

Using Search Functionality



Knowledge Base Article

Using Search Functionality

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Using Search Functionality

Overview

This article explains the process of using the following Search functionalities in SACWIS

- Person Search
- Intake Search
- Case Search
- Provider Search
- Employee Search

Note: All search screens have been streamlined, placing the most commonly used search criteria first.

Using the Name Match Precision Bar

When you perform a search in SACWIS, you will see a **Name Match Precision** bar at the bottom of the screen. The bar allows some control regarding the volume of search results. The bar defaults to the **AKA/Nicknames** search.

Note: The settings apply only to name fields, not other search criteria. The results default to **Sort by Relevance** based on the system match score. Users can select a different sort order from the **Sort by** drop-down menu, then click search again.

The text based searches score matches in the following way:

- 100% = First Name/Last Name exactly matches the search criteria
- 97.5% = AKA exact match
- 95% = Nickname match (equivalent nickname for search criteria matches)
- 90% = First/Last Name alternate spelling match (search criteria similarly spelled)
- 87.5% = AKA alternate spelling match (search criteria similarly spelled to AKA)
- 85% = First/Last Name phonetic match
- 82.5% = AKA phonetic match

The system averages these scores across all search fields to arrive at the “Relevancy” score for each potential match.

Using Search Functionality

A search using the default setting will return results matching entered names, including **AKA names/nicknames**.

The screenshot shows the search interface. At the top left, the text "Name Match Precision" is followed by a green-bordered box containing the text "Returns results matching entered names including AKA names/nicknames". To the right is a "Sort by:" dropdown menu set to "Relevance (Highest-Lowest)". Below this is a horizontal bar with a green gradient on the left and a gray box in the middle containing "+ AKA/Nicknames". The bar is flanked by "Fewer Results" on the left and "More Results" on the right. At the bottom left, there are two buttons: "Search" (circled in red) and "Clear Form".

The **Name Match Precision** bar can be set to return name variation results at 80% accuracy or 60% accuracy. If you wish to expand the volume of search results:

1. Click slightly to the right of the gray portion of the bar.

This screenshot is identical to the previous one, but with a red square box highlighting the right edge of the gray "+ AKA/Nicknames" portion of the search bar.

The text in the gray box now reads: **Name Variations 80%**. This search will return results matching entered names, including AKA names/nicknames and name variations with 80% matching precision.

2. Click, **Search**.

The screenshot shows the search interface after the second step. The green-bordered box now contains the text "Returns results matching entered names including AKA names/nicknames and name variations with 80% matching precision". The gray box in the search bar now contains "+ Name Variations 80%" and is circled in green. The "Search" button remains circled in red.

3. Click to the far right of the gray portion of the bar.

This screenshot is identical to the previous one, but with a red square box highlighting the far right edge of the gray "+ Name Variations 80%" portion of the search bar.

Using Search Functionality

The text in the gray box now reads: **Name Variations 60%**. This search will return results matching entered names, including AKA names/nicknames and name variations with 60% matching precision.

4. Click, **Search**.

The screenshot shows a search interface. At the top left, a dropdown menu titled "Name Match Precision" is open, showing the selected option: "Returns results matching entered names including AKA names/nicknames and name variations with 60% matching precision". Below this is a horizontal bar with a gradient from blue to red. On the left side of the bar, it says "Fewer Results". On the right side, it says "More Results". A gray button labeled "+ Name Variations 60%" is positioned over the red part of the bar. Below the bar are two buttons: "Search" (highlighted with a red circle) and "Clear Form". To the right of the bar is a "Sort by:" dropdown menu set to "Relevance (Highest-Lowest)".

Another search option is, **Exact Match**.

5. Click on the far left end of the bar.

The screenshot shows the same search interface as above, but the horizontal bar is now solid red. The "Exact Match" option is selected on the bar. The "Search" button is still highlighted with a red circle.

The text in the gray box now reads: **Exact Match**. This search will return results exactly matching entered terms.

6. Click, **Search**.

The screenshot shows the search interface with the "Name Match Precision" dropdown set to "Returns results exactly matching entered terms". The horizontal bar is now solid blue. The "Exact Match" option is selected on the bar. The "Search" button is highlighted with a red circle.

