Ohio **SACWIS**

Student Guide for Managers

Module 1
Introduction

What you'll do

Welcome to the training for Ohio SACWIS!

This module contains the ground rules for training classes, a list of the learning aids for the system, and the agenda for the next two days of training.

You will:

- Review the ground rules for the class and training facilities
- Review the various types of learning aids for SACWIS training
- Review the agenda for training
- Introduce yourself

Presentation
Housekeeping

Ground rules

- Participate fully in all training activities

- Work together to support each other

- Return on time from breaks and lunch

- Turn off cell phones and pagers during class, or put on vibrate

- Use computers only for training activities

- Do *not* use the computers to email, print, surf the web, and so on

Facilities

- Restrooms

- Break room

- Exits

- Designated smoking areas (smoking is permitted only in these areas)

- Chair and table adjustments

Presentation
Learning Aids

The learning aids listed below will help you learn the basic functions of Ohio SACWIS. These aids will also be quick references when you start using the system as part of your job.

Materials

- Student Guide

- User Guide

- Job aids

Online help

- The help and training header link

- The Help link on a screen

Presentation
Agenda: Day 1

Note

You won't learn everything you need to know about SACWIS during these two days of training. This course is meant only to get you started. But don't worry—you'll receive assistance on the job.

Hour	Lesson
	Introduction
	Overview
	15-minute break
	Basic Navigation
	Finding Information
	Questions and answers (optional)
	1-hour lunch
	Staff Administration
	15-minute break
	Reports
	Review
	Questions, answers, and discussion

Activity
Introductions

Everyone in the class will introduce themselves. Be prepared to
provide the following information:

■ Your name

■ Where you work

■ Your primary job role

Module 2
Overview

What you'll do

By now you probably know something about Ohio SACWIS. This module summarizes the key functions of the system, its purpose, and its benefits.

You will learn:

- What Ohio SACWIS is
- The purpose and benefits of Ohio SACWIS
- How Ohio SACWIS will support your job

Presentation
Overview

Notes

Welcome to
Ohio SACWIS!

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What is Ohio SACWIS?

▷ SACWIS = Statewide Automated Child Welfare Information System

▷ Administered by:
  ▷ Ohio Department of Job and Family Services (ODJFS)
  ▷ In partnership with the state's 88 Public Children Services Agencies (PCSAs)

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Purpose and Goal of Ohio SACWIS

Purpose:
❯ Ohio SACWIS is a comprehensive case management tool for managing all child welfare activities
Goal:
❯ Immediate access
❯ Sharing information
❯ Manage caseloads
❯ Maintain accurate data
❯ Effective decision making

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Presentation
Overview, continued

Notes

Benefits of Ohio SACWIS

OhioSACWIS

> Quick access to the most current information
> Reduces paperwork
> View records statewide
> Helps workload management
> Reduces repetitive typing

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Benefits of Ohio SACWIS (continued)

OhioSACWIS

> Data analysis and reporting tools
> Complies with federal, state, and agency reporting requirements

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Benefits of Ohio SACWIS (continued)

OhioSACWIS

> Makes information in SACWIS available to users anywhere in Ohio

> Interfaces with CRIS-E, SETS, and MMIS

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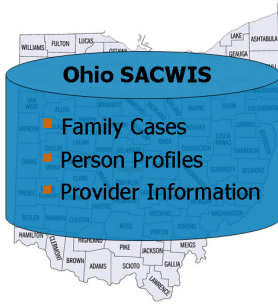# Presentation
Overview, continued

Notes

Ohio SACWIS and Your Job

- Ohio SACWIS is a task-based system:
  - The flow of information within the system reflects the way you do your work
  - The system is organized around major functional areas:
    1. Intake
    2. Case management
    3. Provider management
    4. Financial management
    5. Administration

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Basic Information Types

Ohio SACWIS
- Family Cases
- Person Profiles
- Provider Information

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Family Cases

- Family Cases
  - Contains all the work related to a SACWIS family, as defined by participation in a case record.
  - Includes related work such as:
    - Case plans
    - Family assessments
    - Placement activities
    - Case services
    - Court-related work

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Presentation
Overview, continued

Notes

Person Profiles

❯ Person Profile
- Records all relevant information about a person in one place
- Records each person's relationships to other individuals as well as to providers and cases
- Persons include:
    - Case participants
    - Agency staff
    - Providers
    - Other involved persons
    - Reporters/referents
- Person profile exception
    - Contact person in some situations

OhioSACWIS

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Providers

❯ Provider
- SACWIS is used to manage information for providers throughout Ohio
- Every provider has its own record (both home providers licensed by ODJFS and non-ODJFS providers), which contains:
    - Contact information
    - Skills
    - Certifications
    - Training records

OhioSACWIS

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SACWIS Overview: Intake

Contact to agency

Intake Management

OhioSACWIS

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Presentation
Overview, continued

Notes

SACWIS Overview: Case Mgmt.

SACWIS Overview: Court Processing

SACWIS Overview: Provider Mgmt.

