Creating an Activity Log

Knowledge Base Article

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Creating an Activity Log

Overview

This article describes how to create an Activity Log using Ohio SACWIS functionality and features. It includes information on coding of logs to satisfy action items as well as answers to frequently asked questions.

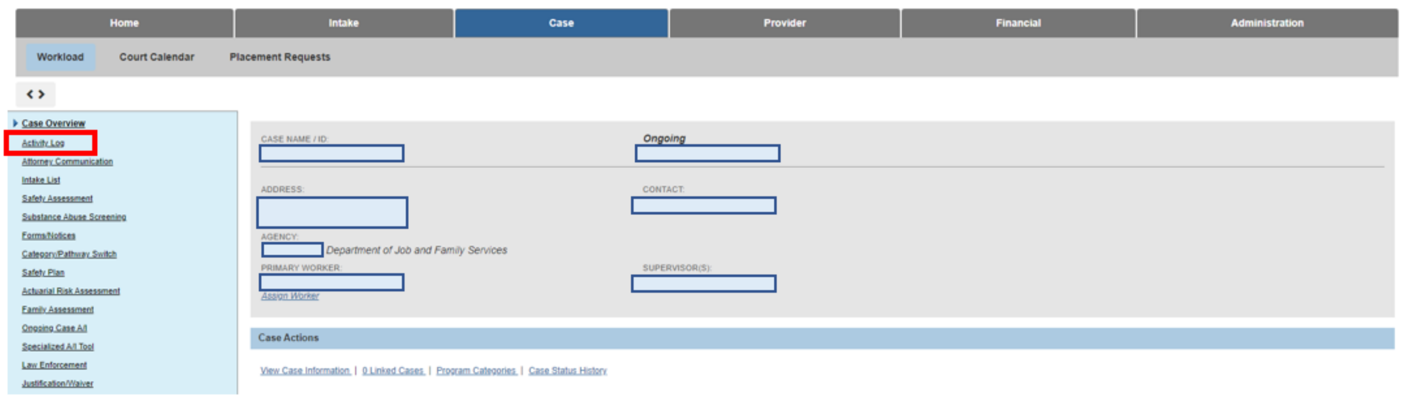
Navigating to the Activity Log Screen

From the Ohio SACWIS home page:

1. Click the **Case** tab.
2. Click the **Workload** tab.
3. Select the appropriate case link.

The **Case Overview** screen appears.

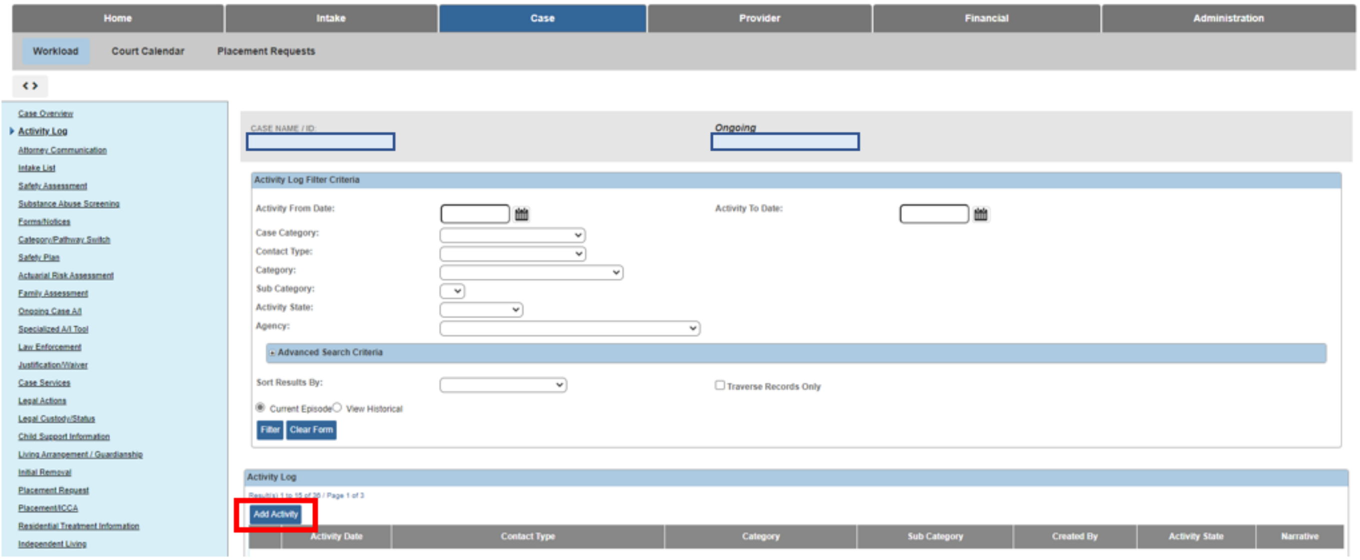
4. Click, **Activity Log**, in the navigation pane.



The **Activity Log** screen appears.

5. Click, **Add Activity**.

Creating an Activity Log



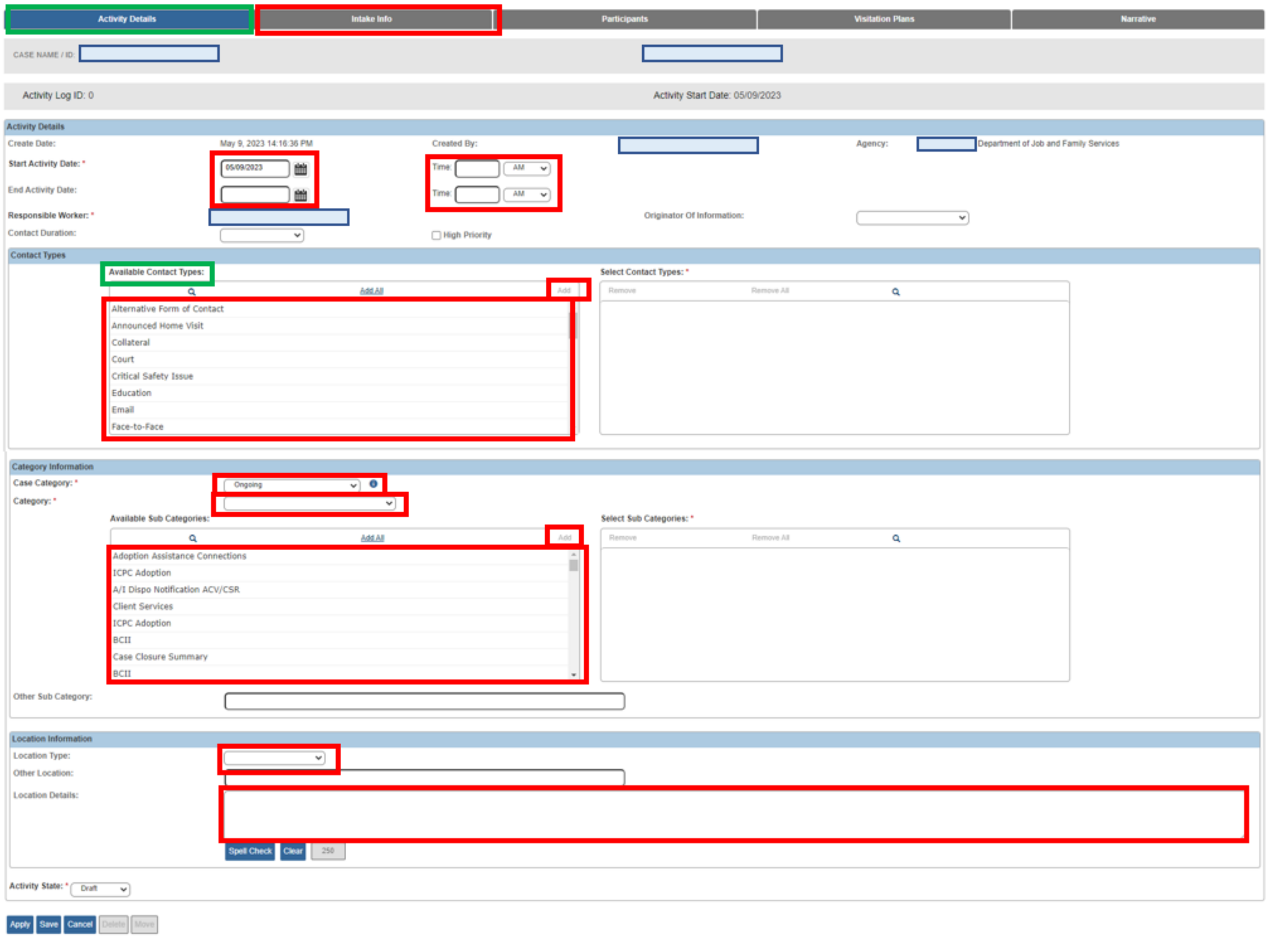
The **Activity Details** tab screen appears.

Adding an Activity Log

1. Enter the **Start Activity Date** and **Time**.
2. Enter the **End Activity Date** and **Time**.
3. Make a selection from the **Available Contact Types** list (this will activate the **Add** button).
4. Click, **Add** to move the selection to the **Select Contact Types** grid.
5. Make a selection from the **Case Category** drop-down menu.
6. Make a selection from the **Category** drop-down menu.
7. Make a selection from the **Available Sub Categories** list (at least one sub category is required).
8. In the **Location Information** grid, make a selection from the **Location Type** drop-down menu.
9. Enter **Location Details**.
10. Click the **Intake Info** tab.

    Note: Ohio SACWIS will automatically save your changes.

