


Managing Case Services



Knowledge Base Article

Managing Case Services

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Overview

This Knowledge Base Article will explain how to access the Ohio SACWIS system for managing the various aspects of case services.

Viewing Case Service Information

To view case service information, 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 **Case Services** link in the light-blue **Navigation** menu on the left.

The screenshot displays the Ohio SACWIS Case Overview interface. At the top, there is a navigation bar with tabs: Home, Intake, Case (highlighted with a red box), Provider, Financial, and Administration. Below this, a secondary bar contains 'Workload' (highlighted with a red box), 'Court Calendar', and 'Placement Requests'. On the left side, a light-blue navigation menu lists various options: 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 (highlighted with a red box), Legal Actions, and Legal Custody/Status. The main content area shows case details for 'Sacwis, Susie / 123456'. It includes fields for Case Name / ID, Adoption status (Open 11/21/2022), Address (123 Test Rd, Test, OH 12345), Contact information, Primary Worker (Test, Worker), and Supervisor(s) (Test, Supervisor). A 'Case Actions' section is visible at the bottom.

The **Case Services Filter Criteria** screen appears displaying the **Case Services** section beneath it.

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Viewing Current or Historical Case Services

As shown below, the screen defaults with the **Current Case Episode** radio button selected and the **Case Services** section displaying all **current** case services.

The screenshot shows the 'Case Services' section of a web application. On the left is a sidebar with a menu including 'Intake List', 'Safety Assessment', 'Substance Abuse Screening', 'Forms/Notices', 'Category/Pathway Switch', 'Safety Plan', 'Actual Risk Assessment', 'Family Assessment', 'Ongoing Case All', 'Specialized All Tool', 'Law Enforcement', 'Justification/Waiver', 'Case Services' (highlighted with a green box), 'Legal Actions', 'Legal Custody/Status', 'Living Arrangement / Guardianship', 'Initial Removal', 'Placement Request', 'Placement/CCA', 'Residential Treatment Information', 'Independent Living', 'Case Plan Tools', 'Visitation Plans', and 'Review Tools'. The main content area has two tabs: 'Case Services' (active) and 'RTIS Services'. Below the tabs is a 'Case Services Filter Criteria' section with fields for 'From Effective Date', 'To Effective Date', 'Case Member', 'Service Category', 'Service Goal', 'End-dated services' (with 'Exclude' selected), 'Status', 'Service Type', 'Service', and 'Linked Status'. There is a 'Sort Results By' dropdown and two radio buttons: 'Current Case Episode' (selected) and 'View Historical'. Below the filters are 'Filter' and 'Clear Form' buttons. The 'Case Services' section displays a table with columns: 'Service', 'Case Member Name(s)', 'Service Category / Type', 'Service Classification', 'Effective Dates', and 'Actions'. The first row shows a service for 'Sacwis, Susie' with a 'delete' link and a 'service and referrals' link. A 'Linked' status is also shown. At the bottom, there is a link for 'Case Member / Caregiver / Caretaker History'.

To view **all case services** created during any open case episode (current and past), complete the following steps:

1. Click the **View Historical** radio button
2. Click the **Filter** button.

This screenshot shows the same 'Case Services' interface as the previous one, but with the 'View Historical' radio button selected. The 'Filter' button is now highlighted with a red box. The table below the filters is empty, indicating that no historical services are currently displayed.

The **Case Services** section displays **all services** from the current and previous open case episodes.

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Viewing the Case Member / Caregiver / Caretaker History

The **Case Services** section can display a history of the service(s) linked to a case member, along with the current status of those services.

When expanded, the **Case Member / Caregiver / Caretaker History** link displays the following information (also shown below):

- All Case Members
- Caregiver / Caretaker (if applicable)
- Current Case Service Status
- Provider's Name
- Service Description
- Status Begin Date / End Date

To view the history, complete the following steps:

1. In the **Case Services** section, locate the appropriate case service.
2. Click the **Case Member / Caregiver / Caretaker History** link.

Case Services

Service: Add Case Services

Result(s) 1 to 15 of 16 / Page 1 of 2

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
edit	Sacwis, Susie	Independent Living & Transitional Living/Mentor with trained adult 1-1 meet regularly	Case Member	09/15/2022 -	delete
referrals					service end
					Linked

Case Member / Caregiver / Caretaker History

Expanded Example Showing One Case Member

Case Services

Service: Add Case Services

Result(s) 1 to 15 of 16 / Page 1 of 2

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
edit	Sacwis, Susie	Independent Living & Transitional Living/Mentor with trained adult 1-1 meet regularly	Case Member	09/15/2022 -	delete
referrals					service end
					Linked

Case Member / Caregiver / Caretaker History

	Case Member	Caregiver/Caretaker	Status	Provider	Service Description	Status Begin Date/End Date
authorize	Sacwis, Susie		PROVIDED	County Children Services Board	Mentor with trained adult 1-1 meet regularly	09/15/2022 -

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3. To close the history, click the **Case Member / Caregiver / Caretaker History** link again.

Adding a New Case Service

Complete the following steps to add a new case service for a case member:

1. Navigate to the **Case Services** section.
2. In the **Service** field, select **Case Member** from the drop-down list.

Important: You should only select **Caregiver / Caretaker** when one of the children is in placement. **To add a caregiver / caretaker service**, see the **Adding a New Caregiver / Caretaker Service** sub-section later in this Knowledge Base Article.

3. Click the **Add Case Services** button.

Case Services

Service: **Add Case Services**

Result(s) 1 to 15 of 16 / Page 1 of 2

Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates
---------------------	-------------------------	------------------------	-----------------

The **Service Information** screen appears.

