

# Recording a Family Team Meeting



**Knowledge Base Article**

# Recording a Family Team Meeting

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# Recording a Family Team Meeting

## Overview

The **Family Team Meeting (FTM)** is Ohio SACWIS functionality added to help support the Protect Ohio Evaluation and document vital information gathered during these meetings.

## Security

**Important:** You must be assigned to the case or assigned with the **FTM Facilitator** User Group to have the **Add Family Team Meeting** button enabled.

## Navigating to the Family Team Meeting Screen

1. On the Ohio SACWIS **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case ID** link of the appropriate case. The **Case Overview** screen appears.
4. Click the **Family Team Meeting** link in the **Navigation** menu.

The screenshot displays the Ohio SACWIS Case Overview interface. The top navigation bar includes tabs for Home, Intake, Case, Provider, Financial, and Administration. The 'Case' tab is active. Below this, a secondary navigation bar shows 'Workload', 'Court Calendar', and 'Placement Requests'. The left-hand navigation menu lists various case management functions, with 'Family Team Meeting' highlighted. The main content area shows details for a case named 'Ongoing', which is marked as 'HAZARD'. Fields include Case Name / ID, Address, Contact, Agency (Department of Job and Family Services), Primary Worker, and Supervisor(s). A 'Case Actions' section contains a warning: 'Case members have unspecified relationships.' Below this is a 'Hazards' table with columns for 'Person / Address' and 'Hazard Type'. At the bottom, there are sections for 'Action Items', 'Case Alerts', 'Dashboard', and 'Assignments / Eligibility'. A 'Results 1 to 3 of 3 / Page 1 of 1' indicator and an 'Actions...' dropdown are also visible.

The **Family Team Meeting Filter Criteria** screen appears displaying the **Family Team Meeting** section below it.

## Adding a New Family Team Meeting

**Reminder:** If the **Add Family Team Meeting** button is grayed out, you are either not assigned to the case or have not been assigned to the **FTM Facilitator** user group, so you will not be able to add a Family Team Meeting.

# Recording a Family Team Meeting

1. Click the **Add Family Team Meeting** button.

The screenshot shows a web application interface with a top navigation bar containing 'Home', 'Intake', 'Case', 'Provider', 'Financial', and 'Administration'. Below this is a secondary bar with 'Workload', 'Court Calendar', and 'Placement Requests'. A left sidebar lists various menu items, with 'Family Team Meeting' highlighted. The main content area features a green notification bar at the top stating 'Your data has been saved.' Below this is a form for 'Family Team Meeting' with fields for 'CASE NAME / ID' (containing 'Ongoing') and a 'HAZARD' indicator. The 'Family Team Meeting Filter Criteria' section includes fields for 'From Date', 'To Date', 'Purpose', 'Status', 'Facilitator', and 'Child'. Below the filters are 'Sort Results By' and 'Created In Error' options. At the bottom of the filter section, a table header is visible with columns: 'FTM ID', 'Date/Time of Meeting', 'Facilitator', 'Purpose', 'Agency/Created By', and 'Status'. A red box highlights the '+Add Family Team Meeting' button located below the table.

The **Family Team Meeting Details** screen appears.

2. On **Family Team Meeting** tab, complete the required fields.

## Important:

- If information is required, a red asterisk (\*) displays next to the field.
- The **Initial Status** field at the bottom of this screen defaults to **Draft**. The field will stay in **Draft** status until later in this process.
- Once the status is changed to **Completed**, the information can no longer be edited.

3. In the **Facilitator Name** field, click the **Search Person** button.

- You must complete a person search to locate the facilitator's name.
- It is highly recommended that each agency keep a list of the facilitator's person ID, as well as the person ID for each employee who will attend the FTM, so that all person IDs used remain consistent.

# Recording a Family Team Meeting

Family Team Meeting	Meeting Outcomes	Attendees
Case ID: <input type="text"/>	Family Team Meeting ID: <input type="text"/>	Completed By: <input type="text"/>
Case Name: <input type="text"/>		
<b>Family Team Meeting Details</b>		
Date of Meeting: * <input type="text"/>	Meeting Start Time: <input type="text"/> AM <input type="text"/>	Meeting End Time: <input type="text"/> AM <input type="text"/>
Facilitator Person ID: <input type="text"/>		
Facilitator Name: * <input type="text"/>	<input type="button" value="Search Person"/>	Description when Other: <input type="text"/>
Facilitator Type: * <input type="text"/>		
Was Transportation Provided?: * <input type="text"/>		Description when Other: <input type="text"/>
Was Child Care Provided?: * <input type="text"/>		
Meeting Location: * <input type="text"/>		
Stated Purpose of FTM: * <input type="text"/>		

The **Person Search Criteria** screen appears.

