# Generating the Comprehensive Visitation Report



# Knowledge Base Article

# Generating the Comprehensive Visitation Report

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# Generating the Comprehensive Visitation Report

## Overview

The **Comprehensive Visitation Report** has been designed to deliver comprehensive child and adult visitation data for the State of Ohio in reporting formats that meet the needs of a variety of SACWIS end-users.

The report can be generated in the following report formats:

- **Agency Summary and Detail**
- **Statewide Summary**
- **Agency-wide Summary**

The **Statewide Summary** and **Agency-wide Summary** include visitation data for **BOTH** children and adults regardless of the child's **Custody Status**. The **Agency Summary and Detail Report** can be filtered by the **Population** (Children, Adults, or Both) and the **Population Type** (Custody, Non-Custody, or Both) in order to meet the reporting needs of the end-user.

**Security Requirements:** Any user with the security privileges to access the Administration Reports tab in SACWIS will be able to generate this report.

**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, Adoption, and Assessment/Investigations Cases Open 65 Days & Over** (A/I Cases Open 65 Days & Over):
  - When any child in the case is in agency custody, then any *other* child(ren) not in agency custody who is an Active Case Member (Case Participant) will pull into the report **if they are listed as a Case Plan Participant**.
  - 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.
- 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).**

**The SACWIS Visitation data presented in the Comprehensive Visitation Report is refreshed via a nightly batch job, meaning the report does not include visitation data from today. Visitation data entered in the SACWIS application will be available the following day. Additionally, the report header contains the Visitation Data Current Through date which displays the date when the visitation data was last refreshed which should always read the previous day's date. If data is entered into the**

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**application and does not appear on the report within one day, please contact the SACWIS Help Desk and provide specific details regarding the data that should appear on the report.**

## Navigating to the Report

1. From the SACWIS **Home** screen, click the **Administration** tab.



2. Click the **Reports** tab.



The **Reports** tab screen appears, displaying an alphabetical list of report names (as hyperlinks) in the **Reports** grid.
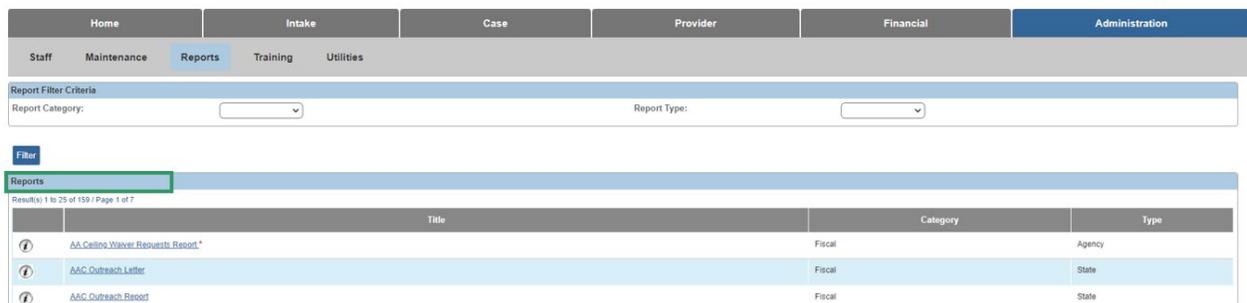


3. Look through the pages until you locate the **Comprehensive Visitation Report** link.
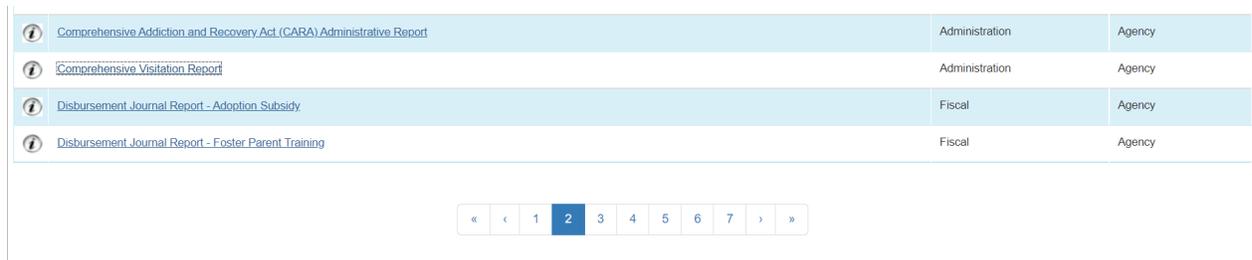


**Note: Administration** can be selected from the **Report Category** drop-down list and the **Filter** used to get a shorter list of results.



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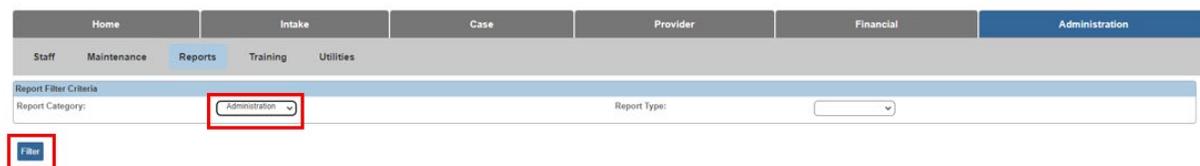
# Generating the Comprehensive Visitation Report

4. Once the Comprehensive Visitation Report link is located, click the link.

| | | | |
|---|---|---|---|
| ⓘ | Comprehensive Visitation Report | Administration | Agency |
| ⓘ | Display Ticklers | Administration | Unit |
| ⓘ | Family Assessment Risk Contributor Report | Administration | Agency |
| ⓘ | Federally Recognized Tribes Report | Administration | Agency |
| ⓘ | ICPC_ICAMA Statistical Report | Administration | Agency |

1 2 3 › »

The **Report Details** screen appears.

