



Family Development Matrix
Pathway to the Prevention of Child Abuse and Neglect
Database Manual 2012
Matrix Outcomes Model, LLC ©

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PURPOSE

The Family Development Matrix/Pathway to Prevent Child Abuse and Neglect Model (FDM) is a tool that is used in partnership with families to assess their strengths and issues of concerns. The FDM facilitates participation by the family and the worker in case management, and it measures over time the progress of family outcomes and the effectiveness of interventions. The FDM is especially appropriate, but not exclusive, to use with families that are referred for risk of child abuse and/or neglect. All families considered at risk should benefit because the FDM is a strength based assessment and empowerment plan leading to measureable outcomes.

The FDM data should be used by the worker to share ongoing results with the family. In addition, the data can be used to help justify the establishment of new programs, maintain the sustainability of programs, and to provide both resources and support to children and families in your community.

- ✓ It is a tool that is completed in partnership with the family member to help you both better understand their current situation.
- ✓ It can help the family worker prioritize how best to address the areas that are of most concern.
- ✓ It identifies areas of strength that can be used as resource information.
- ✓ Helps you to track their progress over time.

GETTING STARTED

Below is the demonstration account used to test and practice the FDM Matrix Database. You may use your assigned agency account information to access the database. If you do not have an individual account and would like to request a new account, please contact Jerry Endres, Project Director, at jendres@csumb.edu .

MY ACCOUNT

My Account displays major functions used to complete case management tasks:

The screenshot shows the 'My Account' web interface. On the left is a navigation menu with 'My Account', 'Case Management', 'Indicator Editor', 'Intervention Editor', 'Reports', and 'Help Center'. The main content area is titled 'My Account' and shows 'FDMdemo' as the user. A 'Limit by Two Digit Worker Code' field is present. Below this are two tables: 'ALL OVERDUE ASSESSMENTS' and 'ALL CLIENTS WITH OPEN ASSESSMENTS'. The first table lists clients with overdue assessments, and the second lists clients with open assessments. Red boxes with numbers 1 through 5 highlight specific features: 1 points to the user name 'FDMdemo', 2 points to the worker code filter, 3 points to the general statistics, 4 points to the client code links in the tables, and 5 points to the navigation menu.

GENERAL STATISTICS
Total Clients: 522
Open Clients: 402
Indicators: 29
Interventions: 62

ALL OVERDUE ASSESSMENTS
(over 3 months since assessment process began)

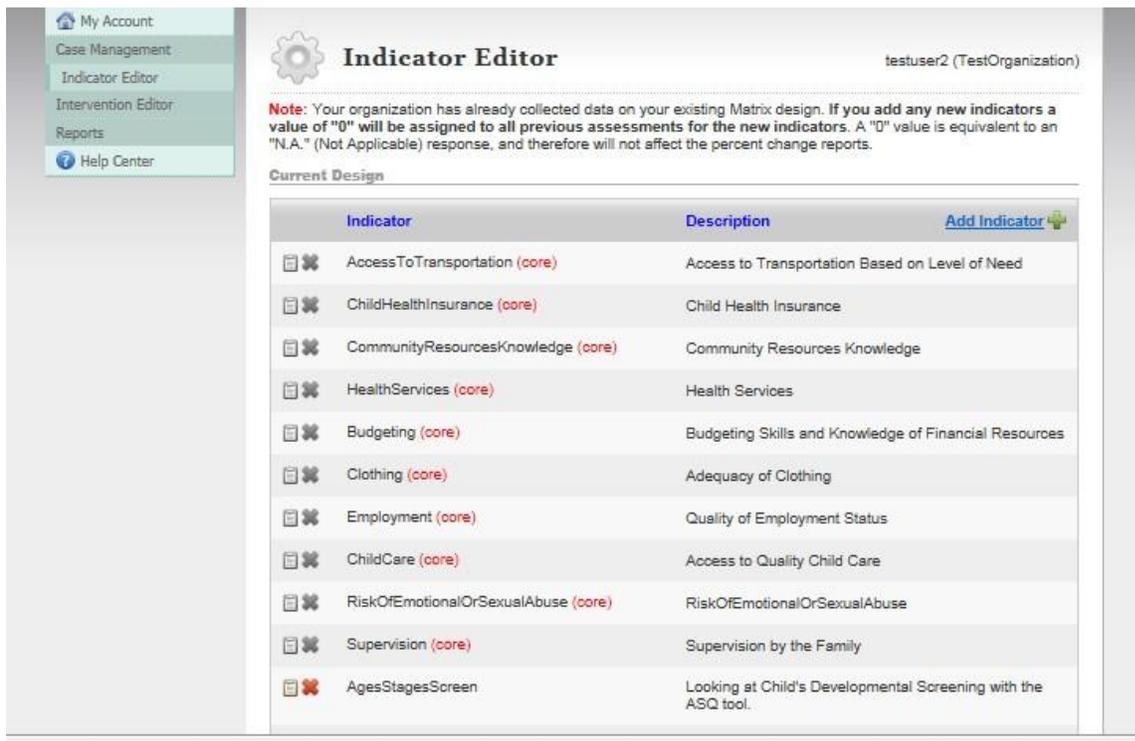
Client	Date	Assessment Stage
01m2010	05-19-2011	Indicators
hdf	05-19-2011	Checklist
4df161212a001	04-15-2011	Checklist
1af000	03-02-2011	Empowerment
67894	03-02-2011	Indicators
2dm0103639o	03-01-2011	Checklist
5553338888	03-01-2011	Checklist
4bm210fresno	02-09-2011	Checklist
4df1iose	02-02-2011	Checklist
4DF000RUBY	01-24-2011	Checklist

ALL CLIENTS WITH OPEN ASSESSMENTS

Client	Date	To Be Completed
4af12070110a101	12-20-2011	Checklist
1AM000	12-09-2011	Indicators
4AF10071010b002	11-29-2011	Indicators
1BF011Dave_11_21	11-09-2011	Indicators
67894	03-02-2011	Indicators
2dm0103639o	03-01-2011	Indicators
5553338888	03-01-2011	Checklist
4bm210fresno	02-09-2011	Checklist
4df1iose	02-02-2011	Checklist
4DF000RUBY	01-24-2011	Checklist
4cf000judi	01-21-2011	Checklist

1. Your **account information** such as username, email, and organization.
2. A **worker code** function that allows you to review clients assigned to you.
3. The agency's general **statistics**.
4. On the far right side of the screen you see a list of clients with **overdue assessments** and clients with **open assessments**. You can click on the code to be sent to the last completed form and complete the process.
5. A navigation bar listing the four major functions in developing your Matrix Design: **Case Management, Indicator Editor, Intervention Editor, and Reports**.

