**Generating the SAR/Case Review Due Date Report**

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**Knowledge Base Article**

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**Overview**

The **SAR/Case Review Due Date Report** is a planning tool that assists caseworkers and supervisors in scheduling **SARs** and **Case Reviews** within the required timeframes.

Ohio SACWIS staff has worked closely with Monitoring and Policy staff to ensure that the **SAR/Case Review Due Dates** are accurately calculated according to the requirements.

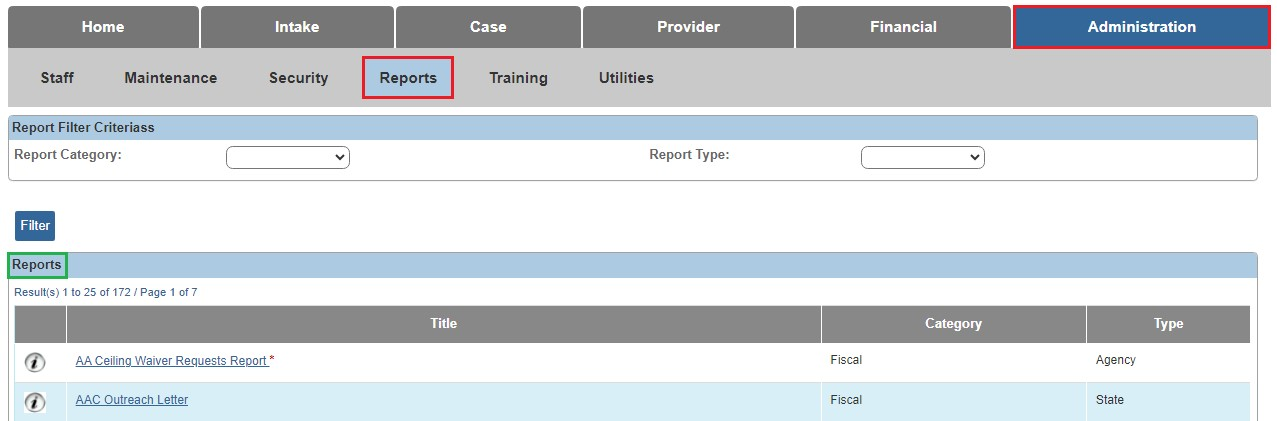
According to **Case Review** and **SAR** rule requirements, which are outlined in **5101:2-3809** and **5101:2-38-10**, whichever of the following activitiesoccurs first begins the Case Review/SAR timeline:

* The original court complaint date
* The date of placement
* The date of court order protective supervision
* The date of parent, guardian, or custodian’s signature on the case plan, for in home supportive services only.

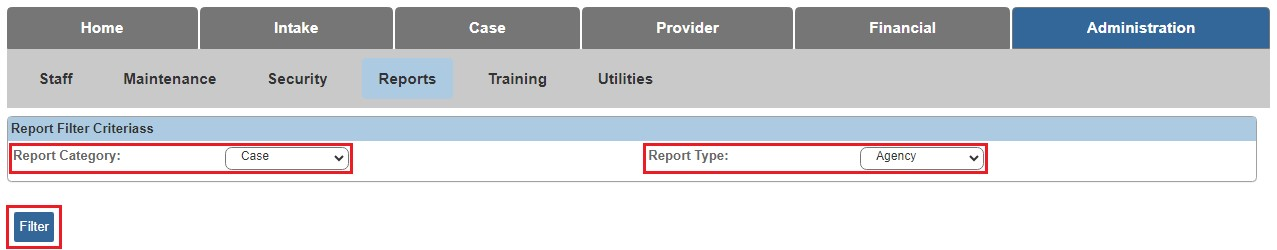
**Case Reviews** are due every **90 Days** from the date of the originating activity. **SARs** are due every **180 Days** from the date of the originating activity.

