

Recording an Assessment Investigation Initiated Activity Log



Knowledge Base Article

Table of Contents

Overview	3
Creating an Assessment / Investigation Initiated Activity Log	3
Completing the Activity Log	4
Completing the Required Fields to Document Initiation	4
Selecting Contact Types	5
Selecting Categories	6
Completing the Location Information Grid	7
Completing the Intake Information Tab	7
Completing the Participants Tab	8
Completing the Narrative Tab	9

Overview

This Knowledge Base Article discusses how to record an Assessment/Investigation Initiated activity log in SACWIS. The resulting data is used for NCANDS and other reporting purposes. The data may also be used to support Quality Assurance (QA) processes at your agency.

Assessment/Investigation initiation data is required for the following screened in intake types, whether emergency or non-emergency:

- CA/N (Traditional or Alternative Response)
- Dependency
- FINS Stranger Danger
- FINS Safe Haven/Deserted Child

Initiation must be documented in an Activity Log in SACWIS, and the Activity Log must have a status of Completed for the data to be mapped for reporting purposes.

The initiation Activity Log must be Completed to before the Disposition can be marked Completed, and before the associated CAPMIS tools can be routed for approval.

The required details of the Activity Log and related validations are discussed in more detail in this article.

Creating an Assessment / Investigation Initiated Activity Log

From the SACWIS Home screen

1. Click the **Case** tab.
2. Click the **Workload** tab.



The **Case Workload** screen appears.

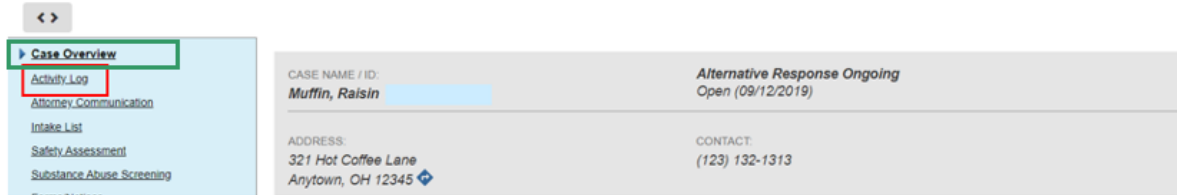
3. On the Case Workload screen, click the appropriate Case Number ID link.



The **Case Overview** screen appears.

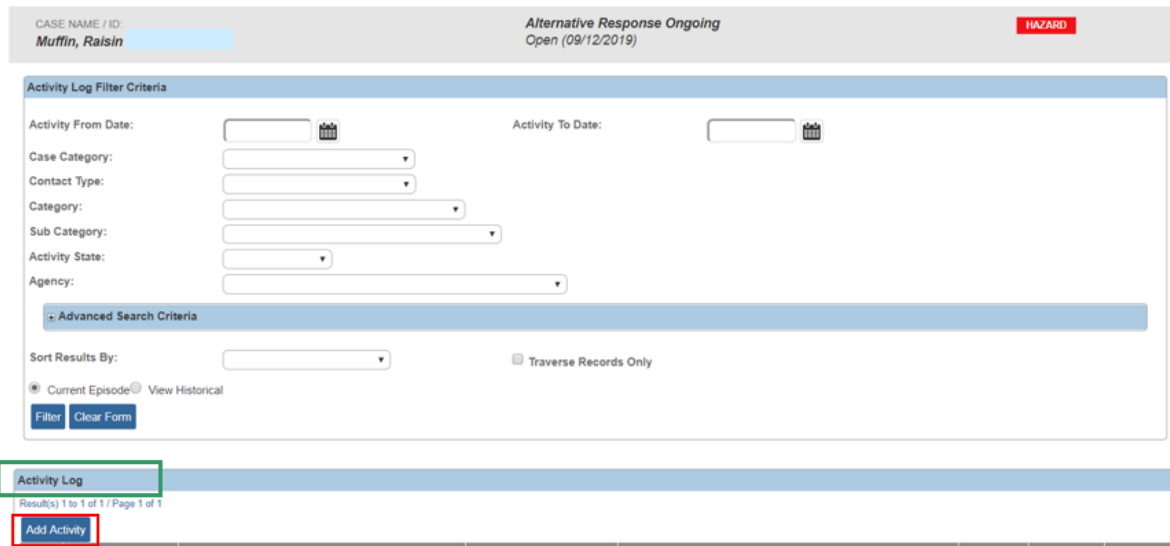
Completing the Activity Log

1. On the Case Overview screen, click the **Activity Log** link in the Navigation pane on the left.



The **Activity Log** screen appears.

2. Click, **Add Activity** in the **Activity Log** grid.



The **Activity Details** screen appears with the **Start Activity Date** and **Responsible Worker** automatically populated to match the current date and the logged-in worker.

Important:

The information that appears in the default fields can be changed, as needed.

