

Recording an Activity Log on a Provider Record

Complete the following steps to record an activity log on a provider record:

Navigating to the Activity Details Screen

1. From the SACWIS **Home** screen, click the **Provider Tab**.
2. Click the **Directory** tab.
3. Enter the appropriate filter criteria.
4. Click the **Search** button. The results appear in the **Provider Profile Search Results** section of the screen.
5. Click the **Edit** link next to the appropriate provider record.

Retrieved more than 500 records. Only first 500 have been returned.

Provider Search Provider Match

Provider Profile Search Criteria

Provider Name: AKA Provider Category:

Provider Type:

Agency Type: Agency: of Job and Family Services

Member First Name: Member Last Name: Sounds Like

Provider Reference Type: Provider Reference Number: Provider Status:

OR

Provider ID:

Advanced Search Criteria

Provider Profile Search Results

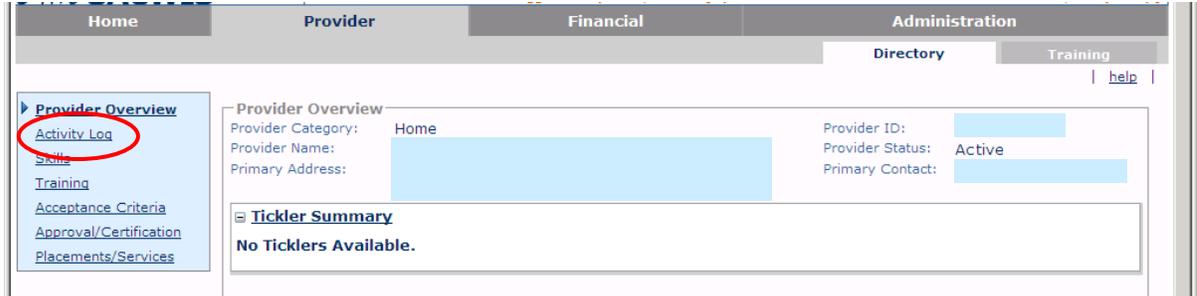
Result(s) 1 - 15 of 500

	Provider Name/ ID	Provider Status	Provider Category	Address	Page
view edit		ACTIVE	NONODJFS		
view edit		ACTIVE	NONODJFS		

The **Provider Overview** screen appears.

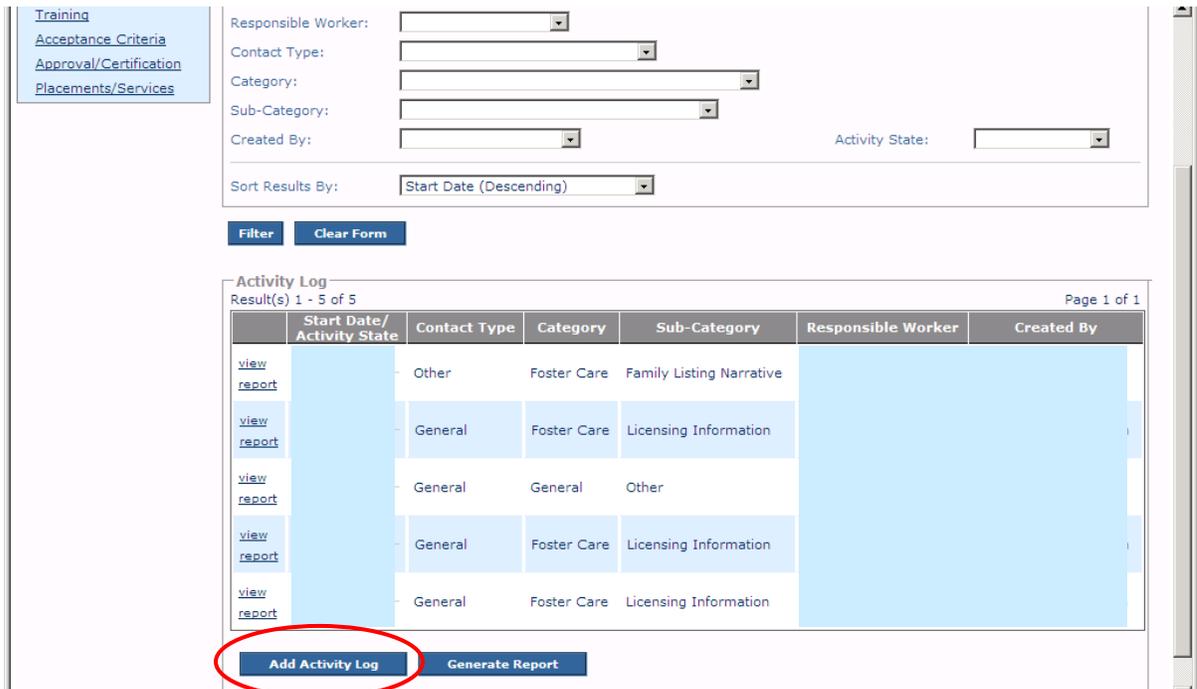
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6. Click the **Activity Log** link in the **Navigation** menu on the left.



