

# **Creating a Youth Navigator Intake**



**Knowledge Base Article**

# Creating a Youth Navigator Intake

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# Creating a Youth Navigator Intake

## Overview

This article describes the steps for recording a Youth Navigator Intake. An Intake documents a request or referral for Youth Navigator Network services and is the first step to opening a Case in Ohio SACWIS.

(For steps to record a Post Emancipation – Young Adult Services Intake for services through a Public Children Services Agency, please refer to the article, [Creating and Linking a Young Adult Services Intake.](#))

## Creating a Youth Navigator Intake

From the SACWIS Home Screen:

1. Click the **Intake** tab.



The **Intake Workload** screen appears.

2. Click **Add Intake**



The **Intake Workspace** screen appears.

**Note:** The **Received Date and Time** will automatically be set to the time the Intake was created. It may be changed if the Intake is being entered later.

The **Method** field defaults to Phone, but it may be changed by selecting an option from the drop-down, as needed.

3. Click **Scripts & Templates** (optional).

# Creating a Youth Navigator Intake

Intake Workspace

INTAKE ID: 22392317    INTAKE STATUS: Pending    DATE/TIME CREATED: 08/26/2022 11:54 AM    INTAKE CATEGORY:    INTAKE TYPES:

Received: \*    Method: \*    Screener: / Claimed:

08/26/2022    11:54 AM    Phone

✓ ABC    **Scripts & Templates**

Intake Narrative: \* (Expand view)    20000

Reporter: Basic    Participants

Reporters

No reporters have been added yet.

Add Reporter

Intake Status: Pending    Apply    Save    Cancel

The **Scripts & Templates** screen appears, with Youth Navigator Network selected in the **Select template option** dropdown.

4. Click the **Youth Navigator** drawer.

✓ ABC    **Scripts & Templates**    ✕

Intake Narrative: \* (Expand view)    20000

Select template option: Youth Navigator Network    Policy References

Youth Navigator Network

Select All    Copy Selected to Narrative

Bridges/YAS/Post Emancipation Services

**YouthNavigator**

The drawer expands to show a list of guiding questions for the narrative related to Youth Navigator Network. You can copy the questions into the **Intake Narrative** field, if desired, following the steps below.

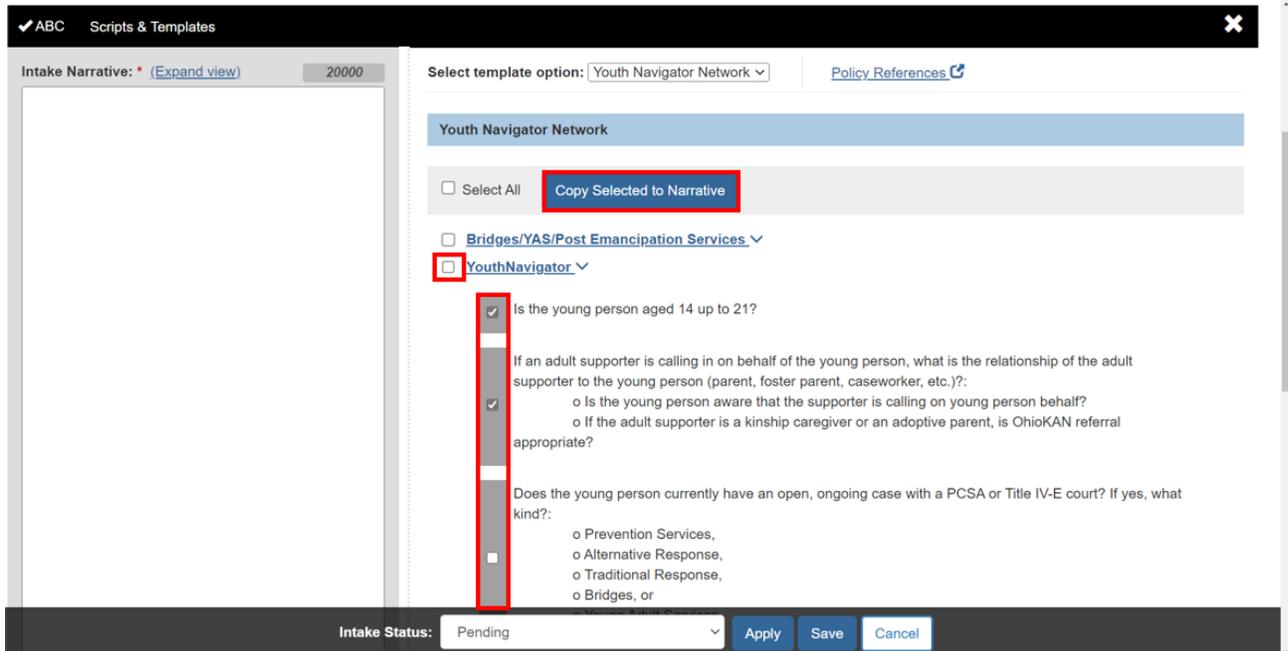
**Note:** The **Intake Narrative** is where the details about the referral or request for services are documented. The Intake Narrative remains fully editable and accessible on all screens while the Intake is in Pending status.

