

Generating the Agency Safety Plan Report



Knowledge Base Article

Generating the Agency Safety Plan Report

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Generating the Agency Safety Plan Report

Overview

This article describes how to generate the **Agency Safety Plan Report**. The **Agency Safety Plan Report** is a tool for administrators, supervisors, and workers to help manage the **Active** safety plans for their agency. The report offers 2 options.

Option 1 allows the user to generate a report showing all safety plans that were active for the agency for at least one day during the selected parameter period.

Option 2 allows user to generate a report of all current active safety plans for the agency.

Navigating to the Report

1. From the Ohio SACWIS **Home** screen, click the Administration tab.
2. Click the hyperlink for **Agency Safety Plan Report**.

The screenshot shows the Ohio SACWIS Administration tab interface. The 'Administration' tab is highlighted in blue. Below it, the 'Reports' sub-tab is also highlighted in blue. The 'Report Filter Criteria' section shows 'Report Category' and 'Report Type' dropdown menus. The 'Reports' table lists various reports, with 'Agency Safety Plan Report' highlighted in blue and its title cell circled in red.

Title	Category	Type
AA Casino Waiver Requests Report *	Fiscal	Agency
AAC Outreach Letter	Fiscal	State
AAC Outreach Report	Fiscal	State
Agency Provider Waiver Report	Administration	State
Agency Safety Plan Contacts Report	Administration	Agency
Agency Safety Plan Report	Administration	Agency
Agency Temporary License Report	Administration	Agency
Assessor Registry Report	Administration	Agency

The **Report Details** screen appears.

3. View a saved report by clicking the **Report ID** hyperlink.
4. Select a **Report Output Format** of PDF or Excel.
5. Create a new report by clicking the **Generate Report** button.

Generating the Agency Safety Plan Report

Administration > Reports

Report Details

Report Category: ADMINISTRATION Report Title: Agency Safety Plan Report
Report Type: AGENCY

Report History

ID	Date Created	Employee ID	Name
35870718 	09/24/2023 10:59 AM		

Document History

Select Report Output Format

PDF
 Excel

Generate Report

Cancel

The **Active Safety Plan Report** parameter screen appears.

Agency Safety Plan Report

Filter Options Applicable to Option 1 and Option 2

Agency: *

Supervisor:

Employee:

Option 1 - Generate report for all safety plans for the agency that were active for at least one day during the selected parameter period.

Note: Only Safety Plans with an existing Effective Date or End Date will be included in this report. (ie. Safety Plans with a status of In Progress, Complete, or Refused may not be included in this report.)

Effective Date: * 

End Date: * 

Option 2 - All selections from Option 1 will be negated.

Generate report for all current active safety plans for agency

Generate Report **Cancel**

Generating the Agency Safety Plan Report – Option 1

This report option generates all **Safety Plans** that were **Active** for the agency for at least one day during the selected parameter period.

Generating the Agency Safety Plan Report

Important: Only **Safety Plans** with an existing **Effective Date** or **End Date** will be included in this report. (I.e. **Safety Plans** with a status of **In Progress**, **Complete**, or **Refused** may not be included in this report as they are not considered '**Active**').

1. Select the **Agency**.

Note: Only the county of the logged in user will appear in the **Agency** dropdown.

2. Select the **Supervisor**, if needed.
3. Select the **Employee**, if needed.
4. Enter the **Effective Date** (required).
5. Enter the **End Date** (required).

Agency Safety Plan Report

Filter Options Applicable to Option 1 and Option 2

Agency: *
Supervisor:
Employee:

Option 1 - Generate report for all safety plans for the agency that were active for at least one day during the selected parameter period.

Note: Only Safety Plans with an existing Effective Date or End Date will be included in this report. (I.e. Safety Plans with a status of In Progress, Complete, or Refused may not be included in this report.)

Effective Date: *
End Date: *

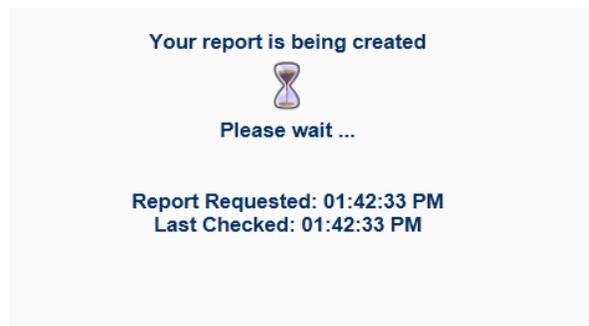
Option 2 - All selections from Option 1 will be negated.

