Navigating Action Items

Knowledge Base Article

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Overview

This article describes how to navigate the new Activity Stream functionality, specific to **Action Items**. The new **Action Items** are derived from the former Ticklers and follow the same business process already in place regarding Work Items and their completion status. Action Items show work that needs to be completed based on your assignment and role.

Understanding Action Items from the Home Page

Note: Action Items replaced the previous Ticklers, and follow the same business process, providing guidance on Work items due. Action Items display based on assignment and role.

When an employee logs into the SACWIS Home screen, the page defaults to **Alerts**.

1. Click the **Action Items** tab to the right of **Alerts**.

The **Action Items** screen appears. Action Item “Buckets,” or categories, display across the top of the page.

Action Item Buckets include

- Assessment/Investigation
- Ongoing/Adoption
- Visitation
- Provider
- General

Up to five Action Item Buckets may display, based on assignments and role. For example, if you (or your subordinate team members) do not have Provider assignments, the Provider bucket will not display. Each Bucket will display only if the logged-in user has current Action Items within that category.

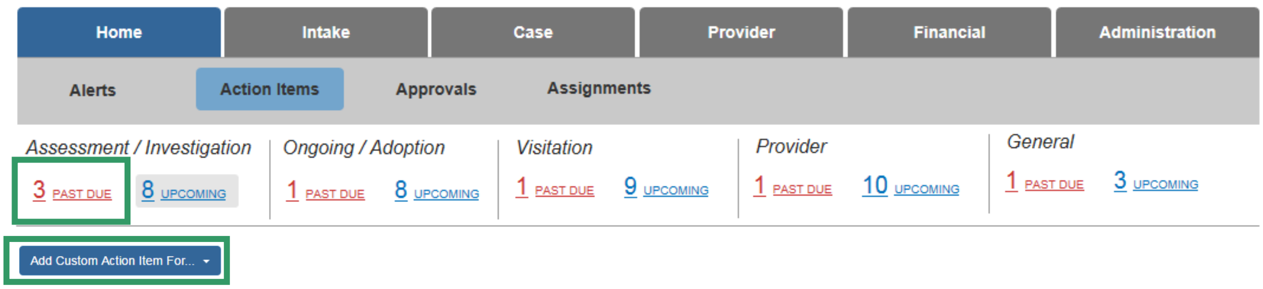
Within the Bucket, each number represents the total number of Action Items within that category which are either past due or coming due. Past Due items are depicted in red text. Upcoming items are in blue text.

The **Action Items** selection defaults to the top left set of Action Items in the first Bucket. Past Due items, if any, will always display to the left of Upcoming items. Click on any of the available Past Due or Upcoming selections within any Bucket to view that specific set of Action Items.

Navigating Action Items

The user has the option to add Custom Action Items to any Bucket by using the, "Add Custom Action Item For…" button located below the Buckets. This functionality is discussed later under the heading, "Adding a Custom Action Item."

Caseworker Action Items Bucket view:



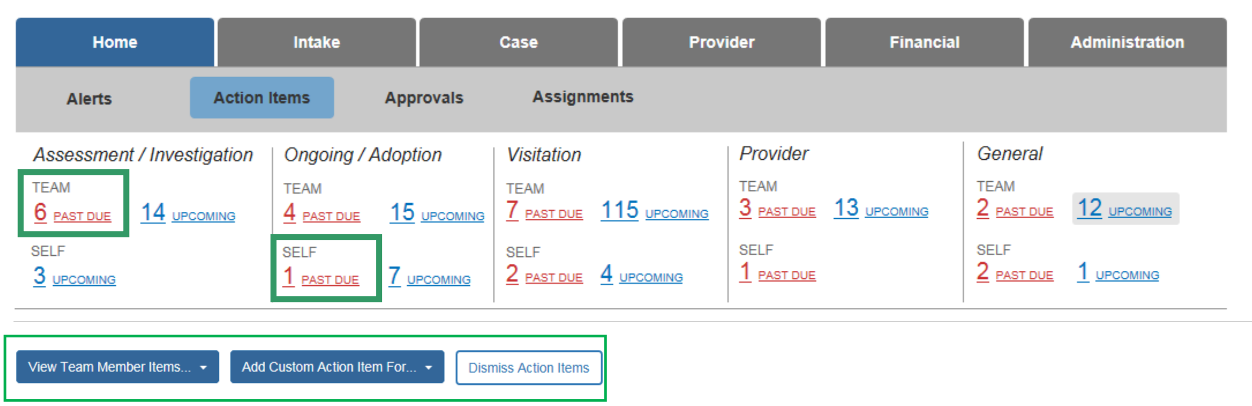
Supervisor Action Items Bucket view:

For unit Supervisors, each **Action Item** Bucket is divided into **Team** and **Self** categories.

- **Team** displays the number of **Past Due** and **Upcoming** Action Items for which the Supervisor's Team Members are responsible.
- **Self** displays the number of **Past Due** or **Upcoming** Action Items for which the Supervisor is directly responsible based on his/her own assignment and role.

Below the Buckets, the Supervisor has the following buttons available, which are discussed later in this article:

- **View Team Members Items…**
- **Add Custom Action Items For…**
- **Dismiss Action Items**



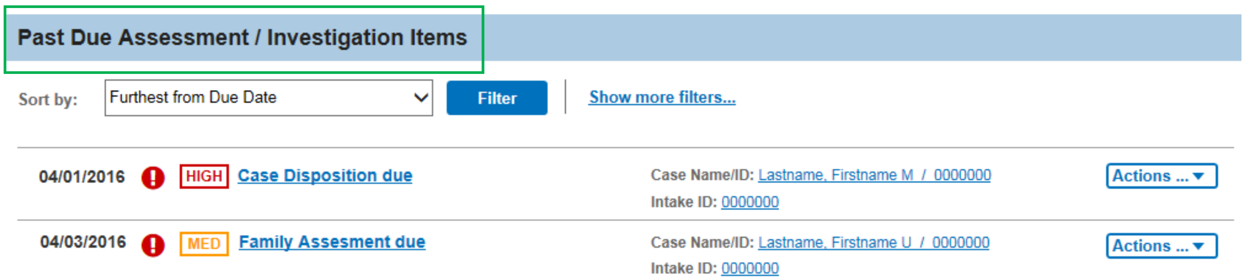
The selected list set of Action Items displays on the lower section of the page.

