

Critical Incident Reports – Filtering Views



Knowledge Base Article

Critical Incident Reports – Filtering Views

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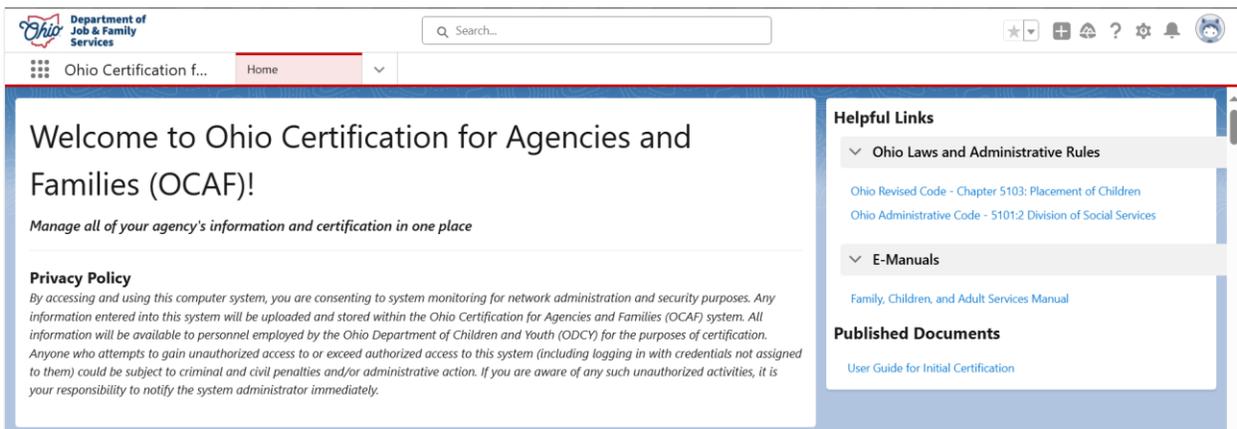
Critical Incident Reports – Filtering Views

Overview

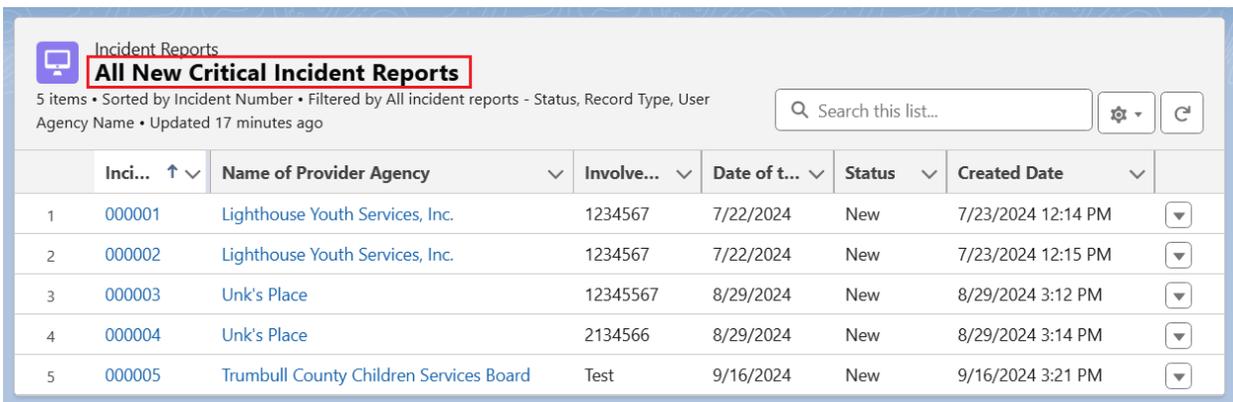
This article describes how to access Critical Incident Reports and Filter the Views within the Ohio Certification for Agencies and Families (OCAF) system.

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**.

