

Intake

This packet contains the exercises listed below. In all of these exercises, you will act as an intake screener in a county children services department. Complete the exercises at your own pace. If you need help, remember to use your User Guide, WBT, online help, or online policies. Ask the trainer for assistance if you can't find the answer to your questions in these sources.

What you'll do

- Record a CA/N intake
- Record an intake for a family in need of services
- Record an I and/or R intake



► **Important:** These exercises may not reflect the process flow at your county or office. They use contrived data for training purposes. Still, you can apply what you learn in class to the processes at your office.



Exercise IN-1. Record a CA/N intake

Scenario

On January 3, 2005, at 2:15 PM you receive a referral regarding Rockette Stone. The reporter, Betty Babble, is one of her neighbors. Rockette is friends with the Babble children and spent last night at their home. During the visit Rockette complained that her right arm hurt. Betty noticed several oval, bluish-purple bruises on Rockette's arm, which was also swollen and tender to the touch. When Mrs. Babble asked her about the bruises, Rockette said her stepfather had gotten angry and pulled her out of a chair. Mrs. Babble is afraid that Rockette's arm may be broken.

There are five members in the Stone family, all residing at the same home:

- Fred (Wilma's husband, he is Rockette's stepfather and the biological father of Sandy and Barney)
- Wilma (Fred's wife and the children's biological mother)
- Rockette (older daughter)
- Sandy (younger daughter)
- Barney (son)

Create a referral based on this information.

Tasks

- Task 1. Create the intake
- Task 2. Record information about the reporter
- Task 3. Add participants to the intake
- Task 4. Define roles for the participants
- Task 5. Record detailed information about the participants
- Task 6. Add a new participant
- Task 7. Define family relationships
- Task 8. Record more information about the allegation
- Task 9. Mark the intake complete (ready for a screening decision to be made)

Task 1. Create the intake

First, enter basic information such as when and how the intake was received and what kind of intake it is. Provide a brief description of the situation and any key events.

1. On the SACWIS Home screen, click the **Intake** tab. Ohio SACWIS displays the Intake Workload screen.
2. Click the **Add Intake** button at the bottom of the screen. Ohio SACWIS displays the **Basic** tab for entering intake information.
3. Complete the following fields with the data provided below:

| Field Name | Information to Enter/Select | Notes |
|--------------------------------------|--|---|
| Received | 01/03/2005, 2:15 PM | Don't forget to select AM or PM. |
| Intake Method | Phone | |
| Intake Category | CA/N Report | The Intake Types field is populated with appropriate choices when you select an intake category. |
| Intake Types | Physical Abuse | Click Add> to move your selection to the Selected Types field. |
| Intake Narrative | <i>Stepfather pulled Rockette out of a chair by her right arm, leaving bruises. Arm is swollen and tender. It may be broken.</i> | |
| Living Arrangement at Time of Intake | Married two parent household (one biological or adoptive & one step parent) | |

Note

Ohio SACWIS generates an ID number for the intake when you click **Apply**. Write this number down on a post-it note.

4. Click **Apply** to save your work.

Result Ohio SACWIS saves the intake and generates an Intake ID number, which is displayed at the top of the **Basic** tab. The intake will now be displayed in the list on the Intake Workload page.

Task 2. Record information about the reporter

Enter information about Betty Babble, the Stone's neighbor.

1. Click the **Reporter** tab.
2. In the Reporter Type field, select **Friend/Neighbor**.
3. Click **Search Person** beside the **Reporter Name** field.
4. Complete the following fields:

| Field Name | Information to Enter/Select | Notes |
|------------|-----------------------------|-------|
| Last Name | <i>Babble (IN)##</i> | |
| First Name | <i>Betty</i> | |

5. Click **Search**. SACWIS finds a person record for Betty and displays it in the search results.
6. Click the **select** link beside Betty's name to select the record. SACWIS returns to the **Reporter** tab and displays Betty's name and gender.
7. In the **Relationship to Alleged Victim** field, type *Friend*.
8. Click **Apply** to save your work.
9. Click the **Reporter Additional** link. The Situation Knowledge Source screen appears.
10. Complete the following fields as indicated:

| Field Name | Information to Enter/Select | Notes |
|--|---|-------|
| Told by Another Party | Select this check box. | |
| Date | <i>01/03/2005</i> | |
| Other Party Name, Contact Information | <i>ACV told the reporter.</i> | |
| Last Date and Time Reporter had Contact with the ACV's | <i>ACV is currently at the reporter's home.</i> | |

11. Click **Apply** to save your work.

Result SACWIS saves your work without leaving the Situation Knowledge Source screen.