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

7. Click the **Add Activity Log** button at the bottom of the screen.



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

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Completing the Activity Log Details Screen

1. In the **Start Activity Date** field, verify that the date is correct. SACWIS auto-populates this field with the current date, but it can be changed.
2. If needed, enter the appropriate time in the **Start Time** field.
 - The **Start Time** field is not required, but 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.
3. In the **Contact Types** field, select the most appropriate value.

Example: If you are documenting a meeting with the foster / adoptive parents, select **Face-to-Face Visit with Provider(s)**.

4. 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.

Example: Continuing with the scenario above, choose **Foster / Adoptive Home Applicant**.

5. 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.

Example: Continuing with the scenario, select **Assessment Visit**.

The screenshot shows the 'Activity Log Details' form. At the top, it displays 'Created By:' and 'Date & Time Entered: Nov 14, 2011 08:47:54 AM'. The form is divided into several sections. A red rectangular box highlights the following fields: 'Responsible Worker:' (a dropdown menu), 'Activity Start Date: *' (a date field with a calendar icon, showing '11/14/2011'), 'Originator of Information:' (a dropdown menu), 'Start Time:' (a time field with a dropdown), 'End Time:' (a time field with a dropdown), 'Contact Type: *' (a dropdown menu showing 'Face-to-Face Visit with Provider(s)'), 'Category: *' (a dropdown menu showing 'Foster/Adoptive Home Applicant'), 'Sub-Category: *' (a dropdown menu showing 'Assessment Visit'), and 'Other Sub-Category:' (a text input field). To the right of the 'Contact Type' field is a 'Contact Duration:' dropdown menu. At the bottom right of the highlighted area are two checkboxes: 'High Priority' and 'Restricted'.

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6. In the **Location Type** field (**Activity Details** screen), select the location where the activity took place. This is an optional field, but entering a value assists with compliance monitoring.
7. In the **Activity Association** section, click the **Associate Members** link.

The screenshot shows the 'Activity Details' screen. The 'Location Information' section is highlighted with a red box. It contains a 'Location Type' dropdown menu with 'Parent/Caregiver Home' selected. Below it is a 'Location Details' section with a list of options: 'Agency Setting', 'Placement Setting', 'Parent/Caregiver Home', 'Neutral Off-Site', and 'Other'. The 'Parent/Caregiver Home' option is highlighted. To the right is an 'Other Location' text field. Below the 'Location Information' section is the 'Activity Association' section, which includes a link labeled 'Associate Members' circled in red. Below that is a 'Provider Household' section.

The **Associate Members** screen appears.

Completing the Associate Members Screen

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

The screenshot shows the 'Associate Members' screen. It has a title bar 'Associate Members' and a section 'Members:'. Below this is a list of members with checkboxes. The first member is 'Sacwis. Sam - 04/06/2002' with an unchecked checkbox. The second member is 'Sacwis. Susie - 03/26/1984' with a checked checkbox. At the bottom left, there are two buttons: 'OK' and 'Cancel', both circled in red.

