

Knowledge Base Article

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Recording an Activity Log for a Child or an Adult Visit



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 <u>if they are listed as a Case Plan Participant</u>.
 - 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



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.

Ho	ome	Intake	Case	Provider	Financial	Administration
Alerts	Action Items	Approvals	Assignments			

2. Click the Reports tab.

н	ome	Intake		Case	Provider	Financial	Administration
Staff	Maintenance	Reports	Training	Utilities			

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

	Home	Intak	8	Case	Provider	Financial	Administration
Staff	Maintenance Repo	rts Training	Utilities				
Report Filter	Criteria						
Report Cate	gory:	~			Report Type:	~	
Filter Reports	5 of 150 / Days 1 of 7						
				Title		Category	Туре
۲	AA Celling Waiver Requests Report*					Fiscal	Agency
1	AAC Outreach Letter					Fiscal	State
Ð	AAC Outreach Report					Fiscal	State

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

ĩ	Comprehensive Addiction and Recovery Act (CARA) Administrative Report	Administration	Agency
Ì	Comprehensive Visitation Report	Administration	Agency
Ì	Disbursement Journal Report - Adoption Subsidy	Fiscal	Agency
Ì	Disbursement Journal Report - Foster Parent Training	Fiscal	Agency

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

Home	Intake	Case	Provider	Financial	Administration
Staff Maintenance Repo	orts Training Utilities				
Report Filter Criteria					
Report Category:	Administration V		Report Type:	~	
Filter					



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

۲	Comprehensive Visitation Report	Administration	Agency
۲	Display Ticklers	Administration	Unit
۲	Eamily Assessment Risk Contributor Report	Administration	Agency
۲	Eederally. Recognized Tribes. Report	Administration	Agency
۲	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 Vis	itation Report
Report Type:	AGENCY			
Report History				
JD		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 For	mat			
OPDF				
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.



A CONTRACTOR OF A CONTRACTOR OFFA CONTRACTOR O	Report						
Begin Date: *		mm/yyyy)					
End Date : *		mi (mm/yyyy)					
Age: "							
Report Type: *							
Option 1							
Agency: *	Ohio De	partment of Job and Family Services	•				
Population: *			•				
Population Type: *			•				
Visited:			•				
Unit:			•				
Supervisor:			•				
Worker:			•				
Option 2 - All selections fro	om Option 1 will be negate	d.					
Option 2 - All selections fro	om Option 1 will be negate mary Report	d.					
Option 2 - All selections fro	om Option 1 will be negate mary Report	d.					
Option 2 - All selections fro Generate Statewide Summ OR	m Option 1 will be negate	d.					
Option 2 - All selections fro Generate Statewide Sum OR	m Option 1 will be negate	d.					
Option 2 - All selections fro Generate Statewide Sum: OR Select Agencies:	m Option 1 will be negate mary Report	d.		Colored Association			
Option 2 - All selections fro Generate Statewide Sum OR Select Agencies: Avail	m Option 1 will be negate mary Report lable Agencies:	d.		Selected Agencies:			
Option 2 - All selections fro Generate Statewide Sum OR Select Agencies:	m Option 1 will be negate mary Report lable Agencies: Q	d. Add All	Add	Selected Agencies:	Remove All	٩	
Option 2 - All selections fro Generate Statewide Sum OR Select Agencies: Avail Ata	m Option 1 will be negate mary Report lable Agencies: Q ums County Children Serv	d. <u>Add.All</u> vices Board	Add	Selected Agencies:	Remove All	٩	
Option 2 - All selections fro Generate Statewide Sum OR Select Agencies: Ada Alle Alle	m Option 1 will be negate mary Report lable Agencies: Q ms County Children Serv n County Children Serv n County Children Servi	Add All Add All vices Board ces	Add	Selected Agencies:	Remove All	٩	
Option 2 - All selections fro Generate Statewide Sum OR Select Agencies: Avail Ada Allee Allee	m Option 1 will be negate mary Report lable Agencies: Q ms County Children Servic n County Children Servic n County Juvenile Court Jand Courth Desatement	Add All vices Board ces	Add	Selected Agencies:	Remove All	Q	
Option 2 - All selections fro Generate Statewide Sum OR Select Agencies: Avail Ada Aller Aller Action	m Option 1 will be negate mary Report lable Agencies: Q ims County Children Servic n County Children Servic n County Unidren Servic n County Juvenile Court land County Department	Add.All vices Board ces t of Job and Family Services services Board	Add a	Selected Agencies:	Remové Al	٩	
Option 2 - All selections fro Generate Statewide Sum OR Select Agencies: Avail Ada Alle Alle Ash Ash	m Option 1 will be negate mary Report lable Agencies: Q ms County Children Servi n County Diverile Court land County Department tabula County Children S tabula County Unvenile C	Add All vices Board ces cof Job and Family Services Services Board Court	Add (*	Selected Agencies:	Remove All	Q	
Option 2 - All selections fro Generate Statewide Sum OR Select Agencies: Ada Alle Alle Alshi Ashi Ashi Ashi Ashi Ashi	m Option 1 will be negate mary Report lable Agencies: Q ms County Children Servi on County Children Servico n County Children Servico n County Juvenile Court land County Juvenile Court tabula County Juvenile Court tabula County Juvenile Court conty Children Ser	Add All vices Board ces t of Job and Family Services services Board court vices Board	bbA •	Selected Agencies:	Remove Atl	٩	

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.

