

Recording an Appeal on a Ruling Record



Knowledge Base Article

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Recording an Appeal on a Ruling Record

Overview

This Knowledge Base Article discusses how to record an appeal for Rulings Received on a **Ruling** record, including for a legal status of **Permanent Custody**. This functionality also allows you to record an appeal on a **Ruling** record for each person and for each **Ruling Received** as needed.

Navigating to the Legal Actions Screen

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 **Legal Actions** link in the **Navigation** menu.

Note: As shown in green, the radio button default to **Persons Under Age 22**, but it can be changed to **All Persons**.

5. Click the **Maintain Legal Action** link for the appropriate child.

The screenshot displays the Ohio SACWIS Case Overview screen. The top navigation bar includes tabs for Home, Intake, Case (highlighted in green), Provider, Financial, and Administration. Below this, a sub-navigation bar shows Workload (highlighted in green), Court Calendar, and Placement Requests. A left-hand navigation menu lists various case management functions, with 'Legal Actions' highlighted in a red box. The main content area shows case details for 'Sacwis, Susie / 123456', including a 'HAZARD' status and a 'Filter' button. Below the filter, a table titled 'Case Legal Actions / Delinquency Participants' displays two participants: 'Sacwis, Susie' and 'Lane, Lois'. For each participant, there are links for 'Maintain Legal Action' (highlighted in a red box) and 'Maintain Delinquency'.

Case Participants	DOB		
Sacwis, Susie	05/09/2006	Maintain Legal Action	Maintain Delinquency
Lane, Lois	12/22/2001	Maintain Legal Action	Maintain Delinquency

The **Participant Legal Action Information** screen appears.

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Adding an Appeal Record

1. Click the **Expand All** link to expand the grids.

Participant Legal Action Filter Criteria

☒ Current Episode ☐ View Historical Created In Error: ☒ Exclude ☐ Include

Filter

Participant Legal Action Information

Legal Action: **Add Legal Action and Grouping** **Expand All**

☐ Legal Actions Group Beginning with a Ruling Effective Date: 06/23/2022

The Legal Action Information grid expands.

2. Click the **Edit** link in the appropriate **Ruling** grid row.

Participant Legal Action Information

Legal Action: **Add Legal Action and Grouping** [Collapse All](#)

☐ Legal Actions Group Beginning with a Ruling Effective Date: 06/23/2022

Legal Action Information

	Date	Legal Action	Type	Additional Info	Court Info	Created in Error	Move
edit COPY	10/11/2022	Ruling	Disposition	Rulings Received: Best Interest, Reasonable Efforts to Finalize the Permanency Plan, Temporary Custody	Court Case #:		<input type="checkbox"/>
edit COPY	08/25/2022	Ruling	Adjudicatory	Rulings Received: Adjudicated Dependent, Best Interest, Reasonable Efforts to Finalize the Permanency Plan	Court Case #:		<input type="checkbox"/>
edit COPY	06/23/2022	Ruling	Custody	Rulings Received: Best Interest, RE to Prevent Removal - Initial, Temporary Custody Agency Legal Status: Temporary Custody/Placement and Care	Court Case #:		<input type="checkbox"/>

Legal Action: **Add Action**

The **Ruling Information** screen appears.

Ruling Information

Date of Ruling:* 09/28/2022

Action Participant:* Test, Child

Court Name: Test Co. Probate/Juvenile Court

Court Address:

Court Case Number: 20223071

Court ID Number:

Judge/Magistrate: Test, Judge

County:

Ruling Type:* Dispositional

Journalized Date: 10/11/2022

Last Modified Date: 10/17/2022

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Legal Status	Effective Date	Termination Date	Termination Reason
Temporary Custody/Placement and Care	06/23/2022		terminate

Add Legal Status

Appeal Information

Add Appeal / Objection

Jurisdiction Transfer Information

3. Click the **Add Appeal / Objection** button.

The **Appeals Information Details** screen appears.

Important: When the **Add Appeal / Objection** button is clicked, notice that the values selected in the **Selected Rulings Received** field (shown above) are the **only values** that appear in the **Ruling(s) Received Selected on Ruling** field (shown on the next page). In other words, whatever values are selected on the **Ruling Information** screen appear on the **Appeals Information Details** screen and those are the only values that can be selected for appeal.

Completing the Appeals Information Details Screen


As shown on the next page:

1. In the **Appeal File Date** field, select the appropriate date.
2. In the **Person Appealing the Ruling** field, click the **Person Search** button to locate the appropriate person.
3. In the **Legal Status Involved in Appeal** field, select **Yes** or **No**.
4. In the **Ruling(s) Received Selected on Ruling** field, select the appropriate value(s).
5. Click the **Add >>** button. The value(s) move to the **Ruling(s) Received being Appealed** field.
6. Click the **OK** button.

