

# **Recording a Living Arrangement**



## **Knowledge Base Article**

# Recording a Living Arrangement

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# Recording a Living Arrangement

## Overview

This article explains how to document when a child is living outside of their home but remains in the custody of their parent/guardian. This is different from the Legal Guardianship record.

For more information on Legal Guardianship, please refer to the Knowledge Base Article “Recording a Legal Guardianship / Custody Record”.

### Important:

- Ohio SACWIS users are strongly encouraged to use **Recording a Living Arrangement** functionality so a youth’s location can be properly documented.
- To complete the process of recording case services (paid and unpaid) for the caretakers / caregivers of the **Living Arrangement**, you will need to **add case services for the caregivers / caretakers and/or case members**. For additional information on how to do this, please refer to the **Managing Case Services** Knowledge Base Article.
- At the end of this Knowledge Base Article, there is a **Generating Reports** section that discusses how to run related **Children in Living Arrangement** reports that can be attached to a Case Plan (if needed) or submitted to the court (if requested).

## Navigating to the Living Arrangement Information Screen

Complete the following steps to record a **Living Arrangement**:

1. From the Ohio SACWIS **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Select the appropriate **Case ID** link.

**Note:** If you know the **Case ID** number, you can also use the **Search** link at the top of the **Home** screen and navigate to the **Case Overview** screen.

4. On the **Case Overview** screen, click the **Living Arrangement** link in the **Navigation** menu.

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The screenshot shows the 'Case Overview' page. The 'Case' tab is highlighted in the top navigation bar. In the left sidebar, 'Living Arrangement / Guardianship' is highlighted. The main content area shows case details for 'Simpson, Homer / 61912831'. A message states: 'One or more active case members under age 22 is missing ICWA information in Person Demographics'. Below this are tabs for 'Action Items', 'Case Alerts', 'Dashboard', and 'Assignments / Eligibility'. The 'Action Items' tab is active, showing 'No Action Items Found'.

The **Living Arrangement Records** screen appears.

5. In the **Child's Name** field, select the appropriate child. (Required)

**Note:** The **Child's Name** field displays all case members (active and inactive).

6. Click the **Add Living Arrangement** button.

The screenshot shows the 'Living Arrangement Records' screen. The 'Living Arrangement' tab is active. The 'Living Arrangement Filter Criteria' section includes fields for 'From Begin Date', 'To Begin Date', 'Child's Name' (a dropdown menu), 'Created in Error' (radio buttons for 'Exclude' and 'Include'), and 'Sort Results By' (a dropdown menu). Below this is a 'Filter' button and a 'Clear Form' button. The 'Living Arrangement Records' table is currently empty, showing 'No Result Found!'. At the bottom, the 'Child's Name' dropdown is open, showing a list of children: 'Simpson, Bart : 01/01/2012', 'Simpson, Lisa : 01/01/2014', 'Simpson, Marge : 01/01/1965', and 'Simpson, Homer : 01/01/1960'. The 'Add Living Arrangement' button is highlighted with a red box.

## Recording a Living Arrangement

The **Living Arrangement Information** screen appears displaying the selected child's name as read only.

### Completing the Living Arrangement Information Screen

1. In the **Begin Date** field, enter the appropriate date.

**Note:** The **Begin Date** field can be back-dated, but not future dated. The system uses the begin date for validation purposes as explained later.

2. In the **Living Arrangement Type** field, select the appropriate type from the drop-down list. If needed, refer to the additional information below.

Living Arrangement Information

Agency: Ohio Child Welfare Agency

Person ID: 28832257

Child Name: Simpson, Bart

DOB: 01/01/2012

Begin Date: \* 10/24/2022

Living Arrangement Type: \* Kinship Care - Relative Home

Who Holds Legal Responsibility: \*

Available Person(s):

- Simpson, Lisa
- Simpson, Marge
- Simpson, Homer

Selected Person(s) Holding Legal Responsibility:

### Important Information about the Living Arrangement Type Field

- As shown in the chart below, the **Living Arrangement Types** are either Person based or Provider based:

Living Arrangement Type Chart	
Person Based	Provider Based
Kinship Care – Relative Home	Foster Care
Kinship Care – Non Relative Home	Hospital/Nursing Home
Child of Minor Parent**	Juvenile Detention Center

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** See more bullets below about this.	
	Runaway Crisis Center
	Child's Residential Center (CRC)
	Group Home
	Dept of Youth Services (DYS)
	Independent Living

- The selection made in the **Living Arrangement Type** field determines what information appears in the **Caretaker Information** section of the screen (i.e., Person based or Provider based).
- If any of the three **Person Based** values are selected, the **Caretaker Information** grid displays a **Relationship to Child** field and a **Role** field for each Caretaker. After the **Add Caretaker** button is clicked, drop-down boxes appear for **Relationship to Child** and **Role** fields. These two fields are discussed in more detail below. (If **Provider Based** values are selected, these fields will not appear.)

The screenshot shows the 'Caretaker Information' section of a software interface. It features a table with four columns: 'Caretaker', 'Primary Address', 'Relationship To Child', and 'Role'. The 'Caretaker' column contains the text 'Simpson, Marge/28632259'. The 'Relationship To Child' column contains 'Biological Mother'. The 'Role' column has a dropdown menu with three options: 'Caretaker', 'Other Involved Adult', and 'Other Involved Child'. A red box highlights the 'Relationship To Child' and 'Role' columns. Below the table, there is a 'Relationships' section with a dropdown menu showing 'Simpson, Marge : 01/01/1965' and two buttons: 'Add Caretaker' and 'Person Search'. Another red box highlights this bottom section.

