

CREATING AND LINKING A YOUNG ADULT SERVICES INTAKE



Knowledge Base Article

Creating and Linking a Young Adult Services Intake

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Creating and Linking a Young Adult Services Intake

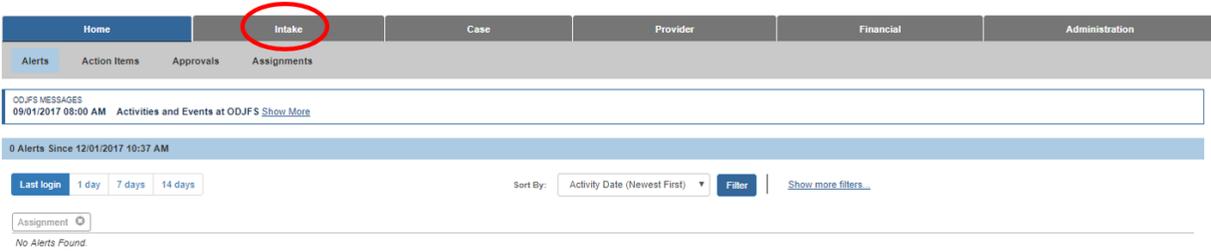
Overview

This article provides step-by-step instruction for completing and linking a Young Adult Services Intake.

Creating the Intake

From the SACWIS Home Screen:

1. Click the **Intake** tab.



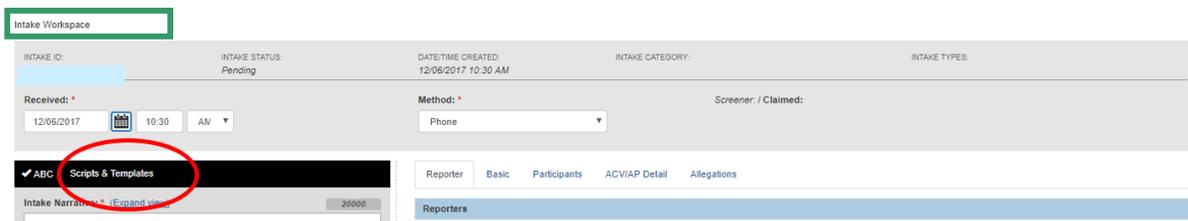
The **Intake Workload** screen appears.

2. Click **Add Intake**.



The **Intake Workspace** screen appears.

3. Click **Scripts & Templates**.

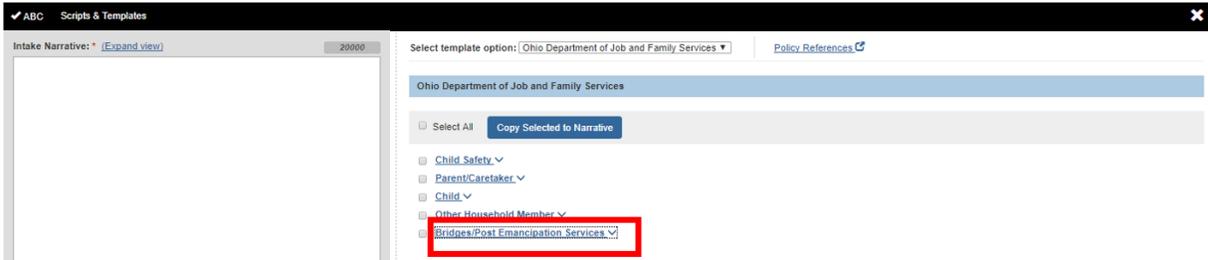


A list of narrative options appears.

Note: Each entry in the list of narratives is a link that can be expanded to reveal a list of guiding questions.

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4. Click the **Bridges/Post Emancipation Services** link.



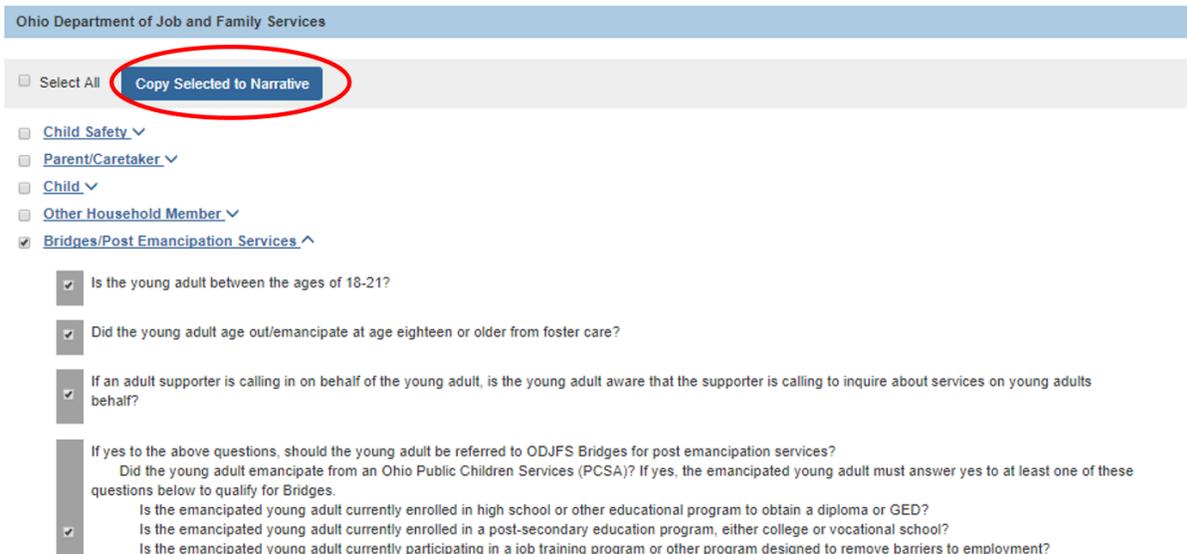
The link expands to show a list of guiding questions for the narrative related to a Post Emancipation intake.

