

Ohio SACWIS Project
CM20c Perform and Record Child
Adoption Placement Matching
(UC435)
Version 1.0

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Revision Log

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1.0	05/01/2005	A/D/C	Jitendra Nevgi	All	Pre-JAD Version

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1 Description

This use case will include the system processing of matching the child with potential placement resources based on age range, gender, sibling grouping, and child characteristics. This will provide a baseline match for staff to use in planning for staffing and placement decision making for the child.

2 Characteristic Information



Name	CM20c Perform and Record Child Adoptive Placement Matching (UC435)
Scope	Business – Case Management 
Level	Primary Function 
Actors	<ol style="list-style-type: none"> 1. Worker 2. Supervisor 3. Adoption Worker
Supporting Actors	N/A
Stakeholders and Interests	PCSA's, PCPA's, ODJFS, PNA's
Pre-conditions	The Case and case participant(s), have been established as selectable entities within OH SACWIS. The system has presented the Provider directory.
Post-conditions	The System provides potential matches results based on the search criteria.
Trigger(s)	The actor requests the system to present the Adoption Match results.
Requirements Addressed	274.5, 274.6, 348, 363, 214, 723.1, 461, 487, 487.1

Figure 1 – CM20c Perform and Record Child Adoptive Placement Matching (UC435)

3 Basic Flow

3.1 Usage Examples and Narratives

Scenario 1: Access and record the search process for potential adoptive families

Scenario 2: Perform the search for potential adoptive families

Scenario 3: View the criteria of the match for potential adoptive families

Scenario 4: Edit the Pre-matching decision record.

Scenario 5 View the Pre-matching decision record.

3.2 Main Success Scenarios

Scenario 1: Access and record the Search process for potential adoptive families

1. The actor accesses a case from either:
 - Via workload using **CFxxx – View Workload**
 - Via IN09 - Find a case
2. The actor chooses to navigate to the Search Potential Adoptive Families Selection page by selecting the search potential adoptive families' hyperlink on the Case Overview page.
3. The System presents the Search Potential Adoptive Families Selection page.
4. The actor optionally executes one of Scenarios 2, 3, 4 or 5.
5. The actor requests System to close the Search Potential Adoptive Families Selection page.
6. The System closes the Search Potential Adoptive Families Selection page and returns to the Case Overview page.
7. Use Case Completed Successfully.

Alternate Flows:

There are no Alternate Flows for this scenario.

Scenario 2: Perform the search for potential adoptive families

1. The actor selects the child and requests the system to present the page for performing the search for potential adoptive families by selecting the Search Families button.
2. System presents Match Provider page (RM19a-Match Client with Provider) pre-filled with Service Information, Agency Information and Child Information. (Note: Refer to the 5.9 section of this document to find out the information pre-filling on the current page).
3. The actor executes steps 3 to 14 of Scenario 2 of RM19a Use Case.
4. The actor requests System return information to the Search Potential Adoptive Families Selection page.
5. The System returns information to the Search Potential Adoptive Families Selection page.
6. The actor opts to apply the information.
7. The system accepts the information.
8. Return to MSS1, step 5

Alternative flows for Scenario 2:

3.a The actor opts to cancel the search.

3a.1 The system presents a confirmation message asking the user to confirm the request to cancel

3a.2 The user continues with the cancellation.

3a.2a The user aborts the cancel.

3a.2a.1 The system closes the confirmation message and returns the user to the Match Provider page.

3a.2a.2 Return to MSS 2, step 3

3a.3 The system closes the Match Provider page and returns the actor to the Search Potential Adoptive Families Selection page.

3a.4 Use Case Completed Successfully.

6.a The actor opts to cancel the changes.

6a.1 The system presents a confirmation message asking the user to confirm the request to cancel

6a.2 The user continues with the cancellation.

6a.2a The user aborts the cancel.

6a.2a.1 The system closes the confirmation message and returns the user to the Search Potential Adoptive Families Selection page.

6a.2a.2 Return to MSS 2, step 6

- 6a.3 The system closes the Search Potential Adoptive Families Selection page, the information is not saved, and returns the actor to the Case Overview page*
- 6a.4 Use Case Completed Successfully.*

6b. The actor opts to save the information.

- 6b.1 The system accepts the record, closes the current page, and returns the actor to the Case Overview page..*
- 6b.2 Use Case Completed Successfully.*

Scenario 3: View the criteria of the match for potential adoptive families

1. The actor requests the system to view the match criteria by selecting the View Criteria hyperlink on the Search Potential Adoptive Families Selection page.
2. The system presents the Match Provider page in view mode. (Note – The system should display the search criteria which was selected while saving the match record).
3. The actor views the matched criteria and requests to close the Current page.
4. The system closes the current page, and returns the actor to the Search Potential Adoptive Families Selection page.
5. Return to MSS1, step 5

Alternative flows for Scenario 3:

There are no Alternate Flows for this scenario.

