

Initial Assessment Quick Reference Guide

Definition

The initial assessment records the person's safety, accommodation and support needs, and the response and actions required to enable them to get the service that best meets their needs.

Context

The initial assessment may take place face-to-face or over the phone. The practitioner may choose to record the information on the initial assessment form and re-enter this information into CIMS later (within 24 hours). Alternatively, this information may be entered directly into the CIMS during the initial assessment.

This quick reference guide covers the following steps for using the Initial Assessment functionality in CIMS.

1. Create an Initial Assessment
2. Enter an Accompanying Person attachment
3. End an Initial Assessment
4. Copy an Initial Assessment (for re-assessment)

1. Create an Initial Assessment

Search	Details	Consent	Assessments	Notes	Payments	Accommodation	Status	Alerts	Re
									Create New View Prior
Current Records									
Profile Type ↑	Workgroup	Start	Last Updated						
Initial Assessment		21/11/2014	28/11/2014						
1 to 1 of 1									
Prior Records									
Profile Type ↑	Workgroup	Start	End						
Initial Assessment		20/11/2014	20/11/2014						
1 to 1 of 1									

1. Create an Initial Assessment

The Assessments tab in the person page displays a person's current Initial Assessment and any prior Initial Assessments

- Click the **Assessments** Tab of a person record.
- Click the **Create New** button to begin recording an Initial Assessment.
 - The Initial Assessment form will open. An error message will be displayed if a current Initial assessment already exists. You need to set an expiry date on any current assessment.
- For ease of use, the click the blue circle with an arrow. **Initial Assessment**
- The Initial Assessment form is divided into following sections:

Identify

Act

Within each section there are a number of tabs where assessment information is recorded. The dark blue section is highlighted when it is the active section and only the tabs for that section will be visible.

The Identify section has the following Tabs

Admin

Safety

Accommodation

Support

Restrictions

The Act section has the following Tabs

Response

Outcome

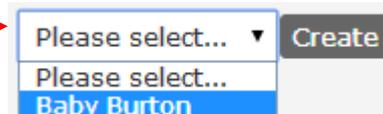
To move to a different section click on that section
 To move to a different tab within a section click on that tab.

2. Enter an Accompanying person attachment

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Children may be added to an Initial Assessment by selecting the **Accompanying Person** attachment within the Admin tab. Note: The child, and their relationship to the adult who has received an initial assessment, must first be created.

- Clicking the **+** icon opens a form which displays a selection list of relationships for the person who is the head of the presenting unit (PUH). (A message is displayed if a relationship exists which has not had an attachment created)
- From the list select the person you wish to create an attachment for and then click the **Create** button. An accompanying person attachment form is displayed.
- Once you have completed entering information in each field click the **Save** button to the attachment against the Initial Assessment.
- Once saved the name of the accompanying person and date will be visible in the **Accompanying Persons Attachments** field.
- When reviewing clicking a highlighted name **Baby Burton** the Accompanying person form will display.


3. End an Initial Assessment

When the expiry date for an Initial Assessment is reached it is moved from the Current Records to the Prior Records in the Assessments tab.

- On the Admin tab of the Identify section enter an expiry date or select a date from the calendar by clicking the  icon.



4. Copy an Initial Assessment (for re-assessment)

1. Copy an initial assessment

An initial assessment can be copied and used as a template for another assessment for the same person.

- Enter the most recent Initial Assessment form for the client
- On any tab within the Identify or Act sections of an initial assessment click copy  to select all fields contained in an assessment.

Search Details Consent **Assessments** Notes Payments Accommodation Status Alerts Re

Current Records

Profile Type ↑	Workgroup	Start	Last Updated
No record to display			

2. Paste information into a new initial assessment

Having copied the contents of an assessment it is now possible to paste this information into a new assessment form.

It is not possible to paste the copied initial assessment if the person has an open initial assessment in Current Records

- Select the person you wish to use the copied information as a template
- On the Person Assessments tab the  button will appear if the person has no current Initial Assessment.
- Clicking the  button will create a new Initial Assessment with all the information copied into fields.
- The information should now be updated for a re-assessment.

Legend

- The  icon extends the complete list of options available. It is possible to expand and collapse visibility of the selection options for a field. When a lower level option is selected the selection remains visible.
- The  icon expands to display a text box. This may be expanded and collapsed.
-  Radio buttons (Circles) allow only one option to be selected
-  Check boxes (Squares) allow multiple options to be selected.
- The  icon displays a PDF version of the Initial Assessment.