

**Knowledge Base Article** 

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#### **Overview**

**Important**: A Child Recruitment Plan can only be created in an Adoption Case (from the navigation pane), thus only adoption case members can have a recruitment plan. A new recruitment plan can be created only for active adoption case members.

An adoption case member can have only one non-end dated recruitment plan at a time. If the child has a non-end dated recruitment plan (regardless of status), the Select Child for the Add Recruitment plan drop-down menu will not display the child's name. Listed below are the four types of Status that exist for a CRP:

#### In Progress:

- Default status when a new child recruitment plan is created (system derived)
- ii. User can only record What is Planned narrative
- iii. System allows deletion of Activities added to current plan.
- iv. User has selected all planned activities to be included in child recruitment plan and each activity has narrative for What is Planned
- v. Child recruitment Plan can be deleted

#### Active:

- At least one activity needed to mark child recruitment plan active.
   Validation message: "At least one Activity is needed to mark the Child Recruitment Plan as Active"
- ii. Ability to record What was Completed narrative (user selected)
- iii. Cannot delete Current Activities
- iv. Ability to edit What was Planned narrative text (not historical narrative)
- v. What is Planned is required for each activity added to recruitment plan (to mark the plan as Active Status). Validation message: "What is Planned narrative is required for each added Activity to mark the Recruitment Plan as Active"
- vi. Can add additional activities (Add Selected Activities to Current Plan and Add Other Activity buttons remain enabled)
- vii. The Add Details narrative box for What is planned and What is completed for identified Activity is enabled
- viii. End date is enabled
- ix. Created in error is enabled (if not linked to any work item)
- x. Cannot change effective date

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xi. Cannot change status back to, In Progress; system will display only a Status of Active, Complete, and Close

#### Complete:

- i. User selected
- ii. All activities added to child recruitment plan must have at least one What is Completed narrative. Validation message: "All activities must have at least one What is Completed narrative to mark the Child Recruitment Plan as Complete"
- iii. Only end date is enabled

#### Closed:

- i. System derived when end date is recorded and saved
- ii. End date is required to mark status, Closed. Validation message: "End date is required to mark status Closed"
- iii. Option of Closed available only on Active and Complete Child recruitment plans
- iv. Not editable, except created in error rule below, and the State System Admin rules (Section 3 for business rules)

## From the Ohio SACWIS home page:

- 1. Click the **Case** tab.
- Click, Workload.
- 3. Click the case ID number of the appropriate adoption case.

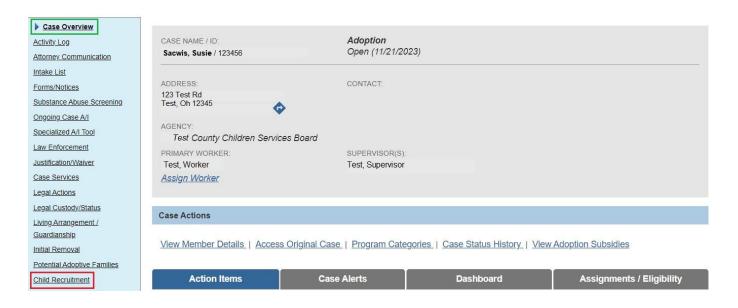


The **Case Overview** screen appears.

4. Click, **Child Recruitment**, in the navigation pane.

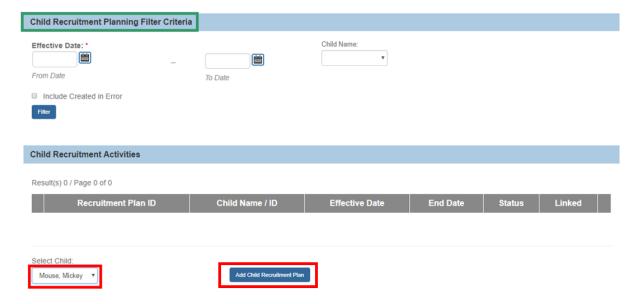
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#### The Child Recruitment Planning Filter Criteria screen appears.