5. Click the **checkbox** beside each question you wish to copy to the **Intake Narrative**.

**Note:** To select all the questions in the list at once, click the checkbox beside the **Youth Navigator** drawer.

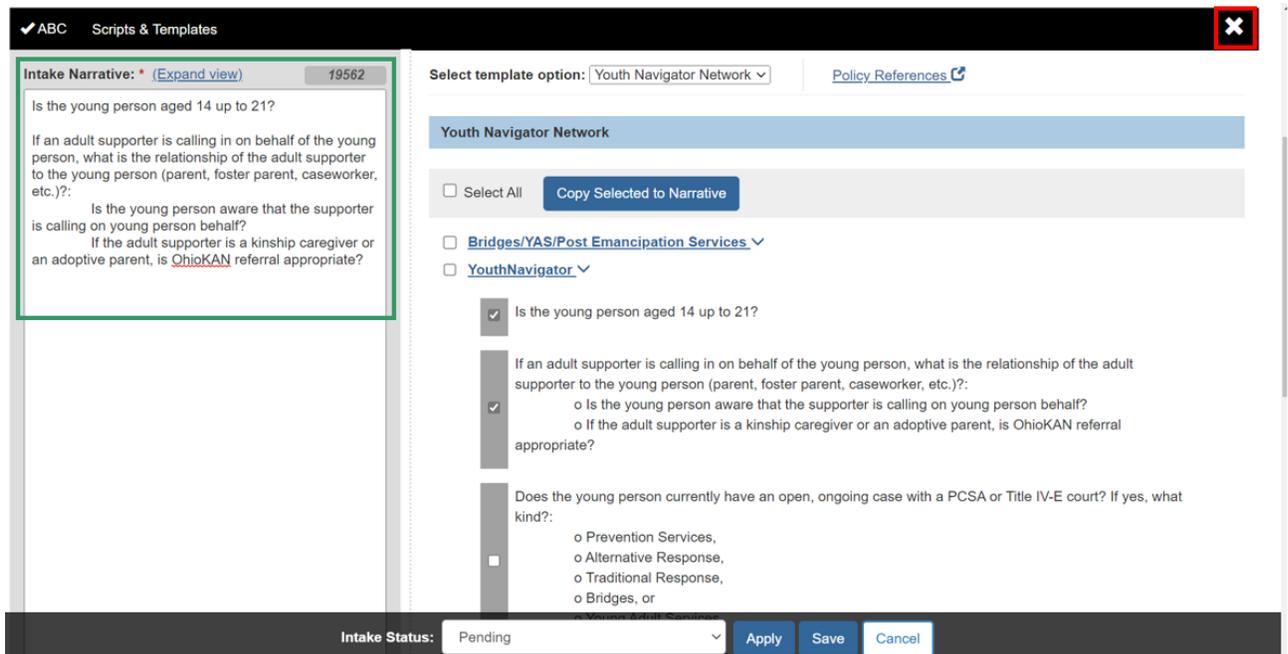
6. Click **Copy Selected to Narrative**.

# Creating a Youth Navigator Intake



The selected questions appear in the **Intake Narrative** field.

7. Click the “x” on the right side of the section header to close the **Scripts & Templates** screen and return to the tab view.



The **Intake Workspace** screen appears with the tabs in view.

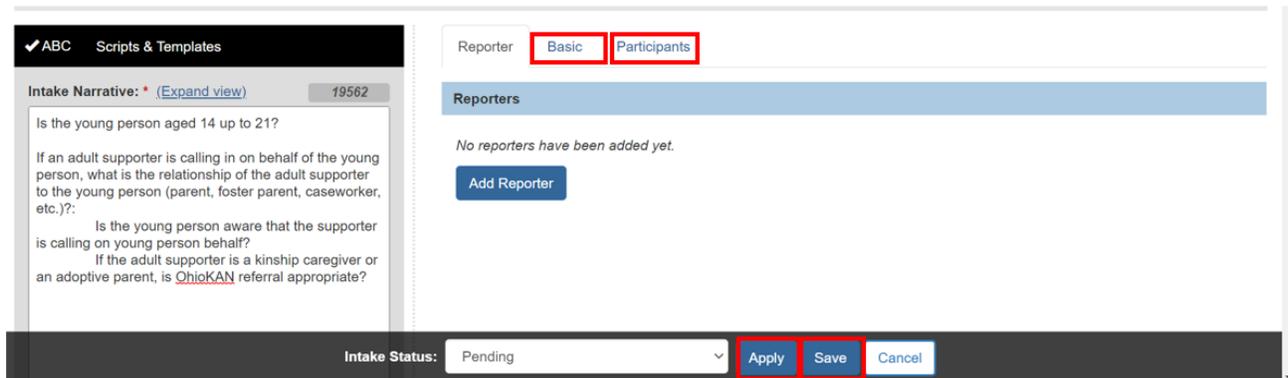
## Creating a Youth Navigator Intake

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

- Click **Apply**, which saves the Intake without leaving the page, or
- Click **Basic** or **Participants** to move to one of those tabs, or
- Click **Save**, which saves the Intake and exits back to the Intake Workload screen.

**Important:** Once an Intake has been saved, you cannot delete it.

8. Click **Apply**.

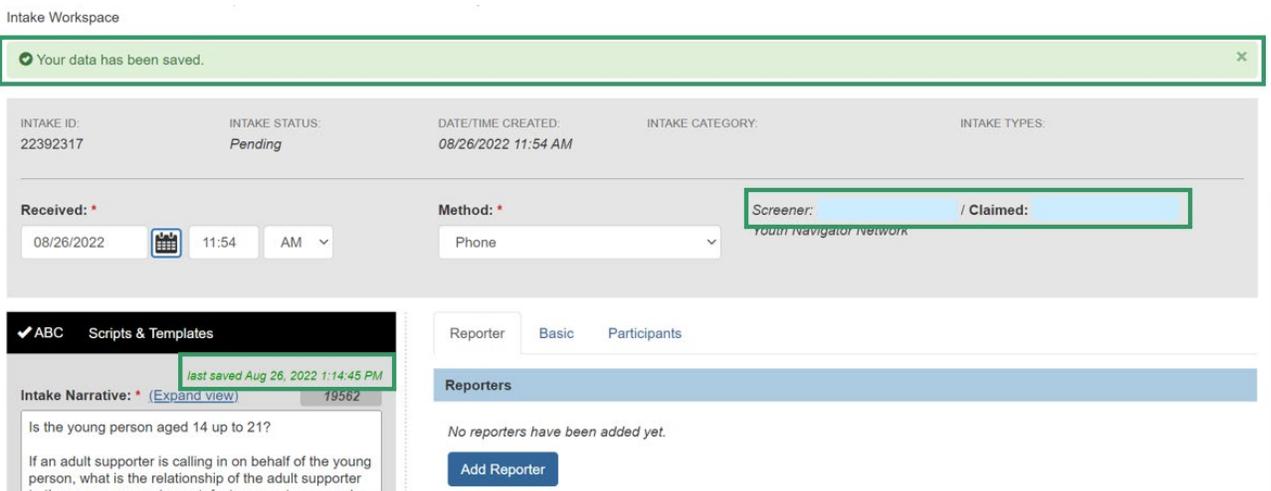


The screenshot shows the Intake form interface. At the top left, there is a header with 'ABC Scripts & Templates'. Below it, the 'Intake Narrative' section is visible, containing text about the young person's age and the relationship of the adult supporter. To the right, there are tabs for 'Reporter' (Basic and Participants) and a 'Reporters' section with an 'Add Reporter' button. At the bottom, the 'Intake Status' is set to 'Pending', and the 'Apply', 'Save', and 'Cancel' buttons are visible. The 'Apply' button is highlighted with a red box.

A confirmation message displays, “Your data has been saved.”

**Note:** Once the **Intake** has been saved, additional information displays:

- The **Intake Narrative** grid displays the date and time the Intake was **last saved**.
- In the grey header, the  **Screener** field displays the name of the user who created the Intake.
- The  **Claimed** field displays the name of the user who last accessed the Intake in edit mode, so others can see who is working on it.

