LS/CMI and YLS/CMI help file

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Introduction

Welcome

Welcome to the MHS Offender Assessment System. This is a web-based application that allows you to administer and score the LS/CMI (and the LSI-R:SV) and the YLS/CMI 2.0 (and the YLS/CMI:SRV).

If you are just getting started, we suggest you follow all the basic tasks in order, starting with Workflow Overview, Overview of the Main Screen, and Overview of the Menu. There, you will obtain a brief introduction of what the system has to offer before beginning any tasks.

Once you have reviewed this part, you can access a particular topic by browsing to it using the table of contents on your left.

Workflow overview

The first time you log in to the MHS Offender Assessment System, your workflow process will generally follow these steps:

1. Fill in your contact information and change your password, if you like.
2. Define Zones, Regions, and Sub-Groups.
3. Determine whether you want to customize Criminogenic Needs, Non-Criminogenic Needs, Intervention Categories, Intervention Names, Offenses, Contact Levels, Cutoffs, Case Management Strategies, and/or Program/Placement Decisions.
4. Create user accounts for the people under your supervision who will be completing LS/CMI or YLS/CMI 2.0 assessments.
5. Create offender files for the offenders you will be assessing.
6. Complete LS/CMI (or LSI-R:SV) or YLS/CMI 2.0 (or YLS/CMI:SRV) assessments and generate reports.

Please refer to the User's Manual for specific instructions regarding completing specific parts of the LS/CMI or YLS/CMI 2.0 assessment.

Overview of the main screen

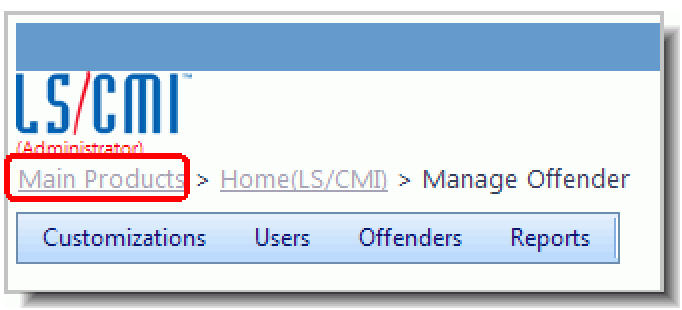
When you first log in to the MHS Offender Assessment System, you start at the Main Products page.

To select a product

- Click the product you wish to use: the **LS/CMI** (or LSI-R:SV) or the **YLS/CMI 2.0** (or YLS/CMI:SRV).

  Once you select your product, you will be able to access all the options and functions of the LS/CMI (or LSI-R:SV) and YLS/CMI 2.0 (or YLS/CMI:SRV) administration.

You can navigate back to the Main Products menu by clicking **Main Products** in the top left corner of any page.



You can move to previous pages by clicking the appropriate link at the top of the page.

Note that you **cannot** use the Back button within your internet browser to navigate through the MHS Offender Assessment System.

Overview of the menu bar

Every page in the LS/CMI and YLS/CMI 2.0 contains two menu bars at the top of the screen. These menus can be used to perform assessments and to make administrative changes.

Click the hotspots to learn more!

Instructions on how to use all these features are presented in this help file.

Help with administration

Administration information

Changing your contact information

It is important that you keep your contact information, particularly your email address, current. (An automatically generated email will be sent to this address one year after every assessment date to prompt you to remind your users to perform an assessment follow-up.)

To change your contact information

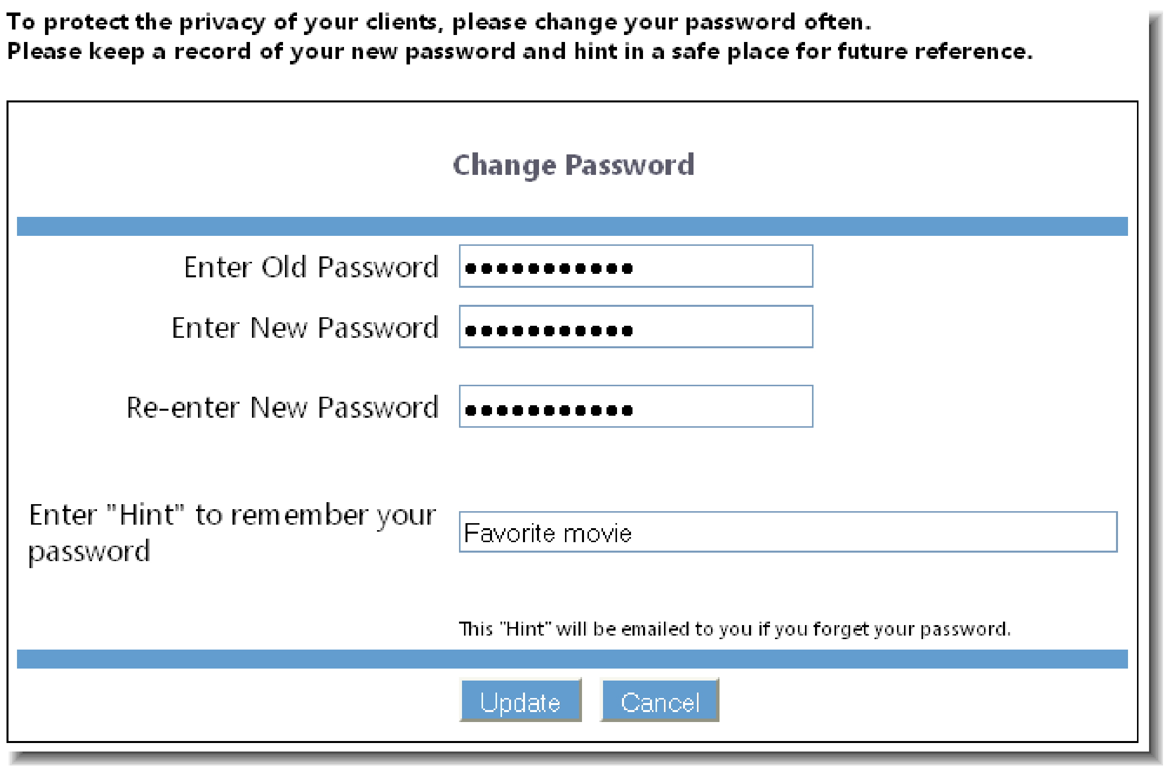
1. On the menu bar, hover your cursor over **Settings**. From the flyout menu, click **General Settings**. The Manage General Info page appears.
2. Type any required changes in the corresponding fields, then click **Save**.
3. A popup window will appear indicating that your changes have been made. Click **OK**.

Changing your password

It is a good idea to change your password periodically.

To change your password

1. On the menu bar, hover over **Settings**. From the flyout menu, click **Security Settings**.
2. On the Change Password screen, type your old password and your new password. Also, be sure to type a hint that will help you remember your new password. This hint will be sent to you at the email address stored in your contact info page if you forget your new password.



3. Click **Update** to save your changes.

   If the Old Password you entered is not correct and/or if the New Passwords do not match each other, you will be notified in red text on the screen. Re-enter the required information, taking care to enter it correctly, then click **Update**.

Changing your account information

You can change administrative options associated with your account, including the format of the Offender's ID.

To change your account information

1. On the menu bar, hover your cursor over **Settings**. From the flyout menu, click **Account Settings**. The Manage Account Info page appears.
2. Select your preferences for Autofill and Tracking by clicking the appropriate button.
    - Autofill allows reassessments to be automatically filled with the previous assessment's answers. If autofill is not enabled, the reassessment will be blank when a user starts a reassessment.
    - Tracking allows viewers to view tracking reports (assuming they have the rights to tracking report access). If tracking is not enabled, users will be unable to view tracking reports even if they have the access rights.
3. Type zeros (0) in the ID Format text box to indicate the number of digits required for the Offender ID (e.g., type six zeros [000000] to specify six-digit offender IDs). If you use alpha-numeric IDs, include the letters in the field (e.g., TDJ0000).
4. Click **Save**. A popup window will appear indicating that your changes have been made. Click **OK**.

Locations

Setting up locations

Locations are set up using up to three separate tiers: Zone, Region, and Subgroup. Users and offenders can then be assigned to a specific location. You must set all three tiers in order to designate a location to a user or offender.

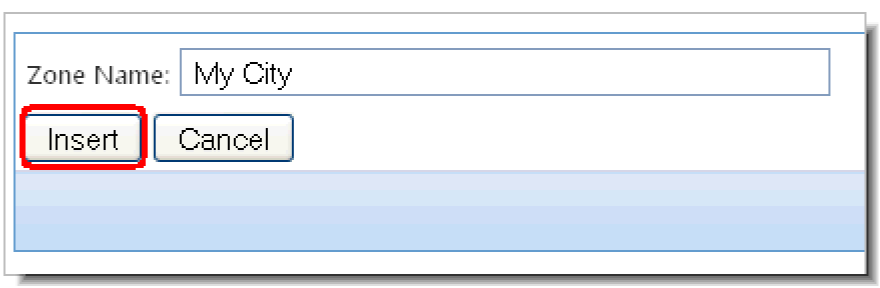
Here are two examples of how locations might be set up to be most useful within your organizational context:

Zone	Region	Subgroup
State	City	Facility
Facility	Ward	Supervisor

Establishing a zone is the first step.

To set up a new zone

1. On the menu bar, hover your cursor over **Location Setup**. From the flyout menu, click **Zones**. The Zone Management screen appears
2. Click **Add New Zones**.
3. Type a zone name in the text field.
4. Click **Insert** to add the new zone to the list of zones. You return to the Zone Management page, where your new zone appears in the Zone Name list.



5. Click **Save & Exit**.

To set up a new region

1. From either the Main Products page or the home page of a specific product, hover your cursor over **Location Setup**. From the flyout menu, click **Regions**. The Region Management screen appears.
2. Click **Add New Regions**.
3. From the Zone Name drop-down list, select the zone that the new region falls under.
4. Type a region name in the text field.
5. Click **Insert** to add the new region to the zone you selected in step 3, above. The new region now appears in the Region Name column beside the applicable zone on the Region Management page.
6. Click **Save & Exit**.

To set up a new sub-group

1. From either the Main Products page or the home page of a specific product, hover your cursor over **Location Setup**. From the flyout menu, click **Sub-Groups**. The Sub-Groups Management screen appears.
2. Click **Add New Sub-Groups**.
3. From the Zone > Region Name drop-down list, select the zone and region that the new sub-group falls under.
4. Type a sub-group name in the text field.
5. Click **Insert** to add the new sub-group to the zone and region you selected in step 3, above. The new sub-group now appears in the Sub-Group column beside the applicable zone and region on the Sub-Groups Management page.
6. Click **Save & Exit**.

These new Zones, Regions, and Sub-Groups will now be available to assign to new or existing users and offenders.

Managing uses

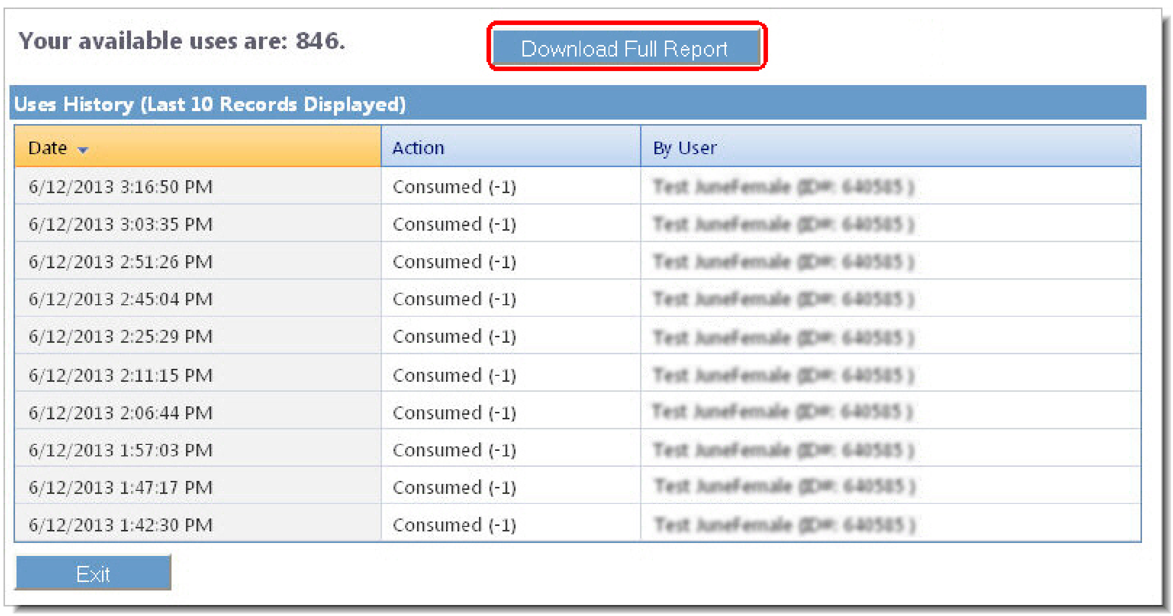
Tracking uses

The MHS Offender Assessment System helps you keep track of the uses that you have purchased and consumed (i.e., spent or deducted; one use is consumed every time you score an assessment).

