



**Department of
Job and Family Services**

Mike DeWine, Governor
Jon Husted, Lt. Governor
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A stylized map of the state of Ohio, filled with a pattern of small grey circles, positioned in the top right corner of the header.

**Office of
Families and Children**

Ohio Database for Adult Protective Services

ODAPS

User Guide

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Terminology

- **Tab** - Salesforce Tabs that display across the top of the screen. They are specific to different types of Records contained in the system. For example, clicking on the APS Case will help you find various APS Case Records.
- **Record** - A Record in Salesforce is like a file folder. If you open an APS Case Record, it will contain all the information specific to the APS Case like client information or referral information.
- **List View** - Clicking on various tabs will present you with a List View. The default is always your Recently Viewed Records. So, if you click on the APS Case tab, then it will display Recently Viewed APS Cases. List Views can be changed using a dropdown menu.
- **Approval Process** - Salesforce has a new Approval Process for handling APS Cases, Assessments and Case Plans.
- **Cloning** - Salesforce gives you the ability to Clone existing Client Services to help you save time

Profile Descriptions

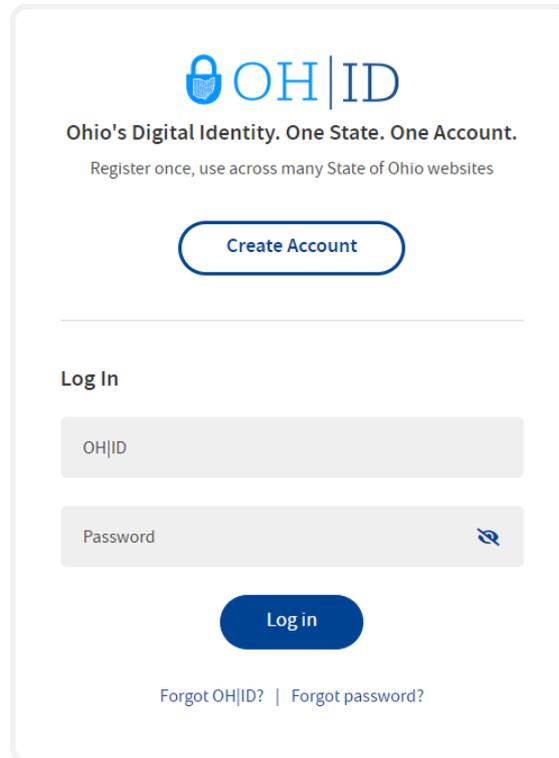
Profiles determine what a user can and can't do in the system. For example, can the view a certain object, do they have read only access to that object, can they create or edit records associated to that object.

- **APS Supervisor:** County users that have full access to their county cases, the ability to screen and transfer cases, and the ability to approve/reject tasks within a case and manage caseworkers. Supervisors can approve their own case work.
- **County Administrator:** County workers that need read access to county cases and ability to run reports. County Administrator can also assist by making approvals and rejections of tasks if necessary.
- **APS Caseworker:** County workers that need caseworker access to manage all aspects of a case from the investigation, assessment, case plan, to case notes, case closure and Ongoing case management. APS Caseworker can be given the permission to screen cases.
- **County Screener:** County workers that only need the ability to create referrals. They do not have the ability to make screening decisions. Screeners do not have the ability to complete an investigation in ODAPS. They can view existing cases but cannot view assessment or case plan data.

Logging Into ODAPS

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To Log into ODAPS, Open MyOhio.gov. You will login using your SOUID and YOUR password.



The screenshot shows the OH|ID login interface. At the top is the OH|ID logo, which consists of a blue padlock icon followed by the text "OH|ID". Below the logo is the tagline "Ohio's Digital Identity. One State. One Account." and a sub-tagline "Register once, use across many State of Ohio websites". A blue button labeled "Create Account" is centered below the text. A horizontal line separates the "Create Account" section from the "Log In" section. The "Log In" section features two input fields: the first is labeled "OH|ID" and the second is labeled "Password" with a small blue eye icon to its right. Below the input fields is a blue button labeled "Log in". At the bottom of the form, there are two links: "Forgot OH|ID?" and "Forgot password?".



[Find out more about OH|ID >](#)

Logging Into ODAPS

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Select the My Workspace tab and then select My Apps on OH|ID button. A new page will open and you can select the ODAPS – Salesforce Application.

The screenshot displays the myOhio portal interface. At the top left is the myOhio logo. The navigation menu includes 'My Workspace' (highlighted with a red box), 'My Life & Career', 'My Resources', and 'State News & Events'. On the right, there are 'Help' and 'Search' icons. Below the navigation is a carousel of news items. A dark red banner labeled 'My Workspace' is positioned above a 'Self Service' section. In the 'Self Service' area, a button labeled 'My Apps on OH|ID' is highlighted with a red box and a red arrow pointing to it from the right. Below this, a card for the 'ODAPS - Salesforce' application is shown, featuring a folder icon, a yellow star, the application name, and an 'Open App' button. A red arrow points to this card from the right.

ODAPS Navigation

You can access individual case items by either hovering over a Quick Link or by opening the related tab.

Approval History (0) Case Notes (0) Allegations/Maltreatment (1) **Assessments (0)** Case Plans (0) Alleged Perpetrators (0) Support Network (0) Household Members (0)

Assessments [New]

Assessment Number	Type	Date You Began Assessment	Status	Date Completed	Risk Score	Safety Score	Case Review/90 Day Assessment
No items to display.							

[View All](#)

Details

Related

Approval History (0)

Case Notes (0) [New]

Allegations/Maltreatments (1) [New]

Allegation/Maltreatment Number	Maltreatment Category	Date of Finding	Finding
A-0000089412	No Maltreatment	5/26/2022	No Maltreatment - Finding Unnecessary

[View All](#)

Assessments (0) [New]

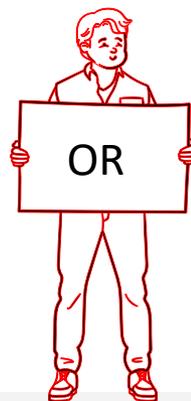
ODAPS Navigation

To edit records in ODAPS you can either inline edit by double clicking on the field or using the Edit button to open the record in full edit mode.

Initiation Date/Time

Initiation Response Type

Response Explanation ⓘ



APS Case
4028141 - 1

Edit

Request Extension

Generate Case File

Submit for Approval

List View

When you log into ODAPS, you will have a list view for APS Cases and Contacts. You can pin the desired list view to be initial list you see when opening the tab by selecting the down arrow, clicking on the list and then the pin icon.

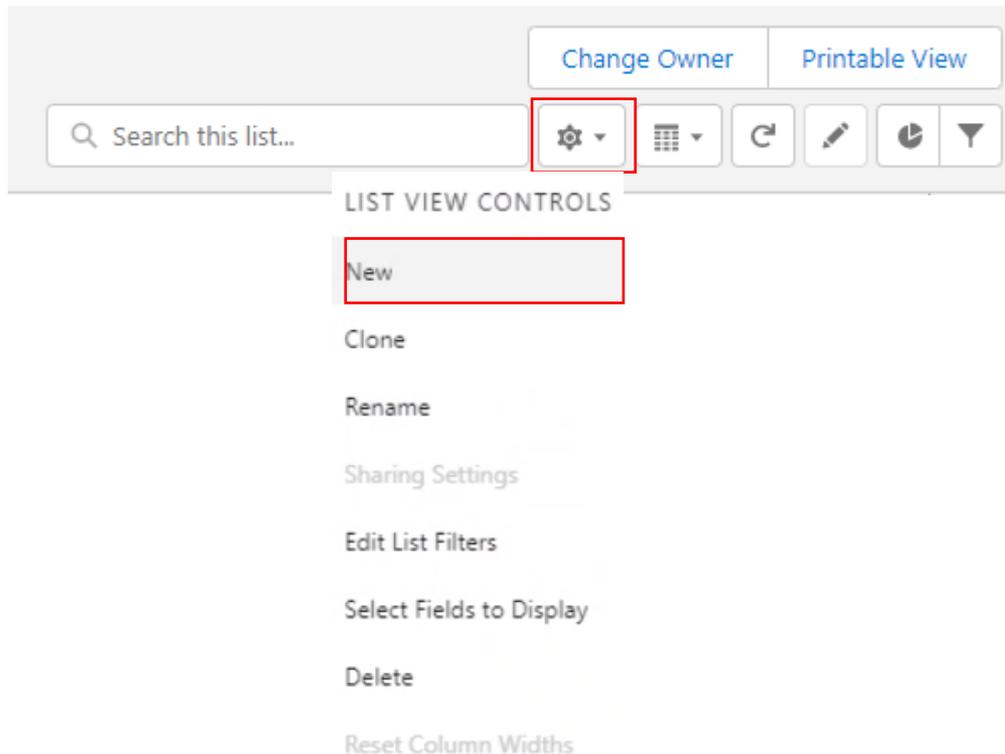
The screenshot displays the ODAPS APS Case Management interface. At the top, there are navigation tabs: 'Home', 'APS Referral', and 'APS Cases'. The 'APS Cases' tab is active. Below the navigation, there is a header for 'APS Cases' with a search icon and a dropdown menu. The dropdown menu is open, showing 'Cacy's Cases' with a pin icon (1) and a down arrow (3). Below the header, there is a table of cases with columns for 'Case Number' and 'Case ID'. The table contains 6 items, sorted by Case Number, filtered by 'All aps cases - Status, Owner Last Name'. The table is shown below.

<input type="checkbox"/>	Case Number ↑
1	<input type="checkbox"/> 4016429 - 1
2	<input type="checkbox"/> 4021890 - 1
3	<input type="checkbox"/> 4027916 - 1
4	<input type="checkbox"/> 4028169 - 2
5	<input type="checkbox"/> 4028436-2
6	<input type="checkbox"/> 4028541 - 1

On the right side of the interface, there is a sidebar with a search bar and a list of 'RECENT LIST VIEWS'. The list includes: '*My Cases', 'All Cases-Cuyahoga County', 'Cacy's Cases (Pinned list)', and 'Recently Viewed'. The 'Cacy's Cases (Pinned list)' item is highlighted with a red box (2). Below this, there is a section for 'ALL OTHER LISTS' which includes: '*My Cases - ALL', '*My Cases - Investigation Stage', '*My Ongoing Cases', and '*Transferred Cases'.

List View

To create a new list view, click on the list view controls gear dropdown and select new.



List View

In the popup box, enter your new list view name and click the blue Save button.

New List View

* List Name

New Worker's Cases

Who sees this list view?

Only I can see this list view

All users can see this list view ⓘ

Share list view with groups of users ⓘ

Cancel Save

List View

You will be redirected to a new page to add your filter criteria for the new list view.

A screenshot of a web application interface for filtering a list. At the top, there are buttons for 'Change Owner' and 'Printable View'. Below them is a search bar labeled 'Search this list...'. A 'Filter by Owner' panel is open, showing three radio button options: 'All aps cases' (selected), 'My aps cases', and 'Queue owned aps cases'. A red box highlights the 'Done' button at the bottom right of this panel. To the right, a 'Filters' panel shows the selected filter 'Filter by Owner My aps cases' and buttons for 'Add Filter' and 'Remove All'.

You can add new filters to the list view by selecting Add Filter and click the blue Save button

A screenshot of the 'Add Filter' dialog box. On the left, there are three blue arrows pointing to the 'Field', 'Operator', and 'Value' sections. The 'Field' dropdown is set to 'Owner Last Name', the 'Operator' dropdown is set to 'equals', and the 'Value' text input contains 'green'. A 'Done' button is at the bottom right of this section. On the right, there are 'Cancel' and 'Save' buttons at the top, with a red box around the 'Save' button. Below, a list of filters is shown, including 'Filter by Owner All aps cases' and a 'New Filter*' entry. A blue arrow points to the 'Add Filter' button at the bottom left of the filter list, and a 'Remove All' button is at the bottom right.

List View

Once you click Save, your new list view will display. It can now be found in your list view drop down and can be pinned if desired.

You can choose Select Fields to Display to identify the fields displayed on your list view.

APS Cases
New Worker's Cases ▼

50+ items • Sorted by Case Number • Filtered by All

<input type="checkbox"/>	Case Number ↑
1 <input type="checkbox"/>	3970336 - 1
2 <input type="checkbox"/>	3970337 - 1
3 <input type="checkbox"/>	3970345 - 1
4 <input type="checkbox"/>	3970358 - 1

LIST VIEW CONTROLS

- New
- Clone
- Rename
- Sharing Settings
- Edit List Filters
- Select Fields to Display
- Delete
- Reset Column Widths

Case Number ↑ ▼ | Client Name ▼ | Timely Initial As... ▼ | Timely Initial Re... ▼ | Timely Investiga... ▼ | Timely Initial Ca... ▼ | Report Effective ... ▼ | Case Decision D... ▼

List View

On the Select Fields to Display popup, you can select the available or visible field and click the right or left arrow to add or remove fields displayed. Click the **blue** Save button when all changes have been made.

Select Fields to Display

Available Fields

- (Date Closed - Date of Death)
- # In-progress case plans
- # of Case Plans
- # of Cases
- # of Completed Assessments
- # of Completed Assessments Form...

Visible Fields

- Case Number
- Client Name
- Timely Initial Assessment
- Timely Initial Response
- Timely Investigation
- Timely Initial Case Plan

Cancel Save

ODAPS Home Tab

The Caseworker and Screener home tab will have access to Today's Tasks, Events and Recent Items. The tasks can be filtered by clicking the arrow and selecting the filter criteria.

The screenshot displays the ODAPS Home Tab interface. At the top, there is a navigation bar with tabs: "APS Case Managem...", "Home", "APS Referral", "APS Cases", "Contacts", and "Reports". A blue arrow points to the "Home" tab. Below the navigation bar, the interface is divided into three main sections:

- Today's Tasks:** A section with a red box around the title. It features an illustration of a person working at a desk. Below the illustration, it says "Nothing due today. Be a go-getter, and check back soon." and a "View All" link.
- Today's Events:** A section with a red box around the title. It features an illustration of a person sitting at a desk. Below the illustration, it says "Looks like you're free and clear the rest of the day." and a "View Calendar" link.
- Recent Items (3):** A section with a red box around the title. It displays a list of three recent items, each with a filter icon and a dropdown arrow. A blue arrow points to the dropdown arrow of the first item.

The "Recent Items" section contains the following data:

Client Name	Case Stage	Status	Record Type
4028436-2	testing transfer referral	Investigation	Assessment/Investigation In Process Case
3970410 - 1	case extension reassign1	Investigation	Assessment/Investigation In Process Case
3970397 - 1	Test1 Jan5	Closed Case	Case Closed Case Closed

ODAPS Home Tab

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The Supervisor and County Administrator home tab will have access to Today's Tasks, Events, Recent Items and Items to Approve.

Navigation: APS Case Managem... Home APS Referral APS Cases Contacts Reports Supervisors Accounts

Today's Tasks

Nothing due today. Be a go-getter, and check back soon.

[View All](#)

Today's Events

Looks like you're free and clear the rest of the day.

[View Calendar](#)

Items to Approve

- 4028409 - 1
APS Case · Submitted by Anissa Laikens
- CP-00007563
Case Plan · Submitted by Anissa Laikens
- Assessment-0000063382
Assessment · Submitted by Anissa Laikens
- Assessment-0000063378
Assessment · Submitted by Anissa Laikens
- 4027885 - 1
APS Case · Submitted by April Hill-Jackson

[View All](#)

Recent Items (2)

	4027885 - 1
Client Name	eee nnn
Case Stage	Investigation
Status	Assessment/Investigation In Process
Record Type	Case
	4028409 - 1
Client Name	test June1
Case Stage	Investigation
Status	Assessment/Investigation In Process
Record Type	Case

ODAPS Home Tab

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To create a task or event, select the view all hyperlink. On the next screen, you can select the arrow dropdown to create your new item.

The screenshot displays the 'Today's Tasks' section of the ODAPS Home Tab. At the top, there is a header 'Today's Tasks' and a small icon of a person. Below this is a blue illustration of a person sitting at a desk with a computer, a lightbulb, and a gear. A message reads: 'Nothing due today. Be a go-getter, and check back soon.' A blue arrow points to a red-bordered 'View All' link. Below this is a 'Recently Viewed' section with a green list icon, a dropdown arrow, and a blue refresh icon. A red-bordered 'New Task' button is located in the top right corner of this section. The list contains three items, each with a search icon and the text 'Search this list..':

- New APS Case Assignment
4028337 - 1
- New APS Case Assignment
4028334 - 1
- New APS Case Assignment
4028310 - 1

ODAPS Home Tab

All user can create tasks and events for themselves. Supervisor and County Admins can create tasks and events for other workers as well.

New Task

Task Information

* Subject: 90 Day Follow-Up

Assigned To: Tamara Green

1 Total Task

Comments: See Homer for his 90 day follow up.

* Status: Open

Due Date: 7/25/2022

* Priority: Normal

Completed Date/Time

Related To

Name: Homer Simpson

Related To: Search APS Cases...

Save & New Cancel Save

New Event

Calendar Details

* Subject: Home Visit- Homer Simpson

* Assigned To: Tanisha Harry

Location: Homer's house

Start

* Date: Jul 14, 2022 * Time: 3:00 PM

End

* Date: Jul 18, 2022 * Time: 4:00 PM

Description:

Related To

Name: Homer Simpson

Related To: Search APS Cases...

Cancel Save & New Save

ODAPS Home Tab

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Your new Tasks and Events will be listed on your home tab.

My Tasks



- 90 Day Follow-Up
[Homer Simpson](#)
Jul 18
- New APS Case Assignment
[4028337 - 1](#)
No due date
- New APS Case Assignment
[4028334 - 1](#)
No due date
- New APS Case Assignment
[4028310 - 1](#)
No due date
- County Admin new task
No due date

[View All](#)

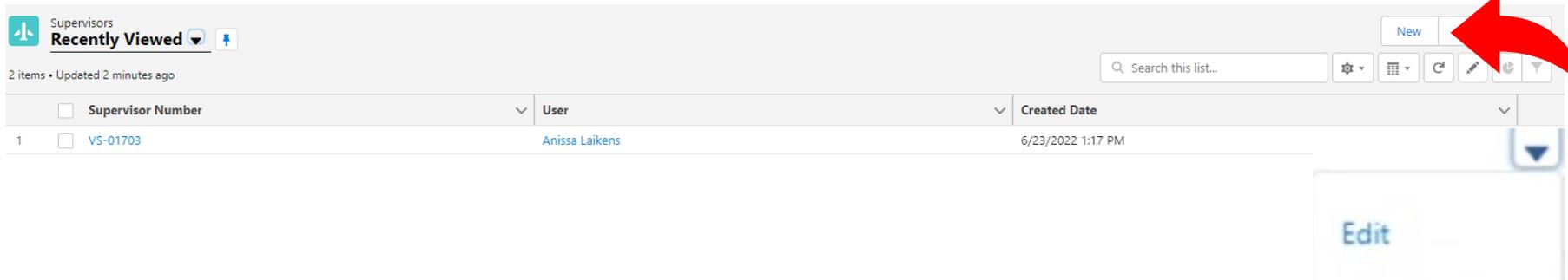
Today's Events

- Now [Home Visit- Homer Simpson](#)
Homer's house
7/18/2022 4:00 PM

[View Calendar](#)

Supervisor Assignment

Supervisor assignment can now be completed by the supervisor through the Supervisors tab. To create a new supervisor assignment, click the New button. You can also choose to edit an existing supervisor assignment by selecting the dropdown and selecting edit.



The screenshot shows a web interface for managing supervisors. At the top right, there is a 'New' button. Below it is a search bar and several action icons. A table with the following columns is displayed: 'Supervisor Number', 'User', and 'Created Date'. The table contains one row with the following data: '1', 'VS-01703', and 'Anissa Laikens'. A date '6/23/2022 1:17 PM' is visible at the end of the row. A red arrow points to the 'New' button, and another red arrow points to the first row of the table. A third red arrow points to a dropdown menu in the bottom right corner of the table, which is open and shows an 'Edit' option.

Supervisor Number	User	Created Date
1	VS-01703	Anissa Laikens

Supervisor Assignment

To create a new supervisor assignment, find the desired ODAPS user and find the corresponding supervisor you want assigned. After those two fields are complete, click Save.

New Supervisor

Supervisor Details

Supervisor Number

User

Anissa Laikens

New Supervisor

Angela Tyson-Wearren

User's Supervisor
This field is calculated upon save

Last Modified By

Created By

Cancel Save & New Save

Supervisor Assignment

To edit an already existing assignment, click the dropdown arrow beside the user you want to edit and select edit.

Edit VS-01703

Supervisor Details

Supervisor Number
VS-01703

User

 Anissa Laikens ×

New Supervisor

 Angela Tyson-Wearren ×

User's Supervisor

Tracy Pena

This field is calculated upon save

Last Modified By

 Tracy Pena, 6/23/2022 2:14 PM

Created By

 Tracy Pena, 6/23/2022 1:17 PM

Cancel

Save & New

Save

Supervisor Assignment

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Search the new supervisor's name and click save.