Note: The narrative field is where the details about the referral/request for services should be documented. The narrative remains fully editable while the Intake is pending.

5. If desired, select a specific question(s) to copy into the narrative by placing a checkmark(s) in the checkbox(es) beside the question(s).

Note: If you place a checkmark in the checkbox beside **Bridges/Post Emancipation Services** (once you have expanded the link), all the narrative entries will be selected.

6. Click **Copy Selected to Narrative**.



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The questions you selected appear in the **Intake Narrative** grid.

7. Click **Apply**.

The screenshot shows the 'Intake Narrative' grid on the left, containing two questions: 'Is the young adult between the ages of 18-21?' and 'Did the young adult age out/emancipate at age eighteen or older from foster care?'. On the right, the 'Ohio Department of Job and Family Services' template is selected. Below the template name, there are several categories with checkboxes: 'Child Safety', 'Parent/Caretaker', 'Child', 'Other Household Member', and 'Bridges/Post Emancipation Services'. The first two questions are checked. At the bottom, the 'Intake Status' is set to 'Pending', and the 'Apply' button is circled in red.

The **Intake Workspace** screen appears on the Reporter tab view.

Completing the Reporter Tab

1. Click **Add Reporter**.

The screenshot shows the 'Intake Workspace' screen. At the top, a green notification bar says 'Your data has been saved.' Below this, intake details are displayed: 'INTAKE ID: [redacted]', 'INTAKE STATUS: Pending', 'DATE/TIME CREATED: 04/02/2018 10:01 AM', 'INTAKE CATEGORY: [redacted]', and 'INTAKE TYPES: [redacted]'. The 'Received' section shows '04/02/2018' at '10:01 AM' via 'Phone' method. The 'Reporter' tab is selected and circled in green. Below the tabs, the 'Reporters' section is empty, with the text 'No reporters have been added yet.' and an 'Add Reporter' button circled in red.

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The **Add Reporter** screen appears.

Note: The **Reporter Information** section will default to **Non-Mandated Reporter** (this is the correct selection when the reporter is an emancipated youth).

2. Click, **Search Person**.

Add Reporter

Current Narrative

Current Narrative (saved 1)

Reporter Information

Select the type of Reporter:

Non-Mandated Reporter

Mandated Reporter

Anonymous

Non-Mandated Reporter Information

Name: * **Search Person**

Person ID:

Gender:

Contact: Ext:

Other Contact:

Address:

Reporter Type:

Relationship to Alleged Child Victim(s) / Child Subject(s) of Report:

The **Search For Person** screen appears.

3. Enter the name of the Reporter, and any other available information.
4. Click **Search**.

Note: For more information on search functionality, please see the KBA, [Using Search Functionality](#).

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

Search **Clear Form** **Return**

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The results appear in the **Person Search Results** section.

5. Click **select**, beside the appropriate person's name.

The screenshot shows a table titled "Person Search Results" with columns: Person Name / ID, Address, Gender, (Age) DOB, and Active Case. Two rows are visible. The first row has a "select" link to its left. The second row has a "select" link circled in red. Below each row is a "Related Persons" dropdown menu.

The **Add Reporter** screen appears, displaying information about the selected reporter.

6. Select **Emancipated Young Adult**, from the **Reporter Type** drop-down menu, or other value if appropriate.
7. Enter the word "Self" in the text box titled: **Relationship to Alleged Child Victim(s)/Child Subject(s) of Report**, or record the relationship of the reporter to the Emancipated Young Adult if another person is making the referral.
8. Click **Save**.

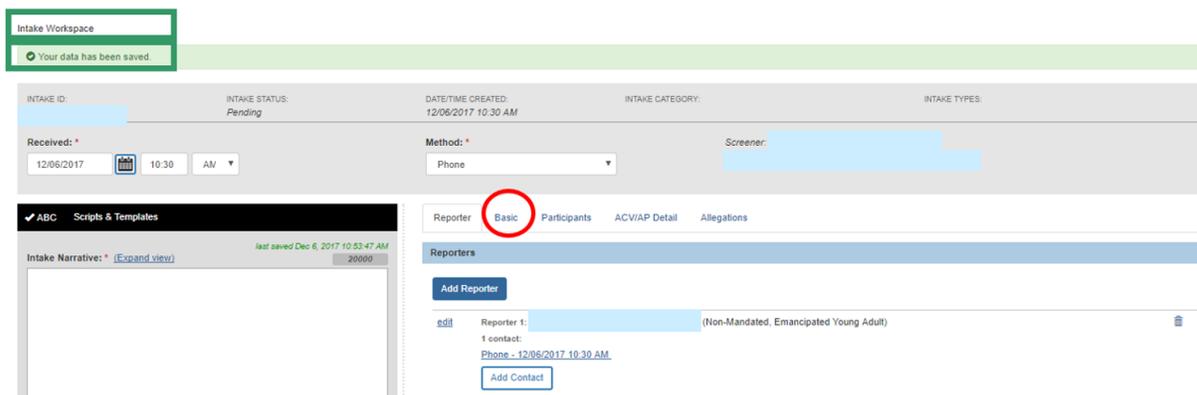
The screenshot shows the "Add Reporter" form. It includes sections for "Current Narrative", "Reporter Information", and "Non-Mandated Reporter Information". Under "Reporter Information", "Non-Mandated Reporter" is selected. In the "Non-Mandated Reporter Information" section, the "Reporter Type" dropdown is set to "Emancipated Young Adult" and the "Relationship to Alleged Child Victim(s) / Child Subject(s) of Report" text box contains "Self". Both are highlighted with red boxes. At the bottom, the "Save" button is circled in red.

