

# **Navigating Matching Conference Functionality**



**Knowledge Base Article**

# Navigating Matching Conference Functionality

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# Navigating Matching Conference Functionality

## Overview

This Knowledge Base Article discusses how to use the **Linked Inquiries** functionality, conduct a **Potential Adoptive Families Search**, create a child's **Matching Conference** record, and generate the related reports in Ohio SACWIS.

## Navigating to the Linked Inquiries Screen

To view the **Linked Inquiries** made regarding a child who is available for adoption, complete the following steps:

1. From the Ohio SACWIS **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Select the appropriate **Case ID** link. The **Case Overview** screen appears.

**Note:** If you know the **Case ID** number, you can also use the **Search** link to navigate to the **Case Overview** screen.

4. Click the **Potential Adoptive Families** link in the **Navigation** menu.

# Navigating Matching Conference Functionality

The screenshot displays a web application interface for case management. At the top, a navigation bar includes tabs for Home, Intake, Case, Provider, Financial, and Administration. Below this, a secondary bar contains Workload, Court Calendar, and Placement Requests. A left-hand sidebar lists various case management functions, with 'Potential Adoptive Families' highlighted. The main content area shows details for an adoption case, including case name, address, agency, and primary worker. A red alert icon is present next to a message about pre-adoptive staffing.

**Case Overview**

- Activity Log
- Attorney Communication
- Intake List
- Forms/Notices
- Substance Abuse Screening
- Ongoing Case A/I
- Specialized A/I Tool
- Law Enforcement
- Justification/Waiver
- Case Services
- Legal Actions
- Legal Custody/Status
- Living Arrangement / Guardianship
- Initial Removal
- Potential Adoptive Families**
- Child Recruitment
- Pre-Adoptive
- Staffing/Matching Conference
- Placement/CCA
- Residential Treatment

**Case Details:**

- CASE NAME / ID: Adoption Open (05/12/2021)
- ADDRESS: [Redacted]
- CONTACT: [Redacted]
- AGENCY: County Children Services Board
- PRIMARY WORKER: [Redacted]
- SUPERVISOR(S): [Redacted]

**Case Actions:**

- [View Member Details](#)
- [Access Original Case](#)
- [Program Categories](#)
- [Case Status History](#)
- [View Adoption Subsidies](#)

**Action Items:**

- 12/17/2019 **Pre-Adoptive Staffing is due for [Redacted], should be created by [Redacted]**

Person Name / ID: [Redacted]

The **Linked Inquiries** screen appears.

# Navigating Matching Conference Functionality

## Viewing Linked Inquiries

1. Click the **Inquiry ID** hyperlink to view the Inquiry record.

The screenshot shows the 'Linked Inquiries' section of a web application. On the left is a navigation menu with various case management options. The main content area has a header for 'Adoption' with the date 'Open (05/12/2021)'. Below this are two tabs: 'Linked Inquiries' (selected) and 'Adoptive Families Search'. The 'Linked Inquiries Filter Criteria' section includes dropdowns for 'Member Status' (Active Adoption Members), 'Children in Adoption Case', and 'Sort Results By'. There are also radio buttons for 'Created in Error' (Exclude/Include). Below the filters is a table titled 'Linked Inquiry Records' with 8 columns: Inquiry ID, Child Name/Person ID, Inquiry Date, Inquirer Name, Relationship to Inquirer, Provider Type, Provider ID /Status, and Created in Error. Two red circles highlight the 'Inquiry ID' and 'Provider ID /Status' columns in the first row of the table. The first row shows an Inquiry ID, a Person ID, a date of 07/06/2022, a Non-related Child, Adoptive Home-Out of State, and a Provider ID /Status link.

Inquiry ID	Child Name/Person ID	Inquiry Date	Inquirer Name	Relationship to Inquirer	Provider Type	Provider ID /Status	Created in Error
[Red Circle]	[Redacted]	07/06/2022	[Redacted]	Non-related Child	Adoptive Home-Out of State	[Redacted] / Active [Red Circle]	
[Redacted]	[Redacted]	02/12/2020	[Redacted]	Non-related Child	Kinship Care-Non Relative	[Redacted] / Active	

**Note:** If the **Inquirer** is a member of a **Provider** record, a **Provider ID** hyperlink displays.

**Important:** For the **Provider ID** hyperlink to display, the **Person ID** that is linked to the **Inquiry** must be the same **Person ID** that is linked to the **Provider** record.

2. Click the **Provider ID** hyperlink to view the **Provider** record.

# Navigating Matching Conference Functionality

## Searching for Potential Adoptive Families

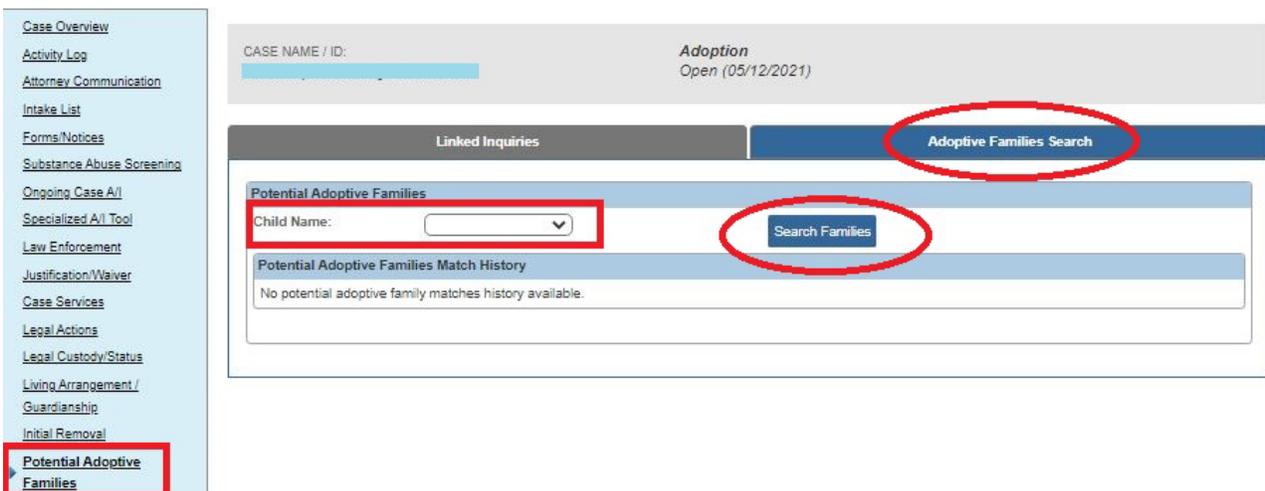
A **Potential Adoptive Family** search can be completed for a child as many times as needed. However, each search adds a record / row to the search criteria history that is automatically date and time stamped by the system. If no **Potential Adoptive Family Match History** is available for the child (i.e. no searches have been completed in Ohio SACWIS) the following screen message appears:



The screenshot shows the 'Adoptive Families Search' interface. At the top, there are two tabs: 'Linked Inquiries' and 'Adoptive Families Search'. Below the tabs, there is a section titled 'Potential Adoptive Families' with a 'Child Name' dropdown menu and a 'Search Families' button. Below this is a section titled 'Potential Adoptive Families Match History' which contains the message: 'No potential adoptive family matches history available.' A green box highlights the match history section.

To search for potential adoptive families for a child, complete the following steps:

1. Navigate to the **Adoptive Families Search** screen
  - Click the **Potential Adoptive Families** link from the **Case Overview** page
  - Click the **Adoptive Families Search** tab



The screenshot shows the 'Case Overview' page. At the top, there is a header with 'CASE NAME / ID:' and 'Adoption Open (05/12/2021)'. Below the header, there are two tabs: 'Linked Inquiries' and 'Adoptive Families Search'. The 'Adoptive Families Search' tab is selected and circled in red. Below the tabs, there is a section titled 'Potential Adoptive Families' with a 'Child Name' dropdown menu and a 'Search Families' button. Both the dropdown menu and the button are circled in red. Below this is a section titled 'Potential Adoptive Families Match History' which contains the message: 'No potential adoptive family matches history available.' The 'Potential Adoptive Families' link in the left sidebar is also circled in red.

2. In the **Child Name** field, select the appropriate child's name.
3. Click the **Search Families** button.

# Navigating Matching Conference Functionality

The **Search for Provider Match** screen (**Provider Match** screen) appears.

The screenshot displays the 'Search for Provider Match' interface. At the top, there is a navigation bar with tabs for Home, Intake, Case, **Provider** (selected), Financial, and Administration. Below this is a sub-menu with options: Workload, Provider Search, **Provider Match** (selected), Recruitment, Inquiry, Training, Contracts, and Agency Certifications. A 'KCCP Pre-Screening Tool' link is also visible.

The main search area is titled 'Search For Provider Match'. It includes the following fields and options:

- Service Category:** Placement
- Service Type:** Approved Adoptive Home (dropdown menu)
- Search Date:** 11/03/2022 (calendar icon)
- With Available Vacancies
- Child has a kinship relationship with the provider

Below these are two selection boxes:

- Available Counties:** A list with search and add buttons. Visible counties include Ashtabula, Athens, Auglaize, Belmont, Brown, Butler, Carroll, and Champaign.
- Selected Counties:** A box with a remove button and search icon, currently empty.

