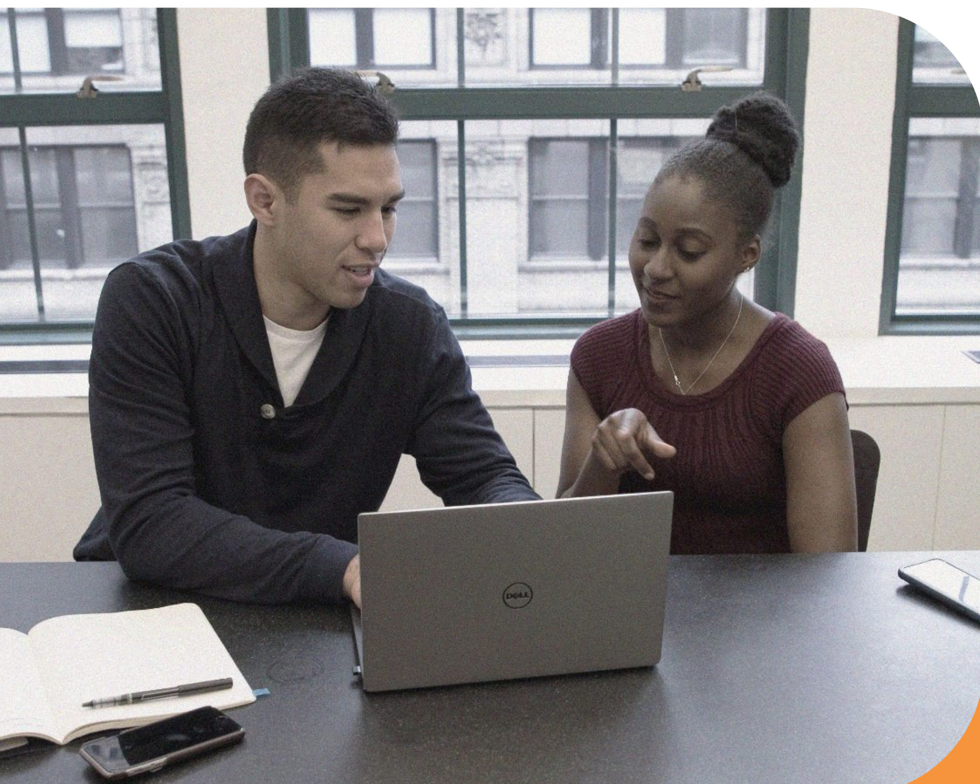
EVIDENT CHANGE
Inform Systems. Transform Lives.

TRAINER MANUAL

WebSDM New User Training



CALIFORNIA DEPARTMENT OF SOCIAL SERVICES

February 2025

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 . Find us on social media by visiting Linktr.ee/EvidentChange.

CONTENTS

HOW TO USE THIS MANUAL

This manual contains information for conducting basic WebSDM navigation training. It covers scheduling and preparing for a training, a recommended agenda, and the training curriculum.

TRAINING PREPARATIONS

Reference this section for a list of tasks to complete before conducting a WebSDM training.

AGENDA

This is the recommended agenda for a three-hour training. If you need to condense the training, shorten the time during Module 9 for assessment demonstrations or self-guided assessment completion.

TRAINING MODULES

The training curriculum is presented in modules. Each provides supporting information to help you better understand and train the material.

OBJECTIVES

Summarizes the module goals.

KEY POINTS

Provides the most important takeaways for the module. If you do not wish to use the script, the key points can serve as an outline to ensure that you cover the primary concepts of each module.

TRAINER NOTES

Provides extra information, such as on county-specific policies.

LANGUAGE/ACTION

A two-column presentation of a script and corresponding actions.

AN

Advanced navigation. You can train these additional advanced components as time and aptitude allows. Otherwise, the material is included in the user guide; direct participants there to learn about these components.

SUPERVISOR TRAINING

The main curriculum does not include supervisor-specific components. Module 9b contains a supervisor module that you can use to train these components as needed. If you wish to incorporate this module into the training session, do so during Module 9 while workers practice completing assessments. If you do not have time to teach the material, advise supervisors that all information from the module is available in the supervisor guide, located in the Document Library.

RELATED TRAINING CONTENT

Participants must attend the two-day Common Core Structured Tools and Assessment Skills Lab. training before beginning their work with families.

TRAINING PREPARATIONS

1. CHECK FOR UPDATED MATERIALS.

Check New User Training Materials at https://ca.sdmdata.org/Resources/Documents to ensure that you have the most current training materials.

2. COPY THE TRAINING MATERIALS.

Make copies for all participants. The training materials are in color, but they can be copied in black and white if necessary.

REQUIRED

- Name tent, which includes the URL for the training site
- Navigation exercise worksheet
- WebSDM training assessments answer key
- Sign-in sheet, used to assign each participant a user name for the training site. In a virtual delivery, to ensure a unique number for each learner, have everyone "raise" their hand, assign a student number to each, and have them lower their hand.

OPTIONAL

In addition to the previously mentioned materials, you can also provide each participant with the WebSDM user guide.

If you do not have the budget for copying, these are all available as PDFs in the document library. The navigation exercise questions are included in the PowerPoint (see Navigation Exercise) if you need to cut down on copying or if you wish to conduct the exercise as a group activity.

3. PREPARE THE TRAINING ROOM.

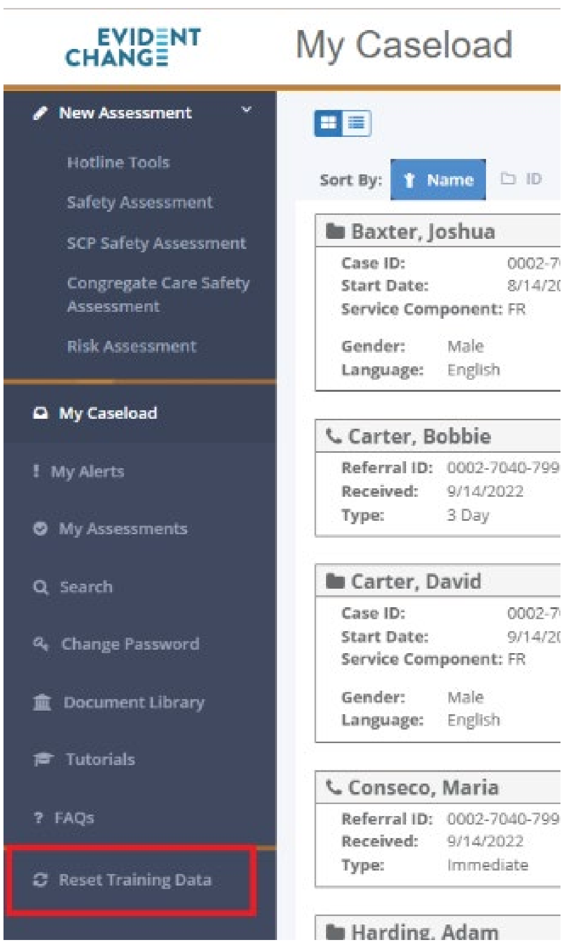
- **Internet:** The training is conducted almost entirely online, so a reliable Internet connection is required. As multiple people access the training website simultaneously, there will be slowdowns, so have as strong a connection as possible.
- **Projector and screen:** Please arrange for a projector and any other hardware necessary to project your computer onto a larger screen. You may wish to allow time for troubleshooting as necessary.

- **Power strips:** This is a hands-on, interactive training, requiring participants to use their laptops or tablets (if the training room does not provide computers). Power strips and extension cords may be helpful in case participants need to charge their devices during training. Also, you may wish to have an extra laptop in case a participant forgets theirs.

4. DOWNLOAD THE TRAINING POWERPOINT AND BOOKMARK THE TRAINING SITE.

Ensure that the training PowerPoint is saved to the computer you will use for the training. Edit the first slide to include the name of the agency. Bookmark the training site for easy access.

5. RESET TRAINING SITE DATA.



Before each training, log into the training site as an instructor, selecting the county in which you are training. Click the Reset Training Data link underneath the Links panel to clear all previous assessments and any errant password changes or profile settings. Problems with access that learners experience in training will often resolve if you reset the data and ask them to refresh the web page.

6. FAMILIARIZE YOURSELF WITH THE CURRICULUM AND THE ASSESSMENTS.

Plan to study this manual, the WebSDM User Guide, and the Assessments Answer Key before conducting your first training. If you opt to demonstrate assessments rather than have participants complete them on their own during Module 9, it will go more smoothly if you practice completing the assessments beforehand.

Note: Your trainer account contains a handful of assessments in various stages of completion that you can use for demonstration purposes. You can modify these however you wish. When you reset the training data, however, any changes you have made will be erased, and the assessments will return to their original state. Therefore, when preparing for a training, be sure to reset training data before making any changes to an assessment.

7. ASK FOR HELP.

If you have any questions about anything in this curriculum, please contact the WebSDM help desk (support@sdmdata.org). As emphasized in the training, the help desk staff are there to help users, but we are also there to support you.