Enter the appropriate search information into the fields.

4. Click the **Search** button.

Search For Person		
Person ID: <input type="text"/>	- OR -	SSN: <input type="text"/>
<small>Note: If Person ID or SSN are entered, all other search criteria will be ignored</small>		
	OR	
Last Name: <input type="text"/>	First Name: <input type="text"/>	Middle Name: <input type="text"/>
		Gender: <input type="text"/>
DOB: <input type="text"/>	- OR -	Age Range: <input type="text"/> - <input type="text"/>
		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)

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

5. Click the **Select** link in the appropriate row.

# Recording a Family Team Meeting

**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:

Facilitator Sam

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](#)

**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
<input type="button" value="select"/>	Facilitator_Sam/				

[Related Persons](#)

The selected name populates in the **Facilitator Name** field.

As shown in green, if a family assessment was previously completed, the children's information from the most recent family assessment automatically appears in the **Children for which this FTM Concerns** section.

Family Team Meeting	Meeting Outcomes	Attendees				
Case ID: <input type="text"/>	Family Team Meeting ID: <input type="text"/>					
Case Name: <input type="text"/>	Completed By: <input type="text"/>					
<b>Family Team Meeting Details</b>						
Date of Meeting: * <input type="text"/>	Meeting Start Time: <input type="text"/>	Meeting End Time: <input type="text"/>				
Facilitator Person ID: <input type="text"/>	Facilitator Name: <input type="text"/>	Description when Other: <input type="text"/>				
Facilitator Type: <input type="text"/>	Was Transportation Provided?: <input type="text"/>	Description when Other: <input type="text"/>				
Was Child Care Provided?: <input type="text"/>	Meeting Location: <input type="text"/>					
Stated Purpose of FTM: <input type="text"/>						
<b>Children for which this FTM Concerns:</b>						
Person ID	Child's Name	DOB	Age	Gender	FTM Custody	FTM Living Arrangement
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Add Child"/>						

If no children auto-populate, this is what the screen looks like:

# Recording a Family Team Meeting

6. In either case, to add a child, click the **Add Child** button.

The screenshot shows a web form for recording a Family Team Meeting. It is divided into three main sections: 'Family Team Meeting', 'Meeting Outcomes', and 'Attendees'. The 'Family Team Meeting' section contains fields for Case ID, Case Name, Date of Meeting (05/08/2023), Meeting Start Time (08:00 AM), Meeting End Time (10:30 AM), Facilitator Person ID (28829925), Facilitator Name (Facilitator, Sam), Facilitator Type (Facilitator), Was Transportation Provided? (No), Was Child Care Provided? (No), Meeting Location (Agency Setting), and Stated Purpose of FTM (90-Day FTM). There are also 'Description when Other:' fields. Below these fields is a table titled 'Children for which this FTM Concerns:' with columns for Person ID, Child's Name, DOB, Age, Gender, FTM Custody, and FTM Living Arrangement. At the bottom left of this table, there is a red-bordered button labeled 'Add Child'.

The **Available Case Members** screen appears displaying all case members.

7. Click the check box next to the appropriate case member(s).
8. Click the **Save** button.

The screenshot shows the 'Available Case Members' screen. It has a breadcrumb trail: 'Case > Workload > Family Team Meeting > Participants'. It includes fields for Case ID, Case Name, Family Team Meeting ID, and Completed By. Below these is a table with columns for Name, DOB, Age, and Gender. The table contains several rows of data, with the first row highlighted in light blue. A red-bordered box highlights the checkboxes in the first column of the table. At the bottom left, there are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted by a red border.

The **Family Team Meeting Details** screen appears displaying the selected names in the **Children for which this FTM Concerns** section.

9. Click the **Edit** link in the appropriate row.

# Recording a Family Team Meeting

The **Child Information** screen appears.

10. In the **Custody at time of FTM** field, select the appropriate choice from the drop-down list.
11. In the **Living Arrangement at time of FTM** field, select the appropriate choice from the drop-down list.
12. If the Stated Purpose of the FTM selected on the Family Team Meeting tab is one of the Permanency Roundtable options, the **Current Permanency Rating on FTM** field will also appear, select the appropriate choice from the drop-down list.
13. When complete, click the **OK** button.

As shown in green below, the **Family Team Meeting Details** screen appears displaying the selected information in the grid.

