Recording an Activity Log on a Provider Record

Knowledge Base Article

Recording an Activity Log on a Provider Record

Table of Contents

Recording an Activity Log on a Provider Record

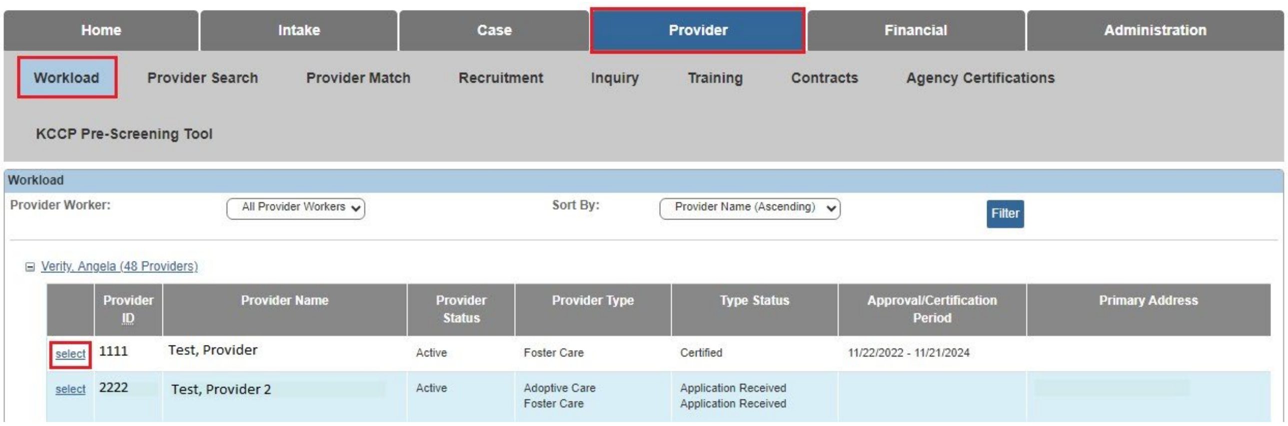
Overview

This article describes how to complete an activity log within a Provider Record. Activity Logs are used to document communications with members of the resource family, placed youth or collateral contacts. These contacts can be for the purposes of home study or kinship care assessment, ongoing licensing and monitoring or tracking how placements are faring in the home.

Important: An activity log can be saved in **Draft** status and the record can be edited until the activity log status is saved as **Completed**.