Action Items Display

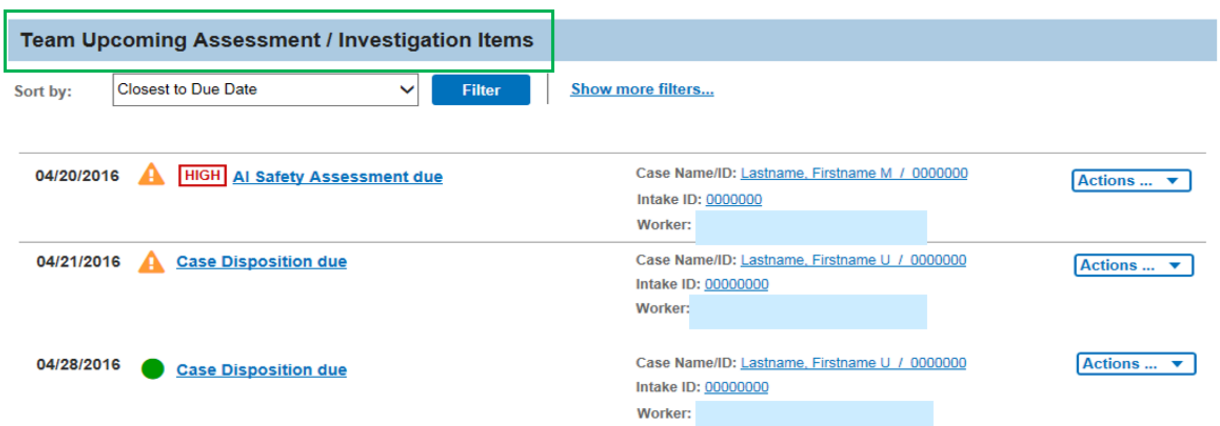
A blue bar specifies which Action Items are included in the selected list set. In the example below, **Past Due Assessment/Investigation Items** are displayed.

Note: If a Priority has been set for an Action Item, the Priority status will appear immediately before the item.

Past Due Action Items display with the icon to signify the work item is overdue.



Upcoming Action Items display with the icon to signify the work item will be due or the icon to signify a work item is nearing its due date.



The **Due Date** for each Action Item is displayed on the left. The Action Item message is a hyperlink to the page where the work item can be completed.

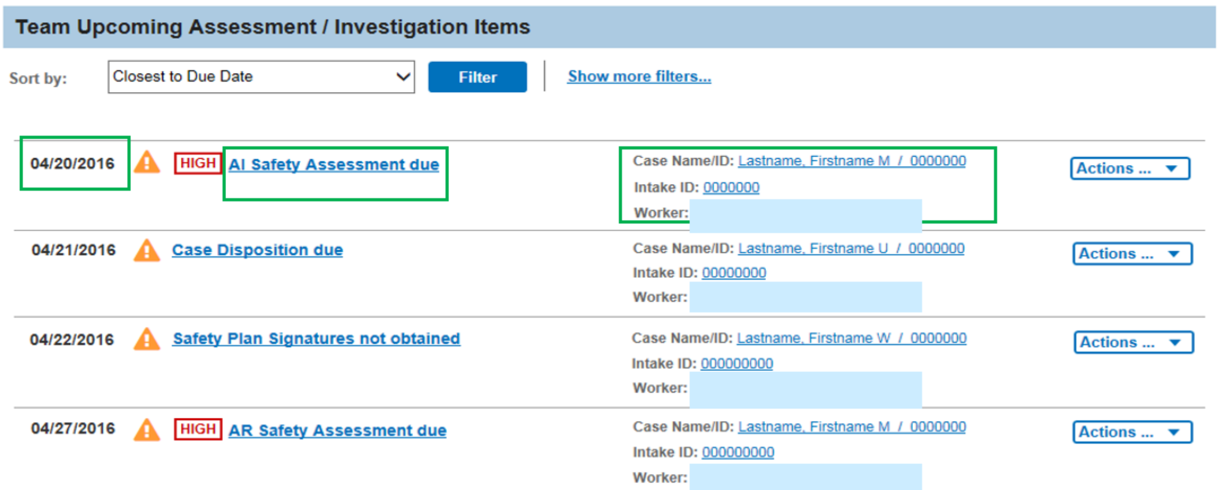
For Visitation Action Items, a **Location/Contact** link displays below the message. Click the link to display the Address and Contact information for the child's placement or living arrangement, if applicable. Otherwise, the child's primary address and contact display.

Navigating Action Items

Identifiers (specific to each action item, as applicable), include:

- **Case Name/ID**
- **Intake ID**
- **Person Name/ID**
- **Provider Name/ID**

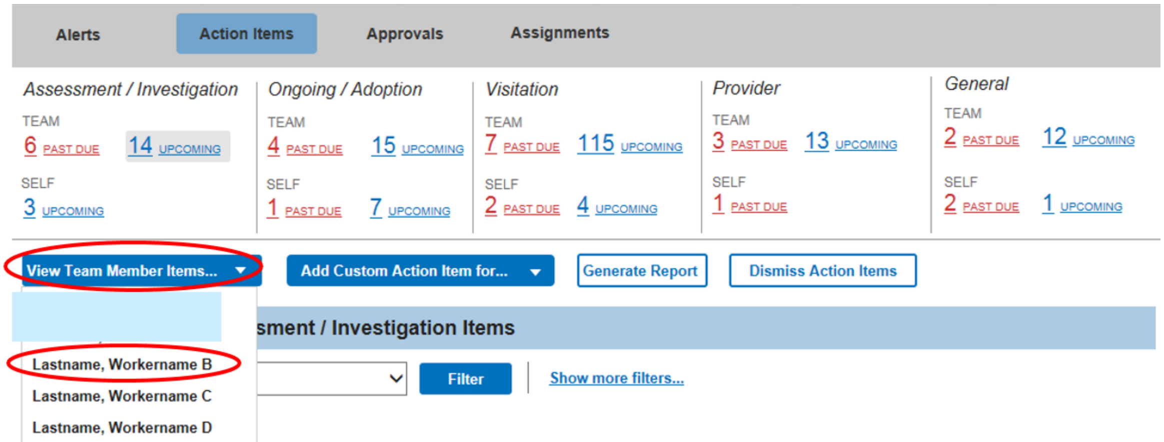
The identifiers are hyperlinks to the Case/Provider/Person/Intake to which the Action Item applies.



