

# **Linking Intakes to a Case**



**Knowledge Base Article**

# Linking Intakes to a Case

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# Linking Intakes to a Case

## Overview

This Knowledge Base Article (KBA) describes how to link an **Intake** to a **Case**, including an open **Adoption Case**. It describes the functionality that (in some instances) allows users to select which **Intake Participants** to add as **Active Case Participants** when linking an **Intake**.

Based on **Intake Category** and the **Intake Type**, certain rules apply as described in this article when linking to an **Adoption Case**.

## Viewing Intake Warning Messages

When a child who is a member of an Adoption Case is added to the Intake as an **Alleged Child Victim (ACV)/Child Subject of Report (CSR)**, warning messages will display on the Intake as a reminder when:

- The **Intake Type** and **Intake Category** selected cannot be linked to an Adoption Case.
- The ACVs/Child Subjects are not members of the same Adoption Case.

**Attention**  
This intake cannot be linked to an adoption case due to any of the following: 1) the intake category/type is not appropriate; 2) the intake was Screened in AR; 3) all ACVs/Child Subjects are not members of the same adoption case; or 4) the intake was Screened in prior to 01/01/2014.

To resolve the warning message(s), take the following action, as applicable:

1. Correct the **Intake Type** and/or the **Intake Category**.  
and/or
2. Ensure that all **ACVs/CSRs** on the Intake are children in the same Adoption Case. If ACVs/CSRs are members of different Adoption cases, they will require separate Intakes.

**Note:** An Intake should *always* be linked to the ACV/CSR's case.

## Linking an Intake to a Case

1. On the Ohio SACWIS **Home** screen, click the **Intake** tab.

The screenshot shows the Ohio SACWIS Home screen. The top navigation bar has tabs for Home, Intake (highlighted with a red circle), Case, Provider, Financial, and Administration. Below this is a sub-navigation bar with Alerts, Approvals, and Assignments. A message box displays an ODJFS message from 05/31/2017 11:59 AM regarding the state fiscal year cutoff for processing of SACWIS auxiliary payments. There are buttons for 'Add Message' and 'Manage Messages...'. Below the message box, it shows '0 Alerts Since 06/01/2017 03:55 PM'. There are filters for 'Last login' (1 day, 7 days, 14 days) and 'Sort By: Activity Date (Newest First)' with a 'Filter' button and a link to 'Show more filters...'. At the bottom, there is an 'Assignment' dropdown menu and the text 'No Alerts Found.'

## Linking Intakes to a Case

The **Intake Workload** screen appears.

2. Click the **link** hyperlink beside the Intake you wish to link to a case.

Home	Intake	Case	Provider	Financial	Administration
<b>Intake Workload</b>					
<a href="#">view link</a>		CA/N Report <a href="#">County Priority 1</a>	04/18/2017 1:56 PM	Screened In	04/27/2017 2:16 PM
<a href="#">view link</a>		CA/N Report <b>SPECIALIZED</b>	04/11/2017 8:22 AM	Screened In	04/20/2017 12:47 PM
<a href="#">view link</a>		CA/N Report <a href="#">County Priority 2</a>	11/03/2016 9:49 AM	Screened In AR	11/07/2016 2:22 PM

The **Link Case** screen appears.

**Attention**  
This intake cannot be linked to an adoption case due to any of the following: 1) the intake category/type is not appropriate; 2) the intake was Screened In AR; 3) all ACVs/Child Subjects are not members of the same adoption case; or 4) the intake was Screened In prior to 01/01/2014.

Link Case	Case ID	Case Name	Case Status	Case Category	Status Date	Agency
<a href="#">link</a>			Closed	Assess/Invest	02/06/1995	
<a href="#">link</a>			Closed	Ongoing	09/27/1991	
<a href="#">link</a>			Closed	Ongoing	05/26/2016	
<a href="#">link</a>			Open	Adoption	05/26/2016	

[Create Case](#) [Cancel](#)

The **Link Case** screen lists available cases to which the selected Intake ID can be linked, based on:

- Any existing cases in which one or more Intake Participants are Active or Historical members.

**Exception:** The **Warning Message** shown above will display when a particular Intake *cannot* be linked to the Adoption Case in which the Intake Participant(s) with a role of ACV/CSR or Child/Youth Subject of a Non-CA/N Report is a member.