5. To view a saved report, click the **Report ID** hyperlink in the **Report History** section.
6. To create a new report, click, **Generate Report**.

**Note**: **Excel** is pre-selected and is the recommended format for this report.
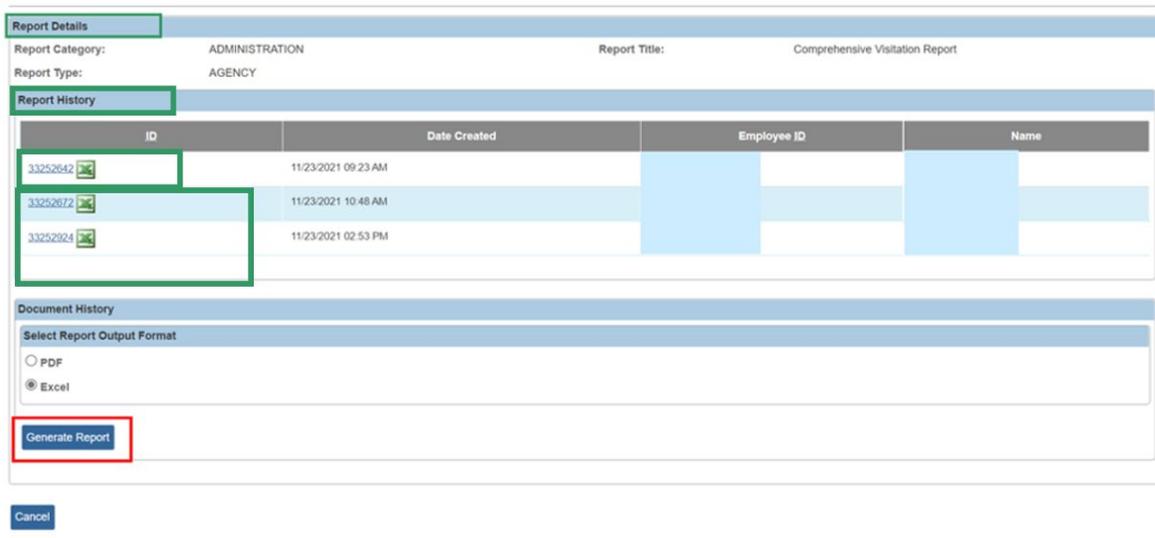
**Report Details**

| Report Category: | ADMINISTRATION | | Report Title: | Comprehensive Visitation Report |
|---|---|---|---|---|
| Report Type: | AGENCY | | | |

**Report History**

| ID | Date Created | Employee ID | Name |
|---|---|---|---|
| 33252642 📗 | 11/23/2021 09:23 AM | | |
| 33252672 📗 | 11/23/2021 10:48 AM | | |
| 33252924 📗 | 11/23/2021 02:53 PM | | |

**Document History**

**Select Report Output Format**

○ PDF
◉ Excel

Generate Report

Cancel

The **Comprehensive Visitation Report** screen appears.

## Selecting the Report Parameters

There are two **Options** for generating **Child and Adult Visitation data**. Both options require the selection of a **Begin Date, End Date, Age, and Report Type** to define the parameter period and type of visitation data returned.

**Important:** The visitation data table, which populates the report, will be loaded with visitation data dating back to **January 2010**. This will be a ONE time data load. Visitation data prior to that date may not be accurately reflected in this report. Visitation data beyond the prior two **Calendar** years will also be frozen, i.e., visitation data dating back to 2012 is modifiable through December 31, 2014. On January 1, 2015 data for 2012 becomes frozen.

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## OPTION 1

The **Agency Summary and Detail Report** is intended to provide a tool for administrators, supervisors, and workers that will identify **Required Child and/or Adult Visits** during the requested parameter period.

This report provides a **Visitation Summary** for the selected parameter period, in addition to a **Detail List** of distinct person/required-visit combinations.



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| | |
|---|---|
| Visited: | ⌄ |
| Unit: | ⌄ |
| Supervisor: | ⌄ |
| Worker: | ⌄ |

## OPTION 2

The **Statewide Summary Report** provides a compilation of the visitation data for the State of Ohio during the requested parameter period.

The **Agency-Wide Summary Report** provides a compilation of the visitation data for the selected Agency or Agencies during the requested parameter period.

**Note:** County users are only able to generate the **Agency-Wide Summary Report** for their **County Agency**. State users are able to generate the report for any combination of **Public Agencies** throughout the state.

