

Creating a Large Family Assessment



KNOWLEDGE BASE ARTICLE

Creating a Large Family Assessment

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Creating a Large Family Assessment

Overview

This article demonstrates how to create a Large Family Assessment record.

In order for a user to have the ability to add a Large Family Assessment, an agency's Provider Type must be either "Adoptive Care" or "Adoptive Care-1692." Additionally, the user must have security permissions of Home Study Assessor, or Home Study Supervisor, and have assignment to the Provider record. If the user is the supervisor of the assigned worker, it is not necessary for the supervisor to be assigned to the Provider in order to add a Large Family assessment.

From the SACWIS Home Page:

1. Click the **Provider** tab
2. Click, **Workload**

The **Workload** screen appears, displaying a list of **Provider Workers**.

3. Click the **plus sign** beside the name of the appropriate individual.



A list of cases for the selected individual appears.

4. Click the **select** hyperlink in the appropriate row.

The screenshot shows the 'Workload' screen with a list of cases for a selected individual. The 'select' hyperlink in the first row is circled in red.

Provider ID	Provider Name	Provider Status	Provider Type	Type Status	Primary Address
		Active	Kinship Care - Relative	Approved	
		Active	Kinship Care - Relative	Application Received	
		Active	Kinship Care - Relative	Approved	

Creating a Large Family Assessment

The **Provider Overview** screen appears.

5. Click, **Large Family Assessment** in the left column.

The screenshot shows the 'Provider Overview' screen. On the left, a navigation menu is visible with 'Large Family Assessment' circled in red. The main content area includes fields for 'PROVIDER NAME / ID', 'CATEGORY / STATUS: Home / Active', 'PRIMARY ADDRESS', and 'PRIMARY CONTACT'. Below these are sections for 'Provider Actions' and 'Foster/Adoptive Spans'. A table lists the following data:

Provider Type	Level of Care	Approval/Certification Period	Agency	Certifying Entity
Foster Care	Family Foster Home			ODJFS

The **Large Family Assessment History** screen appears.

6. Click, **Add Large Family Assessment**.

The screenshot shows the 'Large Family Assessment History' screen. A blue header bar contains the text 'Large Family Assessment History'. Below this, a message reads 'No Large Family Assessments exist for this Provider.' A button labeled 'Add Large Family Assessment' is circled in red.

The **Large Family Assessment Information** screen appears.

1. Make a selection from the **Assessor** drop-down menu.
2. If appropriate, place a checkmark in the relevant box(es) regarding the family situation.
3. Click, **Family Information**.

The screenshot shows the 'Large Family Assessment Information' screen. The 'Assessor' dropdown menu is circled in red. Below it, three checkboxes are visible, with the first one checked. At the bottom, a 'Family Information' button is circled in red.

Provider / Workload / Large Family Assessment **Large Family Assessment Information**

PROVIDER NAME / ID: [redacted] CATEGORY: Home

Large Family Assessment Information

Assessor: * [dropdown menu] Agency: [redacted]

The family is not approved to adopt children with special needs at this time.
 None of the children currently residing in the home have special needs.
 The family is not planning to adopt a specific child at this time.

Large Family Assessment Topics

Topic	Status
Family Information	Children Residing in the Home: 0 of 4 Child(ren) Completed

Creating a Large Family Assessment

The **Family Information Details** screen appears, displaying the Adoptive applicant(s) name and address in the **Adoptive Parent Information** grid.

In the **Children Residing in the Home** grid:

1. Make a selection from the **Status** drop-down menu beside the name of each child.

Important: It may be necessary to *add* the name of a child who is residing in the home. If you need to add this information, please proceed to the **Adding a Child** section below.

2. Click, **Save**.

Provider / Workload / Large Family Assessment **Family Information Details**

Your data has been saved.

