

Generating the Agency Safety Plan Report



Knowledge Base Article

Generating the Agency Safety Plan Report

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Generating the Agency Safety Plan Report

Overview

This article describes how to generate the **Agency Safety Plan Report**. The **Agency Safety Plan Report** is a tool for administrators, supervisors, and workers to help manage the **Active** safety plans for their agency. The report offers 2 options.

Option 1 allows the user to generate a report showing all safety plans that were active for the agency for at least one day during the selected parameter period.

Option 2 allows user to generate a report of all current active safety plans for the agency.

Navigating to the Report

1. From the Ohio SACWIS **Home** screen, click the Administration tab.
2. Click the hyperlink for **Agency Safety Plan Report**.

The screenshot shows the Ohio SACWIS interface. At the top, there is a navigation bar with tabs: Home, Intake, Case, Provider, Financial, and Administration. The Administration tab is selected and highlighted with a red box. Below this, there is a sub-navigation bar with tabs: Staff, Maintenance, Security, Reports, Training, and Utilities. The Reports tab is also selected and highlighted with a red box. Below the navigation bars, there is a 'Report Filter Criteria' section with two dropdown menus: 'Report Category:' and 'Report Type:'. Below this, there is a 'Filter' button. The main content area is titled 'Reports' and shows a list of reports. The list has columns for 'Title', 'Category', and 'Type'. The 'Agency Safety Plan Report' is highlighted with a red box in the list.

Title	Category	Type
AA Ceiling Waiver Requests Report *	Fiscal	Agency
AAC Outreach Letter	Fiscal	State
AAC Outreach Report	Fiscal	State
Agency Provider Waiver Report	Administration	State
Agency Safety Plan Contacts Report	Administration	Agency
Agency Safety Plan Report	Administration	Agency
Agency Temporary License Report	Administration	Agency
Assessor Registry Report	Administration	Agency

The **Report Details** screen appears.

3. View a saved report by clicking the **Report ID** hyperlink.
4. Select a **Report Output Format** of PDF or Excel.
5. Create a new report by clicking the **Generate Report** button.

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Administration>Reports

Report Details			
Report Category:	ADMINISTRATION	Report Title:	Agency Safety Plan Report
Report Type:	AGENCY		
Report History			
ID	Date Created	Employee ID	Name
35870718	05/24/2023 10:59 AM		
Document History			
Select Report Output Format			
<input type="radio"/> PDF			
<input checked="" type="radio"/> Excel			
<input type="button" value="Generate Report"/>			
<input type="button" value="Cancel"/>			

The **Active Safety Plan Report** parameter screen appears.

Agency Safety Plan Report	
Filter Options Applicable to Option 1 and Option 2	
Agency: *	<input type="text"/>
Supervisor:	<input type="text"/>
Employee:	<input type="text"/>
Option 1 - Generate report for all safety plans for the agency that were active for at least one day during the selected parameter period.	
Note: Only Safety Plans with an existing Effective Date or End Date will be included in this report. (ie. Safety Plans with a status of In Progress, Complete, or Refused may not be included in this report.)	
Effective Date: *	<input type="text"/>
End Date: *	<input type="text"/>
Option 2 - All selections from Option 1 will be negated.	
<input type="checkbox"/> Generate report for all current active safety plans for agency	
<input type="button" value="Generate Report"/>	<input type="button" value="Cancel"/>

Generating the Agency Safety Plan Report – Option 1

This report option generates all **Safety Plans** that were **Active** for the agency for at least one day during the selected parameter period.

Generating the Agency Safety Plan Report

Important: Only **Safety Plans** with an existing **Effective Date** or **End Date** will be included in this report. (I.e. **Safety Plans** with a status of **In Progress**, **Complete**, or **Refused** may not be included in this report as they are not considered '**Active**').

1. Select the **Agency**.

Note: Only the county of the logged in user will appear in the **Agency** dropdown.

2. Select the **Supervisor**, if needed.
3. Select the **Employee**, if needed.
4. Enter the **Effective Date** (required).
5. Enter the **End Date** (required).

Agency Safety Plan Report

Filter Options Applicable to Option 1 and Option 2

Agency: *
Supervisor:
Employee:

Option 1 - Generate report for all safety plans for the agency that were active for at least one day during the selected parameter period.

Note: Only Safety Plans with an existing Effective Date or End Date will be included in this report. (I.e. Safety Plans with a status of In Progress, Complete, or Refused may not be included in this report.)