Creating an Activity Log

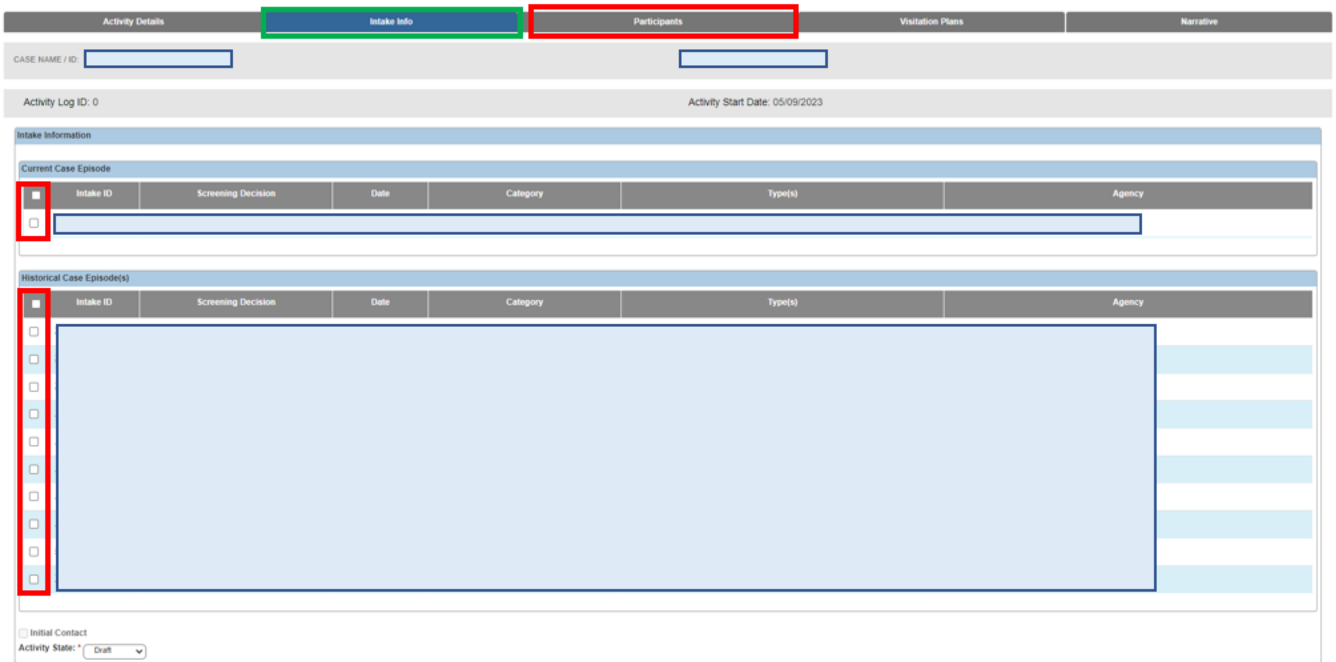


The **Intake Info** tab screen appears.

Completing the Intake Info Tab

1. Place a checkmark(s) in the check box(es) beside the relevant **Current Case Episode** or **Historical Case Episode**.
2. Click the **Participants** tab.

Creating an Activity Log



The **Participants** tab screen appears.

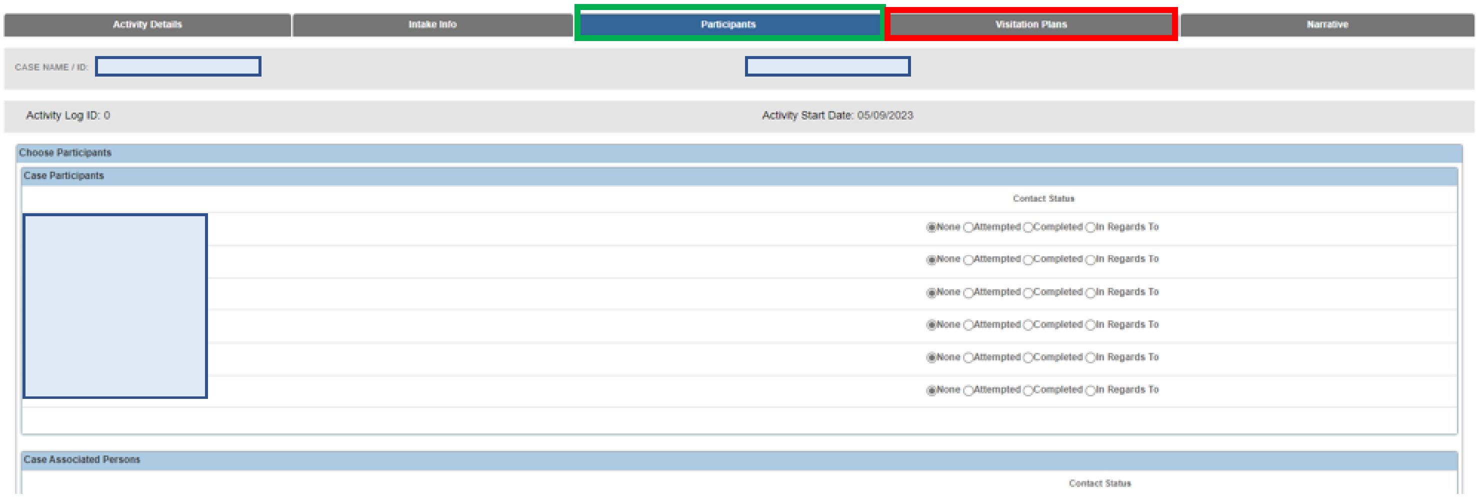
Completing the Participants Tab

1. Click the appropriate radio buttons for the applicable participant(s) to record the **Contact Status**.

Important:

- Case participants are active case members based on the activity log dates.
- Case associated persons are all associated persons in a case as of the activity log date.
- For assessment/investigation, the intake participant(s) will be displayed in the **Intake Participants** section (not shown here) based on the intake selected on the previous tab.
- You will always have case participants or intake participants.
- If there are associated persons on the case, they will display on this screen.
- If the child(ren) are in placement, the placement providers will display.

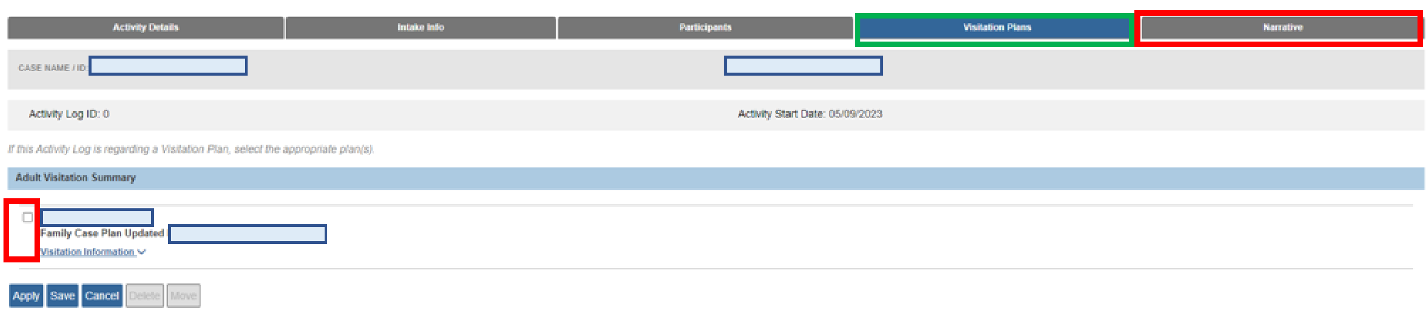
2. When complete click the **Visitation Plans** tab.



The **Visitation Plans** tab appears.

Completing the Visitation Plans Tab

1. If applicable, click the checkbox to associate a Visitation Plan.
2. When complete, click the **Narrative** tab.

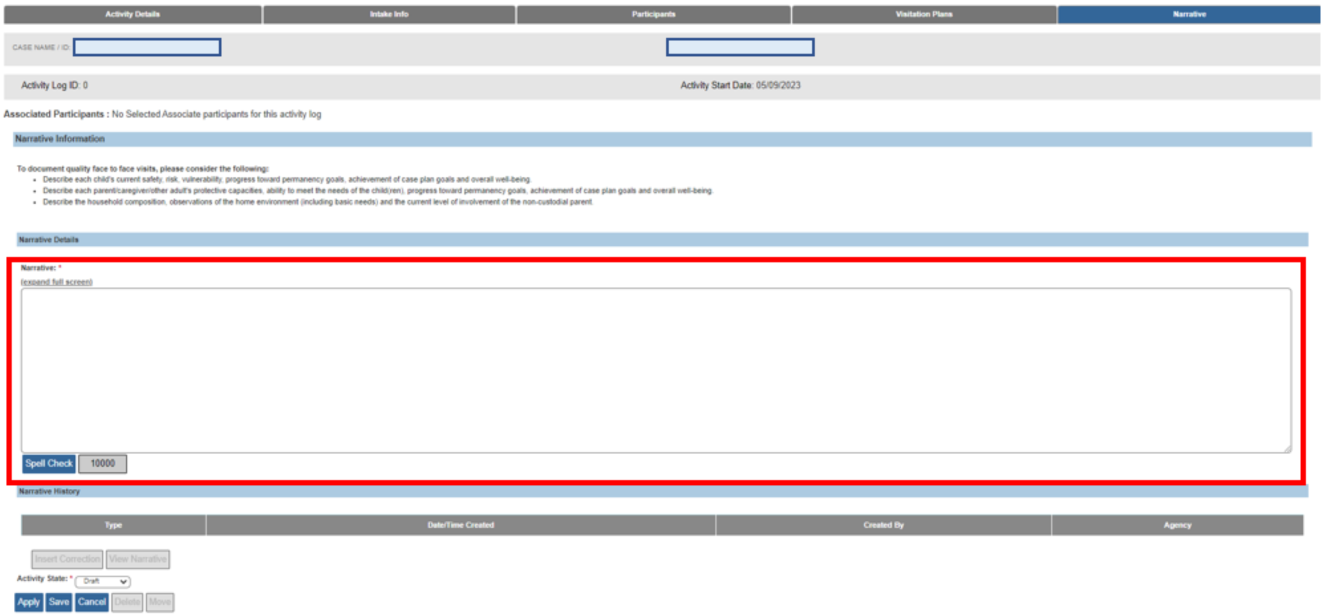


The **Narrative** tab screen appears.