Note

The **Reporter** tab consists of two screens: Reporter Information and Reporter Additional. Notice the **Reporter Additional** link just below the **Reporter** tab.

Task 3. Add participants to the intake

Now record information about the people involved in the report. In this scenario, four members of the Stone family are known to Ohio SACWIS (that is, there’s already information about them in the database). All the family members are linked in the system, so once you find one family member you can easily add the others.

1. Click the **Participants** tab.
2. Click the **Search Person** button. SACWIS displays the Person Search screen.
3. Enter the information below in order to search for Wilma Stone.

| Field Name | Information to Enter/Select | Notes |
|------------|-----------------------------|-------|
| Last Name | Stone (IN)## | |
| First Name | Wilma | |

Note

To select a person in the Person Search Results table, select the check box on the same row as the name you want to choose.

4. Click **Search**. SACWIS finds a record for Wilma Stone and displays it in Person Search Results.
5. Click the check box next to the name **Stone, Wilma**.
6. Click the **Select** button. The system returns to the **Participants** tab in the intake, where Wilma has been added to the Participants table.
7. Click the **edit** link in Wilma’s row. The Participant Details screen appears.
8. In the **Available Roles** field, select Parent.
9. Click **Add>** to assign this role to Wilma. SACWIS adds your selection to the **Selected Roles** field.
10. Click **OK**. Ohio SACWIS returns to the **Participants** tab.
11. Click **Apply** to save your work.
12. Click the **Related Persons** link beneath Wilma’s name. SACWIS displays a list of people who are linked to Wilma in existing data.
13. Select Fred, Rockette, and Sandy by clicking the check boxes beside their names.
14. Click **OK**.

Result SACWIS saves your work and returns to the **Participants** tab.

Task 4. Define roles for the participants

Now that you've identified the family members in the intake, define each person's role in the reported situation.

1. In the Participants list, click the **edit** link beside Fred Stone. The Participant Details screen appears.
2. In the **Available Roles** field, select Alleged Perpetrator (AP) and Parent. (Hold down the **Ctrl** key while you click both.)
3. Click **Add>** to assign these roles to Fred.
4. Click **OK**. The system returns to the **Participants** tab on the Intake Entry screen.
5. Repeat steps 1–4 to assign roles to Rockette and Sandy.

| Person | Role | Notes |
|----------|----------------------------|-------|
| Rockette | Alleged Child Victim (ACV) | |
| Sandy | Other Involved Child (OIC) | |

6. Click **Apply**.

Result SACWIS saves your work without leaving the **Participants** tab.

Task 5. Record detailed information about the participants

After you assign a role to a participant, you can enter information that’s relevant to that role. Add information about Rockette, the ACV, and Fred, the AP.

1. On the **Participants** tab, click the **Alleged Child Victim (ACV)** link in Rockette’s row. Ohio SACWIS displays the Child Functioning screen.
2. Complete the following fields:

| Field Name | Information to Enter/Select | Notes |
|---|--|--|
| Current Behavior and Level of Functioning | <i>Unknown</i> | |
| Actions Taken to Reduce Risk in Own Home or Out of Home Care Setting | <i>ACV is at reporter’s home and will remain there for about 6 hours.</i> | |
| Child’s Current Condition | <i>ACV has bruising on arm. Arm is swollen, tender, and may be broken.</i> | |
| Are There Prior Suspected Incidents of Abuse or Neglect? (drop-down list) | Yes | In the text box, type: <i>Betty reports she knows the agency was involved on another occasion but isn’t sure when.</i> |
| Is the Child Safe? (drop-down list) | Yes | In the text box, type: <i>Reporter will protect child.</i> |
| Caretaker’s Ability to Protect | <i>AP does not have access to ACV.</i> | |

3. Click **Apply**. The system saves your work and takes you back to the Participants screen.
4. Click on the **ACV** link again.
5. Click the **Custody/Location** link. The Custody/Location screen appears.

6. Complete the following fields:

| Field Name | Information to Enter/Select | Notes |
|--|--------------------------------------|-------|
| Location Type | Other | |
| Description if Other | <i>Neighbor's home</i> | |
| Location Details | <i>Next door to the Stone's home</i> | |
| Phone | <i>555-221-1958</i> | |
| Duration Child Will Be At Current Location | <i>6 hours</i> | |

7. Click **Save**. Ohio SACWIS saves your work and returns to the **Participants** tab.
8. Click the **AP** link in Fred's row. Ohio SACWIS displays the Alleged Perpetrator Details screen.
9. Enter the following information about Fred:

| Field Name | Information to Enter/Select | Notes |
|---|--|-------|
| Location Type | Other | |
| Description if Other | <i>Dinosaur Downs</i> | |
| Location Details | <i>Dinosaur Downs is located on Hwy. 53 just south of the quarry.</i> | |
| Duration AP Will Be at Current Location | <i>Approximately 6 hours</i> | |
| Access to Alleged Child Victim(s) | <i>The AP does not have access at this time.</i> | |
| Behavior and Functioning of AP | <i>Fred exhibits explosive behavior. He has been arrested several times for assault.</i> | |

10. Click **Save**.

Result SACWIS saves your work and returns to the **Participants** tab.