PROVIDER NAME / ID: [Redacted] CATEGORY: *Home*

Adoptive Parent information

Adoptive Parent 1: [Redacted]
Adoptive Parent 2: [Redacted]
Address: [Redacted]

Children Residing in the Home

[Redacted] Status: Biological

Add Child Person Search

Children Not Residing in the Home

Expand all >

Person Search

Apply **Save** Cancel

The **Large Family Assessment Information** screen appears, indicating the status of each child residing in the home is complete.

Note: If there are no other children residing in the home that need to be added to the record, please proceed to the **Adding Family Motivation Information** section below.

Provider / Workload / Large Family Assessment **Large Family Assessment Information**

Your data has been saved.

PROVIDER NAME / ID: [Redacted] CATEGORY: *Home*

Large Family Assessment Topics

Topic	Status
Family Information	Children Residing in the Home: 6 of 6 Child(ren) Completed

Creating a Large Family Assessment

Adding a Child

From the **Family Information Details** screen:

1. Click, **Person Search (Children Residing in the Home grid)**.

The screenshot shows the 'Family Information Details' screen. At the top, there are tabs for 'Provider / Workload / Large Family Assessment' and 'Family Information Details'. Below this is a header bar with 'PROVIDER NAME / ID' and 'CATEGORY: Home'. The main content area is titled 'Children Residing in the Home' and contains a grid with two rows. Each row has a 'Status:' dropdown menu and a trash icon. At the bottom of the grid, there are two buttons: 'Add Child' and 'Person Search', with the 'Person Search' button circled in red.

The **Person Search Criteria** screen appears.

1. Fill in the search parameters.
2. Click, **Search**.

The screenshot shows the 'Person Search Criteria' screen. It features several input fields: 'Prefix', 'Last Name', 'First Name', 'Suffix', 'Middle Name', 'DOB', 'From Age', 'To Age', 'Gender', 'Race', and 'Hispanic/Latino'. There are also checkboxes for 'AKA' and 'Sounds Like'. A hint text reads: '[HINT: AKA / 'Sounds Like' applies to last/first/middle name only. Wildcard (%) search & 'Sounds Like' cannot be used together.]'. At the bottom, there is a 'Sort Results By:' dropdown menu set to 'Last Name Ascending'. At the very bottom, there are three buttons: 'Search', 'Clear Form', and 'Return', with the 'Search' button circled in red.

The **Person Search Results** grid appears, displaying search results.

1. Click, **select**, beside the appropriate child's name.

The screenshot shows the 'Person Search Results' grid. It displays a table with the following columns: 'Person ID', 'Name', 'Street', 'City', 'State/Zip', 'Gender', 'Age', 'DOB', and 'Active Case'. The table contains two rows of data, both of which are redacted with a light blue background. The 'Active Case' column shows 'Yes' for both rows. The 'select' button in the first row is circled in red.

Creating a Large Family Assessment

The **Family Information Details** screen appears, displaying the name of the added child.

Provider / Workload / Large Family Assessment **Family Information Details**

PROVIDER NAME / ID: [Redacted] CATEGORY: *Home*

Adoptive Parent Information

Adoptive Parent 1: [Redacted]
Adoptive Parent 2: [Redacted]
Address: [Redacted]

Children Residing in the Home

[Redacted]	Status: [Dropdown]	[Trash]

Children not Residing in the Home

It may also be necessary to add a child to the record who is not residing in the home.

On the **Family Information Details** screen:

1. Click, **Person Search (Children Not Residing in the Home grid)**.

Provider / Workload / Large Family Assessment **Family Information Details**

PROVIDER NAME / ID: [Redacted] CATEGORY: *Home*

Children Not Residing in the Home

[Expand all >](#)

Person Search

The **Person Search Criteria** screen appears.

1. Enter search parameters.
2. Click, **Search**.

Person Search Criteria

Prefix: [Dropdown]

Last Name: [Text Box]

First Name: [Text Box]

Suffix: [Dropdown]

AKA Sounds Like

[HINT: AKA / 'Sounds Like' applies to lastfirst/middle name only. Wildcard (%) search & 'Sounds Like' cannot be used together.]

