
Ohio SACWIS Project

SACWIS Screen Specification -
CM20b-Maintain Child Adoption Case
(UC434)

Version 1.2

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Prepared For:



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REVISION LOG

Version	Date	A/D/C (Add, Delete, Change)	Author	Document Section #	Description
1.0	04/11/05	A	E. Polk	All sections	Initial Version
1.1	04/12/05	C	E. Polk	All	Updates from internal team review
1.2	04/14/05	A/D/C	Jitendra	Sections 1 and 2	Made changes to reflect the input on Day 3 and 4

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1 Screen Details

1.1 Screen Prototype

1.1.1 CM20b-S01 Case Overview Page

Case Overview

[Activity Log](#)

[Forms/Notices](#)

[Case Services](#)

[Case Plan](#)

[SAR](#)

[Placement Decision/ Staffing](#)

[Adoption Home Selection](#)

Case Overview

Case ID:	243089	Case Status:	Open
Case Name:	Lamb, Raymond Jack	Case Category:	Adoption
		Agency:	Franklin CDJFS

Member Details
[Link to Original Case](#)

[View Assignment History](#)

Worker Name	Role	Agency Of Worker
Doe, John	Adoption Worker	Hamilton County
Simson Aiden	Adoption Worker	Summit County

Close

1.1.2 Screen Fields – CM20b-S01 Case Overview Page

Class. Attribute Name	Display Name	Align	Size	Read Only	Tab Order	Calculation	Edit Mask	Validation	Def Val	
	Case ID	N/A	N/A	T	0			Read Only; Case Header		
	Case Name	N/A	N/A	T	0			Read Only; Case Header		
	Case Category	N/A	N/A	T	0			Read Only; Case Header		
	Case Status	N/A	N/A	T	0			Read Only; Case Header		
	Agency	N/A	N/A	T	0			Read Only; Case Header		
	Worker Name	N/A	N/A	T	0			Grid Column Heading; values in column include assigned worker names		
	Role	N/A	N/A	T	0			Grid Column Heading; values in column include role of assigned worker		
	Agency of Worker	N/A	N/A	T	0			Grid Column Heading; values are agency of assigned worker		
	<u>View Assignment History</u>	N/A	N/A	T	0			Hyperlink;Opens Assignment History page		
	<u>Link to Original Case</u>	N/A	N/A	T	0			Hyperlink;Opens IN07 for the original case.		

1.1.3 CM20b-S02 Case Member List Page

Case Overview Activity Log Forms/Notices <hr/> Case Services Case Plan SAR Placement Decision/ Staffing Adoption Home Selection	Members	Case Closure							
	Case ID:	243089	Case Status:	Open					
	Case Name:	Lamb, Raymond Jack	Case Category:	Adoption					
	Case Members List								
	<table border="1"> <thead> <tr> <th>Name</th> <th>Person ID</th> </tr> </thead> <tbody> <tr> <td>Raymond Jack Lamb</td> <td>123456</td> </tr> <tr> <td>Sebastian James Lamb</td> <td>123457</td> </tr> </tbody> </table>				Name	Person ID	Raymond Jack Lamb	123456	Sebastian James Lamb
Name	Person ID								
Raymond Jack Lamb	123456								
Sebastian James Lamb	123457								
<input type="button" value="Close"/>									

1.1.4 Screen Fields-CM20b-S02 Case Member List Page

Class Attribute Name	Display Name	Align	Size	Read Only	Tab Order	Calculation	Edit Mask	Validation	Def Val	
	Case ID	N/A	N/A	T	0			Read Only; Case Header; System Generated number for the adoption case.		
	Case Name	N/A	N/A	F	0			Read Only; Case Header		
	Case Category	N/A	N/A	T	0			Read Only; Case Header		
	Case Status	N/A	N/A	T	0			Read Only; Case Header		
	Case Members List	N/A	N/A	T	0			Section Heading		

Class Attribute Name	Display Name	Align	Size	Read Only	Tab Order	Calculation	Edit Mask	Validation	Def Val
	Name	N/A	N/A	T	0			Grid Column Heading; Values are the case members in case; name is also a hyperlink to navigate to the member details page for each case member	
	Person ID	N/A	N/A	T	0			Grid Column Heading; Values are Person ID numbers for each case member	

