Recording an Assessment Investigation Initiated Activity Log

Knowledge Base Article

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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.

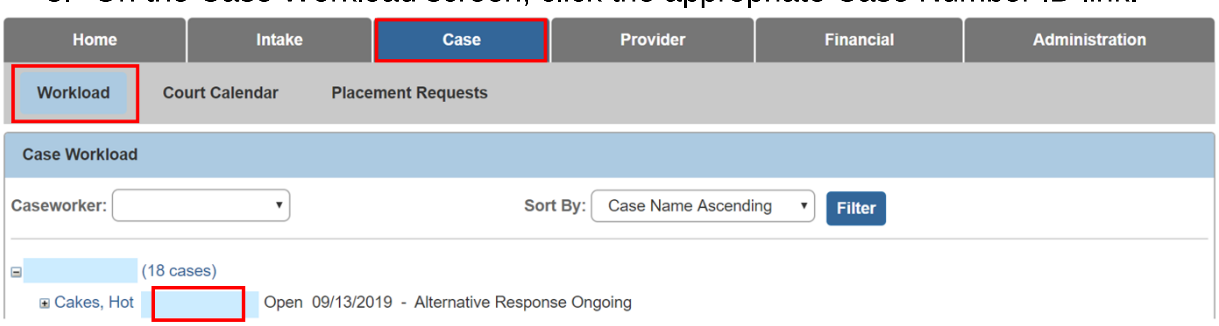
Creating an Assessment / Investigation Initiated Activity Log

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.



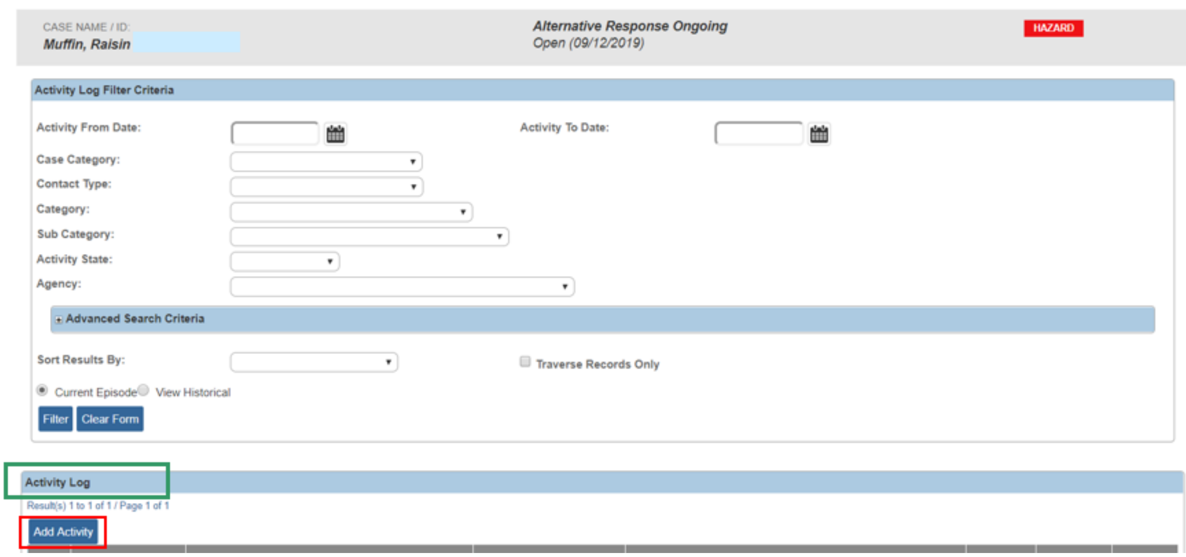
The **Case Overview** screen appears.

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.