- Only one current Living Arrangement record can exist at a time per child. A child can have multiple Living Arrangements, but the dates cannot overlap.
- If the selected Caretaker (any Role) is an Active provider member of an Active (status) Home provider, upon saving a Living Arrangement record, the following notification will be sent to all assigned workers, the provider, and their supervisors stating:

**<Person First Name and Last Name; Person ID> associated to <Provider ID(s)> has been identified as a Living Arrangement Caretaker for <Child First Name and Last Name; Person ID>. Please add this child as a member of this provider.**

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### Important Information When Selecting the Child of a Minor Parent

- If the **Child of Minor Parent** value is selected from the Person-based values, then only the values of **Mother Holds Custody**, **Father Holds Custody**, or **Both Mother and Father Hold Custody** can be selected in the **Who Holds Legal Responsibility** field (discussed below) and validated upon save.
- If the **Child of Minor Parent** value is selected and the **Caretaker** is in a placement setting as of the Living Arrangement begin date, the address displayed will be the provider's primary address associated with the current placement setting (as of the system date or as of the Living Arrangement end date, if ended).
- When the child of a minor parent appears in two cases, the Living Arrangement record should be added on the parent's case in which the child of a minor parent is an active member.
- If the **Child of Minor Parent** value is selected, then upon Save, the system validates that at least one Caretaker has been selected and that minor parent is in a placement setting as of a Living Arrangement begin date.
- For additional information on the Living Arrangement Type **Child of Minor Parent**, please refer to the **Generating Payments and Medicaid for the Child of a Minor Parent** Knowledge Base Article.

### Continuing with the Process in Ohio SACWIS

1. In the **Who Holds Legal Responsibility** field, select the appropriate value.
2. In the "select" field (to the left of the **Add** and **Remove** buttons), click the appropriate **Name(s)**.

**Note:** The "select" field lists the names of all Active and Inactive case members.

3. Click the **Add >** button. The selection moves to the "selected" field on the right.
4. If you added an incorrect person, click the name to highlight it and click the **< Remove** button. The name moves back to the "select" field on the left.

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**Living Arrangement Information**

Agency: Ohio Child Welfare Agency

Person ID: 28632257

Child Name: Simpson, Bart DOB: 01/01/2012

Begin Date: \* 10/24/2022

Living Arrangement Type: \* Child of Minor Parent

Who Holds Legal Responsibility: \* Both Mother and Father

Available Person(s):

Search Add

Simpson, Lisa ; 01/01/2014

Selected Person(s) Holding Legal Responsibility:

Remove Search

Simpson, Homer ; 01/01/1980

Simpson, Marge ; 01/01/1985

### Important:

- You will only select one name, unless the value chosen in the **Who Holds Legal Responsibility** field is **Both Mother and Father Hold Custody**. In those cases, the system requires that two names be selected from the “select” field.
- If the desired name does not display in the “select” field, navigate to the **Members** tab and verify that the person is a case member.

## Completing the Caretaker Information Section

Follow the steps below to complete the **Caretaker Information** section of the **Living Arrangement Information** screen.

- If you had selected a Person-based value in the **Living Arrangement Type** field, select the appropriate **Caretaker** name from the drop-down list.
  - OR if you had selected a Provider-based value in the **Living Arrangement Type** field, please skip to **Step 6** below.
- Click the **Add Caretaker** button. The selected person’s name and address appear in the **Caretaker Information** grid.



## Recording a Living Arrangement

Child Name: Simpson, Bart      DOB: 01/01/2012

Begin Date: \* 10/24/2022

Living Arrangement Type: \* Kinship Care - Relative Home

Who Holds Legal Responsibility: \* Both Mother and Father

Available Person(s):

Search	Add
Simpson, Lisa ; 01/01/2014	

Selected Person(s) Holding Legal Responsibility:

Remove	Search
	Simpson, Homer ; 01/01/1980
	Simpson, Marge ; 01/01/1985

**Caretaker Information**

Caretaker	Primary Address	Relationship To Child	Role
<input type="text"/>			

- If the person's name does not display in the drop-down list, perform one of the following actions:
  - Click the **Person Search** button (shown above) to locate the person. Once selected, the person's name and address appear in the **Caretaker Information** grid.
  - Navigate to the **Members** tab and add the person as a case member or associated case member. Then select the person's name from the drop-down list.

The **Caretaker Information** grid populates. The **Relationship to Child** field and **Role** field also appear in the grid row.

**Caretaker Information**

Caretaker	Primary Address	Relationship To Child	Role
Bouvier, Patty/28632364		Aunt	Caretaker

[unlink](#)

**Relationships**

## Recording a Living Arrangement

### Note:

- The drop-down list contains the names of all active and inactive case members, as well as the associated case members.
- There is no limit to how many people can be added to the **Caretaker Information** section, but at least one person must have the **Role** of **Caretaker**.
- Additional people in the household can be added to the **Caretaker Information** grid at your agency's discretion.
- As mentioned previously, if you select any of the three **Person Based** values shown in the **Living Arrangement Type Chart**, the **Caretaker Information** grid appears (once the caretaker name is selected) displaying a **Relationship to Child** field and a **Role** field. If a **Provider Based** value is selected, neither of these fields appear in the grid.