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

☐ Generate Statewide Summary Report

OR

**Select Agencies:**

| Available Agencies: | | | | Selected Agencies: | | |
|---|---|---|---|---|---|---|
| 🔍 | Add All | Add | | Remove | Remove All | 🔍 |
| Adams County Children Services Board | | | | | | |
| Allen County Children Services | | | | | | |
| Allen County Juvenile Court | | | | | | |
| Ashland County Department of Job and Family Services | | | | | | |
| Ashtabula County Children Services Board | | | | | | |
| Ashtabula County Juvenile Court | | | | | | |
| Athens County Children Services Board | | | | | | |
| Auglaize County Department of Job and Family Services | | | | | | |

## Generating the Agency Summary and Detail Report – Option 1

1. Enter the **Begin Date**.  (Required)

2. Enter the **End Date**.  (Required)

   **Note:** The **Begin** and **End** dates are entered as Months and Years because the visitation data will only include persons that meet the Data Population Requirements for the Entire Month, with the exception of Partial Month data.

3. Make a selection from the **Age** drop-down menu. (Required)

4. Enter the **Report Type**. (Required)

   **Note:** Report Type speaks to the report records the user would like to review within the report. The options for Report Type include the option to **Include All Records**, **Include Only AI/AR Cases Open 65 Days & Over**, **Exclude AI/AR Cases Open 65 Days & Over**, or **Include Only Prevention Services**. When selecting Include All

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Records or Include Only AI/AR Records Open 65 Days & Over, the report will return Case Categories of Ongoing, Ongoing AR, Adoption, and A/I Cases where the case has been open for 65 Days and Over, as these children require monthly visitation. A/I cases open 65 days or more not included in the report are, **Family In Need of Services** reports where the Intake Type is **Emancipated Youth**, **Home Evaluation/Visitation Assessment**, **ICAMA**, **ICPC**, **Post Finalized Adoption Services**, and **Required Non-Lead Interview**.

**Comprehensive Visitation Report**

| | |
|---|---|
| Begin Date: * | ▦ (mm/yyyy) |
| End Date : * | ▦ (mm/yyyy) |
| Age: * | ⌄ |
| Report Type: * | ⌄ |

**Partial Month Data** will only be available for the **Current Month** to help track which persons require a visit. When the selected **End Date** is the current month, the report will include children and adults who meet the population requirements for the partial month. However, for the rest of the Parameter Period, only persons who meet the **Data Population Requirements** for the **Entire Month** will be included in the report.

5. Select the **Agency**. (Required)

**Note:** The **Agency** drop-down menu defaults to the agency of the logged in user. **County Agency** users will only be able to generate the report for public agencies where they are set up as employees (for example, users set up under children services and juvenile court profiles will be able to generate the report for either agency). **State** users will be able to generate the report for any public agency.

6.

| | |
|---|---|
| Agency: * | County Children Services Board ⌄ |

7. Select the **Population** (Children, Adults, or Both) to include in the report. (Required)

Option 1

| | |
|---|---|
| Agency: * | Children Services Board ⌄ |
| Population: * | ⌄ |
| Population Type: * ⓘ | ⌄ |

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**Depending upon the parameter selection for the report, some or all of the above listed conditions may apply.**

8. Select the **Population Type** (Custody, Non-Custody, or Both) to include in the report. (Required)

**Important:** When the **Population** includes Adults, the **Population Type** will include Adults *associated to* Children included in the selected **Population Type**.

**Example:** If the report is generated where the **Population = Adults** and the **Population Type = Custody**, the report will provide visitation data for Adults *associated to* Children in Custody.

The following message, describing **Population Type**, displays when the user hovers over the information icon in the application:



**Important:** 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*.

**Note:** It is determined that an Adult is *associated to* a Child when the adult is listed as an **Adult Participant** on a **Case Plan** where a **Child Participant** on that same case plan is included in the identified **Population Type**. As shown below, the Adults listed on the **Identifying Information** page of a case plan are considered to be associated to the Child(ren) listed on the same plan.

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9.  Select the value for **Visited** from the drop-down list (optional).
10. Select the **Unit** from the drop-down list, if needed (optional).
11. Select the **Supervisor** from the drop-down list (optional).
12. Select the **Worker** from the drop-down list (optional).

Visited:

Unit:

Supervisor:

Worker:

13. Click **Generate Report** at the bottom of the screen.

Generate Report   Cancel

The following screen appears, stating, **Your report is being created**.

Ohio SACWIS        / Log off
County Department of Job and Family Services
UAT1 / 4.17.0 / Last Login:

🏠 Home ▾   🕐 Recent ▾   🔍 Search ▾   ❓ Help ▾

Your report is being created

Please wait ...

Report Requested: 12:53:31 PM
Last Checked: 12:53:46 PM

Cancel
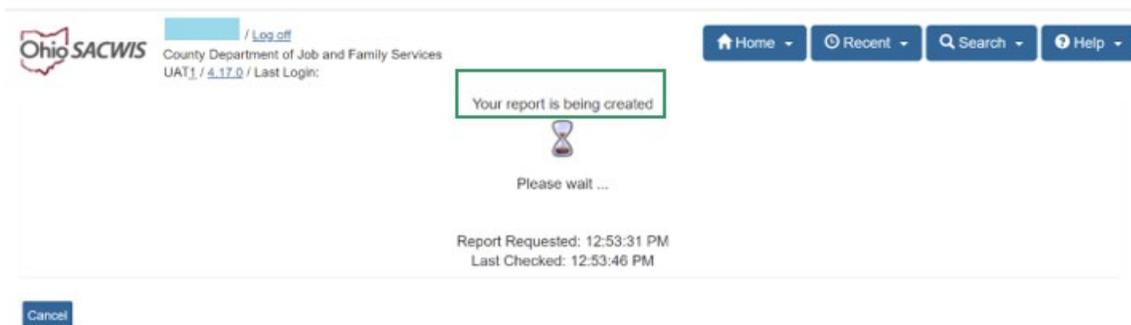
Once the report is created, the screen below appears.