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The **Intake Workspace** screen appears, displaying the message: **Your data has been saved.**

9. Click the **Basic** tab.

Note: Your changes will be saved as you navigate through the tabs.



The screenshot shows the 'Intake Workspace' interface. At the top, a green notification bar states 'Your data has been saved.' Below this, the intake details are displayed: INTAKE ID, INTAKE STATUS (Pending), DATE/TIME CREATED (12/06/2017 10:30 AM), INTAKE CATEGORY, and INTAKE TYPES. The 'Received' field shows '12/06/2017' at '10:30 AM'. The 'Method' is set to 'Phone'. The 'Basic' tab is highlighted with a red circle. Below the tabs, there is an 'Add Reporter' button and a list of reporters. The first reporter is '(Non-Mandated, Emancipated Young Adult)' with a contact phone number '12/06/2017 10:30 AM' and an 'Add Contact' button.

The **Basic** tab view appears.

Completing the Basic Tab

1. Select **Post Emancipation** from the **Intake Category** drop-down menu.
Note: Once you select Post Emancipation from the Intake Category, the tab titled, **ACV/AP Detail** and the tab titled, **Allegations**, disappear.
2. Select **Young Adult Services** from the **Intake Types** grid (this activates the **Add** button).
3. Click **Add** (this adds Young Adult Services to the **Selected Types** grid).
4. Complete the questions (required).

Note: Selecting a screening priority is optional.

Important: If you click the **Other Intake Designations** link, an expandable drawer will display with other available intake designations that may be applicable to the intake.

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Completing the Participants Tab

1. Click the **Participants** tab.

The screenshot shows the 'Intake Workspace' interface. At the top, there are fields for 'Intake ID', 'Intake Status' (Pending), 'Date/Time Created' (12/21/2017 11:01 AM), 'Intake Category' (Post Emancipation), and 'Intake Types'. Below this, there are fields for 'Received' (12/21/2017), 'Method' (Phone), and 'Screener'. The main content area is divided into two columns. The left column contains 'Intake Narratives' with a list of questions and checkboxes. The right column contains the 'Intake Type' section, which includes 'Intake Workload Name', 'Intake Category' (Post Emancipation), and 'Intake Types' (Young Adult Services). A 'Participants' tab is highlighted in the top navigation bar. At the bottom, there is a section for 'What is the screening priority of this report?' with radio buttons for 'None specified', 'LOW', 'MEDIUM', and 'HIGH'.

The **Participants** tab view appears.

Note: In the event the reporter entered is the Emancipated Young Adult, the system will automatically add the person to the participants page without the user having to conduct the search. For additional information regarding searches, please see the following Knowledge Base Article: [Using Search Functionality](#).

2. Click, **Search & Add Participants**.

The screenshot shows the 'Intake Workspace' interface with the 'Participants' tab selected. The 'Participants' section is highlighted in blue. Below the 'Participants' section, there is a 'Search & Add Participants' button and a 'Participant Roles' button. The 'Participants Relationships' section is also visible, showing 'No relationships exist'.

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The **Search & Add Participants** screen appears.

3. Fill in available information.
4. Click **Search**.

Search & Add Participants

Current Narrative

Current Narrative (saved 11/06/2017 09:21 am) ▾

Search & Add Participant

First Name:

Middle Name:

Last Name:

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

Fewer Results + AKA/Nicknames More Results

The results appear in the **Search Results** section.

Important: Any Young Adult who emancipated from an Ohio PCSA will have a record in SACWIS. If your search does not provide desired results, please follow the steps in the **Create New Person** section below.

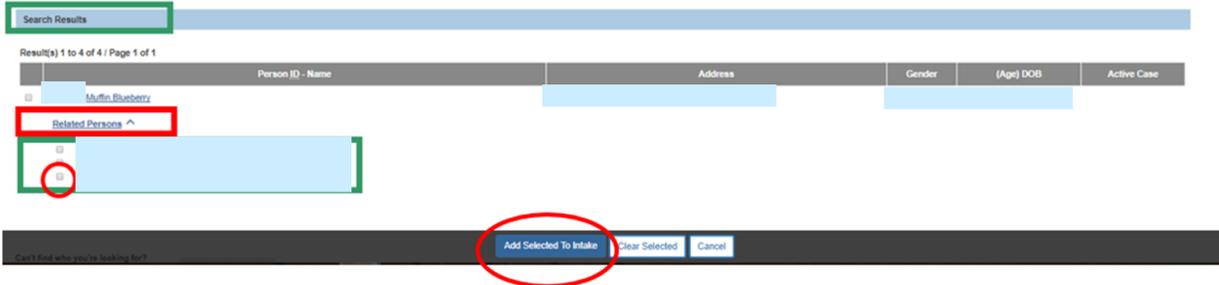
5. Place a checkmark in the checkbox next to the appropriate individual's name.

