

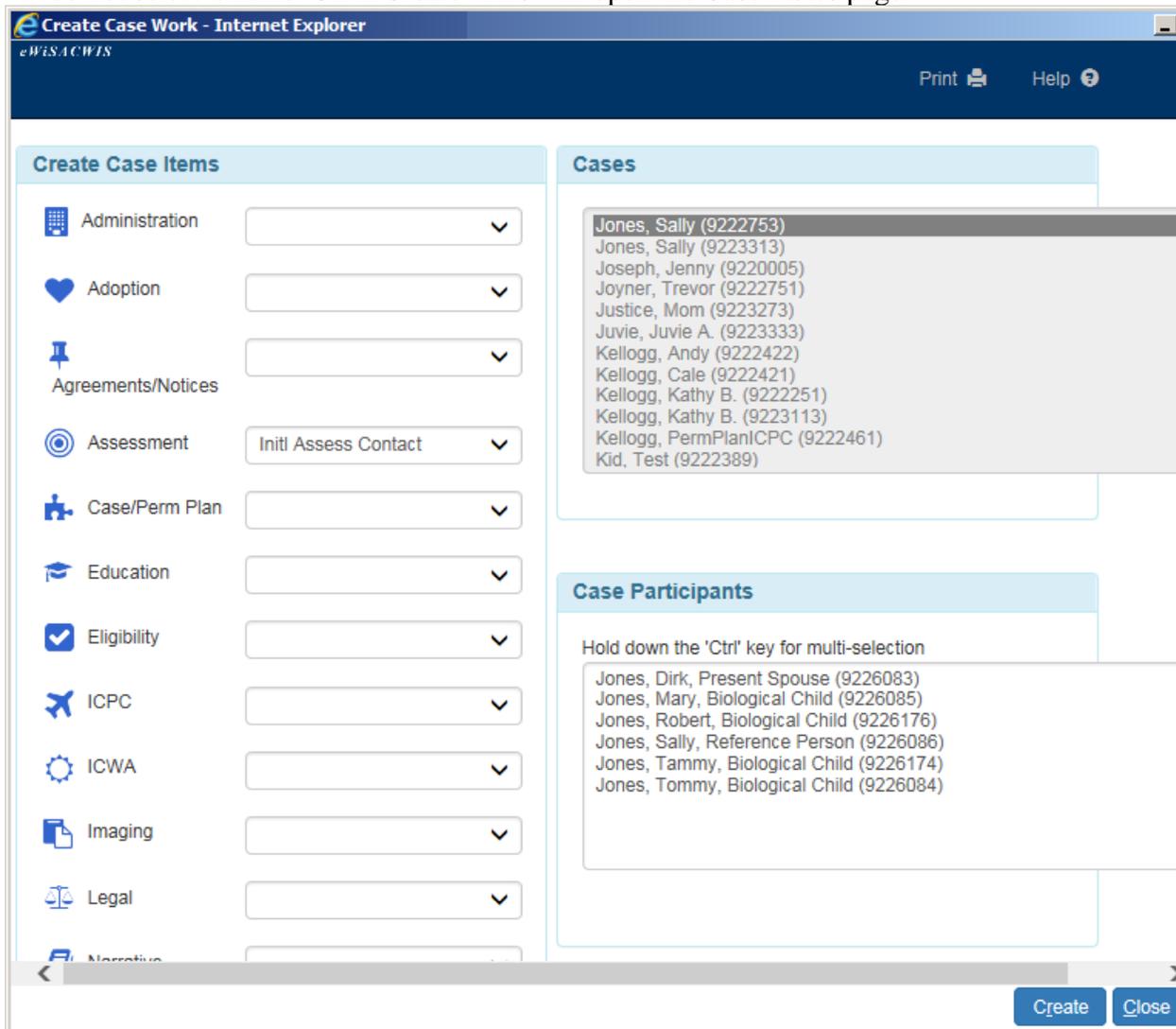
Initial Assessment Contacts

Note: In order to create a case note, an assignment to the case is not needed.

Creating Case Notes on Assigned Cases

1. Create an initial assessment contact case note using one of two methods:
 - a) From the desktop, go to the Cases tab and click the Case Work hyperlink [Create case work](#). This will open the Create Case Work page.

On the Create Case Work page, select the Inital Assess Contact from the Assessment drop-down and select the Case. The selection of case participants is optional; use the 'ctrl' key to select more than one participant. If the contact is with someone who is not a participant with the case, do not select a name. Click Create. This will open the Case Notes page.