Comprehensive Visita	tion Report
Begin Date: *	(mm/yyyy)
End Date : *	(mm/yyyy)
Age: *	
Report Type: *	
Option 1	
Agency: *	County Children Services Board
Population: *	~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~
Population Type: *	~ ~ · · · · · · · · · · · · · · · · · ·



Visited:	v	
Unit:	· · · · · · · · · · · · · · · · · · ·	
Supervisor:	· · · · · · · · · · · · · · · · · · ·	
Worker:	v	

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.

tion 2 - All selections from Option 1 will	be negated.				
Generate Statewide Summary Report					
8					
Select Agencies:					
Available Agencies	:		Selected Agencie	s:	
٩	Add All	Add	Remove	Remove All	۹
Adams County C	children Services Board				
Allen County Ch	Ildren Services				
Allen County Juv	venile Court				
Ashland County	Department of Job and Family Serv	lces			
Ashtabula Count	ty Children Services Board				
Ashtabula Count	ty Juvenile Court				
Athens County (Children Consisten Deard				

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 Al/AR Cases Open 65 Days & Over**, **Exclude Al/AR Cases Open 65 Days & Over**, or **Include Only Prevention Services**. When selecting Include All



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 Visita	ation Report
Begin Date: *	(mm/yyyy)
End Date : *	(mm/yyyy)
Age: *	>
Report Type: *	v

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 either 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: *	.0		~



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 <u>associated to</u> Children in Custody.

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

he Custody population includes children who are in the custody of a PCSA and/or adults associated to those children. The Non- Justody population includes children who are not in the custody of a PCSA who have an active case plan or who are members of in Ongoing, Ongoing AR, or Adoption case and/or the adults issociated to those children.	en Services Board	~
	/	

Important: When <u>one or more</u> 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 <u>if they are listed as case plan participants</u>.

Note: It is determined that an Adult is <u>associated to</u> 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.

Family Case Plan Topics	<	Child(ren) Participating in the Family Case Plan				
Parties to the Plan Completed	P	Age 0, DOB 02/01/2021 Protected under ICWA: 0	Child Location:		đ	Ì
Strengths And Needs Not Completed	SN	Agency Legal Status:	Court Case Number:	Court ID Number:	9	
Concerns Not Completed	C	Child's Permanency Goal: (a)	×		~	
Placement Information Not Completed	•	Return the child(ren) to parent/guardian/or custodian (Reunification)	~			
Visitation Not Completed	V	Add Child to Family Case Plan Relationships				
Foster Youth Rights Handbook	•					
Completed		Adult(s) Participating in the Family Case Plan				
Court and Signatures	CS		Contact Information: (123) 456-7890		ť	Ì
Approval	0	Add Advill to Femily Care Blan				_
		Add Addit to Parning Case Plan				



- 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:	ý
Unit:	~
Supervisor:	<u>`````</u>
Worker:	<u> </u>

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



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:		A Home 👻	O Recent +	Q Search +	9 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.



Ohio SACWIS	/ Loo.off County Department of Job and Family Services UAT <u>1</u> / <u>4.17.0</u> / Last Login:	🔒 Home 👻	O Recent +	Q Search +	\varTheta Help 🕞	
	It New Window Does not Open in a few sec Report Rpt369 has successfully run and the results	onds - Click here to open report displayed in a separate EXCE	EL window.			
	If you would like this report saved in the Re	port History, click the Save But	tton			
Save Cancel Revie	w Parameters					
temp (20).xlsx	~				Show all X	
< → C @ @ h	ttps:// sacwis-ust/fs.ohio.go v/sacwis/reportView.do?timeStanted=03:58:37%20PM&imageId=1&iteration=4				0. ja (ka)	1 🚳 …
Managed favorites 🛅 ODJFS 📋	Imported from Chr 🛅 Imported from Chr 😁 Statewide Automat 🔿 Sites & Applications \ominus Login 🎦 New folder	🥶 Residential Treatme 📕 Unified Access Lite		Downloads	<u>n</u> e	S Other favoriti
Ohio SACWIS	County Children Services Board		🔒 Home 👻	e temp (61) xlsx		lelp -
where the second	UAT <u>1 / 4.17.0</u> / Last Login:			See more		_
	If New Window Does not Open in a few se	conds - Click here to open report				
	Report Rpt369 has successfully run and the resul	ts displayed in a separate EXCE	L window.			
	If you would like this report saved in the R	eport History, click the Save Butte	on			
Save Cancel Review	Parameters					

