

# Using Search Functionality for OhioKAN



**Knowledge Base Article**

# Using Search Functionality

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# Using Search Functionality

## Overview

This article explains the process of using the Person Search functionalities as an OhioKAN worker, and the importance of performing a comprehensive search prior to creating a new person to avoid duplicate persons in Ohio SACWIS.

You should always select an existing Person ID if you find a match with the name, birthdate and/or address as detailed below. If a Reporter, Intake or Case Member is an Adoptive Parent or Kinship Caregiver, it is highly likely they already exist as a Person ID in Ohio SACWIS.

**Important:** If you determine a duplicate Person ID has been created, please report this to an individual with the Person Merge capabilities within your agency or have your agency's technical point of contact create a ticket request with the OFC Automated Systems Help Desk at [SACWIS\\_HELP\\_DESK@jfs.ohio.gov](mailto:SACWIS_HELP_DESK@jfs.ohio.gov), requesting a Person Merge.

## Using the Name Match Precision Bar

When you perform a search in Ohio SACWIS, you will see a **Name Match Precision** bar at the bottom of the screen. The bar allows some control regarding the volume of search results. The bar defaults to the **AKA/Nicknames** search.

**Note:** The settings apply only to name fields, not other search criteria. The results default to **Sort by Relevance** based on the system match score. Users can select a different sort order from the **Sort by** drop-down menu, then click search again.

The text-based searches score matches in the following way:

- 100% = First Name/Last Name exactly matches the search criteria
- 97.5% = AKA exact match
- 95% = Nickname match (equivalent nickname for search criteria matches)
- 90% = First/Last Name alternate spelling match (search criteria similarly spelled)
- 87.5% = AKA alternate spelling match (search criteria similarly spelled to AKA)
- 85% = First/Last Name phonetic match
- 82.5% = AKA phonetic match

The system averages these scores across all search fields to arrive at the "Relevancy" score for each potential match.

A search using the default setting will return results matching entered names, including AKA names/nicknames.

# Using Search Functionality

## Name Match Precision

Returns results matching entered names including AKA names/nicknames

Sort by:

Relevance (Highest-Lowest) ▾



The **Name Match Precision** bar can be set to return name variation results at 80% accuracy or 60% accuracy. If you wish to expand the volume of search results:

1. Click slightly to the right of the gray portion of the bar.

## Name Match Precision

Returns results matching entered names including AKA names/nicknames

Sort by:

Relevance (Highest-Lowest) ▾



The text in the gray box now reads: **Name Variations 80%**. This search will return results matching entered names, including AKA names/nicknames and name variations with 80% matching precision.

2. Click, **Search**.

## Name Match Precision

Returns results matching entered names including AKA names/nicknames and name variations with 80% matching precision

Sort by:

Relevance (Highest-Lowest) ▾



3. Click to the far right of the gray portion of the bar.

## Name Match Precision

Returns results matching entered names including AKA names/nicknames

Sort by:

Relevance (Highest-Lowest) ▾



## Using Search Functionality

The text in the gray box now reads: **Name Variations 60%**. This search will return results matching entered names, including AKA names/nicknames and name variations with 60% matching precision.

4. Click, **Search**.

The screenshot shows a search interface with a 'Name Match Precision' section. A gray box contains the text: 'Returns results matching entered names including AKA names/nicknames and name variations with 60% matching precision'. Below this is a horizontal bar with a green gradient. A gray button labeled '+ Name Variations 60%' is highlighted with a green circle. To the right of the bar are the labels 'Fewer Results' and 'More Results'. Below the bar are two buttons: 'Search' (circled in red) and 'Clear Form'. To the right of the search area is a 'Sort by:' dropdown menu set to 'Relevance (Highest-Lowest)'.

Another search option is, **Exact Match**.

5. Click on the far left end of the bar.

The screenshot shows the same search interface as above, but the 'Exact Match' option is selected. The gray box now contains the text: 'Returns results exactly matching entered terms'. The horizontal bar has a green gradient, and the 'Exact Match' button is highlighted with a red box. The 'Fewer Results' and 'More Results' labels are still present.

The text in the gray box now reads: **Exact Match**. This search will return results exactly matching entered terms.

6. Click, **Search**.

The screenshot shows the search interface with the 'Exact Match' option selected. The gray box contains the text: 'Returns results exactly matching entered terms'. The horizontal bar has a green gradient, and the 'Exact Match' button is highlighted with a green circle. The 'Fewer Results' and 'More Results' labels are still present. Below the bar are two buttons: 'Search' (circled in red) and 'Clear Form'. To the right of the search area is a 'Sort by:' dropdown menu set to 'Relevance (Highest-Lowest)'.

