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.

	Home	Intake	Case	Provider	Financial	Administration
Workload	Court Calendar	Placement Requests				

The Case Workload screen appears.

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

Home	Home Intake		Provider	Financial	Administration				
Workload Co	urt Calendar Place	ment Requests							
Case Workload									
Caseworker:	T	Sol	t By: Case Name Ascendi	ng v Filter					
■ (18 ca ■ Cakes, Hot	open 09/13/20	19 - Alternative Respor	se Ongoing						



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.

<>		
Activity_Log Attorney_Communication	CASE NAME / ID: Muffin, Raisin	Alternative Response Ongoing Open (09/12/2019)
Intake List Safety Assessment Substance Abuse Screening	ADDRESS: 321 Hot Coffee Lane Anytown, OH 12345 💠	CONTACT: (123) 132-1313

The Activity Log screen appears.

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

CASE NAME / ID: Muffin, Raisin		HAZARD		
Activity Log Filter Criteria				
Activity From Date:	<u> </u>	Activity To Date:	#	
Case Category: Contact Type:	T			
Category:	· · · · · · · · · · · · · · · · · · ·			
Activity State:	· · · · · ·	•		
Agency:		•		
± Advanced Search Criteria				
Sort Results By: Current Episode View Historica	•	Traverse Records Only		
Filter Clear Form				
Activity Log				
Result(s) 1 to 1 of 1 / Page 1 of 1				
Add Activity				

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.

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Activity Details	Intake Info	Pa	rticipants	Visitation Plans	Narrative
CASE NAME / ID: Muffin, Raisin			Alternative Respon	se Ongoing / Open (09/12/2019)	
Activity Log ID: 0			Activity Start Date	: 10/01/2019	
Activity Details					
Create Date:	Oct 1, 2019 13:04:58 PM	Created By:		Agency:	
Start Activity Date: *	10/01/2019	Time: AM v			
End Activity Date:	(Time: AM v			
Responsible Worker: *			Originator Of Informat	ion:	
Contact Duration:	· · ·	High Priority			

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

- 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.

Contact Types						
	Available Contact Types:			Select Contact Types: *		
	۹	Add All	Add	Remove	Remove All	۹
	Announced Home Visit					
	Collateral					
	Court					
	Critical Safety Issue					
	Education					
	Email					
	Face-to-Face					
	Face-to-Face Visit with Provider(s)					



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.

Category Information		
Case Category: *	Assessment/Investigation 🔹 🕥	
Category: *	Assessment/Investigation Mandate	
	Available Sub Categories:	Select Sub Categories: *
	Q Add All	Add Remove Remove All Q
	AP Face to Face	
	Adult Subject of Report	
	Assessment/Investigation Initiated	
	Caregiver face to face	
	Child Subject of Report	
	Family Search and Engagement	
	Home Visit	
	Initial 4 weeks not including 1st wk in placement	×
Other Sub Category:		



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.

Activity Details		Intake Info	Participants	Visitation Plans	Narrative			
Location Information								
Location Type:		Parent/Caregiver	Home 🔻					
Other Location:		[
Location Details:	Location Details: More information about this location							
		Spell Check Cle	ear 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.

Activity Deta	ails	Intake Info		Participants	Visitation Plans	Narrative		
			-					
CASE NAME / ID:	Adoption / Open (10/21/2016)							
Activity Log ID: 0				Activity Start D	ate: 10/25/2019			
Intake Information								
Current Intake List	Current Intake List							
Intake ID	Screening Decision	Date	Category	Туре(\$)	Agency		
	Screened In	10/02/2019	CA/N Report	Neglect				



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: Muffin, Raisin	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	Intake Info		Visitation Plans	Narrative				
CASE NAME / ID: Muffin, Raisin		Alternative	Response Ongoing / Open (09/12/2019)					
Activity Log ID:		Activity St	art Date: 10/01/2019					
Associate Participants Intake Participants (Includes all Participants for the intake(s) selected of	on the Intake Info tab)	1						
			Contact Status					
Muffin, Cinnamon - 09/10/2019	- 09/10/2019							
Muffin, Raisin - 11/11/1999		None Attempted Completed 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		Non	e OAttempted OCompleted OIn Regards To						
Potter, James - 04/01/1990		Non	e OAttempted OCompleted OIn Regards To						
Potter, Lilly - 08/08/1990		Non	e OAttempted OCompleted OIn Regards To						
Case Associated Persons									
			Contact Status						
Dumbledore, Albus - 03/03/1943			None Attempted Completed						
McGonagall, Minerva - 09/09/1959			None Attempted Completed						
Weasley, Molly			None Attempted Completed						
Placement Providers									
			Contact Status						
	None Attempted Completed								

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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.

