Inform Systems. Transform Lives.

WEBSDM USER GUIDE

CALIFORNIA DEPARTMENT OF SOCIAL SERVICES

October 2021

ABOUT EVIDENT CHANGE

Evident Change promotes just and equitable social systems for individuals, families, and communities through research, public policy, and practice. For more information, call (800) 306-6223 or visit us online at EvidentChange.org and @Evident_Change on Twitter.

CONTENTS

USER RESOURCES

WEBSDM HELP RESOURCES

- Email the help desk: support@evidentchange.org, or click in the **User Panel** (see page 2).
- Page tour: Click in the **User Panel** to launch an automated tour of the page.
- Quick reference guides: **Document Library** in the **Links Panel**.
- Tutorials: Accessed via the **Links Panel**.
- Assessment item definitions: Available on all assessments.
- FAQs: Accessed from the **Links Panel**.

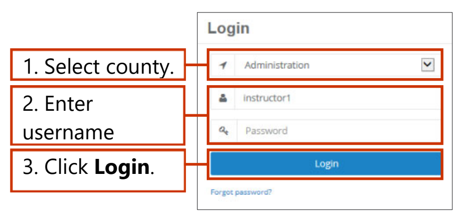
URLS

URL: https://ca.sdmdata.org
Training site URL: https://ca-training.sdmdata.org
WebSDM Definitions site URL: https://ca.sdmdata.org/definitions

Note: The WebSDM Definitions site is available offline (i.e., you do not have to be logged into WebSDM to access).

LOGGING IN

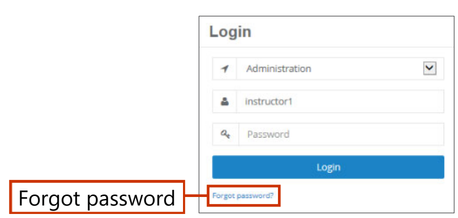
Go to https://ca.sdmdata.org.



1. Select your county from the drop-down menu.
2. Enter your username and password.
3. Click **LOGIN**.

PASSWORD RESETS

If you forget your password:



1. Select your county from the drop-down menu.
2. Click the **Forgot password?** link to receive an automated password reset email.

If you do not know your username, see your supervisor or email the help desk (support@evidentchange.org).

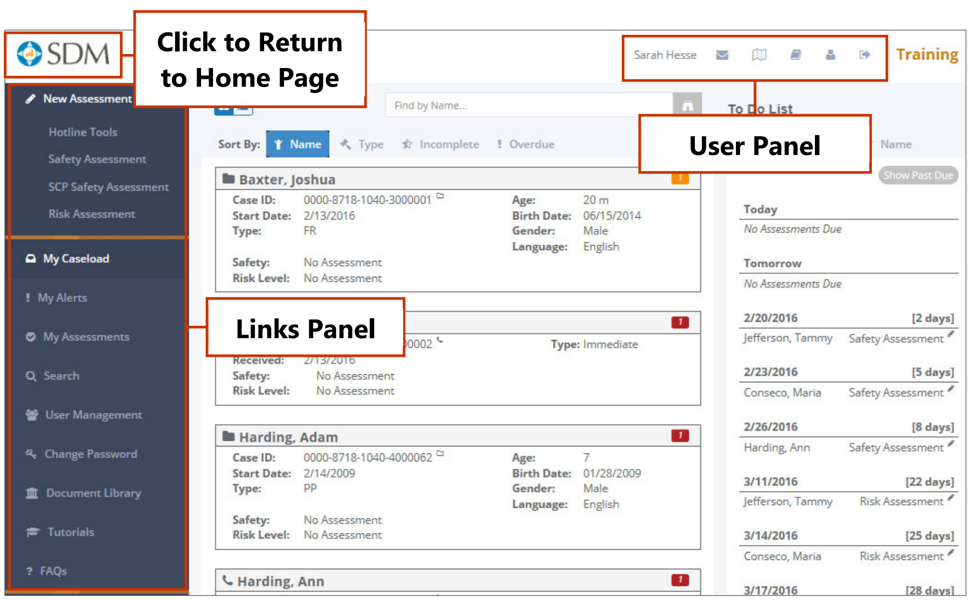
DATA EXTRACT

WebSDM utilizes data from CWS/CMS to display caseload, case, and referral information. The data extract is refreshed every night. Anything entered **before** 7:00 p.m. is available in WebSDM the next day. Anything entered into CWS/CMS **after** 7:00 p.m. is available in WebSDM two days later.

Example:

- Data entered into CWS/CMS on Monday at noon > available in WebSDM on Tuesday.
- Data entered into CWS/CMS on Monday at 10:00 p.m. > available in WebSDM on Wednesday.

HOME PAGE



The home page is the first screen shown after logging in.

