

# **Knowledge Base Article**

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#### **Overview**

This article describes how to access Critical Incident Reports and Filter the Views within the Ohio Certification for Agencies and Families (OCAF) system.

### **Navigating to Critical Incident Reports**

1. Once you've gained access to the OCAF system, you will be navigated to the **Home** screen.



- 2. From the Home screen, locate All New Critical Incident Reports.
- 3. Click All New Critical Incident Reports.

5 items Agency	Incident Report All New Cr • Sorted by Incide Name • Updated	s <b>itical Incident Reports</b> ent Number • Filtered by All incident reports - Status 17 minutes ago	s, Record Type, Use	er Q	Search this list	tột +	C
	Inci 🕇 🗸	Name of Provider Agency $\sim$	Involve $\lor$	Date of t \	🗸 Status 🗸	Created Date $\sim$	
1	000001	Lighthouse Youth Services, Inc.	1234567	7/22/2024	New	7/23/2024 12:14 PM	
2	000002	Lighthouse Youth Services, Inc.	1234567	7/22/2024	New	7/23/2024 12:15 PM	•
3	000003	Unk's Place	12345567	8/29/2024	New	8/29/2024 3:12 PM	•
4	000004	Unk's Place	2134566	8/29/2024	New	8/29/2024 3:14 PM	•
5	000005	Trumbull County Children Services Board	Test	9/16/2024	New	9/16/2024 3:21 PM	•

The New Critical Incident Reports tab displays.



### **Filtering List Views**

- 1. Click the List Views Controls gear.
- 2. Select **Clone** from the dropdown menu.

* * * * * * *	Ohio	Certification f		Home	~	🖵 All New	v Critical Incid	~ ×					
5 ite	Incide All I ms • Sorte	ent Reports New Critical Ir ed by Incident Numbe	ncider r • Filtere	nt Reports ▼ 📝	Status, R	ecord Type, U	lser Agency		Search this list	New	As	sign Label Chang	ge Status
Nam		Incident 1 ~	Name	of Provider Agency		~	Involved Chil	. ~	Date of the in	LIST VIEW CONT	ROLS	ted Date	~
1		000001	Lighth	ouse Youth Services, Inc.			1234567		7/22/2024	New		2024 12:14 PM	•
2		000002	Lighth	ouse Youth Services, Inc.			1234567		7/22/2024	Clone		2024 12:15 PM	
3		000003	Unk's I	Place			12345567		8/29/2024	Rename		2024 3:12 PM	
4		000004	Unk's I	Place			2134566		8/29/2024	Sharing Settings		2024 3:14 PM	
5		000005	Trumb	ull County Children Servio	ces Boai	rd	Test		9/16/2024	Colort Fields to Dis		2024 3:21 PM	•
										Delete Reset Column Widt	hs		

- 3. Rename the List Name.
- 4. Rename the List API Name if applicable.
- 5. Select Only I can see this List View.
- 6. Click the **Save** button.

F	Clone List View
t Ib	* List Name Testing Copy of List Views
of	* List API Name  Testing_Copy_of_List_Views
us ac ac	Who sees this list view?  Only I can see this list view  All users can see this list view  Share list view with groups of users
	Cancel

The Cloned list displays with the Filter options open.

Note: If the Filter options are not open, click the Filter button. Shown in green below.



- 7. Click the **Filter by Owner** option.
- 8. Select My Incident Reports.
- 9. Click the **Done** button.

	Ohio	Certificat	ion f	Home		~	🖵 Testing Copy	of List 🗸	×					11617
5 item	Incide <b>Test</b> ns • Sorte • Updat	ent Reports <b>ing Copy</b> ed by Incident I ed a few secon	of List Vie Number • Filtered ads ago	ws ▼ 🗶	) reports -	- Status, R	ecord Type, User Ag	ency	Q Se	arch this list	New	Assign Label	Change Status	
		Inc ↑ ∨	Name of Pro	vider 🗸 🛛	nvolve	Filter by	y Owner incident reports				Filters		>	×
1		0000	Lighthouse Yo	outh S 1	123456	My	incident reports							
2		0000	Lighthouse Yo	outh S 1	123456	O Filt	er by scope				Filter by	Owner		
3		0000	Unk's Place	1	123455	Qu	eue owned inciden	t reports 🕕			All incid	ent reports		
4		0000	Unk's Place	2	213456						Matching	all of these filters		
5		0000	Trumbull Cour	nty C 1	lest .					Done	Record T equals	ype Critical Incident Repo	×	
											Status equals	New	×	
											User Age equals	ency Name True	×	

