

Family Resource Assessment

- 1 From within the contact view, go to the "New Event" Dropdown menu. Choose "07) Family Resource Assessment" from the list of events.
- 2 Click on "New Event"

Contact View

Contact Code: JX Contact #92880 Active Save Add Flag

Contact Info: Jane Doe
 Work Phone:
 Home Phone:
 Cell Phone:
 Fax:
 Role: Mother
 Email:
 Source: Another agency
 Assigned To: Ellen Walsh
 Type: Individual

07) Family Resource Assessment
 01) Personal Encounter
 02) Group Encounter
 03) Newborn Encounter
 04) Prenatal Encounter
 05) Personal Contact
 06) Screening (Dev. Health, Vision, etc)
07) Family Resource Assessment
 08) Family Service Plan
 09) Referral
 A) Screening for Eligibility
 B) Child Enrollment
 C) Child Transition
 D) Child Exit
 Update Contact

New Event

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

Create Recurrence

Event:

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

Date: 05/25/2017 (mm/dd/yyyy) Start Time: 3:00 PM End Time: 3:00 PM

Remind me: 0 days before this event. Minutes: 0

Description:

Assigned To: UserId

Notify me if not closed in: days

Status: Pending Open/Closed: Open Access: Public

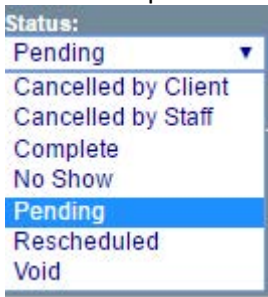
Division: Program:

Save Save & New Save & Close Cancel

Copy Contacts Copy 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	Choose appropriate complete or pending. Void is only used to eliminate errors or duplication. 
Open/Closed	Open for all future events Closed for all other. Note: If an event is closed, you will be unable to make changes to the associated contacts and staff. If you need to make corrections, set the status to “open”, <save>, make changes, and re-set to “closed” and <save> again
Division	“Home Visiting”
Program	Choose appropriate program for your agency

4 Click <Save>

Family Resource Assessment

5

You will see that you can open and create a Family Resource Assessment form. The 1st form is a family related assessment and the 2nd form is an individual Child Growth & Development goals assessment. 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.

Family Resource Assessment

FAMILY FRA

FR A&M Mental/Educational/Careers

IMPORTANT: Please click the Save Changes button below to save your entries before closing this window. You can return to complete the form later.

Save Changes

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

Comments

Page #1

1 2 3 4 5 6 7

1. MENTAL/EDUCATIONAL/CAREERS

1. 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

CHILD FRA

Family Resource Assessment - Child

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

Comments

Print

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
 Jimmy Doe
 Initial assessment or evaluation

Finish & Save >>

6 Choose <Autosave>

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

7

8 <Save changes> when complete

Family Resource Assessment

 Print

FR A&M Mental/Educational/Careers Saved

[Return to FR A&M Mental/Educational/Careers](#)

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 <save>