

Using Search Functionality



Knowledge Base Article

Using Search Functionality

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Using Search Functionality

Overview

This article explains the process of using the following Search functionalities in Ohio SACWIS

- Person Search
- Intake Search
- Case Search
- Provider Search
- Employee Search

Note: All search screens have been streamlined, placing the most commonly used search criteria first.

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.

Using Search Functionality

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

The screenshot shows a search interface. At the top left, the text "Name Match Precision" is followed by a green-bordered box containing the text "Returns results matching entered names including AKA names/nicknames". To the right, a "Sort by:" dropdown menu is set to "Relevance (Highest-Lowest)". Below this is a horizontal bar with a green segment on the left and a gray segment on the right. The gray segment contains the text "+ AKA/Nicknames". Below the bar, the text "Fewer Results" is on the left and "More Results" is on the right. At the bottom left, there are two buttons: "Search" (highlighted with a red box) and "Clear Form".

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.

This screenshot is similar to the previous one, but a red box highlights the right edge of the gray portion of the "Name Match Precision" bar. The text in the bar is still "+ AKA/Nicknames".

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**.

The screenshot shows the search interface after the search. The "Name Match Precision" bar now displays "+ Name Variations 80%". The text in the green-bordered box above it has updated to "Returns results matching entered names including AKA names/nicknames and name variations with 80% matching precision". The "Search" button is highlighted with a red box.

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

This screenshot is similar to the previous one, but a red box highlights the far right edge of the gray portion of the "Name Match Precision" bar. The text in the bar is still "+ AKA/Nicknames".

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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. At the top left, a dropdown menu labeled "Name Match Precision" is open, showing the selected option "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, labeled "Fewer Results" on the left and "More Results" on the right. A gray button labeled "+ Name Variations 60%" is positioned on the right side of the bar. Below the bar are two buttons: "Search" (highlighted with a red box) and "Clear Form". To the right of the search bar 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. The horizontal bar now has a gray button labeled "Exact Match" selected on the left side, highlighted with a red box. The rest of the bar remains green with the "Fewer Results" and "More Results" labels. The "+ Name Variations 60%" button is still present on the right. The "Search" and "Clear Form" buttons are at the bottom, and the "Sort by:" dropdown is on the right.

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 "Exact Match" selected on the search bar. The "Search" button is highlighted with a red box. The "Name Match Precision" dropdown is now closed and shows "Returns results exactly matching entered terms". The "Sort by:" dropdown remains set to "Relevance (Highest-Lowest)".

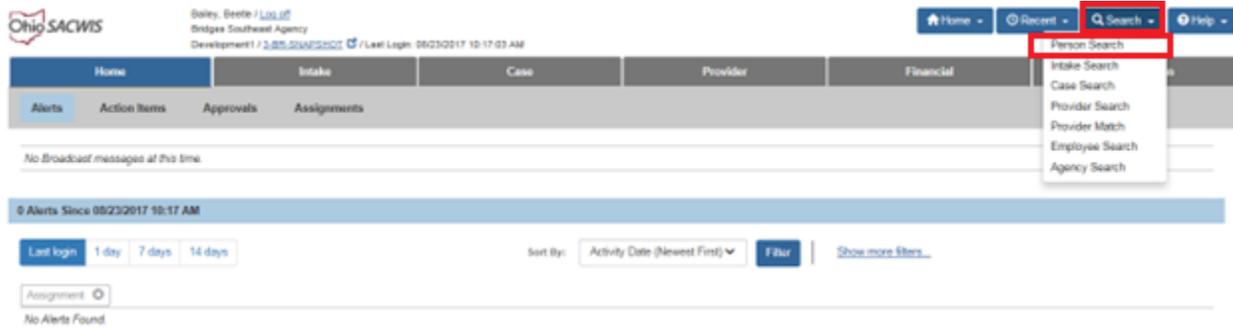
Performing a Person Search

Important: Merged person ID is no longer in the 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, it is just no longer needed as search criteria.

Using Search Functionality

From the Ohio SACWIS Home Page:

1. Click, **Search**.
2. Click, **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 no longer recognizes 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

Last Name: First Name: Middle Name: OR 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

More Results

Search Clear Form

Additional search options become available.

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

Reference, TCN, and Address Criteria

Address Lookup:
Enter at least 6 characters to get address suggestions

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

More Results

Search Clear Form

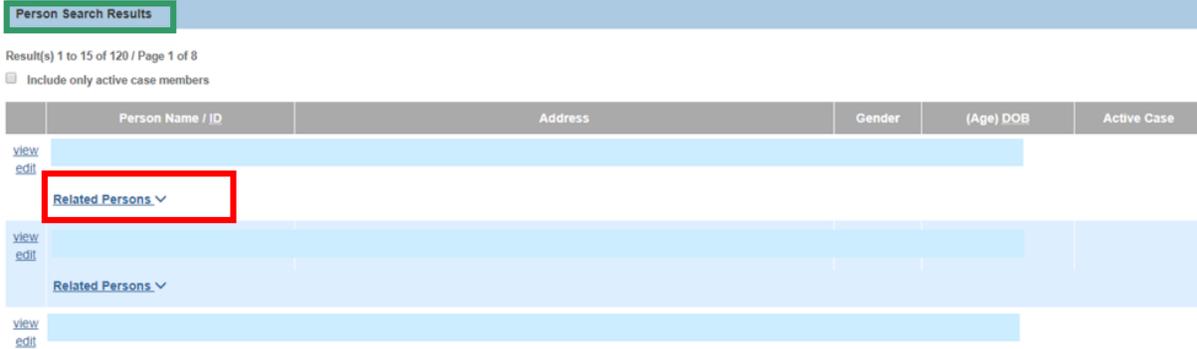
The **Person Search Results** grid appears.

