

Recording an Activity Log on a Provider Record



Knowledge Base Article

Recording an Activity Log on a Provider Record

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Recording an Activity Log on a Provider Record

Overview

This article describes how to complete an activity log within a Provider Record. Activity Logs are used to document communications with members of the resource family, placed youth or collateral contacts. These contacts can be for the purposes of home study or kinship care assessment, ongoing licensing and monitoring or tracking how placements are faring in the home.

Important: An activity log can be saved in **Draft** status and the record can be edited until the activity log status is saved as **Completed**.

Navigating to the Activity Log Details Screen

1. From the Ohio SACWIS **Home** screen, click the **Provider Tab**.
2. Click the **Workload** tab and press '[select](#)' next to the desired Provider ID/Name.

	Home	Intake	Case	Provider	Financial	Administration	
Workload	Provider Search	Provider Match	Recruitment	Inquiry	Training	Contracts	Agency Certifications

KCCP Pre-Screening Tool

Workload

Provider Worker: Sort By:

Verity Angela (48 Providers)

	Provider ID	Provider Name	Provider Status	Provider Type	Type Status	Approval/Certification Period	Primary Address
select	1111	Test, Provider	Active	Foster Care	Certified	11/22/2022 - 11/21/2024	
select	2222	Test, Provider 2	Active	Adoptive Care Foster Care	Application Received Application Received		

Alternatively,

3. Click the **Provider Search** sub-tab.
4. Enter the appropriate search criteria.
5. Click the **Search** button. The results appear in the **Search Results** section of the screen.
6. Click the **Edit** link next to the appropriate provider record.

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Home	Intake	Case	Provider	Financial	Administration			
Workload	Provider Search	Provider Match	Recruitment	Inquiry	Training	Contracts	Agency Certifications	KCCP Pre-Screening Tool

Search For Provider Profile

Provider ID:

OR

Provider Name:

Member Last Name:

Member First Name:

Member Middle Name :

Provider Category:

Agency Type:

Agency:

Provider Type:

☒ Include "Closed" Provider Type Status

Provider Status:

[Address, Contact and Provider Reference Criteria](#) ▾

Name Match Precision
Returns results matching entered names including AKA names/nicknames

Fewer Results

+ AKA/Nicknames

More Results

Search

Clear Form

Search Results

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

	Provider Name / ID	Provider Status	Provider Category	Address
<div>view edit</div>	Test, Provider / 1111	ACTIVE	HOME	

[View Provider Type Information](#) ▾

The **Provider Overview** screen appears.

7. Click the **Activity Log** link in the **Navigation** menu on the left.

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The screenshot shows the 'Provider Overview' page. On the left sidebar, the 'Activity Log' link is highlighted with a red box. The main content area displays provider information for 'Test, Provider / 1111' with a 'TIER 3' status. It includes fields for 'PRIMARY ADDRESS' (123 Test Rd, Test Oh 12345) and 'PRIMARY CONTACT' (Cell:). Below this are sections for 'Provider Actions', 'Provider Information | Linked 1692 Providers', and 'Approval/Certification Spans'.

The **Activity Log Filter Criteria** screen appears displaying the **Activity Log** section below it.

1. Click the **Add Activity Log** button at the top of the **Activity Log** list or bottom of the screen.

The screenshot shows the 'Activity Log' screen. At the top, there's a header 'Activity Log' and a sub-header 'Result(s) 1 to 4 of 4 / Page 1 of 1'. Below this is a table with columns: Start Date/Activity State, Contact Type, Category, Sub-Category, Responsible Worker, and Created By. The table contains one entry with '08/24/2023' as the start date, 'Email' as the contact type, 'Adoptive Home Applicant' as the category, and 'Assessment Visit' as the sub-category. Below the table, there are buttons for 'Add Activity Log' (highlighted with a red box) and 'Generate Report'.

The **Activity Log Details** screen appears as shown below.

Completing the Activity Log

Activity Log Details Section

Choose the **Responsible Worker** from the drop-down list. This will populate from all the employees assigned to the **Provider** record.

1. Enter in the **Originator of Information**, if different from the **Responsible Worker**.
2. In the **Activity Start Date** field, verify that the date is correct. This field automatically populates with the current date but can be changed.
3. Enter an **Activity End Date**.
4. If needed, enter the appropriate time in the **Start Time** field.
 - Entering the time improves sorting capabilities and compliance monitoring.
 - If a start time is entered, an **End Time** must be entered to save the record.

Recording an Activity Log on a Provider Record

Activity Log Details

Created By: _____ Date & Time Entered: Sep 25, 2023 10:10:08 AM

Responsible Worker: _____ Originator of Information: _____

Activity Start Date: * 09/25/2023 Start Time: _____

Activity End Date: _____ End Time: _____

Contact Types Section

5. In the **Contact Types** section, select the most appropriate value(s) in the **Available Contact Types** field.
6. Click the **Add** button. The selection(s) move to the **Selected Contact Types** field.