Viewing Team Member Items

The **View Team Member Items** button is available *only for unit Supervisors*. Clicking the View Team Member Items button allows the Supervisor to filter for Action Items by a specific **Team Member**, and view the **Past Due** and **Upcoming** Action Items for that individual worker.

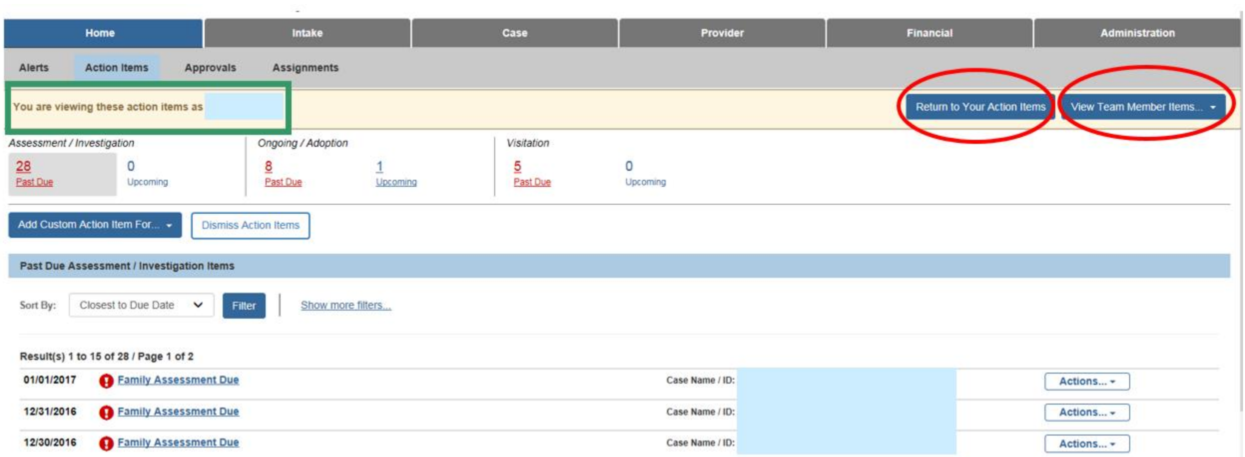
1. Click **View Team Member Items**.
2. Click the **Team Member** name you wish to view.



The Supervisor is directed to the selected Team Member's Action Items with the following message: *"You are viewing these action items as (Caseworker last name, first name, and middle initial)."*

The following two options are located in the right corner of the displayed Team Member's **Action Items** screen:

1. **Return to Your Action Items**: Selecting this option returns the Supervisor to *their* Home Action Items page.
2. **View Team Member Items**: Selecting this option provides the Supervisor the opportunity to view the Action Items page of *another individual worker*.



Adding Custom Action Items

Custom Action Items, prior to the new functionality, were called *Ad Hoc Ticklers*. A Custom Action Item allows users to create reminders to complete tasks for which SACWIS does not automatically generate Action Items.

- A Custom Action Item may be created independent of a specific Assignment. These will only display on the Home Action Items page, not on any Case or Provider Overview.

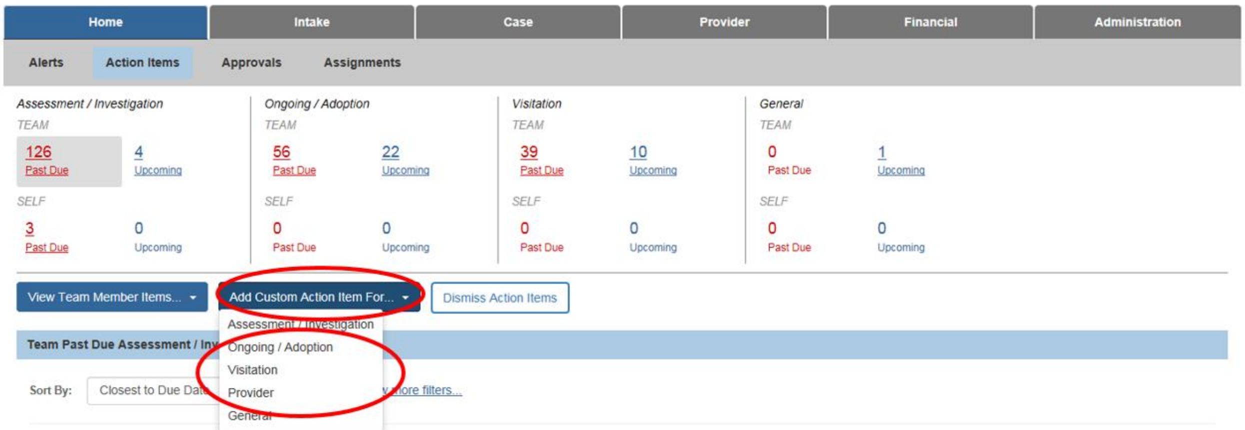
Navigating Action Items

- A Custom Action Item can also be associated to a specific Case, Provider, or Person, if desired. If a Custom Action Item is associated to a specific assignment, it will display on the applicable Case or Provider Overview, as well as on the Home page.
- Whether viewing the Home Action Items page or a Case or Provider Overview, a Custom Action Item will only display for the user who created it, or for the person for whom it was created by the Supervisor.
- Users have the option to add a Custom Action Item to any Bucket.

Navigating Action Items

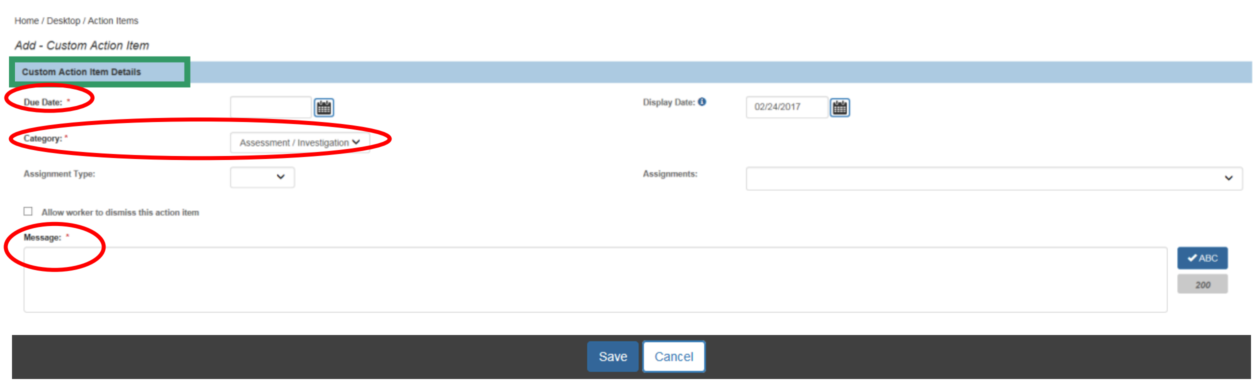
To add the Custom Action Item:

1. Click, **Add Custom Action Item For**…
2. Select the appropriate Bucket from the drop-down list.



The user is directed to **The Custom Action Items Details** page to create the Action Item.