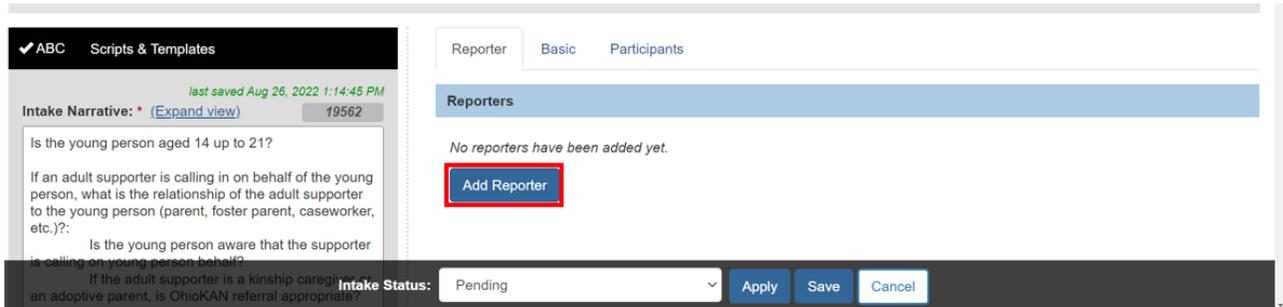


The screenshot shows the Intake form interface after saving. A green confirmation message at the top reads 'Your data has been saved.' Below it, the 'Intake Workspace' header is visible. The 'Intake ID' is 22392317, the 'Intake Status' is 'Pending', and the 'Date/Time Created' is '08/26/2022 11:54 AM'. The 'Intake Category' is 'Youth Navigator Network' and the 'Intake Types' are 'Screener' and 'Claimed'. The 'Received' section shows the date '08/26/2022', time '11:54 AM', and method 'Phone'. The 'Method' section shows 'Phone'. The 'Reporter' section shows 'Basic' and 'Participants' tabs. The 'Reporters' section has an 'Add Reporter' button. The 'Intake Narrative' section shows the text about the young person's age and the relationship of the adult supporter. The 'last saved Aug 26, 2022 1:14:45 PM' message is highlighted with a green box.

# Creating a Youth Navigator Intake

## Completing the Reporter Tab

### 1. Click Add Reporter.

The screenshot shows the 'Reporter' tab in the 'Basic' view. On the left, there is a 'Scripts & Templates' sidebar with an 'Intake Narrative' field containing a question: 'Is the young person aged 14 up to 21?'. Below this is another question: 'If an adult supporter is calling in on behalf of the young person, what is the relationship of the adult supporter to the young person (parent, foster parent, caseworker, etc.)?'. At the bottom of the sidebar, there is an 'Intake Status' dropdown menu set to 'Pending', with 'Apply', 'Save', and 'Cancel' buttons. On the right, the 'Reporters' section is empty, displaying the message 'No reporters have been added yet.' and a red-bordered 'Add Reporter' button.

The **Add Reporter** screen appears.

**Note:** Click the **Current Narrative** drawer at the top of the page to access the Intake Narrative without leaving this page, if needed. The **Current Narrative** is available throughout the Intake on screens where the Intake Workspace Narrative field is not shown.

**Note:** The **Reporter** is the person requesting services or information for themselves or someone else.

### 2. Select the **Type of Reporter**.

- The Reporter Information section automatically sets the Type to **Individual**.
- If the Reporter is contacting Youth Navigator Network in their capacity as a professional or representative of a community or government agency, select the **Agency/Professional** radio button.
- If the Reporter does not wish to identify themselves, select the **Anonymous** radio button.
  - The Gender, Contact, Address, and Relationship to Child(ren) fields are optional for an Anonymous Reporter.
  - Skip to the **Completing the Contact & Situation Knowledge** section below.

### 3. Click **Search Person**.

**Note:** You have the option to manually enter an Individual Reporter's Name, Gender, Contact, and Address, by typing into the fields. However, selecting a SACWIS Person by following these steps streamlines the process by pulling existing information forward.

# Creating a Youth Navigator Intake

Add Reporter

Current Narrative

Current Narrative (saved 08/26/2022 01:14 pm) v

Reporter Information

Select the type of Reporter:

- Individual
- Agency / Professional
- Anonymous

Reporter Details

Name: \*

Person ID:

Gender

Contact:  Ext:

Other Contact:

Address:

Reporter Type:

Relationship to Child(ren):

Apply Save Cancel

The **Search for Person** screen appears.

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

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

## Creating a Youth Navigator Intake

**Search For Person**

Person ID:  ~ OR ~ SSN:

*Note: If Person ID or SSN are entered, all other search criteria will be ignored.*

OR

Last Name:  First Name:  Middle Name:  Gender:

DOB:   ~ OR ~ Age Range:  -   
From Age To Age

[Reference, TCN, and Address Criteria](#) ▾

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

Sort by:

+ AKA/Nicknames

Fewer Results More Results

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

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

**Person Search Results**

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

Include only active case members

	Person Name / ID	Address	Gender	(Age) DOB	Active Case
<a href="#">select</a>	Sampleton, Sue / 28612867	321 Oak Tree Lane Sometown OH 54321	Female		
	<a href="#">Related Persons</a> ▾				
<a href="#">select</a>	Sample, Susie / 28612866	123 Anytown Road Anytown OH 12345	Female		
	<a href="#">Related Persons</a> ▾				

The **Add Reporter** screen appears, displaying the selected Person's information in the **Reporter Details** section.

8. Select the **Reporter Type** from the dropdown menu.
9. Enter the **Relationship to Child(ren)** in the text box.

**Note:** This refers to the relationship of the Reporter to the Young Person. If the Reporter is the Young Person, enter "self" in this field.

# Creating a Youth Navigator Intake

**Note:** If the **Type of Reporter** is **Individual**, skip to the **Completing the Contact & Situation Knowledge** section of this article.

Add Reporter

Current Narrative

Current Narrative (saved 09/28/2022 01:14 pm) ▾

Reporter Information

Select the type of Reporter:

- Individual
- Agency / Professional
- Anonymous

Reporter Details

Name: *	Sample, Susie	Search Person	Clear Person
Person ID:	28612866		
Gender	Female ▾		
Contact:	<input type="text"/>	Ext:	<input type="text"/>
Other Contact:	<input type="text"/>		
Address:	123 Anytown Road Anytown, OH 12345		
Reporter Type:	▾		
Relationship to Child(ren):	<input type="text"/>		

## Linking the Reporter Organization

If the **Type of Reporter** is **Agency/Professional**, additional fields display to capture information about their agency or organization.

1. Click the **Reporter is a solo practitioner** checkbox if the Reporter is a Professional who is not affiliated with any agency or organization.
  - Skip to the **Completing the Contact & Situation Knowledge** section below.
2. Click **Search Provider** if the Reporter is not a solo practitioner.

