California Automated Response and Engagement System (CWS-CARES)
Resource Family Application (RFA) Project

CARES
Child Welfare Services

Logging Activities

To be used with **Module 4: Scheduling Meetings, Logging Activities, Creating Tasks, & Searching/Printing Records** Participant Guide

May 2022
Quick Guide 4b
Version 6.0

Revision History

Revision / Version #	Date of Release	Author	Summary of Changes
1.0		Melissa Smith	Initial draft
2.0		Melissa Smith	Updated Draft
3.0	01/21/2022	Lori Savageau	ADA Compliance Check
4.0	02/17/2022	Melissa Smith	Revised ADA Compliance Check
5.0	03/01/2022	Lori Savageau	Final ADA Review and Revision
6.0	05/23/2022	Melissa Smith	• Changed title from “Creating Activities” to “Logging Activities” • Changed from QG 4a to QG 4b • Ti.04 – Ti.06 enhancement updates

Logging Activities

From the Application Overview page:

1. Click the **Activity** tab. - The **Activity** tab displays.
2. On the **Activity** tab, you will see 3 sub-tabs – **Log an Activity**, **Schedule Meeting**, and **Create a Task**. You are defaulted to the **Log an Activity** sub-tab.
3. On the right-hand side of the page, click the **Add** button. - The **Log an Activity** page expands.
4. Click in the **Subject** field and from the dropdown list, select one of the following types of activity:
    a. **None**
    b. **Application Information**
    c. **Background checks**
    d. **Exemptions**
    e. **Family Evaluation**
    f. **Home Assessment**
    g. **Orientation**
    h. **Other**
5. In the **Status** field, enter the status of **Open** or **Completed**
6. In the **Type** field, and from the dropdown list, select one of the following types:
    a. **In Person**
    b. **Text Message**
    c. **Video Chat**
    d. **Fax**
    e. **Written Correspondence**
7. In the **Completed Date** field, enter the *date completed*.
8. In the **Comment** field, enter a narrative regarding the activity being logged**.**
9. In the **Name** section, click the **Search Contact** field, and from the dropdown list, select *the individual* the activity was related to, or search for an individual by typing in the name. – The individual's name will display in the **Name** section. Add additional names, if needed.
10. The **Related To** field defaults to the application you are currently working on.
11. On the bottom right hand-side of the page, click the **Save** button. – The **Log an Activity** sub-tab contracts.
12. In the top middle of the page, a green message box displays indicating the activity was created.
13. Under the **Upcoming & Overdue** section, the activity you just created displays.

NOTE: Clicking the event link under the **Upcoming & Overdue** section, opens the **Task** page, showing details of the task.