Completing the Required Fields to Document Initiation

1. In the **Activity Details** grid, verify the **Start Activity Date** is correct, or enter another date.
2. Enter the **Start Time**.
3. Enter the appropriate **End Activity Date**.
4. Enter the **End Time**.
5. Verify the **Responsible Worker** is correct. Otherwise, select the appropriate worker from the drop-down list.

Important:

It is imperative the dates entered correctly reflect the initiation of the Assessment/Investigation. For initiation requirements, see rules 5101:2-36-03 through 5101:2-36-07 and 5101-2:36-20 at <http://emanuals.ifs.ohio.gov/FamChild/FCASM/SocialServices/>.

The Start Activity Date must not be earlier than the Screening Decision Date/Time of the Intake.

Selecting Contact Types

- In the **Contact Types** grid, select the appropriate contact type(s) from the list of **Available Contact Types**. More than one type can be selected, however, at least one of the following types must be selected to meet the requirements for initiation:
 - Announced Home Visit
 - Unannounced Home Visit
 - Face-to-Face
 - Interviews
 - Office Visit
 - Letter To (Alternative Response Only)
- Click **Add** (activated when you select a Contact Type) to move the selection(s) to the **Select Contact Types** field.

Selecting Categories

1. In the **Category Information** grid, select one of the following from the **Case Category** drop-down menu:
 - Assessment/Investigation
 - Alternative Response Assessment
 - Ongoing
 - Alternative Response Ongoing
 - Adoption

Important:

The system defaults to the current case category, but it can be changed.

To ensure all Intake Participants will be available for selection on the participants tab, select Assessment/Investigation or Alternative Response Assessment.

If you select Ongoing, AR Ongoing, or Adoption, the Participants tab will display Case Participants, Associated Persons, and Placement Providers for selection.

2. From the **Category** drop-down menu, select, **Assessment/Investigation Mandate**.
3. In the **Available Sub Category** field, select **Assessment/Investigation Initiated**, as well as any other applicable Sub Categories.
4. Click **Add** to move the selection(s) to the **Select Sub Categories** field.

The screenshot displays the 'Category Information' form. At the top, the 'Case Category' dropdown is set to 'Assessment/Investigation'. Below it, the 'Category' dropdown is set to 'Assessment/Investigation Mandate'. The 'Available Sub Categories' list includes 'Assessment/Investigation Initiated', which is highlighted. The 'Add' button is visible. The 'Select Sub Categories' field is currently empty. The 'Other Sub Category' field is also empty.

Important: If initiation was made by an attempted or successful face-to-face contact, add all relevant sub-categories to ensure all efforts are counted for data reporting and case management purposes. This data drives certain Assessment/Investigation Action Items, and populates reports such as the Intake Assessment/Investigation Face-to-Face Contact report and the A/I Checklist.

Additionally, you will only be able to associate Participants to the Activity Log if there is at least one Sub Category selected in addition to Assessment/Investigation Initiated. If no additional Sub Category is selected, you will not be able to associate any participant, nor will participants be required.

Completing the Location Information Grid

1. In the Location Information grid (optional), select the applicable location from the Location Type drop-down menu.
2. Complete Other Location and Location Details (optional) if you wish to provide more specific information about the location of the contact.
3. Click the **Intake Info** tab.

The screenshot shows the 'Intake Info' tab selected. The 'Location Information' section contains a 'Location Type' dropdown menu with 'Parent/Caregiver Home' selected. Below it are text input fields for 'Other Location' and 'Location Details'. At the bottom of this section are 'Spell Check', 'Clear', and a counter '209'.

Completing the Intake Information Tab

The **Intake Information** tab page appears, displaying a list of Intakes linked to the Case for the Current Case Episode and Historical Case Episode(s).

1. Click the **Participants** tab.

The screenshot shows the 'Intake Information' tab with the 'Participants' sub-tab selected. Below the navigation tabs, case information is displayed: 'CASE NAME / ID: Adoption / Open (10/21/2016)', 'Activity Log ID: 0', and 'Activity Start Date: 10/25/2019'. The 'Current Intake List' table is shown below.

Intake ID	Screening Decision	Date	Category	Type(s)	Agency
[Redacted]	Screened In	10/02/2019	CAN Report	Neglect	[Redacted]

Historical Intake List						
Intake ID	Screening Decision	Date	Category	Type(s)	Agency	

Completing the Participants Tab

Activity Details	Intake Info	Participants	Visitation Plans	Narrative
CASE NAME / ID: <i>Muffin, Raisin</i>		Alternative Response Ongoing / Open (09/12/2019)		
Activity Log ID:		Activity Start Date: 10/03/2019		

The **Participants** tab page appears, displaying the **Associate Participants** grid.