Presentation
Overview, continued

Notes

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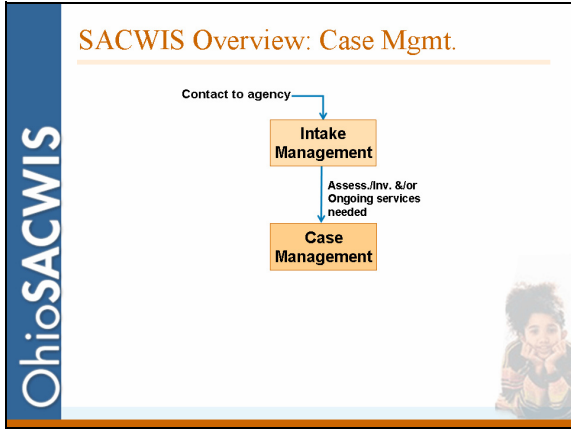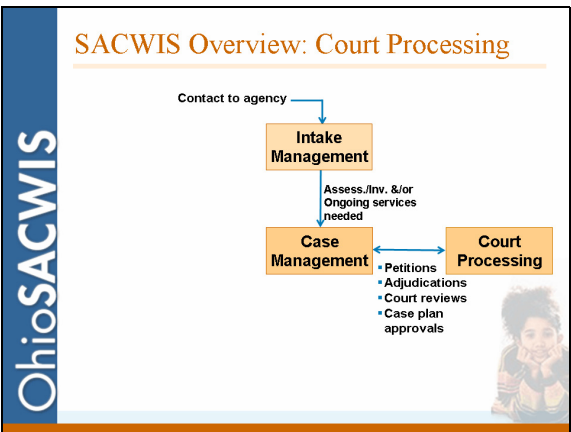
Review
Overview

The instructor will lead you through these review questions.

1. Name three of the five functional areas of Ohio SACWIS

2. What are the three main types of information in Ohio SACWIS?
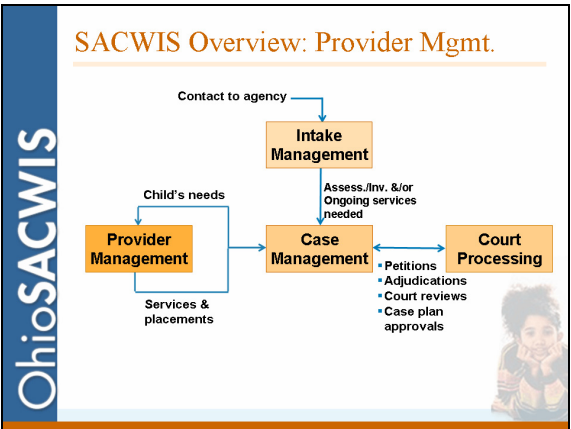
3. What are some of the benefits we talked about?

Module 3
Basic Navigation

What you'll do

Now that you've been introduced to Ohio SACWIS, it's time to see the application first-hand! In this module, the instructor will introduce Ohio SACWIS and its "user interface," that is, how you interact with the screens and elements in the system.

You will:

- Review the elements of PC applications
- See how the screens of the system are laid out
- Learn how to navigate through the system
- Learn how to use filter and search screens
- Learn how to use online support tools
- Review

Guided walkthrough
Opening Ohio SACWIS

First, we'll review the basics.

Ohio SACWIS is an application that you use on your PC, much like any other PC program. While many PC applications run within Microsoft Windows, Ohio SACWIS is a *Web-based* application—it operates from within a Web browser. Internet Explorer, Netscape, and Firefox are commonly used web browsers. Internet Explorer is the preferred browser for Ohio SACWIS.

The instructor has already launched Ohio SACWIS on your PC. Maximize it from the status bar.
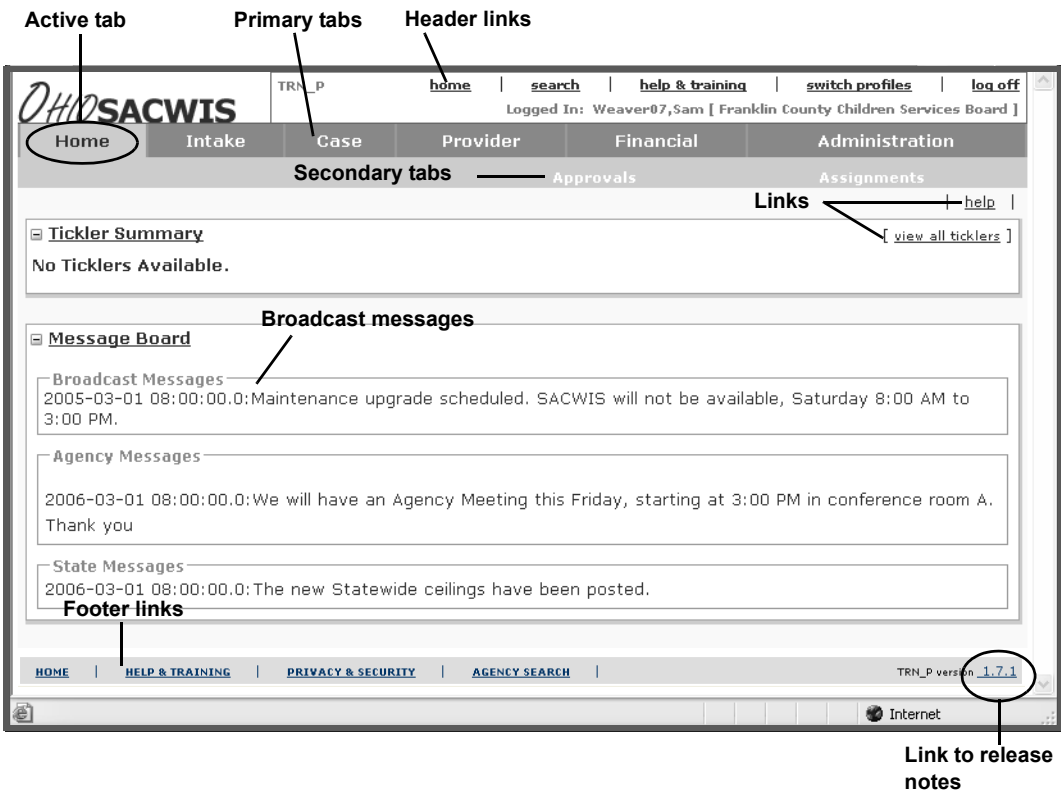
Follow along with the instructor.

