

Dismissal of Action Items



Knowledge Base Article

Table of Contents

Overview 3

Security Requirements 3

Navigating through the Action Items Dismissal Link..... 3

Navigating through the Case Overview Screen..... 5

Navigating through the Action Items Tab 6

Overview

This article describes how to manually dispose of Ohio SACWIS Action Item links. Action Items are prompts or reminders of work item due dates, both past and present. The system should automatically remove action items once the task has been completed, but in the instances where it does not, users may use the Action Item Dismissal function to clear these reminders after the due date has passed.

Note: In adoption cases, disposal of future dated action items is allowed.

There are three ways to navigate to the screen and each is discussed in this Knowledge Base Article.

Security Requirements

This functionality requires assignment to the User Group called **Action Item Disposal**.

Navigating through the Action Items Dismissal Link

1. On the Ohio SACWIS **Home** screen, click the **Administration** tab.
2. Click the **Maintenance** tab.
3. Click the **Action Items Dismissal** link in the **Navigation** menu. The **Action Item Dismissal Search Criteria** screen appears.

Note: If you navigate to the screen this way, the **Associated Item Type** field and **Associated Item ID** field do not auto-populate, and no **Close** button appears at the bottom of the screen.

4. In the **Unit** field, select the appropriate unit.
5. In the **Supervisor** field, select the appropriate name.
6. In the **Employee** field, select the appropriate name.
7. Or, enter other search criteria as needed.
8. Click the **Search** button.

Dismissal of Action Items

Home Intake Case Provider Financial Administration

Staff Maintenance Security Reports Training Utilities

Agency Information
Unit & Supervisor
Action Items
Action Items Dismissal
Biblical Messages
Court Information
KCCP Eligibility Income Limits

Action Item Dismissal Search Criteria

Agency: [Please Select A Unit] Unit: [Please Select A Unit]

Supervisor: [Please Select A Supervisor] Employee: [Please Select An Employee]

OR

Associated Item Type: [] Associated Item ID: []

Action Item Message: []

Search

The **Action Item Dismissal Search Results** section populates with information.

9. Click the **Select** check box next to the action item grid row(s) you want to delete.
10. Click the **Dismiss** button.

Action Item Dismissal Search Results

Result(s) 1 to 5 of 5 / Page 1 of 1

Select	Custom	Work Item Type	Work Item ID	Work Item Ref.	Code	Person Name	Message	Due Date
<input checked="" type="checkbox"/>	NO	CASE			IV18_INITIAL_MNDT_RPTR_LTR_DUE		Initial Mandated Reporter Letter Due	07/27/2022
<input checked="" type="checkbox"/>	NO	CASE			IN03_FAMILY_AR_DUE		Family Assessment Due	09/02/2022
<input type="checkbox"/>	NO	CASE			IN03_FAMILY_AR_DUE		Family Assessment Due	08/20/2022
<input type="checkbox"/>	NO	CASE			IN03_FAMILY_AR_DUE		Family Assessment Due	09/09/2022
<input type="checkbox"/>	NO	CASE			IN03_FAMILY_AR_DUE		Family Assessment Due	09/16/2022

Dismiss

As shown in gold, the selected row(s) are deleted from the grid.

Dismissal of Action Items

Select	Custom	Work Item Type	Work Item ID	Work Item Ref.	Code	Person Name	Message	Due Date
<input type="checkbox"/>	NO	CASE			IN03_FAMILY_AR_DUE		Family Assessment Due	08/20/2022
<input type="checkbox"/>	NO	CASE			IN03_FAMILY_AR_DUE		Family Assessment Due	09/09/2022
<input type="checkbox"/>	NO	CASE			IN03_FAMILY_AR_DUE		Family Assessment Due	09/16/2022

Dismiss

Navigating through the Case Overview Screen

1. On the Ohio SACWIS **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Select the appropriate **Case ID** Number. The **Case Overview** screen appears displaying any action items in the **Action Items** section.
4. Click the **Dismiss Action Items** link.

