

## WebSDM Supervisor Guide

This document covers the supervisor-specific components of WebSDM. The first section is an illustrated guide that covers both sides of approving assessments: what to click and how to review. The second section is a trainer module that covers My Alerts for Supervisors, My Unit, and approving assessments.

### Approving Assessments

1. Check **My Unit** for any pending approval requests. Click to open the **Approval Requests** list.

The screenshot shows the 'Approval Requests' page in WebSDM. The left sidebar contains a menu with 'My Unit' highlighted in red. The main content area displays a table of approval requests for 'Unit 1 in Office 1'.

Request Date	Requested By	Case/Referral Name	Assessment	Unit
12/15/2015	Hesse, Sarah	Harding, Ann	SA	Unit 1 in Office 1
12/15/2015	Hesse, Sarah	Baxter, Joshua	SA	Unit 1 in Office 1
12/07/2015	Instructor 1, SDM	Harding, Adam	CS	Unit 1 in Office 1

2. Click the **Open Assessment** icon to view the assessment.

Request Date	Requested By	Case/Referral Name	Assessment	Unit
12/15/2015	Hesse, Sarah	Harding, Ann	SA	Unit 1 in Office 1
12/15/2015	Hesse, Sarah	Baxter, Joshua	SA	Unit 1 in Office 1
12/07/2015	Instructor 1, SDM	Harding, Adam	CS	Unit 1 in Office 1

3. Review the assessment.

**SDM** Child Strengths and Needs Training

Status: Complete Saved

Case ID:	0000-8718-1040-4000062	Assessment Date:	12/07/2015	
Case Name:	Harding, Adam	County of Completion:	Administration	
Approval Status:	Submitted by Instructor 1, SDM (12/07/2015)		Approval Unit:	Unit 1 in Office 1
Created by:	Instructor 1, SDM (12/07/2015)		Last Update by:	Instructor 1, SDM (12/07/2015)

**Child Information**

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

Ethnicity:

Tribal Affiliation:  Yes  No  Parent not available  Parent unsure

Tribe Name:

Federally Recognized:  Yes  No

Sexual Orientation:  Heterosexual  Lesbian  
 Gay  Bisexual  
 Other  
 Not discussed

[Approve](#) [PDF](#) [Close](#) [Redirect Approval](#) © 2015 NCCD

4. If the worker sent the assessment to in error, click [Redirect Approval](#) at the bottom of the assessment to forward it to the correct supervisor.

5. Guidelines for depth of review prior to approval:

**Always check:**


- Review overrides or use of "other."
- Compare with your knowledge of family for overall consistency. For example:
  - » You know the child was placed in foster care, but the safety assessment shows "Safe."
  - » You know the mother has serious mental health issues, but the FSNA priority needs do not include mental health/coping skills and you find that the mental health/coping skills item is scored "b."
- Look for obvious internal and cross-assessment consistency. For example:
  - » Unexplained inconsistency between the safety assessment that indicates substance abuse problem and the risk assessment that indicates no problem (this is possibly correct but warrants questioning).

- Look for consistency with bottom-line recommendations in assessment and court reports and/or case actions. For example:
  - » Court report recommends continued reunification, but the reunification assessment recommends terminate reunification.
  - » Case was opened but the risk level was moderate.

**Spot check:**

*Workers with less experience using the assessment should have more frequent spot checks.*

- Compare one or two random item scores with narrative.
- Compare prior history items with CWS/CMS record or SafeMeasures history page.

6. If you are satisfied that the assessment meets standards, click .


7. If you find obvious errors or are uncertain if there are errors:

**Best Choice:** Discuss the assessment with the worker. Make the revisions together. Document the changes in the **Supervisor Comments** box:


Comments
Staff Person Comments:
Supervisor Comments:

Example: “Met with worker on 01/08/15 and reviewed risk item 6. Corrected response to a. based on actual number of children in household.”

Click . The assessment will now become read-only and can no longer be edited.

Note: If the worker is not available immediately, you can select , and the unmodified and unapproved assessment will remain on your approval list. When the worker is available, you can open it again and proceed as above.