Choose one of three pages as your home page: **My Caseload**, **My Alerts**, or **My Assessments**. Supervisors can also choose **My Unit**.

To return to the home page, click the **SDM logo** in the upper left.

USER PANEL

This panel contains links to:

- Email the WebSDM help desk: ✉
- Launch a page tour: 🕮
- Access the P&P Manual: 📘

- Access your user profile:
- Log out:

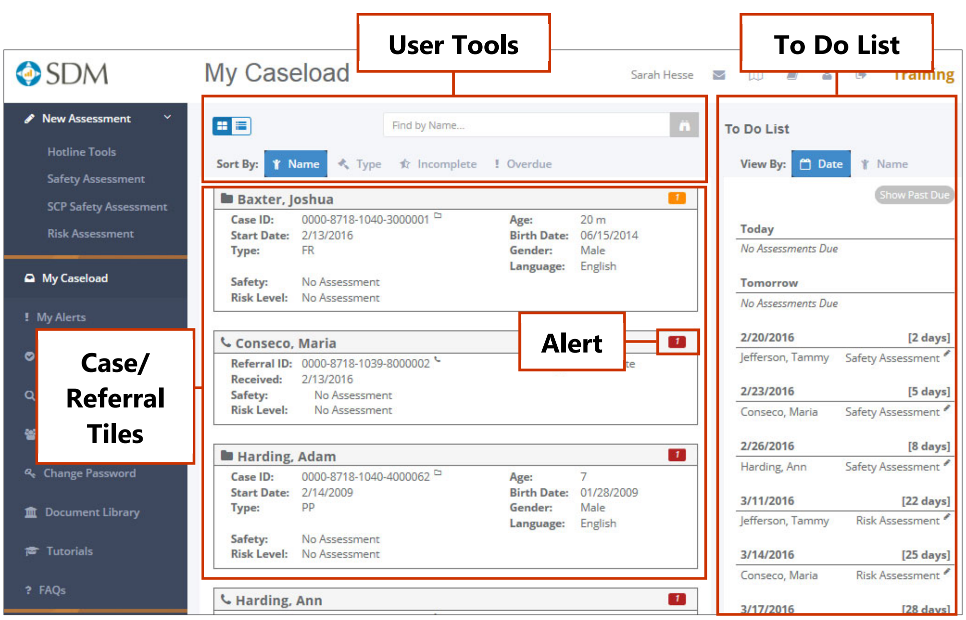
Note: Click the **User Profile** icon to change your home page. Choose from **My Caseload**, **My Alerts**, or **My Assessments** (supervisors can also choose **My Units**).

LINKS PANEL

The **New Assessment** section contains links for new, blank referral assessments (no referral information pre-populated). Below that is a series of resource links.

- **My Caseload:** Shows your current caseload in a series of tiles. This is the default home page. See below for more information.
- **My Alerts:** Shows lists of assessments that may require action. See page 5 for more information.
- **My Assessments:** Full list of all assessments that you have completed/edited. See page 6 for more information.
- **Search:** Search for any case, referral, or assessment in the county by ID or name.
- **User Management:** For administrators only.
- **Change Password:** Used to manually update your password.
- **Document Library:** Contains links to user resources, the P&P Manual, and other training materials.
- **Tutorials:** Contains animated demonstrations of common assessment actions.
- **FAQs:** Contains frequently asked questions.

MY CASELOAD



My Caseload shows all cases and referrals currently assigned to your caseload.

This is the default home page. Open your **User Profile** to change.

USER TOOLS

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

CASE/REFERRAL TILES

Each tile contains basic information: name, ID, start date, risk and safety results, and more. 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 within the icon indicates how many assessments are incomplete or overdue.

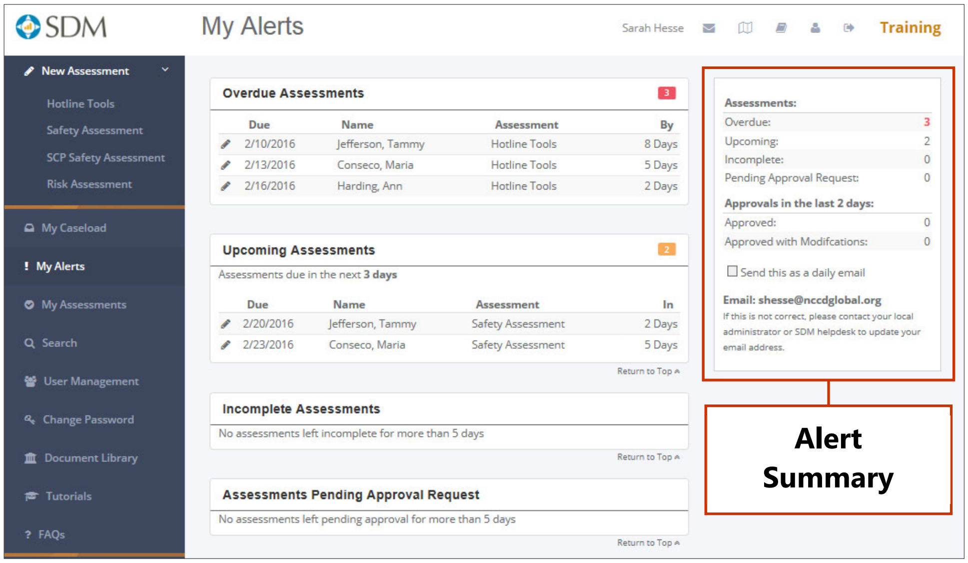
- **Incomplete (orange):** 3
- **Overdue (red):** 2

