

# WEBSDM USER GUIDE



## CALIFORNIA DEPARTMENT OF SOCIAL SERVICES

February 2025

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### 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](https://EvidentChange.org). Find us on social media by visiting [Linktr.ee/EvidentChange](https://Linktr.ee/EvidentChange).

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# USER RESOURCES

## WEBSDM HELP RESOURCES

- Email the help desk: [support@evidentchange.org](mailto:support@evidentchange.org), or click the **help desk** icon (✉) in the **User panel**.
- Page tour: Click the **tour** icon (📖) 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: All sites are mobile friendly and available in the field. The WebSDM Definitions site is independent of the assessment site. (You do not have to be logged into WebSDM to access it.)

# LOGGING IN

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



1

### Announcements

**Welcome to WebSDM 4.4!**

Here are the key updates in this version, which was released on January 2, 2024.

- SDM assessment updates for all tools
- New tribal information questions
- Statewide release of the safety assessment for congregate care
- Informational panel to determine the appropriate type of safety assessment for specific scenarios

Relevant trainings can be found here: [CA SDM® Core Team and Practice Community \(evidentchange.org\)](#). Please reach out to your supervisor with any questions.

**Using a mobile device?**

WebSDM is usable in a mobile-friendly format for phone and tablet



**Login**

Please select your county.

2 Administration

3 wjames

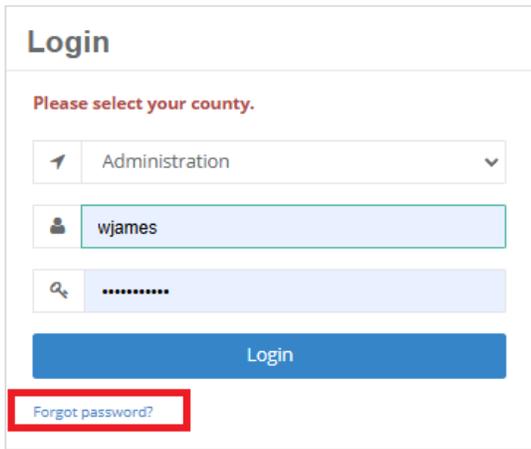
4 Login

[Forgot password?](#)

1. Check for updates in the Announcements section.
2. Select your county from the drop-down menu.
3. Enter your user name and password.
4. Click **LOGIN**.

## PASSWORD RESETS

If you forget your password:



The screenshot shows a login form with the following elements:

- Title:** Login
- Instruction:** Please select your county.
- County Selection:** A dropdown menu currently showing "Administration".
- Username:** A text input field containing "wjames".
- Password:** A text input field with masked characters (dots).
- Login Button:** A blue button labeled "Login".
- Forgot Password:** A red-bordered button labeled "Forgot password?" at the bottom left.

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

If you do not know your user name, see your supervisor or the Structured Decision Making® (SDM) administrator for your county.

