



TM Case – Approve Safety Assessments Step Action Table



User

Case Worker and Case Worker Supervisor assigned to the Assessment or Case County.
Primary and Secondary Worker assigned to the Assessment or Case.

Process

This step action table describes the actions needed to:

- Submit a Safety Assessment for Approval.
- Approve or Deny a Safety Assessment.
- Override a Safety Assessment Approval.

Introduction

- Users with a Case Worker, Case Worker Supervisor, or Primary or Secondary Worker profile will be able to **submit** a Safety Assessment for approval and view the Approval History.
- Only a user with a **Case Worker Supervisor** profile will be able to approve or deny a Safety Assessment or to override a previous approval.
- For approvals, the supervisor must be affiliated to the county of the primary worker of the assessment.
- Upon approval, changes are not allowed in the *General Information, Current/Impending Danger, Strengths and/or Protective Capacities, Caregiver(s) Functioning, Child Functioning and Vulnerabilities, Current/Impending Danger Conclusion, and Safety Intervention* panels.

Important Note:

The steps demonstrating how to navigate to the *Safety Assessment* will be provided in the future as the navigation process is finalized.

This step action plan will provide the steps for completing the Safety Assessment details after it is created or accessed from an Assessment or a Case.

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Submit a Safety Assessment for Approval

Step	Action
1	<p>In the <i>Left Navigation</i> panel.</p> <ul style="list-style-type: none">Click General Information. <p>This will take you to the <i>General Information</i> panel of the Safety Assessment.</p>
2	<p>In the header for <i>General Information</i>.</p> <ul style="list-style-type: none">Click Actions.Select Approval. <p>This will open the <i>Safety Assessment Approval</i> pop-up window.</p>
3	<p>In the <i>Safety Assessment Approval</i> pop-up window.</p> <ul style="list-style-type: none">The <i>Safety Assessment Approval History</i> table displays sorted by <i>Dispositioned Date</i>, newest to oldest.The <i>Request Safety Assessment Approval</i> panel will be visible and enabled if:<ul style="list-style-type: none">There are no Approval History records orThe last Approval History record was Overridden or Denied.
4	<p>In the <i>Request Safety Assessment Approval</i> panel.</p> <ul style="list-style-type: none">The County field defaults to:<ul style="list-style-type: none">The County of the assigned Primary Worker, if the Request Approval action is restricted to the Primary Case Worker or Case Worker Supervisor assigned to the Assessment or Case County and cannot be changed.Otherwise, the primary County of the signed on worker assigned to the Assessment or Case and can be changed to any affiliated County.Click the County drop-down arrow, as required.Select the appropriate County from the list.The Sent To field defaults to the supervisor (based on primary affiliation) but can be changed to other supervisors in the County. To change the supervisor:<ul style="list-style-type: none">Click in the Sent To field and start typing the name of a supervisor.Select the appropriate Supervisor from the list.The Submitted By field displays the <i>Signed On User Name on Current Date Current Time</i>. This field cannot be changed.Comments are required in this text box prior to submittal for approval.<ul style="list-style-type: none">Click in the Comments field.Enter Comments.Click Submit.



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5	<p>In the <i>Safety Assessment Approval</i> pop-up window.</p> <ul style="list-style-type: none">• The <i>Safety Assessment Approval History</i> table is refreshed to include the Approval Request information.• The <i>Request Safety Assessment Approval</i> panel will be visible and disabled.• The <i>Approve Safety Assessment</i> panel will be visible and enabled.• The <i>Override Approval</i> button will be hidden.
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Approve or Deny a Safety Assessment

