

Closing a Bridges Case



Knowledge Base Article

Closing a Bridges Case

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Closing a Bridges Case

Overview

This article provides step-by-step instruction for closing a Bridges case.

Important: Prior to closing a Bridges case, please be certain of the following:

- There are no Activity Logs in “Draft” status.
- The Bridges Legal Custody Episode has been end-dated.
- The Housing Record has been end-dated
- Tier Level has been end-dated.

Important: An Activity Log for case closure must be completed prior to closing a case. Please see instructions below for completing an Activity Log.

From the Ohio SACWIS home screen:

1. Click the **Case** tab.
2. Click, **Workload**.
3. Click the name of the appropriate caseworker.

A list of cases appears.

4. Click the appropriate case number.

The screenshot shows the Ohio SACWIS Case Workload screen. The top navigation bar has tabs for Home, Intake, Case, Provider, Financial, and Administration. The 'Case' tab is selected. Below the navigation bar, there are sub-tabs for Workload and Court Calendar. The 'Workload' sub-tab is selected. The main content area shows a 'Case Workload' section with a dropdown for 'Caseworker' and a 'Sort By' dropdown set to 'Case Name Ascending'. A 'Filter' button is also present. Below this, a list of cases is displayed for 'Test, Worker' (28 cases). One case is visible: 'Sacwis, Susie' with case number '123456', status 'Open', date '05/04/2023', and type 'Bridges'.

The **Case Overview** screen appears.

Creating the Activity Log

1. Click, **Activity Log**, in the navigation pane.

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The **Activity Log** screen appears.

2. Click, **Add Activity**.

The **Activity Details** screen appears.

3. Make a selection from the list of **Available Contact Types** in the **Contact Types** grid (this will activate the **Add** feature).
4. Click, **Add** (this will place your selection in the **Select Contact Types** box).

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The screenshot shows the 'Contact Types' section of the Bridges Case Management System. It features two side-by-side panels: 'Available Contact Types' and 'Select Contact Types: *'. The 'Available Contact Types' panel contains a search bar, an 'Add All' button, and a list of contact types. 'Face-to-Face' is selected and highlighted in blue. A red box highlights the 'Add' button. The 'Select Contact Types: *' panel is currently empty.

5. Select **Bridges** from the **Case Category** drop-down menu in the **Category Information** grid.
6. From the **Category** drop-down menu, select **Case Closure**.
7. Select, **Case Closure Summary** from the list of **Available Sub Categories**.
8. Click, **Add**.

The screenshot shows the 'Category Information' section of the Bridges Case Management System. It features two side-by-side panels: 'Available Sub Categories' and 'Select Sub Categories: *'. The 'Available Sub Categories' panel contains a search bar, an 'Add All' button, and a list of sub-categories. 'Case Closure Summary' is selected and highlighted in blue. A red box highlights the 'Add' button. The 'Select Sub Categories: *' panel is currently empty.

9. From the top of the page, click the **Participants** tab.

The screenshot shows the 'Participants' tab selected in the Bridges Case Management System. The 'Activity Details' section is visible, showing the case name 'Sacwis, Susie / 123456' and the activity start date '07/22/2024'. The 'Participants' tab is highlighted in red.

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The **Participants** screen appears.

1. Make a selection from the available options under, **Contact Status**.
2. Click the **Narrative** tab.

Activity Details | Intake Info | **Participants** | Narrative

CASE NAME / ID: Sacwis, Susie / 123456 | Bridges / Open (05/04/2023)

Activity Log ID: 1234 | Activity Start Date: 07/22/2024

Choose Participants

Case Participants	Contact Status
Sacwis, Susie - 04/27/2005	<input checked="" type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed <input type="radio"/> In Regards To

The **Narrative** screen appears.

1. Enter text in the **Narrative** text box in the **Narrative Details** grid.
2. Select, **Completed** from the **Activity State** drop-down menu.

Important: Prior to selecting Completed, be certain to carefully review the record; once you have selected Completed, you will not be able to edit the Narrative.

3. Click, **Save**.

Associated Participants :
Sacwis, Susie

Narrative Information

To document quality face to face visits, please consider the following:

- Describe each child's current safety, risk, vulnerability, progress toward permanency goals, achievement of case plan goals and overall well-being.
- Describe each parent/caregiver/other adult's protective capacities, ability to meet the needs of the child(ren), progress toward permanency goals, achievement of case plan goals and overall well-being.
- Describe the household composition, observations of the home environment (including basic needs) and the current level of involvement of the non-custodial parent.

Narrative Details

Narrative: *
(expand full screen)

TEST

Spell Check 9996

Narrative History

Type	Date/Time Created	Created By	Agency
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Insert Correction | View Narrative

Activity State: * Completed

Apply | Save | Cancel | Delete | Move

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The **Activity Log** screen appears.

1. Select, **Case Closure**, from the navigation pane.

The screenshot shows the 'Activity Log' interface. On the left is a navigation pane with 'Case Closure' highlighted in red. The main area displays a case header for 'Bridges' (Case Name / ID: Sacwis, Susie / 123456; Open (05/04/2023)). Below this is the 'Activity Log Filter Criteria' section, which includes fields for 'Activity From Date', 'Activity To Date', 'Case Category', 'Contact Type', 'Category', 'Sub Category', 'Activity State', and 'Agency'. There is also an 'Advanced Search Criteria' section with 'Sort Results By' and 'Current Episode' radio button selected. At the bottom, there is an 'Activity Log' header.