1.1.5 CM20b-S03 Members Details page

Members Details Page

Case ID: 243089

Case Name: Lamb, Raymond Jack

Case Status: Open

Case Category: Adoption

Member Details

Name	Person ID	DOB	Gender	Permanent Custody Date	SSN	
Raymond Jack Lamb	123456	01/02/03	Male	01/02/03	020-09-5523	Adoption Details

Close

- Medical
- Court
- Removal
- Independent Living
- Placement
- Education
- Person Management
- Eligibility
- Child Study Inventory
- Pre-Finalization Information
- Visitation Plan
- Forms

1.1.6 Screen Fields - CM20b-S03 Members Details page

Class Attribute Name	Display Name	Align	Size	Read Only	Tab Order	Calculation	Edit Mask	Validation	Def Val	
	Case ID	N/A	N/A	T	0			Read Only; Case Header; System Generated number for the adoption case.		
	Case Name	N/A	N/A	F	0			Read Only; Case Header		
	Case Category	N/A	N/A	T	0			Read Only; Case Header		
	Case Status	N/A	N/A	T	0			Read Only; Case Header		
	Member Details	N/A	N/A	T	0			Section Heading		
	Name	N/A	N/A	T	0			Grid Column Heading; Value is the case member selected from the Member List page		
	Person ID	N/A	N/A	T	0			Grid Column Heading; Value is the Person Id of the Person selected from the Member List page		
	DOB	N/A	N/A	T	0			Grid Column Heading; Value is the DOB of the Person selected from the Member List page		
	Gender	N/A	N/A	T	0			Grid Column Heading; Value is the Gender of the Person selected from the Member List page		
	Permanent Custody Date	N/A	N/A	T	0		mm/dd/yyyy	Grid Column Heading; value is the		

Class Attribute Name	Display Name	Align	Size	Read Only	Tab Order	Calculation	Edit Mask	Validation	Def Val	
								Permanent Custody "Effective date" entered in legal status Details page for the Person selected from the Member List Page.		
	SSN	N/A	N/A	T	0			Grid Column Heading; Value is the SSN of the Person selected from the Member List page		
	<u>Adoption Details</u>	N/A	N/A	F	0			Hyperlink; opens Adoption Details page		

1.1.7 CM20b-S04 Adoption Details-Recruitment Page

ADOPTION DETAILS PAGE

Recruitment

Siblings

Birth Parents

Adoption Subsidy

Person ID : 123456 Child Name : Lamb, Raymond Jack

Recruitment Activities

Flyers

Media Activities

Adoption Resource Exchange

Regional

National

Adoption Picnic, Fair, Events

Locating Extended Family

Locating Interested Non-Relative(s)

OAPL Registration

Registration Date:

Own Agency Website

Adopt OHIO Website

Adopt USkids Website

Notified Caregiver(s) that child is available for adoption

Other

1.1.8 Screen Fields - CM20b-S04 Adoption Details-Recruitment Page

Class Attribute Name	Display Name	Align	Size	Read Only	Tab Order	Calculation	Edit Mask	Validation
	Person ID	N/A	N/A	T	0			Read Only; Page Header; Person I the Child in focu
	Child Name	N/A	N/A	T	0			Read Only; Page Header; Name o in focus

Class Attribute Name	Display Name	Align	Size	Read Only	Tab Order	Calculation	Edit Mask	Validation	
	Recruitment Activities	N/A	N/A	T	0			Section Heading	
	Flyers	N/A	N/A	F	0			User Entered Ch box; Not Required; default Value	
	Text box	N/A	3000	F	0			User Entered Text; Not Required; No default Value; re Business Rule set	
	Media Activities	N/A	N/A	F	0			User Entered Ch box; Not Required; default Value	
	Text box	N/A	3000	F	0			User Entered Text; Not Required; No default Value; re Business Rule set	
	Adoption Resource Exchange	N/A	N/A	F	0			User Entered Ch box; Not Required; default Value; Re Business Rule set	
	Regional	N/A	N/A	F	0			User Entered Ch box; Not Required; default Value; Re Business Rule set	
	Text box	N/A	3000	F	0			User Entered Text; Not Required; No default Value; re Business Rule set	
	National	N/A	N/A	F	0			User Entered Ch box; Not Required; default Value; Re Business Rule set	
	Text box	N/A	3000	F	0			User Entered Text; Not Required; No default Value; re Business Rule set	
	Adoption Picnic, Fair, Events	N/A	N/A	F	0			User Entered Ch box; Not Required; default Value	