To view your uses history

- On the menu bar, hover your cursor over **Uses**. From the flyout menu, click **LS/CMI Uses**, **LSI-R:SV Uses**, **YLS/CMI 2.0 Uses**, or **YLS/CMI:SRV Uses.**

  The last 10 records in your uses history are displayed.


Your available uses are: 846.

Download Full Report

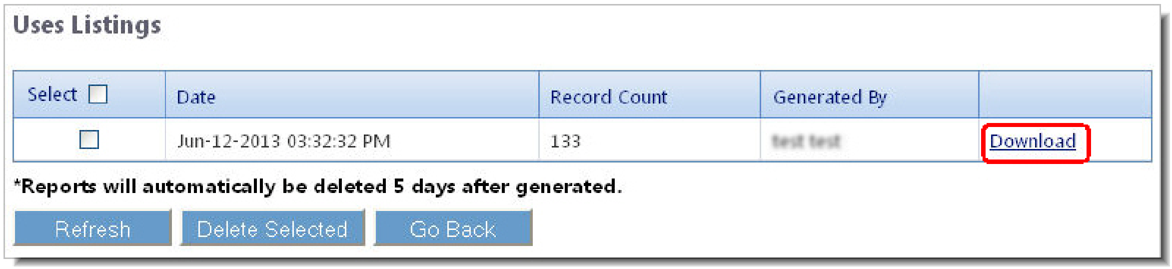
Uses History (Last 10 Records Displayed)

Date	Action	By User
6/12/2013 3:16:50 PM	Consumed (-1)	Test Junefemale (ID#: 640585)
6/12/2013 3:03:35 PM	Consumed (-1)	Test Junefemale (ID#: 640585)
6/12/2013 2:51:26 PM	Consumed (-1)	Test Junefemale (ID#: 640585)
6/12/2013 2:45:04 PM	Consumed (-1)	Test Junefemale (ID#: 640585)
6/12/2013 2:25:29 PM	Consumed (-1)	Test Junefemale (ID#: 640585)
6/12/2013 2:11:15 PM	Consumed (-1)	Test Junefemale (ID#: 640585)
6/12/2013 2:06:44 PM	Consumed (-1)	Test Junefemale (ID#: 640585)
6/12/2013 1:57:03 PM	Consumed (-1)	Test Junefemale (ID#: 640585)
6/12/2013 1:47:17 PM	Consumed (-1)	Test Junefemale (ID#: 640585)
6/12/2013 1:42:30 PM	Consumed (-1)	Test Junefemale (ID#: 640585)

Exit

To generate a spreadsheet report of your full uses history

1. From the Uses page, click **Download Full Report**. After the report has finished processing, a Download link appears.



2. Click the **Download** link. The File Download dialog box opens.
3. Select **Open with** to launch Excel and view the report immediately, or select **Save File** to save the file to a location on your computer.

The report will be available for download from the Uses Listings page for five days, after which time it will be deleted. A new report can be generated at any time at no charge by following the above procedure.

Purchase uses

When you view your uses history, you get a current update of how many uses you have available for the selected assessment.

To order additional LS/CMI, LSI-R:SV, YLS/CMI 2.0, or YLS/CMI:SRV uses

Please contact MHS:

Email: customerservice@mhs.com

Phone:

- From U.S.: 1-800-456-3003
- From Canada: 1-800-268-6011
- International: +1-416-492-2627

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Customizations

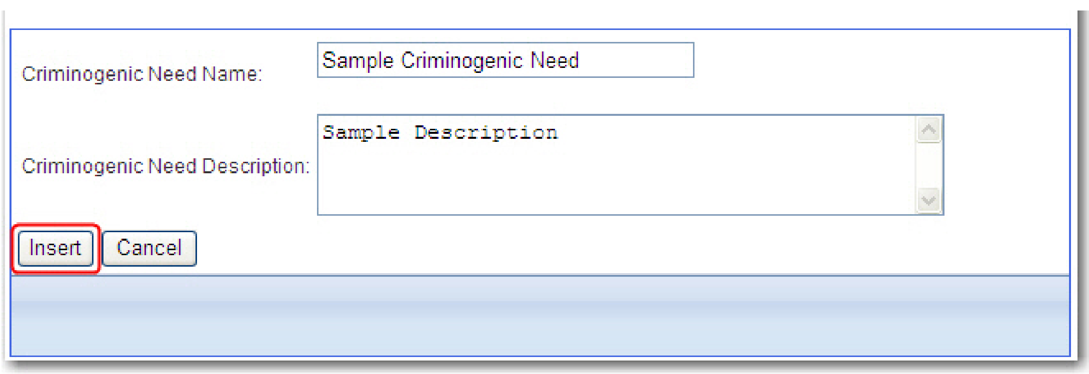
Customizing criminogenic needs

The LS/CMI has 8 default Criminogenic Needs, and the YLS/CMI 2.0 has 8; none of which can be edited or deleted. However, new criminogenic needs can be added to the online program.

All default and customized criminogenic needs are available for selection from the Case Management portions of the LS/CMI and the YLS/CMI 2.0.

To add a new criminogenic need

1. On the menu bar, hover your cursor over **Customizations**. From the flyout menu, select **Criminogenic Needs**.
   The Criminogenic Needs Management page appears.
2. Review the default list of criminogenic needs to ensure that the new criminogenic need does not already exist.
3. Click **Add New Criminogenic Needs**.
4. Type a new criminogenic need name and a description in the appropriate text boxes, then click **Insert**.



You return to the Criminogenic Needs Management page where the new criminogenic need and its description now appear at the end of the list.

5. Click **Save & Exit** to save your changes.

Customizing non-criminogenic needs

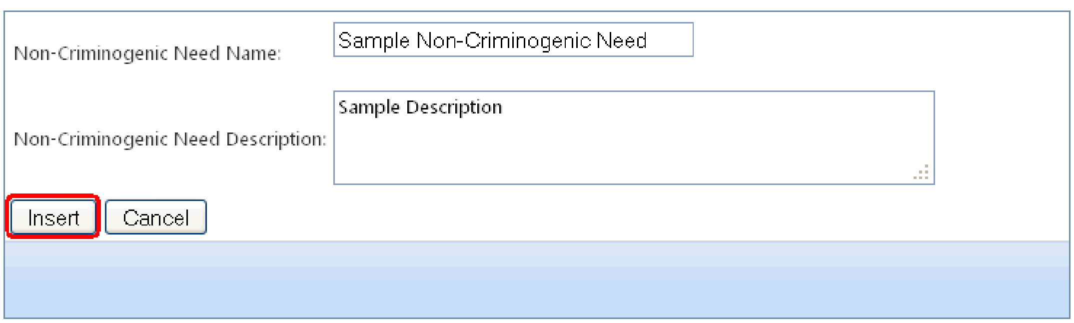
This feature is only available in the YLS/CMI 2.0. It is not available in the LS/CMI.

In addition to criminogenic needs, you can also customize non-criminogenic needs in the YLS/CMI 2.0.

The YLS/CMI 2.0 has 56 default non-criminogenic needs, none of which can be edited or deleted. However, new non-criminogenic needs can be added, edited, or deleted.

To add a new non-criminogenic need

1. On the menu bar of the YLS/CMI 2.0, hover your cursor over **Customizations**. From the flyout menu, select **Non-Criminogenic Needs**.
   The Non-Criminogenic Needs Management page appears.
2. Review the list of non-criminogenic needs to ensure that the new non-criminogenic need does not already exist.
3. Click **Add New Non-Criminogenic Need**.
4. Type a new non-criminogenic need name and a description in the appropriate text boxes, then click **Insert**.



You return to the Non-Criminogenic Needs Management page where the new non-criminogenic need and its description now appear at the end of the list.

5. Click **Save & Exit** to save your changes.

Customizing intervention categories

This feature is only available in the LS/CMI. It is not available in the YLS/CMI 2.0.

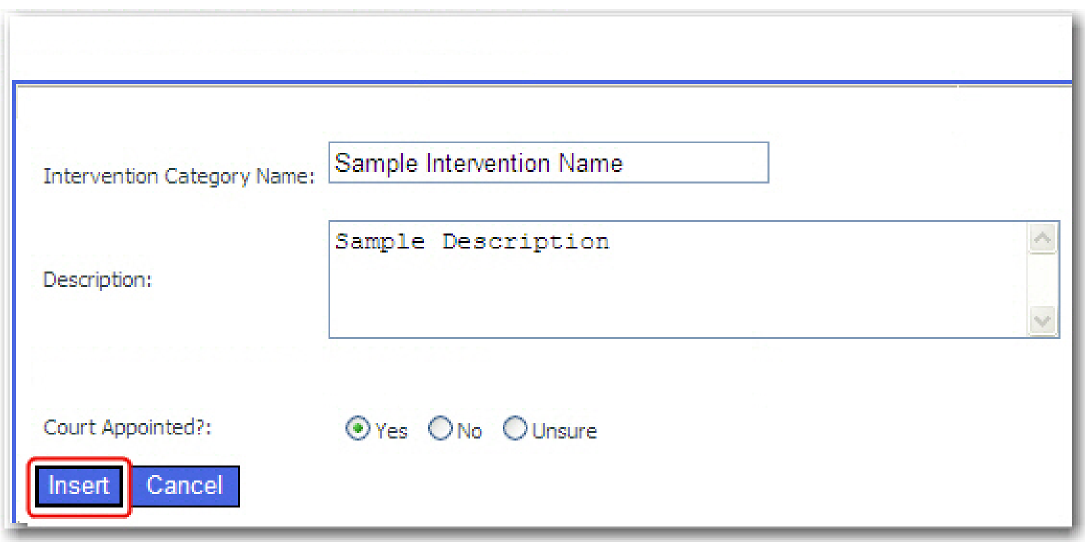
Intervention Categories are available for selection from the Case Management portions of the LS/CMI. There are 24 default Intervention Categories, the names and descriptions of which cannot be edited or deleted (although the Court Appointed status of any default or custom Intervention category can be changed). Custom intervention categories can be edited and deleted.

To add a new intervention category

1. On the menu bar of the LS/CMI, hover your cursor over **Customizations**. From the flyout menu, select **Intervention Categories**.
   The Intervention Categories Management page appears.
2. Review the default list of intervention categories to ensure that the new Intervention Category does not already exist.

You may wish to duplicate intervention categories to apply a different court-appointed status to each e.g., Education (Court-appointed); Education (Not court-appointed).

3. Click **Add New Intervention Category**.
4. Type a new intervention category name and a description in the appropriate text boxes. Specify if the intervention is court appointed by clicking on the appropriate radio button, then click **Insert**.



You return to the Intervention Categories Management page, where the new intervention category now appears at the end of the list.

5. Click **Save & Exit**.

Customizing intervention names

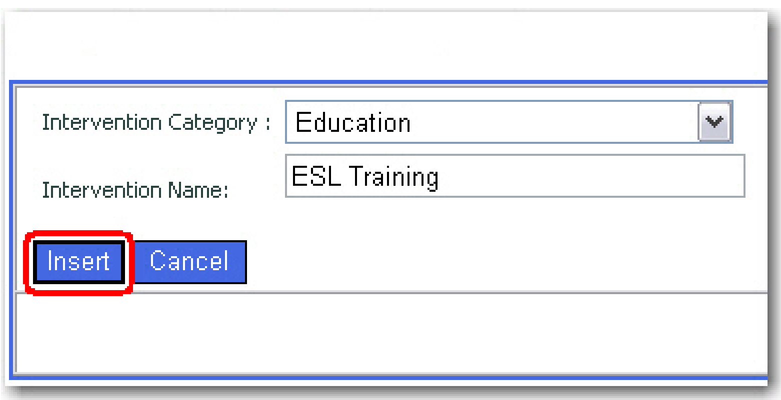
This feature is only available in the LS/CMI. It is not available in the YLS/CMI 2.0.

Intervention Names are associated with specific Intervention Categories. Because there are no default Intervention Names, all of them can be edited or deleted.

New Intervention Names and their associated Intervention Categories are available for selection from the Case Management portions of the LS/CMI.

To add a new intervention name

1. On the menu bar of the LS/CMI, hover your cursor over **Customizations**. From the flyout menu, select **Intervention Names**.
   The Intervention Names Management page appears.
2. Review the list of existing intervention names (if any) to ensure that the new intervention name does not already exist.
3. Click **Add New Intervention Names**. The Intervention Names Management page appears.
4. From the Intervention Category drop-down list, select the intervention category to which you wish to associate the new intervention name.
5. Type a new intervention name in the text box, then click **Insert**.



You return to the Intervention Names Management page where the new intervention name appears beside its associated intervention category at the end of the list.