Recording an Appeal on a Ruling Record

Appeal Information Details

Appeal File Date:*



Person Appealing the Ruling:*

Person Search

~ OR ~

☐ Appeal filed on behalf of:

Legal Status Involved in Appeal:*

Ruling(s) Received Selected on Ruling:

Add

Best Interest


RE to Finalize Permanency Plan - Subsequent

Temporary Custody

Ruling(s) Received Being Appealed: *

Remove

Appeal Outcome Date:












Appeal Outcome:

OK

Cancel

The **Ruling Information** screen appears displaying the information in the **Appeal Information** section as shown in green.

7. Repeat these steps as needed to record an appeal for other rulings received.
8. When complete, click the **Save** button to save the ruling.

Ruling Information			
Date of Ruling:*	09/26/2022 	Court Case Number:	2022 
Action Participant:*	Test, Child	Court ID Number:	
Court Name:	Test Co. Probate/Juvenile Court 	Judge/Magistrate:	Test, Judge 
Court Address:		County:	Test
<hr/>			
Ruling Type:*	Dispositional 	Last Modified Date:	08/11/2023
Journalized Date:	10/11/2022 		
<hr/>			
Ruling(s) Received:		Selected Rulings Received:	
<div><div></div><div><div>Active Efforts (ICWA)</div><div>Added as a Party to Case</div><div>Adjudicated Abused</div><div>Adjudicated Delinquent</div><div>Adjudicated Dependent</div><div>Adjudicated Deserted Child/Safe Hvn Baby</div><div>Adjudicated Neglected</div><div>Adjudicated Unruly</div></div><div>Add</div></div>		<div><div>Remove </div><div>Best Interest</div><div>RE to Finalize Permanency Plan - Subsequent</div><div>Temporary Custody</div></div>	

Congregate Care Placement Setting Information

Recording an Appeal on a Ruling Record

Appeal Information						
Appeal File Date	Person/Agency Appealing the Ruling	Legal Status Involved in Appeal	Ruling(s) Received Being Appealed	Appeal Outcome Date	Appeal Outcome	
edit 08/11/2023	Test County Children Services Board	Yes	Best Interest			delete
Add Appeal / Objection						
Jurisdiction Transfer Information						
	Receiving Agency Name	Court Acceptance Date				
Associate Jurisdiction Transfer						
<input type="checkbox"/> Ruling has been Created in Error						
Save	Cancel					

The **Participant Legal Action Information** appears. Within the Legal Action grid you will see your saved **Under Appeal** in red next ot he appropriate person.

Participant Legal Action Information

Legal Action:
Add Legal Action and Grouping

Legal Actions Group Beginning with a Ruling

Effective Date: 06/23/2022

Legal Action Information							
	Date	Legal Action	Type	Additional Info	Court Info	Created in Error	Move
edit copy	10/11/2022	Ruling	Disposition	Rulings Received: Best Interest, Reasonable Efforts to Finalize the Permanency Plan, Temporary Custody Under Appeal	Court Case #: 202		<input type="checkbox"/>
edit copy	08/25/2022	Ruling	Adjudicatory	Rulings Received: Adjudicated Dependent, Best Interest, Reasonable Efforts to Finalize the Permanency Plan	Court Case #: 2022		<input type="checkbox"/>
edit copy	06/23/2022	Ruling	Custody	Rulings Received: Best Interest, RE to Prevent Removal - Initial, Temporary Custody Agency Legal Status: Temporary Custody/Placement and Care	Court Case #: 202		<input type="checkbox"/>

Legal Action:
Add Action

Important Information about Appeals:

- You can enter an appeal record as many times as needed.
- You cannot duplicate the person appealing the rulings, the rulings received and/or the appeal file date (when no appeal outcome is recorded).

Example: Mom a ruling received of permanent custody on 01/01/2012. The appeal was **Overruled/Ruling Upheld**. (Mom lost the appeal and will be appealing to a higher court.)

- You can record an appeal separately for each **Ruling Received**.
- Once an appeal record has been resolved with the entry of an **Appeal Outcome** and **Appeal Outcome Date**, then a new appeal record can be recorded for the same person and the same rulings received.
- Upon saving a **Ruling Record**, if an **Appeal** record has been created (regardless of if an **Appeal Outcome Date** or **Appeal Outcome** has been entered) you cannot remove any **Rulings Received** from the **Ruling** record that had been selected in the **Appeal** record for **Ruling(s) Received Being Appealed**.

