

Navigating Action Items



Knowledge Base Article

Navigating Action Items

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Navigating Action Items

Overview

This article describes how to navigate the new Activity Stream functionality, specific to **Action Items**. Action Items show work that needs to be completed based on your assignment and role.

Understanding Action Items from the Home Page

Note: Action Items replaced the previous Ticklers, and follow the same business process, providing guidance on Work items due. Action Items display based on assignment and role.

When an employee logs into the Ohio SACWIS Home screen, the page defaults to **Alerts**.

1. Click the **Action Items** tab to the right of **Alerts**.



The **Action Items** screen appears. Action Item “Buckets,” or categories, display across the top of the page.

Action Item Buckets include:

- Assessment/Investigation
- Ongoing/Adoption
- Visitation
- Provider
- General

Up to five Action Item Buckets may display, based on assignments and role. For example, if you (or your subordinate team members) do not have Provider assignments, the Provider bucket will not display. Each Bucket will display only if the logged-in user has current Action Items within that category.

Within the Bucket, each number represents the total number of Action Items within that category which are either past due or coming due. Past Due items are depicted in red text. Upcoming items are in blue text.

The **Action Items** selection defaults to the top left set of Action Items in the first Bucket. Past Due items, if any, will always display to the left of Upcoming items. Click on any of the available Past Due or Upcoming selections within any Bucket to view that specific set of Action Items.

Navigating Action Items

The user has the option to add Custom Action Items to any Bucket by using the, “Add Custom Action Item For...” button located below the Buckets. This functionality is discussed later under the heading, “Adding a Custom Action Item.”

Caseworker Action Items Bucket view:

The screenshot shows a navigation menu with tabs for Home, Intake, Case, Provider, Financial, and Administration. Below this is a sub-menu with Alerts, Action Items (selected), Approvals, and Assignments. The main content area displays five buckets: Assessment / Investigation, Ongoing / Adoption, Visitation, Provider, and General. Each bucket shows counts for Past Due and Upcoming items. A button labeled 'Add Custom Action Item For...' is highlighted with a green box at the bottom.

Assessment / Investigation	Ongoing / Adoption	Visitation	Provider	General
3 PAST DUE, 8 UPCOMING	1 PAST DUE, 8 UPCOMING	1 PAST DUE, 9 UPCOMING	1 PAST DUE, 10 UPCOMING	1 PAST DUE, 3 UPCOMING

Buttons: Add Custom Action Item For...

Supervisor Action Items Bucket view:

For unit Supervisors, each **Action Item** Bucket is divided into **Team** and **Self** categories.

- **Team** displays the number of **Past Due** and **Upcoming** Action Items for which the Supervisor’s Team Members are responsible.
- **Self** displays the number of **Past Due** or **Upcoming** Action Items for which the Supervisor is directly responsible based on his/her own assignment and role.

Below the Buckets, the Supervisor has the following buttons available, which are discussed later in this article:

- **View Team Members Items...**
- **Add Custom Action Items For...**
- **Dismiss Action Items**

The screenshot shows the same navigation menu as the Caseworker view. The sub-menu has Alerts, Action Items (selected), Approvals, and Assignments. The main content area displays five buckets, each with sub-sections for TEAM and SELF. Each sub-section shows counts for Past Due and Upcoming items. Three buttons are highlighted with green boxes at the bottom: 'View Team Member Items...', 'Add Custom Action Item For...', and 'Dismiss Action Items'.

Assessment / Investigation	Ongoing / Adoption	Visitation	Provider	General
TEAM: 6 PAST DUE, 14 UPCOMING SELF: 3 UPCOMING	TEAM: 4 PAST DUE, 15 UPCOMING SELF: 1 PAST DUE, 7 UPCOMING	TEAM: 7 PAST DUE, 115 UPCOMING SELF: 2 PAST DUE, 4 UPCOMING	TEAM: 3 PAST DUE, 13 UPCOMING SELF: 1 PAST DUE	TEAM: 2 PAST DUE, 12 UPCOMING SELF: 2 PAST DUE, 1 UPCOMING

Buttons: View Team Member Items..., Add Custom Action Item For..., Dismiss Action Items

The selected list set of **Action Items** displays on the lower section of the page.