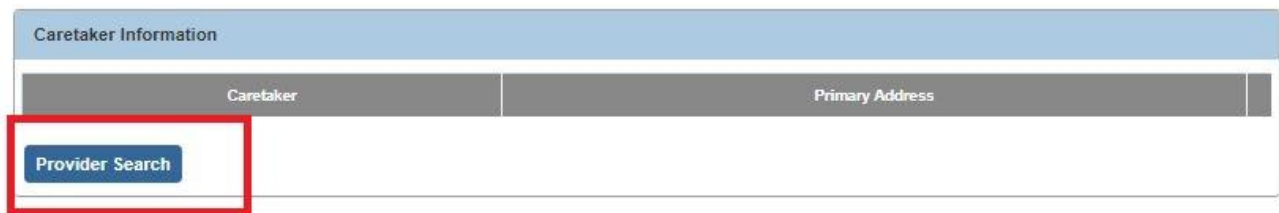
For each Person-based Caretaker listed in the **Caretaker Information** section:

4. Select the appropriate relationship in the **Relationship to Child** field. (Required)
5. In the **Role** field, select the appropriate role.

**Important:** At least one value in the **Role** column must be **Caretaker** to save the record.

6. If you had selected a Provider-based **Living Arrangement Type**, click the **Provider Search** button to search for the Provider. Once selected, the provider's name and address appear in the **Caretaker Information** grid.

Following is an example of a Provider-based **Caretaker Information** section where no **Relationship to Child** field or **Role** field appears:



Caretaker Information	
Caretaker	Primary Address

Provider Search

**Note:** When a Provider-based living arrangement is selected, at least one provider must be chosen to save the record.

7. In the **Comments** field, enter any relevant comments.

## Recording a Living Arrangement

8. **Prior to saving the record**, if an incorrect provider or person was added, click the **Unlink** hyperlink in the appropriate grid row to remove that provider or person.
9. If you removed an incorrect provider or person, repeat the steps above to add the correct provider or person.

**Caretaker Information**

Caretaker	Primary Address	Relationship To Child	Role	
Bouvier, Patty/28632364		Aunt	Caretaker	<a href="#">unlink</a>

**Relationships**

**Add Caretaker** **Person Search**

**Comments:**

Patty is that maternal aunt and sees the children often and has a close relationship with them. |

**Spell Check** **Clear** 3903

10. When complete, click the **Save** button at the bottom of the screen.

**End Date:**

**End Reason:**

☐ **Created In Error**

**Apply** **Save** **Cancel**

The **Living Arrangement History** screen appears.

**Important:** After clicking the **Save** button, the Living Arrangement record is “frozen” and cannot be modified, except for the **Comments** field, **End Date** field, **End Reason** field, and **Created in Error** check box, which are discussed later in this document. Once end-dated, the **Comments** field also becomes frozen.

If there are any changes to the Living Arrangement record (such as the caretaker has changed, the child is no longer in that living arrangement, or the information is simply

## Recording a Living Arrangement

incorrect), you can either end date the record and include the end reason, or mark the record as **Created in Error**.

If you enter a new record, you can use the **Copy** link (discussed below) or follow the steps previously discussed to select the child's name in the **Child Name** field (**Living Arrangement Records** screen).

### Living Arrangement Error Messages

When data on the **Living Arrangement Information** screen is saved, Ohio SACWIS validates that the information is accurate and (if needed) provides instructions on what must be corrected to save the record.

The following are Ohio SACWIS error messages that could appear:

**A) The Child has a current Living Arrangement. You must end date the current Living Arrangement before adding a subsequent Living Arrangement record.**

This message appears when a current Living Arrangement Record exists for a child and you attempt to create a new Living Arrangement Record where the new Living Arrangement record's begin date starts after the begin date of the current Living Arrangement record.

**B) The Living Arrangement begin date or end date cannot overlap a custody episode record.**

This message appears when a Living Arrangement record time period overlaps a custody episode record for the child.

**C) The Living Arrangement begin date or end date cannot overlap a placement record.**

This message appears when the child has a current open Placement Record, so you cannot create a Living Arrangement.

**D) The Living Arrangement begin date or end date cannot overlap an initial removal record.**

This message appears when the child has a current open Initial Removal Record, so you cannot create a Living Arrangement.

**E) The Living Arrangement begin date or end date cannot overlap a Child Legal Status record.**

This message appears when the child has a current open Child Legal Status Record, so you cannot create a Living Arrangement.

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**F) The child must be an active case member as of the Living Arrangement begin date.**

This message appears to show that the child was an active case member at the time of the begin date, so you cannot create a Living Arrangement.

**G) The selected members in the Who Holds Legal Responsibility must be an active case member(s) as of the Living Arrangement begin date.**

This message appears to show that the selected members in the **Who Holds Legal Responsibility** field were active case members at the time of the begin date, so you cannot create a Living Arrangement.

**H) The Living Arrangement begin date or end date cannot overlap a custody episode record.**

This message appears to show that the child has an active custody record at the time of the begin date, so you cannot create a Living Arrangement.

### End Dating a Record

If any Living Arrangement information has changed after a record was saved, you will need to do one of the following:

- Enter the **End Date**, as well as an **End Reason**.
- OR
- Click the **Created in Error** check box to create a new Living Arrangement record.

### Important Information When End Dating a Living Arrangement

- A Living Arrangement should be end dated when it is no longer valid.
- If the child is only active in one case, then a Living Arrangement must be Closed in order to Close the case.
- A Living Arrangement record can only be marked as **Created in Error** if that Living Arrangement falls within the most recent case episode.
- After end dating the Living Arrangement, the **End Date** field and **End Reason** field are frozen. However, the **Created in Error** field and the **Comments** field remain enabled.
- After a Living Arrangement record is marked as **Created in Error**, the record becomes frozen.