6. Click **Save & Exit**.

Customizing offences

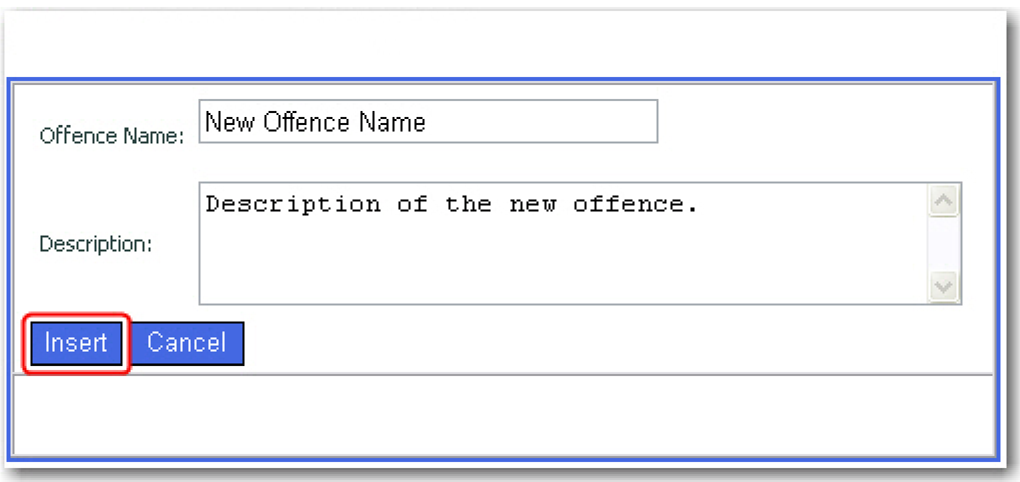
This feature is only available in the LS/CMI. It is not available in the YLS/CMI 2.0.

There are 35 default Offences listed in the LS/CMI Online, none of which can be edited or deleted. However, new offences can be added to the online program.

Default and customized offences are available for selection from the offender's Assessment History (Part B.2.1).

To add a new offence

1. On the menu bar of the LS/CMI, hover your cursor over **Customizations**. From the flyout menu, select **Offences**. The Offence Management page appears.
2. Review the default list of offences to ensure that the new offence does not already exist.
3. Click **Add New Offence**.
4. Type an offence name and a description in the appropriate text boxes, then click **Insert**.



You return to the Offence Codes Management page where the new offence appears at the end of the list.

5. Click **Save & Exit**.

Customizing contact levels

This feature is only available in the YLS/CMI 2.0. It is not available in the LS/CMI.

Contact Levels are available for selection from the Assessment portions of the YLS/CMI 2.0. Default Contact Levels cannot be edited or deleted, but new Contact Levels can be edited and deleted.

To add a new contact level

1. On the menu bar of the YLS/CMI 2.0, hover your cursor over **Customizations**. From the flyout menu, select **Contact Levels**. The Contact Level page appears.
2. Review the list of contact levels to ensure that the contact level does not already exist.
3. Click **Add New Contact Level**.
4. Type a new contact level name and a contact level description in the appropriate text boxes, then click **Insert**.

   You return to the Contact Level page where the new contact level appears at the end of the list.
5. Click **Save & Exit**.

Customizing user-defined cutoffs

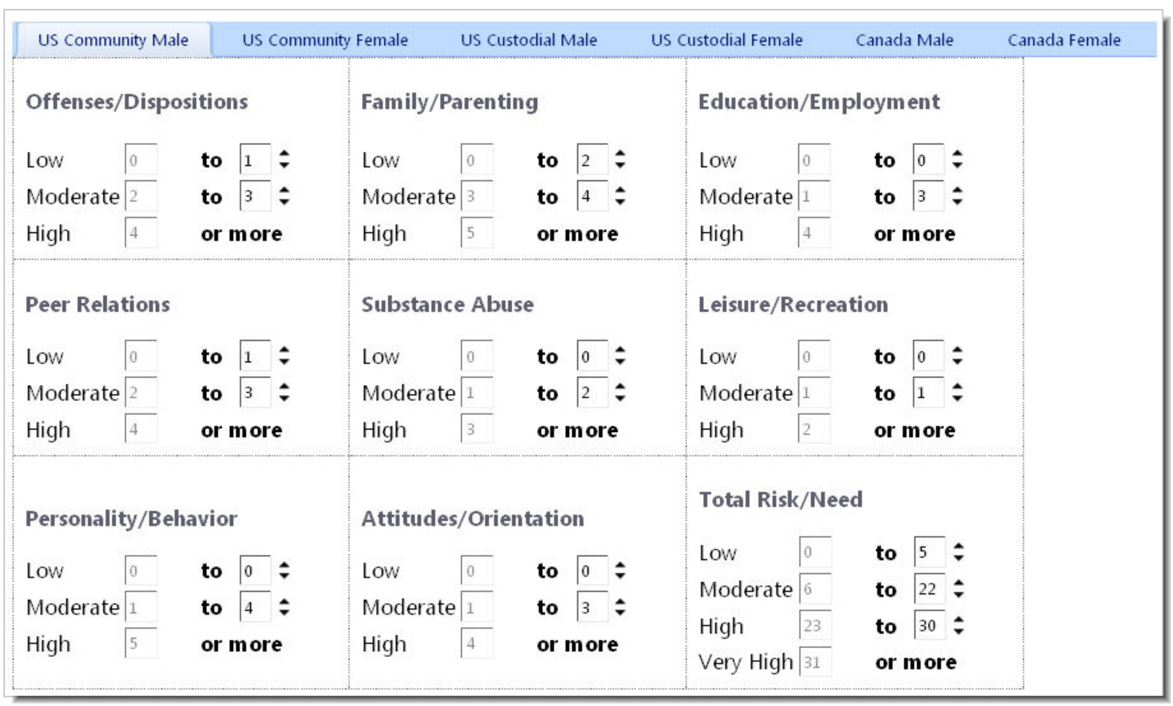
This feature is only available in the YLS/CMI 2.0. It is not available in the LS/CMI.

The YLS/CMI 2.0 has default standard cutoff scores that are used to determine the risk level for each area of assessment. These cutoff scores can be easily adapted by the user to suit individual needs.

To customize a user-defined cutoff

1. On the menu bar of the YLS/CMI 2.0, hover your cursor over **Customizations**. From the flyout menu, select **Cutoffs**.
   The Case Management Setup page appears.
2. Click on the tabs at the top of the screen to toggle between user-defined cutoff scores for males and females in different settings.
3. Click the arrow buttons or enter the text in the available boxes to select the appropriate cutoff score range for each area of assessment.

   The cutoff score ranges for the subsequent levels will automatically update depending on the values you enter.



4. Click **Save & Exit**.

Case management setup - Criminogenic needs

This feature is only available in the YLS/CMI 2.0. It is not available in the LS/CMI.

The YLS/CMI 2.0 allows you to set rules for demographic filters and other case elements regarding criminogenic needs. These rules can then be used to pre-fill the table elements in Part 6.1 of the Case Management Plan.

To add a new case management rule

1. On the menu bar of the YLS/CMI 2.0, hover your cursor over **Customizations**. From the flyout menu, select **Case Management Setup - Criminogenic Needs**.

   The Case Management Criminogenic Needs setup page appears.

2. Click **Add New Case Management**. The Case Management selection boxes appear.
3. Select the required filters for each category by choosing from the drop-down menus or clicking the desired check boxes.

   Gender, Age, Offender Classification, Setting, Subcomponent, **Risk Level**. **Intervention**, **Duration**, and **Intensity** are required fields.

   For **Goal** and **Intervention**, type your text in the appropriate text boxes.

   Select the **Duration** and **Intensity** that applies to the case management rule by choosing from the drop-down menus.

4. Click **Insert**.

   The new case management rule is now listed on the Case Management Criminogenic Needs setup page.

5. Click **Save & Exit** to save your changes.

Managing users

Creating a new user account

As the administrator, you have the ability to create and modify users.

A user is an account that you create in the database that uniquely identifies those people who will be administering the LS/CMI or YLS/CMI 2.0. You should create a user for each individual who will be administering the LS/CMI or YLS/CMI 2.0 in your organization.

If you have not already done so, you may wish to set up Locations before creating users; in this way, the geographical and organizational locations of your users will already be available to associate with each new user account that you create in this step.

To create a new user account

1. From the menu bar of a product, hover your cursor over **Users**. From the flyout menu, click **Users Management**. The User Listing page appears.
2. Click **Add New User**.
3. Fill in the fields for the new user account that you are creating, as follows:

General Information

With the exception of Primary Location, all of the General Information fields are required to set up a new user.

Type the new user's First and Last names, and email address.

Type an ID for the new user. You will receive a notification if you type an ID that you have already assigned to another user. This ID can be any identifier you choose to further distinguish this user from others.

The **Group ID** cannot be edited, but is part of the new user's login information.

All of the new users you set up will have the same Group ID, but you will assign each new user a unique **Password**. You will receive an error notification if you type a password that you have already assigned to another user.

Select the new user's **Primary Location** from the drop-down list.

Ensure that the new user's **Status** is set to **Active**.

Access Options

Here you will define permissions for this new user. Click to expand the topic trees and view the available permissions options.

Click to place a checkmark beside each task that you wish to allow this new user to perform from his or her account.

Location

Each location that you have already set up (see Setting Up Locations for more information) is available in the Locations part of this page. Here, the locations that you select will be available to the new user (i.e., the new user will be able to view offender files for offenders assigned to these locations).

About **Supervisor Rights**:

- Check **Yes** to allow the new user to view offender information created by all users in the locations you allow in Locations (for example, you would allow a user in a more supervisory role this permission).
- Check **No** to allow the new user to view only their own offender files for the selected locations.

Click  to expand the topic trees and view Locations.

Click to place checkmarks next to the Locations that this user can access. (Click in the **Check All Locations** check box to give the new user permissions for all locations.)

4. Click **Save** to save the new user. A dialog box opens informing you that the new user has been created.
5. Click **OK**. You return to the User Listing page.

Editing a user account

As the administrator, you have the ability to edit user accounts.

To edit a user account

1. From the menu bar of a product, hover your cursor over **Users**. From the flyout menu, click **Users Management**. The User Listing page appears.
2. Click the edit icon beside the user account you want to modify.
3. Make your changes to the text boxes. To enable or disable options, select or deselect the appropriate check box.
4. Click **Save** to save your changes. A dialog box opens informing you that the user has been modified.
5. Click **OK**. You return to the User Listing page.

Generating a user list

The User List is a an MS Excel® spreadsheet list of all your user accounts.

The spreadsheet includes the following information about each user account:

- First Name
- Last Name
- ID
- Email Address
- Status
- Primary Location
- Rights
- Date Created
- Added By

To generate a spreadsheet list of users in your account

1. From the menu bar of a product, hover your cursor over **Users**. From the flyout menu, click **Users Management**. The User Listing page appears.
2. Click **Search for a User**. The System Access Set-up page appears.
3. Click **Download Full Report**.

   After the report has finished processing, a Download link appears in the report row.

4. Click the **Download** link. The File Download dialog box opens.
5. Click **Open** to launch Excel® and view the report immediately, or click **Save** to save the file to a location on your computer.

Managing offenders

Introduction to offender management

The Offender Management level is where each offender's files are organized.

Several different functions are accomplished within the Offender Management pages of the LS/CMI and the YLS/CMI 2.0.

At this level, you can

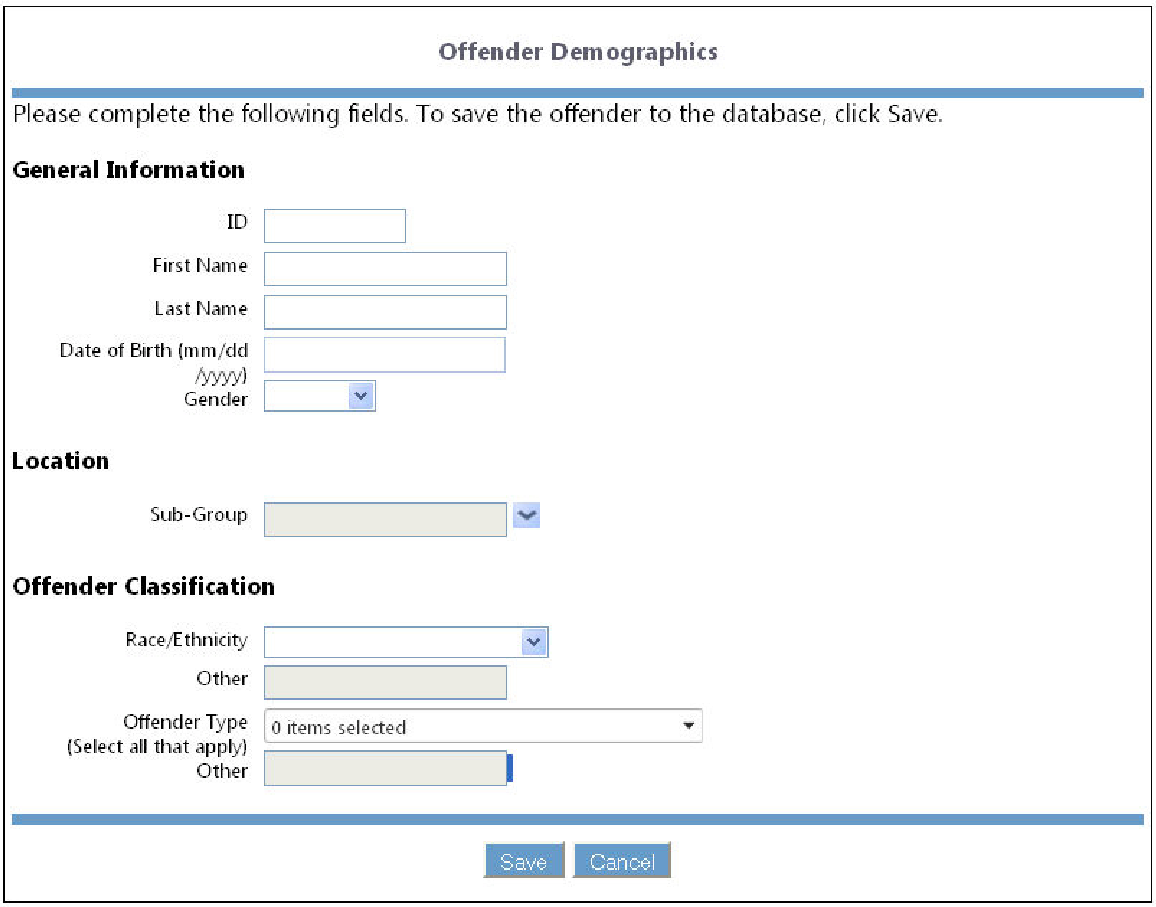
- set up new offenders, search for existing offenders and generate offender lists.
- complete new LSI-R:SV, LS/CMI, YLS/CMI 2.0, and YLS/CMI:SRV assessments
- complete Follow-up forms and the Offender History.