AGENDA

MORNING SESSIONS

9:00–9:10 a.m.	Registration
9:10–9:45 a.m.	Modules 1–4
9:45–10:05 a.m.	Navigation Exercise
10:05–10:15 a.m.	**Break**
10:15–11:15 a.m.	Modules 5–8
11:15–11:55 a.m.	Module 9 (*Optional: Supervisor module*)
11:55 a.m. – 12:00 p.m.	Module 10

AFTERNOON SESSIONS

1:00–1:10 p.m.	Registration
1:10–1:45 p.m.	Modules 1–4
1:45–2:05 p.m.	Navigation Exercise
2:05–2:15 p.m.	**Break**
2:15–3:15 p.m.	Modules 5–8
3:15–3:55 p.m.	Module 9 (*or 9b: Supervisor module*)
3:55–4:00 p.m.	Module 10

REGISTRATION

As participants arrive, hand them a set of training materials and ask them to print their names on the sign-in sheet. The first worker to register will be student1, the second will be student2, and so on. Ask participants to note their user names on their name tents.

User Names: Each county has four instructor logins, 50 worker logins, and 50 supervisor logins as shown here.

ROLE	USER NAME
Trainer	instructor1, instructor2, instructor101, instructor102[1]
Supervisor	supervisor1 – supervisor50
Worker	student1 – student50

For the **password**, login in at cacwt., click on Institution Page, click on Curriculum Content Library, click Common Core Training Series, and scroll down to the webSDM_Training_Site_Instructions.pdf file and open that.

Note: Users' county WebSDM accounts are created by their local county WebSDM administrator. They will usually receive login information via email. User names generally match their child welfare services case management system (CWS/CMS) user names.

URLS

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

[1] The instructor1 and instructor2 logins mirror worker accounts (i.e., they do not include the supervisor-specific functions). The instructor101 and instructor102 logins mirror supervisor accounts.

MODULE 1: INTRODUCTION TO WEBSDM

OBJECTIVES

- Participants will understand that the purpose of this training is to learn how to complete Structured Decision Making® (SDM) assessments in WebSDM, not how to use critical thinking to answer the assessment items.
- Participants will learn how Evident Change uploads CWS/CMS data into WebSDM each night.

KEY POINTS

- WebSDM is used to complete SDM® assessments and to track past and upcoming assessments.
- WebSDM incorporates nightly extracts of CWS/CMS data.
- The training website is designed to practice completing assessments.
- The URL for the training site is https://ca-training.sdmdata.org
- The URL for the definitions site is https://ca.sdmdata.org/definitions which can be loaded on any mobile device and saved to the home screen or set as a bookmark for easy reference when access to WebSDM is limited.

TRAINER NOTES

- Please display the title slide of the PowerPoint on your screen as participants arrive and register.
- Sign into WebSDM, but keep your window minimized until the end of the module.
- Before moving on to Module 2, minimize the PowerPoint, but do not close it.

LANGUAGE	ACTION
Welcome, everyone. My name is [name], and I work for [agency] as a [job role]. I'm here today to teach you how to use WebSDM. WebSDM is a computer application built specifically to complete SDM assessments. Here is the agenda for the day. First, I'll provide some background information about WebSDM. Then, we'll log in to the training version of WebSDM, go through its features, and complete some assessments as a group using an answer key.	Show Agenda slide.
This training's focus is not on teaching you how to answer assessment items—that critical thinking component was covered during Common Core training. Our focus is to teach you how to complete assessments in WebSDM and how to use WebSDM to manage past and upcoming assessments.	Show Objectives slide.

LANGUAGE	ACTION
We will use a training site today that includes the same information from the case examples that you used during Common Core training. Once you start completing assessments, you'll see that the site looks and works just like the training site, but instead of training data, you'll see your own caseload.	Show WebSDM Training Site slide.
You may be wondering how WebSDM will know what cases or referrals are on your caseload. WebSDM receives updated data from CWS/CMS every night. This is called the data extract. It's important to understand how this works, because the data extract affects when you see new CWS/CMS data in WebSDM.	Show Extract Process slide.
Every night around 7:00 p.m., CWS/CMS data are sent to Evident Change to be analyzed and uploaded into SafeMeasures and WebSDM. If you enter a new referral into CWS/CMS at noon on Monday, you'll see it on Tuesday. However, if you enter that referral into CWS/CMS at 10:00 p.m. on Monday, you won't see it until Wednesday. For those of you who work with referrals, there may be times when you need to start an assessment for a referral that hasn't made it into WebSDM yet. There are ways of working around this, which we will cover later.	Show Example of Extract Timeline slide.
At times, you will need access to the questions and definitions in WebSDM when you are not on the website (e.g., in case consultation). Everyone take out your phones, open a web browser, and search the term "California SDM definitions." The definitions site should be the top hit. Open it and then add it to your home screen or set a bookmark that you know will be easy for you to find later. Use this site when you may not have easy access to WebSDM; using the structure and definitions on this site will support your critical thinking and make completing the assessments a breeze when you return to your desk.	Show Search on Your Phone slide. Note: Minimize the PowerPoint before moving on, but do not close it. You will display the Logging In slide before the first group exercise.
At this point, I'm going to log in to the training site and show you a few features. For now, you will just watch my screen. Then we'll get everyone logged in so you can practice navigating.	

MODULE 2: WEBSDM ORIENTATION

OBJECTIVES

- Participants will understand the structure and functions of the User panel and the Links panel.
- Participants will know where to access help in WebSDM.

KEY POINTS

- The Links panel is visible from any of the “My” screens.
- WebSDM has many help materials, including page tours, a direct link to email the WebSDM help desk, a PDF of the P&P Manual, quick reference guides, tutorials, and more. Note that the training site may have broken links at times, but those links should work in the live site that participants use for their casework.

TRAINER NOTES

- When appropriate, you can train extra features, noted as AN (advanced navigation).
- Your trainer account contains extra assessments in various stages of completion for demonstration purposes. Participant logins will not have these assessments.

LEGEND

ICON	DESCRIPTION	USE
✉	Help desk	Email the WebSDM help desk. This does not function in the training site for students but is available on the live site.
🗺	Page tour	Launch a tour of the page.
📘	P&P manual	Open a searchable PDF of the P&P manual.
👤	User profile	View user info and change the home page.
➡	Log out	End the WebSDM session.

SCRIPT

LANGUAGE	ACTION
This is WebSDM. The first page you see—your home page—defaults to My Caseload. We will cover My Caseload in more detail in a bit, but first I'll go through the other information on this screen.	
The series of icons in the right corner make up the User panel. The envelope (*) is a quick way to email the help desk. Click the icon, type your message, click Send, and someone at the WebSDM help desk will be in touch within one business day at most. Questions about initial setup of your account are handled by your county's help desk.	Click the **Help** icon to demonstrate the email form. Caution: Do not send an email. Click **CANCEL**.
Next is a map icon (), which launches a tour of the current screen. We'll cover a lot of information today, and you may not remember everything, so this is a great way to refresh your knowledge of the features of a page.	Highlight. **AN:** Demo a few steps of the tour.
The book icon () opens a new tab with an interactive version of the P&P manual. Each section of the manual is linked on the left. This is a standalone website, so you don't have to be in WebSDM to access it.	Highlight and open to display the P&P Manual. Close the tab.
The person icon () opens your user profile. This is where you go to change your home page. We'll cover this later once you've seen the three pages you can choose from as your home page.	Open and briefly demo the drop-down menu. Note: You will cover the user profile more thoroughly later, so you can move through this quickly.
And finally, the last icon () will log you out of your WebSDM session.	Highlight. Caution: Do not demo.
On the left is the Links panel. This panel contains links to start new referral assessments, links to the different "My" screens, and links to user resources.	Highlight each section.
Notice the three "My" links: My Caseload, My Alerts, and My Assessments. We'll cover these in more detail later, but I want to show you one thing now. The Links panel and the User panel are available no matter which "My" screen I'm on. Watch as I open My Alerts—the panels do not change. The same applies when I open My Assessments and when I return to My Caseload.	Highlight. • Open **My Alerts**. • Open **My Assessments**. • Open **My Caseload**.
The search link allows you to search for any assessment, case, referral, or staff person.	Click the **Search** link.
The document library contains links to various SDM resources: user guides, quick reference guides, and P&P materials. Note that when I select a document from this screen, it opens in a new tab.	Click **Document Library** and highlight the sections. Open a quick reference guide. Close the tab.
The tutorials link contains tutorials on basic assessment actions, such as saving an incomplete assessment, deleting an assessment, or requesting approval.	Click **Tutorials**, but do not open any.
Finally, the FAQ link contains various FAQs about the SDM system and WebSDM. While you're encouraged to contact the help desk whenever you have a question, you may want to check the FAQs first—the answer you're looking for may already be in an FAQ.	Click **FAQs**. Close the tab and open **My Caseload**.

MODULE 3: MY CASELOAD AND TO DO LIST

OBJECTIVES

Participants will know:

- What information can be found on My Caseload;
- How to toggle the To Do List to show or hide past due assessments;
- How to group assessments by due date or case/referral; and
- How to navigate to the Case/Referral Assessment List.

KEY POINTS

- My Caseload is the default homepage.
- Each tile contains a case or referral with basic demographic and assessment information.
- The To Do List displays upcoming assessments, grouped by date or case/referral.
- Click a case or referral name to open a list of all assessments associated with that case/referral.

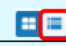
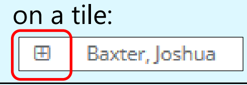
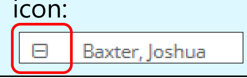
TRAINER NOTES

- Watch for various AN notes.
- You will navigate to Nelson Layer's Case Assessment List at the end of this module.