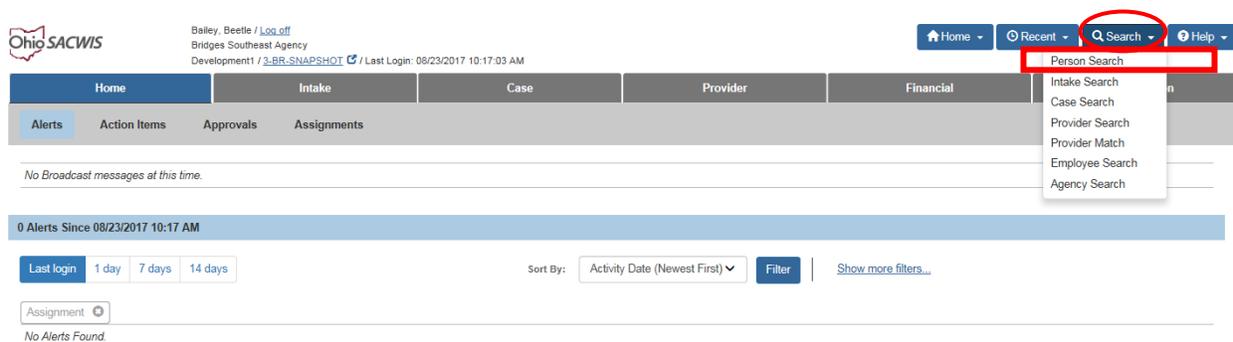
## Performing a Person Search

**Important:** Merged person ID is not a reference type field on the person search criteria page. Instead, if a search is conducted using a person ID that has been merged, the current person ID will automatically be returned in the search results with a merged badge. Merged person ID remains a reference type in the person record.

## Using Search Functionality

From the Ohio SACWIS Home Page, or any other location where a Person Search is completed, such as Reporter Details or Participants in an Intake record, complete the following steps:

1. Click **Search** (or proceed to the work item where the search functionality is located, such as an Intake or Case record).
2. Click **Person Search, Search Person, Search & Add Participants, Add Member** or any other button which will take you to a Person Search.



The **Search For Person** screen displays.

3. Enter search criteria.

**Note:** It is sometimes more advantageous to enter the entire name of a person, even if there is uncertainty about spelling; the system will recognize “sounds like” (phonetic) names. The system will also recognize common name variations, i.e., Bob, Bobby, Rob, Robert.

**Important:** A wildcard is automatically applied to the end of name fields. A wildcard means that the system will look for names that begin with the characters entered. For example, if you type “Johns” the system may also return “Johnson.” Do not enter a percent symbol (“%”) in any field, as the system does not recognize that as a wildcard.

# Using Search Functionality

## 4. Click, Reference, TCN, and Address Criteria

**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: Relevance (Highest-Lowest) ▾

+ AKA/Nicknames

*Fewer Results More Results*

Additional search options become available.

- 5. Add the search parameters, as applicable.
- 6. Click, **Search**.

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

Address Lookup:

Unit Name:  Unit Number:

County:  Authentication Number (TCN):

Reference Type:

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

Sort by: Relevance (Highest-Lowest) ▾

+ AKA/Nicknames

*Fewer Results More Results*

# Using Search Functionality

The **Person Search Results** grid appears.

**Note:** The system can return up to 120 results. If there are many results, it may be necessary to refine your search criteria.

Each search result has a **Related Persons** link which can assist you in determining if this is the correct person you are searching for.

7. Click, the **Related Persons** link below the appropriate name.



The screenshot shows a table titled "Person Search Results" with columns: Person Name / ID, Address, Gender, (Age) DOB, and Active Case. There are three rows of data. Each row has "view" and "edit" links on the left. A red box highlights the "Related Persons" dropdown menu in the first row.

	Person Name / ID	Address	Gender	(Age) DOB	Active Case
<a href="#">view</a> <a href="#">edit</a>					
<a href="#">view</a> <a href="#">edit</a>					
<a href="#">view</a> <a href="#">edit</a>					

A drop-down list of **Related Persons** appears.

8. Click the name of any individual to retrieve the **Person Overview** screen.



The screenshot shows a dropdown menu titled "Related Persons" with a red box around the title. The menu is open, showing a list of relationship types.

Relationship
Biological Mother
Biological Brother
Biological Father
Unknown

9. If you do not find the individual you are seeking, try altering the search criteria to be less specific (for instance, if you are searching by Social Security Number, try only searching by First Initial and Last Name to see if the Person ID exists in Ohio SACWIS, as that person's SSN may not have been entered in the system and can't be searched by that criteria.).
10. If you locate the correct person, add that individual to the record by clicking the select link or check box to Add Participant.
11. Only after completing a rigorous search of the system, should you consider clicking the Create New Person button.

Can't find who you're looking for?

Create a new SACWIS person profile:

Create New Person

# Using Search Functionality

**Important:** As stated earlier, most Adoptive or Kinship Caregivers will likely have a Person ID in Ohio SACWIS already, so there should only be few instances where a person record needs to be created.

## Performing an Intake Search

From the Ohio SACWIS Home Screen:

1. Click, **Search**.
2. Click **Intake Search** from the drop-down menu.



The **Search For Intake** screen appears.