Edit VS-01703

Supervisor Details

Supervisor Number
VS-01703

User
Anissa Laikens

User's Supervisor
Tracy Pena
This field is calculated upon save

Created By
Tracy Pena 6/23/2022 1:17 PM

New Supervisor
Tracy Pena

Last Modified By
6/23/2022 2:14 PM

Cancel Save & New Save



Once you have successfully saved the supervisor, you will receive the **green** validation message.



APS Referral

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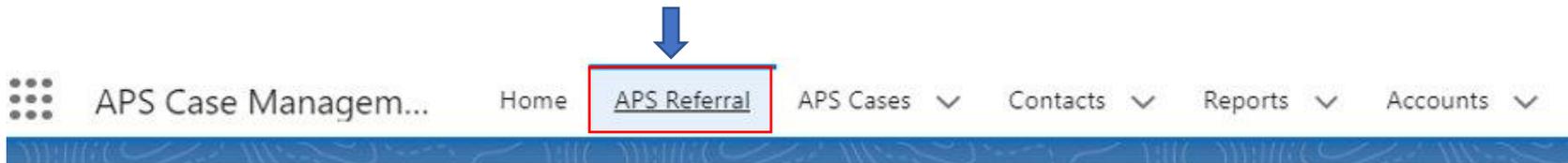


APS Referral

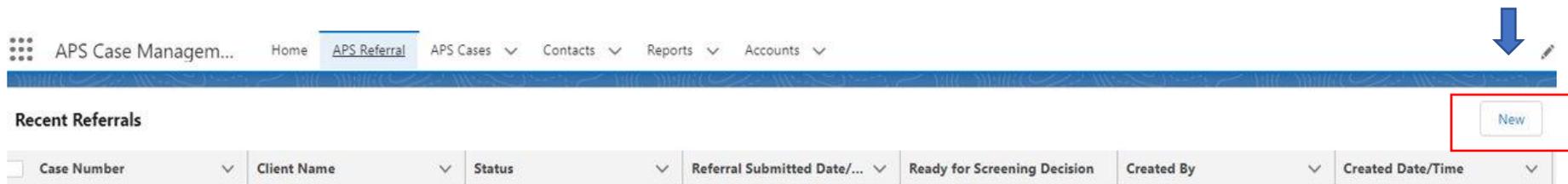
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How to create a referral

To create an APS referral, select the APS Referral tab below

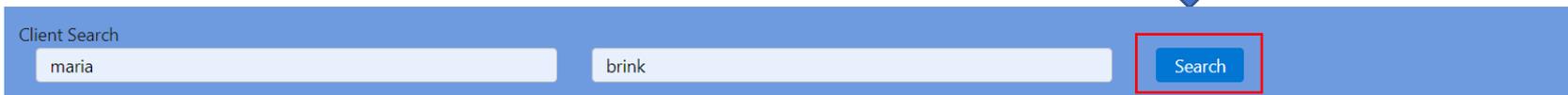


Once on the APS referral tab, select the new button



APS Referral – Client Tab

This brings you to the client page where you must search for your client to ensure they are not duplicated within the system.



Client Search

Once you search the client's name, a popup box will appear. If your client does not exist in the system, there will be no search results.

Contact Search

Filter

Gender

Select an Option

County

Select an Option

FIRST NAME

Last Name

GENDER

BIRTHDATE

PERSON ID

ADDRESS

COUNTY

No records found

← Prev

Page 1 of 0

Next →

close

APS Referral – Client Tab

If no search results are found, you will need to complete all the required fields (*) on the client page as well as any other known information about your client.

First Name <input type="text"/>	Birthdate <input type="text"/>
* Last Name <input type="text"/>	* Approx Age  <input type="text"/>
County Cuyahoga	Social Security Number <input type="text"/>
Current Street <input type="text"/>	* Gender --None--
Current City <input type="text"/>	* Ethnicity Available: Hispanic, Latino/a or Spanish Origin (non-specific), Mexican, Mexican American, Puerto Rican, Cuban Chosen: <input type="text"/>
Current State/Province Code --None--	* Race --None--
Current Zip/Postal Code <input type="text"/>	* Sexual Orientation --None--
Mailing Street <input type="text"/>	Primary Language English
Mailing City <input type="text"/>	
Mailing State/Province Code Ohio	
Mailing Zip/Postal Code <input type="text"/>	

APS Referral – Client Tab

If search results are found, this indicates the client is already in the system and will autofill the required fields as well as any known information that was added during the last case. You can also choose to filter by Gender and/or County. Please allow the search spinner to finish running before closing the window.

Contact Search

Filter

Gender

Select an Option

County

Select an Option

FIRST NAME

Last Name

GENDER

BIRTHDATE

PERSON ID

ADDRESS

COUNTY

Bart

Malone

Male

4028244

, , Ohio, , United States

Cuyahoga

← Prev

Page 1 of 0

Next →

close

APS Referral – Client Tab

The screenshot below displays how the information (both **required** and **non-required**) was auto filled based on the selection that was made from the search results.

Client Search

Search criteria:

First Name

*** Last Name**

County

Current Street

Current City

Current State/Province Code

Current Zip/Postal Code

Mailing Street

Mailing City

Mailing State/Province Code

Mailing Zip/Postal Code

Birthdate

*** Approx Age**

Social Security Number

*** Gender**

*** Ethnicity**

Available: Hispanic, Latino/a or Spanish Origin (non-specific); Mexican, Mexican American; Puerto Rican; Cuban

Chosen: Not Hispanic, Latino/a or Spanish

*** Race**

*** Sexual Orientation**

Primary Language

APS Referral – Client Tab

If the Birthdate is completed, the approximate age will update based on the DOB entered. You can enter an Approximate Age without entering a DOB.

Birthdate

* Approx Age ⓘ

Ethnicity, Race and Sexual Orientation have an unknown option.

* Gender

* Ethnicity

Available	Chosen
<ul style="list-style-type: none">Puerto RicanCubanOther Hispanic, Latino/a or Spanish OriginNot Hispanic, Latino/a or Spanish	<ul style="list-style-type: none">Unknown

* Race

* Sexual Orientation

APS Referral – Client Tab

When choosing Community for Client's Home, you must also select who the client lives with. More than one option can be chosen.

Client's Home
Community

Type of Facility
--None--

Specify Facility Type

Client Lives With

Available	Chosen
Alone	▶ Adult Child
Friend	
Grandchildren	
Homeless	

APS Referral – Client Tab

Once you've completed all the required fields and any other known information, select Save in Progress. Save in Progress will save all information entered up until this point.

If any required fields are missing when saving in progress, a red error message will display and instruct you on what still needs completed. A green message will display if all required fields have been completed.

The screenshot illustrates the user interface for saving a referral record. At the top, there are two buttons: 'Save in Progress' (highlighted with a red border) and 'Exit'. Below these buttons is a red error message box that reads: 'ERROR Please fill in the required fields for Client Info tab.' Underneath the error message is a dropdown menu for the 'Gender' field, which currently shows '--None--'. A red arrow points to this dropdown with the text 'Complete this field.' Below the dropdown is a green success message box that reads: 'Record Saved The record has been saved successfully'.

APS Referral – Allegations Tab

Once you have completed the client info tab successfully and saved, all other referral tabs will appear and be open for entry.

Client Info

Allegations

Reporting Party

Alleged Perpetrator Info

Support Network

Household Member

Save

The Allegations section is where you can be detailed in capturing all the allegation information.

Client Info **Allegations** Reporting Party Alleged Perpetrator Info Support Network Household Member Save

Allegations

*What is the Concern You Want to Report? ⓘ

Chuck is getting beat up.

Referral Submitted Date/Time

If the referral submitted date/time is left blank, it auto populate upon final save. Referral Submitted Date/Time can be backdated.

APS Referral – Allegations Tab

You can select one or more maltreatment types in the maltreatment category. "Information and Referral" is an automatic Screen Out and cannot be selected with any other Maltreatment type. "No Maltreatment" also cannot be selected with any other Maltreatment type.

Maltreatment Category

Physical Abuse

Sexual Abuse

Neglect

Information and Referral

Exploitation

Emotional/Verbal Abuse

Self-Neglect

No Maltreatment

APS Referral – Allegations Tab

Each maltreatment type selected will open its own set of sub questions. Below is the Physical Abuse allegation that was selected. Required fields will be highlighted with a red (*).

Physical Abuse

Are there any current injuries? (Check all that apply)

<input type="checkbox"/> Broken Bones	<input type="checkbox"/> Bruises
<input type="checkbox"/> Cuts	<input checked="" type="checkbox"/> Bruises
<input type="checkbox"/> Visible Marks/Injuries	<input type="checkbox"/> Scratches

Has the adult experienced any of the following? (Check all that apply)

<input type="checkbox"/> Fear as a result of a person's action *	<input type="checkbox"/> Inappropriate confinement *
<input type="checkbox"/> Inappropriate restraint *	<input type="checkbox"/> Pain as a result of a person's action *

Were there any witnesses?

--None--

Location of Allegation

--None--

Location of Allegation Description

* Physical Abuse Additional Details

Bart is getting beat up by other gang members.

APS Referral – Allegations Tab

The Condition section is where you will record any known conditions your client may have. Required fields will be highlighted with a red (*).

Condition

Does the adult have any medical, cognitive or physical disabilities or deficits?
Yes

The adult has or shows signs of (check all that apply):

<input type="checkbox"/> Decision making/understanding deficits	<input type="checkbox"/> Medical conditions
<input checked="" type="checkbox"/> Memory deficits	<input type="checkbox"/> Mental illness
<input type="checkbox"/> Physical conditions	<input type="checkbox"/> Substance abuse

Has the condition been diagnosed?
Unknown

What is the diagnosis and what are the details of the condition(s)?
[Empty text area]

The condition(s) causes the adult to (check all that apply):

<input checked="" type="checkbox"/> Have aggressive behavior	<input type="checkbox"/> Have self-injurious behavior
<input type="checkbox"/> Impact ability to communicate	<input type="checkbox"/> Memory problems
<input type="checkbox"/> Unable to protect themselves	<input type="checkbox"/> Wander
<input type="checkbox"/> Unknown	<input type="checkbox"/> None

The condition(s) causes the adult to be unable to manage (check all that apply):

<input type="checkbox"/> ADLs (toileting, bathing, hygiene, etc.)	<input type="checkbox"/> Bills/finances
<input type="checkbox"/> Healthcare/medical needs	<input type="checkbox"/> IADLs (cleaning, laundry, cooking, etc.)
<input type="checkbox"/> Unknown	<input type="checkbox"/> None

***Conditions Additional Details**

Has memory problems]

APS Referral – Allegations Tab

When selecting yes, enter all pertinent information on your at risk client. There are no required fields, however, this information could be useful to the caseworker.

At-Risk Population



Is the client at risk?

Yes

Check all that apply:

Condition Requiring Total Physical Care

Developmental/Intellectual Disability

Major Mental Illness/Emotional Disorder

Neurological Impairment - Stroke, TBI MS

Dementia/Alzheimer's

Frail Elderly

Medically Fragile

Physical Impairment

APS Referral – Allegations Tab

When selecting yes on Worker Safety, check all known safety concerns. Safety notes is the only required field.

Worker Safety

Are there safety issues for caseworkers?

Yes

If yes, check all that apply:

Dangerous/Aggressive person in home

Bug or vermin infestation

Dangerous/aggressive animals

Firearms or other weapons

Hoarding or animal hoarding

Illegal drug use

Known gang activity

Security system/cameras

Untreated mental illness

Bed Bugs

Biohazard

Contagious disease

Dangerous home structure

Gated/locked community/building

Illegal drug manufacturing

Known criminal activity/history

Police frequently called to the home

Unsafe neighborhood

Inappropriate Sexual Behaviors

* Safety Notes

Bart is in a gang.

APS Referral – Allegations Tab

This section is where you would enter any actions that have been taken prior to this call to try to address this issue. This is not a required field; however, this information could be useful to the caseworker.

Actions Taken

Actions Taken Prior to this Call

What interventions have been tried? ⓘ

What would be helpful/improve situation?

If emergency/immediate harm is selected, this will change the initiation time from 72 to 24 hours. Emergency/Immediate Harm Information becomes a required field.

Emergency/Immediate Harm

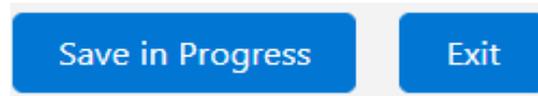
Emergency/Immediate Harm



*Emergency/Immediate Harm Information ⓘ

APS Referral – Allegations Tab

After completing the Allegations tab, be sure to hit the



Save in Progress

button at the

bottom of the

screen. A **red**



validation message will appear if any required fields have not been

completed. A

green validation



message will

appear if all required fields were

completed.

APS Referral – Reporting Party Tab

This brings you to the Reporting Party page where you must search for the reporting party to ensure they are not duplicated within the system.

Client Info Allegations **Reporting Party** Alleged Perpetrator Info Support Network Household Member Save

Reporting Party Search

Enter First Name Enter Last Name Search

Once you search the Reporting Party's name, a popup box will appear. If your Reporting Party does not exist in the system, there will be no search results.

Contact Search

maria brink Search

Filter

Gender Select an Option

County Select an Option

FIRST NAME	Last Name	GENDER	BIRTHDATE	PERSON ID	ADDRESS	COUNTY
No records found						

← Prev Page 1 of 0 Next →

close

APS Referral – Reporting Party Tab

If the Reporting Party is not found in the search, all required fields must be entered. Other known information can also be entered on this screen.

The form contains the following fields:

- First Name
- Home Phone
- *Last Name** (Required field, highlighted with a red box and a blue arrow pointing to it)
- Mobile
- Agency Name
- Phone (123-456-7890)
- Mailing Street
- Work Ext.
- Mailing City
- Email
- Mailing State/Province Code (Dropdown menu: --None--)
- Primary Language (Dropdown menu: --None--)
- Mailing Zip/Postal Code
- *Relationship Type** (Required field, highlighted with a red box and a blue arrow pointing to it)
- Does Reporting Party Live with Client (Dropdown menu: --None--)
- Relationship (Dropdown menu: --None--)
- Report came from Public Safety (Dropdown menu: --None--)
- Reporting Party Relationship Notes (Text area)
- Referral Source (Dropdown menu: --None--)

Buttons at the bottom: Save in Progress, Exit

APS Referral – Reporting Party Tab

If search results are found, this indicates the Reporting Party is already in the system and will autofill the required fields as well as any known information that was added during the last case. You can also choose to filter by Gender and/or County.

Contact Search

Filter

Gender

Select an Option

County

Select an Option

FIRST NAME	Last Name	GENDER	BIRTHDATE	PERSON ID	ADDRESS	COUNTY
Sherry	Malone	Female		4028245	123 Main Street, Cleveland, Ohio, 90210, United States	Cuyahoga

← Prev

Page 1 of 1

Next →

close

APS Referral – Reporting Party Tab

The screenshot below displays how the information (both **required** and **non-required**) was auto filled based on the selection that was made from the search results. Once completed, click the Save in Progress button.

The screenshot shows a web form for reporting party information. The form is divided into two columns. The left column contains text input fields for 'First Name', '*Last Name', 'Agency Name', 'Mailing Street', 'Mailing City', 'Mailing State/Province Code', 'Mailing Zip/Postal Code', '*Relationship Type', '*Relationship', and 'Reporting Party Relationship Notes'. The right column contains dropdown menus for 'Home Phone', 'Mobile', 'Phone', 'Work Ext.', 'Email', 'Primary Language', 'Does Reporting Party Live with Client', 'Report came from Public Safety', and 'Referral Source'. At the bottom of the form are two buttons: 'Save in Progress' and 'Exit'. Red arrows point to the 'Last Name' field, the 'Relationship Type' dropdown, and the 'Relationship' dropdown. Blue arrows point to the 'First Name' field, the 'Mailing Street' field, and the 'Agency Name' field.

First Name	Sherry	Home Phone	
*Last Name	Malone	Mobile	
Agency Name		Phone	123-456-7890
Mailing Street	123 Main Street	Work Ext.	
Mailing City	Cleveland	Email	
Mailing State/Province Code	Ohio	Primary Language	English
Mailing Zip/Postal Code	90210	Does Reporting Party Live with Client	--None--
*Relationship Type	Community or Family Member	Report came from Public Safety	--None--
*Relationship	Aunt	Referral Source	--None--
Reporting Party Relationship Notes			

Save in Progress Exit

APS Referral – Reporting Party Tab

If the Reporting Party lives with the client, you do not need to add them on the Household Members page.

Does Reporting Party Live with Client

Yes



APS Referral – Alleged Perpetrator Tab

This brings you to the Alleged Perpetrator (AP) page where you must search for the AP to ensure they are not duplicated within the system.

Client Info Allegations Reporting Party **Alleged Perpetrator Info** Support Network Household Member Save

Alleged Perpetrator Search

Enter First Name Enter Last Name Search

Once you search the AP's name, a popup box will appear. If the AP does not exist in the system, there will be no search results.

Contact Search

maria brink Search

Filter

Gender Select an Option

County Select an Option

FIRST NAME	Last Name	GENDER	BIRTHDATE	PERSON ID	ADDRESS	COUNTY
No records found						

← Prev Page 1 of 0 Next →

close

APS Referral – Alleged Perpetrator Tab

If search results are found, this indicates the AP is already in the system and will autofill the required fields as well as any known information that was added during the last case. You can also choose to filter by Gender and/or County.

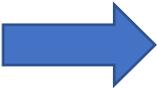
Contact Search

Filter

Gender
Select an Option

County
Select an Option

FIRST NAME	Last Name	GENDER	BIRTHDATE	PERSON ID	ADDRESS	COUNTY
John	Belville	Male		4028246	, , Ohio , , United States	Cuyahoga



← Prev Page 1 of 1 Next →

APS Referral – Alleged Perpetrator Tab

The screenshot below displays how the information (both **required** and **non-required**) was auto filled based on the selection that was made from the search results.

Alleged Perpetrator

Unknown Perpetrator

Contact Type: Alleged Perpetrator

First Name: John

* Last Name: Belville

Birthdate: [Calendar icon]

* Approx Age: 60

Alias: Johnny Boy

Mailing Street: 860 North Street

Mailing City: Cleveland

Mailing State/Province Code: Ohio

Mailing Zip/Postal Code: 90210

Home Phone: 740-867-5309

Mobile Phone: [Empty]

Business Phone: [Empty]

Work Ext.: [Empty]

Email: [Empty]

Primary Language: English

* Gender: Male

* Ethnicity

Available: Hispanic, Latino/a or Spanish Origin (non-specific); Mexican, Mexican American; Puerto Rican; Cuban

Chosen: Not Hispanic, Latino/a or Spanish

* Race: American Indian or Alaska Native

APS Referral – Alleged Perpetrator Tab

On the AP, Support Network and Household Members tab, you must select the Relationship Type and Relationship to the client, as well as the Legal Authority and Type of Legal Authority.

* Relationship Type ⓘ
--None--

Relationship ⓘ
--None--

* Perp Holds Legal Authority?
--None--

Type of Legal Authority ⓘ

Available	Chosen

APS Referral – Alleged Perpetrator Tab

If the AP lives with the client, you do not need to add them on the Household Members page. If there are no other AP's, you can select the Save in Progress button.



*Perp Lives with Client?
Yes

* Does alleged perp have access to adult? ⓘ
Yes

In what capacity does perp have access?

Remove Row

Additional

Save in Progress

Exit

APS Referral – Alleged Perpetrator Tab

If you have more than one AP, you can select the Additional button to add another one. You can also remove an unwanted AP on the referral.

The screenshot shows a list of Alleged Perpetrators. A blue arrow points to a green 'Additional' button on the left side of the first row. Another blue arrow points to a green 'Remove Row' button on the right side of the same row. Below the list, there are two blue buttons: 'Save in Progress' and 'Exit'.

Be sure to search your addition Alleged Perpetrator.

The screenshot shows a search bar with the title 'Alleged Perpetrator Search'. It contains two input fields: 'Enter First Name' and 'Enter Last Name'. To the right of the second input field is a red 'Search' button.

APS Referral – Alleged Perpetrator Tab

If your Alleged Perpetrator is unknown, select the Unknown Perpetrator checkbox

▼ Alleged Perpetrator

Unknown Perpetrator

i UNKNOWN Perpetrator ✕

You have selected Unknown for Alleged Perpetrator. Many of the required fields have been prepopulated with Unknown for a value. Enter as much information as you have and complete all the required fields.

APS Referral – Alleged Perpetrator Tab

When selecting Unknown Perpetrator, all required fields will be populated with Unknown.

