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

Family Evaluations

To be used with **Module 8: Family Evaluations** Participant Guide

May 2022
Quick Guide 8
Version 6.0

Revision History

Revision / Version #	Date of Release	Author	Summary of Changes
1.0		Lauren Gray	Initial draft
2.0		Betty Hanna	Updated Draft
3.0	01/21/2022	Lori Savageau	ADA Compliance Check
4.0	02/14/2022	Melissa Smith	Revised ADA Compliance Check
5.0	05/23/2022	Barney Smith	V.4 and V.5
6.0	06/03/2022	Melissa Smith	Verified steps and added section on Completing An Initiated Family Evaluation

Family Evaluations

Initiating a Family Evaluation

1. From the **Application** page, click the **Assessments tab**. – The **Assessments** tab displays.
2. On the right-hand side of the tab, click the **New** button. – The **New Assessments** pop-up window displays.
3. The pop-up window defaults to the **Family Evaluation** radio button selected. Leave as is.
4. Click the **Next** button. – The **New Assessments: Family Evaluation** pop-up window displays.
5. Click the **Status** field and from drop-down list select the most appropriate option from the following:
   - **Completed**
   - **In Progress**

1) If you have already completed the Family Evaluation, you must indicate that all "voices" were heard in the interiew by selecting the checkboxes for:

   a. **1 interview at applicant home**

   b. **2 F2F interviews per applicant**

   c. **1 F2F interview per other adult/child**

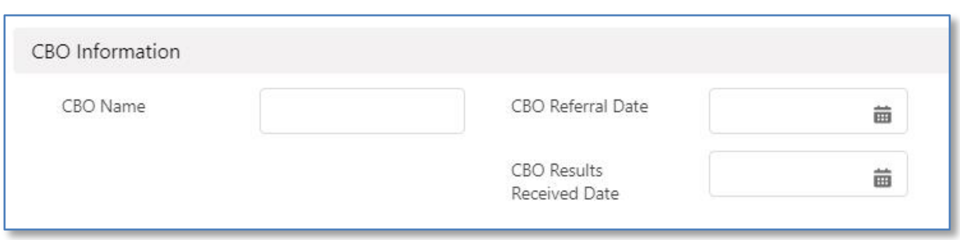
   NOTE:

   - All three checkboxes must be selected to save <u>a completed</u> Family Evaluation.
   - If you haven't yet completed the Family Evaluation, and are just initiating it, leave the checkboxes blank.

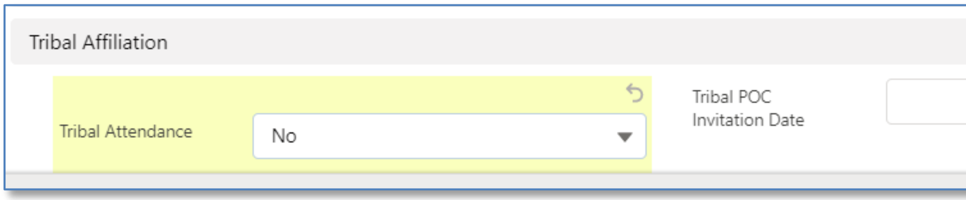
6. In the **Comments** field, *enter a narrative about the Family Evaluation you are about to have or have already completed.*
7. If needed, complete the **CBO Information** and/or the **Tribal Affiliation** sections.

NOTE:

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



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



8. Click **Save**. – The **New Assessments: Family Evaluation** pop-up window closes and the **Assessments** page displays.
9. At the top middle of the page, a green message box displays saying the assessment was saved and was given an assessment name (number).
10. At the top of the page, the **Family Evaluation** progress box will show:
    - **Not Started** – if you just initiated the assessment and had selected **In Progress** in the **Status** field
    - **Completed** – if you finished the assessment and had selected **Completed** in the **Status** field