Note: If you click the **Related Persons** link, a list of persons related to the individual is displayed.

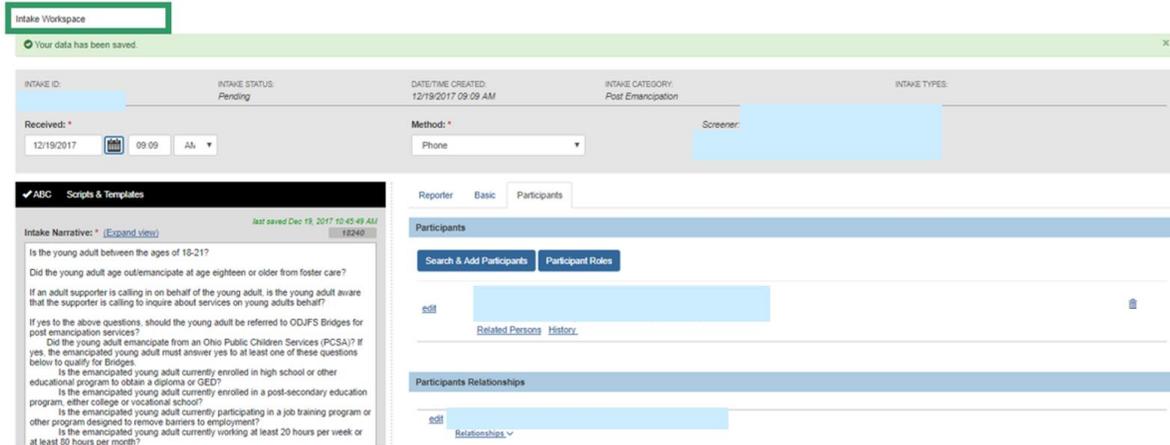
6. Click **Add Selected To Intake**.

Note: For further information on Searching, please see the following Knowledge Base Article: [Using Search Functionality](#).

Creating and Linking a Young Adult Services Intake



The **Intake Workspace** screen appears, displaying the added individual.



Creating a New Person

On the **Search & Add Participants** screen:

1. Click, **Create New Person**.



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The **Person Profile** screen appears, defaulted to the **Basic** tab.

2. Fill in any required information (denoted with a red asterisk) and any other available information under each heading.
3. Click **Save**.

The screenshot shows the 'Person Profile' form in the 'Basic' tab. The form is divided into several sections: 'Hazard/Alert Information' with checkboxes for Safety Hazard Exists, Safety Plan Exists, Environmental Hazard Exists, Protective Service Alert, AWOL, Pregnant, and Pregnant/Parenting Youth in Custody; 'Person Information' which is highlighted with a red border and contains fields for Prefix, First Name, Last Name, Middle Name, Suffix, Gender, DOB, Age, SSN, and Driver's License; and 'AKA Names' with a table for adding aliases. At the bottom, there are buttons for 'App', 'Save', and 'Cancel', with the 'Save' button circled in red.

The **Person Overview** screen appears, displaying the following message: **Your data has been saved.**

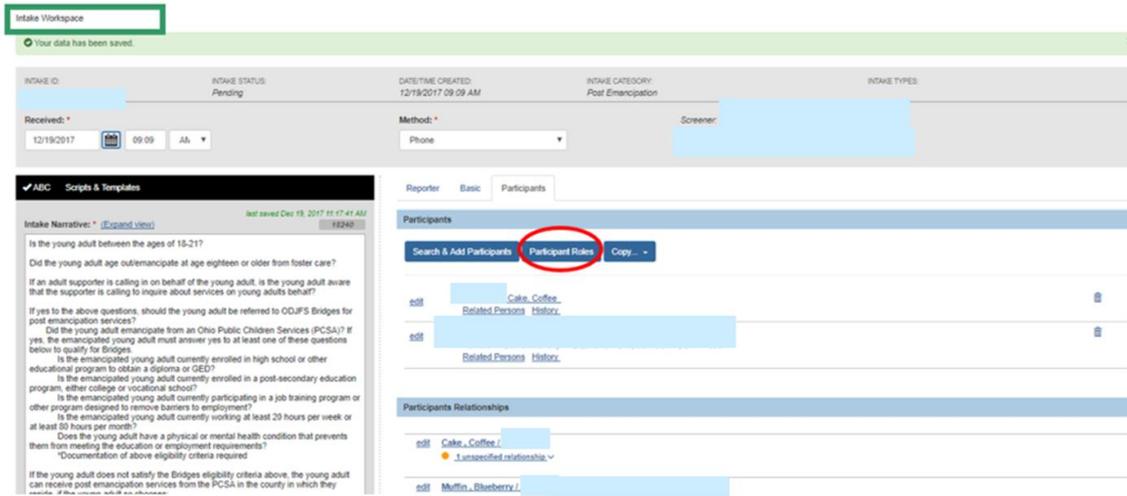
4. Click **Close**.