3. Enter the Action Item **Due Date**.
4. Note: The Action Item **Display Date** defaults to the current date, but can be changed if desired. The Display Date is the date on which the Custom Action Item will begin to display in SACWIS.
5. Select the Category (Bucket) where the Action Item is to display. The Category is pre-populated with the previous selection (Step 2), but the selection can be changed, if necessary.
6. Enter the Message to display (i.e., Complete referrals for service linkages).



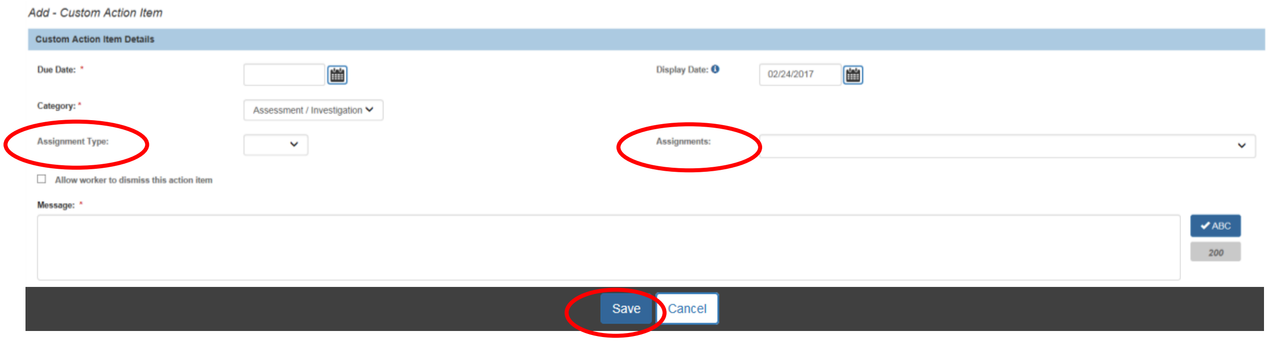
Navigating Action Items

To associate an Action Item to a specific Case, Provider, or Person:

7. Select the **Assignment Type** from the drop-down menu.

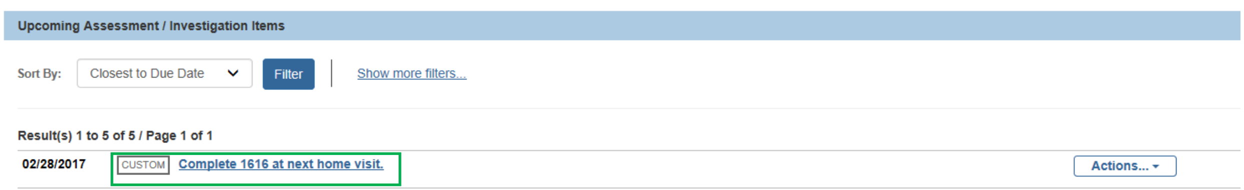
8. Select the **Assignments** from the drop-down list of assignments. Options in the Assignments drop-down are based on the Assignment Type selected. For example, if the Assignment Type is Case, a list of Cases to which the worker is assigned will be available for selection in the Assignments drop-down.

9. Click **Save**.



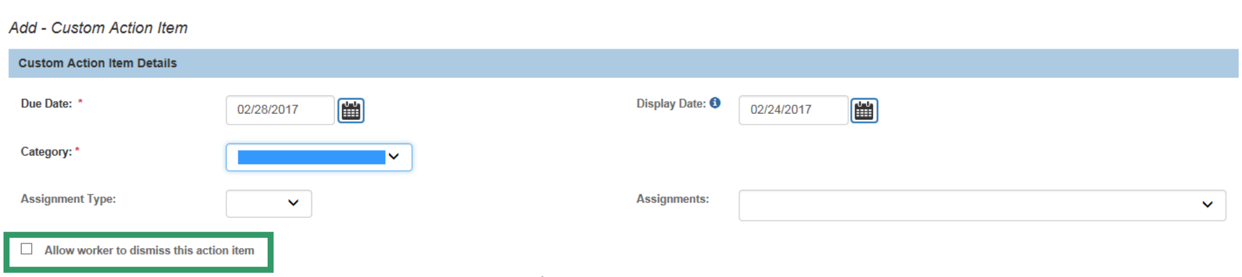
Below is an example of a Custom Action Item created by a Caseworker. It exemplifies how the Custom Action Item displays as an Upcoming Action Item due on the Home page.

Note: A Custom Action Item will display with the gray **Custom** badge next to it.



The Custom Action Item will continue to display until it is manually dismissed.

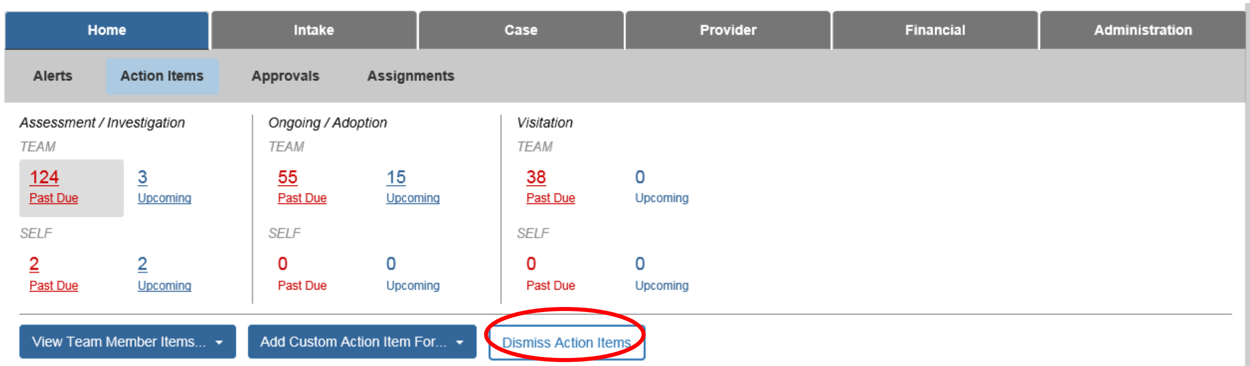
Note: When a Supervisor is viewing Team Member Items for an individual worker, and selects Add Custom Action Item For…, the Custom Action Item is created *for the individual worker*. The Supervisor has the option to select the checkbox "Allow worker to dismiss this action item.*" If this checkbox is selected, the worker can dismiss the Custom Action Item. Otherwise, only the Supervisor can dismiss it*. Refer to "Dismissing Action Items" section below.



