

Recording Reporter / Multiple Intake Reporters and Adding Call Records



Knowledge Base Article

Recording Reporter, Multiple Intake Reporters and Call Records

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Recording Reporter, Multiple Intake Reporters and Call Records

Overview

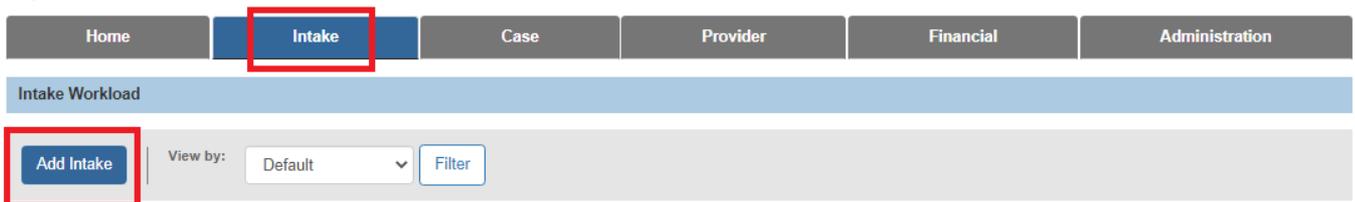
Ohio SACWIS screeners and/or workers can record one or more reporters for an intake, as well as more than one call record for a reporter.

This additional information can only be added prior to a screening decision (the intake must be in **Pending** status) **OR** after an intake has been screened-in and linked to a case.

This article shows how to add a reporter, multiple reporters, and additional call records.

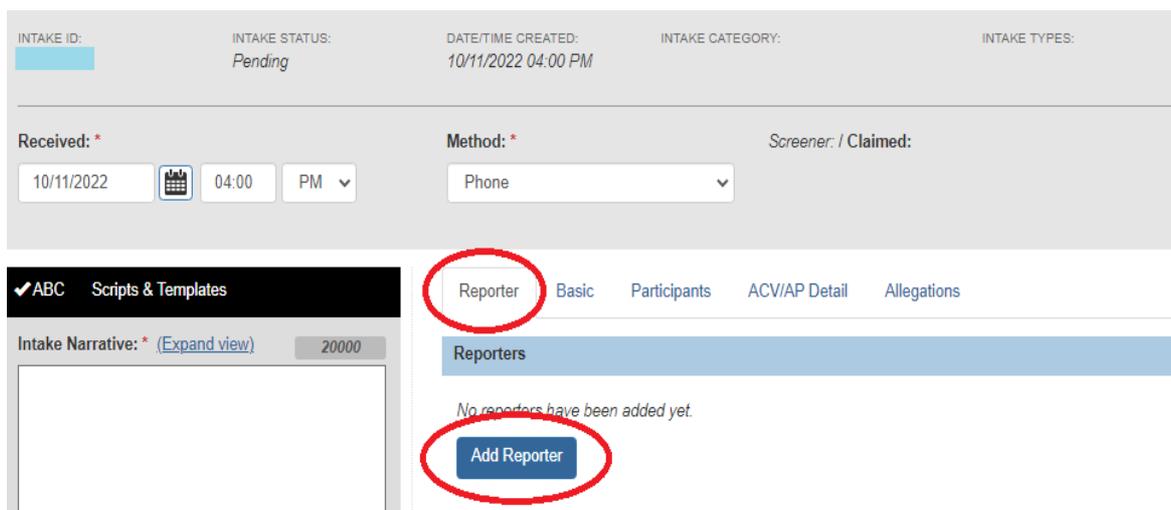
Adding an Intake

1. From the **Home** screen, click the **Intake** tab. The **Intake Workload** screen appears.
2. Click the **Add Intake** button at the bottom of the screen which opens the **Reporter** Screen.



Adding a Reporter

1. Click the **Reporter** tab.
2. Click the **Add Reporter** button.



Recording Reporter, Multiple Intake Reporters and Call Records

The **Reporter Information** screen appears (shown below). In the **Reporter Information** section, the radio button (circled in green) defaults to **Non-Mandated Reporter**. The **Contact Method** and **Date Reporter Contacted Agency** fields auto-populate with information from the **Basic** tab.