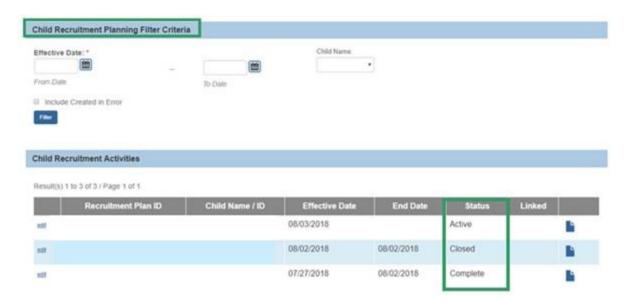
- 1. Select a child's name from the **Select Child** drop-down menu in **the Child Recruitment Activities** grid.
- 2. Click the Add Child Recruitment Plan button (the button becomes active when a child's name is selected).





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In the **Status** column of the **Child Recruitment Activities** grid, is a list of Child Recruitment Plans in various stages of completion.



Converted cases will also be listed in the **Child Recruitment Activities** grid, displaying a **CONVERTED** badge (see graphic below).

**Note**: The converted cases are display only and cannot be copied, deleted, or modified in any way.

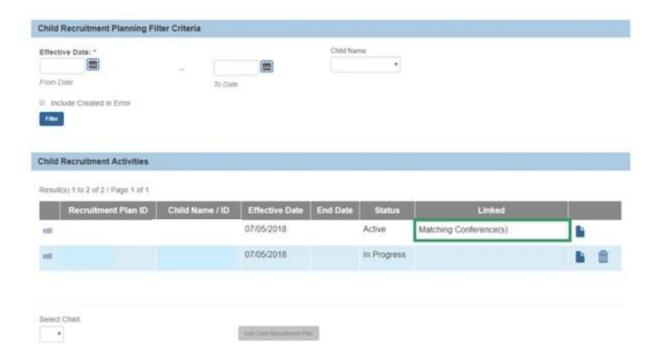




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The Linked column lets a user know whether or not a Child Recruitment Plan has been linked to a Matching Conference record or a Pre-Adoptive Staffing record. The graphic below shows the Child Recruitment Plan is linked to a **Matching Conference**.

**Note**: A Child Recruitment Plan can be linked to only one work item.



The **Manage Recruitment Plan** screen appears.

# **Adding Activities to the Recruitment Plan**

1. Enter a date in the Effective Date box.

**Note**: The Effective Date cannot be a future date. Additionally, the effective date cannot overlap an existing CRP.

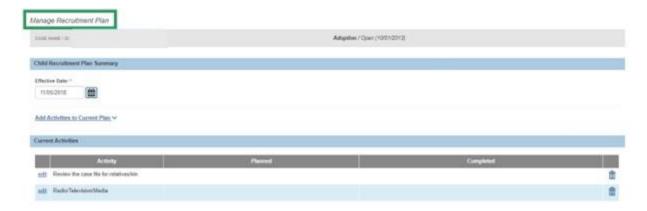
- Click the Add Activities to Current Plan link (the screen will expand, displaying) a pre-set list of recruitment activities).
- 3. Place a checkmark in the box beside each activity you want to add to the recruitment plan.
- 4. Click the, **Add Selected Activities To Current Plan** button.

**Note**: At least one activity is required to save the Child Recruitment Plan as Active.

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The **Manage Recruitment Plan** screen appears, displaying the added activities in the **Current Activities** grid.

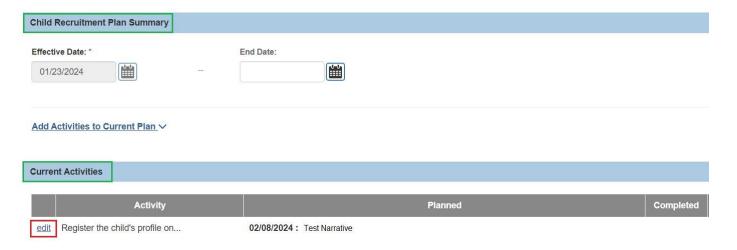


## **Managing the Recruitment Plan**

#### **Adding What is Planned Activities**

**Note: What is Planned**: These are activities the worker/team is planning to do, for example, make a call to a relative and attend an adoption fair.