Completing the Narrative Tab

1. In the **Narrative** field, enter content about the activity.

Creating an Activity Log

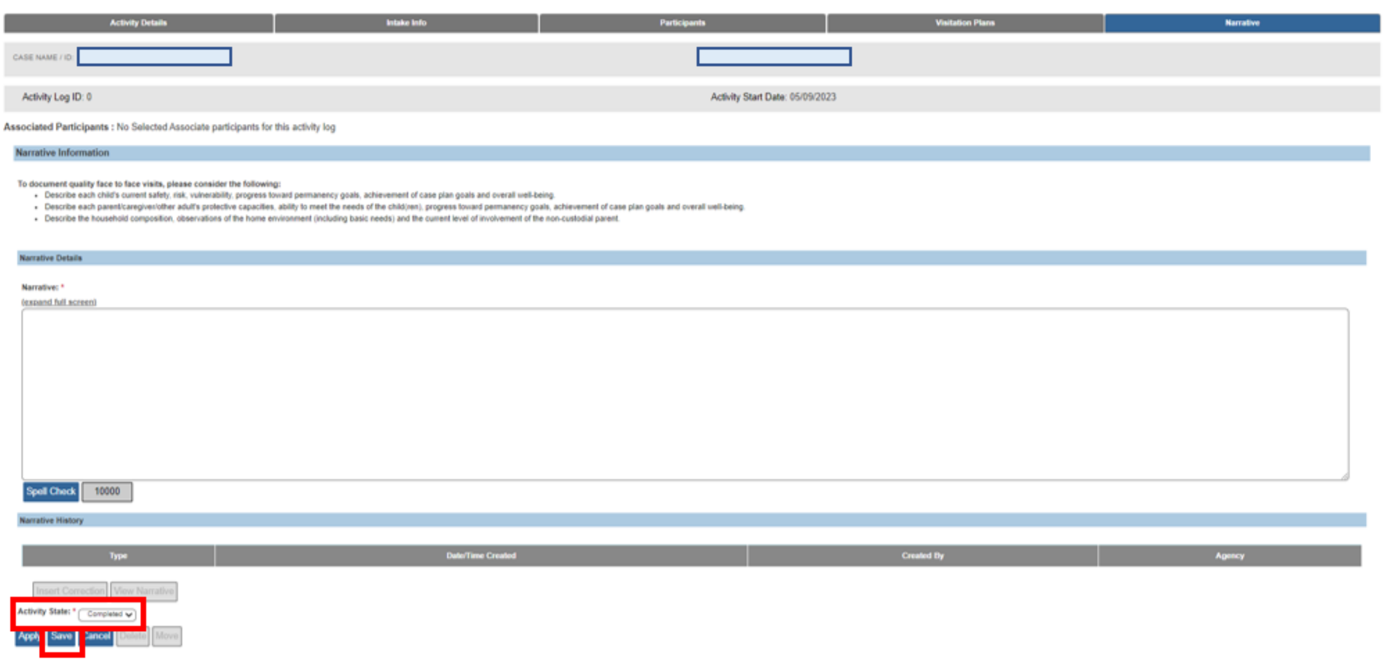


Marking an Activity Log as Complete

1. When all of the information has been entered, select **Completed** from the **Activity State** drop-down.

   Note: Ohio SACWIS will maintain a status of Draft until Completed is selected.

2. Click, **Save**.



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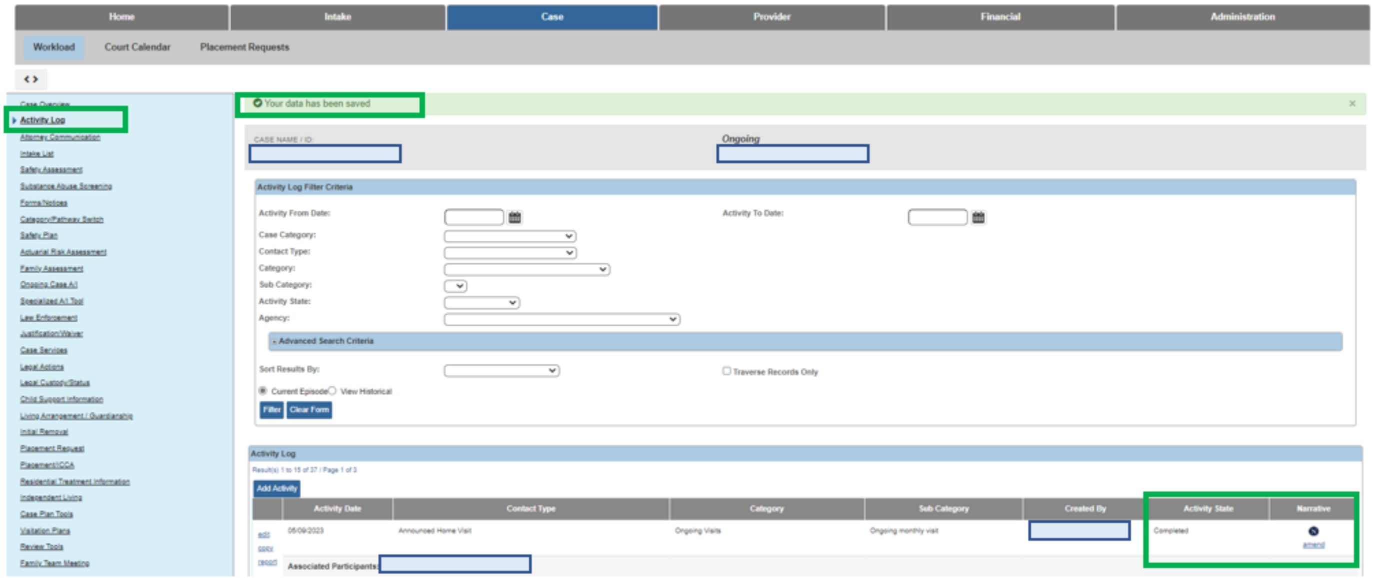
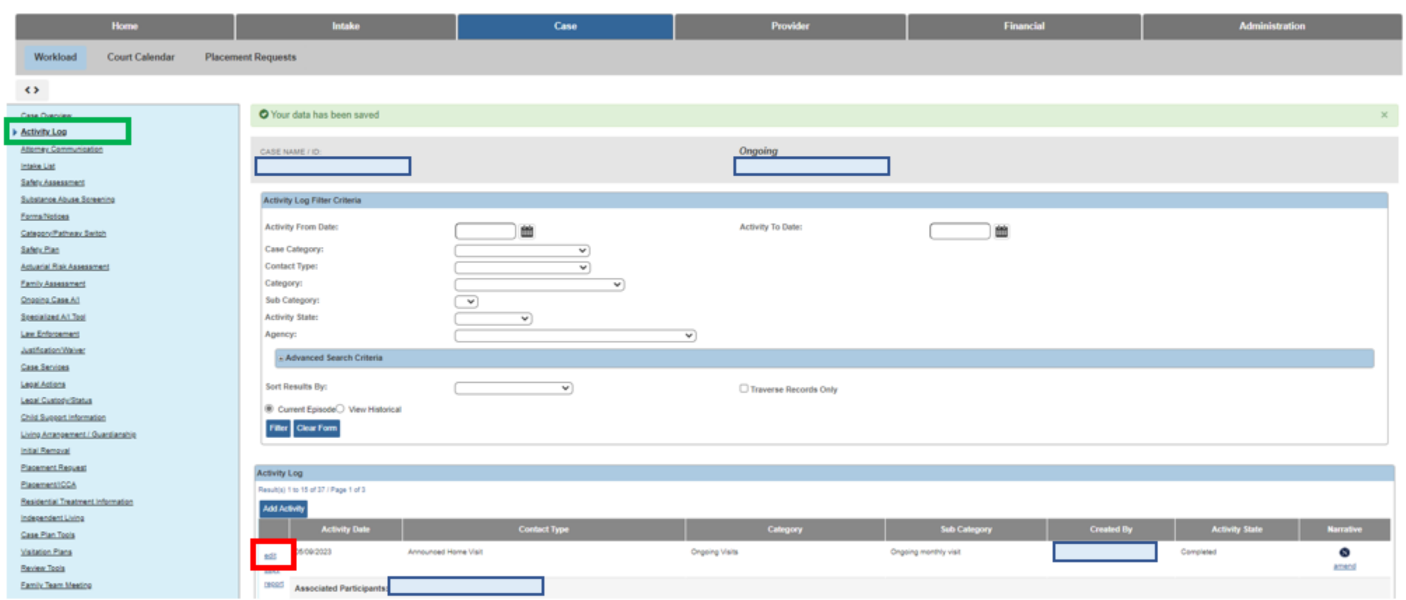
The **Activity Log** screen appears displaying **Completed** in the grid row.



Editing an Activity Log

1. Navigate to the **Activity Log** screen using steps previously discussed.
2. Click the **edit** link in the appropriate grid row.