Guided walkthrough
Home screen

After you log on to Ohio SACWIS, the next screen you come to is the Home screen. It is the first main tab.

Let's take a look at the elements visible from the Home screen.

Guided walkthrough
Home screen, cont.

Things to remember about the Home Screen:

- Appears after you log in
- Displays escalated ticklers and broadcast messages
- Displays all the primary tabs
- You can return to it at any time by clicking the **home** header link

These are elements that appear throughout the system:

Types of fields	Notes
Header links	Always appear at the top of the screen. You can click on them from anywhere in the system.
Footer links	Always appear at the bottom of the screen. You can click on them from anywhere in the system.
Primary tabs	Reflect the main functional work areas.
Secondary tabs	Further define the work tasks for the functional area. Tabs also appear within task areas to organize information.
Links	Open another screen that is linked to the current screen. Expanding links display more information on the current screen.

Guided walkthrough
Ticklers

You can view ticklers from the Home screen. There are two types of ticklers:

- **System-generated ticklers**. These are created as a result of an activity. For example, the due date of an assessment is generated when a report is screened in. The system automatically "disposes," or closes, a tickler when the action is completed.

   The color of the link, and the number of feathers, indicate the urgency of a tickler:

Three red feathers	Today's date is past the due date.
Two gold feathers	Today's date is past the first escalation date, but before the due date.
One green feather	Today's date is before the first escalation date.

- **Ad hoc ticklers**. These are ones you create yourself to remind yourself of something. The system does not escalate or close ad hoc ticklers.

Viewing all ticklers

From the Home screen, click the view all ticklers link.

Notice that this screen organizes ticklers by functional area. Each link is an expanding link, which displays details on the current screen.

Guided walkthrough
Ad hoc ticklers

An ad hoc tickler is not system generated. It is one you create yourself as a reminder to do something. You can create an ad hoc tickler for any reason.

Let's create an ad hoc tickler now.

1. From the Ticklers screen, click the **Add Ad Hoc Tickler** button. The Ad Hoc Tickler detail screen appears.

2. Complete the following fields with the data shown:

Field Name	Enter/Select	Notes
Display Date	(Today's date)	This is the date the tickler appears.
Due Date	(One week from today)	This is the date by which the action should be taken.
Status	Open	This is the default.
Category	(Your option)	
Message	(A short narrative)	This describes the action to be taken.

When you take action on or wish to close an ad hoc tickler, you open the tickler record and enter a date in the **Completion Date** field.

3. Click **Save**. You are returned to the originating screen, in this case, the Ticklers screen.

4. Open the list of ad hoc ticklers and locate the tickler you just added.

Guided walkthrough
Workload screens

1. Click the **Case** primary tab, then click the **Workload** secondary tab. This displays the Case Workload screen.

2. Click on **Weaver##, Sam**. This lists Sam's cases.

Things to remember about a workload screens:

■ They provide workers easy access to the intake, case, or provider records assigned to them.

■ For a supervisor, they list the workers in his or her unit and the cases assigned to each worker.

Guided walkthrough
Overview screens

From the Case Workload screen, click the case ID link for Stone (CM)##, Wilma.

Things to remember about an overview screen:

- It displays a summary of the case or provider record.

- It is the starting point for viewing or updating the record.

- It displays links on the left, which open various work items and records associated with this case or provider.

Guided walkthrough
List screens

Click the **Activity Log** link in the menu on the left. When you click the links in the menu on the left, you often open a filter, or list, screen.

Things to remember about list screens:

- The top part of the list screen has a section for filter criteria.
- The bottom part of the list screen lists the records that meet your filter criteria.

Header

Select Assessment/ Investigation in the Case Category field.

Select Interviews in the Contact Type field.

Then click the Filter button.

Each row in the table is a record.

The view or edit link opens the details of the record.

Enter filter

Records appear in

Guided walkthrough
Detail screens

Note

The system applies information from one record to another, when it applies. For example, it automatically links a face-to-face interview activity to the safety assessment.

1. Click the **edit** link next to the first record. This opens a detail screen, which displays the details of a particular record.

Things to remember about a detail screen:

- It contains the fields that complete the record.
- The required fields are necessary to save a record.

Required field

Guided walkthrough
Online support tools

You don't have to remember everything from this training class! In addition to the User Guide that you are given, Ohio SACWIS includes online support tools that will help you use the system when you are back at work.