10. Click the **Save** button.

**Note:** This will show all the Critical Incident Reports for your agency. You can then add additional filters.

5 items Name	Incide <b>Test</b> • Sorte Update	nt Reports <b>ing Copy</b> d by Incident I ed 7 minutes a	r <b>of List Views ▼</b> Number • Filtered by All incide Igo	🖈 nt reports - Statu:	s, Record Type, Use	er Agency	Q Search this	; list	Nev	v Assign Label	Change Status
		Inc ↑ ∨	Name of Provider $\lor$	Involve $\lor$	Date of $\lor$	St $\lor$	Created Date	$\sim$	Cance	1	Save 🔻
1		0000	Lighthouse Youth S	1234567	7/22/20	New	7/23/2024 12:14 P	(	▼	]	
2		0000	Lighthouse Youth S	1234567	7/22/20	New	7/23/2024 12:15 P		Filter b	v Owner	
3		0000	Unk's Place	123455	8/29/20	New	8/29/2024 3:12 PM		My inc	ident reports	
4		0000	Unk's Place	2134566	8/29/20	New	8/29/2024 3:14 PM		▼ Natahia		
5		0000	Trumbull County C	Test	9/16/20	New	9/16/2024 3:21 PM			g all of these filters	
									Record equals	Type Critical Incident Report	×

A Notification displays that your List View has been updated.



Your updated List View tab displays.

Department of Job & Family Services	Q Search	····		★▼ 🕀 🍣 ? 🅸 🐥	6
Ohio Certification f	Home	✓ 📮 Testing Copy of List	~ ×		
Incident Reports Testing Copy of List Vie 0 items • Sorted by Incident Number • Filtere Name • Updated a minute ago	ews 🔻 🖈	Status, Record Type, User Agency	Q Search this list	New     Assign Label     Change Stat       Image: Change State     Image: Change State	us
□ Inciden ↑ ∨ Name o	of v Involved v	✓ Date of t ∨ Status	✓ Created D ✓	Filters	×
				Filter by Owner My incident reports	

#### **Filter By Date**

- 1. From the Filter menu, click the **Add Filter** button.
- 2. Select **Date of the Incident** from the Field dropdown menu.
- 3. Select **Greater or Equal** from the Operator dropdown menu.
- 4. Provide a **Date** for the Value.
- 5. Click the **Done** button.

5 items	Incide All N • Sorte • Update	ent Reports <b>New Criti</b> e d by Incident I ed 2 minutes a	cal Incident Report Number • Filtered by All incide go	s 2 ▼ nt reports -	🖈 Status	i, Record Type, Us	er Agency	Q Search this list.		New Assign Label	Change Status
		Inc ↑ ∨	Name of Provider $\vee$	Involve	. ~	Date of $\vee$	St ∨	Created Date $\lor$		Cancel	Save 🔻
1		0000	Lighthouse Youth S	1234567		7/22/20	New	7/23/2024 12:14 P	•		
2		0000	Lighthouse Youth S	1234567		7/22/20	New	7/23/2024 12·15 P	-	Status	×
3		0000	Unk's Place	123455	Field					equals New	
4		0000	Unk's Place	213456	Da	te of the incider	ıt		•		
5		0000	Trumbull County C	Test						equals True	×
					Opera	ator					
					gre	eater or equal			•]	New Filter*	×
									1		
					Value	Ş				Add Filter	Remove All
					11,	/01/2024				A LL Million Longing	
										Add Hiter Logic	•
) Omni	-Chann	el (Offline)						Done			

The New Filter is displayed within the Filter options. Shown in green below:



5 items Name	Incide All I s • Sorte • Updat	ent Reports <b>New Criti</b> ed by Incident I red 7 minutes a	<b>cal Incident Report</b> Number • Filtered by All incide Igo	<b>s 2 ▼</b> 💉	s, Record Type, Us	er Agency	Q Search this list		New     Assign Label       Image: Ima	Change Status	7
		Inc↑∨	Name of Provider $\vee$	Involve $\lor$	Date of $\lor$	St ∨	Created Date $\lor$		Cancel	Save 💌	1
1		0000	Lighthouse Youth S	1234567	7/22/20	New	7/23/2024 12:14 P	•			_
2		0000	Lighthouse Youth S	1234567	7/22/20	New	7/23/2024 12:15 P		Status	×	
3		0000	Unk's Place	123455	8/29/20	New	8/29/2024 3:12 PM		equals New		
4		0000	Unk's Place	2134566	8/29/20	New	8/29/2024 3:14 PM		Liser Agency Name		
5		0000	Trumbull County C	Test	9/16/20	New	9/16/2024 3:21 PM		equals True	×	
									Date of the incident* greater or equal 11/01/2024 Add Filter	× Remove All	

