

Recording an Assessment/ Investigation Initiated Activity Log



Knowledge Base Article

Recording an Assessment/ Investigation Initiated Activity Log

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Recording an Assessment/ Investigation Initiated Activity Log

Overview

This Knowledge Base Article discusses how to record an Assessment/Investigation Initiated activity log in Ohio SACWIS. The resulting data is used for NCANDS and other reporting purposes. The data may also be used to support Quality Assurance (QA) processes at your agency.

Assessment/Investigation initiation data is required for the following screened in intake types, whether emergency or non-emergency:

- CA/N (Traditional or Alternative Response)
- Dependency
- FINS Stranger Danger
- FINS Safe Haven/Deserted Child

Initiation must be documented in an Activity Log in Ohio SACWIS, and the Activity Log must have a status of Completed for the data to be mapped for reporting purposes.

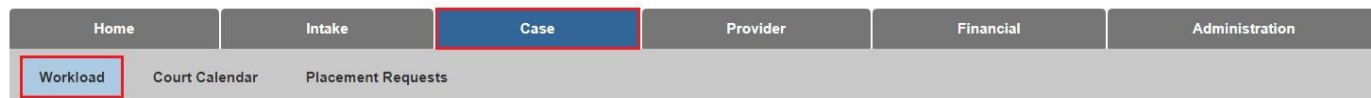
The initiation Activity Log must be Completed to before the Disposition can be marked Completed, and before the associated CAPMIS tools can be routed for approval.

The required details of the Activity Log and related validations are discussed in more detail in this article.

Creating an Assessment / Investigation Initiated Activity Log

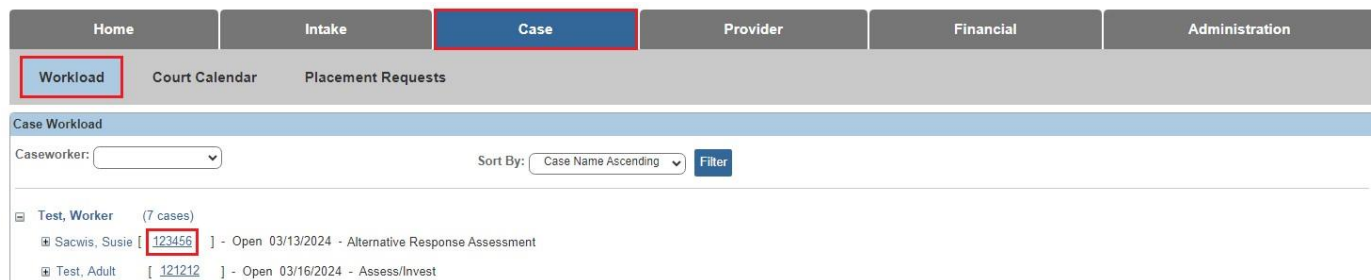
From the Ohio SACWIS Home screen

1. Click the **Case** tab.
2. Click the **Workload** tab.



The **Case Workload** screen appears.

3. On the Case Workload screen, click the appropriate Case Number ID link.



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The **Case Overview** screen appears.