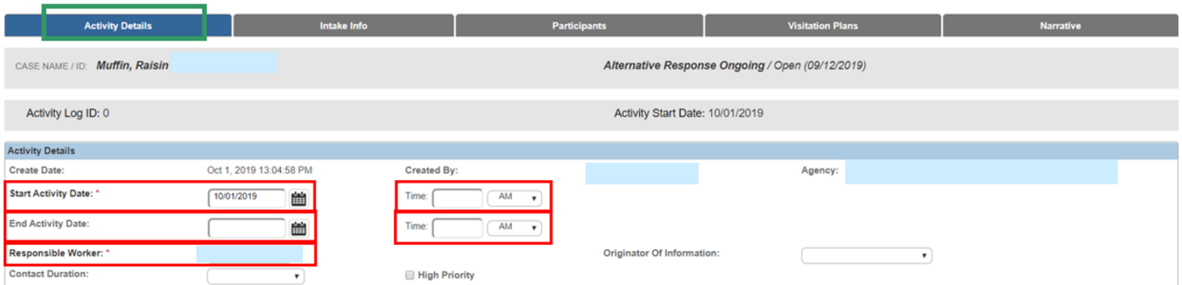
The **Activity Details** screen appears with the **Start Activity Date** and **Responsible Worker** automatically populated to match the current date and the logged-in worker.

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:

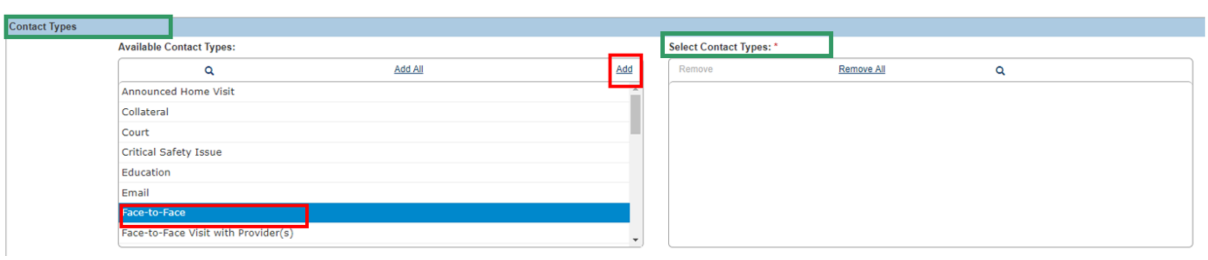
It is imperative the dates entered correctly reflect the initiation of the Assessment/Investigation. For initiation requirements, see rules 5101:2-36-03 through 5101:2-36-07 and 5101-2:36-20 at http://emanuals.jfs.ohio.gov/FamChild/FCASM/SocialServices/ .

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

Selecting Contact Types

1. 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)

2. 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

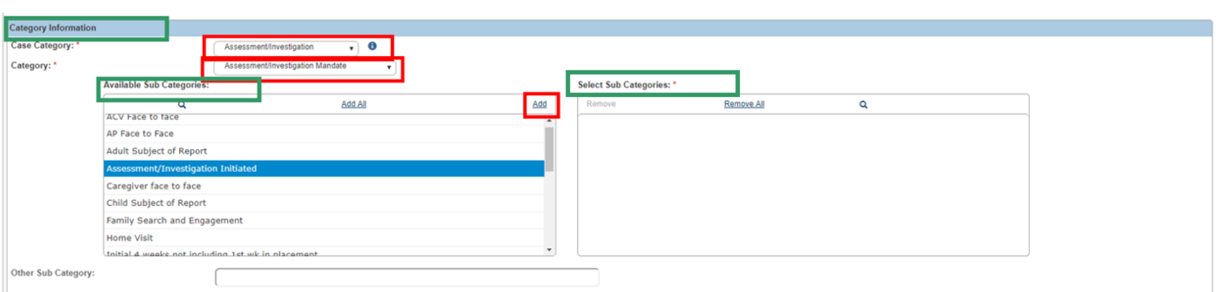
   Important:

   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.