Class Attribute Name	Display Name	Align	Size	Read Only	Tab Order	Calculation	Edit Mask	Validation	
	Text box	L	3000	F	0			User Entered Te: Not Required; N default Value; re Business Rule se	
	Locating Extended Family	N/A	N/A	F	0			User Entered Ch box; Not Requir default Value	
	Text box	N/A	3000	F	0			User Entered Te: Not Required; N default Value; re Business Rule se	
	Locating Interested Non-Relatives	N/A	N/A	F	0			User Entered Ch box; Not Requir default Value	
	Text box	L	3000	F	0			User Entered Te: Not Required; N default Value; re Business Rule se	
	OAPL Registration	N/A	N/A	F	0			User Entered Ch box; Not Requir default Value; re Business Rule se	
	Text box	L	3000	F	0			User Entered Te: Not Required; N default Value; re Business Rule se	
	Registration Date	L	N/A	F	0		MM/DD/YYYY	User Entered Da Required; No de Value; Refer to Business Rule se	
	Own Agency Website	N/A	N/A	F	0			User Entered Ch box; Not Requir default Value	
	Text box	L	3000	F	0			User Entered Te: Not Required; N default Value; re Business Rule se	
	AdoptOHIO Website	N/A	N/A	F	0			User Entered Ch box; Not Requir	

Class Attribute Name	Display Name	Align	Size	Read Only	Tab Order	Calculation	Edit Mask	Validation	
								default Value	
	Text box	L	3000	F	0			User Entered Te: Not Required; N default Value; re Business Rule se	
	AdoptUSkids Website	N/A	N/A	F	0			User Entered Ch box; Not Requir default Value	
	Text box	L	3000	F	0			User Entered Te: Not Required; N default Value; re Business Rule se	
	Notified Caregiver(s) that child is available for adoption	N/A	N/A	F	0			User Entered Ch box; Not Requir default Value	
	Text box	L	3000	F	0			User Entered Te: Not Required; N default Value; re Business Rule se	
	Other	N/A	N/A	F	0			User Entered Ch box; Not Requir default Value; re Business Rule se	
	Text box	L	3000	F	0			User Entered Te: Not Required; N default Value; re Business Rule se	

1.1.9 CM20b-S05 Adoption Details-Sibling Information Page

ADOPTION DETAILS PAGE

Recruitment	Siblings	Birth Parents	Adoption Subsidy
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Person ID : 123456 Child Name : Lamb, Raymond Jack

Sibling Information

	Name	DOB	Age	Relationship	Legal Status	Current Placement	Include in Sibling Group	
edit delete	Sebastian James Lamb	01/02/03	2	Brother	Permanent Custody	Smith, Mary Joseph	No	Visitation Plan
edit delete	Carrie Ann Lamb	01/02/04	1	Half Brother	Permanent Custody	Smith, Mary Joseph	Yes	Visitation Plan

1.1.10 Screen Fields - CM20b-S05 Adoption Details-Sibling Information Page

Class Attribute Name	Display Name	Align	Size	Read Only	Tab Order	Calculation	Edit Mask	Validation
	Person ID	N/A	N/A	T	0			Read Only; Page Header; Person ID of the Child in focus
	Child Name	N/A	N/A	F	0			Read Only; Page Header; Name of child in focus
	Sibling Information	N/A	N/A	T	0			Section Heading
	Name	N/A	N/A	T	0			Grid Column Heading; Displays the names of all the existing siblings or