Navigating Action Items

Action Items Display

A blue bar specifies which Action Items are included in the selected list set. In the example below, **Past Due Assessment/Investigation Items** are displayed.



Note: If a Priority has been set for an Action Item, the Priority status will appear immediately before the item.

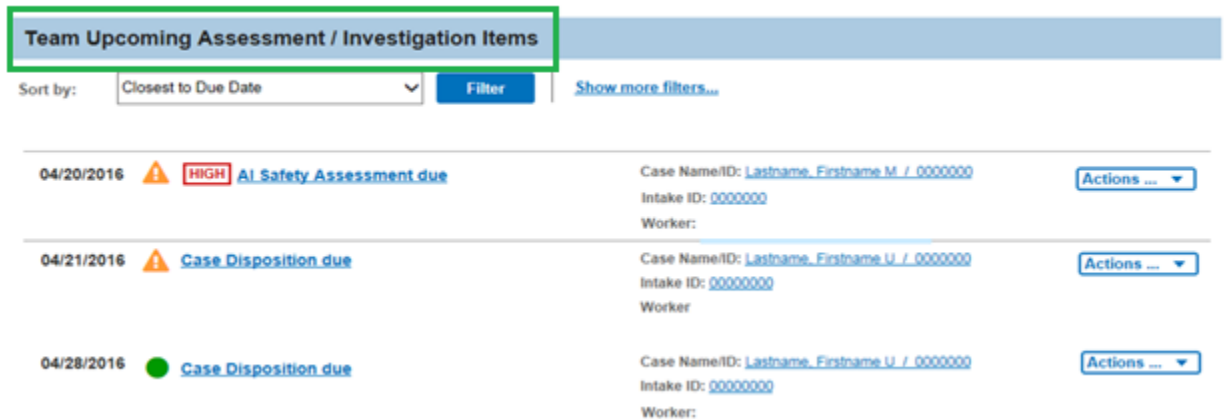
Past Due Action Items display with the  icon to signify the work item is overdue.



The screenshot shows a list titled "Past Due Assessment / Investigation Items". At the top, there is a blue header bar with the title. Below the header, there is a "Sort by:" dropdown menu set to "Furthest from Due Date", a "Filter" button, and a "Show more filters..." link. The list contains two items:

Due Date	Priority	Action Item	Case Name/ID	Intake ID	Actions
04/01/2016	HIGH	Case Disposition due	Case Name/ID: Lastname, Firstname M. / 0000000	Intake ID: 0000000	Actions ...
04/03/2016	MED	Family Assesment due	Case Name/ID: Lastname, Firstname U. / 0000000	Intake ID: 0000000	Actions ...

Upcoming Action Items display with the  icon to signify the work item will be due or the  icon to signify a work item is nearing its due date.



The screenshot shows a list titled "Team Upcoming Assessment / Investigation Items". At the top, there is a blue header bar with the title. Below the header, there is a "Sort by:" dropdown menu set to "Closest to Due Date", a "Filter" button, and a "Show more filters..." link. The list contains three items:

Due Date	Priority	Action Item	Case Name/ID	Intake ID	Worker	Actions
04/20/2016	HIGH	AI Safety Assessment due	Case Name/ID: Lastname, Firstname M. / 0000000	Intake ID: 0000000	Worker:	Actions ...
04/21/2016		Case Disposition due	Case Name/ID: Lastname, Firstname U. / 0000000	Intake ID: 0000000	Worker	Actions ...
04/28/2016		Case Disposition due	Case Name/ID: Lastname, Firstname U. / 0000000	Intake ID: 0000000	Worker:	Actions ...

The **Due Date** for each Action Item is displayed on the left. The Action Item message is a hyperlink to the page where the work item can be completed.





