

# Initial Face-to-Face Contacts

**Note:** In order to create an initial face-to-face contact, an assignment to the case is not needed.

## Introduction

The following guide walks through multiple ways of creating an Initial Face-to-Face Contact for Assessment, and how to create an Initial Face-to-Face Contact for Ongoing.

## Assessment Face-to-Face Contacts

**Note:** In order to create an Assessment Face-to-Face Contact, there must be a pending Assessment for the case. There are three ways to create an Assessment Face-to-Face Contact: the Create Case Work page, the Actions hyperlink next to the case, and the Assessment page.

1. To create an Assessment Initial Face-to-Face Contact via the Create Case Work page, go to the Cases tab and click the Create Case Work hyperlink [Create case work](#). On the Create Case Work page, select 'Initial Face-to-Face Contact' from the Assessment drop-down. Select the case and the participant(s) and click the Create button [Create](#). This will open the Case Notes page.
  - You can also create a case note by selecting 'Create Case Note' from the Actions drop-down next to the specific case. This will open the Case Notes page.

The screenshot shows the 'Create Case Items' interface in the eWiSACWIS system. On the left, there is a list of categories: Administration, Adoption, Agreements/Notices, Assessment, Case/Perm Plan, Education, Eligibility, ICPC, ICWA, Imaging, Legal, and Narrative. Each category has a corresponding dropdown menu. The 'Assessment' dropdown is currently open, and 'Initial Face-to-Face Contact' is selected and highlighted with a red border. On the right side, there is a 'Cases' panel displaying a list of participants. The first participant, 'Aardvark, Amy B. (9223581)', is highlighted in blue. Below the 'Cases' panel, there is a 'Case Participants' section with a note: 'Hold down the 'Ctrl' key for multi-selection'. Below this note, a list of participants is visible, including 'Aardvark, Abigail A., Biological Child (9226560)'.

2. On the Case Notes page, enter the date the contact occurred in the Date field. The Category and Type will pre-fill. Enter the Face-to-Face Location, Face-to-Face Result, and the Narrative. Use the

[Search](#) hyperlink to search out the Worker Making Contact if that is different than the Worker Creating Note. In the Participants section, you can change the selected participant(s) by clicking on the desired name(s). Use the 'Ctrl' key to select more than one participant. Click the [Add Contacts](#) hyperlink to add the participant(s) to the Assessment Contact Information section.

**Note:** Per policy, agencies may use other professional staff as designees to complete face-to-face contacts. Staff includes those trained to assess safety, facilitate permanence, ensure a child's well-being, and evaluate the progress of a child and family's case. To indicate a Case Note completed by a designee, select the 'Contact by Designee' checkbox.

The screenshot shows the eWiSACWIS Case Notes interface. At the top, there are fields for Case: Aardvark, Amy B (9222933), Worker Creating Note: Cake, Caitlin C., and Worker Making Contact: Cake, Caitlin C. with a Search button. Below this, Case Note ID and Date Entered (06/16/2020 06:32 PM) are shown, along with checkboxes for Note Finalized and Contact By Designee (which is circled in red). The Note Information section includes fields for Date (06/08/2020), Category (Initl Assess Contact), Begin Time (11:45 AM), End Time (00:00), 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 visible, including Aardvark, Alan (Bio Child), Aardvark, Abigail A., III (Bio Child), Aardvark, Adam A. (Bio Child), Aardvark, Amy B. (Reference Person), Johnson, Baby (Bio Child), and Mae, Sally (Grandparent). The Narrative section shows Case Note 1/1 with a text area for the visit. The Assessment Contact Information section has a Begin Date dropdown and a table with columns for Name, Affiliation, Title, and Contact Date. The table contains three rows of data for Aardvark, Adam A., Aardvark, Amy B., and Mae, Sally, each with a date of 06/08/2020 and a time of 11:45 AM, and a Delete button. At the bottom, there are buttons for Insert Correction Note, Clear Fields, Create, Save, and Close.

3. The participants selected in the Participants section at the top of the page pre-fill in the Assessment Contact Information section. To add participants not listed in the Participants box above, click Insert. The Begin Date is the date and time the Assessment this note is being linked to was created.