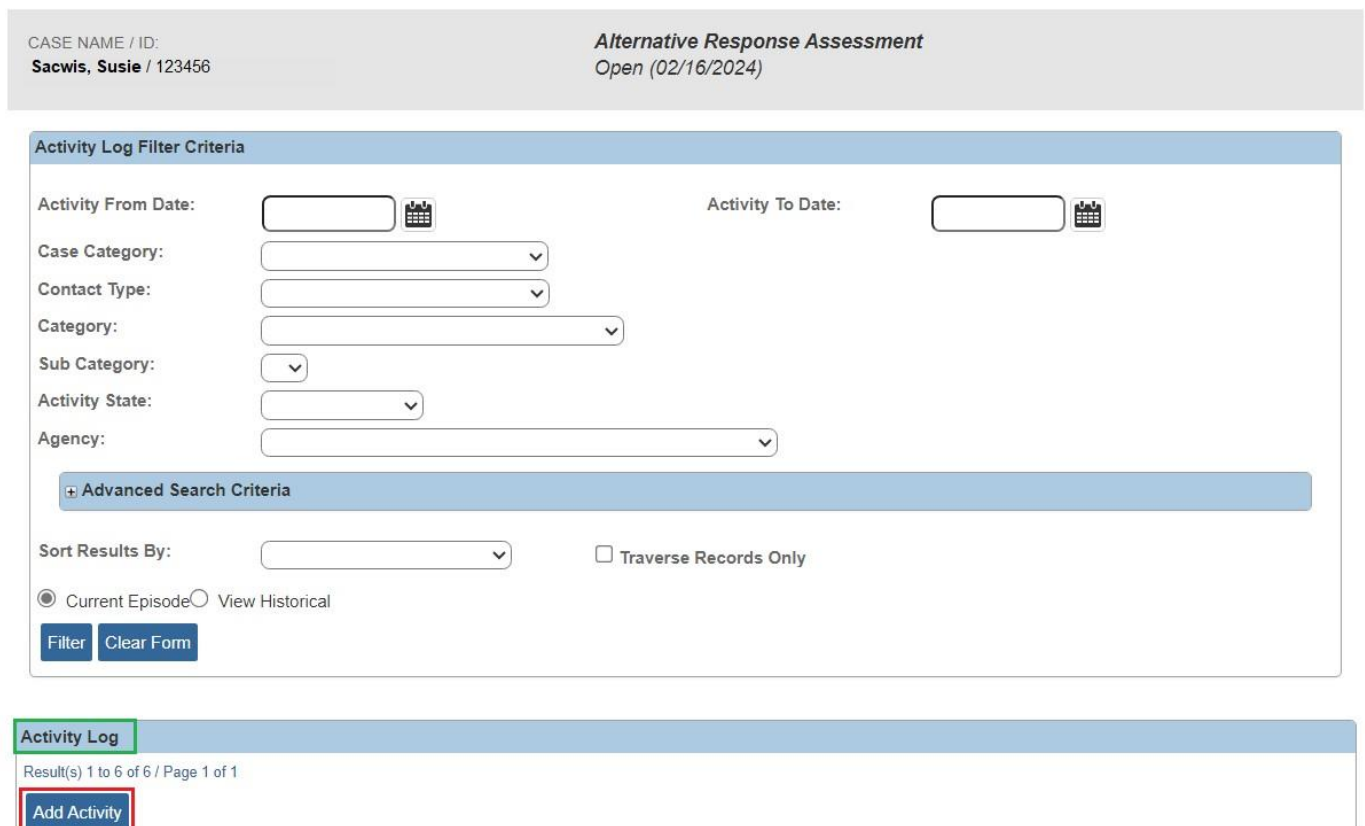
Completing the Activity Log

1. On the Case Overview screen, click the **Activity Log** link in the Navigation pane on the left.



The **Activity Log** screen appears.

2. Click, **Add Activity** in the **Activity Log** grid.



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The **Activity Details** screen appears with the **Start Activity Date** and **Responsible Worker** automatically populated to match the current date and the logged-in worker.

Important:

The information that appears in the default fields can be changed, as needed.

Completing the Required Fields to Document Initiation

1. In the **Activity Details** grid, verify the **Start Activity Date** is correct, or enter another date.
2. Enter the **Start Time**.
3. Enter the appropriate **End Activity Date**.
4. Enter the **End Time**.
5. Verify the **Responsible Worker** is correct. Otherwise, select the appropriate worker from the drop-down list.

Activity Details	Intake Info	Participants	Visitation Plans	Narrative	
CASE NAME / ID: Sacwis, Susie / 123456		Alternative Response Assessment / Open (02/16/2024)			
Activity Log ID: 0		Activity Start Date: 05/14/2024			
Activity Details					
Create Date:	May 14, 2024 11:16:56 AM	Created By:	Sacwis, Susie	Agency:	Test County Children Services
Start Activity Date: *	05/14/2024	Time:		AM	
End Activity Date:		Time:		AM	
Responsible Worker: *		Originator Of Information:			
Contact Duration:		<input type="checkbox"/> High Priority			

Important:

It is imperative the dates entered correctly reflect the initiation of the Assessment/Investigation. For initiation requirements, see rules 5101:2-36-03 through 5101:2-36-07 and 5101:2-36-20 at <http://emanuals.jfs.ohio.gov/FamChild/FCASM/SocialServices/>.

The Start Activity Date must not be earlier than the Screening Decision Date/Time of the Intake.

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Selecting Contact Types

1. In the **Contact Types** grid, select the appropriate contact type(s) from the list of **Available Contact Types**. More than one type can be selected, however, at least one of the following types must be selected to meet the requirements for initiation:
 - Announced Home Visit
 - Unannounced Home Visit
 - Face-to-Face
 - Interviews
 - Office Visit
 - Letter To (Alternative Response Only)
2. Click **Add** (activated when you select a Contact Type) to move the selection(s) to the **Select Contact Types** field.

The screenshot shows a web interface for selecting contact types. It features two main panels: 'Available Contact Types' on the left and 'Select Contact Types: *' on the right. The 'Available Contact Types' panel includes a search bar, an 'Add All' link, and an 'Add' button. A list of contact types is displayed, with 'Face-to-Face' selected and highlighted in blue. The 'Select Contact Types' panel includes 'Remove' and 'Remove All' buttons and a search bar, but it is currently empty.