## Recording Meeting Outcomes

1. Click the **Meeting Outcomes** tab.

# Recording a Family Team Meeting

Family Team Meeting Meeting Outcomes Attendees

Case ID: [ ] Family Team Meeting ID: [ ]  
Case Name: [ ] Completed By: [ ]

**Family Team Meeting Details**

Date of Meeting: \* 05-04/2023

Meeting Start Time: 08:00 AM Meeting End Time: 10:30 AM

Facilitator Person ID: 28802805

Facilitator Name: \* Facilitator: Sam

Facilitator Type: \* Facilitator

Was Transportation Provided?: \* No

Was Child Care Provided?: \* No

Meeting Location: \* Agency Setting

Stated Purpose of FTM: \* Permanency Roundtable: Initial Meeting

Description when Other: [ ]

Description when Other: [ ]

**Children for which this FTM Concerns:**

Person ID	Child's Name	DOB	Age	Gender	FTM Custody	FTM Living Arrangement
	[ ]	[ ]	[ ]	[ ]	Custody of PCSA	Grandparents
	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]

Narrative  
(expand full screen)

10000

The **Meeting Outcomes: Results of the Meeting** screen appears.

2. Select at least one check box on the screen.
  - In the **Recommended Change in Custody** or **Recommended Change in Living Arrangement** sections, if you select a change from the **Secondary** column, you must select a change in the **Primary** column as well.
  - Only one **Primary** value per section can be selected, but multiple **Secondary** choices can be made.

# Recording a Family Team Meeting

Family Team Meeting		Meeting Outcomes	Attendees
Case ID:	<input type="text"/>	Family Team Meeting ID:	<input type="text"/>
Case Name:	<input type="text"/>	Completed By:	<input type="text"/>
<b>Meeting Outcomes: Results of the Meeting</b>			
<b>Recommended Change in Custody:</b>			
Primary	Secondary	Recommended Change	
<input type="checkbox"/>	<input type="checkbox"/>	Initiate PCSA custody	
<input type="checkbox"/>	<input type="checkbox"/>	Terminate PCSA custody	
<input type="checkbox"/>	<input type="checkbox"/>	Custody to kin (relative or non-relative, temporary or legal custody)	
<input type="checkbox"/>	<input type="checkbox"/>	Protective Supervision Order or extension	
<input type="checkbox"/>	<input type="checkbox"/>	Temporary Custody or extension	
<input type="checkbox"/>	<input type="checkbox"/>	PPLA	
<input type="checkbox"/>	<input type="checkbox"/>	TPR	
<b>Recommended Change in Living Arrangement:</b>			
Primary	Secondary	Recommended Change	
<input type="checkbox"/>	<input type="checkbox"/>	To kinship caregiver	
<input type="checkbox"/>	<input type="checkbox"/>	To foster home	
<input type="checkbox"/>	<input type="checkbox"/>	To other (group home, institution)	
<input type="checkbox"/>	<input type="checkbox"/>	Reunify (or move to other parent)	
<b>Other: *</b>			
		Recommended Change	
<input type="checkbox"/>		Recommended change in visitation time or supervision level	
<input type="checkbox"/>		Identified new or change in services for parent/legal guardian	
<input type="checkbox"/>		Identified new or change in services for children	
<input type="checkbox"/>		Preparation for court hearing	
<input type="checkbox"/>		Case plan developed/signed off on	
<input type="checkbox"/>		Identified support people for parents/caregivers	
<input type="checkbox"/>		Update on family situation	
<input type="checkbox"/>		In Home Safety Plan	
<input type="checkbox"/>		Out of Home Safety Plan	

Apply Save Cancel

## Recording Meeting Attendees

1. Click the **Attendees** tab. The **Attendee Information** screen appears.
2. Click the **Add Attendee** button.

Family Team Meeting		Meeting Outcomes	Attendees		
Case ID:	<input type="text"/>	Family Team Meeting ID:	<input type="text"/>		
Case Name:	<input type="text"/>	Completed By:	<input type="text"/>		
<b>Attendee Information</b>					
<b>Attendees:</b>					
Person ID	Attendee Name/DOB	Role	How Did Attendee Participate	Signature Captured	Delete
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
		Designated Facilitator			<input type="checkbox"/>
					<input type="checkbox"/>

Add Attendee Search Person Delete Check All Clear All

Apply Save Cancel

The **Available Case Members and Case Associated Persons** screen appears.

# Recording a Family Team Meeting

3. Click the check box(es) of the case participants and associated person(s) who attended the Family Team Meeting.
4. Click the **Save** button.

