

Family Resource Assessment

CREATING NEW FAMILY RESOURCE ASSESSMENT:

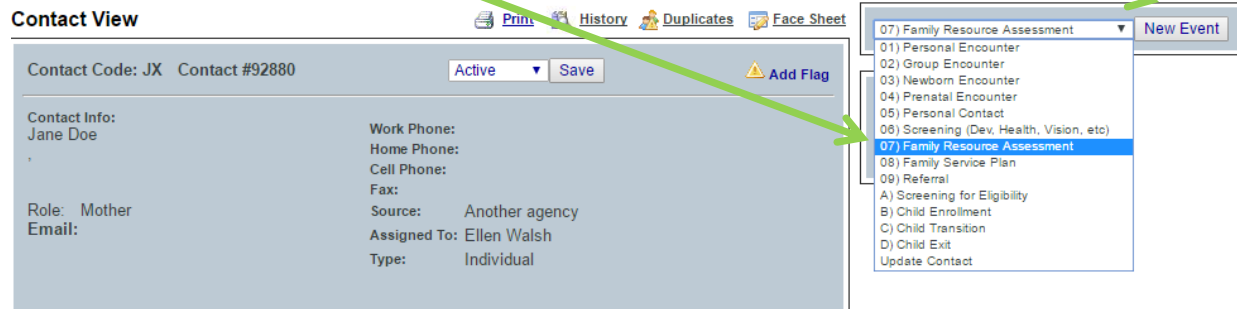
1

From within the contact view, go to the “New Event” dropdown menu.

Choose “Family Resource Assessment” from the list of events.

2

Click on “New Event”



The system will take you to this screen that tracks the general details for the event:

New Event Create Recurrence

Event:

Contact: Jane Doe (92880) Type: 07) Family Resource Assessment Edit

Date: 01/28/2020 Start Time: 2 00 PM End Time: 2 00 PM Minutes: 0 Remind me: 0 days before this event.

Description:

Assigned To: Nichole Kraft Admin

Status: Pending Open/Closed: Open Access: Public

Program

Division

Save Save & New Save & Close Cancel

Copy Contacts
 Copy Event

Note: Use the primary contact for this event.

Family Resource Assessment

3

Enter the following field values

Field	Value
Event	A short description. Not used for reporting. Does appear on the calendar view on the Event tab.
Date	Date on which the event is planned or the date on which happened (or was supposed to have happened)
Start time/End time	N/A – unless you tracked the specific time you spent on the FRA
Description	N/A – any notes you may have
Status	<p>Choose appropriate “Complete” or “Pending”. “Void” is only used to eliminate errors or duplication.</p> <div style="display: flex; align-items: flex-start;"> <div style="border: 1px solid #ccc; padding: 5px; margin-right: 10px;"> <p>Status:</p> <ul style="list-style-type: none"> Pending ▾ Cancelled by Client Cancelled by Staff Complete No Show <li style="background-color: #0070c0; color: white;">Pending Rescheduled Void </div> <div> <p><i>Note: “Pending” on any events set for future dates. “Complete” when an event occurred.</i></p> </div> </div>
Open/Closed	Open for all future events Closed for all other.
Division	“Home Visiting”
Program	Choose appropriate program.

4

Click <Save>

Family Resource Assessment

Event:

Contact: Jane Doe (92880) Edit

Type: 07) Family Resource Assessment ▼

Date: 06/17/2018 (mm/dd/yyyy)

Start Time: 1:00 PM ▼

End Time: 1:00 PM ▼

Minutes: 0

Remind me: 0 days before this event.

Description:

Assigned To: UserId More Staff

Status: Pending ▼

Open/Closed: Open ▼

Access: Public ▼

Program: Prevention Initiative ▼

Division: Home Visiting ▼

Available Forms/Surveys

FR A&M Mental/Educational/Careers	Create +	2/21/2018 - (Initial Active) ▼	Copy
Family Resource Assessment - Child	Create +	2/21/2018 - 14557 (Initial Active) ▼	Copy

Save
Save & New
Save & Close
Cancel

Copy Contacts
 Copy Event

5 After the initial <Save> is click you will see that you can open and <Create Family Resource Assessment> form. The 1st form is a “Family Related” assessment and the 2nd form is an individual “Child Growth & Development” goals assessment. **Note:** You will only create one family assessment form, and may create multiple child assessment forms, depending on how many children are enrolled in the program.