Other filters include:

- OR School District:** (dropdown menu)
- Agency Type:** PUBLIC
- Agency:** County Children Services Board (dropdown menu)
- Provider ID:** (text input field)

A note states: *Note: If Provider ID is entered, criteria such as Provider Name, Member Name, Counties, School District, and Provider Skills will be ignored*

Additional search criteria:

- Provider Name:** (text input field)
- OR**
- Member Last Name:** (text input field)
- Member First Name:** (text input field)
- Member Middle Name:** (text input field)

Expandable sections include:

- Child Information & Characteristics** (dropdown arrow)
- Provider Skills** (dropdown arrow)

At the bottom, there are search controls:

- Name Match Precision:** Returns results matching entered names including AKA names/nicknames. A green bar indicates the current state, with '+ AKA/Nicknames' and 'Fewer Results' / 'More Results' options.
- Sort By:** Provider Name (A-Z) (dropdown menu)
- Buttons:** Search, Clear Form, Cancel

## Navigating Matching Conference Functionality

4. Complete the **Search** fields as needed.

**Important:**

- Refer to **O.R.C. Rule 5101:2-48-13 Non-Discrimination Requirements for Adoptive Placements** for clarification regarding MEPA compliance standards.
- The specific criteria you select to perform the search will be retained in Ohio SACWIS under the **View Criteria** link.
- As shown in green, section links can be expanded to display additional fields around **Child Information & Characteristics** as well as **Provider Skills**. Choose additional Child Characteristics that match the youth and skills desired in an adoptive parent by selecting a value from the **Available** column, then click **Add**, which will place the value in the **Selected** column.

# Navigating Matching Conference Functionality

**Child Information & Characteristics** ^

Available Provider Characteristics Based on Child Information:

Search	Add
ADHD	
AIDS	
Active	
Afraid of Sleeping in the Dark	
Afraid of the Dark	
Alcohol - Abuse	
Alcohol - Addiction/Dependence	

Selected Provider Characteristics Based on Child Information:

Remove	Search
	Adjustment Disorder
	Anxious
	Calm/Laid Back
	Cognitive Functioning: Average
	Daily Medication required
	Depression
	Eager to Please

Child Gender:

Child Age Range:  -

From Age To Age

Child Language:

Race: Select any that apply

<input type="checkbox"/> American Indian	<input type="checkbox"/> Asian	<input type="checkbox"/> Alaskan Native
<input type="checkbox"/> Black/African American	<input type="checkbox"/> Native Hawaiian	<input type="checkbox"/> No Preference/All
<input checked="" type="checkbox"/> White	<input type="checkbox"/> Other Pacific Islander	<input type="checkbox"/> Unable to Determine
<input type="checkbox"/> Multi-racial (one or more races unknown)	<input type="checkbox"/> Multi-racial (all races unknown)	

**Provider Skills** ^

Available Provider Member Skills:

Search	Add
Behavior Modification	
Braille	
C,P,R.	
Dentist	
First Aid Training	
Licensed Physical Therapist	
Mapping Default	

Selected Provider Member Skills:

Remove	Search
	Educator

5. When done entering search criteria, click the **Search** button.

The filtered results appear in the **Provider Match Search Results** section of the screen.

6. Click the **View** link in the appropriate row, to view the **Provider** details.

**Note:** The original search results display all of the **Service Descriptions** per provider. Therefore, if one provider has five service descriptions then five records will appear in the grid displaying the same provider name. This could make it look like there are more providers returned in your search results.

# Navigating Matching Conference Functionality

The **View** link is designed to provide additional information about each provider. The steps below provide more details on how to identify a potential adoptive placement match.

Search Results

[View Results in Map](#) [Collapse Services](#) [Expand Services](#)

Result(s) 1 to 6 of 6 / Page 1 of 1 Results per page:  [Go](#)

	Provider Name / ID	Provider Category	Provider Status	Current Primary Address	Current Vacancies
<a href="#">view</a>		HOME	ACTIVE		1
<a href="#">View Services</a> ^					
Ohio Department of Job and Family Services:					
Adoptive Placement - Accessibility					
Adoptive Placement - Legal Risk					
Adoptive Placement					
Adoptive Placement - Drug Exposed					
Adoptive Placement - Medical Apparatus					
<a href="#">view</a>		HOME	ACTIVE		0
<a href="#">View Services</a> ^					
Ohio Department of Job and Family Services:					
Adoptive Placement					
Adoptive Placement - Drug Exposed					
Adoptive Placement - Accessibility					
Adoptive Placement - Medical Apparatus					
Adoptive Placement - Legal Risk					
<a href="#">view</a>		HOME	ACTIVE		0
<a href="#">View Services</a> ^					
Ohio Department of Job and Family Services:					
Adoptive Placement					
Adoptive Placement - Medical Apparatus					
Adoptive Placement - Legal Risk					
Adoptive Placement - Accessibility					
Adoptive Placement - Drug Exposed					

The **Provider Overview** screen for the selected provider appears.

7. When done viewing, click the **Close** button at the bottom of the screen.

# Navigating Matching Conference Functionality

Home Intake Case **Provider** Financial Administration

Workload **Provider Search** Provider Match Recruitment Inquiry Training Contracts Agency Certifications KCCP Pre-Screening Tool

PROVIDER NAME / ID:  CATEGORY / STATUS: **Home / Active**

PRIMARY ADDRESS:  PRIMARY CONTACT: Cell:

**Provider Actions**

[Provider Information](#) | [Linked 1692 Providers](#)

**Approval/Certification Spans**

Provider Type	Level of Care	Approval/Certification Period	Agency	Certifying Entity
Foster Care	Family Foster Home	05/11/2021 - 05/10/2023	County Children Services Board	ODJFS
Adoptive Care		05/11/2021 - 05/10/2023	County Children Services Board	ODJFS

**Approval Information**

No Current Approval Information Available

**Action Items** **Provider Alerts** **Assignments**

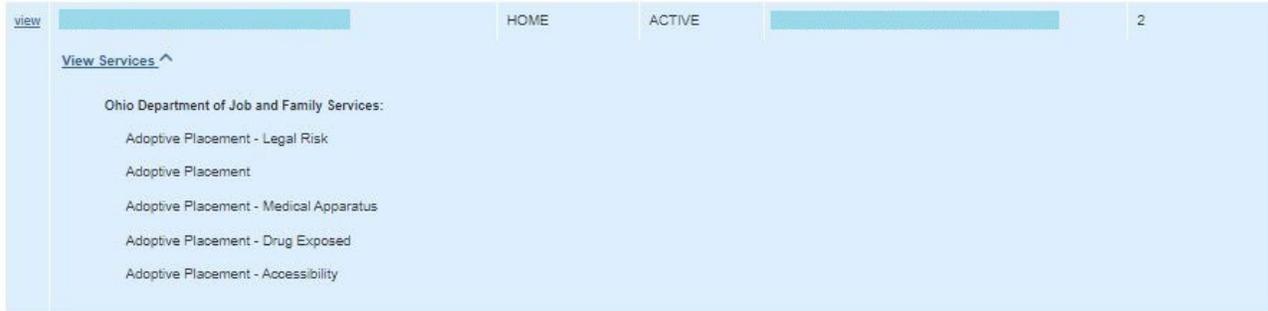
No Action Items Found

LAST UPDATED AS OF:  
FAMILY LISTING NARRATIVE:

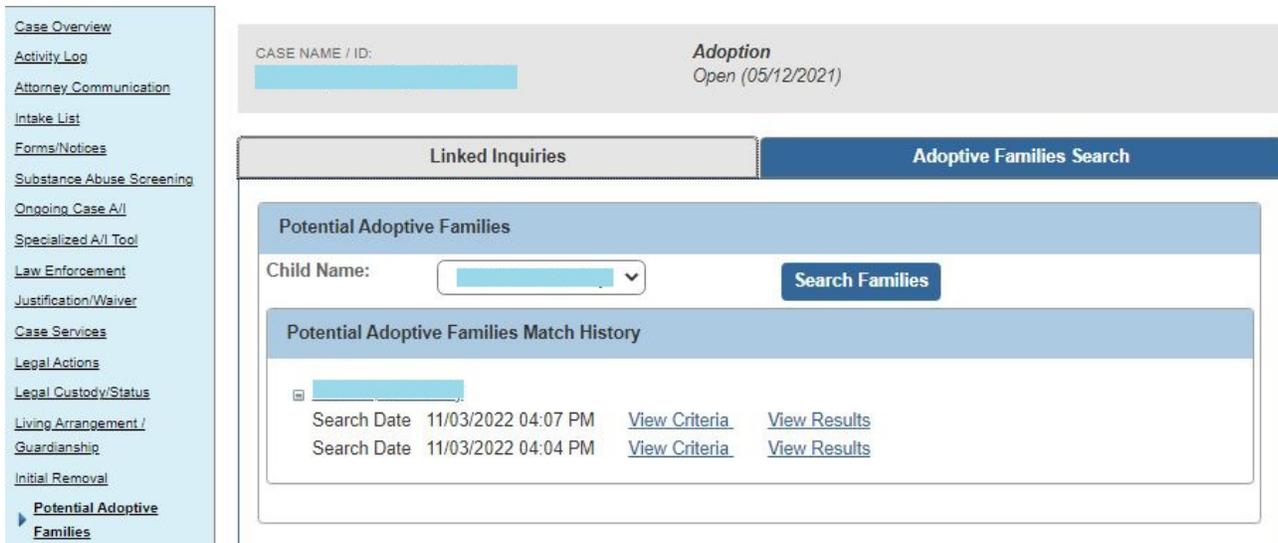
The **Provider Match Search Criteria** screen (**Provider Information** screen) appears.

