: 'Bug, Lady' (Female, Age 15, DOB 05/05/2005) and 'Bug, Lightning' (Female, Age 66, DOB 04/04/1954). The 'Add Participant Roles' panel has an 'Available Roles' list with options: Identified Child, Adoptive Parent, Nonrelative kinship caregiver, Relative kinship caregiver, Parent, Foster Parent, and Other Professional. An 'Add' button is highlighted in red. Below this list is an 'Assign Roles' button, also highlighted in red. The 'Selected Roles' panel on the right is currently empty. At the bottom of the interface are 'Save' and 'Cancel' buttons.

The **Choose Participants** section displays the roles that have been assigned for each Participant.

6. If you assigned a role to a person in error:
 - a. Click the **Delete** icon beside the role under the appropriate Participant.
 - b. Repeat the steps above to re-assign the person's role(s) as appropriate.

Important: Each Participant must have at least one role to complete the Intake.

Note: The role of **Identified Child** should be used for the kinship and adoptive child(ren) in the home.

7. When the role assignments are complete, click the **Save** button.

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Modify Participant Roles

Current Narrative

Current Narrative (saved 06/09/2020 02:40 pm) ▾

Select Participants to Assign/Modify Roles

Choose Participants

- Bug, Lady
Female, Age 15 , DOB 05/05/2005
Relative kinship caregiver
Identified Child
- Bug, Lightning
Female, Age 66 , DOB 04/04/1954
Relative kinship caregiver

Add Participant Roles

Available Roles:

- Identified Child
- Adoptive Parent
- Nonrelative kinship caregiver
- Relative kinship caregiver
- Parent
- Foster Parent
- Other Professional

Selected Roles:

Assign Roles

Save Cancel

The **Participants** tab screen appears, showing the Participant Roles.

Intake Workspace

✓ Your data has been saved.

IN TAKE ID: **HIGH** IN TAKE STATUS: Pending DATE/TIME CREATED: 06/04/2020 08:24 AM IN TAKE CATEGORY: OhioKAN IN TAKE TYPES: Adoption , Kinship

Received: * 06/04/2020 08:24 AM Method: * Phone Screener: Archer, Jeffrey Navigator / Claimed: Archer, Jeffrey OhioKAN

✓ ABC Scripts & Templates

Intake Narrative: * (Expand view) last saved Jun 9, 2020 2:45:09 PM 19632

What are the primary concerns leading the caller to contact OhioKAN?

Is the identified child:

- under eighteen years of age, or
- under nineteen years of age and is a full-time student in a secondary school or in the equivalent level of vocational or technical training, or
- mentally or physically handicapped person under twenty-one years of age?

Reporter Basic Participants

Participants

Search & Add Participants Participant Roles Copy...

- edit Identified Child
Female 15, 05/05/2005 |
[Related Persons](#)
- edit Relative kinship caregiver
Female 66, 04/04/1954 | 123 Sesame Street , Anytown , OH - 12345
[Related Persons](#)

Intake Status: Pending Apply Save Cancel

Adding Participant Relationships

Relationships between all intake participants must be specified to complete the intake. When persons are selected, existing relationships are automatically pulled into the intake. Any relationships that have not been specified in Ohio SACWIS will be denoted with an orange dot.

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Important: You can click the **Relationships** link (under an individual's name) to expand a drawer that displays the relationships of that individual to the other people listed.

If there are individuals in the list set who do not have relationships established with one another, Ohio SACWIS will display the link as **# unspecified relationships** instead of **Relationships** (the pound sign represents the number of unspecified relationships for the individual). Click the **# unspecified relationships** link to expand the drawer displaying that individual's relationships, including unspecified relationships. The unspecified relationships will be denoted with an orange dot and orange text.

Note: Relationships between people may be viewed and maintained from various places in Ohio SACWIS. For more information, refer to this article: [Managing Person-Level Relationships](#)

1. Click **edit** to add or update Relationships for any Intake Participant.

Participants Relationships

[edit](#) Crayon , Blue Male Age 35, DOB 05/05/1985
● 2 unspecified relationships ^
• Non-Relative to Crayon , Green
• Unspecified Relationship to Crayon , Magenta
• Unspecified Relationship to Crayon , Orange

[edit](#) Crayon , Green Male Age 21, DOB 08/08/1998
[Relationships](#) v

[edit](#) Crayon , Magenta Female Age 25, DOB 05/05/1995
● 1 unspecified relationship v

[edit](#) Crayon , Orange Male Age 1, DOB 05/05/2019
● 1 unspecified relationship v

The **Manage Participant Relationships- Editor** page displays.

2. To record an unspecified relationship, or update an existing one, select the applicable Relationship from the drop-down menu under the focus person's name.

Note: The horizontal menu of names on the screen will allow you to update the relationships between one of the other persons in the list set and the other listed individuals. The arrows on either side of the menu allow you to navigate through the names in the list set.