These support tools include:

- Context-sensitive screen help
- Task-based help
- Glossary
- Web-based training
- Web-based FCASM

Guided walkthrough
Online help, screen help

Online help is like a big user manual, but instead of being printed on paper, it's online. When you launch it, it appears in another browser window, which sits on top of the Ohio SACWIS application.

1. Click the **help** link on the Activity Log Details list screen.

2. Notice the elements of the screen help topic.

3. Close the help window.
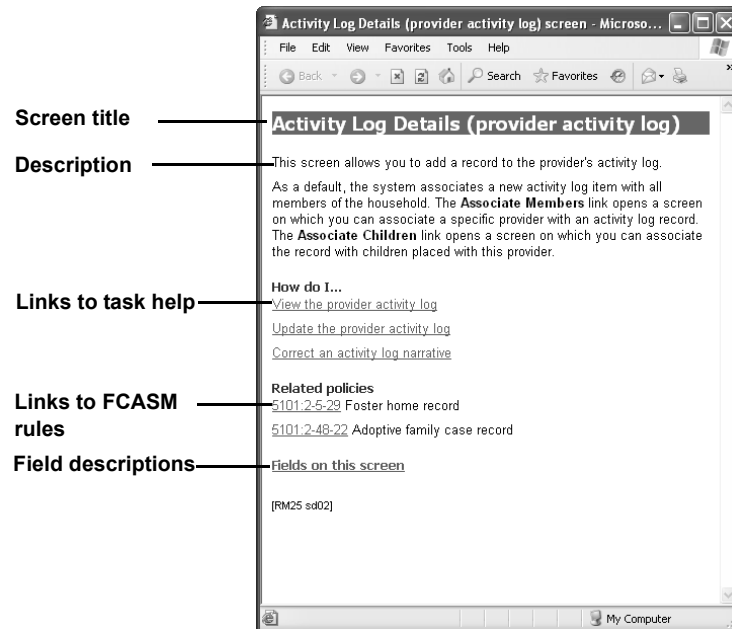
Guided walkthrough
Online help, task-based help

Let's look at another way to open the online help system.

1. Click the **help & training** header link.

2. Click the **Online Help** link.

This method displays the main help page with navigation panes. The left pane shows the table of contents as a default. The links in the top pane allow you to use the index, word search, and glossary.

(You can also reach this view from the **Show** link in screen help.)

Reference tools ——

The contents, index, search tool, and glossary appear in the left-side pane.

The content of a help topic appears in the large pane on the right.

Guided walkthrough
Online help, glossary

The main online help system includes a glossary of terms that are related to Ohio SACWIS.

1. Click the **Glossary** icon.

2. Briefly explore the glossary.

3. Close the browser window.

Select a word here.

The definition appears here.
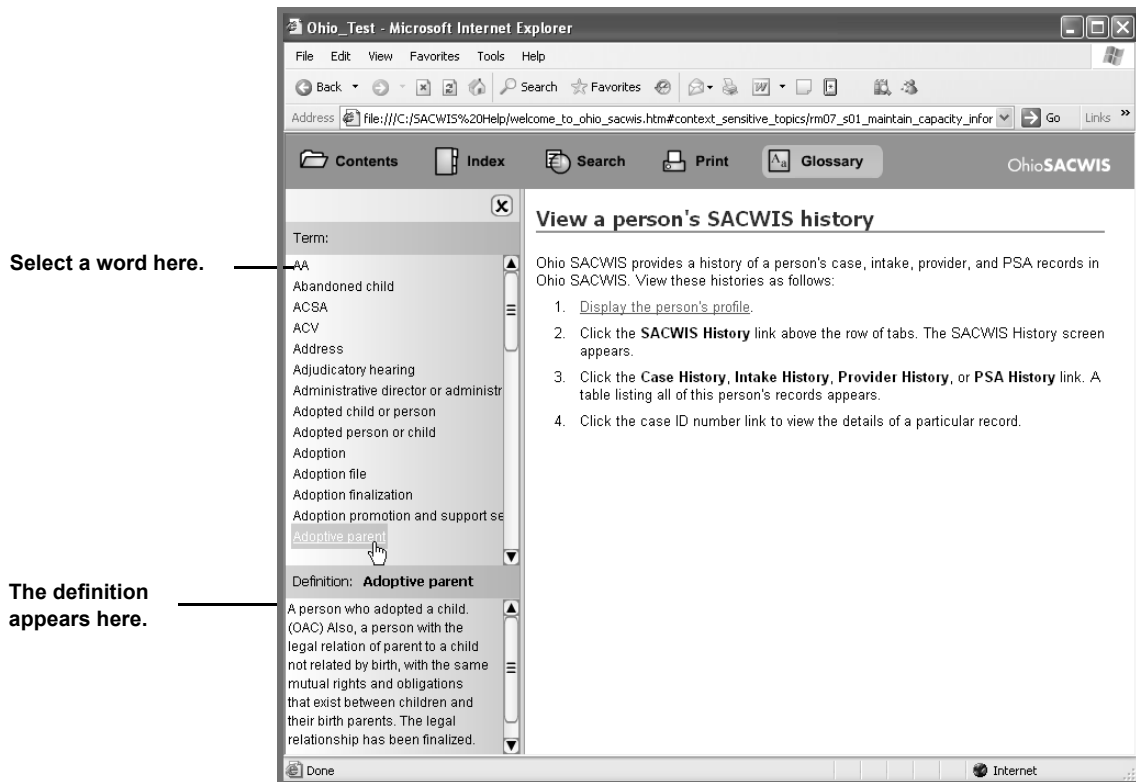
Guided walkthrough
Web-based FCASM

Online help explains how to complete records in the system. When workers need assistance with job-related decisions, they refer to the Web-based Family, Children and Adults Service Manual (FCASM).