# Navigating Matching Conference Functionality

8. Click the **View** link for additional records as needed to gain additional information about the desired providers.
9. When done viewing provider specifics, click the **OK** button at the bottom of the screen.



The **Potential Adoptive Families Search** screen appears. If a potential adoptive family search is now available, the screen appears as shown:



As discussed in more detail later, when the child's name link is expanded, the system displays each search with a date and time stamp (shown in green).

# Navigating Matching Conference Functionality

Potential Adoptive Families

Child Name:  Search Families

Potential Adoptive Families Match History

<input type="text"/>	Search Date 11/03/2022 04:07 PM	<a href="#">View Criteria</a>	<a href="#">View Results</a>
	Search Date 11/03/2022 04:04 PM	<a href="#">View Criteria</a>	<a href="#">View Results</a>

# Navigating Matching Conference Functionality

## Viewing Existing Search Criteria

1. On the **Potential Adoptive Families Search** screen, if a potential adoptive search(es) have been completed, click the desired child's name to expand the link.

The **View Criteria** link and **View Results** link appear.

2. To view criteria about an existing search, click the **View Criteria** link in the appropriate row.

The screenshot displays the 'Adoptive Families Search' section of a web application. At the top, there is a header with 'CASE NAME / ID:' followed by a redacted name and 'Adoption Open (05/12/2021)'. Below this, there are two tabs: 'Linked Inquiries' and 'Adoptive Families Search'. The 'Adoptive Families Search' tab is active. Underneath, there is a section titled 'Potential Adoptive Families' with a 'Child Name:' dropdown menu and a 'Search Families' button. Below that is a 'Potential Adoptive Families Match History' section. This section contains a table with two rows of search results. Each row includes a search date and time, and two links: 'View Criteria' and 'View Results'. The 'View Criteria' link in the first row is circled in red.

Search Date	View Criteria	View Results
11/03/2022 04:07 PM	<a href="#">View Criteria</a>	<a href="#">View Results</a>
11/03/2022 04:04 PM	<a href="#">View Criteria</a>	<a href="#">View Results</a>

The **Potential Adoptive Families Search Criteria** screen appears.

# Navigating Matching Conference Functionality

CASE NAME / ID: [REDACTED] Adoption / Open (05/12/2021)

Potential Adoptive Families Search Criteria

Child Name: [REDACTED] Search Date: 11/03/2022 04:07 PM

**Provider Information**

Service Category: Placement  
Service Type: Approved Adoptive Home  
Agency Type: Public  
Agency: [REDACTED] County Children Services Board  
By Available Capacity: Not Checked  
Selected and Nearby Counties: [REDACTED]  
School District: [REDACTED]

**Additional Search Criteria**

Provider ID: [REDACTED] Provider Name: [REDACTED]  
Member First Name: [REDACTED] Member Last Name: [REDACTED]  
Sounds Like: Not Checked  
Selected Skills: [REDACTED]

**Child Information**

Gender: Female From Age: 15 To Age: [REDACTED]  
Language: [REDACTED]

**Additional Search Criteria**

Race: White  
Characteristics to be Used in Match: [REDACTED]

Sort Results By: Provider Name (Ascending)



3. After viewing, click the **Close** button.

The **Potential Adoptive Families Search** screen appears.

# Navigating Matching Conference Functionality

## Viewing Existing Search Results

To obtain a reasonable number of potential adoptive homes and determine if they are appropriate adoptive placements (that the system will pull into the matching conference), complete the following steps:

1. On the **Potential Adoptive Families** screen, click the **View Results** link to view existing search result information.

The screenshot shows a web interface for 'Adoption Open (05/12/2021)'. It features a 'Linked Inquiries' tab and an 'Adoptive Families Search' tab. Under the 'Adoptive Families Search' tab, there is a 'Potential Adoptive Families' section with a 'Child Name' dropdown and a 'Search Families' button. Below this is a 'Potential Adoptive Families Match History' table with two rows of search results. The 'View Results' link in the second row is circled in red.

Potential Adoptive Families Match History			
<input type="checkbox"/>	Search Date	11/03/2022 04:07 PM	<a href="#">View Criteria</a> <a href="#">View Results</a>
<input type="checkbox"/>	Search Date	11/03/2022 04:04 PM	<a href="#">View Criteria</a> <a href="#">View Results</a>

The **Potential Matches** screen appears displaying the providers.

2. Click the **Edit** link in the appropriate row in order to document the outcome of the review (of each provider's information) to be presented at **Matching Conference** or the reason for non-consideration,

**Important:** You will complete these editing steps for each provider.

# Navigating Matching Conference Functionality

CASE NAME / ID:		Adoption / Open (05/12/2021)					
<b>Potential Matches</b>							
Child Name:		Search Date: 11/03/2022 04:04 PM					
Result(s) 1 to 12 of 12 / Page 1 of 1							
	Provider Name	Current Primary Address	Agency	Homestudy reviewed	Family will be presented	Reason family will not be presented	Reviewed Date
<a href="#">view</a> <a href="#">edit</a>			Ohio Department of Job and Family Services				
<a href="#">view</a> <a href="#">edit</a>			Ohio Department of Job and Family Services				
<i>Large Family Assessment(s) Completed</i>							
<a href="#">view</a> <a href="#">edit</a>			Ohio Department of Job and Family Services				
<a href="#">view</a> <a href="#">edit</a>			Ohio Department of Job and Family Services				
<a href="#">view</a> <a href="#">edit</a>			Ohio Department of Job and Family Services				
<a href="#">view</a> <a href="#">edit</a>			Ohio Department of Job and Family Services				
<i>Large Family Assessment(s) Completed</i>							
<a href="#">view</a> <a href="#">edit</a>			Ohio Department of Job and Family Services				

The **Pre-Matching Decision** screen appears.

# Navigating Matching Conference Functionality

3. In the **Homestudy reviewed; Family will be Presented** field, select **Yes** or **No**.

**Important:** When completing an (optional) potential adoptive family search **prior** to creating a new matching conference record, Ohio SACWIS automatically documents the search results in either the matching conference record or within certain sections of the **JFS 01689** report. In the **Homestudy Reviewed; Family will be Presented** field, for providers who have a:

- **Yes** value, Ohio SACWIS pulls those results into the **Families Considered** screen in the child’s matching conference record.
- **No** value (or a blank value), Ohio SACWIS pulls those results into the **JFS 01689** report in the **List all families identified as potential matches however they are not being presented** column.

4. If **Yes** is selected, enter a date in the **Reviewed Date** field.

**Note:** This is the date the decision was made.

5. If applicable, enter narrative in the **Additional Comments** field.

6. Click the **Save** button.

Pre-Matching Decision

Child Name: [redacted] Search Date: 11/03/2022 04:04 PM

Provider Name: [redacted] Provider ID: [redacted]

Worker Name: [redacted]

Large Family Assessment Information

No Approved Large Family Assessments Exist for this Provider

Homestudy reviewed: Yes

Family will be presented: Yes

Reviewed Date: [calendar icon]

Additional Comments:

Spell Check Clear 3000

Apply Save Cancel

The **Potential Matches** screen appears displaying that entry at the end of the grid.

# Navigating Matching Conference Functionality

7. If **No** is selected, select a reason in the **Reason family will not be Presented** field drop-down list. (See the screen shot)
8. Enter a date in the **Reviewed Date** field.  
**Note:** This is the date the decision was made.
9. If needed, click the **Exclude from Future Matches** check box.
10. If applicable, enter narrative in the **Additional Comments** field.
11. Click the **Save** button.

The screenshot shows the 'Pre-Matching Decision' form. It includes fields for 'Child Name', 'Search Date' (11/03/2022 04:04 PM), 'Provider Name', and 'Provider ID'. A section titled 'Large Family Assessment Information' contains a message: 'No Approved Large Family Assessments Exist for this Provider'. Below this, there are two main areas highlighted with red boxes. The left box contains: 'Homestudy reviewed:' with a 'Yes' dropdown, 'Family will be presented:' with a 'No' dropdown, 'Reviewed Date:' with a date picker, and an 'Additional Comments:' text area. The right box contains: 'Worker Name:' with a dropdown, 'Reason family will not be presented:' with a dropdown menu (currently showing 'Environmental health issue - Agency'), and a checked checkbox for 'Exclude from Future Matches'. At the bottom left, there are 'Spell Check', 'Clear', and '3000' buttons. At the bottom center, there are 'Apply', 'Save', and 'Cancel' buttons, with 'Save' circled in red.

