

Creating a Child Recruitment Plan



Knowledge Base Article

Creating a Child Recruitment Plan

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Creating a Child Recruitment Plan

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:

- i. 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:

- i. 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

Creating a Child Recruitment Plan

- 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.
2. Click, **Workload**.
3. Click the case ID number of the appropriate adoption case.

The screenshot shows the Ohio SACWIS interface. At the top, there is a navigation bar with tabs: Home, Intake, Case, Provider, Financial, and Administration. The 'Case' tab is selected. Below this, there is a sub-navigation bar with 'Workload', 'Court Calendar', and 'Placement Requests'. The 'Workload' sub-tab is highlighted. The main content area is titled 'Case Workload'. It features a 'Caseworker:' dropdown menu and a 'Sort By:' dropdown menu set to 'Case Name Ascending', with a 'Filter' button. Below this, there is a list of cases under the heading 'Test, Worker (24 cases)'. The list contains two entries: 'Test, Child [121212] - Open 06/17/2022 - Ongoing' and 'Sacwis, Susie [123456] - Open 11/21/2023 - Adoption'. The second entry is highlighted with a red box.

The **Case Overview** screen appears.

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

Creating a Child Recruitment Plan

Case Overview

[Activity Log](#)
[Attorney Communication](#)
[Intake List](#)
[Forms/Notices](#)
[Substance Abuse Screening](#)
[Ongoing Case A/I](#)
[Specialized A/I Tool](#)
[Law Enforcement](#)
[Justification/Waiver](#)
[Case Services](#)
[Legal Actions](#)
[Legal Custody/Status](#)
[Living Arrangement / Guardianship](#)
[Initial Removal](#)
[Potential Adoptive Families](#)

Child Recruitment

CASE NAME / ID:

Sacwis, Susie / 123456

Adoption

Open (11/21/2023)

ADDRESS:

123 Test Rd
Test, Oh 12345

CONTACT:

AGENCY:

Test County Children Services Board

PRIMARY WORKER:

Test, Worker

SUPERVISOR(S):

Test, Supervisor

[Assign Worker](#)

Case Actions

[View Member Details](#) | [Access Original Case](#) | [Program Categories](#) | [Case Status History](#) | [View Adoption Subsidies](#)

Action Items

Case Alerts

Dashboard

Assignments / Eligibility

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).

Child Recruitment Planning Filter Criteria

Effective Date: *

From Date

To Date

Child Name:

☐ Include Created in Error

Filter

Child Recruitment Activities

Result(s) 0 / Page 0 of 0

Recruitment Plan ID	Child Name / ID	Effective Date	End Date	Status	Linked
<div>Select Child:</div> <div> <div>Mouse, Mickey</div> <div>Add Child Recruitment Plan</div> </div>					

Creating a Child Recruitment Plan

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

Child Recruitment Planning Filter Criteria

Effective Date: *

From Date To Date

☐ Include Created in Error

Child Recruitment Activities

Result(s) 1 to 3 of 3 / Page 1 of 1

	Recruitment Plan ID	Child Name / ID	Effective Date	End Date	Status	Linked	
sdf			08/03/2018		Active		
sdf			08/02/2018	08/02/2018	Closed		
sdf			07/27/2018	08/02/2018	Complete		

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.

Child Recruitment Activities

Result(s) 1 to 5 of 5 / Page 1 of 1

	Recruitment Plan ID	Child Name / ID	Effective Date	End Date	Status	Linked	
view	121212	Sacwis, Susie 123456	03/30/2007	10/16/2018	Closed		
view	131313	Duck, Daffy	03/30/2007	10/16/2018	Closed		
view		Duck, Daffy	03/30/2007	10/16/2018	Closed		
view		Duck, Daffy	03/30/2007	10/16/2018	Closed		
view		Duck, Daffy	03/30/2007	10/16/2018	Closed		

Creating a Child Recruitment Plan

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 screenshot displays the 'Child Recruitment Planning Filter Criteria' section with fields for 'Effective Date' (From Date and To Date), 'Child Name', and a checkbox for 'Include Created in Error'. Below this is a 'Filter' button. The 'Child Recruitment Activities' section shows 'Result(s) 1 to 2 of 2 / Page 1 of 1'. A table lists two activities:

Recruitment Plan ID	Child Name / ID	Effective Date	End Date	Status	Linked
111		07/05/2018		Active	Matching Conference(s)
111		07/05/2018		In Progress	

Below the table is a 'Select Child' dropdown and an 'Add Child Recruitment Plan' button.

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.

2. 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.

Creating a Child Recruitment Plan

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

Manage Recruitment Plan

Child Recruitment Plan Summary

Effective Date: 11/15/2018

Add Activities to Current Plan

Current Activities

Activity	Planned	Completed
edit Review the case file for relatives/kin		
edit Radio/Television/Media		

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.