## Linking Intakes to a Case

**Note:** If the case is an Adoption Case AND the Intake Category/Intake Type is one of the combinations listed below, the **Link Case** screen displays a row for the case but does *not* display the link hyperlink for the case:

CA/N Report	Baby Doe/Disabled Infant
Dependency Report	Dependent Child
Family In Need of Services	<p>One of the following:</p> <ul style="list-style-type: none"> <li>• Adoption Subsidy Only</li> <li>• Alt Response required Non Lead PCSA Contacts</li> <li>• Emancipated Youth</li> <li>• Home Evaluation/Visitation Assessment</li> <li>• ICAMA</li> <li>• ICPC</li> <li>• Permanent Surrender</li> <li>• Postnatal Placement Service to Infant of Incarcerated Mother</li> <li>• Post-Finalization Adoption Services</li> <li>• Preventative Services</li> <li>• Safe Haven/ Deserted Child</li> <li>• Unruly Delinquent</li> </ul>

The Adoption Case row is *not* displayed on the **Link Case** screen when:

- The Adoption Case is closed.
- The Case Category is (Open or Closed) Adoption Subsidy Only.
- The Intake has a Screening Decision Date/Time that is prior to the Adoption Case Creation Date.
- The Adoption Case Member's role in the Intake is not Alleged Child Victim, Child Subject of Report, or Child/Youth Subject of a Non-CA/N Report.

### Selecting from the Link Case Screen

From the **Link Case** screen, the user can:

- View the list of Active Case Members for a case to help determine the appropriate case to which to link the Intake
- Access the Case Overview to help determine the appropriate case to which to link the Intake
- Select a case to which to link the Intake
- Create a new Case, if appropriate, to link the Intake

## Linking Intakes to a Case

**Note:** You can click the **Plus Sign** next to the **Case ID** to view a list of Case Members (Active and Inactive).

The plus sign expands the entry and a list of **Case Members** appears.



The screenshot shows the 'Link Case' interface. At the top, there is a header bar with the title 'Link Case'. Below it is a table with columns: Case ID, Case Name, Case Status, Case Category, Status Date, and Agency. A row is highlighted in light blue, showing 'Closed' status and 'Ongoing' category. Below this table is another table with columns: Person ID, Person Name, DOB, Status, and Relationship to CRP. The 'Status' column contains a list of entries: 'Inactive', 'Active', 'Active', and 'Active'.

Once you have determined one of the listed cases on the **Link Case** screen is the correct case to which the Intake should be linked:

1. Click the **link** hyperlink beside the **Case ID** number to which you are linking the Intake.



This screenshot shows the 'Link Case' screen with a list of cases. The 'link' button next to the selected case ID is circled in red. Below the table, there are two buttons: 'Create Case' and 'Cancel'.

**Note:** The screen that appears will depend on the type of **Case** to which you are linking the Intake:

- The **Case Information** screen appears when linking to an existing *Non-Adoption Case*. *If the Case Information screen appears, refer to the **Linking an Intake to a Non-Adoption Case-The Case Information Screen View** section below.*
- The **Case Member Details** screen appears when linking to an Adoption Case. *If the Case Member Details screen appears, refer to the **Linking an Intake to an Adoption Case-The Case Members Details Screen View** section below.*

## Linking Intakes to a Case

**Note:** If there are no cases listed (or none of the listed cases on the **Link Case** screen is the correct case), click, **Create Case**.

### Creating a Case

Case ID	Case Name	Case Status	Case Category	Status Date	Agency
		Closed	Alternative Response Assessment	12/30/2016	

Person ID	Person Name	DOB	Status	Relationship to CRP
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The **Create Case** screen appears, displaying a list of Intake Participants who can be selected to become Case Members in the new case.

By default, each participant has a checkmark beside his or her name.

1. If any of the individuals listed should not be a Case Member, click the checkmark beside the appropriate **Person ID** to remove it from the checkbox. Removing the checkmark will prevent that particular person from being added to the case as a Case Member.
2. Click the name of the appropriate **Case Reference Person**.
3. Click, **Save**.

Select	Person ID	Person Name	DOB	Role
<input checked="" type="checkbox"/>				Parent
<input checked="" type="checkbox"/>				Alleged Child Victim (ACV)
<input checked="" type="checkbox"/>				Alleged Perpetrator (AP), Caretaker, Custodian, Parent

Case Reference Person: \*

Save Cancel

### Linking an Intake to a Non-Adoption Case-The Case Information Screen View

Linking an Intake to a Non-Adoption Case, as stated above, will cause the **Case Information** screen to appear once you have selected the Case from the Link Case screen.

## Linking Intakes to a Case

The **Case Information** screen is divided into four sections:

The **Case Information** section displays the basic case information such as the **Case Name**, **Case Status**, etc.