A Merrik PA Merrik Attendre Rasponse Ongoling / Open (9kr 12021) Attendre Rasponse Ongoling / Open (9kr 12021) Attendre Rasponse Ongoling / Open (9kr 12021) Attendre Ras	Activity Details	intake info	Participants	Visitation Plans		Narrative						
Advay tog 0, 0 Active years in a conserver of the standard particular and in a conserver of the standard particular and in a conserver of the standard conserver of the standa	CASE NAME / ID: Muffin, Raisin	In, Raisin Alternative Response Orgoing / Open (09/12/2019)										
accelered Participants : No Selected Associate participants for the activity tog	Activity Log ID: 0		Activity 5	start Date: 10/08/2019								
Narrative information To focus multiply faces the set with phase consider de Monology I De Octe and Distributing in Advanced promotion goals, achievement of case plan goals and everal web beins. Discribe and parent carefying the set data with methic inducting basic seted) and the control twi of Inducement of Case plan goals and everal web beins. Narrative : Discribe and parent carefying the set data with methic inducting basic seted) and the control twi of Inducement of Case plan goals and everal web beins. Narrative : Discribe and parent carefying the theme environment (including basic seted) and the control twi of Inducement of Case plan goals and everal web beins. Narrative : Discribe the based composition, described and the control twi of Inducement of the set of Case data goals. Narrative : Discribe the based composition, described and the control twi of Inducement of Case plan goals and everal web beins. Narrative : Discribe the based composition, described and the control twi of Inducement of Case plan goals and everal web beins. Narrative : Discribe the based composition, described and the control twi of Inducement of Case plan goals and everal web beins. Narrative : Discribe the based composition, described and the control twi of Inducement of Case plan goals and everal web beins. Narrative : Discribe the based composition, described and the control twi of Inducement of Case plan goals and everal web beins. Discribe the based composition, described and the control twi of Inducement of Case plan goals and everal web beins. Discribe the based composition of the home environment (inducement of Case plan goals and everal web beins. Discribe the based composition of Case plan goals and everal web beins. Discribe the based composition of the home environment (inducement of Case plan goals and everal web beins. Discribe the based composition of the home environment (inducement of Case plan goals and everal web beins. Discribe the based composition of the home environment of the based composition of the based	Associated Participants : No Selected Associate participants for this activity log											
To locate data from the field of the field o	Narrative Information											
Nradve Odela's Spad Dood Caar 1000 radve History Type Data/Time Created Created Sy Agency Writh State: Created Sy Agency	To document quality face to face visits, please consider the following: Describe each old's current safet, risk, violentability, progress toward permanency goals, achievement of case plan goals and overall well-being. Describe each participacylevident adds protective quadratics, ability for most the needs of the childy(ne) progress toward permanency goals, achievement of case plan goals and overall well-being. Describe each participacylevident adds protective quadratics, ability for most the needs of the childy(ne) 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.											
Image: Second Bill screene Image: Second Bill screene Image: Second Bill screene Type Date/Time Created Created By Agency Image: Second Bill Screene Wry State: Company Second Bill Screene Agency	Narrative Details											
Spall Check Check 10000 Spall Check Check 10000 rrative History Type Date/Time Created Created By Agency Number Constrainty State: Tomore Created Created By Agency	Narrative: *											
Spell Check Case 19000 reacher History Type Date/Time Created Type Date/Time Created Created By Agency	(comparing count as control)						٦					
spel Cuck Cur 1000 realwe Histor Type DatoFine Created Created Realwor Wry Statr: Compared												
spel Cues Cue 1000 realer realer Histor Type DatoFine Created Created Created By Agency instance Cuesting Units Humphine http: State: Comparison												
Spell Cases Case Spell Spell Cases Case Spell Type Data/Time Created Created By Marcy												
Spell Cases, Case Cases Cases Instant Cases of Cases DataFilmer Created Created By Agency Stant Cases of Cas												
speet Cased. Case 1900 resolve History Type DataFines Created Created By Agency State: Comparison												
rrabber History Type Data/Time Created Created By Agency Wirdy State: Complete P Interview Interview <td>Spell Check Clear 10000</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>4</td>	Spell Check Clear 10000						4					
Type Data/Time Created Created By Agency Start Connection Created By Agency Agency <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>												
Type Data/Time Created Created By Agency Start Completion Wind Start Completion Image: Completion of the start of the	Narrative History											
Type United Jame Lineard Created by Agency												
Insert Correction Wew Narrative	туре	Date/I ime Created		Created By		Agency						
WWY State: Consisted	Insert Correction View Narrative											
	Activity State: Completed											

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

1	Activity L	.og						
ľ	Result(s) 1	to 2 of 2 / Page 1 of 1						
	Add Act	Activity Date	Contact Tune	Catagony	Sub Category	Created Du	Activity State	Narrativo
		Activity Date	Contact type	Category	Sub Category	Created by	Activity State	Narrauve
	edit SORX	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	S amend
	report	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.

Case Overview Activity-Log Attorney Communication	CASE NAME I D. Alternat Muttin, Raisin Open (01						ve Response Ongoing //12/2019)					PSA HAZARD	
Intake List	Current Case Episode Intake List												
Safely Assessment Substance Abuse Screening Forms/Holices	Intake <u>ID</u>	Status 🛟	Decision Date - Time 👌	Category 🛟		Туре	Initiation Date/Time	Case Disposition Disposition Date	Investigation/ Assessment Completion	Agency Name		\$	
AR Pathway Switch Safety Plan									Date				
Eamily Assessment Onoping Case All	reports	Screened In AR	10/01/2019 12:57 PM	CA/N Report	Physical Abuse		10/01/2019 01:00 PM					unlink	
Specialized A/I Tool	reports	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	09/12/2019			unlink	
Justification/Waiver													
Legal Actions	Record Disposition(s) Change Disposition(s)									_			
Legal Custody/Status Living Arrangement													
Initial Removal Placement Resuest	Intake (0) Status Decision Date - Time Category Category Category Category Type Initiation Date/Time <u>Case Disposition</u> Investigation/ Disposition Date - Time Case Disposition Date - Time Disposition Date - Time Case Disposition Date - Time Case Disposition Date - Time Disposition Date - Time - Disposition Date - Time - Disposition Date - Disposit									\$			

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.