1. Click, **edit** beside the appropriate activity.



#### The Maintain Activity screen appears.

2. Enter narrative in the What is Planned text box.

**Note**: You must click edit and enter What is Planned narrative for each activity you have listed in order to mark the Status as Active.

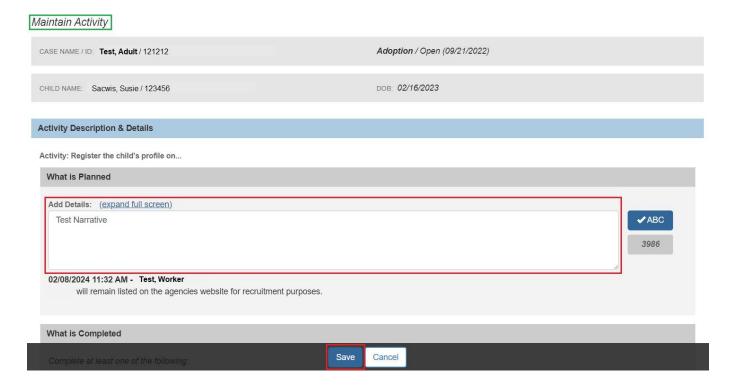
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**Note**: Even in Active status, the worker can continue to add narrative to What is Planned and What is Completed; additionally, the worker can choose to add another activity to the current plan.

3. Click, Save.



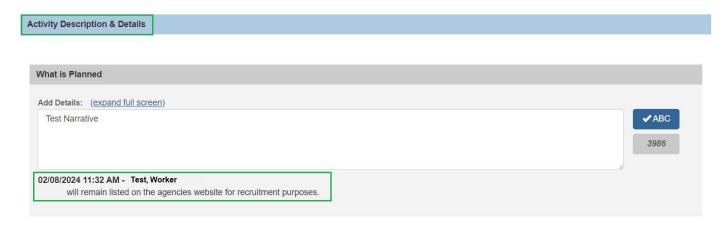
The **Manage Recruitment Plan** screen appears, displaying the added activity(ies).

4. Click, **edit**, beside an activity to display the date and time it was created, and the name of the user who created the activity.



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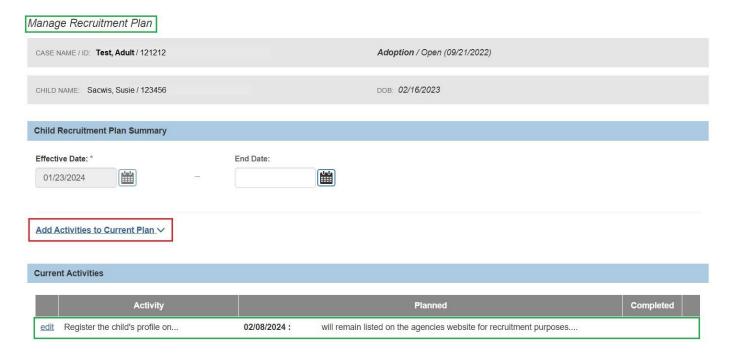
The **Maintain Activity** screen appears, displaying the date, time, and name of the person who added the activity.



## **Adding Other Activities**

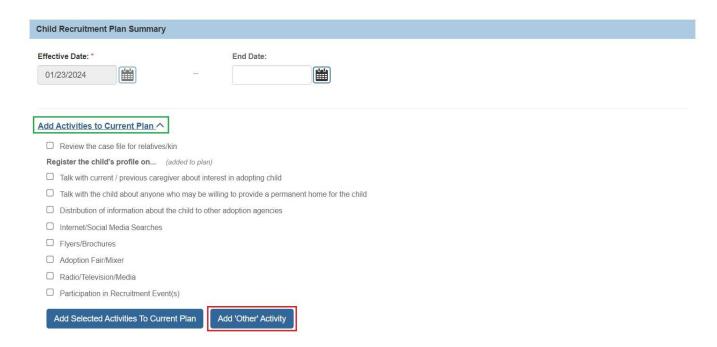
**Note**: Adding other activity(ies) is an optional feature; it is necessary if the worker/team will be doing a specific activity that is not part of the pre-set list of activities.