Dismissing Action Items

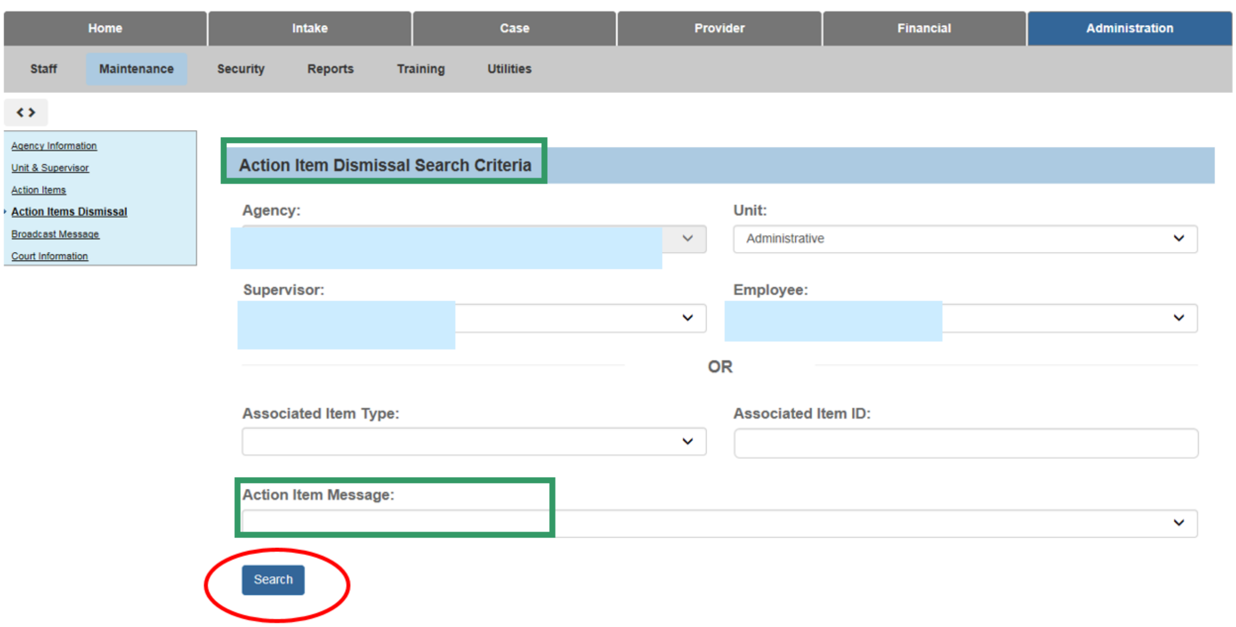
A Supervisor, or other individual(s) with the required security profile, can manually dismiss Action Items. Any user can dismiss the Custom Action Items they create. Security profiles are at the discretion of each agency.

1. Click the **Dismiss Action Items** button.



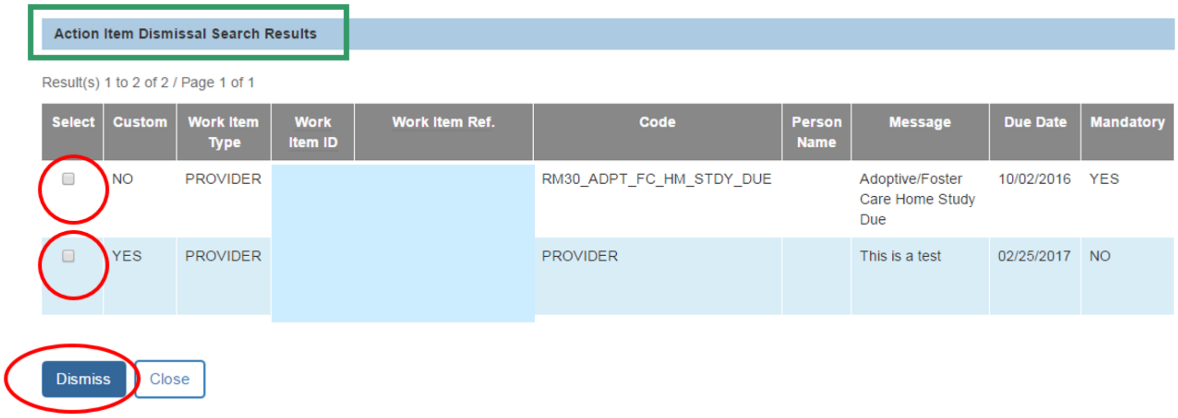
The Supervisor will be directed to the **Action Item Dismissal Search Criteria** page to select a specific Action Item(s) to dismiss. The Agency, Unit, Supervisor and Employee fields will be pre-populated, as well as a list of the Employee's Action Items. Selection of an Action Item Type, Associated Item ID, and/or Message is optional.

2. If you made changes to the selections, click **Search** to yield results.



Navigating Action Items

The **Action Item Dismissal Search Results** screen appears.