Note

The Unknown check box is selected if you do not know the participant's name. (Click the help link on the screen for additional information.)

Task 6. Add a new participant

A few pages ago, you may have noticed that Ohio SACWIS did not have a record for Barney Stone. Barney is the youngest child and had not been born when the previous referral was processed, so you need to add Barney to the system now. This is a two-step process: First, add Barney to the referral as a participant. Then, search SACWIS for an existing person record. You won't find one, so you'll have to create a new person record for Barney.

1. Click **Add Participant**.
2. Complete the following fields:

| Field Name | Information to Enter/Select | Notes |
|-----------------|-----------------------------|---|
| First Name | Barney | |
| Last Name | Stone (IN)## | |
| Gender | Male | |
| DOB | 05/12/2003 | |
| Available Roles | Other Involved Child (OIC) | Click Add> to move your selection to the Selected Roles field. |

3. Click **OK**. SACWIS returns to the **Participants** tab.
4. Click **Apply** to save your work.
5. Click the **search** link in Barney's row. The Person Search screen appears. SACWIS transfers Barney's information to the appropriate fields.
6. Click the **Search** button. There is no record for Barney Stone.
7. Click **Add Person**. The Person Information screen appears. Notice that SACWIS has prepopulated the appropriate fields with the information you've already entered.
8. Click **Save**.

Result Ohio SACWIS saves your work and returns to the **Participants** tab. You have added Barney as a participant, and you have created a person record for him: notice the number in the Person ID column beside his name.

Task 7. Define family relationships

Define the relationships between all members of the family. SACWIS will add the reciprocal of each relationship you enter to reduce the amount of work you have to do.

1. In the Participants Relationships table, click the **edit** link for Fred Stone. The Relationships screen appears.
2. Complete the following fields:

| Field Name | Information to Enter/Select | Notes |
|----------------|-----------------------------|-------|
| Wilma Stone | Wife | |
| Rockette Slate | Stepdaughter | |
| Sandy Stone | Biological Daughter | |
| Barney Stone | Biological Son | |

3. Click **Save**. SACWIS returns to the **Relationships** tab.
4. Repeat steps 1 through 3 for Wilma:

| Field Name | Information to Enter/Select | Notes |
|----------------|-----------------------------|-------|
| Rockette Slate | Biological Daughter | |
| Sandy Stone | Biological Daughter | |
| Barney Stone | Biological Son | |

Note

Ohio SACWIS transfers relationships that have already been defined, reducing the amount of work you have to do. For example, since you defined Wilma as Fred's wife, SACWIS has linked Fred to Wilma as her husband.

5. Repeat steps 1 through 3 for Rockette:

| Field Name | Information to Enter/Select | Notes |
|--------------|-----------------------------|-------|
| Sandy Stone | Half Sister | |
| Barney Stone | Half Brother | |

6. Repeat steps 1 through 3 for Sandy:

| Field Name | Information to Enter/Select | Notes |
|--------------|-----------------------------|-------|
| Barney Stone | Biological Brother | |

7. You should be on the **Participants** tab. Click **Apply**.

You do not need to enter any relationships for Barney: Ohio SACWIS has already supplied these based on the information you entered for the other family members.

Result The system saves your work without leaving the **Participants** tab.

Task 8. Record more information about the allegation

The intake narrative you enter on the **Basic** tab should cover the basic points of the allegation. The **Allegations** tab provides a place to enter information that complements or extends the information in your narrative.

1. Click the **Allegations** tab.
2. In the **Setting Type** field, select Own Home. SACWIS displays Rockette’s home address.
3. Click **Apply** to save your selection.
4. Click the **Details** link. The Allegation Details screen appears.
5. Click **Add Allegation**.
6. Complete the following fields:

Note

When you select own Home as the setting type, SACWIS displays the ACV’s home address if there is only one ACV and his or her address is marked Primary. Otherwise, click **View Participant Addresses** and select the appropriate address.

| Field Name | Information to Enter/Select | Notes |
|------------------------|-----------------------------|-------|
| Alleged Child Victim | Rockette Slate (IN)## | |
| Alleged Perpetrator(s) | Fred Stone (IN)## | |
| Allegation Type | Physical Abuse | |

7. Click **OK**. SACWIS returns to the Allegation Details screen, which now displays information about the allegation.
8. Click **Apply**.