**Navigating to the Report**

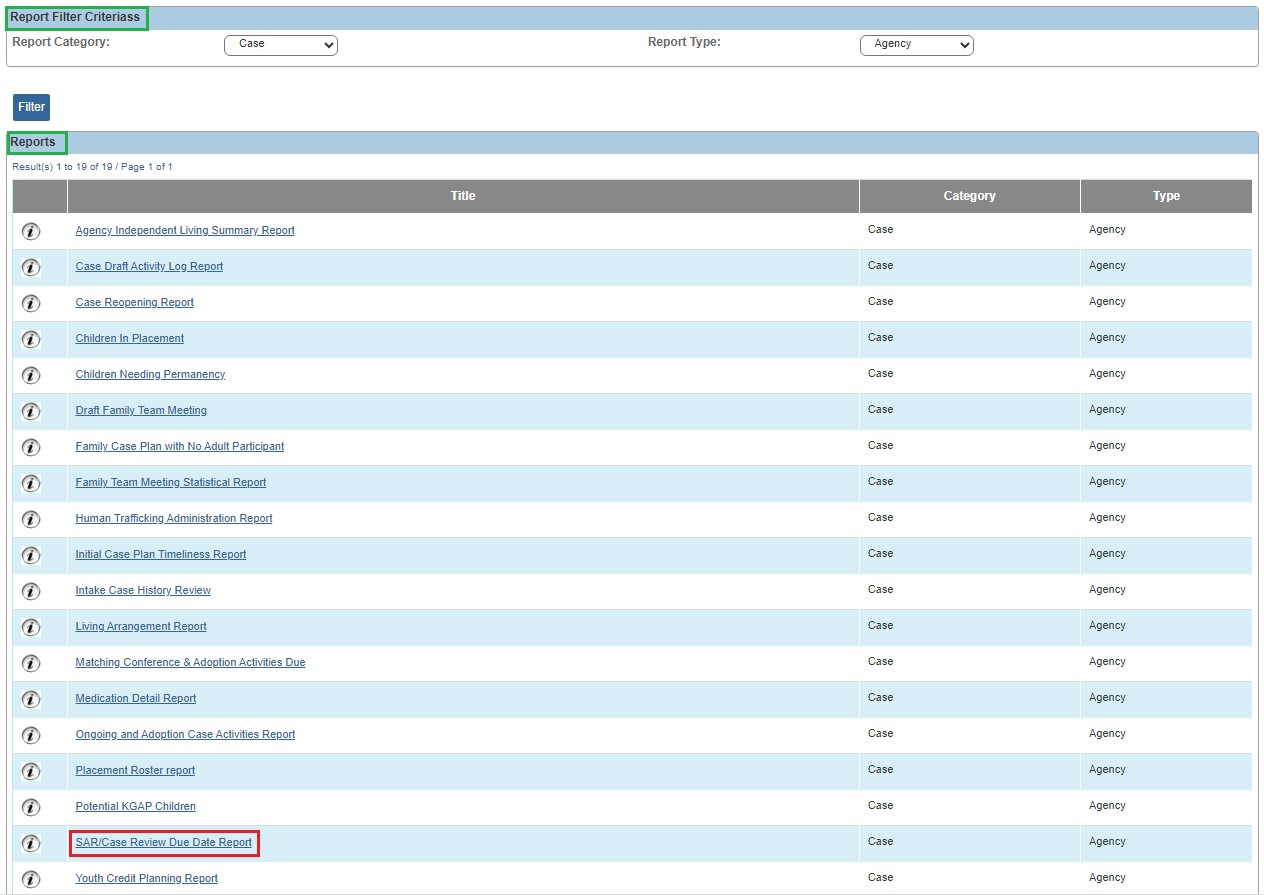
1. From the Ohio SACWIS **Home** screen, click the **Administration** tab.
2. Click the **Reports** tab.



The **Reports Filter Criteria** screen appears.



