



Quick Steps

- Open the Case List Screen
- Click on the + Sign to the Left of the Case you are Working on
- Click on the Client Field you are Entering the Assessment for
- From the Right-Hand Menu Bar, Click on the Client Assessments/Screens Link
- Enter the Evaluation/Screening Information
- Click the Save/Go to Responses Button
- Enter the Appropriate Evaluation Responses
- Click the Close Button

Detailed Steps:

1. After logging into the database, your Staff Workpad window appears

6	Staff Workpad For: Team, Data (150155)		– – ×
Home		Case Related	*
	ation for:	Cases	
Team,	Data (150155)	Case Members	
	✓	Evaluations	
		Goals/Outcomes	
		Pregnancy	
		Service Plans	
		Referrals	
		Client Related	*
		Clients	
		Staff Related	*
		Tasks	
		Assignments	
		Services	
	Beports		Close

2. Click on the Cases link (on the side menu bar) to get to your open case list.





3. From the **Case List** screen, click on the **+** sign to the left of the case that you want to work on.



4. Under the case, click on the **client** you are entering the evaluation for.

Sean	ch Case List				/			c	ase Informatio	on Grid							Show Closed Cases Closed Members	<u></u>
a Ca	seld ⊽	Case Name		Currently Pregnant	Svc. Level	Svc. F	und	# Childrer	n Number fathers register		Open Di	t L	anguage	Healthy Start HV Prv. Id	CYFD HV Prv. Id	Last Audit	Case Related Addresses	* ^
8		Doe, Jane															Assignments	
- 1	5644601	Doe, Jane	150113	Yes							4/4/2022						Contacts	
•	DOB	Client	C'ent Id	Role	Role End		ASQ v/Risks		FIT/EI Referrals	Relation Screen		EPDS w/Risks	Screen	Peri-nat Last al Q Done	ASQ	ASQ/A	Tasks Evaluations/Screens	
2	1/1/2000	Doe, Jane	1564460	D1 M												×	Pregnancy	

5. On the right-hand menu bar, click on the **Evaluations/Screens** link.

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*

6. To add a new evaluation, click on the **Add** button.



7. The Evaluation/Screening Information form will open. Fill in the information for the Provider, Tool, Version, Eval Date, Rater, and Status.





		Evaluation/Screening Information								
Evaluation/Screening Information										
Name	Client: CYFD, Test (09009501), DOB: 6/14/1990									
Provider	090002 🔍	CYFD Training								
Tool	ED MCH 🗸 🔍	Federal Maternal-Child Health								
Version 🔳		Fed MCH FY19 - Mother								
Eval Date	3/2/2022 🗸									
Rater	H 🔍	Home visitor								
Status	C 🔍	Completed								
Notes										
You are add	ing a new item.	Next/Enter Responses								

- **Provider** This field is standardized and does not need to be changed. If blank, search for and add your program here.
- **Tool** Use the dropdown or magnifying glass tool to select the appropriate assessment, select, and click **OK**.
- Version Use the magnifying glass tool to locate the version of the screening tool you were using, select, and click **OK**.
- **Eval Date** Type in the date the evaluation was done or use the dropdown tool to access calendar.
- **Rater** Use the magnifying glass tool to identify the person who conducted the evaluation, select, and click **OK**.
- **Status** The database will default the status to C (Completed). Use the magnifying glass tool to select another option when necessary, select and click **OK**

When the Evaluation/Screening Information form is completed, click Next/Enter Responses.

- 8. The Evaluation/Screening Responses window will open. Enter responses to each question.
 - **Note:** Responses in an evaluation can be narrative, multiple choice, check all that apply, or numbers/dates. In the narrative/text responses, two boxes are presented to allow text input. The **Response Information** box is intended for notes that will be displayed in reports. The **Response Comments/Notes** box is intended or personal notes and will not be displayed in reports.
 - MCH After you completed the first FED MCH, the system will carry forward all the responses. So, every 3 months, when you create a new FED MCH, you will see all the responses populated from the previous FED MCH. All you need to do is make any





updates/changes as appropriate. It is IMPORTANT to remember to review and make changes to responses that need to be changed.

9. Click on the **Close** button after entering the responses. The information is saved automatically, and the evaluation is complete.

If you need further assistance, please contact the ECSC Data & Web Services Team: <u>ecscdata@unm.edu</u>