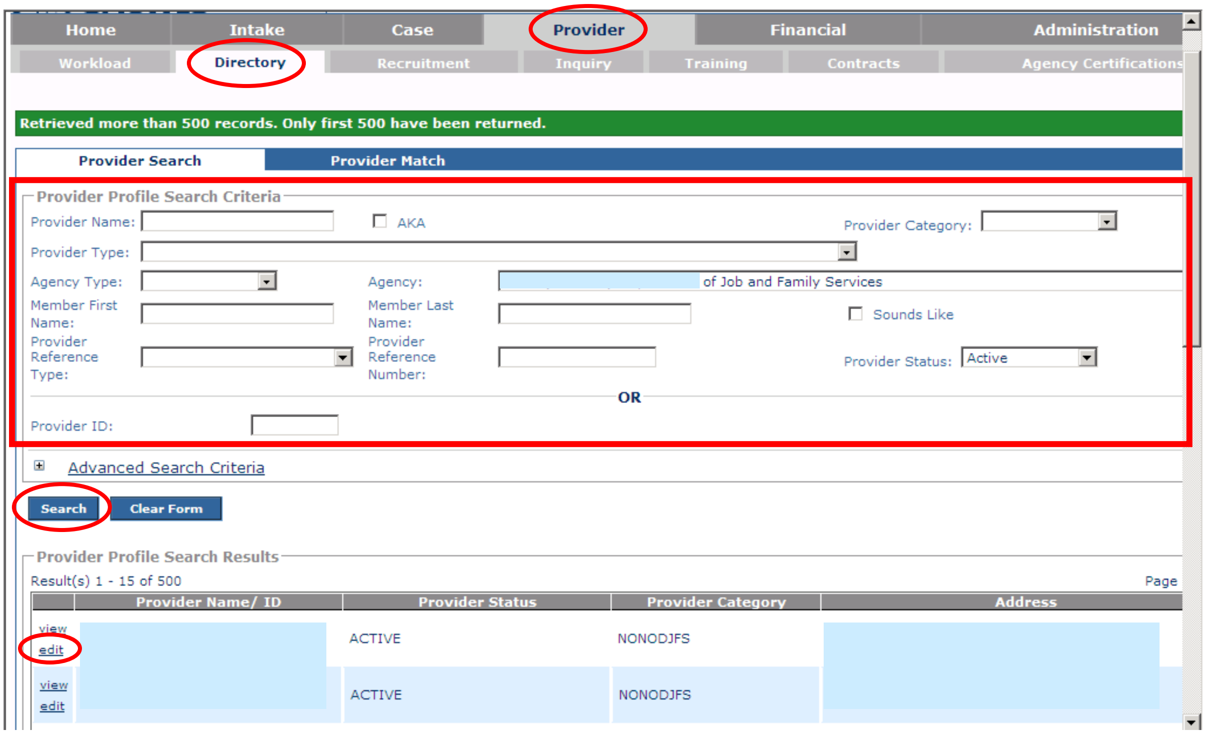
Recording an Activity Log on a Provider Record

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.



The **Provider Overview** screen appears.