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

A B C	D E F	G H I	J K L	
Child & Adult Comprehensive Visitation Report Agency Summary and Detail Report				
3				
4				
5 Supervisor Name: 6 Worker Name:				
7 Generated Date: 03/25/2016 1:36 PM				
8 Selected Date Range: 02/01/2016 - 02/29/2016				
9				
10			Section L Agency Visitation Totals	
12		Children		
13 Month/Year	Total Child Visits	Total Child Visits	Percent of Visits	
14	Needed	(Including 3+ Attempts)	Met for Children	
15 15 Education 2016		122 1.14	22.22	19.6
10 February 2010		433 I,14 133 1 14	2 33.27	76
18				
19			Section IL Child Visitation Summary	
20 Month/Year	Total Visits Needed for	Total Visits for Children	Percent of Visits Met for	
21	Children in Custody	in Custody	Children in Custody	-
22		(Including 3+ Attempts)		
23 February 2010		507 75	2 40.30	076
25		17	40.00	
26				
27				_
28			Section III. Adult Visitation Summary	-
29 Month/Year	Total Visits Needed for	Total Visits for Adults	Percentage of Visits Met	-
30	Adults Associated to	Associated to Children in	Children in Createdr	
32 February 2016	Children in Custody	785 38	21.29	29.6
33 Totals:		785 38	0 21.29	296
34	•	•	•	_
35 Section IV. Summary View				
36 Case ID Case Name Case Category	Person ID Last Name First Name	DOB Visit Month Person Visited	Population Population Type Monthly Placement Setting	Mont
37		(Yes or No)	(Child/Adult) (Custody/Non-Custody) Visit Completed	Visit
38 ONGOING		02/01/2016 No	Child Non Oustadiy No.	No.
40 ONGOING	1	02/01/2016 No	Child Custody No	No
41 ONGOING	1	02/01/2016 No	Adult Non-Custody No	No
42 ONGOING		02/01/2016 No	Adult Non-Custody No	No
43 ONGOING		02/01/2016 Yes	Adult Non-Custody No	No
44 ONGOING		02/01/2016 No	Adult Non-Custody No	No

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Monthly Placement Setting	Monthly In Home	Date of Most	Date of Most	Number of	Number of	Agency Legal Status	Placement Type
Visit Completed	Visit Completed	Recent Visit	Recent Visit	Completed Visits	Attempted Visits	(As of Last	(As of Last
(Yes/No)	(Yes/No)	Completed During Month	Completed	in Month	in Month	Day of Month)	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		
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



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:



- 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.

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1	28								
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3	31				Children in Cust	ody	Cus	tody (Including 3	3+ Attempts)
3	32 February 2016					1,785			1
3	33 Totals:					1,785			1
3	34								
_									
	os section IV. Summary View								
	36 Case ID	Case Name	Case Category	Person ID	Last Name	First Name	DOB	Visit Month	Person Visited
	Case D	Case Name	Case Category	Person ID	Last Name	First Name	DOB	Visit Month	Person Visited (Ves or No)
	36 Section 11 - Summary Tex	Case Name	Case Category	Person ID	Last Name	First Name	DOB	Visit Month	Person Visited (Ves or No)
	36 Case D 24 38 39	Case Name	Case Category ONGOING	Person ID	Last Name	First Name	DOB	Visit Month 02/01/2016	Person Visited (Ves or No) No
	36 Case ID 38 39 40	Case Name	Case Category ONGOING ONGOING	Person ID	Last Name	First Name	DOB	Visit Month 02/01/2016 02/01/2016	Person Visited (Ves or No) No No
	36 Case ID 37 Case ID 38 39 40 41	Case Name	Case Category ONGOING ONGOING ONGOING	Person ID	Last Name	First Name	DOB	Visit Month 02/01/2016 02/01/2016 02/01/2016	Person Visited (Ves or No) No No No
	30	Case Name	Case Category ONGOING ONGOING ONGOING ONGOING ONGOING	Person ID	Last Name	First Name	DOB	Visit Month 02/01/2016 02/01/2016 02/01/2016 02/01/2016	Person Visited (Ves or No) No No No No No

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.





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)



Comprehensive V	/isitation Report	
Begin Date: *	(mm)(yyy)	
End Date : *	(mm/yyyy)	
Age: *	(v)	
Report Type: *	v	

- 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.

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



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

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.



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:
 - Phone call to
 - Phone call from



- o Letter to
- o Letter from
- o Voicemail
- o Message
- Supervisor Staffing
- Email
- o **Fax**
- o Social Media
- Text Message
- 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**).

<u>Important</u>: 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.

<u>Note</u>: 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.