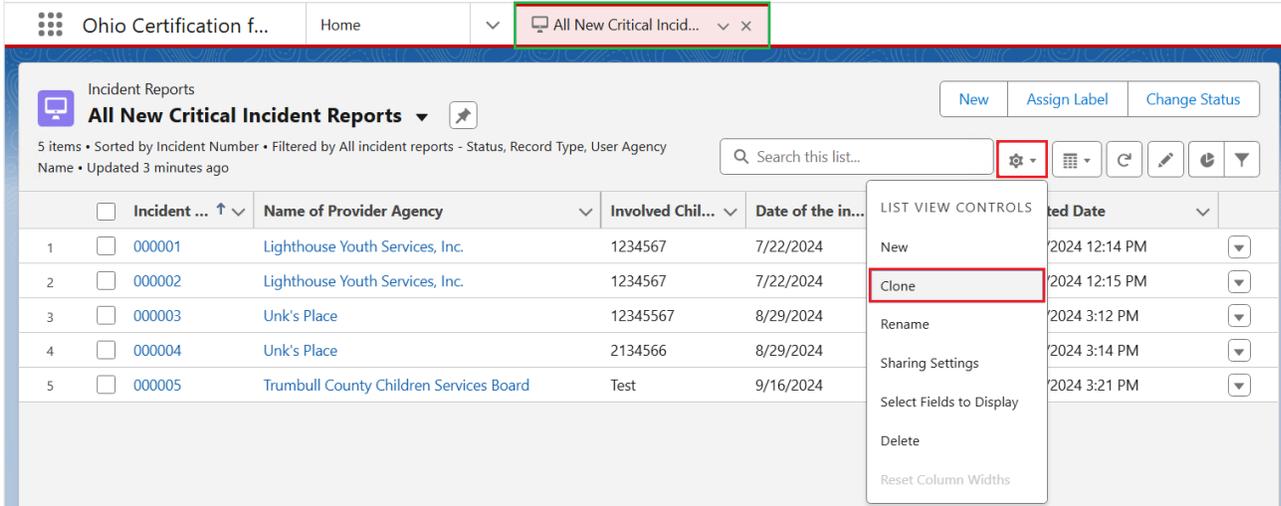


The New Critical Incident Reports tab displays.

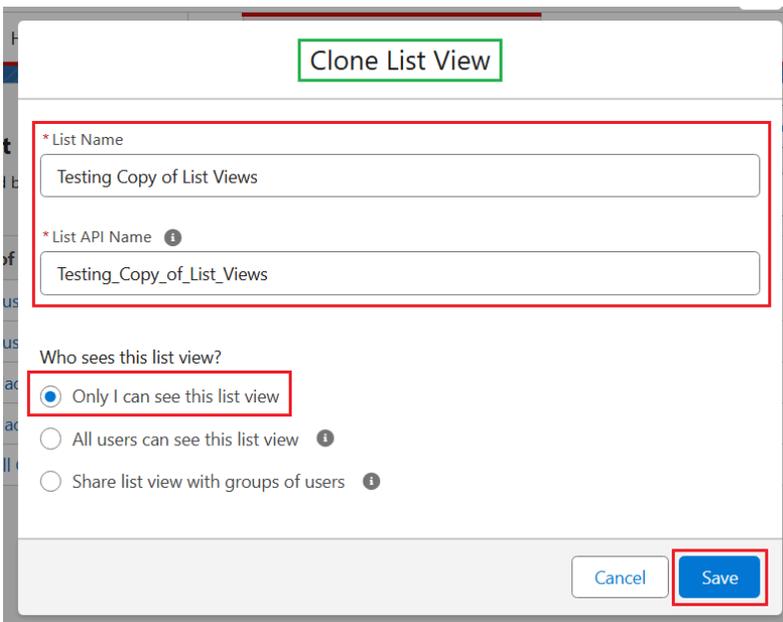
Critical Incident Reports – Filtering Views

Filtering List Views

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



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.



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.

Critical Incident Reports – Filtering Views

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

Ohio Certification f... Home Testing Copy of List ...

Incident Reports
Testing Copy of List Views

5 items • Sorted by Incident Number • Filtered by All incident reports - Status, Record Type, User Agency Name • Updated a few seconds ago

Search this list...