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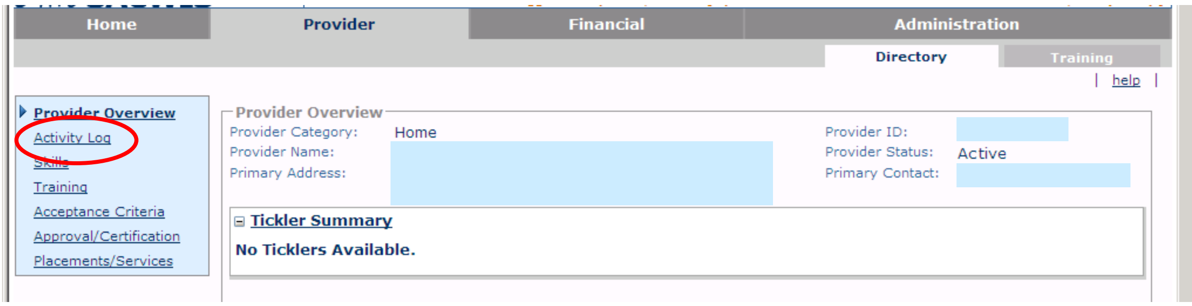
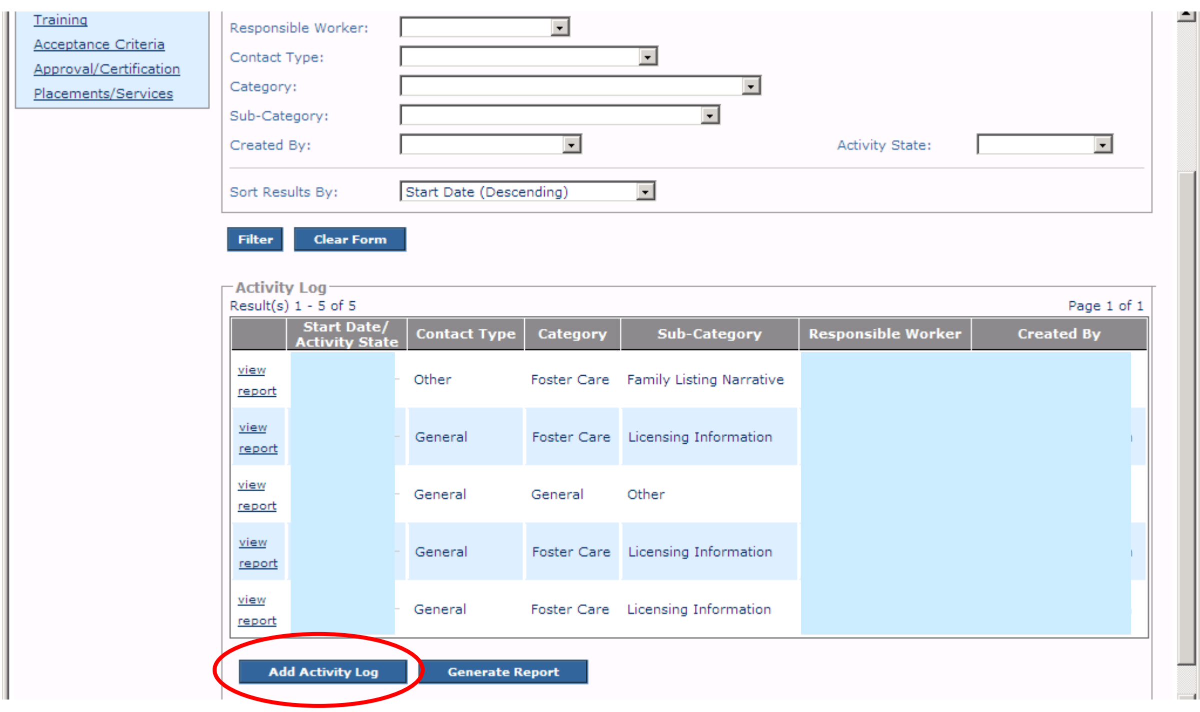
6. Click the **Activity Log** link in the **Navigation** menu on the left.



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.

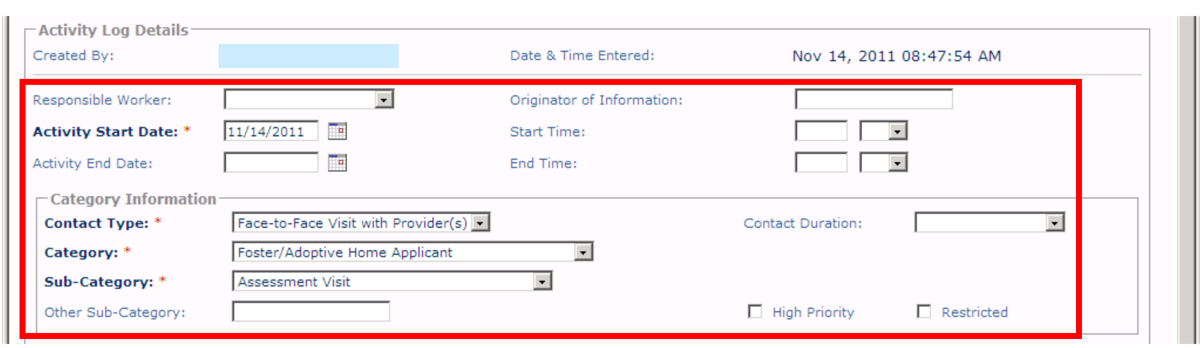
Example: If you are documenting a meeting with the foster / adoptive parents, select **Face-to-Face Visit with Provider(s)**.

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**.