## Recording a Living Arrangement

- If an end date is entered, an end reason is required. Likewise, if an end reason is entered, the end date is required.
- If the end date is removed, the system will remove the end reason.
- The end reason of **Provider Closed** or **Moved from Treatment Setting** cannot be selected when the Caretaker is Person-based.
- If the end reason is **Case Closure**, the **Narrative** field is required.

## End-Dating a Living Arrangement

1. Navigate to the **Living Arrangement Records** screen using the steps previously discussed.
2. Click the **Edit** link in the appropriate row.

Case Overview  
Activity Log  
Attorney Communication  
Intake List  
Safety Assessment  
Substance Abuse Screening  
Forms/Notices  
Category/Pathway Switch  
Safety Plan  
Actuarial Risk Assessment  
Family Assessment  
Ongoing Case A/I  
Specialized A/I Tool  
Law Enforcement  
Justification/Waiver  
Case Services  
Legal Actions  
Legal Custody/Status  
Living Arrangement / Guardianship  
Initial Removal  
Placement Request

CASE NAME / ID: *Simpson, Homer* / 61912831 Assess/Invest Open (10/20/2022)

Living Arrangement Legal Guardianship/Custody

Living Arrangement Filter Criteria

From Begin Date:  To Begin Date:   
Child's Name:  Created in Error: ☒ Exclude ☐ Include  
Sort Results By:  Begin Date (Descending) ☒ Current Case Episode ☐ View Historical

Filter Clear Form

Living Arrangement Records

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

	Child / DOB	Who Holds Legal Responsibility	Caretaker Name	Begin Date/End Date	End Reason	Agency	Created in Error
<a href="#">edit</a>	<a href="#">Simpson, Bart</a> 01/01/2012	Simpson, Homer, Simpson, Marge	Bouvier, Patty	10/24/2022		Ohio Child Welfare Agency	
<a href="#">delete</a>							
<a href="#">report</a>							

The **Living Arrangement Information** screen appears.

3. In the **End Date** field, enter the appropriate date.
4. In the **End Reason** field, select the reason that the Living Arrangement is being ended from the drop-down list.
5. Click the **Save** button.

## Recording a Living Arrangement



The **Living Arrangement Records** screen appears.

After saving the record, you can do one of the following:

- Enter a new Living Arrangement record using the **Copy** link as discussed below.
- Select the child's name and click the **Add Living Arrangement** button on the **Living Arrangement Information** screen (also called the **Living Arrangement History** screen) as previously discussed.
- Or, if no new living arrangement information exists, do not add a living arrangement.

### Copying a Living Arrangement Record

A **Copy** link is available for all Living Arrangements, including those marked as **Created in Error**.

**Note:** When copying a Living Arrangement, all fields (except the **Child Name** and **Agency**) of the Living Arrangement are copied in Edit mode. The Agency will be pre-populated with the logged-in user's associated Agency.

1. Navigate to the **Living Arrangement Records** screen using the steps above.
2. Click the **Copy** link in the appropriate row.

## Recording a Living Arrangement

[Case Overview](#)  
[Activity Log](#)  
[Attorney Communication](#)  
[Intake List](#)  
[Safety Assessment](#)  
[Substance Abuse Screening](#)  
[Forms/Notices](#)  
[Category/Pathway Switch](#)  
[Safety Plan](#)  
[Actuarial Risk Assessment](#)  
[Family Assessment](#)  
[Ongoing Case A/I](#)  
[Specialized A/I Tool](#)  
[Law Enforcement](#)  
[Justification/Waiver](#)  
[Case Services](#)  
[Legal Actions](#)  
[Legal Custody/Status](#)  
[Living Arrangement / Guardianship](#)  
[Initial Removal](#)  
[Placement Request](#)  
[Placement/ICCA](#)  
[Residential Treatment Information](#)  
[Independent Living](#)  
[Case Plan Tools](#)

CASE NAME / ID:  
**Simpson, Homer** / 61912831

Assess/Invest  
Open (10/20/2022)

Living Arrangement
Legal Guardianship/Custody

Living Arrangement Filter Criteria

From Begin Date:  
To Begin Date:

Child's Name: 
Created in Error: ☒ Exclude ☐ Include

Sort Results By:  Begin
☒ Current Case Episode ☐ View Historical

Filter Clear Form

Living Arrangement Records

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

	Child / DOB	Who Holds Legal Responsibility	Caretaker Name	Begin Date/End Date	End Reason	Agency	Created in Error
<a href="#">edit</a> <a href="#">copy</a> <a href="#">report</a>	Simpson, Bart 01/01/2012	Simpson, Homer; Simpson, Marge	Bouvier, Patty	10/24/2022		Ohio Child Welfare Agency	

The **Living Arrangement Information** screen appears displaying the copied information from the selected record.

If the **Living Arrangement Type** is going to change (be modified), you can **Unlink** the Caretaker information.

- To unlink the Caretaker, click the **Unlink** hyperlink in the appropriate row.



## Recording a Living Arrangement

Living Arrangement Information

Agency: Ohio Child Welfare Agency  
Person ID:  
Child Name:  <  
DOB:  
Begin Date: \* 10/24/2022   
Living Arrangement Type: \* Kinship Care - Non Relative Home  
Who Holds Legal Responsibility: \* Both Mother and Father

Available Person(s):

Add  
Simpson, Bart ; 01/01/2012  
Simpson, Lisa ; 01/01/2014

Selected Person(s) Holding Legal Responsibility:

Remove  
Simpson, Homer ; 01/01/1980  
Simpson, Marge ; 01/01/1985

Caretaker Information

Caretaker	Primary Address	Relationship To Child	Role	
Bouvier, Patty/28632364			Caretaker	<a href="#">unlink</a>

Relationships

Add Caretaker Person Search

A message appears asking if you want to unlink the Caretaker record.