TO DO LIST

The **To Do List** provides an overview of upcoming assessments.

- The default view hides past-due assessments. Click **Show Past Due** to see them: Show Past Due
- The default view also sorts upcoming assessments by due date. Click the **Date/Name** toggle to sort assessments by case/referral: View By: Date Name
- **Note:** This view automatically displays overdue assessments.
- Each assessment due for the case/referral is listed, along with its due date.
- Click the **New Assessment** icon to start a new assessment. (Icon:)

MY ALERTS



My Alerts displays a summary of assessments that may require action.

Start a new assessment or open an incomplete assessment directly from a list.

New Assessment icon:

Open icon:

STATUSES

Assessments are grouped by the following statuses:

- **Overdue**, per Structured Decision Making® (SDM) policy.
- **Upcoming** in the next three business days.
- **Incomplete** for more than five days.
- **Pending approval request** for five days (i.e., the assessment is complete but hasn't been submitted for approval).
- **Recently approved** within the last two days (not shown above).
- **Recently approved with modifications** within the last two days (not shown above).

ALERT SUMMARY

The upper right panel provides a summary view of the page, which you can opt to receive as a daily email. Check the box to opt in; uncheck to opt out. **Note:** If no assessments meet the criteria for any section of My Alerts, you will not receive an email.

MY ALERTS FOR SUPERVISORS

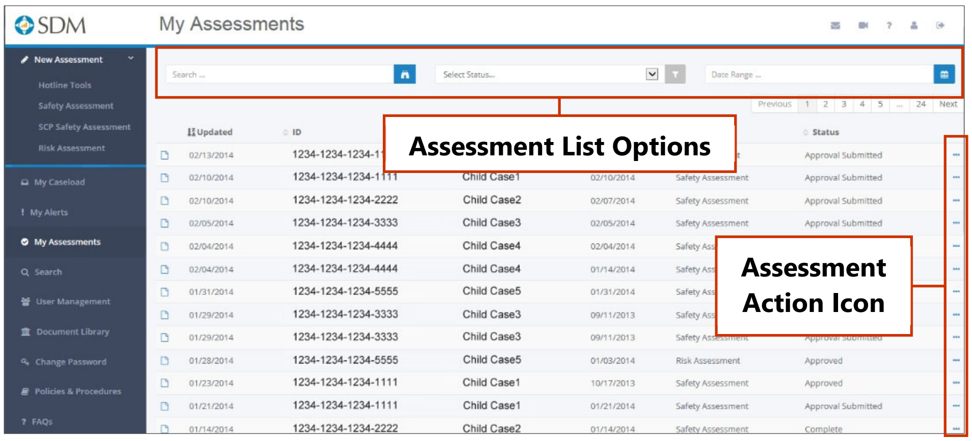
The supervisor version of **My Alerts** includes two additional, supervisor-specific sections.

- **Recent approval requests** (received in the last two days).

- **Overdue approvals** (approval requested more than five days ago).

Supervisors can open an assessment from this list to edit as needed and approve. Supervisors can also opt to receive a daily alert summary by email.

MY ASSESSMENTS



My Assessments displays all assessments you have completed or edited.

Assessments are listed in chronological order by most recent update date.

COLUMNS

- Columns include updated date, ID, name, creation date, assessment type, and status.
- Click any column heading to sort in ascending or descending order.
- Click the **Open Assessment** icon next to any assessment to view it. (Icon: 🗋)

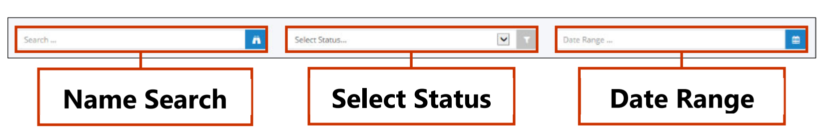
ASSESSMENT ACTION ICON

Click the **Assessment Action** icon to see available actions for the assessment. See the Assessment Actions table on page 6 for more information about what actions are available for an assessment, based on its status. (Icon: •••)

ASSESSMENT LIST OPTIONS

NAME SEARCH

Search for a case/referral name or keyword (alpha only; cannot search for a date or ID).