Recording an Appeal on a Ruling Record

- You cannot have multiple appeals without an **Appeal Outcome** for the same person (appealing the ruling) and the same values selected in the **Ruling(s) Received** being appealed within a given ruling record. If this occurs, the following system-generated **Validation Message** appears upon save: **Cannot have overlapping appeal records without an appeal outcome for the same person (appealing the ruling) and the same values selected in the Ruling(s) Received being appealed.**
- When an **Appeal** record has been created/saved, no appeal outcome has been entered, and the **Legal Status Involved in Appeal** is marked as **Yes**, a notification will be sent to users with a role of **Adoption Worker** and the **Primary Worker** assigned to the case from which ruling was created, as well as their respective supervisors and court workers for the case-owning agency. The notification message will say: **An appeal record has been recorded for <child name: person ID> for a Ruling against Ruling(s) Received and the child's current legal status record.**

Editing the Appeal Information Details Screen

When the appeal decision has been issued, complete the following steps:

- Repeat the steps in the previous section to navigate to the **Appeal Information Details** screen.
- On the **Legal Action Information** screen, select the **Edit** link in the appropriate **Ruling** grid row.

The screenshot shows the 'Legal Action Information' screen. At the top, there is a 'Legal Action:' dropdown menu and an 'Add Legal Action and Grouping' button. Below this is a section titled 'Legal Action Information' which contains a table. The table has columns: Date, Legal Action, Type, Additional Info, Court Info, Created in Error, and Move. The first row is highlighted in blue and has an 'edit' link in the first column. The second row is also highlighted in blue. The third row is not highlighted. Below the table, there is another 'Legal Action:' dropdown menu and an 'Add Action' button.

	Date	Legal Action	Type	Additional Info	Court Info	Created in Error	Move
edit	10/11/2022	Ruling	Disposition	Rulings Received: Best Interest, Reasonable Efforts to Finalize the Permanency Plan, Temporary Custody Under Appeal	Court Case #: 202		<input type="checkbox"/>
edit	08/25/2022	Ruling	Adjudicatory	Rulings Received: Adjudicated Dependent, Best Interest, Reasonable Efforts to Finalize the Permanency Plan	Court Case #: 2022		<input type="checkbox"/>
edit	08/23/2022	Ruling	Custody	Rulings Received: Best Interest, RE to Prevent Removal - Initial, Temporary Custody Agency Legal Status: Temporary Custody/Placement and Care	Court Case #: 202		<input type="checkbox"/>

The **Ruling Information** screen appears.

- Select **Edit** next the appropriate Appeal.

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Appeal Information						
Appeal File Date	Person/Agency Appealing the Ruling	Legal Status Involved in Appeal	Ruling(s) Received Being Appealed	Appeal Outcome Date	Appeal Outcome	
add 08/11/2023	Test County Children Services Board	Yes	Best Interest			delete

- Enter the appropriate date in the **Appeal Outcome Date** field.
- Select the appropriate value in the **Appeal Outcome** field.
- Click the **OK** button.

Appeal Information Details

Appeal File Date:*

08/11/2023

Person Appealing the Ruling:*

Person Search

~ OR ~

☒ Appeal filed on behalf of:

Test County Children Services Board

Legal Status Involved in Appeal:*

Yes

Ruling(s) Received Selected on Ruling:

RE to Finalize Permanency Plan - Subsequent

Temporary Custody

Ruling(s) Received Being Appealed: *

Best Interest

Appeal Outcome Date:

08/11/2023

Appeal Outcome:

Appeal Overruled/Ruling Upheld

OK

Cancel

The **Ruling Information** screen appears displaying the outcome as shown in green.

- When complete, click the **Save** button at the bottom of the **Ruling Information** screen.

Appeal Information

Appeal File Date	Person/Agency Appealing the Ruling	Legal Status Involved in Appeal	Ruling(s) Received Being Appealed	Appeal Outcome Date	Appeal Outcome
view 08/11/2023	Test County Children Services Board	Yes	Best Interest	08/11/2023	Appeal Overruled/Ruling Upheld

Add Appeal / Objection

Jurisdiction Transfer Information

Receiving Agency Name	Court Acceptance Date
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Associate Jurisdiction Transfer

☐ Ruling has been Created in Error

Save

Cancel

The **Legal Action Filter Criteria** screen appears displaying a message that your data has been saved.

Recording an Appeal on a Ruling Record

Important information about Appeals:

- When you save an appeal record with an outcome of **Appeal Sustained /Ruling Vacated**, the following notifications will be sent:

- Notification to the **FCM and Adoption Subsidy Workload** person(s) assigned. If no person is assigned, then the following message will be sent to all fiscal workers for the case owner agency:

Notification message: An appeal record has been resolved with an Appeal Outcome of Appeal Sustained /Ruling Vacated for <child name: person ID>. Please review the Appealed Ruling Record to determine if any FCM/ Adoption Subsidy eligibility determination need to be updated/ ended.