- Click the **OK** button.

**sacwis-uat.jfs.ohio.gov** says

To unlink this caretaker record, click OK.

OK

Cancel

The Caretaker information is removed.

- Complete the fields as discussed in the steps above.
- When complete, click the **Save** button.

## Recording a Living Arrangement

### Inserting a Living Arrangement Record between Existing Dates

For historical tracking purposes, you can enter a Living Arrangement record that falls between two other already existing Living Arrangement records, including custody episodes. To do so, complete the following steps.

**Note:** Living Arrangements can only be inserted if the dates do not overlap with an already recorded Living Arrangement.

1. Navigate to the **Living Arrangement Records** screen using the steps previously discussed.
2. Click the **Edit** link or **Copy** link in the appropriate row.

[Safety Assessment](#)  
[Substance Abuse Screening](#)  
[Forms/Notices](#)  
[Category/Pathway Switch](#)  
[Safety Plan](#)  
[Actuarial Risk Assessment](#)  
[Family Assessment](#)  
[Ongoing Case A/I](#)  
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[Residential Treatment Information](#)  
[Independent Living](#)  
[Case Plan Tools](#)

**Living Arrangement**

Legal Guardianship/Custody

Living Arrangement Filter Criteria

From Begin Date:

To Begin Date:

Child's Name:

Created in Error :

☒ Exclude ☐ Include

Sort Results By:

Begin

☒ Current Case Episode ☐ View Historical

Filter

Clear Form

Living Arrangement Records

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

	Child / DOB	Who Holds Legal Responsibility	Caretaker Name	Begin Date/End Date	End Reason	Agency	Created in Error
<a href="#">edit</a> <a href="#">copy</a> <a href="#">report</a>	Simpson, Bart 01/01/2012	Simpson, Homer, Simpson, Marge	Bouvier, Patty	10/24/2022		Ohio Child Welfare Agency	

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The **Living Arrangement Information** screen appears.

**Living Arrangement Information**

Agency: Ohio Child Welfare Agency  
Person ID: 26632257  
Child Name: Simpson, Bart  
Begin Date: 10/24/2022  
Living Arrangement Type: Kinship Care - Relative Home  
Who Holds Legal Responsibility: Both Mother and Father

Available Person(s):  
Simpson, Lisa ; 01/01/2014

Selected Person(s) Holding Legal Responsibility:  
Simpson, Homer ; 01/01/1980  
Simpson, Marge ; 01/01/1985

**Caretaker Information**

Caretaker	Primary Address	Relationship To Child	Role
Bouvier, Patty; 26632364		Aunt	Caretaker

Relationships

▼ Add Caretaker Person Search

Comments:  
Patty is that maternal aunt and sees the children often and has a close relationship with them.

Spell Check Clear 4000

End Date: [Date Picker]

3. In the **End Date** field, enter the date for the time frame in which you are trying to record (insert) the historical living arrangement.

### Example:

**Existing Living Arrangement / Custody Episode Record #1:** Jan. 1<sup>st</sup> to Jan. 15<sup>th</sup>

**Existing Living Arrangement / Custody Episode Record #2:** Feb. 1<sup>st</sup> to Feb. 15<sup>th</sup>

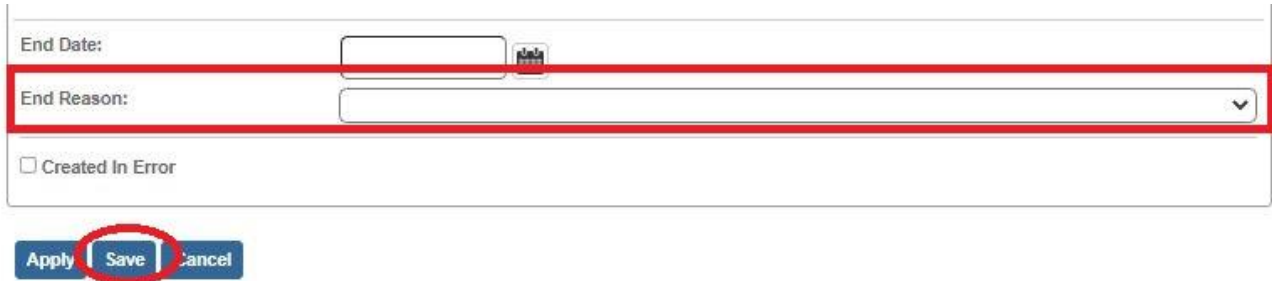
**New Living Arrangement Record (to be added):** Jan. 15<sup>th</sup> to Jan. 31<sup>st</sup>

In this example, you would Edit or Copy record #1. Record the entire Living Arrangement information as discussed above, including the End Date and End Reason, and then save

## Recording a Living Arrangement

the record. If the End Date and End Reason are not entered, upon Save you will receive one of the Error Messages previously discussed.

4. In the **End Reason** field, select the reason the Living Arrangement is being ended from the drop-down list.
5. Click the **Save** button.



The record is saved.

## Viewing and Editing Historical Records (Child Legal Statuses)

To view all historical records as well as end date any open records, click on **Legal Custody/Status** link.

1. To view historical **Child Legal Status** records, navigate to the **Legal Custody/Status** link in the menu using the steps previously discussed.
2. Click the **Legal Custody/Status** link.
3. To update the record (end date or mark as **Created in Error**), click the **Edit** link in the appropriate row.