4. In the **Effective Date** field, enter the appropriate date.
5. In the **Service Category** field, select the appropriate category.
6. In the **Service Type** field, select the appropriate type from the drop-down list.
7. In the **Case Member Name** field, select the appropriate name.
8. Click the **Add Status / Provider** button.

Service Information

Agency: Test County Children Services Board

Risk Contributors: None

Effective Date: *

Estimated Service End Date:

Service Category: *

Service Type: *

Member Service Status History

☒ Current Status ☐ All Statuses

Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
-------------	--------	----------	---------------------	------------------	----------------------------	------------------

Case Member Name: *


Add Status / Provider

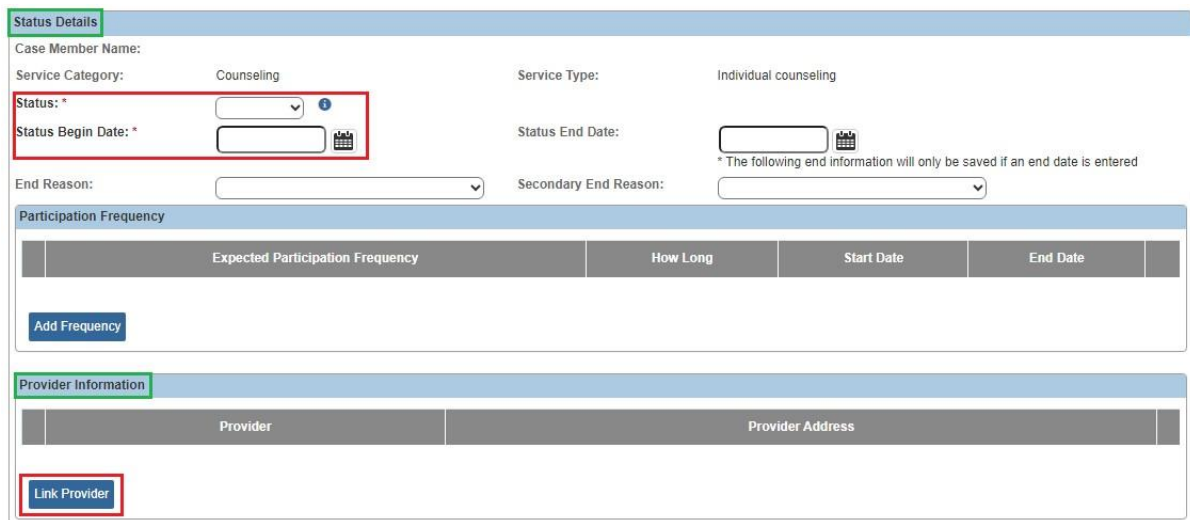
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The **Status Details** screen appears.

9. In the **Status** field, select the appropriate status from the drop-down list.
10. Select a date in the **Status Begin Date** field.

Important:

- The **Link Provider** button will only be available (enabled) if the status types of **Referred**, **Scheduled**, **Provided** are selected.
- If you hover over the  icon the system displays definitions of the four status terms as shown below.



The screenshot shows the 'Status Details' screen. At the top, there's a header 'Status Details'. Below it, 'Case Member Name:' is followed by a text field. 'Service Category:' is set to 'Counseling'. 'Service Type:' is set to 'Individual counseling'. The 'Status: *' field is a dropdown menu with an information icon (i) to its right. The 'Status Begin Date: *' field is a date picker. The 'Status End Date:' field is a date picker. Below these, 'End Reason:' and 'Secondary End Reason:' are dropdown menus. A note states: '* The following end information will only be saved if an end date is entered'. The 'Participation Frequency' section contains a table with columns: 'Expected Participation Frequency', 'How Long', 'Start Date', and 'End Date'. Below the table is an 'Add Frequency' button. The 'Provider Information' section contains a table with columns: 'Provider' and 'Provider Address'. At the bottom, there is a 'Link Provider' button.

Status Term Definitions for Icon

Needed: Based on a completed assessment of the family, service(s) have been identified.

Referred: Worker/family contacted service provider(s) to determine if provider can meet service needs of the child and/or family.

Scheduled: Worker/family contacted service provider(s) appointment scheduled.

Provided: Services received by the child/family from a provider or the agency directly.

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Adding Participation Frequency

To add a case member's participation frequency, complete the following steps:

1. If applicable, click the **Add Frequency** button on the **Status Details** screen.


The screenshot shows the 'Status Details' screen for a case member named 'Sacwis, Susie'. The 'Status' is set to 'Counseling' and the 'Service Type' is 'Individual counseling'. The 'Status Begin Date' and 'Status End Date' fields are empty. The 'End Reason' and 'Secondary End Reason' fields are also empty. Below the status details, there is a table with the following columns: 'Expected Participation Frequency', 'How Long', 'Start Date', and 'End Date'. The 'Add Frequency' button is highlighted with a red box.

The **Expected Frequency** screen appears.

2. In the **Expected Participation Frequency** field, enter the frequency into the **two** fields. In the second field, you will make a selection from the drop-down list.
3. In the **Start Date** field, enter the appropriate date.

The screenshot shows the 'Expected Frequency' screen for the same case member. The 'Expected Participation Frequency' field is highlighted with a red box and contains two input fields: a text box and a drop-down list. The 'Start Date' field is also highlighted with a red box and contains a text box and a calendar icon. The 'End Date' field is empty. The 'OK' and 'Cancel' buttons are at the bottom.

Important:

- The frequency participation date cannot be before the start date of the status record for a case member.
 - If you hover over the  icon the **Start Date** definition appears with a message saying: The **Expected Frequency Start Date** should be the date of the first schedule appointment.
 - If **One Time** is selected from the **Expected Participation Frequency** field drop-down list, the text box is not available (disabled). If any other value is selected, the text box must be populated. The text box accepts both alpha and numeric content.
4. If needed, complete the **Expected Duration** field.