INDICATOR EDITOR



The screenshot shows the 'Indicator Editor' interface. On the left is a navigation menu with links for 'My Account', 'Case Management', 'Indicator Editor', 'Intervention Editor', 'Reports', and 'Help Center'. The main content area is titled 'Indicator Editor' and shows the user 'testuser2 (TestOrganization)'. A note states: 'Note: Your organization has already collected data on your existing Matrix design. If you add any new indicators a value of "0" will be assigned to all previous assessments for the new indicators. A "0" value is equivalent to an "N.A." (Not Applicable) response, and therefore will not affect the percent change reports.' Below this is a section for 'Current Design' containing a table of indicators.

Indicator	Description	Add Indicator
AccessToTransportation (core)	Access to Transportation Based on Level of Need	
ChildHealthInsurance (core)	Child Health Insurance	
CommunityResourcesKnowledge (core)	Community Resources Knowledge	
HealthServices (core)	Health Services	
Budgeting (core)	Budgeting Skills and Knowledge of Financial Resources	
Clothing (core)	Adequacy of Clothing	
Employment (core)	Quality of Employment Status	
ChildCare (core)	Access to Quality Child Care	
RiskOfEmotionalOrSexualAbuse (core)	RiskOfEmotionalOrSexualAbuse	
Supervision (core)	Supervision by the Family	
AgesStagesScreen	Looking at Child's Developmental Screening with the ASQ tool.	

Click on the Indicator Editor link. You will automatically see your Matrix Design.

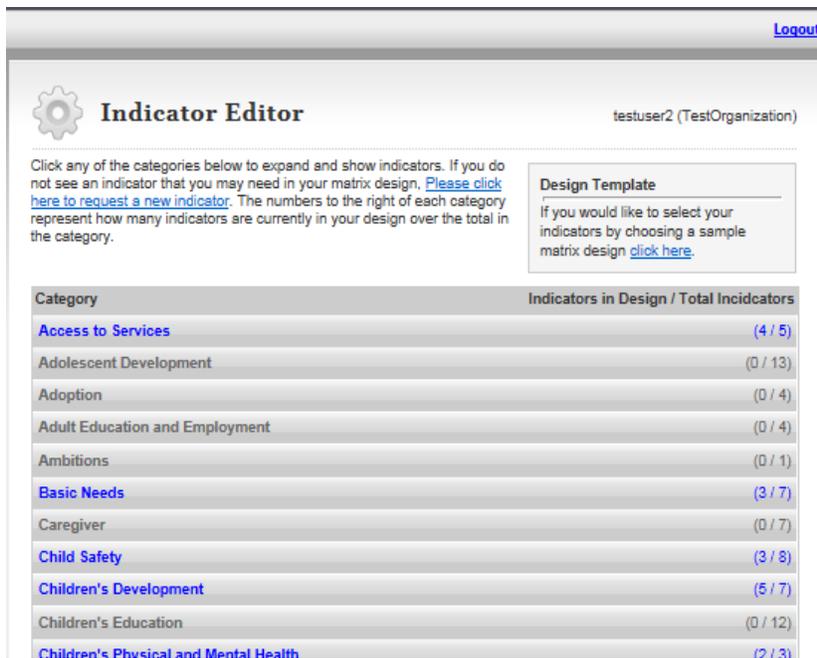
A **Matrix Design** is a set of core and optional indicators selected for your collaborative and then for your agency.

A **core indicator** is required to have in your Matrix Design, which explains why the indicators cannot be deleted (in gray) and cannot edit the indicator in any way.

An **optional indicator** is not required to have in your Matrix Design and can be deleted, however contact your agency or county collaborative to decide whether to delete an indicator. These optional indicators have a bright red X next to it, to indicate "deletion".

ADD AN INDICATOR TO YOUR DESIGN

1. Click on the top right link labeled “ Add Indicator +”



The screenshot shows the 'Indicator Editor' interface. At the top right, there is a 'Logout' link. Below the header, the user is identified as 'testuser2 (TestOrganization)'. A 'Design Template' box contains instructions: 'If you would like to select your indicators by choosing a sample matrix design [click here](#).' Below this is a table of categories with their indicator counts.

Category	Indicators in Design / Total Incidicators
Access to Services	(4 / 5)
Adolescent Development	(0 / 13)
Adoption	(0 / 4)
Adult Education and Employment	(0 / 4)
Ambitions	(0 / 1)
Basic Needs	(3 / 7)
Caregiver	(0 / 7)
Child Safety	(3 / 8)
Children's Development	(5 / 7)
Children's Education	(0 / 12)
Children's Physical and Mental Health	(2 / 3)

You will see all indicators available in the Matrix Database. This entire list of indicators is called the **reference set**.

On the left you see the category names and on the right you see the number of indicators you have in your design out of the total number of indicators under that category.