Adding a new offender file

Before conducting an assessment, an offender file must be selected.

To add a new offender

1. From the menu bar, hover your cursor over **Offenders**. From the flyout menu, click **Offender Management**. The Offender Listing page appears.
2. Click **Add New Offender**.
3. Complete the boxes on the Offender Demographics page.



4. Select the location to which the offender belongs. Click to expand the topic tree and view the Locations. (Learn how to set up locations here.)
5. Click **Save**. The Offender Summary page opens.
6. Click **OK** to add the new offender file. The Offender Listing page appears, displaying the new offender file.

Importing a list of offenders

As an alternative to adding offenders one-at-a-time, you can upload a list of multiple offenders.

To import a list of offenders

1. From the menu bar, hover your cursor over **Offenders**. From the flyout menu, click **Offender Management**. The Offender Listing page appears.
2. Click **Import Offender List**. The Import Offenders page appears.
3. Click **Here**. The File Download dialog box appears.
4. Click **Open** to launch Excel® and view the Import Template immediately, or click **Save** to save the file to a location on your computer.
5. Click the **Offender Data** tab on the spreadsheet and enter the data into the required fields. For instructions, click the **Import Instructions** tab. For an example of a completed spreadsheet, click the **Sample Data** tab.
6. When you are finished, save the completed spreadsheet and click **Select** on the Import Offenders page. The Open File dialog box appears.
7. Locate the spreadsheet in the dialog box and click **Open**.
8. Select an **Import Type** from the drop-down menu: **Insert** or **Update**.
9. Click **Import** on the Import Offenders page. A confirmation message appears, indicating that the data has been successfully imported.

Searching for an offender file

In order to perform any specific LS/CMI or YLS/CMI 2.0 assessment actions, you must first select a specific offender file.

After offenders have been added to your database, you can conduct a search for any of their records.

To locate an offender file

1. From the menu bar, hover your cursor over **Offenders**. From the flyout menu, click **Offender Management**. The Offender Listing page appears.
2. Click **Search for an Offender**. The Offender Management screen appears.
3. Enter any or all of the search parameters, including the offender's First Name, Last Name, identification number, and/or the Location to which the offender was assigned, then click **Search**. (If you click Search without entering any information, all offender files in your system, up to a maximum of 500 records, will be displayed.) The Offender Listing page appears.

All offender files in your database that match the search criteria (up to a maximum 500 records) will be displayed.

See also Creating a New Offender File.

Generating an offender list

Offender Listing allows you to download a list of all offender files created by you and your users in an MS Excel® spreadsheet. You can save this list onto your own computer for easy access and print it at anytime.

(Note that offender lists cannot be filtered by location.)

To generate a spreadsheet list of offenders

1. From the menu bar, hover your cursor over **Offenders**. From the flyout menu, click **Offender Management**. The Offender Listing page appears.
2. Click **Search for an Offender**. The Offender Management screen appears.
3. Click **Download Full Report**.

   After the report has finished processing, a Download link appears in the report row.

Select ☐	Date	Record Count	Generated By	
☐	May-22-2012 02:26:19 PM	32	test test	Download

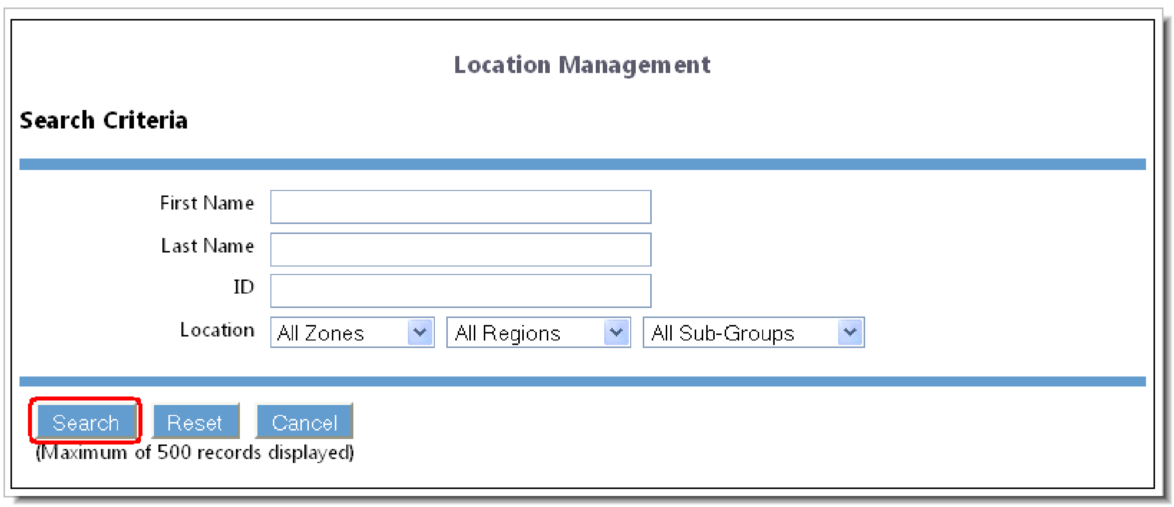
4. Click the **Download** link. The File Download dialog box opens.
5. Click **Open** to launch Excel® and view the report immediately, or click **Save** to save the file to a location on your computer.

Changing the offender's location

On occasion you might need to change the location for a large number of offenders at once. Rather than individually editing the details for each offender, you can move their location using the Location Management page.

To change an offender's location

1. From the menu bar, hover your cursor over **Offenders**. From the flyout menu, click **Location Management**. The Location Management page appears.
2. Enter any or all of the search parameters, including the offender's First Name, Last Name, identification number, and/or the current Location.
3. Click **Search**.



All the offender files in your database that match the search criteria are displayed in a list.

4. Select the offenders you wish to move by clicking the adjacent check box. To select all the offenders, click the **Select All** check box.
5. Click **Update Location**. The Location page appears.
6. Specify the location to move the offenders to by selecting it from the **Location** drop-down menu.
7. Click **Update**.

All of the selected offenders are now associated with the new location.

Reports

Report types

Profile Reports provide security classification information based on the overall assessment score and detailed results from LS/CMI (Sections 1-8) and YLS/CMI 2.0 (Parts 1-5) assessments.

Comparative Reports compare the results of between two and four assessments for the same offender. Results are useful for determining risk/need changes over time.

Case Management Reports summarize any recommended treatment strategies to address the offender's unique set of needs. They provide an administrative summary of the criminogenic and non-criminogenic needs of the offender and list special responsivity considerations and include a discharge summary where applicable, which describes the offender's status at the time of discharge along with recommendations for the future. A progress log provides a record of activities designed to measure changes in the individual's situation that result from case management strategies.

Follow-Up Reports summarize any behaviors relevant to an offender's case management subsequent to their initial LS/CMI or YLS/CMI 2.0 assessment. They provide important information on incidents such as breaches of parole/probation, institutional infractions, and release from correctional supervision. This information may be used to monitor, evaluate, and validate offender placement decisions.

Aggregate Reporting

The aggregate report provides an item-level data spreadsheet for any and/or all offenders at the user's location. These data list responses from the following areas:

LS/CMI Aggregate Report	YLS/CMI 2.0 Aggregate Report
Demographic information	Demographic information
LS/CMI Parts 1-6, 8, 9, & 11	YLS/CMI 2.0 Parts 1, 3, 4, 5, & 6
LS/CMI Follow-up	YLS/CMI 2.0 Follow-up
LSI-R:SV data	YLS/CMI:SRV data

This spreadsheet allows the user to perform customizable data analyses on LS/CMI and LSI-R:SV (and YLS/CMI 2.0 and YLS/CMI:SRV) data.

Tracking Reporting

The Tracking reports are information logs about actions taken and transactions made in your account by your users. There are two types of Tracking reports:

- The **User Log** report is a log sorted by user that details the activities of your users.

- The **Offender Log** report is a log sorted by offender that details the activities related to these offenders.

Generating LS/CMI and YLS/CMI 2.0 reports

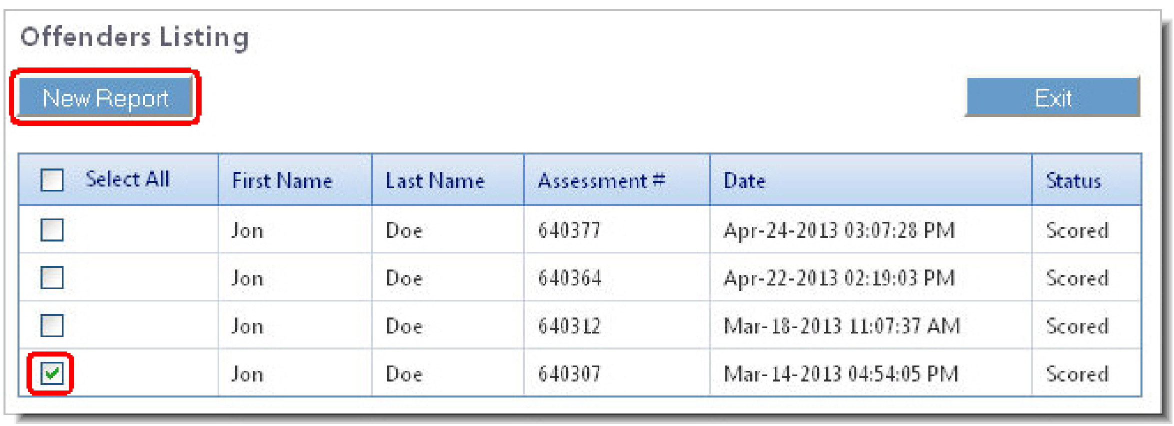
Reports can be generated for any LS/CMI or YLS/CMI 2.0 assessment where Part 1 has been completed and scored.

Reports appear in .pdf format.

To generate a profile, comparative, case management, or follow-up report

1. From the menu bar, hover your cursor over **Reports**. From the flyout menu, hover your cursor over the type of report you want to generate, then click to select **Create New Report**.
2. Type search criteria to find the offender for whom you wish to generate the report, then click **Search**. The Offenders Listing page opens. Note that only offenders who have assessments of the type you selected in step 1 are listed.
3. Click in the check box to select the offender for whom you wish to generate a report, then click **New Report**.

   Note: For the comparative report, you must first select the offender, and then select a minimum of 2 and a maximum of 4 assessments to compare before clicking **New Report**.



After the report has finished processing, a Download link appears. The new report is generated, and appears at the top of the list of reports that have been generated in the past 5 days.

4. Click the **Download** link to open the report. The File Download dialog box opens.
5. Click **Open** to view the report, or **Save** to save the report to a location on your computer.

Reports that you generate are available from this list of reports for 5 days. It is recommended that you save the reports you generate to a location on your computer.

Generating aggregate reports

Aggregate Reports are available for both the LS/CMI and YLS/CMI 2.0 and are described here.

To generate an Aggregate report

1. From the menu bar, hover your cursor over **Reports**. From the flyout menu, hover your cursor over **Aggregate Report**, then click to select **Create New Report**. The Aggregate Report screen appears.

To generate an Aggregate report for all the offenders for which you have permissions:

2. The All Offenders radio button is selected by default. Click **Next**. After the report has finished processing, a Download link appears. The new aggregate report is generated, and appears at the top of the list of aggregate reports that have been generated in the past 5 days.

(Proceed to step 5, below.)

To generate an Aggregate report for all offenders within a specific month:

1.

2. Click the **Month-wise for all Offenders** radio button.
3. Select the month you want from the **Month** drop-down list.
4. Click **Next**. The new aggregate report is generated, and appears at the top of the list of aggregate reports that have been generated in the past 5 days.

   (Proceed to step 5, below.)

To generate an Aggregate report for a single offender or a group of selected offenders:

2. Click the **Selected Offenders** radio button.
3. Type search criteria to find the offender(s) for whom you wish to generate the report, then click **Next**. The Offenders Listing page opens.
4. Click in the checkbox(es) to select offender(s), then click **New Report**. The new aggregate report is generated, and appears at the top of the list of aggregate reports that have been generated in the past 5 days.

5. Click the adjacent **Download** link to open the report. The File Download dialog box opens.
6. Click **Open** to view the report, or **Save** to save the report to a location on your computer.