For Visitation Action Items, a **Location/Contact** link displays below the message. Click the link to display the Address and Contact information for the child's placement or living arrangement, if applicable. Otherwise, the child's primary address and contact display.

Navigating Action Items

Identifiers (specific to each action item, as applicable), include:

- **Case Name/ID**
- **Intake ID**
- **Person Name/ID**
- **Provider Name/ID**

The identifiers are hyperlinks to the Case/Provider/Person/Intake to which the Action Item applies.

Team Upcoming Assessment / Investigation Items			
Sort by:	Closest to Due Date	Filter	Show more filters...
04/20/2016	 HIGH AI Safety Assessment due	Case Name/ID: Lastname, Firstname M / 0000000 Intake ID: 00000000 Worker:	Actions ...
04/21/2016	 Case Disposition due	Case Name/ID: Lastname, Firstname U / 0000000 Intake ID: 00000000 Worker:	Actions ...
04/22/2016	 Safety Plan Signatures not obtained	Case Name/ID: Lastname, Firstname W / 0000000 Intake ID: 00000000 Worker:	Actions ...
04/27/2016	 HIGH AR Safety Assessment due	Case Name/ID: Lastname, Firstname M / 0000000 Intake ID: 00000000 Worker:	Actions ...

Viewing Team Member Items

The **View Team Member Items** button is available *only for unit Supervisors*. Clicking the View Team Member Items button allows the Supervisor to filter for Action Items by a specific **Team Member** and view the **Past Due** and **Upcoming** Action Items for that individual worker.

1. Click **View Team Member Items**.
2. Click the **Team Member** name you wish to view.

Navigating Action Items

The screenshot shows the SACWIS interface with the 'Action Items' tab selected. At the top, there are navigation tabs: Alerts, Action Items (selected), Approvals, and Assignments. Below these are five columns representing different categories: Assessment / Investigation, Ongoing / Adoption, Visitation, Provider, and General. Each column displays counts for 'PAST DUE' and 'UPCOMING' items for both 'TEAM' and 'SELF'. A dropdown menu labeled 'View Team Member Items...' is highlighted with a red circle. Below it, a list of team members is shown, with 'Lastname, Workername B' selected and also highlighted with a red circle. Other buttons like 'Add Custom Action Item for...', 'Generate Report', and 'Dismiss Action Items' are visible.

The Supervisor is directed to the selected Team Member’s Action Items with the following message: *“You are viewing these action items as (Caseworker last name, first name, and middle initial).”*

The following two options are located in the right corner of the displayed Team Member’s **Action Items** screen:

1. **Return to Your Action Items:** Selecting this option returns the Supervisor to *their* Home Action Items page.
2. **View Team Member Items:** Selecting this option provides the Supervisor the opportunity to view the Action Items page of *another individual worker*.

This screenshot shows the SACWIS interface after navigating to a specific team member's action items. A yellow banner at the top states 'You are viewing these action items as' followed by the team member's name. Two buttons in the top right corner are circled in red: 'Return to Your Action Items' and 'View Team Member Items'. Below the banner, there are navigation tabs (Alerts, Action Items, Approvals, Assignments) and a summary of action items by category. A 'Filter' button and 'Show more filters...' link are present. The main content area shows a list of 'Past Due Assessment / Investigation Items' with columns for date, status, and case name.

Adding Custom Action Items

Custom Action Items, prior to the new functionality, were called *Ad Hoc Ticklers*. A Custom Action Item allows users to create reminders to complete tasks for which SACWIS does not automatically generate Action Items.

- A Custom Action Item may be created independent of a specific Assignment. These will only display on the Home Action Items page, not on any Case or Provider Overview.

Navigating Action Items

- A Custom Action Item can also be associated to a specific Case, Provider, or Person, if desired. If a Custom Action Item is associated to a specific assignment, it will display on the applicable Case or Provider Overview, as well as on the Home page.
- Whether viewing the Home Action Items page or a Case or Provider Overview, a Custom Action Item will only display for the user who created it, or for the person for whom it was created by the Supervisor.
- Users have the option to add a Custom Action Item to any Bucket.