Add Reporter

Current Narrative

Current Narrative (saved) ▾

Reporter Information

Select the type of Reporter:

Non-Mandated Reporter

Mandated Reporter

Anonymous

Reporter Details

Name: *

Person ID:

Gender:

Contact: Ext:

Other Contact:

Address:

Reporter Type:

Relationship to Alleged Child Victim(s) / Child Subject(s) of Report:

Contact & Situation Knowledge

Contact Method: *

Date reporter contacted agency: *

How did the reporter learn about the situation?

Observed

Told by another party

Are there others with knowledge of the situation?

Recording Reporter, Multiple Intake Reporters and Call Records

- For a new intake, click the appropriate **reporter type** in the **Reporter Information** section.
 - If **Non-Mandated Reporter** is selected, refer to the fields shown on the previous page. (As was stated, the system defaults to the **Non-Mandated Reporter** selection.)
 - If **Anonymous Reporter** is selected, the following fields display (this is a partial screen shot).

Reporter Information

Select the type of Reporter:

Non-Mandated Reporter

Mandated Reporter

Anonymous

Anonymous Reporter Information

Gender:

Contact: Ext:

Other Contact:

Address:

Relationship to Alleged Child Victim(s) / Child Subject(s) of Report:

Recording Reporter, Multiple Intake Reporters and Call Records

- If **Mandated Reporter** is selected, the following fields display (this is a partial screen shot):

Reporter Information

Select the type of Reporter:

Non-Mandated Reporter

Mandated Reporter

Anonymous

Reporter Details

The mandated reporter was informed of the information they are entitled to receive

The mandated reporter requested the information

The mandated reporter is a solo practitioner

Name: *

Person ID:

Gender:

Contact:

Address:

Provider ID:

Organization Name:

Organization Address:

Organization Contact:

Reporter Type:

Relationship to Alleged Child Victim(s) / Child Subject(s) of Report:

Contact & Situation Knowledge

Contact Method: *

Date reporter contacted agency: *

How did the reporter learn about the situation? Observed Told by another party

Are there others with knowledge of

Recording Reporter, Multiple Intake Reporters and Call Records

- Depending on the reporter selection, complete the fields as needed.
- When complete, click the **Apply** and/or **Save** button at the bottom of the screen. **Apply** will save the data and allow you to keep editing on the page. **Save** will save and close the page and return the user to the **Reporters Tab** on the **Intake Workspace** page.

Contact & Situation Knowledge

Contact Method: * Phone

Date reporter contacted agency: * 10/12/2022 08:55 AM

How did the reporter learn about the situation?
 Observed
 Told by another party

Are there others with knowledge of the situation? *

Has the reporter addressed the concern with the Parent/Caretaker? *

Last date and time reporter had contact with the ACV(s) / CSR(s):

Apply Save Cancel

The **Reporters** screen will now display the newly entered reporter information. The reporter's name displays in the **Reporter** field at the bottom of the screen.

Intake ID: HIGH Intake Status: Complete Date/Time Created: 08/15/2022 08:45 AM Intake Category: CAN Report Intake Types: Physical Abuse

Received: * 08/15/2022 08:38 AM Method: * Phone Screener: [redacted] / Claimed: [redacted] County Children Services Board

Reporter Basic Participants ACV/AP Detail Allegations Substance Use Decision

Reporters

view Reporter 1: [redacted] (Mandated, Social Worker (Hospital/Medical))
1 contact:
Phone - 08/15/2022 08:38 AM

Recording Reporter, Multiple Intake Reporters and Call Records

Continue filling out the Intake details.

Reporter Basic Participants ACV/AP Detail Allegations

Reporters

Add Reporter

[edit](#) Reporter 1: Ned Flanders (Non-Mandated, Friend/Neighbor)

1 contact:

[Phone - 10/20/2022 09:18 AM](#)

Add Contact

When adding new allegations on the **Allegations Tab** (see next page), the **Allegation Reporter Details** screen appears. Some fields will auto-populate with data that you previously entered.

1. Choose the appropriate reporter name / call record in the **Reported By** field, if more than one reporter is available.

Note: The reporter you choose here will also appear on the **Allegation Details** screen.