The screenshot shows the 'Alleged Perpetrator' section of a form. The 'Unknown Perpetrator' radio button is selected. Several fields are highlighted with red boxes to show they are populated with 'Unknown':

- Contact Type: Unknown
- * Last Name: Unknown-0
- * Approx Age: 99
- Race: Unknown
- Ethnicity: Chosen: Unknown

Other fields include Home Phone, Mobile Phone, Business Phone, Work Ext., Email, Primary Language (English), Gender (Unknown), and Mailing information (Street, City, State/Province Code: Ohio, Zip/Postal Code).

Please note: You can change any of the unknown information with any known information you may have. If the Unknown person becomes known during the investigation, you can change the name on the contact card.

APS Referral – Support Network Tab

This brings you to the Support Network page where you can enter Support Network information as well as search for the name to ensure they are not duplicated within the system.

Client Info Allegations Reporting Party Alleged Perpetrator Info **Support Network** Household Member Save

Does Adult have support help in place.
Yes

Does the adult have:

Professional services in place

Help from family, friends, others

Guardian or conservator in place

POA in place

Rep payee in place

Support Network Narrative

Support Network Search

Enter First Name Enter Last Name Search

APS Referral – Support Network Tab

Once you search the Support Network's name, a popup box will appear. If the Support Network does not exist in the system, there will be no search results.

Contact Search

Search form with input fields for first name (containing "maria") and last name (containing "brink"), and a "Search" button.

Filter section with dropdowns for Gender and County, both set to "Select an Option".

FIRST NAME	Last Name	GENDER	BIRTHDATE	PERSON ID	ADDRESS	COUNTY
No records found						

Navigation buttons: ← Prev, Page 1 of 0, Next →

close

APS Referral – Support Network Tab

If search results are found, this indicates the Support Network is already in the system and will autofill the required fields as well as any known information that was added during the last case. You can also choose to filter by Gender and/or County.

Contact Search

Filter

Gender

Select an Option

County

Select an Option

FIRST NAME	Last Name	GENDER	BIRTHDATE	PERSON ID	ADDRESS	COUNTY
Deanna	Jones	Female		4028226	ddddddddd, , Ohio, , United States	Cuyahoga



← Prev Page 1 of 1 Next →

APS Referral – Support Network Tab

The screenshot below displays how the information (both **required** and **non-required**) was auto filled based on the selection that was made from the search results.

Support Network

First Name	Deanna	Email	
*Last Name	Jones	*Gender	Female
Mailing Street	ddddddddd	Ethnicity	
Mailing City		Available	Hispanic, Latino/a or Spanish Origin (non-specific) Mexican, Mexican American Puerto Rican Cuban
Mailing State/Province Code	Ohio	Chosen	Not Hispanic, Latino/a or Spanish
Mailing Zip/Postal Code		Race	Caucasian
Home Phone		Approx Age	75
Mobile Phone		Birthdate	

APS Referral – Support Network Tab

If you have more than one Support Network, you can select the Additional button to add another one. You can also remove an unwanted Support Network on the referral.

The screenshot shows a user interface for managing support networks. At the top, there is a light gray bar containing a green button labeled 'Additional' on the left and a green button labeled 'Remove Row' on the right. A blue arrow points to the 'Additional' button, and another blue arrow points to the 'Remove Row' button. Below this bar is a white bar containing two blue buttons: 'Save in Progress' and 'Exit'.

Be sure to search your addition Support Network member.

The screenshot shows a search bar with a blue background. On the left, it says 'Support Network Search'. Below this text are two white input fields: 'Enter First Name' and 'Enter Last Name'. To the right of these fields is a blue button with the text 'Search' in white. A red box highlights the 'Search' button.

APS Referral – Household Member Tab

This brings you to the Household Member page where you must search for the Household Member to ensure they are not duplicated within the system.

Client Info | Allegations | Reporting Party | Alleged Perpetrator Info | Support Network | **Household Member** | Save

Household Member Search

Enter First Name Enter Last Name **Search**

Once you search the Household Member's name, a popup box will appear. If your Household Member's does not exist in the system, there will be no search results.

Contact Search

maria brink **Search**

Filter

Gender

County

FIRST NAME	Last Name	GENDER	BIRTHDATE	PERSON ID	ADDRESS	COUNTY
No records found						

← Prev Page 1 of 0 Next →

close

APS Referral – Household Member Tab

If the Household Member is not found in the search, all **required** fields must be entered. Other known information can also be entered on this screen.

Household Member

First Name

*Last Name 

Mailing Street

Mailing City

Mailing State/Province Code

Mailing Zip/Postal Code

Home Phone

Mobile Phone

Business Phone

Work Ext.

Email

*Gender

Ethnicity

Available	Chosen
Hispanic, Latino/a or Spanish Origin (non-specific)	
Mexican, Mexican American	
Puerto Rican	
Cuban	

Race

Approx Age

Birthdate

Primary Language



APS Referral – Household Member Tab

If search results are found, this indicates the Household Member is already in the system and will autofill the required fields as well as any known information that was added during the last case. You can also choose to filter by Gender and/or County.

Contact Search

Filter

Gender:

County:

FIRST NAME	Last Name	GENDER	BIRTHDATE	PERSON ID	ADDRESS	COUNTY
John	Belville	Male		4028246	860 North Street, Cleveland, Ohio, 90210, United States	Cuyahoga

← Prev Page 1 of 1 Next →



APS Referral – Household Member Tab

The screenshot below displays how the information (both **required** and **non-required**) was auto filled based on the selection that was made from the search results.

HouseHold Member

<input type="text" value="John"/>	<input type="text" value=""/>
<input type="text" value="Belville"/>	<input type="text" value="Male"/>
<input type="text" value="860 North Street"/>	<input type="text" value="Not Hispanic, Latino/a or Spanish"/>
<input type="text" value="Cleveland"/>	<input type="text" value="American Indian or Alaska Native"/>
<input type="text" value="Ohio"/>	<input type="text" value="60"/>
<input type="text" value="90210"/>	<input type="text" value=""/>
<input type="text" value="740-867-5309"/>	
<input type="text" value=""/>	

APS Referral – Household Member Tab

If you have more than one Household Member, you can select the Additional button to add another one. You can also remove an unwanted Household Member on the referral.

The screenshot shows a horizontal bar representing a household member entry. On the left side of the bar, there is a green button labeled 'Additional'. On the right side, there is a green button labeled 'Remove Row'. Below this bar is another horizontal bar containing two blue buttons: 'Save in Progress' and 'Exit'. A blue arrow points to the 'Additional' button, and another blue arrow points to the 'Remove Row' button.

Be sure to search your additional Household Member

The screenshot shows a search form titled 'Household Member Search'. It contains two input fields: 'Enter First Name' and 'Enter Last Name'. To the right of these fields is a blue button labeled 'Search' with a red border.

APS Referral – Save Tab

The final step to the referral process is the Save tab. Once you have checked the Ready for Screening Decision box and click Save, the referral is ready for screening and can be found under the Referral tab on your dashboard.

Client Info Allegations Reporting Party Alleged Perpetrator Info Support Network Household Member **Save**

Ready for Screening Decision

Save

If there are any required fields not completed, you will receive a **red** error message detailing what needs completed.



If you have completed all required fields, you will receive a **green** message.



Editing An Existing Referral

The supervisor can find the referral on their referrals tab.

Recent Referrals New

Case Number	Client Name	Status	Referral Submitted Date/Time	Ready for Screening Decision	Created By	Created Date/Time
4028244 - 1	Bart Malone	New	May 25, 2022, 01:15:28 PM	✓	Anissa Aikens	Apr 28, 2022

Please note, the Case Stage and Record Type will be Referral and the Status will be New prior to the screening decision being made. Once the referral information has been reviewed, you can select a screening option or transfer the case. The referral can be edited until the screening decision has been made.



APS Case **4028244 - 1** Edit Referral Screen in Screen OUT Transfer Case Print Referral

Client Name	Case Stage	Status	Record Type
Bart Malone	Referral	New	Referral

Related List Quick Links

- Case Notes (0)
- Alleged Perpetrators (1)
- Support Network (0)
- Household Members (0)
- Court Activities (0)
- Companion Cases (0)
- APS Case History (4)
- Files (2)

APS Referral – Online

Office of
Families and Children

On-line referrals will show in your county que. These referrals will show On-line as the Referral Source.

 APS Case
3970783 - 1

Related List Quick Links ⓘ

 [Case Notes \(0\)](#)  [Alleged Perpetrators \(0\)](#)  [Support Network \(1\)](#)  [Household Members \(0\)](#)  [Court Activities \(0\)](#)

Details Related Activity

> Referral Details

∨ Referral Report Information

Referral Submitted Date/Time

What is the Concern You Want to Report? ⓘ

Jim is drinking himself to death. He Wont allow Pam to get him help.

Relationship ⓘ

Dept of Correct/Parole/Probation Officer

Referral Source
On-line

APS Referral – Online

Office of
Families and Children

You will complete a fuzzy search for the Client listed on the case. If the Client is found, you will select the name from the displayed match in the contact search box and the system will autofill the original contact information. If the client is not found, they are considered a new contact in the system. You will close the contact search box and select the “Add New?” checkbox. This will ensure that the client is not duplicated in the system.

Client Info | Allegations | Reporting Party | Alleged Perpetrator Info | Support Network | Household Member | Save

Client Search

Enter First Name | Enter Last Name | Search

Add New ?

Complete the fuzzy search on the Reporting Party, AP, Support Network and Household Member. If the contact is found, you will select them from match in the contact search box. If the contact is not found, you will leave the entered information.

APS Referral – Online

Office of
Families and Children

Once you have reviewed all the case participants and referral information, you can select the Ready for Screening Decision checkbox and click the **blue** Save button.

The screenshot displays the APS Case Management system interface. At the top, there is a navigation bar with the following items: a grid icon, 'APS Case Managem...', 'Home', 'APS Referral', 'APS Cases' (with a dropdown arrow), 'Contacts' (with a dropdown arrow), 'Reports' (with a dropdown arrow), and 'Supervisors' (with a dropdown arrow). Below this is a secondary navigation bar with tabs for 'Client Info', 'Allegations', 'Reporting Party', 'Alleged Perpetrator Info', 'Support Network', and 'Household Member'. A 'Save' button is highlighted with a red box in this bar. Below the tabs, there is a section labeled 'Ready for Screening Decision' with an unchecked checkbox. A blue arrow points to this checkbox. At the bottom right of this section, another 'Save' button is highlighted with a red box.

Now you referral is ready for Supervisor screening.

APS Contact Information

From a client's record, you can view all the Demographic, Worker Safety, Condition and At-Risk Information. You can view the information that has been entered by double clicking the arrow to expand the section. If you are the Contact Owner, you can edit or enter any new information in any of the sections.

The screenshot displays the APS Contact Information interface. At the top, there is a header for the contact 'Deanna Jones' with a 'Contact Owner' dropdown menu. Below this, there are fields for 'Title', 'Account Name' (Cuyahoga), 'Phone (2)', 'Email', and 'Contact Owner' (Anissa Laikens). A red box highlights the 'Contact Owner' field. Below the header, there is a list of expandable sections, each with a right-pointing arrow. A red box highlights the first section, 'Client Demographics'. The other sections are 'Contact Details', 'Worker Safety', 'At-Risk Population', 'End of Life Information', and 'Custom Links'.

Title	Account Name	Phone (2)	Email	Contact Owner
	Cuyahoga			Anissa Laikens

- > Client Demographics
- > Contact Details
- > Worker Safety
- > At-Risk Population
- > End of Life Information
- > Custom Links

Screen Out Referral

To make a screening decision on a referral that's been marked Ready for Screening Decision, select [blue](#) hyperlink to the Case.

Recent Referrals New

<input type="checkbox"/>	Case Number	Client Name	Status	Referral Submitted Date/Time	Ready for Screening Decision	Created By	Created Date/Time
<input type="checkbox"/>	4028401 - 2	Test Say	New	Jul 13, 2022, 02:33:35 PM	✓	Systest Community	Jun 2, 2022

To screen out a referral, select the Screen Out button.



Screen Out Referral

Select the appropriate screen out option and enter any additional notes.

The screenshot shows a dropdown menu titled "Screen Out - Update Intake". The selected option is "--None--". The menu lists several options:

- ✓ --None--
- Does Not Meet Criteria as an At-Risk Adult
- No/No Current Maltreatment
- Current Open Case
- Current allegations investigated in recent case.
- Concerns Being Addressed; APS Intervention Not Needed
- Referred to Appropriate Agency; APS Inappropriate
- Information and Referral
- Not enough info to locate client
- Does not meet age criteria

Once you complete the screening information, click the **blue** Screen Out button.

The screenshot shows the "Screen Out - Update Intake" form. A blue arrow points to the "Screen Out Reason" dropdown menu, which is set to "Does Not Meet Criteria as an At-Risk Adult". Below the dropdown is an "Additional Notes" text area. At the bottom of the form, there are two buttons: "Cancel" and "Screen Out". The "Screen Out" button is highlighted with a red box.

Screen Out Referral

Once the case has been screened out, the Case Stage, Status and Record Type will all reflect Screened Out.

Client Name [Bart Malone](#)

Case Stage	Status	Record Type
Screened Out	Screened Out	Screened Out Referral

Related List Quick Links

- [Approval History \(0\)](#)
- [Alleged Perpetrators \(1\)](#)
- [Support Network \(0\)](#)
- [Household Members \(0\)](#)
- [Court Activities \(0\)](#)
- [Case Notes \(0\)](#)
- [APS Case History \(7\)](#)
- [Files \(2\)](#)

Details Related

▼ Referral Details

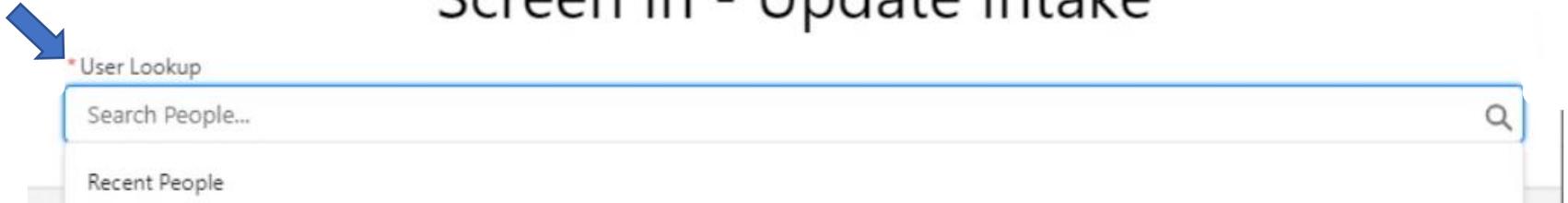
Client Name	Bart Malone
Case Number	4028244 - 1
County	Cuyahoga
Supervisor Name	
Owner	Cuyahoga County
Case Stage	Screened Out
Record Type	Screened Out Referral
Status	Screened Out
Date/Time Created	4/28/2022 1:50 PM

Screen In Referral

Once you have selected the Screen In button, you can use the user lookup to assign the case to the desired staff.



Screen In - Update Intake



Screen In Referral

Once you have found the desired worker, you can select their name and click the Screen-In button.

Screen In - Update Intake

*User Lookup

 Anissa Laikens ×



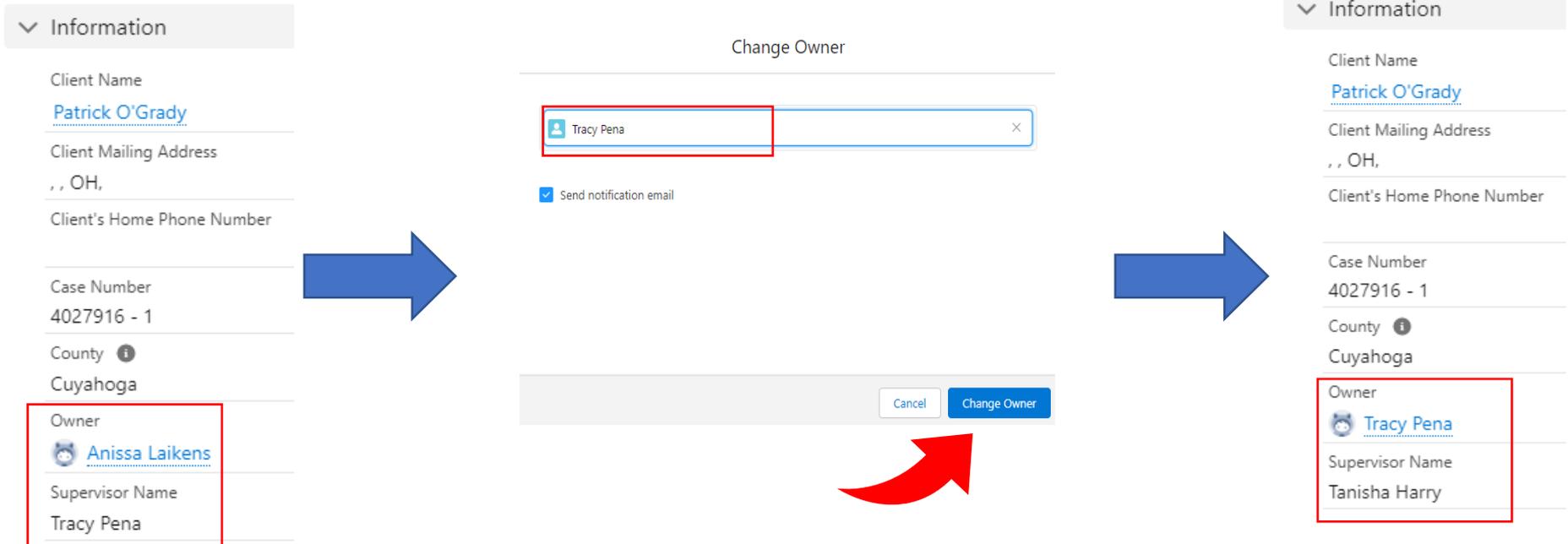
Once the case has been screened in, the Case Stage will reflect Investigation, Status will reflect Assessment/Investigation in Process and Record Type will reflect Case.

 APS Case
4028226 - 3

Client Name	Case Stage	Status	Record Type
Deanna Jones	Investigation	Assessment/Investigation In Process	Case

Case Owner

Each record has a case owner. At any time, the supervisor can change the ownership of the case to another caseworker, supervisor or themselves.



Acknowledging Ownership

After a referral is screened in, a task is created for the caseworker who is assigned to the case to acknowledge ownership. Check the homepage for any tasks you have assigned to you. You can also see the tasks under the notifications.

My Tasks



Complete to Acknowledge Ownership

Jun 18 |

[4028169 - 2](#)



Notifications

Mark all as read



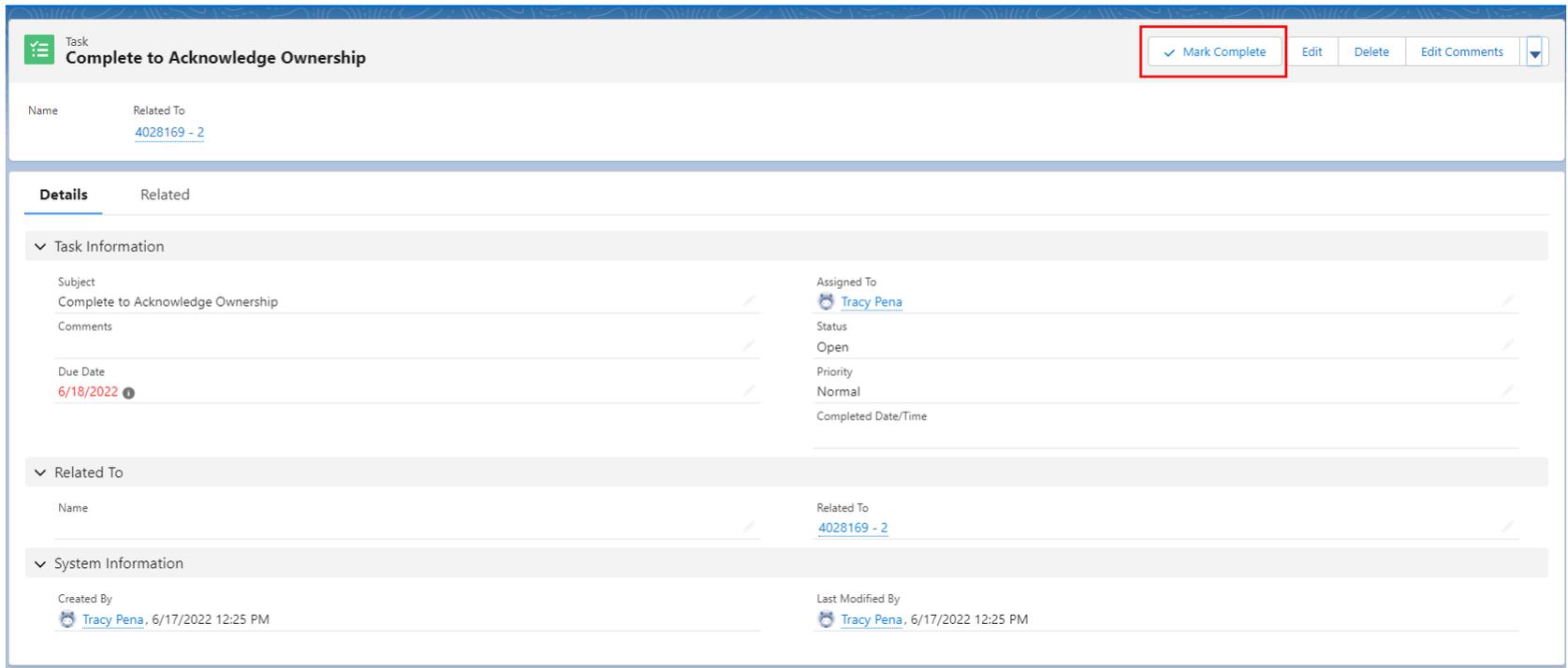
Complete to Acknowledge Ownership

6/18/2022

Jun 18, 2022 8:00 AM ●

Acknowledging Ownership

To acknowledge ownership of the case, click the  **Mark Complete** button.



