

**California Automated Response and Engagement System (CWS-CARES)
Resource Family Application (RFA) Project**



Home Assessments

To be used with **Module 7: Home Assessments** Participant Guide

May 2022
Quick Guide 7
Version 6.0



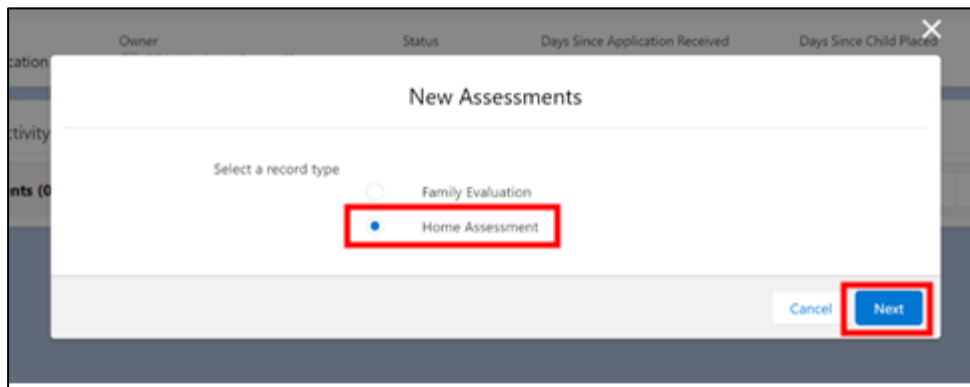
Revision History

Revision / Version #	Date of Release	Author	Summary of Changes
1.0		Lauren Gray	Initial draft
2.0	01/07/2022	Lauren Gray	Updated Draft
3.0	01/21/2022	Lori Savageau	ADA Compliance Check
4.0	02/15/2022	Melissa Smith	Revised ADA Compliance Check
5.0	2/24/2022	Lori Savageau	Final ADA Revision and Review
6.0	5/23/2022	Barney Smith	V.4 and V.5

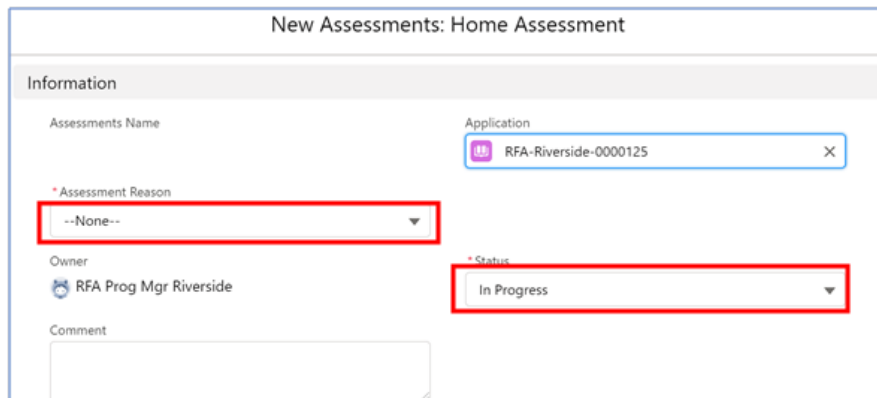
Home Assessments

To create the Home Assessment:

1. From the **Applications** page, click on **Assessments** tab. - The **Assessments** page displays.
2. Click **New**. - The **New Assessments** pop-up window displays.
3. Select the radio button for **Home Assessment**.
4. Click **Next**.



5. Click the **Assessment Reason** dropdown list and select the **most appropriate option**.
6. Click the **Status** field and from the dropdown list, select one of the following, as appropriate:
 1. Meets Standards
 2. Doesn't Meet Standards
 3. Follow Up Needed
 4. In Progress
7. In the **Comment** text box, type in *a summary of the home assessment you will be conducting or have completed*.





8. In the **Residence** section, enter the **Type of Residence**, **Number of Bedrooms**, and **Number of Bathrooms**.
9. In **CBO Information** enter if appropriate.
10. Enter **Tribal Affiliation** if appropriate.
11. In the bottom of the page, click the **Save** button. - The page refreshes with all the fields as readable.

NOTE:

- If the Home Assessment has not yet been completed, the **Residence** section is not mandatory and can be left blank to continue. If the Home Assessment has been completed, it will be required in order to save the pop-up window.

Residence			
Type of Residence	--None--		
Number of Bedrooms		Number of Bathrooms	

- The **CBO Information** section is where you would document whether a Community Based Organization was requested to complete the Home Assessment.

CBO Information			
CBO Name		CBO Referral Date	
		CBO Results Received Date	

- If the applicant or child/NMD has tribal affiliation, you must complete the **Tribal Affiliation** section.

Tribal Affiliation	
Tribal Attendance	No
Tribal POC Invitation Date	



To record an activity for the Home Assessment:

1. On the **Assessment** page, click the **Assessment Number** link you just created. – The **Assessment** page displays.

NOTE:

- The tabs on the **Assessments** page allow you to navigate around your Home Assessment.
 - **DAP** refers to a “Documented Alternative Plan”.
 - **Related** will refer you back to the application this assessment is related to.
 - **Documents** is where you will upload all documents and files related to the home assessment.
 - For all Home Assessments, you will also need to complete check list CFS 49 and upload it in the documents section
2. Click the **Activity** tab. – The **Activity** sub-tabs display.
 3. Click the **Log an Activity** sub-tab.
 4. Click **Add**. The **Log an Activity** sub-tab expands.
 5. Click the **Subject** field and from the dropdown list, select **Home Assessment**.
 6. Click the **Status** field and from the dropdown list, select **Completed**.
 7. Click the **Type** field and from the dropdown list, select **In Person**.
 8. In the **Completed** field, enter *the date the Home Assessment was conducted*.
 9. In the **Comments** field, enter *narrative about the interview*.
 10. In the **Name** field, search and enter *the family members’ names*.
 11. Leave the **Related To** field as is. It defaults to the application number of the application you are in.
 12. On the bottom right-hand corner of the page, click the **Save** button. – The **Log an Activity** tab contracts (all the fields disappear).
 13. At the top middle of the page, a green message box displays saying the activity was created.
 14. At the bottom of the page, in the section with today’s month and year, the activity you created displays.

NOTE: Remember, hold on to your Home Assessment notes. You will need to enter them separately on the written report before sending the application for approval.