**Note: The view of the screen below will depend on the browser you are using. The top screen shot appears if you are using Google Chrome. The bottom screen displays when Microsoft Edge is used.**

14. Click the file download icon that will display at either the top or the bottom of the browser.

15. Click, **Save**, to save the generated report to the **Report History**.

16. Click, **Review Parameters** to return to the **Report Parameters** screen.

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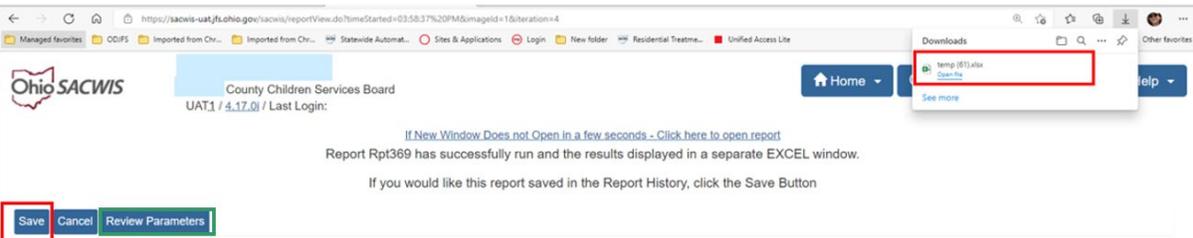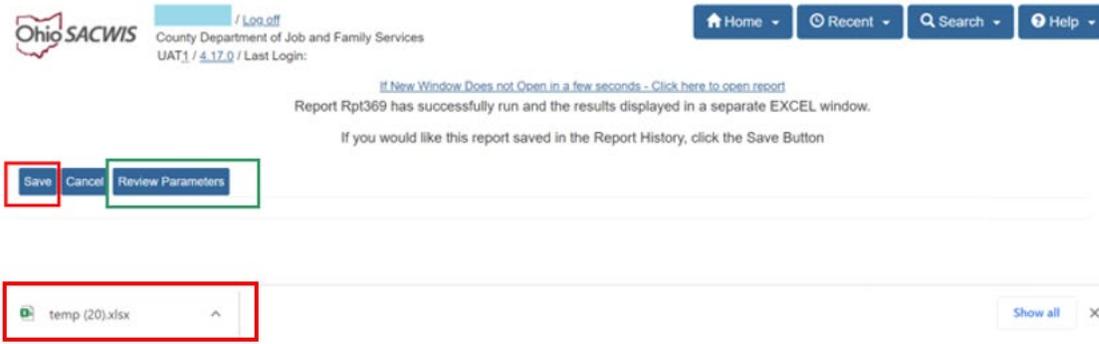


The **Agency Summary and Detail Report** appears in Excel format (recommended).

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| Monthly Placement Setting Visit Completed (Yes/No) | Monthly In Home Visit Completed (Yes/No) | Date of Most Recent Visit Completed During Month | Date of Most Recent Visit Completed | Number of Completed Visits in Month | Number of Attempted Visits in Month | Agency Legal Status (As of Last Day of Month) | Placement Type (As of Last Day of Month) |
|---|---|---|---|---|---|---|---|
| Yes | No | 10/12/2021 | 10/12/2021 | 3 | 0 | | |
| Yes | No | 10/12/2021 | 10/12/2021 | 2 | 0 | | |
| No | No | | 09/02/2021 | 0 | 0 | Court Ordered Prot Sup | |
| No | No | | 09/02/2021 | 0 | 0 | Court Ordered Prot Sup | |
| No | No | | 09/20/2021 | 0 | 0 | Court Ordered Prot Sup | |
| No | No | | 09/02/2021 | 0 | 0 | Court Ordered Prot Sup | |
| No | No | | 09/02/2021 | 0 | 0 | Court Ordered Prot Sup | |
| No | No | | 09/02/2021 | 0 | 0 | Court Ordered Prot Sup | |
| No | No | | 09/20/2021 | 0 | 0 | | |
| No | No | 10/26/2021 | 10/26/2021 | 1 | 0 | Temporary Custody/Placement and Care | Certified Foster Home |
| No | No | | 09/27/2021 | 0 | 0 | Temporary Custody/Placement and Care | Certified Foster Home |
| No | No | | | 0 | 0 | Temporary Court Order | |
| No | No | | | 0 | 0 | Temporary Court Order | |
| No | No | | | 0 | 0 | | |
| No | No | | | 0 | 0 | Temporary Court Order | |
| No | No | | | 0 | 0 | Temporary Court Order | |
| No | No | | | 0 | 0 | | |
| Yes | No | 10/26/2021 | 10/26/2021 | 2 | 0 | Temporary Custody 1st Extension | Certified Group Home |
| Yes | No | 10/21/2021 | 10/21/2021 | 1 | 0 | Temporary Custody/Placement and Care | Children's Residential Facility |
| No | Yes | 10/18/2021 | 10/18/2021 | 2 | 0 | | Children's Residential Facility |
| No | No | | 09/22/2021 | 0 | 0 | Temporary Court Order | Children's Residential Facility |
| No | No | | 09/22/2021 | 0 | 1 | Temporary Court Order | Children's Residential Facility |
| No | Yes | 10/21/2021 | 10/21/2021 | 3 | 0 | | |
| No | No | | 05/04/2021 | 0 | 0 | Court Ordered Prot Sup | |
| No | No | | 09/03/2021 | 0 | 0 | Court Ordered Prot Sup | |
| No | No | | 09/03/2021 | 0 | 0 | Court Ordered Prot Sup | |
| No | No | | | 0 | 0 | | |