- b) Or from your desktop, select Create Case Note from the Actions drop-down next to the specific case. This will open the Case Notes page.

| | | | | | | | | | |
|---|--|--|---|--|--|--|--|--|--|
| <p>Jones, Sally (9222753)</p> <p>Case details: CPS Family - Initial Assessment BMCW-Admin Intensive In-Home Open OHP exists for associated participant(s)</p> | | | <p>Case address: 123 Main Street Waldo, WI 53093 (262) 555-1212</p> | | | <p>Primary worker: Daisy, Dan (440) 943-7690 dan.daisy@wisconsin.gov</p> | | | <div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <ul style="list-style-type: none"> Case Note Criteria Search Create Assignment Create Case Note Create Case Work Create Meeting Print Case Record View Tasks <p style="text-align: center; margin-top: 5px;">Please select an action ▲</p> </div> |
|---|--|--|---|--|--|--|--|--|--|

2. On the Case Notes page, the top of the page pre-fills with the Case Name, Worker Creating Note, Worker Making Contact, and Date Entered. There is an option to Search out the Worker Making Contact if it is not the same as the person entering the case note. The note can be saved and updated for up to 30 days after it is created. When the Note Finalized checkbox is checked, 30 days have passed, or the Assessment is approved by a supervisor, the note will be frozen and not editable.
3. In the Note Information group box, the Date and Begin Time are required user entered fields. Case Notes created via Create Casework will automatically pre-fill the Category and Type with Initl Assess Contact and Face-to-Face, respectively. If creating the Case Note via Actions, select these values on the Category and Type drop-downs.
4. The Face-to-Face Location and Face-to-Face Result are drop-down value fields. Select a value that best describes the Assessment Contact Type.
5. The Participants in the case, which includes case participants and collaterals, display on the right side. You can use 'Ctrl' key to multi-select additional participants.
6. The Narrative group box is a user-entered field. Enter a narrative describing what happened during contact with the individual(s). For policy guidance, place your mouse over the 'Details.'
7. Notice the scroll bar to the right. The page is too big to display the entire contents. Use the scroll bar to view the bottom of the page.

Case Notes - Internet Explorer

eWISACHIS

Print Help

Case: Jones, Sally (9222753) Worker Creating Note: Cake, Caitlin M., III Worker Making Contact: Cake, Caitlin M., III [Search](#)

Case Note ID: Date Entered: 01/12/2018 11:39 AM Note Finalized Contact By Designee

Note Information

Date: 12/12/2017 Category: **Initl Assess Contact** View Inactive Participants

Begin Time: 11:41 AM AM PM Type: **Initial Face-to-Face**

End Time: 00:00 AM AM PM Type Detail:

Duration: 0000.0 Face-to-Face Location: **Home Visit** [Add Contacts](#)

Billable Face-to-Face Result: **Occurred**

Participants:
 Jones, Dirk (Present Spouse)
 Jones, Mary (Bio Child)
 Jones, Robert (Bio Child)
 Jones, Sally (Reference Person)
 Jones, Tammy (Bio Child)
 Jones, Tommy (Bio Child)

Hold down the 'Ctrl' key for multi-selection

Narrative

Case Note 1/1 [Details](#) [Create Structured Case Note](#)

Enter Narrative text here...

[Insert Correction Note](#) [Clear Fields](#) [Create](#) [Save](#) [Close](#)

100%

8. Below the Narrative group box is an expando with Assessment Contact Information.

The Begin Date field is a drop-down value displaying the ‘Date and Time Report was Received’ for screened in access reports. Click on the drop-down value field to view other dates. Select the correct date on which the contact took place.

The Name and Contact Date are user-entered mandatory fields. If a mistake is made, use the Delete hyperlink to remove the information entered.

The Insert button will allow additional Assessment Contact Information to be entered. The ‘Add Contacts’ hyperlink below the participants will also add those contacts to the Assessment Contact Information group box.