The **Activity Details** tab screen appears

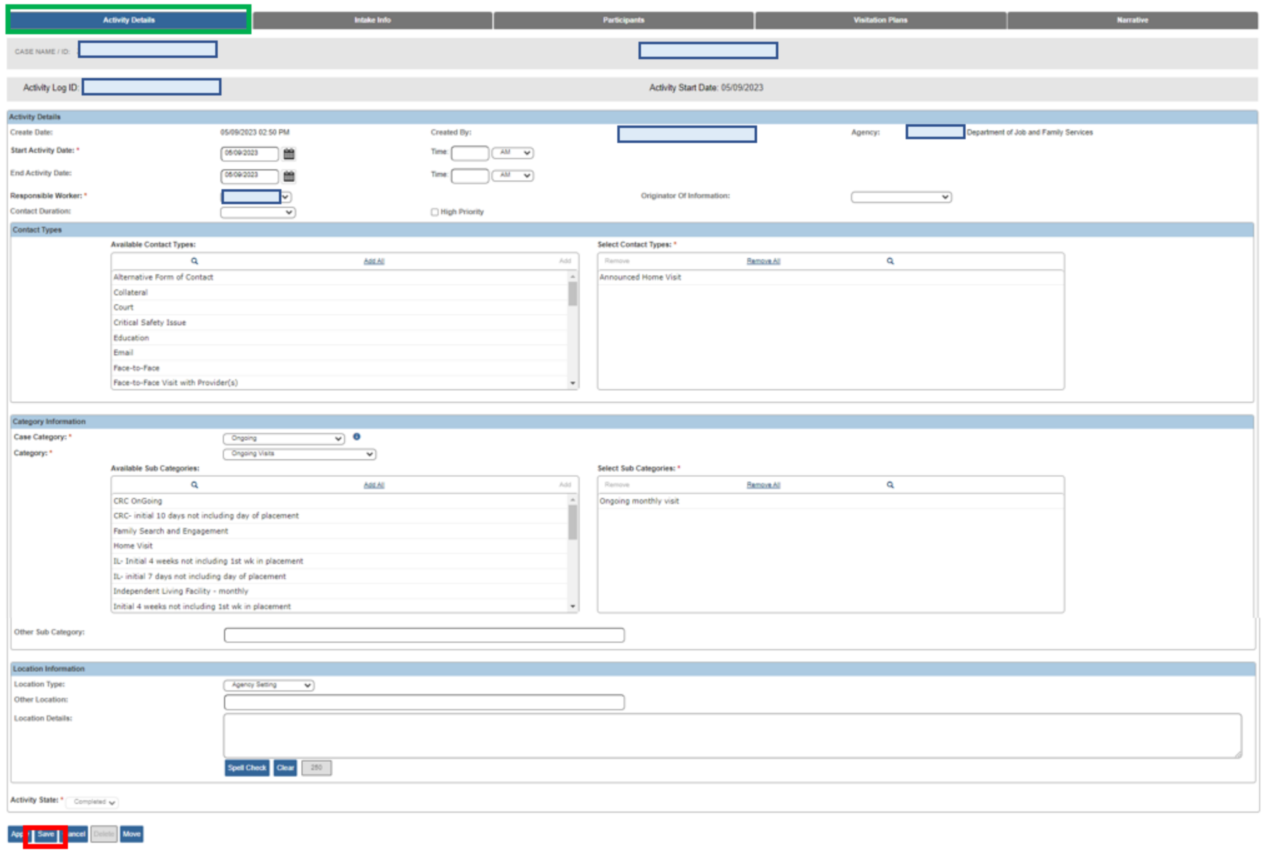
Important:

- All fields can be edited on an activity log, except narrative content can only be amended on completed activity logs.
- Activity logs linked to an approved or pending approval work item (Safety Assessment, Specialized Assessment, Case Transfer and Case Closure) cannot be edited.
- Activity logs linked to Visitation Plans cannot be edited unless the activity log is unlinked from the Visitation Plan.
- For adoption cases where any child is an associated participant to an activity log and that child's record has been sealed / secured, the system will not allow edits to the activity log.

The following people have the ability to edit activity logs:

  - Workers who created the activity log,
  - The created worker's supervisor,
  - Workers currently assigned to the case, and any currently assigned worker's supervisor.
  - For closed cases, workers who created the activity log and all supervisors for the agency have the ability to edit activity logs.

3. Once you have finished any edits, click, **Save**.



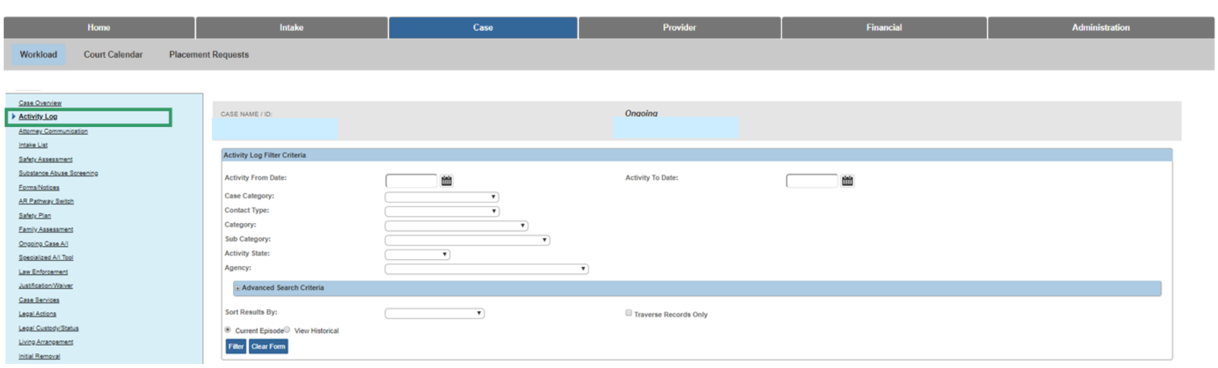
The **Activity Log** screen appears.

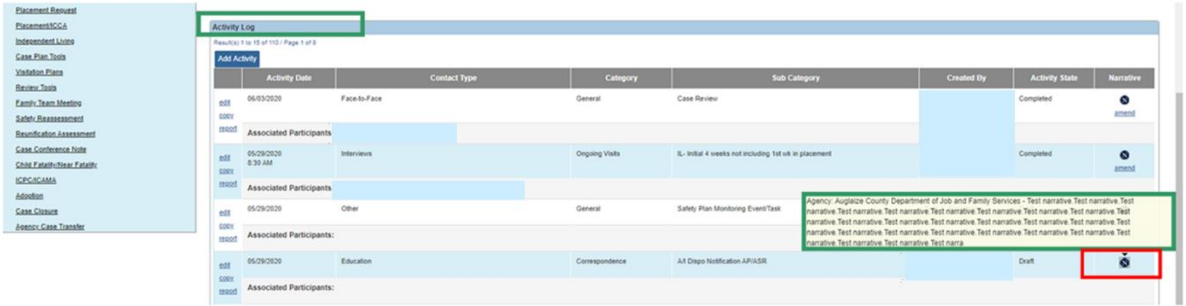
Viewing a Narrative

1. In the **Activity Log** grid, hover your cursor over the icon in the appropriate grid row.

   The system displays the first 400 characters of the narrative for that activity log.

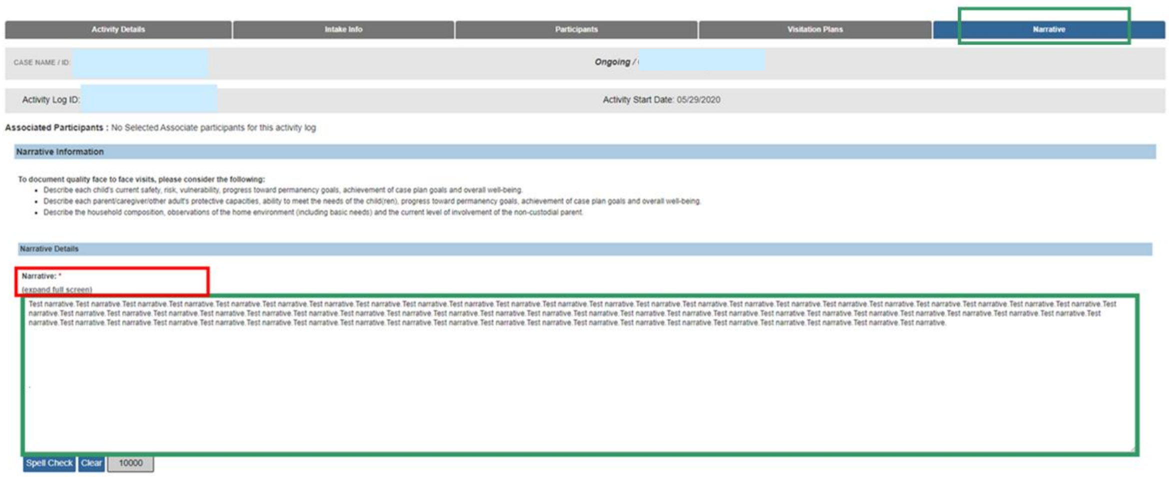
2. If you wish to view the full narrative on the Narrative tab screen, click the icon in the relevant grid row.





The **Narrative** tab screen appears, displaying the narrative in the **Narrative Details** grid.

Note: If the narrative is lengthy, you can click **(expand full screen)** to view additional text.



The **Narrative** screen expands to show the complete narrative.

1. When complete, click **exit full screen**.

Scrolling Through Activity Logs

By default, Ohio SACWIS filters the **Activity Log** grid records by date. If other search criteria are selected, Ohio SACWIS filters accordingly and the grid results appear in that order.

Depending on how the **Activity Log** grid is filtered and which grid record is clicked, Ohio SACWIS allows you to scroll through all of the activity logs using the **Previous Activity Log** and **Next Activity Log** buttons. However, what you see is based on where you are in the system.

For example, if you click the **N** icon, the **Narrative Information** screen appears. As you scroll using the **Next Activity Log** button, the system stays on each activity log's **Narrative Information** screen. However, if you click the **Edit** link, the system stays on each activity log's **Activity Details** screen as you scroll.

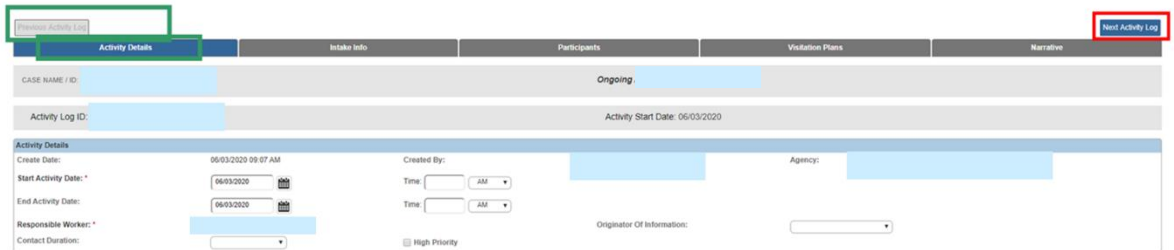
To use the **Previous Activity Log** and **Next Activity Log** buttons, complete the following steps:

Creating an Activity Log

1. Navigate to the **Activity Log** screen.
2. Click the **edit** link in the relevant grid row.

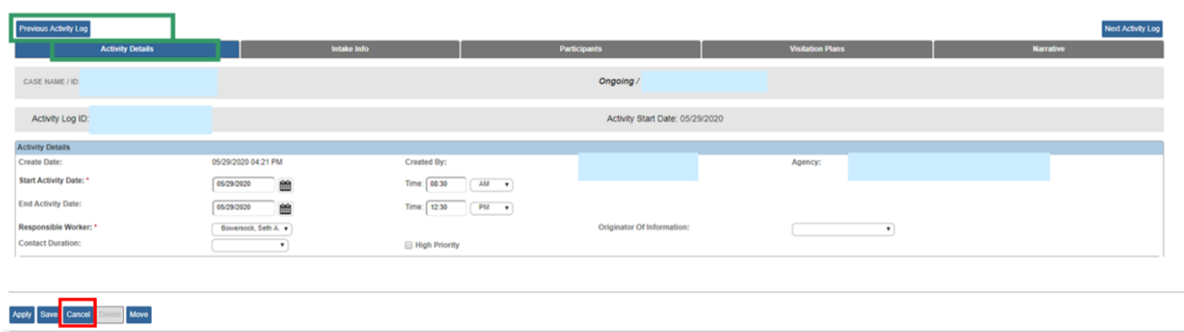
The **Activity Details** screen appears. Because this was the first record in the grid, the **Previous Activity Log** button is disabled (grayed out) but the **Next Activity Log** button is enabled. If you had clicked the second (or a later) row in the grid, both buttons would be enabled.