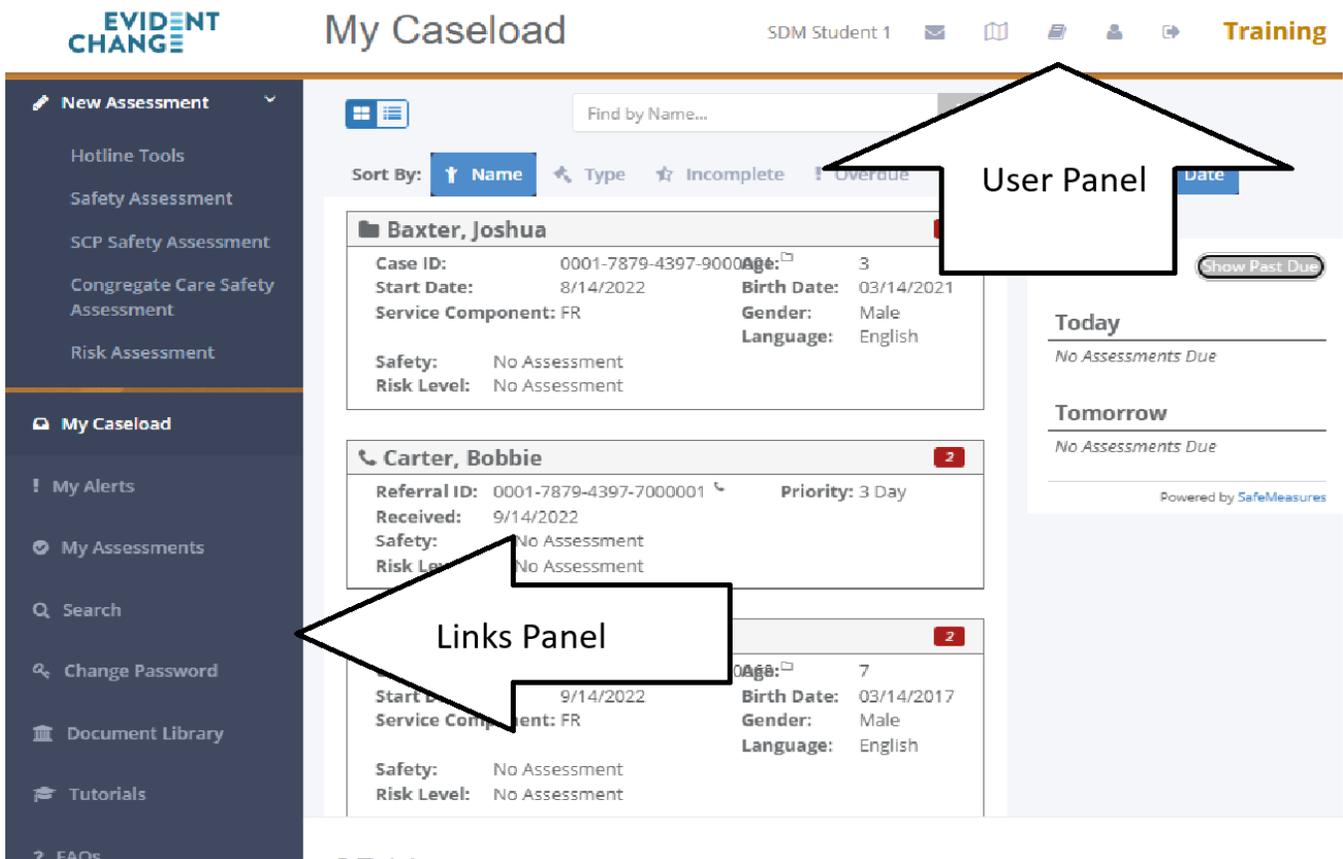
## DATA EXTRACT

WebSDM uses data from the child welfare services case management system (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 *at or after* 7:00 p.m. is available in WebSDM two days later.

For example . . .

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

# MY CASELOAD PAGE



The My Caseload page is the first screen shown after logging in.

## USER PANEL

This panel contains links to:

- Email the WebSDM help desk: ✉
- Launch a page tour: 📖
- Access the policy and procedures (P&P) manual: 📄
- Access your user profile: 👤
- Log out: 🚪

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

The screenshot shows the 'My Caseload' interface. On the left is a dark sidebar with navigation options: 'New Assessment' (with a dropdown arrow), 'Hotline Tools', 'Safety Assessment', 'SCP Safety Assessment', 'Congregate Care Safety Assessment', 'Risk Assessment', 'My Caseload', 'My Alerts', 'My Assessments', and 'Search'. The main area displays a list of cases, with the first one being 'Baxter, Joshua'. Each case tile includes fields for Case ID, Start Date, Service Component, Birth Date, Gender, Language, Safety, and Risk Level. To the right of the case list is a 'User Profile' sidebar containing fields for CWS Login, Email, Password Expiration, and Home Screen. The 'Home Screen' field has a dropdown menu currently set to 'My Caseload'. Two arrows are overlaid on the image: one pointing to the 'User Profile' icon in the top right, and another pointing to the 'Home Screen' dropdown menu.

## LINKS PANEL

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

- **My Caseload:** Your current caseload in a series of tiles. This is the default home page.
- **My Alerts:** Lists of assessments that may require action. See [My Alerts](#) for more information.
- **My Assessments:** Full list of all assessments that you have completed/edited.
- **Search:** Search for any case, referral, or assessment in the county by ID or name.
- **User Management:** For administrators only.
- **Change Password:** Manually update your password.
- **Document Library:** Links to user resources, the P&P manual, and other training materials.
- **Tutorials:** Animated demonstrations of common assessment actions.
- **FAQs:** Frequently asked questions.

