

## Field Assessment – FAQ's

### **I have completed the Assessment Pathway and the wrong assessment framework has been selected. How do I change it?**

If you have answered the pathway questions and it has identified the wrong assessment, you will need to navigate to the Field Assessment record and click on the Edit button. Once in edit mode, under the Field Assessment Pathway there will be a 'Change Field Assessment Pathway?' tick box. You will then need to Launch assessment and complete a new pathway. Once the pathway is completed, fill in the Pathway Override Rationale. When you click next, it is submitted to the manager for approval. See Field Assessment Pathways QRG014.

### **I have started my assessment and now I can't find it? Where is it?**

Once an assessment has been launched, it will appear in the related assessments list on the person role page, Case and Field Assessment record.

### **I'm trying to submit for approval, but it's not working. What do I do?**

Remember that the Field Assessment is a shell that contains all the assessment information. When you need to approve one thing (e.g Safety Assessment) the whole Field Assessment shell will need to be submitted for approval. Check that you are submitting for approval at the field assessment level and not the individual item level. If this does not work check that the assessment is allocated to you and the next approver is correct.

### **My Field assessment was rejected; I have fixed the issue but still can't submit for approval. What do I need to do?**

To be able to submit for approval you will need to work through the assessment guided flow again. The information will still be there but you'll need check over the assessment to ensure that the changes have been made and the rest of the assessment is correct. Once you've worked through the guided flow and clicked the 'finish' button, the status of the assessment will change from 'rejected' to 'complete'. You can then submit the whole Field Assessment to your manager for approval.

### **The Risk Assessment is not launching from the Field Assessment, why not?**

Check that you have an approved PAC, AC and Safety Assessment. Once these have been approved you will be able to launch your Risk Assessment.

### **How do I link/relate a new Triage report to an existing Field Assessment?**

You should only relate a new Triage report to a Field Assessment where:

1. The reported issue is already known
2. You can do a new PAC, AC and Safety to ensure the new issue is addressed

To link the Triage to the Field Assessment go to the triage record, you need to populate the 'related assessment' field with the current field assessment (ID ASM XXX). This needs to occur during the Triage phase.

### Where do I attach the safety plan?

A signed safety plan should be attached to the Safety Assessment details page (which sits inside the Field Assessment).

You can also create a blank safety plan report or create a safety plan report within the Safety Assessment details page. This should be saved as a PDF in Notes and Attachments.

### I have done my Safety Assessment, Risk Assessment and Judgements and Outcomes, I now need to do my Risk Reassessment and Safety Review assessment (or Alternate Review Assessment), where and how do I do this?

First check that your Field Assessment record is approved and its status 'complete'. Your Safety Review, Risk Reassessment and Alternate Review assessments sit in the Review Assessment. To create any review assessment you will need to launch these from the case, click on the 'Review Assessment' action button. You can then select the assessment that you need.

## Helpful tips

1. Launch the Field assessment from the Triage record
2. Check that you are the owner of the Field assessment
3. All children and young people in the household being assessed need a role of 'Subject' in the Field Assessment
4. Check that **all** parents/carers in the household have the role of 'Subject related Participant' in the Field Assessment
5. Launch all assessments (initially) from the 'Launch Assessment' action button at the top of the Field Assessment record
6. Remember the Launch Assessment button has more than one purpose
  - a. Launches pathway
  - b. Launches SARA or Alternate
  - c. Launches Risk assessment
7. Always edit assessments from the 'Edit Assessment' button at the top of the assessment's details page – this will take you back to the guided flow
8. Don't refresh in the middle of an assessment flow
9. Check the correct CSC is selected
10. Generate the Summary report before it is approved
11. Approvals needs to happen from the Field Assessment record
12. To submit a PAC/AC/assessment for approval, its status needs to be 'complete'