**Note:** In Ohio SACWIS, all service providers, agencies, and organizations are **Providers**.

# Creating a Youth Navigator Intake

**Reporter Information**

Select the type of Reporter:

Individual

Agency / Professional

Anonymous

**Reporter Details**

Reporter is a solo practitioner

Name: \* Sample, Susie

Person ID: 28612866

Gender: Female

Contact:

Address: 123 Anytown Road Anytown, OH 12345

Provider ID:

Organization Name:

Organization Address:

Organization Contact:

Reporter Type:

Relationship to Child(ren):

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

3. Enter **Provider Name** and/or other search criteria.
4. Select **Provider Category** (required).
  - **Agency Contract:** A Public Children Services Agency (PCSA), private child placing agency (PCPA), or private non-custodial agency (PNA) certified by ODJFS.
  - **Residential:** A licensed Children’s Residential Center.
  - **Non-ODJFS:** This category includes all other providers, such as schools, day care centers, physicians, mental health agencies, hospitals, health departments, volunteer organizations, other government agencies, etc.
5. Click **Search**.

# Creating a Youth Navigator Intake

Search For Provider Profile

Provider ID:

OR

Provider Name:

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

Provider Category:

Agency Type:

Agency:

Provider Type:   Include "Closed" Provider Type Status

Provider Status:

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

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

+ AKA/Nicknames

Fewer Results More Results

The **Search Results** appear.

6. Click the **select** link beside the agency/organization.

**Note:** If the Provider does not exist in SACWIS, click **Add Non-ODJFS Provider** and follow the steps in the article, [Creating a Non-ODJFS Provider](#).

# Creating a Youth Navigator Intake

**Search Results**

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

	Provider Name / ID	Provider Status	Provider Category	Address
<a href="#">select</a>	XYZ Service Agency / 28612808 <a href="#">View Provider Type Information</a> ▾	ACTIVE	NONODJFS	123 Anytown Road, Anytown, OH 12345

**Add Non-ODJFS Provider**

The Add Reporter screen appears, displaying the selected Provider information.

**Note:** The Provider ID is a hyperlink to the Provider record.

**Reporter Details**

Reporter is a solo practitioner

Name: \*

Person ID: [28612866](#)

Gender:

Contact:

Address:

Provider ID: [28612808](#)

Organization Name:

Organization Address:

Organization Contact:

## Completing the Contact & Situation Knowledge

**Note:** In the **Contact & Situation Knowledge** section, the **Contact Method** and **Date reporter contacted agency** will show the same information that was displayed in the Intake header on the tab view.

1. In the **Contact Method** field, select the appropriate value from the drop-down menu.
  - **Contact Method** is automatically set to **Phone** when the Intake is created.
2. In the **Date reporter contacted agency** field, enter the date and time.

## Creating a Youth Navigator Intake

- **Date reporter contacted agency** is automatically set to the date and time the Intake was created, but an earlier date and/or time may be entered if needed.
3. Select Yes or No response to **Is parent/guardian/custodian aware of referral?**
  4. Select Yes or No response to **Can parent/guardian/custodian be contacted by Youth Navigator?**

**Note:** If the Reporter Type is Resource Parent, Kinship Caregiver, or Parent, the fields in steps 3 and 4 will automatically be set to Yes, but they can be changed if needed.

5. In the **How did you hear about Youth Navigator?** grid, select all applicable values by clicking on each one.
  - This will activate the **Add** link.
6. Click **Add** to move the highlighted values to the **Selected options** grid.
7. Click **Save**.

The screenshot displays the 'Contact & Situation Knowledge' section of the intake form. It includes the following elements:

- Contact Method:** A dropdown menu set to 'Phone'.
- Date reporter contacted agency:** A date field set to '08/26/2022', a time field set to '11:54', and an AM/PM selector set to 'AM'.
- Is parent/guardian/custodian aware of referral?** Radio buttons for 'Not Answered' (selected), 'Yes', and 'No'.
- Can parent guardian/custodian be contacted by Youth Navigator?** Radio buttons for 'Not Answered' (selected), 'Yes', and 'No'.
- How did you hear about Youth Navigator?:** A list of options including 'Community event', 'County Job and Family Services', 'Court/Legal', 'Declined to answer', 'Friend/Family', 'Youth Navigator website' (highlighted in blue), and 'Other'. An 'Add' button is circled in orange.
- Selected options:** A grid containing 'Internet Search'.
- Buttons:** 'Apply', 'Save', and 'Cancel' buttons are located at the bottom.

The **Intake Workspace Reporter** tab appears, with the Reporter displayed.

**Note:** Additional Reporters may be added to the Intake as needed by repeating the above steps.

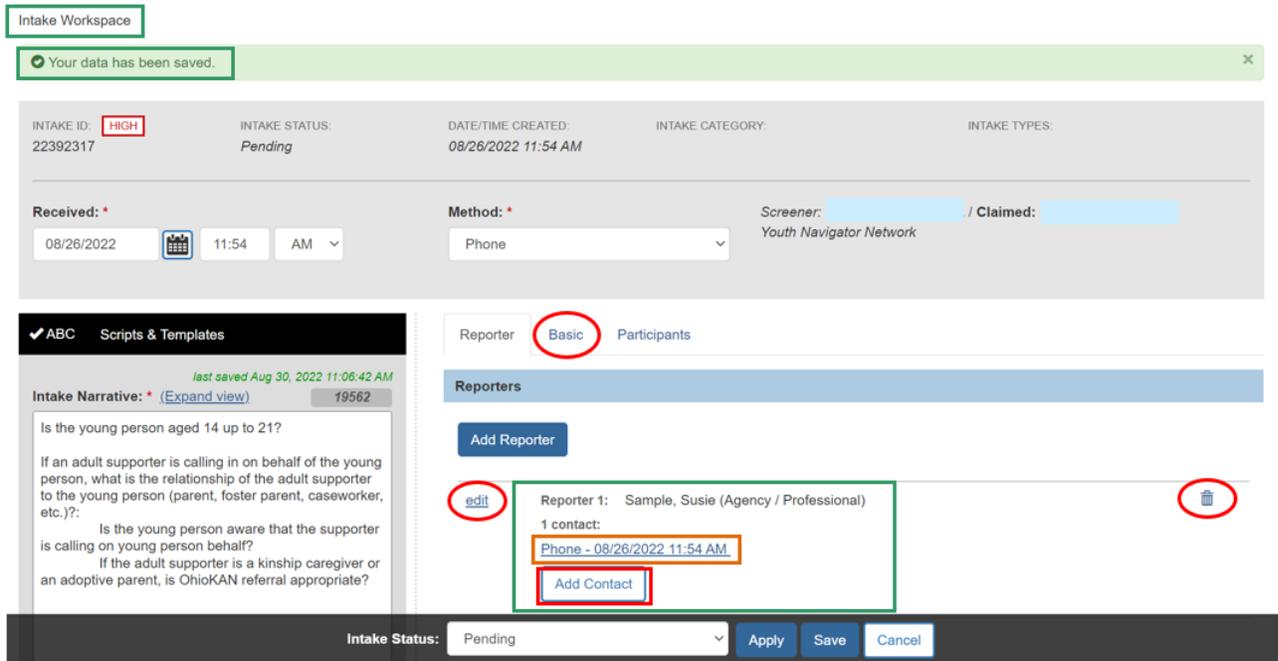
Additional Contacts from the same Reporter may be added by clicking **Add Contact** and following the steps in this sub-section.