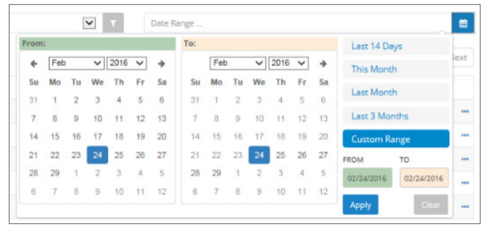


SELECT STATUS

Filter the list to isolate assessments with a specific status by choosing a status from the **Select Status** drop-down menu.

DATE RANGE

Filter the list to isolate assessments completed during a specific timeframe (e.g., all assessments completed in 2015, or from January to March 2014).



- Click the **Calendar** icon to view date options.
- Choose from the preset timeframes or select custom dates. Click **Apply** to filter the list.
- To clear the filter, click the **Calendar** icon and click **Clear**.

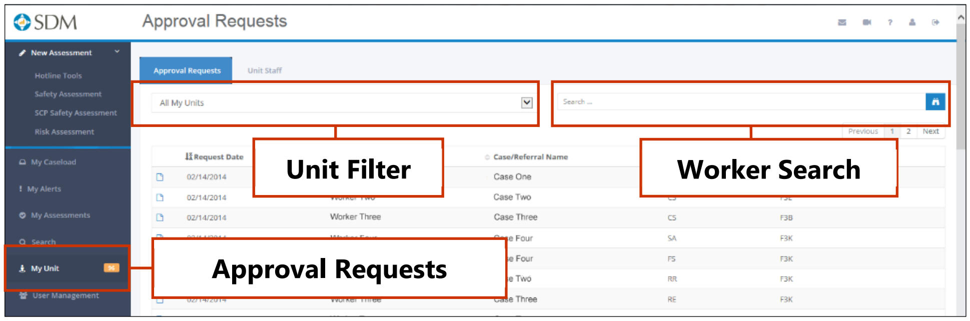
ASSESSMENT ACTIONS

The following table provides an overview of each assessment status and its corresponding available actions.

Assessment Status	Meaning	Available Actions
Incomplete	Not all required items are complete.	• Open to complete • Delete
Complete	All required items are complete; has not been sent for approval.	• Open to edit • Submit for approval* • PDF (not recommended)** • Delete
Approval Submitted	Sent for approval; not yet approved by a supervisor.	• Open*** (as read-only) • Recall (to edit) • Redirect approval* • PDF (not recommended)
Approved	Reviewed and approved by a supervisor.	• Open (as read-only) • PDF
Approved With Modifications	Reviewed, edited, and then approved by a supervisor.	• Open (as read-only) • PDF

These actions must be done from within the assessment; they cannot be done via the* ***Assessment Action* *icon.*
***Per best practice, wait until an assessment is approved before creating a PDF.*
****After opening an assessment with a status of Approval Submitted as read-only, you can recall the approval request and/or redirect the approval request.*

MY UNIT (FOR SUPERVISORS)



The **My Unit** link is only available for supervisors. Click to open the **Approval Requests** screen and see a list of assessments awaiting approval, sorted by most recent request date.

UNIT FILTER

The default view displays assessments awaiting approval for units that you supervise. Access units for which you have approval rights via the drop-down menu. The number in parentheses next to each unit indicates the number of assessments awaiting approval.

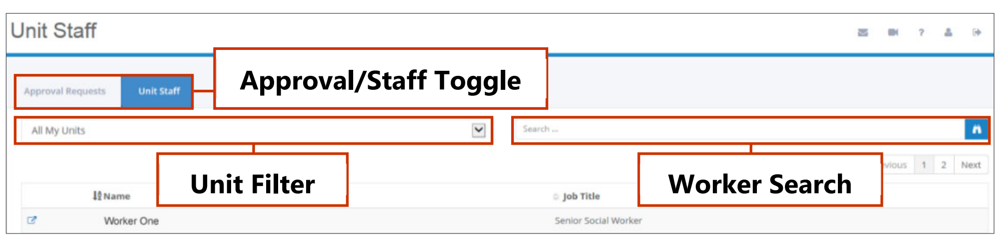
WORKER SEARCH

Enter a client or worker name to limit the list to that client's or worker's assessments only.

APPROVAL/STAFF TOGGLE

Toggle to the **Unit Staff** screen from **Approval Requests**. The default view shows workers in the units that you supervise. Access workers from other units in which you have approval rights via the drop-down menu. You can also search for workers by name.

To view a worker's **My Caseload** and **To Do List**, click the icon to the left of the worker's name.