Result SACWIS saves your work without leaving the Allegation Details screen.

Task 9. Mark the intake complete (ready for a screening decision to be made)

You've captured enough information now, so the intake is ready for review by the screening decision maker (SDM).

1. Click the **Basic** tab.
2. Select **Intake Completed by Screener** (it's a check box near the bottom of the **Basic** tab).
3. Click **Save**.

Result Ohio SACWIS saves the intake and returns to the Intake Workload screen. The intake will now appear in the SDM's workload. You have completed this exercise.

Exercise IN-2. Record a Family in Need of Services intake

Scenario

You've received a telephone call from Mercy Hospital: a mother has dropped off a newborn who meets the criteria to be classified as a Safe Haven Baby.

Create an intake for this child.

Tasks

- Task 1. Create the intake
- Task 2. Record information about the reporter
- Task 3. Add participants to the intake
- Task 4. Mark the intake complete (ready for a screening decision to be made)

Task 1. Create the intake

Start by entering key facts on the **Basics** tab, then save your work. (This exercise starts on the Intake Workload screen where the previous exercise ended.)

1. Click the **Add Intake** button at the bottom of the screen. Ohio SACWIS displays the **Basic** tab for entering intake information.
2. Complete the following fields with the data provided below:

| Field Name | Information to Enter/Select | Notes |
|--------------------------------------|---|---|
| Received | 10/31/2005, 2:15 PM | Don't forget to select AM or PM. |
| Intake Method | Phone | |
| Intake Category | Family in Need of Services | |
| Intake Type | Safe Haven/Deserted Child | Click Add> to move your selection to the Selected Types field. |
| Intake Narrative | <i>Mercy Hospital has received a child from the mother. The mother does not intend to return for the child. The hospital is requesting that the agency take responsibility for the child.</i> | |
| Living Arrangement at Time of Intake | Other setting (hospital, secure facilities, etc.) | |

Note

Ohio SACWIS generates an ID number for the intake when you click **Apply**. Write this number down on a post-it note.

3. Click **Apply**.

Result Ohio SACWIS saves the intake and generates an Intake ID number, which is displayed at the top of the **Basic** tab. The intake will now be displayed in the list on the Intake Workload screen.

Task 2. Record information about the reporter

This report is from a mandated reporter. Use the **Reporter** tab to capture this fact plus other relevant information.

1. Click the **Reporter** tab.
2. Complete the following fields:

| Field Name | Information to Enter/Select | Notes |
|---|-----------------------------|-------|
| The Reporter is a Mandated Reporter | Select this check box | |
| The Mandated Reporter was Informed of the Information He/She is Entitled to Receive | Select this check box | |
| The Mandated Reporter Requested this Information | Select this check box | |
| Reporter Type | Nurse | |

3. To complete the **Reporter Name** field, click the **Search Person** button beside it. The Person Search screen appears.
4. Complete the following fields:

| Field Name | Information to Enter/Select | Notes |
|------------|-----------------------------|-------|
| Last Name | <i>Ricker##</i> | |
| First Name | <i>Claudia</i> | |

5. Click **Search**.
6. Find Claudia in the search results and click the **select** link beside her name. SACWIS returns to the **Reporter** tab and displays Claudia as the reporter.
7. To complete the **Organization Name** field, click the **Search Provider** button beside it. The Provider Profile Search screen appears.
8. Enter *Mercy Hospital##* in the **Provider Name** field.
9. Click **Search**. SACWIS displays Mercy Hospital in the Provider Profile Search Results table.
10. Click the **select** link for Mercy Hospital. SACWIS returns to the **Reporter** tab and displays the hospital's name and address.

11. Click **Apply**.

Result SACWIS saves your work without leaving the **Reporter** tab.

Task 3. Add participants to the intake

The infant, known as “Baby Doe,” is the only participant. Add her to the intake as a participant and create a person record for her in SACWIS.