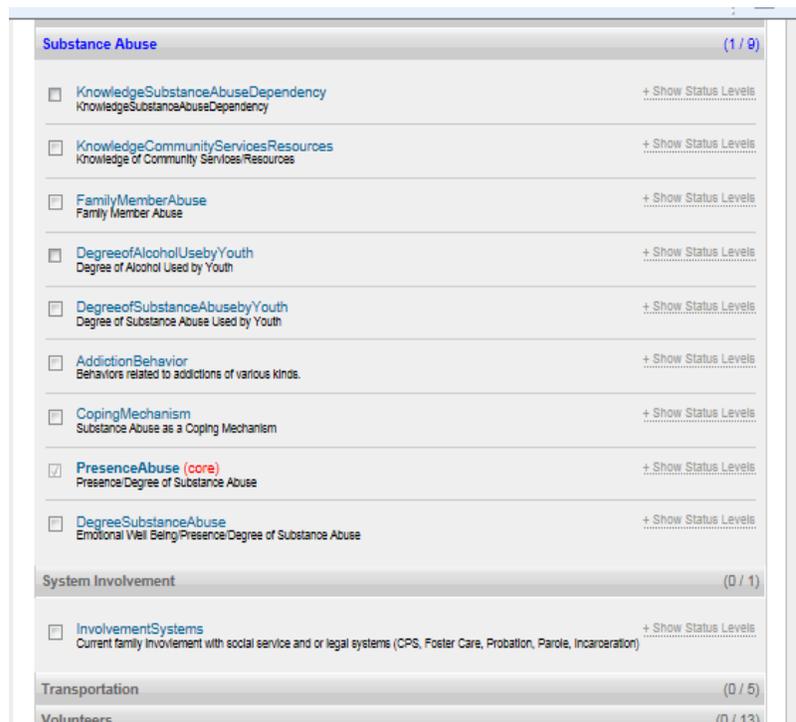
A **category** is a group of indicators sorted under one main topic.

2. Click on the category of interest (all the indicators under that category will show).

To read the status level descriptions, click on “show status levels.”

3. Check mark the box next to the indicator you wish to and click “save changes”.

A check marked box indicates that indicator has been added already.



The screenshot shows the 'Substance Abuse' category page. The title is 'Substance Abuse' with a count of '(1 / 9)'. Below the title is a list of indicators, each with a checkbox and a '+ Show Status Levels' link. The 'PresenceAbuse (core)' indicator is checked.

Indicator	Status	Action
KnowledgeSubstanceAbuseDependency KnowledgeSubstanceAbuseDependency	<input type="checkbox"/>	+ Show Status Levels
KnowledgeCommunityServicesResources Knowledge of Community Services/Resources	<input type="checkbox"/>	+ Show Status Levels
FamilyMemberAbuse Family Member Abuse	<input type="checkbox"/>	+ Show Status Levels
DegreeofAlcoholUsebyYouth Degree of Alcohol Used by Youth	<input type="checkbox"/>	+ Show Status Levels
DegreeofSubstanceAbusebyYouth Degree of Substance Abuse Used by Youth	<input type="checkbox"/>	+ Show Status Levels
AddictionBehavior Behaviors related to addictions of various kinds.	<input type="checkbox"/>	+ Show Status Levels
CopingMechanism Substance Abuse as a Coping Mechanism	<input type="checkbox"/>	+ Show Status Levels
PresenceAbuse (core) Presence/Degree of Substance Abuse	<input checked="" type="checkbox"/>	+ Show Status Levels
DegreeSubstanceAbuse Emotional Well Being Presence/Degree of Substance Abuse	<input type="checkbox"/>	+ Show Status Levels

System Involvement (0 / 1)

InvolvementSystems Current family involvement with social service and or legal systems (CPS, Foster Care, Probation, Parole, Incarceration)	<input type="checkbox"/>	+ Show Status Levels
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Transportation (0 / 5)

Volunteers (0 / 13)

REQUEST A NEW INDICATOR

To request a new indicator not in the reference set:

1. Click on "add indicator +."
2. Click on the "[Please click here to request a new indicator](#)" link.
3. Fill out the information below, and click "send."

Didn't Find What You Were Looking For?

If you have carefully checked the available indicators and have not found an indicator to suit your needs, please use this form to request one. We will do our best to accomodate your needs.

Contact

Title:

Ms. Mr.

First Name:

Last Name:

Telephone:

 - -

Email Address:

Category: Select an existing category to assign this indicator to, or choose "New" if you would like to create a new category.*

*New

If you chose to create a new category, please enter the name here.

n.a.

Brief description of the purpose for this category

Requested Indicator Name : *

Description of Indicator

Description for status level "Critical" :**

Description for status level "At Risk ":

Description for status level "Stable":

Description for status level "Safe/Self-Sufficient":

ADD A TEMPLATE TO YOUR DESIGN

A **template** is a preset list of indicators that track a specific area of focus.

1. Click on the top right link labeled " Add Indicator +"
2. Click in the box "Design template" on the top right side of the page. (You will see a list of templates.)
3. Click on the titles to see list of indicators. Select the template you wish to add, and hit "Choose this template."



Indicator Editor

Please select a sample template from the list by selecting one of the radio buttons and clicking the Choose This Template button. Pick one that most closely matches the type of activities your organization specializes in. Clicking on the template name will show what categories and indicators are included in the design. By choosing a sample Matrix design template you can have a complete Matrix design created for you instantly. After it is created, you can edit the design to make it suit your needs. You will be able to add or delete indicators as needed. You will also be able to edit the wording of the status level labels and descriptions.

Template Name	Description
<input type="radio"/> AdolescentDevelopment	Adolescent Development
<input type="radio"/> ChildrensDevelopment	Children's Development
<input type="radio"/> FamilyDevelopment	Family Development
<input type="radio"/> FamilyDevelopmentV2	Alternative to Family Development Template
<input type="radio"/> LongTermCare	Long-term care culture change matrix
<input type="radio"/> PathwayCoreIndicators	Pathway

EDIT AN OPTIONAL INDICATOR

1. Click on the clipboard symbol next to the indicator you wish to edit. (The status level boxes will show up so you can make edits on the same page.)
2. Hit "Save Changes" when you're done.

 **AdolescentJobSkills** Adolescent Job Skills, Work History

If you would like to customize the status level label for this indicator just type over the text in the status level label. If you would like to change the status level description just type over the status level description.

Status Level 1: In Crisis	I do not have a work history or job seeking skills.
Status Level 2: At Risk	I have a limited work history and/or job skills.
Status Level 3: Stable	I can look for work with assistance, has some job skills and/or some work history.
Status Level 4: Safe/Self-Sufficient	I have developed job-skills, can search for a job and keep a job.