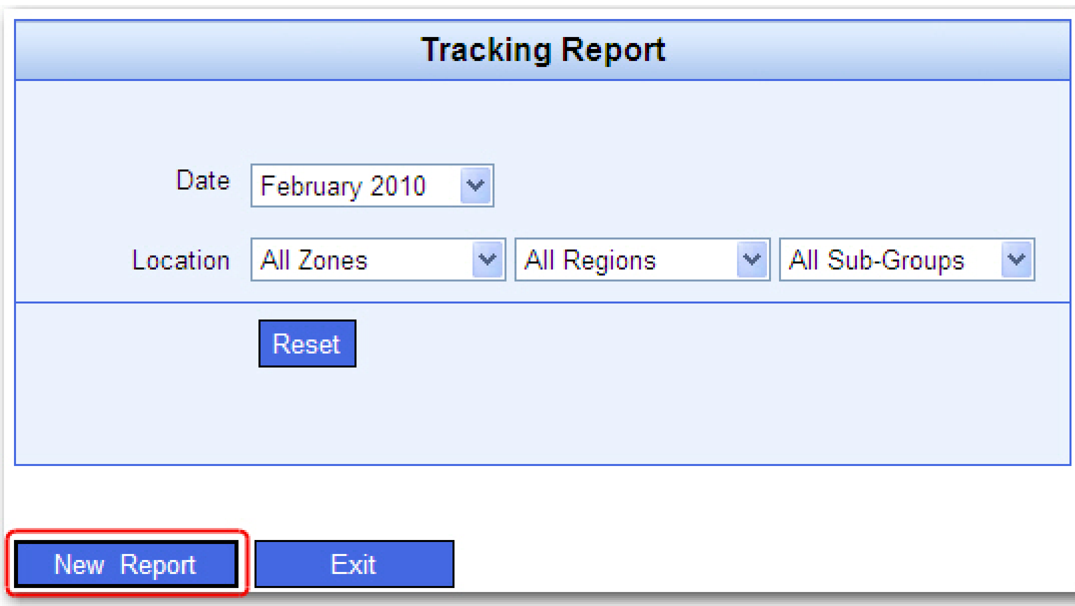
Reports that you generate are available from this list of reports for 5 days. It is recommended that you save the reports you generate to a location on your computer.

Generating tracking reports

Tracking Reports are available for the LS/CMI and the YLS/CMI 2.0 and are described here.

To generate a tracking report

1. From the menu bar, hover your cursor over **Reports**. From the flyout menu, hover your cursor over **Tracking Report**. Select whether you wish to create a **User Log** or an **Offender Log**, then click to select **Create New Report**. The Tracking Report screen appears.



2. Select the required **Date** and **Location** from the drop-down menus.
3. Click **New Report**. The new tracking report is generated, and appears at the top of the list of tracking reports that have been generated in the past 5 days.
4. Click the **Download** link to open the report. The File Download dialog box opens.
5. Click **Open** to view the report, or **Save** to save the report to a location on your computer.

Reports that you generate are available from this list of reports for 5 days. It is recommended that you save the reports you generate to a location on your computer.

View Reports

Reports that have been generated can be viewed for up to 5 days from the MHS Offender Assessment System.

To view a report

1. From the menu bar, hover your cursor over **Reports**. From the flyout menu, hover your cursor over the type of report you want to view, then click to select **View Existing Reports**. A list appears showing all the reports of the type you selected that have been generated in the past 5 days.
2. As described in Generating Reports, click the Download link to download a report, or click in the checkbox to delete the selected reports.

It is recommended that you save the reports you generate to a location on your computer.

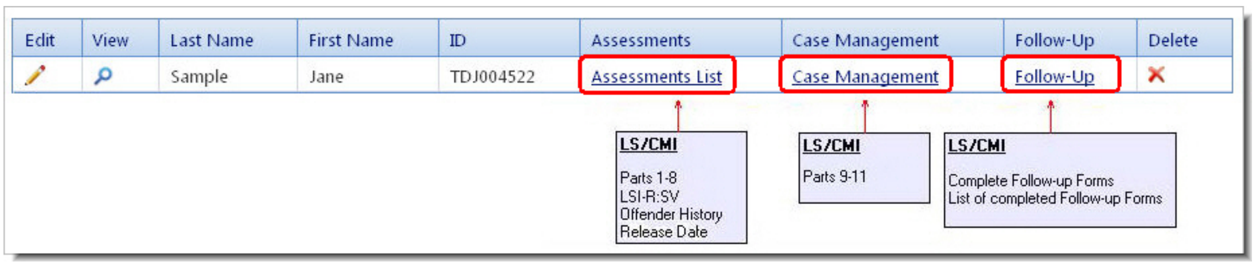
Help with assessments

LSCMI assessments

Assessment Overview

To complete an LS/CMI or LSI-R:SV, or to fill in an Offender History, Case Management, or Follow-up form for an offender, you first must find and select the offender file.

The following illustration shows the areas of Offender Management where each LS/CMI assessment task is done.



To begin a new assessment, click on the **Assessments List** for the relevant offender.

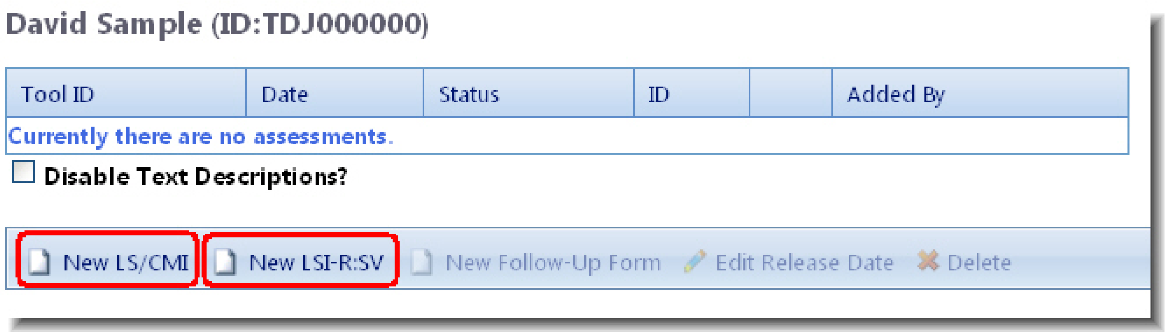
Selecting an assessment

If you are beginning an LS/CMI for a **new** offender file, you will be prompted to select an assessment type and complete the Offender History form.

To select an assessment type

1. From the LS/CMI menu bar, hover your cursor over **Offenders**. From the flyout menu, click **Offender Management**. The Offender Listing page appears.
2. Search for the applicable offender file.
3. Click on the **Assessments List** link for the relevant offender. The Assessments page appears.

   By default, the LS/CMI and LSI-R:SV assessment pages include a description "pane" that provides guidance for rating each item. However, if you do *not* want to view these text descriptions of each item, select the **Disable Text Descriptions** checkbox.
4. Click **New LS/CMI** (or **New LSI–R:SV**).



The Offender History Form appears.

If you have already completed the Offender History form, the Interviewer page appears.

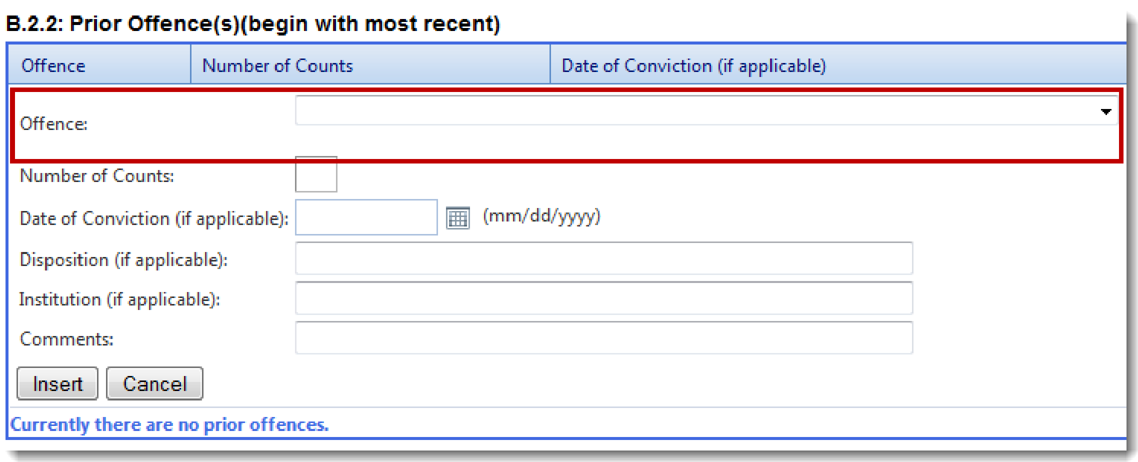
Completing the offender history form

The Offender History form stores valuable background information about the offender. This information can be edited at any time.

You are prompted to complete the Offender History form whenever you begin an LS/CMI for a new offender file.

To complete the offender history form

1. Fill in the text boxes on the Offender History page. Note that **Age**, **Gender**, and **Occupational Standing** are required fields.
2. To **Add New Offence(s)** to parts B.2.1 or B.2.2, the offence must first be specified in the Customizations > Offences menu. The offence will then be made available in the drop down menus for parts B.2.1 and B.2.2.

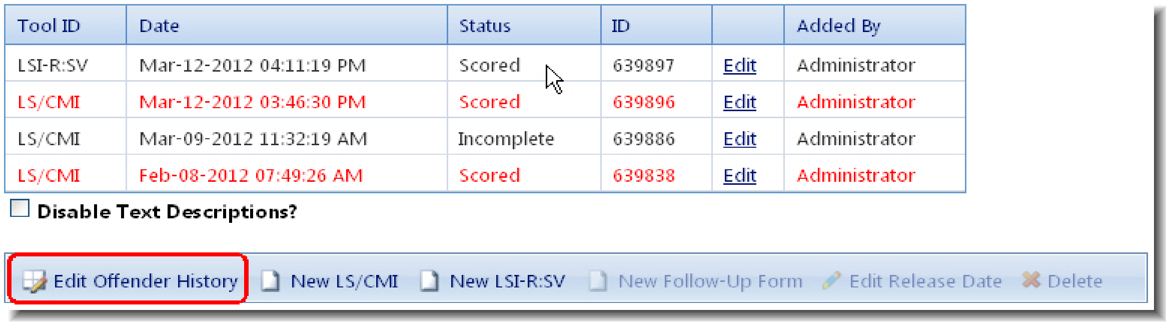


3. Click **New** to save the form.

   The Interviewer page appears.

To edit the offender history form

1. Click on the **Assessments List** link for the relevant offender. The Assessments page appears.
2. Click **Edit Offender History**.

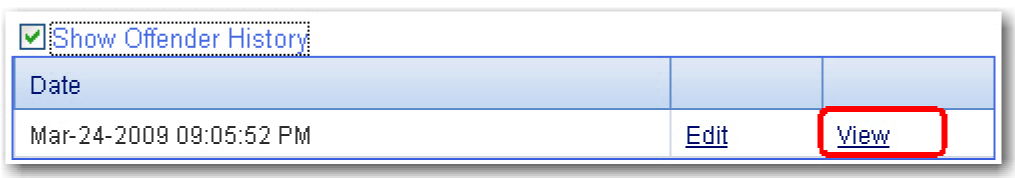


The Offender History page appears.

3. Make your changes to the text boxes.
4. When you are finished, click **Overwrite** to overwrite the existing offender history form, or click **New** to save the current offender history as a separate entry.

To view saved offender history forms

1. Click the **Show Offender History** checkbox at the bottom of the Assessments page.
2. Click **View** beside the history you wish to open.



Selecting the interviewer

After you save the Offender History form, the interviewer information page opens, pre-populated with date and time data. The Interviewer field contains the first and last name of the active user account.

To select the interviewer

1. Confirm the interviewer name, or type the name of a different interviewer in the text box.
2. Click **Next**. Part 1 of the LS/CMI appears.

Completing Part 1

If you are beginning an LS/CMI for a **new** offender file, you will be prompted to complete the Offender History form and confirm the interviewer.

After you confirm the interviewer, Part 1 appears.

To complete the LS/CMI Part 1

1. Answer each item on the page by clicking the **No**, **Yes**, or **Omit** button, and filling out the appropriate text boxes.

   For an explanation of any item, place your cursor over the item to highlight it. The explanation appears in the item description box on the right side of the screen.

   All items on this screen must be completed to continue to the next subcomponent. A running total of the number of omitted items and allowable omitted items appears at the bottom of each page. A maximum of 4 omitted items is allowed.