Case Notes - Internet Explorer

**eWiSACWIS** Print Help

Case: Aardvark, Amy B (9222933) Worker Creating Note: Cake, Caitlin C. Worker Making Contact: Cake, Caitlin C. [Search](#)

Case Note ID: Date Entered: 06/16/2020 06:32 PM  Note Finalized  Contact By Designee

**Note Information**

Date: 06/08/2020 Category: Initial Assess Contact  View Inactive Participants

Begin Time: 11:45 AM  AM  PM Type: Initial Face-to-Face Participants:

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

- Aardvarck, Alan (Bio Child)
- Aardvark, Abigail A., III (Bio Child)
- Aardvark, Adam A. (Bio Child)
- Aardvark, Amy B. (Reference Person)
- Johnson, Baby (Bio Child)
- Mae, Sally (Grandparent)

Duration: 0000.0 **Face-to-Face Location:** Home Visit    Hold down the 'Ctrl' key for multi-selection

Billable Face-to-Face Result: Occurred

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**Assessment Contact Information**

Assessment Contact Information

Begin Date:

Name	Affiliation	Title	Contact Date	
Aardvark, Adam A.	<input type="text"/>	<input type="text"/>	06/08/2020 11:45 AM <input checked="" type="radio"/> AM <input type="radio"/> PM	<a href="#">Delete</a>
Aardvark, Amy B.	<input type="text"/>	<input type="text"/>	06/08/2020 11:45 AM <input checked="" type="radio"/> AM <input type="radio"/> PM	<a href="#">Delete</a>
Mae, Sally	<input type="text"/>	<input type="text"/>	06/08/2020 11:45 AM <input checked="" type="radio"/> AM <input type="radio"/> PM	<a href="#">Delete</a>

4. Click the Save button to save the page, then click the Close button.
5. To create an Assessment Initial Face-to-Face Contact via the Assessment page, access the pending Assessment from your desktop. This will open the Assessment page.

Parent, Mom Q., V ( ) Restricted Case Safe at Home

Case details: CPS Family - Ongoing Case address: Oneida - Rhinelanders Primary worker: Williams, Alli State: ewuat25@dhsf.state.wi.us Actions:

Open OHP exists for associated participant(s)

**View case information**

Access Reports Assessments Assets and Income Assignments

Eligibility ICWA Narratives Placements

Planning Related People Safety Serious Incident Notification

**Assessments**

Initial Assessment - Primary	05/31/2024	Pending
Initial Assessment - Primary	05/21/2024	Substantiated
Initial Assessment - Primary	05/29/2024	Unsubstantiated
Initial Assessment - Secondary	05/23/2024	Substantiated
Initial Assessment - Primary	05/16/2024	Unsubstantiated

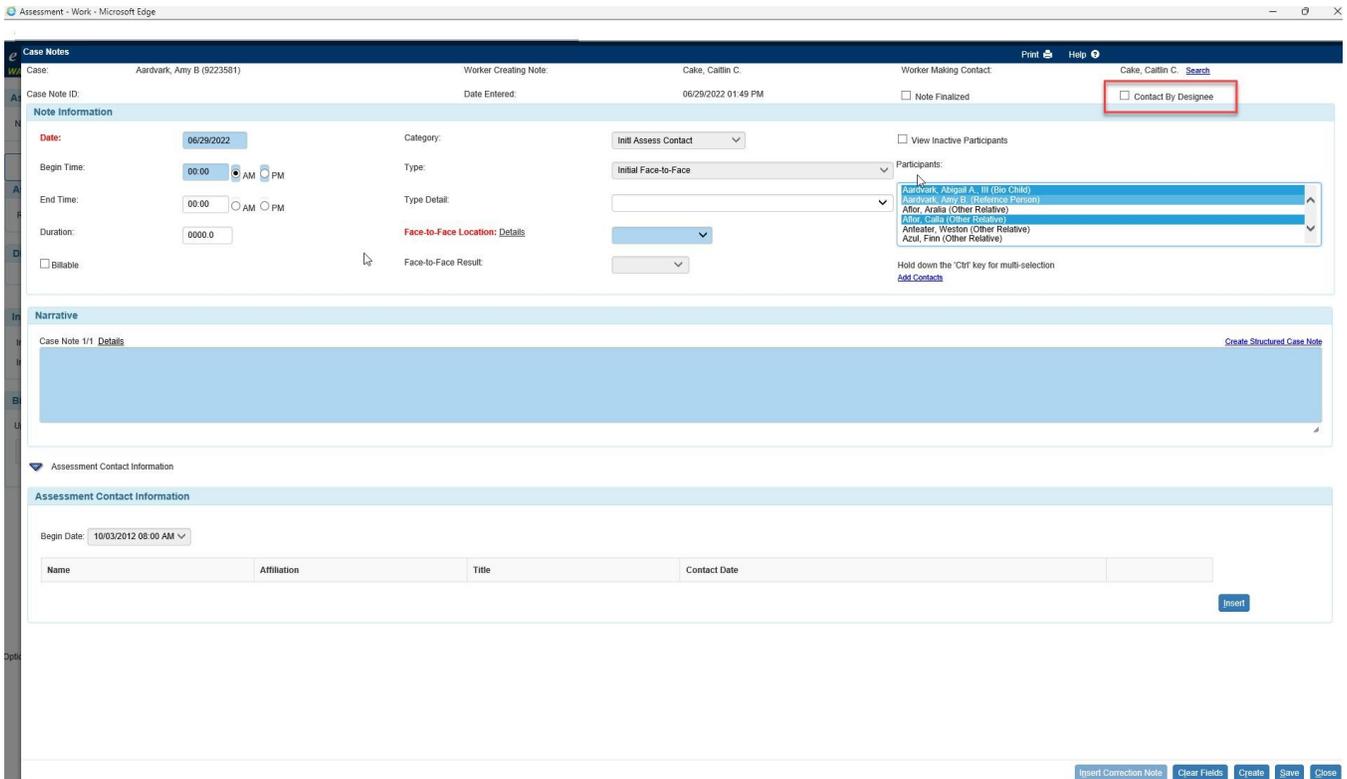
[Serious Incident Notification](#) [90-Day Summary](#)