**Note:** If the user needs to add another Filter, click the Add Filter button and follow the steps above.

6. When completed adding Filters, click the **Save** button.

5 items Name	Incide All I s • Sorte • Updat	ent Reports <b>New Criti</b> ed by Incident I ed 7 minutes a	cal Incident Report	s 2 🔻 🖈	s, Record Type, Usi	er Agency	Q Search this list		New Assign Label	Change Status
		Inc ↑ ∨	Name of Provider $\lor$	Involve $\vee$	Date of ∨	St ∨	Created Date $\lor$		Cancel	Save
1		0000	Lighthouse Youth S	1234567	7/22/20	New	7/23/2024 12:14 P		Curreer	Save
2		0000	Lighthouse Youth S	1234567	7/22/20	New	7/23/2024 12:15 P	•	Status	×
		0000	Unk's Place	123455	8/29/20	New	8/29/2024 3:12 PM	•	equals New	
		0000	Unk's Place	2134566	8/29/20	New	8/29/2024 3:14 PM	•		
		0000	Trumbull County C	Test	9/16/20	New	9/16/2024 3:21 PM		User Agency Name equals True	×
									Date of the incident* greater or equal 11/01/2024	×



## Filtering By Agency

- 1. Click the **Add Filter** button.
- 2. Select **Name of Provider Agency** from the dropdown menu.
- 3. Select **Starts With** from the Operator dropdown menu.
- 4. Provide the **Value**. Type the start of one of your agency names.
- 5. Click the **Done** button.
- 6. Click the **Save** button to display the Provider Agency within the Time Frame filtered.

5 items Name	Incide All I • Sorte Updat	ent Reports <b>New Criti</b> ed by Incident I ed 13 minutes	<b>cal Incident Report</b> Number • Filtered by All incide ago	s 2 ▼	Status, Record T	ype, U	ser Agency	(	Q Searc	h this list		New     Assign Label     Chi       ☆ ▼     Ⅲ ▼     C <sup>1</sup>	ange Status
		Inc ↑ ∨	Name of Provider $\vee$	Involve.	∨ Date of	~	St ~	Creat	ted Date	~		User Agency Name	
1		0000	Lighthouse Youth S	123456	ris la							equals True	~
2		0000	Lighthouse Youth S	123456	Name of Pre	wider	Agency				all.		
3		0000	Unk's Place	123455		JVIGET	Agency			*		Date of the incident*	×
4		0000	Unk's Place	213456	Operator							greater or equal 11/01/2024	
5		0000	Trumbull County C	Test	starts with					•	95	New Filter*	×
					Value							Add Filter Re	move All
										Done		Add Filter Logic	Ŧ

**Note:** If the user does not want the timeframe and only needs the Provider Agency Filter, the user can click the "X" in the corner of the Filters for the Timeframe Filters and only leave the filter for the "Name of Provider Agency."

**Important:** There are many other Filter options available. To Add any additional Filter, use the steps outlined above.

#### **Editing the Fields Displayed**

- 1. Click the List View Controls gear button.
- 2. Select, Select Fields to Display from the dropdown menu.

5 item Name	Incide <b>All I</b> s • Sorte • Updat	ent Reports <b>New Critical Ir</b> ed by Incident Numbe ed 27 minutes ago	r • Filtered by All incident reports - Status, Record Type, I	Jser Agency	<b>Q</b> Search this list	New As	sign Label Change St	tatus
		Incident $\uparrow{\smallsetminus}$	Name of Provider Agency 🗸 🗸	Involved Chil 🗸	Date of the in	LIST VIEW CONTROLS	ted Date 🗸 🗸	
1		000001	Lighthouse Youth Services, Inc.	1234567	7/22/2024	New	2024 12:14 PM	•
2		000002	Lighthouse Youth Services, Inc.	1234567	7/22/2024	Clone	2024 12:15 PM	•
3		000003	Unk's Place	12345567	8/29/2024	Rename	2024 3:12 PM	•
4		000004	Unk's Place	2134566	8/29/2024	Sharing Settings	2024 3:14 PM	•
5		000005	Trumbull County Children Services Board	Test	9/16/2024	Calast Fields to Display	2024 3:21 PM	•
						select fields to Display	J	
						Delete		
						Reset Column Widths		



- 3. To Add a new Field to your Visible Fields, make a selection from the **Available Fields** box.
- 4. Click the **Arrow** pointing to the Visible Fields box.