Class Attribute Name	Display Name	Align	Size	Read Only	Tab Order	Calculation	Edit Mask	Validation	
								the names brought back from person search function	
	DOB	N/A	N/A	T	0		Mm/dd/yyyy	Grid Column Heading; values include member DOB from person record	
	Age	N/A	N/A	T	0			Grid Column Heading; values include system derived value from DOB	
	Relationship	N/A	N/A	T	0			Grid Column Heading; Displays existing relationship values or the values entered on the Siblings Details Page.	
	Legal Status	N/A	N/A	T	0			Grid Column Heading; Values include current legal status of member from legal status Details page for that sibling	
	Current Placement	N/A	N/A	T	0			Grid Column Heading; values include current open placement on members placement record (Refer to CM09 Use case)	
	Include in Sibling Group	N/A	N/A	T	0			Grid Column Heading; display Yes/No based on checkbox selection	

Class Attribute Name	Display Name	Align	Size	Read Only	Tab Order	Calculation	Edit Mask	Validation
								of the 'Include in Sibling Group' on the Sibling Details Page.
	<u>Visitation Plan</u>	N/A	N/A	T	0			Hyperlink; opens visitation plan records for that child in View mode (Refer to CM45Use Case)
	<u>Edit</u>	N/A	N/A	T	0			Hyperlink; allows edit of the sibling information on the Sibling Details page
	<u>Delete</u>	N/A	N/A	T	0			Hyperlink; removes record from sibling Information grid

1.1.11 CM20b-S06 Adoption Details-Sibling Details Page

Sibling Details

Sibling Name: Sebastian James Lamb

Relationship*: Half Brother Include in Sibling Group

1.1.12 Screen Fields - CM20b-S06 Adoption Details-Sibling Details Page

Class Attribute Name	Display Name	Align	Size	Read Only	Tab Order	Calculation	Edit Mask	Validation	
	Sibling Details	N/A	N/A	T	0			Section Heading;	
	Sibling Name	N/A	N/A	F	0			Displays the names of the siblings brought back from person search function; Required; No Default Value;	
	Relationship	N/A	N/A	F	0			User selected drop down box;	

Class Attribute Name	Display Name	Align	Size	Read Only	Tab Order	Calculation	Edit Mask	Validation
								Required; No Default Value.
	Include in Sibling Group	N/A	N/A	F	0			User selected Check box; Not Required; No Default Value; Refer to Business Rule section.

1.1.13 CM20b-S07 Adoption Details-Birth Parents Page

ADOPTION DETAILS PAGE

Recruitment	Siblings	Birth Parents	Adoption Subsidy
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Person ID : 123456 Child Name : Lamb, Raymond Jack

Birth Mother

Birthdate: 4/1/1976
Age at Child's Birth: 21
 Mother is Deceased
Deceased Date: 00/00/0000
Race: Alaskan Native
Mother Married at Child's Birth: Yes

Birth Father

Birthdate: 4/1/1973
Age at Child's Birth: 25
 Father is Deceased
Deceased Date: 09/12/2003
Race: Alaskan Native

Putative Father Registry Search Requested Date Submitted:

Results:

Additional Comments

1.1.14 Screen Fields - CM20b-S07 Adoption Details-Birth Parents Page

Class Attribute Name	Display Name	Align	Size	Read Only	Tab Order	Calculation	Edit Mask	Validation
	Person ID	N/A	N/A	T	0			Read Only; Page Header; Person ID of the Child in focus
	Child Name	N/A	N/A	T	0			Read Only; Page Header; Name of child in focus
	Birth Mother	N/A	N/A	T	0			Section Heading;
	Birthdate	N/A	N/A	T	0			Read only; Date of birth of the person with relationship of birth (bio) mother of child in focus
	Age at Child's birth	N/A	N/A	T	0	Mother's age-child's age=age at child's birth		Read only; system derived from mother's DOB and child in focus DOB
	Mother is deceased	N/A	N/A	T	0			Read only; Values are populated from the person record
	Deceased Date	N/A	N/A	T	0		Mm/dd/yyyy	Read only; Values are populated from the person record
	Race	N/A	N/A	T	0			Read only; Values are populated from person record of mother
	Mother married at child's birth	N/A	N/A	T	0			Read only; Values are populated from person record of the child (values include Yes/No/Unknown)