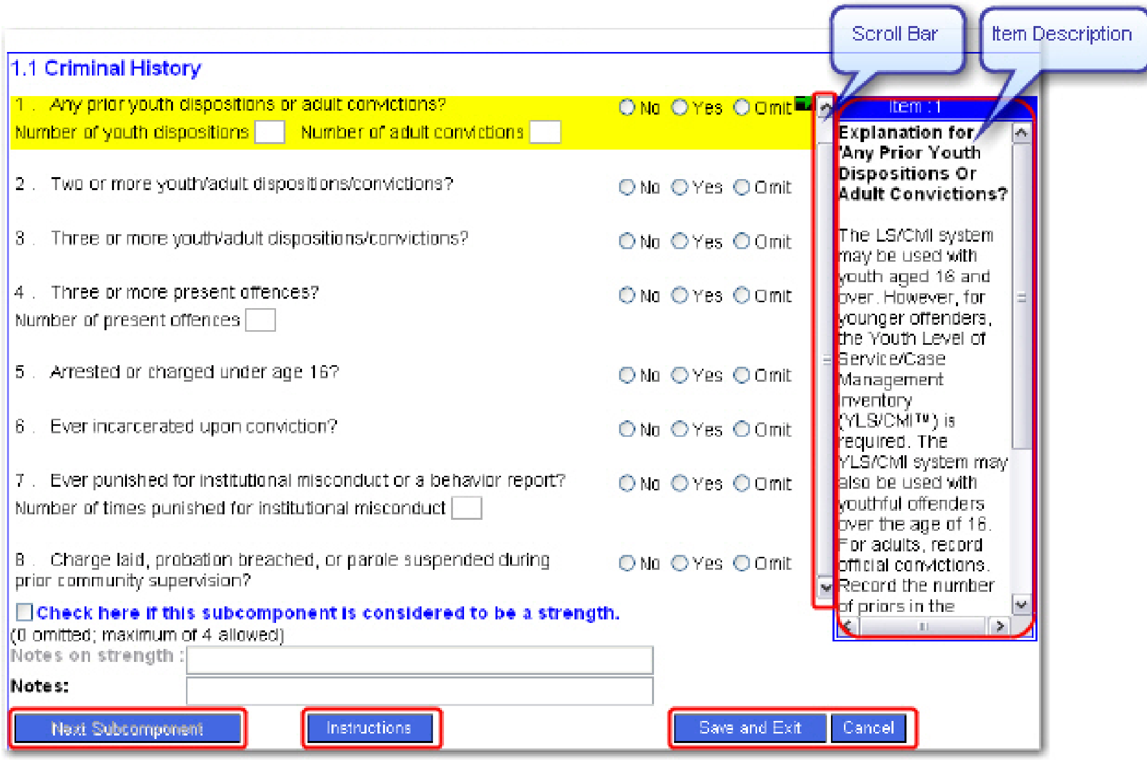
   Use the scroll bar next to the item description box to view items that may not appear on the screen.

   Note that certain subcomponents may be listed as a strength by checking the **Strength** checkbox at the end of each subcomponent page.

2. To continue to the next section of Part 1, click **Next Subcomponent**. Note that the Next Subcomponent button does not become active until after all the items have been answered.

   For further information about the current subcomponent and part, click **Instructions**.

   To save responses to this part and complete the rest of the assessment at another time, click **Save and Exit**.



3. After you have completed all 43 items, a summary page appears asking you to review your responses.

   To make changes to your answers, click **Go Back**.

   To continue, click **Exit**, then click **OK** when prompted to save your responses.
4. If there were any discrepancies in your responses, the Validation Screen appears. Make any corrections to your responses, then click **Next**.
5. Click **OK** when prompted to score results. Note that responses to Part 1 cannot be changed once results have been scored.
6. The Parts page appears. Click **Edit** on any of the available parts to proceed to that part.

Completing parts 2 through 8

Parts 2 through 8 can be completed only after Part 1 has been completed and scored.

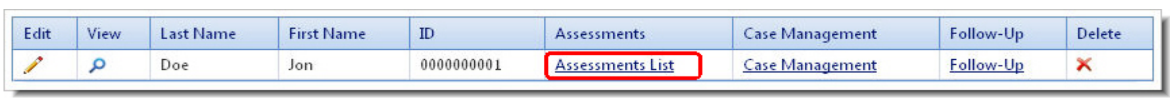
If you are completing Parts 2 through 8 immediately after completing Part 1, the Parts page is already open; skip to step 5.

If you are completing Parts 2 through 8 at a later time, open the Parts page.

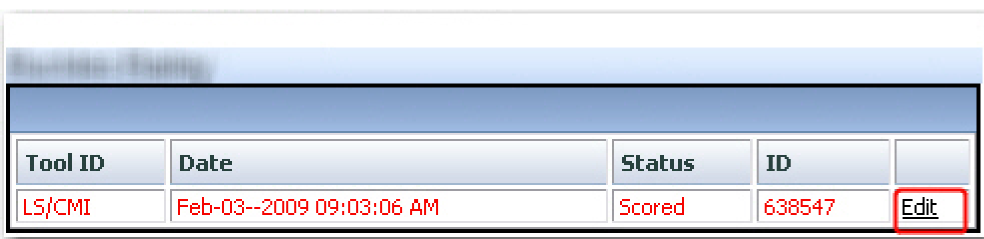
> Note: If the offender's reason for assessment was classified as *Community* in the Offender History, Part 3 will be unavailable.

To open the Parts page

1. From the menu bar, hover your cursor over **Offenders**. From the flyout menu, click **Offender Management**. The Offender Listing page appears.
2. Search for the applicable offender file.
3. Click the **Assessments List** link for that offender.



4. The Assessments List opens. Click **Edit** for the assessment you wish to complete.

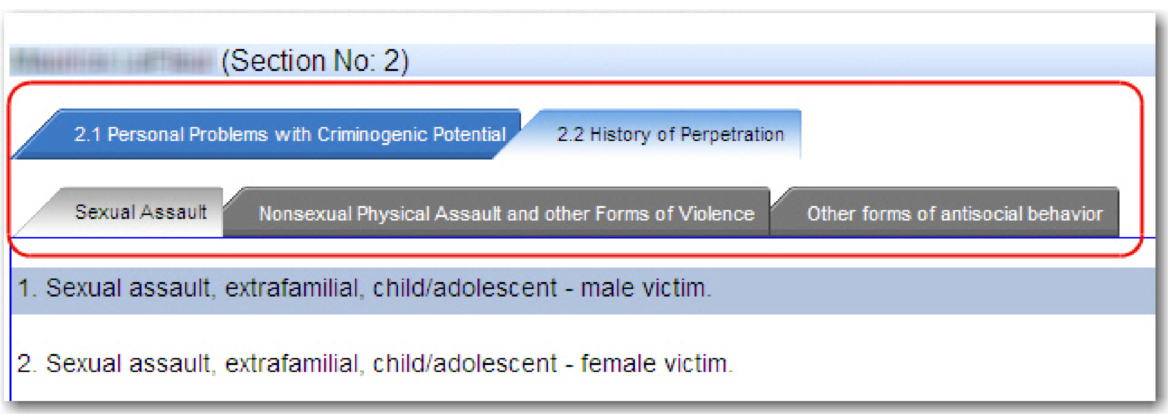


5. The Parts page opens.

Parts	Status	
1	Scored	Edit
2	Incomplete	Edit
3	Incomplete	Edit
4	Incomplete	Edit
5	Incomplete	Edit
6	Incomplete	Edit
7	Complete	Edit
8	Incomplete	Edit

To complete Parts 2 to 8

1. Ensure that Part 1 has been completed and scored.
2. Click **Edit** for any part that you wish to complete. The respective items and questions for the chosen part will appear.
3. Answer each item in turn. For an explanation of any item, place your cursor over the item to highlight it.
4. Click the tabs at the top of the screen to toggle between the various subcomponents. Make sure that you answer all of the items under every tab.



5. When you are finished, click **Save & Exit as Complete** to save your responses *and* include the part in the report. You will be returned to the Parts page where you can choose another part to complete using the above procedure.

   If you don't have time to finish all of the items, or you do not wish to include the part in the report, click **Save & Exit as Incomplete**. You can return to the part at a later date by re-opening the part page.

Completing parts 9 through 11

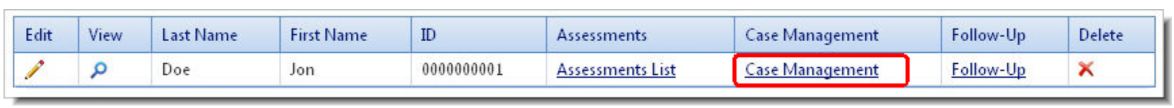
After you have completed Parts 1 to 8 of the LS/CMI assessment, you can complete the Case Management Plan.

The Case Management Plan includes parts 9 through 11. It is advisable to complete the parts in order.

Note: If the offender's reason for assessment was classified as *Community* in the Offender History, certain part items will be unavailable.

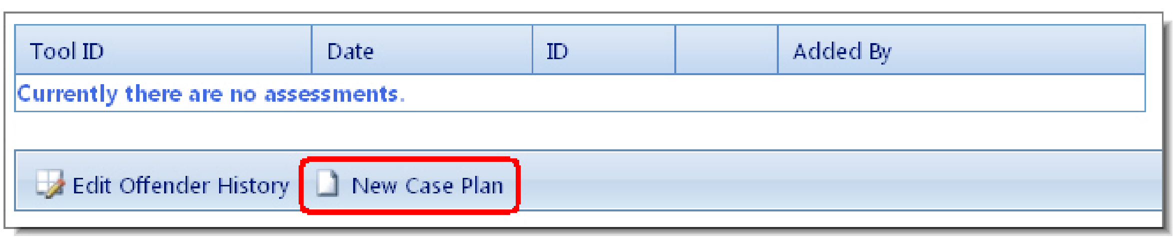
To complete parts 9 through 11

1. From the menu bar, hover your cursor over **Offenders**. From the flyout menu, click **Offender Management**. The Offender Listing page appears.
2. Search for the applicable offender file.
3. Click on the **Case Management** link for that offender.



The case management page appears.

4. If there are no case management files listed in the table, click **New Case Plan**.



Part 9 of the Case Management Plan appears.

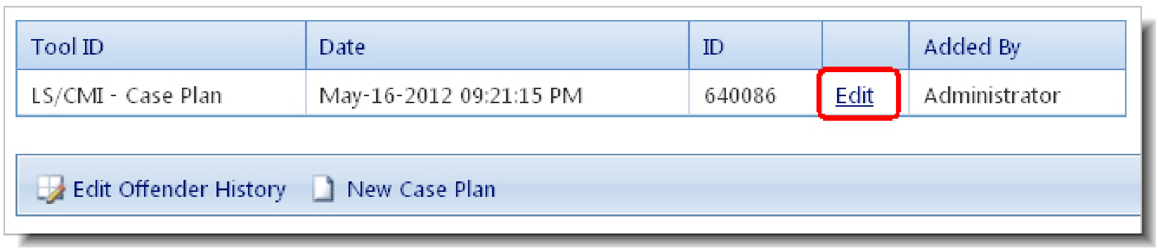
5. Answer each item in turn. For an explanation of any item, place your cursor over the item to highlight it.
6. Click the tabs at the top of the screen to toggle between the various subcomponents. Make sure that you answer all of the items under every tab.
7. When you have finished Part 9, click **Save & Exit**.
8. The Parts page appears. Click **Edit** on any of the available parts to proceed to that part.
9. Complete the remaining parts the same way as you did for Part 9.

To edit parts 9 through 11

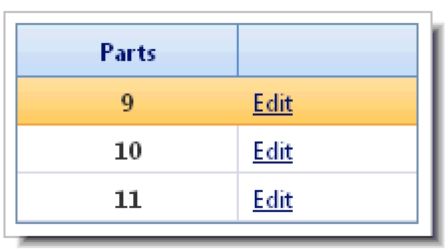
If you were unable to complete parts 9 through 11 in one sitting, or if you want to return to a part to make changes, you can access the parts on the Parts page.

1. From the menu bar, hover your cursor over **Offenders**. From the flyout menu, click **Offender Management**. The Offender Listing page appears.
2. Search for the applicable offender file.
3. Click the **Case Management** link for that offender.

   The case management page appears.
4. Click **Edit** for the Case Plan you wish to continue/modify.



   The Parts Page appears.
5. Click **Edit** for any part that you wish to complete. The respective items and questions for the chosen part will appear.



To add a criminogenic need in Part 9.2

i. Click **Add Criminogenic Needs.**
ii. Select a need from the **Criminogenic Need** drop-down menu.
iii. Enter details in the required text boxes.
iv. Click **Insert**.

To reorder the list, highlight a need and click **Move Up** or **Move Down**.

To add a non-criminogenic need in Part 9.2

i. Click **Add Non-Criminogenic Needs.**
ii. Select a need from the **Non-Criminogenic Need** drop-down menu.
iii. Enter details in the required text boxes.
iv. Click **Insert**.

To reorder the list, highlight a need and click **Move Up** or **Move Down**.

Note: In order to monitor the progress of a non-criminogenic need in Part 10.2, they must first be entered in Part 9.2.

To add a responsivity issue in Part 9.2

i. Click **Add Responsivity.**
ii. Select an issue from the **Responsivity Issue** drop-down menu.
iii. Enter details in the required text boxes.
iv. Click **Insert**.

To monitor the progress of a criminogenic need in Part 10.1

i. Click **Edit** beside the need you wish to modify.
ii. Enter details in the required text boxes.
iii. Click **Update**.

Note: In order to monitor the progress of a criminogenic need, the need must first be entered in Part 9.2.

To monitor the progress of a non-criminogenic need in Part 10.2

i. Click **Edit** beside the need you wish to modify.
ii. Enter details in the required text boxes.
iii. Click **Update**.

Note: In order to monitor the progress of a non-criminogenic need, the need must first be entered in Part 9.2.