1. Select **Case** from the **Report Category** dropdown.
2. Select **Agency** from the **Report Type** dropdown.

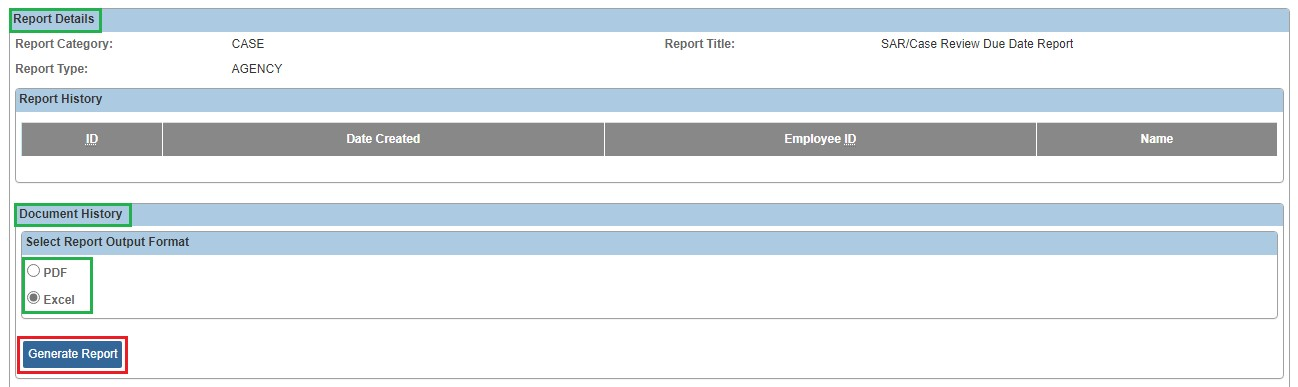


1. Click the **SAR/Case Review Due Date Report** link.

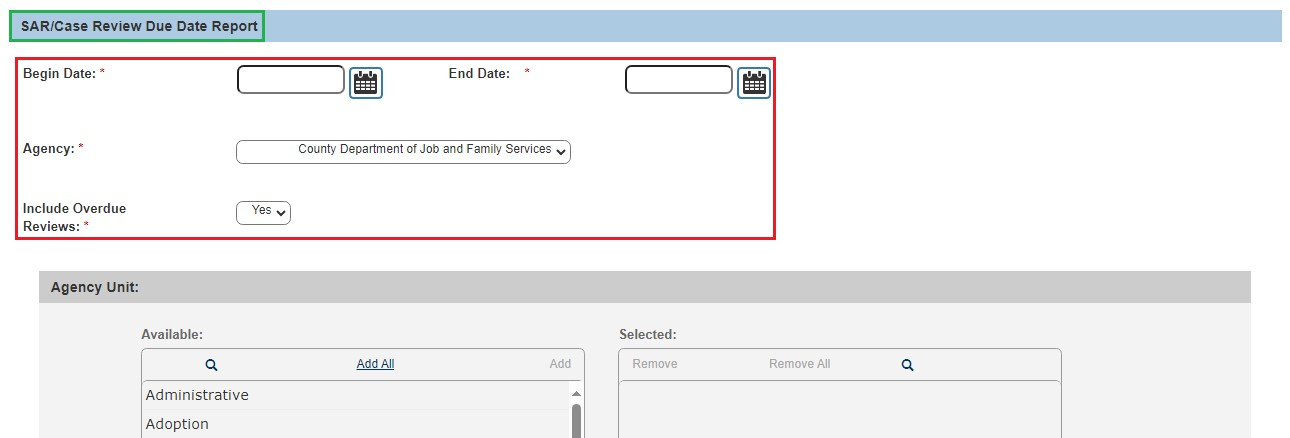
The **Report Details** screen appears.

**Generating the Report**

1. Select the **Report Output Format** (PDF or Excel).
2. Click the **Generate Report** button.



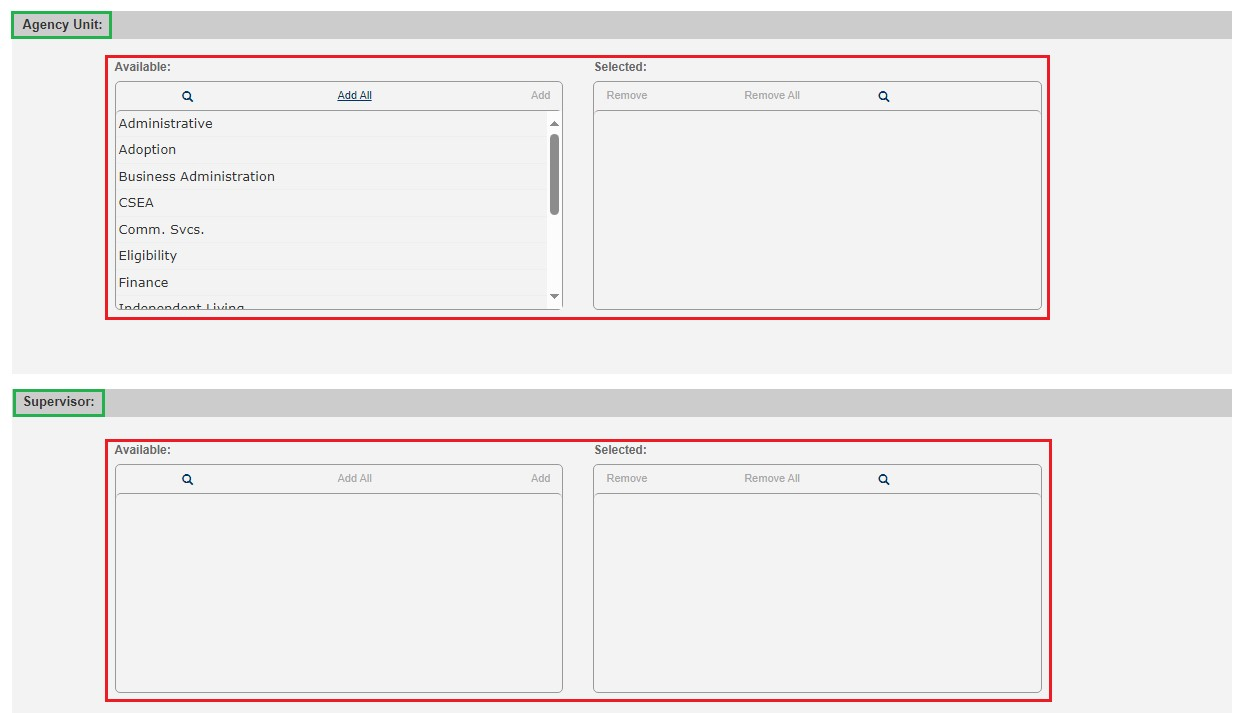
The **SAR/Case Review Due Date Report** parameter page appears.