N/A (Not Applicable) option available: Yes No

DELETE AN OPTIONAL INDICATOR FROM YOUR DESIGN

1. Click on the red X next to the indicator you wish to delete. You will be asked to confirm your decision.

Indicator	Description	Add Indicator
Ⓡ X AccessToTransportation (core)	Access to Transportation Based on Level of Need	
lii X ChildHealthInsurance (core)	Child Health Insurance	
Ⓡ X CommunityResourcesKnowledge (core)	Community Resources Knowledge	
Ⓡ X HealthServices (core)	Health Services	
Ⓡ X AdolescentJobSkills	Adolescent Job Skills, Work History	

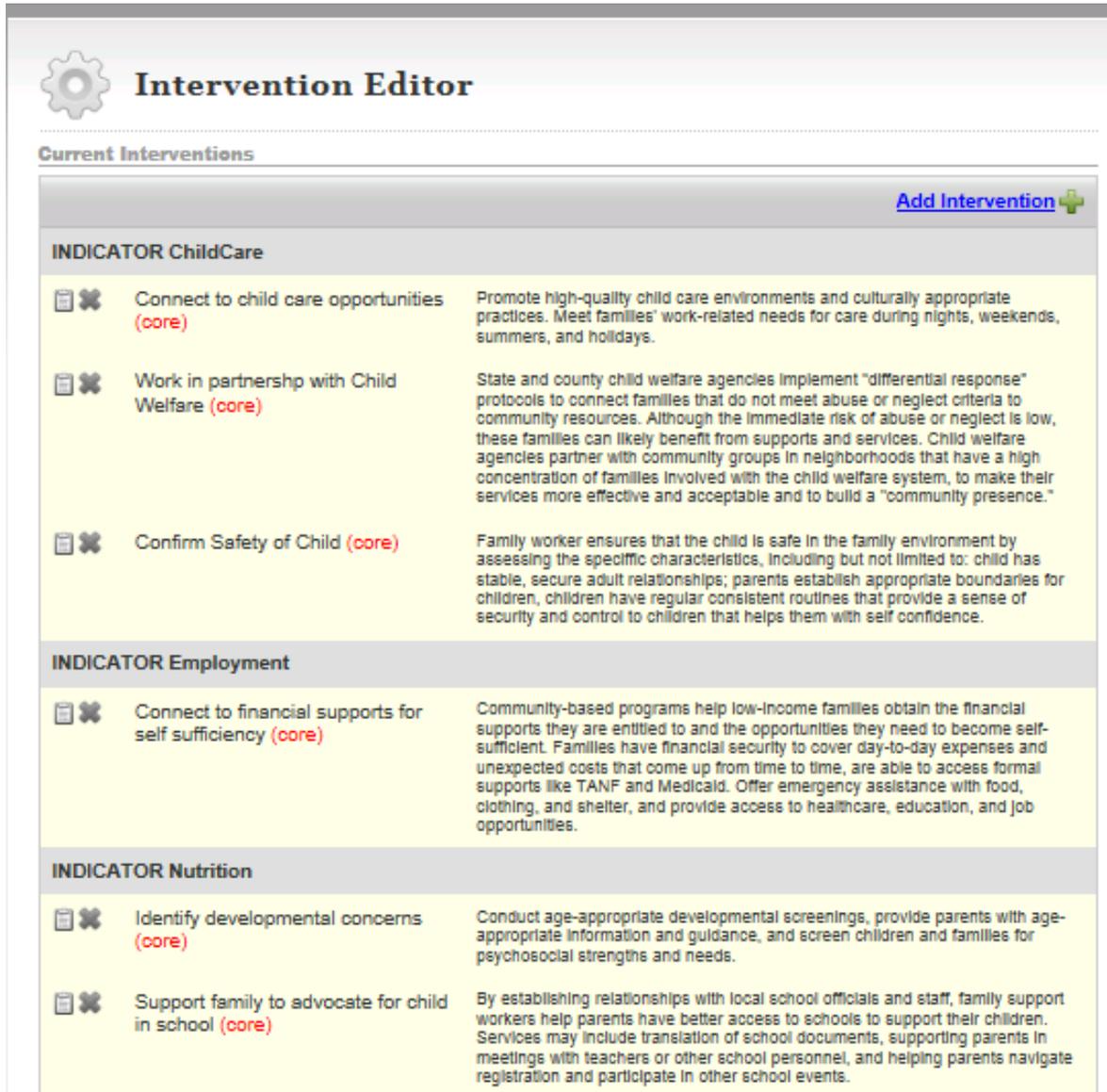
Delete AdolescentJobSkills from your design?

Yes remove from this design:	NO I have changed my mind:
<input type="checkbox"/> YES	<input type="checkbox"/> NO

INTERVENTION EDITOR

The Intervention Editor allows you to add, edit, or delete interventions.

Click on the Intervention editor Link. You will see a list of all intervention available to you.



The screenshot shows the 'Intervention Editor' interface. At the top left is a gear icon. The title 'Intervention Editor' is centered. Below the title is a section for 'Current Interventions' with an 'Add Intervention' button (plus sign icon) on the right. The interventions are grouped into three categories: 'INDICATOR ChildCare', 'INDICATOR Employment', and 'INDICATOR Nutrition'. Each category contains a list of interventions with icons, titles, and descriptions.