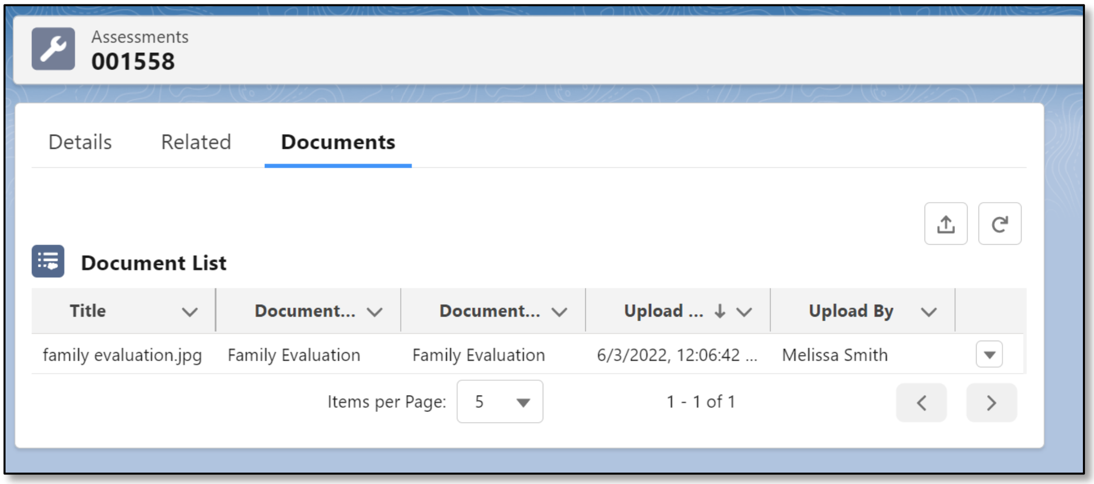
Completing an Initiated Family Evaluation

1. From the **Application** page, click the **Assessments tab**. – The **Assessments** tab displays.
2. Under the **Record Type** column, click the **Family Evaluation** link. – The **Assessments** page displays.

   NOTE: Clicking the **Assessment Name** (number) link will work as well.

3. Next to the **Status** field that displays **In Progress**, click the **edit** (pencil) icon. – All the fields on the page become enabled.
4. Click the **Status** field and from the dropdown list, select **Completed**.
5. Select the checkboxes for:
    a. **1 interview at applicant home**
    b. **2 F2F interviews per applicant**
    c. **1 F2F interview per other adult/child**
6. In the **Comments** field, *enter a narrative about the Family Evaluation you have completed.*
7. At the bottom of the page, click the **Save** button. – The page refreshes with the status of **Completed**.

NOTE: To view or upload any related documents to the Family Assessment, click the **Documents** sub-tab. Please see **Quick Guide 13 – Document Control** for more information on uploading documents into CARES.

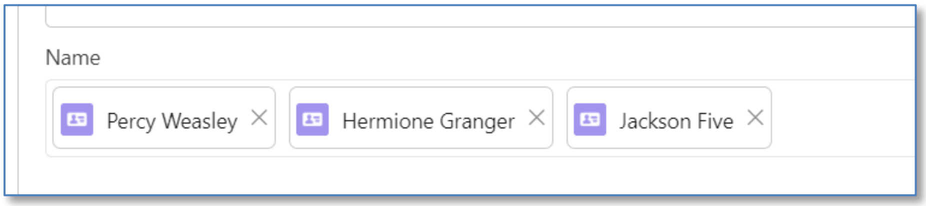


Recording the Family Evaluation Interviews

1. Beginning from the **Application** page, click the **Activity** tab. – The **Activity** tab display, defaulting to the **Log an Activity** sub-tab.
2. On the right-hand side of the sub-tab, click the **Add** button. - The **Log an Activity** sub-tab expands.
3. Click the **Subject** field and from the dropdown list, select **Family Evaluation.**
4. Leave the **Status** field to the default of **Completed**.
5. Click the **Type** field, and from the dropdown list, select the appropriate option for the following:
    a. **In Person**
    b. **Text Message**
    c. **Video Chat**
    d. **FAX**
    e. **Written Correspondence**
6. In the **Completed Date** field, *enter the date the interview(s) were completed*.
7. In the **Comments** field, enter *your narrative about the interview(s)*.
8. In the **Name** field, search and *enter the family member's name(s).*

NOTE:

- If all family members were interviewed at the same time, you can create one activity, listing all members in the **Name** field.



- If family members were interviewed on different days, or need separate narratives, you can create separate activities for each family member, as needed.

9. On the bottom right-hand corner of the page, click the **Save** button. – The **Log an Activity** tab contracts.
10. At the top center of the page, a green message box displayed, saying the activity was created.
11. Repeat steps above if creating separate activities for multiple family members.