# MY CASELOAD

The screenshot shows the 'My Caseload' page for 'SDM Student 1'. The interface includes a left sidebar with navigation options like 'New Assessment', 'Hotline Tool', 'Congregate Assessment', 'Risk Assessment', 'My Assessments', 'Search', 'Change Password', 'Document Library', 'Tutorials', and 'FAQs'. The main area displays a list of cases and referrals. Three items are visible: 'Baxter, Joshua' (Case ID: 0001-7879-4397-9000001, Start Date: 8/14/2022), 'Carter, Bobbie' (Referral ID: 0001-7879-4397-7000001, Received: 9/14/2022), and 'Carter, David' (Case ID: 0001-7879-4398-0000068, Start Date: 9/14/2022). Each tile shows safety and risk level information. A 'To Do List' on the right shows 'Today' and 'Tomorrow' with 'No Assessments Due'. Callouts point to a 'Case Tile' (Baxter, Joshua), a 'Referral Tile' (Carter, Bobbie), 'Sort Options' (Name, ID, Type, Date, Risk, Incomplete, Overdue), and an 'Alert' (red square with '2') on the Carter, David tile.

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.
- **Find by Name...:** Search your caseload for a case or referral name.
- **Sort:** Sort case/referral tiles by name, ID, 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** icon (☐) 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):** 
- **Overdue (red):** 

## 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:



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

**Alert Summary**

**Email Option**

Last Update	Name	Assessment	Elapsed
8/22/2023	1234-1234-1234-1234567	Risk Assessment	450 Days

Assessments:	
Overdue:	0
Upcoming:	0
Incomplete:	0
Pending Approval Request:	1

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

Send this as a daily email

**Email:** student1@notarealaddress.org  
If this is not correct, please contact your local administrator or SDM helpdesk to update your email address.

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 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 has not been submitted for approval).
- **Recently approved** within the last two days (not shown in this section's screenshot).
- **Recently approved with modifications** within the last two days (not shown in this section's screenshot).

## ALERT SUMMARY

The upper-right panel provides a summary view of the page, which you can opt to receive as a daily email. Select the check box to opt in; unselect to opt out. Note: If no assessments meet the criteria for at least one 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

The screenshot shows the 'My Assessments' page. At the top left is the 'EVIDENT CHANGE' logo. The page title is 'My Assessments'. In the top right corner, it says 'SDM Student 1' followed by icons for email, print, user, and a 'Training' link. On the left is a dark sidebar with a 'New Assessment' dropdown and a 'Search & Filter' section. The main content area has a search bar, a 'Select Status...' dropdown, and a 'Date Range ...' field. Below this is a table with the following data:

Updated	ID	Name	Date	Status
11/05/2024	0001-7879-4397-7000001	Carter, Bobbie	05/31/2024	
08/20/2024	0001-7879-4397-4000001	Jefferson, Tammy	08/20/2024	
10/02/2023	0001-7879-4397-4000002	Conseco, Maria	10/02/2023	Risk Assessment
08/22/2023	1234-1234-1234-1234567	Unknown Referral	08/22/2023	Risk Assessment Complete

Below the table, it says 'Showing 1 to 4 of 4 entries'. At the bottom right of the table area, there are 'Previous', '1', and 'Next' navigation buttons. A callout box labeled 'Assessment Action Options' points to a three-dot menu icon in the table.

My Assessments displays all assessments you have completed or edited. Assessments are listed chronologically by most recent update date.

## COLUMNS

Columns include updated date, ID, name, creation date, assessment type, and status.

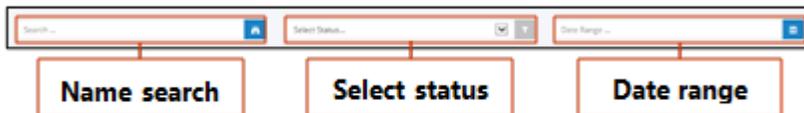
- Click any column heading to sort in ascending or descending order.
- Click the **open assessment** icon (📄) next to any assessment to view it.)

## ASSESSMENT ACTION ICON

Click the **assessment action** icon (  ) to see available actions for the assessment. Review the [Assessment Actions](#) table for more information on what actions are available for an assessment based on its status.