2. Complete the other fields on the screen, as needed.
3. Add the Available subjects to the report.
4. Click the **Save** button at the bottom of the screen which will return you to the **Intake Workspace** screen displaying the new record and showing that your data has been saved.

Recording Reporter, Multiple Intake Reporters and Call Records

Add Allegation(s)

Allegation Reporter Details

Reported By: *

Ned Flanders (24443838) - 10/20/2022 08:34 AM

Current Narrative (saved 10/20/2022 09:30 am)

Allegation Details

Incident Date: *

10/19/2022

Date is estimated

Available Alleged Child Victims/
Child Subjects of Report:

Q	Add All	Add
Simpson, Lisa		

Selected Alleged Child Victims/
Child Subjects of Report:

Remove	Remove All	Q
		Simpson, Bart

Available Alleged Perpetrators/
Adult Subjects of Report:

Q	Add All	Add
---	---------	-----

Selected Alleged Perpetrators/
Adult Subjects of Report:

Remove	Remove All	Q
		Simpson, Homer

Available Allegation Types:

Q	Add All	Add
Physical Abuse		

Selected Allegation Types:

Remove	Remove All	Q
		Neglect

Save

Save & Add Another

Cancel

Recording Reporter, Multiple Intake Reporters and Call Records

Intake Workspace

INTAKE ID: LOW
 INTAKE STATUS: Pending
 DATE/TIME CREATED: 10/20/2022 08:34 AM
 INTAKE CATEGORY: CAN Report
 SPECIALIZED
 INTAKE TYPES: Neglect, Physical Abuse

Received: * Method: * Screener: / Claimed:

10/20/2022 08:34 A) Phone Ohio Child Welfare Agency

✓ ABC Scripts & Templates

Intake Narrative: * last saved Oct 20, 2022 0:40:53 AM
19886

The father is always drinking and gets drunk. He gets angry and abusive towards Bart and was seen strangling him.

Reporter Basic Participants ACV/IAP Detail Allegations Specialized ● Substance Use

Allegation Details

[Add Allegation](#) ✎ 🗑

edit	Neglect 10/19/2022	ACV/CSR Simpson, Bart API/ASR Simpson, Homer Reported By: Ned Flanders (24443838) - 10/20/2022 08:34 AM	<input type="checkbox"/>
edit	Physical Abuse 10/19/2022	ACV/CSR Simpson, Bart API/ASR Simpson, Homer Reported By: Ned Flanders (24443838) - 10/20/2022 08:34 AM	<input type="checkbox"/>
edit	Neglect 10/19/2022	ACV/CSR Simpson, Lisa API/ASR Simpson, Homer Reported By: Ned Flanders (24443838) - 10/20/2022 08:34 AM	<input type="checkbox"/>

Allegation Setting

Setting Type: Own Home

Address:

Search for Address
 Select Participant Address

Law Enforcement Jurisdiction is dependent on selected address.

Recording Reporter, Multiple Intake Reporters and Call Records

Recording Multiple Intake Reporters (Adding a New Reporter)

Important: As was previously stated, only workers with assignment to the case (or the worker's supervisor) can add additional information to a screened-in and linked intake.

Scenario 1: An intake has been reported, recorded, and marked as “complete.” The Screening Decision Maker screened-in the intake and it’s now linked to a case.

The assigned case worker initiates an investigation (or assessment) via an unannounced home visit and discovers that another child, who is not the **Alleged Child Victim (ACV)**, is living in the home and needs to be added to this intake as an **Other Involved Child (OIC)**.

The case worker also discovers that the father, who is living in the home, is the biological father of the ACV. The father needs to be added to this intake as both a parent and an **Alleged Perpetrator (AP)**.

In this scenario, the case worker must be added to the intake as a reporter, as well as record this newly discovered information about the family in Ohio SACWIS.

To Add a New Reporter to an Existing Intake

1. Navigate to the child’s case in Ohio SACWIS.
2. On the **Case Overview** screen, click the **Intake List** link in the **Navigation** menu on the left.

