

# **Updating Unknown Participants in Intake**



**Knowledge Base Article**

# Updating Unknown Participants in Intake

## Table of Contents

Overview .....	3
Completing a Person Search .....	4
Updating an Unknown Person Record .....	6

# Updating Unknown Participants in Intake

## Overview

Sometimes when an Intake is received, the referral source (RS) does not know the identity of the person they are reporting. In these cases, the Intake worker adds identifying information about the reported person into Ohio SACWIS and that person becomes an **unknown participant** associated with the Intake.

When adding participants to an intake, the Intake worker selects the **Search & Add Participants** button on the **Participants** tab. If the worker does not know any identifying information about the person, they can instead click the **Add Participant** button. On this page, the worker can then click the **Participant is unknown or partially known** checkbox of the **Participant Details** page.

After the intake has been **Completed** has been recorded (saved), Ohio SACWIS automatically creates a **Person Record** and **Person ID** for this unknown participant. The unknown person's record then shows a first and last name similar to this:

**Unknown – Intake 1234567, Unknown – Intake 1234567**

The number that appears identifies the unknown person as a participant.

When an unknown participant's identity is confirmed by an agency, there are two ways by which this person's data can be updated in Ohio SACWIS. The process you will use is determined by whether or not the now-known person already has a Person Record within the system.

When the Unknown Person Becomes Known, and...	Method for Adding Known Person
There is <b>NO</b> person record for this Intake participant...	Update the unknown person record
There <b>IS</b> a person record for this Intake participant...	Merge the known person record with the unknown person record created at the time of the Intake

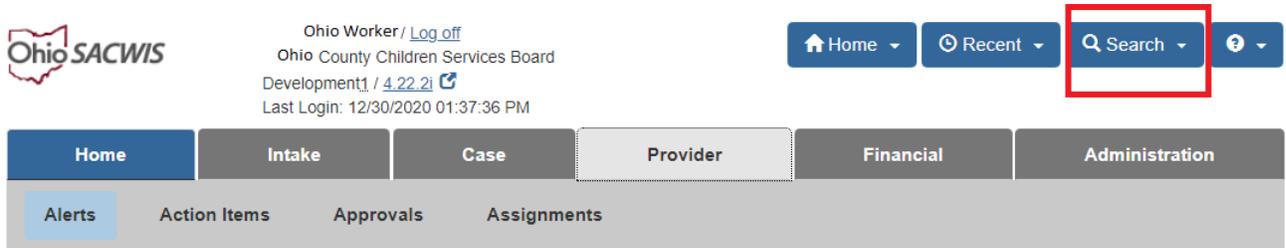
**Note:** Both processes are discussed in detail below.

# Updating Unknown Participants in Intake

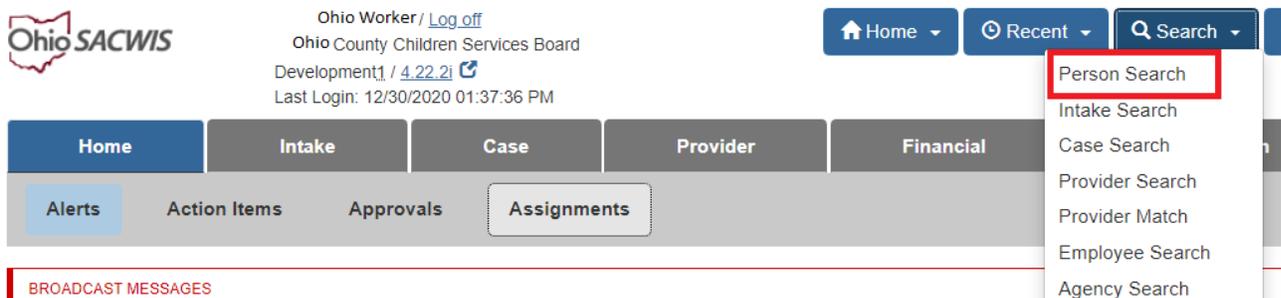
## Completing a Person Search

When the unknown participant's identity becomes known, you will first complete a person search as follows to see if that person already exists in the system:

1. On the **Home** screen, click the **Search** link.



2. Click the **Person Search** link.



The **Search for Person** screen appears.

3. Enter search information into the appropriate fields.
4. Click the **Search** button.

# Updating Unknown Participants in Intake

- Person Search
- Intake Search
- Case Search
- Provider Search
- Provider Match
- Employee Search
- Agency Search

## Search For Person

Person ID:  ~ OR ~ SSN:

*Note: If Person ID or SSN are entered, all other search criteria will be ignored*

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OR

Last Name:  First Name:  Gender:

Middle Name:

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:

+ AKA/Nicknames

*Fewer Results More Results*

The results appear in the **Person Search Results** section.