| Placement Begin Date | Case Plan Service Exists (Yes/No) | Person Participated in Case Plan (Yes/No) | Safety Plan Exists as of End of the Month (Yes/No) | Permanency Goal | Alternative Response Family Service Plan (Yes/No) | Responsible Worker | Supervisor |
|---|---|---|---|---|---|---|---|
| | Yes | No | No | Permanent Placement with Relative | No | | |
| | Yes | No | No | Permanent Placement with Relative | No | | |
| | No | No | No | Maintain in own home; prevent removal | No | | |
| | No | No | No | Maintain in own home; prevent removal | No | | |
| | No | Yes | No | Maintain in own home; prevent removal | No | | |
| | No | No | No | Maintain in own home; prevent removal | No | | |
| | No | No | No | Maintain in own home; prevent removal | No | | |
| | No | Yes | No | Maintain in own home; prevent removal | No | | |
| | No | No | No | | No | | |
| 05/19/2021 | Yes | No | No | Return the child(ren) to parent/guardian/or custodian (Reunification) | No | | |
| 05/19/2021 | Yes | No | No | Return the child(ren) to parent/guardian/or custodian (Reunification) | No | | |
| | No | No | No | | No | | |
| | No | No | No | | No | | |
| | No | No | No | | No | | |
| | No | No | No | | No | | |
| | No | No | No | | No | | |
| | No | Yes | No | Maintain in own home; prevent removal | No | | |
| 10/15/2018 | Yes | No | No | Return the child(ren) to parent/guardian/or custodian (Reunification) | No | | |
| 10/15/2020 | Yes | No | No | | No | | |
| | No | No | No | Maintain in own home; prevent removal | No | | |
| 09/12/2021 | Yes | No | No | Return the child(ren) to parent/guardian/or custodian (Reunification) | No | | |
| 09/12/2021 | Yes | Yes | No | Return the child(ren) to parent/guardian/or custodian (Reunification) | No | | |
| | No | No | No | Maintain in own home; prevent removal | No | | |
| | No | No | No | Maintain in own home; prevent removal | No | | |
| | No | No | No | Maintain in own home; prevent removal | No | | |
| | No | No | No | Maintain in own home; prevent removal | No | | |
| | No | No | No | Maintain in own home; prevent removal | No | | |

# Understanding the Agency Summary and Detail Report

## Section I. Agency Visitation Totals

This section provides a **Visitation Data Summary** for the selected agency which is broken down by **Month** and **Year** as selected on the parameter page. The following **Subsections** may be included in the **Agency Visitation Totals** depending on the parameters selected for the report:

- Total Child Visits Needed

- Total Child Visits (i.e., completed visits)

- Percent of Visits Met for Children

- Total Adult Visits Needed

- Total Adult Visits (i.e., completed visits)

- Percent of Visits Met for Adults

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## Section II. Child Visitation Summary

This section provides a **Child Visitation Data Summary** for the selected agency which is broken down by **Month** and **Year** as selected on the parameter page. The following **Subsections** may be included in the **Child Visitation Summary** depending on the parameters selected for the report:

- Total Visits Needed for Children in Custody

- Total Visits for Children in Custody (i.e., completed visits)

- Percent of Visits Met for Children in Custody

- Total Visits Needed for Children Not in Custody

- Total Visits for Children Not in Custody (i.e., completed visits)

- Percent of Visits Met for Children Not in Custody

## Section III. Adult Visitation Summary

This section provides an **Adult Visitation Data Summary** for the selected agency which is broken down by **Month** and **Year** as selected on the parameter page. The following **Subsections** may be included in the **Adult Visitation Summary** depending on the parameters selected for the report:

Total Visits Needed for Adults Associated to Children in Custody

- Total Visits for Adults Associated to Children in Custody (i.e., completed visits)

- Percentage of Visits Met for Adults Associated to Children in Custody

- Total Visits Needed for Adults Associated to Children Not in Custody

- Total Visits for Adults Associated to Children Not in Custody (i.e., completed visits)

- Percent of Visits Met for Adults Associated to Children Not in Custody

**Note:** While the **Child Visit Populations** are mutually exclusive, the **Adult Visit Populations** are not, meaning that if a parent is involved with a PCSA with respect to two children, one of which is in custody and the other is not, that parent would be included in **BOTH** the **Custody** and the **Non-Custody** population. However, Sections I and IV will only count distinct Person IDs so that an adult visit is never counted more than once in the overall total.