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.

Using Search Functionality

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



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

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



Performing an Intake Search

From the Ohio SACWIS Home Screen:

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



Using Search Functionality

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**.

Search For Intake

Intake ID:

Received Date/Time Range:

From Date To Date

Intake Category: Intake Type:

Intake Status: Agency: Ohio Department of Job and Family Services

Screener Last Name:

Screener First Name:

Case, Reporter, Participant and Address Criteria

Case ID: - OR - Case Last Name:

Case First Name:

Decision Date/Time Range:

From Date To Date

Name Match Precision

Returns results matching entered names including AKA names/nicknames

+ AKA/Nicknames

More Results

Sort By:

Using Search Functionality

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.

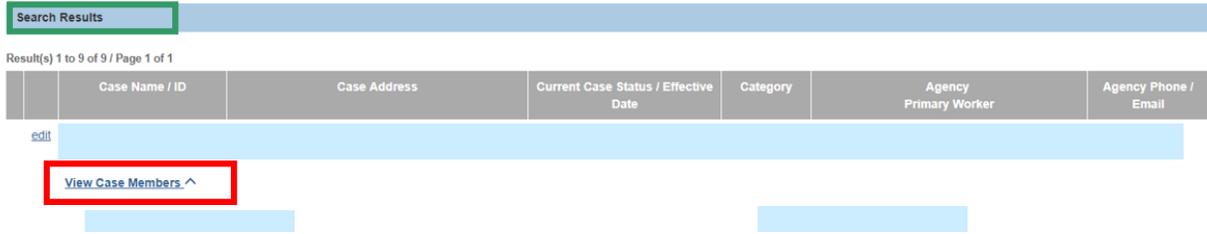
3. **Complete** the information.
4. Click, **Search**.

A screenshot of the 'Search For Case' screen. The screen has a title bar 'Search For Case'. Below the title bar, there are input fields for 'Case ID', 'Case Last Name', and 'Case First Name'. There are also radio buttons for '- OR -' and 'OR'. Below these fields, there is a 'Case Reference Type' dropdown menu. Further down, there are input fields for 'Worker Last Name' and 'Worker First Name'. At the bottom, there is a 'Name Match Precision' section with a note: 'Returns results matching entered names including AKA names/aliases'. There is also a 'Sort by' dropdown menu set to 'Relevance (Highest-Lowest)'. At the bottom left, there are two buttons: 'Search' and 'Clear Form'. The 'Search' button is highlighted with a red box.

Using Search Functionality

The **Search Results** grid appears.

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



Performing a Provider Search

From the Ohio SACWIS Home Page:

- Click, **Search**.
- Click, **Provider Search**.



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

- Enter search parameters.



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

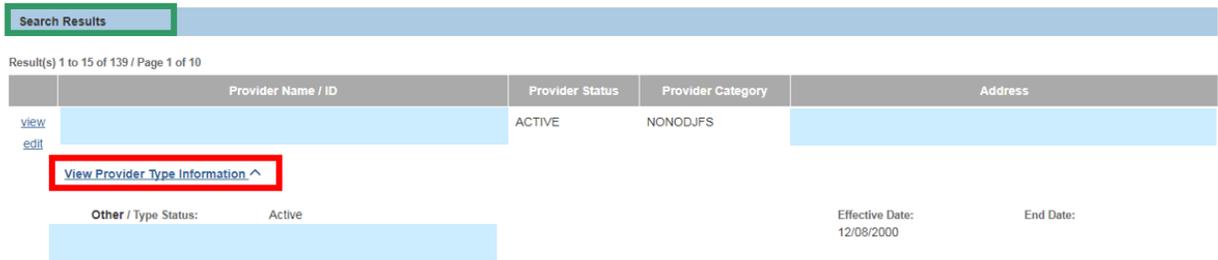


Using Search Functionality



The **Search Results** grid appears.

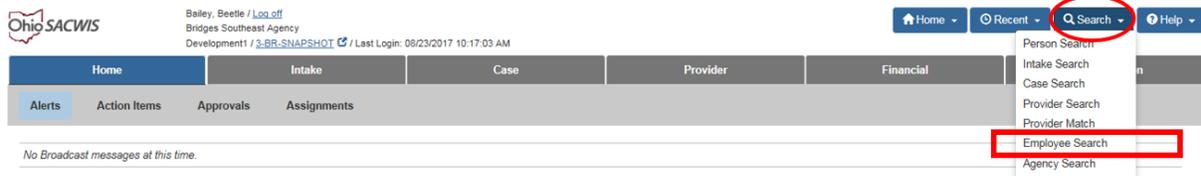
Click, **View Provider Type Information** to see what services are available from the listed Provider, as well as the Provider's status.



Performing an Employee Search

From the Ohio SACWIS Home Page:

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



The **Search for Employee** screen appears.

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

Using Search Functionality

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:

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
edit						
Managed Units:						

If you have additional questions pertaining to this Deployment Communication, please contact the [Customer Care Center](#).