1. Click, Add Activities to Current Plan.



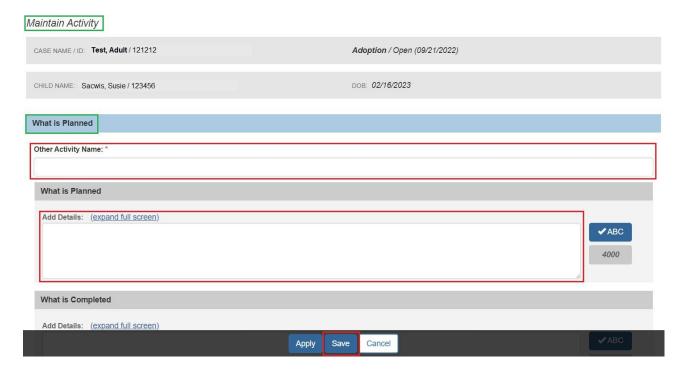
2. Select Add 'Other' Activity from the expanded list of activities.





#### The **Maintain Activity** screen appears.

- Enter the name of the activity in the Other Activity Name text box.
- 4. Enter narrative in the What is Planned grid.
- 5. Click, Save.



#### The Manage Recruitment Plan screen appears.

1. Select, Active, from the Status drop-down menu.



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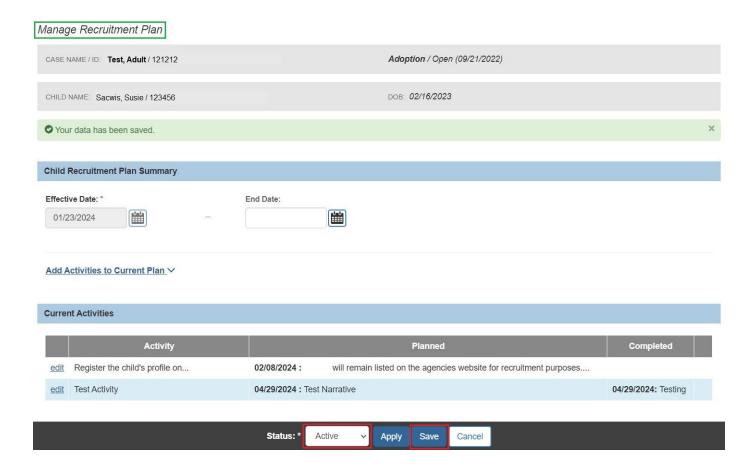
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**Note**: In order to mark a plan as Active, all activities added must have narrative in the What is Planned grid. While the CRP has a status of In Progress, Activities can be deleted.

**Note**: Once the plan is in Active status, additional activities can still be added.

2. Click, Save.

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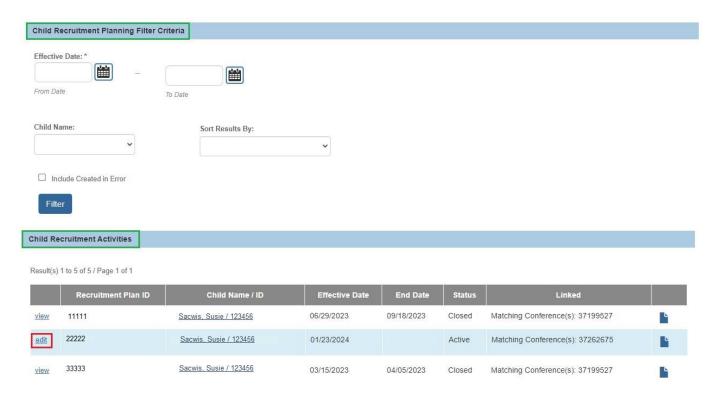


The Child Recruitment Planning Filter Criteria screen appears, displaying the Child Recruitment Plan with a Status of Active.

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#### **Adding Activities Completed**

1. Click, edit, beside the relevant ID in the Recruitment Plan ID column.



#### The **Maintain Activity** screen appears.

Enter narrative in the What is Completed text box.

**Note**: What is Completed: These are details of the actual work that was done by the worker/team; for example, the worker made a phone call to a family member on a specific date to talk about the child, or the worker attended a relevant fair and spoke with people about the child.