3. Click the **Next Activity Log** button.



The **Activity Details** tab page **for the next activity log** that appeared in the grid displays. The **Previous Activity Log** button is now enabled.

4. Continue scrolling through the activity logs as needed.
5. When complete, click the **Cancel**.



The **Activity Log** screen appears.

Amending an Activity Log

1. Click the **amend** link in the appropriate grid row.

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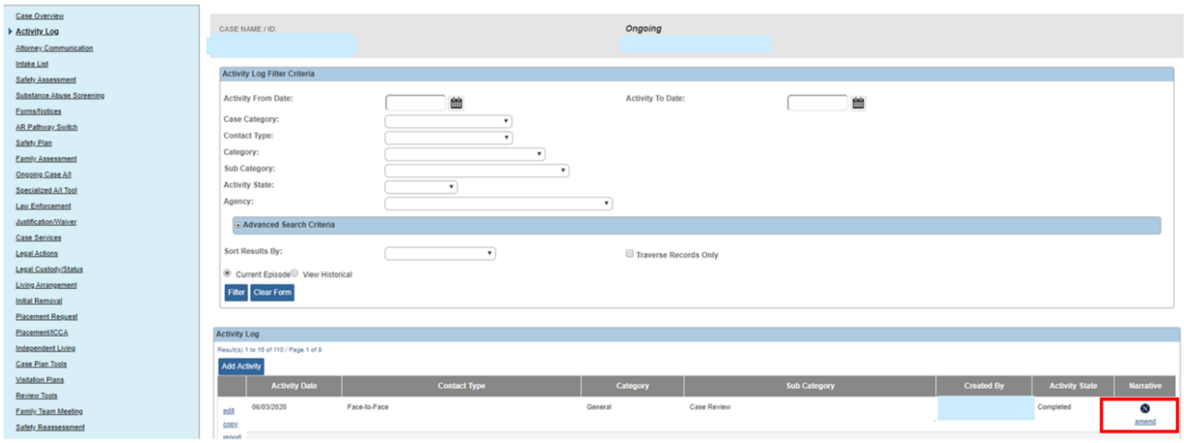
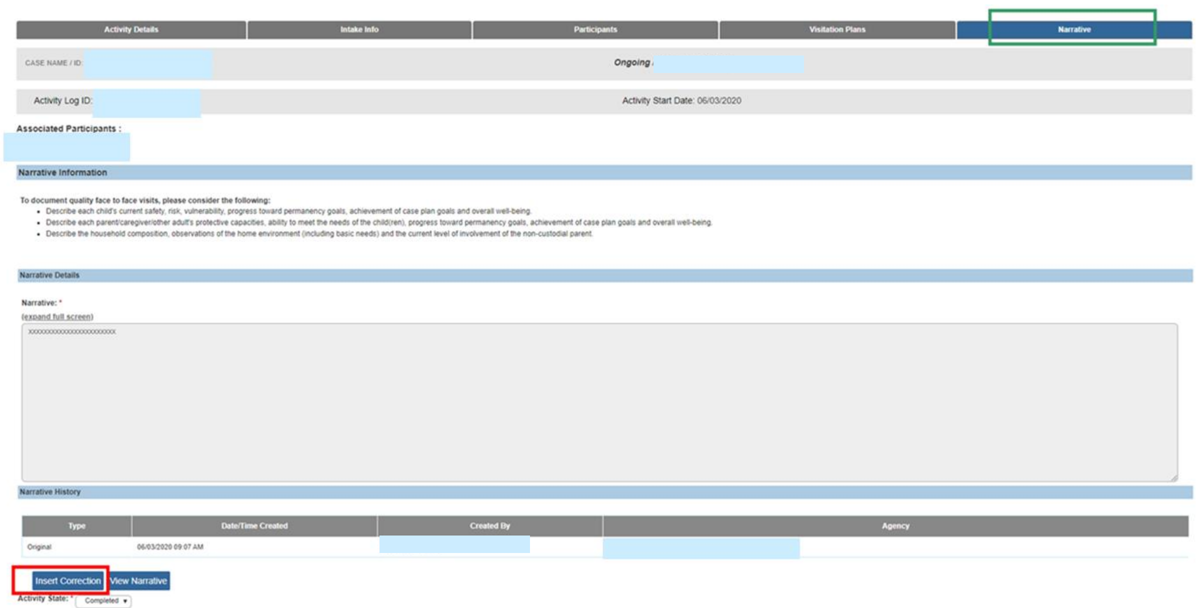


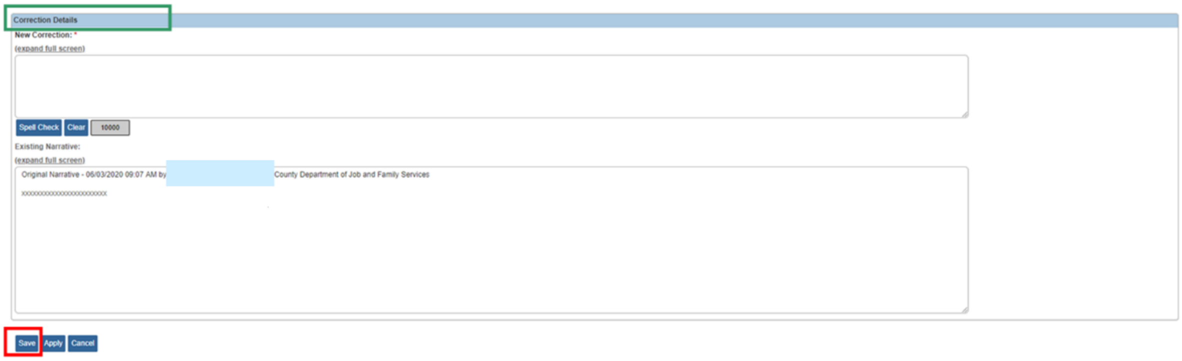
The **Narrative** tab screen appears.

2. Click the **Insert Correction** button.

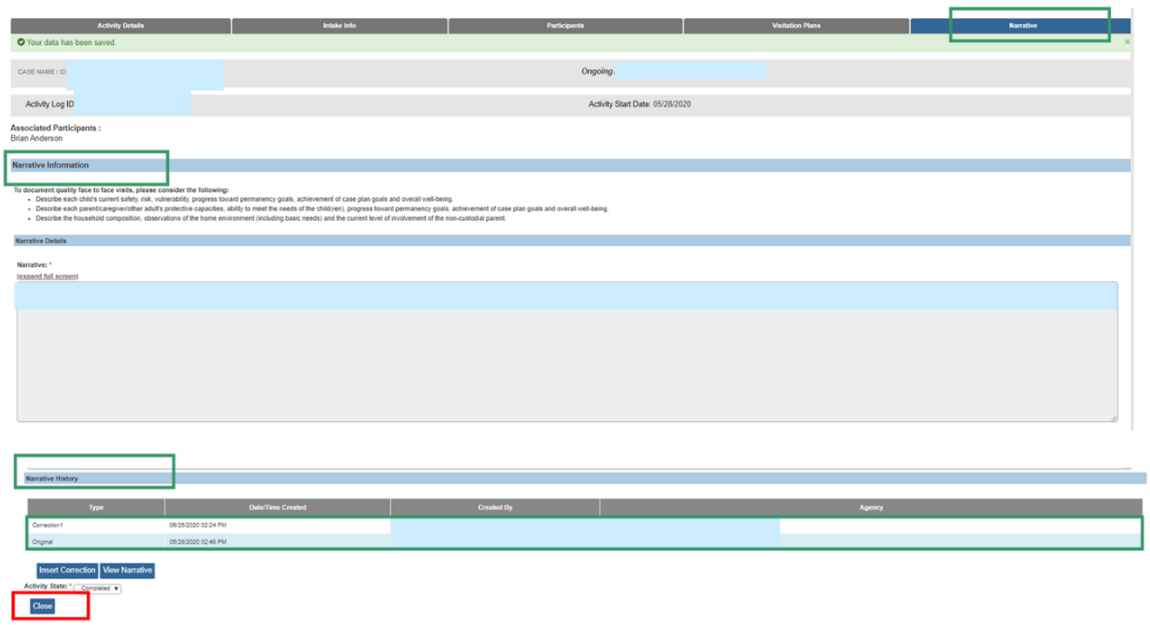


The **Correction Details** screen appears.

3. In the **Correction Details** grid, enter the correction content.
4. Click the **Save** button.



The **Narrative** tab screen appears, displaying the original content and the correction(s) you made in the **Narrative History** grid.



As shown in the example below, if a correction 2 is added, the original content and correction 1 both appear in the Narrative History grid.

5. When finished, click, **Close.**

Moving an Activity Log

Activity logs can be moved from one case to another, but to move an activity log, you will need to have the **Activity Log Mover** user group.