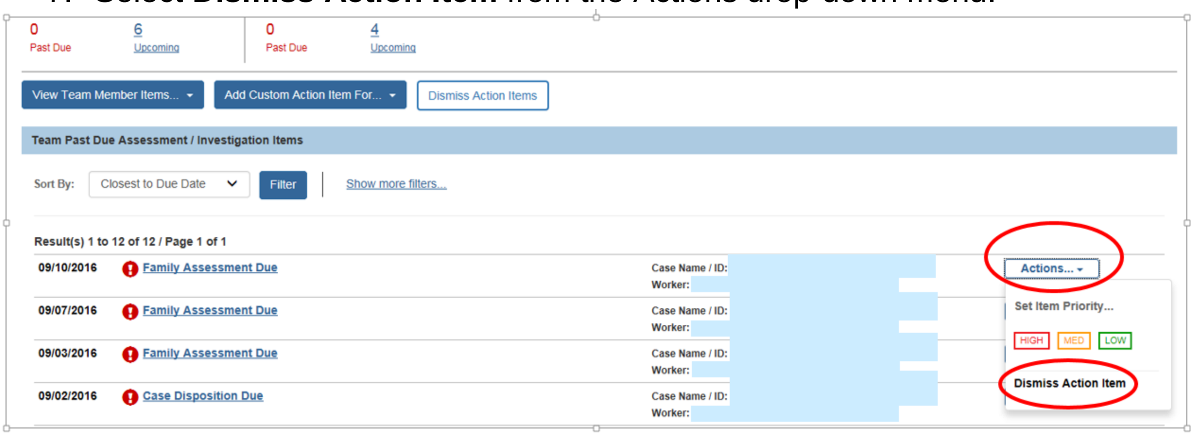


3. Click the box beside the item(s) to be dismissed.
4. Click the **Dismiss** button.

An Action Item can also be dismissed from the **Actions** drop-down menu beside the Action Item. The Actions menu displays when the logged in user is a Supervisor.

All workers will see the **Actions** menu beside **Custom Action Items**, which they can dismiss themselves. This includes those created by the worker, as well as those created for the worker by the Supervisor when the Supervisor selected the option to allow the worker to dismiss the Custom Action Item.

5. Determine what Action Item should be deleted.
6. Click on the Actions drop-down menu.
7. Select **Dismiss Action Item** from the Actions drop-down menu.



The **Action Item Dismissal Search Results** page appears.

8. Click the box beside the item to be dismissed.
9. Click the **Dismiss** button.

Action Item Dismissal Search Results

Result(s) 1 to 1 of 1 / Page 1 of 1

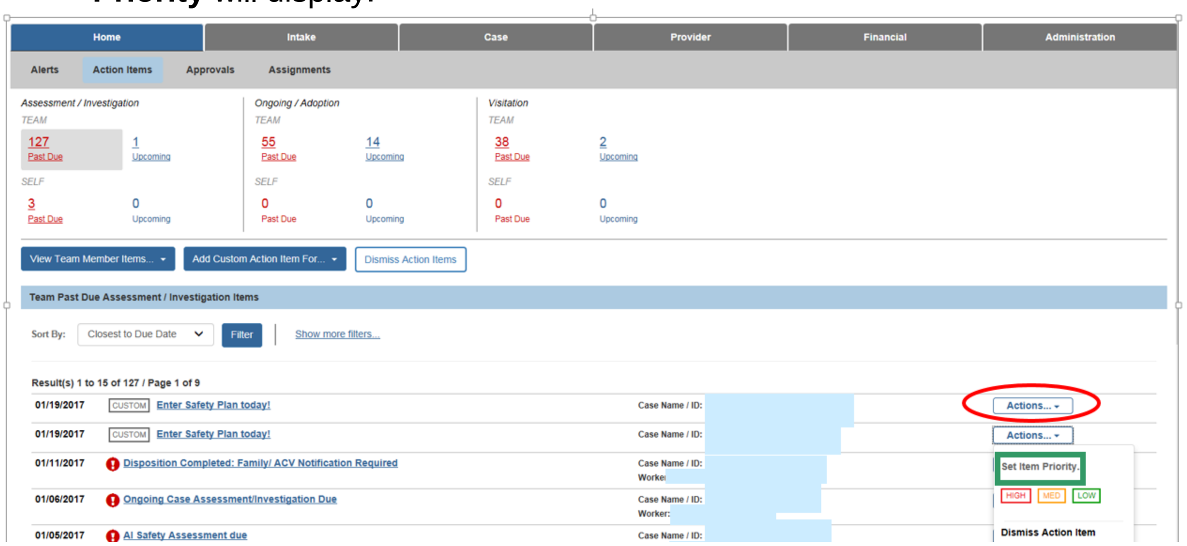
Select	Custom	Work Item Type	Work Item ID	Work Item Ref.	Code	Person Name	Message	Due Date	Mandatory
☐	NO	CASE			IN03_FAMILY_AI_DUE		Family Assessment Due	09/07/2016	YES

Dismiss Close

Setting Priority Status for Action Items

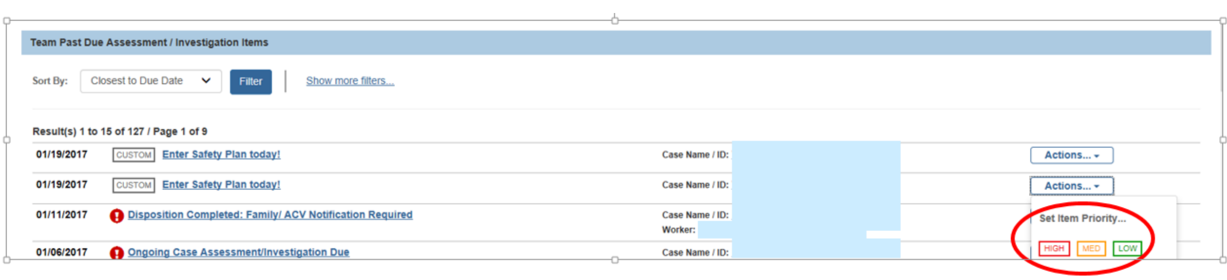
A Supervisor has the ability to set the priority status of any Action Item.

1. Click the **Actions** button next to an Action Item or Custom Action Item. **Set Item Priority** will display.



2. Select the desired priority status by clicking one of the following options:

HIGH MED LOW



Navigating Action Items

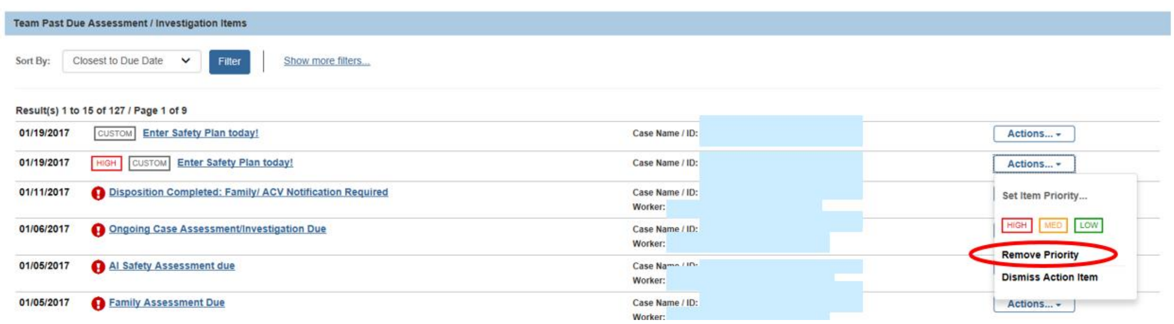
The selected Priority status displays next to the Action Item.