The **Case Closure** screen appears.

Adding a Case Closure

1. Click, **Add Case Closure**.

The screenshot shows the 'Case Closure' interface. At the top, there are navigation tabs: 'Home', 'Intake', 'Case', 'Provider', 'Financial', and 'Administration'. Below these are 'Workload' and 'Court Calendar' buttons. The main area displays the case header for 'Bridges' (Case Name / ID: Sacwis, Susie / 123456; Open (05/04/2023)). Below this is the 'Case Closure(s)' section, which contains a red-bordered button labeled 'Add Case Closure'.

The **Case Closure** screen appears.

2. Make a selection from the **Case Closure Reason** drop-down menu.

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3. The **AI Checklist Completed** and the **Ongoing Closure Checklist Completed** responses will remain as **N/A**.
4. Click, **Validate for Approval**.

Case Closure Details

Agency	Bridges	Opened Date:	05/04/2023
Closed Date:		Closure Status:	
Created Date:		Created By:	
Modified Date:		Modified By:	

Available Case Closure Reasons:

<input type="text"/>	Add
No longer eligible for Young Adult Services	
ODJFS Discretionary Termination from Bridges	
Voluntary Withdrawal from Bridges/Young Adult Services	
Young Adult Died	
Young Adult Location Unknown	
Young Adult Services Provided	

Selected Case Closure Reasons: *

Remove	<input type="text"/>
No longer eligible for Bridges	

If Other Reason, Explain:

Primary Closure Reason: *

AI Checklist Completed: *

Ongoing Closure Checklist Completed: *

Case Closure Summary Information

Activity Date	Responsible Worker	Closure Summary Narrative
edit 07/22/2024		TEST unlink

Link Activity

Additional Comments:

2000

The **Case Closure Details** screen appears. If there are unresolved issues that would prevent the Bridges case from being closed, the **Unresolved Items for Closure** grid will appear (see graphic below), providing the location of the item(s) (**Location** tab), as well as the specifics of the issue(s) (**Message** tab). You will need to click the hyperlink(s) in the Location grid to resolve the issue(s).

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Case > Workload > Case Closure > Case Closure Details

CASE NAME / ID: Sacwis, Susie / 123456		Bridges / Open (05/04/2023)
Unresolved Items for Closure		
Location	Message	
Activity Log	All draft activity logs in the case must be resolved.	
Bridges Ongoing Eligibility	This Young Adult has an unapproved Bridges Ongoing Eligibility Record.	

If there are no unresolved issues, the Unresolved Items for Closure grid will still appear, but it will be empty. When there are no unresolved issues:

5. Click, **Close**.

Case > Workload > Case Closure > Case Closure Details

CASE NAME / ID: [REDACTED]		Bridges / Open (05/02/2018)
Unresolved Items for Closure		
Location	Message	

Close

The **Case Closure** screen appears.

Processing for Approval

1. Click, **Process for Approval**.

Case Closure Details			
Agency	Bridges	Opened Date:	05/04/2023
Closed Date:		Closure Status:	
Created Date:		Created By:	
Modified Date:		Modified By:	
Available Case Closure Reasons:		Selected Case Closure Reasons:	
<input type="text"/> Add		<input type="text"/> Remove	
No longer eligible for Young Adult Services		No longer eligible for Bridges	
ODJFS Discretionary Termination from Bridges			
Voluntary Withdrawal from Bridges/Young Adult Services			
Young Adult Died			
Young Adult Location Unknown			
Young Adult Services Provided			
If Other Reason, Explain: <input type="text"/>			
Primary Closure Reason: *	No longer eligible for Bridges		
All Checklist Completed: *	Yes		
Ongoing Closure Checklist Completed: *	Yes		
Case Closure Summary Information			
Activity Date	Responsible Worker	Closure Summary Narrative	
07/22/2024	TEST	unlink	
Link Activity			
Additional Comments: <input type="text"/>			
Spell Check	Clear	2000	
Validate for Approval	Process for Approval		
Save	Cancel		

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The **Process Approval** screen appears.

2. Make a selection from the **Action** drop-down menu. (supervisor can just final approve).
3. Make a selection from the **Reviewers/Approvers** drop-down menu.
4. Click, **Save**.

The screenshot displays the 'Process Approval' interface. At the top, a navigation bar includes 'Home', 'Intake', 'Case', 'Provider', 'Financial', and 'Administration'. Below this, a secondary bar shows 'Alerts', 'Action Items', 'Approvals', and 'Assignments', with 'Approvals' selected. The main content area is titled 'Process Approval' and contains a 'Work Item' section with fields for ID, Task ID, Type, Task Type, CASE, Case Closure, Reference, Task Reference, and Task Status. Below this is a 'Routing/Approval Action' section with an 'Action' dropdown menu (highlighted with a red box) and a 'Comments' text area. There are also 'Spell Check' and 'Clear' buttons. The 'Agency' and 'Reviewers/Approvers' dropdown menus are also present, with the latter highlighted by a red box. At the bottom left, a 'Save' button is circled in red.

If you have additional questions pertaining to this Deployment Communication, please contact the [Customer Care Center](#).