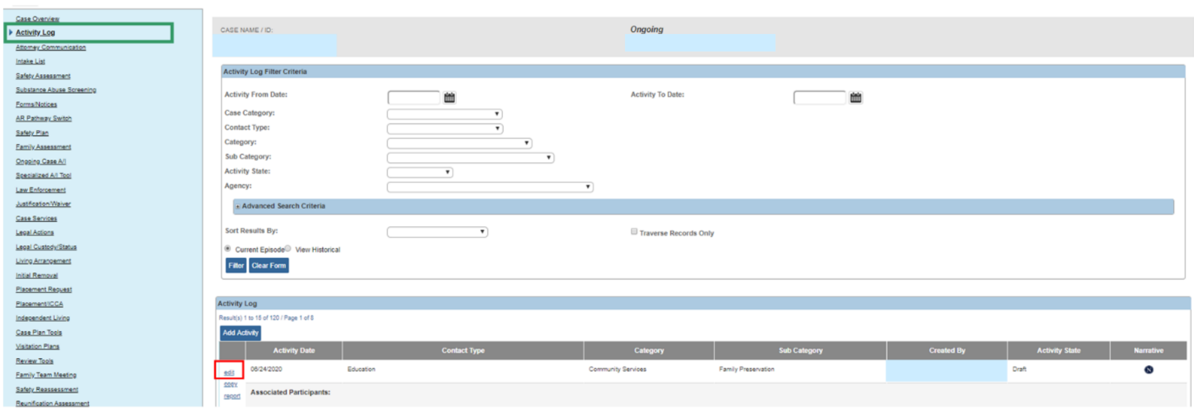
Important Information about Moving Activity Logs:

- Activity logs linked to an approved or pending approval work item (Safety Assessment, Specialized Assessment, Case Transfer and Case Closure) cannot be moved.
- Activity logs linked to Visitation Plans cannot be moved unless the activity log is unlinked from the Visitation Plan. If you try to move a linked one, the following error

message appears: Activity log is linked to a Visitation Plan, please review and unlink before moving this activity log.

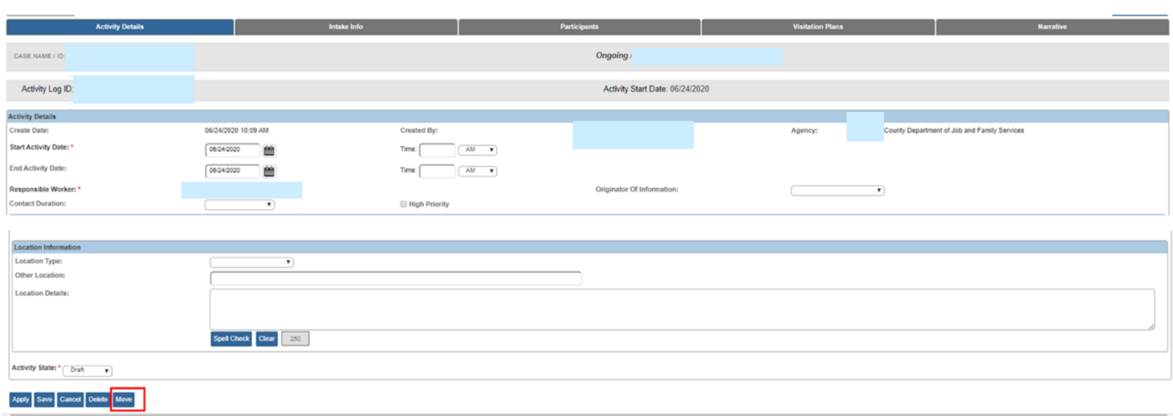
- If the activity log status is **Completed** with a category of **Assessment / Investigation Mandate** and a subcategory of **Assessment / Investigation Initiated**, the system will prevent the move.
- If the activity log was copied from a provider activity log to a case activity log, the system will prevent the move.
- If the activity log is associated with a child that has been sealed / secured, the system will prevent the move.

1. Navigate to the **Activity Log** screen.
2. Click, **edit** link in the appropriate grid row.



The **Activity Details** tab screen appears.

3. At the bottom of the screen, click the **Move** button.



The **Search For Case** screen appears.

4. Enter search criteria.
5. Click the **Search** button.

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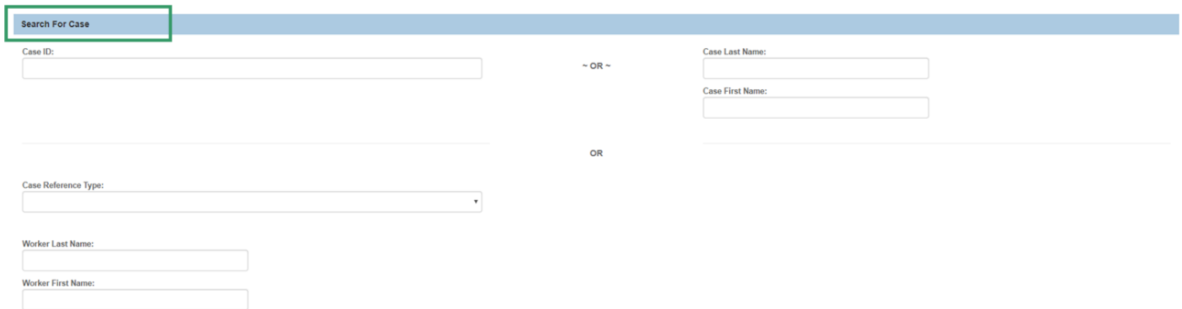
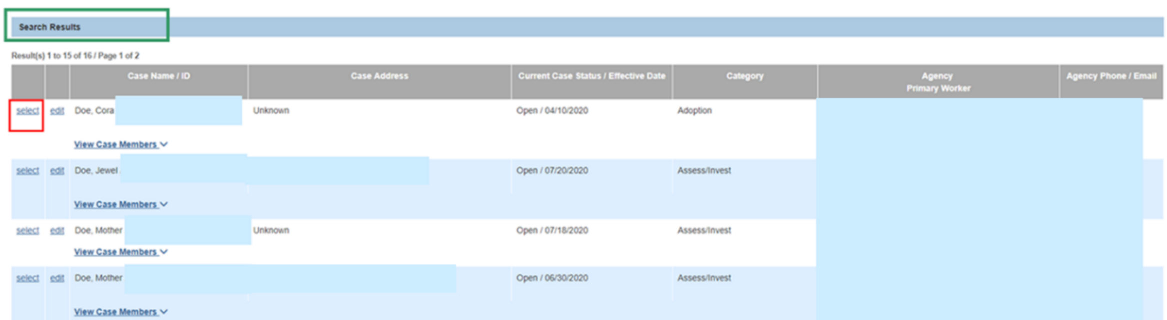


The results appear in the **Case Search Results** section.

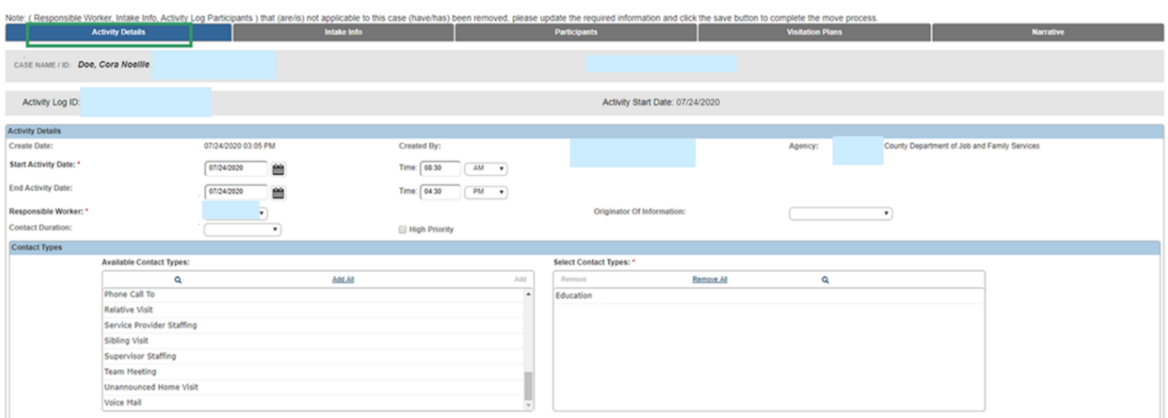
6. Click the **Select** link.



The **Activity Details** screen appears.

Important: The system automatically removes any activity log information that is no longer applicable. You will then need to enter the missing information based on the case that the activity log is being move to.