Note: If the gender of the person has been specified on the person record, the values in the menu will be gender specific. When the relationship is selected, the reciprocal is automatically calculated, if possible, and displays as shown in green below.

3. When all Relationships are complete, click **Save**.

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Manage Participant Relationships - Editor

Editor List

Relationship Editor

Participant 1	Participant 2	Relationship	Reciprocal
Crayon , Blue Male Age 35, DOB 05/05/1985 2 unspecified relationships	Crayon , Green Male Age 21, DOB 08/08/1998	to Crayon , Green	Reciprocal: Crayon , Green is Crayon , Blue 's Non-Relative
Crayon , Blue Male Age 35, DOB 05/05/1985 2 unspecified relationships	Crayon , Magenta Female Age 25, DOB 05/05/1995 1 unspecified relationship	to Crayon , Magenta	Reciprocal: Crayon , Magenta is Crayon , Blue 's Wife
Crayon , Blue Male Age 35, DOB 05/05/1985 2 unspecified relationships	Crayon , Orange Male Age 1, DOB 05/05/2019 1 unspecified relationship	to Crayon , Orange	

Apply Save Cancel

The Participants tab screen displays.

Completing the Intake

1. Select **Complete** from the **Intake Status** dropdown menu.

ABC Scripts & Templates

Intake Narrative: * (Expand view) last saved Jul 29, 2020 3:11:30 PM 19972

This is the information.....

Participants

Search & Add Participants Participant Roles

edit	Blue	Relative kinship caregiver	Male 35, 05/05/1985 Related Persons	
edit	Crayon , Green	Identified Child	Male 11, 08/08/2008 Related Persons	
edit	Crayon , Magenta	Relative kinship caregiver	Female 25, 05/05/1995 Related Persons	

Intake Status: Pending Apply Save Cancel

Important: If required information is incomplete, the Intake Status will remain Pending, and a message like the one below will display:

2 validation message(s) We found a few areas that need your attention:

- All participants must have at least one Role (Participants).
- How did you hear about OhioKAN is required (Reporter).

INTAKE ID: HIGH 21324944 INTAKE STATUS: Pending DATE/TIME CREATED: 07/28/2020 11:32 AM INTAKE CATEGORY: OhioKAN INTAKE TYPES: Kinship

Note: The tab where the missing information is entered is listed in parentheses for each validation message.

2. Click the appropriate tab(s) and enter the missing information.

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If there is no missing information when you select Complete, the **Intake Workspace** displays a status of **Complete**.

Important: If you have screening decision maker security, the **Decision** tab will display. If you wish to record the decision immediately, click **Decision**, and go to the next section, **Recording a Screening Decision**.

3. Click Save.

Intake Workspace

INTAKE ID: 21324944	INTAKE STATUS: Complete	DATE/TIME CREATED: 07/28/2020 11:32 AM	INTAKE CATEGORY: OhioKAN	INTAKE TYPES: Kinship
---------------------	-------------------------	--	--------------------------	-----------------------

Received: * 07/28/2020 11:32 AM

Method: * Phone

Screener: Lidle, Michele / Claimed: OhioKAN

ABC Scripts & Templates

Intake Narrative: * (Expand view) *last saved Jul 29, 2020 3:19:26 PM*

This is the information.....

Reporter Basic Participants Decision

Participants

view	27927546 - Crayon, Blue Relative kinship caregiver Male 35, 05/05/1985
view	27927547 - Crayon, Green Identified Child Male 11, 08/08/2008
view	27927548 - Crayon, Magenta Relative kinship caregiver Female 25, 05/05/1995
view	27927549 - Crayon, Orange Other involved child (OIC) Female 1, 04/04/2016

Intake Status: Complete Apply Save Cancel

The **Intake Workload** screen appears, displaying the message: Your data has been saved.

Note: If you are not a screening decision maker, your work on the Intake is complete. The Intake will be picked up by a screening decision maker from the Intake Workload, to be screened in or out.

Creating and Linking an OhioKAN Intake

Recording a Screening Decision

1. Click **decision**.

The screenshot shows the 'Intake Workload' interface. At the top, there is a green notification bar that says 'Your data has been saved.' Below this is a blue header bar with the text 'Intake Workload'. Underneath the header, there is a control bar with an 'Add Intake' button, a 'View by:' dropdown menu set to 'Default', and a 'Filter' button. The main area displays a table of intakes. The table has columns for 'Claimed By', 'Intake ID', 'Screening Priority', 'Workload Name', 'Category', 'Date/Time Received', 'Screener Name', 'Status', and 'Status Date/Time'. There are three rows of data. The first row has a 'Pending' status and a 'HIGH' priority with '00:00 remaining'. The second row has a 'Screened In' status. The third row has a 'Complete' status and a 'HIGH' priority with '00:00 remaining'. In the first row, the 'view' button is highlighted with a red box, and the 'decision' option is visible in the dropdown menu. Below the table, there is an 'Add Intake' button.

