

# **Ohio SACWIS Reference Guide – Ongoing Case Management**



## **Knowledge Base Article**

Ohio SACWIS Reference Guide – Ongoing Case Management

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# Ohio SACWIS Reference Guide – Ongoing Case Management

## Overview

This article provides a reference guide for navigating screens for Ongoing Case Management within the Ohio SACWIS system.

## View a Case Record

1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.

Home Intake **Case** Provider Financial Administration

Workload Court Calendar Placement Requests

Case Workload

Caseworker: [dropdown] Sort By: Case Name Ascending [Filter]

Test, Supervisor (25 cases)

**Sacwis, Susie** [ 123456 ] - Open 11/21/2022 - Adoption

4. Click the **View Case Information** link.

Case Overview

Activity Log

Attorney Communication

Intake List

Safety Assessment

Substance Abuse Screening

Forms/Notices

Category/Pathway Switch

Safety Plan

Actuarial Risk Assessment

Family Assessment

Ongoing Case A/I

Specialized A/I Tool

Law Enforcement

Justification/Waiver

Case Services

CASE NAME / ID: **Sacwis, Susie / 123456** Ongoing Open (06/17/2022) **HAZARD**

ADDRESS: 123 Test Rd, Test, Oh 12345

CONTACT:

AGENCY: Test County Children Services Board

PRIMARY WORKER: Test Worker

SUPERVISOR(S): Test Supervisor

[Assign Worker](#)

Case Actions

**View Case Information** | 2 Linked Cases | Program Categories | Case Status History

5. Click the tabs along the top to see different information (members, relationships, etc.)

Case Detail Members Relationships Associated Persons

Case Address: 123 Test Rd, Test, Oh 12345

Agency: Test County Children Services Board

Geo Code:

Assignment Information

## Ohio SACWIS Reference Guide – Ongoing Case Management

### Record a Case Profile

1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.
4. Click the **View Case Information** link.
5. On the **Case Detail** tab, select a choice from the **Primary Caretaker** field drop-down list.
6. If needed, select a name in the **Secondary Caretaker** field drop-down list.
7. Click the **Add Case Reference** button to record a case reference number.
8. Click the **Save** button.
9. **Repeat the previous two steps** for each **Case Reference ID** number that you want to add.
10. Click the **Apply** button.
11. On the **Members** tab, add members, edit members view member history, and copy an address, as needed.
12. On the **Relationship** tab, add and edit member relationships as need.
13. On the **Associated Persons** tab, add or edit associated persons as needed.

Case Detail

Members

Relationships

Associated Persons

Case Address: 123 Test Rd  
Test, Oh 12345

Agency: Test County Children Services Board

Geo Code:

Assignment Information

[View Case Status History](#) | [View Assignment History](#)

Worker Name	Role	Agency of Worker
Test Worker	Screening Decision Maker	Test County Children Services Board
Test Worker	Worker	Test County Children Services Board

Primary Caretaker:

Secondary Caretaker:

Reference List

	Reference Type	Reference Number	Description	
<a href="#">edit</a>	FACSIS Family ID	00		<a href="#">delete</a>
<a href="#">edit</a>	Legacy Case ID	02		<a href="#">delete</a>

Add Case Reference

Apply

Save

Cancel

## Ohio SACWIS Reference Guide – Ongoing Case Management

### View a Case Activity Log

1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.
4. Click the **Activity Log** link in the **Navigation** menu on the left.

Home Intake **Case** Provider Financial Administration

**Workload** Court Calendar Placement Requests

< >

Case Overview  
**Activity Log**  
Attorney Communication  
Intake List  
Safety Assessment  
Substance Abuse Screening  
Forms/Notices  
Category/Pathway Switch  
Safety Plan  
Actuarial Risk Assessment  
Family Assessment  
Ongoing Case All

CASE NAME / ID: **Sacwis, Susie / 123456** **Ongoing** **Open (04/09/2021)** **HAZARD**

ADDRESS: 123 Test Rd  
Test, Oh 12345

CONTACT:

AGENCY: **Test County Children Services Board**

PRIMARY WORKER: **Test Worker** SUPERVISOR(S): **Test Worker**

[Assign Worker](#)

5. Select the filter criteria.
6. Click the **Filter** button.
7. Click the **Edit, Copy or Report** link on the activity you want.