Let's open the main page of the online FCASM.

1. Click the **Rules, Regulation and Policy** link.

2. Briefly explore the FCASM site.

3. Close the Web browser.

Activity
Web-based training

The **help & training** link also allows you to open Web-based training (WBT). This component of the performance support tools helps new and occasional users of Ohio SACWIS to learn the basic features of the system.

In this activity, you learn about security in Ohio SACWIS.

1. Click the **help & training** header link.

2. Click the **Web-based Training** link.

3. Select the **Getting Started** lesson.

4. Click the **Security** link.

5. Complete the Security topic. (Click the Next arrow and follow the instructions.)

6. Close the WBT when you complete the topic. (You don't need to do the Post-Test.)

Review
Basic navigation

The instructor will lead you through a review of the following:

- Primary tabs and secondary tabs

- The Home screen

- Workload screens

- Overview screens

Review
Basic navigation, cont.

- List screens

- Detail screens

- Online support tools

- Four "keys" needed to access data in Ohio SACWIS

Module 4
Using the Search Tool

What you'll do

As we've seen, workers can quickly get to the items in their workload from the Workload tab. However, many workers who are not assigned to workloads may also need to view various records. They do this through the search tool.

In this module, you will:

- Find a person profile
- Find an intake record
- Find a case record and add court details
- Find a provider record
- Find an employee record
- Review

Preview
Searches

Searches for records are conducted from the **search** header link.

Things to remember about searches:

- The system searches for records *statewide*.

- To use a search screen, you enter any combination of search criteria and click a **Search** button. The criteria vary by the type of record.

- Records that match your search criteria appear in the Search Results table.

- Each row in the Search Results table represents one record.

- Each **edit** link in the Search Results table lets you update the record.

Guided walkthrough
Find a person

As you recall, all case participants, providers, other involved persons, and agency staff are all "persons" in Ohio SACWIS. As such, they have person profiles.

A person profile may include as little as a name or as much as a name, address, demographics, education information, medical information, and so on.

Find information about Fred Stone:

1. Maximize Ohio SACWIS, if it's not already up.

2. Click the **search** header link. The system defaults to the Person Search tab.

3. Notice the type of criteria you can enter as part of your search.

4. Enter *Stone (AD)##* in the **Last Name** field.

5. Click **Search**. Notice that the people with this last name are listed in the Search Results table, along with key information.

6. Click the **edit** link next to Fred Stone.

7. Click the link for Fred Stone. Which safety hazards are selected?

8. Click the **Address** tab, then click the address link. What type of environmental hazard is associated with this address?

9. Click **Cancel**.

10. Click the **Safety Hazard** tab. Notice the safety hazard indicator selected on Fred's person profile.

11. Click the **SACWIS History** link. This displays the cases and intakes in which Fred is a participant.

12. Click **Close** to return to the person profile.

Guided walkthrough
Find an intake

"Intake" refers to the process performed by an agency to record and prioritize the receipt of reports and referrals to the agency. The intake status indicates where the intake is in this process.

Right now, you want to see the CA/N intakes that are currently completed and waiting for a screening decision.

1. Click the **search** header link.

2. Click the **Intake Search** tab.

3. Select CA/N Reports in the **Intake Category** field.

4. Select Complete in the **Intake Status** field.

5. Click **Search**.

6. Click the **view** link next to intake number 17911.

7. Notice that the check box **Completed by Screener** is checked.

8. Click the tabs on this intake to review the information collected.

9. Click **Close**.

Independent practice
Find a case

A case is created from an intake. During the case management, the worker records assessments, investigations (if there are allegations), service provision, progress reviews, placement details, and so on.

Let's find out if there are any associated persons on the Wilma Stone case.

1. Click the **Case Search** tab.

2. Enter *Stone (AD)##* in the **Case Last Name** field.

3. Click **Search**.

4. Click the **Case Members** link below the case ID number. This link lets you confirm the case members. It's also a quick way to see other basic case information.

5. Click the **Associated Persons** tab. Who is the temporary caregiver?

    _____

6. Click **Cancel**.

7. Click the **edit** link next to the Stone case.

8. Notice that the system displays the Case Overview screen.

9. Click the **View Case Information** link.

10. Notice that this is another way to display the information we just viewed.

11. Click **Cancel**, then **OK**.

Continue to the next exercise.

Independent practice
Find court details on a case

Remember, the menu on the left displays a number of links to other kinds of information associated with the current case.

Now you want to find court actions that involve Rockette Slate.

1. From the Case Overview screen, click the **Court** link in the menu on the left.

2. Notice the two links:

   * **Case Participants**. From this link you view histories of legal actions and legal status changes associated with a case participant.

   * **Case legal actions**. From this link you view all the legal actions associated with a case, including motions, hearings, subpoenas, rulings, and so on.

3. Click the **View Legal Status History** link for Rockette Slate. This lists the record of each legal status change.

4. Click **Close**.

5. Click the **View Legal Action History** link for Rockette Slate. Legal actions may be linked together to show a sequence of legal actions. Each link represents the first legal action in the series.