Class Attribute Name	Display Name	Align	Size	Read Only	Tab Order	Calculation	Edit Mask	Validation	
	Birth Father	N/A	N/A	T	0			Section Heading	
	Birthdate	N/A	N/A	T	0			Read only; Date of birth of person with relationship of birth (bio) father of child in focus	
	Age at Child's birth	N/A	N/A	T	0	Father's age-child's age=age at child's birth		Read only; system derived from father's DOB and child in focus DOB	
	Father is deceased	N/A	N/A	T	0			Read only; Values are populated from the person record	
	Deceased Date	N/A	N/A	T	0		Mm/dd/yyyy	Read only; Values are populated from the person record	
	Race	N/A	N/A	T	0			Read only; from person record of father	
	Putative Father Registry Search requested	N/A	N/A	F	0			Checkbox selection; Not Required; no default values	
	Date Submitted	L	N/A	F			Mm/dd/yyyy	User entered date field; Not Required; no default; calendar feature for date selection. Refer to Business Rule section;	
	Results	L	300	F				Text entry; not required; No Default Value	
	Additional Comments	L	3000	F				Text entry; not required; No Default Value	

1.1.15 CM20b-S08 Adoption Details-Adoption Subsidy Page

ADOPTION DETAILS PAGE

Recruitment	Siblings	Birth Parents	Adoption Subsidy
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Person ID : 123456 Child Name : Lamb, Raymond Jack

Adoption Subsidy Details

Subsidy Type	Determination	Amount
AA	Ineligible	
SAMS	Eligible	\$222
Non-recurring adoption expenses	Eligible	\$3000
PASSS	Eligible	\$15000

Medicaid Number: 09809987680 Adoption Assistance Agreement Date: 4/1/1976

Additional Comments

Spell Check

Apply Save Cancel

1.1.16 Screen Fields - CM20b-S08 Adoption Details-Adoption Subsidy Page

Class Attribute Name	Display Name	Align	Size	Read Only	Tab Order	Calculation	Edit Mask	Validation
	Person ID	N/A	N/A	T	0			Read Only; Page Header; Person ID of the Child in focus
	Child Name	N/A	N/A	F	0			Read Only; Page Header; Name of child in focus
	Adoption Subsidy Details							Section Header;
	Subsidy Type	N/A	N/A	T	0			Grid Column Heading; Read only; from adoption eligibility record for child in focus (Refer to FM19 Use Case); Refer to Business Rule Section.
	Determination	N/A	N/A	T	0			Grid Column Heading; Read only; from adoption eligibility record for child in focus(Refer to FM19 or FM19a Use Case);
	Amount	N/A	N/A	T	0			Grid Column Heading; Read only; from adoption eligibility record(Refer to FM19 or FM19a Use Case);
	Medicaid Number	N/A	N/A	T	0			Read only; from Medicaid eligibility record for child in focus; (Refer to FM22a Use Case);

Class Attribute Name	Display Name	Align	Size	Read Only	Tab Order	Calculation	Edit Mask	Validation
	Adoption Assistance Agreement Date	L	N/A	T	0		Mm/dd/yyyy	Read only; no default; date adoption agreement signed by adoptive parents(Refer to FM19 Use Case);
	Additional Comments	L	3000	F				Text entry; not required; No Default Value

1.2 Screen Controls – Create Adoption Case

Label	Type	On Click	Tab Order
Case Overview page			
Member Details	Button	Routes user to Case Member List page	10
Close	Button	Closes the current page and returns user to Case workload page.	20
Case Members list page			
Close	Button	Closes the current page and returns user to Case Overview page.	10
Member Details Page			
Close	Button	Closes the current page and returns user to Case Member List page.	10
Adoption Details-Recruitment Page			