Activity Log Filter Criteria

Activity From Date:  Activity To Date:

Case Category:

Contact Type:

Category:

Sub Category:

Activity State:

Agency:

Advanced Search Criteria

Sort Results By:  ☐ Traverse Records Only

☒ Current Episode ☐ View Historical

**Filter** Clear Form

Activity Log

Result(s) 1 to 15 of 510 / Page 1 of 34

Add Activity

	Activity Date	Contact Type	Category	Sub Category	Created By	Activity State	Narrative
<b>edit</b> <b>copy</b> <b>report</b>	10/12/2023	General	General	Other		Completed	<a href="#">amend</a>

Associated Participants:

8. Click the **Close** button to return to the previous screen.

## Ohio SACWIS Reference Guide – Ongoing Case Management

### Record Case Activities

1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.
4. Click the **Activity Log** link in the **Navigation** menu on the left. Click the **Add Activity** button.

**Activity Log**

Result(s) 1 to 15 of 510 / Page 1 of 34

**Add Activity**

	Activity Date	Contact Type	Category	Sub Category	Created By	Activity State	Narrative
<a href="#">edit</a>	10/12/2023	General	General	Other		Completed	<a href="#">N</a>
<a href="#">copy</a>							<a href="#">amend</a>
<a href="#">report</a>							

Associated Participants:

5. Complete all fields, as needed.
6. Click the **Associate Participants** button.
7. Click the **Contact Status** for each next to participant you want.
8. Click the **Save** button.

**Case Associated Persons**

	Contact Status
Test, Person - 07/21/1999	<input checked="" type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed

Activity State: \*

**Apply** **Save** **Cancel** **Delete**

### Amend Case Activities


1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.
4. Click the **Activity Log** link in the **Navigation** menu on the left. Click the **Amend** link next to the Activity Log that you are amending.

## Ohio SACWIS Reference Guide – Ongoing Case Management

**Activity Log**

Result(s) 1 to 15 of 510 / Page 1 of 34

**Add Activity**

	Activity Date	Contact Type	Category	Sub Category	Created By	Activity State	Narrative
<a href="#">edit</a> <a href="#">copy</a> <a href="#">report</a>	10/12/2023	General	General	Other		Completed	 <a href="#">amend</a>

Associated Participants:

- Click the **Insert Correction** link.
- Enter the **New Correction** information.

**Narrative History**

Type	Date/Time Created	Created By	Agency
Original	10/12/2023 12:20 PM		Test County Children Services Board

[Insert Correction](#)
[View Narrative](#)

Activity State: \* Completed

[Close](#)

- Click the **Save** button.

**Correction Details**

New Correction: \*

(expand full screen)

[Spell Check](#)
[Clear](#)
10000

Existing Narrative:

(expand full screen)

The Life Skills CW closed

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

- Click the **Close** button.

## Ohio SACWIS Reference Guide – Ongoing Case Management

### View Case Conference Notes

1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.
4. Click **Case Conference Notes** link in the **Navigation** menu on the left.
5. Click the **View Narrative** link.
6. Click the **Close** button.

HomeIntake**Case**ProviderFinancialAdministration

WorkloadCourt CalendarPlacement Requests

<>

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[Case Services](#)  
[Legal Actions](#)  
[Legal Custody/Status](#)  
[Living Arrangement/  
Guardianship](#)  
[Initial Removal](#)  
[Placement Request](#)  
[Placement/CCA](#)  
[Residential Treatment  
Information](#)  
[Independent Living](#)  
[Case Plan Tools](#)  
[Visitation Plans](#)  
[Review Tools](#)  
[Family Team Meeting](#)  
[Safety Reassessment](#)  
[Reunification Assessment](#)  
[Case Conference Note](#)

CASE NAME / ID:  
Sacwis, Susie / 123456

Ongoing  
Open (04/09/2021)

HAZARD

Case Conference Note Filter Criteria

From Date:To Date:

Created By:Category:

Sort Results By:

Filter

Case Conference Note

Result(s) 1 to 6 of 6 / Page 1 of 1

	Category	Created By	Conference Date	Worker	Status
<a href="#">view</a>	Staffing	Test Worker	05/03/2021	Test Worker	Completed

Add NoteGenerate Report

## Ohio SACWIS Reference Guide – Ongoing Case Management

### Record a Case Plan

1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.
4. Click **Case Plan** link in the **Navigation** menu on the left.