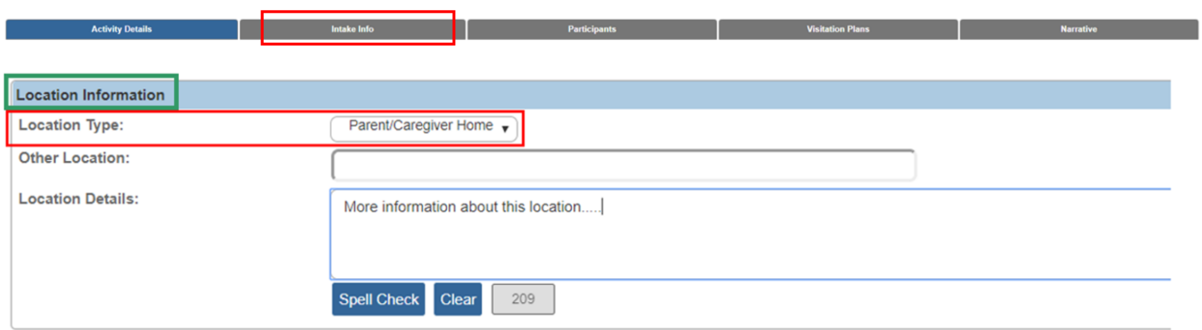


Important: If initiation was made by an attempted or successful face-to-face contact, add all relevant sub-categories to ensure all efforts are counted for data reporting and case management purposes. This data drives certain Assessment/Investigation Action Items, and populates reports such as the Intake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

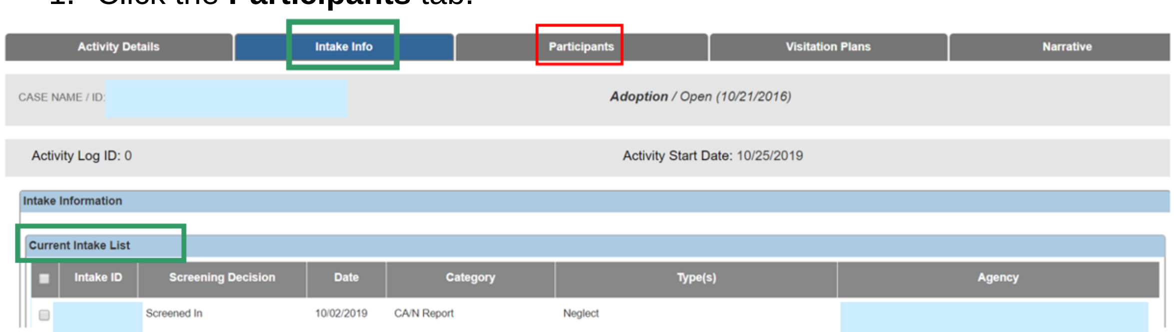
1. In the Location Information grid (optional), select the applicable location from the Location Type drop-down menu.
2. Complete Other Location and Location Details (optional) if you wish to provide more specific information about the location of the contact.
3. Click the **Intake Info** tab.

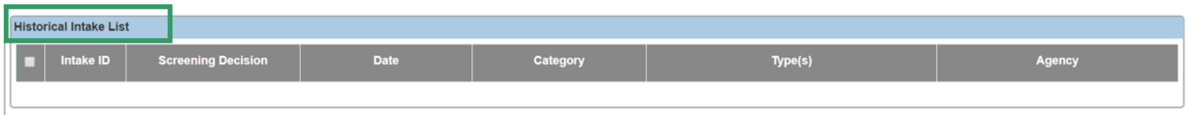


Completing the Intake Information Tab

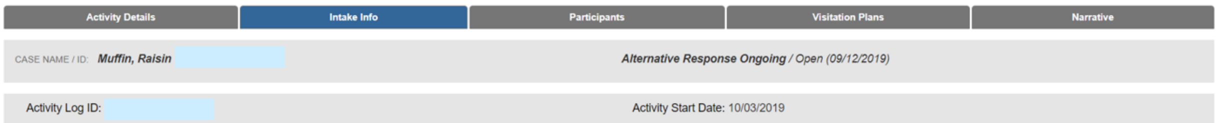
The **Intake Information** tab page appears, displaying a list of Intakes linked to the Case for the Current Case Episode and Historical Case Episode(s).