Note: When a Priority status has been added to an Action Item, it will display wherever the Action Item is displayed, including the Home Alerts page, as well as on the Case or Provider Overview, as applicable.

Removing Priority Status from Action Items

The Supervisor can remove the Priority status from an Action Item.

1. Click **Remove Priority** on the **Actions** drop-down menu.



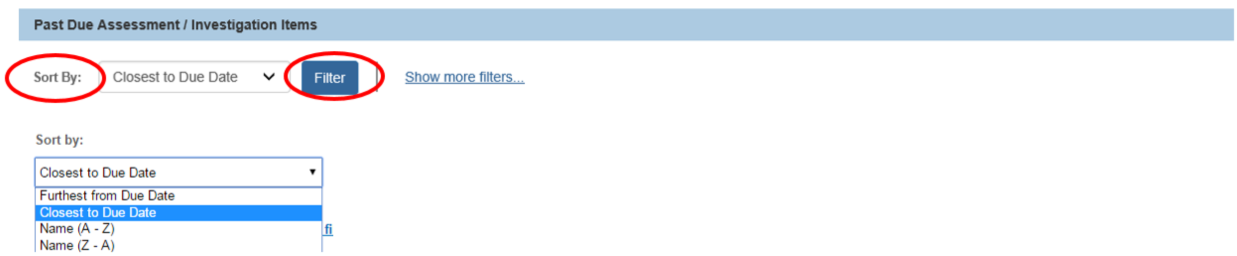
The Priority label will no longer appear beside the **Action Item**.

Using Action Item Filters

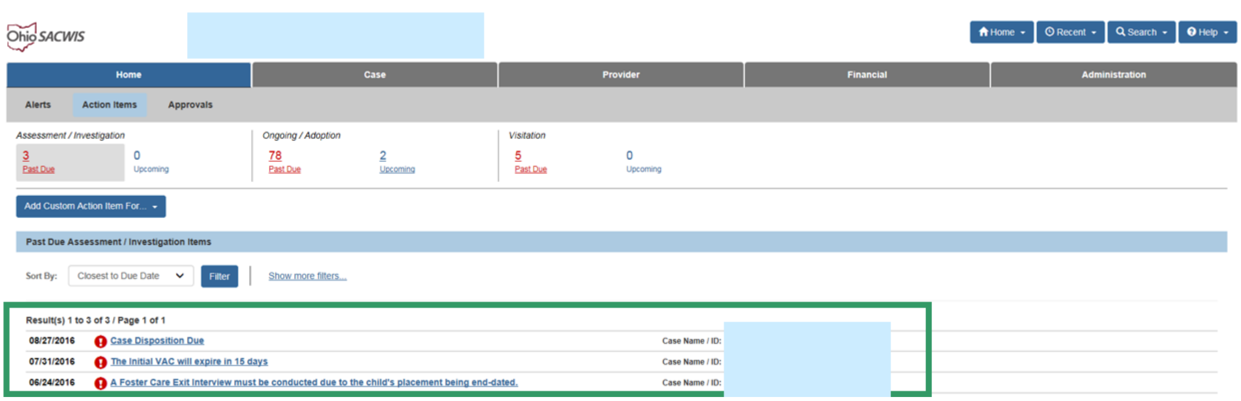
A user can find specific Past Due or Upcoming Action Items by using the **Filter** options. Once a user clicks Action Items, a list of Action Items will appear in the default view, *Closest to Due Date*.

1. Click the Sort By drop-down menu to select a sort option different than the default value. There are three additional sorting options that display for selection:
    - Furthest From Due Date
    - Name (A-Z)
    - Name (Z-A)

2. Click the Filter button (only if you have selected a Sort By option other than the default value (Closest to Due Date).



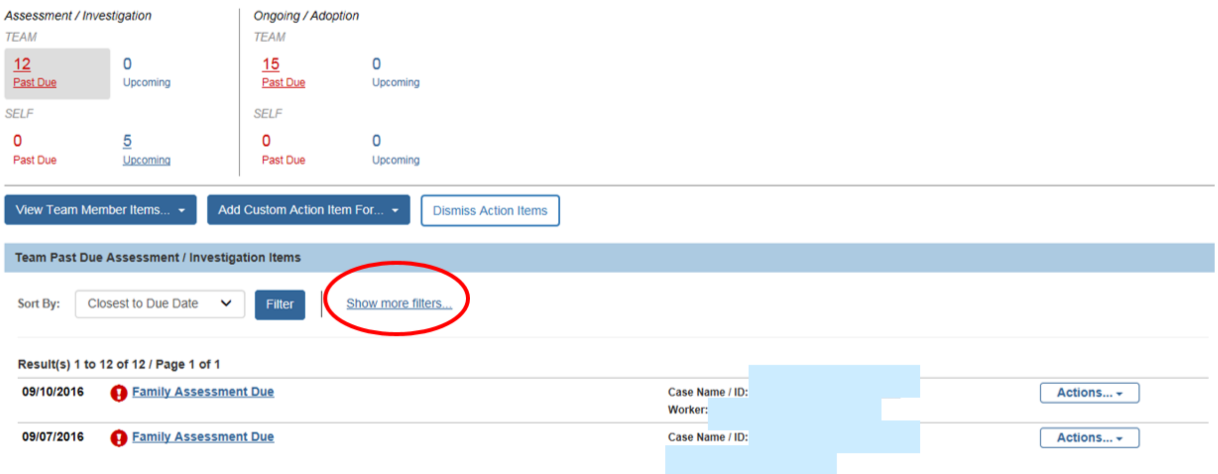
Results display based on the selected sort criterion. In this example, the default view is shown.



Navigating Action Items

Filters can be used to find Action Items related to specific case work items.