6. When you finish the part, click **Save & Exit**.

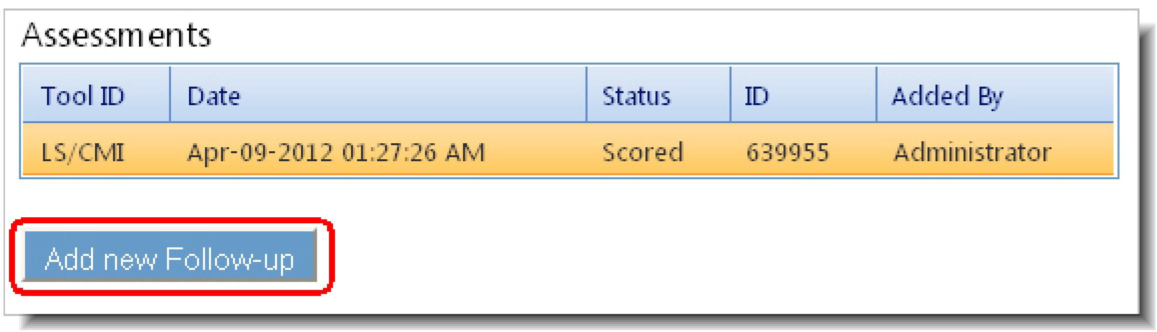
The Follow-Up Form

The Follow-Up Form allows you to record important information relevant to the offender subsequent to the initial LS/CMI assessment, and to monitor the offender's behavior in the community or institution in order to evaluate placement decisions and offender progress.

One year after the offender's initial LS/CMI assessment, an email message will be sent to the address recorded in your Contact Information to remind you to complete the Follow-Up form.

To complete an offender follow-up form

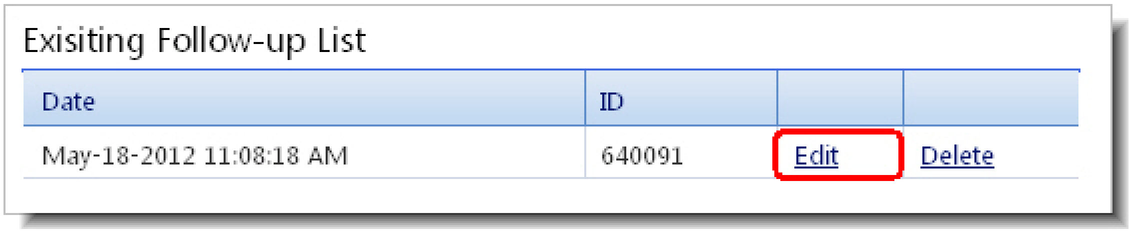
1. From the menu bar, hover your cursor over **Offenders**. From the flyout menu, click **Offender Management**. The Offender Listing screen appears.
2. Search for the applicable offender file.
3. Click on the **Follow-Up** link for that offender. The Assessments page opens, listing all of the offender's scored LS/CMI assessments.
4. Click a row to select a record in the table. The row you selected is now highlighted.



5. Click **Add New Follow-Up**. The Follow-Up Form page appears.

   The options available on this page will become available or unavailable depending on the selections you make in the **Type of Follow-Up** and **Status** fields.
6. Complete the form, then click **Save**. You are returned to the Assessments page.

A record of this Follow-Up Form now appears in the Follow-Up List. To make changes to the form, click **Edit**.



Exisiting Follow-up List

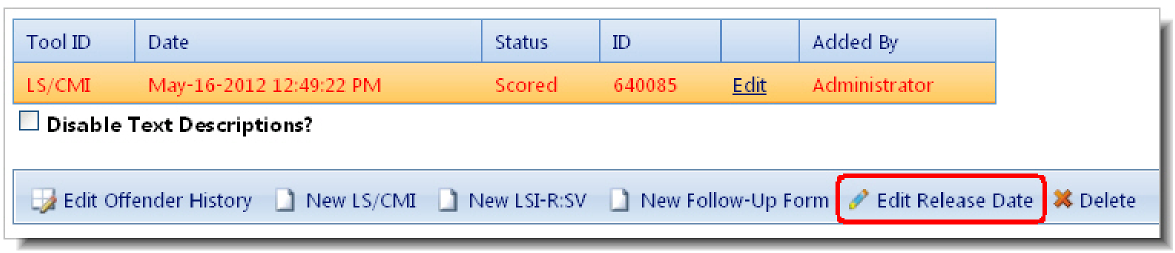
Date	ID		
May-18-2012 11:08:18 AM	640091	Edit	Delete

Release Date

You should revise the Release Date if the LS/CMI assessment was made in a correctional setting and the offender has been released since the date of his or her assessment.

To set an offender's release date

1. From the menu bar, hover your cursor over **Offenders**. From the flyout menu, click **Offender Management**. The Offender Listing page appears.
2. Search for the applicable offender file.
3. Click on the **Assessments List** link for the offender for whom you will be setting the release date. The Assessments page opens, listing all the scored LS/CMI assessments for the offender you selected.
4. Click to select a record in the table. The row you selected is now highlighted.



5. Click **Edit Release Date**. The Edit Release Date page appears.
6. Type the offender's release date in the appropriate text box (or click the calendar to browse to the release date), then click **Save**.

The release date is saved to the database and you return to the Assessments page.

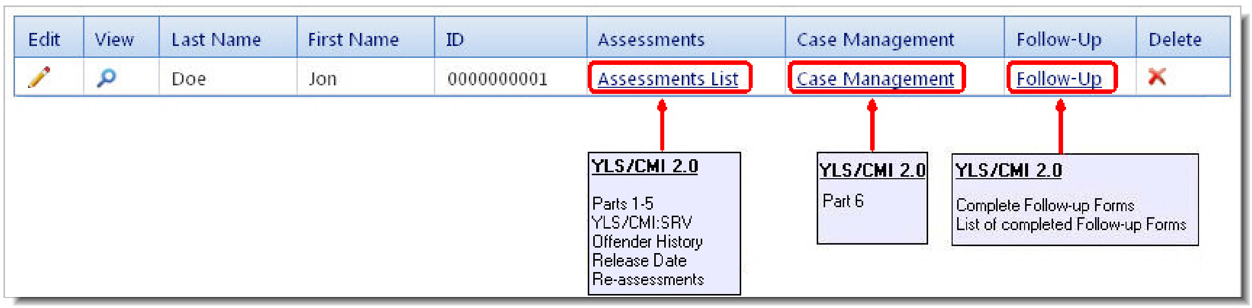
An email will be sent to the address recorded in your Contact Information one year after the release date to remind you to complete the Follow-Up form.

YLSCMI assessments

Assessment overview

To complete a YLS/CMI 2.0 or YLS/CMI:SRV, or to fill in an Offender History, Case Management, or Follow-up form for an offender, you first must find and select the offender file.

The following illustration shows the areas of Offender Management where each assessment task is done:



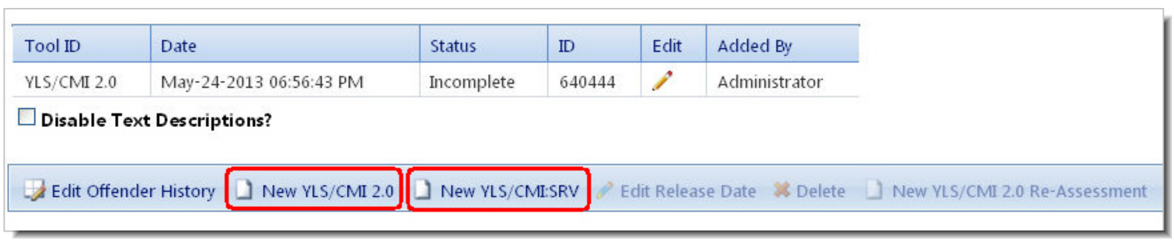
Selecting an assessment

If you are beginning a YLS/CMI 2.0 for a **new** offender file, you will be prompted to select an assessment type and complete the Offender History form.

To select an assessment type

1. From the YLS/CMI 2.0 menu bar, hover your cursor over **Offenders**. From the flyout menu, click **Offender Management**. The Offender Listing page appears.
2. Search for the applicable offender file.
3. Click on the **Assessments List** link for the relevant offender. The Assessments page appears.

   By default, the YLS/CMI 2.0 and YLS/CMI:SRV assessment pages include a description "pane" that provides guidance for rating each item. However, if you do *not* want to view these text descriptions of each item, select the **Disable Text Descriptions** checkbox.
4. Click **New YLS/CMI 2.0** (or **New YLS/CMI:SRV**).



The Offender History Form appears.

If you have already completed the Offender History form, the Interviewer page appears.

Completing the offender history form

The Offender History form stores valuable background information about the offender. This information can be edited at any time.

You are prompted to complete the Offender History form whenever you begin a YLS/CMI 2.0 for a new offender file.

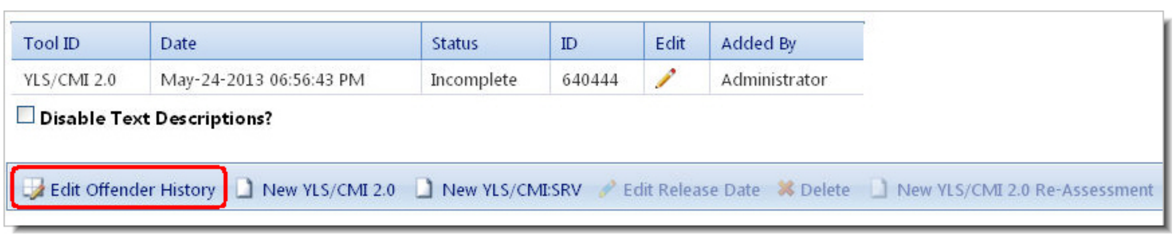
To complete the offender history form

1. Fill in the text boxes on the Offender History page. Note that **Setting (Norm)** is a required field.
2. Click **New** to save the form.

   The Interviewer page appears.

To edit the offender history form

1. Search for the offender file.
2. Click on the **Assessments List** link for the relevant offender. The Assessments page appears.
3. Click **Edit Offender History**.

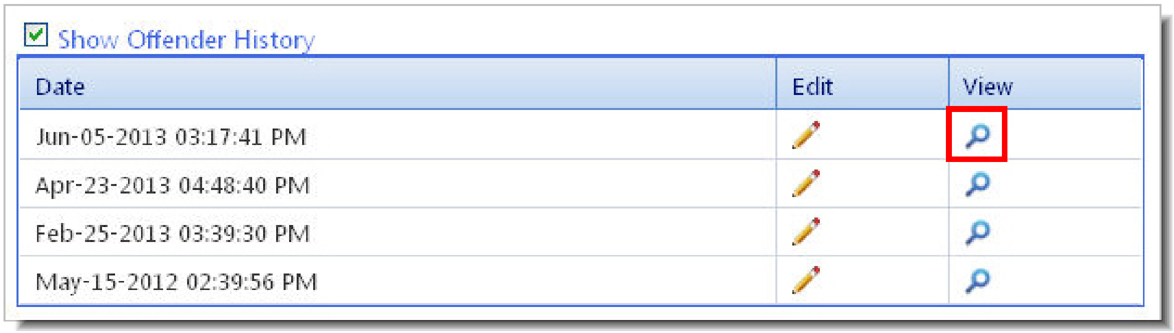


The Offender History page appears.

4. Make your changes to the text boxes.
5. When you are finished, click **Overwrite** to overwrite the existing offender history form, or click **New** to save the current offender history as a separate entry.

To view saved offender history forms

1. Click the **Show Offender History** checkbox at the bottom of the Assessments page.
2. Click the **View** icon beside the history you wish to open.


Show Offender History
Date
Edit
View
Jun-05-2013 03:17:41 PM
Apr-23-2013 04:48:40 PM
Feb-25-2013 03:39:30 PM
May-15-2012 02:39:56 PM

Selecting the interviewer

After you save the Offender History form, the interviewer information page opens, pre-populated with date and time data. The Interviewer field contains the first and last name of the active user account.

To select the interviewer

1. Confirm the interviewer name, or type the name of a different interviewer in the text box.
2. Click **Next**. Part 1 of the YLS/CMI 2.0 appears.

Completing part 1

If you are beginning a YLS/CMI 2.0 for a **new** offender file, you will be prompted to complete the Offender History form. After you click **New** in the Offender History form, the interviewer information opens, populated with date and time data. The Interviewer field contains the first and last name of the active user account. Confirm the interviewer name, or type the name of the interviewer in the field provided, then click **Next**. Part 1 of the YLS/CMI 2.0 opens.

To complete the YLS/CMI 2.0 part 1

1. Answer each item on the page by clicking the **No**, **Yes**, or **Omit** button, and filling out the appropriate text boxes. All items on this screen must be completed to continue to the next subcomponent.

   For an explanation of any item, place your cursor over the item to highlight it. The explanation appears in the item description box on the right side of the screen.

   If more than four items are omitted, the assessment is considered invalid.