The screenshot displays the Ohio SACWIS Case Management interface. At the top, there is a navigation bar with tabs: Home, Intake, Case (highlighted), Provider, Financial, and Administration. Below this, a sub-navigation bar includes Workload (highlighted), Court Calendar, and Placement Requests. On the left, a vertical navigation menu lists various case management functions, with 'Case Plan Tools' highlighted at the bottom. The main content area shows the 'Case Conference Note Filter Criteria' section, which includes fields for 'From Date', 'To Date', 'Created By', 'Category', and 'Sort Results By'. Below these filters is a 'Filter' button. The 'Case Conference Note' section is currently empty. The 'Case Plan Tools' section is visible at the bottom of the main content area, containing an 'Add Family Case Plan' button.

5. Click the **Edit** link to update a plan in progress.
6. Click the **Add Family Case Plan** button to create a new plan.


The screenshot displays the Ohio SACWIS Case Management interface, focusing on the 'Plan Filter Criteria' and 'Plans' sections. The 'Plan Filter Criteria' section includes a dropdown menu for 'Agency' and a 'Filter' button. Below this, the 'Plans' section is visible, containing an 'Add Family Case Plan' button. At the bottom, a table header is shown with columns: Plan Name, Plan Number, Plan Type, Effective Date, and Agency. The table body is currently empty.