Select Fields to Display									
wailable Fields	Visible Fields								
Child maltreatment referral t	Incident Number								
Created By	Name of Provider Agency								
Created By Alias	Involved Child's Ohio SACWIS ID?								
Describe the incident that oc	Date of the incident								
Email address(es) for custodi	Status								
Last Activity Date	Created Date								

The Field will now display in the Visible Fields.



- 5. To change the ordering of the Visible Fields, select the **Field** you want to move.
- 6. Click the Up and/or Down Arrows to move the Field to the desired order.



Select Fields to Display									
Available Fields Visible Fields									
Child maltreatment referral t		•	Name of Provider Agency						
Created By		•	Involved Child's Ohio SACWI						
Created By Alias			Date of the incident						
Describe the incident that oc			Status						
Email address(es) for custodi			Created Date						
Last Modified By	-		Last Activity Date						

#### The Field has been moved.

Available Fields										
Child maltreatment referral t Created By		ľ	Name of Provider Agency Involved Child's Ohio SACWI	-						
Created By Alias			Date of the incident							
Describe the incident that oc			Status							
Last Modified By			Last Activity Date Created Date							

- 7. To remove a Visible Field, select the appropriate **Field** from the box.
- 8. Click the **Arrow** pointing toward the Available Fields box.



Select Fields to Display									
Available Fields Child maltreatment referral t Created By Created By Alias Describe the incident that oc Email address(es) for custodi Last Modified By		Visible Fields Incident Number Name of Provider Agency Involved Child's Ohio SACWI Date of the incident Status Last Activity Date							
Cancel Save									

The Field will no longer be in the Visible Fields and has been moved to the Available Fields box.

9. When completed, click the **Save** button.

Available Fi	elds			Visible Fields	)
Created	Ву			Name of Provider Agency	•
Created	By Alias			Involved Child's Ohio SACWIS ID?	_
Describe	the incident that oc		•	Date of the incident	•
Email ad	dress(es) for custodi			Status	
Incident	Number			Last Activity Date	
Last Mod	dified By			Created Date	
Last Mod	dified Rv Alias	•			J

The Incident Reports screen displays.



### **Pin List View**

- 1. To **Pin** a different list view, click the **List View** dropdown menu.
- 2. Select the List View you want to pin.
- 3. Click the **Pin** button.

• • • • • • • • •	Ohio Certification f	Home	~	$\Box$ All New Critical Incid $\lor$ $\times$						
F	Incident Reports All New Critical Incider	nt Reports 2 🔻		IN CHENNEL COMPANY	DES CHIEN		New	Assig	gn Label	Change Status
5 items Name	LIST VIEWS				earch this list			\$ <b>*</b>	🔟 • 🛛 🖓	
	All				ate of the in $\vee$	Status	$\sim$	Create	ed Date	~
1	All Critical Incident Reports	S			22/2024	New		7/23/2	2024 12:14 PI	V V
2	All New Critical Incident Re	eports			22/2024	New		7/23/2	024 12:15 PI	V V
3	✓ All New Critical Incident Re	eports 2			29/2024	New		8/29/2	2024 3:12 PM	<b>v</b>
4	All Reviewed Critical Incide	ent Reports			29/2024	New		8/29/2	2024 3:14 PM	
5	Recently Viewed (Pinned lis	t)			16/2024	New		9/16/2	2024 3:21 PM	
	Testing Copy of List Views	-								

The List View is now listed as Pinned List.

Ohio	Department of Job & Family Services		Q Search						*• 🖩 🎕 ? 🌣 🐥 🐻
	Ohio Certification f	Home		$\sim$	🖵 All New Critical Incid	~ ×			
	Incident Reports All New Critical Incident	Reports	; 2 <b>-</b>	(	7997 <i>07112</i> 311(17)3111	2)    (C	)}\$\$} <i>0111;5</i> \$		New         Assign Label         Change Status
5 items Name •	LIST VIEWS						arch this list		\$\$ • III • C' 🖍 & T
	All						ate of the in $\vee$	Status	s 🗸 Created Date 🗸
1	All Critical Incident Reports						22/2024	New	7/23/2024 12:14 PM
2	All New Critical Incident Repo	orts					22/2024	New	7/23/2024 12:15 PM
3	<ul> <li>All New Critical Incident Repo</li> </ul>	orts 2 (Pinned	d list)				29/2024	New	8/29/2024 3:12 PM
4	All Reviewed Critical Incident	Reports					29/2024	New	8/29/2024 3:14 PM
5	Recently Viewed						16/2024	New	9/16/2024 3:21 PM
	Testing Copy of List Views								

If you have additional questions pertaining to this Deployment Communication, please contact the <u>Customer Care Center</u>.