The screenshot shows the 'Person Overview' screen. A green notification bar at the top states 'Your data has been saved.' Below this, the 'Person Overview' section displays a summary of the person's information: Name (Coffee Cake), Person ID, Gender, DOB, Age, and Race (Hispanic/Latino). There is also a 'Primary Contact' section with fields for Contact and Address, and an 'Environmental Hazards' section. At the bottom, there is a 'Close' button circled in red.

Creating and Linking a Young Adult Services Intake

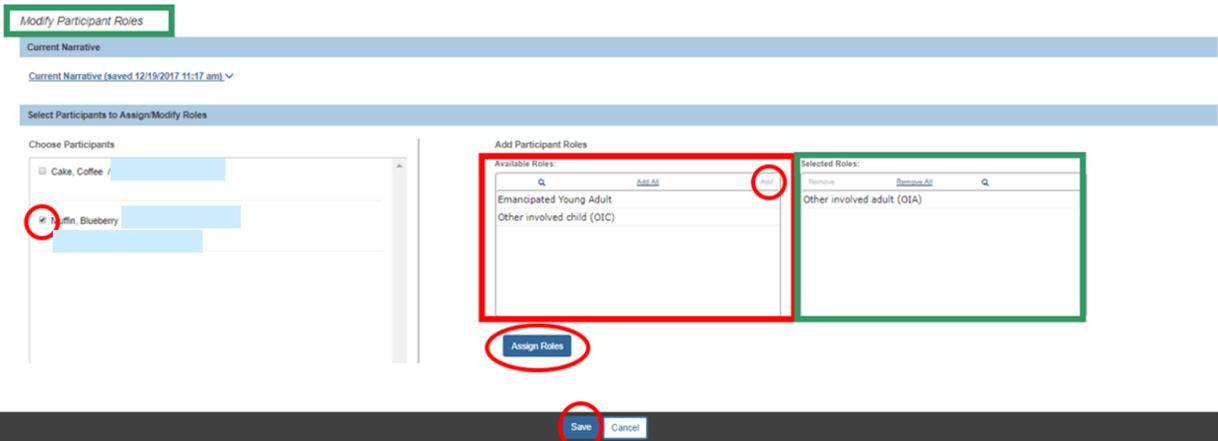
The **Intake Workspace** appears, displaying the added individual.

5. Click **Participant Roles**.



The **Modify Participant Roles** screen appears.

1. Place a checkmark in the box next to the appropriate name in the **Choose Participants** section.
2. Click on the appropriate selection from the **Available Roles** list (this will activate the **Add** button).
3. Click **Add**.
Note: When you click **Add**, the role you selected for the added participant is moved to the **Selected Roles** screen, and the **Assign Roles** button becomes active.
4. Click **Assign Roles**.
5. Click **Save**.



Creating and Linking a Young Adult Services Intake

The **Intake Workspace** screen appears, displaying the following message: **Your data has been saved.**

Important: If additional people are added to the intake as participants, then the relationships between all participants must be specified. When persons are selected, existing relationships will be automatically added. Any relationships that have not been specified in SACWIS will be denoted with an orange dot.

Resolving Unspecified Relationships

Once you add participants to the intake, any with unspecified relationships will be denoted with an orange dot.

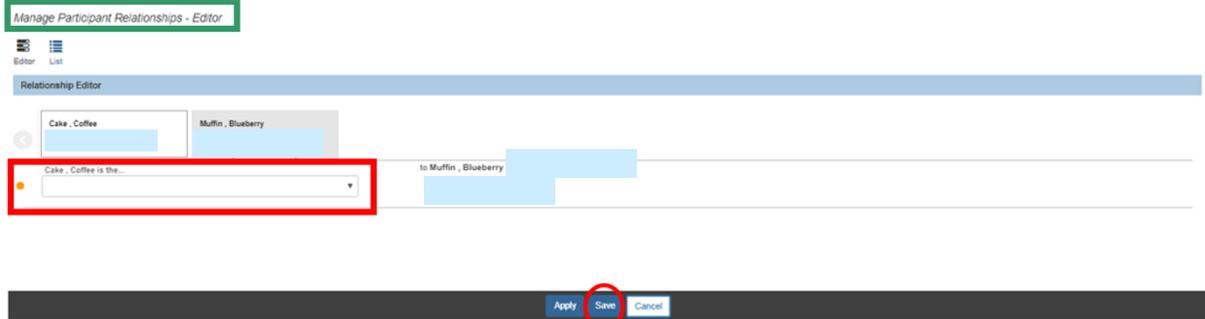
1. Click **edit** beside the name of an individual, in the **Participants Relationships** section.

The screenshot shows the 'Intake Workspace' interface. At the top, a green notification bar states 'Your data has been saved.' Below this, the intake details are displayed: Intake ID, Intake Status (Pending), Date/Time Created (12/19/2017 09:09 AM), Intake Category (Post Emancipation), and Intake Types. The 'Received' field shows '12/19/2017' and '09:09'. The 'Method' is 'Phone' and the 'Screener' is identified. The main content area is divided into three sections: 'Intake Narrative' with a list of questions, 'Participants' with a list of individuals (Cable, Coffee and Muffin, Blueberry) and buttons for 'Search & Add Participants', 'Participant Roles', and 'Copy...', and 'Participants Relationships' which shows a list of relationships between participants, with an orange dot indicating an unspecified relationship. At the bottom, there are 'Apply', 'Save', and 'Cancel' buttons.