Child Recruitment Plan Summary

Effective Date: 01/23/2024

End Date:

Add Activities to Current Plan

Current Activities

Activity	Planned	Completed
edit Register the child's profile on...	02/08/2024 : Test Narrative	

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.

Creating a Child Recruitment Plan

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**.

Maintain Activity

CASE NAME / ID: **Test, Adult / 121212**

Adoption / Open (09/21/2022)

CHILD NAME: **Sacwis, Susie / 123456**

DOB: **02/16/2023**

Activity Description & Details

Activity: Register the child's profile on...

What is Planned

Add Details: [\(expand full screen\)](#)

Test Narrative

02/08/2024 11:32 AM - **Test, Worker**
will remain listed on the agencies website for recruitment purposes.

✓ ABC
3986

What is Completed

Complete at least one of the following:

Save Cancel

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.

Manage Recruitment Plan

Child Recruitment Plan Summary

Effective Date: 11/05/2018

Add Activities to Current Plan

Current Activities

	Activity	Planned	Completed
edit	Review the case file for relatives/kin	11/05/2018 : Test Narrative	
edit	Radio/Television/Media	11/05/2018 : Test Narrative	

Creating a Child Recruitment Plan

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

Activity Description & Details

What is Planned

Add Details: [\(expand full screen\)](#)

Test Narrative

✓ ABC

3986

02/08/2024 11:32 AM - Test, Worker

will remain listed on the agencies website for recruitment purposes.

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**.

Manage Recruitment Plan

CASE NAME / ID: Test, Adult / 121212

Adoption / Open (09/21/2022)

CHILD NAME: Sacwis, Susie / 123456

DOB: 02/16/2023

Child Recruitment Plan Summary

Effective Date: *

01/23/2024



End Date:



[Add Activities to Current Plan](#) ▼

Current Activities

	Activity	Planned	Completed
edit	Register the child's profile on...	02/08/2024 : will remain listed on the agencies website for recruitment purposes....	

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

Creating a Child Recruitment Plan

Child Recruitment Plan Summary

Effective Date: *

01/23/2024



End Date:



Add Activities to Current Plan ^

☐ Review the case file for relatives/kin

Register the child's profile on... (added to plan)

☐ Talk with current / previous caregiver about interest in adopting child

☐ Talk with the child about anyone who may be willing to provide a permanent home for the child

☐ Distribution of information about the child to other adoption agencies

☐ Internet/Social Media Searches

☐ Flyers/Brochures

☐ Adoption Fair/Mixer

☐ Radio/Television/Media

☐ Participation in Recruitment Event(s)

Add Selected Activities To Current Plan

Add 'Other' Activity

The **Maintain Activity** screen appears.

3. 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**.

Maintain Activity

CASE NAME / ID: **Test, Adult / 121212**

Adoption / Open (09/21/2022)

CHILD NAME: **Sacwis, Susie / 123456**

DOB: **02/16/2023**

What is Planned

Other Activity Name: *

What is Planned

Add Details: (expand full screen)

✓ ABC

4000

What is Completed

Add Details: (expand full screen)

Apply

Save

Cancel

✓ ABC

The **Manage Recruitment Plan** screen appears.

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

Creating a Child Recruitment Plan

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**.

Manage Recruitment Plan

CASE NAME / ID: **Test, Adult / 121212**

Adoption / Open (09/21/2022)

CHILD NAME: **Sacwis, Susie / 123456**

DOB: **02/16/2023**

✔ Your data has been saved.

Child Recruitment Plan Summary

Effective Date: *

01/23/2024



End Date:



[Add Activities to Current Plan](#) ▼

Current Activities

	Activity	Planned	Completed
edit	Register the child's profile on...	02/08/2024 : will remain listed on the agencies website for recruitment purposes....	
edit	Test Activity	04/29/2024 : Test Narrative	04/29/2024: Testing

Status: * **Active** ▼ **Apply** **Save** Cancel

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

Creating a Child Recruitment Plan

Adding Activities Completed

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

Child Recruitment Planning Filter Criteria

Effective Date: *
 -
From Date To Date

Child Name: Sort Results By:

☐ Include Created in Error

Filter

Child Recruitment Activities

Result(s) 1 to 5 of 5 / Page 1 of 1

	Recruitment Plan ID	Child Name / ID	Effective Date	End Date	Status	Linked	
view	11111	Sacwis, Susie / 123456	06/29/2023	09/18/2023	Closed	Matching Conference(s): 37199527	
edit	22222	Sacwis, Susie / 123456	01/23/2024		Active	Matching Conference(s): 37262675	
view	33333	Sacwis, Susie / 123456	03/15/2023	04/05/2023	Closed	Matching Conference(s): 37199527	

The **Maintain Activity** screen appears.

2. 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).