Creating a Large Family Assessment

The results appear in the **Person Search Results** grid.

3. Click, **select**, beside the appropriate child's name.

Person ID	Name	Street	City	State/Zip	Gender	Age	DOB	Active Case
select								
select								

The **Family Information Details** screen appears, displaying the name of the child (**Children Not Residing in the Home**) grid.

4. Make a selection from the **Status** drop-down menu.
5. Click, **Save**.

Provider / Workload / Large Family Assessment **Family Information Details**

PROVIDER NAME / ID: [redacted] CATEGORY: Home

Children Not Residing in the Home

Expand all >

Status: [dropdown menu]

Apply Save Cancel

Important: Navigate to the **Large Family Assessment Information** screen using steps previously discussed.

Adding Family Motivation Information

On the **Large Family Assessment Information** screen:

1. Click, **Family Motivation**.

Provider / Workload / Large Family Assessment **Large Family Assessment Information**

PROVIDER NAME / ID: [redacted] CATEGORY: Home

Large Family Assessment Topics

Topic	Status
Family Information	Children Residing in the Home: 6 of 6 Child(ren) Completed Children Not Residing in the Home: 0 of 0 Child(ren) Completed
Family Motivation	0 of 1 Answer(s) Provided

Creating a Large Family Assessment

The **Large Family Assessment Information** screen appears, indicating the **Family Motivation** section is complete.

6. Click, **Special Needs**.

Provider / Workload / Large Family Assessment **Large Family Assessment Information**

PROVIDER NAME / ID: [] CATEGORY: *Home*

Large Family Assessment Information

Large Family Assessment Topics

Topic	Status
Family Information <i>Note: Additional child(ren) are available for selection.</i>	Children Residing in the Home: 4 of 4 Child(ren) Completed
Family Motivation	Children Not Residing in the Home: 1 of 1 Child(ren) Completed 1 of 1 Answer(s) Provided
Special Needs	0 of 4 Answer(s) Provided

The **Special Needs Details** screen appears.

Adding Special Needs Information

1. Click the **edit** hyperlink in the top row.

Provider / Workload / Large Family Assessment **Special Needs Details**

Your data has been saved.

PROVIDER NAME / ID: [] CATEGORY: *Home*

Special Needs

	Question	Answer
edit	Summarize all the special needs of the prospective adoptive child(ren)...	XXXXXXXXXXXXXXXXXXXXXXXX
edit	Identify all the special needs of all children currently residing in the ho...	XXXXXXXXXXXXXXXXXXXXXXXX
edit	Describe how the prospective adoptive family meets the special needs of eac...	XXXXXXXXXXXXXXXXXXXXXXXX
edit	Describe the prospective adoptive family's training and/or experience paren...	XXXXXXXXXXXXXXXXXXXXXXXX

[Close](#)

Creating a Large Family Assessment

The **Narrative Details** screen appears.

2. Complete the Narrative.
3. Click **Next** to proceed to the next, and each subsequent, narrative.
4. Click **Save** when finished with the last narrative.

Provider / Workload / Large Family Assessment **Narrative Details**

PROVIDER NAME / ID CATEGORY: Home

Special Needs Narrative

Summarize all the special needs of the prospective adoptive child(ren).
• If there is no specific child to be adopted at this time, then base the assessment on the characteristics the family is approved to adopt.

([expand full screen](#))

ABC

Previous **Next** Apply **Save** Cancel

The **Special Needs Details** screen appears.

5. Click, **Close**.

Provider / Workload / Large Family Assessment **Special Needs Details**

Your data has been saved. x

Close

Note: There will be questions that require a response in the **Special Needs** section, even if you have previously selected, **None of the children currently residing in the home have special needs.**

The **Large Family Assessment Information** screen appears, indicating the **Special Needs** section is complete.