Effective Date: *
End Date: *

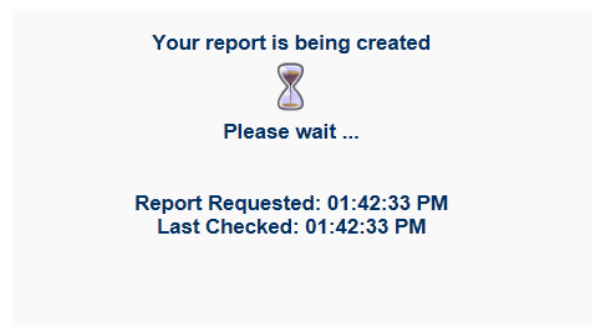
Option 2 - All selections from Option 1 will be negated.

* ☐ Generate report for all current active safety plans for agency

Generate Report Cancel

6. Click the **Generate Report** button.

The **Your report is being created** message appears while the report is generating.



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The **Report Confirmation** screen appears when the report has run successfully.



7. If the report does not open, select the **Click here to open report** link.
8. Click the **Save** button in order to save the generated report to the **Report History**.
9. Select **Review Parameters** to return to the **Report Parameters** screen.

The **Agency Safety Plan Summary Report** appears.

Generating the Agency Safety Plan Report – Option 2

This report option generates all **Current Active Safety Plans** for the agency.

1. Select the **Agency**.
Note: Only the county of the logged in user will appear in the **Agency** dropdown.
2. Check the **Generate for all active safety plans for agency** box.

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Agency Safety Plan Report

Filter Options Applicable to Option 1 and Option 2


Agency: *


Supervisor:

Employee:

Option 1 - Generate report for all safety plans for the agency that were active for at least one day during the selected parameter period.

Note: Only Safety Plans with an existing Effective Date or End Date will be included in this report. (ie. Safety Plans with a status of In Progress, Complete, or Refused may not be included in this report.)

Effective Date: * 

End Date: * 

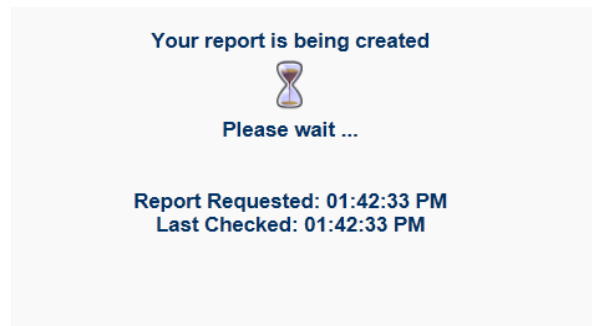
Option 2 - All selections from Option 1 will be negated.

* ☐ Generate report for all current active safety plans for agency

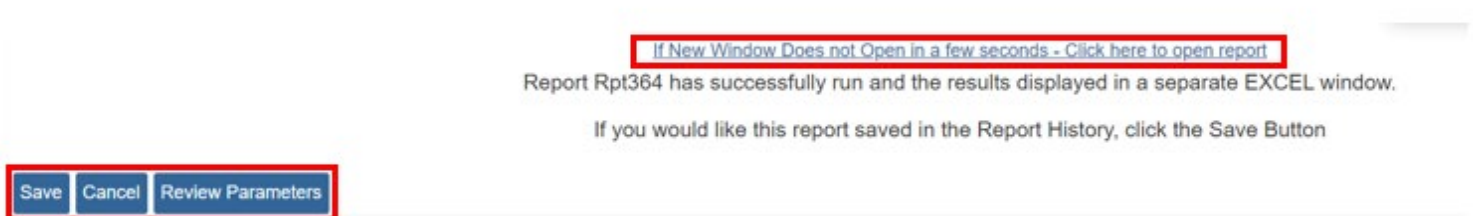
Generate Report **Cancel**

3. Click the **Generate Report** button

The **Your report is being created** message appears while the report is generating.



The **Report Confirmation** screen appears when the report has run successfully.



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4. If the report does not open, select the **Click here to open report** link.
5. Click the **Save** button in order to save the generated report to the **Report History**.
6. Select **Review Parameters** to return to the **Report Parameters** screen.

The **Agency Safety Plan Summary Report** appears.

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at SACWIS_HELP_DESK@jfs.ohio.gov .