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[Case Overview](#)  
[Activity Log](#)  
[Attorney Communication](#)  
[Intake List](#)  
[Safety Assessment](#)  
[Substance Abuse Screening](#)  
[Forms/Notices](#)  
[Category/Pathway Switch](#)  
[Safety Plan](#)  
[Actuarial Risk Assessment](#)  
[Family Assessment](#)  
[Ongoing Case A/I](#)  
[Specialized A/I Tool](#)  
[Law Enforcement](#)  
[Justification/Waiver](#)  
[Case Services](#)  
[Legal Actions](#)  
[Legal Custody/Status](#)  
[Living Arrangement / Guardianship](#)  
[Initial Removal](#)  
[Placement Request](#)  
[Placement/CCA](#)  
[Residential Treatment Information](#)  
[Independent Living](#)

CASE NAME / ID:  
**Simpson, Homer** / 61912831

Assess/Invest  
Open (10/20/2022)

Legal Custody & Status Filter Criteria

☐ All Persons  
☐ Persons with a Current or Historical Legal Status  
☒ Persons Under Age 22

Filter

Legal Custody & Status Information

Result(s) 1 to 2 of 2 / Page 1 of 1

	Case Participant	DOB	Custody Start Date - End Date	Legal Status	Legal Status Effective Date - Termination Date	Agency
<a href="#">edit</a>	<a href="#">Simpson, Lisa / 28632258</a>	01/01/2014				
<a href="#">edit</a>	<a href="#">Simpson, Bart / 28632257</a>	01/01/2012				

The Child's **Legal Custody Episode & Status Information** screen appears.

- Click View or Edit to update the fields, as needed. The Child's **Legal Status Details** screen appears.
- When complete, click the **Save** or **Cancel** button.

# Recording a Living Arrangement

## Legal Status Details

Agency:  
Ohio Child Welfare Agency

Custody Episode Start Date:  
07/08/2021 12:00:00 AM

Custody Episode End Date:

Most Recent Legal Guardianship:  
*No Legal Guardianship / Custody records Exist*

Legal Status: \*

Temporary Custody/Placement and Care

Emergency Custody to Agency  
Ex-parte  
Permanent Custody  
Permanent Surrender  
Planned Permanent Living Arrangement  
Temporary Court Order  
**Temporary Custody/Placement and Care**  
Temporary Custody 1st Extension  
Temporary Custody 2nd Extension  
Voluntary Agreement for Care 1st 30 day Extension  
Voluntary Agreement for Care 2nd 30 day Extension

Effective Date: \*

11/29/2021

Effective Time:

HH:MM AM / PM

Termination Date:

Expiration Date:

Narrative

✓ ABC

3000

☐ Created in Error

Created Date: 11/30/2021

Created By:

Modified Date: 11/30/2021

Modified By:

Save

Cancel

## Recording a Living Arrangement

### Security Business Rules in Ohio SACWIS

#### For Living Arrangement:

- Both court workers and placement workers can update records that were created by their logged in agency.
- Court workers and placement workers of the case-owning agency can create Living Arrangement records, along with all assigned workers to the case who have a Role of Court Worker or Placement Worker.
- All workers will be able to view the **Living Arrangement** screens.

#### For Child Legal Status:

- Both court workers and placement workers can update records across agency ownership.
- All workers will be able to view the child's **Legal Custody Status** screens.

### Generating Reports

The **Section 10: Living Arrangement History** of the **Person Overview Report** is a child-specific report generated from the **Forms/Notices** link in the **Navigation** menu in Ohio SACWIS. The report can be printed separately and submitted as an addendum to the **JFS 01444 Case Plan** when the court wants to view the child's living arrangement.

To submit agency-wide living arrangement information, a **Children in Living Arrangement** report can also be generated for the court.

These reports are discussed in the sub-sections below.

## Recording a Living Arrangement

### Generating Section 10 of the Person Overview Report

To run **Section 10** of the **Person Overview Report** which includes the living arrangement history, complete the following steps:

1. From the Ohio SACWIS **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Select the appropriate **Case ID** link.

**Note:** If you know the **Case ID** number, you can also use the **Search** link at the top of the **Home** screen and navigate to the **Case Overview** screen.

4. On the **Case Overview** screen, click the **Forms / Notices** link in the **Navigation** menu.



## Recording a Living Arrangement

The **Maintain Forms/Notices** screen appears.

5. In the **Forms/Notices** field, select **Person Overview**.
6. Click the **Select** button.

The screenshot shows the 'Maintain Forms/Notices' 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 buttons for Workload, Court Calendar, and Placement Requests. The 'Workload' button is circled in red. On the left side, there is a sidebar with a list of links. The 'Forms/Notices' link is circled in red. The main content area shows the 'Maintain Forms/Notices' screen. The 'CASE NAME / ID:' field is empty. The 'Ongoing' status is shown with the date 'Open (05/13/2021)'. The 'Forms/Notices:' dropdown menu is open, showing a list of forms and notices. The 'Person Overview' option is highlighted. The 'Select' button is also circled in red.

The **Document Details** screen appears.

The screenshot shows the 'Document Details' screen. The 'Document Category:' field is set to 'Person Overview'. The 'Work-Item ID:' field is empty. The 'Task ID:' field is set to '10'. The 'Document History' table is empty. The 'Generate Report' button is circled in red.

## Recording a Living Arrangement

- Click the **Generate Report** button.

The **Person Overview** screen appears.

- In the **Person** field, select the appropriate name.
- Click **Section 10: Living Arrangement History** check box.
- Click the **Generate Report** button.