- On the Assessment page, click on the Summary tab. In the Initial Face-to-Face Contact Information section, click on the [Create Initial Face-to-Face Contact Note](#) hyperlink. This will open the Case Notes page.

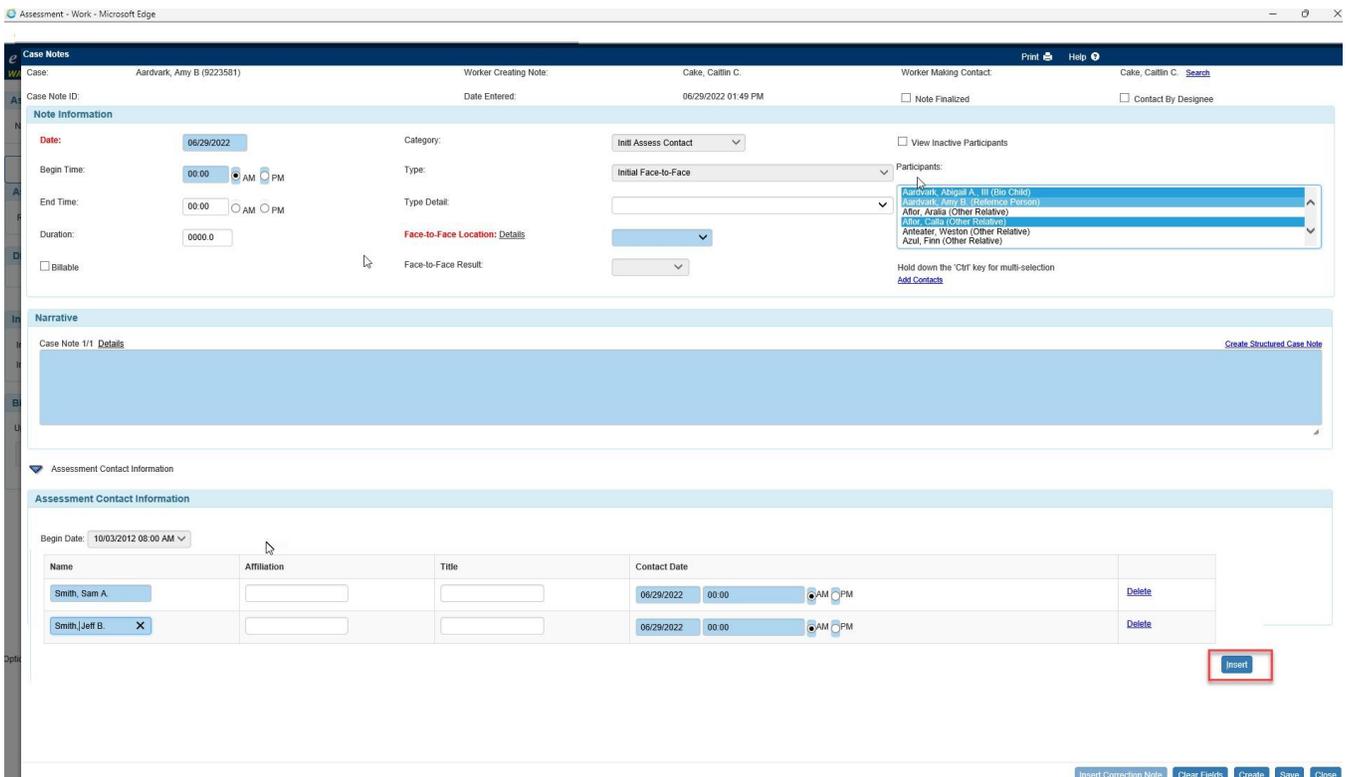
The screenshot shows the eWiSACWIS interface. At the top left is the logo 'eWiSACWIS' and a 'Print' icon at the top right. Below the header are three main sections: 'Assessment', 'Report', and 'Safety Assessment'. The 'Assessment' section displays 'Name: Referral\_ParentOne', 'Assessment ID: [redacted]', 'Result: Pending', and 'Type: IA Primary'. The 'Report' section shows 'Date: 06/03/2024' and 'Response Time: Within 5 business days'. The 'Safety Assessment' section has a 'Safety Decision:' field. Below these are navigation tabs: 'Participants', 'Safety', 'Family', 'Adult/Parent', 'Child/Youth', 'Determinations', and 'Summary' (which is highlighted in blue). Under the 'Summary' tab, there are two main sections: 'Birth to Three Referral Information' and 'Initial Face-to-Face Contact Information'. The 'Initial Face-to-Face Contact Information' section contains fields for 'Initial Face-to-Face Must Occur By:', 'Initial Face-to-Face Documented:', and a 'Contact History' link. A red box highlights the 'Create Initial Face-to-Face Contact Note' button in the 'Must Occur By' field. At the bottom, there is an 'Options:' dropdown menu with a 'Go' button, and 'Save' and 'Close' buttons on the right.