Filter by Owner

- All incident reports
- My incident reports
- Filter by scope
- Queue owned incident reports

Done

Filters

Filter by Owner
All incident reports

Matching all of these filters

- Record Type equals Critical Incident Report
- Status equals New
- User Agency Name equals True

Inc...	Name of Provider ...	Involvement
1	0000... Lighthouse Youth S...	123456
2	0000... Lighthouse Youth S...	123456
3	0000... Unk's Place	123455
4	0000... Unk's Place	213456
5	0000... Trumbull County C...	Test

10. Click the **Save** button.

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

Incident Reports
Testing Copy of List Views

5 items • Sorted by Incident Number • Filtered by All incident reports - Status, Record Type, User Agency Name • Updated 7 minutes ago

Search this list...

Cancel Save

Filter by Owner
My incident reports

Matching all of these filters

- Record Type equals Critical Incident Report

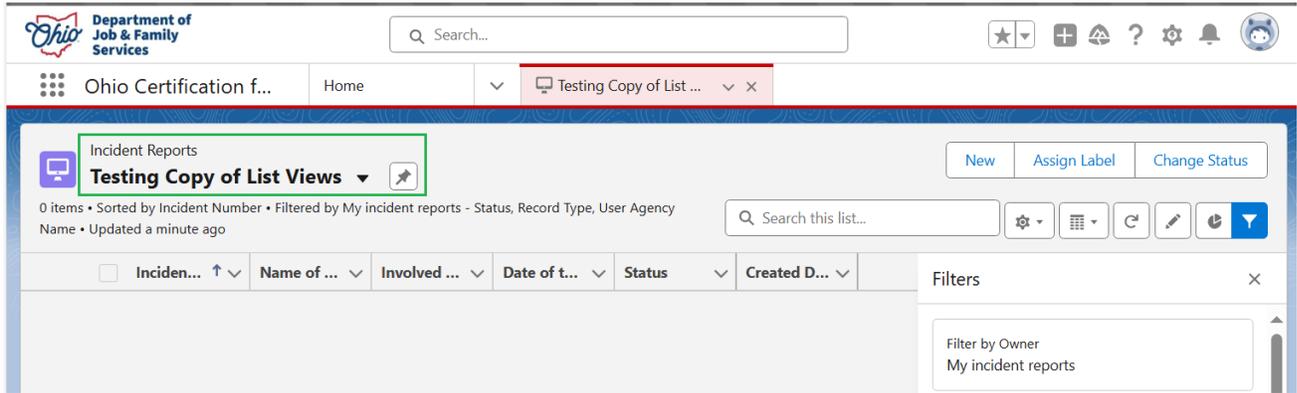
Inc...	Name of Provider ...	Involvement	Date of ...	St...	Created Date
1	0000... Lighthouse Youth S...	1234567	7/22/20...	New	7/23/2024 12:14 P...
2	0000... Lighthouse Youth S...	1234567	7/22/20...	New	7/23/2024 12:15 P...
3	0000... Unk's Place	123455...	8/29/20...	New	8/29/2024 3:12 PM
4	0000... Unk's Place	2134566	8/29/20...	New	8/29/2024 3:14 PM
5	0000... Trumbull County C...	Test	9/16/20...	New	9/16/2024 3:21 PM

A Notification displays that your List View has been updated.

List view updated.