Indicator	Intervention	Description
INDICATOR ChildCare	Connect to child care opportunities (core)	Promote high-quality child care environments and culturally appropriate practices. Meet families' work-related needs for care during nights, weekends, summers, and holidays.
	Work in partnership with Child Welfare (core)	State and county child welfare agencies implement "differential response" protocols to connect families that do not meet abuse or neglect criteria to community resources. Although the immediate risk of abuse or neglect is low, these families can likely benefit from supports and services. Child welfare agencies partner with community groups in neighborhoods that have a high concentration of families involved with the child welfare system, to make their services more effective and acceptable and to build a "community presence."
	Confirm Safety of Child (core)	Family worker ensures that the child is safe in the family environment by assessing the specific characteristics, including but not limited to: child has stable, secure adult relationships; parents establish appropriate boundaries for children, children have regular consistent routines that provide a sense of security and control to children that helps them with self confidence.
INDICATOR Employment	Connect to financial supports for self sufficiency (core)	Community-based programs help low-income families obtain the financial supports they are entitled to and the opportunities they need to become self-sufficient. Families have financial security to cover day-to-day expenses and unexpected costs that come up from time to time, are able to access formal supports like TANF and Medicaid. Offer emergency assistance with food, clothing, and shelter, and provide access to healthcare, education, and job opportunities.
INDICATOR Nutrition	Identify developmental concerns (core)	Conduct age-appropriate developmental screenings, provide parents with age-appropriate information and guidance, and screen children and families for psychosocial strengths and needs.
	Support family to advocate for child in school (core)	By establishing relationships with local school officials and staff, family support workers help parents have better access to schools to support their children. Services may include translation of school documents, supporting parents in meetings with teachers or other school personnel, and helping parents navigate registration and participate in other school events.

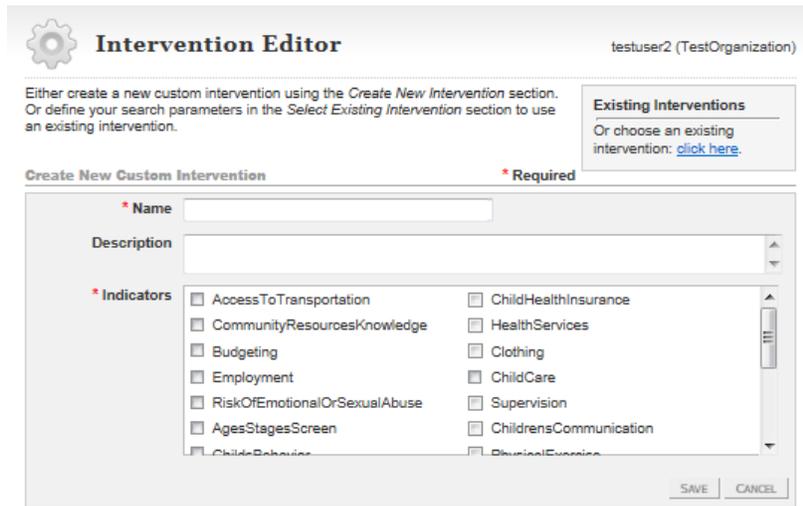
Core Pathway Interventions cannot be deleted or modified.

Custom Interventions are developed by the collaborative or agency.

Custom Interventions can be added, edited, and deleted.

ADD AN INTERVENTION

1. Click on "add intervention" located on right hand side of table.
2. Fill out the information requested (name, description, indicator connect), and then click save.



The screenshot shows the "Intervention Editor" interface. At the top left is a gear icon. The title "Intervention Editor" is centered, and the user "testuser2 (TestOrganization)" is in the top right. Below the title, there is a note: "Either create a new custom intervention using the *Create New Intervention* section. Or define your search parameters in the *Select Existing Intervention* section to use an existing intervention." To the right of this note is a box titled "Existing Interventions" with the text "Or choose an existing intervention: [click here](#)".

The main form area is titled "Create New Custom Intervention" with a red asterisk and "Required" next to it. It contains the following fields:

- * Name**: A text input field.
- Description**: A text area with a scroll bar.
- * Indicators**: A list of checkboxes for various indicators, including:
 - AccessToTransportation
 - CommunityResourcesKnowledge
 - Budgeting
 - Employment
 - RiskOfEmotionalOrSexualAbuse
 - AgesStagesScreen
 - ChildHealthInsurance
 - HealthServices
 - Clothing
 - ChildCare
 - Supervision
 - ChildrensCommunication
 - PhysicalExercise

At the bottom right of the form are "SAVE" and "CANCEL" buttons.

EDIT AN INTERVENTION

1. Click on the clipboard symbol next to the intervention you wish to edit. The information will show up and you can type in your changes.

DELETE AN INTERVENTION

1. Click on the red "X" symbol next to the intervention you wish to delete, and you will confirm your decision.

REPORTS

Reports can be beneficial in helping agencies with funding opportunities and to track family/client progress. The Matrix Database allows for 2 types of reports:

1. **The Percent Possible Change Report** displays the scores between assessments and calculates the percent of total possible change between starting and ending scores. Since the scores range between 1 and 4, the highest possible score change would be 3, or 100% possible change.
2. **The Status Level Distribution Report** displays the percent of responses at each status level. It also includes the percent possible change between the starting and ending scores.
3. On the right side of the screen you see saved reports. This allows you to compare reports over a long period of time with each other, and it lessens the stress of keeping track the last time a report was generated.

The screenshot shows a web interface titled "Reports" for a user named "testuser (TestOrganization)". It features two main sections on the left and a list of saved reports on the right.

Percent Possible Change Report (labeled 1):

The Percent Possible Change Report displays the scores between assessments and calculates the percent of total possible change between starting and ending scores. Since the scores range between 1 and 4, the highest possible score change would be 3, or 100% possible change.

Status Level Distribution Report (labeled 2):

The Status Level Distribution Report displays the percent of responses at each status level. It also includes the percent possible change between the starting and ending scores.

Saved Reports (labeled 3):

Date	Report Title
03/01/2011	Testing 1 to 2 visits
05/09/2011	JES change
05/13/2011	JES FF
06/07/2011	JESH
06/08/2011	Fresno JES
07/11/2011	

HOW TO READ TABLE AND GRAPH REPORTS

Status Level Distribution

Indicator	Visit	Status Level				Clients	% Change
		1	2	3	4		
AccessToTransportation	1	33.3%	33.3%	33.3%	0%	105	
	2	66.7%	33.3%	0%	0%	105	-22.22%
ChildHealthInsurance	1	33.3%	33.3%	0%	33.3%	45	
	2	0%	100%	0%	0%	45	-11.11%
CommunityResourcesKnowledge	1	33.3%	0%	66.7%	0%	135	
	2	0%	66.7%	33.3%	0%	135	0.00%

The Status Level Distribution Report displays the percent of responses at each status level. It also includes the percent possible change between the starting and ending scores.