APPROVING ASSESSMENTS

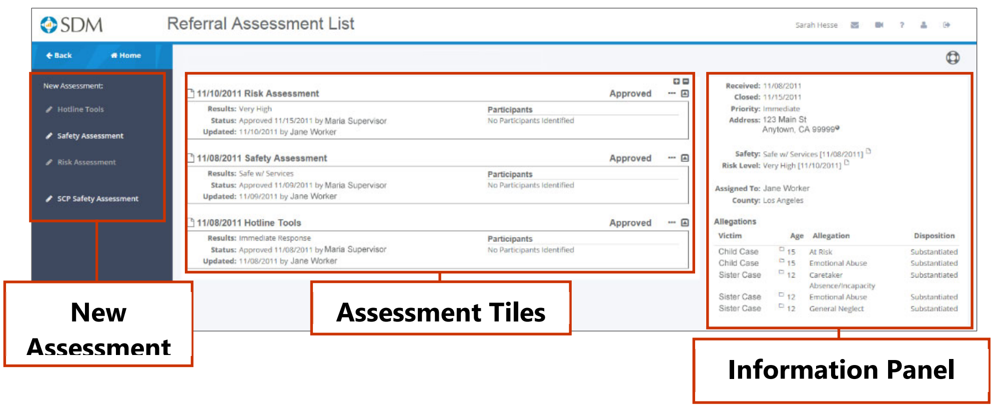
1. Open an assessment to review and make edits as needed. Document any changes in the **Supervisor Comments** field.

2. Click the **APPROVE** button at the bottom of the assessment.

Note: Once an assessment is approved, it becomes officially read-only and cannot be edited.

Please see the **Supervisor Guide**, available from the **Document Library**, for more information on approving assessments.

REFERRAL ASSESSMENT LIST



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

(Referral icon: 📞)

NEW ASSESSMENT

Click an assessment to begin with referral information pre-populated. **Note:** This is the best screen from which to start a new referral assessment.

ASSESSMENT TILES

- All assessments for the referral are displayed in the same tile format as **My Caseload**.
- Each tile contains one assessment and details such as status, date, results, and participants.
- Click the **Open Assessment** icon to view an assessment. (Icon: 🗋)

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:

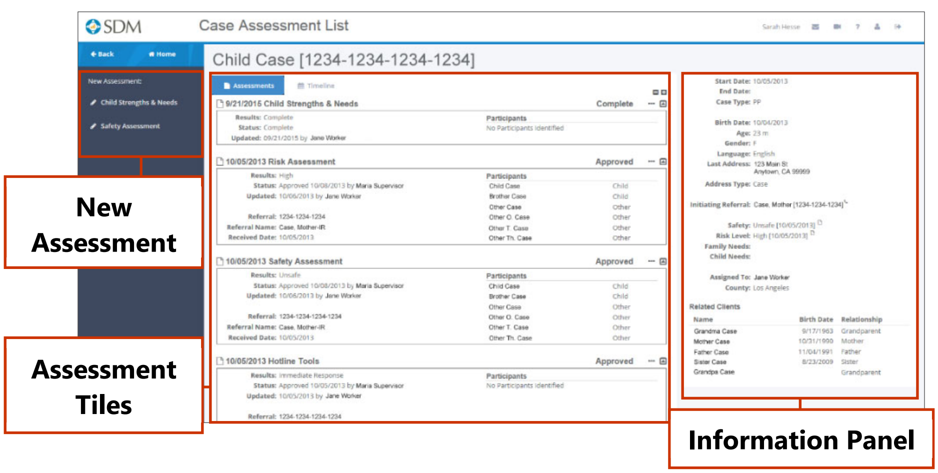
- The **Assessment Action** icon (•••) displays available assessment actions based on the assessment status: Open, Recall, PDF, or Delete. (See page 7 for more information on assessment statuses and actions.)

INFORMATION PANEL

This panel displays pertinent referral information from CWS/CMS to help complete an assessment for the referral. Any overdue assessments are listed at the top. Below that is basic referral information, as well as:

- Safety and risk results;
- Worker assignment information; and
- An **Allegations** section with victims' names and ages, allegation(s), and disposition(s). Anyone on this list who has a case will have a **Case** icon next to their name. Click to open their **Case Assessment List**. (Case icon: 🗀)

CASE ASSESSMENT LIST



The **Case Assessment List** displays all existing assessments for the case. Access this page by clicking the **Case** icon next to a case name anywhere in WebSDM.

(Case icon: 🗀)

NEW ASSESSMENT

Click an assessment name to start that assessment with case information pre-populated. **Note:** This is the best screen from which to start a new case assessment.

ASSESSMENT TILES

- All existing assessments for the case are displayed in the same tile format as My Caseload.