# Creating a Youth Navigator Intake

## Editing Reporter and Contact Details

The Reporter and Contact details may be edited with the following steps.

8. Click **edit** to return to the Reporter Details screen.
9. Click the **delete** icon (  ) to delete the Reporter and their Contact information.
10. Click the **Contact link** to edit the Contact & Situation Knowledge details.
  - This link displays as the Method, followed by the Date and Time.
11. Click the **Basic** tab.



The screenshot shows the 'Intake Workspace' interface. At the top, a green notification bar states 'Your data has been saved.' Below this, the intake details are displayed: INTAKE ID: 22392317 (with 'HIGH' in a red box), INTAKE STATUS: Pending, DATE/TIME CREATED: 08/26/2022 11:54 AM, INTAKE CATEGORY: (empty), and INTAKE TYPES: (empty). The 'Received:' section shows a date of 08/26/2022, time of 11:54 AM, and a method of 'Phone'. The 'Method:' section shows 'Phone' and 'Youth Navigator Network'. The 'Reporter' section has tabs for 'Reporter', 'Basic' (circled in red), and 'Participants'. Below the tabs is an 'Add Reporter' button. The 'Reporters' section shows a list with one entry: 'Reporter 1: Sample, Susie (Agency / Professional)'. This entry has an 'edit' link (circled in red) and a 'delete' icon (circled in red). Below the reporter entry, there is a '1 contact:' section with a 'Phone - 08/26/2022 11:54 AM' entry (circled in orange) and an 'Add Contact' button (circled in red). At the bottom, the 'Intake Status:' is set to 'Pending' with 'Apply', 'Save', and 'Cancel' buttons.

The **Basic** screen appears.

## Completing the Basic Tab

1. In the **Intake Workload Name** text box, type the name you want to see on the Workload screen to help identify this Intake in the list (optional).
2. In the **Intake Category** field, select **Youth Navigator** from the drop-down menu.

**Note:** For steps to enter a **Post Emancipation category Young Adult Services** Intake, please refer to the article, [Creating and Linking a Young Adult Services Intake](#).

# Creating a Youth Navigator Intake

08/26/2022 11:54 AM Phone Youth Navigator Network

Reporter Basic Participants

Intake Type

Intake Workload Name:

Intake Category:

Intake Types:  Add All Add

Selected Types: Remove Remove All

Intake Status: Pending Apply Save Cancel

Intake Narrative: \* (Expand view) 19562

last saved Aug 31, 2022 9:12:08 AM

Is the young person aged 14 up to 21?

If an adult supporter is calling in on behalf of the young person, what is the relationship of the adult supporter to the young person (parent, foster parent, caseworker, etc.)?:

Is the young person aware that the supporter is calling on young person behalf?

If the adult supporter is a kinship caregiver or an adoptive parent, is OhioKAN referral appropriate?

A County field and Intake Type options appear on the screen.

3. In the **County** field, select the county where the Young Person lives or will receive services from the drop-down menu.
4. In the **Intake Type** grid, select the applicable option by clicking on it.
  - **Youth Navigator** should be selected when documenting a referral or request for services.
  - **Other/Information Only** may be used to document general inquiries about the program.
5. Click **Add** to move the value to the **Selected Types** grid.
  - For **Other/Information Only** type, skip to the **Completing the Participants Tab** section below.

# Creating a Youth Navigator Intake

The screenshot displays the 'Intake Type' section of a form. It includes fields for 'Intake Workload Name', 'County' (highlighted with a red box), and 'Intake Category' (set to 'Youth Navigator'). Below these is a section for selecting intake types, with 'Youth Navigator' and 'Other/Information Only' listed. An 'Add' button is circled in orange. At the bottom, the 'Intake Status' is set to 'Pending', with 'Apply', 'Save', and 'Cancel' buttons.

Additional fields appear on the screen for a Youth Navigator type intake.

**Note:** The **Additional Comments about intake (internal use only)** text box a place to enter any temporary, internal notes about the intake. Any text entered here displays on the Intake Workload until the Intake is screened. Once the Intake is linked to a case, the Additional Comments disappear. This field is not required.

6. In the **Reason(s) for Referral** grid, select all applicable values by clicking on each.
7. Click **Add** to move the values to the **Selected Reason(s) for Referral** grid.
8. Select Yes or No response to **Does this report allege human trafficking of a child or children?**

**Note:** Hover your cursor over the **information icon** (  ) for a definition of human trafficking. If trafficking of a child is indicated, a report should be made to the Public Children Services Agency in the county where the child lives.

9. In the **Living arrangement at time of intake** field, select the option from the drop-down menu that is most accurate for the Young Person(s).
10. In the **Children Services Involvement?** field, select the appropriate option from the drop-down menu.
11. Click the **Participants** tab.

# Creating a Youth Navigator Intake

The screenshot displays the 'Participants' tab of the Youth Navigator Intake form. The 'Intake Type' section shows 'Youth Navigator' selected in the 'Intake Category' dropdown. The 'Reason(s) for Referral' list includes 'Young Person stress' and 'Challenging family dynamics', both of which are highlighted in blue. The 'Selected Reason(s) for Referral' list is currently empty. The 'Does this report allege human trafficking of a child or children?' question has 'Not Answered' selected. The 'Living arrangement at time of intake' and 'Children Services Involvement?' dropdowns are also visible. The 'Intake Status' at the bottom is set to 'Pending'.

The **Participants** screen appears.