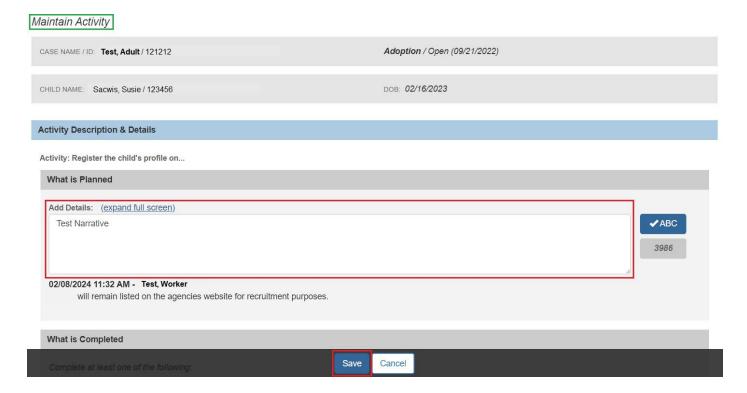
**Note**: Ohio SACWIS will keep a running, time-stamped log of all narrative. The log will include the name of the worker who completed the narrative.

3. Click, Save.

**Important**: You will need to click edit and enter What is Completed narrative for each activity listed in the Current Activities grid.

**Note**: It may be necessary to make selections from drop-down menus for the What is Completed grid (other than just narrative).

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#### The Manage Recruitment Plan screen appears.

**Note**: The Child Recruitment Plan can have an active status for 30-60 days. It is a running log of all the recruitment efforts the worker is doing to find a permanent home (via the Matching Conference record).

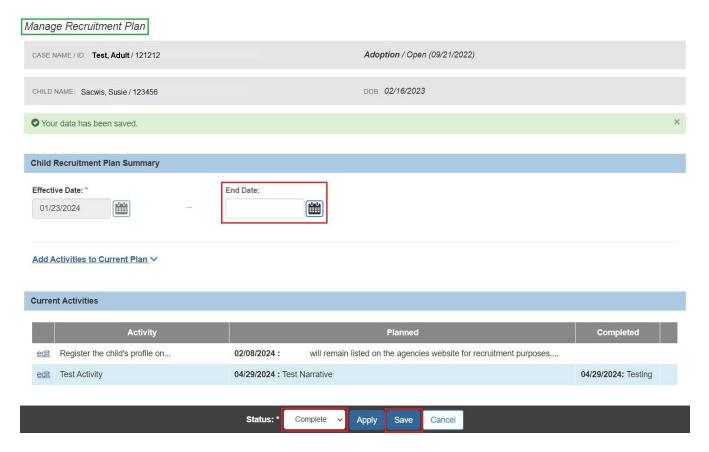
**Note**: Once the worker has documented everything they wanted to do and did do, then the plan should be marked as complete. Until the worker records the end date on a Completed plan, they can continue to add additional What is Completed narrative only.

- 1. Enter the End Date.
- 2. Select, **Complete**, from the **Status** drop-down menu.
- 3. Click, Save.

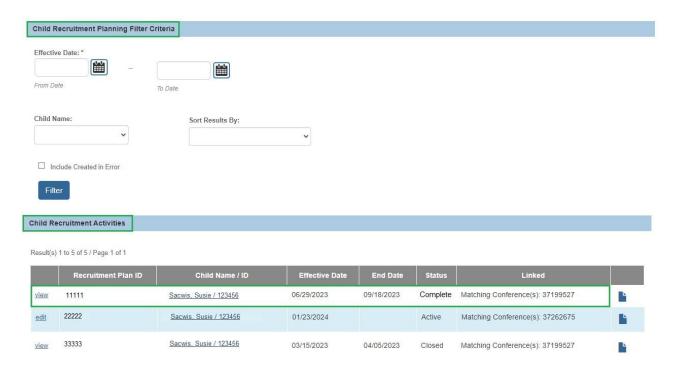
**Important**: If no families are identified or matched through the recruitment efforts of the worker, as documented in the Matching Conference record, then the worker MUST create/begin a NEW Child Recruitment Plan. The copy function can be used to create a new Child Recruitment Plan. This is the copy icon:







The Child Recruitment Planning Filter Criteria screen appears, displaying the Complete status.