6. Click the first link. This displays the legal actions linked together.

7. Click **Close**.

Continue to the next exercise.

Independent practice
Find a provider, ODJFS

In Ohio SACWIS there are two types of providers: ODJFS and non-ODJFS. An ODJFS provider is licensed or certified through ODJFS or a sponsoring agency. An ODJFS provider is a home provider who offers foster home care, kinship care, or adoptive home care.

You would like to see adoptive home providers:

1. Click the **search** header link.

2. Click the **Provider Search** tab.

3. Select *Home* in the **Provider Category** field.

4. Select *Adoptive Care* in the **Provider Type** field.

5. Click **Search**.

6. Select the **view** link for Patty and George Green##.

7. Notice that the Provider Overview screen appears. It's on the **Directory** tab, under the **Provider** tab. Also notice that the menu displays links to any additional records.

8. Click the **Provider Information** link in the Provider Actions area.

9. Notice the type of basic provider information that's collected here.

10. Click the **Address** tab, which displays the address and phone.

11. Click **Close**.

12. Click the **Home Study** link in the menu on the left.

13. Select the **view** link next to the foster care home study record.

14. Notice the types of records that are collected as part of a home study. Links for these appear in the Topic column.

15. Click **Close** to return to the Home Study list screen.

16. Click **Close**. You're back on the Provider Search screen.

Continue to the next exercise.

Note

Current providers will be added to the Ohio SACWIS database before roll-out.

Independent practice
Find a provider, non-ODJFS

A non-ODJFS provider is *not* licensed or certified through ODJFS or a sponsoring agency. A non-ODJFS provider includes health care providers, Head Start, out-of-state home care providers, counselors, tutors, and so on.

You would like to get in touch with a counseling center and see if they can help with a particular client.

1. From the Provider Search screen, select non-ODJFS in the **Provider Category** field and Mental Health Care Provider (Private) in the **Provider Type** field.

2. Click **Search**.

3. Click **view** next to Rolling Stone Counseling Center##.

4. Notice that, as with the ODJFS provider, the system displays the Provider Overview screen. The items represented in the menu on the left would be completed as needed.

5. Click the **Provider Information** link. Notice that the **Caregivers** tab is disabled. This information is not collected for non-ODJFS providers.

6. Click the **Members** tab. A worker would enter the provider's staff or main contact here. Who is the contact person for this center?

   _____

7. Click the **Address** tab. What's the phone number for the center?

   _____

8. Click **Close**.

9. Click **Close**. You're returned to the Provider Search screen.

Continue to the next exercise.

Independent practice
Find an employee

Information about State and agency workers is added to Ohio SACWIS. This includes the worker's current job, job history, and any licenses.

You want to find some information about Sally O. Brown, who apparently works for Franklin County.

1. Click the **Employee Search** tab.

2. Enter Brown## in the **Last Name** field and Sally in the **First Name** field.

3. Click **Search**.

4. Click **select** next to the name.

    Who is Sally's supervisor? _____

    What is Sally's job title? _____

    Does Sally have a license? _____

5. Click **Cancel** and **OK**. You are now on the Staff secondary tab on the Administration primary tab.

6. Click the **home** header link. You are now on the Home screen.

Continue to the next exercise.

Independent practice
Explore

Take a few minutes now to explore on your own. Conduct additional searches, open intake, case, or provider records, and navigate through the records.

Use these tools to help guide you:

- Your User Guide

- Screen-level help (from the **help** link at the upper-right corner of the screen)

- The main online help system (Click the **help & training** header link, then select **Online help**.)

Review
Using the search tool

1. The **search** header link lets you find which types of records?

2. True or False: When the system conducts a search from the
    search header link, it looks only for records in your own agency.

3. True or False: The person profile contains demographic
    information.

4. What else did you discover?

Module 5
Staff Administration

What you'll do

If your job requires you to manage staff, you will do much of your work from the **Administration** tab. You might also need to record certain approvals, which you can do from the **Approvals** tab on the Home screen. This module introduces you to those areas.

You will:

- Approve a justification waiver
- View work assignments
- Learn what's on the **Administration** tab
- Display employee information
- Display maintenance functions
- Create a broadcast message
- Add an employee training competency
- Create a training competency
- Review

Guided walkthrough
Approve a justification waiver

An assessment (in which there are allegations) must be completed within 30 days of the receipt of an intake report. If a worker finds that a piece of the assessment cannot be completed within this time, he or she may request, with a justification, a 15-day extension. As an agency director or designee, you must approve the extension.

You enter approvals of such work items from the **Approvals** tab on the Home screen.

Let's approve a justification waiver:

1. From the Home screen, click the **Approvals** tab.

2. Click the **Needs Approval** link.

3. Click the link in the Task column for Constance Lake.

4. Notice the kind of information that appears on the Justification Request Details screen.

5. Click the **Process Approval** button.

6. Notice the kind of information that appears on the Process Approval screen, including the routing history.

7. Complete the following fields with the data shown:

Field Name	Enter/Select	Notes
Action	*Approved-Final*	
Comment	*(a short message)*	
Reviewers/Approvers	*Simone Chase##*	

8. Click **Save**.

Presentation
View the Administration tab

The **Administration** tab is on the primary row of tabs on the Home screen. It's used for staff management, system administration, and various utilities.