The **Potential Matches** screen appears displaying the newest **Yes / No** entries at the bottom of the grid (shown in green).

12. After editing the detailed results for each provider, click the **Close** button.

# Navigating Matching Conference Functionality

CASE NAME / ID: [REDACTED] Adoption / Open (05/12/2021)

**Potential Matches**

Child Name: [REDACTED] Search Date: 11/03/2022 04:04 PM

Result(s) 1 to 12 of 12 / Page 1 of 1

	Provider Name	Current Primary Address	Agency	Homestudy reviewed	Family will be presented	Reason family will not be presented	Reviewed Date
<a href="#">view</a> <a href="#">edit</a>	[REDACTED]	[REDACTED]	Ohio Department of Job and Family Services	Yes	No	Environmental health issue - Agency	11/04/2022
<a href="#">view</a> <a href="#">edit</a>	[REDACTED]	[REDACTED]	Ohio Department of Job and Family Services				
Large Family Assessment(s) Completed							
<a href="#">view</a> <a href="#">edit</a>	[REDACTED]	[REDACTED]	Ohio Department of Job and Family Services				

The **Potential Adoptive Families Search** screen appears.

CASE NAME / ID: [REDACTED] Adoption Open (05/12/2021)

Linked Inquiries | **Adoptive Families Search**

**Potential Adoptive Families**

Child Name: [REDACTED] [Search Families](#)

**Potential Adoptive Families Match History**

- [REDACTED]
  - Search Date 11/03/2022 04:07 PM [View Criteria](#) [View Results](#)
  - Search Date 11/03/2022 04:04 PM [View Criteria](#) [View Results](#)

# Navigating Matching Conference Functionality

## Creating a New Matching Conference

Now that the potential matching search has been completed, you're ready to record the matching conference information. Even if you didn't do the potential adoptive families search as described previously, you can still record the matching conference information by completing the following steps:

1. Navigate to the child's **Case Overview** screen using the steps previously discussed.
2. Click the **Pre-Adoptive Staffing/Matching Conference** link in the **Navigation** menu. The **Placement Decision Process** screen appears.
3. Click the **Matching Conference** link.

The screenshot shows the Case Overview screen with the following elements:

- Navigation tabs: Home, Intake, Case (selected), Provider, Financial, Administration.
- Sub-navigation: Workload, Court Calendar, Placement Requests.
- Case Name / ID: Adoption Open (05/12/2021)
- Buttons: Pre-Adoptive Staffing, Matching Conference (circled in red).
- Note: Invitations must be sent at least 14 days prior to the Matching Conference scheduled date. Please create an In Progress Matching Conference record to generate a notification to the ODJFS MEPA Coordinator.
- Section: Matching Conference Records
- Text: Showing 6 Matching Conference records:
- Child Name: [Dropdown menu]
- Button: Add Matching Conference
- Table of Matching Conference Records:

	Matching Conference ID	Child(ren) Included	Date Matching Conference Occurred	Number of Families Presented	Worker Completing	Status
view	[Redacted]	[Redacted]	08/23/2022	1	[Redacted]	Complete 09/20/2022
view	[Redacted]	[Redacted]	06/08/2022	0	[Redacted]	Complete 07/14/2022

4. In the **Child Name** field, select the appropriate child's name from the drop-down list.

**Important:** If a sibling(s) needs to be included in the matching conference, refer to the check box step below to do so.

5. Click the **Add Matching Conference** button.

# Navigating Matching Conference Functionality

Matching Conference Records

Showing 6 Matching Conference records:

Child Name:

**Add Matching Conference**

	Matching Conference ID	Child(ren) Included	Date Matching Conference Occurred	Number of Families Presented	Worker Completing	Status	
view			08/23/2022	1		Complete 09/20/2022	
view			06/08/2022	0		Complete 07/14/2022	

The **Manage Matching Conference** screen appears.

6. In the **Date Scheduled** field, enter the appropriate date.
7. Click the **Save** button.

## Manage Matching Conference

CASE NAME / ID:  Adoption / Open (05/12/2021)

Matching Conference Planning Families Considered Matching Chart Placement Decision

Date Scheduled: \*

Date Occurred:

Child(ren) To Be Matched

Matching Conference Participants

	Name / ID	Role	Agency/Organization	Participated	
edit	<input type="text"/>	Child		<input type="checkbox"/>	
edit	<input type="text"/>	Adoption Caseworker		<input type="checkbox"/>	
edit	<input type="text"/>	IL Worker		<input type="checkbox"/>	
edit	<input type="text"/>	Adoption Caseworker	County Children Services Board	<input type="checkbox"/>	
edit	<input type="text"/>	Adoption Supervisor	County Children Services Board	<input type="checkbox"/>	
edit	<input type="text"/>	Adoption Caseworker	County Children Services Board	<input type="checkbox"/>	
edit	<input type="text"/>	IL Worker		<input type="checkbox"/>	
edit	<input type="text"/>	Adoption Supervisor	County Children Services Board	<input type="checkbox"/>	
edit	<input type="text"/>	IL Worker		<input type="checkbox"/>	

**Add Participant** Generate Signature Page

Status: \* In Progress **Save** Cancel

# Navigating Matching Conference Functionality

## Completing the Match Conference Planning Tab

1. In the **Date Occurred** field, enter the appropriate date.  
**Important:** This field must contain a date for the matching conference record to display on the JFS 01610 Report.
2. If a sibling(s) needs to be included, click the appropriate check box.
3. Click the **Add Participant** button.

**Note:** As long as the record has **In Progress** status, you can add or delete participants at any time.

Manage Matching Conference

CASE NAME / ID: [REDACTED] Adoption / Open (05/12/2021)

Matching Conference Planning Families Considered Matching Chart Placement Decision

Date Scheduled: \* 11/03/2022 [Calendar Icon] Date Occurred: 11/04/2022 [Calendar Icon]

Child(ren) To Be Matched

[REDACTED]  
Sibling(s) would show here

Matching Conference Participants

	Name / ID	Role	Agency/Organization	Participated	
<a href="#">edit</a>	[REDACTED]	Child		<input type="checkbox"/>	

**Add Participant** Generate Signature Page

The **Search for Person** screen appears.

# Navigating Matching Conference Functionality

4. Search people by last and first name, Person ID, or SSN on who should participate in the Match Conference Planning. You can also create a new person if they don't already exist in Ohio SACWIS. Click **Select**.

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:  First Name:  Middle Name:  Gender:

DOB:   ~ OR ~ Age Range:  -   
From Age To Age

---

[Reference, TCN, and Address Criteria](#) v

---

Name Match Precision Sort by:   
Returns results matching entered names including AKA names/nicknames

+ AKA/Nicknames

Fewer Results More Results

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
<b>select</b>	<input type="text"/>	County Children Services, <input type="text"/>	Female		

[Related Persons](#) v

The Participant Information screen appears.

5. In the **Role** field, choose the appropriate role from the drop-down list.
6. If applicable, add the appropriate name in the **Agency / Organization** field.
7. Click the **Save** button.

# Navigating Matching Conference Functionality

Case / Workload / Placement Decision / Pre-Adoptive Staffing

## Participant Information

CASE NAME / ID: [redacted] Adoption / Open (05/12/2021)

**Matching Conference Participant Information**

Person Name: [redacted]

Agency/Organization: [redacted] Ohio County Children Services

Role: \*

- Adoption Caseworker
- Adoption Supervisor
- Adoptive Home Assessor
- CASA
- Case Manager
- Child
- Consultant
- Counselor/Therapist
- Director
- Facilitator
- Foster Care Worker
- Foster Parent
- GAL
- IL Worker
- Manager
- Kinship Caregiver
- Maternal Relative
- Medical Professional
- MEPA Coordinator

The **Match Conference Participants** screen appears displaying the participant information in the grid as shown in green below.

- Repeat the previous steps to add additional participants.
- Prior to marking the matching conference as **Completed**, click the **Participated** check box for any participant who attended.

## Manage Matching Conference

CASE NAME / ID: [redacted] Adoption / Open (05/12/2021)

✔ Your data has been saved.

Matching Conference Planning Families Considered Matching Chart Placement Decision

Date Scheduled: \* 11/03/2022  Date Occurred: 11/04/2022

ODJFS MEPA Coordinator has been notified on: 11/04/2022

Child(ren) To Be Matched

[redacted]

**Matching Conference Participants**

	Name / ID	Role	Agency/Organization	Participated	
<input type="button" value="edit"/>	[redacted]	Adoption Caseworker	Ohio County Children Services	<input type="checkbox"/>	<input type="button" value="trash"/>

Status: \* In Progress

# Navigating Matching Conference Functionality

Next click on the **Families Considered** tab.

CASE NAME / ID: [redacted] Adoption / Open (05/12/2021)

Your data has been saved.

Matching Conference Planning **Families Considered** Matching Chart Placement Decision

**Families Considered**

Child(ren) to be Matched:  
[redacted]

Show only families to be presented

## Completing the Families Considered Tab

1. After completing the **Match Conference Planning** tab, click the **Families Considered** tab.
2. To add a family, click the **Add Family** button.