LEGEND

ICON	DESCRIPTION	MEANING
	Case	Click to view the Case Assessment List.
	Referral	Click to view the Referral Assessment List.
2	Overdue	The referral/case has at least one overdue assessment. The number indicates how many assessments are overdue.
3	Incomplete	The referral/case has at least one incomplete assessment. The number indicates how many assessments are incomplete.
	New assessment	Click to start a new assessment.

SCRIPT

LANGUAGE	ACTION
Now we'll cover the information on My Caseload. Each tile contains one case or referral. Each tile header displays the name and an icon identifying the tile as a case () or referral ().	Highlight Joshua's **case** icon () and Maria's **referral** icon ().
If the case/referral has any past due or incomplete assessments, you'll see a small icon in the right corner of the header. Red (2) indicates past due, orange (3) indicates incomplete, and the number indicates how many assessments are overdue or incomplete.	
The body of the tile contains the referral/case ID, basic information such as start date and type, and basic demographic information.	Highlight.
Before the tiles, notice the Sort By: options. You can sort the tiles by name, ID, type, date, risk, incomplete status, or overdue status. You can also search for a full or partial case or referral name. Keep in mind that this only searches your own caseload. To search for a case or referral on someone else's caseload, use the search link on the Links panel.	Sort the tiles by **Overdue**. Click **Name** before moving on.
AN: If you want to see your caseload as a list rather than in tiles, click the **List** toggle at the top of the page.	**AN:** Click the toggle: 
AN: If you want to see details for a case/referral, click the expand icon ( ).	**AN:** Click the **expand** icon on a tile: 
AN: Click the collapse icon ( ) to collapse it.	**AN:** Click the **collapse** icon: 
On the right is the To Do List. This lists your upcoming assessments, the case/referral name, and the due date. By default, the list hides any overdue assessments and sorts assessments by due date.	Highlight.
You have two toggle options: First, you can click **Show Past Due** to display past-due assessments.	Click **Show Past Due**:  Click again to hide.
Second, you can view the list by name. Doing so displays all upcoming and past-due assessments, grouped by case/referral. Past-due assessments are listed in red.	Click **Name**: 
Notice the pencil icon ( ) next to each assessment on this list. This is the new assessment icon, which appears in many different places throughout WebSDM. Whenever you see this, you can click it to start a new assessment.	Highlight.
To sum up, My Caseload provides an overview of your whole caseload along with at-a-glance case or referral information. To see more information about a case or referral along with a detailed list of its existing SDM assessments, click on the case or referral name to open their assessment list. I'm going to open Nelson Layer's Case Assessment List (CAL).	Click Nelson's name to open his CAL.

MODULE 4: CASE ASSESSMENT LIST, CASE TIMELINE, AND REFERRAL ASSESSMENT LIST

OBJECTIVES

Participants will understand:

- What information can be found on the Referral Assessment List (RAL) and the CAL;
- That all assessments for a case/referral are listed on these pages;
- What information is available on the Case Information Panel (CIP) and the Referral Information Panel (RIP);
- To toggle to the case timeline to see and filter historical case events;
- How to access other CALs and RALs for clients associated with a case/referral; and
- That the CAL/RAL is the best place to start a new assessment for a case/referral.

KEY POINTS

- All assessments completed or changed by the user for a case/referral are listed on these pages.
- The RIPs and CIPs contain key data from CWS/CMS to help users complete assessments.
- The case timeline displays historical events from CWS/CMS.
- The timeline can be filtered to a specific event type, such as assessments, referrals, or removals.
- The RAL/CAL is the best place to start a new assessment for an existing case or referral.

TRAINER NOTES

- Participants will not see any assessments on their CAL (Nelson Layer) or RAL (Ann Harding).
- Your instructor account has pre-completed assessments for demonstration purposes.
- Participants will log in to the training site at the end of this module.

LEGEND

ICON	DESCRIPTION	MEANING
	Collapse/expand all tiles	Collapse hides all assessment tiles; expand shows all.
	Show/hide single tile	Show expands a single assessment tile; hide collapses it.
	Open assessment	Click to view an existing assessment.
	Assessment action	Available actions based on assessment status.

SCRIPT

LANGUAGE	ACTION
The page title now says Case Assessment List. Under that is the case name and the case ID. This screen shows all assessments that you have created or edited for the case. My instructor profile has some example assessments so you can see how this screen will look once you start completing assessments.	Highlight page title.
The CAL uses a tile layout like My Caseload. Each tile contains information for one assessment. You will see the assessment name, the completion date, participants, results, and status.	Highlight the location of each.
AN: By default, all tiles are displayed. Collapse all tiles by clicking the collapse () icon. Expand all tiles by clicking the expand () icon. The hide () icon collapses a single tile, and the show () icon expands a single tile.	**AN:** Demo each.
You'll also see the **open assessment** (/) icon throughout WebSDM. Click this to view the assessment. We'll cover this in more detail later, so for now I'll quickly open and close an assessment.	Highlight **open assessment** icon (/). Open and close any assessment.
Notice that Nelson Layer has a family strengths and needs assessment. This assessment has been replaced in California by the Child and Adolescent Needs and Strengths (CANS) assessment. The FSNA is still available for reference, but . . . [based on your county's progress implementing CANS, direct learners to refrain from filling out FSNA or CSNA assessments going forward and refer them to the CANS procedures for your county].	
On the right is the Case Information Panel (CIP), which contains basic case details from CWS/CMS that you may find useful as you complete assessments. • At the very beginning is a list of any <u>overdue assessments</u>. • Next is information such as age and address as well as <u>basic case information</u> such as ID, type, and start date. • After that is the <u>initiating referral</u> and results from any completed referral assessments. • At the end is a list of <u>related clients</u>, which shows everyone who, per CWS/CMS, is related to Nelson (the focus child of the case), along with their ages and relationship to Nelson. We see that he has six relatives. If you can tell there are names you can't scroll down to, enlarge the browser window.	Highlight each section.
Note the case icons () next to Ann, Mark, and Adam. This means that these clients also have a case in CWS/CMS. Clicking a client's case icon takes you to that person's CAL. The same applies with the referral icon in the initiating referral section. I'll come back to this in a bit to demonstrate.	Highlight **case** () icon. Highlight **referral** () icon in the Initiating Referral section.
Each case has a Case Timeline, which you open by clicking the Timeline toggle. This provides a snapshot of key events for the focus child, including referrals, removals, or assessments. We see events going back to the beginning of the case.	Highlight and click **Timeline**: 
Each event involving the focus child displays in its own row, along with basic event information. For an assessment, the timeline lists the date and result. For a referral, it lists the allegation. For a removal, it lists the removal agency. As you can see, this useful tool lets you see an overview of the case without having to hunt around in CWS/CMS.	Highlight each.

LANGUAGE	ACTION
You can see a list of event categories by opening the drop-down menu. The timeline displays assessments, case openings, new settings, referrals, removals, and service component changes. To focus on a specific event type, you can filter the timeline. I'll choose referrals. Once I choose the event type, the timeline reloads with just those events. This particular case only has one referral, but if there were more, they would all be displayed.	Open the drop-down menu. Select **Referral**.
To clear the filter, select All Events from the drop-down menu. To go back to the assessment list, click the Assessments toggle.	Select **All Events**. Click **Assessments**.
Let's take a look at the New Assessment panel, which I pointed out earlier. Notice the list of assessments, each with a pencil icon ( ). **Q:** Who remembers what clicking the pencil icon does? **A:** Starts a new assessment.	Highlight.
Because I'm on Nelson's CAL, if I start a new assessment, WebSDM will pre-populate some of Nelson's basic information, like his case ID and the household. This is different from the New Assessment links that we saw on the My Caseload screen. Those links are only for referral assessments, and they won't have any pre-populated referral information.	
So, to start a new assessment for an *existing* case or referral, open that case or referral's assessment list first, and then click the new assessment icon ( ) next to the assessment you want to start. I'll demonstrate.	Click **Reunification** under New Assessment.
I've clicked Reunification under the New Assessment list. Notice that since we can have more than one household open for reunification services, we need to add a parent's name in the Household Name field, and the related clients from his CIP are pre-populated in the Clients section. We'll cover this in more detail later, so for now I'm going to close the assessment. Notice it will ask me to confirm that I don't need to save my work.	Highlight the Clients section. Click **CLOSE**.
We'll complete an assessment together soon, but first I want to show you the RAL. **Q:** Who can tell me what happens when I click the **case** icon ( )? **A:** Opens that case's CAL. **Q:** What about the **referral** icon ( )? **A:** Opens that referral's RAL.	
Remember—anywhere you see a case or referral icon, you can click it to open that person's assessment list. **Q:** If I want to open the assessment list for this case's initiating referral, what and where would I click? **A:** Ann's referral icon in the Initiating Referral section of the CIP.	Click on Ann's **referral** icon ( ) in the Initiating Referral section.
This is the Referral Assessment List. Like the CAL, the name and ID are at the top, and each referral assessment is displayed in a tile.	Highlight page title, name, and ID.
Let's talk about a couple of features you'll see on both the RAL and the CAL. Notice the upper-right corner of the tile where it says Approved. This is the assessment status.	Highlight Approved.