**Next Choice:** Make the revision yourself. Enter your comments into the supervisor comment box. For example, “Worker scored item 6 as b., that there were four or more children. On review, supervisor determined that there were only three children in the household and modified item.”

Select . The assessment will now have a status of Approved With Modifications. The worker will also see the assessment on his/her My Alerts screen in the Assessment Recently Approved w/Modifications section. Advise the worker to open the assessment to see your comments.

8. Most importantly, use revision as an opportunity to coach/mentor. For example:

- Help the worker learn which household to assess and who is part of the household.
- Help the worker become more familiar with definitions.

- Help the worker learn how extensively to pursue missing or conflicting information.
- Coach the worker on ways to elicit information about uncomfortable topics.
- Increase the worker's understanding of complicated topics such as substance abuse, mental health, domestic violence, and developmental disability.
- Increase the worker's knowledge of medical issues, such as osteogenesis imperfecta, diabetes management, and the meaning of various sexually transmitted diseases and their relative value as sexual abuse indicators.
- Increase worker creativity in developing safety plans and case plans.
- Increase worker knowledge of community resources.
- Challenge the worker to deepen critical-thinking skills.
- Help the worker learn correct policies and procedures rather than workarounds.



## Supervisor Module: My Alerts for Supervisors, My Unit, and Approving Assessments

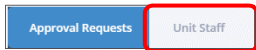
Training Site Information	
<b>URL:</b>	<a href="https://ca-training.sdmdata.org/">https://ca-training.sdmdata.org/</a>
<b>Instructor Login:</b>	instructor101, instructor 102
<b>Student Login:</b>	supervisor1 – supervisor 35
<b>Password:</b>	training

Objectives
<ul style="list-style-type: none"><li>• Participants will understand the supervisor-specific elements of My Alerts.</li><li>• Participants will understand what actions are available from My Unit: approving requests and viewing their workers' caseloads and assessment lists.</li><li>• Participants will learn how to approve assessments.</li><li>• Participants will understand that once they approve an assessment, it cannot be recalled, edited, or redirected.</li><li>• Participants will know that they can choose My Unit as their home page.</li></ul>

Key Points
<ul style="list-style-type: none"><li>• My Alerts for Supervisors contains an additional section for assessments that were submitted for approval in the last two days.</li><li>• My Unit provides a list of assessments awaiting approval.</li><li>• My Unit allows supervisors to view the caseloads of workers in their unit.</li><li>• Once assessments are approved, they can no longer be recalled, edited, or redirected.</li><li>• Supervisors can choose My Unit as their home page.</li></ul>

Trainer Notes
<ul style="list-style-type: none"><li>• This section allows you to demonstrate the supervisor-specific features of WebSDM. If you're teaching a class with both workers and supervisors, you will pull aside supervisors to cover this information during Module 9 while workers practice completing assessments.</li><li>• Advise supervisors that the Supervisor Guide in the Document Library provides step-by-step instructions on the actions you'll cover, as well as additional resources from SDM program staff on approving assessments.</li><li>• The training site does not currently contain the check box that allows supervisors to limit their approval list to only their supervised unit(s).</li><li>• Before starting, you will log into WebSDM under one of the supervisor instructor accounts (either instructor101 or instructor102). Your password is still "training."</li></ul>

Icon Legend		
Icon	Description	Meaning
	Approve	Click to approve an assessment.
	Caseload	Click to access a worker's My Caseload screen.