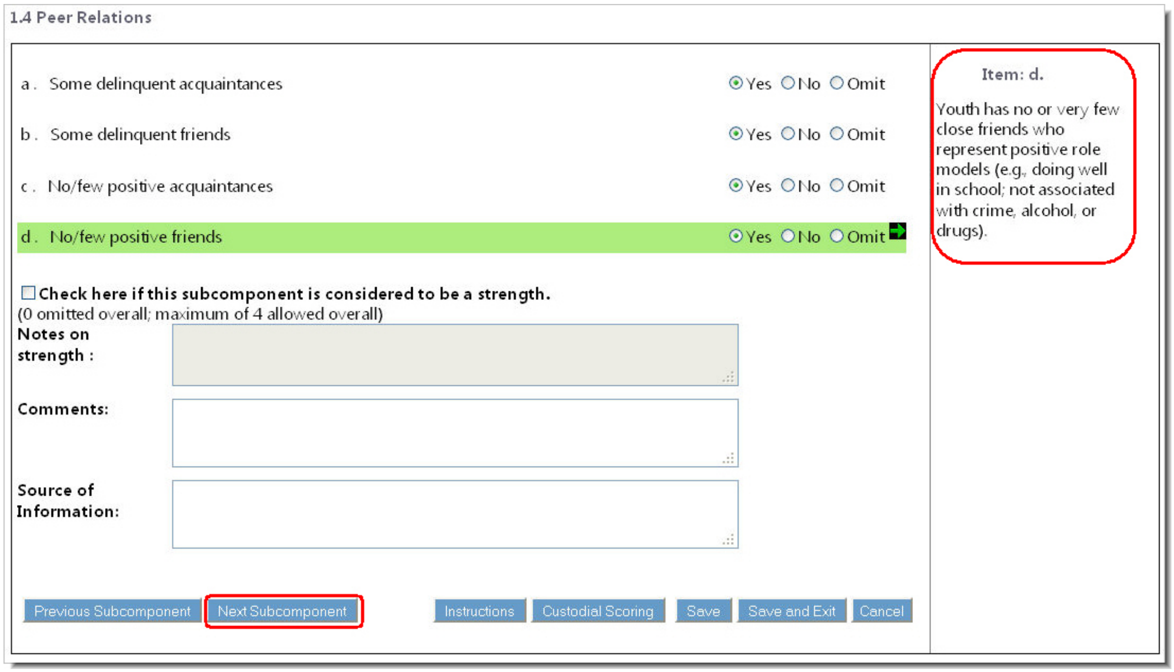
   Note that each subcomponent (except 1.1 Prior and Current Offenses/Dispositions) may be listed as a strength by checking the **Strength** checkbox near the bottom of each subcomponent page.

2. To continue to the next section of Part 1, click **Next Subcomponent**. Note that the Next Subcomponent button does not become active until after all the items have been answered.

   For further information about the current subcomponent and part, click **Instructions**.

   For information on custodial scoring and how it relates to the current subcomponent, click **Custodial Scoring**.

   To save responses to this part and complete the rest of the assessment at another time, click **Save and Exit**.



3. After you have completed all 42 items, a summary page appears asking you to review your responses.

   To make changes to your answers, click **Go Back**.

   To continue, click **Save & Exit**, then click **OK** when prompted to save your responses.

4. If there were any discrepancies in your responses, the Validation Screen appears. Make any corrections to your responses, then click **Next**.

5. Click **OK** when prompted to score results. Note that responses to Part 1 cannot be changed once results have been scored.

   - Click **Cancel** to return to the Assessment Parts page. If you click Cancel, the assessment will be listed as Complete but not Scored, meaning you may return to make changes to the assessment at a later time.

6. If you click OK, the assessment is scored and you are returned to the Assessment Parts page. Part 1 is listed as Scored, Part 2 is listed as Complete, and Parts 3-5 are listed as Incomplete. Click **Edit** on any of the available parts to proceed to that part.

Completing parts 2 through 5

Parts 2 through 5 can be completed only after Part 1 has been completed and scored. Note that Part 2 can only be viewed; Parts 3 through 5 may be edited.

If you are completing Parts 2 through 5 immediately after completing Part 1, the Parts page is already open; skip to step 5.

If you are completing Parts 2 through 5 at a later time, open the Parts page.

To open the parts page

1. From the menu bar of the YLS/CMI 2.0, hover your cursor over **Offenders**. From the flyout menu, click **Offender Management**. The Offender Listing page appears.
2. Search for the applicable offender file.
3. Click the **Assessments List** link for that offender.

Edit	View	Last Name	First Name	ID	Assessments	Case Management	Follow-Up	Delete
		Doe	Jon	0000000001	Assessments List	Case Management	Follow-Up	

4. The Assessments List opens. Click the **Edit icon** for the assessment you wish to complete.

Tool ID	Date	Status	ID	Edit	Added By
YLS/CMI 2.0	May-27-2013 05:20:01 PM	Scored	640467		Administrator

5. The Parts page opens.

Parts	Status	Edit
1: Assessment of Risks and Needs	Scored	
2: Summary of Risks and Needs	Complete	
3: Assessment of Other Needs and Special Considerations	Incomplete	
4: Final Risk/Need Level and Professional Override	Incomplete	
5: Program/Placement Decision.	Incomplete	

To complete parts 2 to 5

1. Ensure that Part 1 has been completed and scored.
2. Click the **Edit** icon for any part that you wish to complete. The respective items and questions for the chosen part will appear.
3. Answer each item in turn. For an explanation of any item, place your cursor over the item to highlight it.
4. Click the tabs at the top of the screen to toggle between the various subcomponents. Make sure that you answer all of the items under every tab.
5. When you are finished, click **Save & Exit as Complete** to save your responses *and* include the part in the report. You will be returned to the Parts page where you can choose another part to complete using the above procedure.

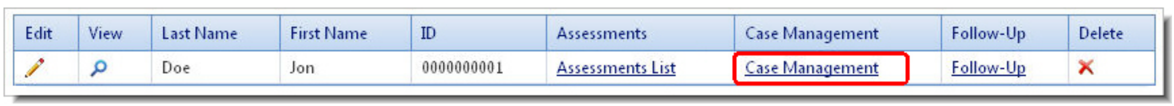
   If you don't have time to finish all of the items, or you do not wish to include the part in the report, click **Save & Exit as Incomplete**. You can return to the part at a later date by re-opening the Parts page.

Completing part 6

The Case Management Plan of the YLS/CMI 2.0 has one part -- Part 6.

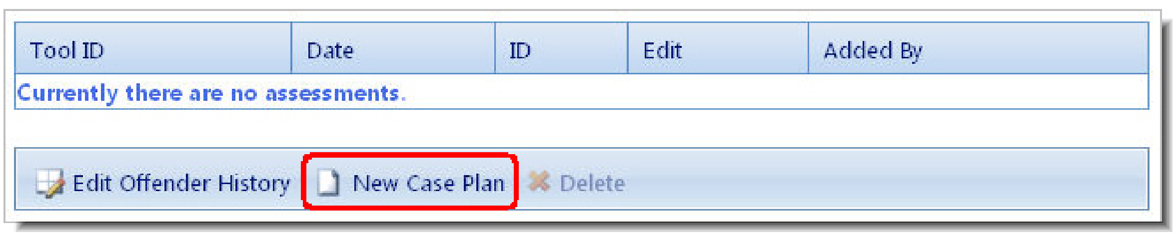
To complete part 6

1. From the menu bar, hover your cursor over **Offenders**. From the flyout menu, click **Offender Management**. The Offender Listing page appears.
2. Search for the applicable offender file.
3. Click on the **Case Management** link for that offender.



The case management page appears.

4. If there are no case management files listed in the table, click **New Case Plan**.



The Case Management Plan appears.

5. Make changes and additions to the Plan by entering details into the text boxes. Click the tabs at the top of the screen to toggle between the various subparts.

Note that Part 6.1 and Part 6.2 will be pre-filled based on the most recent YLS/CMI 2.0 assessment and any custom case management plans that have been set up, prioritized according to risk level.

To add a subcomponent in Part 6.1

i. Click **Add New Case Management.**
ii. Select a component from the **Subcomponent** drop-down menu.
iii. Enter details in the required text boxes.
iv. Click **Insert**.

To reorder the list, highlight a subcomponent and click **Move Up** or **Move Down**.

To add a non-criminogenic need in Part 6.2

i. Click **Add New Case Management.**

ii. Select a need from the **Need** drop-down menu.

iii. Enter details in the required text boxes.

iv. Click **Insert**.

To reorder the list, highlight a need and click **Move Up** or **Move Down**.

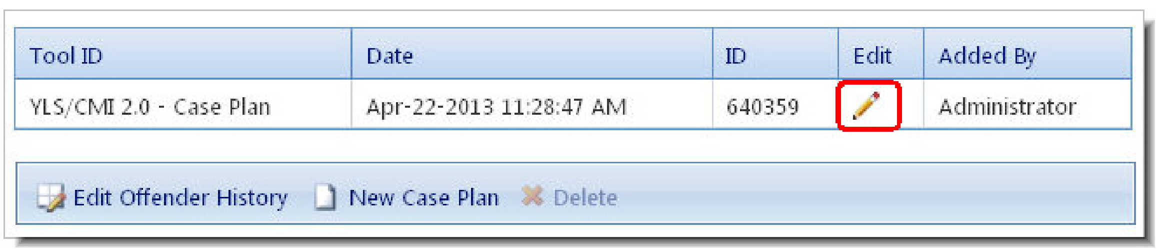
6. When you have finished all of the subparts, click **Save & Exit**.

To edit part 6

If you were unable to complete Part 6 in one sitting, or if you want to make changes later on, you can access Part 6 on the case management page.

1. From the menu bar, hover your cursor over **Offenders**. From the flyout menu, click **Offender Management**. The Offender Listing page appears.
2. Search for the applicable offender file.
3. Click the **Case Management** link for that offender.

   The case management page appears.
4. Click the **Edit icon** for the Case Plan you wish to continue/modify.



   Part 6 appears.
5. Make your changes to the subparts.
6. When you are finished, click **Save & Exit**.

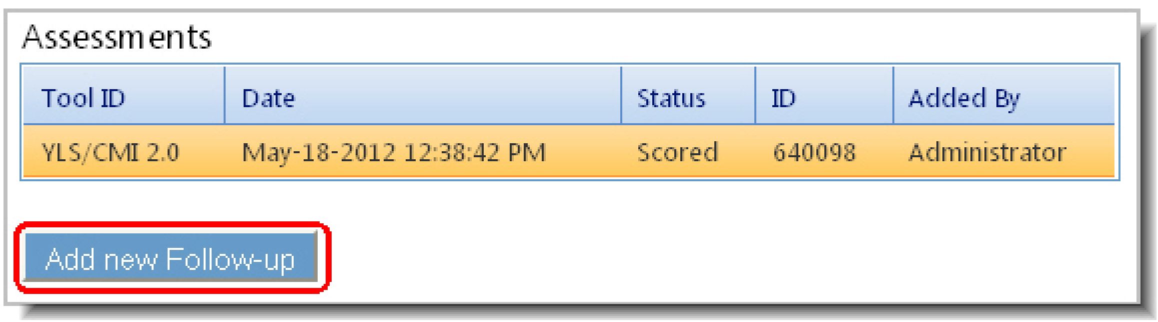
The Follow-Up Form

The Follow-Up Form allows you to record important information relevant to the offender subsequent to the initial YLS/CMI 2.0 assessment, and to monitor the offender's behavior in the community or institution in order to evaluate placement decisions and offender progress.

One year after the offender's initial YLS/CMI 2.0 assessment, an email message will be sent to the address recorded in your Contact Information to remind you to complete the Follow-Up form.

To complete an offender follow-up form

1. From the YLS/CMI 2.0 menu bar, hover your cursor over **Offenders**. From the flyout menu, click **Offender Management**. The Offender Listing page appears.
2. Search for the applicable offender file.
3. Click on the **Follow-Up** link for that offender. The Assessments page opens, listing all of the offender's scored YLS/CMI 2.0 assessments.
4. Click a row to select a record in the table. The row you selected is now highlighted.



5. Click **Add New Follow-Up**. The Follow-Up Form page appears.

   The options available on this page will become available or unavailable depending on the selections you make in the **Type of Follow-Up** and **Status** fields.

6. Complete the form, then click **Save**. You are returned to the Assessments page.

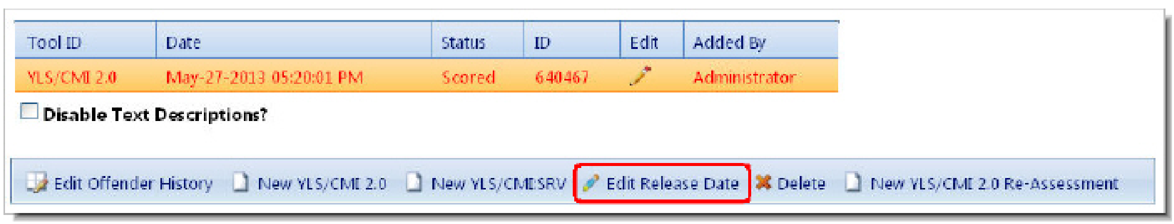
A record of this Follow-Up Form now appears in the Follow-Up List. To make changes to the form, click the **Edit icon**.

Release Date

You should revise the Release Date if the YLS/CMI 2.0 assessment was made in a correctional setting and the offender has been released since the date of his or her assessment.

To set an offender's release date

1. From the menu bar, hover your cursor over **Offenders**. From the flyout menu, click **Offender Management**. The Offender Listing page appears.
2. Search for the applicable offender file.
3. Click on the **Assessments List** link for the offender for whom you will be setting the release date. The Assessments page opens, listing all the scored YLS/CMI 2.0 assessments for the offender you selected.
4. Click to select a record in the table. The row you selected is now highlighted.



5. Click **Edit Release Date**. The Edit Release Date page appears.
6. Type the offender's release date in the appropriate text box (or click the calendar to browse to the release date), then click **Save**.

The release date is saved to the database and you return to the Assessments page.

An email will be sent to the address recorded in your Contact Information one year after the release date to remind you to complete the Follow-Up form.