Initial Assessment
How Do I Guide

Initial Assessment

Assessment

How Do I…?	Selections	Tips & Guidelines
Initiate assessment	▪ Click Create > Case Work > Assessment > Assessment. ▪ Click the appropriate case. ▪ Click the Create button. ▪ On the Assessment/Report Link page, click the checkbox for the applicable CPS Report(s). Click Continue. ▪ On the Assessment page, enter the applicable data/values.	*The initial assessment must be completed within the policy timeframes of a CPS Report being linked to a case or used to create a case. An Assessment Due tickler will appear on the Ticklers tab before the due date. The tickler will be deleted once the supervisor approves the assessment.*
Link additional CPS report to assessment	▪ On the Cases outliner, click the appropriate Case icon. ▪ Click Assessment icon> pending Assessment link. ▪ On the Participants tab, select Link Report to Assessment from the Options list. ▪ Click the checkbox for the appropriate CPS Report on the Assessment Report Link page. Click Continue. ▪ Click Save and click Close.	*A CPS report can only be linked to a pending assessment (i.e., not completed approved assessments).*
View/update assessment	▪ On the Cases outliner, click the appropriate Case icon. ▪ Click Assessment icon> pending Assessment link. ▪ Enter the applicable data/values.	*This will allow you to continue working on an assessment that you have created, but not completed.*

Add participant to assessment	▪ On the Cases outliner, click on the case name link.
	▪ On the Maintain Case page/Participants tab, click the Insert button.
	▪ On the Search Person page, enter the applicable data/values and click the Search button.
	  ▪ For a match: Click the select link for the applicable person and click Continue.
	  ▪ For no match: If displayed, click the Close button on the Validation Errors web page dialog box on the Search page. Click the Create button and enter the applicable data/values on the Person Management page. Click Save > Click Close.
	
	Note: Once the search activity is completed and the participant is added to the case, click the Insert button on the Assessment page/ Participants tab to select/add the participant.
		After completing the Person Management page to create the record for a new participant, you will be returned to the Search Person page to complete the search. Click Continue to return to the Participants tab.
		
		If a person is part of an intake, but his/her name is unknown, when entering the intake, log the first and/or last name as "unknown". Be sure to update the correct Unknown, Unknown person record as additional information about the person is learned.

Notify DSP of Serious Incidents	▪ Serious Incident Notifications can be sent at any time during the assessment process. ▪ On the Assessment page/Results tab, Select Serious Incident Notification from Options list. Click Go. Select the 'Send to DCF' checkbox and save/close the page.	*Act 78 requires county agencies and BMCW to report these incidents to the DSP within 2 working days of the agency learning about the incident.*

IA-Primary

How Do I…?	Selections	Tips & Guidelines
Document allegation of abuse/neglect by primary	▪ On the Cases outliner, click the appropriate Case icon. ▪ Click Assessment icon> pending Assessment link. ▪ On the Basic tab, click the Options list > IA Primary. Click Go. ▪ On the Initial Assessment-Primary page, enter the applicable data/values.	*Click the IAPC Completed checkbox on the Initial Assessment-Primary page to complete the IA-PC. <u>This checkbox must be selected in order to approve the assessment.</u>* *NOTE: For Alternative Response pilot counties – select the 'Alternative' IA Primary type value to switch to an Alternative Response assessment.*

Initial Assessment (Continued)

Document initial face-to-face contact	▪ Click Create > Case Work > Assessment > Initial Face to Face Contact. ▪ Click the appropriate case. Click appropriate participant. ▪ Click the Create button. ▪ Alternately, the Initial Face to Face Contact can be documented by clicking the "Create Initial Face-to-Face Contact Note" hyperlink on the Results tab of the Assessment page. ▪ On the Case Notes page, enter date occurred, and enter the case note. ▪ Scroll down to the Assessment Contact Information group box, select the appropriate begin date of the pending assessment from the drop-down list in the Begin Date field and enter the assessment contact information. Click Save > Click Close.	*A case note item documenting the initial face-to-face contact will appear under the Assessment subject on your Cases expando.* *The Assessment page must be created and pending in order for an assessment begin date to appear in the Assessment Contact Information Group Box.* *If you do not select participants on the Create Case Work page, you can select the case participants or collaterals on the Case Notes page and click the Add Contacts link to pre-fill the names into the Assessment Contact Information box.* *You can deselect participants by using the Ctrl key and clicking the selected participants from the Participants' group box. The deselected participants will be deleted from the Assessment Contact Information group box.*
Document an assessment contact (other than initial face-to-face contact)	▪ Click Create > Case Work > Assessment > Assessment Contact. ▪ Click the appropriate case and/or case participant. ▪ Click the Create button. ▪ On the Case Notes page, enter date occurred and enter the case note. ▪ Scroll down to the Assessment Contact Information group box, click the appropriate begin date of the pending assessment from the drop-down list in the Begin Date field and enter the assessment contact information. Click Save > Click Close.	*A case note item documenting the assessment contact will appear under the Assessment icon on your Cases outliner.* *Assessment contact information entered on the Case Notes page will also appear on the Assessment page/Contacts tab.* *If you do not select participants on the Create Case Work page, you can select the case participants or collaterals on the Case Notes page and click the Add Contacts link to pre-fill the names into the Assessment Contact Information box.* *You can deselect participants by using the Ctrl key and clicking the selected participants from the Participants' group box. The deselected participants will be deleted from the Assessment Contact Information group box.*
Determine safety/ risk (primary alleged maltreater)	▪ On the Cases outliner, click appropriate Case icon. ▪ Click Assessment icon> pending Assessment link. ▪ On the Basic tab, click the Options list > IA Primary. Click Go. ▪ On the Initial Assessment-Primary page, enter the applicable data / values. *Note: The Safety Assessment, Analysis and Plan created through completion of the Initial Assessment – Primary, is saved as separate item under the Assessment icon on the desktop outliner.*	*On the IA-Primary page, there are four of seven tabs where you must record risk and safety information concerning maltreatment, child functioning, adult functioning, and parenting practices. You must complete each tab, the associated risks and safety questions before you can save the information.*

Initial Assessment (Continued)

If necessary, switch assessment type	▪ On the Basic tab, click the Options list > Switch Assessment Type. Click Go.	
Complete initial assessment	▪ On the Assessment page/Results tab, Select IA Checklist from Options list. Click Go. ▪ Click applicable IA Checklist/check boxes. Click Save/Close. ▪ On the Assessment page/Participants tab, select Approval from Options list. Click Go Button. ▪ Select Approve on Approval History page. Click Continue. ▪ Click Save and Close on Assessment page. ▪ If the result of the Initial Assessment is 'Substantiated' then a Maltreater Right to Review letter must be completed and mailed within 24 hrs.	*The Initial Assessment - Primary template may be accessed from the IA-Primary page by selecting IA Primary from Options list and clicking Go.* *Before you can submit the initial assessment for approval, you must enter a determination for each maltreatment determination (entered on the allegation pop-up page) and a determination for each maltreater determination on the Allegations tab of the Assessment page. If multiple allegations exist, a scroll bar will display allowing you to scroll down to view each allegation. If any of the allegations are substantiated, the status of the Assessment will be substantiated.* *<u>The IAP Completed checkbox on the IA Primary page as well as the Completed checkbox on the associated Safety Assessment, Analysis and Plan page must be checked to approve the assessment.</u>*

Secondary or Non Caregivers

How Do I…?	Selections	Tips & Guidelines
Document allegation of abuse/neglect by secondary/ non-caregiver	▪ On the Cases outliner, click appropriate Case icon. ▪ Click Assessment icon> pending Assessment link. ▪ On the Basic tab, click the Options list > IA Secondary or Non Caregivers. Click Go button ▪ On the Initial Assessment- Secondary or Non Caregivers page, enter the applicable data/values.	
If necessary, switch assessment type	▪ On the Basic tab, click the Options list > Switch Assessment Type. Click Go.	
Complete initial assessment	▪ On the Assessment page/Results tab, Select IA Checklist from Options list. ▪ Click applicable IA Checklist/check boxes. Click Save/Close. ▪ On the Assessment page/Participants tab, select Approval from Options list. Click Go Button. ▪ Select Approve on Approval History page. Click Continue. ▪ Click Save and Close on Assessment page.	*The Initial Assessment – Secondary or Non Caregivers template may be accessed from the Secondary or Non Caregivers page/Summary tab by selecting IA Secondary or Non Caregivers from Options list and clicking Go.* *The IASC Completed checkbox on the IA-Secondary or Non Caregivers page must be checked to approve the Assessment.*

Reviews & Appeals

Reviews / Appeals

How Do I…?	Selections	Tips & Guidelines
Document a Review for a Substantiated Maltreater	▪ Method 1: On the Reviews tab of a Substantiated Assessment, enter a date in the Response Received date field. Then click the Create Review hyperlink. Or Method 2: On the Cases outliner, click Utilities > Maltreater Appeal. Then click the Search hyperlink and search out the Maltreater and select the radio button next to the Maltreater ID. ▪ Once the substantiated Assessments are returned to the Appeals Record page, select the 'Create Review' link. ▪ On the Review Details page, enter the applicable data/values.	*Only workers with 'create reviews' security can enter review details.*
Void a Review	▪ On the Review Details page, select the 'Void Appeal' item under the Options dropdown.	*Only supervisors with 'level 3' supervisory approval can void an appeal record.*
Document an Appeal for a Substantiated Maltreater.	▪ On the Cases outliner, click Utilities > Maltreater Appeal ▪ Click the Search hyperlink and search out the Maltreater and select the radio button next to the Maltreater ID. ▪ Once the substantiated Assessments are returned to the page, select the 'Create Appeal' link. ▪ On the Appeal Selection page, select the appropriate allegations. ▪ On the Appeal Details page, enter the applicable data/values.	*Only workers with 'create appeals' security can enter appeal results.*
Void an Appeal	▪ On the Cases outliner, click Utilities > Maltreater Appeal ▪ Click the Search hyperlink and search out the Maltreater and select the radio button next to the Maltreater ID. ▪ Once the assessment information is returned to the page, select the 'View' link next to the appeal row that you need to void. ▪ On the Appeal Details page, select the 'Void Appeal' item under the Options dropdown.	*Only supervisors with 'level 3' supervisory approval can void an appeal record.*

Initial Assessment How Do I Guide

Plans

Safety Assessment, Analysis and Plan

How Do I…?	Selections	Tips & Guidelines
Establish Safety Assessment, Analysis and Plan	▪ Click Create > Case Work > Safety Assessment > Safety Assessment, Analysis and Plan. ▪ Click the appropriate case. ▪ Click the Create button. ▪ On the Safety Assessment, Analysis and Planning Selection page, choose copy or create.	
Update Safety Threat narrative and Safety Services	▪ On the Safety Assessment tab, complete the Safety Threat questions. ▪ On the Description of Safety Threats document in narrative form a description for each "Yes" response. ▪ Answer the questions on the Plan Analysis tab and add services via the Safety Plan Services page when applicable.	*If all analysis questions are "Yes" then add safety services by selecting the Add/Edit Services link on the Description of Safety Threat Tab and answer all required narrative text fields.*
Update/complete Safety Assessment, Analysis and Plan	▪ On the Cases outliner, click appropriate Case icon. ▪ Click Planning icon> Safety Assessment, Analysis and Plan link. ▪ On the Safety Assessment, Analysis and Plan page, enter the applicable data/values. ▪ On the Safety Assessment tab, select Approval from Options list. Click Save and click Close.	*The Safety Analysis and Plan and Safety Assessment templates may be accessed from any tab by selecting the appropriate value from the Options list.*

Out of Home Safety Plan

How Do I…?	Selections	Tips & Guidelines
Establish out of home safety plan	▪ Click Create > Case Work > Planning > Out of Home Safety Plan. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the Out of Home Safety and Planning page, enter the applicable data/values.	
Add new placement information	▪ On the Cases expando, click appropriate Case icon. ▪ Click Planning icon > pending out of home safety plan link. ▪ On the OHSP Placement Safety tab, click the Search link. ▪ On the Provider Search page, enter the applicable data/values and click the Search button. ▪ Click the provider and click Continue. *Note: If changing existing placement information, clicking the Remove link will remove the existing placement information and a Search link will display.*	*The ICWA Placement Provider Options box on the OHSP Jurisdiction tab contains six questions related to the placement of a Native American Indian child.*
Update/complete out of home safety plan	▪ On the Cases expando, click appropriate Case icon. ▪ Click Planning > pending out of home safety plan link. ▪ On the Out of Home Safety Plan page, enter the applicable data/values. ▪ Select Approval from Options list, click Go. ▪ Select Approve and click Continue. ▪ Click Save and click Close.	*The Out of Home Safety Plan template may be accessed via the OHSP Placement Safety tab by clicking the Text button.*

Plans	Terminate out of home safety plan	▪ On the Cases expando, click appropriate Case icon. ▪ Click Planning icon> ongoing out of home safety plan link. ▪ On the Out of Home Safety Plan page/ Jurisdiction tab, select Terminate from Options list. Click Go. ▪ On the Terminate Plan page, enter the applicable data/values. ▪ Select Approval from Options list, Click Go. ▪ Select Approve and Click Continue. ▪ Click Save and click Close.	
	Family Interaction Plan		
	Complete family interaction plan	▪ Click Create > Case Work > Planning > Family Interaction Plan. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the Forms page, select Family Interaction Plan from Options list. Click Go button. ▪ On the Family Interaction Plan template, enter the applicable data/values. ▪ Click Close Document and Return to eWiSACWIS. ▪ Click Save and click Close.	

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