To add the Custom Action Item:

1. Click, **Add Custom Action Item For...**
2. Select the appropriate **Bucket** from the drop-down list.

The screenshot displays the SACWIS dashboard with a navigation bar at the top containing tabs for 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 four columns representing different categories: Assessment / Investigation, Ongoing / Adoption, Visitation, and General. Each column shows counts for 'TEAM' and 'SELF' under 'Past Due' and 'Upcoming' status. A dropdown menu is open over the 'Add Custom Action Item For...' button, listing the categories: Assessment / Investigation, Ongoing / Adoption, Visitation, Provider, and General. The 'Assessment / Investigation' and 'Ongoing / Adoption' options are circled in red.

The user is directed to **The Custom Action Items Details** page to create the Action Item.

3. Enter the Action Item **Due Date**.
4. Note: The Action Item **Display Date** defaults to the current date but can be changed if desired. The Display Date is the date on which the Custom Action Item will begin to display in SACWIS.
5. Select the **Category (Bucket)** where the **Action Item** is to display. The **Category** is pre-populated with the previous selection (Step 2), but the selection can be changed, if necessary.
6. Enter the **Message** to display (i.e., Complete referrals for service linkages).

Navigating Action Items

Home > Desktop > Action Items
Add - Custom Action Item

Custom Action Item Details

Due Date:

Category: Assessment / Investigation

Assignment Type:

Assignments:

Allow worker to decline this action item

Message:

To associate an **Action Item** to a specific Case, Provider, or Person:

Select the **Assignment Type** from the drop-down menu.

Select the **Assignments** from the drop-down list of assignments. Options in the **Assignments** drop-down are based on **the Assignment Type** selected. For example, if the Assignment Type is Case, a list of Cases to which the worker is assigned will be available for selection in the **Assignments** drop-down.

Click **Save**.

Add - Custom Action Item

Custom Action Item Details

Due Date:

Category: Assessment / Investigation

Assignment Type:

Assignments:

Allow worker to decline this action item

Message:

Below is an example of a **Custom Action Item** created by a Caseworker. It exemplifies how the Custom Action Item displays as an Upcoming Action Item due on the Home page.

Note: A Custom Action Item will display with the gray **Custom** badge next to it.

Navigating Action Items



The **Custom Action Item** will continue to display until it is manually dismissed.

Note: When a **Supervisor** is viewing Team Member Items for an individual worker, and selects **Add Custom Action Item For**, the Custom Action Item is created *for the individual worker*. The Supervisor has the option to select the checkbox “Allow worker to dismiss this action item.” *If this checkbox is selected, the worker can dismiss the Custom Action Item. Otherwise, only the Supervisor can dismiss it.* Refer to “Dismissing Action Items” section below.



Dismissing Action Items

A Supervisor, or other individual(s) with the required security profile, can manually dismiss Action Items. Any user can dismiss the **Custom Action Items** they create. Security profiles are at the discretion of each agency.

1. Click the **Dismiss Action Items** button.



Navigating Action Items

The Supervisor will be directed to the **Action Item Dismissal Search Criteria** page to select a specific Action Item(s) to dismiss. The Agency, Unit, Supervisor and Employee fields will be pre-populated, as well as a list of the Employee's Action Items. Selection of an Action Item Type, Associated Item ID, and/or Message is optional.