## Ohio SACWIS Reference Guide – Ongoing Case Management

7. Select the type in **Case Plan Type** field.
8. Click **Add Child** or **Add Adult** button, as needed.

**Child(ren) Participating in the Family Case Plan**

Male Age 14, DOB 12/30/2008 

**Protected under ICWA:**    
No

**Child Location:**  
Children's Residential Facility

**Agency Legal Status:**  
Temporary Court Order

**Court Case Number:**

**Court ID Number:** 

**Child's Permanency Goal:** 

**Add Child to Family Case Plan**

**Relationships**

9. Click the **Save** button. The **Case Plan Topics** screen appears.

Previous Topic


Next Topic



Apply



**Save**



Cancel



10. Click each link in the **Topics** column and complete the fields.



**Family Case Plan Topics** 



**Parties to the Plan**   
 Not Completed



**Strengths And Needs**   
 Not Completed



**Concerns**   
 Not Completed



**Placement Information**   
 Completed



**QRTP**   
 Compliant

**Visitation**   
 Not Completed


**Foster Youth Rights Handbook**   
 Completed



**Independent Living Information**   
 Completed

**Court and Signatures**   
 Completed

**Approval**   
 Completed

**Child(ren) Participating in the Family Case Plan**


Male Age 14, DOB 12/30/2008 


**Protected under ICWA:**    
No

**Child Location:**  
Children's Residential Facility

**Agency Legal Status:**  
Temporary Court Order

**Court Case Number:**


**Court ID Number:** 

**Child's Permanency Goal:** 

**Add Child to Family Case Plan**

**Relationships**

**Adult(s) Participating in the Family Case Plan**

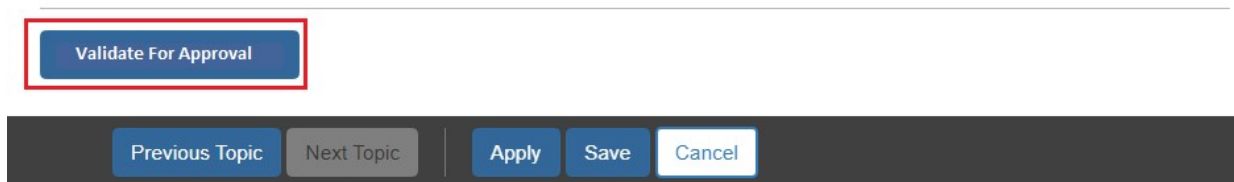
Female Age 38, DOB 07/23/1985 

**Contact Information:**

**Add Adult to Family Case Plan**

## Ohio SACWIS Reference Guide – Ongoing Case Management

11. When complete, click the **Validate for Approval** button.



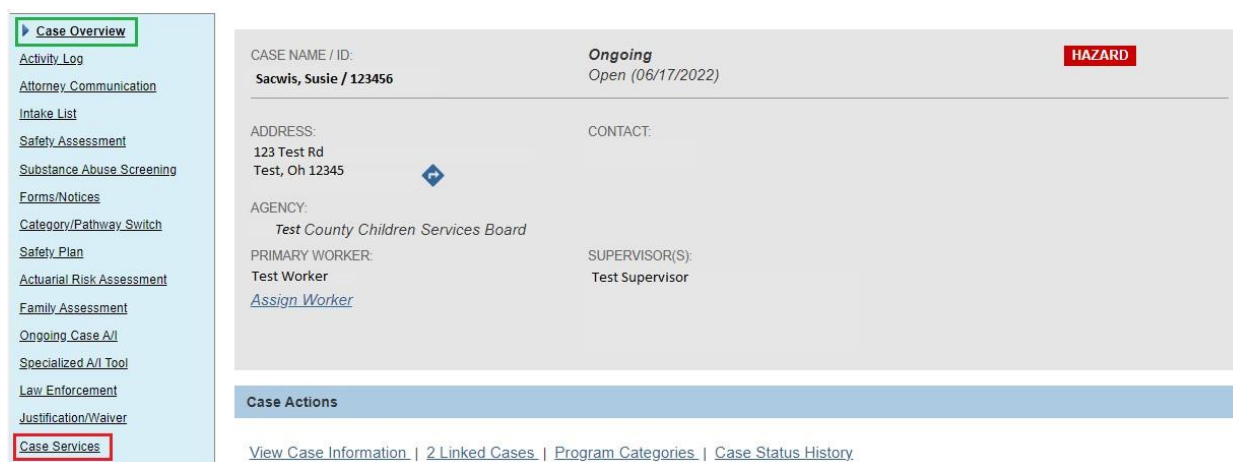
Validate For Approval

Previous Topic Next Topic Apply Save Cancel

12. Click the **Process for Approval** button.

### View Service Information

1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.
4. Click **Case Services** link in the **Navigation** menu on the left.



Case Overview

Activity Log

Attorney Communication

Intake List

Safety Assessment

Substance Abuse Screening

Forms/Notices

Category/Pathway Switch

Safety Plan

Actuarial Risk Assessment

Family Assessment

Ongoing Case A/I

Specialized A/I Tool

Law Enforcement

Justification/Waiver

Case Services

CASE NAME / ID: **Ongoing** **HAZARD**  
Sacwis, Susie / 123456 Open (06/17/2022)

ADDRESS: 123 Test Rd  
Test, Oh 12345

CONTACT:

AGENCY: Test County Children Services Board

PRIMARY WORKER: Test Worker  
Assign Worker

SUPERVISOR(S): Test Supervisor

Case Actions

[View Case Information](#) | [2 Linked Cases](#) | [Program Categories](#) | [Case Status History](#)

5. Click the **View** link.



Case Services

Service:  Add Case Services

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

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
<a href="#">view</a>	Sacwis, Susie	Case Management/Case Management Services	Case Member	06/14/2023 -	<a href="#">delete</a> <a href="#">service end</a>  <a href="#">Linked</a>

[Case Member / Caregiver / Caretaker History](#)

## Ohio SACWIS Reference Guide – Ongoing Case Management

6. Click the **Service Review** tab.

Service Information

Service Review

Service Activity

CASE NAME / ID: Sacwis, Susie / 123456

Ongoing / Open (04/09/2021)

Service Information

Agency: Test County Children Services Board

Risk Contributors: Emotional Functioning,Physical/Cognitive/Social Development,Self Protection

Effective Date: \* 06/14/2023

Estimated Service End Date:

Service Category: \* Case Management

Service Type: \* Case Management Services

Member Service Status History

☒ Current Status ☐ All Statuses

Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
-------------	--------	----------	---------------------	------------------	----------------------------	------------------

7. Click the **View** link next to the Service Review.

Service Information

Service Review

Service Activity

CASE NAME / ID: Sacwis, Susie / 123456

Ongoing / Open (04/09/2021)

Service Category: Case Management

Service Type: Case Management Services

Service Review

Expand All

	Case Member(s) / DOB	Review Date	
<a href="#">edit</a>	Sacwis, Susie - 12/30/2008	11/27/2023	<a href="#">delete</a>
<a href="#">view</a>			

Service Review Details

Add Service Review

Apply

Save

Cancel

8. Click the **Close** button.

## Ohio SACWIS Reference Guide – Ongoing Case Management

### Record a Removal

1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.
4. Click the **Initial Removal** link in the **Navigation** menu on the left.

