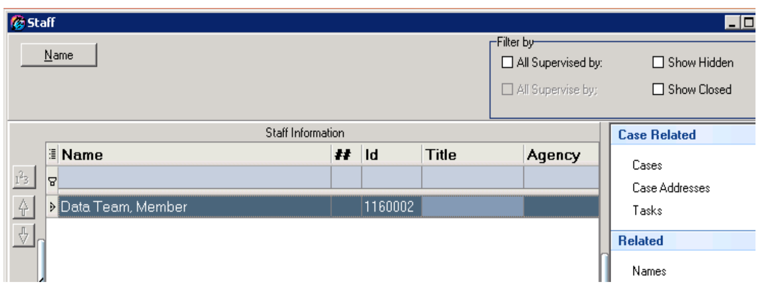
Entering Assessments for Clients

Quick Steps

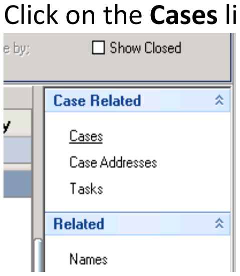
- Open the Case List Screen (if you are not already in it)
- Click on the + Sign to the Left of the Case you are Working on
- Click on the Client Field you are Entering the Assessment for
- From the Right Hand Menu Bar, Click on the Client Assessments/Screens Link
- Enter the Evaluation/Screening Information
- Click the Save/Go to Responses Button
- Enter the Appropriate Evaluation Responses
- Click the Close Button

Detailed Steps:

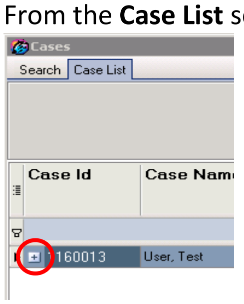
1. After logging into the database, the Staff window appears and the system identifies your name on the staff list.



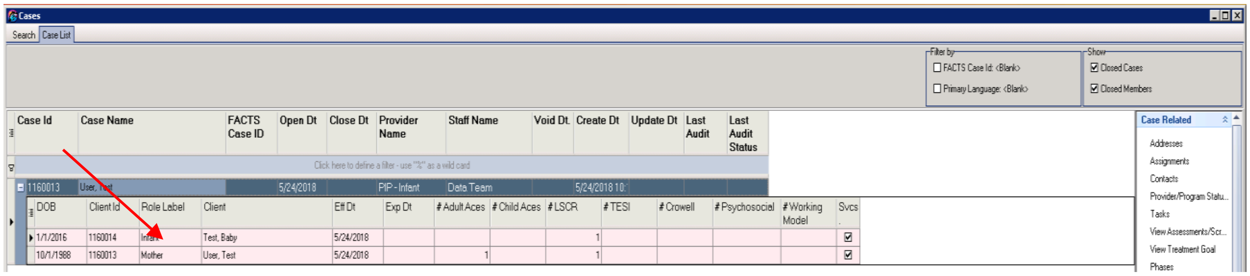
2. Click on the **Cases** link (on the side menu bar) to get to your open case list.



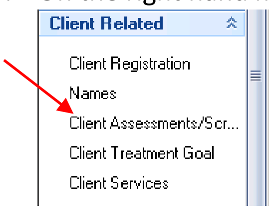
3. From the **Case List** screen, click on the **+** sign to the left of the case that you want to work on.



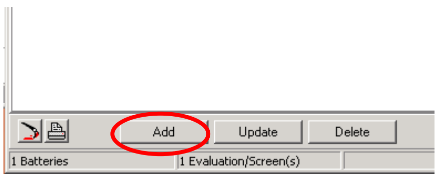
4. Under the case, click on the client you are entering the assessment for.



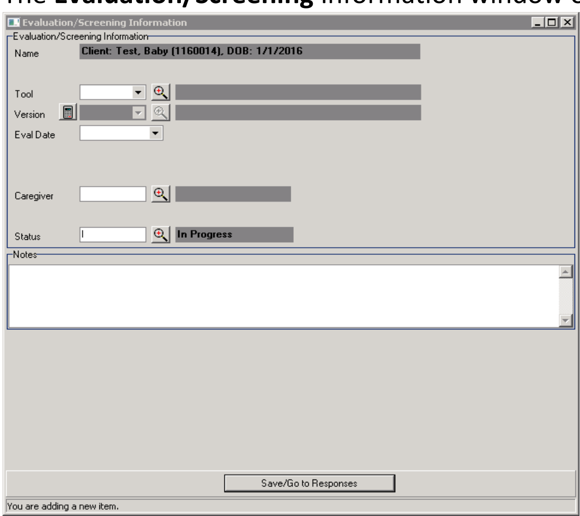
5. On the right hand menu bar, click on the **Client Assessments/Screens** link.



6. Click the **Add** button to add a new assessment.



7. The **Evaluation/Screening** Information window opens.



Tool	Use the dropdown to identify the name of the evaluation or screening you are entering the data for.
Version	Use the dropdown to locate the version of the screening tool you are using.
Eval Date	Type in the date the evaluation was conducted or use the dropdown calendar.
Caregiver	Type in the last name of the caregiver and click the magnifying glass to identify the caregiver the evaluation is tied to.
Status	This option will be automatically defaulted to **In Progress**. To change this status, click the magnifying glass, select the new status and click **Ok**.

8. When the Evaluation/Screening Information form is complete, click the **Save/Go to Responses** button, and the assessment questions will appear.

   Each question and response will follow your documentation of this screening.

   Note: Responses in an evaluation can be narrative, multiple choice, check all that apply, or numbers/dates. In the narrative/text responses, two boxes are presented to allow text input. The **Response Information** box is intended for notes that will be displayed in reports. The **Response Comments/Notes** box is intended or personal notes and will not be displayed in reports.

9. Click on the **Close** button after entering the responses. The information is saved automatically and the assessment is complete.

If you need further assistance please contact the ECSC Database Services Team:

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