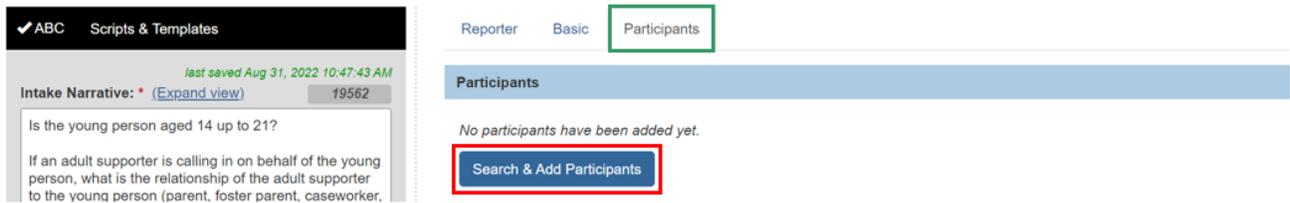
## Adding Participants

**Note:** Intake **Participants** include the **Young Person** and any involved family members, such as a parent, caregiver, or the Young Person's own child, as applicable.

- If a **Reporter** was entered with a Reporter Type of **Young Person**, they will automatically be added as an **Intake Participant** and display on the tab.
- If the Intake Type is **Other/Information Only**, **Participants** are not required when the report does not concern a specific Young Person, such as a general inquiry about the program.

# Creating a Youth Navigator Intake

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



The screenshot shows a software interface with a dark header bar containing 'ABC Scripts & Templates'. Below the header, there are tabs for 'Reporter', 'Basic', and 'Participants', with 'Participants' selected. The main content area is titled 'Participants' and contains the text 'No participants have been added yet.' A red box highlights a blue button labeled 'Search & Add Participants'. On the left side, there is a sidebar with an 'Intake Narrative' section, including a question: 'Is the young person aged 14 up to 21?' and a sub-question: 'If an adult supporter is calling in on behalf of the young person, what is the relationship of the adult supporter to the young person (parent, foster parent, caseworker, ...)'.

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

## 2. Complete the following fields, if available, to search for the person in SACWIS:

- **First Name**
- **Last Name**
- **Gender**
- **DOB (Date of Birth) or Age Range**
- **SSN (Social Security Number)**
- **Person ID**
- **Address**
- **County**

**Note:** If **SSN** or SACWIS **Person ID** is entered, all other search criteria will be ignored.

## 3. Click **Search**.

**Important:** To find an existing person that may be missing one or more of the above elements, it helps to start with a wide search using fewer criteria.

A Young Person who has had prior involvement with children services in Ohio will have a Person record in SACWIS.

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

# Creating a Youth Navigator Intake

Search & Add Participants

Current Narrative

Current Narrative (saved 08/31/2022 10:47 am) v

**Search & Add Participant**

First Name:  Middle Name:

Last Name:

Gender:

DOB:   -or- Age Range:  -   
From Age To Age

SSN:

Person ID:

*Note: If SSN or Person ID are entered, all other search criteria will be ignored*

Address:  County:

Enter at least 8 characters to get address suggestions

Search Using:

First Name  Last Name  Middle Name  Gender

DOB/Age Range  SSN  Address/County

Sort Order:

Relevance (Highest-Lowest) v

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

+ AKA/Nicknames

Fewer Results More Results

The **Search Results** appear in the grid at the bottom of the screen.

**Important:** If the person does not have an existing record in SACWIS, please skip to the **Creating a New Person** section below.

## Creating a Youth Navigator Intake

4. Click to select the **checkbox** next to the appropriate **Person ID - Name**.
5. Click **Add Selected to Intake**.

Search Clear Form

Search Results

Result(s) 1 to 15 of 29 / Page 1 of 2

Person ID - Name	Address	Gender	(Age) DOB	Active Case
<input checked="" type="checkbox"/> 28612905 - Crayon, Blue	123 Some Other Road Anytown OH 12345			
<a href="#">Related Persons</a> ▾				
<input type="checkbox"/> 28612904 - Crayon, Emerald G	321 Somewhere Lane Sometown OH 12345	Female	(20) 02/02/2002	
<a href="#">Related Persons</a> ▾				

Add Selected To Intake Clear Selected Cancel

The **Participants** screen appears, displaying the selected person in the grid.

**Note:** Repeat steps 1-5 to add additional **Participants**, as applicable.

To delete a Participant from the Intake, click the delete icon.

ABC Scripts & Templates

Reporter Basic **Participants**

last saved Sep 1, 2022 3:15:56 PM

Intake Narrative: \* (Expand view) 19562

Is the young person aged 14 up to 21?

If an adult supporter is calling in on behalf of the young person, what is the relationship of the adult supporter to the young person (parent, foster parent, caseworker, etc.):?

Is the young person aware that the supporter is calling on young person behalf?

If the adult supporter is a kinship caregiver or an adoptive parent, is OhioKAN referral appropriate?

Participants

Search & Add Participants Participant Roles

[edit](#) 28612905 - Crayon, Blue 123 Some Other Road , Anytown , OH - 12345 [Related Persons](#)

Intake Status: Pending Apply Save Cancel

## Creating a New Person

If your search does not return the appropriate results, follow the steps in this section to create a new record from the **Search Results** screen.

1. Click **Create New Person**.

Search Results

No Results Returned.

Can't find who you're looking for?  
Create a new SACWIS person profile: **Create New Person**

Add Participant Cancel

## Creating a Youth Navigator Intake

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

2. Enter the **First Name** (required).
3. Enter the **Last Name** (required).

**Note:** Fields required to save a record are marked with a red asterisk (\*).

4. Enter any other available information under each heading.
5. Click **Save**.

NAME / ID: Crayon , Magenta / 28612953

Basic	Demographics	Address	Additional	Characteristics	Safety Hazard
-------	--------------	---------	------------	-----------------	---------------

**Person Information**  
Prefix:   
**First Name: \***  Middle Name:   
**Last Name: \***  Suffix:    
Gender:  SSN:   Retain  Add/Edit  
 No SSN Exists  
DOB:    Age:   Estimated DOB  DOB Unknown  
Hair Color:  Eye Color:   
Sexual Orientation:   
 Deceased Deceased Date:   Age At Time Of Death:   Deceased Date Unknown  
Driver's License #:  Issue State:  Expiration:

**AKA Names**

	Prefix	First Name	Middle Name	Last Name	Suffix	AKA Type
<input type="button" value="Add AKA"/>						

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

6. Click **Close**.

# Creating a Youth Navigator Intake

< >

Person Overview

Profile  
Education  
Medical  
Employment  
Military  
Background  
Delinquency

Your data has been saved.

PERSON NAME / ID:  
Crayon, Magenta / 28612910  
Female Age 0, DOB 08/01/2022

RACE:  
HISPANIC / LATINO:  
HAIR COLOR:  
EYE COLOR:

ENVIRONMENTAL HAZARDS:

AKA Names

Prefix	First Name	Middle Name	Last Name	Suffix	AKA Type
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Safety Hazards

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

Other Addresses

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

Close

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

## Adding Participant Roles

1. Click **Participant Roles**.

ABC Scripts & Templates

last saved Sep 2, 2022 11:36:41 AM

Intake Narrative: \* (Expand view) 19562

Is the young person aged 14 up to 21?  
If an adult supporter is calling in on behalf of the young person, what is the relationship of the adult supporter to the young person (parent, foster parent, caseworker, etc.)?:  
Is the young person aware that the supporter is calling on young person behalf?  
If the adult supporter is a kinship caregiver or an adoptive parent, is OhioKAN referral appropriate?