## ASSESSMENT LIST OPTIONS

### NAME SEARCH

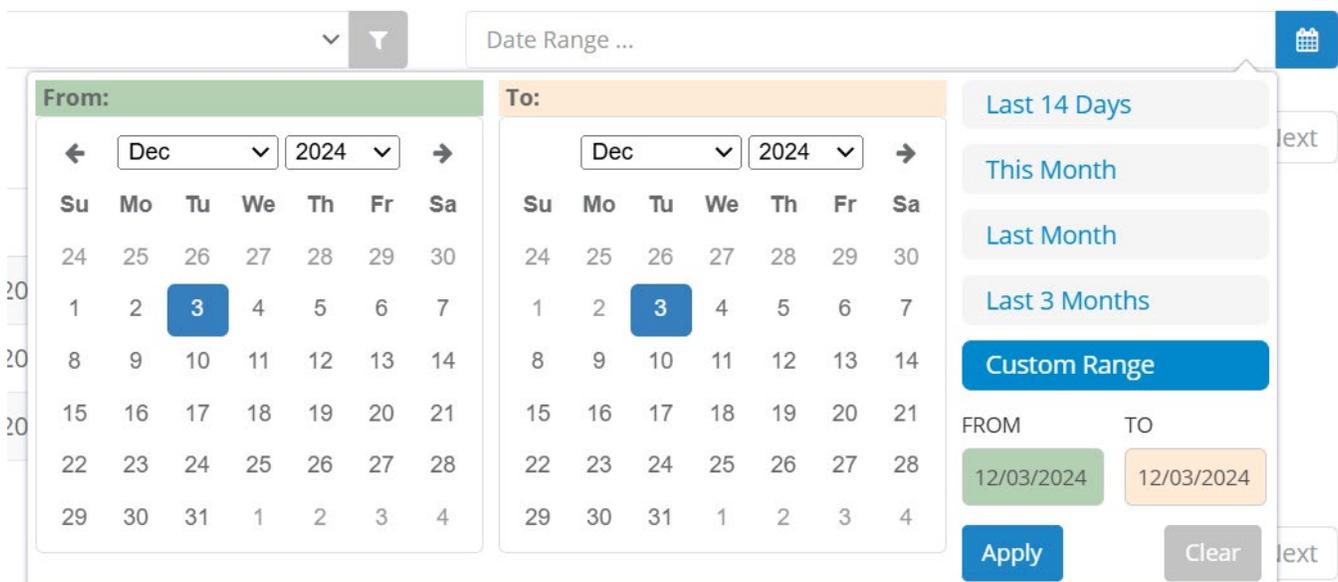


Search for a case/referral name or keyword (alphabetical search only; cannot search for a date or ID).

### 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 show assessments completed during a specific timeframe (e.g., all assessments completed in 2015, or from January to March 2014).

1. Click the **calendar** icon () to view date options.
2. Choose from the preset timeframes or select custom dates. Click **APPLY** to filter the list.
3. 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
<b>Incomplete</b>	Not all required items are complete.	<ul style="list-style-type: none"> <li>• Open to complete</li> <li>• Delete</li> </ul>
<b>Complete</b>	All required items are complete; 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)<sup>†</sup></li> <li>• Delete</li> </ul>
<b>Approval Submitted</b>	Sent for approval; not yet approved by a supervisor.	<ul style="list-style-type: none"> <li>• Open<sup>‡</sup> (as read-only)</li> <li>• Recall (to edit)</li> <li>• Redirect approval*</li> <li>• PDF (not recommended)</li> </ul>
<b>Approved</b>	Reviewed and approved by a supervisor.	<ul style="list-style-type: none"> <li>• Open (as read-only)</li> <li>• PDF</li> </ul>
<b>Approved With Modifications</b>	Reviewed, edited, and then approved by a supervisor.	<ul style="list-style-type: none"> <li>• Open (as read-only)</li> <li>• PDF</li> </ul>

\*These actions must be done from within the assessment; they cannot be done via the **assessment action** icon



<sup>†</sup>Per best practice, wait to PDF an assessment until it is approved.

<sup>‡</sup>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 screenshot shows the 'Unit Staff' page in the Evident Change system. The sidebar on the left contains a 'Filter & Search' section with a search bar and a 'My Unit' link with a notification badge. The main content area has a 'Unit 1 in Office 1' dropdown and a search bar. Below this is a table of staff members with columns for Name and Job Title. A callout box labeled 'Approval Requests' points to the 'My Unit' link. Another callout box labeled 'Filter & Search' points to the search bar in the main content area.