The format for reading the table reports for status level distribution is:

"For **Indicator**, based on **Client #** who completed an assessment for **visit #**: **Status level 1%** were In-Crisis, **Status level 2%** were At-Risk, **Status level 3%** were Stable, and **status level 4%** were Safe/Self-sufficient. During **visit #**, based on **Client #** who completed and assessment, **Status level 1%** were In-Crisis, **Status level 2%** were At-Risk, **Status level 3%** were Stable and **Status level 4%** were Safe/Self-sufficient, producing a possible change of **%**."

HOW TO GENERATE REPORTS

Both reports will require fill out the same information:

1. Select your target population: Choose either the Client Specific buttons (Active, Inactive, All) or Select by Grouping Codes methods for selecting subjects for this report.
To use group codes, you will need to use the latest codes sheet, available through your collaborative coordinator.
2. You can further refine your report to include only records from a specific date range and/or by assessment ranges (for example: from assessment 1 to assessment 2 would only show the first and second assessment for a client)
3. The last step in completing this report is defining which indicators you would like to target. Choose at least one indicator to finish this report. Once you have selected the indicators you would like to graph, press the generate report button

The screenshot shows a web-based report generation interface. It is divided into three main sections, each with a numbered callout:

- Step 1: Select the Specific Subjects for Your Report** (marked as * Required). This section contains two options: "Select Specific Clients" and "Select By Grouping Codes Within Subject ID". Under "Select Specific Clients", there are buttons for "Select All Clients" and "Unselect Clients", and a table of client records. A red callout labeled "1" points to this section.
- Step 2: Refine Your Search**. This section includes "Refining Your Search" instructions and a form with fields for "Assessments From Number" (set to ALL), "Assessment From Date", and "Assessment To Date". A red callout labeled "2" points to this section.
- Step 3: Choose Indicators to Target and Finish** (marked as * Required). This section includes instructions to choose at least one indicator and a list of indicators with checkboxes. A "Generate Report" button is at the bottom left. A red callout labeled "3" points to this section.

Client ID	No. of Assessments	Date Added
<input type="checkbox"/> 4BF101	1	03/01/2011
<input type="checkbox"/> 3DM020FREE	1	03/01/2011
<input type="checkbox"/> 2EM121	1	03/01/2011
<input type="checkbox"/> 1BM023NONE	1	03/01/2011
<input type="checkbox"/> 3AF101JT	2	03/01/2011
<input type="checkbox"/> 1CF002TestingJT	2	03/01/2011
<input type="checkbox"/> 1AM000CUSTOMIT	2	03/01/2011

Indicator	Indicator
<input type="checkbox"/> AccessToTransportation	<input type="checkbox"/> ChildHealthInsurance
<input type="checkbox"/> CommunityResourcesKnowledge	<input type="checkbox"/> HealthServices
<input type="checkbox"/> Budgeting	<input type="checkbox"/> Clothing
<input type="checkbox"/> Employment	<input type="checkbox"/> ChildCare
<input type="checkbox"/> RiskOfEmotionalOrSexualAbuse	<input type="checkbox"/> Supervision
<input type="checkbox"/> AgesStagesScreen	<input type="checkbox"/> ChildrensCommunication

CASE MANAGEMENT

GETTING STARTED

The initial purpose of Case Management is to document the current status of a family and track change/progress during the time period they are participating in your agency's family support programs and services.

Before you meet with a family/client

Prepare for the assessment. Allow sufficient time to complete the entire process. We recommend a separate appointment for each assessment.

- a. For each family, the worker prepares an FDM folder that includes printed documents: FDM client id codes, consent form, the core and optional indicators for the FDM assessment; Matrix Visit Summary, The Glossary of Interventions; the Family Empowerment Plan (FEP); The Case Management Intake Form and Checklist. The Evaluation of Family Participation and Family Structure. These documents are used to conduct the assessment, select interventions, develop the family empowerment plan and record both worker and family activities.
- b. The documents can be copied by the agency for the client folders. The FDM forms are in paper form and after completion entered into the online system.
- c. The agency keeps a record of family information including names and client ids. The FDM database does not accept family identity information.

During your meeting with a family/client

1. Conduct the Assessment. The family worker thoroughly explains the purpose of the assessment and encourages the family to ask any questions as the family worker conversationally goes through all of the core indicators.
 - a. The worker interviews the family (member) and together they conduct an initial (baseline) assessment.
 - b. Using all of the FDM/Pathway core indicators and any optional indicators, the assessment facilitates a conversation where the family member tells their story.

- c. Attempt to use the FDM as a guideline for a conversation; however, it doesn't exactly flow like a natural conversation and it sometimes helps the family to move the order of questions to flow more naturally.
 - d. Cultural differences are taken into account as each question is fully explained to their understanding.
 - e. The family member and the worker together score each indicator's status level to fit the family's current situation.
2. Develop a Family Empowerment/Intervention Plan.
- a. The worker reviews with the family member the assessment by discussing and exploring the family's strength based experiences. The Matrix Visit Summary form should be used to record strengths and concerns to facilitate a family and worker conversation exploring how the family has achieved stability and self-sufficiency in certain indicator areas.
 - b. The worker and the family member identify areas for change and discuss possible goals for the family. The strengths from their experience should be used for planning to overcome obstacles for desired goals and issues of concerns.
 - c. The worker and the family member complete the Family Empowerment Plan and identify interventions from the "Glossary" or from agency custom interventions.
 - d. The worker and the family agree on what steps each one will take. The worker records those steps on the Empowerment Plan and they agree on the next meeting date.
 - e. The worker completes the "Case Management" questions, specifically the Case Management Intake Form and Check List.
 - f. The worker uses the completed forms to enter information into the FDM database.