- On the Case Notes page, enter the date the contact occurred in the Date field. The Category and Type will pre-fill. Enter the Face-to-Face Location, Face-to-Face Result, and the Narrative. Use the [Search](#) hyperlink to search out the Worker Making Contact if that is different than the Worker Creating Note. In the Participants section, you can change the selected participant(s) by clicking on the desired name(s). Use the 'Ctrl' key to select more than one participant. Click the [Add Contacts](#) hyperlink to add the participant(s) to the Assessment Contact Information section.

**Note:** Per policy, agencies may use other professional staff as designees to complete face-to-face contacts. Staff includes those trained to assess safety, facilitate permanence, ensure a child's well-being, and evaluate the progress of a child and family's case. To indicate a Case Note completed by a designee, select the 'Contact by Designee' checkbox.



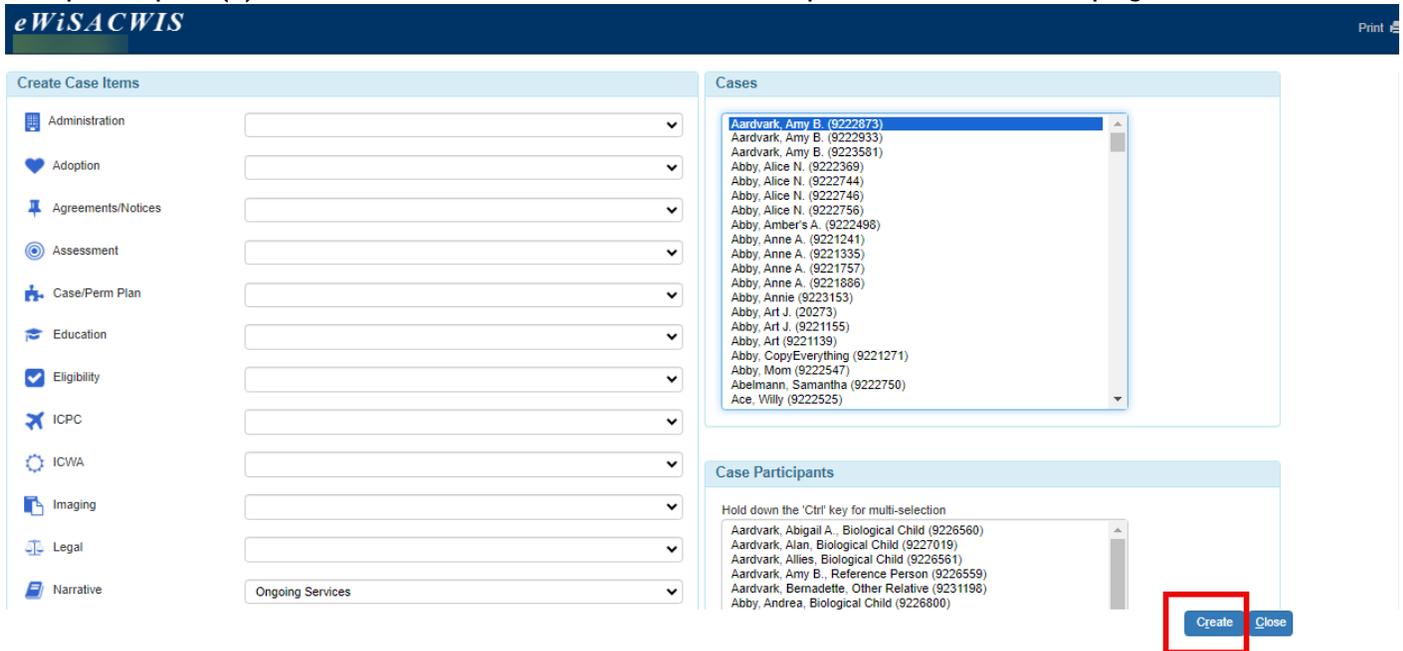
- The participants selected in the Participants section at the top of the page pre-fill in the Assessment Contact Information section. To add participants not listed in the Participants box above, click Insert. The Begin Date is the date and time the Assessment this note is being linked to was created.



9. Click the Save button to save the page, then click the Close button.

### Ongoing Face-to-Face Contacts

10. To create an Ongoing Initial Face-to-Face Contact, go to the Cases tab and click the Create Case Work hyperlink [Create case work](#) to open the Case Work page or select Create Case Note from the Actions drop-down next to the specific case to open the Case Notes page. On the Case Work page, select 'Ongoing Services' from the Narrative drop-down. Select the case and participant(s), and click the Create button. This will open the Case Notes page.



11. The Case Notes page opens. Enter the date the contact occurred in the Date field, select Initial Face-to-Face Contact for the Type, enter the Face-to-Face Location, and Face-to-Face Result. Finally, enter the Narrative.

**Note:** Per policy, agencies may use other professional staff as designees to complete face-to-face contacts. Staff includes those trained to assess safety, facilitate permanence, ensure a child's well-being, and evaluate the progress of a child and family's case. To indicate a Case Note completed by a designee, select the 'Contact by Designee' checkbox.

Case Notes - Internet Explorer

**eWiSACWIS** Print Help

Case: Aardvark, Amy B (9222933)      Worker Creating Note: Cake, Caitlin C.      Worker Making Contact: Cake, Caitlin C. [Search](#)

Case Note ID:      Date Entered: 06/16/2020 07:21 PM       Note Finalized       **Contact By Designee**

**Note Information**

**Date:** 06/08/2020      **Category:** Ongoing Services  View Inactive Participants

**Begin Time:** 11:45  AM  PM      **Type:** Face-to-Face  Participants:

**End Time:** 00:00  AM  PM      **Type Detail:**    
 Aardvarck, Alan (Bio Child)  
 Aardvark, Abigail A., III (Bio Child)  
 Aardvark, Adam A. (Bio Child)  
 Aardvark, Amy B. (Reference Person)  
 Johnson, Baby (Bio Child)  
 Mae, Sally (Grandparent)

**Duration:** 0000.0      **Face-to-Face Location:** Home Visit    
 Details

Billable      **Face-to-Face Result:** Occurred       Hold down the 'Ctrl' key for multi-selection

**Narrative**

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

This visit...

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

12. Click the Save button to save the page, then click the Close button.