Navigating to the Activity Log Details Screen

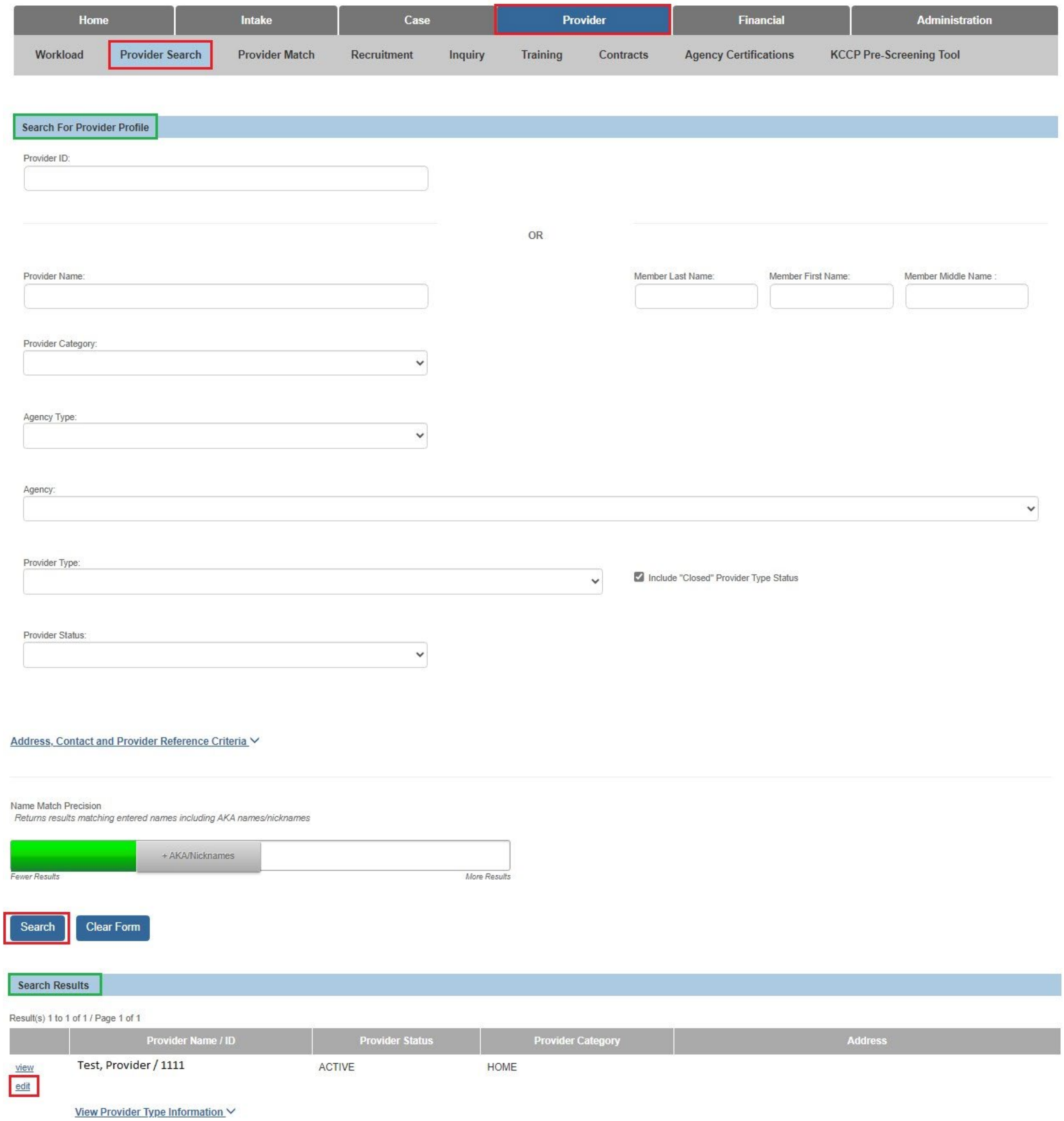
1. From the Ohio SACWIS **Home** screen, click the **Provider Tab**.
2. Click the **Workload** tab and press 'select' next to the desired Provider ID/Name.



Alternatively,

3. Click the **Provider Search** sub-tab.
4. Enter the appropriate search criteria.
5. Click the **Search** button. The results appear in the **Search Results** section of the screen.
6. Click the **Edit** link next to the appropriate provider record.

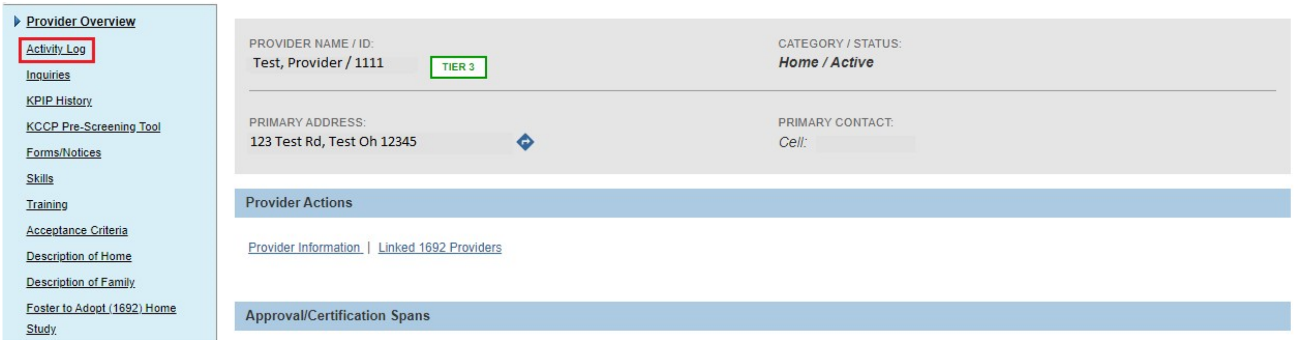
Recording an Activity Log on a Provider Record



The **Provider Overview** screen appears.