## Section IV. Combined Visitation

This section provides Total Combined Visitation data for Adults and Children for the selected agency, which is broken down by Month and Year, as selected on the parameter page. Additionally, the final row of Section IV, labeled **Totals**, gives a complete count of Combined Visitation for the entire parameter period selected by the user. The calculation used to obtain this value is **Total Child Visits + Total Adult Visits = Total Visits** and **All Adult Visits Needed + All Child Visits Needed = Total Visits Needed**. The percentage is obtained by taking **Total Visits/Total Visits Needed = Percent of Visits Met for All Adults and All Children Combined**. The following data elements display in this section:

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- Total Visits Needed

- Total Visits

- Percent of Visits Met for All Adults and All Children Combined

## Section V. Visitation Details

The **Visitation Details** represents the largest section of the **Agency Summary and Detail Report**. This section provides **Detailed Visitation Data** for the selected agency for the selected parameter period. The following data elements are included in the report:

- Case ID

- Case Name

- Case Category

- AI/AR Case Open 65 Days & Over

- Person ID

- Last Name

- First Name

- DOB

- Visit Month

- Person Visited (Yes or No)

- Population (Child/Adult)

- Population Type (Custody/Non-Custody)

- Monthly Placement Setting Visit Completed (Yes/No)

- Monthly In-Home Visit Completed (Yes/No)

- Location of Completed Monthly Visit

- Date of Most Recent Visit Completed During Month

- Date of Most Recent Visit Completed

- Number of Completed Visits in Month

- Number of Attempted Visits in Month **(Note:** The report will count **three (3) attempted visits** as credit for a visit in the monthly visit **totals and percentage calculations)**.

- Agency Legal Status (As of Last Day of Month)

- Placement Type (As of Last Day of Month)

- Placement Begin Date

- Case Plan Service Exists (Yes/No)

- Person Participated in Case Plan (Yes/No)

- Safety Plan Exists as of End of the Month (Yes/No)

- Permanency Goal

- Alternative Response Family Service Plan (Yes/No)

- Responsible Worker

- Supervisor

**Note:** Sections I, II, and III regarding visit counts are obtained by counting the **distinct** Person IDs for the applicable category. For example, Total Child Visits Needed is obtained by filtering on the Population of "Child" and then counting the distinct Person IDs.

**Important:** It is recommended that you select **Excel** as the report output format for the Comprehensive Visitation Report. Excel allows you to apply **Filter** to the data elements included in the Visitation Details, thereby giving users the ability to organize the report data in a manner that best suits individualized agency and/or user needs.

## Applying Excel Filters to the Visitation Details

1. Select the **Row** that contains the data element, **Column Headers**.

   **Note:** This step is dependent on your computer settings.

**Hint:** Place the cursor on the **Row Number** to highlight the row. If the column headers span multiple rows, it is necessary to highlight only the first row of the header.



2. From the **Home** tab, once the row is highlighted, click **Sort & Filter** (the Sort & Filter menu will expand).

   OR,

   From the **Home** tab, once the row is highlighted, click **Editing**, then, Sort & Filter.

3. Select the **Filter** option.

Drop-down **Filter Arrows** will appear on each cell in the highlighted **Row** as shown below. Settings may be different for Google Chrome and Edge.

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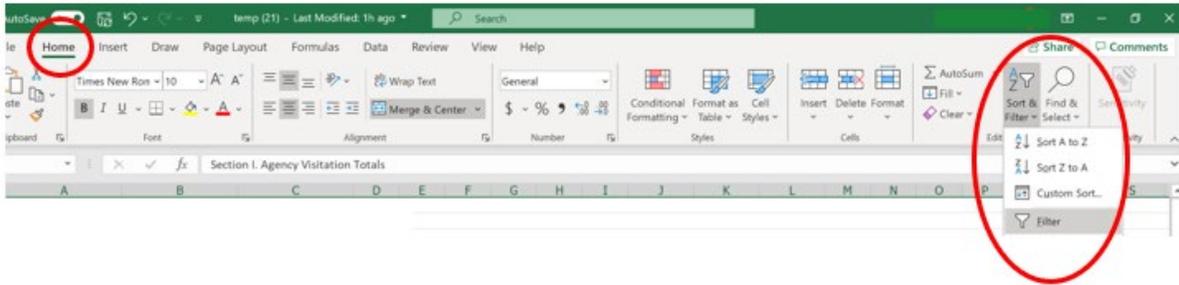
4. Click **Filter Arrow** to filter the relevant **Column**.

A **Sort & Filter** popup window appears displaying a list of the entries in the selected column.