Scenario 4: Edit the Pre-Matching decision record

1. The actor requests the system to “Edit” the selected Pre-Matching record on the Search Potential Adoptive Families Selection page.
2. The system presents the Pre-Matching Decision page.
3. The actor enters information in the data fields present on the Pre-Matching Decision page.
4. The actor opts to select the OK button on the current page.
5. The system caches the data entered and closes the current page and navigates back to the Search Potential Adoptive Families Selection page.
6. The actor opts to apply the information.
7. The system accepts the information.
8. Return to MSS1, step 5

Alternative flows for Scenario 4:

- 4.a The actor opts to cancel editing the record.*
 - 4a.1 The system presents a confirmation message asking the user to confirm the request to cancel*
 - 4a.2 The user continues with the cancellation.*
 - 4a.2a The user aborts the cancel.*
 - 4a.2a.1 The system closes the confirmation message and returns the user to the data entry page displaying the data that had been entered.*
 - 4a.2a.2 Return to MSS 3, step 4*
 - 4a.3 The system closes the data entry page, the new changes are not saved, and returns the actor to the Search Potential Adoptive Families Selection page.*
 - 4a.4 Use Case Completed Successfully.*

- 6.a The actor opts to cancel the changes.*
 - 6a.1 The system presents a confirmation message asking the user to confirm the request to cancel.*
 - 6a.2 The user continues with the cancellation.*
 - 6a.2a The user aborts the cancel.*
 - 6a.2a.1 The system closes the confirmation message and returns the user to the Search Potential Adoptive Families Selection page.*
 - 6a.2a.2 Return to MSS 3, step 6*
 - 6a.3 The system closes the Search Potential Adoptive Families Selection page, the information is not saved, and returns the actor to the Case Overview page.*
 - 6a.4 Use Case Completed Successfully.*

- 6b. The actor opts to save the information.*
 - 6b.1 The system accepts the record, closes the current page, and returns the actor to the Case Overview page..*
 - 6b.2 Use Case Completed Successfully.*

Scenario 5: View the Pre-Matching decision record

1. The actor requests the system to “View” the selected Pre-Matching record on the Search Potential Adoptive Families Selection page.
2. The system presents the Pre-Matching Decision page in view mode.
3. The actor views the record and requests to close the Pre-Matching Decision page.
4. The system closes the current page, and returns the actor to the Search Potential Adoptive Families Selection page.
5. Return to MSS1, step 5

Alternative flows for Scenario 5:

There are no Alternate Flows for this scenario.

4 Important and Required Fields

MSS or AF Step	Fields
MSS1 Step 4	<p><u>Search Potential Adoptive Families Selection Page</u> Child Name The name of the child(ren) selected while creating an adoption case.</p>
MSS4 Step 3 MSS5 Step 3	<p><u>Pre-Matching Decision Page</u> Provider Name Name of the Provider Record Consider for Matching Conference This field states if the Pre-Matching decision record should be considered for matching conference. Reason for Non-consideration This field states the reason for non-consideration of the Pre-Matching decision record. Decision Date The date decision was made for Matching Conference Provider ID Specifies a unique provider record to be selected Worker Name The name of the worker who logged on to the system. Additional Comments Any Additional Comments surrounding the Pre-Matching decision.</p>

Figure 2 – Important Fields

5 Special Requirements

5.1 Root Search Functionality

The Worker can perform a wild card on the Provider Name.

5.2 Provider Name and Member Name Info are mutually exclusive

If the worker previously entered information into the Member Name fields (First and Last) and decided to enter Provider Name information, the Provider Name information will override the Member Name information.

5.3 Provider ID is mutually exclusive

When the Worker enters a value in this field, all other fields except Service Category and Service Type are ignored and any information previously entered is removed.

5.4 Agency Type-Agency Filter rule

When the Worker enters a value in the Agency Type field, the Agency field will become enabled and filtered based on the Agency Type.

5.5 Search Results rule

The System should only return Providers that meet the following criteria:

1. The Provider Type Status is Approved/Certified/Active.
2. The Provider Status is Active or On Hold.
3. The Service Type identified in the Match Criteria is currently documented in the Service Credentials record of the Provider.

The System will not allow selection of Providers (for data retrieval purposes) who have 'Inactive' service category/type information for the employing agency of the Worker performing the search/selection.

The System should display the recommending agency of the Provider Type for the returned Provider Record. This rule applies to Home and Residential Providers. When a Provider is a Non-ODJFS Provider the Agency field will appear empty.

The System will return only the most current status record for the Provider.

5.6 Report Rules

The Generate Report function is only enabled upon search results being returned. When the Clear Form button is used the Generate Report button will again become disabled until a successful search is conducted where search results are returned.

5.7 Search Process Rule

For all Home Providers, the System should match the Gender, From Age and To Age fields of the Match screen against the Usage Placement Criteria. The Race and the

ethnicity field will be matched against the Provider's Acceptance Characteristics. All other Child Characteristics information will be matched against the current Acceptance Characteristics record where the Service Type is associated to the Provider Type for the Home Provider whenever the Service Type = Adoptive Care the Provider Type = Adoptive Home.

All other Child Characteristics information will be matched against the current Acceptance Characteristics record.

For Non-ODJFS Providers, the Usage Placement Criteria and Acceptance Characteristics records will not be used for matching purposes. The Race and the ethnicity field will also not be matched against.

Based on the above information, the System should only return those children that match.

5.8 Link Provider Rules

The System should pre-fill the following information from the Adoption Record into the identified fields of the Provider Match page.

Will pre-fill the Provider Match Page
Service Category = Placement Services
Service Type = Adoptive Care
Agency Type = The Employing Agency Type of the logged on worker
Agency = The Employing Agency of the logged on worker
From Age = Child's Age
Gender = Child's Gender identified in PM01
Language = Child's Language identified in PM01
Race Checkboxes = Child's Race identified in PM01
Ethnicity Checkboxes = Child's Ethnicity identified in PM01
Characteristics to be used in Match = Characteristics identified for that person in PM01
Available Characteristics = All the available Characteristics identified in PM01

The System will not allow the user to modify the Service Category or Service Type information and will not allow modification of the Child's Age, Gender, Language or Race, ethnicity fields.

6 Notes, Background Information, Worker Interface Ideas

The Match Results should be displayed as blank fields prior to the initial search being conducted.