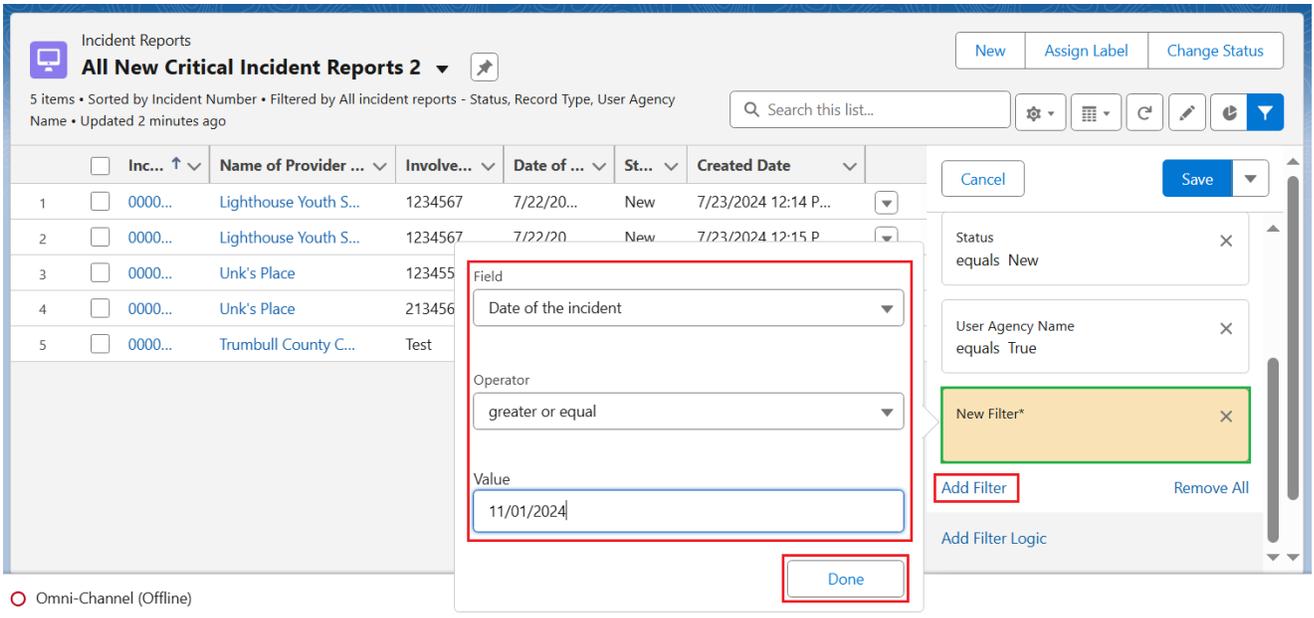
Critical Incident Reports – Filtering Views

Your updated **List View** tab displays.



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.



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

Critical Incident Reports – Filtering Views

Incident Reports
All New Critical Incident Reports 2

5 items • Sorted by Incident Number • Filtered by All incident reports - Status, Record Type, User Agency Name • Updated 7 minutes ago

Search this list...

	Inc...	Name of Provider ...	Involve...	Date of ...	St...	Created Date
1	<input type="checkbox"/> 0000...	Lighthouse Youth S...	1234567	7/22/20...	New	7/23/2024 12:14 P...
2	<input type="checkbox"/> 0000...	Lighthouse Youth S...	1234567	7/22/20...	New	7/23/2024 12:15 P...
3	<input type="checkbox"/> 0000...	Unk's Place	123455...	8/29/20...	New	8/29/2024 3:12 PM
4	<input type="checkbox"/> 0000...	Unk's Place	2134566	8/29/20...	New	8/29/2024 3:14 PM
5	<input type="checkbox"/> 0000...	Trumbull County C...	Test	9/16/20...	New	9/16/2024 3:21 PM

Filter sidebar:

- Status equals New
- User Agency Name equals True
- Date of the incident* greater or equal 11/01/2024

Add Filter Remove All

Add Filter Logic

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.

Incident Reports
All New Critical Incident Reports 2

5 items • Sorted by Incident Number • Filtered by All incident reports - Status, Record Type, User Agency Name • Updated 7 minutes ago

Search this list...

	Inc...	Name of Provider ...	Involve...	Date of ...	St...	Created Date
1	<input type="checkbox"/> 0000...	Lighthouse Youth S...	1234567	7/22/20...	New	7/23/2024 12:14 P...
2	<input type="checkbox"/> 0000...	Lighthouse Youth S...	1234567	7/22/20...	New	7/23/2024 12:15 P...
3	<input type="checkbox"/> 0000...	Unk's Place	123455...	8/29/20...	New	8/29/2024 3:12 PM
4	<input type="checkbox"/> 0000...	Unk's Place	2134566	8/29/20...	New	8/29/2024 3:14 PM
5	<input type="checkbox"/> 0000...	Trumbull County C...	Test	9/16/20...	New	9/16/2024 3:21 PM

