

# Keys to Populating Data to the Comprehensive Visitation Report

## Overview

The Office of Families and Children has received a variety of questions from our county partners regarding the **Data Population** that pulls into the SACWIS Comprehensive Visitation Report.

OFC has also received a variety of questions concerning **where** in SACWIS does the data contained in the report pull from. This document is meant to be a guide to help answer those questions. For complete details regarding the generation of this report please see the full Knowledge Base article that can be found by [clicking here](#).

## Determining the Data Population

**Data Population:** SACWIS staff has worked closely with Monitoring and Policy staff to create an accurate population of children and adults requiring a **Monthly** visit. The following criteria have been used to determine inclusion into the reporting population.

- For **Ongoing, Ongoing AR, and Adoption** cases:
  - When **no** children in the case are in agency custody, then all children who are **Active Case Members (Case Participants)** will be included in the report, regardless of whether they are on an active case plan.
  - When **one or more** children in the case are in agency custody, then any children who are **Active Case Members (Case Participants)** but are not in agency custody will only pull into the report **if they are listed as case plan participants**.
- All children who are members of an open case and have a non-end dated **Agency Legal status**, including COPS, TCOPS, and COPS extension.
- All children and adults who are **Case Plan Participants** on an open case regardless of the case category.

**Important:** This report does not account for 7 day and 4-week substitute care visit requirements. In addition, the inclusion or exclusion of a child or an adult from this report does not necessarily mean that the child or adult does or does not require a visit based upon rule (5101:2-38-01 and 5101:2-42-65)

**Note:** The SACWIS Visitation Data presented in the **Comprehensive Visitation Report** is refreshed via a nightly batch job. This means that the report does not include the current day's visitation data. Visitation information entered into SACWIS over a weekend will be available the morning **following** the first business day of the week.

# Keys to Populating Data to the Comprehensive Visitation Report

## Data Population 1: All Children who are Active Case Members of an Ongoing, Ongoing AR, or Adoption Case (when no children on the case are in agency custody)

1. From the **Case Overview Screen**, click on the **View Case Information** link.

The screenshot shows the 'Case Overview' screen. On the left is a navigation menu with links like 'Case Overview', 'Activity Log', 'Attorney Communication', etc. The main area displays case details: Case ID, Case Name, Case Address, Case Status (Open), Case Category (Ongoing), Agency (County Department of Job and Family Services), and Geo Code. A red circle highlights the 'View Case Information' link under the 'Case Actions' section.

**Note:** For **Adoption Cases**, select the **View Member Details** link from the Case Overview Screen to view the **Adoption Members** page.

2. From the **Case Detail** page, click on the **Members** tab to view the **Active Case Members List**.

The screenshot shows the 'Case Detail' page with the 'Members' tab selected and circled in red. Below the 'Case Members' section, the 'Active Member List' is highlighted in green. It contains a table with columns: CRP, Person ID, Name, DOB, Age, Gender, Race, Hispanic/Latino, and Begin Date. The table lists four members, with the third member (Age 7) highlighted in green. Below the table are buttons for 'Add Member', 'Copy Address', and 'Copy Phone Number'. At the bottom are 'Apply', 'Save', and 'Cancel' buttons.

CRP	Person ID	Name	DOB	Age	Gender	Race	Hispanic/Latino	Begin Date	
edit				45	Female	White	No	12/07/2007	delete
edit				20	Male	White	No	11/27/2014	delete
edit				7	Male	White	No	12/07/2007	delete
edit				5	Male	White	No	05/25/2010	delete

### Data Population 1 Explained:

Children who are **Active Case Members** of an **Ongoing**, **Ongoing AR**, or **Adoption Case** (as shown outlined in **green** above) are included in the data population for the report regardless of whether or not they are on an active case plan when no children on the case are in agency custody. They will appear in the **Active Case Member List** at the top of the Case Members page.

**Important:** When one or more children on the case are in agency custody, then other children who are **Active Case Members (Case Participants)** will only be included when they are also **Case Plan Participants**.