- Notification to users with a role of **Adoption Worker** and the **Primary Worker** assigned to the case from which the ruling was created, as well as their respective supervisors and court workers for the case-owning agency.

Notification message: An appeal record has been resolved with an Appeal outcome of Appeal Sustained /Ruling Vacated for <child name: person ID>. Please review the Appealed Ruling Record to determine if there is any impact to the Case Management services for this child which may or may not include updates to the legal status and placement records.

- When you save an appeal record with an outcome of **Appeal Overruled /Ruling Upheld** and the **Legal Status involved in Appeal** is marked as **Yes**, a notification will be sent to users with a role of **Adoption Worker** and the **Primary Worker** assigned to the case from which ruling was created, as well as their respective supervisors, and court workers for the case-owning agency.

Notification message: An appeal record has been resolved with an Appeal Outcome of Appeal Overruled /Ruling Upheld for <child name: person ID>. Please review the original Ruling Record to determine if there is any impact to the Case Management services for this child.

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Important Information about Appeals, Continued:

- You cannot close a case that has an unresolved appeal record.
- You cannot transfer a case that has any unresolved appeal records.
- If an **Appeal Outcome Date** is recorded, then an **Appeal Outcome** must be recorded. If an **Appeal Outcome** is recorded, then an **Appeal Outcome Date** must also be recorded.
- Once an Appeal outcome has been recorded, you cannot delete the appeal record.
- You can delete an appeal record prior to recording an appeal outcome/date.
- The **Appeal Information Details** screen is locked once the **Appeal Outcome Date** and **Appeal Outcome** has been recorded and saved.
- As shown in the screen shot, the **Participant Legal Actions Information** screen will either indicate **Under Appeal OR** the value once one has been recorded (**Appeal Outcome <value>**).

Participant Legal Action Information Screen:

Participant Legal Action Information

Legal Action: [Add Legal Action and Grouping](#) [Expand All](#)

Legal Actions Group Beginning with a Ruling Effective Date: 06/23/2022

	Date	Legal Action	Type	Additional Info	Court Info	Created in Error	Move
edit copy	10/11/2022	Ruling	Disposition	Rulings Received: Best Interest, Reasonable Efforts to Finalize the Permanency Plan, Temporary Custody Under Appeal	Court Case #: 202		<input type="checkbox"/>
edit copy	08/25/2022	Ruling	Adjudicatory	Rulings Received: Adjudicated Dependent, Best Interest, Reasonable Efforts to Finalize the Permanency Plan	Court Case #: 2022		<input type="checkbox"/>
edit copy	06/23/2022	Ruling	Custody	Rulings Received: Best Interest, RE to Prevent Removal - Initial, Temporary Custody Agency Legal Status: Temporary Custody/Placement and Care	Court Case #: 202		<input type="checkbox"/>

Legal Action: [Add Action](#)

Participant Legal Action Information

Legal Action: [Add Legal Action and Grouping](#) [Expand All](#)

Legal Actions Group Beginning with a Ruling Effective Date: 06/23/2022

	Date	Legal Action	Type	Additional Info	Court Info	Created in Error	Move
edit copy	10/11/2022	Ruling	Disposition	Rulings Received: Best Interest, Reasonable Efforts to Finalize the Permanency Plan, Temporary Custody Appeal Outcome: Appeal Overruled/Ruling Upheld	Court Case #: 2022		<input type="checkbox"/>
edit copy	08/25/2022	Ruling	Adjudicatory	Rulings Received: Adjudicated Dependent, Best Interest, Reasonable Efforts to Finalize the Permanency Plan	Court Case #: 2022		<input type="checkbox"/>
edit copy	06/23/2022	Ruling	Custody	Rulings Received: Best Interest, RE to Prevent Removal - Initial, Temporary Custody Agency Legal Status: Temporary Custody/Placement and Care	Court Case #: 2022		<input type="checkbox"/>

Legal Action: [Add Action](#)

Recording an Appeal on a Ruling Record

Important Information about Appeals, Continued:

Legal Status Information Screen:

Legal Status Information

Legal Status	Effective Date	Termination Date	Termination Reason	
Temporary Custody/Placement and Care	08/23/2022			terminate

Add Legal Status

Appeal Information

	Appeal File Date	Person/Agency Appealing the Ruling	Legal Status Involved in Appeal	Ruling(s) Received Being Appealed	Appeal Outcome Date	Appeal Outcome
view	08/11/2023	Test County Children Services Board	Yes	Best Interest	08/11/2023	Appeal Overruled/Ruling Upheld

Add Appeal / Objection

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