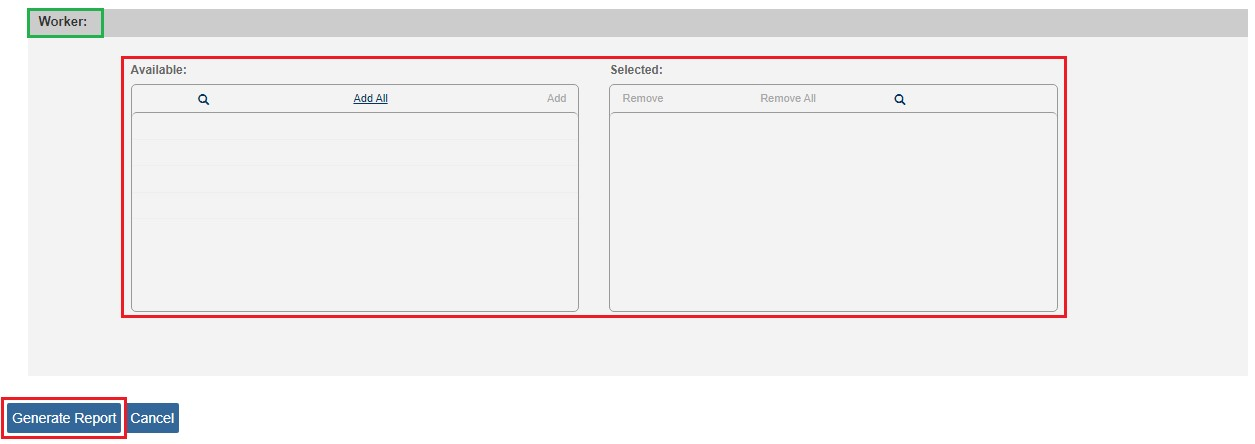


1. Enter the **Begin Date** (Required)
2. Enter the **End Date** (Required)
3. Select the **Agency** (Required)
4. Select Yes or No for **Include Overdue Reviews** (Required)

**Note:** County users will only be able to generate the report for their own agency. State users will be able to select multiple agencies.

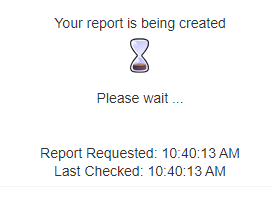
1. Use the **Add>** and **<Remove** buttons to select the **Agency Unit(s)**, if necessary.
2. Use the **Add>** and **<Remove** buttons to select the **Supervisor(s),** if necessary.
3. Use the **Add>** and **<Remove** buttons to select the **Worker(s),** if necessary.





1. Click the **Generate Report** button.

A message appears stating **your report is being created**.



The Report Confirmation screen appears when the report has run successfully.