1. Click the **Participants** tab.
2. Click **Add Participant**. The Participant Details screen appears.
3. Complete the following fields:

| Field Name | Information to Enter/Select | Notes |
|-----------------|--|---|
| First Name | <i>Baby</i> | |
| Last Name | <i>Doe (IN)##</i> | |
| Gender | Female | |
| Available Roles | Child subject of a non-CA/N Intake (child subject) | Click Add> to move your selection to the Selected Roles field. |

4. Click **OK**. SACWIS returns to the **Participants** tab.
5. Click the **search** link for Baby Doe. The Person Search screen appears. Baby Doe’s name and gender are already entered in the appropriate fields on the screen
6. Click **Search**. No results are found.
7. Click **Add Person**. SACWIS displays the Person Information screen. Again, the infant’s name and gender prepopulate the appropriate fields.
8. Click **Save**. SACWIS returns to the **Participants** tab of the intake you’re working on. Information on Baby Doe, including her new Person ID, is displayed in the Participants table.
9. Click **Apply** to save your work.

Result SACWIS saves your work without leaving the **Participants** tab.

Task 4. Mark the intake complete (ready for a screening decision to be made)

You've captured enough information, and now the intake is ready for review by the screening decision maker (SDM).

1. Click the **Basic** tab.
2. Select **Intake Completed by Screener**.
3. Click **Save**.

Result Ohio SACWIS saves the intake and returns to the Intake Workload screen. The intake will now appear in the SDM's workload. You have completed this exercise.

Exercise IN-3. Record an I and/or R intake

Scenario

Mrs. Peterson called to ask about the date and time of parenting classes that begin this week. Create an intake to capture her request.

Tasks

- Task 1. Create the intake
- Task 2. Record information about the caller
- Task 3. Add the caller as a participant
- Task 4. Mark the intake complete (ready for a screening decision to be made)

Task 1. Create the intake

Start by entering key facts on the **Basics** tab and then saving your work. (This exercise begins on the Intake Workload screen where the previous exercise ended.)

1. Click the **Add Intake** button at the bottom of the screen. Ohio SACWIS displays the **Basic** tab for entering intake information.
2. Complete the following fields with the data provided below:

| Field Name | Information to Enter/Select | Notes |
|------------------|---|------------------------|
| Received | 10/31/2005, 2:15 PM | |
| Intake Method | Phone | |
| Intake Category | Information and/or Referral | |
| Intake Type | Information Only | Click Add> . |
| Intake Narrative | Caller needs information regarding the date and time of the parenting classes that begin later this week. | |

Note

Ohio SACWIS generates an ID number for the intake when you click **Apply**. Write this number down on a post-it note.

3. Click **Apply**.

Result Ohio SACWIS saves the intake and generates an Intake ID number, which is displayed at the top of the **Basic** tab. The intake will now be displayed in the list on the Intake Workload page.

Task 2. Record information about the caller

The caller is defined as the reporter in this situation.

1. Click the **Reporter** tab.
2. Complete the following fields:

| Field Name | Information to Enter/Select | Notes |
|---------------|-----------------------------|-------|
| Reporter Type | Parent | |

3. To complete the **Reporter Name** field, click the **Search Person** button beside it. The Person Search screen appears.
4. Complete the following fields:

| Field Name | Information to Enter/Select | Notes |
|------------|-----------------------------|-------|
| Last Name | Peterson (IN)## | |
| First Name | Jane | |

5. Click **Search**.
6. Jane does not have a record in SACWIS, so click **Add Person**. The Person Information screen appears. Jane's first and last names prefill the appropriate fields.
7. In the **Gender** field, select Female.
8. Click **Save**.

Result SACWIS saves your work and returns to the **Reporter** tab.

Task 3. Add the caller as a participant

Add the caller to the intake as a participant and link her person record (she already has one) to the intake.

1. Click the **Participants** tab.
2. Click **Search Person**. The Person Search screen appears.
3. Complete the following fields:

| Field Name | Information to Enter/Select | Notes |
|------------|-----------------------------|-------|
| Last Name | <i>Peterson (IN)##</i> | |
| First Name | <i>Jane</i> | |

4. Click **Search**. SACWIS displays Jane’s record.
5. Select her record by clicking the check box and click **Select**. SACWIS returns to the **Participants** tab, which displays Jane as a participant.
6. Click the **edit** link beside Jane’s name. The Participant Details screen appears.
7. In the **Available Roles** field, select Parent.
8. Click **Add>** to move your selection to the **Selected Roles** field.
9. Click **OK** to return to the **Participants** tab.
10. Click **Apply** to save your work.

Result SACWIS saves your work without leaving the **Participants** tab.

Task 4. Mark the intake complete (ready for a screening decision to be made)

You've captured enough information, and now the intake is ready for review by the screening decision maker (SDM).

1. Click the **Basic** tab.
2. Select **Intake Completed by Screener**.
3. Click **Save**.

Result Ohio SACWIS saves the intake and returns to the Intake Workload screen. The intake will now appear in the SDM's workload. You have completed this exercise.