1. Enter missing information into fields as needed.
2. Click, **Save**.



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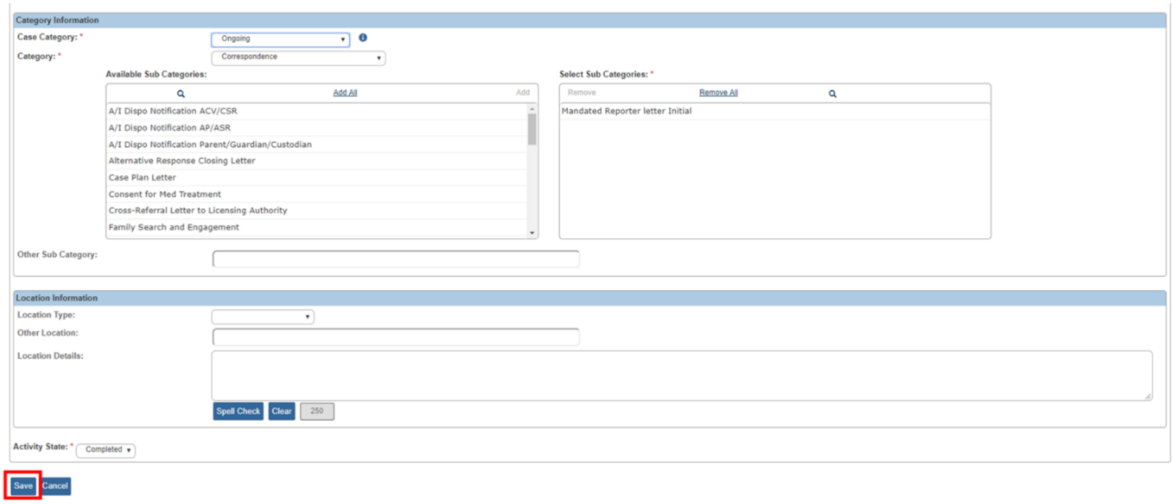
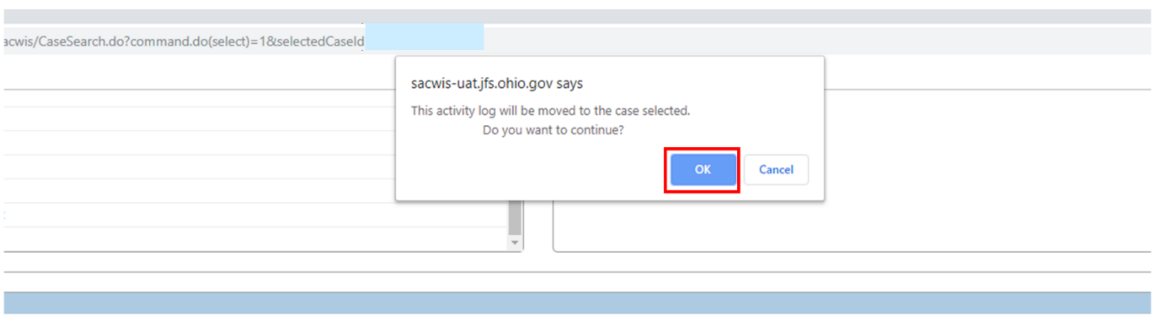
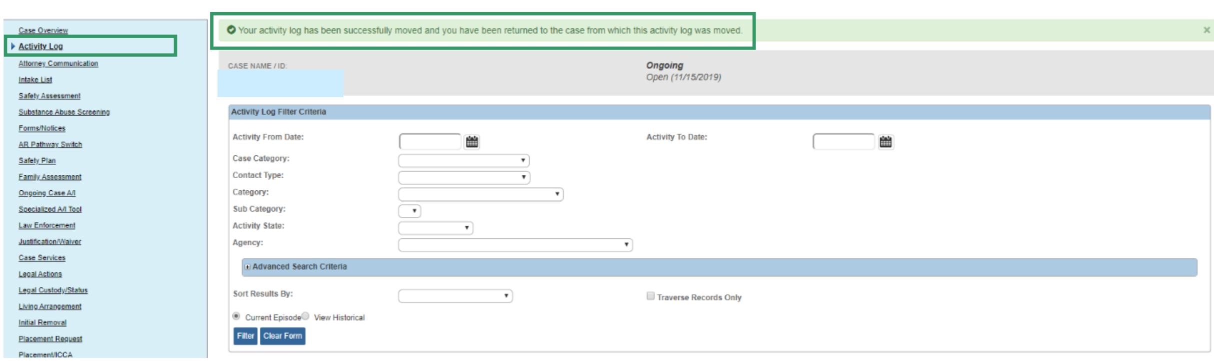


The following message appears:

3. Click the **OK** button.



The **Activity Log** screen appears, displaying the following message: **Your activity log has been successfully moved and you have been returned to the case from which this activity log was moved.** The system returns to the case you were in, not the case where the activity log was moved.



Satisfying Requirements for an Ongoing Monthly Visit

Complete the following steps to enter an activity log for a monthly visit with a child in agency custody who is placed in substitute care:

Completing the Activity Details Screen

1. In the **Start Activity Date** field, verify that the date is correct or change it.
2. If needed, enter the appropriate time in the **Start Time** field.
    - The **Start Time** field is not required, but entering the time improves sorting capabilities, compliance monitoring, and reporting detail information.
    - If you enter a start time, you must enter an end time to save the record.
3. In the **Responsible Worker** field, select the appropriate name.
4. In the **Available Contact Types** field, select **Face-to-Face**.
5. Click the **Add >** button to move the type to the **Selected Contact Types** field.
6. In the **Category** field, select **Ongoing Visits**.
7. In the **Case Category** field, select the appropriate case category.
8. In the **Available Sub Category** field, select **Ongoing Monthly Visit**. See the next page for additional information about this field.
9. In the **Location Type** field, select **Placement Setting**.
10. Click the **Participants** tab at the top of the screen.

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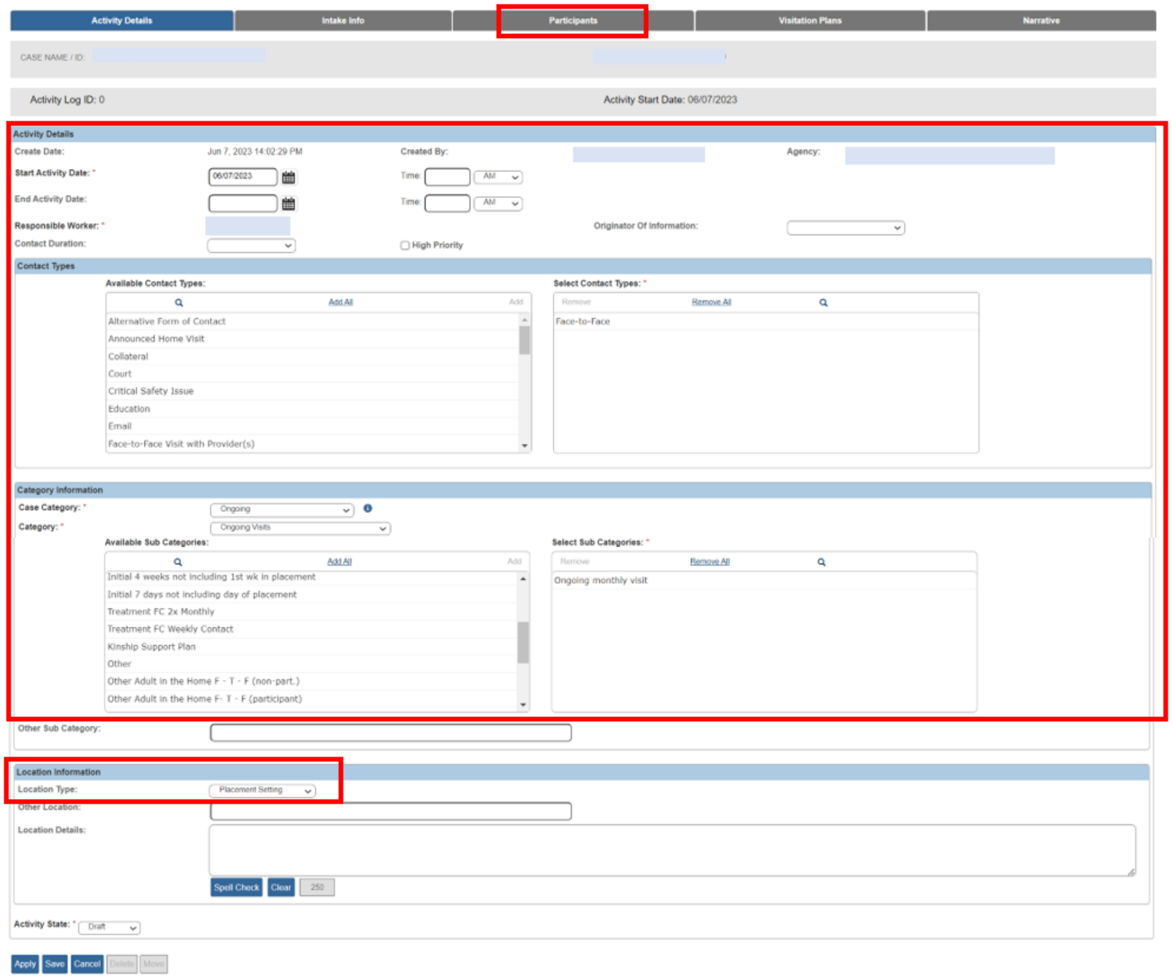


The **Associate Participants** screen appears.

Important Information about the Sub Category Field

Based on the circumstances of your visit, your **Sub Category** field selection may be different than the one shown in the screen shot. For example:

- If you are visiting a child in a CRC, choose **CRC Ongoing**.
- If you are visiting a child in the first seven days of placement, select **Initial 7 days not including day of placement**.

Also, the ticklers that appear on the **Case Overview** screen can assist you in choosing the appropriate sub-category.

Creating an Activity Log

Refer to the **Tips: Activity Log Tickler Tip Sheet** in the Knowledge Base for guidance on the specific contact **Type**, **Case Category**, **Category**, and **Sub Category** selections required to dispose of each tickler.

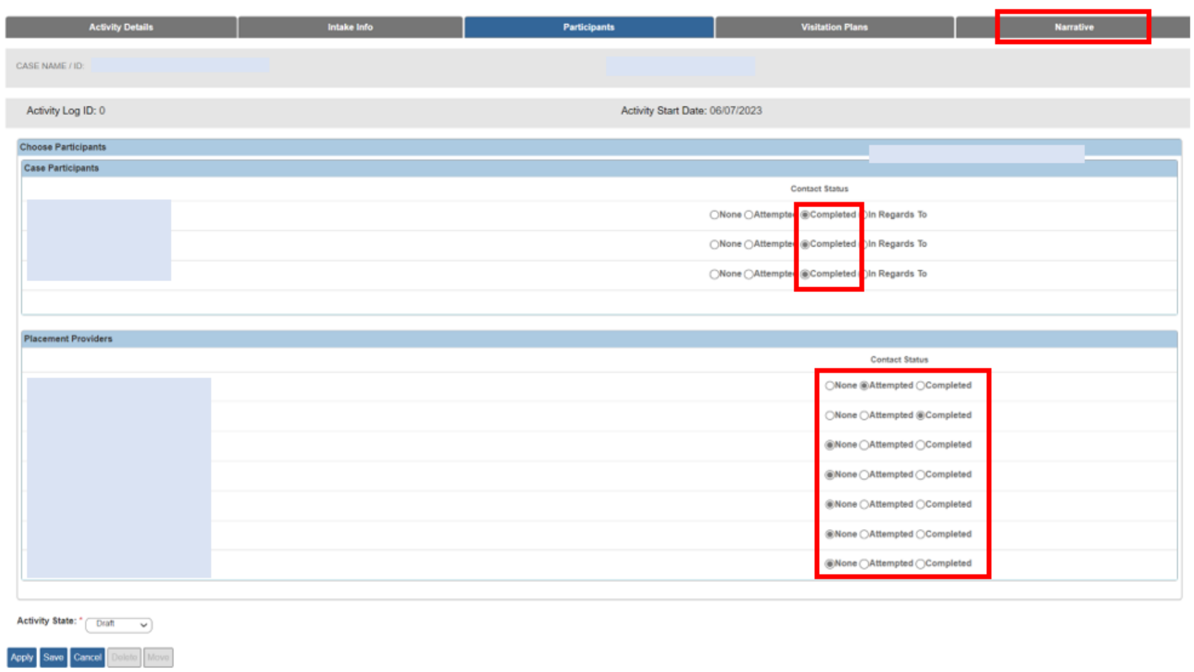
Completing the Participant Tab for an Ongoing Monthly Visit

1. In the **Case Participants** section, select the **Completed** radio button next to each case participant who was seen during the visit.
2. In the **Placement Providers** section, select the **Completed** radio button next to each placement provider who was seen during the visit.