2. If you made changes to the selections, click **Search** to yield results.

Home Intake Case Provider Financial Administration

Staff Maintenance Security Reports Training Utilities

Agency Information
Unit & Supervisor
Action Items
Action Items Overview
Standard Message
Case Information

Action Item Dismissal Search Criteria

Agency: [Administrative] Unit: [Administrative]

Supervisor: [] Employee: []

OR

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

Action Item Message: []

Search

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

Action Item Dismissal Search Results

Result(s) 1 to 2 of 2 / Page 1 of 1

Select	Custom	Work Item Type	Work Item ID	Work Item Ref.	Code	Person Name	Message	Due Date	Mandatory
<input checked="" type="checkbox"/>	NO	PROVIDER		PROVIDER	RM30_ADPT_FC_HM_STDY_DUE		Adoptive/Foster Care Home Study Due	10/02/2016	YES
<input type="checkbox"/>	YES	PROVIDER		PROVIDER	PROVIDER		This is a test	02/25/2017	NO

Dismiss Close

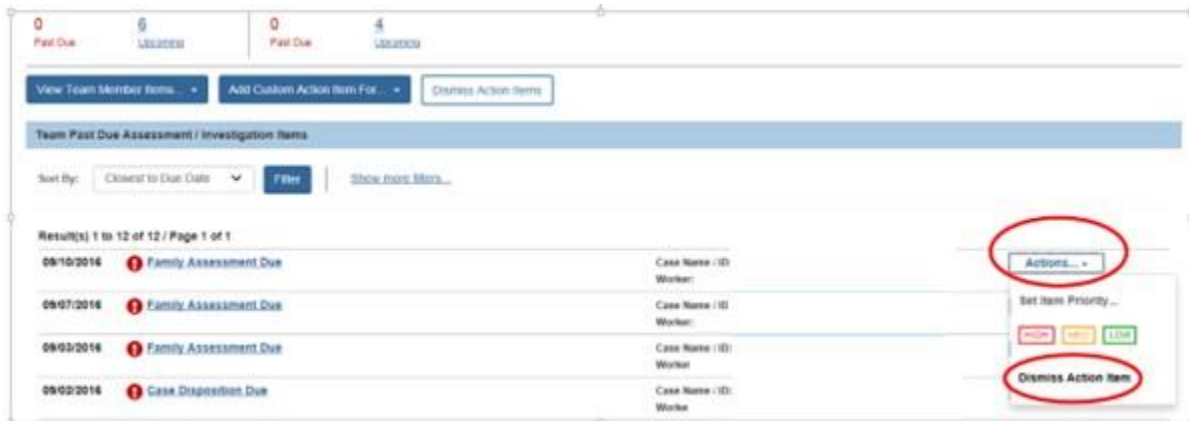
3. Click the **box beside the item(s)** to be dismissed.
4. Click the **Dismiss** button.

Navigating Action Items

An **Action Item** can also be dismissed from the **Actions** drop-down menu beside the Action Item. The Actions menu displays when the logged in user is a Supervisor.

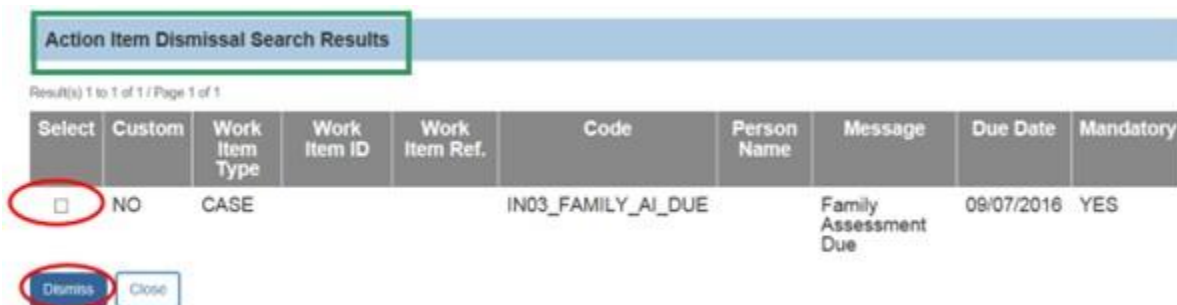
All workers will see the **Actions Menu** beside **Custom Action Items**, which they can dismiss themselves. This includes those created by the worker, as well as those created for the worker by the Supervisor when the Supervisor selected the option to allow the worker to dismiss the Custom Action Item.