Selecting Categories

1. In the **Category Information** grid, select one of the following from the **Case Category** drop-down menu:
 - Assessment/Investigation
 - Alternative Response Assessment
 - Ongoing
 - Alternative Response Ongoing
 - Adoption

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Important:

The system defaults to the current case category, but it can be changed.

To ensure all Intake Participants will be available for selection on the participants tab, select Assessment/Investigation or Alternative Response Assessment.

If you select Ongoing, AR Ongoing, or Adoption, the Participants tab will display Case Participants, Associated Persons, and Placement Providers for selection.

2. From the **Category** drop-down menu, select, **Assessment/Investigation Mandate**.
3. In the **Available Sub Category** field, select **Assessment/Investigation Initiated**, as well as any other applicable Sub Categories.
4. Click **Add** to move the selection(s) to the **Select Sub Categories** field.

The screenshot displays the 'Category Information' form. At the top, there is a 'Case Category:' dropdown menu currently set to 'Alternative Response Assessment'. Below it is a 'Category:' dropdown menu. The main section is divided into two panes. The left pane, titled 'Available Sub Categories:', contains a list of sub-categories: Case Closure Summary, ICPC Adoption, Client Services, Adoption Assistance Connections, Case Closure Summary, Client Services, BCII, and A/I Dispo Notification ACV/CSR. There is a search bar and an 'Add All' button at the top of this list. The right pane, titled 'Select Sub Categories: *', is currently empty and has a search bar at the top. A red box highlights the 'Add' button in the left pane and the 'Select Sub Categories' pane. Below these panes is an 'Other Sub Category:' text input field.

Important: If initiation was made by an attempted or successful face-to-face contact, add all relevant sub-categories to ensure all efforts are counted for data reporting and case management purposes. This data drives certain Assessment/Investigation Action Items, and populates reports such as the Intake Assessment/Investigation Face-to-Face Contact report and the A/I Checklist.

Additionally, you will only be able to associate Participants to the Activity Log if there is at least one Sub-Category selected in addition to Assessment/Investigation Initiated. If no additional Sub-Category is selected, you will not be able to associate any participant, nor will participants be required.

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Completing the Location Information Grid

1. In the Location Information grid (optional), select the applicable location from the Location Type drop-down menu.
2. Complete Other Location and Location Details (optional) if you wish to provide more specific information about the location of the contact.
3. Click the **Intake Info** tab.

Activity Details	Intake Info	Participants	Visitation Plans	Narrative
Location Information				
Location Type: <input type="text"/>				
Other Location: <input type="text"/>				
Location Details: <input type="text" value="Test Narrative"/>				
<input type="button" value="Spell Check"/> <input type="button" value="Clear"/> 250				

Completing the Intake Information Tab

The **Intake Information** tab page appears, displaying a list of Intakes linked to the Case for the Current Case Episode and Historical Case Episode(s).

1. Click the **Participants** tab.

Activity Details	Intake Info	Participants	Visitation Plans	Narrative		
CASE NAME / ID: Sacwis, Susie / 123456 <i>Alternative Response Assessment / Open (02/16/2024)</i>						
Activity Log ID: 10 Activity Start Date: 05/14/2024						
Intake Information						
Current Case Episode						
<input type="checkbox"/>	Intake ID	Screening Decision	Date	Category	Type(s)	Agency
<input type="checkbox"/>		Screened In AR	02/16/2024	CA/N Report	Neglect	County Children Services
Historical Case Episode(s)						
<input type="checkbox"/>	Intake ID	Screening Decision	Date	Category	Type(s)	Agency

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Completing the Participants Tab

Activity Details	Intake Info	Participants	Visitation Plans	Narrative
CASE NAME / ID: Sacwis, Susie / 123456		Alternative Response Assessment / Open (02/16/2024)		
Activity Log ID: 10		Activity Start Date: 05/14/2024		

The **Participants** tab page appears, displaying the **Associate Participants** grid.

Important: Depending on the Case Category selected on the Activity Details tab, the page will show either a list of **Intake Participants** (displayed in the graphic below),

Activity Details	Intake Info	Participants	Visitation Plans	Narrative
CASE NAME / ID: Sacwis, Susie / 123456		Alternative Response Assessment / Open (02/16/2024)		
Activity Log ID: 10		Activity Start Date: 03/17/2024		
Choose Participants				
Intake Participants				
Contact Status				
Test, Adult - 05/03/1993		<input checked="" type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed <input type="radio"/> In Regards To		
Test, Adult - 11/08/1990		<input type="radio"/> None <input type="radio"/> Attempted <input checked="" type="radio"/> Completed <input type="radio"/> In Regards To		

OR,

a list of **Case Participants**, **Case Associated Persons**, and **Placement Providers**, as applicable (displayed by the graphic below).