# Keys to Populating Data to the Comprehensive Visitation Report

Children who are **Inactive Case Members** of an **Ongoing, Ongoing AR, or Adoption Case** (as outlined in **blue** above) are NOT included in the data population of the report. They will appear in the Inactive **Case Member List** in the middle of the page.

**Key to Understanding the Data:** If a person is no longer an **Active Case Member** but they were active for **prior months** during the parameter period selected for the report, they WILL display on the report for the months where they were an **Active Case Member** and the criteria above applies.

**Example:** There is a child listed who became **Inactive** on 06/17/2015. This child would not be counted in the June 2015 percentages, but would be counted in the May 2015 percentages when he was an **Active** member of the case.

Case Members

Active Member List

**Warning:** Changing the Case Reference Person will change the Case Name and Case Address [View Member History](#)

CRP	Person ID	Name	DOB	Age	Gender	Race	Hispanic/Latino	Begin Date	
<a href="#">edit</a>	<input checked="" type="radio"/>			45	Female	White	No	12/07/2007	<a href="#">delete</a>
<a href="#">edit</a>	<input type="radio"/>			20	Male	White	No	11/27/2014	<a href="#">delete</a>
<a href="#">edit</a>	<input type="radio"/>			7	Male	White	No	12/07/2007	<a href="#">delete</a>
<a href="#">edit</a>	<input type="radio"/>			5	Male	White	No	05/25/2010	<a href="#">delete</a>

Inactive Member List

Person ID	Name	DOB	Age	Gender	Race	Hispanic/Latino	Begin Date
			10	Male	White		06/17/2015

## OFC Policy Guidance:

When a PCSA has an open ongoing case, it is best practice for **all children** in the family system to be visited at least monthly, regardless of whether the children are included in the data population for the report.

# Keys to Populating Data to the Comprehensive Visitation Report

## Data Population 2: All Children who are members of an Open Case and have a non-end dated Agency Legal Status

1. Click the **Legal Custody/Status** link in the blue left hand navigation to view children with a current (non-end-dated) legal status.

Case ID: [redacted] Case Status: Open ([redacted])  
Case Name: [redacted] Case Category: [redacted]

Legal Custody and Status Filter Criteria  
 All Persons  Persons with a Current or Historical Legal Status  Persons Under Age 22

Filter

Legal Custody and Status  
Result(s) 1 - 3 of 3 Page 1 of 1

Case Participants	DOB	Custody Start Date	Custody End Date	Legal Status	Agency
[redacted]	[redacted]	[redacted]	[redacted]	Temporary Custody/Placement and Care	County Department of Job and Family Services
[redacted]	[redacted]	Maintain Custody & Status	[redacted]	Temporary Custody/Placement and Care	County Department of Job and Family Services
[redacted]	[redacted]	Maintain Custody & Status	[redacted]	Temporary Custody/Placement and Care	County Department of Job and Family Services

**Data Population 2 Explained:** Regardless of **Case Category**, children who are in an **Agency Legal Status**, meaning they are in the **Custody** or **Court Ordered Protective Supervision** of the agency, are included in the data population for the report.

# Keys to Populating Data to the Comprehensive Visitation Report

## Data Population 3: All Children and Adults who are Case Plan Participants on the current case plan on an Open Case

1. Click the **Case Plan** link in the blue left hand navigation to view the Case Plan(s).
  - **Note:** Case Plans are **Active** when they have a **Type** other than **Closed**

Case Plans

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

Type	Plan	Status	Approved Date	File Date	Agency
Amended	1.05	Approved	06/26/2015		County Department of Job and Family Services

view | copy | reports | amend plan | history |

[Add Case Plan](#)

2. Click the **View** link next to the **Case Plan**
3. From the **Case Plan Topics**, click the **Identifying Information** link

Case Plan Topics

Case Plan Type: Amended Plan Number: 1.05 Status: Approved

Topic	Status
Identifying Information	Provided
Strengths and Concerns	3 Strength(s) / 3 Concern(s) Records Entered
Placement Information	Provided
Placement Visitation	3 Visitation Plan(s) Linked
Caregiver Services	3 Service(s) Linked
Exceptions Information	Provided
Independent Living Information	Provided
Amendment Information	Provided
Court/Signature Details	4 Signature(s) Provided
Family Participation	Provided