The screenshot shows a task management interface. At the top, the task title is "Complete to Acknowledge Ownership". In the top right corner, there are action buttons: "Mark Complete" (highlighted with a red box and a checkmark icon), "Edit", "Delete", and "Edit Comments". Below the title, the "Name" field is labeled "Related To" and contains the link "4028169 - 2".

The main content area is divided into sections:

- Task Information:**
 - Subject: Complete to Acknowledge Ownership
 - Assigned To: Tracy Pena
 - Status: Open
 - Priority: Normal
 - Due Date: 6/18/2022
 - Completed Date/Time: (empty)
- Related To:**
 - Name: (empty)
 - Related To: 4028169 - 2
- System Information:**
 - Created By: Tracy Pena, 6/17/2022 12:25 PM
 - Last Modified By: Tracy Pena, 6/17/2022 12:25 PM

Companion Case

If there is another case at the same current location, you can link the two cases together as companion cases. Select the companion case search box to link the correct companion case.

The screenshot displays the APS Case management interface for case 4028141 - 1. At the top, there are buttons for 'Edit', 'Request Extension', 'Generate Case File', and 'Submit for Approval'. Below these are tabs for 'Details' and 'Related'. The 'Case Details' section is expanded, showing various fields. A red arrow points to a search box labeled 'Companion Case' with the placeholder text 'Search APS Cases...'. Below the search box is a list of 'Recent APS Cases' including 4028141 - 1 (Moe Stylack), 4028237 - 1 (Homer Simpson), 4028345 - 1 (test May18), 4028337 - 1 (next may 18), 4028439-2 (Transfer2 Referral2), and a '+ New APS Case' option. To the right of the search box, the 'Case Stage' is 'Investigation', and the '# of Open Allegations' is '0'. Below this, the '# of Open Perp Findings' is '3'. The text 'This field is calculated upon save' appears under the Allegations and Findings counts.

Companion Case

After selecting the case you want to be linked, it will display on the Case Details section.

APS Case **4028141 - 1** [Edit](#) [Request Extension](#) [Generate Case File](#) [Submit for Approval](#)

Details [Related](#)

Case Details

Difference of days	Case Stage
90	Investigation
Companion Case	# of Open Allegations
4028237 - 1	0
	# of Open Perp Findings
	3

Confidential Case

Only supervisors can mark a case as confidential. After a case is marked as confidential, only the caseworker, the supervisor and the county administrator can view the case.

The screenshot shows a web form for a case. The form includes the following fields and sections:

- County: Cuyahoga (with a help icon)
- Owner: Anissa Laikens (with a profile icon)
- Supervisor Name: Tracy Pena
- Supervisor E-mail: (empty text box)
- Sum of Client Services Funds Used: \$0.00
- Confidential: (highlighted with a red box)
- Confidential Reason: Agency Conflict of Interest (dropdown menu)
- Other Confidential Reason: Sister works here (text area)
- Investigation section at the bottom with buttons: Cancel, Save & New, and Save (the Save button is highlighted with a red box)

Annotations include a blue arrow pointing to the Confidential checkbox and a red arrow pointing to the Save button.

To make a Case confidential, select the Confidential checkbox, enter the Confidential Reason and Other Confidential Reason and click the blue Save button.

APS Investigation

Once the referral has been screened in, the Investigation state begins. The Report Effective Date/Time is the date the referral was screened in a becomes a report.

Investigation

Report Effective Date/Time
1/20/2022 11:19 AM

Initiation Due Date/Time
1/25/2022 11:19 AM

Initiation Date/Time
1/25/2022 10:00 AM

Initiation Response Type
Attempted Client Visit

Response Explanation ⓘ
Attempted visit, client wasn't home.

Referral Report Information

What is the Concern You Want to Report? ⓘ
Client being harassed and neglected.

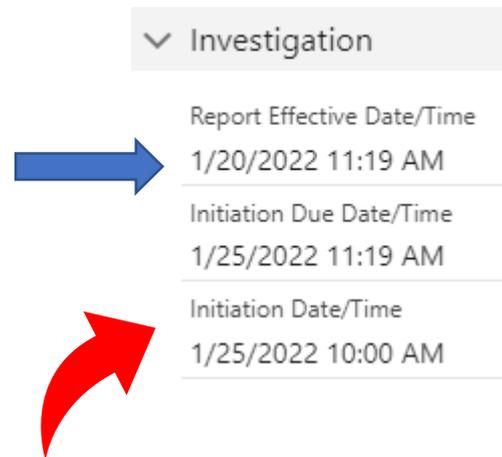
Referral Submitted Date/Time
1/20/2022 11:19 AM

The Referral Submitted Date/Time is the actual date the referral was received.

APS Investigation

The Report Effective Date/Time triggers the following ticklers:

- Initiation Due Date
- Initial Assessment Date
- Investigation Due Date
- Monthly Contact Date.



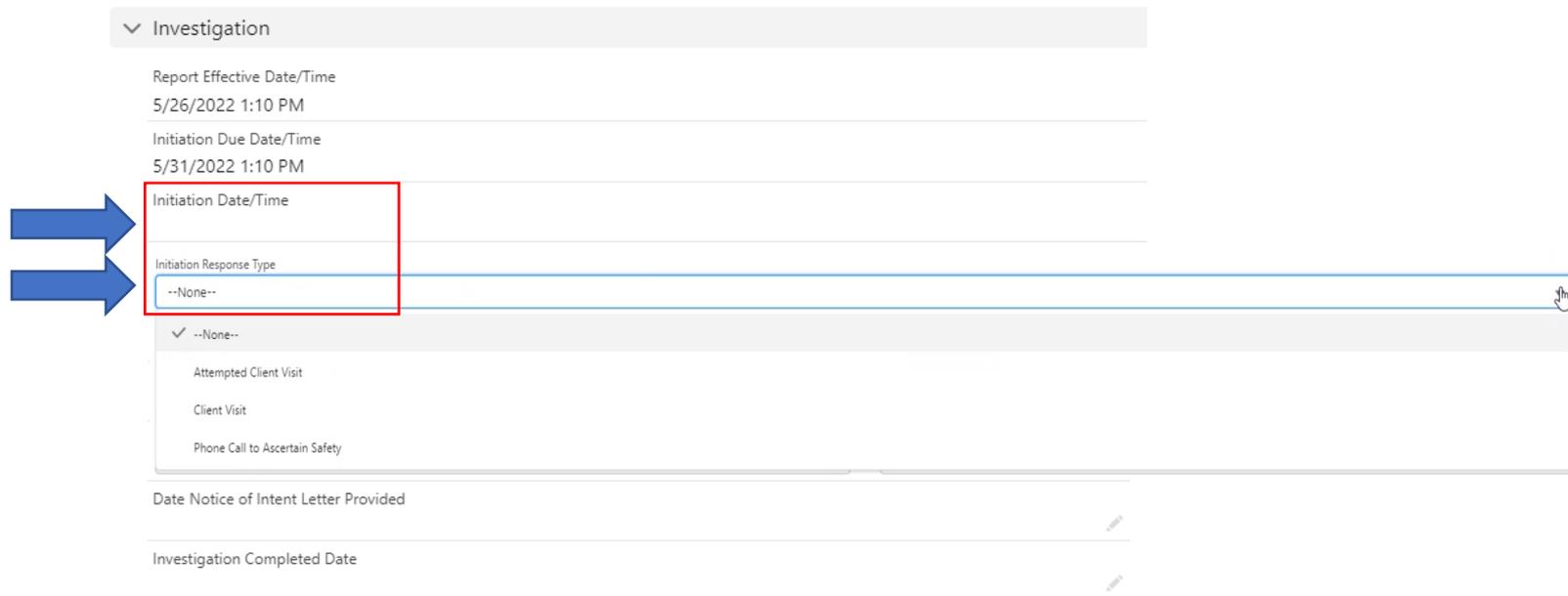
A screenshot of a software interface showing an investigation record. The record is titled 'Investigation' with a dropdown arrow. It lists three key dates and times: 'Report Effective Date/Time' as '1/20/2022 11:19 AM', 'Initiation Due Date/Time' as '1/25/2022 11:19 AM', and 'Initiation Date/Time' as '1/25/2022 10:00 AM'. A blue arrow points from the text 'The Report Effective Date/Time triggers the following ticklers:' to the 'Report Effective Date/Time' field. A red arrow points from the text 'The Initiation Due Date/Time is populated as either 24 or 72 hours from the Date the Referral was screened in. (Emergency vs. Non-Emergency)' to the 'Initiation Due Date/Time' field.

Field	Value
Report Effective Date/Time	1/20/2022 11:19 AM
Initiation Due Date/Time	1/25/2022 11:19 AM
Initiation Date/Time	1/25/2022 10:00 AM

The Initiation Due Date/Time is populated as either 24 or 72 hours from the Date the Referral was screened in. (Emergency vs. Non-Emergency)

APS Investigation

The investigation section is where you will enter the initiation information. Initiation date/time and Response Type are required fields. If the response type is Attempted Client Visit or Phone Call to Ascertain Safety, you will be required to enter a Response Explanation.



The screenshot shows a web form for an APS investigation. The form is titled "Investigation" and has a dropdown arrow on the left. It contains several input fields:

- Report Effective Date/Time: 5/26/2022 1:10 PM
- Initiation Due Date/Time: 5/31/2022 1:10 PM
- Initiation Date/Time: (highlighted with a red box and two blue arrows pointing to it from the left)
- Initiation Response Type: (highlighted with a red box and two blue arrows pointing to it from the left). The dropdown menu is open, showing options: --None--, Attempted Client Visit, Client Visit, and Phone Call to Ascertain Safety.
- Date Notice of Intent Letter Provided: (empty field)
- Investigation Completed Date: (empty field)

APS Investigation

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If you do not enter the required fields, you will get a **red** error message. You can click the hyperlink in the error message to take you to the field you need to complete.

The screenshot displays a web form for APS Investigation. The 'Initiation Response Type' dropdown is set to 'Attempted Client Visit'. The 'Response Explanation' field is empty and highlighted with a red border. A blue arrow points to this field. Below the form, a red error message box states: 'We hit a snag. Review the following fields: Response Explanation'. The 'Response Explanation' field is also highlighted with a red border in the error message. Other form fields include 'Client's Current Location' (set to '--None--'), 'Criminal Investigation Status' (set to '--None--'), and 'Agencies Assisting in Investigation' (with 'Community Centered Board' in the 'Available' list). At the bottom, there are 'Cancel' and 'Save' buttons.

Initiation Response Type
Attempted Client Visit

Response Explanation

(On APS Case Detail Page) You must enter a reason for your initial response type.

Client's Current Location
--None--

Specify Other current location

Criminal Investigation Status
--None--

Agencies Assisting in Investigation

Available
Community Centered Board

Chosen

We hit a snag.

Review the following fields

- Response Explanation

Cancel Save

APS Investigation

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If Law Enforcement Assistance is requested, you will be required to answer if the Assistance was Received. If not entered, you will receive a **red** error message.

The screenshot displays a web form for an APS investigation. On the right side, there are two dropdown menus. The first is labeled "Law Enforcement Assistance Requested?" and is set to "Yes". The second is labeled "Was Assistance Received" and is set to "--None--". This second dropdown is highlighted with a red border. Below it is a text area for "Specify why no assistance was received". On the left side, there are two date input fields. At the bottom of the form, a red error message box is displayed, stating "We hit a snag." and listing "Was Assistance Received" as a field to review. Below the error message are "Cancel" and "Save" buttons, with a mouse cursor pointing at the "Save" button.

Law Enforcement Assistance Requested?

Yes

Was Assistance Received ⓘ

--None--

(On APS Case Detail Page) Please indicate if Law Enforcement Assistance was received.

Specify why no assistance was received ⓘ

⊘ We hit a snag. ×

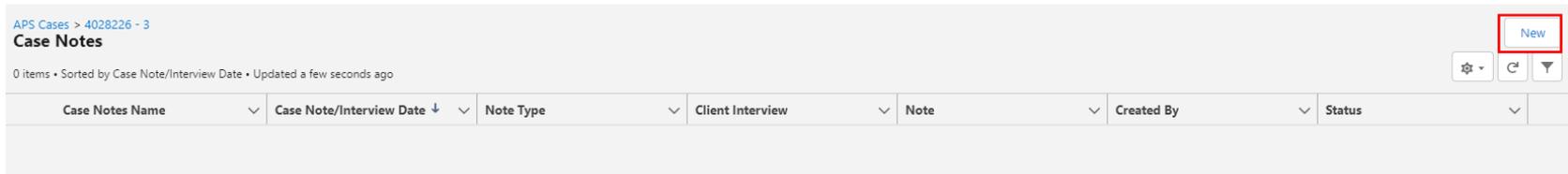
Review the following fields

- [Was Assistance Received](#)

Cancel Save

APS Case Notes

To create a case note, select the new button.



Once you select new, you will be given the option to create a Case Note or an Interview. Once you have selected the record type, click the blue next button.

New Case Note

Select a record type



Case Note

Used for capturing case notes (note type of monthly contact or other)

Interview

Used for Interview Case notes

Cancel

Next

APS Case Notes

On the new Case Note screen, you will enter the date of the note, note type and narrative. Once you have entered all the information, change your note status to Completed before hitting the blue Save button.

A green message will appear once you have created the Case Note successfully.

New Case Note: Case Note

Information

Case Notes Name

* APS Case Number
4028226 - 3

* Case Note/Interview Date
6/10/2022

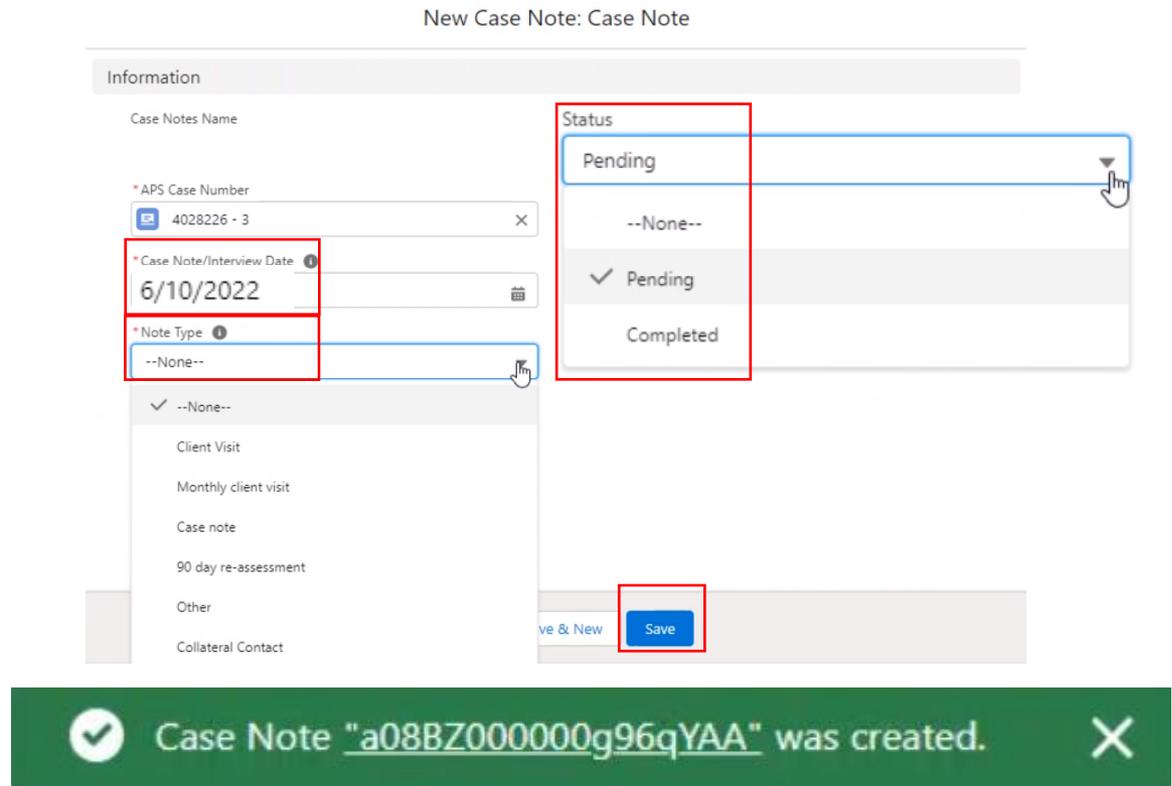
* Note Type
--None--

Client Visit
Monthly client visit
Case note
90 day re-assessment
Other
Collateral Contact

Status
Pending
--None--
✓ Pending
Completed

Save

Case Note "a08BZ000000g96qYAA" was created.



APS Case Notes

If you haven't completed all the required fields, you will get a **red** validation message detailing what fields that still need completed.

The screenshot shows a web form titled "New Case Note: Case Note". The form has several fields: "Case Notes Name", "Status" (dropdown menu with "Completed" selected), "* APS Case Number" (text input with "4028226 - 3"), "* Case Note/Interview Date" (calendar icon, "6/10/2022"), "* Note Type" (dropdown menu with "--None--" selected), "* Note" (text area), and "Supervisor Email" (text input). A red validation error message is displayed over the form, stating "We hit a snag." and listing the fields to review: "Note Type" and "Note". The "Note Type" and "Note" fields are also highlighted with red boxes. At the bottom of the form, there are buttons for "Cancel", "Save & New", and "Save".



APS Case Notes

If interviewing the client, check the client interview box and the client's name will auto-populate in the Interview Conducted With field.

The screenshot shows a web form for entering APS Case Notes. The form is divided into several sections:

- Case Notes Name:** A text input field.
- * APS Case Number:** A text input field containing "4028226 - 3".
- Client Interview:** A checkbox labeled "Client Interview" which is checked. This field and the "Interview Conducted With" field below it are highlighted with a red border.
- Interview Conducted With:** A search field with the placeholder text "Search Contacts..." and a magnifying glass icon.
- Non-Participating Contact:** A text input field.
- Client Interview Outside Perp Presence?:** A dropdown menu currently showing "--None--".
- Explain Why Perp Attended Interview:** A text area for providing details.
- APS Case:** A search field with the placeholder text "Search APS Cases..." and a magnifying glass icon.
- Original Case Note:** A search field with the placeholder text "Search Case Notes..." and a magnifying glass icon.
- Status:** A dropdown menu currently showing "Pending".
- * Case Note/Interview Date:** A date selection field with a calendar icon.
- * Note:** A text area for additional notes.

At the bottom of the form, there are three buttons: "Cancel", "Save & New", and "Save".

APS Case Notes

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To complete the client interview Case Note, enter the case note date/time the note section, change the status to Completed and click the **blue** Save button.

The screenshot shows the APS Case Notes form with several fields. A red box highlights the 'Status' dropdown menu, which is currently set to 'Pending'. Another red box highlights the 'Case Note/Interview Date' field, which is empty. A third red box highlights the 'Note' text area, which is also empty. At the bottom of the form, a red box highlights the 'Save' button. Other fields include 'Case Notes Name', '* APS Case Number' (4028226 - 3), 'Client Interview' (checkbox), 'Interview Conducted With' (search), 'Non-Participating Contact', 'Client Interview Outside Perp Presence?' (dropdown), 'Explain Why Perp Attended Interview' (text area), 'APS Case' (search), 'Original Case Note' (search), and 'Supervisor Email' (text field). At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

You will receive a **green** validation message upon successfully saving a Case Note.