Filter sidebar:

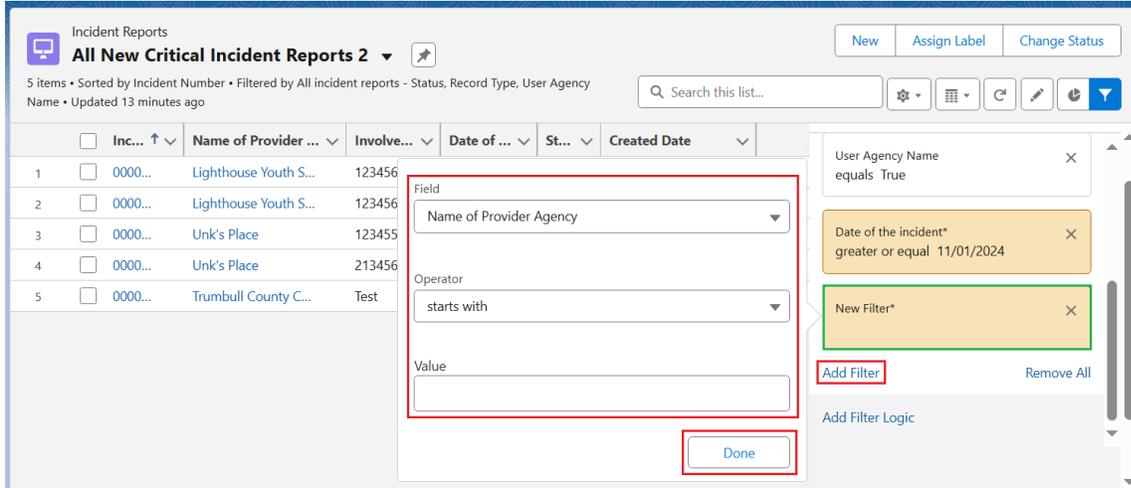
- Status equals New
- User Agency Name equals True
- Date of the incident* greater or equal 11/01/2024

Cancel **Save**

Critical Incident Reports – Filtering Views

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.

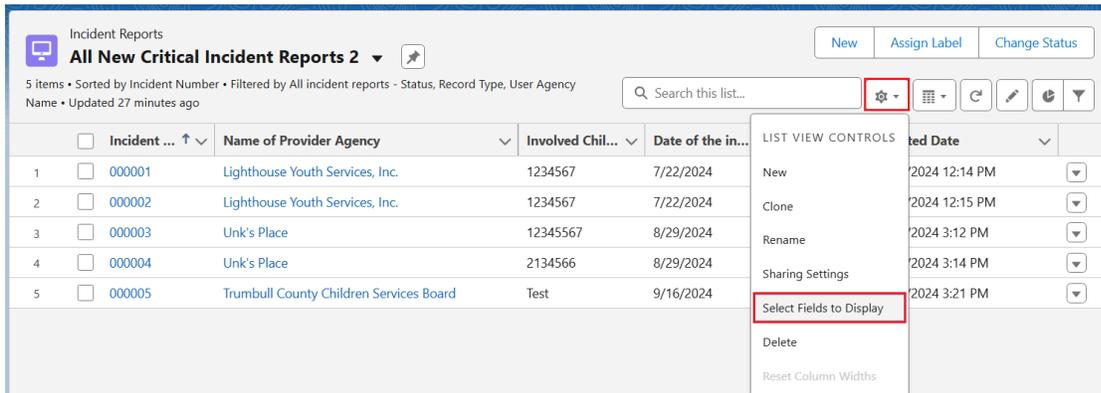


Note: If the user does not want the timeframe and only needs the Provider Agency Filter, the user can click the “X” in the corner of the Filters for the Timeframe Filters and only leave the filter for the “Name of Provider Agency.”