- If the Person Record you are searching for appears, click the **Edit** link.
- Then, follow the steps in the **Merging Known and Unknown Person Records** section later in this document.

## Person Search Results

Result(s) 1 to 1 of 1 / Page 1 of 1  
 Include only active case members

	Person Name / ID	Address	Gender	(Age) DOB	Active Case
<a href="#">view</a> <a href="#">edit</a>	Sacwis, Susie / 123456	123 Test Rd, Test Oh 12345	Female	(15) 01/01/2009	Yes

# Updating Unknown Participants in Intake

The person's **Person Information** screen appears.

7. If the person's record is not found in Ohio SACWIS, follow the steps in the **Updating an Unknown Person Record** section below.

## Updating an Unknown Person Record

To modify an unknown person record, complete the following steps:

1. Navigate to the record via the **Intake Workload** screen.
2. Click the appropriate **Intake ID** link.



The screenshot shows the 'Intake Workload' screen. At the top, there are navigation tabs: Home, Intake (highlighted), Case, Provider, Financial, and Administration. Below the tabs is a sub-header 'Intake Workload'. There is an 'Add Intake' button and a 'View by:' dropdown menu set to 'Default', with a 'Filter' button. Below this, it says 'Showing 1 intakes (Default view):'. A table displays the following data:

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screeener Name SDM Name	Status	Status Date/Time	
<a href="#">view</a> <a href="#">edit</a>		123456 HIGH 00:00 remaining		Family in Need of Services NEICE	04/10/2024 9:34 AM		Pending	04/10/2024 9:34 AM	  

At the bottom left of the table area, there is an 'Add Intake' button.

The **Basic Information** screen appears.

3. Click the **Participants** tab.
4. Click the **Name** link for the unknown person.
5. Search for the appropriate person.

# Updating Unknown Participants in Intake

INTAKE ID: **HIGH**      INTAKE STATUS: *Pending*      DATE/TIME CREATED: 04/10/2024 09:34 AM      INTAKE CATEGORY: *Family in Need of Services*      INTAKE TYPES: *ICPC* NEICE

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Received: \*      Method: \*      Screener: *County Children Services Board*

04/10/2024      09:34 AM      Other Electronic Method

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ABC Scripts & Templates

Intake Narrative: \* *last saved May 16, 2024 10:36:38 AM* 19911

Request from Arizona for Relative/Kinship placement

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Reporter      Basic      **Participants**

**Participants**

Search & Add Participants      Participant Roles

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[edit](#)      [search](#)      **Child/Youth Subject of a Non-CA/N (Child/Youth Subject)**  
Female 2, 04/03/2022 |

---

[edit](#)      [search](#) Unknown - intake 22915163, Unknown - intake 2

The **Person Information** screen (**Person Record**) appears.

6. Update the fields, as needed, including the **First Name** and **Last Name** fields.
7. When complete, click the **Save** button.

NAME / ID: **Test, Child / 121212**      Female Age 9 , DOB 05/07/2015      PROVIDER

---

Basic      Demographics      Address      Additional      Characteristics      Safety Hazard      Confidential Information

**Person Information**

Prefix:

First Name: \*       Middle Name:

Last Name: \*       Suffix:      

Gender:  Male  Female      SSN:        Retain  Add/Edit

No SSN Exists

DOB:       Age:        Estimated DOB       DOB Unknown

Hair Color:       Eye Color:

Sexual Orientation:

Deceased      Deceased Date:       Age At Time Of Death:        Deceased Date Unknown

Driver's License #:       Issue State:       Expiration:

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**AKA Names**

Prefix	First Name	Middle Name	Last Name	Suffix	AKA Type
<input type="button" value="Add AKA"/>					

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## Updating Unknown Participants in Intake

### Important:

- The person record linked to the Intake now contains the updated information.
- If the person was added as a member of the case, this information will also be updated on the **Case Participant** screen.
- The **Intake Participants** tab will continue to show the name information that was entered at the time of the Intake. From the example: Unknown – Intake 1234567, Unknown – Intake 1234567, and not the newly added name.
- The updated name appears with a green caret (^) symbol. The symbol indicates that when the intake was reported, the referral source did not know the name of the person.

### Merging Known and Unknown Person Records

Refer to the **Identifying and Merging Duplicate Person Records** Knowledge Base Article for specific steps on how to merge people records in Ohio SACWIS.

### Important:

- The new person information will appear on the **Case Participants** screen if the Person ID was added.
- On the **Intake** screen, the name information that was entered at the time of the intake completion will not change, even if the unknown person is merged.
- The **Intake** screen is the only place in the system where the correct intake participant will still appear as follows: Unknown – Intake 1000213, Unknown – Intake 1000213.

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