Reporter Basic **Participants**

Participants

Search & Add Participants **Participant Roles** Copy...

edit [28612905 - Crayon, Blue](#)  
123 Some Other Road , Anytown , OH - 12345  
[Related Persons](#)

edit [28612910 - Crayon, Magenta](#)  
Female < 1, 08/01/2022 |  
[Related Persons](#)

Intake Status: Pending Apply Save Cancel

The **Modify Participant Roles** screen appears, listing the Intake Participants and available Roles. On this screen you can either:

- Select an individual **Participant** and assign one or more **Roles** to that person, OR
  - Select multiple **Participants** and assign one or more **Roles** to all selected Participants at once.
2. Click the **Current Narrative** link if you wish to display the **Intake Narrative** on this detail screen for reference or editing (optional).

## Creating a Youth Navigator Intake

3. In the **Choose Participants** grid, click to mark the checkbox beside each Participant to whom you wish to assign a particular role(s).
4. From the **Available Roles** list, click the **Available Roles** you wish to assign to the selected Participant(s). (This will enable the **Add** link.)
5. Click **Add** to move the Role(s) to the Selected Roles list.

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

**Note:** When there is at least one selected **Participant** and at least one **Selected Role**, the **Assign Roles** button will be enabled.

6. Click **Assign Roles** to assign the Selected Roles to the selected Participant(s).

### Modify Participant Roles

Current Narrative

[Current Narrative \(saved 09/02/2022 11:36 am\)](#) ▾

### Select Participants to Assign/Modify Roles

#### Choose Participants

- Crayon, Blue /28612905
- Crayon, Magenta /28612910  
Female, Age < 1 , DOB 08/01/2022

#### Add Participant Roles

Available Roles:

- Nonrelative kinship caregiver
- Relative kinship caregiver
- Parent
- Foster Parent
- Professional
- Other involved adult (OIA)
- Other involved child (OIC)

#### Selected Roles:

- Remove  Remove All
- Young Person

**Assign Roles**

**Save** **Cancel**

The **Choose Participants** grid displays the roles that have been assigned to each Participant.

**Note:** To delete a role assigned in error, click the **delete** icon.

### Important:

- Each Participant must have at least one **Role** to complete the Intake.
- On a Youth Navigator type intake, there must be one Participant with the role of **Young Person** to complete the Intake.

7. Click **Save**.

# Creating a Youth Navigator Intake

Modify Participant Roles

Current Narrative

Current Narrative (saved 09/02/2022 02:33 pm) ▾

Select Participants to Assign/Modify Roles

Choose Participants

- Crayon, Blue /28612905  
Young Person
- Crayon, Magenta /28612910  
Female, Age < 1 , DOB 08/01/2022  
Other involved child (OIC)

Add Participant Roles

Available Roles:

- Young Person
- Nonrelative kinship caregiver
- Relative kinship caregiver
- Parent
- Foster Parent
- Professional
- Other involved adult (OIA)

Selected Roles:

Remove Remove All

Assign Roles

Save Cancel

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

ABC Scripts & Templates

Intake Narrative: \* (Expand view) 19562 last saved Sep 2, 2022 2:41:29 PM

Is the young person aged 14 up to 21?

If an adult supporter is calling in on behalf of the young person, what is the relationship of the adult supporter to the young person (parent, foster parent, caseworker, etc.)?:

Is the young person aware that the supporter is calling on young person behalf?

If the adult supporter is a kinship caregiver or an adoptive parent, is OhioKAN referral appropriate?

Reporter Basic Participants

Participants

Search & Add Participants Participant Roles Copy...

edit 28612905 - Crayon, Blue Young Person  
123 Some Other Road , Anytown , OH - 12345  
Related Persons

edit 28612910 - Crayon, Magenta Other involved child (OIC)  
Female < 1, 08/01/2022 |  
Related Persons

Intake Status: Pending Apply Save Cancel

## Adding Participant Relationships

**Note: Relationships** between all intake participants must be specified to complete the intake. When participants are added, existing relationships are automatically pulled into the intake.

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

1. Click the **Relationships** link (under each person's name) to expand a drawer showing the relationship of that person to the others listed.

## Creating a Youth Navigator Intake

**Note:** If there are individuals in the list set who do not have relationships established with one another, SACWIS will display the link as **# unspecified relationships** instead of **Relationships** (the pound sign represents the number of unspecified relationships for the individual). Unspecified relationships are denoted with an orange dot and orange text.

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

The screenshot shows the SACWIS interface with the 'Participants' tab selected. The 'Participants Relationships' section is highlighted. The 'edit' button for the relationship between Crayon, Emerald Green and 28612904 is circled in red. The relationship is currently set to '1 unspecified relationship'. The 'Intake Status' is 'Pending'.

Participant ID	Participant Name	Participant Role	Participant Details
28612905	Crayon, Blue	Young Person	123 Some Other Road , Anytown , OH - 12345 <a href="#">Related Persons</a>
28612904	Crayon, Emerald Green	Other involved adult (OIA)	Female 20, 02/02/2002   321 Somewhere Lane , Sometown , OH - 12345 <a href="#">Related Persons</a>
28612910	Crayon, Magenta	Other involved child (OIC)	Female < 1, 08/01/2022   <a href="#">Related Persons</a>

Relationship ID	Relationship Name	Relationship Details
Crayon, Blue / 28612905	Relationships	
Crayon, Emerald Green / 28612904	Female Age 20, DOB 02/02/2002	<ul style="list-style-type: none"><li>1 unspecified relationship</li><li>Biological Sister to Crayon, Blue</li><li>Unspecified Relationship to Crayon, Magenta</li></ul>
Crayon, Magenta / 28612910	Female Age 0, DOB 08/01/2022	<ul style="list-style-type: none"><li>1 unspecified relationship</li></ul>

The Manage Participant Relationships – Editor screen appears.

3. Select the applicable **Relationship** value from the dropdown menu under the focus person's name.

**Note:** The horizontal menu of Participants on the screen will allow you to update the relationships between one of the other persons in the list set and all the other listed individuals.

## Creating a Youth Navigator Intake

The starting focus person will be the one you selected to edit in step 2. To change the focus person, click their name in the horizontal menu. Arrows on either side of the menu allow you to navigate through the list.