Script	Action
I'm going to demonstrate the supervisor-specific features of WebSDM, starting with My Alerts. In addition to the sections that all users have, supervisors have one additional section that lists approval requests submitted to you in the last two days.	Open <b>My Alerts</b> .  Highlight.
If you have approval rights in multiple units, this list can get quite long. If you generally only approve assessments for your supervised units, you can click a check box to limit this list to just your supervised units. That check box isn't available on this training site, but you will see it in the upper right once you log into your county's WebSDM.	
Like the worker version, you can opt to receive an aggregate version of this screen in a daily summary email. You would check the box to opt in or uncheck to opt out.	Highlight.
Next, before I cover My Units, take a look at the Links Panel. Notice the additional "My" link under the others we covered earlier. This is the My Units link, which is only available for supervisors. The indicator next to the link lets you know how many assessments are awaiting approval.	Highlight the <b>My Unit</b> link and the <b>indicator</b> .
Let's take a look. Clicking the link opens your Approval Requests list, which will list all assessments in your units that are awaiting approval. The columns display the request date, the worker, the case/referral name, the assessment, and the worker's unit.  Similar to My Assessments, you have a few options for working with the information on this page. <ul style="list-style-type: none"> <li>You can sort this list by any column.</li> <li>You can select a unit from the drop-down box to filter the list to only assessments submitted by that unit.</li> <li>You can search for a worker or a case/referral name. Note that this is an alpha-only search—you cannot search for a date or ID.</li> </ul>	Highlight <b>page title</b> .  Highlight each.  <b>Sort</b> by any column. <b>Filter</b> by <b>Unit 1 in Office 1</b> . Highlight <b>search field</b> but do not demo.
Notice the toggle at the top of the screen. This page defaults to your approval requests, but you can toggle to Unit Staff to see a list of workers. All workers in your unit are displayed, along with their titles. You can sort either column, and you can also search by name.	Highlight then click <b>Unit Staff</b> .  Highlight <b>search box</b> .

Script	Action
<p>The feature you'll probably find most useful on this screen is the Caseload (👤) icon next to each worker's name. Click this to open any worker's My Caseload screen, which lets you review their caseload and To Do List. To return to the Unit Staff list, click your Internet browser's back button.</p>	<p>Click the <b>Caseload icon</b> for SDM Participant 1.</p> <p>Click the back button.</p>
<p>One last thing about My Unit—in addition to My Caseload, My Alerts, and My Assessments, as a supervisor, you can also choose My Unit as your home page. I'll show you.</p>	<p>Open <b>User Profile</b> to show <b>My Units</b> on the list. Do not select. Close.</p>
<p>Next I'll demonstrate how to approve an assessment. We won't cover the critical thinking involved in reviewing or determining if edits are necessary. That information is available in the Supervisor Guide, available in the Document Library. Instead, I'll walk you through the mechanics.</p>	
<p>First, click the Open Assessment icon to view the assessment. Because WebSDM knows I'm a supervisor, instead of the Save button, I have an Approve button. Before we go any further, let me emphasize that you must make and document your edits BEFORE you approve the assessment. Whereas workers can recall their assessments to edit before they're approved, once you click that Approve button, the assessment becomes officially read-only and cannot be edited.</p>	<p><b>Open</b> an assessment.</p> <p>Highlight the <b>Approve</b> button.</p>
<p>Before you begin your review, if you realize that the assessment was sent to your unit in error, you can redirect the approval request.</p> <p><b>Q:</b> Who can tell me how to redirect an approval request?  <b>A:</b> Click the Redirect Approval button, choose the new unit, and click Redirect Approval.</p>	<p>Click through the steps, but click <b>Close</b> instead of <b>Redirect Approval</b>.</p>
<p>If it was not, you will review the assessment and make any necessary edits. If you change anything, document your edits in the Supervisor Comments field at the bottom. We'll assume no changes were necessary, so I'll click the Approve button.</p>	<p>Highlight <b>Comments</b> field.</p> <p>Click <b>Approve</b>.</p>
<p>The assessment refreshes, and now we see the approval information in the assessment header. At this point, the assessment is officially read-only.</p>	<p>Highlight <b>Approval Status</b> in the header.</p>
<p>Notice the two buttons at the bottom: Close and PDF. If your county requires you to upload completed assessments to CWS/CMS, this is the best time to do so, because the assessment is now approved. Because that's beyond the scope of our training, I'll close the assessment.</p>	<p>Highlight.</p> <p>Click <b>Close</b>.</p>
<p>I've been redirected to my Approval Requests screen, and the assessment I just approved is now gone from the list.</p> <p><b>Q:</b> Can anyone tell me where in WebSDM the worker who submitted this assessment would see it now?</p>	

Script	Action
<p><b>A:</b></p> <ul style="list-style-type: none"><li>• <u>My Assessments</u>, with an Approved status;</li><li>• <u>My Alerts</u>, in the Assessments Recently Approved section; or</li><li>• <u>RAL</u> or <u>CAL</u> (also with an Approved status).</li></ul>	