1. Click **Show More Filters**.



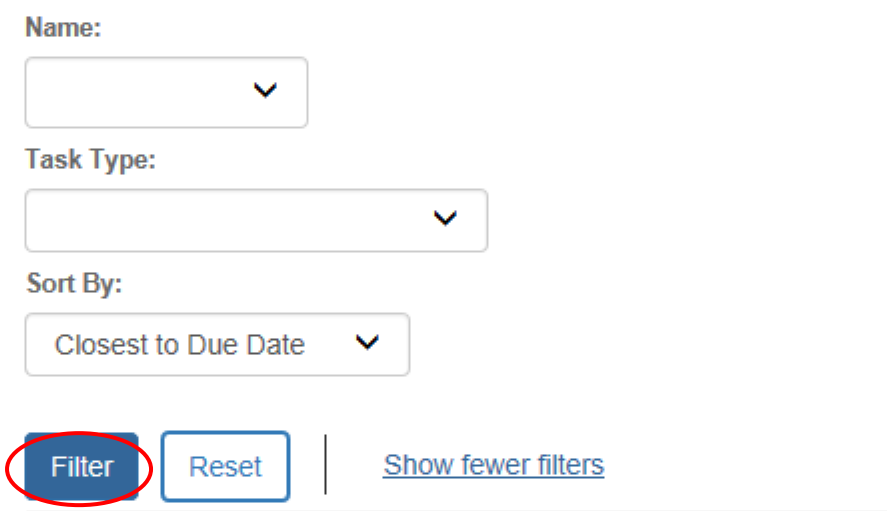
Note: In addition to the **Sort By** Filter, the User can filter by using drop-down menus under **Name** or **Task Type**. The user may use one or more Filters, depending on the information being sought.

The **Name** drop-down includes a list of Assignments, such as Cases or Providers, found in the list.

When a Case Name is selected, a Person field displays, allowing the user to further refine the results by selecting a specific Case Member.

The **Task Type** drop-down includes a list of work items, such as, Case Plan or Safety Plan, to which the results can be limited. For example, select Case Review to view all the Action Items for Case Review Due.

2. After selecting the desired filters, click **Filter**.



Any Action Items meeting the specific criteria will display.

1. Click Reset to return to the default settings.
2. Click Show fewer filters to minimize the filter display.

Note: When filters are collapsed, one or more gray boxes may appear under the Sort By drop-down menu. This indicates what, if any, Filters are being used.

1. Click the gray box (in this example, **Name** and **Task Type**) to clear the Filter.

Navigating the Case Overview Page

Action Items also display on the Case Overview and Provider Overview pages. To view Action Items from the Case Overview page:

1. Click Case on the Home page.
2. Click Workload.
3. Click on a specific case from the Workload list.

The user is directed to the Case Overview page.

The Action Items appear on the second half of the Case Overview page. All Past Due and Upcoming Action Items for the Case display in a list.

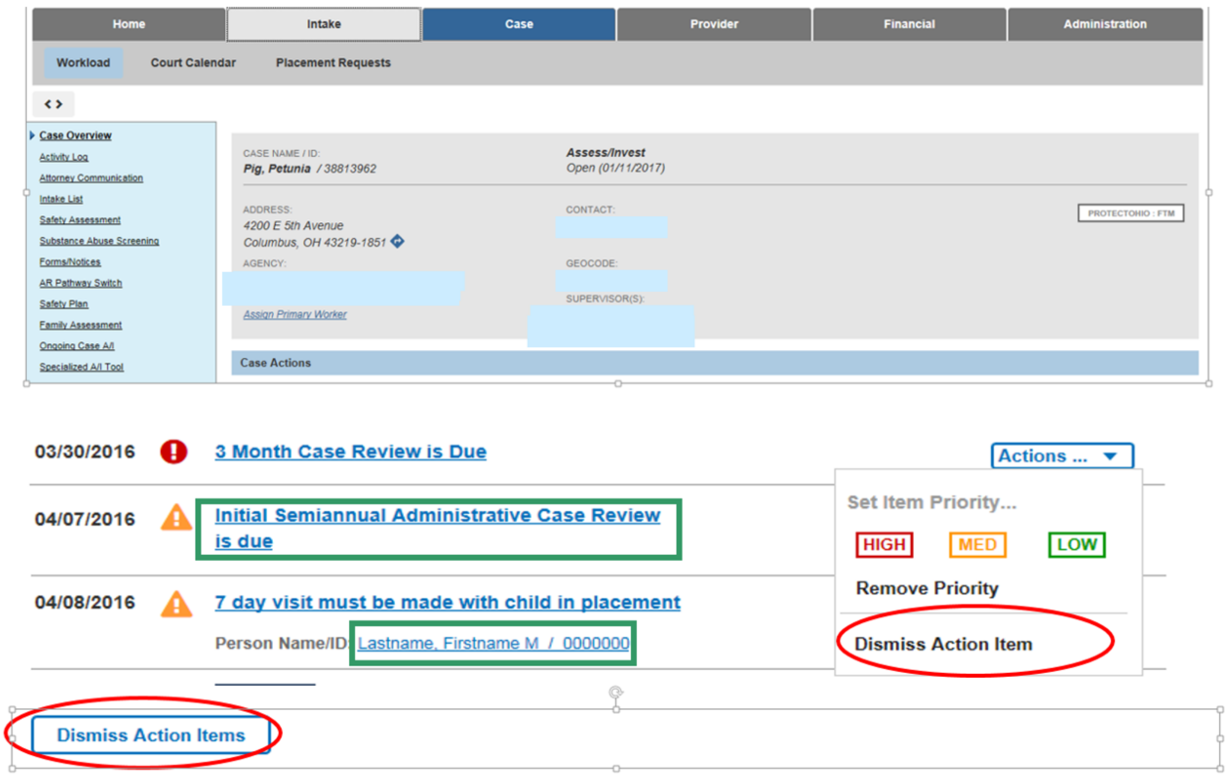
The display and function of Action Items already described for the Home Alerts page also apply from the Case Overview. These functions are:

- Hyperlinks to Work Items or Person. (Case hyperlink is not applicable when viewing within the Case.)
- Supervisor has the ability to Set Item Priority or Dismiss Priority
- Caseworker and Supervisor can Dismiss Custom Action Items
- Supervisor or other individual(s) with the appropriate security profile can Dismiss system generated Action Items

Navigating Action Items

For users with the appropriate security profile:

1. Click **Dismiss Action Items** at the bottom of the page, or from the **Actions** drop-down menu, to navigate to the Action Items Dismissal page in Administration> Maintenance.



If you need additional information or assistance, please contact the SACWIS Help Desk.