Generate report for all current active safety plans for agency

Generate Report Cancel

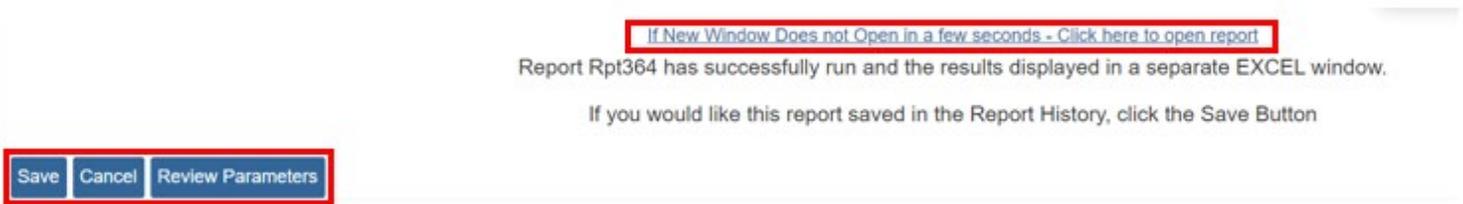
6. Click the **Generate Report** button.

The **Your report is being created** message appears while the report is generating.



Generating the Agency Safety Plan Report

The **Report Confirmation** screen appears when the report has run successfully.



7. If the report does not open, select the **Click here to open report** link.
8. Click the **Save** button in order to save the generated report to the **Report History**.
9. Select **Review Parameters** to return to the **Report Parameters** screen.

The **Agency Safety Plan Summary Report** appears.

Generating the Agency Safety Plan Report – Option 2

This report option generates all **Current Active Safety Plans** for the agency.

1. Select the **Agency**.
Note: Only the county of the logged in user will appear in the **Agency** dropdown.
2. Check the **Generate for all active safety plans for agency** box.

Generating the Agency Safety Plan Report

Agency Safety Plan Report

Filter Options Applicable to Option 1 and Option 2

Agency: *

Supervisor:

Employee:

Option 1 - Generate report for all safety plans for the agency that were active for at least one day during the selected parameter period.

Note: Only Safety Plans with an existing Effective Date or End Date will be included in this report. (ie. Safety Plans with a status of In Progress, Complete, or Refused may not be included in this report.)

Effective Date: *

End Date: *

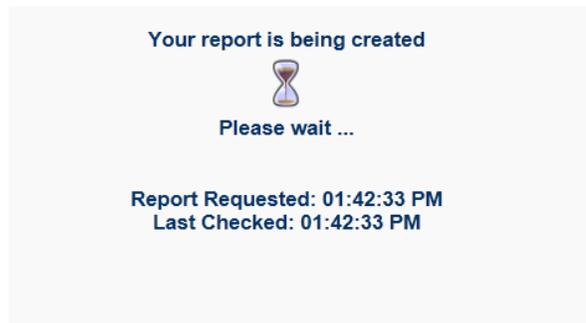
Option 2 - All selections from Option 1 will be negated.

Generate report for all current active safety plans for agency

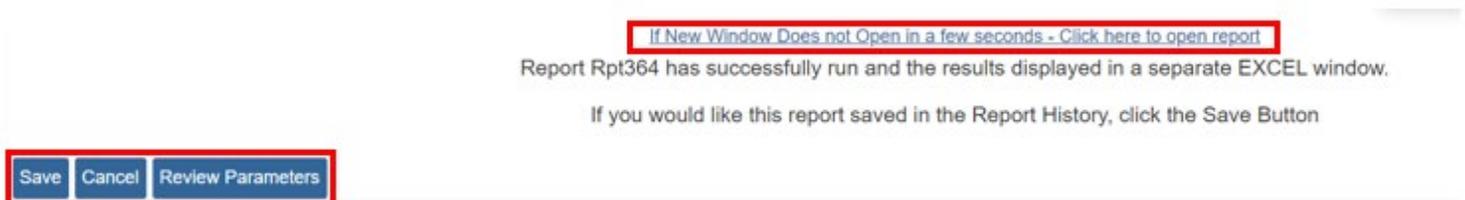
Generate Report Cancel

3. Click the **Generate Report** button

The **Your report is being created** message appears while the report is generating.



The **Report Confirmation** screen appears when the report has run successfully.



Generating the Agency Safety Plan Report

4. If the report does not open, select the **Click here to open report** link.
5. Click the **Save** button in order to save the generated report to the **Report History**.
6. Select **Review Parameters** to return to the **Report Parameters** screen.

The **Agency Safety Plan Summary Report** appears.

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