LANGUAGE	ACTION
Assessments can have one of four statuses in WebSDM. • Incomplete: The assessment has been started but not completed. • Complete: The assessment is complete but has not been submitted to a supervisor for approval. • Submitted for Approval: The assessment has been saved, completed, and submitted for approval. • Approved: The assessment has been approved by a supervisor.	
The assessment status serves a couple of purposes. First, it's a good visual cue to remind you if you haven't finished or submitted an assessment. Second, the assessment status determines what actions you can perform on an assessment, such as editing, deleting, or PDFing.	
Notice the horizontal row of three dots to the left of the status. This is the assessment action (•••) icon, and when you click it, you'll see which actions are available for the assessment. On this example, because the assessment status is Approved, the available actions are Open and PDF. Don't worry about memorizing what actions are available for a status—WebSDM will automatically determine that. Alternatively, you can check your user guide, which contains a more thorough explanation.	Click the **assessment action** icon (•••) and highlight the choices.
One last thing: Note the Referral Information Panel (RIP) on the right. This contains the same type of information as the CIP, but this one is referral-based. It starts with a list of any overdue assessments, followed by referral information like the date and response priority. At the bottom is a section for the referral's victims, their ages, and the allegations.	Highlight.
Now we're going to work through a few exercises to give you some hands-on practice with WebSDM. Let's get everyone logged in. Open an Internet browser and enter the URL for the training site (https://ca-training.sdmdata.org). If you don't have name tents with the URL, searching "California SDM training" should bring it up as the top hit. 1. First, choose your county from the drop-down menu. 2. Next, enter the username you were given when you signed in. 3. Finally, everyone's password is "training".	Open the PowerPoint and display the Logging In slide. Direct participants to the URL.

NAVIGATION EXERCISE ANSWER KEY

Basic Navigation, My Caseload, To Do List, and Assessment Lists

TRAINER

Participants can complete these exercises on their own (or with a partner), or you can conduct this as an interactive group exercise. Many answers and dates will change as we updated the vignettes over time. Please check the answers on the training site before or with the learners. These questions are available in the PowerPoint (Navigation Exercise). Participants can take a 10-minute break after completing this exercise.

LINKS PANEL

1. In the User panel, click the **P&P manual** icon () and expand the Reunification link in the left panel.

   How many subcategories are available?

   Nine: Policies & Procedures, All Definitions, Reunification Risk, Visitation Plan, Reunification Safety, Decision Trees, Permanency Plan, Recommendation, Sibling

2. Close the tab. Open the Document Library (Links panel). Open the icon legend. What do each of these icons mean?

	Referral (opens referral assessment list)
	Case (opens case assessment list)
	Available assessment actions (open, delete, PDF)
	Start a new blank assessment
	Open an existing assessment

   Close the tab before continuing.

MY CASELOAD

3. Return to My Caseload. What was the date of Maria Conseco's referral? ________Dynamic[2]___________

[2] These dates are regularly and automatically updated by WebSDM. Knowing where to find the dates is more important than the answers themselves. The same concept applies to all answers on this key.

4. How many cases/referrals have an incomplete assessment? ___________Dynamic_________________

5. How many cases/referrals have an overdue assessment? _____________Dynamic__________________

TO DO LIST

6. Which assessment is due next, and for whose case/referral? What is the due date?

   Assessment: ____

   Case/Referral: ____

   Date: ____

7. Click the Name toggle. Which case/referral has the most overdue assessments?

   Several will have three

ASSESSMENT LISTS

8. Open Adam Harding's assessment list and look at the information panel. What is his case type? How many relatives also have cases?

   Service Component:________________________________PP____________________

   Relatives: _______Three: Ann, Mark, and Nelson_______________________________

9. Open Adam's case timeline. Filter to Service Component. When did Adam's most recent service component start?

   ________________Dynamic_________

10. Choose All Events from the Events Filter. What was the allegation associated with Adam's removal?

    ________________Physical abuse_______

11. Look again at Adam's information panel. From the Related Clients section, open Nelson's assessment list. What is the date of the initiating referral for Nelson?

________________Dynamic_____________

12. Open Ann's assessment list; her name is a link next to Initiating Referral. Does she have any overdue assessments? What was the allegation? Was it substantiated?

Overdue? ___________Dynamic____

Allegation: __________Physical Abuse____

Substantiated? ______Yes____

MODULE 5: COMPLETING A REFERRAL SAFETY ASSESSMENT

OBJECTIVES

Participants will:

- Practice completing a safety assessment using an answer key;
- See how WebSDM responds to certain actions, such as enabling/disabling different sections of an assessment; and
- Know when an assessment is completed and ready to be submitted for approval.

KEY POINTS

- The referral ID and date must be entered before the assessment can be saved as incomplete.
- Warning icons alert users to required items.
- The assessment is dynamic. Certain questions will be enabled or disabled based on user response.
- The status bar at the top of the assessment tells users when an assessment is complete.
- The buttons at the bottom of the assessment also tell users when an assessment is complete.

TRAINER NOTES

- Participants will use an answer key instead of the case example. This keeps the focus on the mechanics of completing assessments rather than the critical thinking component that was covered during Common Core training.
- Because you will pause on occasion to highlight how WebSDM responds to certain actions, please emphasize that participants should not work ahead.
- After completing the assessment through Section 2, you will save and close it to show participants how the assessment displays on various "My" screens when it is incomplete.
- Before moving on to the next module, you will cover how to start an assessment for a referral before it has appeared in WebSDM (due to the data extract). You will close this assessment to talk about these referrals and then go to My Assessments to open the safety assessment before starting Module 6.

LEGEND

ICON	DESCRIPTION	MEANING
⚠	Required	The assessment item must be completed.
?	Item definition	The item definition, which comes directly from the P&P manual.
⊘	Cannot select	Item not selectable—assessment is read-only, or item does not apply.

SCRIPT

LANGUAGE	ACTION
Please refer to the Referral Safety Assessment Answer Key. We'll use this to complete an assessment for Tammy Jefferson. Remember, this training focuses on the mechanics of completing assessments, not how to answer the questions. We won't focus on why we select a response, but rather on what happens when we do. Also, we'll do this together so I can highlight how WebSDM responds to certain actions. We will save the assessment about halfway through and close it so we can cover working with incomplete assessments elsewhere in WebSDM.	
Let's get started. As I've mentioned, you can start a new assessment from a few different places in WebSDM, but the best place is from the case or referral assessment list. We'll go through the process when starting from My Caseload. 1. First, click the My Caseload link. 2. Find Tammy Jefferson on the list. Either scroll until you find her, or use the search box. 3. Click on Tammy's name to open her RAL. 4. Click the Safety Assessment link in the New Assessment panel. Notice that a pop-up asks questions to confirm you are starting with the correct version of the safety assessment options. Scroll down to "Open a new Safety Assessment" and select it.	Perform each step. Ensure that everyone has a safety assessment open before starting.
Here is a blank safety assessment. All assessments have a header, then the assessment items, sections for overrides (on most assessments) and comments, and buttons at the bottom for finishing the assessment.	Highlight each section.
Notice the orange bar across the top. This is the status bar. Once you have completed all required items, this bar will turn green. At this point in the process, it tells us two things: The assessment is incomplete, and there are no changes pending.	Highlight.
One last thing before we start completing the assessment: Items with a warning icon (⚠) are required, as are any yellow-shaded text boxes.	⚠ Highlight the warning icon:
Assessment Header	
Because we started the assessment from Tammy's RAL, her referral ID and name are already populated. First, we'll enter the assessment date. Click the **calendar** icon (📅) and then click the date. We'll use today's date.	Highlight fields. Click the **calendar** icon (📅) and select **today's date**.

LANGUAGE	ACTION
Notice that the **SAVE** button at the bottom is activated, and the orange status bar now says Changes Pending at the right side. At this point, because the assessment has the ID and date recorded, you can save and close the assessment without losing your work. Remember: You can always save an incomplete assessment and come back to it later.	Highlight the **SAVE** button and point out Changes Pending.
The household name should be the household you're currently assessing, which is Tammy's. So we'll enter her name in the Household Name field and Joshua's name in Children Assessed.	Enter "Tammy Jefferson" in the **Household Name** field. Enter "Joshua Jefferson" in the **Names of Children Assessed** field.
Next, there were allegations in this household, so select Yes. This is the initial assessment, so select Initial. Since the father did report tribal affiliation, select Reason to Believe, No, and Contact with tribe not attempted. We know the father is part of another household, but that doesn't change Joshua's potential status as an Indian child.	• Select **Yes**. • Select **Initial**. • Select **Yes, Reason to believe, No, Contact with tribe(s) not attempted**
Factors Influencing Child Vulnerability	
For this next section, the only applicable factor is the child's age, so select Age 0–5 years.	Select **Age 0–5 years**.
Section 1: Safety Threats and Protective Capacities	
Question 1 is the first example of how WebSDM responds to your answers. Before we answer this question, try to click on one of the check boxes. **Q:** What happens? **A:** Nothing; they're all disabled. (Icon:) **Q:** Now try clicking No, then try clicking a check box. What happens? **A:** Still disabled. WebSDM won't make you complete unnecessary items.	Hover over the subitems. Select **No** and hover again.
Q: What happens when we change our answer to Yes? **A:** Subitems are enabled and red (i.e., required). Because we chose Yes, WebSDM requires us to select at least one of these subitems. You will see this on all assessments—WebSDM always lets you know when you must select a response.	Select **Yes**.
We'll select the first subitem. As soon as we do, the red warning icon to the right of the item goes away, and the other subitems turn black. This is because we're only required to select one response. Note that even though it's not required, you should consider and select all applicable items.	Select **Serious injury or abuse to child**.
Answer No for questions 2 through 6. Notice how the warning icon goes away after you answer each question.	Select **No** for Q2 – Q6.
Next, select Yes for question 7, No for 8, and No for 9.	• Q7: **Yes**. • Q8: **No**. • Q9: **No**.