**Note:** If a match was not previously completed, the screen will appear with no entries. However, any potential families identified from a search will automatically populate in this grid and you can add additional families by following the steps in this sub-section.

CASE NAME / ID: [redacted] Adoption / Open (05/12/2021)

Your data has been saved.

Matching Conference Planning **Families Considered** Matching Chart Placement Decision

**Families Considered**

Child(ren) to be Matched:  
[redacted]

Show only families to be presented

	Provider Name / ID	Homestudy Reviewed	Family will be presented	Reason Family was not Presented	Comments	Conference Decision
<a href="#">edit</a>	[redacted]	Yes	Yes			

**Add Family**

Inquiry Name / ID	Application Reviewed	Family will be presented	Reason Family was not Presented	Comments	Conference Decision
Inquiry Status					

# Navigating Matching Conference Functionality

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

3. Enter search criteria into the fields.
4. Click the **Search** button. The results appear in the grid.
5. Click the **Select** link in the appropriate grid row.

**Search For Provider Profile**

Provider ID:

OR

Provider Name:  Member Last Name:  Member First Name:  Member Middle Name:

Provider Category:

Agency Type:

Agency:

Provider Type:   Include "Closed" Provider Type Status

Provider Status:

---

[Address, Contact and Provider Reference Criteria](#)

---

Name Match Precision  
*Returns results matching entered names including AKA names/nicknames*

Fewer Results More Results

# Navigating Matching Conference Functionality

**Search For Provider Profile**

Provider ID:

OR

Provider Name:

Member Last Name:  Member First Name:  Member Middle Name:

Provider Category:

Agency Type:

Agency:

Provider Type:   Include "Closed" Provider Type Status

Provider Status:

[Address, Contact and Provider Reference Criteria](#)

Name Match Precision  
Returns results matching entered names including AKA names/nicknames

[Fewer Results](#) [More Results](#)

**Search Results**

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

	Provider Name / ID	Provider Status	Provider Category	Address
<a href="#">select</a>		ACTIVE	HOME	

[View Provider Type Information](#)

The **Family / Provider Details** screen appears displaying the selected provider's information as shown in green.

6. Complete the remaining fields as needed.

**Important:** At a later time, you will return to this screen and fill out additional fields, such as the **Conference Decision** field and **Reason for Decision** field.

7. When complete, click the **Save** button.

# Navigating Matching Conference Functionality

**Family/Provider Details**

Provider Name/ID: \_\_\_\_\_ Provider Address: \_\_\_\_\_ Agency: County Children Services Board

**Large Family Assessment Information**

None Selected  
 N/A - Large Family Assessment not required.  
 A Large Family Assessment is applicable to this placement.  
 The following Large Family Assessment(s) are not applicable to this placement.

Status	Recommendation	Approval Date	Agency
Agency:	Recommendation:		
Approval Date:			

Summary of the selected Large Family Assessment: [\(expand full screen\)](#)

Homestudy reviewed: \* Yes Reviewed Date: 11/04/2022

Family will be presented: Yes

Comments: [\(expand full screen\)](#)

**Save** Cancel

The **Families Considered** screen appears displaying the information in the grid:

# Navigating Matching Conference Functionality

8. Repeat the steps above to add providers.
9. When complete, click the **Save** button.

Matching Conference Planning   Families Considered   Matching Chart   Placement Decision

**Families Considered**

Child(ren) to be Matched:

Show only families to be presented

	Provider Name / ID	Homestudy Reviewed	Family will be presented	Reason Family was not Presented	Comments	Conference Decision
<a href="#">edit</a>	<input type="text"/>	Yes	Yes			
<a href="#">edit</a>	<input type="text"/>	Yes	Yes			

[Add Family](#)

Inquiry Name / ID	Application Reviewed	Family will be presented	Reason Family was not Presented	Comments	Conference Decision
Inquiry Status					

Status: \* In Progress [Apply](#) [Save](#) [Cancel](#)

## Information about the Families Considered Tab:

- Any potential adoptive placements that were identified from a potential adoptive family search will appear as a number in the grid as shown below.
- You can delete the entire matching conference record with a status of **In Progress** by clicking the **Delete** link on the right.
- You can only have one **In Progress** matching conference for each child. For example, Susie and Tommy can have an **In Progress** matching conference and their sibling Sammy can have his own matching conference. However, Tommy cannot have his own if he has been included in Susie’s matching conference.
- Only the families who show a value of **Yes** in the **Home Study Reviewed**; **Family will be Presented** field and have not been marked as **Withdrawn** in the **Conference Decision** column will appear in the grid.
- As shown in red, the number is a total compilation from the **Families Considered** screen and the **Potential Families Search Results** screen that has a **Yes** value.
- If a record cannot be edited, a **View** link appears in the grid.

# Navigating Matching Conference Functionality

CASE NAME / ID: Adoption  
Open (05/12/2021)

Pre-Adoptive Staffing | Matching Conference

**Note:** Invitations must be sent at least 14 days prior to the Matching Conference scheduled date. Please create an In Progress Matching Conference record to generate a notification to the ODJFS MEPA Coordinator.

**Matching Conference Records**

Showing 7 Matching Conference records:

Child Name:  Add Matching Conference

	Matching Conference ID	Child(ren) Included	Date Matching Conference Occurred	Number of Families Presented	Worker Completing	Status	
<a href="#">edit</a>			11/04/2022	2		In Progress	<a href="#">trash</a>

## Completing the Matching Chart Topics

At this point in the process, the families that will be presented at the matching conference have been identified (listed on the **Families Considered** tab). Now you are ready to complete the JFS 01689 (Documentation of the Placement Decision-Making Process). In Ohio SACWIS, this is called the **Matching Chart** link.

**Important:** By completing the matching chart, you are documenting the response that most accurately describes the family’s ability to meet the child’s needs.

To document the responses of each family being presented, complete the following steps:

1. Navigate to the **Manage Matching Conference** screen using the steps previously discussed.
2. Click the **Matching Chart** link in the appropriate grid row.

**Note:** All families identified for presentation will appear on the JFS 01689, except families marked as **Withdrawn** do not display.

Case Overview | **Activity Log** | Attorney Communication | Intake List | Forms/Notices | Substance Abuse Screening | Ongoing Case All | Specialized All Tool | Law Enforcement | Justification/Waiver | Case Services | Legal Actions | Legal Custody/Status | Living Arrangement / Guardianship | Initial Removal | Potential Adoptive Families | Child Recruitment | **Pre-Adoptive Staffing/Matching Conference**

CASE NAME / ID: Adoption  
Open (05/12/2021)

Pre-Adoptive Staffing | Matching Conference

**Note:** Invitations must be sent at least 14 days prior to the Matching Conference scheduled date. Please create an In Progress Matching Conference record to generate a notification to the ODJFS MEPA Coordinator.

**Matching Conference Records**

Showing 7 Matching Conference records:

Child Name:  Add Matching Conference

	Matching Conference ID	Child(ren) Included	Date Matching Conference Occurred	Number of Families Presented	Worker Completing	Status	
<a href="#">edit</a>			11/04/2022	2		In Progress	<a href="#">trash</a>
<a href="#">view</a>			08/23/2022	1		Complete 09/20/2022	<a href="#">trash</a>

# Navigating Matching Conference Functionality

## Manage Matching Conference

CASE NAME / ID: [REDACTED] Adoption / Open (05/12/2021)

Matching Conference Planning Families Considered **Matching Chart** Placement Decision

Date Scheduled: \* 11/03/2022  Date Occurred: 11/04/2022 

ODJFS MEPA Coordinator has been notified on: 11/04/2022

**Child(ren) To Be Matched**

[REDACTED]

**Matching Conference Participants**

	Name / ID	Role	Agency/Organization	Participated	
<a href="#">edit</a>	[REDACTED]	Adoption Caseworker	Ohio County Children Services	<input type="checkbox"/>	

The **Matching Chart** screen appears.

3. For each topic, click the topic link.
4. Complete all the question fields for each topic on the screen.

**Note:** As an example, the **Basic Daily Needs** link is discussed in more detail in the next sub-section.

5. Click **Save** at any time to retain the progress. When all factors are done, choose **Complete** from the **Status** drop down.

Manage Matching Conference

CASE NAME / ID: [REDACTED] Adoption / Open (04/04/2023)

Matching Conference Planning Families Considered **Matching Chart** Placement Decision

**Matching Chart**

Child(ren) to be Matched:

[REDACTED]

*For families presented in the matching conference, consider the specified factors reflected in the top row of each section. List the names of families presented in the first column on the left. For each column identify the response that most accurately describes the family's ability to meet the child's need. The impact on the child can be positive (+), neutral (0), or negative (-). Some factors may not apply because they are not a need of the child (ren) being presented. In those cases, check the "N/A" box. Use the following guidelines to rate the family's ability to meet a specific characteristic.*

[Details about matching factors](#) v

**Factors**

Factor	Topics	Status
<a href="#">Basic Daily Needs</a>	<ul style="list-style-type: none"><li>Meets child's health needs</li><li>Meets child's physical needs (food, clothing, shelter)</li><li>Home environment is free of child specific health and safety hazards</li><li>Supervision to meet child's developmental or behavioral needs</li></ul>	Complete
<a href="#">Treatment Needs</a>	<ul style="list-style-type: none"><li>Child needs mental health therapy and the family is able to participate in the treatment plan</li><li>Understands the importance of and is able to follow through with medication management as prescribed</li><li>Willing to advocate for child's special education needs</li><li>Understands the limited life expectancy of the child</li><li>Able to cope with and meet the demands of frequent clinic visits/hospitalizations</li></ul>	Complete

Status: \* In Progress v [Apply](#) [Save](#) [Cancel](#)

The **Matching Conference Records** screen appears.