Important: Depending on the Case Category selected on the Activity Details tab, the page will show either a list of **Intake Participants** (displayed in the graphic below),

Activity Details	Intake Info	Participants	Visitation Plans	Narrative
CASE NAME / ID: <i>Muffin, Raisin</i>		Alternative Response Ongoing / Open (09/12/2019)		
Activity Log ID:		Activity Start Date: 10/01/2019		
Associate Participants				
Intake Participants (includes all Participants for the intake(s) selected on the Intake Info tab)				
		Contact Status		
Muffin, Cinnamon - 09/19/2019	<input checked="" type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed <input type="radio"/> In Regards To			
Muffin, Raisin - 11/11/1999	<input checked="" type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed <input type="radio"/> In Regards To			

OR,

a list of **Case Participants**, **Case Associated Persons**, and **Placement Providers**, as applicable (displayed by the graphic below).

1. Select the relevant **Contact Status** for each Participant by clicking the appropriate radio button.
2. Click the **Narrative** tab.

Activity Details	Intake Info	Participants	Visitation Plans	Narrative
Associate Participants				
Case Participants				
		Contact Status		
Potter, Harry - 07/31/2019	<input checked="" type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed <input type="radio"/> In Regards To			
Potter, James - 04/01/1990	<input checked="" type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed <input type="radio"/> In Regards To			
Potter, Lilly - 08/08/1990	<input checked="" type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed <input type="radio"/> In Regards To			
Case Associated Persons				
		Contact Status		
Dumbledore, Albus - 03/03/1943	<input checked="" type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed			
McGonagall, Minerva - 09/09/1959	<input checked="" type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed			
Weasley, Molly	<input checked="" type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed			
Placement Providers				
		Contact Status		
	<input checked="" type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed			

Completing the Narrative Tab

The **Narrative** screen displays.

1. Record the **Narrative Details** of the initiation contact.
2. In the **Activity State** field, select **Completed** from the drop-down list.

Important: If you do not choose Completed, the activity log remains in Draft status and none of the information will be counted in reports. The Activity State field must have a Completed status to map the data.

3. Click **Save**.

Activity Details Intake Info Participants Visitation Plans **Narrative**

CASE NAME / ID: **Muffin, Raisin** *Alternative Response Ongoing / Open (09/12/2019)*

Activity Log ID: 0 Activity Start Date: 10/08/2019

Associated Participants : No Selected Associate participants for this activity log

Narrative Information

To document quality face to face visits, please consider the following:

- Describe each child's current safety, risk, vulnerability, progress toward permanency goals, achievement of case plan goals and overall well-being
- Describe each parent/caregiver/other adult's protective capacities, ability to meet the needs of the child(ren), progress toward permanency goals, achievement of case plan goals and overall well-being
- Describe the household composition, observations of the home environment (including basic needs) and the current level of involvement of the non-custodial parent.

Narrative Details

Narrative: *
(expand full screen)

Spell Check Clear 10000

Narrative History

Type	Date/Time Created	Created By	Agency
------	-------------------	------------	--------

Insert Connector View Narrative

Activity State: * Completed ▾

Apply **Save** Cancel Delete

The **Activity Log** list screen appears, displaying the new record. The Activity State column displays as **Completed**.

Activity Log

Results: 1 to 2 of 2 / Page 1 of 1

Add Activity

	Activity Date	Contact Type	Category	Sub Category	Created By	Activity State	Narrative
SDI SDI	10/01/2019 1:00 PM	Announced Home Visit - Face-to-Face	Assessment/Investigation Mandate	ACV Face to face , AP Face to Face , Assessment/Investigation Initiated		Completed	

Associated Participants: Raisin Muffin , Cinnamon Muffin

Note: If you return to the Intake List from the left navigation, you will see the initiation in the grid. The initiation date/time is also a hyperlink to view the initiation activity log just completed.

The screenshot shows the SACWIS interface for Case Name / ID: Muffin, Raisin. The status is 'Alternative Response Ongoing' and 'Open (09/12/2019)'. The 'Current Case Episode Intake List' table is as follows:

Intake ID	Status	Decision Date - Time	Category	Type	Initiation Date/Time	Case Disposition Disposition Date	Investigation/ Assessment Completion Date	Agency Name
100010	Screened In AR	10/01/2019 12:57 PM	CA/N Report	Physical Abuse	10/01/2019 01:00 PM			
100010	Screened In AR	09/12/2019 08:45 AM	CA/N Report	Physical Abuse	09/12/2019 08:46 AM	Alternative Response	09/12/2019	

Below the table are buttons for 'Record Disposition(s)' and 'Change Disposition(s)'. Below that is the 'Historical Case Episode(s) Intake List' section, which is currently empty.

Note: If you return to the Intake List from the navigation pane, you can now see the initiation in the grid. The initiation date/time is also a hyperlink to view the initiation activity log they just completed.

Note: The system will check to make sure an Initiation Activity Log has been completed for the Intake(s) to complete the Safety Assessment, Family Assessment, Ongoing Case A/I, Specialized A/I, or a waiver of any of these tools for the specified Intake. The system will also require the completed Initiation Activity Log to complete the Disposition for the Intake.

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