LANGUAGE	ACTION
Question 10 is a good example of a required text box. Right now it's gray (disabled) because we haven't chosen a response. Let's see what happens if we choose Yes. **Q:** What happens? **A:** Text box turns yellow; warning icon appears.	Q10: **Yes**.
If we were to keep the Yes response, WebSDM would require us to enter a response, which will be the case for all assessments with Other items. But we'll change our answer to No. **Q:** What happens when we click No? **A:** Text box is disabled (i.e., goes gray); warning icon disappears.	Change Q10 to **No**.
Section 1A: Caregiver Complicating Behaviors	
We won't select any items in this section, but I want to highlight a feature that you'll find very helpful when completing assessments. Notice the question mark icon (?) next to each assessment item. Let's click the icon next to substance abuse. A pop-up opens with the definition for substance abuse, which is taken directly from the P&P manual. Every item on every assessment has a help pop-up, giving you quick, easy access to any item's definition. Click the X in the upper-right corner of the pop-up to close it.	Open the help for substance abuse. Close the pop-up.
Section 2: Household Strengths and Protective Actions	
Q: Based on what we know about required items, do we need to select any of these? **A:** No (no warning icon). However, you still must consider whether any apply. In our case, none do, so we won't select any items in this section.	
Pause to save and close the assessment as incomplete.	
At this point, we're going to save and close the assessment so we can see how an incomplete assessment looks elsewhere in WebSDM. Please click the Save button in the bottom left. Notice the warning pop-up in the upper-right corner—this is just a warning to let you know which items are still incomplete. You don't have to complete them before you save or close the assessment.	Click **SAVE**. Note: If anyone says they can't save, advise them to enter an assessment date—this is the only entry required to save the assessment.
Next, click **CLOSE** to exit out of the assessment.	Click **CLOSE**.
Is everyone on Tammy's RAL? Here is our assessment in a tile, along with the date, status, and participants (these are determined by the referral entry in CWS/CMS). Note that the status says Incomplete.	Note: If not, click My Caseload and select the Tammy Jefferson referral. Highlight **Incomplete**.
Next, we'll click the Home icon to return to My Caseload.	Click **Home** Home.

LANGUAGE	ACTION
Let's take another look at Tammy's referral on My Caseload. Scroll or search for her name. Notice that there is now an icon in her tile header. **Q:** Who remembers what this tells us? **A:** The referral has one (noted by the number in the indicator) incomplete assessment (noted by the orange color). Remember: Orange indicates incomplete assessments, and red indicates overdue assessments.	Scroll to Tammy. Highlight **incomplete** icon.
Before we continue completing the safety assessment, I want to show you how incomplete assessments look on one more screen. Please click My Assessments in the Links panel.	Click **My Assessments**.
My Assessments is essentially a master list of any assessment you've ever created or changed. Once you start completing assessments, they'll be listed on this page in order of the last time they were updated. Notice the Status column, where it says Incomplete.	Highlight "Incomplete" in the **Status** column.
Also notice the **assessment action** icon (▪▪▪). Click that to see what actions we can perform for this assessment based on its "incomplete" status. This says we can open it or delete it. Do not delete it, or you'll have to start over. Instead, choose Open so we can continue completing the assessment.	Click **assessment action** icon (▪▪▪). Select **Open**.
Section 3: Safety Interventions	
Please scroll down to Section 3. Because we selected safety threats, we must review these interventions to determine whether the safety decision will be Safe With Plan or Unsafe. Before we complete this, I'd like you to watch my screen so I can show you what would have happened if we hadn't selected any safety threats.	Scroll to Section 3.
I'll answer No to all of the safety threat questions. Watch the status bar at the top. Once I change the last one to No, the status bar turns green, and the assessment is considered complete. **Q:** Who can tell me why? **A:** If there aren't any safety threats, the child is safe.	Scroll to Safety Threats. Change 1 and 7 to "No."
When I scroll back to Section 3, it says, "No safety threats are present. Safety Interventions not required." Section 3 goes on to indicate that the safety decision is Safe. This is another example of how WebSDM will change based on your responses.	Scroll to Section 3. Highlight the "Safe" decision.
I'm going to change my responses back so we can continue together. Pay attention to the status bar as I do this. As soon as I change my answer to question 1, the status bar turns orange, because whenever a safety threat is selected, we have to consider interventions.	Scroll to Safety Threats. Change 1 and 7 to **Yes**. Select the first Q1 subitem. Scroll to Section 3.
These interventions relate to the two possible decisions: Safe With Plan or Unsafe. If we were to select item 9, we would be required to enter supporting text. However, for our case example, the best choice is item 10 in Section 4: Placement Interventions. Please select 10 and watch the status bar: It turns green and says Complete.	Highlight the **text box** on 9. Select 10. Highlight "Complete."
At this point, you would add any comments you feel are appropriate.	Highlight **Staff Person Comments** section.

LANGUAGE	ACTION
Before we save the assessment, notice the Request Approval button on the bottom right, which is currently disabled. Click Save, and watch what happens to the Request Approval button. It is now enabled. This is how you know for certain that the assessment is completed and ready to be submitted to a supervisor for approval.	Highlight the **REQUEST APPROVAL** button. Then click **SAVE** and hover over **REQUEST APPROVAL** again.
Demonstrate starting an assessment without an existing referral in WebSDM.	
Now that we've learned how to start an assessment for an existing referral, I want to talk about how to start an assessment for a new referral that has been entered into CWS/CMS but has not yet made it into WebSDM. Please leave your assessment open and just watch my screen. I'll return to this assessment in a minute.	**Close** the assessment.
Earlier, I told you about the data extract and how it affects when you see new CWS/CMS data in WebSDM. Because WebSDM only receives new CWS/CMS data once a day, there may be times when you need to start an assessment before the data extract has picked up the referral. Even though WebSDM won't display the referral yet, you can still start the assessment. There are two ways to do this.	Go to **My Caseload**.
With the first scenario, you will copy the referral ID from CWS/CMS and paste it into a blank assessment. This is when you would use the new assessment links on any of the "My" pages rather than the new assessment links on an assessment list.	Highlight the **New Assessment** panel.
Starting on any of the "My" screens, click the appropriate link in the New Assessment section of the Links panel. Paste the ID into the ID field, enter the referral and household names, and complete the assessment as usual. Once the new extract is loaded, the assessment will be connected to the referral as long as you copied the ID correctly from CWS/CMS.	Open any blank assessment and highlight the **ID** and **Name** fields. Close before moving on.
AN: The second scenario is uncommon and is used only when you're not able to access the referral ID from CWS/CMS. Rather than copying and pasting the ID from CWS/CMS, you enter a placeholder ID. You will complete and save the assessment, but you won't request approval (if required) yet. Once you have an ID, you will replace the placeholder ID with the correct ID and then submit for approval (if applicable). Please check with your county WebSDM admin to confirm they approve of this workaround. If you have questions, please check with your county WebSDM admin. Explain that workers can always use the Definitions site to think through a safety assessment in the field and what their answers would be even if they cannot access WebSDM to record the answers in the moment.	Note: You can skip this if you know for certain that the participants' county does not use this method.
Now I'll go to My Assessments and reopen our completed assessment so we can continue.	Go to **My Assessments** and open the assessment.

MODULE 6: REQUESTING, RECALLING, AND REDIRECTING APPROVAL

OBJECTIVES

Participants will:

- Learn how to submit an assessment for approval;
- Understand that assessments become read-only once submitted;
- Learn how to recall an approval request to edit an assessment; and
- Learn how to redirect an approval request.

KEY POINTS

- Assessments can be submitted for approval only once they are complete and saved.
- Assessments become read-only once submitted.
- Users can recall their approval request, which removes the assessment from the approving supervisor's queue and allows users to edit. After editing the assessment, users must save and resubmit for approval.
- If users submit an assessment to the wrong unit, they can redirect the approval request to a different unit.

SCRIPT

LANGUAGE	ACTION
Now that the assessment is done, we need to send it to a supervisor for approval. WebSDM won't let you request approval until the assessment has been completed and saved, which is why the Request Approval button is disabled until you've finished all items and saved the assessment.	Highlight **REQUEST APPROVAL**.
Please click the Request Approval button to open the Request Approval screen. If you don't see your unit or supervisor on this short list, you can search for any unit in your county via the drop-down menu. We will submit our assessment to Supervisor 25, so please scroll through the list until you find Supervisor 25. Click to select.	Click **REQUEST APPROVAL**. Expand the drop-down menu. Find and select Supervisor 25.
Go ahead and click Request Approval. WebSDM takes us back to the assessment.	Click **REQUEST APPROVAL**.