The screenshot shows the eWiSACWIS web application interface. At the top, the browser title is 'Case Notes - Internet Explorer'. The application header includes the logo 'eWiSACWIS' and navigation links for 'Print' and 'Help'. Below the header, case information is displayed: Case: Jones, Sally (9222753); Worker Creating Note: Cake, Caitlin C.; Worker Making Contact: Cake, Caitlin C. (with a 'Search' link); Case Note ID: 9223452; Date Entered: 12/12/2012 10:22 AM; checkboxes for 'Note Finalized' and 'Contact By Designee'. The 'Note Information' section contains fields for Date (02/06/2012), Category (Initial Assess Contact), Begin Time (01:00 AM), End Time (00:00 AM), Duration (0000.0), Type (Initial Face-to-Face), Type Detail, Face-to-Face Location (Home Visit), and Face-to-Face Result (Occurred). A 'Participants' list is shown with a dropdown menu containing: Jones, Sally (Reference Person), Jones, Tammy (Bio Child), Jones, Tommy (Bio Child), Jones-Blahnik, Marianne A. (Bio Child), Smith, Sam (Corp/Co. Counsel), and Unknown, Unknown (Present Spouse). An 'Add Contacts' link is present. The 'Assessment Contact Information' section shows a 'Begin Date' dropdown set to 02/03/2012 12:25 PM and a table with two rows of contact data:

| Name | Affiliation | Title | Contact Date | Time | AM/PM | Action |
|--------------|-------------|-------|--------------|-------|-------|--------|
| Jones, Sally | | | 02/06/2012 | 01:00 | PM | Delete |
| Jones, Tommy | | | 02/06/2012 | 01:00 | PM | Delete |

An 'Insert' button is located below the table. At the bottom, there are 'Options' including 'Print Note', 'Go', 'Insert Correction Note', 'Clear Fields', 'Create', 'Save', and 'Close'. The browser zoom level is set to 100%.

9. Finally, when completed, click on Save and Close. This information will be saved under the Assessment icon and will pre-fill the Initial Assessment with the contacts names and dates.

10. To create an Initial Assessment Contact from the Assessment, click on the pending Assessment from your desktop. This will open the Assessment page.

Jones, Sally (9222753)

Case details:
 CPS Family - Initial Assessment
 BMCW-Admin
 Intensive In-Home
 Open OHP exists for associated participant(s)

Case address:
 123 Main Street
 Waldo, WI 53093
 (262) 555-1212

Primary worker:
 Daisy, Dan
 (440) 943-7690
dan.daisy@wisconsin.gov

Actions:

View case information

- Access Reports
- Agreements and Notices
- Assessments
- Assets and Income
- Assignments
- Background Checks
- Case/Permanency Plan
- Eligibility
- Narratives
- Placements
- Planning
- Related People
- Safety
- Serious Incident Notification

Assessments

| Assessment | Date | Status | Actions |
|----------------------------|------------|---------------|---|
| Assessment | 06/14/2017 | Pending | |
| Assessment | 06/08/2015 | Substantiated | |
| Assessment | 10/01/2012 | Substantiated | Serious Incident Notification |
| Assessment | 02/06/2012 | Substantiated | Serious Incident Notification |

11. On the Assessment page, click on the Results tab. In the Initial Face-to-Face Contact Information group box, click on the Create Initial Face-to-Face Contact Note hyperlink. This will open the Case Note page.

Assessment - Internet Explorer

eWiSACWIS Resource TM Print Spell Check Help ?

Assessment
 Name: Jones, Sally Assessment ID: 9222559 Status: Open

Report
 Response Time: Within 24 - 48 Hours Date: 06/12/2017

Participants Basic Allegations Contacts **Results**

Assessment Results
 Result: Pending

Disposition

Family RA Future A/N
 Abuse Score:
 Neglect Score:
 Risk Level:

Safety Assessment
 Safety Decision:

Strengths and Needs
 Needs Level:

Initial Face-to-Face Contact Information
 Initial Face-to-Face Must Occur By: 06/14/2017 11:00 PM [CPS Report 9240803](#)
 Initial Face-to-Face Documented: 12/12/2017 11:41 AM [Case Note ID 9224575](#) [Create Initial Face-to-Face Contact Note](#)

Birth to Three Referral Information
 Alleged Victim DOB **Referred**

Options:

100%

12. On the Case Note page, the Category and Type will pre-fill.

The screenshot shows the eWiSACWIS Case Notes page in Internet Explorer. The page header includes the eWiSACWIS logo and navigation links for Print and Help. The main content area is divided into several sections:

- Case Information:** Case: Jones, Sally (9222753); Worker Creating Note: Cake, Caitlin C.; Worker Making Contact: Cake, Caitlin C. Search; Case Note ID: 9223452; Date Entered: 12/12/2012 10:22 AM; Note Finalized; Contact By Designee.
- Note Information:**
 - Date: 02/06/2012
 - Begin Time: 01:00 (AM/PM)
 - End Time: 00:00 (AM/PM)
 - Duration: 0000.0
 - Category: Initl Assess Contact
 - Type: Initial Face-to-Face
 - Type Detail: [Empty]
 - Face-to-Face Location: [Drop-down]
 - Face-to-Face Result: [Drop-down]
 - Participants: Jones, Sally (Reference Person), Jones, Tammy (Bio Child), Jones, Tommy (Bio Child), Jones-Blahnik, Maryanne A. (Bio Child), Smith, Sam (Corp/Co. Counsel), Unknown, Unknown (Present Spouse)
 - View Inactive Participants:
 - Billable:
 - Hold down the 'Ctrl' key for multi-selection. [Add Contacts](#)
- Narrative:** Case Note 1/1 Details [Create Structured Case Note](#). Enter narrative text here... [Text area]
- Assessment Contact Information:** [Collapsible section]
- Options:** [Drop-down] [Go](#)
- Buttons:** [Insert Correction Note](#), [Clear Fields](#), [Create](#), [Save](#), [Close](#)

13. In the Note Information group box, enter the Date and Begin Time.

14. The Face-to-Face Location and Face-to-Face Result are drop-down value fields. Select a value that best describes the Assessment Contact Type.

15. The Participants in the case are shown on the right side. You can use 'Ctrl' key to multi-select additional participants.

16. The Narrative group box is a user-entered field. Enter a narrative describing what happened during contact with the individual(s). For case worker contact policy guidance, move your mouse over the 'Details' flair.

17. Scroll to the bottom of the page to update the Assessment Contact Information group box.

18. The Begin Date field is a drop-down value displaying the ‘Date and Time Report was Received’ for screened in access reports. Click on the drop-down value field to view other dates. Select the correct date on which the contact took place.

The Name and Contact Date are user-entered mandatory fields. If a mistake is made, use the Delete hyperlink to remove the information entered.

The Insert button will allow additional Assessment Contact Information to be entered. The ‘Add Contacts’ hyperlink below the participants will also add those contacts to the Assessment Contact Information group box.

The screenshot shows the eWiSACWIS web application interface. At the top, there is a header with the eWiSACWIS logo and navigation links like 'Print' and 'Help'. Below the header, there are fields for 'Case: Jones, Sally (9222753)', 'Worker Creating Note: Cake, Caitlin C.', and 'Worker Making Contact: Cake, Caitlin C. Search'. There are also fields for 'Case Note ID: 9223452', 'Date Entered: 12/12/2012 10:22 AM', and checkboxes for 'Note Finalized' and 'Contact By Designee'.

The main section is titled 'Note Information'. It contains several fields:

- Date:** 02/06/2012
- Category:** Initl Assess Contact
- Begin Time:** 01:00 AM
- End Time:** 00:00 AM
- Duration:** 0000.0
- Billable:**
- Type:** Initial Face-to-Face
- Type Detail:** (empty)
- Face-to-Face Location:** Home Visit
- Face-to-Face Result:** Occurred
- Participants:** A list box containing: Jones, Sally (Reference Person), Jones, Tammy (Bio Child), Jones, Tommy (Bio Child), Jones-Blahnik, Maryanne A. (Bio Child), Smith, Sam (Corp/Co. Counsel), and Unknown, Unknown (Present Spouse).
- View Inactive Participants:**
- Add Contacts:** [Add Contacts](#) (with a note: 'Hold down the 'Ctrl' key for multi-selection')

Below the 'Note Information' section is a text area for 'Case Note 1/1 Details' with the prompt 'Enter narrative text here...' and a 'Create Structured Case Note' link.

The next section is 'Assessment Contact Information'. It has a 'Begin Date' dropdown set to '02/03/2012 12:25 PM'. Below this is a table with columns: Name, Affiliation, Title, Contact Date, and an empty column. The table contains two rows:

| Name | Affiliation | Title | Contact Date | |
|--------------|-------------|-------|---------------------|------------------------|
| Jones, Sally | | | 02/06/2012 01:00 PM | Delete |
| Jones, Tommy | | | 02/06/2012 01:00 PM | Delete |

At the bottom right of the 'Assessment Contact Information' section is an 'Insert' button. At the very bottom of the page, there are 'Options:' with a 'Print Note' button and a 'Go' button, and a row of buttons: 'Insert Correction Note', 'Clear Fields', 'Create', 'Save', and 'Close'.

19. Finally, when completed, click on Save and Close. This information will be saved under the Assessment icon and will pre-fill the Initial Assessment with the contacts names and dates.