

Generating the Agency Safety Plan Contacts Report

Overview

This article describes how to generate the **Agency Safety Plan Contacts Report**. The system provides two options for generating this report.

- **Option 1** – The report will display all **Participants** of selected **Safety Plans** that were active for at least one day during a particular parameter period (date range) specified by the user. The report will select Safety Plans that have an **Effective Date** and/or **End Date** that falls during the parameter period, and which also have a Status of **Effective**, **Effective-Finalized**, or **Discontinued**.
- **Option 2** – The report that will display all **Participants** in current active **Safety Plans** where the **Status** of the Safety Plan is **Effective** or **Effective-Finalized**.

Complete the following steps to generate the report.

Navigating to the Report Parameters Page

The Agency Safety Plan Contacts Report can be accessed through the **Administration > Reports** tabs in SACWIS.

1. On the SACWIS **Home** screen, click the **Administration** tab.
2. Click the **Reports** tab. The **Reports** screen displays.

The screenshot shows the SACWIS interface. At the top, there is a navigation bar with tabs: Home, Intake, Case, Provider, Financial, and Administration. The Administration tab is circled in red. Below this is a sub-navigation bar with tabs: Staff, Maintenance, Security, Reports, Training, and Utilities. The Reports tab is also circled in red. Below the navigation bars is a 'Report Filter Criteria' section with two dropdown menus: 'Report Category:' and 'Report Type:'. Below this is a 'Filter' button and a 'Reports' tab, both circled in red. The main content area shows a table with the following data:

Title	Category	Type
AA Ceiling Waiver Requests Report - RPT 406	Fiscal	Agency
AFCARS Exception Report - RPT 252	Fiscal	Agency
AFCARS Exception Summary Report - RPT 396	Administration	Agency

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- The report is currently listed on Page 1 of the **Reports** list. Click the **Agency Safety Plan Contacts Report** hyperlink.

Agency Placement Cost Report - RPT 320	Fiscal	Agency
Agency Safety Plan Contacts Report-RPT 394	Administration	Agency
Agency Safety Plan Report	Administration	Agency
Attempted Visits vs. Actuals	Case	Worker
Benefits Report - RPT 249	Fiscal	Agency
Case Draft Activity Log Report	Case	Agency
Case Load Summary	Administration	Worker
Case Opening Analysis	Case	
Case Reopening Report	Case	Agency
Case Services Report	Case	Worker
Caseload Data Report	Administration	Supervisor
Certification Activity Report/Provider Summary Requirements	Provider	Unit
Children In Placement	Case	Agency
Children Needing Permanency	Case	Agency
Client Characteristics Report	Case	Worker
Client Characteristics by Worker Report	Case	Unit

Results Page: **1** | 2 | 3 | 4 | » | ⌂

The **Report Details** screen appears.

Report Details

Report Category: ADMINISTRATION Report Title: Agency Safety Plan Contacts Report-RPT 394
Report Type: AGENCY

Report History

ID	Date Created	Employee ID	Name
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Document History

Select Report Output Format

PDF
 Excel

Generate Report

- In the **Select Report Output Format** section, select **PDF** or **Excel** as the report format. **Excel** is pre-selected.

- Click the **Generate Report** button.

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The **Agency Safety Plan Contacts Report** parameters screen appears. The user's **Agency** is pre-selected.

Agency Safety Plan Contacts Report

Filter Options Applicable to Option 1 and Option 2

Agency: *

Agency Unit:

Supervisor:

Employee:

Option 1 - Generate report for all safety plan participants on an active safety plan for at least one day during the selected parameter period.

Note: Only Safety Plans with an existing Effective Date or End Date where the safety plan was effective or Effective-Finalized during the parameter period selected will be included in this report.

Effective Date: *

End Date: *

Option 2 - Generate report for all safety plan participants who are on an active safety plan as of today's date.

* Generate report for participants who are on a current and active safety plan for your agency. This includes safety plans that are Effective and Effective-Finalized only.

Generate Report Cancel

Selecting the Report Parameters

There are two **Options** for generating the **Agency Safety Plan Contacts Report**.

Note: Both options allow the user to filter the data to a specific **Agency Unit** / **Supervisor** / **Employee**, if desired.

Option 1 – This option requires the user to enter a parameter period (**Effective Date** through **End Date**) for the report. The report will display all **Participants** of **Safety Plans** that meet the following criteria:

- The Safety Plan was **Active** for at least one day during the specified parameter period, AND
- The Safety Plan has an **Effective Date** and/or **End Date** that falls within the specified parameter period, AND
- The Safety Plan's **Status** was **Effective**, **Effective-Finalized**, or **Discontinued** during the specified parameter period.

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Option 2 – The report will display all **Safety Plan Participants** who meet the following criteria:

- Participant is on an **Active Safety Plan** as of the day the report is generated (i.e., the current date), AND
- The Safety Plan's **Status** is **Effective** or **Effective-Finalized**.

Generating the Report

On the **Agency Safety Plan Contacts Report** parameters screen:

1. If you wish to limit the report data to a specific unit or supervisor or employee, select the **Agency Unit**, then select the **Supervisor** (if desired), then select the **Employee** (if desired). (Optional)

Agency Safety Plan Contacts Report

Filter Options Applicable to Option 1 and Option 2

Agency: *

Agency Unit :

Supervisor:

Employee:

Option 1 - Generate report for all safety plan participants on an active safety plan for at least one day during the selected parameter period.