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

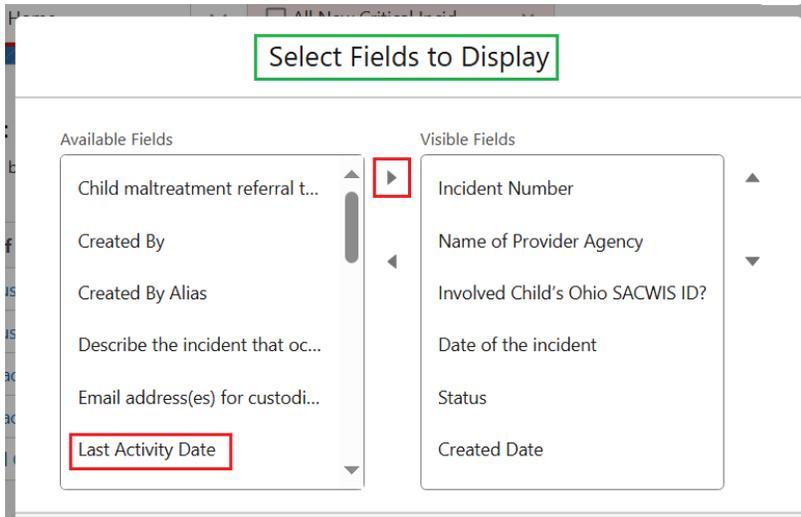
Editing the Fields Displayed

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

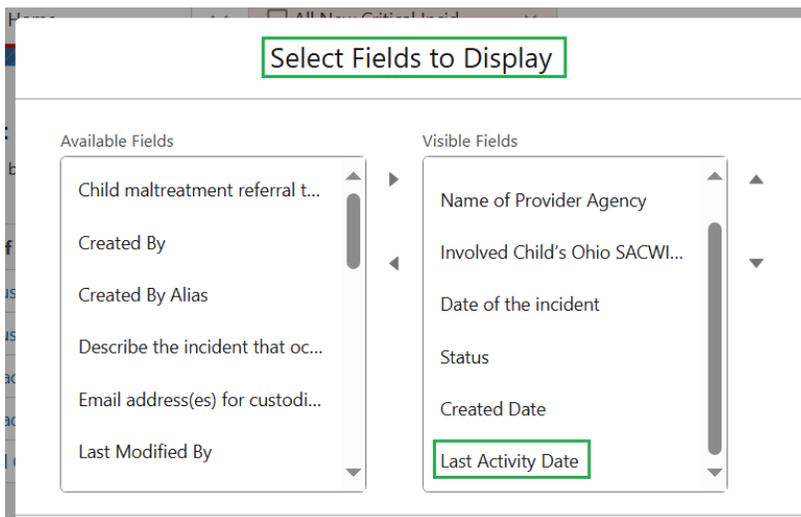


Critical Incident Reports – Filtering Views

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.



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.

Critical Incident Reports – Filtering Views

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

- Name of Provider Agency
- Involved Child's Ohio SACWI...
- Date of the incident
- Status
- Created Date
- Last Activity Date

The Field has been moved.

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

- Name of Provider Agency
- Involved Child's Ohio SACWI...
- Date of the incident
- Status
- Last Activity Date
- Created Date

Cancel Save

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

Critical Incident Reports – Filtering Views

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.

Select Fields to Display

Available Fields

- Created By
- Created By Alias
- Describe the incident that oc...
- Email address(es) for custodi...
- Incident Number
- Last Modified By
- Last Modified By Alias

Visible Fields

- Name of Provider Agency
- Involved Child's Ohio SACWIS ID?
- Date of the incident
- Status
- Last Activity Date
- Created Date