✓ Case Note "a08BZ00000gcNQYAY" was created. ✕

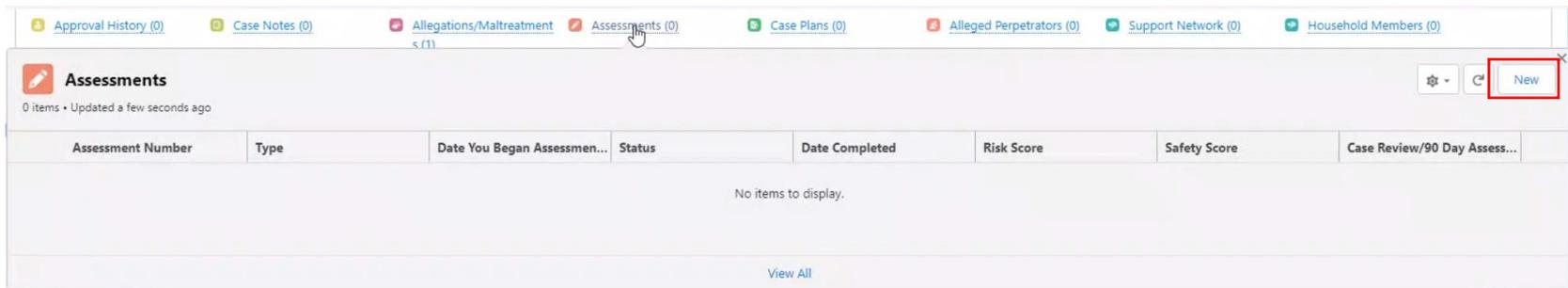
Assessment

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Assessment

To start an assessment, select the New button.



The screenshot shows a software interface with a top navigation bar containing several menu items: Approval History (0), Case Notes (0), Allegations/Maltreatment (1), Assessments (0), Case Plans (0), Alleged Perpetrators (0), Support Network (0), and Household Members (0). Below this is a section titled 'Assessments' with a sub-header '0 items • Updated a few seconds ago'. In the top right corner of this section, there is a 'New' button highlighted with a red box. Below the header is a table with the following columns: Assessment Number, Type, Date You Began Assesmen..., Status, Date Completed, Risk Score, Safety Score, and Case Review/90 Day Assess... The table is currently empty, displaying 'No items to display.' and a 'View All' link at the bottom.

Assessment Number	Type	Date You Began Assesmen...	Status	Date Completed	Risk Score	Safety Score	Case Review/90 Day Assess...
No items to display.							
View All							

Assessment

To begin your assessment, enter the date you began the assessment in the field and the assessment type. Please note that 90 Day Assessment can only be done at 90 days. Once that is completed, you can proceed to the individual tabs to complete your assessment.

Save In Progress Assessment Complete Cancel

Assessment

Details ADLs/IADLs Cognition Behavioral Medical Home/Residence Financial Maltreatment Support Services Caregiver/Perpetrator Case Review - Only for 90 Day Assessments

Details

APS Case Number

4028226 - 3

Date You Began Assessment in the Field

Assessment Type

--None--

Initial Assessment

90 Day Assessment

save in progress Assessment Complete Cancel

Assessment

When completing a 90 day assessment where no info has changed from the last approved assessment, you can open the last approved assessment and select the Clone option.

Assessment
Assessment-0000063306

Edit Assessment Approval Printable View

Clone

Print Assessment

Submit for Approval

Related **Details**

APS Case Number
[3970814 - 1](#)

Date You Began Assessment in the Field
7/21/2022

Type **1**
Initial Assessment

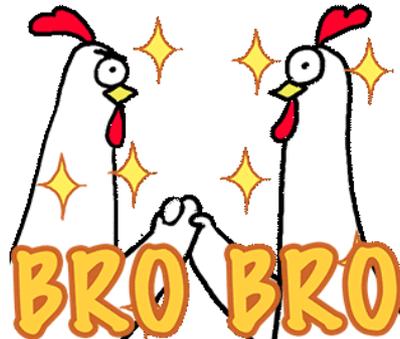
No Change from Prior Assessment **1**

No Change Information **1**

Close Case

Amend Case Plan

Assessment Approval Status
Approved



Assessment

A new window will appear where you change the type to 90 Day Assessment, check the No Change from Prior Assessment checkbox, add No Change Information and indicate if you are closing the case or amending the case plan. When you are finished, select the **blue** Save button.

New Assessment: Assessment (Locked)

Information

* APS Case Number
3970814 - 1

Status
Complete

Date You Began Assessment in the Field
7/21/2022

Date Completed
8/12/2022

Type
90 Day Assessment

No Change from Prior Assessment

No Change Information
No change in info.

Close Case
No

Amend Case Plan
No

Assessment Approval Status
Approved

ADLs/IADLs

Bathe, Shower, or Sponge Bathe
No Impact

Eating and Drinking
No Impact

Ambulation (walking, mobility)

Cancel Save & New **Save**

Assessment

All tabs within the assessment will have a check all option. If you select the check all option, you can select another option for individual items affected. If No Impact or Unknown is selected, a Summary is not required.

ADLs/IADLs Check All

--None--

✓ --None--

No Impact

Minor Impact

Significant Impact

Unknown

Assessment

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If you select the Assessment Complete button and you have not entered all required information, you will receive an error message detailing what you need to complete.



An error occurred while trying to update the record. Please try again.
Summary of ADLs/IADLs is required.

Assessment

Case Review-Only for 90 Day Assessments tab should only be completed for 90-day assessments. Indicate if the case will be closing or the case plan will be amended.

Assessment

Save In Progress

Assessment Complete

Cancel

Details ADLs/IADLs Cognition Behavioral Medical Home/Residence Financial Maltreatment Support Services Caregiver/Perpetrator **Case Review - Only for 90 Day Assessments**

Case Review - Only for 90 Day Assessments

Close Case?

✓ --None--
Yes
No
--None--

Amend Case Plan?

✓ --None--
Yes
No
--None--

Assessment Complete

Cancel

Assessment

Once you have selected the Assessment Complete button, you will be routed to the assessment details page where the Status displays as Complete and the Date Completed is populated.

Details

Related

APS Case Number

[4028226 - 3](#)

Date You Began Assessment in the Field

5/27/2022

Type ⓘ

Initial Assessment

No Change from Prior Assessment ⓘ

No Change Information ⓘ

Close Case

Amend Case Plan

Assessment Approval Status

Client Name

Deanna Jones

Status ⓘ

Complete

Date Completed ⓘ

5/27/2022

Case Review/90 Day Assessment Due date

8/25/2022

Assessment

Office of
Families and Children

Once completed, the worker will Submit for Approval to route the item to their supervisor. Once the item has been routed, the Assessment will be locked.

Assessment
Assessment-0000063373

Edit **Submit for Approval** Clone Print Assessment

Details **Related**

Assessment History (4)

Date	Field	User	Original Value	New Value
5/27/2022 12:08 PM	Record locked.	Anissa Laikens		
5/27/2022 12:00 PM	Created.	Anissa Laikens		
5/27/2022 12:00 PM	Record Type	Anissa Laikens	Assessment (In Progress)	Assessment (Locked)
5/27/2022 12:00 PM	Date Completed	Anissa Laikens		5/27/2022

[View All](#)

Files (0) [Add Files](#)

[Upload Files](#)

Or drop files

Approval History (2) [Recall](#)

Step Name	Date	Status	Assigned To
Step 1	5/27/2022 12:08 PM	Pending	Tracy Pena
Approval Request Submitted	5/27/2022 12:08 PM	Submitted	Anissa Laikens

[View All](#)

If a worker needs to make edits before the final approval, they can recall the assessment via the related tab. You will receive a **green** validation message confirming the recall.

 Assessment was recalled. 

Assessment

Once recalled, your assessment history of the record will display unlocked, and the Approval History will display recalled.

 **Assessment History (5)**

Date	Field	User	Original Value	New Value
5/27/2022 12:15 PM	Record unlocked.	Anissa Laikens		
5/27/2022 12:08 PM	Record locked.	Anissa Laikens		
5/27/2022 12:00 PM	Created.	Anissa Laikens		
5/27/2022 12:00 PM	Record Type	Anissa Laikens	Assessment (In Progress)	Assessment (Locked)
5/27/2022 12:00 PM	Date Completed	Anissa Laikens		5/27/2022

[View All](#)

 **Files (0)** [Add Files](#)

[Upload Files](#)

Or drop files

 **Approval History (2)**

Step Name	Date	Status	Assigned To	
Step 1	5/27/2022 12:15 PM	Recalled	Tracy Pena	▼
Approval Request Submitted	5/27/2022 12:08 PM	Submitted	Anissa Laikens	▼

Assessment

Office of
Families and Children

After making edits to the assessment, select Assessment Complete and submit for approval to your supervisor. You will receive a **green** validation message if successful.



Assessment was submitted for approval.



Supervisor Approval

The supervisor will find the item for approval on their home tab under Items to Approve. They can Approve, Reject or Reassign the item to another worker.

You can select the hyperlink under Items to Approve to view the work item and make a decision.



Items to Approve

[Assessment-0000063373](#)

Assessment · Submitted by Anissa Laikens

Approve

Reject

Reassign

Or

You can select the dropdown arrow to make the decision on the work item

Supervisor Approval

Office of
Families and Children

If the supervisor selects the item, they can review the details before Approving, Rejecting or Reassigning. The item will be in Pending status.

Approval Request
Assessment Approval Pending

Approve Reject Reassign

Submitter	Date Submitted	Actual Approver	Assigned To
Anissa Laikens	May 27, 2022	Tracy Pena	Tracy Pena

Details

Approval Details

Assessment Number	APS Case Number
Assessment-0000063373	4028226 - 3
Client Name	Created By
Deanna Jones	Anissa Laikens, 5/27/2022 12:00 PM

No Comments

Supervisor Approval

If the supervisor is the owner of the case, they can approve their own work items, assessment, extension, case plan, case decision etc. On an assessment, the supervisor can select the Assessment Approval button and select Approved in the Assessment Approval Status dropdown. New, In Review and Rejected can also be selected.

Assessment Approval

Assessment Approval

APS Case Number
4016413 - 1

Assessment Approval Status
Approved

Cancel Save

Extension Request
Approved

Extension Reason
testing from classic

The supervisor can approve their own extension request by clicking the down arrow and selecting Approved.

Supervisor Approval

Supervisor can approve their own Case Plan by selecting Approved in the status dropdown.

Case Plan Details

*APS Case Number
4016413 - 1

Client Name
This field is calculated upon save

Client Consent to Services
Yes

Version
1

Status
Approved

of Not Yet Implemented Client Services
0

Supervisor Approval

Supervisors can enter and approve their own Case Decision Information. Supervisors will complete the required fields and select the Approval Status from the Case Decision Approval Status dropdown.

APS Case
4016413 - 1

Case Decision Information

Case Decision Due Date
2/19/2022

Case Decision
Open for Ongoing Services

Case Decision Date/Time
Date: 7/15/2022 Time: 12:00 PM

Case Decision Reason
Allegations are valid.

Closure Reason
--None--

View all dependencies

Case Closure Summary ⓘ

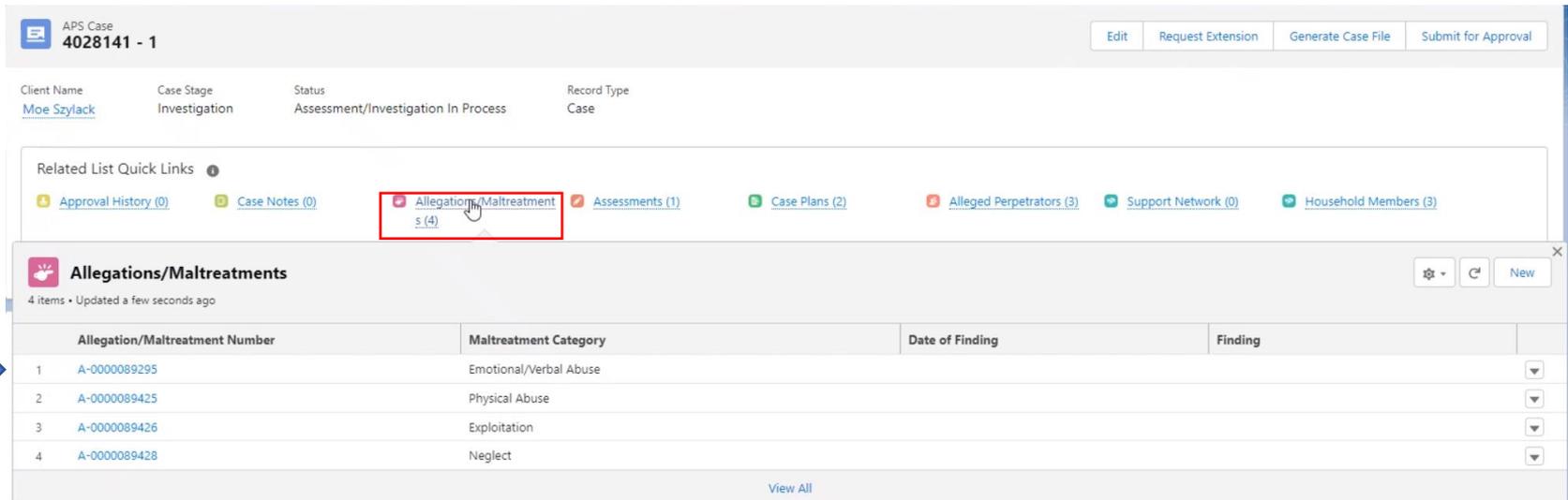
Ongoing Alleged Perpetrator Involvement? ⓘ
--None--

Case Decision Approval Status
Approved



Allegation Finding & Summary of Evidence

After a referral is screened in, each maltreatment has its own allegation/maltreatment record created. To complete the finding and summary of evidence on your allegation, select the allegation/maltreatment tab and open each allegation.



The screenshot displays the APS Case interface for case 4028141 - 1. The client name is Moe Szylock, and the case stage is Investigation. The status is Assessment/Investigation In Process, and the record type is Case. The interface includes a 'Related List Quick Links' section with several tabs: Approval History (0), Case Notes (0), Allegations/Maltreatments (4), Assessments (1), Case Plans (2), Alleged Perpetrators (3), Support Network (0), and Household Members (3). The 'Allegations/Maltreatments' tab is highlighted with a red box. Below this, a table titled 'Allegations/Maltreatments' shows 4 items. A blue arrow points to the first row of the table.

	Allegation/Maltreatment Number	Maltreatment Category	Date of Finding	Finding
1	A-0000089295	Emotional/Verbal Abuse		
2	A-0000089425	Physical Abuse		
3	A-0000089426	Exploitation		
4	A-0000089428	Neglect		

Allegation Finding & Summary of Evidence

As part of the investigation, each allegation record must have a finding, date of finding and summary of evidence before the case decision is made. If there are multiple maltreatments, you can designate which one is the Primary Maltreatment by selecting the checkbox. Click the **blue** Save button when complete. Please note: Additional allegations cannot be added after the case decision has been made.

 Allegation/Maltreatment
A-0000089295

[Edit](#) [Printable View](#) [Add Perpetrators](#)

Details Open Activities Allegations & Perpetrators Activity History

APS Case Number
[4028141 - 1](#)

Maltreatment Category
Emotional/Verbal Abuse

Location of Allegation

Location of Allegation Description ⓘ

APS Case Decision Date

Date of Finding

Finding ⓘ

Summary of Evidence

Primary Maltreatment

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

Allegation Finding & Summary of Evidence

If your allegation is Exploitation, there is a subset of information you must complete.

Details | Open Activities | Allegations & Perpetrators | Activity History

APS Case Number
4028141 - 1

Maltreatment Category
Exploitation
[View all dependencies](#)

Location of Allegation
--None--

Location of Allegation Description ⓘ

APS Case Decision Date

Date of Finding
6/15/2022

Finding ⓘ
Unable to Investigate/Not Required
[View all dependencies](#)

Summary of Evidence
Couldn't get a hold of bank.

Primary Maltreatment

Exploitation Information

Financial Exploitation

Other Exploitation

Exploitation Non Specific

Created By
Anissa Laikens: 6/13/2022 2:46 PM

Approximate Loss of Assets ⓘ

Amount Recovered ⓘ

Last Modified By
Anissa Laikens: 6/15/2022 1:38 PM

Cancel Save

Allegation Finding & Summary of Evidence

You can view your Allegations and the Findings in the dropdown grid once they are complete.



Allegations/Maltreatments 4 items • Updated a few seconds ago

	Allegation/Maltreatment Number	Maltreatment Category	Date of Finding	Finding	
1	A-0000089295	Emotional/Verbal Abuse	6/15/2022	Validated	▼
2	A-0000089425	Physical Abuse	6/15/2022	Not Validated	▼
3	A-0000089426	Exploitation	6/15/2022	Unable to Investigate/Not Required	▼
4	A-0000089428	Neglect	6/15/2022	Validated	▼

[View All](#)

You can also view the Alleged Perpetrators you have identified for the Allegations/Maltreatments.

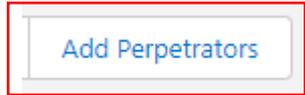


APS Cases > 4028141 - 1
Alleged Perpetrators 3 items • Updated a minute ago

	Perpetrator ID	Perpetrator Name	Relationship	Perp Lives with Client?	Perp Holds Legal Authority?	Finding	
1	P-070591	Homer Simpson	Animal Control	No	Yes		▼
2	P-070590	Ned Flanders	Unknown	Unknown	Unknown		▼
3	P-070598	Barney Gumble	Roommate	Yes	Yes		▼

Linking Alleged Perpetrator to Allegation

To link the Alleged Perpetrator to the Allegation, select the Add Perpetrators button. A popup window will appear, select all AP's that apply to that allegation and click the blue Add Perpetrators button.

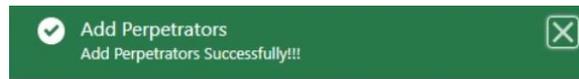


Add Perpetrators To Allegation

<input type="checkbox"/>	Perpetrator ID	Perpetrator Name	County	Address	Created Date
<input checked="" type="checkbox"/>	P-070591	Homer Simpson		Ohio,	2022-04-19T18:26:39.000Z
<input type="checkbox"/>	P-070590	Ned Flanders		Ohio,	2022-04-19T18:25:25.000Z
<input type="checkbox"/>	P-070598	Barney Gumble		Ohio,	2022-04-20T17:14:42.000Z



Once you have successfully added the perpetrators, you'll get a green success message.



Alleged Perpetrator Findings & Summary of Evidence

To edit the perpetrator, click the Edit Perpetrator button.

Alleged Perpetrator P-070591 Printable View Add Allegations Edit Perpetrator

Details Related

Perpetrator ID P-070591	Known Illegal Activity Unknown
APS Case 4028141 - 1	Explain Illegal Activity
Client Name Moe Szylack	
Perpetrator Name Homer Simpson	Date of Death
Birthdate ⓘ	NAMRS CPR7 Other unknown

Alleged Perpetrator Findings & Summary of Evidence

Scroll to the bottom of the AP page and you will see where you can enter the Findings and Summary of Evidence for each allegation that relates to your AP.

 Emotional/Verbal Abuse Finding --None--	 Emotional/Verbal Abuse Summary
Exploitation Finding --None--	Exploitation Summary of Evidence
Neglect Finding --None--	Neglect Summary of Evidence
Physical Abuse Finding --None--	Physical Abuse Summary of Evidence

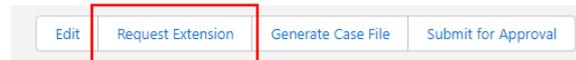
Alleged Perpetrator Findings & Summary of Evidence

After the Findings and Summary of Evidence have been entered and you select Save, you will see the information populated on the AP tab.

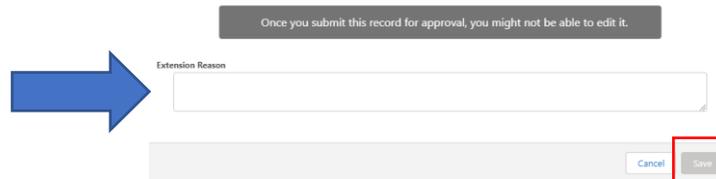
Self-Neglect Finding	Self-Neglect Summary of Evidence
Exploitation Finding	Exploitation Summary of Evidence
Physical Abuse Finding	Physical Abuse Summary of Evidence
Sexual Abuse Finding	Sexual Abuse Summary of Evidence
Emotional/Verbal Abuse Finding	Emotional/Verbal Abuse Summary
Neglect Finding Validated	Neglect Summary of Evidence Homer was found to have neglected Moe.

APS Case Extension

If an extension is needed, the worker can select the Request Extension button.



Enter the reason for the extension request and click save.



After refreshing your screen, the extension request will change from Not Requested to Requested and the Extension Reason will be displayed

Extension Request
Not Requested

Extension Reason

Extension Request
Requested

Extension Reason
need more time.

APS Case Extension

Once submitted the supervisor can find the approval request on their home page. The supervisor can act on the item by either selecting the drop-down arrow beside the item or clicking the hyperlink to view the item and selecting the button for the desired action.