1. Click the **Participants** tab.



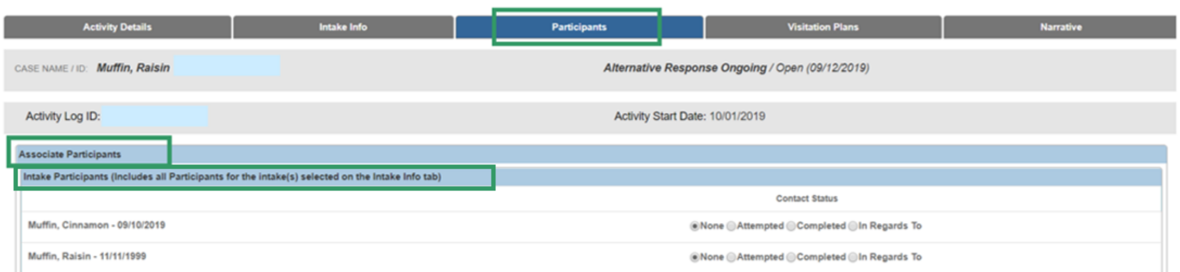


Completing the Participants Tab



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

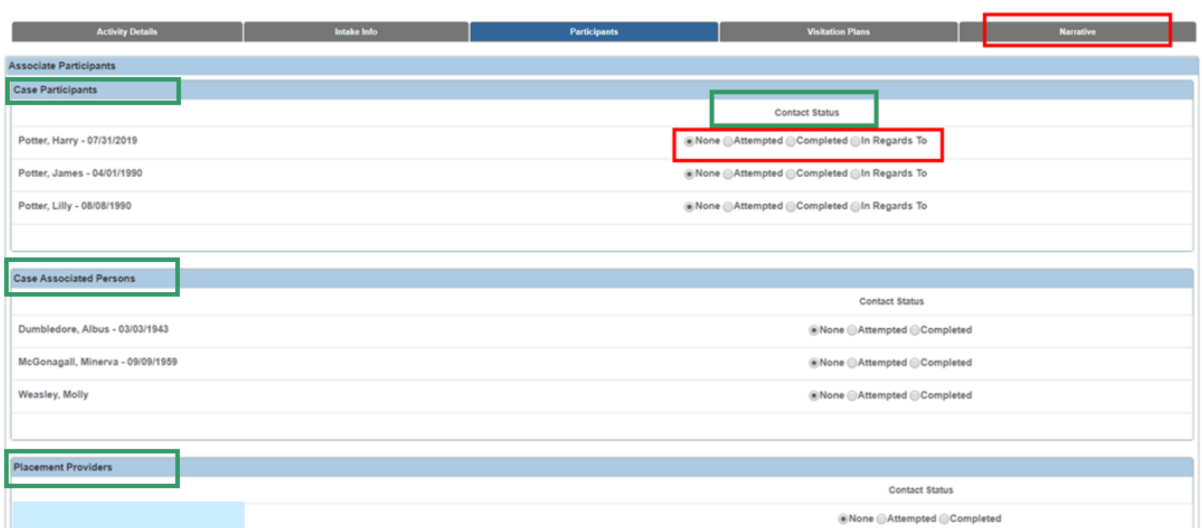
> **Important**: Depending on the Case Category selected on the Activity Details tab, the page will show either a list of **Intake Participants** (displayed in the graphic below),



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.