Creating a Child Recruitment Plan

Maintain Activity

CASE NAME / ID: Test, Adult / 121212	Adoption / Open (09/21/2022)
CHILD NAME: Sacwis, Susie / 123456	DOB: 02/16/2023

Activity Description & Details

Activity: Register the child's profile on...

What is Planned

Add Details: [\(expand full screen\)](#)

Test Narrative

✓ ABC

3986

02/08/2024 11:32 AM - **Test, Worker**
will remain listed on the agencies website for recruitment purposes.

What is Completed

Complete at least one of the following:

Save

Cancel

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:



Creating a Child Recruitment Plan

Manage Recruitment Plan

CASE NAME / ID: **Test, Adult / 121212**

Adoption / Open (09/21/2022)

CHILD NAME: **Sacwis, Susie / 123456**

DOB: **02/16/2023**

✓ Your data has been saved.

Child Recruitment Plan Summary

Effective Date: *

01/23/2024



End Date:



[Add Activities to Current Plan](#) ▼

Current Activities

	Activity	Planned	Completed
edit	Register the child's profile on...	02/08/2024 : will remain listed on the agencies website for recruitment purposes....	
edit	Test Activity	04/29/2024 : Test Narrative	04/29/2024: Testing

Status: *

Complete ▼

Apply

Save

Cancel

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

Child Recruitment Planning Filter Criteria

Effective Date: *



From Date

To Date



Child Name:

Sort Results By:

☐ Include Created in Error

Filter

Child Recruitment Activities

Result(s) 1 to 5 of 5 / Page 1 of 1

	Recruitment Plan ID	Child Name / ID	Effective Date	End Date	Status	Linked	
view	11111	Sacwis, Susie / 123456	06/29/2023	09/18/2023	Complete	Matching Conference(s): 37199527	
edit	22222	Sacwis, Susie / 123456	01/23/2024		Active	Matching Conference(s): 37262675	
view	33333	Sacwis, Susie / 123456	03/15/2023	04/05/2023	Closed	Matching Conference(s): 37199527	

Creating a Child Recruitment Plan

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.

Manage Recruitment Plan

CASE NAME / ID: **Test, Adult / 121212**

Adoption / Open (09/21/2022)

CHILD NAME: **Sacwis, Susie / 123456**

DOB: **02/16/2023**

Child Recruitment Plan Summary

Effective Date: *

01/23/2024



End Date:



[Add Activities to Current Plan](#) ▼

Current Activities

	Activity	Planned	Completed
edit	Register the child's profile on...	02/08/2024 : will remain listed on the agencies website for recruitment purposes....	
edit	Test Activity	04/29/2024 : Test Narrative	04/29/2024: Testing

☐ Include Created in Error

Status: *

Complete ▼

Apply

Save

Cancel

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

Creating a Child Recruitment Plan

Generating a Child Recruitment Plan Report

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

1. Click the report icon.

Child Recruitment Planning Filter Criteria

Effective Date: *   Child Name:


From Date To Date

☐ Include Created in Error

Filter

Child Recruitment Activities

Result(s) 1 to 1 of 1 / Page 1 of 1

	Recruitment Plan ID	Child Name / ID	Effective Date	End Date	Status	Linked
	1111	Sacwis, susie / 123456	07/01/2016	10/01/2018	Active	 

The **Document Details** screen appears.

2. Click, **Generate Report**.

Document Details

Document Category: Document Title: Child Recruitment Report

Work-Item ID: 0101 Work-Item Reference: Sacwis, Susie

Task ID: 11222 Task Reference:

Document History

ID	Date Created	Employee ID	Name
----	--------------	-------------	------

Document History

Generate Report

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

3. Click, **Save**.

Creating a Child Recruitment Plan

Child Recruitment Plan

TEST COUNTY CHILDREN SERVICES		
CHILD RECRUITMENT PLAN ID		
Child's Name / ID:	Case ID:	
Effective Date: 06/29/2023	End Date: 09/18/2023	Status: Closed
Linked: Matching Conference(s) ID:		
Activity: Register the child's profile on...		
What is Planned:		
06/29/2023 09:23 AM - Ongoing		
What is Completed:		
Date submitted to own agency website: Own Agency website child profile URL:		
Date submitted to Ohio Adoption Photolisting: OAPL Number: Ohio Adoption Photolisting child profile URL:		
Date submitted to AdoptUSKids: AdoptUSKids Number: AdoptUSKids Sibling Number: AdoptUSKids child profile URL:		
09/18/2023 12:53 PM - Complete but ongoing.		

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

Document Details

Document Category:

Document Title:

Child Recruitment Report

Work-Item ID:

1111

Work-Item Reference:


Sacwis, Susie

Task ID:

12122

Task Reference:

Document History

ID	Date Created	Employee ID	Name
1234123 	04/29/2024 11:49 AM		

Document History

Generate Report

Cancel

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