The **Intake Workspace** screen appears, with the **Decision** tab in view.

2. Select the **Is this an emergency?** response from the dropdown menu.

Note: Your selection to the above question will populate the **Follow up** field, indicating follow up within 24 hours for an emergency, and 72 hours for non-emergency referrals.

Important: Emergency designation should be based on OhioKAN policies and procedures, including circumstances such as a reported risk of harm or imminent risk of disruption of the child from the home.

3. Select the **Screening decision** from the dropdown.
4. If the decision is **Screen Out**, select the **Reason for screening out**.
5. Enter the **Date & time of screening decision**, OR
6. Click **Use Current Date/Time** to populate those fields.

Note: The **Date & time of screening decision** may be backdated, but must be after the **Received** date and time.

7. Click **Save**.

Creating and Linking an OhioKAN Intake

INTAKE ID: HIGH INTAKE STATUS: Complete DATE/TIME CREATED: 07/28/2020 11:32 AM INTAKE CATEGORY: OhioKAN INTAKE TYPES: Kinship

Received: * 07/28/2020 11:32 AM Method: * Phone Screener: OhioKAN

Reporter Basic Participants Decision

Decision Details

Is this an emergency? [Dropdown]

Follow up: [Text Field]

Screening decision: [Dropdown: Screened Out]

Reason for screening out: [Dropdown]

Date & time of screening decision: [Date/Time Picker]

Use Current Date/Time [Button]

Apply Save Cancel

The **Decision Review** screen appears.

Note: If the Screening Decision is incorrect, click **Cancel** to return to the **Decision** tab and make the needed changes.

8. Click **Confirm Screening Decision** if all the information is correct.

Decision Review

Intake Summary

Saving the Screening Decision will invoke 'Post-Screening Decision' edit rules.

You are about to decision this intake as: Screened In

Received Date/Time:	07/28/2020 11:32 AM	Intake ID:	[Redacted]
Decision Date/Time:	07/29/2020 08:00 AM		
Intake Category:	OhioKAN		
Intake Types:	Kinship		

Confirm Screening Decision Cancel

The **Intake Workload** screen appears, displaying the intake with the Status of Screened In or Screened Out.

Linking an OhioKAN Intake to a Case

From the Intake Workload page:

1. Click **link**, beside the appropriate Intake ID.

Creating and Linking an OhioKAN Intake

Intake Workload

Add Intake View by: Default Filter

Showing 3 Intakes (Default view):

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screeener Name SDM Name	Status	Status Date/Time	
view edit		HIGH 00:00 remaining		OhioKAN	07/28/2020 11:32 AM		Pending	07/28/2020 11:32 AM	👁️ 📄 🗑️
view edit link				OhioKAN	07/28/2020 11:32 AM		Screened In	07/29/2020 4:15 PM	👁️ 📄 🗑️
view link				OhioKAN	07/21/2020 1:02 PM		Screened In	07/21/2020 1:12 PM	👁️ 📄 🗑️

Add Intake

The **Link to Existing Case** screen displays, showing existing OhioKAN cases in which any of the Intake Participants are already members, if applicable.

Important: If the appropriate case is not listed, skip to the **Creating a Case** section below.

2. Click the **Case Members** drawer to display a list of the family members in the listed case, to help determine if the Case is a match for the Intake you are linking.
3. Click **link** beside the appropriate Case.

Intake / Link Case

Link to Existing Case

Case(s)

	Case Name / ID	Case Status	Case Category	Status Date	Agency
link	Smith, Granny	Open	OhioKAN	07/21/2020	OhioKAN
Case Members ^					
	Costanza, Estelle Female Age 36, DOB 05/12/1984		Relationship to CRP: Biological Daughter	ACTIVE	
	Kramer, Cosmo Male Age 8, DOB 07/18/2012		Relationship to CRP: Grandson	ACTIVE	
	Crayon, Magenta Female Age 25, DOB 05/05/1995		Relationship to CRP:	ACTIVE	
	Costanza, George Male Age 5, DOB 05/05/2015		Relationship to CRP: Grandson	ACTIVE	
	Smith, Granny Female Age 59, DOB 05/31/1961		Relationship to CRP:	ACTIVE	

Create Case Cancel

The **Link to Existing Case** screen appears, displaying additional information about the people associated to the selected Case.

Note: The **Intake Participants** grid lists all the people associated to the Intake you are linking. Persons found in the Intake who are not already found in the Case may be added as **Case Members** via the linking process.

4. Place a checkmark in the check box beside any Intake Participant(s) you wish to add to the Case.
5. Click **Link to Existing Case**.