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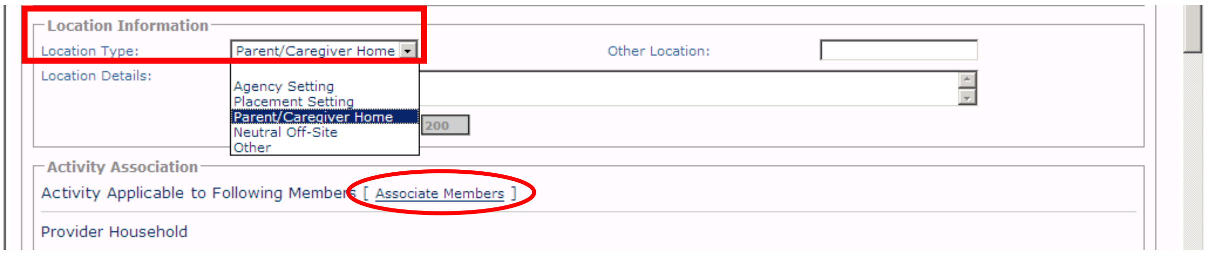
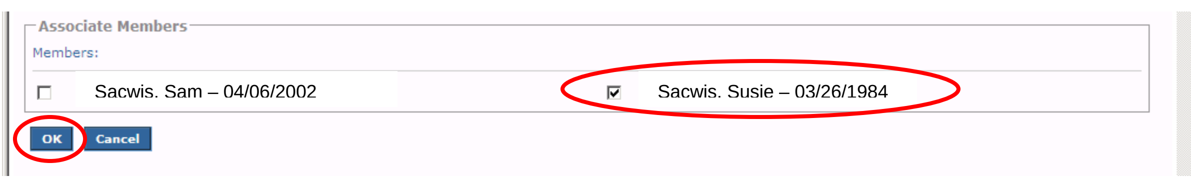
6. In the **Location Type** field (**Activity Details** screen), select the location where the activity took place. This is an optional field, but entering a value assists with compliance monitoring.
7. In the **Activity Association** section, click the **Associate Members** link.



The **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.



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

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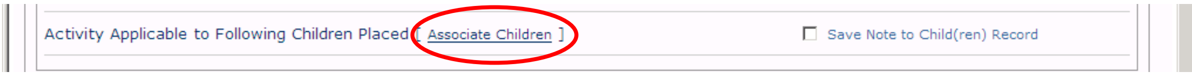
3. If any children placed in the home were involved in the activity, click the **Associate Children** link.



The **Associated Placed Children** screen appears.

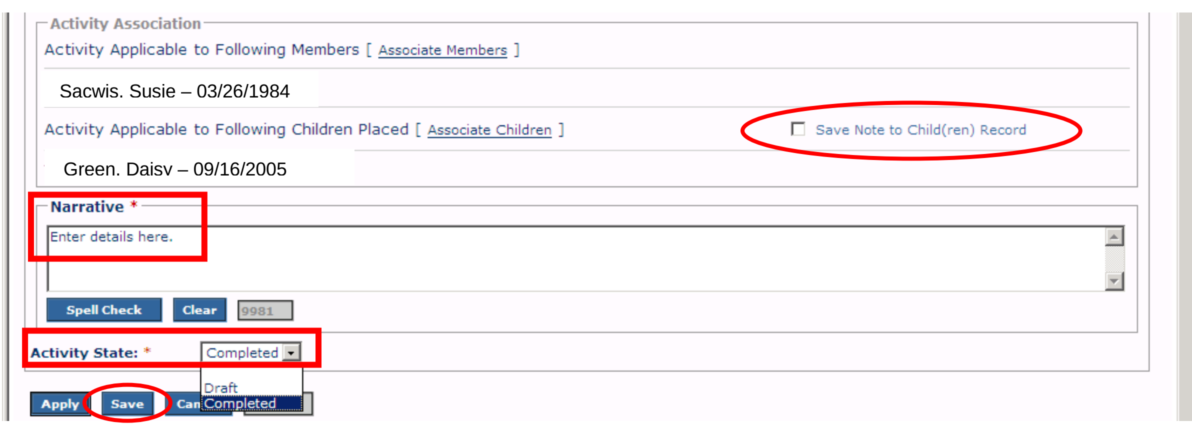
4. Select the box next to any child involved in the activity being recorded.
5. When complete, click the **OK** button.

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.



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