Items to Approve

4028226 - 3

APS Case • Submitted by Anissa Laikens

▼

- Approve
- Reject
- Reassign

Approval Request
APS Case Approval Pending

Approve Reject Reassign

Submitter	Date Submitted	Actual Approver	Assigned To
Anissa Laikens	Jun 7, 2022	Tracy Pena	Tracy Pena

Details

Approval Details

Case Number	Owner
4028226 - 3	Anissa Laikens
Case Decision Due Date	Client Name
6/25/2022	Deanna Jones
Extension Reason	
need more time.	

Submitter Comments

 [Anissa Laikens](#)
need more time.
Jun 7, 2022 1:47:15 PM

APS Case Extension

If rejecting the request, the supervisor can enter a comment and click reject. A **green** message will appear if the rejection is successful.

Reject APS Case

Comments

You messed up|

Cancel

Reject



APS Case was rejected.



APS Case Extension

The extension request status will change from submitted to rejected. Once rejected, the item will be available for worker review.

	APS Case 4028226 - 3
▼ Case Decision Information	
Case Decision Due Date	6/25/2022
Case Decision	
Case Decision Date/Time	
Case Decision Reason	
Closure Reason	
Case Closure Summary 	
Ongoing Alleged Perpetrator Involvement? 	
Case Decision Approval Status	
Case Plan Date Timely	
Extension Request	Rejected
Extension Reason	need more time.

APS Case Extension

Once the worker receives an email that the item was rejected, they can correct any issues and resubmit.

	APS Case 4028226 - 3
Case Decision Due Date	6/25/2022
Case Decision	
Case Decision Reason	
Closure Reason	
Ongoing Alleged Perpetrator Involvement?	<input type="checkbox"/>
Case Closure Summary	<input type="checkbox"/>
Case Decision Approval Status	
Case Decision Date/Time	
Extension Request Requested	<input type="checkbox"/>
Extension Reason Fixed	<input type="checkbox"/>

APS Case Extension

If the supervisor wants to reassign the approval item, they can click the reassign button, search a worker in the drop down and then click the blue reassign button.

Approval Request
APS Case Approval Pending Approve Reject Reassign

Reassign Approval Request

Reassign To



Comments

Empty text area for comments.

Cancel Reassign

APS Case Extension

Once the supervisor has reassigned the approval item to another supervisor, the approval will display the change and the supervisor comments.

The screenshot displays a web interface for an APS Case Approval. At the top, a header bar shows 'Process Instance Step' and 'APS Case Approval' with a 'Pending' status. Below this, a table lists key details: Submitter (Anissa Laikens), Date Submitted (Jun 8, 2022), Actual Approver (Tanjulla Tyson-Wearren), and Assigned To (Tracy Pena). The 'Actual Approver' and 'Assigned To' fields are highlighted with a red box. A 'Details' section on the left provides further information under 'Approval Details', including Case Number (4028226 - 3), Case Decision Due Date (6/25/2022), Extension Reason (Fixed), Owner (Anissa Laikens), and Client Name (Deanna Jones). On the right, an 'Approver Comments' section, also highlighted with a red box, shows a comment from Tracy Pena: 'Please approve this one.' dated Jun 8, 2022 2:34:00 PM.

Submitter	Date Submitted	Actual Approver	Assigned To
Anissa Laikens	Jun 8, 2022	Tanjulla Tyson-Wearren	Tracy Pena

Details

Approval Details

Case Number	4028226 - 3	Owner	Anissa Laikens
Case Decision Due Date	6/25/2022	Client Name	Deanna Jones
Extension Reason	Fixed		

Approver Comments

 **Tracy Pena**
Please approve this one.
Jun 8, 2022 2:34:00 PM

APS Case Extension

Once approved, the status will show **approved**, and the approver comments will display. The Extension Request will display as approved.

The screenshot displays the APS Case Approval interface. At the top, the process instance step is labeled 'APS Case Approval' with a status of 'Approved' highlighted in a red box. Below this, a table lists the submitter (Anissa Laikens), date submitted (Jun 8, 2022), actual approver (Tanjulla Tyson-Wearren), and assigned to (Tracy Pena). The 'Details' section is divided into 'Approval Details' and 'Approver Comments'. The 'Approval Details' section shows case number 4028226 - 3, decision due date 7/10/2022, and extension reason 'Fixed'. The 'Approver Comments' section shows a comment from Tanjulla Tyson-Wearren: 'Good to go.' dated Jun 8, 2022 2:40:52 PM. The 'Case Decision Information' section is expanded, showing fields for Case Decision Due Date (7/10/2022), Case Decision, Case Decision Reason, Closure Reason, Ongoing Alleged Perpetrator Involvement?, Case Closure Summary, Case Decision Approval Status, Case Decision Date/Time, and Extension Request (Approved), with the 'Approved' status highlighted in a red box.

Submitter	Date Submitted	Actual Approver	Assigned To
Anissa Laikens	Jun 8, 2022	Tanjulla Tyson-Wearren	Tracy Pena

Details

Approval Details

Case Number	Owner
4028226 - 3	Anissa Laikens
Case Decision Due Date	Client Name
7/10/2022	Deanna Jones
Extension Reason	
Fixed	

Approver Comments

Tanjulla Tyson-Wearren
Good to go.
Jun 8, 2022 2:40:52 PM

Case Decision Information

Case Decision Due Date	7/10/2022
Case Decision	
Case Decision Reason	
Closure Reason	
Ongoing Alleged Perpetrator Involvement?	
Case Closure Summary	
Case Decision Approval Status	
Case Decision Date/Time	
Extension Request	Approved
Extension Reason	Fixed

APS Case Extension

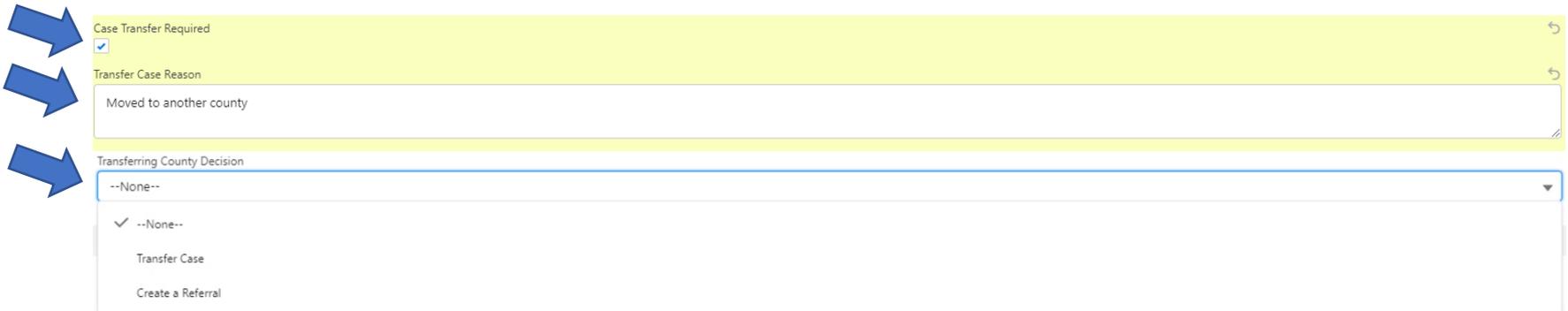
Once the request has been submitted, the Extension Request and Extension Reason will display the entered values. The approved Case Extension will display the new Case Decision Due Date.

The image shows three sequential screenshots of a 'Case Decision Information' form, connected by blue arrows pointing from left to right. Each screenshot has a red box highlighting specific fields.

- First Screenshot:** Shows the 'Case Decision Due Date' field with the value '6/24/2022' highlighted in a red box. Other fields include 'Case Decision', 'Case Decision Reason', 'Closure Reason', 'Ongoing Alleged Perpetrator Involvement?', 'Case Closure Summary', 'Case Decision Approval Status', 'Case Decision Date/Time', 'Extension Request' (value: 'Not Requested'), and 'Extension Reason'.
- Second Screenshot:** Shows the 'Extension Request' field with the value 'Requested' and the 'Extension Reason' field with the value 'Need more time.' highlighted in a red box. The 'Case Decision Due Date' is now '6/24/2022'.
- Third Screenshot:** Shows the 'Case Decision Due Date' field with the value '7/9/2022' highlighted in a red box. The 'Extension Request' field now shows 'Approved' and the 'Extension Reason' field shows 'Need more time.', both highlighted in a red box.

APS Case Transfer

If the case needs transferred, the transferring county MUST send communication to the receiving county prior to transfer to determine if they want the case transferred or if they want a new referral created. The caseworker can then select the Case Transfer Request checkbox and provide the Transfer Case Reason along with the Transferring County Decision. Either option should be documented with a case note.



The screenshot shows a form with three sections highlighted in yellow. Three blue arrows on the left point to the following elements:

- Case Transfer Required:** A checkbox that is checked.
- Transfer Case Reason:** A text box containing the text "Moved to another county".
- Transferring County Decision:** A dropdown menu with "--None--" selected. The dropdown list is open, showing the following options:
 - ✓ --None--
 - Transfer Case
 - Create a Referral

APS Case Transfer

Office of
Families and Children

Once the caseworker has entered the information, the supervisor will get an email regarding the transfer. The supervisor will open the case and click the Transfer Case button.



APS Case
4028244 - 1

Edit Close Case **Transfer Case** Generate Case File

Client Name	Case Stage	Status	Record Type
Bart Malone	Investigation	Assessment/Investigation In Process	Case

The Supervisor will get a popup box to select the county the case will be transferred to. Once the County has been selected, click the **blue** Transfer Case button.

Transfer Case



County ⓘ

Fairfield

Cancel **Transfer Case**

APS Case Transfer

On the newly created case (-2), the County and Owner will now display the new county of ownership.

 APS Case
4028244 - 2

Information

Client Name
[Bart Malone](#)

Client Mailing Address
123 Main Street, Cleveland, OH, 90210

Client's Home Phone Number

Case Number
4028244 - 2

County ⓘ
Fairfield

Owner
Fairfield County

APS Case Transfer

The original County will go the initial case (-1) and close it with the reason of "moved out of state/county".

APS Case
4028244 - 1

Case Decision Information

Case Decision Due Date
6/24/2022

Case Decision
Close Case

Case Decision Date/Time

Date Time
7/6/2022 12:00 PM

Case Decision Reason
Client resides in Fairfield County.

Closure Reason
Moved Out of State/County

[View all dependencies](#)

Case Closure Summary ⓘ
Client resides in Fairfield County.

Ongoing Alleged Perpetrator Involvement? ⓘ
No

APS Case Transfer

Office of
Families and Children

Original case will show closed and new case will show in the new County's que.

APS Case
4028244 - 1

Client Name
[Bart Malone](#)



Case Stage
Closed Case



Status
Case Closed



Record Type
Case Closed

APS Cases
All Cases-Fairfield County ▼

1 item • Sorted by Case Number • Filtered by All aps cases - County • Updated 2 minutes ago

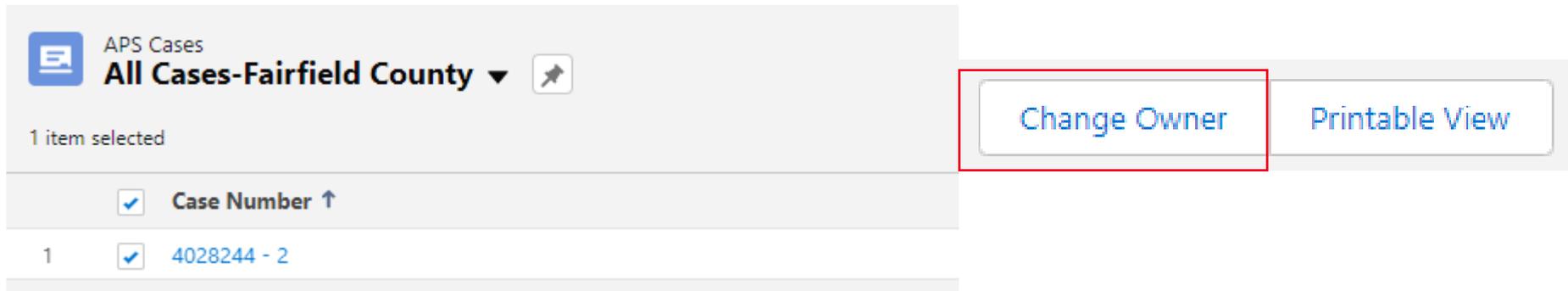
<input type="checkbox"/>	Case Number ↑
1	<input type="checkbox"/> 4028244 - 2



APS Case Transfer

Office of
Families and Children

The new County's Supervisor can select the item and click the Change Owner button to assign it to a Caseworker.



APS Cases
All Cases-Fairfield County ▾ ↗

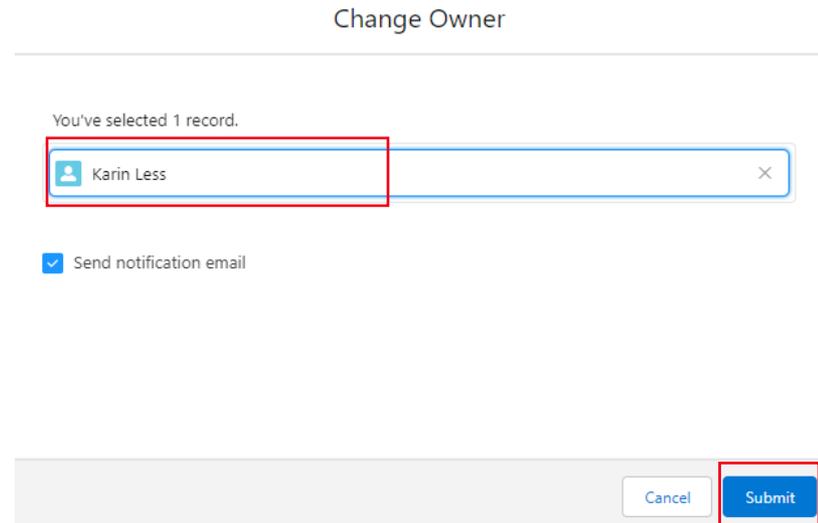
1 item selected

Case Number ↑

1	<input checked="" type="checkbox"/> 4028244 - 2
---	---

[Change Owner](#) [Printable View](#)

The supervisor can search for the Caseworker and click the blue submit button.



Change Owner

You've selected 1 record.

Send notification email

[Cancel](#) [Submit](#)

APS Case Transfer-Referral

If a referral needs transferred, the caseworker will select Create a Referral in the Transferring County Decision box to create a referral in the appropriate county.

Case Transfer Required

Transfer Case Reason
Lives in Fairfield.

Transferring County Decision
Create a Referral

The supervisor will transfer the referral to the receiving county by selecting the Transfer Case button.

APS Case
4027905 - 1

Edit Referral Screen in Screen OUT **Transfer Case** Print Referral

Client Name	Case Stage	Status	Record Type
TestEMess	Referral	New	Referral

APS Case Transfer-Referral

Office of
Families and Children

Once the transfer has been completed the supervisor on the original county's referral will select the screen out button.

APS Case
4027905 - 1

Edit Referral Screen in **Screen OUT** Transfer Case Print Referral

Client Name	Case Stage	Status	Record Type
TestEMess	Referral	New	Referral

Screen Out

* Screen Out Reason ⓘ

Referred to Appropriate Agency; APS Inappropriate

Additional Notes

Lives in Fairfield County

Cancel **Screen Out**

The supervisor will select the Screen Out Reason 'Referred to Appropriate Agency' and click the blue Screen Out button.

APS Case Transfer-Referral

The original case statuses will all display Screened Out.

APS Case 4027905 - 1

Client Name: [TestEMess](#) → Case Stage: Screened Out → Status: Screened Out → Record Type: Screened Out Referral

The receiving county supervisor can now complete the newly transferred referral and make a screening decision.

APS Case 4027905 - 2

[Edit Referral](#) [Screen in](#) [Screen OUT](#) [Transfer Case](#) [Print Referral](#)

Client Name	Case Stage	Status	Record Type
TestEMess	Referral	New	Referral

Case Review

If the investigation becomes an ongoing case, a new assessment is due every 90 days. The case review information is required at the end of each 90 Day Assessment.

Assessment

Save In Progress Assessment Complete Cancel

Details ADLs/IADLs Cognition Behavioral Medical Home/Residence Financial Maltreatment Support Services Caregiver/Perpetrator Case Review - Only for 90 Day Assessments

Details

APS Case Number

4028141 - 1

Date You Began Assessment in the Field

Jun 27, 2022

Assessment Type

90 Day Assessment

Save In Progress Assessment Complete Cancel

APS Case Decision-Close

When the case is ready for decision, either to open for ongoing services, court ordered services or to close the case, a case decision must be selected from the dropdown and a case decision reason entered.

Case Decision Information

Case Decision Due Date
3/10/2022

Case Decision

--None--

✓ --None--

Open for Ongoing Services

Close Case

Open - Court Ordered Services

Closure Reason

--None--

[View all dependencies](#)

Ongoing Alleged Perpetrator Involvement? ⓘ

--None--

Case Closure Summary ⓘ

close

Closure Reason

✓ --None--

Adult Refuses Services

Allegations Not Validated No Other Needs

Allegations Resolved and No Other Need

APS Intervention Complete

Assessment determined not an at-risk adult

Client Incarcerated

Death - After APS Response

Death - Prior to APS Response

Moved Out of State/County

Refused Contact

Ongoing Alleged Perpetrator Involvement? ⓘ

✓ --None--

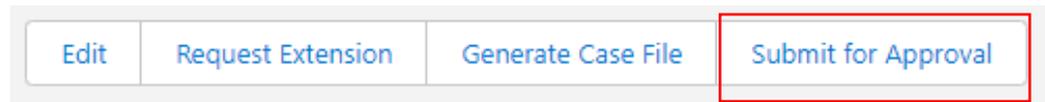
Yes

No

N/A

APS Case Decision-Close

Once all your case decision information has been completed, click the Save button and Submit you Case Decision for Approval.



Case Decision Information

Case Decision Due Date
3/10/2022

Case Decision
Close Case

Case Decision Reason
Close

Closure Reason
Moved Out of State/County
[View all dependencies](#)

Ongoing Alleged Perpetrator Involvement? ⓘ
No

Case Closure Summary ⓘ
close

You will get a **green** validation message once you have successfully submitted for approval



Please note: The only time an Assessment is not required prior to closing is when the reason for closure is: Unable to Locate, Refused Contact, Death Prior to APS Response or Moved Out of State/County.

APS Case Decision-Close

Once the supervisor has approved the Case Closure, the Case Stage, Status and Record Type will all display as Closed.

 APS Case 4028157 - 1			
Client Name	Case Stage	Status	Record Type
George Jetson	Closed Case	Case Closed	Case Closed

APS Case Decision-Ongoing Services

To open a case under Ongoing Services, select the Case Decision and the Case Decision Reason. Click Save. Then click the Submit for Approval button. Please note, once the case is in Ongoing Services, you will be required to complete a Case Plan within 30 days. Also, while a case is in Ongoing Services, you will be required to complete an Assessment every 90 days.

Case Decision Information

Case Decision Due Date
3/10/2022

Case Decision
Open for Ongoing Services

Case Decision Reason
Client needs further assistance

Closure Reason
--None--

[View all dependencies](#)

Ongoing Alleged Perpetrator Involvement? ⓘ
--None--

Case Closure Summary ⓘ
|

Case Decision Approval Status

Once you have successfully submitted for approval, you get a green validation message



APS Case Decision-Ongoing Services

Once submitted the supervisor can review the case decision approval request and either Approve, Reject or Reassign the item.

Approval Request
APS Case Approval Pending

Approve Reject Reassign

Submitter	Date Submitted	Actual Approver	Assigned To
Anissa Laikens	Jun 29, 2022	Tracy Pena	Tracy Pena

Details

Approval Details

Case Number 4027932 - 1	Owner Anissa Laikens
Client Name Bob Barker	Case Decision Open for Ongoing Services
Case Decision Reason Client needs further assistance	Maltreatment Category ⓘ Exploitation:Physical Abuse

Submitter Comments

[Anissa Laikens](#)
Open please
Jun 29, 2022 3:26:13 PM

If approved, the Case Stage will now display as an Ongoing Case.

APS Case
4027932 - 1

Client Name Bob Barker	Case Stage Ongoing Case	Status Assessment/Investigation In Process	Record Type Case
---	----------------------------	---	---------------------

APS Case Decision-Ongoing Services

Office of
Families and Children

If the supervisor rejects the Case Decision, they can enter a comment before clicking the blue Reject button.

Reject APS Case

Comments

Fix things

Cancel Reject

After clicking the Reject button, the Approval will display as rejected and comments will appear in the Approver Comments box.