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Important:

- You can return to this screen and enter the **Expected Duration** date at a later time.
- The **Expected Duration** field's values are **Days**, **Weeks**, **Months**, and **Years**.
- The **Expected Duration** field can be future dated, but it must be on or after the **Expected Participation Frequency Start** date.

5. When complete, click the **OK** button.



The screenshot shows a form titled "Expected Frequency" with a light blue header. The form contains the following fields: "Case Member Name:" with the value "Sacwis, Susie"; "DOB:" with the value "05/09/2006"; "Expected Participation Frequency: *" with a dropdown menu; "Expected Duration:" with a dropdown menu; "Start Date: *" with a date picker; and "End Date:" with a date picker. Below the form are two buttons: "OK" and "Cancel".

The **Status Details** screen appears displaying the new content in the **Participation Frequency** section.

6. To edit this record, click the **Edit** link on the left.
7. To delete this record, click the **Delete** link on the right.
8. After editing or deleting, click the **OK** button again.
9. To add another record, click the **Add Frequency** button again.



The screenshot shows a table titled "Participation Frequency" with a light blue header. The table has five columns: "Expected Participation Frequency", "How Long", "Start Date", "End Date", and an empty column. The first row of data shows "1 WEEKLY" in the first column, "09/07/2023" in the fourth column, and a "delete" link in the fifth column. Below the table is an "Add Frequency" button.

Linking a Provider

Linking a provider is **required** for the statuses of **Referred**, **Scheduled**, and **Provided** to save the record. To do so, complete the following steps:

1. On the **Status Details** screen in the **Provider Information** section, click the **Link Provider** button.

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Important:

- The **Link Provider** button will only be available (enabled) when the status types of **Referred**, **Scheduled**, and **Provided** are selected in the **Status** field.
- For a **Referred** status, multiple providers can be linked. To do so, refer to the **Linking Multiple Providers to a Referred Status** sub-section.

Provider Information	
Provider	Provider Address
<div>Link Provider</div>	

The **Provider Match Search Criteria** screen appears displaying the **Provider Information** section. Many fields are already pre-populated with data.

Important:

- If you know the **Provider ID** number, you can search by the Provider ID.
- As agencies complete Non-ODJFS merges within Ohio SACWIS, the recommending agency for most provider types will switch to ODJFS. As a result, most Non-ODJFS providers will eventually appear showing ODJFS as the recommending agency.

2. Click the **Search** button.

Search For Provider Match			
Service Category: Counseling		Service Type: Individual counseling	
Search Date: 09/07/2023		<input type="checkbox"/> With Available Vacancies	<input type="checkbox"/> Child has a kinship relationship with the provider
Available Counties: ⓘ		Selected Counties:	
<div>Test County</div> <div>Test County 2</div> <div>Test County 3</div>		<div>Remove</div>	

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Provider ID: 

Note: If Provider ID is entered, criteria such as Provider Name, Member Name, Counties, School District, and Provider Skills will be ignored

Provider Name:

OR

Member Last Name: Member First Name:

Member Middle Name:

[Child Information & Characteristics](#) ▾

[Provider Skills](#) ▾

Name Match Precision
Returns results matching entered names including AKA names/nicknames

Sort By:

Provider Name (A-Z) ▾

 + AKA/Nicknames

Fewer Results More Results

The **Provider Match Search Results** appears at the bottom of the screen.

3. To select a provider, click the **Select** link in the appropriate row.

Important:

- If your agency has not yet entered a service for this provider, please contact your Services Administrator and have them set up the service.
- To save the record, the provider must have an **active service** as of the begin date and **active status** as of current system date.

	Provider Name / ID	Provider Category	Provider Status	Current Primary Address	Current Vacancies
view	Access Ohio	NONODJFS	ACTIVE		

[View Services](#) ^

Test County Children Services Board:

[select](#) Counseling Services

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The **Status Details** screen appears displaying the **Provider Information** section now populated with information as shown below.

4. Click the **Save** button at the bottom of the screen.

Provider	Provider Address
view Access Ohio	Test Address unlink

[Link Provider](#)

Linking Multiple Providers to a Referred Status

As mentioned above, multiple providers can be linked to a **Referred** status. To do so, after linking to the first provider, complete the following steps:

1. Navigate to the **Service Information** screen using the steps above.
2. In the **Case Member Name** field, select the appropriate name.
3. Click the **Add Provider Status** button again.
4. On the **Status Details** screen, select **Referred** in the **Status** field.
5. Enter the **Status Begin Date**.

Note: The system automatically defaults the previously selected provider in the **Provider Information** section.

6. Unlink that provider (using the steps in the sub-section below).
7. Link another provider (using the steps in this sub-section).
8. Click the **Save** button. The **Service Information** screen appears displaying the multiple providers as shown below.
9. Repeat these steps as many times as needed to show all providers for the **Referred** status.

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Service Information

Agency: Test County Children Services Board
Risk Contributors: Cognitive Abilities, Caretaker's Abuse/Neglect as a Child, Caretaker's Victimization of Other Children, Emotional Functioning, Emotional/Mental Health Functioning, Parenting Practices, Substance Abuse
Effective Date: * 09/11/2023 Estimated Service End Date:
Service Category: * Counseling Service Type: * Individual counseling

Member Service Status History

☒ Current Status ☐ All Statuses

	Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit	Sacwis, Susie	Referred	Access Ohio	Counseling Services		09/11/2023	
edit	Sacwis, Susie	Referred	Counseling Ohio	Counseling Services		09/11/2023	

Case Member Name: *
Add Status / Provider

Unlinking a Provider

To unlink a provider, complete the following steps:

1. On the **Status Details** screen in the **Provider Information** section, locate the appropriate row.
2. Click the **Unlink** link on the right.