Creating and Linking an OhioKAN Intake

Intake / Link Case / Existing Case

[Link to Existing Case](#)

CASE NAME / ID: **Smith, Granny** OhioKAN
Open (07/21/2020)
AGENCY NAME: OhioKAN

Active Case Member(s)

Person Name / ID	Age, DOB	Effective Date	Relationship to CRP
Costanza, Estelle	Age 36, DOB 05/12/1984	07/21/2020	Biological Daughter
Costanza, George	Age 5, DOB 05/05/2015	07/21/2020	Grandson
Crayon, Magenta	Age 25, DOB 05/05/1995	07/29/2020	
Kramer, Cosmo	Age 8, DOB 07/18/2012	07/21/2020	Grandson
Smith, Granny	Age 59, DOB 05/31/1961	07/21/2020	Case Reference Person

Active Associated Person(s)

There are no Associated Persons for this case.

Intake Participant(s)

Person Name / ID	Age, DOB
<input type="checkbox"/> Crayon, Blue	Age 35, DOB 05/05/1985
<input type="checkbox"/> Crayon, Green	Age 11, DOB 08/08/2008
<input type="checkbox"/> Crayon, Magenta	Age 25, DOB 05/05/1995
<input type="checkbox"/> Crayon, Orange	Age 1, DOB 04/04/2019

[Link To Existing Case](#)

The **Intake Workload** screen appears, displaying the following message: **Intake #... has been linked to Case #...** as shown below.

Note: The **Case ID number** is a hyperlink to the **Case**. Click the hyperlink if you wish to navigate directly to the Case.

Note: The **Intake** no longer displays in the **Intake Workload**.

The screenshot shows a navigation bar with tabs: Home, Intake, Case, Provider, Financial, and Administration. Below the navigation bar, a green notification banner reads: "Intake #... has been linked to Case #...". Below the notification, the "Intake Workload" section is visible, featuring an "Add Intake" button and a "View by:" dropdown menu set to "Default".

Creating a Case

When you click the link hyperlink beside the appropriate case on the Intake Workload screen, the **Link to Existing Case** screen appears. If there is no appropriate Case listed on the **Link to Existing Case** screen, follow the steps below to create a new one.

1. Click **Create Case**.

Creating and Linking an OhioKAN Intake

Intake / Link Case

[Link to Existing Case](#)

Case(s)					
	Case Name / ID	Case Status	Case Category	Status Date	Agency
link	Smith, Granny	Open	OhioKAN	07/21/2020	OhioKAN
	Case Members ▾				

[Create Case](#) [Cancel](#)

The **Create New Case** screen appears.

Note: All Intake Participants are shown in the **Select Persons to Create Case** grid. Those with a checkmark will automatically be added as **Case Members** upon creation of the new **Case**. All participants will default to checked. If any participant should **not** be included as a **Case Member**, uncheck the box beside that person's name.

2. Select the **Case Reference Person** from the dropdown.

Note: The **Case Reference Person's** name and address will be used to identify the **Case**. Usually, this is the primary caregiver in the family. Options in the dropdown include all persons selected to become **Case Members**.

3. Click **Save**.

[Create New Case](#)

Select Persons to Create Case

<input checked="" type="checkbox"/>	Person Name / ID	Age, DOB	Role
<input checked="" type="checkbox"/>	Crayon, Magenta	Age 25, DOB 05/05/1995	Relative kinship caregiver
<input checked="" type="checkbox"/>	Crayon, Blue	Age 35, DOB 05/05/1985	Relative kinship caregiver
<input checked="" type="checkbox"/>	Crayon, Green	Age 11, DOB 08/08/2008	Identified Child
<input checked="" type="checkbox"/>	Crayon, Orange	Age 1, DOB 04/04/2019	Other involved child (OIC), Other involved child (OIC)

Case Reference Person: *

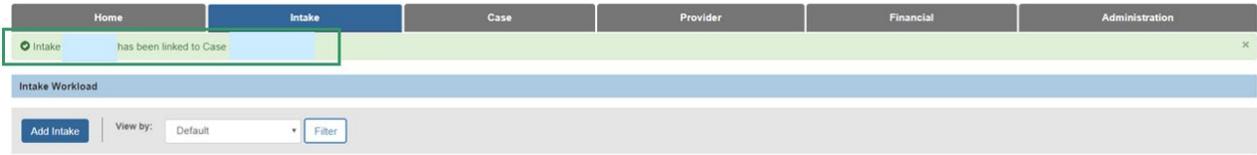
[Save](#) [Cancel](#)

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

Note: Click the **Case ID** hyperlink to navigate directly to the case, if desired.

Note: The linked **Intake** no longer displays on the **Intake Workload** page.

Creating and Linking an OhioKAN Intake



If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at SACWIS_HELP_DESK@jfs.ohio.gov .