Creating and Linking a Young Adult Services Intake

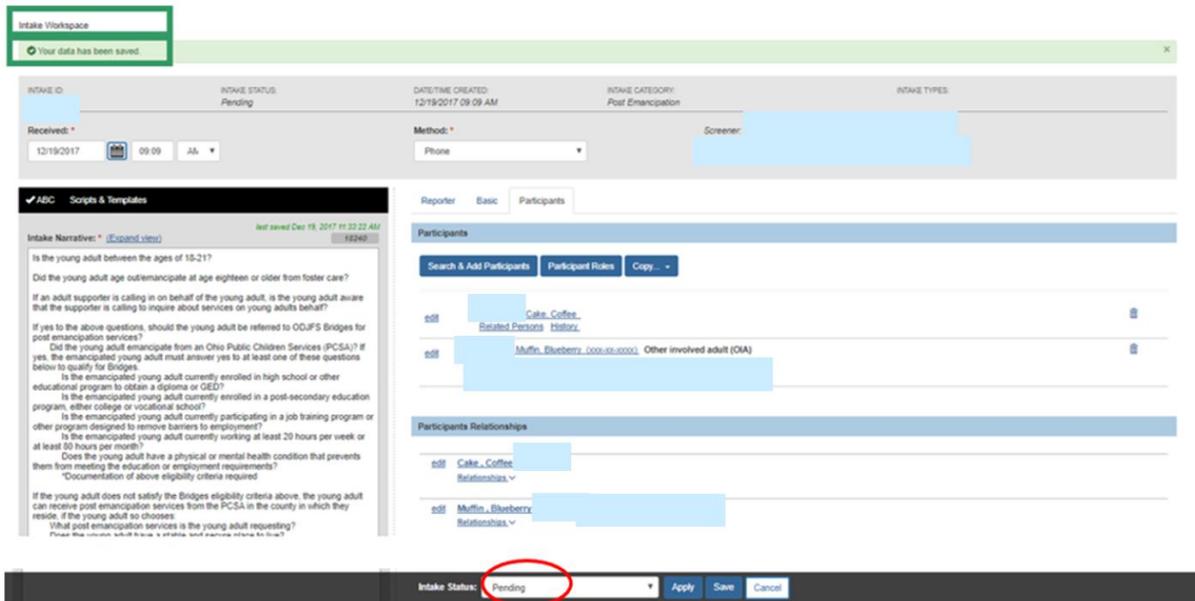
The **Manage Participant Relationships - Editor** screen appears.

2. Make a relationship selection from the drop-down menu.
3. Click **Save**.



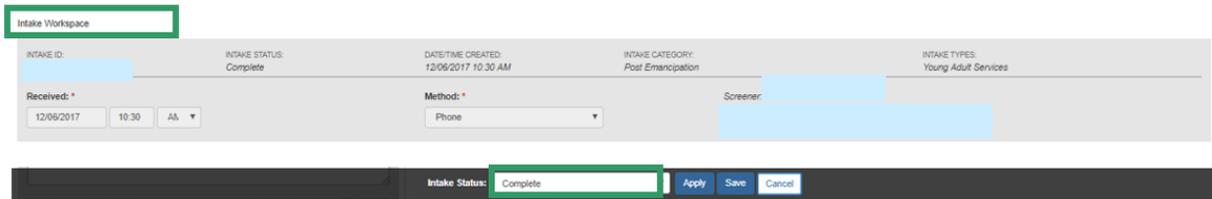
The **Intake Workspace** screen appears, displaying the following message: **Your data has been saved**. The orange dots no longer appear because the relationships have been recorded.

4. Select **Complete**, from the **Intake Status** drop-down menu.



Creating and Linking a Young Adult Services Intake

The **Intake Workspace** appears, displaying the **Complete** status.



The screenshot shows the 'Intake Workspace' interface. At the top, there is a header with the title 'Intake Workspace'. Below this, there is a form with several fields: 'INTAKE ID' (with a blue box), 'INTAKE STATUS' (set to 'Complete'), 'DATE/TIME CREATED' (12/06/2017 10:30 AM), 'INTAKE CATEGORY' (Post Emancipation), and 'INTAKE TYPES' (Young Adult Services). There are also fields for 'Received:' (12/06/2017, 10:30, AA) and 'Method:' (Phone). A 'Screener' field is also present. At the bottom, there is a dark bar with 'Intake Status: Complete' and buttons for 'Apply', 'Save', and 'Cancel'.

Important: If required information is incomplete, the Intake Status will remain as Pending, and a message similar to the one below in red will appear:



The screenshot shows the 'Intake Workspace' interface with a validation message. The message is in a red box and reads: '2 validation message(s) We found a few areas that need your attention:'. Below the message, there are two bullet points: 'All reporters not 'Anonymous' require a Reporter Type to mark the Intake as complete (Reporter).', and 'Please identify the relationship of all non-anonymous reporters to ACV/CSR or other child role (Reporter)'. Below the message, there is a header with the title 'Intake Workspace'. Below this, there is a form with several fields: 'INTAKE ID' (with a blue box and 'HIGH' in red), 'INTAKE STATUS' (set to 'Pending'), 'DATE/TIME CREATED' (with a blue box), 'INTAKE CATEGORY' (Post Emancipation), and 'INTAKE TYPES' (Bridges).