Process Instance Step
APS Case Approval Rejected

Submitter	Date Submitted	Actual Approver	Assigned To
Anissa Laikens	Jun 29, 2022	Tracy Pena	Tracy Pena

Details

Approval Details

Case Number 4027932 - 1	Owner Anissa Laikens
Client Name Bob Barker	Case Decision Open for Ongoing Services
Case Decision Reason Client needs further assistance	Maltreatment Category ⓘ Exploitation:Physical Abuse

Approver Comments

 [Tracy Pena](#)
Fix things
Jun 30, 2022 11:01:25 AM

APS Case Decision-Ongoing Services

Once the item has been rejected, the rejected item's status can be found on the Related tab of the Case Details page.

Details **Related**

Approval History (6+)

Step Name	Date	Status	Assigned To
Step 1	6/30/2022 11:01 AM	Rejected	Tracy Pena
Approval Request Submitted	6/29/2022 3:26 PM	Submitted	Anissa Laikens

If the supervisor reassigns the Case Decision, they can search and select the new supervisor and enter a comment before clicking the blue Reassign button.

Once you have successfully submitted for approval, you get a green validation message



Reassign Approval Request

* Reassign To

Tanisha Harry

Comments

Please approve for me!

Cancel Reassign

✓ APS Case was reassigned.

APS Case Decision-Ongoing Services

The reassigned item will now display as pending and the Actual Approver will display as the newly selected supervisor and the comments from the original Approver. ***reassigned approval not showing on Tanisha's home page, no approval section for her at all***

The screenshot shows the APS Case Approval interface. At the top, the process instance step is 'APS Case Approval' with a 'Pending' status. A red box highlights the 'Pending' status, and a red arrow points from it to the 'Actual Approver' field. The 'Actual Approver' field is also highlighted with a red box and contains the name 'Tanisha Harry'. Other fields include 'Submitter: Anissa Laikens', 'Date Submitted: Jun 30, 2022', and 'Assigned To: Tracy Pena'. Below the main header, there is a 'Details' section with 'Approval Details' and 'Approver Comments'. The 'Approval Details' section includes fields for Case Number (4027932 - 1), Client Name (Bob Barker), Case Decision Reason (Client needs further assistance), Owner (Anissa Laikens), Case Decision (Open for Ongoing Services), Maltreatment Category (Exploitation:Physical Abuse), and a comment from Tracy Pena: 'Please approve for me. Jun 30, 2022 11:55:59 AM'. The 'Approver Comments' section is also highlighted with a red box.

Submitter	Date Submitted	Actual Approver	Assigned To
Anissa Laikens	Jun 30, 2022	Tanisha Harry	Tracy Pena

Details

Approval Details

Case Number	4027932 - 1	Owner	Anissa Laikens
Client Name	Bob Barker	Case Decision	Open for Ongoing Services
Case Decision Reason	Client needs further assistance	Maltreatment Category	Exploitation:Physical Abuse

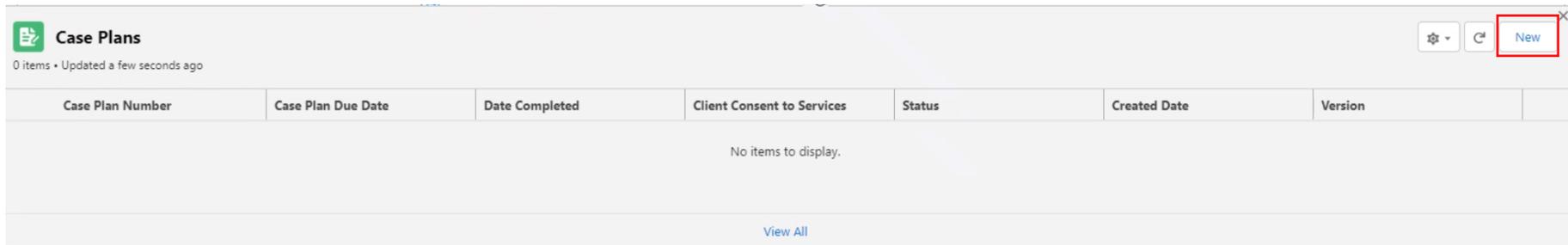
Approver Comments

Tracy Pena	Please approve for me.
	Jun 30, 2022 11:55:59 AM

APS Case Plan

Office of
Families and Children

A Case Plan is due within the first 30 days of a case stage going to Ongoing Services. To create a Case Plan, select the new button.



The screenshot shows a web interface for 'Case Plans'. At the top left, there is a green icon and the text 'Case Plans'. Below this, it says '0 items • Updated a few seconds ago'. On the right side, there are three buttons: a settings gear icon, a refresh icon, and a 'New' button which is highlighted with a red box. Below the buttons is a table with the following columns: 'Case Plan Number', 'Case Plan Due Date', 'Date Completed', 'Client Consent to Services', 'Status', 'Created Date', and 'Version'. The table is currently empty, displaying the message 'No items to display.' at the bottom center. At the very bottom of the interface, there is a 'View All' link.

Case Plan Number	Case Plan Due Date	Date Completed	Client Consent to Services	Status	Created Date	Version
No items to display.						

[View All](#)

APS Case Plan

Office of
Families and Children

A new Case Plan popup window will appear. To create the Case Plan, click the **blue** save button. Once successful, you will receive a **green** validation message.

New Case Plan: Case Plan

Case Plan Details

* APS Case Number

4028237 - 1

Version

1

Client Name

This field is calculated upon save

Status

In-Progress

Client Consent to Services

--None--

of Not Yet Implemented Client Services

0

This field is calculated upon save

Total Client Services Funds Amount ⓘ

\$0.00

This field is calculated upon save

Significant Impact Risk Factors

Client's Annual Income ⓘ

--None--

Minor Impact Risk Factors

Additional Income Information



✓ Case Plan "CP-00007566" was created. ✕

Cancel

Save & New

Save



APS Case Plan

Office of
Families and Children

Once you save, you'll be directed to the Case Plan Details page. This details page will show the identified risk factors in which you will develop needed services.

Case Plan
CP-00007566

Edit Amend Case Plan Print Case Plan Submit for Approval

Details Related

Case Plan Details

APS Case Number	4028237 - 1	Version	1
Client Name	Homer Simpson	Status	In-Progress
Client Consent to Services		# of Not Yet Implemented Client Services	0
Total Client Services Funds Amount	\$0.00	Significant Impact Risk Factors	Having Adequate Income, Unpaid Bills, Uses Income/Assets to Meet Basic Needs, Ability to Access Funds and Financial Information, Adequate Health Care Coverage, Change in Financial Circumstances, Compulsive Behavior, Delusions,
Client's Annual Income	\$25,000-\$49,999	Minor Impact Risk Factors	Planning and Sequencing, Receiving and Evaluating Information, Recognizing Basic Needs, Short or Long-Term Memory Issues, Awareness of Consequences of Actions/Choices, Requires Prompting, Illegal or Unsafe Activity in the home,
Additional Income Information			

APS Case Plan

Office of
Families and Children

To add Case Services, select the Related tab and then the New button.

The screenshot displays the APS Case Plan interface. At the top left, there is a green icon and the text "Case Plan CP-00007566". To the right of this are four buttons: "Edit", "Amend Case Plan", "Print Case Plan", and "Submit for Approval" with a dropdown arrow. Below this is a "Details" section with a tab labeled "Related" which is underlined and highlighted with a red box. Below the "Details" section is a "Client Services (0)" section with a red bell icon. In the bottom right corner of this section, there is a "New" button highlighted with a red box.

APS Case Plan

A popup window will appear with the new Case Plan fields. Required fields are identified with a *. The Concerns are related to your assessment risk factors and are identified on your details tab. Select the appropriate Concern, Service Type and Service Need.

Information

Client Name ⓘ

* Case Plan ⓘ

CP-00007566

Concern

--None--

✓ --None--

ADLs/IADLs

Cognition

Behavioral Concerns

Medical Status

Home / Residence

Financial Circumstances

Maltreatment

Support Services

Caregiver/Perpetrator

* Concern Summary

* Service Type

--None--

✓ --None--

Case Management/Evaluation (BH/IDD/TBI)

Education/Support Groups

Financial Need/Public Assistance

Housing

In Home/Community Services

Legal Intervention and Documents

Medical Needs/Insurance

Nutrition

Service Need ⓘ

--None--

[View all dependencies](#)

Service Need will be based on what Service Type is selected.

APS Case Plan

Identify the Service Status and the Person Arranging Service. If the services are being arranged by someone other than county staff, be sure to indicate if they agree to arrange services.

*Service Status

Need Identified, Not yet implemented

--None--

Client not eligible

Client on Waitlist

Service Arranged

Service Arranged - Client Uncooperative

Service Arranged - Involuntary

Service Not Available

Service Refused

✓ Need Identified, Not yet implemented

Person Arranging Service ⓘ

--None--

✓ --None--

County

Other Agency

Support

Name of person/agency arranging service

Other person agrees to arrange service?

--None--

✓ --None--

Yes

No

APS Case Plan

You can enter Service Start Date when the services begin and enter the Service End Date and Service End Reason upon ending the service.

Service Start Date 

Service End Date  

Service End Reason 

- None--
- ✓ --None--
- Client Revoked Consent
- Client Resistant to Service Delivery
- Provider Safety Concerns
- Service Complete
- Service Ineffective
- Other

APS Case Plan

Office of
Families and Children

Once you have completed all the fields and click the **blue** Save button, you have successfully completed a Client Service. You will get a **green** validation message. If you haven't completed all required fields, you will receive a **red** error message with details instructing you what to fix.



Client Services "a0GBZ000001RU5O2AW" was created.



New Client Services: Service Type Record Type

Information

Client Name

* Service Status
Need Identified, Not yet implemented

* Case Plan
CP-00007566

* Concern
Home / Residence

* Concern Summary
Homer cannot keep his home clean and is a borderline hoarder.

* Service Type
In Home/Community Services

* Service Need
Hoarding Services

Specify Other Service Need

Additional Services Information

Person Arranging Service
County

Name of person/agency arranging service
Anissa Laikens

Other person agrees to arrange service?
--None--

Service Start Date
7/18/2022

Service End Date

Service End Reason
--None--

Other Service End Reason

Cancel Save & New Save

* Service Need
--None--

Complete this field.
View all dependencies

Specify Other Service Need

Additional Services Information

Service End Date

Service End Reason
None--

Other Service End Reason

We hit a snag.
Review the following fields
• Service Need

Cancel Save & New Save

APS Case Plan

Office of
Families and Children

Once Case Plan Services are created, they can be found under Client Services on the Related tab. These services can be edited by the owner until the Case Plan is submitted for approval to their supervisor.

Case Plan CP-00007566 [Edit](#) [Amend Case Plan](#) [Print Case Plan](#) [Submit for Approval](#)

Details **Related**

Client Services (2) [New](#)

Service Number	Service Type	Service Need	Specify Other Service Need
SVC-000009412	In Home/Community Services	Hoarding Services	
SVC-000009413	Housing	Housing - Emergency	

[Edit](#)

APS Case Plan

Office of
Families and Children

Once Client Services have been identified and created, the Case Plan Dates section will need to be updated with Client Signature Date and Type. Select the **blue** Save button when finished adding the information.

Case Plan Dates

Client Signature Date

Client Signature **--None--**

- ✓ --None--
- Obtained
- Refused to Sign
- Unable to Sign – Verbal Agreement to Services
- POA/Guardian Signature Obtained
- Court Ordered Services
- Pending

Date Completed 7/12/2022

Initial Case Plan Effective Date

Case Plan End Date

Cancel Save

APS Case Plan

Office of
Families and Children

To submit for approval, select the Submit for Approval button and enter Comments in the popup box before clicking the blue Submit button.

Case Plan CP-00007566

Edit Amend Case Plan Print Case Plan **Submit for Approval**

Submit for Approval

Comments

Case Plan is complete. Please review and approve|

Cancel

Submit



Case Plan was submitted for approval.



If successful, you will receive a **green** validation message.

APS Case Plan

The Case Plan will remain locked until the Supervisor completes the approval. You can view this information on the Related tab under the Case Plan History section.

Case Plan History (6+)				
Date	Field	User	Original Value	New Value
7/11/2022 3:23 PM	Record locked.	Anissa Laikens		
7/11/2022 3:23 PM	Status	Anissa Laikens	In-Progress	Case Plan Developed
7/11/2022 3:13 PM	Status	Anissa Laikens	Case Plan Developed	In-Progress

The Caseworker will have the ability to Recall the Case Plan until the Case Plan is approved by the Supervisor.

Approval History (4)				Recall
Step Name	Date	Status	Assigned To	
Step 1	7/11/2022 3:23 PM	Pending	Tracy Pena	▼
Approval Request Submitted	7/11/2022 3:23 PM	Submitted	Anissa Laikens	▼
Step 1	7/11/2022 3:13 PM	Recalled	Tracy Pena	▼
Approval Request Submitted	7/11/2022 3:10 PM	Submitted	Anissa Laikens	▼

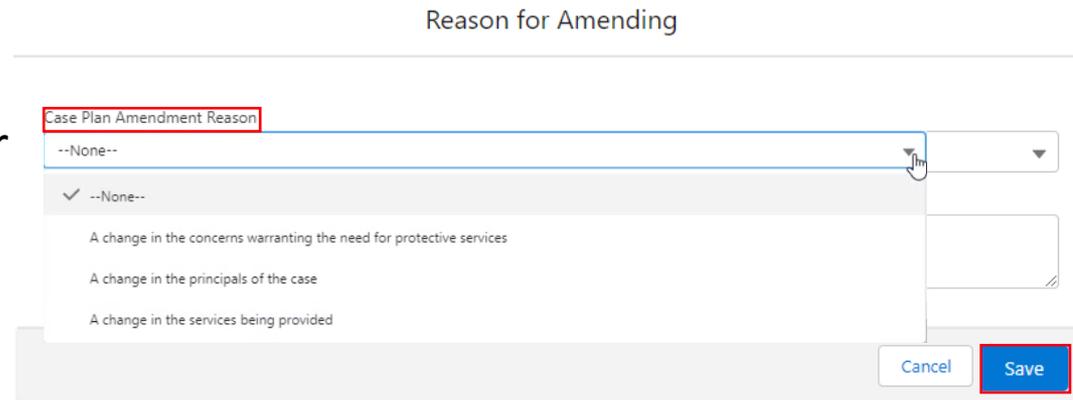
[View All](#)

APS Case Plan-Amendment

A Case Plan can be amended at any time throughout an open Case. ***Before amending your Case Plan, you must first close and end date any open Case Plan Services.*** Once the current Case Plan has been closed out and end dated, you can amend by selecting the Amend Case Plan button.



A popup box will appear. You will enter your Case Plan Amendment Reason and Explanation and select the blue Save button.



Case Process Due Dates

On the Case Details page, you can find case process due dates that will provide you a snapshot of key dates. It will also assist you in displaying the status of the timeliness of your case investigation as well as ongoing services.

Case Process Due Dates	
Initial Assessment Due Date	90 Day Assessment/Case Review Due ⓘ
4/16/2022	8/25/2022
Initial Assessment Complete Date	90 Day Assessment Completed Date
Initial Case Plan Due Date	Last Client Visit Date
Initial Case Plan Complete Date	Previous Client Visit Date
Timely Initial Response	Monthly Contact Target Date
No Response	4/17/2022
Timely Investigation	Case Plan Date Timely
Untimely	
Timely Initial Assessment	
Untimely	
Timely Initial Case Plan	
N/A	

If a case is to remain open, you can use this section to manage upcoming due dates for Case Review and monthly contact. Email alerts and tasks will also be generated.

Case Review

Office of
Families and Children

The case review information is required at the end of each 90 Day Assessment. Indicate if the case should be closed and if the case plan needs amending. After clicking the **blue** Assessment Complete button, submit for approval.

Assessment

Save In Progress Assessment Complete Cancel

Details ADLs/IADLs Cognition Behavioral Medical Home/Residence Financial Maltreatment Support Services Caregiver/Perpetrator **Case Review - Only for 90 Day Assessments**

Case Review - Only for 90 Day Assessments

Close Case?

✓ --None--
Yes
No

Amend Case Plan?

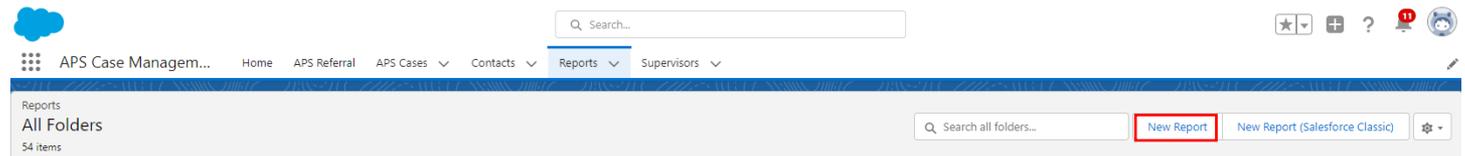
✓ --None--
Yes
No

Save In Progress Assessment Complete Cancel

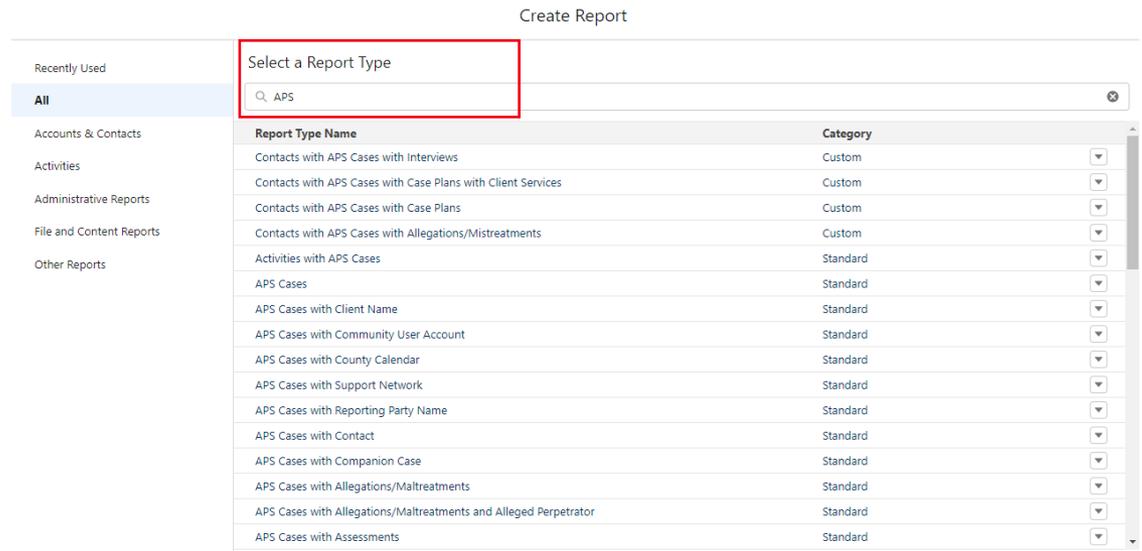
Reports

Office of
Families and Children

There are several ways to create and/or edit a report in ODAPS. To create a new report in the Lightning version, select the New Report button under the Reports tab. The reporting functionality will still be available in the Classic version.



After selecting the New Report button, a popup box will appear for you to create your new report. In the Report Type search box, type APS and then select from one of the report type names.



Reports

After selecting your report type, a details window will appear and you will select the **blue** Start Report button.

Select a Report Type

Q APS

Report Type Name	Category
Contacts with APS Cases with Interviews	Custom
Contacts with APS Cases with Case Plans with Client Services	Custom
Contacts with APS Cases with Case Plans	Custom
Contacts with APS Cases with Allegations/Mistreatments	Custom
Activities with APS Cases	Standard
APS Cases	Standard

Details

APS Cases
Standard Report Type

Start Report

Details Fields (407)

Created By You
No Reports Yet

Reports

Office of
Families and Children

After selecting the Start Report button, you will be taken to the New APS Cases Report. On this screen you will be able to add rows, columns and filters to create your report.

REPORT

New APS Cases Report

Got Feedback? Add Chart Save & Run Save Close Run

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

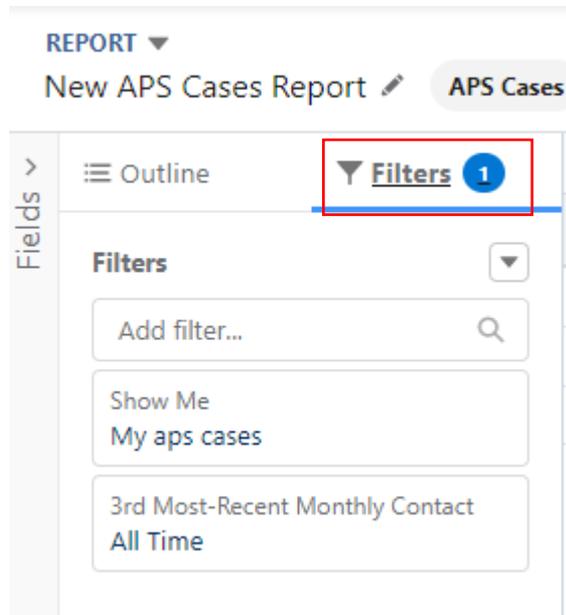
APS Case: Case Number
1 259349 - 12
2 756551 - 2
3 873912 - 1

Rows,
Columns
and Filters
oh my!