Action Items	Case Alerts	Dashboard	Assignments / Eligibility
Result(s) 1 to 3 of 3 / Page 1 of 1			
07/26/2022	Initial Mandated Reporter Letter Due		Actions...
08/28/2022	Family Assessment Due		Actions...
09/01/2022	Family Assessment Due		Actions...
Dismiss Action Items			
Close			

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

Note: As shown in red on the next page, if you navigate to the screen this way, the system auto-populates the **Associated Item Type** field and **Associated Item ID** field, and a **Close** button appears at the bottom of the screen.

Dismissal of Action Items

5. Click the **Select** check box next to the action item grid row(s) you want to delete.
6. Click the **Dismiss** button.

Associated Item Type: Associated Item ID:

Action Item Message:

Search

Action Item Dismissal Search Results

Result(s) 1 to 3 of 3 / Page 1 of 1

Select	Custom	Work Item Type	Work Item ID	Work Item Ref.	Code	Person Name	Message	Due Date
<input checked="" type="checkbox"/>	NO	CASE			IV18_INITIAL_MNDT_RPTR_LTR_DUE		Initial Mandated Reporter Letter Due	07/26/2022
<input checked="" type="checkbox"/>	NO	CASE			IN03_FAMILY_AR_DUE		Family Assessment Due	08/28/2022
<input type="checkbox"/>	NO	CASE			IN03_FAMILY_AR_DUE		Family Assessment Due	09/01/2022

Dismiss Close

The selected row(s) are deleted from the grid. A message appears at the top of the screen saying the selected action items have been disposed.

7. When complete, click the **Close** button.

The selected Action Items have been dismissed.

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
<input type="checkbox"/>	NO	CASE			IN03_FAMILY_AR_DUE		Family Assessment Due	09/01/2022

Dismiss Close

The **Case Overview** screen appears.

Navigating through the Action Items Tab

1. On the Ohio SACWIS **Home** screen, click the **Action Items** tab.

Dismissal of Action Items

The **Action Items** screen appears.

Note: As shown in the next page, clicking on **Dismiss Action Items** will navigate to the **Action Item Dismissal Search Criteria** screen with the search criteria populated.

2. Click the **Actions** drop down next to the action item you want to delete.

The screenshot shows the 'Action Items' screen with a navigation bar at the top containing 'Home', 'Intake', 'Case', 'Provider', 'Financial', and 'Administration'. Below this is a sub-navigation bar with 'Alerts', 'Action Items', 'Approvals', and 'Assignments'. The main content area is divided into three columns: 'Assessment / Investigation', 'Ongoing / Adoption', and 'Visitation'. Each column has a 'TEAM' and 'SELF' section with counts for 'Past Due' and 'Upcoming' items. At the bottom of the main content area, there are three buttons: 'View Team Member Items...', 'Add Custom Action Item For...', and 'Dismiss Action Items', with the latter highlighted by a red box. Below this is a section for 'Team Past Due Assessment / Investigation Items' with a 'Sort By' dropdown set to 'Closest to Due Date' and a 'Filter' button. The results table shows three rows of 'Family Assessment Due' items with 'Actions...' dropdown menus circled in red.

3. Click the **Dismiss Action Item** link.

The screenshot shows the 'Actions...' dropdown menu with options for 'Set Item Priority...' (with 'HIGH', 'MED', and 'LOW' buttons) and 'Dismiss Action Item', which is circled in red.

The **Action Item Dismissal Search Criteria** screen appears with the search criteria populated.

4. Click the **Select** check box next to the action item grid row(s) you want to delete.

5. Click the **Dismiss** button.

Dismissal of Action Items

Associated Item Type: Associated Item ID:

Action Item Message:

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
<input type="checkbox"/>	NO	CASE			IN03_FAMILY_AR_DUE		Family Assessment Due	09/28/2022

The selected row(s) are deleted from the grid. A message appears at the top of the screen saying the selected action items have been disposed.

The selected Action Items have been dismissed.

6. When complete, click the **Close** button.

Associated Item Type: Associated Item ID:

Action Item Message:

Action Item Dismissal Search Results

Result(s) 0 / Page 0 of 0

Select	Custom	Work Item Type	Work Item ID	Work Item Ref.	Code	Person Name	Message	Due Date
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No Records Found

The **Case Overview** screen appears.

Dismissal of Action Items

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at SACWIS_HELP_DESK@jfs.ohio.gov .