Provider Information

	Provider	Provider Address	
view	Access Ohio	Test Address	unlink

Link Provider

3. Click the **OK** button when the following warning message appears:

sacwis-uat.jfs.ohio.gov says

Are you sure you would like to unlink this record?

OK

Cancel

The **Provider Information** section appears displaying **no provider information**.

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Provider Information	
Provider	Provider Address

[Link Provider](#)

You can link a new provider following the steps in the **Linking a Provider** subsection.

Adding Service Goals

To add a service goal, complete the following steps:

1. On the **Status Details** screen, click the **Add Service Goal** button.

Provider Information	
Provider	Provider Address

[Link Provider](#)

Service Goal History	
Service Goal	Effective Date

[Add Service Goal](#)

The **Service Goal History Details** screen appears.

2. In the **Service Goal** field, select the appropriate goal from the drop-down list.
3. In the **Effective Date** field, enter the effective date. The case service effective date auto-populates, but it can be changed.
4. Click the **OK** button.

Service Goal History Details	
Service Category: Counseling	Service Type: Individual counseling
Service Goal: *	Effective Date: * 09/07/2023

[OK](#) [Cancel](#)

The **Status Details** screen appears displaying the now populated **Service Goal History** section as shown below.

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5. To edit this record, click the **Edit** link on the left.
6. To delete this record, click the **Delete** link on the right.
7. When finished editing or deleting, click the **OK** button.
8. To add another service goal record, click the **Add Service Goal** button again.

Service Goal History			
	Service Goal	Effective Date	
edit	Prevention	09/07/2023	delete
Add Service Goal			

Applying Information to Other Case Members

To apply this same information to other case members, complete the following steps:

1. On the **Status Details** screen, scroll down to the **Apply to Other Members** section.
2. Enter a check mark in the box of the applicable case member(s).
3. Click the **Save** button at the bottom of the screen.

Apply to Other Members				
	Case Member	Status	Provider	Status Begin Date/End Date
<input type="checkbox"/>	Test, Case Member			
<input type="checkbox"/>	Test, Case Member 2			
<input type="checkbox"/>	Test, Case Member 3			

[Save](#) [Cancel](#)

The **Service Information** screen appears displaying all the selected case members as shown below.

Member Service Status History							
<input checked="" type="radio"/> Current Status <input type="radio"/> All Statuses							
	Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit	Sacwis, Susie	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	
edit	Case, Member	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	
edit	Case, Member 2	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	
edit	Sacwis, Susie	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	

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Editing Individual Status Records

You can edit many aspects of a status record, such as:

- Adding, editing, or deleting a case member's participation frequency
- Unlinking a provider and linking a new provider in the current record
- Linking multiple providers to a record which has a status of Referred
- Adding, editing, or deleting new service goals
- End-dating a case status

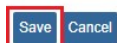
To edit a status record, complete the following steps:

1. Navigate to the case member's **Service Information** screen.
2. Click the **Edit** link next to the appropriate case member record.

Member Service Status History							
<input checked="" type="radio"/> Current Status <input type="radio"/> All Statuses							
	Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit	Sacwis, Susie	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	
edit	Case, Member	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	
edit	Case, Member 2	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	
edit	Sacwis, Susie	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	

The **Status Details** screen for that record appears.

3. To edit any of the items listed above, refer to the applicable sub-section in this Knowledge Base Article. See the Table of Contents to locate a specific topic.
4. When complete, click the **Save** button at the bottom of the screen.



The **Service Information** screen appears.

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Adding a New Case Member Service Status Record

To add a new case member service status record, complete the following steps:

1. Navigate to the **Case Services** section for that case member.
2. In the appropriate row, click the **Edit** link (on the left of the grid).

The screenshot shows the 'Case Services' section. At the top, there is a 'Service:' dropdown menu and an 'Add Case Services' button. Below this, it says 'Result(s) 1 to 15 of 17 / Page 1 of 2'. A table with the following columns is displayed: Case Member Name(s), Service Category / Type, Service Classification, Effective Dates, and a set of action links. The first row contains 'Sacwis, Susie', 'Independent Living & Transitional Living/Mentor with trained adult 1-1 meet regularly', 'Case Member', and '09/15/2022 -'. The action links for this row are 'edit' (highlighted with a red box), 'referrals', 'delete', 'service_end', and 'Linked'. At the bottom, there is a link for 'Case Member / Caregiver / Caretaker History'.

The **Service Information** screen appears.

3. In the **Case Member Name** field (near the bottom), select the appropriate name.
4. Click the **Add Status / Provider** button.

The screenshot shows the 'Member Service Status History' section. At the top, there is a 'Member Service Status History' header and two radio buttons: 'Current Status' (selected) and 'All Statuses'. Below this is a table with the following columns: Case Member, Status, Provider, Service Description, Provider Address, Status Begin Date/End Date, and Created in Error. The first row contains 'Sacwis, Susie', 'Provided', 'Test County Children Services Board', 'Mentor with trained adult 1-1 meet regularly', and '09/15/2022'. The action links for this row are 'edit' and 'authorize'. At the bottom, there is a 'Case Member Name: *' dropdown menu and an 'Add Status / Provider' button (highlighted with a red box).

The **Status Details** screen appears.

5. In the **Status** field, select the new case status from the drop-down list.

Note: You can have multiple **Referred** statuses at the same time.

6. In the **Status Begin Date** field, enter the appropriate date.
7. To link a provider, follow the steps in the **Linking a Provider** sub-section of this Knowledge Base Article.