- Each tile contains one assessment and details such as status, date, results, and participants.
- Click the **Open Assessment** icon next to any assessment to view it. (Icon: 🗋)

USER OPTIONS

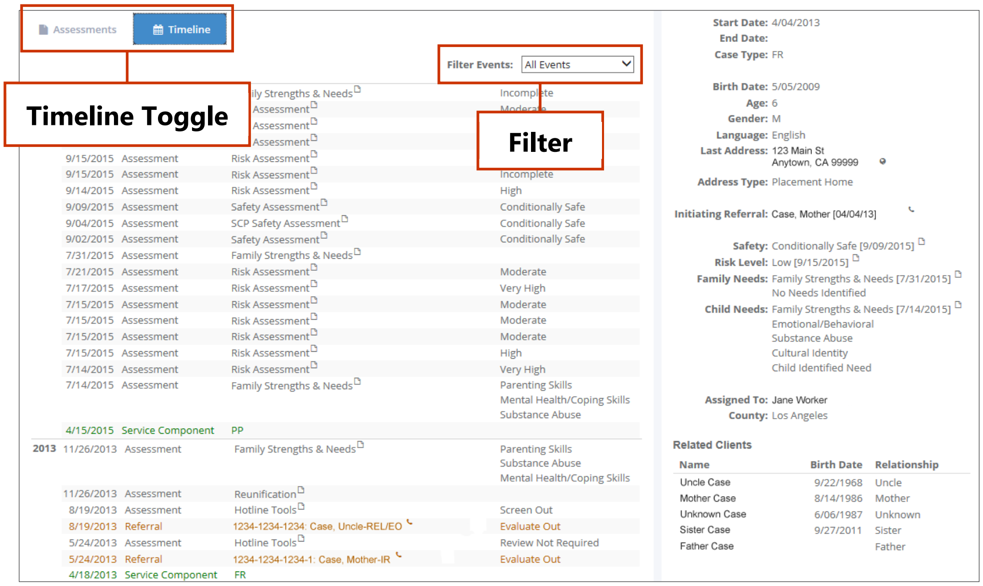
- **Expand all tiles** and show details by clicking the **Expand** icon:
- **Collapse all tiles and hide details** by clicking the **Collapse** icon:
- **Display a single tile** and its details by clicking the **Show** icon:
- **Hide a single tile** and its details by clicking the **Hide** icon:
- The **Assessment Action** icon (•••) displays available assessment actions based on the assessment status: Open, Recall, PDF, or Delete. (See page 6 for more information.)

INFORMATION PANEL

This panel displays pertinent case and referral information from CWS/CMS to help complete an assessment for the case. Any overdue assessments are listed at the top. Below is basic case information, including the most recent address, as well as the following.

- An **Initiating Referral** section with referral details. Click the **Referral** icon to access the Referral Assessment List. (Icon: 📞)
- Assessment results.
- Any client with a relationship to the case (as recorded in CWS/CMS). Anyone on this list who has a case will have a **Case** icon next to their name. Click to open their **Case Assessment List**.

CASE TIMELINE



The **Case Timeline** provides a filterable view of major events for the case (i.e., the focus child).

Note: Assessments and events from other cases that involve the focus child are also included on this list.

- Columns include event date, event, event description, and event result.
- Click the **Open Assessment** icon to view an assessment. (Icon: 🗋)
- Click the **Referral** icon to open the **Referral Assessment List**. (Icon: 📞)

TIMELINE TOGGLE

Click the **timeline toggle** to switch between the timeline and the **Case Assessment List:** 

FILTER

The default view displays all events. Select an event type from the drop-down menu to filter the timeline to only those events. Event types are as follows.

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

To clear the filter, select **All Events** from the drop-down menu.

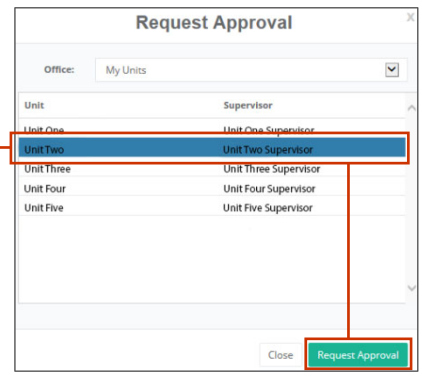
To return to the Case Assessment List, click the timeline toggle.

COMMON ASSESSMENT ACTIONS

REQUESTING APPROVAL

1. Once an assessment is completed and saved, the **REQUEST APPROVAL** button is activated. Click this to open the **Request Approval** screen.
2. Select a unit from the list or browse for others from the **Office** drop-down menu if necessary.
3. After selecting the unit, click the **REQUEST APPROVAL** button.