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

4. Click **Save** when all relationships are complete.

Manage Participant Relationships - Editor

Editor List

Relationship Editor

Crayon, Blue / 28612905

Crayon, Emerald Green / 28612904  
Female Age 20, DOB 02/02/2002  
1 unspecified relationship

Crayon, Magenta / 28612910  
Female Age 0, DOB 08/01/2022  
1 unspecified relationship

Crayon, Emerald Green is the... to Crayon, Blue / 28612905

1<sup>st</sup> Biological Sister

Reciprocal: Crayon, Blue is Crayon, Emerald Green's Biological Brother

Crayon, Emerald Green is the... to Crayon, Magenta / 28612910  
Female Age 0, DOB 08/01/2022

Apply Save Cancel

The **Participants** screen appears.

## Completing the Intake

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

# Creating a Youth Navigator Intake

The screenshot shows the 'Participants' tab of the intake form. On the left, the 'Intake Narrative' section contains several questions: 'Is the young person aged 14 up to 21?', 'If an adult supporter is calling in on behalf of the young person, what is the relationship of the adult supporter to the young person (parent, foster parent, caseworker, etc.)?', 'Is the young person aware that the supporter is calling on young person behalf?', and 'If the adult supporter is a kinship caregiver or an adoptive parent, is OhioKAN referral appropriate?'. The 'Participants' list on the right includes three entries: '28612905 - Crayon .Blue\_ Young Person', '28612904 - Crayon .Emerald.Green\_ Other involved adult (OIA)', and '28612910 - Crayon .Magenta\_ Other involved child (OIC)'. Each entry has an 'edit' link and a trash icon. Below the list is the 'Participants Relationships' section, which shows relationships for 'Crayon .Blue / 28612905', 'Crayon .Emerald.Green / 28612904', and 'Crayon .Magenta / 28612910'. At the bottom, the 'Intake Status' is set to 'Pending' in a dropdown menu, with 'Apply', 'Save', and 'Cancel' buttons.

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

The tab where the missing information is entered is listed in parentheses at the end of each validation message.

Intake Workspace

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

- County is required (Basic).
- How did you hear about Youth Navigator is required (Reporter).

2. Click the appropriate tab(s) and enter the missing information, if needed.
3. Repeat Step 1, as needed, until there are no further validation messages.

**Important:** If there is no missing information when you select **Complete**, the Intake Workspace displays an **Intake Status** of **Complete**.

In **Complete** status, none of the information entered in the intake to this point may be edited. If any corrections are needed, you may change the Intake Status back to **Pending**.

If you have **Screening Decision Maker** security, the **Decision** tab will display. If you wish to record the screening decision immediately, skip to the next section, **Recording a Screening Decision**. Otherwise, continue to the next step.

4. Click **Save**.

# Creating a Youth Navigator Intake

Intake Workspace

INTAKE ID: **HIGH** 22392317      INTAKE STATUS: **Complete**      DATE/TIME CREATED: 08/26/2022 11:54 AM      INTAKE CATEGORY: Youth Navigator      INTAKE TYPES: Youth Navigator

Received: \* 08/26/2022 11:54 AM      Method: \* Phone      Screener: Youth Navigator Network / Claimed:

ABC Scripts & Templates      Reporter Basic Participants **Decision**

Intake Narrative: \* (Expand view) *last saved Sep 7, 2022 1:52:00 PM*

Is the young person aged 14 up to 21?  
If an adult supporter is calling in on behalf of the young person, what is the relationship of the adult supporter to the young person (parent, foster parent, caseworker, etc.)?:  
Is the young person aware that the supporter is calling on young person behalf?  
If the adult supporter is a kinship caregiver or an adoptive parent, is OhioKAN referral appropriate?

Participants

- [view](#) 28612905 - Crayon\_Blue\_ Young Person  
123 Some Other Road , Anytown , OH - 12345
- [view](#) 28612904 - Crayon\_Emerald.Green\_ Other involved adult (OIA)  
Female 20, 02/02/2002 | 321 Somewhere Lane , Sometown , OH - 12345
- [view](#) 28612910 - Crayon\_Magenta\_ Other involved child (OIC)  
Female < 1, 08/01/2022 |

Intake Status: Complete      Apply Save Cancel

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

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

## Recording a Screening Decision

1. Click the **decision** link for the Intake.

Intake Workload

Add Intake      View by: Completed      Filter

Showing 3 Intakes (Completed view):

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screener Name SDM Name	Status	Status Date/Time	
<a href="#">view</a> <b>decision</b>		22392317 <b>HIGH</b> 00:00 remaining		Youth Navigator	08/26/2022 11:54 AM		Complete	09/07/2022 1:52 PM	

The **Decision** screen appears.

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

**Note:** Your selection to the above question will populate the **Follow up** field, indicating follow up within 24 hours for an emergency, and 72 hours for non-emergency referrals, as determined by Youth Navigator Network policies and procedures.

3. Select the **Screening decision** from the dropdown menu.

## Creating a Youth Navigator Intake

- If the decision is **Screen Out**, select the **Reason for screening out** from the dropdown menu.
- Enter the **Date & time of screening decision**, OR
- Click **Use Current Date/Time** to populate the fields.

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

- Click **Save**.

Scripts & Templates

Intake Narrative: \* (Expand view) last saved Sep 7, 2022 2:19:12 PM

Is the young person aged 14 up to 21?  
If an adult supporter is calling in on behalf of the young person, what is the relationship of the adult supporter to the young person (parent, foster parent, caseworker, etc.):?  
Is the young person aware that the supporter is calling on young person behalf?  
If the adult supporter is a kinship caregiver or an adoptive parent, is OhioKAN referral appropriate?

Reporter Basic Participants **Decision**

**Decision Details**

Is this an emergency?  Follow up:

Screening decision:

Reason for screening out:

Date & time of screening decision:  
 AM

The **Decision Review** screen appears.

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

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

**Decision Review**

**Intake Summary**

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

You are about to decision this intake as: Screened In

Received Date/Time:	08/26/2022 11:54 AM	Intake ID:	22392317
Decision Date/Time:	09/07/2022 02:38 PM	Human Trafficking Allegation:	No
Intake Category:	Youth Navigator		
Intake Types:	Youth Navigator		

The **Intake Workload** screen appears, displaying the intake screening decision as its status.

# Creating a Youth Navigator Intake

Home Intake Case Provider Financial Administration

Intake Workload

Add Intake View by: Screened In Filter

Showing 1 intakes (Screened In view):

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screener Name SDM Name	Status	Status Date/Time	
<a href="#">view</a>			xxxxxxx	Youth Navigator	09/07/2022 9:42 AM		Screened In	09/07/2022 9:52 AM	  

Add Intake

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