

RECORDING A CASE SERVICE

Navigate to the Case

1. Click the Case Services link in the navigation menu

Case Overview

Case ID: 2646016 Case Status: Open (04/07/2014)
Case Name: Bob, Sponge Case Category: Ongoing
Case Address: Agency: IHS Training
Geo Code: Geo Code:

Case Actions

[View Case Information](#)
[Linked Cases](#)
[ProtectOhio Category](#)

Case Ticklers

No Ticklers Found [Manually Dispose of Tickler](#)

[View Case Status History](#) | [View Assignment History](#)

Assignment Information

Worker Name	Role	Agency of Worker
Training01. User	Screening Decision Maker	IHS Training

Eligibility Assignment Information

Person Name	Eligibility Specialist(s)
No Assignment Information Found	

[Close](#)

2. Select Case Member or Caregiver/Caretaker from the Service dropdown box and click the Add Case Services Button. (The Caregiver/Caretaker selection can only be made if at least one child is in an out of home placement).

Case Services

Service: [Add Case Services](#)

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

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
edit referrals	Bob, Sponge; Squirrel, Sandy	Case Management/Case Management Services	Case Member	04/23/2014 -	delete service and Not Linked
Case Member / Caregiver / Caretaker History					
edit referrals	Bob, Sponge; Squirrel, Sandy	Case Management/Information & Referral Services	Case Member	04/07/2014 -	delete service and Linked
Case Member / Caregiver / Caretaker History					

3. The Service Information page is displayed. Enter the Effective Date, Service Category and Service Type. Select the Case Member Name from the dropdown and click the Add Status/Provider button.

Service Information Service Review Service Activity

Case ID: 2646016 Case Status: Open (04/07/2014)
Case Name: Bob, Sponge Case Category: Ongoing

Service Information

Agency: IHS Training
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: <input type="text"/>	Add Status / Provider					

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

- Record the Status and Status Begin Date. You can also add frequency, provider and service goal. To add a frequency, click the Add Frequency button. (If you are not adding a frequency, skip to #6. If you are not adding a service goal skip #10 and #11)

Case ID:	2646016	Case Status:	Open (04/07/2014)
Case Name:	Bob, Sponge	Case Category:	Ongoing

Status Details

Case Member Name:

Squirrel, Sandy - 10/22/2003

Service Category:

Counseling

Service Type:

Family Counseling

Status: *

Status Begin Date: *

Status End Date:

End Reason:

Secondary End Reason:

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

Participation Frequency

Expected Participation Frequency	How Long	Start Date	End Date
<div>Add Frequency</div>			

Provider Information

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

Service Goal History

Service Goal	Effective Date
<div>Add Service Goal</div>	

Comments:

Spell Check

Clear

4000

Created in Error

Apply to Other Members

Save

Cancel

- Record the Expected Frequency information. The Expected Frequency Start Date should be the date of the first scheduled appointment. Once the information is recorded, click the OK button.

Case ID: 2646016 Case Status: Open (04/07/2014)
Case Name: Bob, Sponge Case Category: Ongoing

Expected Frequency

Case Member Name: Squirrel, Sandy DOB: 10/22/2003

Expected Participation Frequency: *

Start Date: *

Expected Duration:

End Date:

OK Cancel

- Record a provider by clicking the Link Provider button (services with a status of referred, scheduled and provided must have a provided linked).

Case ID: 2646016 Case Status: Open (04/07/2014)
Case Name: Bob, Sponge Case Category: Ongoing

Status Details

Case Member Name: Squirrel, Sandy - 10/22/2003
Service Category: Counseling Service Type: Family Counseling

Status: *

Status Begin Date: *

Status End Date:

End Reason:

Secondary End Reason:

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

Participation Frequency

Expected Participation Frequency	How Long	Start Date	End Date
Add Frequency			

Provider Information

Provider	Provider Address
Link Provider	

Service Goal History

Service Goal	Effective Date
Add Service Goal	

Comments:

Spell Check Clear 4000

☐ Created in Error

Apply to Other Members

Save Cancel

7. You can filter provider search by entering additional Search Criteria. When the search criteria is entered, click the Search button

Provider Match Search Criteria

Provider Information

Service Category: Search Date:

Service Type:

Agency Type:

Agency:

☐ By Available Capacity

Available Counties:

Selected and Nearby Counties: OR School District:

[Additional Search Criteria](#)

Child Information

Gender: From Age: To Age: Language:

[Additional Search Criteria](#)

Sort Results By:

8. Click the select link next to the provider you want to link to this services. (If the provider cannot be found, the provider may need to be added to SACWIS.)

Provider Match Search Results

Result(s) 1 - 1 of 1 Page 1 of 1

	Provider Name / ID	Provider Category	Provider Status	Current Primary Address	Current Vacancies	Services	Agency
<input type="button" value="SELECT"/> <input type="button" value="VIEW"/>	Montgomery Co. Children Services / 50644070	NONOOPS	ACTIVE	3304 N Main St, Dayton, OH 45405-2709		Individual counseling	IHS Training

9. The provider is now linked to the service

Provider Information

Provider	Provider Address
view Montgomery Co. Children Services	3304 Main Dayton OH 45405-2709

[Link Provider](#)

10. Record a service goal by clicking the Add Service Goal button

Case ID: 2646016 Case Name: Bob, Sponge Case Status: Open (04/07/2014) Case Category: Ongoing

-Status Details-

Case Member Name: Squirrel, Sandy - 10/22/2003 Service Category: Counseling Service Type: Family Counseling

Status: * Status Begin Date: * Status End Date: End Reason: Secondary End Reason:

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

-Participation Frequency-

Expected Participation Frequency	How Long	Start Date	End Date
Add Frequency			

-Provider Information-

Provider	Provider Address
Link Provider	

-Service Goal History-

Service Goal	Effective Date
Add Service Goal	

Comments:

[Spell Check](#) [Clear](#) [Help](#)

☐ Created in Error

-Apply to Other Members-

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

11. Select a Service Goal and enter the Effective Date then click OK

Case ID: 2646016 Case Status: Open (04/07/2014)
Case Name: Bob, Sponge Case Category: Ongoing

Service Goal History Details

Service Category: Counseling Service Type: Individual counseling

Service Goal: Effective Date: 05/01/2014

OK Cancel

12. The service goal is now added

Service Goal History

	Service Goal	Effective Date	
<input checked="" type="checkbox"/>	Prevention	05/01/2014	delete

[Add Service Goal](#)

13. Apply to other Members can be done by selecting the box next to the case member name or if you would like to apply to all case members select the box in the header and click save

Apply to Other Members

<input type="checkbox"/>	Case Member	Status	Provider	Status Begin Date/End Date
<input checked="" type="checkbox"/>	Bob, Sponge - 10/26/1969			

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

14. Click Save

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 Bob, Sponge - 10/26/1969	Scheduled	Montgomery Co. Children Services	Family Counseling	3304 N Main St, Dayton, OH 45405-2709	08/01/2014	
edit Squirrel, Sandy - 10/22/2003	Scheduled	Montgomery Co. Children Services	Family Counseling	3304 N Main St, Dayton, OH 45405-2709	08/01/2014	

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

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

15. The Case Service has been recorded

Case Services

Service: [Add Case Services](#)

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

Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
edit Bob, Sponge; Squirrel, Sandy	Counseling/Family Counseling	Case Member	08/01/2014 -	delete service and Not Linked
<input checked="" type="checkbox"/> Case Member / Caregiver / Caretaker History				