Assessment footer detail



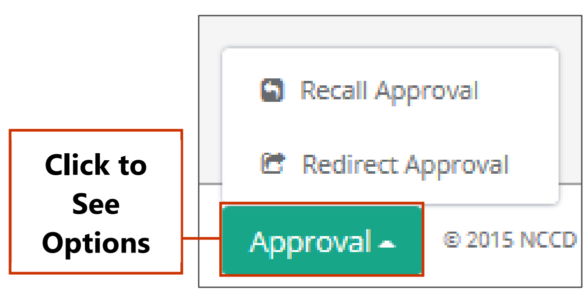
Once the assessment is sent for approval, it becomes read-only. However, you can recall the approval request. This will:

- Remove the assessment from the supervisor's approval list; and
- Allow you to edit the assessment.

RECALLING APPROVAL

Assessments can be recalled from multiple places, but the best place to do so is from within the assessment.

1. Open the assessment.
2. The **APPROVAL** button at the bottom of the assessment now includes an arrow icon. Click this and choose **Recall Approval**.
3. The **Approving Unit** information from the assessment header will be cleared.



Approval button detail

4. Edit as needed and save to enable the **REQUEST APPROVAL** button.
5. Click **REQUEST APPROVAL**, select the unit, and submit.

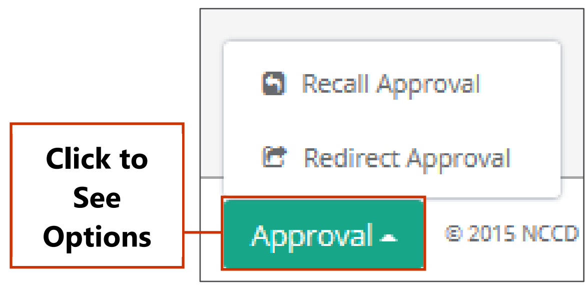
OTHER WAYS TO RECALL AN ASSESSMENT

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

REDIRECTING APPROVAL

If an assessment is sent to the wrong unit for approval, any user can redirect the approval request to a different unit.

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



Approval button detail

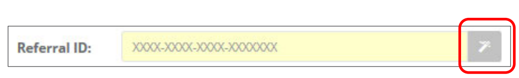
STARTING NEW ASSESSMENTS

Referral assessments

If the referral is not in CWS/CMS yet

On occasion, you may need to begin or complete an assessment for a referral before you have a referral ID. WebSDM can generate a unique placeholder referral ID that allows you to do so.

Note: Once the referral ID is available in CWS/CMS, you must return to any assessment using the placeholder ID and edit the assessment to replace the placeholder ID with the correct referral ID.

1. Open a blank Hotline Tools assessment. **Note:** Placeholder IDs can only be generated on a Hotline Tools assessment.
2. Click the ID generator icon: 

3. WebSDM will populate the Referral ID field with a unique placeholder ID. The ID will always end with six zeros to allow for easy identification throughout WebSDM.
4. Complete the assessment as usual.
5. Once the referral ID is available in CWS/CMS, you must edit all assessments that have a placeholder ID to replace it with the correct referral ID from CWS/CMS.
6. **Note:** You can copy and paste a placeholder ID into other referral assessments for the same referral (safety assessment, risk assessment, or SCP safety assessment), but do not use this ID for more than one referral—generate a new placeholder ID for each referral.
7. **My Alerts** will display a list of all assessments that currently have a placeholder ID.

If the referral is not in WebSDM

1. Copy the referral ID from CWS/CMS.
2. From **My Caseload**, **My Assessments**, or **My Alerts**, click the **New Assessment** icon next to the assessment in the **New Assessment** panel.
3. Paste the referral ID into the ID field and complete the assessment. As long as the ID is copied correctly from CWS/CMS, the assessment will be automatically connected to the referral once WebSDM receives the referral information in the next data extract.

If the referral is in WebSDM

1. Find the referral on **My Caseload**.
2. Click the **Referral** icon to open the **Referral Assessment List**.
3. Click the **New Assessment** icon next to the assessment in the **New Assessment** panel.
4. This will pre-populate the referral ID and name.

Case assessments

1. Find the case on **My Caseload**.
2. Click the **Case** icon to open the **Case Assessment List**.
3. Click the **New Assessment** icon next to the assessment name from the **New Assessment** panel to begin.
4. This will pre-populate the case ID and clients. See **Adding/Removing Clients on Case Assessments** below for more information on editing clients.