5. Determine what Action Item should be deleted.
6. Click on the Actions drop-down menu.
7. Select **Dismiss Action Item** from the Actions drop-down menu.



The **Action Item Dismissal Search Results** page appears.

8. Click the box beside the item to be dismissed.
9. Click the **Dismiss** button.

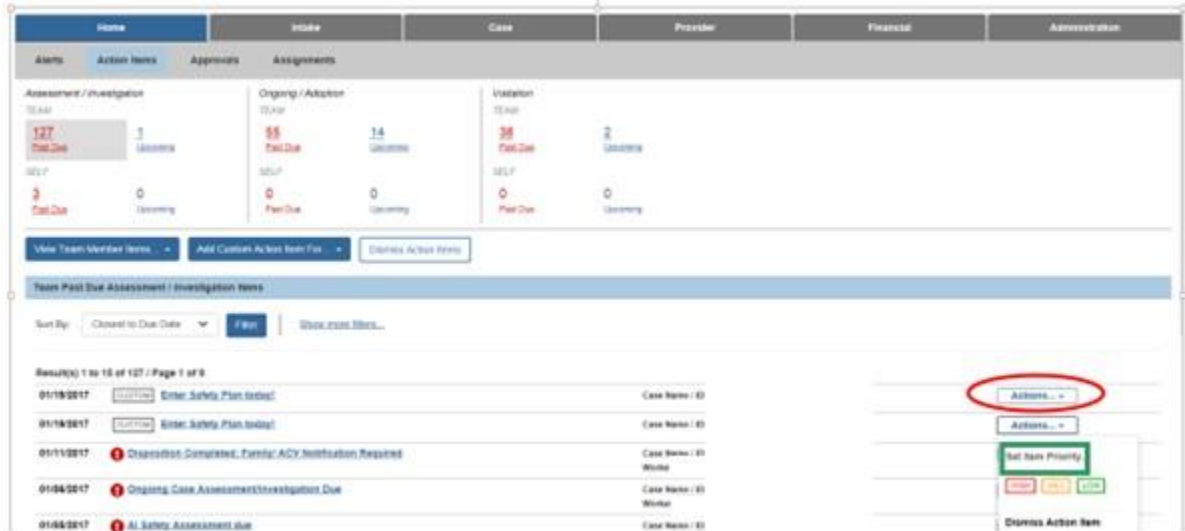


Navigating Action Items

Setting Priority Status for Action Items

A Supervisor has the ability to set the priority status of any **Action Item**.

1. Click the **Actions** button next to an Action Item or Custom Action Item. **Set Item Priority** will display.



2. Select the desired **Priority Status** by clicking one of the following options:



The selected **Priority** status displays next to the **Action Item**.



Navigating Action Items

Note: When a Priority status has been added to an Action Item, it will display wherever the Action Item is displayed, including the Home Alerts page, as well as on the Case or Provider Overview, as applicable.

Removing Priority Status from Action Items

The Supervisor can remove the Priority status from an **Action Item**.

1. Click **Remove Priority** on the **Actions** drop-down menu.



The **Priority** label will no longer appear beside the **Action Item**.

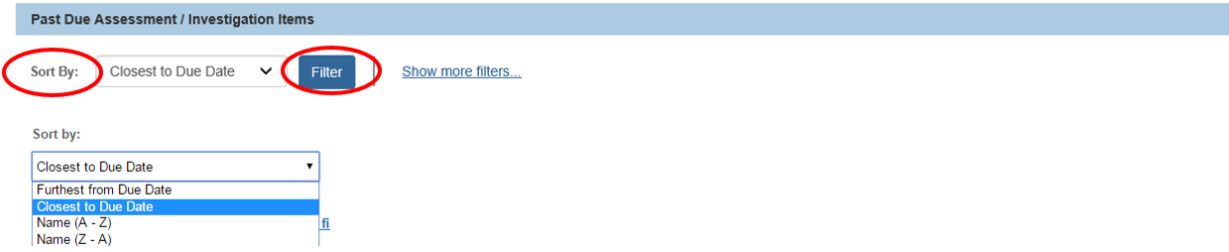


Using Action Item Filters

A user can find specific Past Due or Upcoming Action Items by using the **Filter** options. Once a user clicks Action Items, a list of Action Items will appear in the default view, *Closest to Due Date*.

