Ohio SACWIS Reference Guide – Ongoing Case Management

Knowledge Base Article

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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: [⌄]   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: *Ongoing*   [HAZARD]
Sacwis, Susie / 123456   *Open (06/17/2022)*

ADDRESS: CONTACT:
123 Test Rd
Test, Oh 12345   ◆

AGENCY:
    Test County Children Services Board
PRIMARY WORKER: SUPERVISOR(S):
Test Worker   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   Agency: Test County Children Services Board
               Test, Oh 12345

                                      Geo Code:

Assignment Information

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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	
edit	FACSIS Family ID	00		delete
edit	Legacy Case ID	02		delete

Add Case Reference

Apply   Save   Cancel

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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.

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

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

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 Date	Contact Type	Category	Sub Category	Created By	Activity State	Narrative
edit copy report	10/12/2023	General	General	Other		Completed	Ⓝ amend
	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	◉None ○Attempted ○Completed

Activity State: * Draft

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 Long that you are amending.

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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
edit copy report	10/12/2023	General	General	Other		Completed	Ⓝ amend
	Associated Participants:						

5. Click the **Insert Correction** link.
6. 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

7. 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

8. Click the **Close** button.

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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.

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.

Home	Intake	Case	Provider	Financial	Administration

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Justification/Waiver
Case Services
Legal Actions
Legal Custody/Status
Living Arrangement / Guardianship
Initial Removal
Placement Request
Placement/ICCA
Residential Treatment Information
Independent Living
Case Plan Tools

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: Conference Date (Descending)

Filter

Case Conference Note

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

Plan Filter Criteria

Agency:

Filter

Plans

Add Family Case Plan

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

Plan Name	Plan Number	Plan Type	Effective Date	Agency	

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

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

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

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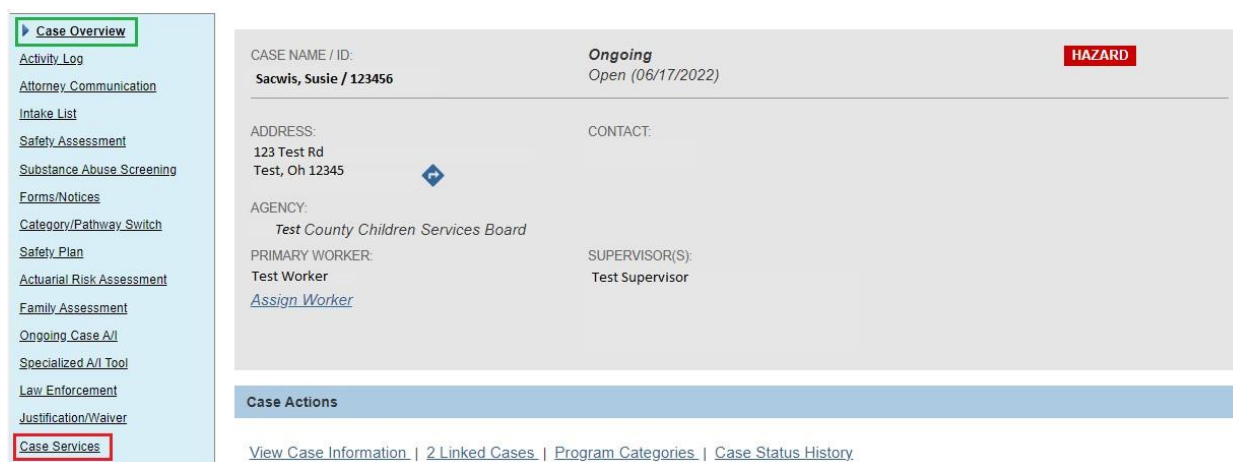
12. Click the **Process for Approval** button.

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.

5. Click the **View** link.

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	
edit	Sacwis, Susie - 12/30/2008	11/27/2023	delete
view			
	⊞ Service Review Details		

Add Service Review

Apply **Save** **Cancel**

8. Click the **Close** button.

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.

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

Removal Information   Removal Circumstances

Removal Information Details

Initial Removal Legal Status:
Telephonic Order of Custody

ICWA Information:
No information recorded

Removal Date: ⓐ
07/01/2023

Custody Start Date: ⓐ
07/01/2023

☐ AWOL at Agency Custody ⓐ

☐ 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:* [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.

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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
Assign Worker

SUPERVISOR(S):
Test Supervisor

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.

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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.

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.

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