Important:

- A contact status of **Attempted** will **not count** as a successful visit for reporting purposes.
- The contact status of **In Regards To** allows child participants to be documented when they are the subject of a telephone conversation, email, or other correspondence, but **not** seen face-to-face.

3. Click the **Narrative** tab.



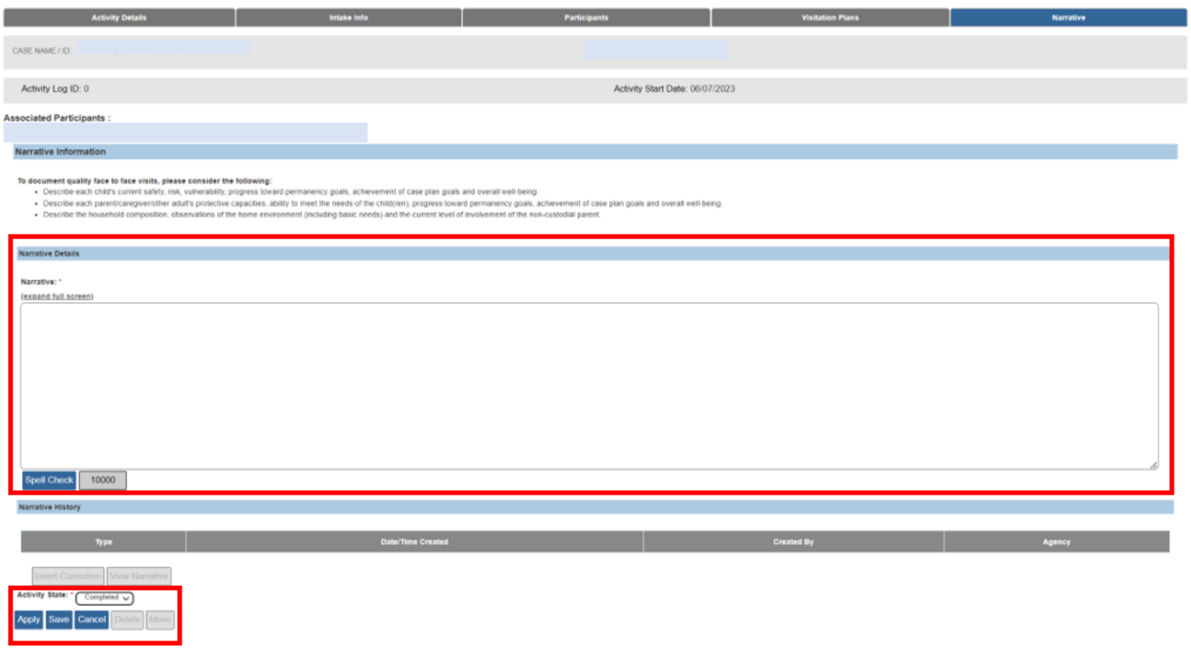
The **Narrative Information** screen appears.

Finalizing an Activity Log Record for an Ongoing Monthly Visit

1. In the **Narrative** field, enter details from the interview during the visit. Topics can include, but are not limited to:
   - Child safety

- Child well-being
- Progress toward meeting the case plan and permanency goal
- Appropriateness of the placement and services from the perspective of the child and substitute caregiver (as required in OAC 5101: 2-42-65)

2. In the **Activity State** field, follow your agency's procedures for setting the Activity Log to a **Completed** status.
   - Some agencies allow case workers to change the status; other agencies require that supervisors change the status.
   - For reporting purposes, activity logs are not considered complete until the record shows a **Completed** status.
3. When complete, click the **Save** button as the bottom of the screen.



The **Activity Log Filter Criteria** screen appears displaying a message that your data has been saved. This should satisfy any Action Item requesting an Ongoing Monthly Visit.

Creating Reports that Generate an Activity

When creating and saving the following reports, an activity log will be created within the case that the report was generated in:

- Help Me Grow Referral Letter
- Assessment/Investigation Disposition Letter-AP
- Assessment/Investigation Disposition Letter – Parent/Custodian

- Assessment/Investigation Disposition Letter – ACV/CSR
- Mandated Reporter Letter Initial
- Law Enforcement Notification
- Mandated Reporter Letter Disposition
- Cross Referral Letter to Licensing Authority
- Law Enforcement Request for Assistance
- Licensing/Supervising Authority Disposition Letter
- OHC Entity Administrator/Owner Disposition Letter
- Alternative Response Mandated Reporter Letter
- End of Assessment for Mandated Reporter Letter

Action Item Resolution

Action Items will appear if your corresponding Activity Logs:
- Are not completed by the required deadlines
- Categories are not correct
- Activity Logs are still in Draft status

Action Item Message	Contact Type Required	Case Category Required	Category Required	Sub-Category Required	Participant Required
Disposition Completed: Help Me Grow Staff Notification Required	Select method of how Help Me Grow was notified	Assessment /Investigation or Ongoing	Correspondence	Help Me Grow Referral	N/A
Dispositions Completed: Family/ACV Notification required	Select method of how Family /ACV were notified	Assessment /Investigation or Ongoing	Correspondence	A/I Dispo Notification (AP/ASR, ACV/CSR, Parent/ Guardian/ Custodian)	Applicable Participant
7-day contact must be made with child in placement	Face to Face	Assessment /Investigation or Ongoing or Adoption	Ongoing Visits	Initial 7 day not including day of placement	Child in Placement
4-week contact must be made	Face to Face	Assessment /Investigation	Ongoing visits	Initial 4 weeks not including	Child in Placement

with child in placement		or Ongoing or Adoption		first week in placement	
Monthly contact must be made with child in placement	Face to Face	Assessment /Investigation or Ongoing or Adoption	Ongoing visits	Ongoing monthly visit	Child in Placement
10-day CRC must be made	Face to Face	Assessment /Investigation or Ongoing or Adoption	Ongoing visits	CRC-Initial contact within 10 days-not including day of placement	Child in Placement
Monthly contact must be made with the child in CRC	Face to Face	Assessment /Investigation or Ongoing or Adoption	Ongoing visits	CRC-Ongoing	Child in placement
7-day contact must be made with child in independent living setting	Face to Face	Assessment /Investigation or Ongoing or Adoption	Ongoing visits	Independent living facility-face to face with child within 7 days following placement	Child in placement
Monthly contact must be made with child in independent living setting	Face to Face	Assessment /Investigation or Ongoing or Adoption	Ongoing visits	Independent living facility monthly visit	Child in placement

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Bi-weekly face to face must be made with child in intensive needs setting	Face to Face	Assessment /Investigation or Ongoing or Adoption	Ongoing visits	Intensive face to face bi-weekly	Child in placement
Weekly contact must be made for child in intensive needs setting	Face to Face Or Phone call To/From	Assessment /Investigation or Ongoing or Adoption	Ongoing visits	Intensive needs – weekly contact	Child in placement
24-hour face to face contact must be made with ACV/CSR	Face to Face	Assessment/ Investigation	Assessment/ Investigation Mandate	ACV Face to Face or Child Subject of Report	Applicable Child(ren)
72-hour face to face contact must be made with ACV/CSR	Face to Face	Assessment/ Investigation	Assessment/ Investigation Mandate	ACV face to face or Child Subject of Report	Applicable Child(ren)
Investigation Initiated	Face to Face or Phone Call	Assessment /Investigation	Assessment /Investigation Mandate	Assessment/ Investigation Initiated (Requires the entry of a start time and end time, Intake # marked)	N/A

Creating an Activity Log

Frequently Asked Questions

Question: *Will an Activity Log in **Draft** status automatically be approved within 3 days?*
Answer: No, an Activity Log's "activity state" will not automatically be marked as **Completed** within 3 days. An Activity Log can remain in **Draft** status until the time of case closure. However, an Activity Log left in **Draft** status can only be **viewed** or **edited** by the person who completed the Activity Log, the assigned caseworker, and/or supervisor.

Question: *When completing an Activity Log, you have to choose the worker who did the activity. In the drop-down list, will you only see the worker who is assigned to that case or other worker's names as well?*
Answer: In the Activity Log, you will see the responsible worker's name in the drop-down list. This refers to the worker responsible for the case, not the person responsible for entering information into that Activity Log. Only those personnel with actual assignment to the case will appear in the drop-down list. However, any worker can add an Activity Log to a case even without an assignment (**unless the case is an adoption case and the worker is <u>not</u> an adoption worker**). The Activity Log will reflect that it was created by the logged-in worker.

Question: *When completing an Activity Log, where do the names on the Associate Participants screen come from?*
Answer: If the Activity Log is being completed for an Assessment / Investigation, then the names listed on the Associate Participants screen are those persons identified in the associated Intake(s).If the Activity Log is being completed for a case with the category of Ongoing, ICPC, ICAMA, Adoption Subsidy Only or Adoption, then the names listed are the identified case members associated with the given case.

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