Step	Action
1	<p>In the <i>Left Navigation</i> panel.</p> <ul style="list-style-type: none"> Click General Information. <p>This will take you to the <i>General Information</i> panel of the Safety Assessment.</p>
2	<p>In the header for <i>General Information</i>.</p> <ul style="list-style-type: none"> Click Actions. Select Approval. <p>This will open the <i>Safety Assessment Approval</i> pop-up window.</p>
3	<p>In the <i>Safety Assessment Approval</i> pop-up window.</p> <ul style="list-style-type: none"> The <i>Safety Assessment Approval History</i> table is refreshed with the Approval Request. The <i>Request Safety Assessment Approval</i> panel will be visible and disabled if: <ul style="list-style-type: none"> The last Approval History record was Requested. The <i>Approve Safety Assessment</i> panel will be visible and enabled if: <ul style="list-style-type: none"> The last Approval History record was Requested. <p>Note: The Supervisor will be able to approve the Safety assessment if affiliated to the County identified in the Request Approval panel.</p>
4	<p>In the <i>Approve Safety Assessment</i> panel.</p> <ul style="list-style-type: none"> The Disposition field will not have a default. <ul style="list-style-type: none"> Click the Approved radio button to approve the Safety Assessment. Click the Deny radio button to deny the request for approval. The Dispositioned By field displays the <i>Signed On User Name on Current Date Current Time</i>. This field cannot be changed. The Notify Requester? field defaults to No. <ul style="list-style-type: none"> Click the Yes toggle to notify the requester of the approval decision. The <i>Notify Requester?</i> Field will be set to Yes and disabled if the <i>Disposition</i> is Denied. Comments are required if the <i>Disposition</i> is Denied. If needed, <ul style="list-style-type: none"> Click in the Comments field. Enter Comments. Click Submit.



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5	<p>In the <i>Safety Assessment Approval</i> pop-up window.</p> <ul style="list-style-type: none">• The <i>Safety Assessment Approval History</i> table is refreshed to include the Approval or Denial information.• If the Disposition is Approved:<ul style="list-style-type: none">○ The <i>Request Safety Assessment Approval</i> panel will be visible and disabled.○ The <i>Approve Safety Assessment</i> panel will be visible and disabled.○ The <i>Override Approval</i> button will be visible and enabled.• If the Disposition is Denied:<ul style="list-style-type: none">○ The <i>Request Safety Assessment Approval</i> panel will be visible and enabled.○ The <i>Approve Safety Assessment</i> panel will be hidden.○ The <i>Override Approval</i> button will be hidden.
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Override a Safety Assessment Approval

Step	Action
1	<p>In the <i>Left Navigation</i> panel.</p> <ul style="list-style-type: none">Click General Information. <p>This will take you to the General Information panel of the Safety Assessment.</p>
2	<p>In the header for <i>General Information</i>.</p> <ul style="list-style-type: none">Click Actions.Select Approval. <p>This will open the <i>Safety Assessment Approval</i> pop-up window.</p>
3	<p>In the <i>Safety Assessment Approval</i> pop-up window.</p> <ul style="list-style-type: none">The <i>Safety Assessment Approval History</i> table is refreshed with the Approval record.The <i>Request Safety Assessment Approval</i> panel will be visible and disabled if:<ul style="list-style-type: none">The last Approval History record was Requested or Approved.The <i>Approve Safety Assessment</i> panel will be visible and disabled if:<ul style="list-style-type: none">The last Approval History record was Approved.The <i>Override Approval</i> button will be visible and enabled if:<ul style="list-style-type: none">The last Approval History record was Approved. <p>Note: The Supervisor will be able to override the Safety Assessment approval if affiliated to the County identified in the Request Approval panel.</p>
4	<p>In the <i>Approve Safety Assessment</i> panel.</p> <ul style="list-style-type: none">Click the Override Approval button.The <i>Override Safety Assessment Approval</i> panel displays.
5	<p>In the <i>Override Safety Assessment Approval</i> panel.</p> <ul style="list-style-type: none">The Overridden By field displays the <i>Signed On User Name on Current Date Current Time</i>. This field cannot be changed.Comments are required for an Override.<ul style="list-style-type: none">Click in the Comments field.Enter Comments.Click Submit.



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6	<p>In the <i>Safety Assessment Approval</i> pop-up window.</p> <ul style="list-style-type: none">• The <i>Safety Assessment Approval History</i> table is refreshed to include the Override information.• The <i>Request Safety Assessment Approval</i> panel will be visible and enabled.• The <i>Approve Safety Assessment</i> panel will be hidden.• The <i>Override Approval</i> button will be hidden.
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