LANGUAGE	ACTION
A couple of things have changed on this assessment. First, notice that the **Approval Unit** field in the assessment header shows the unit to which we submitted the request. Second, the assessment is now read-only. If I try to change an answer, WebSDM won't let me.	Highlight **Approval Unit**. Click a check box to show that it is disabled.
However, if you realize that you made a mistake or need to change a response, you can recall the approval request. Doing this removes the assessment from your supervisor's approval list and allows you to edit the assessment.	
Let's try it. First, we need to recall the approval request. Notice that the Request Approval button looks different—it says Approval and has a small arrow. Click this button. It gives us two options: Recall Approval and Redirect Approval. We want to recall, so click Recall Approval.	Click **APPROVAL**. Click **RECALL APPROVAL**.
Q: Who can tell me what's changed? **A:** Approval info is gone from header, the approval button now says Request Approval, and we can now edit.	
Let's make a simple edit. Let's say that we learned at the last minute that Joshua has a significant medical disorder. Go to Factors Influencing Child Vulnerability and select that item. The Save button is now enabled, and the Request Approval button is disabled. **Q:** Can anyone tell me why the Request Approval button is disabled? **A:** The assessment must be saved before we can request approval. The status bar will also remind us that we need to save.	Select **Significant diagnosed medical or mental disorder**. Highlight the **Save** and **Request Approval** buttons. Highlight **Changes Pending**.
Let's save the assessment so we can resubmit. Click Save. Click Request Approval.	Click **SAVE**. Click **REQUEST APPROVAL**. Select Supervisor 25. Click **REQUEST APPROVAL**.
Before we move on, let's talk about the other option on the approval button: Redirect Approval. If you ever send an approval request to the wrong supervisor, you can redirect the request to someone else.	
We won't redirect the approval request, but I'll quickly demonstrate for you. I click the Approval button and choose Redirect Approval. When the Redirect Approval screen opens, I would select the new supervisor and click the REDIRECT APPROVAL button. But since I'm just demonstrating, I'll click the CLOSE button instead.	Click **APPROVAL** and select **Redirect Approval**. Click **CLOSE**.

MODULE 7: MY ALERTS AND MY ASSESSMENTS

OBJECTIVES

Participants will know how to:

- Read My Alerts and opt in for daily email summaries;
- Work with the information available on My Assessments; and
- Set a new home page.

KEY POINTS

- My Alerts lists assessments due soon or waiting to be submitted for approval.
- Users can choose to receive a daily summary of their alerts via email.
- My Assessments offers multiple sort and search options.
- Users can open, recall, PDF, or delete assessments from My Assessments.
- Users can select My Caseload, My Alerts, or My Assessments as their home page.

TRAINER NOTES

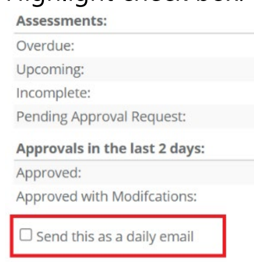
- This section returns to a watch-then-do model. Discourage participants from clicking on their own to keep their focus on your screen.
- Different counties have different rules for when and how to upload assessment PDFs to CWS/CMS. If anyone asks for details, refer them to their supervisor.

LEGEND

ICON	DESCRIPTION	MEANING
	User profile	Click to view user details and to change the homepage.

SCRIPT

LANGUAGE	ACTION
For this next section, please watch my screen as I go through a few more features. You can exit out of the assessment by clicking the CLOSE button at the bottom.	Click **CLOSE**.

LANGUAGE	ACTION
I'm going to return to my home page and open My Alerts from the Links panel.	Click the **Home** icon and open My Alerts.
My Alerts shows you lists of assessments that meet certain criteria. Note the different sections. • <u>Overdue Assessments</u>, per SDM policy. • <u>Upcoming Assessments</u>, due in the next three days. • <u>Incomplete Assessments</u>, left incomplete for more than five days. • <u>Assessments Pending Approval Request</u>, completed for more than five days without being submitted for approval. • <u>Assessments Recently Approved</u>, approved in the last two days. • <u>Assessments Recently Approved w/Modifications</u>, assessments approved in the last two days that were modified before being approved. This is currently the only way within WebSDM to identify which assessments were modified.	Highlight each section as you describe it.
Notice the upper-right corner. This panel is an aggregate of all the information in the different sections. You can opt to receive this via email by clicking "Send this as a daily email." Whenever at least one assessment meets the criteria for any section, you will receive an email. If no assessments meet the criteria, you will not receive an email. If you decide that you no longer want to receive the daily email, return to this screen and unselect the check box.	Highlight check box: 
Next, we'll revisit My Assessments. Recall that this is a list of all assessments you've created or edited for any case or referral that's ever been on your caseload, sorted by last update. We looked at the Status column earlier. Other columns include the updated date, ID, name, creation date, and type. You can sort the list by any of these columns.	Open **My Assessments**. Highlight each column. Sort by any column.
You have a few options for working with the information on this screen. • You can <u>search for a case/referral name</u> (this is an alphabetical search—you cannot search for a year or ID). • You can <u>filter the list by status</u>. For example, to see all assessments that I've submitted for approval that haven't been approved, I select Approval Submitted from the drop-down menu. The list refreshes with just those assessments. Clear the filter by clicking the **filter** icon ( ). • You can also <u>filter the list by date</u>. Click the **calendar** icon ( ) to see your options. You can choose from one of the preset timeframes or choose a custom range. Click the Apply button, and the list refreshes with just the assessments in that range. To clear the filter, click the **calendar** icon ( ) again and click Clear.	• Highlight search box. • Select **Approval Submitted**. Clear the filter. • Click the **calendar** icon ( ). Highlight and choose a **preset timeframe**. Click **Apply**. Click the **calendar** icon ( ) and click **Clear**.
My Assessments can also be a good place to perform some quick assessment actions, such as recalling or PDFing an assessment. These are done via the assessment action icon ( ), which we also saw earlier on the assessment tiles on the CAL and RAL.	Highlight the **assessment action** icon (but don't click yet).
Recall that WebSDM will display available actions for each assessment based on its status. When we looked at the available actions for the safety assessment earlier, all we could do was open or delete. But now that the assessment has been	Click the **assessment action** icon to show the options.

LANGUAGE	ACTION
submitted but not approved, we have a few more options. We can recall it to edit, open it as read-only, or PDF it.	
A quick note on PDFs: While you can PDF an assessment even before it has been approved, you should wait to upload the PDF to CWS/CMS (if your county does this) until the assessment has been approved.	
Now that you've seen all three "My" screens, you can think about which one will be most useful. Most people stay with My Caseload, but certain workers, especially Hotline workers who might not have a caseload, might find My Alerts or My Assessments a better choice.	
Q: Does anyone remember which icon in the User panel to use to change your home page? **A:** The user profile icon: To set a new home page, click that icon, open the drop-down menu under Home Screen, and choose whichever page you want. I'll choose My Assessments. Then, when I click the Home icon, it will load My Assessments. You can come back and change your home page as often as you like, which I'll do right now to set it back to My Caseload.	Click the **user profile** icon and demonstrate the drop-down menu. Select **My Assessments** and click the **user profile** icon () to close that pane. Then click **My Caseload** and open any referral or case. Click the **Home** icon. Reopen **User Profile** and select **My Caseload** from the drop-down menu.

MODULE 8: COMPLETING A REUNIFICATION ASSESSMENT AND ADDING CLIENTS

OBJECTIVES

Participants will:

- Practice completing a reunification assessment using an answer key;
- See how WebSDM responds to certain scenarios; and
- Know how to add or remove clients.

KEY POINTS

- The date and primary caregiver must be selected before the assessment can be saved.
- Warning icons alert users to required items.
- This assessment is especially dynamic—many sections and questions will be enabled or disabled based on user entry.
- Unlike referral assessments, where the household cannot be edited, case assessments provide more flexibility in who is included and assessed.

TRAINER NOTES

- As with the safety assessment, participants will use an answer key to complete the assessment.
- Because you will pause on occasion to demonstrate how WebSDM responds to certain user actions, please discourage participants from working ahead.
- The P&P training includes reunification assessments for both Tammy and Tom. Because Tom's case example allows for more of the assessment to be completed, this exercise assesses his household.
- You will cover the Clients section in detail, including adding clients. You will add Juan's "mother" (Luis is errantly listed as Juan's mother).

Note: This doesn't match the case example—it is for demonstration purposes only.

LEGEND

ICON	DESCRIPTION	MEANING
	Add client	See the client's relatives (per CWS/CMS) and add them to the assessment.
	Required	The assessment item must be completed.

ICON	DESCRIPTION	MEANING
?	Item definition	Click to access the item's definition as listed in the P&P manual.
⊘	Cannot select	Item cannot be selected: assessment is read-only, or the item does not apply.
Trees	Decision tree	Click to open the decision tree for the placement recommendation.