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FORM- FAMILY FRA (1 form for the entire family no matter how many children served):

FR A&M Mental/Educational/Careers

Event: 07 Family Resource Assessment (5/25/2017)
 Contact: Jane Doe (JX)
 Subject: _____
 Date: 05/25/2017
 Type: Initial

Comments: _____

Public: Locked Unlocked

Autosave

Page #1

MENTAL/EDUCATIONAL/CAREERS

High School/GED

0 - Does not desire
 1 - Already has
 2 - Desires
 3 - Beginning steps to achieve
 4 - Achieved fully

2. College Courses

0 - Does not desire
 1 - Already has
 2 - Desires
 3 - Beginning steps to achieve
 4 - Achieved fully

Subject and Type fields are helpful in identifying a form on the event display and also on the main Forms/Surveys tab.

These fields can also be used when copying future forms.

FORM- CHILD FRA (1 form for each child being served):

Family Resource Assessment - Child

Event: 07 Family Resource Assessment (6/17/2018)
 Contact: Jane Doe (JX)
 Subject: _____
 Date: 06/17/2018
 Type: N/A

Comments: _____

Public: Locked Unlocked

Autosave

Page #1

1. CHILD GROWTH AND DEVELOPMENT

*To be completed within 45 days after enrollment, ongoing every 6 months.

1. Child Name: (Required)

Jillian Doe
 Jillian Doe
 Jimmy Doe

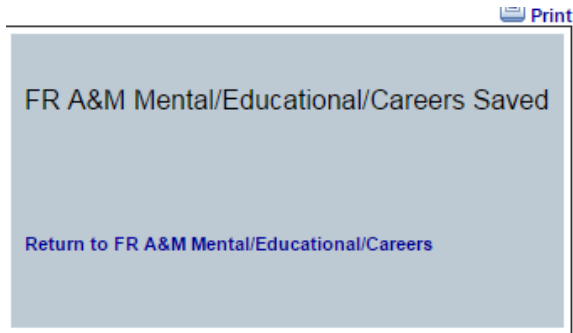
Initial assessment or evaluation

Finish & Save >>

9 <Save Changes> when complete or <Finish & Save>.

7 Choose <Autosave>

8 Fill in the form. You may navigate across the multiple pages here.



You are not able to navigate across multiple pages on the family form until all “required” selections are entered.

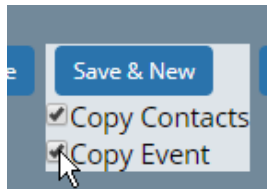
You may return to “Family Resource Assessment” form or “Child Growth and Development” form to edit, print the completed form, or close the tab and return to the event details and click <Save>.

Family Resource Assessment

COPYING FRA EVENT AND FAMILY FORM:

copying events and contacts is available on all events except 8) Family Service Goal Plan

Once you have finished an FRA event you may choose to set up the next event by clicking Copy Contacts and Event then <Save & New>.



Be sure to then edit the Event Name, Date, Status & Reminder for the system to notify you when the event is near.

The screenshot shows the event creation interface with the following fields and callouts:

- 1:** Event Name: 12 month FRA
- 2:** Date: 05/27/2019
- 3:** Status: Complete
- 4:** Remind me: 7 days before this event.

Other visible fields include: Contact (with Edit button), Type: 07) Family Resource Assessment, Start Time: 11:00 AM, End Time: 11:00 AM, Minutes: 0, Description, Assigned To: Userid, Additional Staff (Nichole Kraft, Complete, Hourly), and Access: Public.

At the time of the event you will open the Event, make any necessary edits and begin adding the Family FRA and Child forms.

You now have the option to “Create” or to “Copy” and choose from the drop down list of previous forms. On all future Family Resource Assessments for this primary caregiver, you will have an accumulated list of previous forms to copy. *remember to match form dates to event dates when creating any forms*

The screenshot shows the 'Available Forms/Surveys' section with the following details:

- Option to Create or Copy form:** A green highlighted header.
- Forms:**
 - FR A&M Mental/Educational/Careers (Create +)
 - Family Resource Assessment - Child (Create +)
- Dropdown List:**
 - 4/10/2018 - (Initial Active)
 - 4/10/2018 - (Initial Active)** (highlighted with callout 1)
 - 5/27/2019 - Family (6mnth Active)
- Copy Button:** A blue button with a copy icon, highlighted with callout 2.