1. Click the **Sort By** drop-down menu to select a sort option different than the default value. There are three additional sorting options that display for selection:
 - Furthest From Due Date
 - Name (A-Z)
 - Name (Z-A)
2. Click the Filter button (only if you have selected a Sort By option other than the default value (Closest to Due Date)).

Navigating Action Items

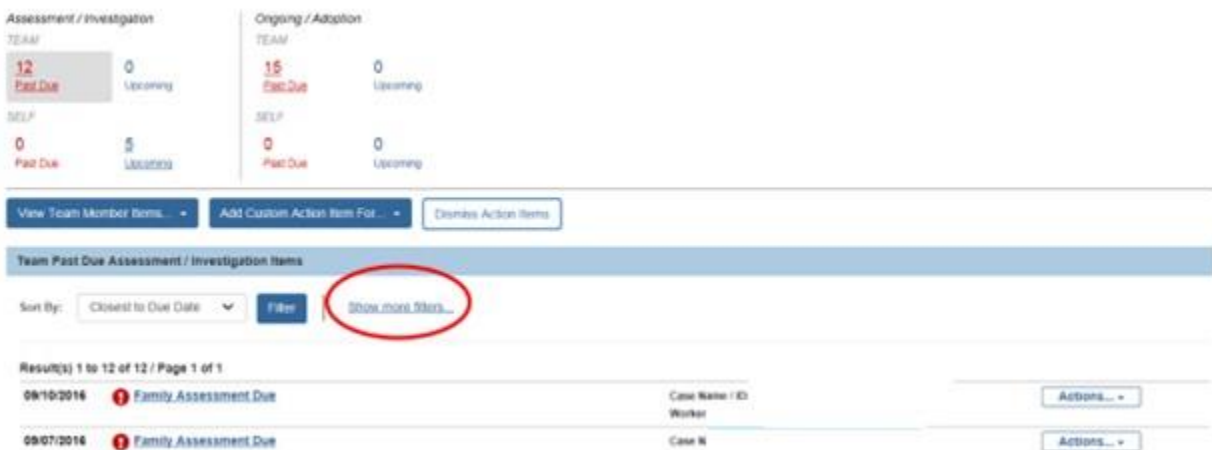


Results display based on the selected sort criterion. In this example, the default view is shown.



Filters can be used to find **Action Items** related to specific case work items.

1. Click **Show More Filters**.



Note: In addition to the **Sort By** Filter, the User can filter by using drop-down menus under **Name** or **Task Type**. The user may use one or more Filters, depending on the information being sought.

Navigating Action Items

The **Name** drop-down includes a list of Assignments, such as Cases or Providers, found in the list.

When a **Case Name** is selected, a Person field displays, allowing the user to further refine the results by selecting a specific Case Member.

The **Task Type** drop-down includes a list of work items, such as, Case Plan or Safety Plan, to which the results can be limited. For example, select Case Review to view all the Action Items for Case Review Due.

2. After selecting the desired filters, click **Filter**.

Name:

Task Type:

Sort By:

| [Show fewer filters](#)

Any **Action Items** meeting the specific criteria will display.

1. Click **Reset** to return to the default settings.
2. Click **Show Fewer** filters to minimize the filter display.

Note: When filters are collapsed, one or more gray boxes may appear under the Sort By drop-down menu. This indicates what, if any, Filters are being used.