5. Check the boxes next to the **Data Elements** to be included in the filter.
6. Click, **OK** to apply the filter.
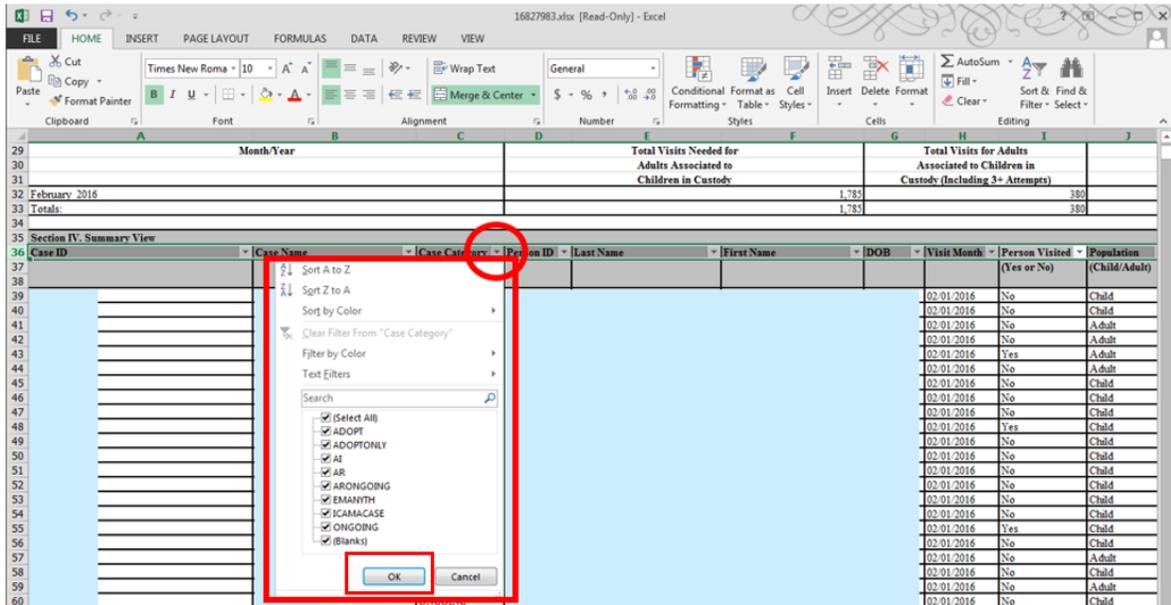


## Generating the Agency or Statewide Summary Report – Option 2

1. Navigate to the **Comprehensive Visitation Report** parameters screen using the steps previously discussed.
2. Enter the **Begin Date**. (Required)
3. Enter the **End Date**. (Required)
4. Make a selection from the **Age** drop-down menu. (Required)
5. Enter the **Report Type.** (Required)

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6. Check the **Generate Statewide Summary Report** checkbox below **Option 2** on the **Comprehensive Visitation Report** parameter screen **OR** use the **Available Agencies** list in the **Select Agencies** grid to choose the agency or agencies for which to run the report.

7. Click the **Generate Report** button at the bottom of the screen.



**Important: If Option 2 is selected, then all selections from Option 1 will be negated.**

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The following screen appears, stating, **Your report is being created**.



Once the report is created, the following screen appears:

> **Note: The view of the screen below will depend on the browser you are using. The top screen shot appears if you are using Google Chrome. The bottom screen displays when Microsoft Edge is used.**

8. Click the file download icon that displays at either the top or the bottom of your browser.

9. Click the **Save** button in order to save the generated report to the **Report History**.

10. Click the **Review Parameters** button if you wish to return to the **Report Parameters** screen.





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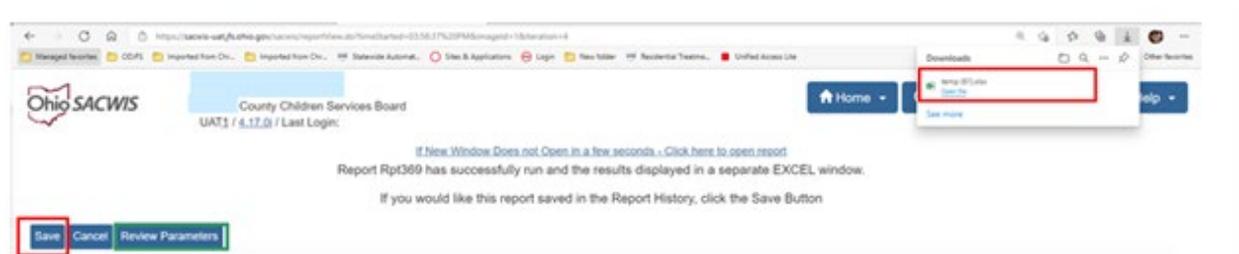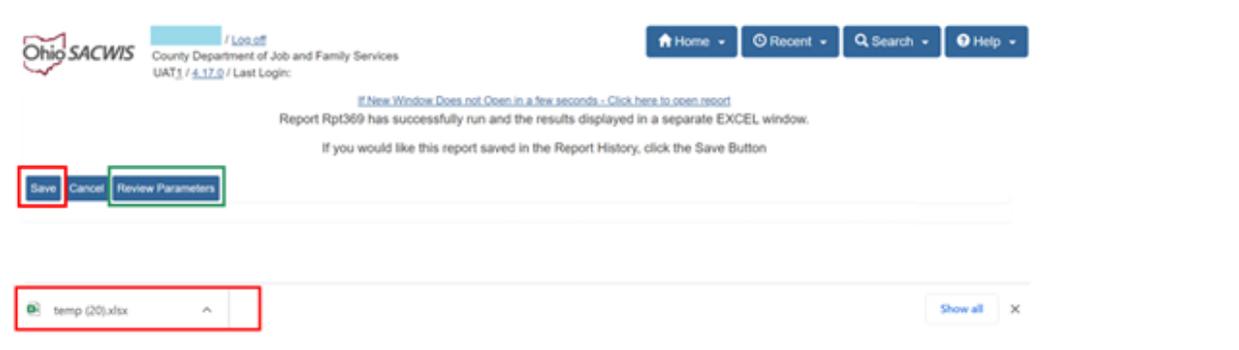
# Generating the Comprehensive Visitation Report

The **Agency** or **Statewide Summary Report** appears in Excel format (suggested).