Note: The tab where information is missing is listed in parentheses.

5. Click on the appropriate tab (in this particular case, the **Reporter** tab) and enter the missing information.

If the required information is complete, the **Intake Workspace** screen appears showing a status of **Complete**.

6. Click **Save**.
7. **Important:** If you have screening decision maker security, the Decision tab will display and you can skip to the **Making a Decision** section. If you do not have screening decision maker security, you are finished with the Intake once you are returned to the Intake Workload. The intake will be picked up for a decision (by the screening decision maker) from the workload.

Creating and Linking a Young Adult Services Intake

Intake Workspace

INTAKE ID: HIGH INTAKE STATUS: Complete DATE/TIME CREATED: INTAKE CATEGORY: Post Emancipation INTAKE TYPES: Bridges

Received: * 03:09 PM Method: * Phone Screener: Rich, Richie / Claimed:

Intake Narrative: * (Expand view)

Is the young adult between the ages of 18-21?
Did the young adult age out/emancipate at age eighteen or older from foster care?
If an adult supporter is calling in on behalf of the young adult, is the young adult aware that the supporter is calling to inquire about services on young adults behalf?
If yes to the above questions, should the young adult be referred to ODJFS Bridges for post emancipation services?
Did the young adult emancipate from an Ohio Public Children Services (PCSA)? If yes, the emancipated young adult must answer yes to at least one of these questions below to qualify for Bridges.
Is the emancipated young adult currently enrolled in high school or other educational program to obtain a diploma or GED?
Is the emancipated young adult currently enrolled in a post-secondary education program, either college or vocational school?
Is the emancipated young adult currently participating in a job training program or other program designed to remove barriers to employment?
Is the emancipated young adult currently working at...

Participants

Emancipated Young Adult
History

Other Involved adult (OIA)
History

Participants Relationships

Intake Status: Complete Apply Save Cancel

The **Intake Workload** screen appears, displaying the intake.

Recording the Screening Decision

1. Click **decision**.

Intake Workload

Add Intake View by: Default Filter

Showing 15 intakes (Default view)

Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screener Name SDM Name	Status	Status Date/Time	
	LOW		Post Emancipation	12/06/2017 8:35 AM		Complete	12/06/2017 9:06 AM	

The **Intake Workspace** screen appears.

2. Make a selection from the drop-down menu under, **Is this an emergency?**

Note: Your selection to the above question will populate the **Response time for initiation**.

3. Make a selection from the drop-down menu under **Screening decision**.

Note: Based on your selection for the Screening decision, you will be prompted for further information specific to your choice.

4. When you have completed the information, click **Save**.

Creating and Linking a Young Adult Services Intake

Intake Workspace

INTAKE ID: LOW INTAKE STATUS: Complete DATE/TIME CREATED: 12/06/2017 08:35 AM INTAKE CATEGORY: Post Emancipation INTAKE TYPES: Young Adult Services

Received: 12/06/2017 08:35 AM Method: Phone Screener: [Redacted]

Scripts & Templates

Intake Narrative: [Expand view] last saved Dec 6, 2017 9:18:04 AM

Is the young adult between the ages of 18-21?
Did the young adult age out/emancipate at age eighteen or older from foster care?
If an adult supporter is calling in on behalf of the young adult, is the young adult aware that the supporter is calling to inquire about services on young adults behalf?
If yes to the above questions, should the young adult be referred to ODJFS Bridges for post emancipation services?

Reporter Basic Participants Decision

Decision Details

Is this an emergency? [Dropdown] Response time for initiation: [Field]

Screening decision: [Dropdown]

Apply Save Cancel

The **Decision Review** screen appears.

5. Click **Confirm Screening Decision**.

Decision Review

Intake Summary

Saving the Screening Decision will invoke 'Post-Screening Decision' edit rules.

You are about to decision this intake as: Screened In

Received Date/Time: 12/06/2017 08:35 AM Intake ID: [Redacted]

Decision Date/Time: 12/06/2017 09:30 AM Human Trafficking Allegation: No

Intake Category: Post Emancipation Child Fatality Status: N/A

Intake Types: Young Adult Services

Confirm Screening Decision Cancel

The **Intake Workload** screen appears, displaying the intake with a **Screened In** status.

Linking a Post-Emancipation Intake to a Case

1. Click the **link** hyperlink beside the appropriate **Intake ID**.

Important: If you click the **link** hyperlink and there is no appropriate Case to link the Intake, please see **Creating a Case** instruction below.

Intake Workload

Add Intake View by: Default Filter

Showing 3 intakes (Default view)

	Claimed By	Intake ID Screening Priority	Workload Name	Category	Date/Time Received	Screener Name SDM Name	Status	Status Date/Time	
view edit		[Redacted]					Pending	01/03/2018 10:33 AM	info
view link		[Redacted]		Post Emancipation	12/27/2017 3:29 PM		Screened In	12/28/2017 10:03 AM	info share

Creating and Linking a Young Adult Services Intake

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

Important: If the young adult already has an existing Bridges or Young Adult Services case (open or closed), it will appear in the case list on the **Link to Existing Case** screen. The existing Bridges or Young Adult Services case will have a link hyperlink. Other types of cases, in which the Emancipated Young Adult has been a member, will display on that page for information purposes, but will not be available to link. If there is no existing Bridges or Young Adult Services case, skip to **Creating a Case** instructions below.