Reports

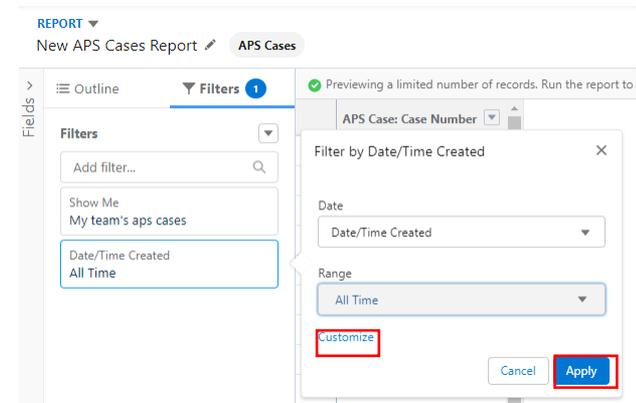
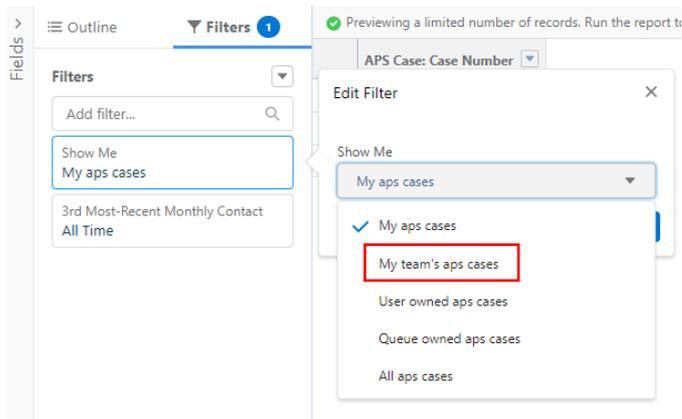
For this example, we will be creating a report for Cuyahoga county that shows the number of cases in Investigation status grouped by the Case Owner, including date/time created and investigation due dates.



To create this report, you will
Select the Filters field.

Reports

Double click on each filter to change the criteria. For this example, we will select My team's APS cases as the filter criteria. This will pull all Cuyahoga cases grouped by the Case Owner and assigned to the Supervisor creating the report. The secondary filter will be Date/Time Created. The customize hyperlink can be selected to enter a to/from date range.



Reports

To add the County filter, type county in the Add filter search and select the County option from the list below. A new filter box will pop up and allow you to enter your County name. When complete, select the blue Apply button.

The screenshot shows the 'New APS Cases Report' interface. The 'Filters' panel on the left contains an 'Add filter...' search box, 'Show Me My team's aps cases', 'Date/Time Created All Time', and a 'County' filter box. A 'Filter by County' dialog box is open, showing 'Operator equals' and 'cuyahoga' in the input field. A red arrow points to the 'Apply' button in the dialog box.

APS Case: Case Number
1 3895166 - 1
2 3901492 - 1

This is what the finished Filters window will look like for our example. You can always add or delete filters based on your need.

The screenshot shows the finished 'Filters' window. The 'County' filter is now listed as 'County equals cuyahoga'. A blue arrow points to the 'Filters' panel.

Reports

To add Groups and Columns to your report, select Outline. The Groups and Columns search boxes will be displayed. For this example, the report will be grouped by Case Owner. The Columns added will be Case Number, Case Stage, Referral Submitted Date/Time, Initiation Due Date/Time and Timely Initial Response.

Please note: each time you add a filter, group or column, the report will update in real time as long as the Update Preview Automatically selector is enabled.

Reports

To save your report, you can select either Save & Run or Save. Once either option has been selected, you will be prompted to name your report and select a folder.



Save Report

Report Name

Cuyahoga Initiation Timeliness

Report Unique Name ⓘ

Cuyahoga_Initiation_Timeliness

Report Description

Timely initiation by case worker.

Folder

Private Reports

Select Folder

Cancel

Save

Reports

Select the desired folder in which you want your report to be saved and select the Save button.

Select



All Folders

Search folders...

All Folders	▶	Folder *County APS Reports	▶
Created by Me	▶	Folder *State APS Reports	▶
Shared with Me	▶	Folder Drawloop Reports	▶
Private Reports	▶	Folder Sales and Marketing Reports	▶
Public Reports	▶	Folder Service Dashboards Reports	▶

Cancel Save

Reports

To run the report and export the details into an Excel spreadsheet, select Run.

REPORT ▾
Cuyahoga Initiation Timeliness APS Cases

Got Feedback? Save & Run Save ▾ Close **Run**

Update Preview Automatically

Fields > Outline Filters 3

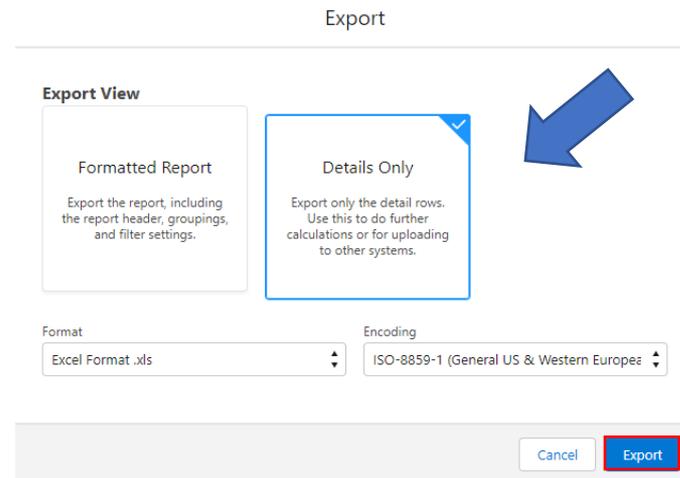
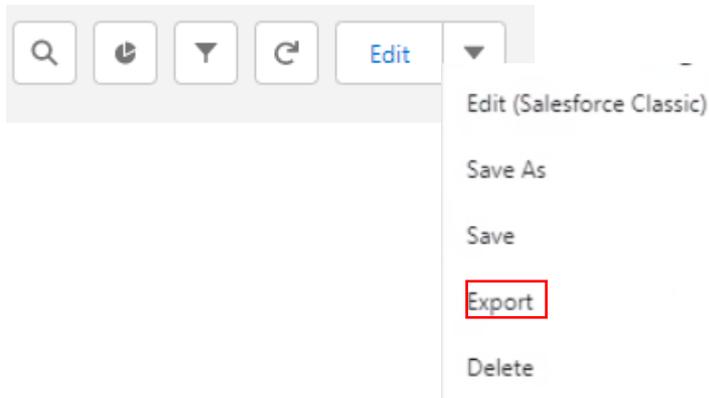
Previewing a limited number of records. Run the report to see everything.

APS Case: Owner Name	APS Case: Case Number	Case Stage	Referral Submitted Date/Time	Initiation Due Date/Time	Timely Initial Response
Anissa Laikens (1)	3969789 - 1	Investigation	1/3/2022 12:35 PM	1/6/2022 12:35 PM	No Response
Subtotal					
Ernese Williams-Akram (6)	941504 - 1	Investigation	12/6/2021 2:21 PM	12/9/2021 2:21 PM	Timely
	3948131 - 1	Investigation	12/9/2021 10:33 AM	12/14/2021 10:33 AM	Timely
	3952852 - 1	Investigation	12/14/2021 1:34 PM	12/17/2021 1:34 PM	Timely
	785257 - 2	Investigation	12/20/2021 4:33 PM	12/23/2021 4:33 PM	No Response
	3955080 - 1	Investigation	12/16/2021 1:12 PM	12/21/2021 1:12 PM	Timely
	3955477 - 1	Investigation	12/17/2021 3:52 PM	12/22/2021 3:52 PM	Timely
Subtotal					
Mary Blinas (10)	3898794 - 1	Investigation	10/12/2021 11:36 AM	10/15/2021 11:36 AM	Timely

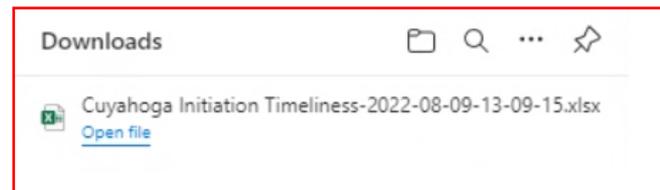
Columns: APS Case: Case Number, Case Stage, Referral Submitted Date/Time, Initiation Due Date/Time, Timely Initial Response

Reports

After running the report, select the dropdown arrow beside Edit and select Export. An Export view box will appear, change the view to Details Only and select the **blue** Export button.



Your report will display in the downloads in the top right corner. Select Open file to view your newly created report in Excel.



Reports

Once you have opened the Excel report, you can filter the information by selecting the down arrow next to each column heading.

A	B	C	D	E	F
APS Case: Case Numb	Case Stag	Referral Submitted Date/Tin	Initiation Due Date/Tin	Timely Initial Respon	APS Case: Owner Nam
3969789 - 1	Investigation	1/3/2022 12:35	1/6/2022 12:35	No Response	Anissa Laikens
3967678 - 1	Investigation	1/3/2022 16:19	1/6/2022 16:19	No Response	Anissa Laikens
379049 - 2	Investigation	1/3/2022 13:52	1/6/2022 13:52	No Response	Anissa Laikens
3969560 - 1	Investigation	1/3/2022 10:58	1/6/2022 10:58	No Response	Anissa Laikens
3968639 - 1	Investigation	1/3/2022 15:13	1/6/2022 15:13	No Response	Anissa Laikens
3970636 - 2	Investigation	8/4/2022 14:24	8/9/2022 14:24	Timely	Anissa Laikens
3970759 - 1	Investigation	7/29/2022 14:24	8/3/2022 14:24	No Response	Anissa Laikens
3970343 - 1	Investigation	1/21/2022 10:17	1/26/2022 10:17	No Response	Anissa Laikens
3970374 - 2	Investigation	3/29/2022 12:31	4/1/2022 12:31	Timely	Anissa Laikens
3970664 - 1	Investigation	7/20/2022 14:55	7/25/2022 14:55	No Response	Anissa Laikens
1031523 - 1	Investigation	8/11/2021 10:22	8/16/2021 10:22	Untimely	April Hill-Jackson
1034964 - 1	Investigation	8/17/2021 16:21	8/20/2021 16:21	Timely	April Hill-Jackson
320136 - 3	Investigation	8/18/2021 14:45	8/23/2021 14:45	Untimely	April Hill-Jackson
947548 - 2	Investigation	8/20/2021 15:04	8/25/2021 15:04	Timely	April Hill-Jackson
1038978 - 1	Investigation	8/25/2021 11:13	8/30/2021 11:13	Timely	April Hill-Jackson
1042896 - 1	Investigation	9/1/2021 10:46	9/7/2021 10:46	Timely	April Hill-Jackson
977271 - 2	Investigation	9/15/2021 15:13	9/20/2021 15:13	Timely	April Hill-Jackson
3885918 - 1	Investigation	9/27/2021 11:37	9/30/2021 11:37	Untimely	April Hill-Jackson
1029137 - 1	Investigation	8/6/2021 12:16	8/11/2021 12:16	Timely	April Hill-Jackson
881628 - 5	Investigation	8/4/2021 12:28	8/9/2021 12:28	Timely	April Hill-Jackson

Reports

Many existing reports can be found in the folders listed below. To customize an already existing report, select All Reports and then select a desired report. Be sure to use search functionality with key words in the search box to find a report with similar information you can customize. In this example, we are selecting the All Reports under the Reports section, searching the key word “screening” and selecting the Referrals by Screening Decision under the report name.

Reports
All Reports
6 items

Q screening | [New Report](#) | [New Report \(Salesforce Classic\)](#) | [New Folder](#) | ⚙

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	All Time Screening Report	Screening report from 11/2017 - 03/2021 including county	*State APS Reports	Brianne Perry	3/24/2021, 10:50 AM	▼
Created by Me	Carroll Co. Screening Report	2020	*County APS Reports	Brianne Perry	4/29/2021, 2:06 PM	▼
Private Reports	Lucas County screening	time difference between creation of referral and screening	*County APS Reports	Brianne Perry	2/19/2020, 10:18 AM	▼
Public Reports	Ottawa Screening	Screening report for Ottawa county	*State APS Reports	Lesley Biesk	5/24/2021, 11:48 AM	▼
All Reports	Referrals by Screening Decision	9/12/19	*State APS Reports	APS Service Account	10/3/2017, 8:16 AM	▼
FOLDERS	Scioto Screening	Yearly report	*State APS Reports	Lesley Biesk	5/27/2021, 8:21 AM	▼

Reports

Once the report has been opened, select the Edit button to begin customizing the report. After selecting edit, you will be able to add or delete any Columns, Rows and/or Filters.

Report: APS Cases with Client Name
Referrals by Screening Decision
9/12/19

Total Records
17

	APS Case: Case Number	APS Case: Record Type	Maltreatment Category	Referral Source	Referral Submitted Date/Time
1	3970374 - 2	Case	No Maltreatment	-	3/29/2022 12:31 PM
2	3970759 - 1	Case	Neglect	-	7/29/2022 2:24 PM
3	3970759 - 2	Case	Neglect	-	7/29/2022 2:24 PM

Reports

For this example, screenshot 1 displays what the filters were on the original report and screenshot 2 displays what we edited it to.

1

REPORT ▾
Referrals by Screening Decision ✎

Fields > Outline Filters 1

Filters ▾

Add filter... 🔍

Show Me
All aps cases

Date/Time Created
This Month (Aug 1, 2022 - Aug 31, 2022)



2

REPORT ▾
Referrals by Screening Decision ✎

Fields > Outline Filters 2

Filters ▾

Add filter... 🔍

Show Me
All aps cases

Date/Time Created
May 1, 2021 - May 31, 2021

County
equals cuyahoga 🗑️

Reports

For this example, screenshot 1 displays what the Outline was on the original report and screenshot 2 displays what we edited it to, including grouping rows by screening decision. After all edits have been made, select the blue run button.

1

REPORT Referrals by Screening Decision APS Cases with Client Name

Got Feedback? Add Chart Save Close Run

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

APS Case: Case Number	APS Case: Record Type	Maltreatment Category	Referral Source	Referral Submitted Date/Time
3970374 - 2	Case	No Maltreatment	-	3/29/2022 12:31 PM
3970759 - 1	Case	Neglect	-	7/29/2022 2:24 PM
3970759 - 2	Case	Neglect	-	7/29/2022 2:24 PM
3970759 - 2	Case	Neglect	-	7/29/2022 2:24 PM
3970759 - 2	Case	Neglect	-	7/29/2022 2:24 PM
3970682 - 2	Case	Exploitation	-	8/1/2022 2:34 PM
3970636 - 2	Case	Physical Abuse	-	8/4/2022 2:24 PM
3970636 - 3	Case	Physical Abuse	-	8/4/2022 2:24 PM
3970682 - 2	Case Closed	Exploitation	-	8/1/2022 2:34 PM
353797 - 2	Case Closed	Neglect	-	8/3/2022 12:44 PM
3970676 - 1	Case Closed	Physical Abuse	-	7/4/2022 10:22 AM
3970682 - 1	Referral	Exploitation	-	8/1/2022 2:34 PM

Outline Filters

Groups

GROUP ROWS

Add group...

Columns

Add column...

APS Case: Case Number

APS Case: Record Type

Maltreatment Category

Referral Source

Referral Submitted Date/Time

2

REPORT Referrals by Screening Decision APS Cases with Client Name

Got Feedback? Add Chart Save Close Run

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Screen In/Out Summary	APS Case: Case Number	Referral Submitted Date/Time
Screened In (12)	417805 - 2	5/11/2021 7:18 PM
	967885 - 1	5/3/2021 10:24 AM
	968043 - 1	5/3/2021 11:42 AM
	968069 - 1	5/3/2021 9:31 PM
	968078 - 1	5/3/2021 11:05 AM
	845053 - 2	5/3/2021 12:14 PM
	906995 - 3	5/3/2021 2:30 PM
	968654 - 1	5/3/2021 3:49 PM
	953389 - 2	5/4/2021 9:52 AM
	897974 - 2	5/4/2021 11:10 AM
	969240 - 1	5/4/2021 11:08 AM
	421173 - 2	5/4/2021 3:58 PM
Subtotal		
Screened Out (8)	968100 - 1	5/3/2021 2:35 PM

Outline Filters

Groups

GROUP ROWS

Add group...

Screen In/Out Summary

GROUP COLUMNS

Add group...

Columns

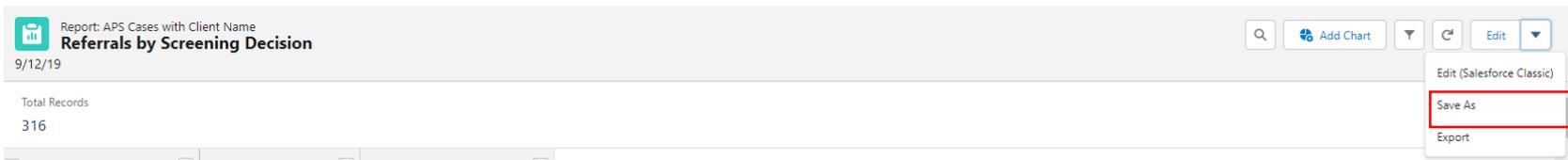
Add column...

APS Case: Case Number

Referral Submitted Date/Time

Reports

After the report is ran, click the dropdown arrow beside edit and select “Save As” and complete the Report Name, Description and what folder you want the report saved.



Report: APS Cases with Client Name
Referrals by Screening Decision
9/12/19

Total Records
316

Search Add Chart Edit

Edit (Salesforce Classic)
Save As
Export

Save Report As

* Report Name
Cuyahoga Referrals by Screening Decision

Report Unique Name ⓘ
Cuyahoga_Referrals_by_Screening_Decision_2CC

Report Description
May 2021

Folder
Private Reports Select Folder

Cancel Save

Reports

After the report is saved, your customized report can be found in Report link where you saved it. In this example, it was saved under the Private Reports.

Reports

Private Reports

2 items

Q Search private reports... [New Report](#)

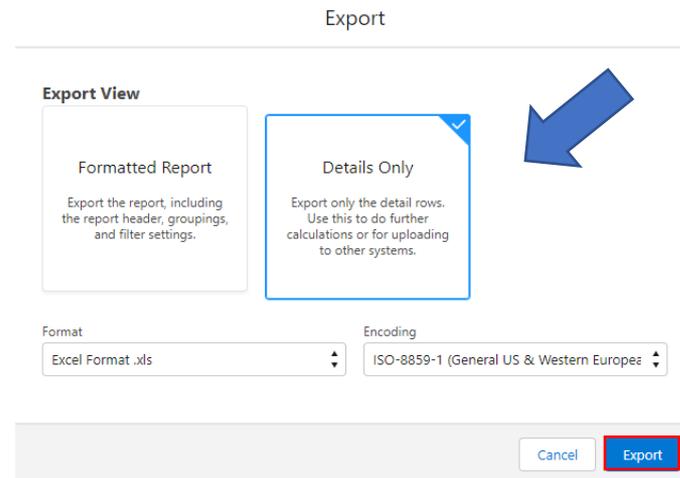
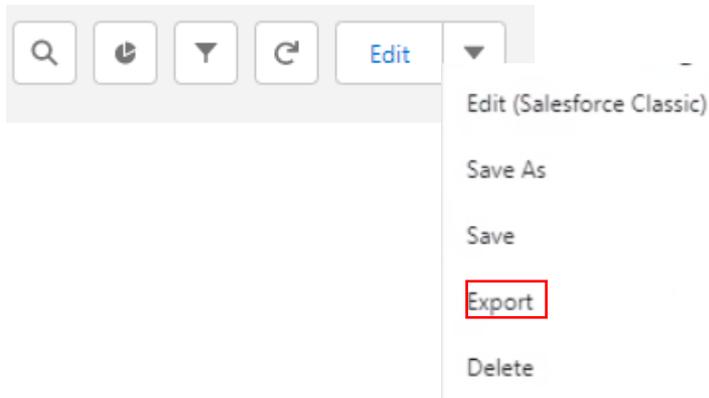
REPORTS	Report Name	Description	Folder	Created By	Created On
Recent	Cuyahoga Initiation Timeliness	Timely initiation by case worker.	Private Reports	Tracy Pena	8/9/2022, 12:44 PM
Created by Me	Cuyahoga Referrals by Screening Decision	May 2021	Private Reports	Tracy Pena	8/10/2022, 12:01 PM

Private Reports

Public Reports

Reports

After running the report, select the dropdown arrow beside Edit and select Export. An Export view box will appear, change the view to Details Only and select the **blue** Export button.



Your report will display in the downloads in the top right corner. Select Open file to view your newly created report in Excel.