1. Click, **Resources and Supports.**

Creating a Large Family Assessment

Provider / Workload / Large Family Assessment **Large Family Assessment Information**

PROVIDER NAME / ID: [] CATEGORY: Home

Large Family Assessment Information

Assessor: * [] Agency: []

The family is not approved to adopt children with special needs at this time.
 None of the children currently residing in the home have special needs.
 The family is not planning to adopt a specific child at this time.

Large Family Assessment Topics

Topic	Status
Family Information	Children Residing in the Home: 2 of 2 Child(ren) Completed Children Not Residing in the Home: 0 of 0 Child(ren) Completed
Family Motivation	1 of 1 Answer(s) Provided
Special Needs	4 of 4 Answer(s) Provided
Resources and Supports	4 of 4 Answer(s) Provided

The **Resources and Supports Details** screen appears.

2. Click the **edit** hyperlink in the top row.

Provider / Workload / Large Family Assessment **Resources and Supports Details**

✔ Your data has been saved.

PROVIDER NAME / ID: [] CATEGORY: Home

Resources and Supports

Question	Answer
edit Summarize the community resources available to the prospective adoptive fam...	
edit Summarize the prospective adoptive family's support system and give example...	
edit Financial Stability	
edit Additional training needs	

The **Narrative Details** screen appears.

3. Complete the narrative.
4. Click **Next** to proceed to the next, and each subsequent, narrative.
5. Click **Save** when finished with the last narrative.

The **Resources and Supports Details** screen appears.

6. Click, **Close**.

Provider / Workload / Large Family Assessment **Resources and Supports Details**

✔ Your data has been saved.

[Close](#)

Creating a Large Family Assessment

The **Large Family Assessment Information** screen appears, indicating the **Opinions of Other Children, Adults and Service Providers** answers are complete.

6. Click, **Family System**.

Provider / Workload / Large Family Assessment **Large Family Assessment Information**

PROVIDER NAME / ID: [redacted] CATEGORY: *Home*

Large Family Assessment Topics

Topic	Status
Family Information	Children Residing in the Home: 3 of 3 Child(ren) Completed Children Not Residing in the Home: 0 of 0 Child(ren) Completed
Family Motivation	1 of 1 Answer(s) Provided
Special Needs	4 of 4 Answer(s) Provided
Resources and Supports	4 of 4 Answer(s) Provided
Opinions of other children, adults and service providers	4 of 4 Answer(s) Provided
Family System	0 of 3 Answer(s) Provided

The **Family System Details** screen appears.

Adding Family System Information

1. Click the **edit** hyperlink in the top row.

Provider / Workload / Large Family Assessment **Family System Details**

Your data has been saved.

PROVIDER NAME / ID: [redacted] CATEGORY: *Home*

Family System

Question	Answer
edit Describe the prospective adoptive family's current organization of the fami...	
edit How will an additional child (or children) impact the prospective adoptive ...	
edit Describe the prospective adoptive family's plan in the case of death, illne...	

The **Narrative Details** screen appears.

2. Complete the narrative.
3. Click **Next** to proceed to the next, and each subsequent, narrative.
4. Click **Save** when finished with the last narrative.

Provider / Workload / Large Family Assessment **Narrative Details**

PROVIDER NAME / ID: [redacted] CATEGORY: *Home*

Family System Narrative

Describe the prospective adoptive family's current organization of the family system.

- Include time management, flexibility, keeping appointments, who is available to the children during the day, transportation, and supervision, etc.

(expand full screen)

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The **Family System Details** screen appears.

5. Click, **Close**.

Provider / Workload / Large Family Assessment **Family System Details**

Your data has been saved.

PROVIDER NAME / ID: CATEGORY: *Home*

Family System

Question	Answer
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Close

The **Large Family Assessment Information** screen appears, indicating the **Family System** answers are complete (**Large Family Assessment Topics** grid).

