User Resources

WebSDM Help Resources

- **Email the help desk:** support@sdmdatadata.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:                   https://ca.sdmdata.org/definitions

*Note:* The Definitions site is available offline (i.e., you don’t have to be logged into WebSDM to access).

**Logging In**

Go to [https://ca.sdmdata.org](https://ca.sdmdata.org).

1. Select your county from the drop-down menu.
2. Enter your user name 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@sdmdatadata.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 (izacao), access the P&P Manual (📖), access your user profile (👤), and log out (注销). 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 Page 3 for more information.
- **My Alerts**: Shows lists of assessments that may require action. See Page 4 for more information.
- **My Assessments**: Full list of all assessments that you have completed/edited. See Page 5 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**: Self-explanatory.
- **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

User Tools

- **Toggle**: Click the toggle ( ) to switch between a tiled view of cases/referrals to 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:
- The default view also sorts upcoming assessments by due date. Click the **Date/Name** toggle to sort assessments by case/referral:
  
  **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.
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.

Statuses

Assessments are grouped by the following statuses:

- **Overdue**, per 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 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 ascending or descending.
- Click the Open Assessment () icon next to any assessment to view it.

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 on what actions are available for an assessment, based on its status.

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.

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

*These actions must be done from within the assessment; they cannot be done via the Assessment Action icon.*

**Per best practice, wait to PDF an assessment until it is approved.**

***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 Approval Requests, which is 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 only that client’s or that worker’s assessments.

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 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.

New Assessment

Click the New Assessment ( ) icon next to an assessment to start that assessment 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.

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 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 the following.

- 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.
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.

New Assessment

Click the New Assessment icon () next to 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.

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.
- 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.
- Click the Referral () icon to open the Referral Assessment List.

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.

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

- Remove the assessment from the supervisor’s approval list; and
- 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.

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.

- 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 Redirect Approval button.

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. 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.

- Open a blank Hotline Tools assessment. **Note:** Placeholders can only be generated on a Hotline Tools assessment.
- Click the ID generator icon:
- 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.
- Complete the assessment as usual.
- Once the referral ID is available in CWS/CMS, you must edit all assessments that have the placeholder ID to replace it with the correct referral ID from CWS/CMS.
- **Note:** While you can copy and paste a placeholder ID into other referral assessments for the same referral (safety assessment, risk assessment, or SCP safety assessment), do not use this ID for more than one referral—generate a new placeholder ID for each referral.
- My Alerts will display a list of all assessments that currently have a placeholder ID.

If the referral is not in WebSDM yet:

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 it.
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 his/her checkbox in the **Assessed?** column.
- To **remove** a client from the assessment, unmark his/her 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 him/her to the assessment.
3. Click the **Add Client** button. Once you’re returned to the assessment, assign the client a role.

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**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.

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**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 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*

<table>
<thead>
<tr>
<th>Status</th>
<th>To Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incomplete</td>
<td>Open → Edit → Save → Submit</td>
</tr>
<tr>
<td>Complete; not submitted</td>
<td>Open → Edit → Save → Submit</td>
</tr>
<tr>
<td>Submitted; not approved</td>
<td>Recall → Edit → Save → Submit</td>
</tr>
<tr>
<td>Approved</td>
<td>Cannot be edited</td>
</tr>
</tbody>
</table>

*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 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 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.