3. Provide search criteria.
4. Click, **Case, Reporter, Participant and Address Criteria** for additional search options.
5. Enter additional search options, as applicable.
6. Click, **Search**.

A screenshot of the 'Search For Intake' screen. The title bar is 'Search For Intake'. Below it is an 'Intake ID:' input field. A large red box highlights the search criteria section, which includes: 'Received Date/Time Range' with 'From Date' and 'To Date' fields; 'Intake Category' and 'Intake Type' dropdown menus; 'Intake Status' dropdown menu; 'Agency' dropdown menu (set to 'Ohio Department of Job and Family Services'); 'Screener Last Name' and 'Screener First Name' input fields; and a link for 'Case, Reporter, Participant and Address Criteria' with an upward arrow.

# Using Search Functionality

The screenshot shows a search form with the following fields and options:

- Case ID:
- ~ OR ~
- Case Last Name:
- Case First Name:
- OR
- Decision Date/Time Range:
- From Date:
- To Date:
- Name Match Precision: Returns results matching entered names including AKA names/nicknames
- Sort By:
- + AKA/Nicknames
- Fewer Results  More Results
- Search**  Clear Form

## Performing a Case Search

**Important:** Merged Case ID is no longer found in the reference type drop-down. Instead, if search is conducted using a merged case ID, the current case ID will automatically be returned in the search results, identified by a merged badge. Duplicate cases will be returned with a duplicate badge and on click, will navigate to the primary case.

From the Ohio SACWIS Home Page:

1. Click, **Search**.
2. Select **Case Search** from the drop-down menu.



The Search For Case screen appears.

3. Complete the information.
4. Click, **Search**.

# Using Search Functionality

Search For Case

Case ID:  ~ OR ~ Case Last Name:

Case First Name:

OR

Case Reference Type:

Worker Last Name:

Worker First Name:

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

Sort by: Relevance (Highest-Lowest)

+ AKA/Nicknames

Fewer Results More Results

Search Clear Form

The **Search Results** grid appears.

5. Click, **View Case Members** to display the case members.

Search Results

Result(s) 1 to 9 of 9 / Page 1 of 1

Case Name / ID	Case Address	Current Case Status / Effective Date	Category	Agency Primary Worker	Agency Phone / Email
<a href="#">edit</a>					

[View Case Members ^](#)

## Performing a Provider Search

From the Ohio SACWIS Home Page:

1. Click, **Search**.
2. Click, **Provider Search**.



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

3. Enter search parameters.

# Using Search Functionality

Search For Provider Profile

Provider ID:

OR

Provider Name:

Member Last Name:

Member First Name:

Member Middle Name:

4. Click **Address, Contact and Provider Reference Criteria** for additional search options.
5. Enter additional information, as applicable.
6. Click, **Search**.

Address, Contact and Provider Reference Criteria ^

Address Lookup:

Unit Name:

Unit Number:

Name, Nick, & Display

Returns results matching entered names including AKA names/nicknames

+ AKA/Nicknames

Fewer Results More Results

Search Clear Form

The **Search Results** grid appears.

7. Click, **View Provider Type Information** to see what services are available from the listed Provider, as well as the Provider's status.

Search Results

Result(s) 1 to 15 of 139 / Page 1 of 10

Provider Name / ID	Provider Status	Provider Category	Address
<a href="#">view</a> <a href="#">edit</a>	ACTIVE	NONODJFS	

[View Provider Type Information ^](#)

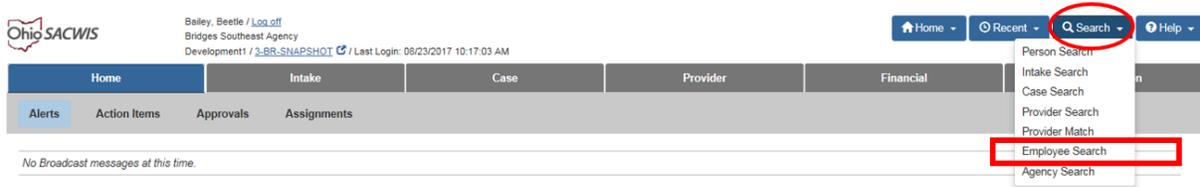
Other / Type Status: Active Effective Date: 12/08/2000 End Date:

## Performing an Employee Search

From the Ohio SACWIS Home Page:

1. Click, **Search**.
2. Click, **Employee Search**.

# Using Search Functionality



The **Search For Employee** screen appears.

3. Enter the search parameters.
4. Click, **Search**.

Search For Employee

Employee ID:  ~ OR ~ Last Name:  First Name:

Middle Name:

County:  Language Proficiency:

Education Level:

Include Inactive

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

Sort by: Relevance (Highest-Lowest)

+ AKA/Nicknames

Fewer Results More Results

Search Clear Form

The **Search Results** grid appears.

Search Results

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

Employee Name / ID	Email	Work Number	State / County	Supervisor	Unit
<a href="#">edit</a>					

Managed Units:

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