SCRIPT

LANGUAGE	ACTION
Please take out your answer key again. We'll use this to complete a reunification assessment for Joshua and Tom Baxter. Remember—our focus is on how to complete the assessment, not how to answer the questions.	
Q: Who can tell me the steps for starting an assessment for an existing case? **A:** My Caseload → Joshua Baxter's CAL → New Assessment panel → Reunification.	Click through the steps.
Assessment Header	
Just like the safety assessment, we enter basic information in the header. First, click the **calendar** icon (📅) to select the date. We'll choose today's date.	Click the **calendar** icon (📅) and select today's date.
Since we have to assess both of Joshua's households, we would have to complete two different assessments—one for Tom and one for Tammy. So we must specify which household we're assessing. Please go to the Household field and enter "Tom Baxter."	Enter "Tom Baxter" in the **Household Name** field.
Clients Section	
Certain assessments are completed during the referral and later during the case, such as the safety assessment and the risk assessment. The assessment items are generally similar, but there's a significant difference in how WebSDM displays the household. For referral assessments, the household is one entity. For case assessments, WebSDM lists clients separately. This gives you more control over who is assessed.	
In the Clients section, Joshua is the focus child, as noted by the Focus Child indicator in the Relationship column and the Child icon to the far left. We cannot remove him or assign anyone else as the focus child.	Highlight the **child** icon and **Focus Child** in the Relationship column.
However, we have more control over everyone else's inclusion and role. All other clients have a check box next to their names. If selected, they're included; if not, they're not. Only Tammy and Juan are currently selected. They're included because CWS/CMS has them recorded in the same household as Joshua. This will always be the case—everyone in the focus child's household will be included by default.	Highlight boxes.
This is a great example of how WebSDM, even though it's smart enough to list all clients related to Joshua, isn't smart enough to know which household you're assessing. Because we're not assessing Tammy's household, we need to remove her and Juan from the list.	
To do that, unselect the check boxes next to their names. Did you notice that the warning icons next to their names went away? This is because if someone is selected on this list, WebSDM requires us to assign them a role: primary caregiver, secondary caregiver, child, or "Other" (which covers partners, aunts, uncles, etc.).	Unselect Tammy and Juan. Highlight **role columns**.

LANGUAGE	ACTION
Because we are assessing Tom, we need to add him to the assessment. **Q:** What appeared when we selected Tom's box? **A:** The warning icon appeared. **Q:** What do we need to do? **A:** Assign Tom a role. He is the primary caregiver, so select "Primary."	Select Tom's **Assessed?** check box. Highlight **warning** icon. Select **Primary Caregiver**.
I'm going to demonstrate a couple of things for you. Please don't click along with me—you can just watch. First, you can only assign a client a role if the client is selected. Watch when I try to choose a role for Sheila—WebSDM won't let me because she's not included. Next, only one person can be the primary, and only one can be the secondary. I'm going to add Sheila, so now I have to assign her a role. I'm going to indicate that she is the primary caregiver. Watch what happens to Tom when I do.	Click on any role for Sheila. Add **Sheila**. Select **Primary Caregiver** for Sheila.
Q: What has changed? **A:** Tom no longer has a role. **Q:** Why does Tom have a warning icon? **A:** He no longer has an assigned role.	Highlight Tom's blank **roles** row. Highlight **warning** icon.
I'll demonstrate one more thing for you. First, I'll remove Sheila and assign Tom's role as "Other."	Unselect **Sheila**. Select **Other** for Tom's role.
WebSDM won't let me save this assessment as incomplete if I haven't chosen a primary caregiver. Watch what happens when I try. I get two pop-ups. The first is a heads-up on all incomplete items. Remember: That pop-up is just a warning—you can still save and close the assessment. However, the pop-up in the middle of the screen reminds us that we must select a primary caregiver before we can save and close.	Click **Save**. Highlight upper-right pop-up. Click **OK** to close middle pop-up.
For this next part, we'll all click together. First, I'll reassign Tom as the primary. Before we continue, please make sure your Clients section looks exactly like mine. Only Tom should be selected, and his role should be Primary.	Select **Primary** for Tom. **Pause** to ensure everyone's Clients section matches yours.
Notice the icon on the far right of every client's row. This is the **add client** icon ( ), which you can use to add extra clients to the assessment who aren't already included in the Clients list. <u>Disclaimer</u>: Before we start, let me emphasize that what we're about to do does not follow the answer key (or the case example). After this, we'll go back to the answer key.	Highlight **add client** icon ( ).
Let's say that Juan is in the household. Please add him and assign him as Other. Juan's father Luis is also living with them, so we want to include him in the assessment as well. As long as Luis is noted in CWS/CMS as Juan's relative, WebSDM will identify him as a potential additional client. To see whether he is, we click Juan's **add client** icon ( ).	Add **Juan**. Click **Other**. Click Juan's **add client** icon ( ).
This opens the Add Client screen, which displays all of Juan's relatives (per CWS/CMS). A check mark indicates that the client is already listed in the Clients section of the assessment.	Highlight the check marks.

LANGUAGE	ACTION
Because Luis isn't selected, we can add him to the assessment. Note how it says that Luis is Juan's mother. This is likely a data entry error, and it's a good example of how WebSDM can only display whatever is in CWS/CMS. So if something is wrong in CWS/CMS, such as birthdate, address, or client relationship, it'll be wrong in WebSDM as well. This can serve as a prompt to correct the information in CWS/CMS.	Highlight **Mother** in the **Relationship column**.
Please select Luis, and then click Add Clients.	Select **Luis**, then click **Add Clients**.
Now we're back in the assessment, and Luis is on the list, along with a warning icon to remind us to assign him a role. However, because we're just adding him as an example, you don't need to assign him a role.	Highlight **Luis** on the list.
Now that we've added Luis to the assessment, we can't delete him completely, but we can unselect him. Before we move on, please unselect Luis and Juan. Your screen should now look just like mine: Only Tom is selected, and his role is "primary caregiver."	Unselect **Luis** and **Juan**. Pause to ensure everyone's Clients section matches yours.
A. Reunification Risk Reassessment	
The first section is a quick three-question risk reassessment. Remember that we're assessing Tom's household, not Tammy's; so we'll answer these questions based on Tom and Joshua, not Tammy and Joshua.	
For question 1, please select "c" to indicate the risk level from the last risk assessment, which was High. Question 2 is "a," indicating no new substantiations.	• R1: **c**. • R2: **a**.
Notice on question 3 that there are two columns, labeled P and S. **Q:** Can anyone guess what P and S stand for? **A:** P = primary; S = secondary.	Highlight.
Try to select something in the Secondary column. WebSDM won't let us. **Q:** Can anyone tell me why the Secondary column is disabled? **A:** No one has been selected as the secondary caregiver. Please select "a" to indicate that Tom has made progress on his case plan objectives. Notice how the score for each item appears in the Score column as we select our responses.	Click a radio button in the **S** column. R3: **a**. Highlight **Score** column.
Risk Level and Overrides	
Once we finish these three questions, WebSDM calculates the risk level, which is Moderate. Next, we consider the overrides. None of the policy overrides apply, and nothing warrants a discretionary override, so we'll select No Override.	Highlight **Moderate**. Select **No Override**.

LANGUAGE	ACTION
I want to demonstrate something for you. Please don't click along with me—just watch. Notice that, as with the safety threats, we have to indicate that we considered each possible Policy Override item and select "No" if it does not apply. If I select Discretionary Override, I must choose a risk level, either one level up or one level down from the initial risk level. WebSDM won't let me choose "Moderate" since that was the original risk level. I can choose "Low" or "High," but not Very High, because that's two levels up. **Q:** Can anyone remember what the yellow text box indicates? **A:** WebSDM requires us to enter a reason for the discretionary override. I'll change my response back to No Override before we move on.	Click **Policy Override**. Click **Discretionary Override**. Highlight the disabled risk levels. Select **No Override**.
B. Visitation Plan Evaluation	
Now we must assess visitation between Joshua and Tom. Notice Joshua's name and the warning icon. This indicates that we haven't completed his visitation evaluation yet. Since he is the only child selected in the Clients section, we only see his name. If we had included his brother on the assessment as well, his name would be here, also with a warning icon.	Highlight **Joshua's name**.
For frequency, please select "Routinely." For Quality, please select "Strong" (but remember to consult the definitions when assessing these items). For Overrides, please select "No Override." Once we select these, WebSDM determines that compliance is acceptable. The check mark next to Joshua's name lets us know that we've completed his visitation evaluation. This will be more useful when you're assessing more than one child.	Select **Routinely**, **Strong**, and **No Override**. Highlight Joshua's check mark.
Note the Discretionary Override Reason box. As we've seen elsewhere, if we had chosen Discretionary Override, we would enter the reason here.	Highlight.
C. Reunification Safety Assessment	
If the risk level or the visitation were unsatisfactory, we wouldn't be required to complete this next part, the safety assessment. **Q:** Can anyone tell me why we wouldn't have to complete a safety assessment? **A:** We can't move forward with reunification unless the risk level is low or moderate and the visitation is acceptable. In our case, because risk and visitation are acceptable, we need to assess the household's safety.	
For question 1, we must enter supporting text no matter what our response. We will select "No." We need to list the initial threats and note how they've been resolved. Enter "Tom is sober and has a job and housing."	Q1: **No**. Enter "Tom is sober and has a job and housing."
Because we answered No, we're not required to answer the second part of question 1.	Click a radio button to show that it's disabled.
For question 2, I'll demonstrate what happens if I select "Yes." I would be required to describe the new safety threats and consider whether a safety intervention would keep the child safe.	Select **Yes** to enable the text box.
However, that doesn't apply for our case example, so we can select No. Once we do that, WebSDM determines the safety decision, which is Safe.	Select **No**. Highlight "Safe" safety decision.