Name	Job Title
SDM Instructor 1	SDM Training Instructor
SDM Instructor 101	SDM Training Supervisor
SDM Instructor 102	SDM Training Supervisor
SDM Instructor 2	SDM Training Instructor
SDM Student 1	SDM Training User
SDM Student 2	SDM Training User
SDM Student 3	SDM Training User
SDM Student 4	SDM Training User
SDM Student 5	SDM Training User
SDM Student 6	SDM Training User
SDM Student 7	SDM Training User
SDM Student 8	SDM Training User
SDM Student 9	SDM Training User
SDM Student 10	SDM Training User
SDM Student 11	SDM Training User
SDM Student 12	SDM Training User
SDM Student 13	SDM Training User
SDM Student 14	SDM Training User

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

## UNIT FILTER

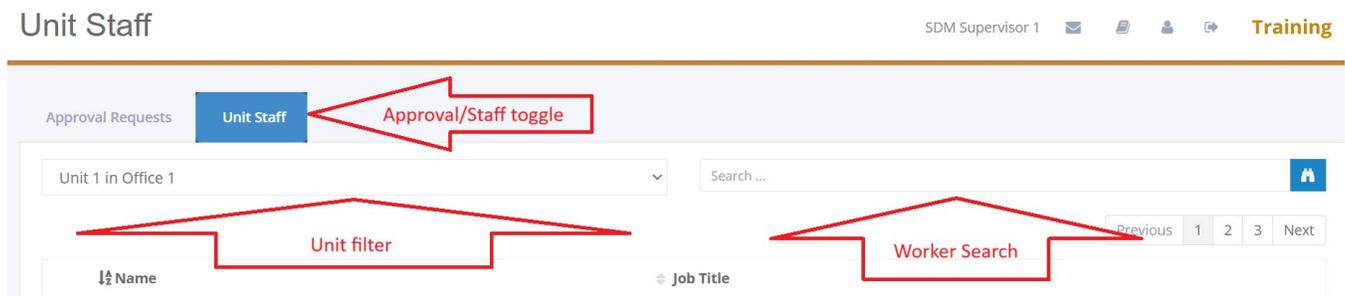
The default view displays assessments awaiting approval for units that you supervise. Access units for which you have approval rights via the drop-down menu. The number in parentheses next to each unit indicates assessments awaiting approval.

## 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 **document tray** 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 **APPROVE** at the bottom of the assessment.

Note: Once an assessment is approved, it becomes read-only.

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

# REFERRAL ASSESSMENT LIST

← Back Home

EVIDENT CHANGE

Referral Assessment List

SDM Supervisor 1 Training

Carter, Bobbie [0001-7881-7846-1000001]

11/15/2024 Hotline Tools Incomplete

Results: 24 Hour  
Status: Incomplete

Participants

Simms, Randall	Other
Carter, Bobbie	Alleged Perpetrator
Carter, David	Alleged Victim

Overdue Assessments Due

Safety Assessment	9/24/2022
Risk Assessment	10/14/2022

Powered by SafeMeasures

Received: 9/14/2022  
Closed:  
Priority: 3 Day  
Address: 4262 Wilson Ave  
San Diego, CA 92104

Safety:  
Risk Level:

Assigned To: Student 10, SDM  
County: Alameda

Allegations

Victim	Age	Allegation	Disposition
Carter, David	5	General Neglect	Substantiated
Carter, David	5	Physical Abuse	Substantiated

New Assessment Creator

Assessment Tile

Referral Information

In any caseload list, click on a **referral** icon (📞)

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 an assessment to start it 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.

## 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. After 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 ASSESSMENT LIST

In any caseload list, click the **case** icon ()

The **Case Assessment List** displays all existing assessments for the case. This is the same layout as the Referral Assessment List.