Note: Only Safety Plans with an existing Effective Date or End Date where the safety plan was effective or Effective-Finalized during the parameter period selected will be included in this report.

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- If you wish to generate the **Option 1** version of the report, enter the desired **Effective Date** and **End Date** to specify the parameter period for the report. (Required if not using **Option 2**)

Option 1 - Generate report for all safety plan participants on an active safety plan for at least one day during the selected parameter period.

Note: Only Safety Plans with an existing Effective Date or End Date where the safety plan was effective or Effective-Finalized during the parameter period selected will be included in this report.

Effective Date: * 

End Date: * 

Option 2 - Generate report for all safety plan participants who are on an active safety plan as of today's date.

Generate report for participants who are on a current and active safety plan for your agency. This includes safety plans that are Effective and Effective-Finalized only.

- OR if you wish to generate the **Option 2** version of the report, click on the checkbox: **Generate report for participants who are on a current and active safety plan for your agency. This includes safety plans that are Effective and Effective-Finalized only.** (Required if not using **Option 1**)

Note: If **Option 2** is selected, then any dates entered for **Option 1** will be negated.

Option 1 - Generate report for all safety plan participants on an active safety plan for at least one day during the selected parameter period.

Note: Only Safety Plans with an existing Effective Date or End Date where the safety plan was effective or Effective-Finalized during the parameter period selected will be included in this report.

Effective Date: * 

End Date: * 

Option 2 - Generate report for all safety plan participants who are on an active safety plan as of today's date.

Generate report for participants who are on a current and active safety plan for your agency. This includes safety plans that are Effective and Effective-Finalized only.

- Click the **Generate Report** button.

The report displays in the format you specified. The example on the next page shows the Excel version of the report.

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Agency Safety Plan Contacts Report Example

Agency Safety Plan Contacts Report				
Agency Name : [REDACTED]				
Parameter Dates : 04/01/2016 to 04/25/2016				
Date of Report : 04/25/2016				
Person ID	Safety Plan Participant	Case ID	Safety Plan ID	Safety Plan Effective Date
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	01/11/2008
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	01/11/2008
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	01/11/2008

Report example, continued:

Safety Plan Discontinued Date	Safety Plan Response	Contact Dates and Types F=Face to Face P=Phone	Next Contact Due	Safety Plan Discontinued Reason
		02/26/2014(F); 02/19/2014(F); 02/03/2014(F); 12/18/2013(F)	04/25/2016(F)	New Safety Plan Completed
		02/26/2014(F); 02/19/2014(F); 12/18/2013(F); 10/16/2013(F)	04/25/2016(F)	New Safety Plan Completed
		04/03/2013(F); 02/07/2013(P); 01/16/2013(F); 12/21/2012(F)	04/25/2016(F)	New Safety Plan Completed

Report example, continued:

Notified of Discontinuation	Date Notified of Discontinuation	Agency Unit	Supervisor Name	Employee Name
Yes		Intake	[REDACTED]	[REDACTED]
Yes		Intake	[REDACTED]	[REDACTED]
Yes		Intake	[REDACTED]	[REDACTED]

Understanding the Report

- In the **Safety Plan Participant** column, **(C)** denotes a **Child**:

Person ID	Safety Plan Participant	Case ID	Safety Plan ID	Safety Plan Effective Date
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	01/11/2008
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	01/11/2008
[REDACTED]	Princess Little (C)	[REDACTED]	[REDACTED]	01/11/2008

Generating the Agency Safety Plan Contacts Report

- Activity Log contacts count when the following criteria are met:
 - The Safety Plan Participant's **Contact Status** is marked **Complete** on an Activity Log, AND
 - That Activity Log's **Contact Type** is **Face to Face**, **Phone Call From**, or **Phone Call To**, AND
 - The **Activity Date** falls between the **Safety Plan Effective Date** and the **Safety Plan Discontinued Date**, AND
 - The Activity Log's **Status** is **Completed**.
- In the **Contact Dates and Types** column and the **Next Contact Due** column, **(F)** denotes a **Face to Face** contact and **(P)** denotes a **Phone** contact:

Safety Plan Response	Contact Dates and Types F= Face to Face P=Phone	Next Contact Due
	02/26/2014(F); 02/19/2014(F); 02/03/2014(F); 12/18/2013(F)	04/25/2016(F)
	02/26/2014(F); 02/19/2014(F); 12/18/2013(F); 10/16/2013(F)	04/25/2016(F)
	04/03/2013(F); 02/07/2013(P); 01/16/2013(F); 12/21/2012(F)	04/25/2016(P)

- When a **Face to Face** contact and a **Phone Call** contact fall on the same date, the report will always display the **Face to Face** contact (not the Phone Call).
- The **Contact Dates and Types** column will only display the last 4 contacts:

Contact Dates and Types F= Face to Face P=Phone
02/26/2014(F); 02/19/2014(F); 02/03/2014(F); 12/18/2013(F)

- In the **Next Contact Due** column:
 - The next **Contact Due Date** will display if an Activity Log is found.
 - The current date will display if no Activity Log is found and the Safety Plan Contact is more than 7 days overdue.
 - **N/A** will display if the Safety Plan is **Discontinued**.
- The report is sorted by **Safety Plan ID**.

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