[Close](#)

4. The **Identifying Information** screen appears

Identifying Information

Case Plan Type: Amended Plan Number: 1.05 Status: Approved

Child(ren) Participating in the Case Plan

Person ID	Name	DOB	Type of Placement	Child's Permanency Goal	Court Case/ID #
			Certified/Approved Relative -CAR	Return the child(ren) to parent/guardian/or custodian (Reunification)	
			Certified/Approved Relative -CAR	Return the child(ren) to parent/guardian/or custodian (Reunification)	
			Certified/Approved Relative -CAR	Return the child(ren) to parent/guardian/or custodian (Reunification)	

Adult(s) Participating in the Case Plan

Person ID	Name	Relationship to Child	DOB	Age
		relationship		27
		relationship		29

## Keys to Populating Data to the Comprehensive Visitation Report

**Data Population 3 Explained:** Regardless of Case Category, **Children** and **Adults** who are **Case Plan Participants** in the current case plan on an **Open Case** are included in the data population of the report. **Children** who are participating in the Case Plan will appear in the section outlined in **green** below. **Adults** who are participating in the Case Plan will appear in the section outlined in **blue** below.

Identifying Information						
Case Plan Type:*	Amended	Plan Number:	1.05	Status:	Approved	
Child(ren) Participating in the Case Plan						
Person ID	Name	DOB	Type of Placement	Child's Permanency Goal	Court Case/ID #	
			Certified/Approved Relative -CAR	Return the child(ren) to parent/guardian/or custodian (Reunification)		
			Certified/Approved Relative -CAR	Return the child(ren) to parent/guardian/or custodian (Reunification)		
			Certified/Approved Relative -CAR	Return the child(ren) to parent/guardian/or custodian (Reunification)		
Adult(s) Participating in the Case Plan						
Person ID	Name	DOB	Relationship to Child	Age		
			relationship	27		
			relationship	29		

**Key to Understanding the Data:** The report will look at the **Case Plan Participants** for the case plan that was current as of the **last day** of the month. (ie. If the case plan was amended in the middle of the month to add a new participant, the new participant would be required to be seen that month.)

**Policy Guidance:** Many counties have asked how they should reflect parents when their whereabouts are unknown. **Per OFC policy;** the agency is required to make ongoing diligent efforts to locate the parent. If the agency has made ongoing diligent efforts to locate the parent(s) and those efforts have been documented, then the PCSA should complete a **Case Plan Amendment** to remove the parent whose whereabouts are unknown from the case plan; and have the court approve that amendment. If the parent is subsequently located, then another case plan amendment would be needed to add the parent back to the case plan.

**Monitoring Perspective:** For CPOE reviews monitoring is expecting to see a visit for an adult if they are receiving **Case Plan Services** as evidenced by the **narrative** of the case plan. Since SACWIS cannot report based on the case plan narrative, OFC decided to look at **adults who are listed as case plan participants** to determine which adults require monthly visits. Generally speaking, if an adult is listed as a case plan participant, they are likely receiving at least one service from the agency.

**Note:** There are some instances where adults requiring a monthly visit may NOT pull into the report data. **Examples:** A child is in the agency's custody or protective supervision and there is not yet an active case plan. A child is an active member of an Ongoing Case in which a case plan has not yet been developed. The parents of these children would still require a visit.

# Keys to Populating Data to the Comprehensive Visitation Report

## Coding an Activity Log that 'Counts' for the Monthly Visit

It is recommended that **Case Activity Logs** created to document a **Required Monthly Visit** meet standards outlined in [Entering an Activity Log for a Monthly Visit](#).