1. Select the relevant **Contact Status** for each Participant by clicking the appropriate radio button.
2. Click the **Narrative** tab.

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Activity Details	State Info	Participants	Violation Phase	Narrative
Associate Participants				
Case Participants				
		Contact Status		
Potter, Harry - 07/31/2019		<input type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed <input type="radio"/> In Regards To		
Potter, James - 04/01/1990		<input type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed <input type="radio"/> In Regards To		
Potter, Lily - 08/08/1990		<input type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed <input type="radio"/> In Regards To		
Case Associated Persons				
		Contact Status		
Dumbledore, Albus - 02/02/1943		<input type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed		
McGonagall, Minerva - 09/09/1955		<input type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed		
Weasley, Molly		<input type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed		
Placement Providers				
		Contact Status		
		<input type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed		

Completing the Narrative Tab

The **Narrative** screen displays.

1. Record the **Narrative Details** of the initiation contact.
2. In the **Activity State** field, select **Completed** from the drop-down list.

Important: If you do not choose Completed, the activity log remains in Draft status and none of the information will be counted in reports. The Activity State field must have a Completed status to map the data.

3. Click **Save**.

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Activity Details	Intake Info	Participants	Visitation Plans	Narrative
CASE NAME / ID: Sacwis, Susie / 123456		Alternative Response Assessment / Open (02/16/2024)		
Activity Log ID: 10		Activity Start Date: 05/14/2024		

Associated Participants : No Selected Associate participants for this activity log

Narrative Information

To document quality face to face visits, please consider the following:

- Describe each child's current safety, risk, vulnerability, progress toward permanency goals, achievement of case plan goals and overall well-being.
- Describe each parent/caregiver/other adult's protective capacities, ability to meet the needs of the child(ren), progress toward permanency goals, achievement of case plan goals and overall well-being.
- Describe the household composition, observations of the home environment (including basic needs) and the current level of involvement of the non-custodial parent.

Narrative Details

Narrative: *

(expand full screen)

Spell Check

10000

Narrative History

Type	Date/Time Created	Created By	Agency
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Insert Correction

View Narrative

Activity State: * Completed ▾

Apply Save Cancel Delete

The **Activity Log** list screen appears, displaying the new record. The Activity State column displays as **Completed**.

Activity Log

Result(s) 1 to 7 of 7 / Page 1 of 1

Add Activity

	Activity Date	Contact Type	Category	Sub Category	Created By	Activity State	Narrative
edit	05/14/2024	Face-to-Face	General	Case Review		Completed	
copy							
report	Associated Participants:						

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Note: If you return to the Intake List from the left navigation, you will see the initiation in the grid. The initiation date/time is also a hyperlink to view the initiation activity log just completed.

[Case Overview](#)
[Activity Log](#)
[Attorney Communication](#)
[Intake List](#)
[Safety Assessment](#)
[Substance Abuse Screening](#)
[Forms/Notices](#)
[Category/Pathway Switch](#)
[Safety Plan](#)
[Actuarial Risk Assessment](#)
[Family Assessment](#)
[Ongoing Case A/I](#)
[Specialized A/I Tool](#)
[Law Enforcement](#)
[Justification/Waiver](#)
[Case Services](#)
[Legal Actions](#)
[Legal Custody/Status](#)
[Living Arrangement / Guardianship](#)

CASE NAME / ID:
Sacwis, Susie / 123456

Alternative Response Assessment
Open (02/16/2024)

Current Case Episode Intake List

Intake ID	Status	Decision Date - Time	Category	Type	Initiation Date/Time	Case Disposition Disposition Date	Investigation/ Assessment Completion Date	Agency Name	
131313 reports	Screened In AR	02/16/2024 11:11 AM County Priority 3	CA/N Report	Neglect	02/16/2024 11:40 AM			Test County Children Services	unlink

[Record Disposition\(s\)](#) [Update Disposition\(s\)](#)

Historical Case Episode(s) Intake List

Intake ID	Status	Decision Date - Time	Category	Type	Initiation Date/Time	Case Disposition Disposition Date	Investigation/ Assessment Completion Date	Agency Name	
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Note: If you return to the Intake List from the navigation pane, you can now see the initiation in the grid. The initiation date/time is also a hyperlink to view the initiation activity log they just completed.

Note: The system will check to make sure an Initiation Activity Log has been completed for the Intake(s) to complete the Safety Assessment, Family Assessment, Ongoing Case A/I, Specialized A/I, or a waiver of any of these tools for the specified Intake. The system will also require the completed Initiation Activity Log to complete the Disposition for the Intake.

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