After your meeting with a family/client

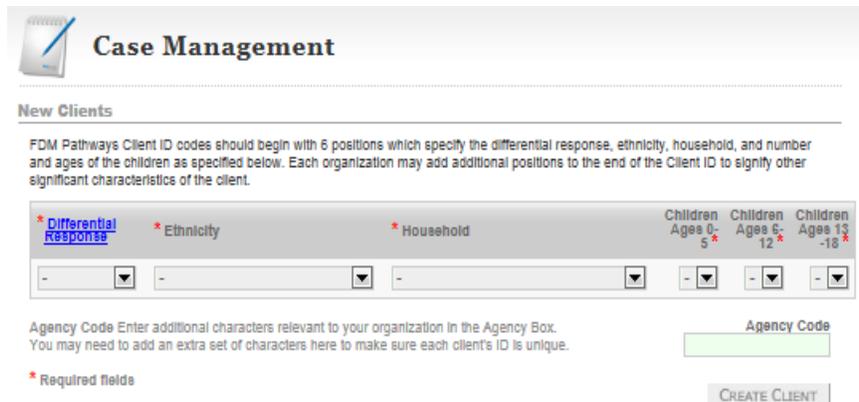
Gather your completed forms to prepare for data entry: Intake Form and Checklist, FDM Pathway Assessment form, Visit Summary, Intervention List, Family Empowerment Plan (if applicable), and Worker checklist.

FDM DATA ENTRY: BASELINE ASSESSMENT

The assessment is entered into the FDM database within 15 days of the assessment with the client. The following instructions apply.

Enter the Client ID

1. Use the scroll boxes to identify the family's DR pathway, Ethnicity, Head of Household, and ages of underage children in the home.
2. Any other space codes will be added to the "Agency Code" box.
3. Click on "Create client."



Case Management

New Clients

FDM Pathways Client ID codes should begin with 6 positions which specify the differential response, ethnicity, household, and number and ages of the children as specified below. Each organization may add additional positions to the end of the Client ID to signify other significant characteristics of the client.

* Differential Response	* Ethnicity	* Household	Children Ages 0-5 *	Children Ages 6-12 *	Children Ages 13-18 *
-	-	-	-	-	-

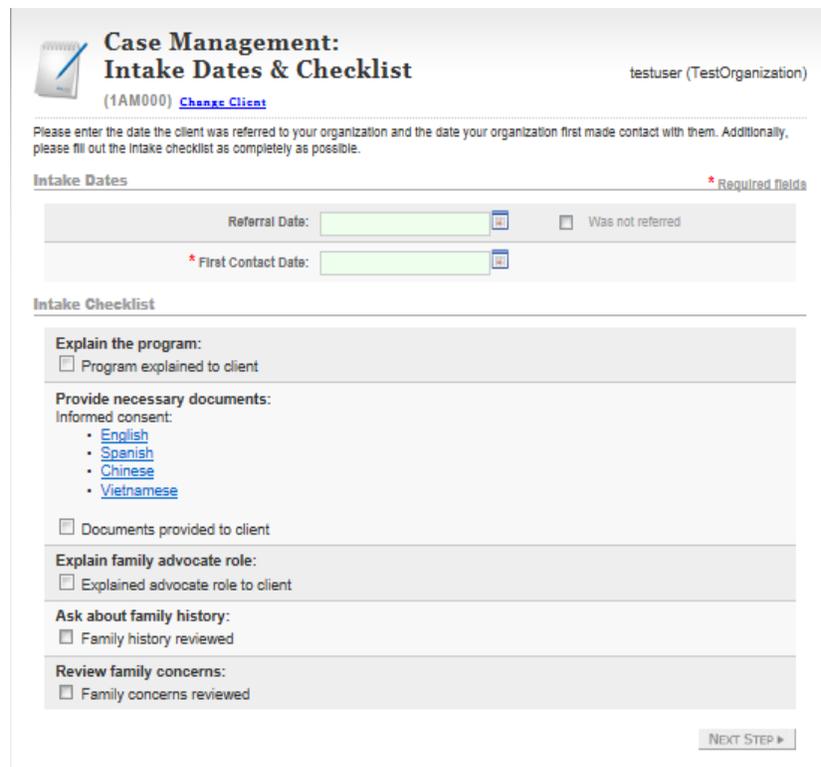
Agency Code Enter additional characters relevant to your organization in the Agency Box. You may need to add an extra set of characters here to make sure each client's ID is unique.

Agency Code

* Required fields

Complete Intake Form

1. Enter the date the client was referred to the agency, or not referred and the date you first made contact with the client.
2. Complete the "Case Management" intake by checking off the boxes according to the actual practice with this client.
3. Click on "Next Step."



Case Management: Intake Dates & Checklist

testuser (TestOrganization)

(1AM000) [Change Client](#)

Please enter the date the client was referred to your organization and the date your organization first made contact with them. Additionally, please fill out the intake checklist as completely as possible.

Intake Dates * Required fields

Referral Date: Was not referred

* First Contact Date:

Intake Checklist

Explain the program:

Program explained to client

Provide necessary documents:

Informed consent:

- [English](#)
- [Spanish](#)
- [Chinese](#)
- [Vietnamese](#)

Documents provided to client

Explain family advocate role:

Explained advocate role to client

Ask about family history:

Family history reviewed

Review family concerns:

Family concerns reviewed

Assessment

1. Enter the actual assessment date, then the assessment scores for each indicator including any worker notes.

2. Click on "Next Step."

The screenshot shows the 'Case Management: Assessment 1' form. At the top, there is a breadcrumb trail: Assessment > Visit Summary > Intervention > Empowerment Plan > Worker Checklist > Evaluation. The user is logged in as 'testuser (TestOrganization)'. The form title is 'Case Management: Assessment 1 (After Save)' with a client ID of '(1AM000)'. A confirmation message asks to verify the client and assessment date. Below this is the 'Assessment Info' section with a 'Date of Assessment' field. The 'Assessment' section is titled 'Access to Services' and contains a radio button group for 'AccessToTransportation' with four options: 'I have no access to transportation, even in an emergency.', 'I have no access to transportation to satisfy basic needs.', 'I have limited access to public or private transportation when needed.', and 'I have consistent, dependable transportation, public or private.' There is a 'PRINT THIS PAGE' button and a '* Required' indicator.