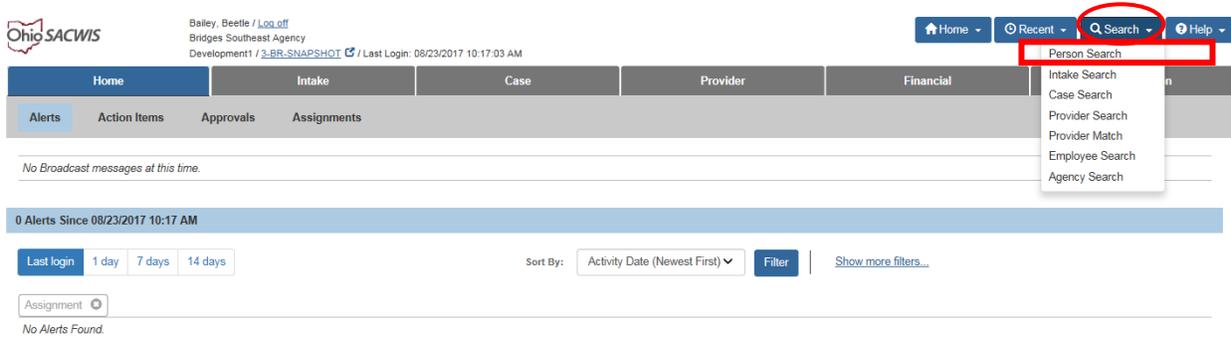
Performing a Person Search

Important: Merged person ID is no longer in the reference type field on the person search criteria page. Instead, if a search is conducted using a person ID that has been merged, the current person ID will automatically be returned in the search results with a merged badge. Merged person ID remains a reference type in the person record, it is just no longer needed as search criteria.

Using Search Functionality

From the SACWIS Home Page:

1. Click, **Search**.
2. Click, **Person Search**.



The **Search For Person** screen displays.

3. Enter search criteria.

Note: It is sometimes more advantageous to enter the entire name of a person, even if there is uncertainty about spelling; the system will recognize “sounds like” (phonetic) names. The system will also recognize common name variations, i.e., Bob, Bobby, Rob, Robert.

Important: A wildcard is automatically applied to the end of name fields. A wildcard means that the system will look for names that begin with the characters entered. For example, if you type “Johns” the system may also return “Johnson.” Do not enter a percent symbol (“%”) in any field, as the system no longer recognizes that as a wildcard.

Using Search Functionality

4. Click, Reference, TCN, and Address Criteria

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: 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

Additional search options become available.

- 5. Add the search parameters, as applicable.
- 6. Click, **Search**.

[Reference, TCN, and Address Criteria](#) ▴

Address Lookup:

Enter at least 8 characters to get address suggestions

Unit Name: Unit Number:

County: Authentication Number (TCN):

Reference Type:

Name Match Precision
Returns results matching entered names including AKA names/nicknames

Sort by: Relevance (Highest-Lowest) ▾

+ AKA/Nicknames

Fewer Results More Results

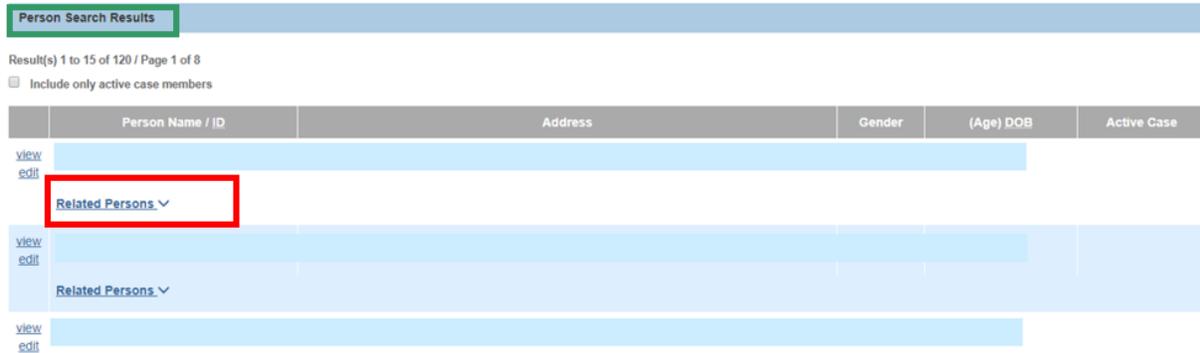
Using Search Functionality

The **Person Search Results** grid appears.