5. Click **Edit** link if record is already in **Draft** status.
6. In the **Child's Name** field, select the child's name.
7. Click **Add Removal Record** to create new record.

	Child Name	Removal Date	Discharge Date	Status	
<a href="#">edit</a>	<a href="#">Sacwis, Susie / 123456</a>	06/23/2022		Draft	
<a href="#">view</a>	<a href="#">Sacwis, Susie / 123456</a>	11/02/2020	12/15/2020	Completed	

Child Name:

Add Removal Record

8. Complete **all fields** on the screen (except discharge date and discharge reason).
9. Click the **Apply** button.

## Ohio SACWIS Reference Guide – Ongoing Case Management

Removal Information

Removal Circumstances

Removal Information Details

Initial Removal Legal Status:  
Telephonic Order of Custody

ICWA Information:  
No information recorded

Removal Date: <sup>(a)</sup>  

07/01/2023

Custody Start Date: <sup>(a)</sup>  
07/01/2023  
☐ AWOL at Agency Custody <sup>(a)</sup>

☐ Removed prior to Agency Custody  
Selecting the checkbox applies to those youth removed via a pickup order, warrant, or arrest and placed in a detention facility.

Address at Removal: 

Select Address

  
An Address has not been selected

Circumstances:

Status: <sup>\*</sup> Draft 

Apply

Save

Cancel

10. Click **Removal Circumstance** tab.
11. Complete each **narrative** field.
12. Click the **Save** button.

## Record Placement Request

1. From the **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case Name / Case ID** link.
4. Click the **Placement Request** link in the **Navigation** menu on the left.

Home

Intake

Case

Provider

Financial

Administration

Workload

Court Calendar

Placement Requests

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Law Enforcement

Justification/Waiver

Case Services

Legal Actions

Legal Custody/Status

Living Arrangement / Guardianship

Initial Removal

Placement Request

CASE NAME / ID:

Sacwis, Susie / 123456

Ongoing

Open (04/09/2021)

HAZARD

ADDRESS:

123 Test Rd

Test, Oh 12345

CONTACT:

AGENCY:

Test County Children Services Board

PRIMARY WORKER:

Test Worker

SUPERVISOR(S):

Test Supervisor

Assign Worker

Case Actions

View Case Information

0 Linked Cases

Program Categories

Case Status History

One or more active case member(s) is missing demographic information: race, ethnicity, gender, DOB

Case members have unspecified relationships.

## Ohio SACWIS Reference Guide – Ongoing Case Management

5. In the **Child Name** field, select the name of child who you are adding the placement request for.
6. Click the **Add Placement Request** button.

**Placement Requests Filter Criteria**

Child Name:

Status:

From Request Date:

To Request Date:

Sort Results By:

Child Name (Ascending)

Filter

Clear Form

**Placement Requests**

Result(s) 0 / Page 0 of 0

Child Name:

Add Placement Request

7. Complete the **required** fields.
8. Click the **Link Provider** button.
9. Click the **Search** button.
10. Select all providers that match.
11. Enter additional comments in the narrative field, if needed.
12. Click the **Save** button.

**Placement Request Details**

Agency:
Test County Children Services Board

Request Date:
11/27/2023

Child Name:

DOB:
12/30/2008

Responsible Caseworker:\*

Responsible Placement Worker:
Employee Search

Placement With Siblings Preferred:\*

Placement Needed Date:

Estimated End Date:

Service Type:

Status: \*

Pending

**Potential Matches**

Additional Comments:

Spell Check
Clear
2000

**Placement Details**

Note: To complete placement of the child with the Accepted Provider, click Record Placement. If you have completed Placement Request Work and you do not wish to record a placement from the request record please select the appropriate status for the record. Caseworkers can also choose to record a placement record for the child by accessing the Placement List page for the Child's case record.

Record Placement

Save Cancel

## Ohio SACWIS Reference Guide – Ongoing Case Management

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