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

The screenshot shows the 'Activity Details' screen, specifically the 'Activity Association' section. It has a title bar 'Activity Association' and a section 'Activity Applicable to Following Members [Associate Members]'. Below this is a list of members with checkboxes. The first member is 'Sacwis. Susie - 03/26/1984' with a checked checkbox, and this entire row is highlighted with a red box. Below that is a section 'Activity Applicable to Following Children Placed [Associate Children]' and a checkbox labeled 'Save Note to Child(ren) Record'.

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3. If any children placed in the home were involved in the activity, click the **Associate Children** link.



Activity Applicable to Following Children Placed [[Associate Children](#)] Save Note to Child(ren) Record

The **Associated Placed Children** screen appears.

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



Associate Placed Children

Placed Children:

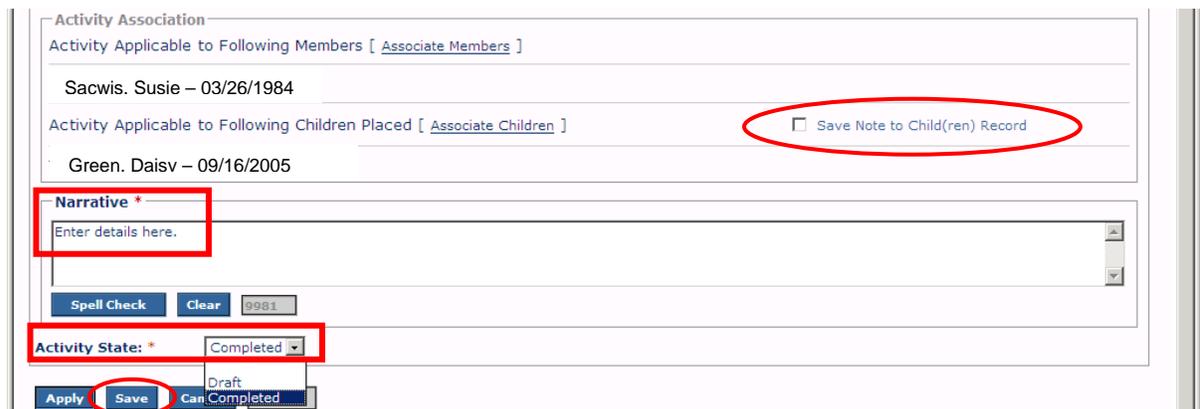
Green. Daisv – 09/16/2005

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

6. 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.
7. In the **Narrative** field, enter details from the activity being recorded.
8. If you are satisfied that all of the fields on the activity log have been fully completed and are accurate, in the **Activity State** field, change the status to **Completed**.

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

9. When complete, click the **Save** button at the bottom of the screen.



Activity Association

Activity Applicable to Following Members [[Associate Members](#)]

Sacwis. Susie – 03/26/1984

Activity Applicable to Following Children Placed [[Associate Children](#)] Save Note to Child(ren) Record

Green. Daisv – 09/16/2005

Narrative *

Enter details here.

Spell Check Clear 9981

Activity State: * Completed

Apply

Recording an Activity Log on a Provider Record

The **Activity Log Filter Criteria** screen appears displaying a message that your data has been saved.

The screenshot displays a web application interface with a navigation menu at the top (Home, Provider, Financial, Administration) and a sub-menu (Directory, Training). A left sidebar contains links for Provider Overview, Activity Log, Skills, Training, Acceptance Criteria, Approval/Certification, and Placements/Services. The main content area features a confirmation message: "Your data has been saved." with a "close confirmation" button. Below this is the "Activity Log Filter Criteria" form, which includes fields for Provider Category (Home), Provider ID, and Provider Name. The filter criteria section contains: Activity From Date and Activity To Date (date pickers); Responsible Worker (text input); Contact Type (dropdown); Category (dropdown); Sub-Category (dropdown); Created By (dropdown); and Activity State (dropdown). A "Sort Results By" dropdown is set to "Start Date (Descending)". "Filter" and "Clear Form" buttons are located below the filter criteria. At the bottom, an "Activity Log" table header is visible, showing "Result(s) 1 - 6 of 6" and "Page 1 of 1". The table columns are: Start Date/Activity State, Contact Type, Category, Sub-Category, Responsible Worker, and Created By.