1. If the report does not open, select the **Click here to open report** link.

1. Click the **Save** button in order to save the generated report to the **Report History**.

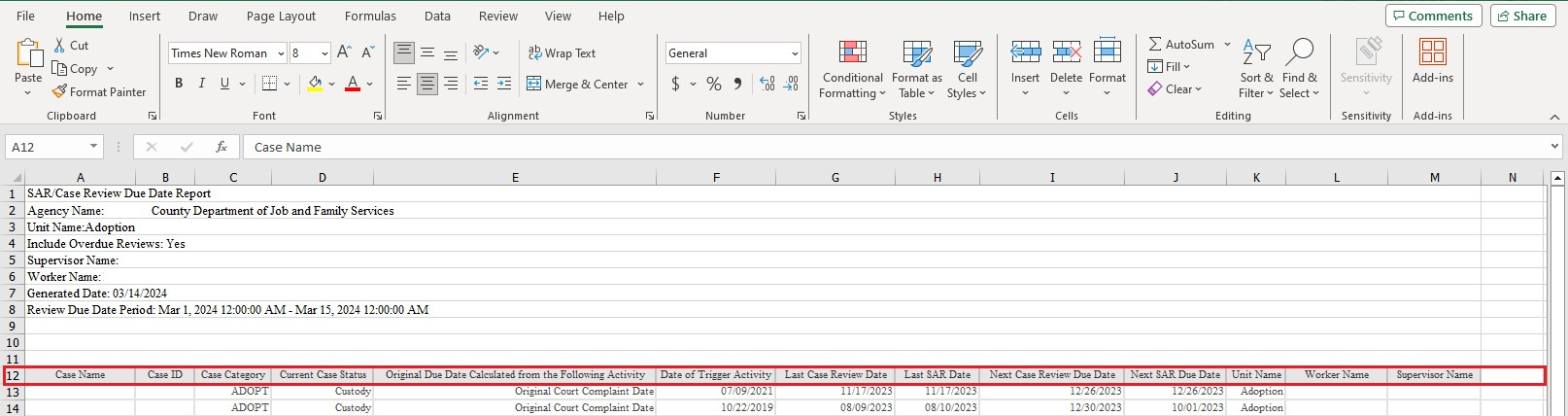
1. Select **Review Parameters** to return to the **Report Parameters** screen.

The **SAR/Case Review Due Report** appears in excel format (suggested).

**Applying Excel Filters to the Visitation Details**

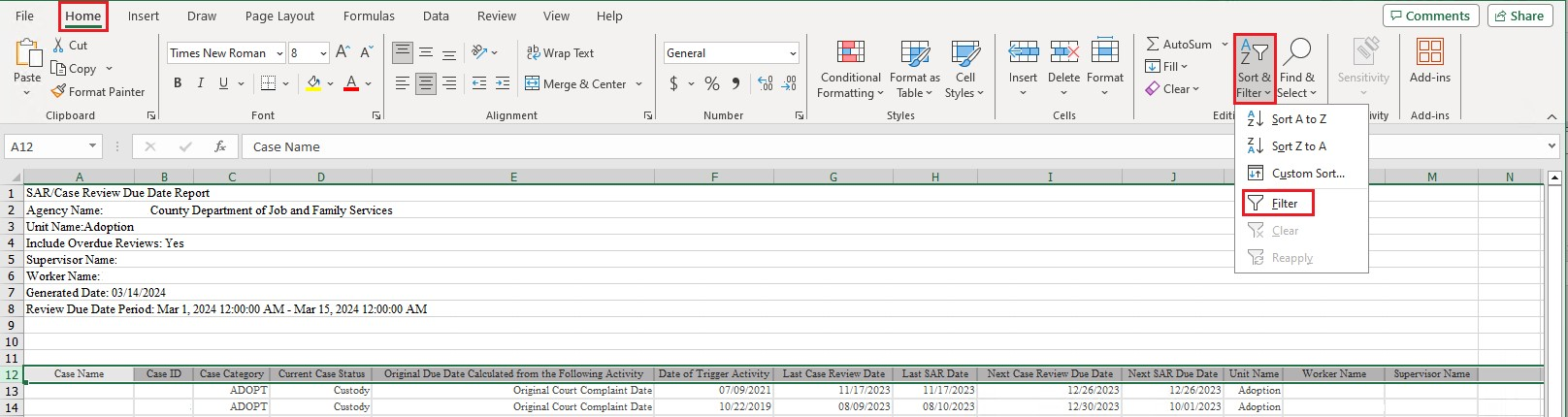
1. Select the **Row** that containing the data element **Column Headers.**