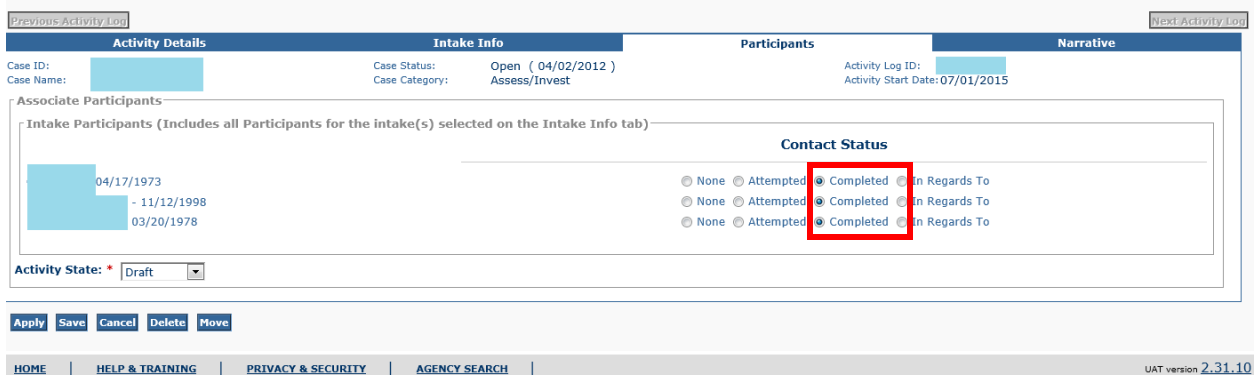
However, in order for a **Case Activity Log** to be counted as a **Completed Visit** in the **Child and Adult Comprehensive Visitation Report**, the following rules apply:

1. The activity log **Status** must be **Completed**.
  - Select Completed from the **Activity State** drop down



A screenshot of a web form showing the 'Activity State' dropdown menu. The word 'Completed' is selected and circled in red. Below the dropdown are buttons for 'Apply', 'Save', 'Cancel', 'Delete', and 'Move'. At the bottom of the page, there is a navigation bar with links for 'HOME', 'HELP & TRAINING', 'PRIVACY & SECURITY', and 'AGENCY SEARCH', along with a 'UAT' version indicator.

2. The Child or Adult in question must be associated to the activity log with a **Contact Status** of **Completed**.



A screenshot of the 'Associate Participants' section in a web application. It shows a table of participants with their birth dates and a 'Contact Status' column. The 'Completed' radio button is selected for each participant and is highlighted with a red box. Below the table is an 'Activity State' dropdown menu set to 'Draft'. At the bottom, there are buttons for 'Apply', 'Save', 'Cancel', 'Delete', and 'Move', and a navigation bar with links for 'HOME', 'HELP & TRAINING', 'PRIVACY & SECURITY', and 'AGENCY SEARCH', along with a 'UAT version 2.31.10' indicator.

Intake Info	Participants	Narrative
Case ID: [redacted] Case Name: [redacted] Case Status: Open ( 04/02/2012 ) Case Category: Assess/Invest	Activity Log ID: [redacted] Activity Start Date: 07/01/2015	
Associate Participants		
Intake Participants (Includes all Participants for the intake(s) selected on the Intake Info tab)		
<b>Contact Status</b>		
[redacted] 04/17/1973	<input type="radio"/> None <input type="radio"/> Attempted <input checked="" type="radio"/> Completed <input type="radio"/> In Regards To	
[redacted] - 11/12/1998	<input type="radio"/> None <input type="radio"/> Attempted <input checked="" type="radio"/> Completed <input type="radio"/> In Regards To	
[redacted] 03/20/1978	<input type="radio"/> None <input type="radio"/> Attempted <input checked="" type="radio"/> Completed <input type="radio"/> In Regards To	

**Key to Understanding the Data:** There is a column in the report that displays the number of **Attempted Visits**. The report WILL count **3 Attempted Visits** as credit for a visit in the monthly visit percentage calculations.

3. The **Activity Log Category** and the **Activity Log Contact Type** cannot be on the exclusion list which is outlined on the next page.