## 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.

## 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 Data Extract section 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 beginning. Later 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

Case Assessment List SDM Supervisor 1      **Training**

Baxter, Joshua [0002-7040-7606-7000001]

Assessments **Timeline**

**Timeline toggle** **Filter** Filter Events: All Events

Date	Event	Location/Person	Category
2024 12/03/2024	New Setting	Shiela Baxter, Los Angeles	Relative Guardian
12/03/2024	Removal	County Welfare Department	Physical Abuse
2022 9/14/2022	Referral	0002-7040-7606-2000001: Jefferson, Tammy	Immediate
8/14/2022	Service Component	FR	
8/14/2022	Case Open	0002-7040-7606-7000001: Baxter, Joshua	County Welfare Department

**Overdue Assessments** **Due**

Reunification	11/12/2022
Family Strengths & Needs	11/12/2022

Powered by SafeMeasures

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Start Date: 8/14/2022  
End Date:  
Service Component: FR

Birth Date: 3/14/2021  
Age: 3

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:

 Assessments

 Timeline

## 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.

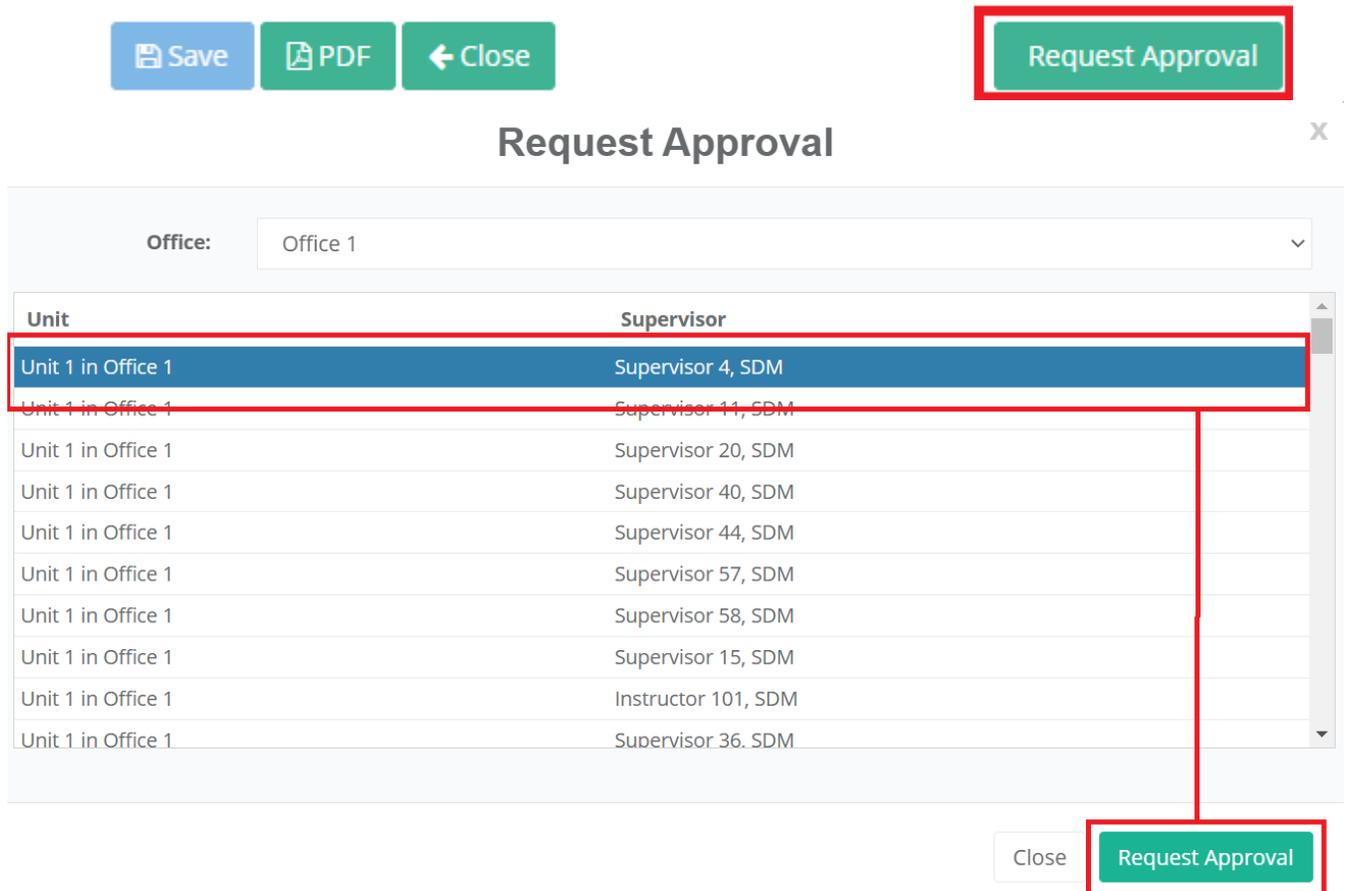
- Assessments
- Case openings
- New settings
- Referrals
- Removals
- Service component changes

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 **REQUEST APPROVAL**.