6. Click, **Summary of Recommendation**.

Provider / Workload / Large Family Assessment **Large Family Assessment Information**

PROVIDER NAME / ID: CATEGORY: *Home*

Large Family Assessment Topics

Topic	Status
Family Information	Children Residing in the Home: 6 of 6 Child(ren) Completed Children Not Residing in the Home: 0 of 0 Child(ren) Completed
Family Motivation	1 of 1 Answer(s) Provided
Special Needs	4 of 4 Answer(s) Provided
Resources and Supports	4 of 4 Answer(s) Provided
Opinions of other children, adults and service providers	4 of 4 Answer(s) Provided
Family System	3 of 3 Answer(s) Provided
Summary of Recommendation	Pending

Validate / Process for Approval

Creating a Large Family Assessment

Adding Summary of Recommendation Information

The **Summary of Recommendation Details** screen appears.

1. Add narrative in the text box labeled, **Summary of recommendation for approval of the large family assessment of the prospective adoptive family, or the assessor's reasons for not recommending approval of the large family assessment.**
2. Make a selection from the **Recommendation** drop-down menu.
3. Add a **Recommendation Date**.
4. Click, **Save**.

Provider / Workload / Large Family Assessment **Summary of Recommendation Details**

Your data has been saved.

PROVIDER NAME / ID: [] CATEGORY: Home

Recommendation

Summary of recommendation for approval of the large family assessment of the prospective adoptive family, or the assessor's reasons for not recommending approval of the large family assessment [\(expand full screen\)](#)

XXXXXX

ABC 19995

Assessor: [] Status: In Progress

Recommendation: [] Recommendation Date: []

Apply **Save** Cancel

The **Large Family Assessment Information** screen appears, indicating a status of **Recommended**.

5. Click, **Validate/Process for Approval**.

Provider / Workload / Large Family Assessment **Large Family Assessment Information**

Your data has been saved.

Large Family Assessment Topics

Topic	Status
Family Information	Children Residing in the Home: 6 of 6 Child(ren) Completed Children Not Residing in the Home: 0 of 0 Child(ren) Completed
Family Motivation	1 of 1 Answer(s) Provided
Special Needs	0 of 4 Answer(s) Provided
Resources and Supports	0 of 4 Answer(s) Provided
Opinions of other children, adults and service providers	4 of 4 Answer(s) Provided
Family System	3 of 3 Answer(s) Provided
Summary of Recommendation	Recommended

Validate / Process for Approval

Creating a Large Family Assessment

Important: If there is an unresolved issue(s), the **Large Family Assessment Topics** screen will appear, detailing that issue(s). The issue(s) listed must be resolved before you will have the ability to process the Large Family Assessment for approval.

Provider / Workload / Large Family Assessment **Large Family Assessment Topics**

PROVIDER NAME / ID: CATEGORY: Home

Unresolved Tasks

Assessor: Agency:

Topic	Message
Family Information	Child Residing in the home status is missing

Completing the Process Approval Information

If there are no unresolved issues when you click, Validate/Process for Approval (Large Family Assessment Information screen), The **Process Approval** screen appears.

1. Make a selection from the **Action** drop-down menu.
2. Add any necessary remarks in the Comments box.
3. Make a selection from the **Reviewer/Approver** drop-down menu.

Note: The Large Family Assessment should be routed to the agency supervisor for review/approval (similar to the home study approval process).

4. Click, **Save**.

Process Approval

Work Item

ID: Type: PROVIDER Reference:

Task ID: Task Type: Large Family Assessment Task Reference: Task Status:

Action: * Please Select An Action

Comments:

Spell Check Clear 2000

Agency:

Reviewers/ Approvers: Please Select A Reviewer/Approver

Save Cancel

Important: When the Large Family Assessment record is approved, a report icon will display on the Large Family Assessment History screen, on the right side of each record, where the user can generate the JFS 1530 report.

If you need additional assistance, please contact the SACWIS Help Desk.