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Status Details

Case Member Name:

Service Category: Counseling

Service Type: Individual counseling

Status: *

Status Begin Date: *

Status End Date:

End Reason:

Secondary End Reason:

Participation Frequency

Expected Participation Frequency	How Long	Start Date	End Date
Add Frequency			

Provider Information

Provider	Provider Address
Link Provider	

- On the **Status Details** screen, update the following sections (as needed) using the steps previously discussed in this Knowledge Base Article:
 - Participation Frequency (**Adding Participation Frequency** sub-section)
 - Service Goal History (**Adding Service Goals** sub-section)
 - Apply to Other Members (**Applying Information to Other Case Members** sub-section)

- When complete, click the **Save** button at the bottom of the screen. The **Service Information** screen appears.

Important: Upon save, the system populates the status end date of the previous non-end dated status record using the status begin date.

- On the **Member Service Status History** screen, if you click the **All Statuses** radio button, you will see all status records for the case service.

Member Service Status History							
<input checked="" type="radio"/> Current Status <input type="radio"/> All Statuses							
	Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit	Sacwis, Susie	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	
edit	Case, Member	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	
edit	Case, Member 2	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	
edit	Sacwis, Susie	Referred	Access Ohio	Counseling Services	Test Address	09/07/2023	

Adding a New Caregiver / Caretaker Service

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You should only select **Caregiver / Caretaker** when one of the children is in placement. To add a new service, complete the following steps:

1. Navigate to the **Case Services** section for that case member.
2. In the **Service** field, select **Caregiver / Caretaker** from the drop-down list.
3. Click the **Add Case Services** button.

Case Services

Service: Add Case Services

Result(s) 1 to 15 of 16 / Page 1 of 2

Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates
---------------------	-------------------------	------------------------	-----------------

The **Service Information** screen appears.

4. In the **Effective Date** field, enter the appropriate date.
5. In the **Service Category** field, select the appropriate category.
6. In the **Service Type** field, select the appropriate type from the drop-down list.
7. In the **Case Member Name** field, select the appropriate name.

Important: The case member displays along with his / her current provider and **will only display** if the child is / was in placement on the effective date of the service.

8. Click the **Add Status / Provider** button.

Service Information

Agency: Test County Children Services Board

Risk Contributors: None

Effective Date:

Estimated Service End Date:

Service Category:

Service Type:

Member Service Status History

☒ Current Status ☐ All Statuses

Case Member	Caregiver/Caretaker	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
-------------	---------------------	--------	----------	---------------------	------------------	----------------------------	------------------

Case Member / Caregiver/ Caretaker: Add Status / Provider

The **Status Details** screen appears.

9. To finish adding a caregiver service, complete the steps as discussed in the **Adding a New Case Service** sub-section. Begin with the step where the

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Status Details screen appears. (The steps for adding a case member or a caregiver / caretaker are the same from that point on.)

10. Next, complete the steps in the following sub-sections as previously discussed in this Knowledge Base Article:

- **Linking a Provider** (required for **Referred**, **Scheduled**, and **Provided** statuses)
- **Adding Participation Frequency** (if needed)
- **Adding Service Goals** (if needed)
- **Applying Information to Other Members** (children in placement) (if needed)

11. When complete, click the **Save** button at the bottom of the **Status Details** screen. The **Service Information** screen appears.

12. Click the **Save** button again.



The **Case Services** screen appears displaying the new caregiver / caretaker record.

edit	Sacwis, Susie	Counseling/Individual counseling	Caregiver/Caretaker	09/07/2023 -	delete
referrals					service end
					Not Linked
Case Member / Caregiver / Caretaker History					

13. If needed, click the **Case Member / Caregiver Caretaker History** link for that row to expand the box and view historical details.

Case Services

Service:

Add Case Services

Result(s) 1 to 15 of 16 / Page 1 of 2

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
edit	Sacwis, Susie	Independent Living & Transitional Living/Mentor with trained adult 1-1 meet regularly	Case Member	09/15/2022 -	delete
referrals					service end
					Linked
<div><div></div> Case Member / Caregiver / Caretaker History</div>					

Managing Case Services

Marking a Status Record as Created in Error

To mark a status record as created in error, complete the following steps:

1. On the **Case Services** screen for that case member, click the **Edit** link in the appropriate row.

The screenshot shows the 'Case Services' interface. At the top, there's a 'Service:' dropdown and an 'Add Case Services' button. Below this, it says 'Result(s) 1 to 15 of 17 / Page 1 of 2'. A table lists case services. The first row is for 'Sacwis, Susie' with service category 'Independent Living & Transitional Living/Mentor with trained adult 1-1 meet regularly', classification 'Case Member', and effective dates '09/15/2022 -'. In the first column of this row, the word 'edit' is highlighted with a red box. Other links like 'delete', 'service end', 'referrals', and 'Linked' are also visible. At the bottom, there's a link for 'Case Member / Caregiver / Caretaker History'.

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
edit	Sacwis, Susie	Independent Living & Transitional Living/Mentor with trained adult 1-1 meet regularly	Case Member	09/15/2022 -	delete service end referrals Linked

The **Service Information** screen appears.

2. In the **Member Service Status History** section, click the appropriate **Edit** link.

The screenshot shows the 'Service Information' screen. It includes fields for 'Agency' (Test County Children Services Board), 'Risk Contributors' (Emotional Functioning), 'Effective Date' (02/03/2023), 'Estimated Service End Date', 'Service Category' (Independent Living & Transitional Living), and 'Service Type' (Opening and using a checking/savings). Below this is the 'Member Service Status History' section. It has radio buttons for 'Current Status' (selected) and 'All Statuses'. A table lists status history. The first row is for 'Sacwis, Susie' with status 'Provided', provider 'Test County Children Services Board', service description 'Opening and using a checking/savings account', and status begin/end date '02/03/2023'. In the first column of this row, the word 'edit' is highlighted with a red box. Other links like 'authorize' are also visible. At the bottom, there's a 'Case Member Name' dropdown and an 'Add Status / Provider' button.

	Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit	Sacwis, Susie	Provided	Test County Children Services Board	Opening and using a checking/savings account		02/03/2023	

The **Status Details** screen appears.

3. Scroll down and click the **Created in Error** check box (located below the **Comments** field).

The screenshot shows the 'Status Details' screen. It features a 'Comments:' label above a large text input field. Below the input field, there are buttons for 'Spell Check', 'Clear', and a character count '4000'. At the bottom, there is a checkbox labeled 'Created in Error', which is highlighted with a red box.

Managing Case Services

- Click the **Save** button at the bottom of the screen.

The **Service Information** screen appears with that record removed from the **Member Service Status History** section.

The **Current Status** radio button defaults to show only the current status for all case members created in that service.

- To see all **Created in Error** entries, click the **All Statuses** radio button.

Service Information

Agency: Test County Children Services Board
 Risk Contributors: Emotional Functioning

Effective Date: * 02/03/2023 Estimated Service End Date:
 Service Category: * Independent Living & Transitional Living Service Type: * Opening and using a checking/savings

Member Service Status History

☒ Current Status ☐ All Statuses

	Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit authorize	Sacwis, Susie	Provided	Test County Children Services Board	Opening and using a checking/savings account		02/03/2023	

Case Member Name: * [Add Status / Provider](#)

All the case members appear in the **Member Service Status History** section. The **Created in Error** entries for that service have a **Yes** in the **Created in Error** column.

End-Dating a Case Service

To end date a case service, complete the following steps:

- On the **Case Services** screen for the case member, locate the appropriate row.
- Click the **Service End** link (on the right).

Case Services

Service: [Add Case Services](#)

Result(s) 1 to 15 of 16 / Page 1 of 2

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
edit referrals	Sacwis, Susie	Independent Living & Transitional Living/Mentor with trained adult 1-1 meet regularly	Case Member	09/15/2022 -	delete service end Linked

The **Service End Details** screen appears.

Managing Case Services

3. Enter a date in the **End Date** field.

Important: If **multiple case members** are on a service, the system will end date the case service, as well as the current status record for all case members (if it has no existing end date).

4. Select a reason from the **End Reason** field drop-down list.
5. Click the **Save** button at the bottom of the screen.

Service End Details

Service Category:

Independent Living & Transitional Living

Service Type:

Opening and using a checking/savings account

End Date:

End Reason:

Secondary End Reason:

Additional Comments:

Spell Check

Clear

2000

Member Service Status History

Case Service Member / DOB	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date
Sacwis, Susie	Provided	Test County Children Services Board	Opening and using a checking/savings account		02/03/2023 -

Save

Cancel

As shown below, the **Case Services** screen appears displaying the record with an end date in the **Effective Dates** column. Additionally, the system displays a **View** link on the left, rather than the **Edit** link that previously appeared.

edit	Sacwis, Susie	Independent Living & Transitional Living/Mentor with trained adult 1-1 meet regularly	Case Member	09/15/2022 - 09/07/2023	service end
referrals					Linked
Case Member / Caregiver / Caretaker History					

End-Dating a Case Service Member Status Record

Managing Case Services

To end date a case service member status record, complete the following steps:

Note: When you end date a case service, Ohio SACWIS automatically end dates the case service member status record (if it has no existing end date) for all case members. The steps in this sub-section assume that the case service is continuing and only the case service member status is ending.

1. On the **Case Services** screen for the case member, locate the appropriate row.
2. Click the **Edit** link.

Case Services

Service: **Add Case Services**

Result(s) 1 to 15 of 17 / Page 1 of 2

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
edit	Sacwis, Susie	Independent Living & Transitional Living/Mentor with trained adult 1-1 meet regularly	Case Member	09/15/2022 -	delete service end Linked
referrals					

☐ Case Member / Caregiver / Caretaker History

The **Service Information** screen appears.

3. Click the appropriate **Edit** link in the **Member Service Status History** section.

Service Information

Agency: Test County Children Services Board

Risk Contributors: Emotional Functioning

Effective Date: * Estimated Service End Date:

Service Category: * Service Type: *

Member Service Status History

☒ Current Status ☐ All Statuses

	Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit	Sacwis, Susie	Provided	Test County Children Services Board	Opening and using a checking/savings account		02/03/2023	
authorize							

Case Member Name: * **Add Status / Provider**

The **Status Details** screen appears.

4. In the **Status End Date** field, enter the status end date.
5. In the **End Reason** field, select an end reason from the drop-down list.
6. Click the **Save** button at the bottom of the screen.

Managing Case Services

Status Details

Case Member Name: Sacwis, Susie
Service Category: Counseling
Service Type: Family Counseling
Status: * Scheduled ⓘ
Status Begin Date: * 09/05/2023 ⓘ
Status End Date: ⓘ ⓘ
End Reason: ⓘ
Secondary End Reason: ⓘ
Participation Frequency

* The following end information will only be saved if an end date is entered

Save **Cancel**

The **Service Information** screen appears displaying the end date in the **Status Begin Date / End Date** column.

7. Click the **Save** button again to save the record.

Service Information

Agency: Test County Children Services Board
Risk Contributors: Emotional Functioning
Effective Date: * 09/05/2023
Estimated Service End Date: ⓘ ⓘ
Service Category: * Counseling
Service Type: * Family Counseling

Member Service Status History

☒ Current Status ☐ All Statuses

Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit Sacwis, Susie	Scheduled		Family Counseling		09/05/2023 - 09/07/2023	

Case Member Name: * ⓘ **Add Status / Provider**

The **Case Services** screen appears.

Completing a Service Review

This sub-section discusses completing a service review that is done outside of a case review.