1. Click the **gray box** (in this example, **Name** and **Task Type**) to clear the Filter.

Past Due Assessment / Investigation Items

Sort By: [Show fewer filters...](#)

Results: 1 to 2 of 2 / Page 1 of 1

01/18/2017	<input type="text" value="Enter Safety Plan today!"/>	Case Name (1)	<input type="button" value="Actions..."/>
11/28/2016	<input type="text" value="Family Assessment Due"/>	Case Name (1)	

Navigating Action Items

Navigating the Case Overview Page

Action Items also display on the **Case Overview** and **Provider Overview** pages. To view **Action Items** from the **Case Overview** page:

1. Click **Case** on the **Home** page.
2. Click **Workload**.
3. Click on a specific case from the **Workload** list.

The user is directed to the **Case Overview** page.

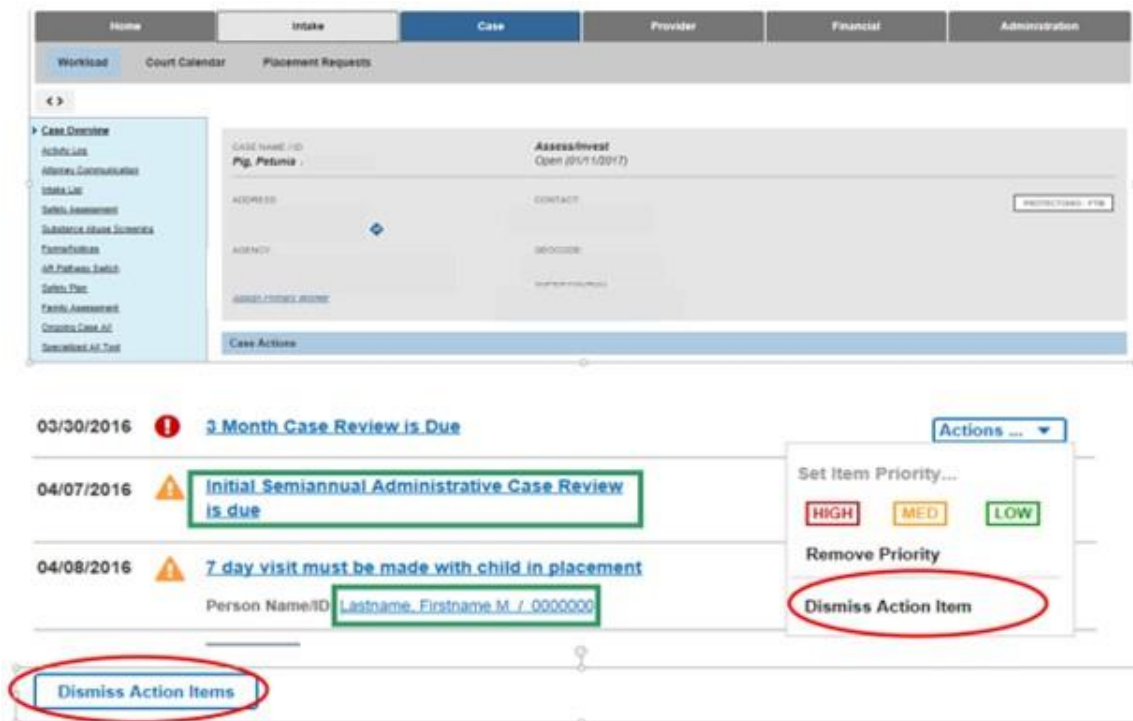
The **Action Items** appear on the second half of the **Case Overview** page. **All Past Due** and **Upcoming Action Items** for the **Case** display in a list.

The display and function of **Action Items** already described for the **Home Alerts** page also apply from the **Case Overview**. These functions are:

- Hyperlinks to Work Items or Person. (Case hyperlink is not applicable when viewing within the Case.)
- Supervisor has the ability to Set Item Priority or Dismiss Priority
- Caseworker and Supervisor can Dismiss Custom Action Items
- Supervisor or other individual(s) with the appropriate security profile can Dismiss system generated Action Items
-

For users with the appropriate security profile:

1. Click **Dismiss Action Items** at the bottom of the page, or from the **Actions** drop-down menu, to navigate to the Action Items Dismissal page in Administration> Maintenance.



Navigating Action Items

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