Label	Type	On Click	Tab Order
Apply	Button	Saves and keeps the user on the current page.	
Save	Button	Saves data and returns user to the Member Details page	
Cancel	Button	Cancels and removes all cached and uncached data entered and returns user to the Member Details page	
Adoption Details-Siblings Information Page			
Add Sibling	Button	Opens the Sibling Details page to add the Sibling information	
Apply	Button	Saves and keeps the user on the current page.	
Save	Button	Saves data and returns user to Member Details page	
Cancel	Button	Cancels and removes all cached and uncached data entered and returns user to the Member Details page	
Adoption Details-Siblings Details Page			
Search Person	Button	Routes to Person Search	
OK	Button	Caches the data on the current page and takes back to the Sibling Information page	
Cancel	Button	Cancels and removes all cached and uncached data entered and returns user to the Sibling Information page	
Adoption Details-Birth Parents Page			
Spell Check	Button	Calls spell-check function for text entry correction	
Apply	Button	Saves and keeps the user on the current page.	
Save	Button	Saves data and returns user to Member Details page	
Cancel	Button	Cancels and removes all cached and uncached data entered and returns user to the Member Details page	
Adoption Details-Adoption Subsidy Page			
Spell Check	Button	Calls spell-check function for text entry correction	
Apply	Button	Saves and keeps the user on the current page.	
Save	Button	Saves data and returns user to Member Details page	
Cancel	Button	Cancels and removes all cached and uncached data	

Label	Type	On Click	Tab Order
		entered and returns user to the Member Details page	

2 General Requirements

2.1 Business Rules

- When a recruitment activity is selected on the recruitment page, a text box is enabled to allow the user to document details about the specific recruitment activity.
- When Adoption Resource Exchange recruitment activity is checked then the Regional and National sub-checkboxes under Adoption Resource Exchange recruitment activity will be enabled and at least one of the sub-checkboxes needs to be selected.
- When Other recruitment activity is checked then the Textbox narrative is required to be filled.
- When OAPL Registration recruitment activity is checked then the Registration Date is required.
- At least one recruitment activity needs to be selected in order to save the recruitment activity record.
- All siblings added to the adoption case at case creation or association should display in the siblings information grid. The system should allow additional siblings to be added to siblings list as needed.
- On the Sibling Details page if the child's legal status is not Permanent Custody and the user selects the Check box 'Include in Sibling Group' then the system should display an error message.
- If the 'Putative Father Registry Search Requested' check box is checked then the 'Date Submitted' is required.
- On the Adoption Subsidy Page the Subsidy Type should be populated with only the following values; "AA", "SAMS", "Non-recurring adoption expenses" and "PASSS".

2.2 Security Requirements

- None

2.3 Alerts and Automatic Messages

2.4 Performance

This screen conforms to the standard performance requirements for all Ohio SACWIS screens, as defined in the Supplementary Requirements Specification

3 Notes and Assumptions

Adoption Process and Planned Use Cases

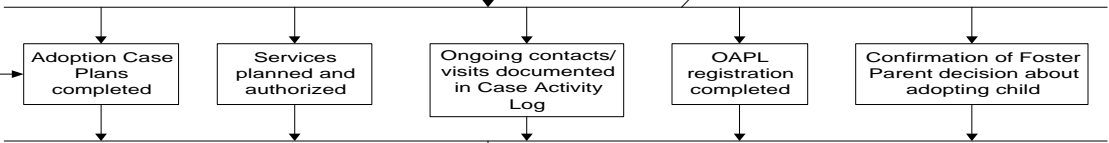
Child placed in Permanent Custody of PCSA after TPR

Adoption Case created for child; adoption worker assigned to case

CM20a-Create Child Adoption Case

Adoption Case maintained and casework documented in SACWIS

CM20b-Maintain Child Adoption Case



Child Study Inventory/ Face Sheet completed

CM20e-Maintain Child Study Inventory

Child/Home Matching process completed in SACWIS

CM20c-Perform and Record Child Adoption Placement Matching

Placement Staffing/ Decision Process documented

CM20d-Record Child Adoption Placement Decision Process

Home selected/child placed

Adoption Placement Agreement signed

Placement recorded

Adoption Assistance negotiated/ agreement signed

Supervision of placement/ documentation in Case Activity Log

Casework continues

Adoption to be finalized

CM20b-Maintain Child Adoption Case

Pre-Finalization Report prepared and sent to Court

CM20f-Maintain Pre-Finalization Information

Adoption Finalized/ Recorded in SACWIS

Case Closed/Record Secured

CM20g-Sealing/ Securing Adoption Case (case closure)

CM20h-Maintain Private Adoption Agency Information (to be defined as separate process)

