

Using the Copy/Move Function



Knowledge Base Article

Using the Copy/Move Function

Table of Contents

Overview	3
Defining Terminology	3
Using the Copy/Move Functionality to Correct Common Issues	3
Submitting a Copy/Move Request	3

Using the Copy/Move Function

Overview

The Copy/Move functionality allows a State Administrator to select a Home Provider (Foster Care and/or Adoption) and separate it into two Provider IDs.

Defining Terminology

- **Source Provider:** The existing Provider ID that has already been created, information entered in and/or licensed.
- **Destination Provider:** The new Provider ID where information from the Source Provider will be entered in to. As detailed below, this can be a Provider ID already created by your agency, or the Destination Provider can be created by the system.
- **Copy:** Information chosen from the Source Provider will be copied into the Destination Provider and will remain in the Source Provider
- **Move:** Information chosen from the Source Provider will be moved into the Destination Provider, and will be deleted from the Source Provider

Using the Copy/Move Functionality to Correct Common Issues

The Copy/Move Functionality can correct two common issues:

- The agency has placed an unmarried couple on an Adoptive Provider record (only married couples may share an Adoptive Care Provider Type). The State Administrator can either split the Adoptive Care into two records (one for each Applicant), or remove the Adoptive Care from a joint Foster/Adoptive Study into a new Provider ID.
- A Provider has decided to separate/divorce, but both Applicants wish to remain as Foster and/or Adoptive parents. The State Administrator can copy the existing Provider record and create a second Provider ID.

Submitting a Copy/Move Request

Important: Prior to submitting a Copy/Move request, it is critical that an effort is made to thoroughly review the provider record to ensure the provider type, provider status, and provider type status information is correct. Please complete any outstanding work items, such as Large Family Assessments, Rule Violations, Activity Logs, etc. If any of these areas are incorrect, please correct them prior to requesting the Copy/Move.

1. The user may create a new inquiry, which is a duplicate of the original inquiry, using the exact same dates of the inquiry and inquiry activity logs, reason for inquiry, provider types (unless you are wishing to split off an adoptive only

Using the Copy/Move Function

Provider ID), as well as the participants which were included as part of that original inquiry.

2. Once screened in, instead of linking the new inquiry to the existing Provider ID, press the Add New Provider button to create a second Provider ID.

Note: The benefit to doing this ensures your agency and user IDs are linked to and assigned the Inquiry and Provider (more information about this below). Once the new Provider is created, however, it is requested that your agency does NOT modify this new Provider record in any way. Alternatively, you can ask that the new Provider ID is automatically created by the system; in doing so, this new inquiry will show as having been created by a State Administrator.

3. Complete the Problem Report and Copy/Move request.
4. Send the Problem Report and Copy/Move request to the Help Desk.

Note: With input from the agency making the request, the State Administrator can select which components of the provider record they would like to copy/move. Once the request is completed, the agency will typically need to amend both Provider IDs to reflect the changes in circumstance (i.e. – change in occupancy, relocation, etc.).

A sample spreadsheet has been attached to show how the information can be sent in to the Help Desk.

Information Needed on the Copy/Move Request:

- **Provider ID/IDs**

You will need to provide the Source (or original) Provider ID and Name, and Destination (or 'new') Provider ID if it's been created. Alternatively, you should indicate if you wish to have the system create it.

- **Provider Type (Foster Care and Adoptive Care only)**

Please list what Provider Type(s) are on the Source Provider and which ones you wish to see on the Destination Provider. At this time, the system cannot copy/move Kinship Provider Types, 1692s or Adoptive Care International, and they must remain on the Source Provider. An open Provider Type must remain on the Source record.

Using the Copy/Move Function

- **Initial Home Studies**

Indicate which of the Initial Home Studies and their Provider Type on the Source Provider you would like moved to the Destination Provider). Any generated reports will not be copied or moved.

- **Recertifications/Updates/Amendments (if applicable)**

Indicate which of the Review Home Studies and their Provider Type from the Source Provider you would like moved/copied to the Destination Provider). If a Provider Type is being moved (for example, Adoptive Care), any adoptive care records that aren't chosen for moving will be deleted from the Source Provider. Any generated reports will not be copied or moved.

- **Applicants**

List Applicants Full Names

Indicate on which record you would like them to remain and/or what Role they will have (Applicant 1, Adult Household Member, etc.)