The screenshot displays the Ohio SACWIS interface. At the top, there are tabs for Home, Intake, Case, Provider, Financial, and Administration. Below these are sub-tabs for Workload, Court Calendar, and Placement Requests. A navigation menu on the left lists various options, with 'Intake List' highlighted and circled in red. The main content area shows the 'Case Overview' for an 'Ongoing Open (04/29/2022)' case. Fields include ADDRESS, CONTACT, AGENCY (County Children Services Board), PRIMARY WORKER (Assign Worker), and SUPERVISOR(S).

Recording Reporter, Multiple Intake Reporters and Call Records

The **Current Case Episode Intake List** screen appears with historical information displaying below it.

1. In the **Intake ID** column, click the appropriate **Intake ID** link where the reporter needs to be added.

The screenshot shows a software interface with a top navigation bar containing 'Home', 'Intake', 'Case' (selected), 'Provider', 'Financial', and 'Administration'. Below this is a sub-navigation bar with 'Workload', 'Court Calendar', and 'Placement Requests'. A left sidebar contains a menu with options like 'Case Overview', 'Intake List', 'Safety Assessment', etc. The main content area shows 'CASE NAME / ID: Ongoing Open (04/29/2022)'. Below this is the 'Current Case Episode Intake List' table:

Intake ID	Status	Decision Date - Time	Category	Type	Initiation Date/Time	Case Disposition Disposition Date	Investigation/ Assessment Completion Date	Agency Name	
1234567 reports	Screened In	04/29/2022 09:12 AM	CA/N Report	Sexual Abuse	04/29/2022 10:43 AM			County Children Services Board	unlink

Below the table are buttons for 'Record Disposition(s)' and 'Change Disposition(s)'. Underneath is the 'Historical Case Episode(s) Intake List' section, which is currently empty.

The **Basic Information** screen (**Basic** tab) appears.

2. Click the **Reporter** tab (to add the case worker as a reporter mentioned in the scenario above).
3. Click the **Add Reporter** button.

Recording Reporter, Multiple Intake Reporters and Call Records

Example of what the screen looks like showing **only the initial reporter**.

The screenshot displays a software interface for recording a call. At the top, there are fields for 'Received: *' (10/12/2022, 03:29 PM), 'Method: *' (Phone), and 'Screener: [redacted] / Claimed: [redacted]'. Below this, a navigation bar includes 'Scripts & Templates' and tabs for 'Reporter', 'Basic', 'Participants', 'ACV/AP Detail', and 'Allegations'. The 'Reporter' tab is active, showing a section titled 'Reporters' with a blue header. A red circle highlights a blue 'Add Reporter' button. Below the button, there is an 'edit' link and a list of reporters: 'Reporter 1: (Anonymous, Anonymous)' with '1 contact: Phone - 10/12/2022 03:29 PM' and an 'Add Contact' button. On the left side, there is a sidebar with 'Intake Narrative: *' (last saved Oct 12, 2022 4:16:51 PM, 19996) and a text area containing the word 'Test'.

4. In the **Reporter Information** section on next page, click the appropriate radio button. To complete the scenario above, choose **Mandated Reporter** for the case worker.
5. In the **Reporter Type** field drop-down list, choose the appropriate type (**PCSA Employee** for the scenario), as shown in the screen shot below.

Important: If the **Mandated Reporter** radio button is selected, along with **PCSA Employee** in the **Reporter Type** field, the system **automatically displays** the **Person ID** information for the logged-in case worker. However, this information can be changed.

Recording Reporter, Multiple Intake Reporters and Call Records

Reporter Information

Select the type of Reporter:

Non-mandated reporter

Mandated Reporter

And...

Reporter Details

The mandated reporter was informed of the information they are entitled to receive

The mandated reporter requested the information

The mandated reporter is a solo practitioner

Name: * **Search Person**

Person ID:

Gender:

Contact:

Address:

Provider ID:

Organization Name:

Organization Address:

Organization Contact:

Reporter Type:

Relationship to Alleged Child Victim(s) / Child Subject(s) of Report:

Note: A dropdown menu is open for the Reporter Type field, showing a list of professions. 'PCSA Employee' is highlighted and circled in red.