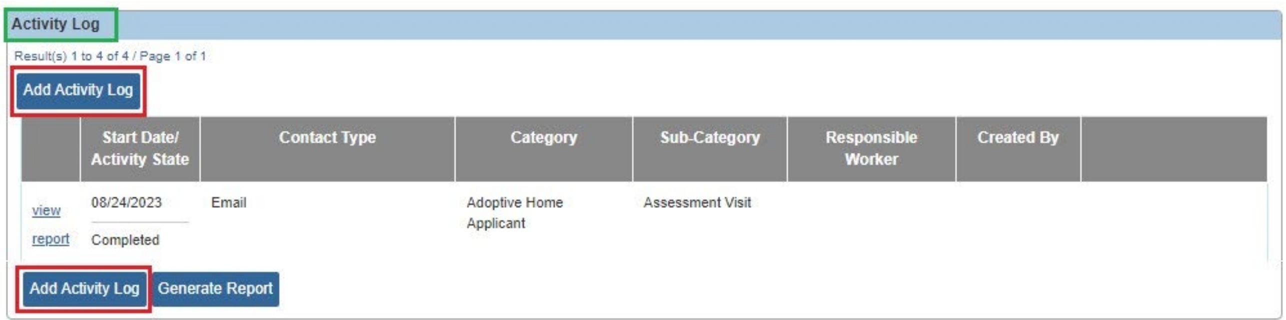
7. Click the **Activity Log** link in the **Navigation** menu on the left.

Recording an Activity Log on a Provider Record



The **Activity Log Filter Criteria** screen appears displaying the **Activity Log** section below it.

1. Click the **Add Activity Log** button at the top of the **Activity Log** list or bottom of the screen.



The **Activity Log Details** screen appears as shown below.

Completing the Activity Log

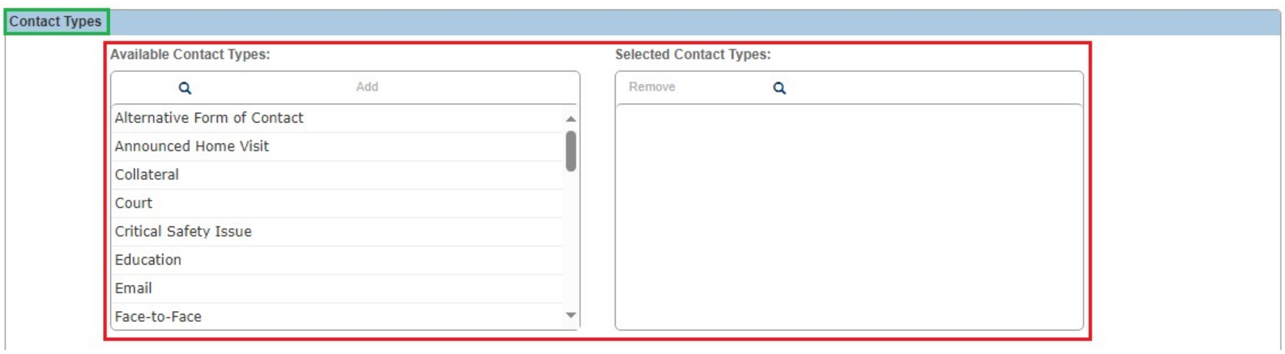
Activity Log Details Section

Choose the **Responsible Worker** from the drop-down list. This will populate from all the employees assigned to the **Provider** record.

1. Enter in the **Originator of Information**, if different from the **Responsible Worker**.
2. In the **Activity Start Date** field, verify that the date is correct. This field automatically populates with the current date but can be changed.
3. Enter an **Activity End Date.**
4. If needed, enter the appropriate time in the **Start Time** field.
   - Entering the time improves sorting capabilities and compliance monitoring.
   - If a start time is entered, an **End Time** must be entered to save the record.

Contact Types Section

5. In the **Contact Types** section, select the most appropriate value(s) in the **Available Contact Types** field.
6. Click the **Add** button. The selection(s) move to the **Selected Contact Types** field.