Depending on the managerial role you play at your agency, you're most likely to use these secondary tabs:

- **Staff**: Maintain on-call staff, maintain employee information, assign delegates

- **Maintenance**: Generate broadcast messages

- **Reports**: Generate standard reports

- **Training**: Maintain training competency areas and employee training plans
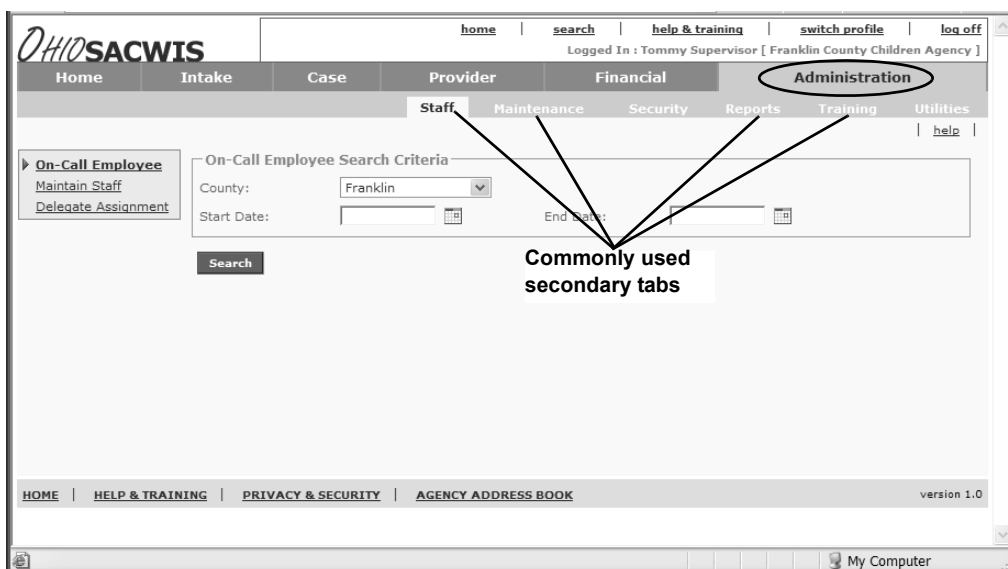
Guided walkthrough
View an on-call employee

First, let's take a look at the information managed from the **Staff** tab:

- On-Call Employees

- Maintain Staff

- Delegate Assignment

Let's see who's on call for Franklin County.

1. Click the **Staff** tab.
2. Click the **On-Call Employee** link in the menu on the left.
3. Select Franklin County in the **County** field.
4. Click **Search**.
5. The Search Results table displays the on-call employee.

Guided walkthrough
View employee information

As you recall, we looked at employee information by using the search tool. You can also view — and update — this information from the **Staff** tab.

Let's look at the record for Sam Weaver.

1. Click the **Maintain Staff** link in the menu on the left.

2. Enter the following search criteria:

Field Name	Enter/Select	Notes
Last Name	*Weaver##*	
First Name	*Sam*	

3. Click **Search**.

4. Click the **edit** link next to Sam Weaver in the Search Results table.

5. Notice the Employee Information screen. This is the same screen you saw earlier when you conducted an employee search.

6. Click **Cancel**.

Guided walkthrough
View the Maintenance tab

Examine the type of information updated from the Maintenance tab:

- Agency Information

- Units & Supervisors

- Ticklers

- Notifications

- Lookup Data

- Tickler Disposal

- Broadcast Messages

Guided walkthrough
Create a broadcast message

Remember, the Home screen displays messages broadcast to Ohio SACWIS users statewide or to those within an agency.

Create a broadcast message.

1. Click the **Broadcast Message** link in the menu on the left.

2. If it's not already selected, select Franklin County Children's Services Board in the **Agency** field.

3. Click **Search**.

4. Click **Add Broadcast Message**.

5. Complete the fields as described below:

Field Name	Enter/Select	Notes
Start Date	(Today's date)	
Start Time	(5 min. from now)	
End Date	(Today's date)	
End Time	(2 hours from now)	
Message	(A short message)	
Recipients	Public	

6. Click **Save**.

In a few minutes you should see your message (and others) on your Home screen.

Independent practice
Add a training competency

On the **Training** tab, you establish the training competencies that are used in worker training plans. The training plan tracks the worker's completion of courses that meet the requirements of the competency area.

Add a competency area now.

1. Click the **Training** tab.

2. Click the **Competencies** link in the menu on the left.

3. Select Franklin County Children Services in the **Agency** field.

4. Click **Search**.

5. Click **Add Competency Area.**

6. Complete the fields as described below:

Field Name	Enter/Select	Notes
Category	Core Competencies	
Type	Case Worker	
Source	OCWTP	
Number	CC101##	
Competency Area	Case Planning	
Description	(A short description)	

7. Click **Save**. You should receive an error message. Notice how the system prompts you when you need to add something to the record.

8. Add comments.

9. Click **Save**.

Review
Staff administration

1. If you're a manager who approves work items, or a director who approves justification waivers, where do you go to approve these work items?

2. It's after hours and you need to contact an on-call worker in Adams county. Where do you look for this information?

3. You work in Franklin county, and your worker, Jane Marie Adams, is going on leave for two months. Where do you record this?