6. If a name is not already auto-populated in the **Reporter Name** field, click the **Search Person** button to locate the reporter's name. (In the scenario, it would be the case worker's name.)
7. Complete the remaining fields on the screen, as needed.
8. If needed, edit the **Contact Method** field.
9. If needed, edit the **Date Reporter Contacted Agency** field.
10. When complete, click the **OK** button at the bottom of the screen.

Recording Reporter, Multiple Intake Reporters and Call Records

Current Narrative

Current Narrative (saved 10/12/2022 04:16 pm) ▾

Reporter Information

Select the type of Reporter:

- Non-Mandated Reporter
 Mandated Reporter
 Anonymous

Reporter Details

- The mandated reporter was informed of the information they are entitled to receive
 The mandated reporter requested the information
 The mandated reporter is a solo practitioner

Name: *

Search Person

Person ID:

Gender:

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:

Caseworker

First Name:

Bob

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

Search

Clear Form

Return

Recording Reporter, Multiple Intake Reporters and Call Records

Important: Any information added to an intake after the screening decision has been made is delineated by the green caret [^] symbol.

11. Repeat the steps above to add additional intake reporters.

Adding Additional Information to an Existing Screened-In Intake

See KBA Adding Information to Existing Intake

Recording Multiple Intake Call Records for a Reporter (Adding a Call Record for a Reporter)

Information can be added to an intake only if it is in **Pending** status or after an intake has been screened-in and linked to a case. Also, only workers with assignment to the case (or the worker's supervisor) can add additional information to a screened-in and linked intake.

Scenario 2: The original reporter calls back on day two (before the Safety Assessment is approved) and provides additional information about a past concern regarding possible neglect of the ACV by Father Simpson. This allegation can be added to the existing intake or recorded as a new intake (following agency procedures and applicable OAC rules).

To record an additional call record for a reporter, complete the following steps:

Note: If you need to see screen shots, view the steps earlier in this Knowledge Base Article.

1. Navigate to the child's case in Ohio SACWIS.
2. On the **Case Overview** screen, click the **Intake List** link in the menu on the left.
3. In the **Intake ID** column, click the appropriate **Intake ID** link. The **Basic Information** tab appears.
4. Click the **Reporter** tab. The **Reporters** screen appears.
5. Click the **Add Contact** button.

Recording Reporter, Multiple Intake Reporters and Call Records

The screenshot shows a web interface for managing reporters. At the top, there is a navigation bar with tabs: 'Reporter' (circled in red), 'Basic', 'Participants', 'ACV/AP Detail', 'Allegations', 'Specialized', 'Substance Use', and 'Decision'. Below the navigation bar is a blue header labeled 'Reporters'. Underneath is a blue button labeled 'Add Reporter'. The main content area displays two reporter entries. The first entry is 'Reporter 1: Robert Reporter (Non-Mandated, Friend/Neighbor)' with a 'view' link. It shows '1 contact:' followed by 'Phone - 10/13/2022 8:28 AM' and a circled 'Add Contact' button. The second entry is 'Reporter 2: [*] Ned Flanders (Non-Mandated, Friend/Neighbor)' with an 'edit' link. It shows '1 contact:' followed by 'Phone - 10/13/2022 10:47 AM' and a circled 'Add Contact' button.

The **Situation Knowledge Source** screen appears.

6. Enter the contact method with how the reporter contacted the agency.
7. Enter the date when the reporter contacted the agency.
8. Enter the other referral source information into the fields, as needed.

Recording Reporter, Multiple Intake Reporters and Call Records

Add Contact for Reporter 2:

Current Narrative

Current Narrative (saved 10/13/2022 10:56 am) ▾

Contact & Situation Knowledge

Contact Method: *

Date reporter contacted agency: *

How did the reporter learn about the situation?
 Observed
 Told by another party

Are there others with knowledge of the situation?

Has the reporter addressed the concern with the Parent/Caretaker?

Last date and time reporter had contact with the ACV(s) / CSR(s):

9. Click the **OK** button at the bottom of the screen.

The **Reporters** screen appears.

Using information from Scenario 2, the **Reporters** screen now shows Reporter 1 with one call record and Reporter 2 with two call records as shown below.