# Navigating Matching Conference Functionality

## Completing the Basic Daily Needs Topic

This shows an example of how to complete a topic link:

Manage Matching Conference

CASE NAME / ID: [REDACTED] Adoption / Open (04/06/2020)

Matching Conference Planning Families Considered **Matching Chart** Placement Decision

### Matching Chart

Child(ren) to be Matched:  
[REDACTED]

*For families presented in the matching conference, consider the specified factors reflected in the top row of each section. List the names of families presented in the first column on the left. For each column identify the response that most accurately describes the family's ability to meet the child's need. The impact on the child can be positive (+), neutral (0), or negative (-). Some factors may not apply because they are not a need of the child (ren) being presented. In those cases, check the "N/A" box. Use the following guidelines to rate the family's ability to meet a specific characteristic.*

[Details about matching factors](#) ▾

### Factors

Factor	Topics	Status
<b>Basic Daily Needs</b>	<ul style="list-style-type: none"><li>Meets child's health needs</li><li>Meets child's physical needs (food, clothing, shelter)</li><li>Home environment is free of child specific health and safety hazards</li><li>Supervision to meet child's developmental or behavioral needs</li></ul>	Complete

1. Click the **Basic Daily Needs** link.

The **Basic Daily Needs** screen appears.

2. Complete each drop-down list field and add comments as needed.
3. When completed, click the **Save** button.

Example of multiple families:

# Navigating Matching Conference Functionality

## Maintain Factors

CASE NAME / ID: [REDACTED] Adoption / Open (05/12/2021)

### Basic Daily Needs

*This section addresses each family's ability to provide basic needs, including but not limited to medical, food, clothing, and environmental needs that will be beneficial in the care of the child(ren).*

#### Meets child's health needs

[REDACTED] [REDACTED]

+ 0 -      + 0 -

Topic Comments ^

Comments: [\(expand full screen\)](#)

Comments

✓ ABC

3993

#### Meets child's physical needs (food, clothing, shelter)

[REDACTED] [REDACTED]

+ 0 -      + 0 -

Topic Comments ^

Comments: [\(expand full screen\)](#)

✓ ABC

4000

#### Home environment is free of child specific health and safety hazards

[REDACTED] [REDACTED]

+ 0 -      + 0 -

Topic Comments v

#### Supervision to meet child's developmental or behavioral needs

[REDACTED] [REDACTED]

+ 0 -      + 0 -

Topic Comments v

Previous Next Apply **Save** Cancel

The **Matching Chart** screen appears displaying a message that your data has been saved.

4. Click the **Save** button.

# Navigating Matching Conference Functionality

## Documenting Your Choices for Possible Adoptive Placements

1. On the **Matching Conference Records** screen, click the **Edit** link in the appropriate grid row.

Case Overview  
Activity Log  
Attorney Communication  
Intake List  
Forms/Notices  
Substance Abuse Screening  
Ongoing Case A/E  
Specialized A/E Tool  
Law Enforcement  
Justification/Waiver  
Case Services  
Legal Actions  
Legal Custody/Status  
Living Arrangement / Guardianship  
Initial Removal  
Potential Adoptive Families  
Child Recruitment  
Pre-Adoptive Staffing/Matching Conference

CASE NAME / ID: [redacted] Adoption  
Open (05/12/2021)

Pre-Adoptive Staffing Matching Conference

Note: Invitations must be sent at least 14 days prior to the Matching Conference scheduled date. Please create an In Progress Matching Conference record to generate a notification to the ODJFS MEPA Coordinator.

Matching Conference Records

Showing 7 Matching Conference records:

Child Name: [redacted] Add Matching Conference

Matching Conference ID	Child(ren) Included	Date Matching Conference Occurred	Number of Families Presented	Worker Completing	Status
[redacted] edit	[redacted]	11/04/2022	2	[redacted]	In Progress
[redacted] view	[redacted]	08/23/2022	1	[redacted]	Complete 09/20/2022

The **Match Conference Planning Information** screen appears.

2. Click the **Placement Decision** tab.
3. Click the **Edit** link next to the family name(s).

**Important:** You will click the **Edit** link for each family who appear in the grid.

Manage Matching Conference

CASE NAME / ID: [redacted] Adoption / Open (05/12/2021)

Matching Conference Planning Families Considered Matching Chart Placement Decision

Matching Chart

Child(ren) to be Matched:  
[redacted]

Families Selected

	Family Name	Conference Decision	Current Family Response	Date of Response
edit	[redacted]			
edit	[redacted]			

# Navigating Matching Conference Functionality

The **Conference Decision and Family Response Details** screen appears.

4. In the **Conference Decision** field, select the appropriate value (**First** through **Fourth Choice**, **Withdrawn**, or **No**).
5. If **No** is selected for the conference decision, explain the reasoning in the **Explain Reason for this Conference Decision** field.
6. In the **Initial Family Response Details**, enter the appropriate dates and responses.
7. When complete, click the **Save** button.

## Important:

- When entering decisions, the families do not have to be entered in any particular order.
- Upon save, the system will verify that you did not omit any values. For example, if you selected a second choice, you must also select a first choice.

# Navigating Matching Conference Functionality

## Conference Decision And Family Response Details

CASE NAME / ID: [REDACTED] Adoption / Open (05/12/2021)

**Family Conference Decision**

Family Name/ID: [REDACTED] Family Address: [REDACTED] Agency: County Children Services Board

Conference Decision: \*  
First Choice [v]  
First Choice  
Second Choice  
Third Choice  
Fourth Choice  
No  
Withdrawn

[REDACTED] [ABC] [4000]

**Initial Family Response Details**

Date of Presentation to the Family: [REDACTED] Family Response Deadline Date: [REDACTED]  
Family Response: [REDACTED] Date of Response: [REDACTED]

**Subsequent Family Response Details (if family later changed their decision)**

Subsequent Family Response: [REDACTED] Date of Subsequent Family Response: [REDACTED]  
Subsequent Family Response Comments: (expand full screen) [REDACTED] [ABC] [2000]

Apply Save Cancel

The **Manage Matching Conference** screen appears.

# Navigating Matching Conference Functionality

## Marking a Matching Conference Record as Completed

1. Navigate to the **Matching Conference Records** screen using the steps previously discussed.
2. Click the **Edit** link in the appropriate (non-completed) row.

Case Overview  
Activity Log  
Attorney Communication  
Intake List  
Forms/Notices  
Substance Abuse Screening  
Ongoing Case Act  
Specialized All Tool  
Law Enforcement  
Justification/Waiver  
Case Services  
Legal Actions  
Legal Custody/Status  
Living Arrangement / Guardianship  
Initial Removal  
Potential Adoptive Families  
Child Placement  
Pre-Adoptive Staffing/Matching Conference  
Placements

CASE NAME / ID: Adoption Open (05/12/2021)

Pre-Adoptive Staffing Matching Conference

Note: Invitations must be sent at least 14 days prior to the Matching Conference scheduled date. Please create an In Progress Matching Conference record to generate a notification to the ODJFS MEPA Coordinator.

Matching Conference Records

Showing 7 Matching Conference records:

Child Name:  Add Matching Conference

Matching Conference ID	Child(ren) Included	Date Matching Conference Occurred	Number of Families Presented	Worker Completing	Status
<a href="#">edit</a>		11/04/2022	2		In Progress
<a href="#">view</a>		08/23/2022	1		Complete 09/20/2022

The **Manage Matching Conference** screen appears.

### Important:

- After selecting **Completed** in the Status field on the **Manage Matching Conference** screen, Ohio SACWIS locks the matching conference record as well as the JFS 01689 matching chart within the matching conference record. **Do not mark the Matching Conference as Completed until you have completed the JFS 01689 Matching Chart** (links).
- While the matching conference record has an **In Progress** status, the JFS 01689 report will display with a **Draft** watermark. Once the record has been locked, the **Draft** watermark will no longer display and/or print on the newly generated JFS 01689 report.

# Navigating Matching Conference Functionality

- To mark the record as **Completed**, select **Complete** on the **Status** on the **Manage Matching Conference** at the bottom of the screen.
- Click the **Save** button.

## Manage Matching Conference

CASE NAME / ID: [redacted] Adoption / Open (05/12/2021)

Matching Conference Planning Families Considered Matching Chart Placement Decision

Date Scheduled: \* 11/03/2022 Date Occurred: 11/04/2022

ODJFS MEPA Coordinator has been notified on: 11/04/2022

Child(ren) To Be Matched

Matching Conference Participants

Name / ID	Role	Agency/Organization	Participated
[redacted]	Adoption Caseworker	Ohio County Children Services	<input checked="" type="checkbox"/>

Generate Signature Page

Status: \* In Progress  
Complete Apply Save Cancel

The record appears in the grid displaying a **Completed** status.