Case Information						
Case ID	Case Name	Case Status	Case Category	Status Date	Agency	
		Closed	Assess/Invest	04/14/2009		

The **Active Case Member** section displays the current Active Case Members.

Active Case Member				
Name	Person ID	DOB	Effective Date	Relationship to CRP
			08/18/2006	Case Reference Person
			03/11/2009	

The **Active Associated Persons** section displays any Active Associated Persons on the selected case.

Active Associated Persons					
Name	Person ID	DOB	Effective Date	Association	

The **Intake Participants** section displays the Participants for the Intake that the user is linking to the selected case.

Intake Participants			
	Name	Person ID	DOB
<input type="checkbox"/>			

### Selecting Intake Participants to Add to the Case

**Note:** 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 placing a checkmark(s) in the applicable checkbox(es).
2. Click, **Link to Existing Case**.

Intake Participants			
	Name	Person ID	DOB
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

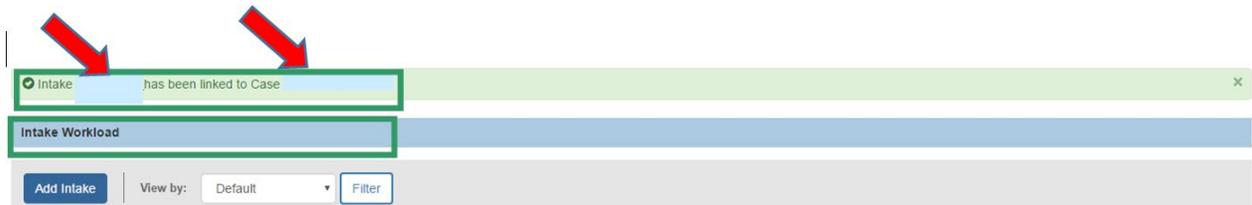
## Linking Intakes to a Case

**Important:** If the Intake is subsequently *unlinked* from the case, any Case Members who 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.

**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 **Intake Workload** screen appears with a message confirming the Intake has been linked to the Case.

**Note:** The Intake number is a hyperlink to the Intake. The Case number is a hyperlink to the Case Overview screen.



## Linking an Intake to an Adoption Case-The Case Member Details Screen View

Linking an Intake to an Adoption Case, as stated above, will cause the **Case Member Details** screen to appear once you have selected the Case from the Link Case screen.

### The Case Member Details Screen

The **Case Member Details** section displays basic case information including the **Case Name** and **Case Status**. It is divided into three sections.

Case Member Details						
Case ID	Case Name	Case Status	Case Category	Status Date	Agency	
[redacted]	[redacted]	Open	Adoption	[redacted]	[redacted]	

The **Adoption Members** section lists the current active Adoption Case Members.

Adoption Members			
Name	Person ID	DOB	Begin Date
[redacted]	[redacted]	[redacted]	05/26/2016

## Linking Intakes to a Case

The **Intake Participants** section lists the Participants for the Intake the user is linking to the selected case.

Intake Participants * (For Screened In CA/N or FINS Stranger Danger, Participants not connected to Adoption Case will become A/I Members)		
Name	Person ID	DOB

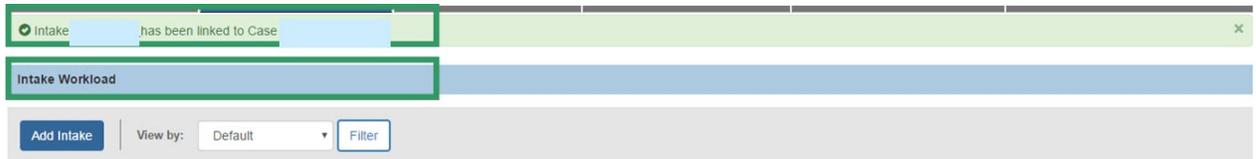
**Note:** When linking an Intake to an Adoption Case, the Intake Participants cannot be selected. Any Intake Participants, who are not already Adoption Case Members, automatically become A/I Members in the Adoption Case (if the Intake is a Screened In CA/N or FINS/Stranger Danger) so they may be linked to the applicable CAPMIS tools. For all other Intakes, no A/I Members will be created.

1. Click, **Link to Existing Case**.



**Important:** If it is determined that the Intake should *not* be linked to the case, click the **Cancel** button to return to the **Link Case** screen and select a different case.

The **Intake Workload** screen displays a message confirming the Intake has been linked to the case.



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).