| | Section I. Agency Visitation Totals | | | | | |
|---|---|---|---|---|---|---|
| | **Children** | | | **Adults** | | |
| **Month/Year** | **Total Child Visits Needed** | **Total Child Visits (Including 3+ Attempts)** | **Percent of Visits Met for Children** | **Total Adult Visits Needed** | **Total Adult Visits (Including 3+ Attempts)** | **Percent of Visits Met for Adults** |
| February 2016 | 32,247 | 26,630 | 82.58% | 23,078 | 14,621 | 63.35% |
| Totals: | 32,247 | 26,630 | 82.58% | 23,078 | 14,621 | 63.35% |

| | Section II. Child Visitation Summary | | | | | |
|---|---|---|---|---|---|---|
| **Month/Year** | **Total Visits Needed for Children in Custody** | **Total Visits for Children in Custody (Including 3+ Attempts)** | **Percent of Visits Met for Children in Custody** | **Total Visits Needed for Children Not in Custody** | **Total Visits for Children Not in Custody (Including 3+ Attempts)** | **Percent of Visits Met for Children Not in Custody** |
| February 2016 | 13,008 | 11,713 | 90.04% | 19,239 | 14,917 | 77.54% |
| Totals: | 13,008 | 11,713 | 90.04% | 19,239 | 14,917 | 77.54% |

| | Section III. Adult Visitation Summary | | | | | |
|---|---|---|---|---|---|---|
| **Month/Year** | **Total Visits Needed for Adults Associated to Children in Custody** | **Total Visits for Adults Associated to Children in Custody (Including 3+ Attempts)** | **Percentage of Visits Met for Adults Associated to Children in Custody** | **Total Visits Needed for Adults Associated to Children Not in Custody** | **Total Visits for Adults Associated to Children Not In Custody (Including 3+ Attempts)** | **Percent of Visits Met for Adults Associated to Children Not in Custody** |
| February 2016 | 10,469 | 6,049 | 57.78% | 14,585 | 9,764 | 66.95% |
| Totals: | 10,469 | 6,049 | 57.78% | 14,585 | 9,764 | 66.95% |

Statewide_1

# Understanding the Agency and Statewide Summary Report

The **Agency** and **Statewide Summary Report** provides an **Agency** or **Statewide Visitation Data Summary** which is broken down by **Month** and **Year** as selected on the parameter page.

**Note:** Regarding the Agency Summary Report option, county users will only be able to generate the report for their own agency. State users will be able to select multiple agencies.

The following **Subsections** are included in the report:

## Section I. Agency/Statewide Visitation Totals

In addition to providing the **Totals** for the selected period, the totals are broken down by **Month** and **Year** as selected on the parameter page. This section includes the **Agency/Statewide** totals and includes the following data points:

- Total Child Visits Needed

- Total Child Visits (i.e. completed visits)

- Percent of Visits Met for Children

- Total Adult Visits Needed

- Total Adult Visits (i.e. completed visits)

- Percent of Visits Met for Adults

**Note:** While the **Child Visit Populations** are mutually exclusive, the **Adult Visit Populations** are not. For example, if a parent is involved with a PCSA with respect to two children, of which one is in custody and the other is not, that parent would be included in **BOTH** the **Custody** and the **Non-Custody** population.

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## Section II. Child Visitation Summary

In addition to providing the **Totals** for the selected period, the totals are broken down by **Month** and **Year** as selected on the parameter page. This section includes the **Child Visitation** totals and includes the following data points:

- Total Visits Needed for Children in Custody
- Total Visits for Children in Custody (i.e. completed visits)
- Percent of Visits Met for Children in Custody
- Total Visits Needed for Children Not in Custody
- Total Visits for Children Not in Custody (i.e. completed visits)
- Percent of Visits Met for Children Not in Custody

## Section III. Adult Visitation Summary

In addition to providing the **Totals** for the selected period, the totals are broken down by **Month** and **Year** as selected on the parameter page. This section includes the **Adult Visitation** totals and includes the following data points:

- Total Visits Needed for Adults Associated to Children in Custody

- Total Visits for Adults Associated to Children in Custody (i.e. completed visits)

- Percent of Visits Met for Adults Associated to Children in Custody

- Total Visits Needed for Adults Associated to Children Not in Custody

- Total Visits for Adults Associated to Children Not in Custody (i.e. completed visits)

- Percent of Visits Met for Adults Associated to Children Not in Custody

## Recording an Activity Log for a Child or an Adult 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:

- The activity log **Status** must be **Completed**.

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

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

- If the **Contact Type(s)** on the Activity Log includes only Contact Types listed below, this is NOT considered a visit:

    o Phone call to

    o Phone call from

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- o Letter to
- o Letter from
- o Voicemail
- o Message
- o Supervisor Staffing
- o Email
- o Fax
- o Social Media
- o Text Message
- o Virtual Visit/Video

- 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**).

**Important: Please be aware that users should only select an Activity Log Contact Status of Completed when Face-to-Face contact occurred with that participant. Indicating a Contact Status of Completed when no Face-to-Face contact occurred will likely cause the visitation report to falsely indicate that the participant was visited.**

**Note:** In order for a visit to count as a **Monthly Placement Setting Visit**, the **Location Type** of **Placement Setting** must be selected on the activity log.

If you need additional information or assistance, please contact the SACWIS Help Desk at: 614-466-0978, select #3, then select #5.