2. Click the **link** hyperlink beside the existing Bridges or Young Adult Services case.

Link to Existing Case

Case(s)

Case Name / ID	Case Status	Case Category	Status Date	Agency
[Redacted]	Open	Ongoing	07/10/2017	[Redacted]
[Redacted]	Closed	Assess/Invest	06/07/2010	[Redacted]
[Redacted]	Open	Bridges	04/07/2017	[Redacted]

Each row includes a "Case Members" dropdown menu. The "link" hyperlink is circled in red next to the Bridges case.

The **Link to Existing Case** screen appears, displaying information regarding the existing case.

3. Click **Link To Existing Case**.

Link to Existing Case

CASE NAME / ID: [Redacted] **Bridges**
Open (04/07/2017)

AGENCY NAME: [Redacted]

Active Case Member(s)

Person Name / ID	Age, DOB	Effective Date	Relationship to CRP
[Redacted]	[Redacted]	04/07/2017	Case Reference Person
[Redacted]	[Redacted]	11/30/2017	

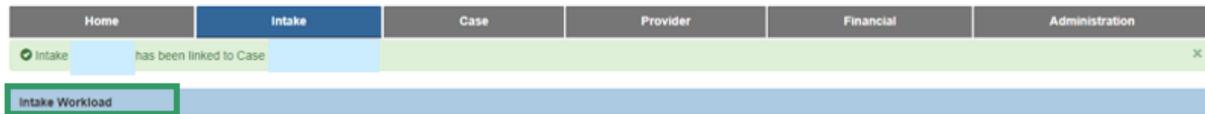
Active Associated Person(s)

Person Name / ID	Age, DOB	Effective Date	Association
[Redacted]	[Redacted]	12/01/2017	Child

Link To Existing Case Cancel

Creating and Linking a Young Adult Services Intake

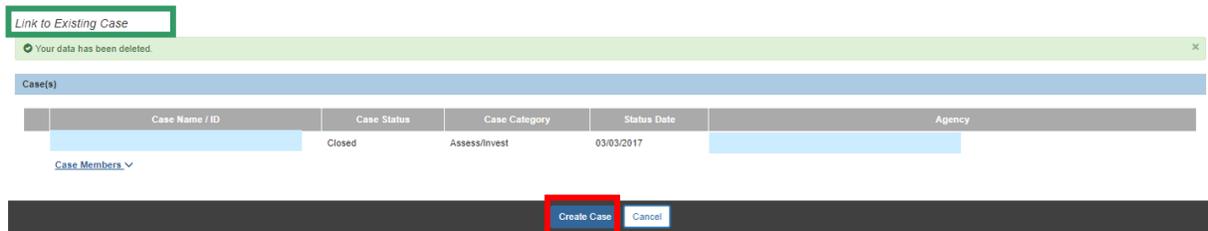
The **Intake Workload** screen appears, displaying the following message: **Intake #... has been linked to Case #...**



Creating a Case

On the **Link to Existing Case** screen:

1. Click, **Create Case**.

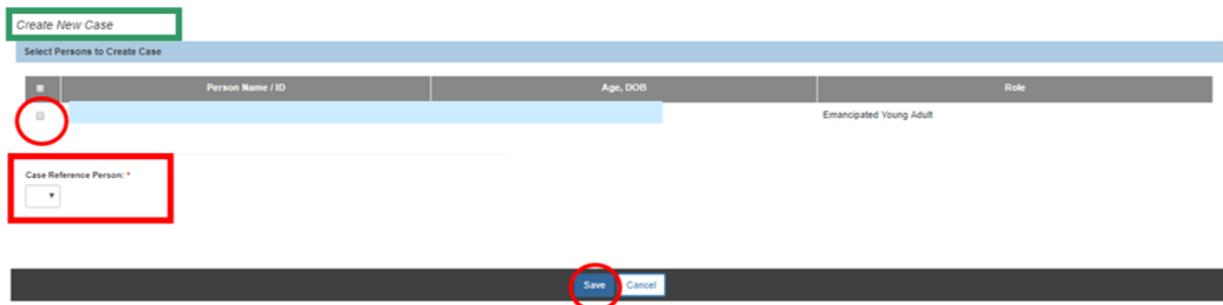


The **Create New Case** screen appears.

4. Place a checkmark in the checkbox beside the name of the appropriate individual(s) who should be members in the new case.

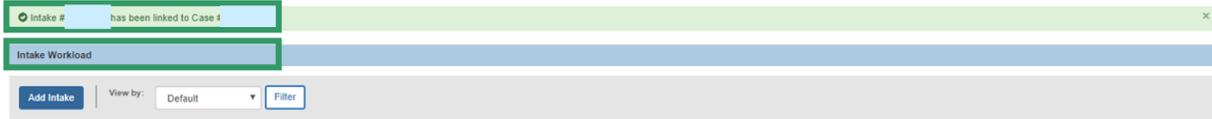
Note: SACWIS checks all intake participants by default; you will need to remove the unnecessary checkmarks.

5. Select the Emancipated Young Adult from the **Case Reference Person** drop-down menu.
6. Click **Save**.



Creating and Linking a Young Adult Services Intake

The **Intake Workload** screen appears, displaying a message that the intake has been linked to the new case.



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