- **Current Member Information**

List all biological children, adopted children and Adult Household Members and on which provider record you would like for them to be placed on.

Do not list any placed children or Living Arrangements. All placements/Living Arrangements will remain on the Source Provider. If placed children will be moving to the Destination Provider, a new placement request will need to be entered after the Copy/Move process is completed, using the new Provider ID.

- **Approval/Certifications**

List all Approval/Certifications from the Source Provider which should be copied/move to the Destination Provider). These should correspond with all the Provider Types, Home Studies and Recertification/Updates/Amendments you wish to copy and/or move, as well as any transfers or closures.

Using the Copy/Move Function

- **Acceptance Criteria**

List all Provider Type/Effective Dates for Acceptance Characteristics and Usage Placement Criteria records from the Source Provider you would like to be on the Destination Provider. They should correspond to those linked to the Home Studies chosen to copy/move.

- **Description of Home (DOH)**

List all Description of Home records from the Source Provider you would like to be on the Destination Provider.

- Bed Occupants data will only copy over Destination Provider Members. DOH records will always be copied, as they are used in both foster and adoptive studies.

- **Description of Family (DOF)**

List all Description of Family records from the Source Provider you would like to be on the Destination Provider.

DOF records will always be copied, as they are used in both foster and adoptive studies.

- **Complaints/Rule Violations and Waivers**

List all Complaints/Rule Violations and Waiver records from the Source Provider you would like to be on the Destination Provider

- **Activity Logs**

List a date range or specific activity logs that you wish to be on the Destination Provider or indicate if you want all activity logs copied over. The system will only copy over associated participants to these records if they remain on the Destination Provider. Associated placed children from the Source Provider will not copy over.

Using the Copy/Move Function

- **Large Family Assessments**

Indicate which LFA records you want on the Destination Provider if they include an Adoptive Provider Type.

After completion of the copy/move process, the Destination Provider will have the following markers to indicate it came from a Source Provider:

On the Provider Overview, you will see the following hyperlink in the Provider Actions grid: **Copy/Move Provider Information Request(s)**.

Click the hyperlink.

PROVIDER NAME / ID: [REDACTED] CATEGORY / STATUS: **Home / Active**

PRIMARY ADDRESS: [REDACTED] PRIMARY CONTACT: [REDACTED]

Provider Actions

[Provider Information](#) | [Linked 1692 Providers](#) | [Copy/Move Provider Information Request\(s\)](#)

The **Copy/Move Provider Information Request History** screen appears.

Status	Source Provider Name/ID	Destination Provider Name/ID	Requestor	Request Date
Completed	[REDACTED]	[REDACTED]	[REDACTED]	11/05/2018

All Activity Logs copied/moved to the Destination Provider will display, '**Created By**' a State Utilities Administrator.

Activity Log

Results(s) 1 to 10 of 332 / Page 1 of 34

[Add Activity Log](#)

	Start Date/ Activity State	Contact Type	Category	Sub-Category	Responsible Worker	Created By
view report	09/21/2018 Completed	Letter To	Foster Care	Licensing Information	[REDACTED]	Utilities Administrator, State
Associated Participants:						
view report	09/21/2018 Completed	Letter To	Foster Care	Licensing Information	[REDACTED]	Utilities Administrator, State
Associated Participants:						
view report	08/02/2018 Completed	Face-to-Face Visit with Provider(s)	Foster Care	Assessment Visit	[REDACTED]	Utilities Administrator, State

Using the Copy/Move Function

In the **Maintain Home Study History** grid, you'll see a warning message about records copied/moved, and a badge next to the home study which will indicate it has been brought over from a Source Provider.

Maintain Home Study History							
⚠ In Home Studies marked as 'Copy/Move' information may be incomplete due to the copying/move of provider information.							
	Provider Type	Home Study Type	Start Date	Status	Recommendation	Recommendation Date	Agency
view	Foster Care	Amend	07/02/2018	Approved	Approve	07/03/2018	Ohio Child Welfare Agency
copy	Copy/Move						
report							
view	Foster Care	Initial	02/07/2018	Approved	Approve	06/29/2018	Ohio Child Welfare Agency
report	Copy/Move						

The SACWIS Provider Team requests you submit the name, phone number, and e-mail address of the individual requesting the Copy/Move, as we may need to contact them while in the process of completing this function to ensure the correct information is being modified.

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