Reporter Basic Participants ACV/AP Detail Allegations Specialized Substance Use Decision

Reporters

[view](#) Reporter 1: Robert Reporter (Non-Mandated, Friend/Neighbor)
1 contact:
[Phone - 10/13/2022 08:26 AM](#)

[edit](#) Reporter 2: [*] Ned Flanders (Non-Mandated, Friend/Neighbor)
2 contacts:
[Phone - 10/13/2022 10:47 AM](#)
[Phone - 10/13/2022 11:09 AM](#)

Recording Reporter, Multiple Intake Reporters and Call Records

10. Click the **Participants** tab. The **Participants** screen appears.

11. To record the addition of the appropriate role, add the available roles into the selected row.

12. Click the **OK** button.

The screenshot displays the 'Participant Detail' form. At the top, there is a checkbox for 'Participant is unknown or partially known'. Below this are fields for 'Person ID', 'First Name' (containing 'Maggio'), 'Middle Name', and 'Last Name' (containing 'Simpson'). There are also fields for 'DOB' with options for 'Estimated DOB' and 'DOB Unknown', and 'Age Range' with 'From Age' and 'To Age' sub-fields. A 'Gender' dropdown menu is present. The 'Race' section includes a 'Hispanic/Latino' dropdown and a 'Select any that apply' list with checkboxes for American Indian, Black/African American, White, Alaskan Native, Asian, Native Hawaiian, Other Pacific Islander, Multi-racial (one or more races unknown), Declined, Unable to Determine, Unknown, and Multi-racial (all races unknown). An 'Address' field and a 'Contact type' dropdown are also visible.

At the bottom of the form, there is a table for role selection:

Available Roles:	Selected Roles:
<ul style="list-style-type: none">Alleged Child Victim (ACV)Alleged Perpetrator (AP)CaretakerChild Daycare ProviderChild/Youth Subject of a Non-CA... (Child/Youth Subject)CustodianGroup Home Staff	<ul style="list-style-type: none">Other involved child (OIC)

Red circles highlight the 'Available Roles' list, the 'Add' button, and the 'Other involved child (OIC)' role in the 'Selected Roles' column.

Recording Reporter, Multiple Intake Reporters and Call Records

The **Allegation Details** screen now displays the multiple reporter and multiple call records.

Reporter Basic Participants ACV/AP Details **Allegations** Specialized Substance Use Decision

Allegation Details

[Add Allegation](#)  

Neglect 10/12/2022	ACV/CSR Simpson, Bart AP/ASR Simpson, Homer Reported By: Robert Reporter (24476110) - 10/13/2022 08:26 AM	
edit (*) Physical Abuse 10/13/2022	ACV/CSR Simpson, Bart AP/ASR Simpson, Homer Reported By: Ned Flanders (24476111) - 10/13/2022 10:47 AM	<input type="checkbox"/>
Neglect 10/12/2022	ACV/CSR Simpson, Lisa AP/ASR Simpson, Homer Reported By: Robert Reporter (24476110) - 10/13/2022 08:26 AM	

Recording Reporter, Multiple Intake Reporters and Call Records

13. Navigate to the **Basic Information** screen (**Basic** tab)
14. Record information in the **Post-Decision Narrative (Amendment)** section.
15. Click the **Save** button at bottom of screen.

Scripts & Templates

Intake Narrative: * [Expand view](#) last saved Oct 13, 2022 10:55:44 AM

There is abuse and neglect. The father is always drinking and cursing at the children.

Post Decision Narrative Amendments:

10/13/2022 10:56 AM - [Caseworker](#) The father is physically abusing the son.

Type Details Here

Reports **Basic** Participants ACV/AP Detail Allegations Specialized Substance Use Decision

Intake Type

Intake Workload Name:

Intake Category: CA/N Report

Intake Types:

Q	Add All	Add
Baby Doe/Disabled Infant		
Emotional Maltreatment		
Medical Neglect		
Physical Abuse Shaken Baby		
Sexual Abuse		

Selected Types:

Remove	Remove All	Q
		Neglect
		Physical Abuse

Other Intake Designations

Does this report allege human trafficking of a child or children? Not Answered No Yes

Does this report allege a child fatality or near fatality? Not Answered No Yes

Does this report require a Specialized Assessment/Investigation?

Does this report require Third Party involvement due to a potential conflict of interest?

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