1. On the **Case Services** screen for the case member, locate the appropriate row.
2. Click the **Edit** link.

Managing Case Services

Case Services

Service: [Add Case Services](#)

Result(s) 1 to 15 of 17 / Page 1 of 2

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
edit	Sacwis, Susie	Independent Living & Transitional Living/Mentor with trained adult 1-1 meet regularly	Case Member	09/15/2022 -	delete service end Linked
referrals					
<input checked="" type="checkbox"/> Case Member / Caregiver / Caretaker History					

The **Service Information** screen appears.

3. Click the **Service Review** tab.

Important: From this tab, you can **edit a current** service review or **add a new** service review.

4. To edit an existing service review, click the **Edit** link in the appropriate row.
5. To add a service review, click the **Add Service Review** button.

Service Information **Service Review** **Service Activity**

CASE NAME / ID: Sacwis, Susie / 123456 *Ongoing / Open (06/17/2022)*

Service Category: Counseling Service Type: Family Counseling

Service Review [Expand All](#)

Case Member(s) / DOB	Review Date
Add Service Review	

The **Service / Activity Review Details** screen appears.

6. In the **Review Date** field, select the appropriate date. This field defaults to the current date.
7. Select the check box next to the appropriate case member(s) name.

Managing Case Services

Important:

- If all the case members need to be selected, click the check box in the header to select all.
 - More than one case member can be selected.
8. In the **Service Recommendation** column, choose from the drop-down list. The choices are **Continue**, **Modify**, or **Terminate**.
 9. In the **Barrier Type** column, select the appropriate barrier.
 10. If needed, type a recommendation into the **Recommendation Comments** field. **If barriers exist, this field is required.**
 11. Click the **Save** button.

Service/Activity Review Details

Review Information

Review Date: *

09/08/2023

	Case Member(s) / DOB	Service Recommendation	Participation Status	Barrier Type
<input checked="" type="checkbox"/>	Sacwis, Susie			

Recommendation Comments:

Spell Check

Clear

2000

Participation Comments:

Spell Check

Clear

2000

Barrier Comments:

Spell Check

Clear

2000

Save

Cancel

The **Service Review** screen appears displaying the new record.

Service Review			
			Expand All
	Case Member(s) / DOB	Review Date	
edit view	Sacwis, Susie	09/08/2023	delete
Service Review Details			

Managing Case Services

12. If needed, click the **Delete** link to delete the current record.
13. When this warning message appears, click the **OK** button.
- 14.

sacwis-uat.jfs.ohio.gov says

To delete this service review record, click OK.

OK

Cancel

15. If needed, click the **View** or **Edit** links to view or further edit the content.

Service Review			
		Expand All	
	Case Member(s) / DOB	Review Date	
edit view	Sacwis, Susie	09/08/2023	delete
Service Review Details			

16. Click the **Save** button at the bottom of the screen.

Apply **Save** Cancel

The **Case Services** screen appears.

Adding a Service Activity Record

At a minimum, a **service activity (participation status)** is required to be added **once during every case review period**. To do so, complete the following steps:

1. On the **Case Services** screen for the case member, locate the appropriate row.
2. Click the **Edit** link.

Managing Case Services

Case Services

Service: [Add Case Services](#)

Result(s) 1 to 15 of 17 / Page 1 of 2

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
edit	Sacwis, Susie	Independent Living & Transitional Living/Mentor with trained adult 1-1 meet regularly	Case Member	09/15/2022 -	delete service end Linked
referrals					
Case Member / Caregiver / Caretaker History					

The **Service Information** screen appears.

- Click the **Service Activity** tab. The **Service Activity Filter Criteria** screen appears displaying the **Service Activity Results** section below.
- In the **Case Service Participant** field (near the bottom), select the appropriate name from the drop-down list (only available for **Scheduled** or **Provided** status records).
- In the **Activity Start Date** field, enter the appropriate date.
- Click the **Add Service Activity** button.

Service Information | **Service Review** | **Service Activity**

CASE NAME / ID: Sacwis, Susie Ongoing / Open (06/17/2022)

Service Category: Counseling | Service Type: Family Counseling

Service Activity Filter Criteria

Case Service Participant:

Activity From Date:

Activity To Date:

[Filter](#)

Service Activity Results

Result(s) 0 / Page 0 of 0

Case Service Participant*: Activity Start Date*: [Add Service Activity](#)

The **Add Service Activity** screen appears displaying a calendar as shown below.

Important: Since May 1st was selected in the **Activity Start Date** field on the previous screen, the calendar only displays from that start date to the current date. The other dates are grayed out. The calendar only displays a maximum of 90 days.

- In the **Participation Status** field, select the appropriate choice from the drop-down list. The choices are **Attended All**, **Partial Attendance**, and **Not Attended**.

Managing Case Services

Important:

- The participation status must be added once during every case review period.
- Completing the **Participation Status** field is required to save the record; completing the calendar is not.

8. If needed, for each enabled calendar day in the **Calendar** section, select **Attended** or **Not Attended** from the drop-down list.

Add Service Activity

Case Service Participant: Sacwis, Susie

Activity Start Date: 09/08/2023

Participation Status:

Activity End Date:

Comments:

September 2023

Sun	Mon	Tue	Wed	Thur	Fri	Sat
					1	2
3	4	5	6	7	8 Attended	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Apply Save Cancel

Important: You can also apply this information to other case members within that service by completing these steps:

9. Scroll to the **Apply Other Members** section (below the calendar).
10. Select the appropriate case member check box(es).
11. Click the **Save** button.

Apply Save Cancel

The **Service Activity Filter Criteria** screen appears displaying the **Service Activity Results** section below it. The selected case member(s) now have a new service activity record as shown below.