Visit Summary

The FDM Matrix Visit Summary is generated by the database. The Summary converts the assessment information into family strengths and concerns. The worker or data entry person prints a copy for themselves and the family. This document is used to review the assessment with the family. The worker's practice is to identify strengths to assist with issues of family concern.

1. On the Matrix Summary page, checkmark the appropriate target for intervention based on the choices of the family. Notice the indicators of concern have an asterisk. Try to limit the actual targets to no more than two indicators.

2. Click on "Next Step"

The screenshot shows the 'Visit Summary' form. The breadcrumb trail is: Assessment > Visit Summary > Intervention > Empowerment Plan > Worker Checklist > Evaluation. The user is logged in as 'testuser (TestOrganization)'. The form title is 'Visit Summary' with a client ID of '(1AM000)'. A message explains the 'Target' checkbox and the asterisk notation. Below this is the 'Assessment Number 1: 09/14/2011'. The 'Indicators' section is titled '* Recommended' and contains two tables. The first table, 'Access to Services', lists indicators: 'AccessToTransportation', 'ChildHealthInsurance', 'CommunityResourcesKnowledge', and 'HealthServices'. Each has a 'Strengths/Concerns' slider and a 'Target' checkbox. The second table, 'Basic Needs', lists indicators: 'Budgeting', 'Clothing', and 'Employment', also with sliders and target checkboxes. A 'PRINT THIS PAGE' button is visible.

Intervention Selection

1. Check the box next to the most appropriate intervention. Both Pathway and custom interventions (developed by the agency or the collaborative) are displayed for your selection.
2. If a new intervention is desired, open the link "add new custom intervention". (See "Add an Intervention" section for more instruction.)

Family Empowerment Plan

A Family Empowerment Plan will be created that will identify goals (to improve their situation), action (what the parent will work on or needs to do) and what you will do as the Case Manager / Family Advocate to assist them (interventions).

1. Complete the Family Empowerment Plan based on the conversation with the family member.
2. Make certain that all parts of the Empowerment Plan are completed.
3. Print a copy for the family and the case file, and then click on "Next Step".

Worker Checklist

1. Complete the "Case Worker" Check List.
2. Answer the level of participation by the family in the empowerment plan question. Answer the family structure question.
3. Go to Next Step

Assessment > Visit Summary > Intervention > Empowerment Plan > **Worker Checklist** > Evaluation [Logout](#)

Case Management: Worker Checklist testuser (TestOrganization)
(1AM000) [Change Client](#)

Please fill out the worker checklist preferably before moving on to the next assessment. This checklist is required to close this client.

Case Worker Check List * Required

- * Review the Matrix Summary to identify strengths, concerns, and interventions
 Yes No
- * Establish family driven goals based on assessments and family interest
 Yes No Not Needed
- * Link family to community service provider
 Yes No Not Needed
- * Assign Family Homework
 Yes No Not Needed
- * Set the next meeting
 Yes No This was their last meeting
- * Record the steps the family will take
 Yes No
- * Record the steps the worker will take
 Yes No

Assessment 1 Evaluation

You will evaluate the family's participation and meetings with the worker questions AFTER 3 months have passed.

1. Click on "Save" then exit out of this page.

Assessment > Visit Summary > Intervention > Empowerment Plan > Worker Checklist > **Evaluation** [Logout](#)

Case Management: Assessment Evaluation

Before completing the current assessment, please evaluate the family's participation since the last visit.

- * 1. Follow through on the empowerment plan
 No action taken by family
 Uneven follow through
 Full participation by family
- * 2. Barriers to meeting goals
 Family did not experience any barriers
 Family identified barriers/discussed with worker
 Family used strategies to overcome barriers
- * 3. Meetings with the family to review progress (Select one that most closely describes your experience with the family)
 Not at all
 Monthly
 Every two weeks
 Weekly
 Daily
- * 4. Participation in establishing family/community supports
 Family has less supports than they did when they began the program
 Family has same supports as they do at entry to program
 Family has increased some supports
 Family has increased all supports

FDM DATA ENTRY: A PRE-EXISTING FAMILY CLIENT

Conduct a subsequent assessment

To conduct a second or additional assessment:

1. On the " My Account" page, clients with open assessments and clients with overdue assessments (more than 3 months) are both displayed.

- a. Select a client you wish to complete a process for by clicking on their client ID.

Limit by Two Digit Worker Code:

ALL OVERDUE ASSESSMENTS
(over 3 months since assessment process began)

Client	Date	Assessment Stage
Joanna	09-20-2011	<input type="text" value="Checklist"/>

ALL CLIENTS WITH OPEN ASSESSMENTS

Client	Date	To Be Completed
26M100	03-14-2012	<input type="text" value="Intervention"/>
35F00121011e003	03-13-2012	<input type="text" value="Assessment"/>
35F200	03-09-2012	<input type="text" value="Intervention"/>
45F12123499e001	03-08-2012	<input type="text" value="Checklist"/>

- b. You will be redirected to the last page where you left off. Complete the casemanagement process. (See "FDM DATA ENTRY: BASELINE ASSESSMENT" for further instructions.)

OR

2. Click on the " Case Management" link (located on the left side of the navigation bar.)

Existing Clients

Search:

Client	First Contact Date	Status	Assessments
...	09-09-2009	Active	- <input type="text"/> <input type="button" value="+"/>
0224450	09-09-2009	Active	- <input type="text"/> <input type="button" value="+"/>
0854	09-18-2009	Active	- <input type="text"/> <input type="button" value="+"/>
08PF08RSUV000132	12-01-2009	Active	- <input type="text"/> <input type="button" value="+"/>
0#1005555	09-18-2009	Active	- <input type="text"/> <input type="button" value="+"/>

3. Under *Existing Clients*, locate the appropriate client ID.
4. Select the  (green cross) icon next to the client ID to add a new assessment for this client.
5. Complete the "Assessment Evaluation" Conduct the assessment with all of the steps the family is already familiar from the first assessment.
6. Enter the data for this assessment, review Matrix summary, update interventions, empowerment plan and evaluation of worker and family participation. (See "FDM DATA ENTRY: BASELINE ASSESSMENT" for further instructions)