The screenshot shows the 'Person Overview' interface. At the top, there is a 'Person: \*' dropdown menu, which is highlighted with a red rectangle. Below this, there is a 'Print All Sections' link. A section titled 'Print Sections (at least one must be selected) \*' contains a list of checkboxes for various sections. 'Section 10: Living Arrangement History' is checked and highlighted with a red rectangle. At the bottom of the screen, there are two buttons: 'Generate Report' and 'Cancel'. The 'Generate Report' button is highlighted with a red oval.

## Recording a Living Arrangement

The **Section 10: Living Arrangement History** report appears.

11. To save the report, click the **Save** button.

Ohio Department of Job and Family Services

Person Overview

Requestor: [REDACTED] Agency: [REDACTED] County Division of Children and Family Services Date: 10/26/2022 Time: 2:48:59 PM

Person ID: [REDACTED]

Current Status: Active Status Date: 05/28/2015

DOB: 05/28/2015 Age: 7 Gender: Female SSN: No data found

Primary Address: [REDACTED] Primary Phone: [REDACTED]

SECTION 10: LIVING ARRANGEMENT

LIVING ARRANGEMENT HISTORY:

Begin Date: 06/23/2020	Living Arrangement Type: Kinship Care - Relative Home
End Date: 06/03/2021	End Reason: Problem Resolved
Who Holds Legal Responsibility: Mother	
Caretaker Information:	

Page 1 of 1

Save Cancel Review Parameters

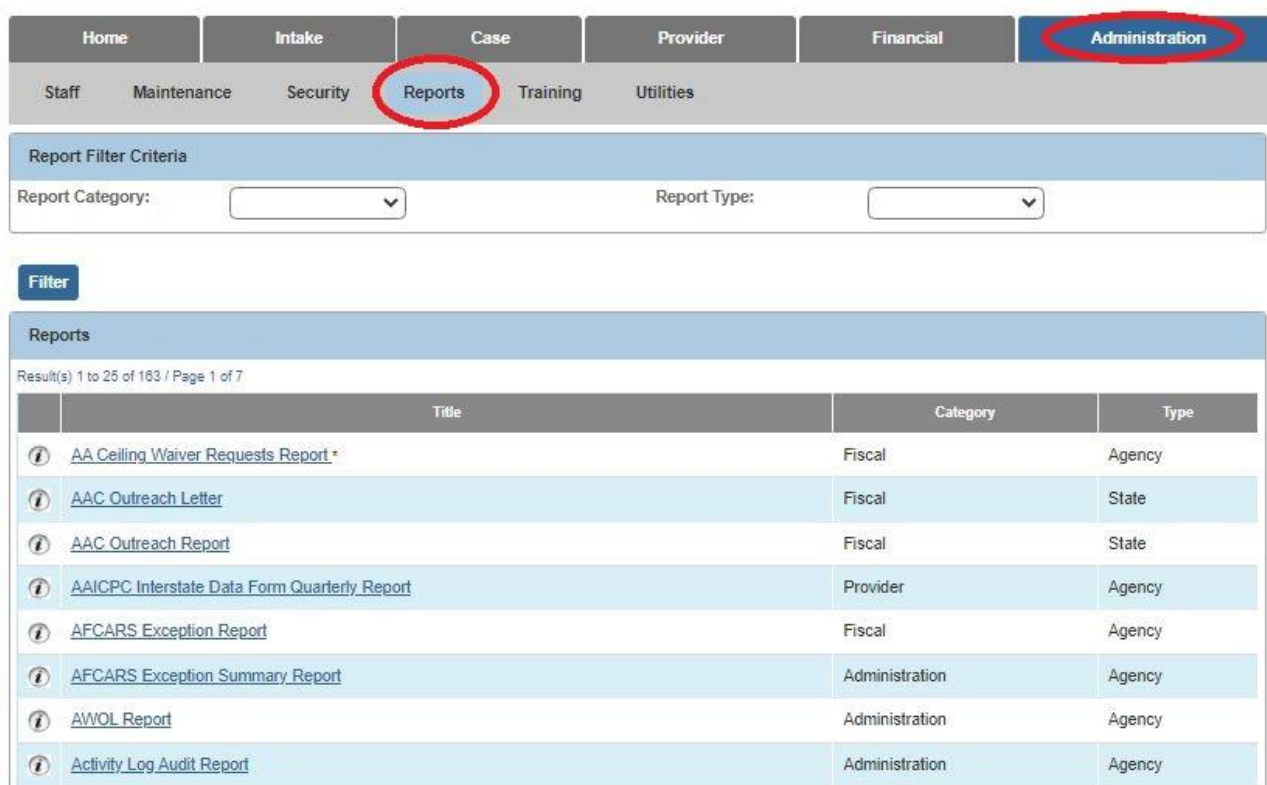
# Recording a Living Arrangement

## Generating the Children in a Living Arrangement Report

The **Children in a Living Arrangement** report provides agency-wide information. To run the report, complete the following steps:

1. From the Ohio SACWIS **Home** screen, click the **Administration** tab.
2. Click the **Reports** tab.

The **Reports** screen appears.