Note: The system can return up to 120 results. If there are many results, it may be necessary to refine your search criteria.

Each search result has a **Related Persons** link.

7. Click, the **Related Persons** link below the appropriate name.



A drop-down list of **Related Persons** appears.

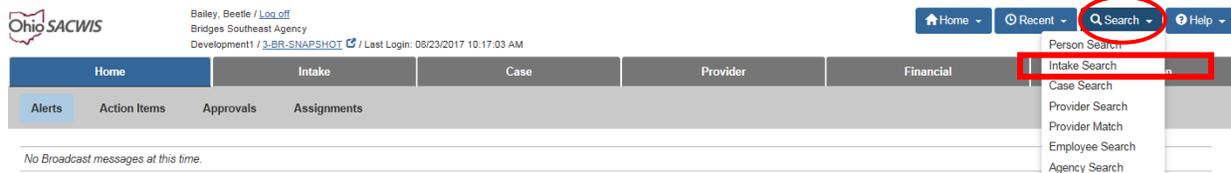
8. Click the name of any individual to retrieve the **Person Overview** screen.



Performing an Intake Search

From the SACWIS Home Screen:

1. Click, **Search**.
2. Click **Intake Search** from the drop-down menu.



Using Search Functionality

The **Search For Intake** screen appears.

3. Provide search criteria.
4. Click, **Case, Reporter, Participant and Address Criteria** for additional search options.
5. Enter additional search options, as applicable.
6. Click, **Search**.

Search For Intake

Intake ID:

Received Date/Time Range: -

From Date To Date

Intake Category: Intake Type:

Intake Status: Agency:

Screener Last Name:

Screener First Name:

[Case, Reporter, Participant and Address Criteria ^](#)

Case ID: - OR - Case Last Name:

Case First Name:

Decision Date/Time Range : -

From Date To Date

Name Match Precision
Returns results matching entered names including AKA names/nicknames

Sort By:

Fewer Results + AKA/Nicknames More Results

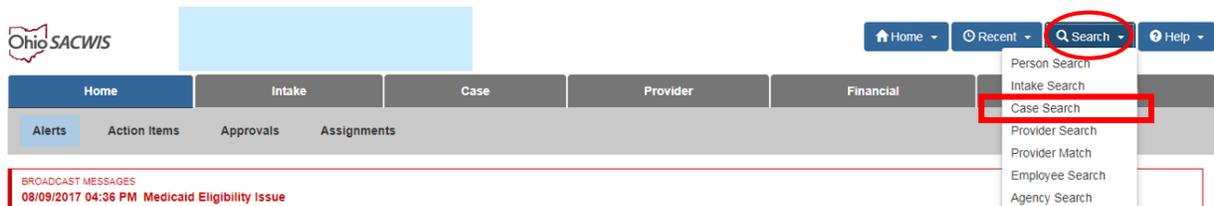
Using Search Functionality

Performing a Case Search

Important: Merged Case ID is no longer found in the reference type drop-down. Instead, if search is conducted using a merged case ID, the current case ID will automatically be returned in the search results, identified by a merged badge. Duplicate cases will be returned with a duplicate badge and on click, will navigate to the primary case.

From the SACWIS Home Page:

1. Click, **Search**.
2. Select **Case Search** from the drop-down menu.



The Search For Case screen appears.