Case Overview  
 Activity Log  
 Attorney Communication  
 Intake List  
 Forms/Notices  
 Substance Abuse Screening  
 Ongoing Case All  
 Specialized All Tool  
 Law Enforcement  
 Justification/Waiver  
 Case Services  
 Legal Actions  
 Legal Custody/Status  
 Living Arrangement / Guardianship  
 Initial Removal  
 Potential Adoptive Families  
 Child Recruitment  
 Pre-Adoptive Staffing/Matching Conference  
 Placement/ICCA

CASE NAME / ID: [redacted] Adoption Open (05/12/2021)

Pre-Adoptive Staffing Matching Conference

Note: Invitations must be sent at least 14 days prior to the Matching Conference scheduled date. Please create an In Progress Matching Conference record to generate a notification to the ODJFS MEPA Coordinator.

Matching Conference Records

Showing 7 Matching Conference records:

Child Name: [redacted] Add Matching Conference

Matching Conference ID	Child(ren) Included	Date Matching Conference Occurred	Number of Families Presented	Worker Complete	Status
<a href="#">view</a> [redacted]	[redacted]	11/04/2022	2	[redacted]	Complete 11/07/2022
<a href="#">view</a> [redacted]	[redacted]	08/23/2022	1	[redacted]	Complete 09/20/2022

# Navigating Matching Conference Functionality

## Recording the Initial Family Response Link

Once a matching conference record has been marked as **Completed**, the only fields that can be edited are the **Family Response** links as shown in this sub-section.

1. Navigate to the **Placement Decision** screen (**Matching Conference Planning** link) using the previous steps.
2. Click the **Placement Decision** tab.
3. The **Placement Decision** screen appears, click **Edit**.

Case Overview  
Activity Log  
Attorney Communication  
Intake List  
Forms/Notices  
Substance Abuse Screening  
Ongoing Case All  
Specialized All Tool  
Law Enforcement  
Justification/Waiver  
Case Services  
Legal Actions  
Legal Custody/Status  
Living Arrangement / Guardianship  
Initial Removal  
Potential Adoptive Families  
Child Placement  
**Pre-Adoptive Staffing/Matching Conference**

CASE NAME / ID: [redacted] Adoption Open (05/12/2021)

Pre-Adoptive Staffing Matching Conference

Note: Invitations must be sent at least 14 days prior to the Matching Conference scheduled date. Please create an In Progress Matching Conference record to generate a notification to the ODJFS MEPA Coordinator.

Matching Conference Records

Showing 7 Matching Conference records:

Child Name: [redacted] Add Matching Conference

	Matching Conference ID	Child(ren) Included	Date Matching Conference Occurred	Number of Families Presented	Worker Completing	Status	
<a href="#">view</a>	37166473	[redacted]	11/04/2022	2	[redacted]	Complete 11/07/2022	[redacted]
<a href="#">view</a>	37158575	[redacted]	08/23/2022	1	[redacted]	Complete 09/20/2022	[redacted]

### Manage Matching Conference

CASE NAME / ID: [redacted] Adoption / Open (05/12/2021)

Matching Conference Planning Families Considered Matching Chart **Placement Decision**

Matching Chart

Child(ren) to be Matched: [redacted]

Families Selected

	Family Name	Conference Decision	Current Family Response	Date of Response
<a href="#">edit</a>	[redacted]	First Choice	Yes	11/07/2022
<a href="#">edit</a>	[redacted]	Second Choice	No	11/07/2022

4. Click the **Family Response** link in the appropriate row.

# Navigating Matching Conference Functionality

## Important:

- For each family / provider who has a **Conference Decision** of **First Choice, Second Choice, Third Choice** and/or **Fourth Choice**, the **Initial Family Response Details** screen must be completed if the family later changes their decisions. Any narrative field prints out on the JFS 01610 report.

## Recording a Subsequent Family Response Link

- If the family has had a life situation or they simply just change their mind and they need to change the status of their decision, complete the following steps to document that change:
- **Important:** These steps would only be applicable if the initial family response has already been recorded in Ohio SACWIS.

The **Initial Family Response Details** screen appears.

5. Complete the fields as needed.

## Reminder:

- This screen can be edited even after the matching conference record has been marked as **Completed**.
- Only the information recorded in the **Initial Family Response Details** section and the **Subsequent Family Response Details** section will be printed on the JFS 01610 report. If no information has been recorded, then the Family Response section of the JFS 01610 will remain blank.

6. Click the **Save** button at the bottom of the screen.

# Navigating Matching Conference Functionality

## Conference Decision And Family Response Details

CASE NAME / ID: [redacted] Adoption / Open (05/12/2021)

**Family Conference Decision**

Family Name/ID: [redacted] Family Address: [redacted] Agency: [redacted] County Children Services Board

Conference Decision: \*  
First Choice

Explain reason for this conference decision: \*   
[\(expand full screen\)](#)  
Aligned most to the child.

**Initial Family Response Details**

Date of Presentation to the Family: 11/07/2022  Family Response Deadline Date: [redacted] 

Family Response: Yes  Date of Response: 11/07/2022 

**Subsequent Family Response Details (if family later changed their decision)**

Subsequent Family Response: [redacted] Date of Subsequent Family Response: [redacted] 

Subsequent Family Response Comments:  
[\(expand full screen\)](#)

Apply Save Cancel

The **Manage Matching Conference** screen appears.

# Navigating Matching Conference Functionality

## Printing a JFS 01689 Report

The JFS 01689 is titled the **Documentation of the Placement Decision-Making Process**. To generate the report, complete the following steps:

### Important:

- Until the matching conference record has been marked as **Completed**, the JFS 01689 report will display a **Draft** watermark.
- Each of the providers / families who displays a **Yes** in the **Home Study Reviewed; Family will be Presented** field and have not been marked as **Withdrawn** in the **Conference Decision** column will display on the **JFS 01689** report for placement consideration completion.

1. Navigate to the **Matching Conference Records** screen (**Matching Conference** link) using the steps previously discussed.
2. Click the **Report** icon on the appropriate grid row at the end.

Case Overview  
Activity Log  
Attorney Communication  
Intake List  
Forms/Notices  
Substance Abuse Screening  
Ongoing Case All  
Specialized All Tool  
Law Enforcement  
Justification/Waiver  
Case Services  
Legal Actions  
Legal Custody/Status  
Living Arrangement / Guardianship  
Initial Removal  
Potential Adoptive Families  
Child Placement  
**Pre-Adoptive Staffing/Matching Conference**  
Placement/ICCA

CASE NAME / ID: Adoption  
Open (05/12/2021)

Pre-Adoptive Staffing Matching Conference

Note: Invitations must be sent at least 14 days prior to the Matching Conference scheduled date. Please create an In Progress Matching Conference record to generate a notification to the ODJFS MEPA Coordinator.

Matching Conference Records

Showing 7 Matching Conference records:

Child Name:  Add Matching Conference

	Matching Conference ID	Child(ren) Included	Date Matching Conference Occurred	Number of Families Presented	Worker Completing	Status	
view	37166473		11/04/2022	2		Complete 11/07/2022	
view	37166575		08/23/2022	1		Complete 08/20/2022	

The **Document Details** screen appears.

3. If the narrative field is enabled, enter the appropriate content.

**Important:** Based on whether or not there are families / providers identified and considered for adoptive placement, the JFS 01689 report parameters screen may require an explanation narrative prior to generating the report.

# Navigating Matching Conference Functionality

Example of the field being disabled:

Placement Decision Making Process Documentation-Placement Decision Making Process Documentation

If no families were identified and considered as an adoptive placement for this child at the matching conference. Explain why:

Is there a current JFS 01688 for any of the children being considered for matching that states that race, color, or national origin should be a consideration in the placement decision? \*

Yes  No

**Generate Report** Cancel

4. Click the **Generate Report** button.

The report appears as shown in this example and can be saved:

Ohio Department of Job and Family Services

**DOCUMENTATION OF THE PLACEMENT DECISION-MAKING PROCESS**

The JFS 01689 is to be completed at each Matching Conference. One JFS 01689 is to be completed for each child or sibling group who is being considered to be matched for placement in the same adoptive family. Attach additional sheets and/or documents if necessary.

Name(s) of child(ren) to be considered for matching: [REDACTED]	Date of matching conference: 11/04/2022
--	--

If the children being considered together for matching are different than the pre-adoptive staffing or the previous matching conference, whichever was more recent, please explain the reason for the change:  
Test

Is there a current JFS 01688 for any of the children being considered for matching that states that race, color, or national origin should be a consideration in the placement decision? **No** If yes, date of the current JFS 01688?

List all families who were identified as a potential match with the child through the automated match system or who expressed an interest in being considered for the child, but are not being presented at the matching conference.

Family Name	Reason Family is not Being Presented at Matching Conference	Family Serving Agency

Were families identified and considered as an adoptive placement for this child at the matching conference? **Yes**  
If no, please detail the recruitment efforts completed in the last ninety days.