Managing Case Services

The screenshot shows a web interface for managing case services. At the top, there is a 'Service Activity Filter Criteria' section with a dropdown for 'Case Service Participant', input fields for 'Activity From Date' and 'Activity To Date' (each with a calendar icon), and a 'Filter' button. Below this is the 'Service Activity Results' section, which displays a table of results. The table has columns for 'Activity Start Date', 'Activity End Date', and 'Case Service Participant'. A single record is shown with start and end dates of 09/08/2023 and participant 'Sacwis, Susie'. There are 'edit' and 'delete' links for this record. At the bottom, there is a section for adding a new service activity, including a 'Case Service Participant*' dropdown, an 'Activity Start Date:*' input with a calendar icon, and an 'Add Service Activity' button.

Activity Start Date	Activity End Date	Case Service Participant
09/08/2023	09/08/2023	Sacwis, Susie

From this screen:

12. To edit a record, click the **Edit** link on the left. After editing the record, click the **OK** button again.
13. To delete a record, click the **Delete** link on the right. Then, click the **OK** button.

Filtering Service Activity Records

To filter the service activity records by **case member** or **activity from and to date**, complete the following steps:

1. Navigate to the **Service Activity** tab (steps discussed previously).
2. At the top of the screen, select the case member's name from the **Case Service Participant** field drop-down list.
3. In the **Activity From Date** field, enter the appropriate date.
4. In the **Activity To Date** field, enter the appropriate date.
5. Click the **Filter** button.

Managing Case Services

The screenshot shows the 'Service Activity Filter Criteria' section with a dropdown for 'Case Service Participant', input fields for 'Activity From Date' and 'Activity To Date', and a 'Filter' button. Below this is the 'Service Activity Results' section, which displays a table with one result. The table has columns for 'Activity Start Date', 'Activity End Date', and 'Case Service Participant'. The result shows a start date of 09/08/2023, an end date of 09/08/2023, and a participant named 'Sacwis, Susie'. There are 'edit' and 'delete' links for this result. At the bottom, there is a form to 'Add Service Activity' with a dropdown for 'Case Service Participant*', an input for 'Activity Start Date:', and an 'Add Service Activity' button.

Activity Start Date	Activity End Date	Case Service Participant
09/08/2023	09/08/2023	Sacwis, Susie

The filtered results appear in the **Service Activity Results** section as shown above.

6. If needed, click the **Cancel** button to return to the **Case Services** screen.

Linking a Case Service to a Work Item

You can link a case service to a work item in Ohio SACWIS. Although case service functionality in some parts of the system have changed, **the current steps for linking a case service are still the same as they were in previous versions of Ohio SACWIS.**

You can also link a case service for one member, or many members as shown below.

Example: If you navigate to the **Case Services** screen through a work item to link case services, you can select every case member for this service by following these steps.

1. On the **Case Services** screen locate the appropriate row for the case service you want to link.
2. Click the **Edit** link.

Managing Case Services

Case Services

Service:

Add Case Services

Result(s) 1 to 15 of 17 / Page 1 of 2

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
<div>edit</div> <div>referrals</div>	Sacwis, Susie	Independent Living & Transitional Living/Mentor with trained adult 1-1 meet regularly	Case Member	09/15/2022 -	<div>delete</div> <div>service end</div> <div>Linked</div>

Case Member / Caregiver / Caretaker History

The **Service Information** screen appears.

- Click the appropriate **Edit** link in the **Member Service Status History** section.

Service Information

Agency: Test County Children Services Board
Risk Contributors: Emotional Functioning

Effective Date: *

02/03/2023

Estimated Service End Date:

Service Category: *

Independent Living & Transitional Living

Service Type: *

Opening and using a checking/savings

Member Service Status History

Current Status

All Statuses

	Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
<div>edit</div> <div>authorize</div>	Sacwis, Susie	Provided	Test County Children Services Board	Opening and using a checking/savings account		02/03/2023	

Case Member Name: *

Add Status / Provider

The **Status Details** screen appears.

- Scroll to the bottom on the page. Select which members need added to the **Case Service** by checking the checkbox next to the appropriate names.
- Click the **Save** button.

Apply to Other Members

	Case Member	Status	Provider	Status Begin Date/End Date
<div></div>	Sacwis, Susie			
<div></div>	Test, Case Member 1			
<div></div>	Test, Case Member 2			
<div></div>	Test, Case Member 3			
<div></div>				

Managing Case Services

The **Service Information** screen appears showing the saved Members within the Member Service Status History grid.

Service Information

Agency: Test County Children Services Board
Risk Contributors: Emotional Functioning
Effective Date: * 04/05/2023
Estimated Service End Date:
Service Category: * Case Management
Service Type: * Family Search and Engagement

Member Service Status History

☒ Current Status ☐ All Statuses

	Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit	Sacwis, Susie	Needed				04/05/2023	
edit	Test, Case Member 1	Needed				04/05/2023	
edit	Test, Case Member 2	Needed				04/05/2023	
edit	Test, Case Member 3	Needed				04/05/2023	
edit	Test, Case Member 4	Needed				04/05/2023	

6. Click the **Save** button.

The **Case Services** screen appears showing the saved members.

Case Services

Service:

Result(s) 1 to 9 of 9 / Page 1 of 1

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
edit referrals	Sacwis, Susie	Employment/Job Placement	Case Member	09/08/2023 -	delete service end Not Linked
<input checked="" type="checkbox"/> Case Member / Caregiver / Caretaker History					
edit referrals	Sacwis, Susie, Test, Member 1, Test, Member 2, Test, Member 3	Case Management/Family Search and Engagement	Case Member	04/05/2023 -	delete service end Not Linked
<input checked="" type="checkbox"/> Case Member / Caregiver / Caretaker History					

As shown above, the screen displays **all the case members**.

If you expand the **Case Member / Caregiver / Caretaker History** link, the screen displays the selected member (or members) and their status for the Case Service as shown below:

