



# California WebSDM

## California WebSDM Transition Guide

October 2015



California Department of Social Services

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## Introduction

The purpose of this manual is to transition current users of the California WebSDM application to the new version of WebSDM that will be released on November 1, 2015. The new version of WebSDM is being released at the same time as the new set of Structured Decision Making® (SDM) assessments.

While WebSDM will look different, the majority of its core functions will not change.

## Reasons for New Version

- The last version was released in 2006.
- The current version is very outdated and restrictive, especially for mobile devices.
- This version incorporates the new SDM® assessments.

## Major Changes

- New modern interface
- Support for mobile devices
- To Do List that shows when upcoming assessments are due (see page 3 for details)
- Optional email alerts (see page 4 for details)
- Case assessments will present household members individually for user flexibility (see page 10 for details)
- Enhanced security
- PDF export
- Cross-browser support

## Features That Are Still Available

- All previously completed assessments
- Usernames and passwords
- User-centered approach/ease of use
- Availability of definitions and support
- Types and structures of assessments (mostly; see page 10 for details)

## Additional Help and More Information

- Email the help desk: [support@sdmdata.org](mailto:support@sdmdata.org), or click  in the User Panel.
- Site tour: Click  in the User Panel
- Quick reference guides: Document Library in the Links Panel
- Tutorials: Accessed via the Links Panel
- Assessment item definitions: Available on all assessments
- FAQs in the Links and User panels

## URLs and Log-In Information

URL: <https://ca.sdmdata.org>  
Training site URL: <https://ca-training.sdmdata.org>  
Usernames: Same as the previous version.  
Passwords: Same as the previous version.

## Logging In, Home Page

The screenshot shows the SDM 'My Caseload' home page. At the top right, a navigation bar contains the user name 'Sarah Hesse', a search icon, a help icon, a user profile icon, and a 'Training' dropdown menu. On the left, a dark sidebar menu is highlighted with a red box, containing options like 'New Assessment', 'My Caseload', 'My Alerts', 'My Assessments', 'Search', 'My Unit', 'User Management', 'Document Library', 'Change Password', 'Policies & Procedures', and 'FAQs'. The main content area displays a list of cases, with three callout boxes: one for the top navigation bar, one for the 'User Panel' on the right, and one for the 'Links Panel' in the sidebar. The case list includes details for 'Baxter, Joshua', 'Harding, Adam', and 'Harding, Ann', such as Case ID, Start Date, Type, Gender, Age, and Risk Level.

Users will automatically be redirected to the new version of WebSDM after November 1, 2015. All usernames and passwords will remain the same. If users forget their passwords, they will click the **Forgot Password** link on the login page. All password reset requests are now handled via email.

The home page is the first screen users see after logging in. Users can choose one of three pages as their home page: **My Caseload**, **My Alerts**, or **My Assessments**. Supervisors can also choose **My Unit**.

### User Panel

This panel contains links to email the help desk, take a site tour, access FAQs, access the user profile, and log out.

**Note:** Users will choose their home page from the **User Profile**.

### Links Panel

The **New Assessments** panel has links to start a new, blank referral assessment (no referral information pre-populated). The **Links** panel below contains links to the following:

- **My Caseload:** Shows the user's current caseload in a series of tiles with basic case information, such as ID, start date, risk and safety status, and more. This is the default home page. See Page 3 for more information.
- **My Alerts:** Shows lists of assessments that may require action (overdue, not submitted for approval, etc.). Can opt to receive a daily summary of this information via email. See Page 4 for more information.
- **My Assessments:** Full sortable, searchable list of all assessments completed by the user. See Page 5 for more information.
- **Search:** Search for a case, referral, or assessment by ID or name.
- **User Management:** For administrators only.
- **Document Library:** Contains links to SDM definitions, P&P manual, and other user resources.
- **Change Password:** Self-explanatory.
- **Policies and Procedures:** Searchable PDF of P&P manual.
- **FAQs:** Access a list of frequently asked questions.

## My Caseload

The screenshot displays the 'My Caseload' page. At the top, the user's name 'Sarah Hesse' is visible. The main content area shows a list of cases and referrals, each with a tile containing details like Case ID, Start Date, Type, Gender, Age, and Risk Level. Red boxes highlight the 'User tools' (search and sort options), 'Case/Referral tiles' (individual case details), 'Alert' (red icons with numbers indicating incomplete or overdue assessments), and 'To Do List' (upcoming assessments by date).

The **My Caseload** page shows all cases and referrals currently assigned to the user. This page can be selected as the user's home page from the **User Profile** in the User Panel

## User Tools

- **Toggle:** Switch between a tiled view of cases/referrals to a list view.
- **Search:** Search the caseload for a case or referral name.
- **Sort:** Sort cases/referral tiles by name, type, date, risk, incomplete, or overdue.

## Case/Referral Tiles

Each tile contains basic information, including name, ID, start date, risk and safety, and demographic information. Click the **Case** (□) or **Referral** (🔗) icon to open a list of assessments for the case or referral.

## Alert

The **Alert** icons identify any cases/referrals with incomplete or overdue assessments. The number in the icon indicates how many assessments are incomplete or overdue.

**Incomplete:** 3

**Overdue:** 2

## To Do List: New!

This new feature gives users an overview of upcoming assessments:

- The default view hides past due assessments; click **Show Past Due** to see them.
- The default view also shows upcoming assessments by date; click the **View By** toggle to see assessments due by case/referral. **Note:** This view will automatically display past due assessments.
- Each assessment due for the case/referral will be listed.
- Click the **New Assessment** (📝) icon to start a new assessment.

## My Alerts

The screenshot shows the 'My Alerts' interface for Sarah Hesse. It features three main sections on the left: 'Overdue Assessments' (5 items), 'Upcoming Assessments' (4 items due in the next 3 days), and 'Incomplete Assessments' (0 items). The 'Overdue Assessments' table lists cases like 'Child Case' and 'Mother Case' with due dates and days overdue. The 'Upcoming Assessments' table lists cases like 'Child McCase' and 'Mother McCase' with due dates and days remaining. The 'Incomplete Assessments' section shows no items. On the right, an 'Alert summary' box provides a breakdown of assessment counts: Overdue (5), Upcoming (4), Incomplete (0), and Pending Approval Request (2). It also shows 'Approvals in the last 2 days' (Approved: 0, Approved with Modifications: 0) and an option to 'Send this as a daily email'. The email address is listed as 'janeworker@casdm.org'.

Due	Name	Assessment	By
6/11/2015	Child Case	Family Strengths & Needs	102 Days
6/11/2015	Mother Case	Family Strengths & Needs	102 Days
6/11/2015	Child Case	Reunification	102 Days
6/15/2015	Father Case	Family Strengths & Needs	98 Days
6/15/2015	Sister Case	Reunification	98 Days

Due	Name	Assessment	In
9/23/2015	Child McCase	Family Strengths & Needs	2 Days
9/23/2015	Mother McCase	Reunification	2 Days
9/23/2015	Brother McCase	Family Strengths & Needs	2 Days
9/23/2015	Child McCase	Risk Reassessment	2 Days

Assessments:	Count
Overdue:	5
Upcoming:	4
Incomplete:	0
Pending Approval Request:	2

Approvals in the last 2 days:	Count
Approved:	0
Approved with Modifications:	0

Email: [janeworker@casdm.org](mailto:janeworker@casdm.org)  
If this is not correct, please contact your local administrator or SDM helpdesk to update your email address.

**Alert summary**

The **My Alerts** page displays a summary of overdue and recent assessments. This page can be selected as the user's home page from the **User Profile** in the User Panel. Users will see lists of assessments with the following statuses:

- **Overdue**
- **Upcoming** in the next 3 days
- **Incomplete** for more than 5 days
- **Pending approval request** for 5 days (i.e., the completed assessment hasn't been submitted; not shown above)
- **Recently approved** within the last 2 days (not shown above)
- **Recently approved with modifications** within the last 2 days (not shown above)

Users can start a **New Assessment** (✎) or **Open** (📄) an incomplete assessment directly from the list.

### Alert Summary

The right panel provides a summary view of the page, which users can opt to receive in a daily email.

### My Alerts for Supervisors

The supervisor version of the **My Alerts** page is very similar to the worker version, but it also includes the following supervisor-specific sections:

- **Recent approval requests** (received in the last 2 days)
- **Overdue approvals** (approval requested more than 5 days ago)

The other sections mimic the worker version, but most will not contain any assessments unless the supervisor also has case/referral assignments.

Supervisors can **open** (📄) an assessment from this list to edit as needed and approve. Supervisors also have the option of receiving a daily alert summary by email.

## My Assessments

The screenshot shows the 'My Assessments' page. At the top, there is a search bar with a search icon, a 'Select Status...' dropdown, and a 'Date Range...' field. Below this is a table with the following columns: Updated, ID, Name, Creation Date, Type, and Status. The table contains several rows of assessment data. A red box highlights the search bar area, and another red box highlights the three-dot 'Assessment Action icon' in the Status column of one of the rows.

The **My Assessments** page displays all assessments completed by the user. This page can be selected as the user's home page from the **User Profile** in the User Panel.

- Assessments are listed in chronological order by most recent update date.
- Columns include updated date, ID, name, creation date, assessment type, and status. Click a heading to sort.
- Click the **Open Assessment** (📄) icon next to any assessment to view it.
- Click the **Assessment Action** (⋮) icon to see available actions for the assessment. See the **Assessment Actions** table below for more information on what actions are available for an assessment, based on its status.

### Search Options

Users can search by name, ID, or date range (e.g., assessments completed in 2015, or from January to March 2014). Users can also filter the list by choosing an assessment status from the **Select Status** drop-down menu.

### Status

The **Status** column can be sorted to group assessments with the same status. Either sorting the status column or selecting **Approval Submitted** from the **Select Status** drop-down menu is the best way for workers to find assessments that have submitted for approval but have not yet been approved.

### Assessment Actions

Assessment Status	Meaning	Available Actions
Incomplete	Not all required items have been completed.	<ul style="list-style-type: none"> <li>• Open to complete</li> <li>• Delete</li> </ul>
Complete	All required items have been completed; has not been sent for approval.	<ul style="list-style-type: none"> <li>• Open to edit</li> <li>• Submit for approval</li> <li>• PDF (not recommended)</li> <li>• Delete</li> </ul>
Submitted	Has been sent for approval but has not been approved by supervisor.	<ul style="list-style-type: none"> <li>• Open* (as read-only)</li> <li>• Recall (to edit)</li> <li>• Redirect approval</li> <li>• PDF (not recommended)</li> <li>• Delete (not recommended)</li> </ul>
Approved	Reviewed and approved by supervisor.	<ul style="list-style-type: none"> <li>• Open (as read-only)</li> <li>• PDF</li> </ul>

\*After opening an assessment as read-only, users can recall the approval request and/or redirect the approval request.

## My Unit (for Supervisors)

The screenshot shows the SDM 'Approval Requests' page. The left sidebar contains navigation options: New Assessment, Hotline Tools, Safety Assessment, SCP Safety Assessment, Risk Assessment, My Caseload, My Alerts, My Assessments, Search, My Unit (highlighted with a red box and labeled 'Click to access Approval Requests'), User Management, Document Library, Change Password, Policies & Procedures, and FAQs. The main content area has tabs for 'Approval Requests' and 'Unit Staff'. Below the tabs is a unit filter dropdown set to 'All My Units' (labeled 'Filter to a unit') and a search bar (labeled 'Search by name'). The table below has columns for Request Date, Case/Referral Name, and other details. A red box highlights the 'Open' icon in the first row of the table, labeled 'Click to access Approval Requests'.

The **My Unit** link is only available for supervisors. Clicking **My Unit** will open a list of all assessments that are awaiting approval, sorted by most recent request date. **Open** (🔗) an assessment to review and make edits as needed. Save the assessment, then click **Approve** at the bottom.

**Note:** Supervisors can select this page as their homepage via the **User Profile** in the User Panel.

### Unit Filter

The default view will display assessments awaiting approval from all units for which the supervisor has approval rights. Select a unit from the drop-down menu to limit the list to assessments only from that unit.

### Worker Search

Enter a client or worker name to find his/her assessments.

### Approval Requests/Unit Staff Toggle

Toggle to the **Unit Staff** screen from the **My Unit** page. The default view shows all workers in all units for which the supervisor has approval rights. Supervisors can also filter to a specific unit, and search for workers by name.

Click the icon to the left of the worker name to view that worker's caseload and To Do List.

The screenshot shows the SDM 'Unit Staff' page. The left sidebar is the same as in the previous screenshot. The main content area has tabs for 'Approval Requests' and 'Unit Staff' (highlighted with a red box and labeled 'Approval/Staff toggle'). Below the tabs is a unit filter dropdown (labeled 'Unit filter') and a search bar (labeled 'Worker search'). The table below has columns for Name and Job Title.

## Referral Assessment List

**New assessment**

**Assessment tiles**

**Information panel**

The **Referral Assessment List** page displays all assessments for a referral. Access this page by clicking the **Referral** (🔍) icon next to a referral name from anywhere in WebSDM.

### New Assessment

Only applicable assessments will be enabled in this panel. Click the **New Assessment** (🔍) icon next to an assessment to start that assessment with referral information pre-populated.

### Assessment Tiles

All assessments for the referral are displayed in the same tile format as the My Caseload page. Each tile displays an assessment, along with relevant information such as assessment status, date, results, and participants.

Click the **Open Assessment** (🔍) icon to view an assessment.

### User Options

- **Expand all tiles** and show details by clicking the **Expand** icon:
- **Collapse all tiles and hide details** by clicking the **Collapse** icon:
- **Display a single tile** and its details by clicking the **Show** icon:
- **Hide a single tile** and its details by clicking the **Hide** icon:
- The **Assessment Action** (⋮) icon displays available assessment actions: Open, PDF, or Delete.

### Information Panel: New!

This new feature displays pertinent referral information from CWS/CMS that will help users complete new assessments for the referral. Basic referral information is included, as well as the following:

- Safety and risk results;
- Worker assignment information; and
- An allegation section with victims' names and ages, allegation(s), and disposition(s). Any person in this list with a case will display a **Case** (🔍) icon. Click this to open his/her Case Assessment List.

## Case Assessment List

The screenshot displays the 'Case Assessment List' for a child case [1234-1234-1234-1234]. The interface includes a sidebar with 'New Assessment' options (Child Strengths & Needs, Safety Assessment), a main list of assessment tiles, and an information panel on the right. Red boxes highlight the 'New assessment' button, the assessment tiles, and the information panel.

**Assessment Tiles:**

- 9/21/2015 Child Strengths & Needs** (Complete): Results: Complete, Status: Complete, Updated: 09/21/2015 by Jane Worker. Participants: No Participants Identified.
- 10/05/2013 Risk Assessment** (Approved): Results: High, Status: Approved 10/08/2013 by Maria Supervisor, Updated: 10/06/2013 by Jane Worker. Referral: 1234-1234-1234, Referral Name: Case, Mother-IR, Received Date: 10/05/2013. Participants: Child Case, Brother Case, Other Case, Other O. Case, Other T. Case, Other Th. Case.
- 10/05/2013 Safety Assessment** (Approved): Results: Unsafe, Status: Approved 10/08/2013 by Maria Supervisor, Updated: 10/06/2013 by Jane Worker. Referral: 1234-1234-1234-1234, Referral Name: Case, Mother-IR, Received Date: 10/05/2013. Participants: Child Case, Brother Case, Other Case, Other O. Case, Other T. Case, Other Th. Case.
- 10/05/2013 Hotline Tools** (Approved): Results: Immediate Response, Status: Approved 10/05/2013 by Maria Supervisor, Updated: 10/05/2013 by Jane Worker. Referral: 1234-1234-1234-1234, Referral Name: Case, Mother-IR, Received Date: 10/05/2013. Participants: No Participants Identified.

**Information Panel:**

Start Date: 10/05/2013  
End Date:  
Case Type: PP

Birth Date: 10/04/2013  
Age: 23 m  
Gender: F  
Language: English  
Last Address: 123 Main St  
Anytown, CA 99999  
Address Type: Case

Initiating Referral: Case, Mother [1234-1234-1234]

Safety: Unsafe [10/05/2013]  
Risk Level: High [10/05/2013]

Family Needs:  
Child Needs:

Assigned To: Jane Worker  
County: Los Angeles

**Related Clients:**

Name	Birth Date	Relationship
Grandma Case	9/17/1963	Grandparent
Mother Case	10/31/1990	Mother
Father Case	11/04/1991	Father
Sister Case	8/23/2009	Sister
Grandpa Case		Grandparent

The **Case Assessment List** page shows all assessments completed for the case by the user. Access this page by clicking the **Case** (□) icon next to a case name from anywhere in WebSDM.

### New Assessment

WebSDM will display all applicable assessments in this panel. Click the **New Assessment** icon (✎) next to an assessment to start an assessment for this case with case information pre-populated.

### Assessment Tiles

All assessments found for the case will be displayed here in the same tile format as the My Caseload list. Each tile displays an assessment, along with relevant information such as assessment status, date, results, assessed clients, and more.

Click the **Open Assessment** (□) icon next to any assessment to view it.

### User Options

- **Expand all tiles** and show details by clicking the **Expand** icon: ⊕
- **Collapse all tiles and hide details** by clicking the **Collapse** icon: ⊖
- **Display a single tile** and its details by clicking the **Show** icon: ▾
- **Hide a single tile** and its details by clicking the **Hide** icon: ▲
- The **Assessment Action** icon (•••) displays available assessment actions: Open, PDF, or Delete.

### Information Panel: New!

This new feature displays pertinent case and referral information from CWS/CMS that will help users complete new assessments for the case. Case demographic information is included, as well as initiating referral information (replaces **Associated Referrals** in old WebSDM), the most recently updated case address, assessment results, and any client with a relationship to the case (as recorded in CWS/CMS; replaces **Sibling Cases** in old WebSDM).

## Case Timeline

The screenshot displays the Case Timeline interface. At the top left, there are tabs for 'Assessments' and 'Timeline'. A 'Timeline toggle' is located below the tabs. A 'Filter Events' dropdown menu is set to 'All Events'. The main area contains a list of events with columns for date, event type, description, and result. A 'Filter' button is positioned above the list. On the right side, there is a sidebar with case details including start and end dates, case type, birth date, age, gender, language, last address, address type, initiating referral, safety, risk level, family needs, child needs, and assigned staff.

Date	Event Type	Description	Result	
9/15/2015	Assessment	Risk Assessment	Incomplete	
9/15/2015	Assessment	Risk Assessment	Incomplete	
9/15/2015	Assessment	Risk Assessment	Incomplete	
9/15/2015	Assessment	Risk Assessment	Incomplete	
9/14/2015	Assessment	Risk Assessment	High	
9/09/2015	Assessment	Safety Assessment	Conditionally Safe	
9/04/2015	Assessment	SCP Safety Assessment	Conditionally Safe	
9/02/2015	Assessment	Safety Assessment	Conditionally Safe	
7/31/2015	Assessment	Family Strengths & Needs		
7/21/2015	Assessment	Risk Assessment	Moderate	
7/17/2015	Assessment	Risk Assessment	Very High	
7/15/2015	Assessment	Risk Assessment	Moderate	
7/15/2015	Assessment	Risk Assessment	Moderate	
7/15/2015	Assessment	Risk Assessment	Moderate	
7/15/2015	Assessment	Risk Assessment	High	
7/14/2015	Assessment	Risk Assessment	Very High	
7/14/2015	Assessment	Family Strengths & Needs	Parenting Skills Mental Health/Coping Skills Substance Abuse	
4/15/2015	Service Component	PP		
2013	11/26/2013	Assessment	Family Strengths & Needs	Parenting Skills Substance Abuse Mental Health/Coping Skills
	11/26/2013	Assessment	Reunification	
	8/19/2013	Assessment	Hotline Tools	Screen Out
	8/19/2013	Referral	1234-1234-1234: Case, Uncle-REL/EO	Evaluate Out
	5/24/2013	Assessment	Hotline Tools	Review Not Required
	5/24/2013	Referral	1234-1234-1234-1: Case, Mother-IR	Evaluate Out
	4/18/2013	Service Component	FR	

**Case Details:**  
 Start Date: 4/04/2013  
 End Date:  
 Case Type: FR  
 Birth Date: 5/05/2009  
 Age: 6  
 Gender: M  
 Language: English  
 Last Address: 123 Main St, Anytown, CA 99999  
 Address Type: Placement Home  
 Initiating Referral: Case, Mother [04/04/13]  
 Safety: Conditionally Safe [9/09/2015]  
 Risk Level: Low [9/15/2015]  
 Family Needs: Family Strengths & Needs [7/31/2015]  
 Child Needs: Family Strengths & Needs [7/14/2015]  
 Assigned To: Jane Worker  
 County: Los Angeles

**Related Clients:**

Name	Birth Date	Relationship
Uncle Case	9/22/1968	Uncle
Mother Case	8/14/1986	Mother
Unknown Case	6/06/1987	Unknown
Sister Case	9/27/2011	Sister
Father Case		Father

The **Case Timeline** view provides a filterable view of major events for the child. **Note:** Assessments and events from other cases that involve this child will also be included on this list.

- Columns include event date, event, event description, and event result.
- While users can click anywhere on the row to open an assessment or referral, we also include the **Open Assessment** (📄) and **Referral** (📄) icons.

### Timeline Toggle

Use this to switch between the timeline and the Case Assessment List.

### Filter

The default view will show all events. Users can filter the timeline to see only certain events:

- Assessments
- Case openings
- New settings
- Referrals
- Removals
- Service component changes

## General Assessment Changes

For the most part, users will complete assessments the same way as they did in the previous version of WebSDM. The content of the assessments themselves is the primary difference. First, here are some overall changes to the assessments:

- Any pink-shaded text field on an assessment is required, and any item with the **Alert** (⚠) icon is required.
- During completion, sections or questions that do not apply based on assessment responses will be disabled (grayed out).
- The **Request Approval** and **PDF** buttons will be enabled *only when the assessment is completed and saved*.
- Assessments now include a status bar at the top. **Orange** indicates that the assessment is incomplete (i.e., not all required items have been recorded), and **green** indicates that the assessment is complete (i.e., all required items have been recorded).
- Assessments become read-only once they are submitted for approval. Users can recall an assessment to edit.
- For all assessments, the **Assessment History** (📄) icon in the User Panel will contain a change history for the assessment, including initial creation, submission, edits, etc.
- If users try to save an assessment before all required items are completed, they will see a pop-up box indicating which items still need to be completed.

## Clients Section on Case Assessments

For case assessments, the Household section in the assessment header has been replaced with the Clients section.

The assessments will still use the same behind-the-scenes logic that identified the household in the old version of WebSDM, but users can now select which household members to include in each assessment. They can also add additional people to the assessment by clicking the **View Related Clients** (👤) icon. Anyone with a relationship to this client (as recorded in CWS/CMS) will be displayed. Users can then select any client on the **Add Client** screen to add that person to the assessment.

Assessed?	Name	Client ID	Birth Date	Age	Has Case	Primary Caregiver	Secondary Caregiver	Child	Other
<input type="checkbox"/>	Other Case	1234-1234-1234-1234	9/22/1968	46		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/>	Mother Case	1234-1234-1234-1234	8/14/1986	29		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Father Case	1234-1234-1234-1234	6/06/1987	28		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/>	Child Case	1234-1234-1234-1234	5/05/2009	6	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Sister Case	1234-1234-1234-1234	9/27/2011	3		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>						<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>						<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Select who is assessed

Click to view related clients

Check a client to add him/her to the assessment

Add?	Name	ID	Birth Date	Age	Has Case	Relationship	Same Home
<input checked="" type="checkbox"/>	Uncle Case	1234-1234-1234-1234	9/22/1968	46		Uncle	
<input checked="" type="checkbox"/>	Mother Case	1234-1234-1234-1123	8/14/1986	29		Mother	
<input checked="" type="checkbox"/>	Unknown Case	1234-1234-1234-1112	6/06/1987	28		Unknown	
<input checked="" type="checkbox"/>	Sister Case	1234-1234-1234-1111	9/27/2011	3		Sister	
<input checked="" type="checkbox"/>	Father Case	1234-1234-1234-2222				Father	
<input checked="" type="checkbox"/>	Father Case	1234-1234-1234-3333				Father	

Close Add Clients

## Assessment-Specific Changes

### Hotline

- The Preliminary Screening section is now at the top of the assessment.
- Although users will no longer see the response trees, the process is still used to guide the assessment. As certain items are selected, non-related items will be disabled, and related items will be enabled.
- The Path portion is now integrated into the assessment (it will still only be visible to path counties).

### Safety Assessment

- No major changes to the assessment completion process.

### SCP Assessment

- No major changes to the assessment completion process.

### Risk Assessment

- The abuse and neglect scores are now scored simultaneously with one set of questions.
- A new support panel is available for referral risk assessments that will display pertinent information from CWS/CMS to guide users as they complete the assessment. Click the **Lightbulb** (💡) icon to access this panel.

### FSNA/CSNA

#### FSNA:

The assessments items are no longer scored:

- Items with “d” responses are automatically listed in the Needs section.
- Any “a” responses are automatically listed in the Strengths section.
- Any “c” responses will also be listed in the Needs section.
- If no “d” responses, users must select at least one “c” item as the priority need.

**SDM** Family Strengths and Needs Sarah Hesse

Status: **Incomplete** Saved

An additional need or strength has been identified that:

Not Applicable .....

a. Actively helps create safety, permanency, and child/youth/young adult well-being. ....

b. Is not a strength or barrier for safety, permanency, or child/youth/young adult well-being. ....

c. Is barrier to safety, permanency, or child/youth/young adult well-being. ....

d. Contributes to imminent danger of serious physical or emotional harm to the child/youth/young adult. ....

Description of behaviors:

**C. Priority Needs and Strengths**

Needs				Strengths		
Response	Domain	Caregiver	Priority?	Response	Domain	Caregiver
c	Domestic Violence	Primary	<input type="checkbox"/>	a	Prior Adverse Experiences/Trauma	Primary
c	Substance Use	Primary	<input checked="" type="checkbox"/>	a	Cognitive/Developmental Abilities	Primary

**User-selected priority**

## CSNA:

- Every client who is noted as a child in the Clients section must be assessed in the CSNA section before the assessment can be submitted.
- The CSNA section displays a list of all children to be assessed.
- Select one child, complete the assessment items for that child, and then repeat for each additional child.
- The green check mark (✓) icon indicates that the child's assessment is complete. The red alert (⚠) icon indicates that the child's assessment is not complete.

SDM Family Strengths and Needs Sarah Hesse

Status: Incomplete Changes Pending...

Substance Use Primary Cognitive/Developmental Abilities Primary

Section 2: Child Strengths & Needs

Child Case ✓

Sister Case ⚠

CSNA: Sister Case

Child Information

Race:  African American/Black  Latino/a  Multiracial  
 Asian/Pacific Islander  White  Other  
 American Indian/Alaska Native

Ethnicity: [Redacted] ⚠

Tribal Affiliation:  Yes  No ⚠

Tribe Name: [Redacted]

Federally Recognized:  Yes  No

Sexual Orientation:  Heterosexual  Lesbian  Other  
 Gay  Bisexual  Not discussed ⚠

Gender Identity/Expression:  Male  Transgender  
 Female  Other ⚠

Religious/Spiritual Affiliation: [Redacted] ⚠

Cultural Identity Important to Child/Youth/Young Adult(e.g., immigration status, disability status):

Save PDF Close Request Approval © 2018 MCHD

## Risk Reassessment

- No major changes to the assessment completion process.

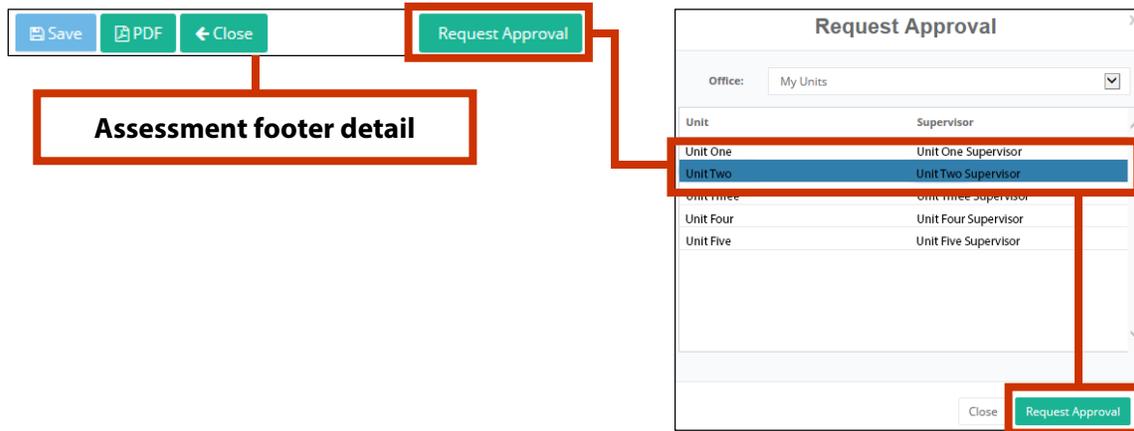
## Reunification

- Users will no longer complete the decision trees. As with the Hotline assessment, the decision tree concept is still used in the design of the assessment items to guide the decision, but users will not see nor complete a decision tree.

## Requesting, Recalling, and Redirecting Approval

### Requesting Approval

1. Once an assessment is completed and saved, the **Request Approval** button will be activated. Click this.
2. This opens the **My Units** screen. Choose a unit from the list or browse for others from the drop-down menu if necessary.
3. After selecting the unit, click **Request Approval**.

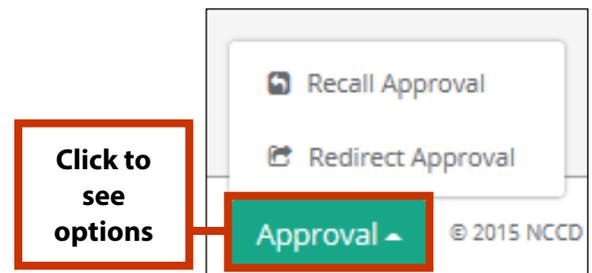


Once the assessment is sent for approval, it becomes read-only. However, users can now recall their assessments if they need to edit them.

### Recalling Approval

Assessments can be recalled from multiple places, but we recommend recalling from within the assessment:

1. Open the assessment.
2. The **Approval** button at the bottom of the assessment will now include an arrow icon. Click this.
3. Choose **Recall Approval**.
4. The **Approving Unit** information from the assessment header will be cleared.
5. Edit if needed and save to enable the **Request Approval** button.
6. Click **Request Approval**, select the unit, and submit.



*Other ways to recall an assessment:*

- From **My Assessments**, click the **Assessment Actions** (\*\*\*) icon and choose **Recall**. Edit and resubmit.
- From **Case/Referral Assessment List**, find the assessment, click the **Assessment Actions** (\*\*\*) icon, and choose **Recall**. Edit and resubmit.

### Redirecting Approval

Once an assessment is submitted for approval, any user can redirect the assessment to a different unit for approval:

1. Open the assessment.
2. Click the **Approval** button at the bottom of the assessment.
3. Choose **Redirect Approval**.
4. Choose the new unit from the **Redirect Approval** screen.
5. Click the **Redirect Approval** button.

## Common Assessment Actions

### Creating New Assessments From the My Caseload Screen:

To start a new referral assessment without any referral information pre-populated:

1. Go to the **New Assessment panel** in the upper left.
2. Click the **New Assessment** (✎) icon next to the assessment name to begin it.
3. Complete the assessment.

To start a new assessment for an existing case or referral with case/referral information pre-populated:

1. Find the case or referral either by scrolling or searching.
2. Click the **Case** (📁) or **Referral** (👤) icon to open the Case Assessment List or the Referral Assessment List.
3. Only available assessments will display in the New Assessment panel (e.g., a case with a completed safety assessment wouldn't display a link for a hotline tool).
4. Click the **New Assessment** (✎) icon next to the assessment name to begin it.
5. Complete the assessment.

### Other places to start a new assessment:

Blank referral assessments (no referral information pre-populated):

- My Alerts
- My Assessments
- Search page

Assessments for an existing case/referral:

- Case Assessment List
- Referral Assessment List
- Case Timeline
- To Do List

## Saving and Continuing Incomplete Assessments

1. While in an assessment, click the **Save** button at the bottom of the screen.
2. The assessment will display a status of "Incomplete" on the following screens:
  - My Caseload
  - My Alerts (only assessments left incomplete for more than five days)
  - My Assessments
  - Case/Referral Assessment List
3. Click the **Open Assessment** (📁) icon next to the assessment from any of these screens to complete.

**Note:** Assessments that were incomplete as of November 1 will be available in the new version to complete.

## Editing Assessments

Once an assessment has been submitted, it becomes read-only. However, users can recall an assessment to edit *if the assessment has not been approved*.

1. Open the assessment.
2. The **Approval** button at the bottom of the assessment will now have an arrow icon. Click this.
3. Choose **Recall**.
4. Edit as needed and save to enable the **Request Approval** button.
5. Click **Request Approval**, select the unit, and submit.

### *Editing steps by assessment status:*

If incomplete: Open, edit, save, and submit.

If complete but not submitted: Open, edit, save, and submit.

If submitted but not approved: Recall the assessment, edit, save, and resubmit.

If approved: Cannot be edited.

### **Finding Overdue Assessments**

**My Caseload** is the best place to find overdue assessments. Additionally, any case or referral with any overdue assessments will display the **Overdue Assessment** (  ) icon. The number within the icon indicates the number of overdue assessments.

### *Other places to find overdue assessments:*

- My Alerts
- To Do List (toggled to display overdue assessments)
- Case/Referral Assessment List

### **Finding Incomplete Assessments**

**My Caseload** is the best place to find incomplete assessments. Any case or referral with any incomplete assessments will display the **Incomplete Assessment** (  ) icon. The number within the icon indicates the number of incomplete assessments.

### *Other places to find incomplete assessments:*

- My Alerts
- My Assessments
- Case/Referral Assessment List

### **Finding Submitted, Unapproved Assessments**

1. Open the My Assessments screen.
2. Sort the **Status** column; OR
3. Filter to **Approval Submitted**.

### **Deleting Assessments**

Assessments that are incomplete or have not been submitted for approval can be deleted on the **Case/Referral Assessment List** or **My Assessments** pages.

1. Find the assessment.
2. Click the **Assessment Action** (  ) icon.
3. Choose **Delete**.

### **PDFing Assessments**

Assessments can be PDFed once they are completed, saved (no changes pending), and no longer require edits.

1. Click the **PDF** button at the bottom of an assessment; OR
2. From the Case/Referral Assessment List or My Assessments screens, click the **Assessment Actions** (  ) icon and choose **PDF**.

## Quick Reference: Icon Legend

Icon	Name	Location	Purpose
	New Assessment	Throughout WebSDM	Start a new assessment.
	Case	Throughout WebSDM	Open the case assessment list.
	Referral	Throughout WebSDM	Open the referral assessment list.
	Open Assessment	Throughout WebSDM	Open an existing assessment.
	Overdue Assessment	My Caseload	Indicates the number of overdue assessments for the case/referral.
	Incomplete Assessment	My Caseload	Indicates the number of incomplete assessments for the case/referral.
	Required Item	Assessments	Indicates that the item must be completed before submitting.
	Assessment Definition	Assessments	Click to view the assessment item's definition.
	View Related Clients	Clients section on various assessments	Click to view a list of all related clients (in CWS/CMS) and add to assessment.
	Expand/Collapse All Tiles	Case/Referral Assessment List	Click the Expand icon to show details for all tiles. Click the Collapse icon to hide details for all tiles.
	Show/Hide Single Tile	Case/Referral Assessment List	Click the Up arrow to collapse details for the selected tile. Click Down to show.
	Expand details	Case/Referral Assessment List (list view)	While on the list view of the assessment lists, click this to see assessment details.
	Assessment Actions	Throughout WebSDM	Click to see available actions for the assessment: Open, PDF, or Delete. (Will vary based on assessment status.)
	Contact Help Desk	User Panel	Click to email to the WebSDM help desk.
	Site Tour	User Panel	Click to take a guided tour of WebSDM.
	FAQs	User Panel	Click for a list of frequently asked questions.
	Profile	User Panel	Click to select your home page.
	Log Out	User Panel	Click to end your WebSDM session
	Assessment History	User Panel (while viewing an assessment)	Click to view the assessment history: creation date, edits, submissions, etc.
	Assessment Support Panel	User Panel in any referral risk assessment	Click to open a panel with pertinent information from CWS/CMS that will help complete the assessment

## Quick Reference: How Do I...

Action	Screen	Steps
Start a new blank assessment for a referral	<ul style="list-style-type: none"> <li>My Caseload</li> <li>My Assessments</li> <li>My Alerts</li> <li>Search</li> </ul>	Choose the assessment from the New Assessment panel.
Start a new assessment for an existing case	<ul style="list-style-type: none"> <li>Case Assessment List</li> <li>Case Assessment Timeline</li> <li>To Do List</li> </ul>	Choose the assessment from the New Assessment panel. Case info will be pre-populated.
Start a new assessment for an existing referral	<ul style="list-style-type: none"> <li>Referral Assessment List</li> <li>To Do List</li> </ul>	Choose the assessment from the New Assessment panel. Referral info will be pre-populated.
Request approval for a completed assessment	All assessments	<ol style="list-style-type: none"> <li>Complete all required items and save the assessment.</li> <li>Click the <b>Request Approval</b> button.</li> <li>Choose the approval unit.</li> <li>Click <b>Request Approval</b>.</li> </ol>
Recall an assessment after submitting for approval.  <i>Only the user who submitted the assessment for approval can recall it.</i>	<ul style="list-style-type: none"> <li>Within an assessment (recommended)</li> <li>My Assessments</li> <li>Case/Referral Assessment List</li> </ul>	<p><u>W/in assessment:</u></p> <ol style="list-style-type: none"> <li>Open the assessment.</li> <li>Click the <b>Approval</b> button.</li> <li>Choose <b>Recall Approval</b>.</li> <li>Edit, save, and resubmit.</li> </ol> <p><u>From other screens:</u></p> <ol style="list-style-type: none"> <li>Click the <b>Assessment Action</b> icon.</li> <li>Choose <b>Recall</b>.</li> <li>Edit, save, and resubmit.</li> </ol>
Redirect an assessment after submitting for approval	Within any assessment that has been submitted but not yet approved. (Must first open the assessment from the My Assessments or Case/Referral Assessment list.)	<ol style="list-style-type: none"> <li>Open the assessment.</li> <li>Click the <b>Approval</b> button.</li> <li>Select <b>Redirect Approval</b>.</li> <li>Choose the new unit.</li> <li>Click <b>Redirect Approval</b>.</li> </ol>
Save an incomplete assessment; continue an incomplete assessment	All assessments	<ol style="list-style-type: none"> <li>Click <b>Save</b>.</li> <li>The assessment will be displayed with a status of "Incomplete" on the following screens: <ul style="list-style-type: none"> <li>My Caseload (recommended)</li> <li>My Caseload list view</li> <li>My Alerts (only assessments left incomplete for more than five days)</li> <li>My Assessments</li> <li>Case/Referral Assessment List</li> </ul> </li> <li>Open the assessment from any of these screens and continue.</li> </ol>
Edit an assessment	Within any assessment that has not been approved.	<p>If <u>incomplete</u>: Open, edit, and save.</p> <p>If <u>complete but not submitted</u>: Open, edit, and save.</p> <p>If <u>submitted but not approved</u>: Recall the assessment, edit, save, and resubmit.</p> <p>If <u>approved</u>: Cannot be edited.</p>

\*Can be selected as default home page from the user's profile on the **User Panel**.

\*\*Some counties do not require approval for hotline tools.

Action	Screen	Steps
Find overdue assessments	<ul style="list-style-type: none"> <li>My Caseload (recommended)</li> <li>My Caseload list view</li> <li>My Alerts</li> <li>To Do List</li> <li>Case/Referral Assessment List</li> </ul>	<p><u>My Caseload</u>: Cases with overdue assessments will display the red Overdue icon.</p> <p><u>My Caseload list view</u>: Noted in Overdue column.</p> <p><u>My Alerts</u>: Noted in Overdue Assessments panel and in the alert summary.</p> <p><u>To Do List</u>: Click <b>Show Past Due</b>.</p> <p><u>Case/Referral Assessment List</u>: Noted above the Information Panel.</p>
Find incomplete assessments	<ul style="list-style-type: none"> <li>My Caseload (recommended)</li> <li>My Caseload list view</li> <li>My Alerts</li> <li>My Assessments</li> <li>Case/Referral Assessment List</li> </ul>	<p><u>My Caseload</u>: Cases with incomplete assessments will display the orange Incomplete icon.</p> <p><u>My Caseload list view</u>: Noted in Incomplete column.</p> <p><u>My Alerts</u>: Assessments incomplete for more than 5 days will be listed in the Incomplete Assessments panel and in the alert summary.</p> <p><u>My Assessments</u>: Status column will indicate if the assessment is incomplete. Use the Select Status drop-down menu to see only incomplete assessments.</p> <p><u>Case/Referral Assessment List</u>: Will show Incomplete as the status.</p>
Find assessments that have been submitted but not yet approved	My Assessments	The Status column will indicate Submitted. Sort by Status to group submitted assessments, or select Approval Submitted from the Select Status drop-down menu.
PDF an assessment  <i>Assessments should only be PDFed once they are completed, saved, and do not require any more edits.</i>	<ul style="list-style-type: none"> <li>Within an assessment</li> <li>Case/Referral Assessment List</li> <li>My Assessments</li> <li>Search results</li> </ul>	<p><u>W/in assessment</u>:</p> <ol style="list-style-type: none"> <li>Open the assessment.</li> <li>Click the <b>PDF</b> button.</li> </ol> <p><u>From other screens</u>:</p> <ol style="list-style-type: none"> <li>Find the assessment.</li> <li>Click the <b>Assessment Action</b> icon.</li> <li>Choose <b>PDF</b>.</li> </ol>
Delete an assessment  <i>Only available for incomplete or unsubmitted assessments.</i>	<ul style="list-style-type: none"> <li>Case Assessment List (recommended)</li> <li>Referral Assessment List (recommended)</li> <li>My Assessments</li> </ul>	<ol style="list-style-type: none"> <li>Find the assessment.</li> <li>Click the <b>Assessment Action</b> icon.</li> <li>Choose <b>Delete</b>.</li> </ol>

## Quick Reference: Primary Uses of WebSDM Screens

Screen	Actions
<b>My Caseload*</b> <i>Accessed from Links panel</i>	<ul style="list-style-type: none"> <li>View cases/referrals currently on user's caseload</li> <li>View case- and referral-specific information (e.g., risk/safety level, demographics, etc.)</li> <li>Open a case/referral assessment list</li> <li>See number of overdue/incomplete assessments</li> <li>View originating risk/safety assessments</li> </ul>
<b>Case Assessment List</b> <i>Accessed by opening a case</i>	<ul style="list-style-type: none"> <li>See all assessments created for the case by the user</li> <li>Start a new assessment for the case with case info pre-populated</li> <li>Scan assessment details: household, results, status</li> <li>Scan assessment participants</li> <li>Easily determine approval status</li> <li>Open, PDF, or delete assessments (depending on status and user rights)</li> <li>View case information on the Case Information Panel</li> <li>Toggle to the Case Assessment Timeline</li> </ul>
<b>Case Assessment Timeline</b> <i>Accessed by toggling Case Assessment List</i>	<ul style="list-style-type: none"> <li>See child-based case events in a list, grouped by year</li> <li>Scan events and results</li> <li>Filter to see a specific event group (i.e., all referrals for the case)</li> <li>View case information on the case information panel</li> <li>Start a new assessment for the case with case info pre-populated</li> </ul>
<b>Referral Assessment List</b> <i>Accessed by opening a referral</i>	<ul style="list-style-type: none"> <li>See all assessments created for the referral by the user</li> <li>Start a new assessment for the referral with referral info pre-populated</li> <li>Scan assessment details: results, status, participants</li> <li>Scan assessment participants</li> <li>Easily determine approval status</li> <li>Open, PDF, or delete assessments (depending on status and user rights)</li> <li>View referral information on the Referral Information Panel</li> </ul>
<b>My Assessments*</b> <i>Accessed from Links panel</i>	<ul style="list-style-type: none"> <li>See a list of all assessments created by the user</li> <li>Search the list by name, status, or date range</li> <li>View completed assessments</li> <li>Open, PDF, or recall assessments (depending on status and user rights)</li> <li>Sort to see assessments that have been submitted but not yet approved</li> </ul>
<b>My Alerts*</b> <i>Accessed from Links panel</i>	<ul style="list-style-type: none"> <li>See assessments that require action (overdue, upcoming, pending submission)</li> <li>Start new assessment for a case</li> <li>Opt to receive summary of My Alerts via daily email</li> </ul>
<b>To Do List</b> <i>Accessed on My Caseload page</i>	<ul style="list-style-type: none"> <li>See overdue/upcoming assessments</li> <li>View by name or due date</li> <li>Start new assessment</li> </ul>
<b>Case Information Panel</b> <i>Accessed by opening a case</i>	<ul style="list-style-type: none"> <li>See case basics (start/end dates, service component)</li> <li>See case demographics (age, gender, last updated address from CWS/CMS)</li> <li>See initiating referral (**replaces Associated Referrals**)</li> <li>Access referral assessment list by clicking the Referral icon</li> <li>See assessments, results, and priority strengths and needs</li> <li>See assigned worker and county</li> <li>See related clients' names, birthdays, and relationship (**replaces Sibling Cases**)</li> </ul>
<b>Referral Information Panel</b> <i>Accessed by opening a referral</i>	<ul style="list-style-type: none"> <li>See referral basics (start/end dates, priority)</li> <li>See the referral address (if available; as entered in CWS/CMS)</li> <li>See risk and safety results</li> <li>View risk and safety assessments</li> <li>See assigned worker and county</li> <li>View allegations: victim, victim age, allegation, and disposition</li> <li>Access case information for allegation victim(s) by clicking the Case icon</li> </ul>