LANGUAGE	ACTION
D. Placement/Permanency Plan Guidelines	
Now that we have assessed risk, visitation, and safety, we must note a few more things so WebSDM can determine the placement recommendation.	
When you attended Common Core training, you may have used a decision tree to make this decision. WebSDM does this for you behind the scenes, but if you want to see the steps, you can view the decision tree by clicking the tree icon. Let's try.	Click the **Trees** icon: 
The tree will open in a new tab. This is a link to this particular section of the online P&P manual that we looked at earlier. If necessary, you could navigate to any other part of the P&P manual from here.	Highlight.
Let's close the tab and return to the assessment. Please select "Under 3" for Age at Removal. Next, we'll select "6 months or before" for the hearing and "No override."	Close the tab. Select **Under 3**, select **6 months or before**, and select **No override**.
If we had selected Discretionary Override, we would be prompted to select a recommendation and enter supporting text. I'll demonstrate. I can't select Return Home, because that's the current recommendation.	Select **Discretionary Override**. Highlight choices and text box.
But because that doesn't follow our case example, I'll change my response back to No Override. **Q:** What happened when I clicked No Override? **A:** The assessment status changed to Complete. **Q:** Does anyone remember from the safety assessment why the Request Approval button isn't enabled yet? **A:** The status bar indicates "Changes Pending," so the assessment must be saved first.	Change back to **No Override**.
Before we finish, let's look at the last question. It doesn't apply for us because we only assessed one child, but if there were more and at least one child was under 3 and had a recommendation to terminate services, we could consider grouping the siblings and terminating services for everyone.	
This is a good opportunity to remind you how easy it is to access P&P information. If you need to review the definition for this or any other item on any assessment, click the **Help** icon.	Open help for Sibling Group. Close.
Let's finish the assessment by clicking SAVE. This enables the **Request Approval** button. We'll practice submitting an assessment one more time.	Click **SAVE**.
Click Request Approval, select any supervisor from the list, and click Request Approval. When we're returned to the assessment, our approval information is in the header, and the assessment is now read-only. **Q:** Who can remind us what to do if we need to edit the assessment? **A:** Recall the approval request, edit the assessment, and then resubmit.	Click **Request Approval**, select any supervisor, and click **Request Approval**.
And that's it. Please click Close to exit out of the assessment.	Click **Close**.

MODULE 9: COMPLETING ADDITIONAL ASSESSMENTS

OBJECTIVES

- Participants will gain more experience completing assessments using an answer key.
- Participants will know how to access the assessment completion guide in the document library.

KEY POINTS

- While the basics of completing assessments apply to all assessments, each one is unique.
- The assessment completion guide will be a valuable resource during and beyond the training.

TRAINER NOTES

- Participants can practice completing assessments on their own or in small groups using the answer key, or you can demonstrate completing assessments for the class.
- The answer keys are based on the case examples from the Common Core training.
- If you are short on time, the two best assessments to complete are the referral risk assessment (allowing you to demonstrate the referral assessment support panel) for front-end workers and the risk reassessment for back-end workers.
- If you need to conduct supervisor-specific training, this is the best time to do so. Ask the supervisors to convene, then cover the information in the supervisor module (Module 9B).

SCRIPT

LANGUAGE	ACTION
[If participant-led] For the remainder of the training, you will have a chance to practice completing other assessments using an answer key that is based on the case examples you used during your Common Core training. If you are a front-end worker, you will start with the referral risk assessment. If you are a back-end worker, you will start with the risk reassessment. You can work through the assessments on your own, or you can work with one or two other people.	
[If instructor-led] For the remainder of the training, we will practice completing other assessments together, using an answer key that is based on the case examples you used during your P&P training. We'll cover the referral risk assessment first as an example of a front-end assessment. Then we'll cover the risk reassessment as an example of a back-end assessment.	Note: Modify as needed based on participants' worker roles.

LANGUAGE	ACTION
Because this is a training site, you are free to select any item or try anything you would like. Any assessments you create or submit will be deleted, so you don’t have to worry about selecting the wrong item or submitting an assessment to a real person.	
Please open the document library to download the WebSDM assessment completion guide. This includes a basic outline of each assessment. This guide will be helpful as you get used to WebSDM.	

MODULE 9B: SUPERVISOR MODULE; MY ALERTS, MY UNIT, AND APPROVING ASSESSMENTS

OBJECTIVES

Participants will understand:

- The supervisor-specific elements of My Alerts;
- What actions are available from My Unit: approving requests and viewing their workers' caseloads and assessment lists;
- How to approve assessments;
- That once they approve an assessment, it cannot be recalled, edited, or redirected; and
- That they can choose My Unit as their home page.

KEY POINTS

- My Alerts for Supervisors contains an additional section for assessments that were submitted for approval in the last two days.
- My Unit provides a list of assessments awaiting approval.
- My Unit allows supervisors to view the caseloads of workers in their unit.
- Once assessments are approved, they can no longer be recalled, edited, or redirected.
- Supervisors can choose My Unit as their home page.

TRAINER NOTES

- This section allows you to demonstrate the supervisor-specific features of WebSDM. If you're teaching a class with workers and supervisors, you will pull aside supervisors to cover this information during Module 9 while workers practice completing assessments.
- 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.
- The training site does not currently contain the check box that allows supervisors to limit their approval list to only their supervised units.
- Before starting, you will log into WebSDM under one of the supervisor instructor accounts (either instructor101 or instructor102). Your password is still "training."

LEGEND

ICON	DESCRIPTION	MEANING
	Approve	Click to approve an assessment.
	Caseload	Click to access a worker's My Caseload screen.

SCRIPT

LANGUAGE	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 **My Alerts**. 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 select a check box to limit this list to just your supervised units.	Highlight.
Like the worker version, you can opt to receive an aggregate version of this screen in a daily summary email. You would select the box to opt in or unselect to opt out.	Highlight.
Next, before I cover My Unit, take a look at the Links panel. Notice the additional "My" link under the others we covered earlier. This is the My Unit link, which is only available for supervisors. The indicator next to the link lets you know how many assessments are awaiting approval.	Highlight the **My Unit** link and the **indicator**.
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. • You can sort this list by any column. • You can select a unit from the drop-down menu to filter the list to only assessments submitted by that unit. • You can search for a worker or a case/referral name. Note that this is an alphabetical search—you cannot search for a date or ID.	Highlight **page title**. Highlight each. **Sort** by any column. **Filter** by **Unit 1 in Office 1**. Highlight search field but do not demonstrate.
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 **Unit Staff**.  Highlight search box.
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	Click the **caseload** icon () for SDM Participant 1.

LANGUAGE	ACTION
To Do List. To return to the Unit Staff list, click your Internet browser's back button.	Click the back button.
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.	Open **User Profile** to show **My Unit** on the list. Do not select. Close.
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.	
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 read-only.	**Open** an assessment. Highlight the **Approve** button.
Before you begin your review, if you realize that the assessment was sent to your unit in error, you can redirect the approval request. **Q:** Who can tell me how to redirect an approval request? **A:** Click the Redirect Approval button, choose the new unit, and click Redirect Approval.	Click through the steps, but click **Close** instead of **Redirect Approval**.
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.	Highlight **Comments** field. Click **Approve**.
The assessment refreshes, and now we see the approval information in the assessment header. At this point, the assessment is officially read-only.	Highlight **Approval Status** in the header.
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.	Highlight. Click **Close**.
I've been redirected to my Approval Requests screen, and the assessment I just approved is now gone from the list. **Q:** Can anyone tell me where in WebSDM the worker who submitted this assessment would see it now? **A:** • My Assessments, with an Approved status; • My Alerts, in the Assessments Recently Approved section; or • RAL or CAL (also with an Approved status).	

MODULE 10: REVIEW AND WRAP-UP

OBJECTIVES

Participants will know where to find help within WebSDM.

KEY POINTS

- WebSDM has many resources to help users complete assessments and navigate the application.
- Users are encouraged to email the help desk with any questions that may arise once they start completing assessments.

TRAINER NOTES

- You can move through this quickly—just remind participants where to click.
- All resources available on the training site are also available on each county's WebSDM site.

SCRIPT

LANGUAGE	ACTION
Congratulations! Your training is complete, and you are now ready to start completing SDM assessments in WebSDM. You should receive login information from someone at the county. If you have any questions about logging in, see your supervisor for assistance.	Reopen the PowerPoint and show the Thank You & Questions slide.
Before you go, does anyone have any questions? [Pause for questions.] If not, I want to remind you of the resources available within WebSDM.	Move back to WebSDM.
First, you can access an interactive, searchable version of the P&P manual. The links along the side allow you to jump elsewhere in the manual easily. Also, remember that every assessment item has a definition pop-up that you can access while completing an assessment.	From any "My" screen, open the **P&P** link. Close the tab.
The document library contains links to various user manuals, quick reference cards, and more. I highly recommend downloading or printing the quick reference cards. They'll show you what every WebSDM icon means, what each screen does, and how to perform specific tasks.	Open the **Document Library**. Highlight the **Quick Reference section**.
The tutorials will also be helpful for a quick visual refresher on certain actions, like opening an incomplete assessment or requesting approval.	Open Tutorials, but do not launch any.

LANGUAGE	ACTION
Finally, remember that the WebSDM help desk is there to help you! Click the envelope icon, type your message (it can be technical about the website, or practice related, like how to think about using the definitions), and click "Send."	Open a message, then click **CANCEL**.