Contact Types

Available Contact Types: _____ Add

Alternative Form of Contact

Announced Home Visit

Collateral

Court

Critical Safety Issue

Education

Email

Face-to-Face

Selected Contact Types: _____ Remove

Category Information Section

7. In the **Category Information** section, select a **Contact Duration** (not required, but should be entered if a Start and End Time were not entered).
8. In the **Category** field, select the appropriate value from the drop-down list. Depending on the value selected in the **Contact Type** field, different values display for this selection.
9. In the **Sub-Category** field, select the appropriate value from the drop-down list. Depending on the value selected in the **Category** field, different values display for this selection.
10. If 'Other' was selected in the **Sub-Category** field, enter in an **Other Sub-Category** value.
11. Select the checkbox for 'High Priority' or 'Restricted' if applicable.
 - Checking the High Priority box will send a notification email for all users assigned to the Provider Record when the Activity Log is saved or modified, which will note "A High Priority Activity Record has been completed. Provider Name (Last Name, First Name), Provider ID XXXXX."
 - Checking the Restricted box can only be done by a worker assigned to the **Provider Record**. When an Activity Log has been marked Restricted, only users assigned to the Provider record may view it.

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The screenshot shows the 'Category Information' section of a form. It includes a 'Contact Duration' dropdown menu, a 'Category: *' dropdown menu, a 'Sub-Category: *' dropdown menu, and an 'Other Sub-Category' text box. To the right, there are two checkboxes: 'High Priority' and 'Restricted'.

Location Information Section

12. In the **Location Information** section, select the **Location Type** where the activity took place. Enter an **Other Location** if the **Location Type** of **Other** was chosen. Enter any applicable information in the **Location Details** text box as needed.
13. The bottom right corner of the text box in **Location Details** may be clicked to expand the box into full screen mode, and Spell Check used as desired.

The screenshot shows the 'Location Information' section. It includes a 'Location Type' dropdown menu, an 'Other Location' text box, and a 'Location Details' text box. Below the 'Location Details' text box are 'Spell Check' and 'Clear' buttons, and a '200' character count. A small icon in the bottom right corner of the 'Location Details' text box indicates a full-screen expansion option.

Activity Association Section

14. In the **Activity Association** section, click the **Associate Members** link.

The screenshot shows the 'Activity Association' section. It includes a link for 'Associate Members', a 'Provider Household' section, a 'Children Placed' link, and a 'Living Arrangements' link. There is also a checkbox for 'Save Note to Child(ren) Record'.

The **Associate Members** screen appears.

15. In the **Associate Members** section, select the check box next to each person who was seen and/or communicated with during the activity.
16. When complete, click the **OK** button.

The screenshot shows the 'Associate Members' section. It includes a 'Members' list with a checkbox next to 'Test, Provider / 1111'. Below the list are 'OK' and 'Cancel' buttons.

As shown below, the **Activity Details** screen appears displaying the associated member's name(s) in the **Activity Association** section.

Recording an Activity Log on a Provider Record

Activity Association

Activity Applicable to Following Members [[Associate Members](#)]

Test, Provider / 1111

Activity Applicable to Following Children: ☐ Save Note to Child(ren) Record

Children Placed [[Associate Children Placed](#)]

Living Arrangements [[Associate Living Arrangements](#)]

17. If any children placed in the home or residing in the home via a Living Arrangement were involved in the activity, click the **Associate Children Placed** and/or the **Associate Living Arrangements** link.

Activity Applicable to Following Children: ☐ Save Note to Child(ren) Record

Children Placed [[Associate Children Placed](#)]

Living Arrangements [[Associate Living Arrangements](#)]

The **Associated Placed Children** or **Associate Living Arrangements** screen appears.

18. Select the box next to any child involved in the activity being recorded.

19. When complete, click the **OK** button.

Associate Living Arrangements

LivingArrangements, Test

OK Cancel

As shown below, the **Activity Details** screen appears, displaying the associated child(ren)'s name(s) in the **Activity Association** section.

Activity Association

Activity Applicable to Following Members [[Associate Members](#)]

Veatch, Alana - 09/22/1974

Activity Applicable to Following Children: ☒ Save Note to Child(ren) Record

Children Placed [[Associate Children Placed](#)]

Living Arrangements [[Associate Living Arrangements](#)]

LivingArrangements, Test - 9/25/2023

20. To have this activity log saved on the child's case record as well as on the provider record, click the **Save Note to Child(ren) Record** check box.

Important: Please ensure no other placed youth's identifying information is contained in the activity log when using **Save Note to Child(ren) Record**.

Note: Ohio SACWIS will send a copy of the activity log to each checked youth's case. In the case of siblings placed together, Ohio SACWIS will create a copy for each child, so there will be multiples of the same contact sent to the case.

21. In the **Narrative** field, enter details from the activity being recorded.

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22. When all of the activity log fields on the have been completed, change the **Activity State** field status to **Completed**.

Important: As stated previously, an activity log can be saved in **Draft** status and the record can be edited until the activity log status is saved as **Completed**.

23. When complete, users may:

- Click the **Save** button at the bottom of the screen to commit the activity log to the data base and return to the **Activity Log** List page.
- Click **Apply** to save the log and remain on the same activity log record.
- Click **Cancel** to save any unapplied changes and return to the List page.
- Click **Delete** to delete the entire activity log record.
- Click **Previous** to view the previous activity log record.
- Click **Next** to move to the next activity log record in the list.

The screenshot shows a web form for recording an activity log. At the top, there is a 'Narrative *' field with a red border, containing a large text area and a '(expand full screen)' link. Below this is a 'Spell Check' button, a 'Clear' button, and a character count '10000'. The 'Activity State: *' section has a dropdown menu with 'Draft' selected, and a red box highlights the 'Draft' and 'Completed' options. At the bottom, there are four buttons: 'Apply', 'Save' (highlighted with a red box), 'Cancel', and 'Delete'.

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