

# Linking Intake Participants to a Case



**Knowledge Base Article**

# Linking Intake Participants to a Case

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# Linking Intake Participants to a Case

## Overview

This article reviews how to Link an Intake Participant to a case within the Ohio SACWIS system. Users can choose which, if any, **Intake Participants** to add as **Active Case Participants** upon the linking of an **Intake** to a **Case**.

## Determining the Case to which the Intake should be Linked

1. From the **Home** screen, click the **Intake** tab. The **Intake Workload** screen appears.
2. Click the **Link** hyperlink next to the **Intake** that is being linked to a **Case**

Claimed By	Intake ID / Screening Priority	Workload Name	Category	Date/Time Received	Screener Name / SDM Name	Status	Status Date/Time
		Test	CA/N Report	01/23/2024 2:21 PM	Caseworker Caseworker	Screened Out	01/24/2024 9:13 AM

The **Link Case** screen appears, listing all existing cases in which the **Intake Participants** are **Active** or **Historical** members.

3. Click the Case Name hyperlink to access the Case record.

**Note:** Use the list of **Active Case Members** and/or access the **Case** record to help determine if this is the correct **Case** to which the **Intake** should be linked.

**Important:** When appropriate, the user can also elect to create a new case by clicking the **Create Case** button.

Link to Existing Case

Case Name / ID	Case Status	Case Category	Status Date	Agency
<a href="#">Sacwis, Susie / 123456</a>	Closed	Alternative Response Assessment	11/01/2019	County Children Services Board

  

Case Members	Relationship to CRP:	Status
Test, Mother / 121212 Female Age 27, DOB 07/17/1996	Biological Mother	INACTIVE
Test, Daughter / 131313 Female Age 14, DOB 11/10/2009	Biological Daughter	ACTIVE

  

Sorrell, Michael / 27872022 Male Age 46, DOB 03/18/1977	<b>Create Case</b>	Cancel	ACTIVE
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## Linking Intake Participants to a Case

- Click the **Link** hyperlink to select the **Case** to which to link the **Intake**.

Link to Existing Case

Case(s)					
	Case Name / ID	Case Status	Case Category	Status Date	Agency
<a href="#">link</a>	Sacwis, Susie / 123456	Closed	Alternative Response Assessment	11/01/2019	County Children Services Board
<a href="#">Case Members</a> ^					

The **Link to Existing Case** screen appears.

## Selecting the Intake Participants to add to a Case

The **Link to Existing Case** screen is divided into three sub-sections.

**Link to Existing Case**

CASE NAME / ID: Sacwis, Susie / 123456 **Alternative Response Assessment**  
Closed (11/01/2019)

AGENCY NAME: County Children Services Board

**Active Case Member(s)**

Person Name / ID	Age, DOB	Effective Date	Relationship to GRP
Sacwis, Susie / 123456	Age 47, DOB 08/22/1976	09/15/2003	Case Reference Person
Test, Daughter / 121212	Age 14, DOB 11/10/2009	10/01/2019	Biological Daughter

**Active Associated Person(s)**

Person Name / ID	Age, DOB	Effective Date	Association
Test, Adult / 141414	Age 27, DOB 07/17/1996	10/01/2019	Adult

**Intake Participant(s)**

Person Name / ID	Age, DOB
<b>HAZARD</b> Test, Adult / 111111	Age 47, DOB 08/22/1976
Test, Adult / 222222	Age 14, DOB 11/10/2009
	Age 46, DOB 03/18/1977

[Link To Existing Case](#) [Cancel](#)

The **Case Information** section (outlined in red) displays the basic case information such as the case name, case status, etc.

The **Active Case Member** section (outlined in green) displays the current active case members.

## Linking Intake Participants to a Case

The **Active Associated Persons** section (outlined in gold) displays the active associated persons on the selected case.

The **Intake Participant** section (outlined in blue) lists the participants for the intake that the user is linking to the selected case.

**Intake Participants** who are **NOT** currently **Active Members** of the selected case or not currently **Active Associated Persons** will display with a **Checkbox** and are available to be added as **Case Members**. This includes **Inactive Case Members** who may need to be reactivated.

1. Select the available **Intake Participants** (if any) to add as **Active Case Members** by marking the applicable **Checkboxes**

The screenshot shows a section titled "Intake Participant(s)" with a table of participants. The table has two columns: "Person Name / ID" and "Age, DOB". The first row is highlighted in red and has a "HAZARD" label. The first row has a checked checkbox. Below the table are two buttons: "Link To Existing Case" (highlighted in red) and "Cancel".

	Person Name / ID	Age, DOB
<input checked="" type="checkbox"/>	HAZARD Test, Adult / 1111111	Age 47, DOB 08/22/1976
<input type="checkbox"/>	Test, Child / 222222	Age 14, DOB 11/10/2009
<input type="checkbox"/>	Test, Adult / 12121212	Age 46, DOB 03/18/1977
<input type="checkbox"/>	Test, Adult / 131313	

2. Click the **Link to Existing Case** button to link the **Intake** to the Case.

**Note:** If you have determined that the intake should **NOT** be linked to this case, click the **Cancel** button to return to the **Link Case** screen and make a different selection.

The screenshot shows a confirmation message: "Intake # has been linked to Case #". Below the message is a section titled "Intake Workload" with an "Add Intake" button, a "View by:" dropdown menu set to "Default", and a "Filter" button.

Message displays confirming the **Intake** has been linked to the **Case**.

# Linking Intake Participants to a Case

## Viewing the Case Members Tab on the Case Record

The selected **Intake Participants** have been added to the **Active Case Members** list. The **Begin Date** of the participant record is equal to the **Screening Decision Date** on the Intake.

CASE NAME / ID: Sacwis, Susie / 123456 Alternative Response Assessment / Closed  
(11/01/2019) HAZARD

Case Detail | Members | Relationships | Associated Persons

Case Members

Active Member List

Warning: Changing the Case Reference Person will change the Case Name and Case Address

	CRP	Case Member	Begin Date
<a href="#">view</a>	<span style="color: red; font-weight: bold;">HAZARD</span>	Sacwis, Susie / 123456 Female Age 47, DOB 08/22/1976 Race: White Hispanic/Latino: No	09/15/2003
<a href="#">view</a>		Test, Adult / 121212 Male Age 46, DOB 03/18/1977 Race: White Hispanic/Latino: No	10/01/2019

1. Click on the **Relationships** tab to record the **Relationships** for the newly added **Case Members**.

**Important Note:** If the **Intake** is subsequently **Unlinked** from the **Case**, any **Case Members** which were added to the **Case** will remain linked **Case Members**. If the members should **NOT** be linked to the **Case**, go to the **Case Members** screen and delete them **PRIOR** to unlinking the intake.

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at [sacwis\\_help\\_desk@childrenandyouth.ohio.gov](mailto:sacwis_help_desk@childrenandyouth.ohio.gov).