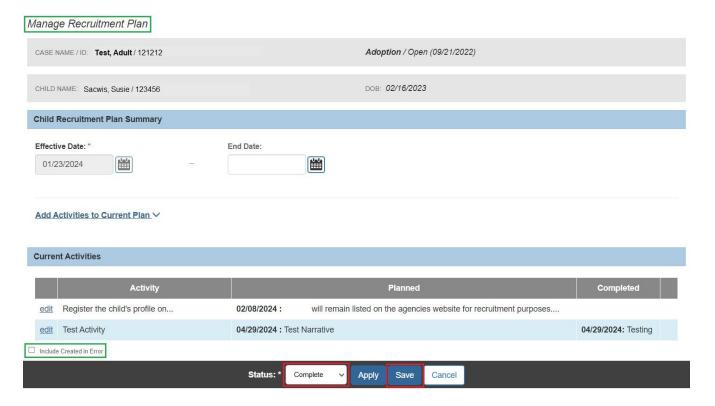




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**Note**: When the worker marks as complete with an end date, the system will change the status to Closed.

**Note**: If necessary, you can mark the record as created in error by placing a checkmark in the check box beside, **Created in error**. The worker can only mark the Child Recruitment Plan as created in error when the status is Active, Complete, or Closed and the plan is not linked to a matching conference record or a pre-adoptive staffing record.



The **Child Recruitment Planning Filter Criteria** screen appears.



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## **Generating a Child Recruitment Plan Report**

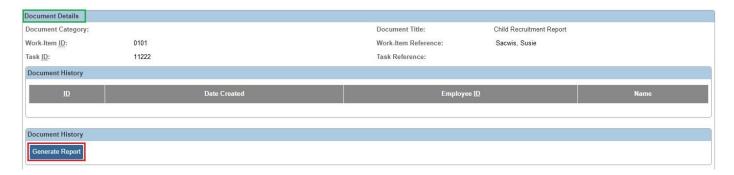
It is now possible to generate a Child Recruitment Plan report.

1. Click the report icon.



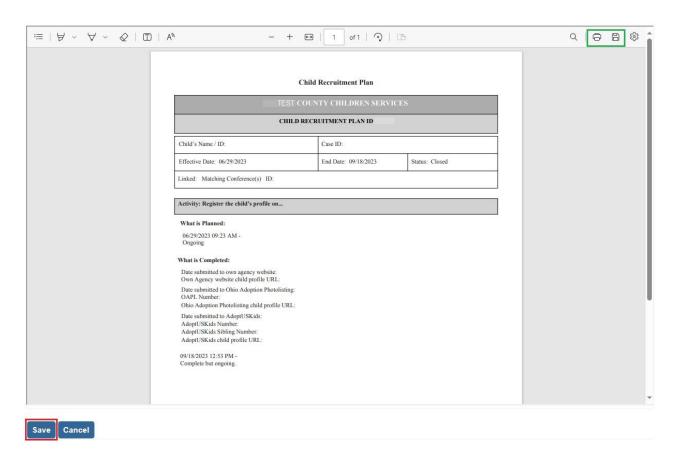
The **Document Details** screen appears.

2. Click, Generate Report.

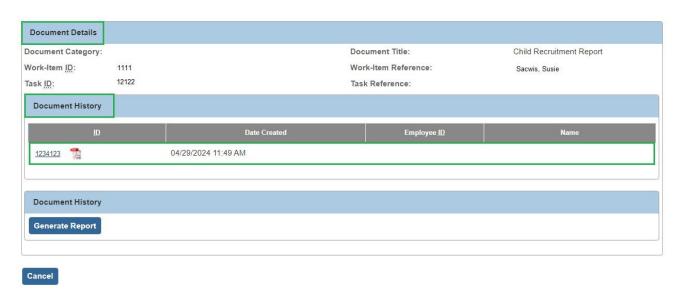


The **Child Recruitment Plan** report appears. You have the option to print or download this report.

3. Click, Save.



A copy of the report will appear in the **Document History** grid on the **Document** Details page.



If you have additional questions pertaining to this Deployment Communication, please contact the **Customer Care Center**.



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