# Keys to Populating Data to the Comprehensive Visitation Report

## Activity Log Categories and Types that DO NOT Count for Monthly Visits

1. If the **Selected Contact Types** (outlined in **green** below) on the Activity Log includes one of the types listed below, this is NOT considered a visit:

- Phone call to
- Phone call from
- Letter to
- Letter from
- Voicemail
- Message
- Supervisor Staffing
- Email
- Fax

The screenshot displays a web form for an Activity Log. The form is divided into several sections: Activity Details, Intake Info, Participants, and Narrative. The 'Contact Types' section is highlighted with a green border and contains two lists: 'Available Contact Types' (with options like Announced Home Visit, Collateral, Court, Critical Safety Issue) and 'Selected Contact Types' (with 'Face-to-Face' selected). The 'Category Information' section is highlighted with a red border and contains a 'Category' dropdown menu set to 'Ongoing Visits' and a 'Case Category' dropdown menu set to 'Assessment/Investigation'. Other sections include 'Create Date', 'Start Activity Date', 'Responsible Worker', 'Contact Duration', 'Location Information', and 'Activity State'.

2. Activity Logs with a **Category** of **Correspondence, Case Transfer, or Case Closure** are NOT considered to be a visit.

- The Category is record in the **Category Drop Down** outlined in **red** above.

**Important:** All remaining Activity Logs are considered visits (as long as the person in question is associated to the activity log with a **Contact Status** of **Completed**).

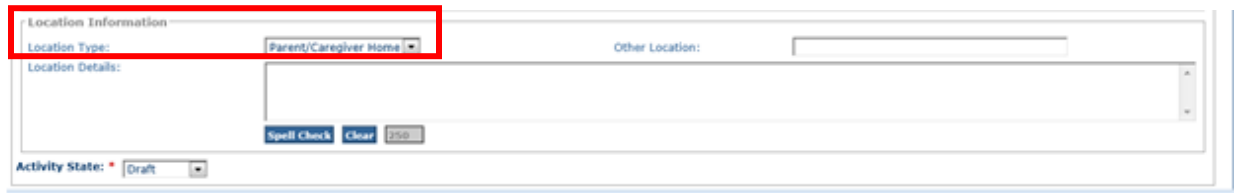


# Keys to Populating Data to the Comprehensive Visitation Report

## Other Important Notes When Coding an Activity Log for a Visit

### Location Type

1. The report does NOT look at the **Location Type** drop down when calculating the **Monthly Visitation Percentages**.
2. However, the report does look at the **Location Type** drop down when calculating specific yes/no values for the report as outlined below.
  - When the **Location Type = Placement Setting** (and the Contact Status is 'Completed' – see previous section), the report will reflect a **'Yes'** for **'Monthly Placement Setting Visit Completed'**
  - When the **Location Type = Parent/Caregiver Home** (and the Contact Status is 'Completed' – see previous section), the report will reflect a **'Yes'** for **'Monthly In Home Visit Completed'**



### Activity Log Contact Status

1. When recording activity logs for **Face-to-Face** visits, please be aware that users should only select an **Activity Log Contact Status** of **Completed** when a **Face-to-Face** contact actually occurred with that participant.



**Important: Indicating a Contact Status of Completed when no Face-to-Face contact occurred may cause the visitation report to falsely indicate that the participant was visited.**

# Keys to Populating Data to the Comprehensive Visitation Report


## Generating the Comprehensive Visitation Report for records out of compliance with Title IV-B Visitation


Users can generate the Comprehensive Visitation Report to find records that are NOT meeting the requirement by the Administration for Children and Families to visit 95% of children in custody each month. Please use the report filters shown below to extract those records. Title IV-B Visitation is calculated on the Federal Fiscal Year (FFY) that runs from October to September each year. Users can run the report from October to the most current completed month within the FFY to obtain records relevant to the FFY. Title IV-B visitation is reported to the ACF each December.

## Generating the Comprehensive Visitation Report for records out of compliance with Title IV-B Visitation.

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**Comprehensive Visitation Report**

**Begin Date: \***   (mm/yyyy)

**End Date : \***   (mm/yyyy)


**Age: \***  ▼

**Report Type: \***  ▼

**Option 1**

**Agency: \***  ▼

**Population: \***  ▼

**Population Type: \* **  ▼

**Visited:**  ▼

**Unit:**  ▼

**Supervisor:**  ▼

**Worker:**  ▼

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

Generate Statewide Summary Report