**Hint:** Place your cursor on the **Row Number** to highlight the row.

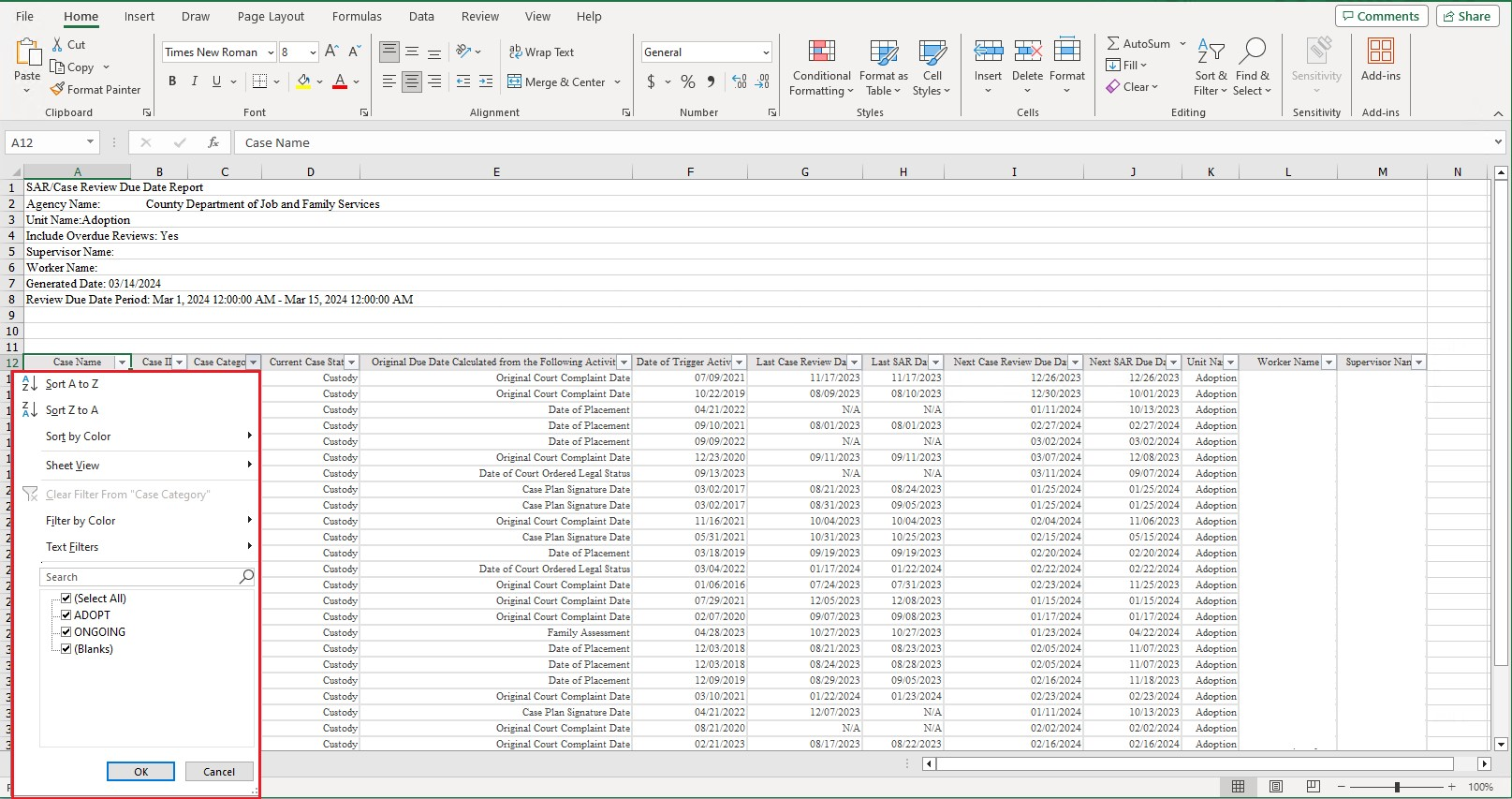


1. From the **Home** tab, once the row is highlighted, click the **Sort & Filter** button.
2. Select **Filter**.

Drop down **Filter Arrows** will appear on each cell in the highlighted **Row**.



1. Click the **Filter Arrow** for the **Column** you wish to filter.



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) .