4. Sometimes you're asked to send a broadcast message. Where do you go in the system?

Module 6
Documents and Reports

What you'll do

In this module, you will learn about the reports you can generate in Ohio SACWIS. You will:

- Learn what a "report" is
- Review the list of statistical reports in Ohio SACWIS
- Generate different types of report documents
- Review

Presentation
What's a report?

In Ohio SACWIS, "report" refers to any document the system generates by pulling information from the database. For example, this document may be a form, notice, case plan, JFS report, monthly statistical report, and so on.

Ways to print from Ohio SACWIS

The way to generate and print a report document depends on the type of document it is. Generally, there are four ways to generate a document:

- From the **Reports** tab in the Administration area.

- From a **report** link or JFS report title link on an intake, case, or provider record

- From the **Forms/Notices** link on a case or provider record

- From the **Generate Report** button

Presentation
Statistical reports

For the purposes of this class, we'll use the term "report" in the traditional sense, to refer to statistical reports. These provide the summaries and histories that allow you to perform historical and predictive trend analyses. (We'll use the common terms to refer to other documents.)

A worker has access to the reporting feature if he or she is assigned to the appropriate user group(s).

Two types of reports

There are two types of statistical reports in Ohio SACWIS:

- Standard or predefined

- Ad-hoc, created using COGNOS

In this class, we address the standard reports.

Your instructor will hand out a table that lists the standard reports currently in the system.

Take a few minutes to review this listing.

Guided walkthrough
Generate a standard report

Standard reports are on-demand reports that have pre-defined formats. Rather than being scheduled as a batch job, these on-demand reports are generated *only when a worker requests one*.

Follow along with the instructor to generate a standard report.

1. From the Home screen, click the **Administration** tab. (If you don't see this tab, click the **home** header link.)

2. Click the **Reports** tab.

3. Enter the following search criteria:

Field Name	Enter/Select	Notes
Report Category	Case	
Report Type	Agency	

4. Click **Search**. Notice the Report History screen. It lists the reports that have been generated. (In training, this screen may be empty.)

5. Click **Report** for the Safety Response Report.

6. Click **Generate Report**.

7. Enter the following parameters:

Field Name	Enter/Select
From Date, To Date	01/01/04 to today's date
Agencies	Franklin County Childrens Services Board
Report Type	Detail

8. Click **Generate Report**.

9. Click the **Save** button to add this report to the report history.

10. Close the PDF file. (We won't actually print the report in class.)

Note

Some report documents require you to enter report parameters. But not all do. The parameters vary by report.

Guided walkthrough
The Document History screen

As you've noticed, the system displayed a Report History screen when you generated a report. You see a Document History screen when you print other documents. This screen displays a record of each time the report or document of this type has been saved to the Ohio SACWIS history.

Data in Ohio SACWIS is dynamic—it changes frequently. So a report you generate on one day may be different from a report you generate the next day. It's like a snapshot. Sometimes you want to keep a snapshot; sometimes you don't.

Important!

You *must save* a report to the Ohio SACWIS database in order for it to become part of the report or document history and available to others for viewing or printing.

To save the report after you generate it, click the **Save** button in the lower-left portion of the Ohio SACWIS screen.

Guided walkthrough
Generate a JFS report or form

Workers in each functional area print a number of documents during the course of their work. When a document is associated with a certain screen, a **report** link or button appears on the screen.

As an example, we'll generate a JFS 01441 Intake Report Worksheet Form from an intake record.

1. Click the **home** header link.

2. Click the **Intake** tab.

3. Press Ctrl+F and find intake 17951. This is an intake for Loretta Baccus.

4. Click the **Report** link next to this intake.

5. Click the **Generate Report** button.

6. Click **Yes** for reporter information.

7. Click **Generate Report**.

    The JFS 01441 CA/N Intake Report Worksheet Form appears in a PDF file for you to review. This report reflects a "Draft" watermark because a screening decision has not been made.

8. Close the PDF file.

    Again, if you wanted this form to become part of the document history on this case, you would click the **Save** button in the lower-left of the Ohio SACWIS screen.

Guided walkthrough
Generate a letter or notice

Forms and notices are printed from a particular case or provider record. For example, a worker would print a semiannual review letter, a case closure letter, the ongoing case closure checklist, and ODJFS forms from a case.

Let's generate a notification letter to Wilma Stone regarding her case.

1. Click the **home** header link.

2. Click the **Case** tab.

3. Click the **Workload** tab.

4. Click on **Sam Weaver**.

5. Select the Stone (CM)## case.

    The Case Overview screen appears. This displays a summary of key information about the case.

6. Click the **Forms and Notices** link in the menu on the left.

7. Select Person Overview from the **Forms/Notices** field.

8. Click **Select**.

9. Notice the Document History. It displays each instance of this document on this case. (In training, this screen may be blank.)

10. Click **Generate Report**.

11. Select Rockette Slate and click the check boxes next sections 1, 6, and 9.

12. Click **Generate Report**.

    The document appears in a PDF file for you to review.

13. Close the PDF file.

Note

Remember, if you wanted this letter to become part of the document history on this case, you would click the **Save** button in the lower-left of the Ohio SACWIS screen.

Review
Reports

The instructor will lead you through the following review questions.

1. What are the various ways in which you can access reports and other documents?

2. What are the two types of statistical reports in Ohio SACWIS?

3. True or False: Every time you generate a standard report, it's saved to the Ohio SACWIS database for others to view or print.