Were there factors, such as a family's personal circumstances, that resulted in any family being postponed or withdrawn from consideration? **No**  
If yes, please complete the table below.

# Navigating Matching Conference Functionality

## Printing a JFS 01610 Report

The JFS 01610 report is titled the **Child's Permanency Planning Data Summary**. The report displays a row for every matching conference that has occurred, including conferences where no families were presented.

For every completed matching conference record, a JFS 01610 must be generated and saved in Ohio SACWIS to ensure MEPA review compliance.

There are two options for generating the report. You can select:

- A time frame from when the child's matching conference information will be pulled, or
- All matching conference records that have been completed for the child.

As long as all of the child's matching conferences are documented in Ohio SACWIS in a saved JFS 01610 pdf file, both options are available.

As previously mentioned, each of the providers / families who displays a **Yes** in the **Home Study Reviewed; Family will be Presented** field and have not been marked as **Withdrawn** in the **Conference Decision** column will display on the JFS 01610 report as families considered for a match of the child in focus.

When generating the JFS 01610 report, if data appears to be missing or incorrect, cancel the save and navigate to the appropriate Ohio SACWIS screen to correct the information. Once the data has been saved, navigate back to the JFS 01610 report, re-generate the report and save it in the system.

**Important:** A JFS 01610 report does not need to be printed and placed in the child's file. All saved reports within Ohio SACWIS are considered to be a "snapshot" of the child's information that can be viewed (or printed) at any time by selecting the saved report's pdf file. Reports for closed cases can also be viewed and printed.

# Navigating Matching Conference Functionality

1. Navigate to the child's **Case Overview** screen using the previous steps.
2. Click the **Forms/Notices** link in the **Navigation** menu. The **Maintain Forms/Notices** screen appears.
3. In the **Forms/Notices** field, select **JFS 01610 – Child's Permanency Planning Data Summary** from the drop-down list.
4. Click the **Select** button.

The screenshot shows a web application interface with a top navigation bar containing tabs for Home, Intake, Case (selected), Provider, Financial, and Administration. Below this is a secondary bar with Workload, Court Calendar, and Placement Requests. A left-hand navigation menu lists various case management options, with 'Forms/Notices' circled in red. The main content area displays 'Adoption Open (05/12/2021)' and a 'Maintain Forms/Notices' section. A dropdown menu is open, showing a list of forms and notices. The option 'JFS 01610 - Child's Permanency Planning Data Summary' is highlighted with a red box. A 'Select' button is also highlighted with a red box.

The **Document Details** screen appears.

5. Click the **Generate Report** button.

# Navigating Matching Conference Functionality

**Document Details**

Document Category: [redacted] Document Title: JFS 01610 - Child's Permanency Planning Data Summary

Work-Item ID: [redacted] Work-Item Reference: [redacted]

Task ID: 10 Task Reference: [redacted]

**Document History**

ID	Date Created	Employee ID	Name
<a href="#">32756778</a>	06/29/2021 11:01 PM	[redacted]	[redacted]
<a href="#">33411201</a>	12/08/2021 01:45 PM	[redacted]	[redacted]
<a href="#">33447845</a>	12/16/2021 01:31 PM	[redacted]	[redacted]
<a href="#">33852185</a>	03/30/2022 11:52 AM	[redacted]	[redacted]
<a href="#">34260347</a>	07/14/2022 08:56 AM	[redacted]	[redacted]
<a href="#">34526433</a>	09/20/2022 03:25 PM	[redacted]	[redacted]

**Document History**

**Generate Report**

The **JFS 01610 – Child Permanency Planning Data** screen appears.

6. Enter data into the fields.

**Note:** Entering dates is optional and it's recommended to not enter dates, but rather click the Print All Matching Conferences for Child field check box.

7. Click the **Generate Report** button.

**JFS 01610 - Child Permanency Planning Data**

Caseworker: [dropdown]

Child Name: \* [dropdown]

Court Case Number: [dropdown]

Court ID Number: [dropdown]

From Date: 08/01/2022

To Date: 11/07/2022

Print All Matching Conferences for Child

**Generate Report** **Cancel**

The following screen appears showing the report is being created:

# Navigating Matching Conference Functionality

Your report is being created



Please wait ...

Report Requested: 05:37:13 PM  
Last Checked: 05:37:13 PM

[Cancel](#)

The report appears.

8. To save the report, click the **Save** button.

1 of 1
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— + ... ⚙️

Ohio Department of Job and Family Services  
Child's Permanency Planning Data Summary

Child's name	Date of birth	Race	Juvenile Court case number
[REDACTED]	[REDACTED]	White	[REDACTED]
PC filing date	PC/PS court hearing date	Legally available date	Assessor assigned and date
02/01/2021		04/06/2021	
Date of child's last foster care placement	Adoptive placement date	Adoption finalization date	
06/01/2022			

Date child presented/ matching conference	Families considered	Outcomes	Date of presentation to family	Family response deadline date	Date and family response
11/04/2022	[REDACTED]	Test	11/07/2022		11/07/2022 YES
11/04/2022	[REDACTED]	Test	11/07/2022		11/07/2022 NO
08/23/2022	[REDACTED]	[REDACTED] is doing well in her placement. She has recently started school and is acclimating to her new surroundings.	08/23/2022	08/23/2022	08/23/2022 YES

JFS 01610 (2/2005)
Page 1 of 1

Once saved, the report appears as a pdf file in the **Document History** section.

# Navigating Matching Conference Functionality

**Document Details**

Document Category: [redacted] Document Title: JFS 01610 - Child's Permanency Planning Data Summary

Work-Item ID: [redacted] Work-Item Reference: [redacted]

Task ID: 10 Task Reference: [redacted]

**Document History**

ID	Date Created	Employee ID	Name
<a href="#">32756778</a>	06/29/2021 11:01 PM	[redacted]	[redacted]
<a href="#">33411201</a>	12/08/2021 01:45 PM	[redacted]	[redacted]
<a href="#">33447845</a>	12/16/2021 01:31 PM	[redacted]	[redacted]
<a href="#">33852185</a>	03/30/2022 11:52 AM	[redacted]	[redacted]
<a href="#">34260347</a>	07/14/2022 08:56 AM	[redacted]	[redacted]
<a href="#">34526433</a>	09/20/2022 03:25 PM	[redacted]	[redacted]
<a href="#">34673887</a>	11/08/2022 10:54 AM	[redacted]	[redacted]

**Document History**

[Generate Report](#)

# Navigating Matching Conference Functionality

## Viewing the JFS 01610 Report Field Names

When viewing the report, field information pulls from the following areas in Ohio SACWIS:

Ohio Department of Job and Family Services Child's Permanency Planning Data Summary			
Child's name [REDACTED]	Date of birth [REDACTED]	Race White	Juvenile Court case number [REDACTED]
PC filing date 02/01/2021	PC/PS court hearing date	Legally available date 04/06/2021	Assessor assigned and date
Date of child's last foster care placement 06/01/2022	Adoptive placement date	Adoption finalization date	

The **Juvenile Court Case Number** field pulls from any **Court Legal Action** record (not marked as **Created in Error**) where a **Court Case Number** or a **Court ID** has been recorded for the child.

The **PC Filing Date** field pulls from the most recent, either:

- **Complaint** or **Motion**
- Content recorded in the biological case (not marked as **Created in Error**) where a **File Stamped Date** or **Date Submitted Date** has been recorded and the child's **Preferred Primary Disposition** is **PC to Agency**.

The **PC/PS Court Hearing Date** field pulls from the most recent **Hearing Segment** record within the biological case (not marked as **Created in Error**) where the child's **Hearing Type** is **Permanent Custody** or **Voluntary Permanent Surrender**.

The **Legally Available Date** field pulls from the child's most recent **Agency Legal Status** record effective date (not marked as **Created in Error**) where the legal status is either **Permanent Custody (PC)** or **Permanent Surrender (PS)**.

The **Assessor Assigned and Date** field pulls from the **Case ID – Worker Assignment Person** record (first name, last name) where the assigned worker is an **Adoption** worker and the date is the **Worker Assignment Start Date** where the **Assignment Role** is **Adoption Worker**.

## Navigating Matching Conference Functionality

The **Date of Child's Last Substitute Care Placement** field pulls from the child's most recent (not marked as **Created in Error**) effective date of the placement setting (regardless of **Service Description**).

The **Adoptive Placement Date** pulls from the child's most recent (not marked as **Created in Error**) effective date of the placement setting where **Service Description** is **Approved Adoptive Home**.

The **Adoption Finalization Date** pulls from the most recent Court Ruling (not marked as **Created in Error**) where the child's **Journalized Date** or **Date of Ruling** has been recorded for which the **Ruling Type** is **Adoption Finalization**. This date will remain blank if your agency still needs to complete the child's matching conference and the child has not yet finalized into an adoptive home. To have this date pull into the JFS 01610, a report must be generated and saved after the child's finalization has occurred and the appropriate ruling has been recorded in Ohio SACWIS.

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at [SACWIS\\_HELP\\_DESK@jfs.ohio.gov](mailto:SACWIS_HELP_DESK@jfs.ohio.gov) .