Other places to start a new assessment for an existing case/referral

- **Case Assessment List**

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

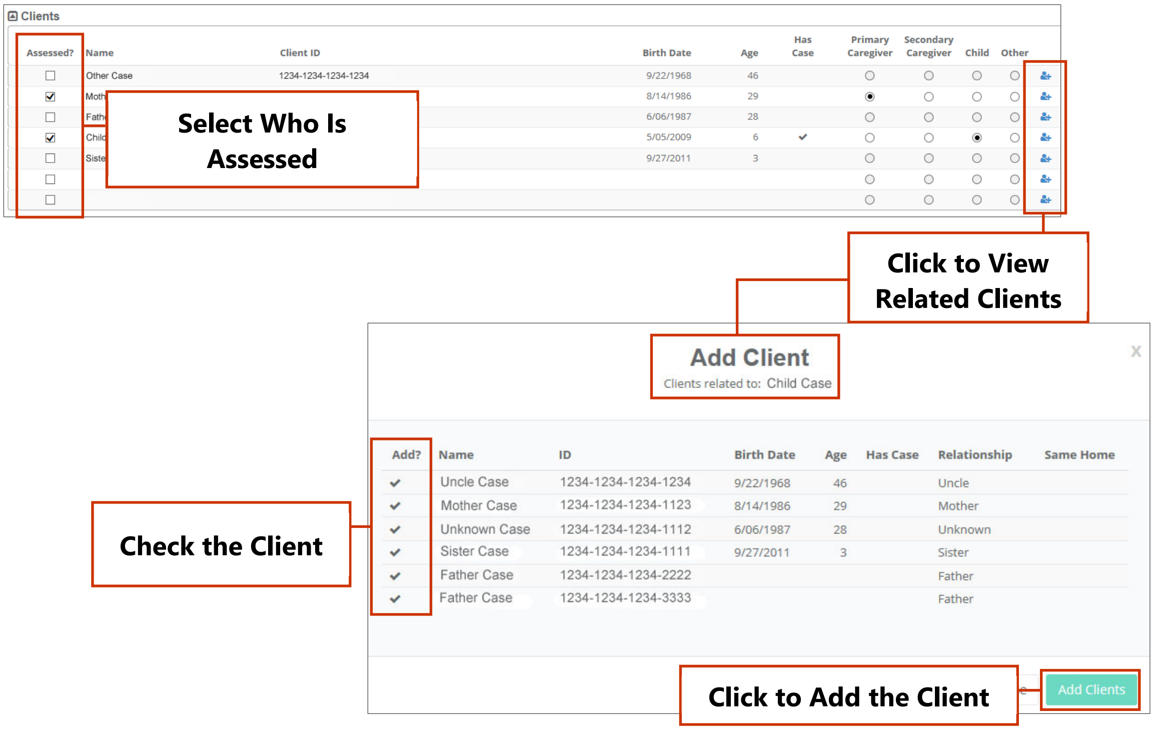
ADDING AND REMOVING CLIENTS ON CASE ASSESSMENTS

For case assessments, the **Clients** section of the assessment lists all clients separately, offering more control over who is assessed.

- To include a client on the assessment, mark their checkbox in the **Assessed?** column.
- To remove a client from the assessment, unmark their checkbox.
- **Note:** Any client included on the assessment must be assigned a role.
- Only one client can be marked as the primary caregiver, and only one can be marked as the secondary caregiver.
- All clients who are noted in CWS/CMS as living in the same household as the focus child are marked by default.

To add additional clients' relatives to the assessment:

1. Click the client's **Add Client** ( ) icon. Anyone with a relationship to this client (as recorded in CWS/CMS) will be displayed on the **Add Client** screen.
2. Mark the client's checkbox in the **Add?** column to add them to the assessment.
3. Click the **ADD CLIENT** button. Once you're returned to the assessment, assign the client a role.



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 open and continue the assessment.

EDITING ASSESSMENTS

Once an assessment has been submitted, it becomes read-only. However, you 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 now includes an arrow. 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

Status	To Edit
Incomplete	Open → Edit → Save → Submit
Complete; not submitted	Open → Edit → Save → Submit
Submitted; not approved	Recall → Edit → Save → Submit
Approved	Cannot be edited

FINDING OVERDUE ASSESSMENTS

My Caseload is the best place to find overdue assessments. Any case or referral tile with any overdue assessments will display a red **Overdue Assessment** (2) 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 tile with any incomplete assessments will display an orange **Incomplete Assessment** (3) 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 from **Case/Referral Assessment List** or **My Assessments**. **Note:** Use caution; this cannot be undone.

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

PDFing ASSESSMENTS

Assessments should only 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**, click the **Assessment Action** icon and choose **PDF**.

GENERAL ASSESSMENT INFORMATION

Note: This is a brief overview of assessment completion information. For more thorough, assessment-specific information, please see the **WebSDM Assessment Completion Guide**, available in the Document Library.

- Any yellow-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 (i.e., grayed out).
- The **REQUEST APPROVAL** and **PDF** buttons will be enabled *only when the assessment is completed and saved.*
- Assessments 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. Recall the approval request to edit the assessment (see page 11).
- For all assessments, the **Assessment History** (☰) icon in the **User Panel** contains a change history for the assessment, including initial creation, submission, edits, etc.

If you try to save an assessment before all required items are completed, a pop-up box will list which items still need to be completed. **Note:** You can still save and close the assessment—the pop-up is just a warning.