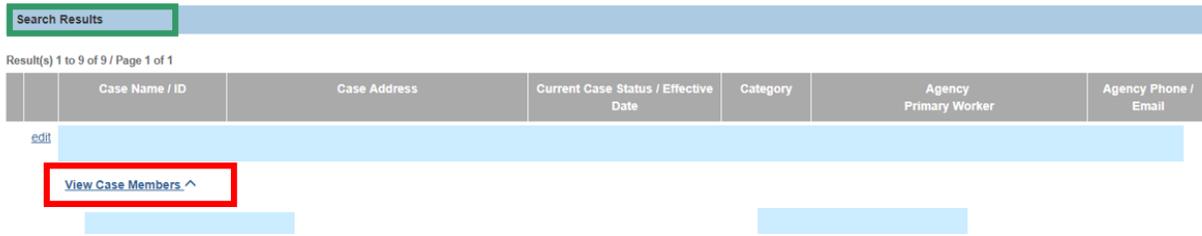
3. Complete the information.
4. Click, **Search**.

A screenshot of the 'Search For Case' screen. The form includes fields for Case ID, Case Last Name, Case First Name, Case Reference Type (dropdown), Worker Last Name, and Worker First Name. There are 'OR' and '~ OR ~' connectors between fields. A 'Name Match Precision' section explains that it returns results matching entered names including AKA names/nicknames. A 'Sort by' dropdown is set to 'Relevance (Highest-Lowest)'. At the bottom, there is a '+ AKA/Nicknames' button, 'Fewer Results' and 'More Results' links, and a 'Search' button circled in red next to a 'Clear Form' button.

Using Search Functionality

The **Search Results** grid appears.

5. Click, **View Case Members** to display the case members.



Performing a Provider Search

From the SACWIS Home Page:

1. Click, **Search**.
2. Click, **Provider Search**.



The **Search For Provider Profile** screen appears.

3. Enter search parameters.

The screenshot shows the 'Search For Provider Profile' form. The 'Provider ID' field and the 'Provider Name' field are highlighted with a red rectangular box. The 'Provider Name' field is split into 'Member Last Name', 'Member First Name', and 'Member Middle Name' sub-fields.

4. Click **Address, Contact and Provider Reference Criteria** for additional search options.
5. Enter additional information, as applicable.
6. Click, **Search**.

The screenshot shows the 'Search For Provider Profile' form with the 'Address, Contact and Provider Reference Criteria' dropdown menu open and highlighted with a red rectangular box. Below the dropdown, there are fields for 'Address Lookup', 'Unit Name', and 'Unit Number'. At the bottom, the 'Search' button is circled in red.

Using Search Functionality

The **Search Results** grid appears.

7. Click, **View Provider Type Information** to see what services are available from the listed Provider, as well as the Provider's status.

Search Results

Result(s) 1 to 15 of 139 / Page 1 of 10

	Provider Name / ID	Provider Status	Provider Category	Address
view edit		ACTIVE	NONODJFS	
View Provider Type Information ^				
Other / Type Status: Active		Effective Date: 12/08/2000		End Date:

Performing an Employee Search

From the SACWIS Home Page:

1. Click, **Search**.
2. Click, **Employee Search**.

Ohio SACWIS

Bailey, Beette / [Log off](#)
Bridges Southeast Agency
Development1 / [3-BB_SNAPSHOT](#) / Last Login: 08/23/2017 10:17:03 AM

Home Recent Search Help

Home Intake Case Provider Financial

Alerts Action Items Approvals Assignments

No Broadcast messages at this time.

Person Search
Intake Search
Case Search
Provider Search
Provider Match
Employee Search
Agency Search

The **Search For Employee** screen appears.

3. Enter the search parameters.
4. Click, **Search**.

Search For Employee

Employee ID: ~ OR ~ Last Name: First Name:

Middle Name:

County: Language Proficiency:

Education Level:

Include Inactive

Name Match Precision
Returns results matching entered names including AKA names/nicknames

Sort by: Relevance (Highest-Lowest)

Fewer Results More Results

Using Search Functionality

The **Search Results** grid appears.

Search Results						
Result(s) 1 to 1 of 1 / Page 1 of 1						
	Employee Name / ID	Email	Work Number	State / County	Supervisor	Unit
edit						
Managed Units:						

If you need additional assistance, please contact the SACWIS Help Desk.