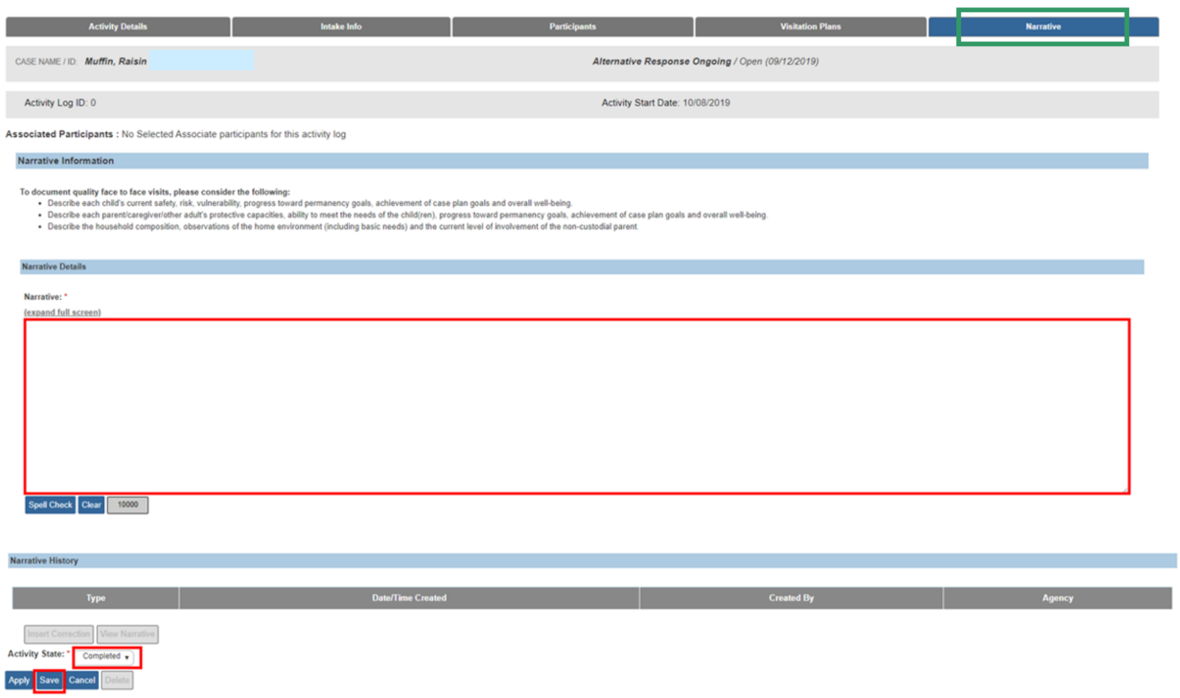
Completing the Narrative Tab

The **Narrative** screen displays.

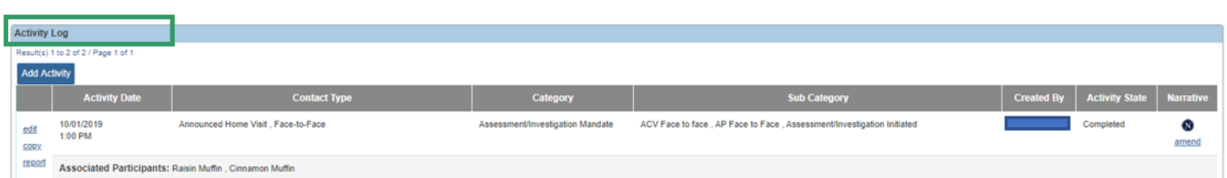
1. Record the **Narrative Details** of the initiation contact.
2. In the **Activity State** field, select **Completed** from the drop-down list.

   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.

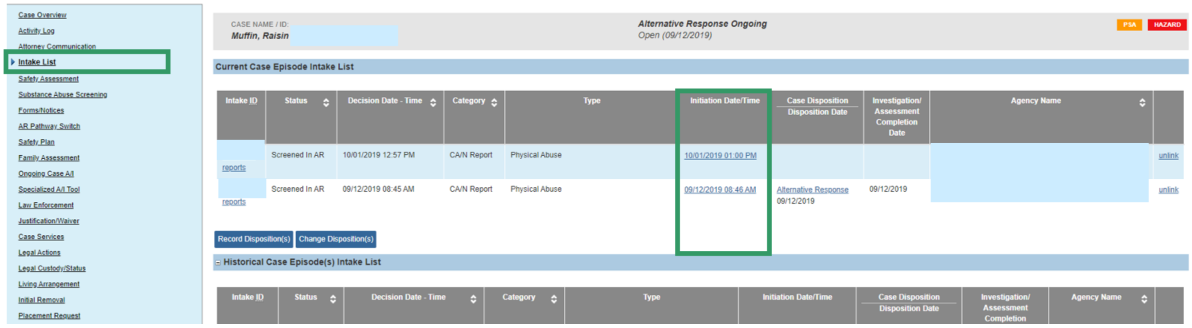
3. Click **Save**.



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



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.



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.