Home	Intake	Case	Provider	Financial	Administration
Staff	Maintenance	Security	Reports	Training	Utilities

Report Filter Criteria

Report Category:  Report Type:

Filter

Reports

Result(s) 1 to 25 of 163 / Page 1 of 7

Title	Category	Type
<a href="#">AA Ceiling Waiver Requests Report</a>	Fiscal	Agency
<a href="#">AAC Outreach Letter</a>	Fiscal	State
<a href="#">AAC Outreach Report</a>	Fiscal	State
<a href="#">AAICPC Interstate Data Form Quarterly Report</a>	Provider	Agency
<a href="#">AFCARS Exception Report</a>	Fiscal	Agency
<a href="#">AFCARS Exception Summary Report</a>	Administration	Agency
<a href="#">AWOL Report</a>	Administration	Agency
<a href="#">Activity Log Audit Report</a>	Administration	Agency

3. The report is listed in alphabetical order and currently listed on Page 4 of the Reports list. Click the link on **Page 4**.
4. Click on the **Living Arrangement Report** link.

## Recording a Living Arrangement

Reports			
Result(s) 78 to 100 of 163 / Page 4 of 7			
	Title	Category	Type
	<a href="#">Intake Statistical Report by Geographical Designation</a>	Intake	Agency
	<a href="#">Justification/Waiver Report</a>	Administration	Agency
	<a href="#">KPIP Expenditure Report</a>	Fiscal	Agency
	<a href="#">KSP Expenditure Report</a>	Fiscal	Agency
	<a href="#">KSP Expiration Report</a>	Fiscal	Agency
	<a href="#">KSP State Hearing Report</a>	Administration	State
	<a href="#">KSP State Provider Invoice Report</a>	Fiscal	State
	<a href="#">KSP State Provider Repayment Plan Report</a>	Fiscal	State
	<a href="#">Living Arrangement Report</a>	Case	Agency
	<a href="#">MEPA Child Report</a>	Administration	Agency
	<a href="#">MEPA Provider Report</a>	Provider	Agency
	<a href="#">Maintain Licensing Activities</a>	Provider	Unit
	<a href="#">Matching Conference &amp; Adoption Activities Due</a>	Case	Agency
	<a href="#">Medicaid Error Report</a>	Fiscal	Agency
	<a href="#">Medicaid Terminations Report</a>	Fiscal	State
	<a href="#">Medical Requirements for Youth in Agency Custody</a>	Administration	Agency
	<a href="#">Medication Detail Report</a>	Case	Agency
	<a href="#">NCANDS Data Exception, Recurrence, and Child Fatality Report</a>	Intake	Agency
	<a href="#">NYTD Statistical Report</a>	Administration	Agency
	<a href="#">Non-ODJFS Providers by Agency Report</a>	Administration	Agency
	<a href="#">Nonrecurring Adoption Subsidy Expenditure Report</a>	Fiscal	State
	<a href="#">Ongoing and Adoption Case Activities Report</a>	Case	Agency
	<a href="#">Out Of State Placement Report</a>	Administration	Agency
	<a href="#">Outcomes of Dispositional Hearings Report</a>	Case	Unit
	<a href="#">PASSS Expenditure Report</a>	Fiscal	State

## Recording a Living Arrangement

The **Report Details** screen appears.

5. In the **Select Report Output Format** section, select the **PDF** or **Excel** radio button to specify the report format. **Excel** is pre-selected.
6. Click the **Generate Report** button.

The screenshot shows the 'Report Details' screen. At the top, there's a header 'Report Details'. Below it, 'Report Category:' is set to 'CASE' and 'Report Title:' is 'Living Arrangement Report'. 'Report Type:' is set to 'AGENCY'. Below this is a 'Report History' section with a table that has columns: ID, Date Created, Employee ID, and Name. Below that is a 'Document History' section. Within 'Document History', there's a sub-section 'Select Report Output Format' which is highlighted with a red box. It contains two radio buttons: 'PDF' and 'Excel', with 'Excel' being selected. Below this, the 'Generate Report' button is circled in red.

The **Living Arrangement Report** screen appears.

7. The **Agency** field is pre-selected. If needed, select the appropriate agency. (Required)
8. Type of Totals to Display is also Required. Options are "Total Children in living arrangement during period" OR "Total Children who entered a living arrangement during period".
9. In the **Begin Date** field, enter the appropriate date. (Required)
10. Click the **Generate Report** button.



## Recording a Living Arrangement

Living Arrangement Report

Agency: \* Ohio Child Welfare Agency

Type of Totals To Display: \* Total children in living arrangement during peri

Begin Date: \* Total children in living arrangement during period

End Date: Total children who entered a living arrangement during period

Generate Report Cancel

The **Children in a Living Arrangement Report** appears as shown in the example below.

11. To save the report, click the **Save** button.

Children in a Living Arrangement Report								
Agency: County Division of Children and Family Services								
From: 10/01/2020								
To: 10/26/2022								
Run Date: 10/26/2022								
Case ID	Case Name	Person ID	Person Name	DOB	Child's Current Age	Gender	Race	
					17	Female	White	
					15	Female	Black/Africa	
					1	Female	White	
					1	Female	White	
					8	Male	Black/Africa	
					12	Female	White	
					1	Male	White	
					6	Male	Black/Africa	
					2	Male	Black/Africa	
					17	Male	Black/Africa	
					17	Male	Black/Africa	
					9	Female	Black/Africa	
					4	Female	Black/Africa	
					4	Female	Black/Africa	
					14	Female	White	
					3	Male	Black/Africa	
					3	Male	Black/Africa	
					7	Female	White	
					7	Female	Black/Africa	
					7	Female	Black/Africa	
					2	Female	Black/Africa	
					4	Female	Black/Africa	
					12	Female	Black/Africa	
					8	Female	Black/Africa	
					4	Male	White	
					11	Female	White	
					6	Male	White	
					12	Male	White	
					11	Male	White	
					3	Male	Black/Africa	
					44	Male	White	
					8	Female	White	
					11	Male	Black/Africa	
					11	Male	Black/Africa	

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