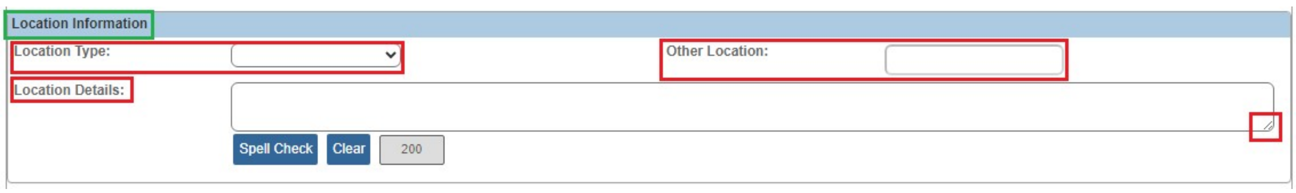
Category Information Section

7. In the **Category Information** section, select a **Contact Duration** (not required, but should be entered if a Start and End Time were not entered).
8. In the **Category** field, select the appropriate value from the drop-down list. Depending on the value selected in the **Contact Type** field, different values display for this selection.
9. In the **Sub-Category** field, select the appropriate value from the drop-down list. Depending on the value selected in the **Category** field, different values display for this selection.
10. If '**Other**' was selected in the **Sub-Category** field, enter in an **Other Sub-Category** value.
11. Select the checkbox for **'High Priority**' or **'Restricted'** if applicable.

- Checking the High Priority box will send a notification email for all users assigned to the Provider Record when the Activity Log is saved or modified, which will note "A High Priority Activity Record has been completed. Provider Name (Last Name, First Name), Provider ID XXXXX."
- Checking the Restricted box can only be done by a worker assigned to the **Provider Record**. When an Activity Log has been marked Restricted, only users assigned to the Provider record may view it.

Location Information Section

12. In the **Location Information** section, select the **Location Type** where the activity took place. Enter an **Other Location** if the **Location Type** of **Other** was chosen. Enter any applicable information in the **Location Details** text box as needed.
13. The bottom right corner of the text box in **Location Details** may be clicked to expand the box into full screen mode, and Spell Check used as desired.



Activity Association Section

14. In the **Activity Association** section, click the **Associate Members** link.

The **Associate Members** screen appears.

15. In the **Associate Members** section, select the check box next to each person who was seen and/or communicated with during the activity.
16. When complete, click the **OK** button.

As shown below, the **Activity Details** screen appears displaying the associated member's name(s) in the **Activity Association** section.

17. If any children placed in the home or residing in the home via a Living Arrangement were involved in the activity, click the **Associate Children** Placed and/or the **Associate Living Arrangements** link.

The **Associated Placed Children** or **Associate Living Arrangements** screen appears.

18. Select the box next to any child involved in the activity being recorded.
19. When complete, click the **OK** button.

As shown below, the **Activity Details** screen appears, displaying the associated child(ren)'s name(s) in the **Activity Association** section.

20. To have this activity log saved on the child's case record as well as on the provider record, click the **Save Note to Child(ren) Record** check box.

Important: Please ensure no other placed youth's identifying information is contained in the activity log when using **Save Note to Child(ren) Record**.

Note: Ohio SACWIS will send a copy of the activity log to each checked youth's case. In the case of siblings placed together, Ohio SACWIS will create a copy for each child, so there will be multiples of the same contact sent to the case.

21. In the **Narrative** field, enter details from the activity being recorded.

22. When all of the activity log fields on the have been completed, change the **Activity State** field status to **Completed**.

Important: As stated previously, an activity log can be saved in **Draft** status and the record can be edited until the activity log status is saved as **Completed**.

23. When complete, users may:

a. Click the **Save** button at the bottom of the screen to commit the activity log to the data base and return to the **Activity Log** List page.

b. Click **Apply** to save the log and remain on the same activity log record.

c. Click **Cancel** to save any unapplied changes and return to the List page.

d. Click **Delete** to delete the entire activity log record.

e. Click **Previous** to view the previous activity log record.

f. Click **Next** to move to the next activity log record in the list.

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