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 it.



## RECALLING APPROVAL

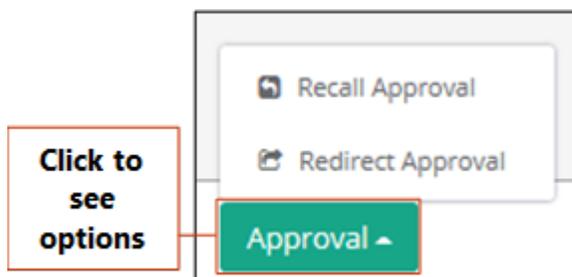
Assessments can be recalled from multiple places, but the best place to do so is from within the assessment.

1. Open the assessment.
2. The **APPROVAL** button at the bottom of the assessment now includes an **arrow** icon (🔼). Click this and select **Recall Approval**.
3. The **Approving Unit** information is cleared from the assessment header.
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 click **Recall Approval**. 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 **APPROVAL** at the bottom of the assessment.
3. Select **Redirect Approval**.
4. Select the new unit from the **Redirect Approval** screen.
5. Click **REQUEST APPROVAL**.

# 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.

Referral ID:

XXXX-XXXX-XXXX-XXXXXXX



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 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.

6. **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.

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.

This will pre-populate the case ID and clients. See the following section, **Adding and Removing Clients on Case Assessments**, for more information on editing clients.

Other places to start a new assessment for an existing case/referral include the following.

- 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, select their check box in the **Assessed?** column. To remove a client from the assessment, unselect their check box.

Any client included on the assessment must be assigned a role.

Only one client can be selected as the primary caregiver, and only one can be selected as secondary. All clients who are noted in CWS/CMS as living in the same household as the focus child are selected 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. Select the client's check box in the **Add?** column to add them to the assessment.
3. Click **ADD CLIENTS**. Once you are returned to the assessment, assign the client a role.

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="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Mother		8/14/1986	29	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Father		6/06/1987	28	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Child		5/05/2009	6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Sister		9/27/2011	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Select who is

Click to view related

Add Client							
Clients related to: Child Case							
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	<input type="checkbox"/>	Uncle	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Mother Case	1234-1234-1234-1123	8/14/1986	29	<input checked="" type="checkbox"/>	Mother	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Unknown Case	1234-1234-1234-1112	6/06/1987	28	<input type="checkbox"/>	Unknown	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Sister Case	1234-1234-1234-1111	9/27/2011	3	<input type="checkbox"/>	Sister	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Father Case	1234-1234-1234-2222			<input type="checkbox"/>	Father	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Father Case	1234-1234-1234-3333			<input type="checkbox"/>	Father	<input type="checkbox"/>

Check the client

Click to add the

Add Clients

### Clients

Assessed?	Name	Age	Has Case	Primary Caregiver	Secondary Caregiver	Child	Other
<input checked="" type="checkbox"/>	Carter, David	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Simms, Randall	36	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Carter, Bobbie	29	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Select clients to be included

Click to see more related clients

### Add Client

Clients related to: Jefferson, John

Add?	Name	Age	Has Case	Relationship	Same Home
<input checked="" type="checkbox"/>	Jefferson, Tammy	38	<input checked="" type="checkbox"/>	Mother	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Baxter, Joshua	3	<input checked="" type="checkbox"/>	Brother	<input type="checkbox"/>

Select clients that need to be added

Click to have them added

Close

Add Clients

## SAVING AND CONTINUING INCOMPLETE ASSESSMENTS

1. While in an assessment, click **SAVE** 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

**Incomplete, complete** but not submitted, or **submitted** but 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** (🔴<sup>2</sup>) 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 filter to **Approval Submitted**.

## DELETING ASSESSMENTS

Incomplete assessments or those that 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. Click **Delete**.

## PDFING ASSESSMENTS

Assessments should only be PDFed once they are completed, saved (no changes pending), and no longer in need of edits.

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

## GENERAL ASSESSMENT INFORMATION

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 (grayed out).
- The **Request Approval** and **PDF** buttons are 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 [Recalling Approval](#)).
- 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 window will list which items still need to be completed. You can still save and close the assessment—the pop-up is just a warning.