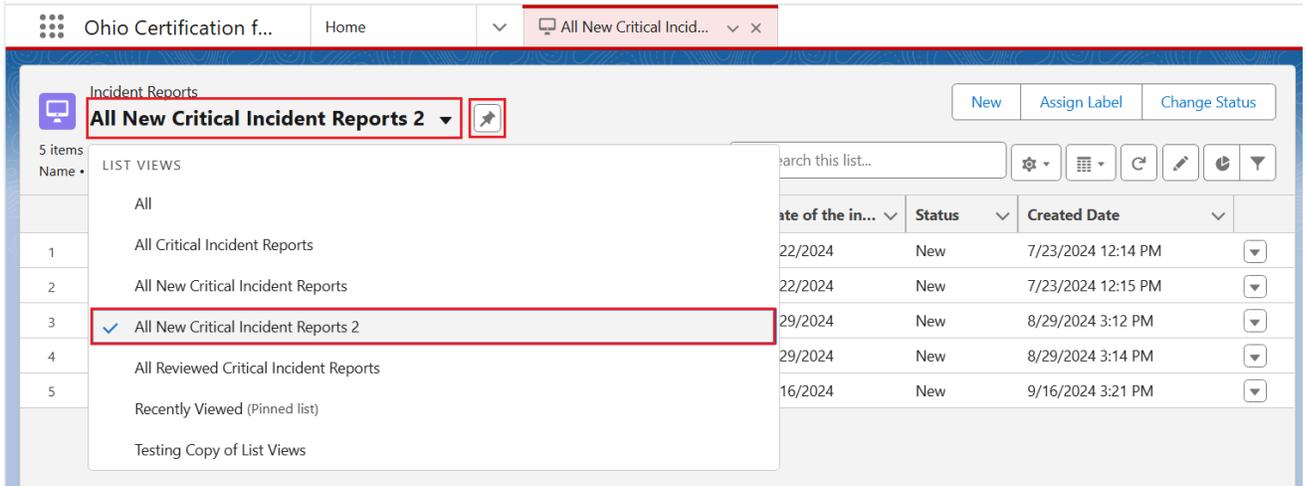
Cancel Save

The Incident Reports screen displays.

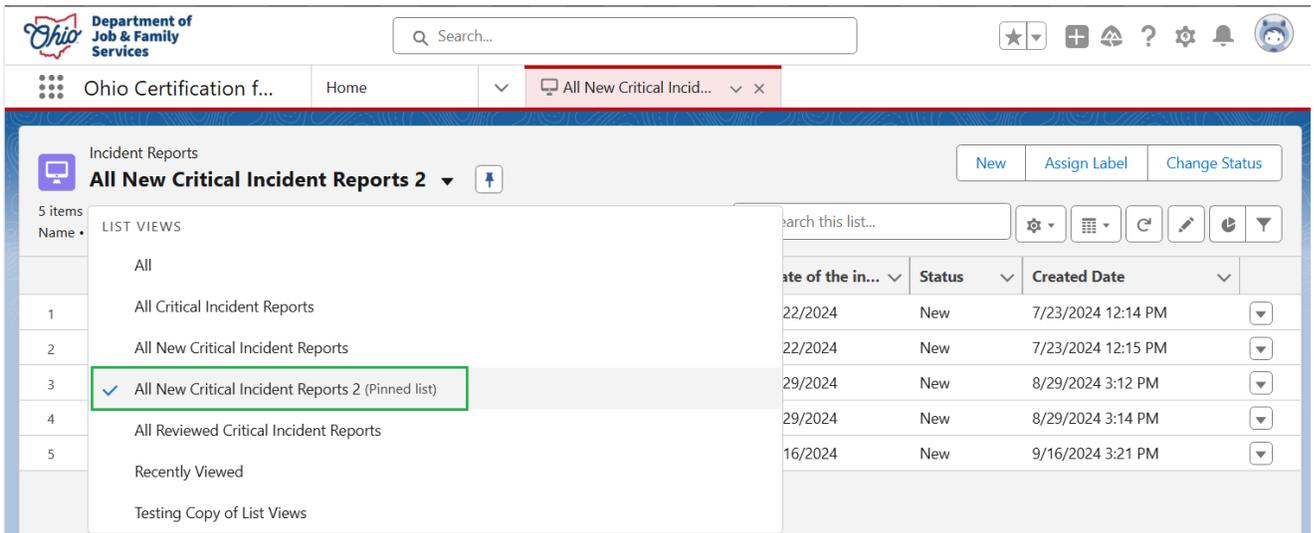
Critical Incident Reports – Filtering Views

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.



The List View is now listed as Pinned List.



If you have additional questions pertaining to this Deployment Communication, please contact the [Customer Care Center](#).