



## ASSESSMENT/INVESTIGATION SUPPLEMENTAL SHEET

Reviewed 08/14/09, Build 1.80.1

### **AI-1. View the Intake**

Task 1. View the Intake – P. 4

Step 6. Click the Intake ID for the Stone case – it's the intake with a decision time of 3:15 AM. The last four digits of the Intake ID are 8031.

### **AI-2. SACWIS Initiate an assessment/investigation and create a safety plan**

Task 2. Add Barney as a case member. – P. 10

Step 9. Identify his relationships. Barney is the biological son of Fred and Wilma. Barney is a half-brother to Rockette. He is the biological brother to Sandy. Complete all the relationships for Barney.

Task 4. Record the initiation of the assessment/investigation -- P. 12

Step 3. grid

Start Activity Date: 01/03/2005

End Activity Date: 01/03/2005

Intake ID: Select the intake with the last four digits of 8031

Task 5. Record the interview with Fred – P. 13

Step 2. grid

Start Activity Date: 01/03/2005

End Activity Date: 01/03/2005

Intake ID: Select the intake with the last four digits of 8031

Task 6. Record Wilma's interview in the activity log – P.15

Step 2. grid

Start Activity Date: 01/03/2005

End Activity Date: 01/03/2005

Intake ID: Select the intake with the last four digits of 8031

Task 7. Record the interview with Rockette – P. 17

Step 2. grid

Start Activity Date: 01/03/2005

End Activity Date: 01/03/2005

Intake ID: Select the intake with the last four digits of 8031

Task 8. Record Sandy's interview in the activity log – P. 19

Step 2. grid

Start Activity Date: 01/04/2005

End Activity Date: 01/04/2005

Intake ID: Select the intake with the last four digits of 8031

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Task 12. Record authorizations – P. 26

Step 8. grid

Reviewers/Approvers: Select **Weaver##, Sam** - system does **not** default to reviewer.**Step 9. skip this step****AI-4. Add case services**

Task 1. Add caseworker counseling – P. 36

Step 4. grid

Service Begin: Do **Not** record the begin date at this point. The service begin date cannot be recorded until a Provider has been linked to the Case Service.Complete **Steps 5 thru 11**After linking the Providers, record the **Service Begin date** (01/03/2005) in the appropriate field. Continue on with step 12.**AI-5. Record a Safety Assessment**

Task 1. Add a Safety Assessment – P. 42

Step 4. Select the Intake with a decision time of 3:15 AM. The last four digits of the Intake ID are 8031. Click Save. SACWIS returns to the Safety Assessment Details screen.**AI-6. Request Protective Supervision of the Children**

Task 6. Record the motion – P. 58

Step 1. Click **Search**Step 2. In the **Legal Action** field (near the bottom of the screen) select Record Motion

Step 3. Skip

Step 4. Skip

Continue with Step 5.

Task 7. View Rockette's legal action history – P. 60

Step 3. Click the link **Associated Legal Actions Beginning 02/01/2005 with a Complaint**. The system displays the complaint you just created. Click the link **Associated Legal Actions Beginning 02/01/2005 with a Motion**. The system displays the motion you just created. The links enable you to view details about each individual item.**AI-7. Record an upcoming hearing**

Task 1. Record the date and time of the hearing. – P. 62

Step 1. Click the **Case Legal Actions** link. The Legal Actions Search screen appears.Step 2. Click **Search**.Step 3. In the **Legal Action** field at the bottom of the screen, select Record Hearing.Step 4. Click **Add Action**. The Legal Actions Search Criteria screen appears.Step 5. Click **Continue**. The Hearing Information screen appears.

Step 6. Skip this step.

Continue the exercise with Step 7.



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### **AI-8, Discontinue the safety plan and record a family assessment**

Task 2. Add an assessment – P. 70

Add the following steps.

Step 3. In the Intake Information area: Click the **delete** link for the Intake ID with the last four digits of 7691.

Step 4. Click **0-K**.

Continue with Task 3.

Task-13, Generate and save the assessment/investigation checklist. – P. 87

Step 2. Click the **reports** link for the intake with the decision time of 3:15 AM. The last four digits of the Intake ID are 8031.

### **AI-9. Conclude the assessment/investigation**

Task 1. Generate and save the disposition letter to Fred. – P. 90

Step. 1. Click the **reports** link for the intake with the decision time of 3:15 AM. The last four digits of the Intake ID are 8031. The Available Documents screen appears.

Task 2. Generate and save the disposition letter to Wilma. P. 91

Step 1. Click the **reports** link for the intake with the decision time of 3:15 AM. The last four digits of the Intake ID are 8031. The Available Documents screen appears.

Task 4. Record sending the disposition letters to Fred and Wilma. P. 93

Step 3. **Grid**

Intake ID: Select the intake ID dated 1-3-05 with the last four digits of 8031.

### **AI-10. Conclude the assessment/investigation**

Task 1. View the original hearing – P. 96

Skip Steps 3, 4, and 5 as we will not be linking the ruling to the hearing.

Task 2. Record the ruling – P. 97

Step 1. Click **Search**, then in the **Legal Action** field (at the bottom of the screen), select Record Ruling.