Case > Workload > Family Team Meeting > Attendees

Case ID:  Family Team Meeting ID:

Case Name:  Completed By:

Available Persons						
	Name	DOB	Age		Gender	
<input type="checkbox"/>					Male	
<input type="checkbox"/>					Female	
<input type="checkbox"/>					Male	
<input type="checkbox"/>					Male	
<input type="checkbox"/>					Male	
<input type="checkbox"/>					Male	
<input type="checkbox"/>					Female	

The **Attendee Information** screen appears displaying the selected participants.

5. To locate additional attendees, click the **Search Person** button (shown on the next page). The **Person Search Criteria** screen appears.
6. Use the **Person Search Criteria** screen fields to locate the person.
7. When located, click the **Select** link. The person appears in the **Attendees** grid as shown below.

In the **Role** field, select the appropriate role.

8. In the **How did the Attendee Participate** field, select the appropriate role.
9. In the **Signature Captured** field, select **Yes** or **No**.
10. Repeat the previous three steps for each attendee.
11. When complete, click the **Save** button.

Family Team Meeting		Meeting Outcomes		Attendees		
Case ID:	<input type="text"/>	Family Team Meeting ID:	<input type="text"/>			
Case Name:	<input type="text"/>	Completed By:	<input type="text"/>			
Attendee Information						
Attendees:						
Person ID	Attendee Name/DOB	Role	How Did Attendee Participate	Signature Captured		Delete
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Designated Facilitator	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="button" value="Add Attendee"/>		<input type="button" value="Search Person"/>	<input type="button" value="Delete"/>	<input type="button" value="Check All"/> <input type="button" value="Clear All"/>		

## Recording a Family Team Meeting

The **Family Team Meeting Filter Criteria** screen appears.

### Changing the FTM Status to Completed

To complete the FTM and change the status, complete the following steps:

1. Navigate to the **Family Team Meeting** tab (**Family Team Meeting Filter Criteria** screen) using the previous steps.
2. In the **Status** field at the bottom of the screen, select **Completed** from the drop-down list.
3. Click the **Save** button.

The screenshot shows a web form for recording a Family Team Meeting. At the top, there is a 'Narrative' section with a text area and a '(expand full screen)' link. Below this are 'Spell Check' and 'Clear' buttons, and a character count of '10000'. The 'Status' field is a dropdown menu currently set to 'Draft', which is highlighted with a red box. Below the status field are fields for 'Created Date' (01/26/2023 12:06:25 PM) and 'Modified Date' (05/08/2023 11:46:29 AM), along with 'Created By' and 'Modified By' fields. At the bottom, there are buttons for 'Apply', 'Save' (highlighted with a red box), 'Cancel', and 'Delete Family Team Meeting'.

The **Family Team Meeting** screen appears displaying the saved information.

4. When logging the next FTM for this family, select the **Copy** link to duplicate the previously completed FTM.

**Note:** All active children identified in the first FTM will be copied, as well as all attendees, so this will save time from completing person searches again.

# Recording a Family Team Meeting

Home Intake **Case** Provider Financial Administration

Workload Court Calendar Placement Requests

< >

Case Overview  
 Activity Log  
 Attorney Communication  
 Intake List  
 Safety Assessment  
 Substance Abuse Screening  
 Forms/Notices  
 Category/Pathway Switch  
 Safety Plan  
 Actuarial Risk Assessment  
 Family Assessment  
 Ongoing Case A/I  
 Specialized A/I Tool  
 Law Enforcement  
 Justification/Waiver  
 Case Services  
 Legal Actions  
 Legal Custody/Status  
 Child Support Information  
 Living Arrangement / Guardianship  
 Initial Removal  
 Placement Request  
 Placement/CCA  
 Residential Treatment Information  
 Independent Living  
 Case Plan Tools  
 Visitation Plans  
 Review Tools  
**Family Team Meeting**  
 Safety Reassessment  
 Reunification Assessment

Your data has been saved.

CASE NAME / ID: [ ] Ongoing [ ] HAZARD

Family Team Meeting Filter Criteria

From Date: [ ] To Date: [ ]

Purpose: [ ]

Status: [ ]

Facilitator: [ ]

Child: [ ]

Sort Results By: [ ]  Current Episode  View Historical

Created In Error:  Exclude  Include

Filter Clear Form

Family Team Meeting

Results: 1 to 1 of 1 / Page 1 of 1

	FIM ID	Date/Time of Meeting	Facilitator	Purpose	Agency/Created By	Status
view	5330075	05/08/2023 00:00 AM	Facilitator, Sam	Permanency Roundtable: Initial Meeting	[ ] Department of Job and Family Services	Completed
edit						

Associated Children: [ ]

Add Family Team Meeting

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