GIFR ELECTRONIC AND REPORTING SYSTEM (GEARS)

USERS' GUIDE

MHS ASSESSMENTS

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INITIAL REGISTRATION

In order to complete your access to the GEARS platform, you must complete a registration process.

1. On your welcome to GEARS email, you will receive an invitation link to complete the registration process.

GIFR_GEARS_Logo

This is an invitation to be a on GIFR G.E.A.R.S. Click the link below to register your account

Invitation Link: https://www.gifrgears.com/register?id=X5HAvrEIwwuCIPFsJDPVV

Sincerely,

The G.E.A.R.S. Team
Global Institution of Forensic Research, Inc.
www.gifrgears.com

This email was sent by
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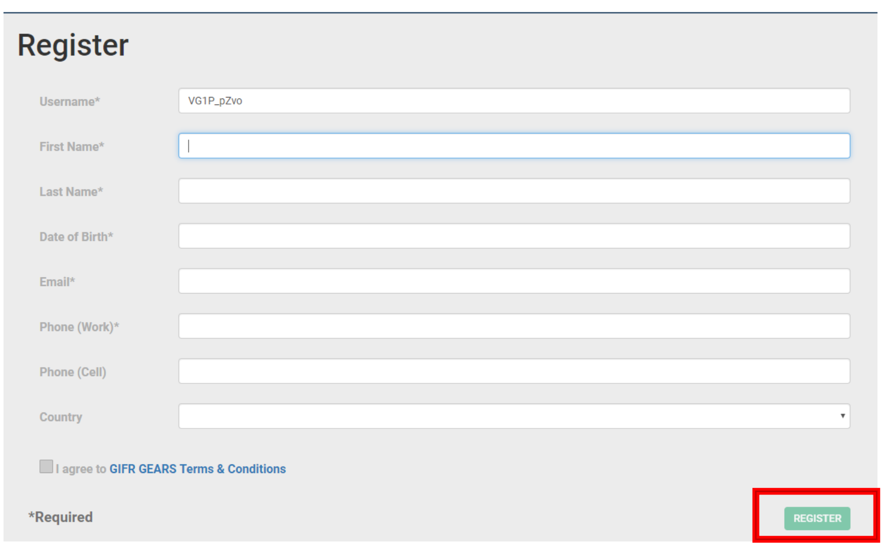
created by
Global Institute of Forensic Research, Inc.

PO Box 950
North Tonawanda, NY 14120-0950
USA

2. Clicking on the registration link will open a page where you fill your personal information.



Register

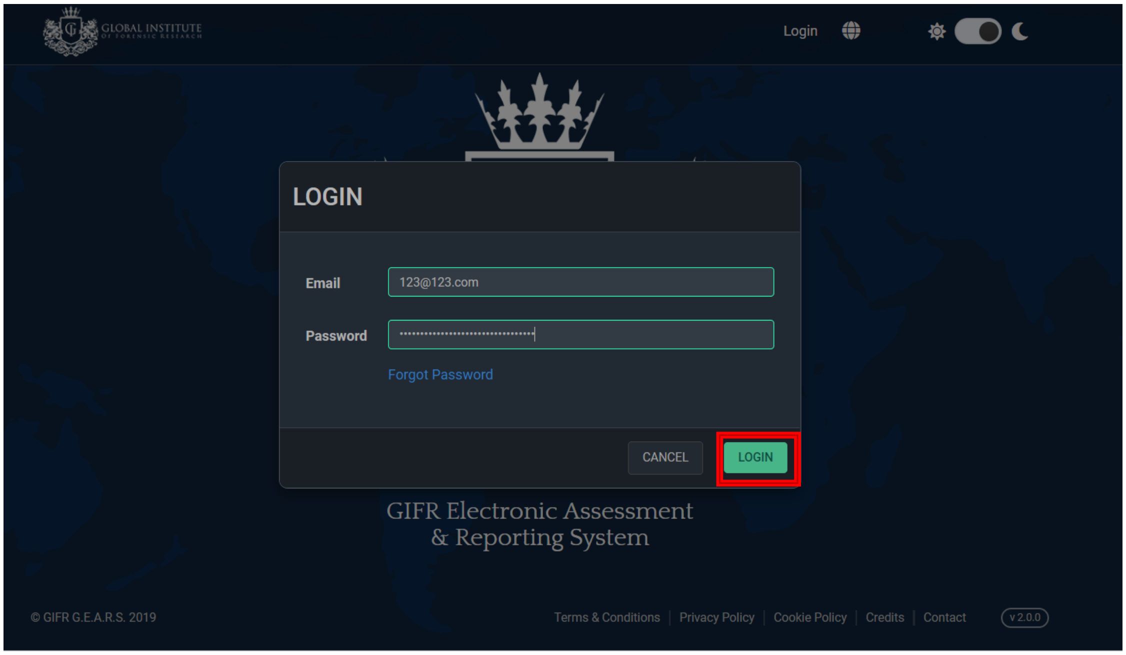
Username* VG1P_pZvo
First Name*
Last Name*
Date of Birth*
Email*
Phone (Work)*
Phone (Cell)
Country

I agree to GIFR GEARS Terms & Conditions

*Required

REGISTER

3. Fill the required information. Click on the GIFR GEARS Terms and Conditions. After reading the Terms and Conditions, you must click "I Agree" to proceed.
4. Click Register you will be taken to the Login page



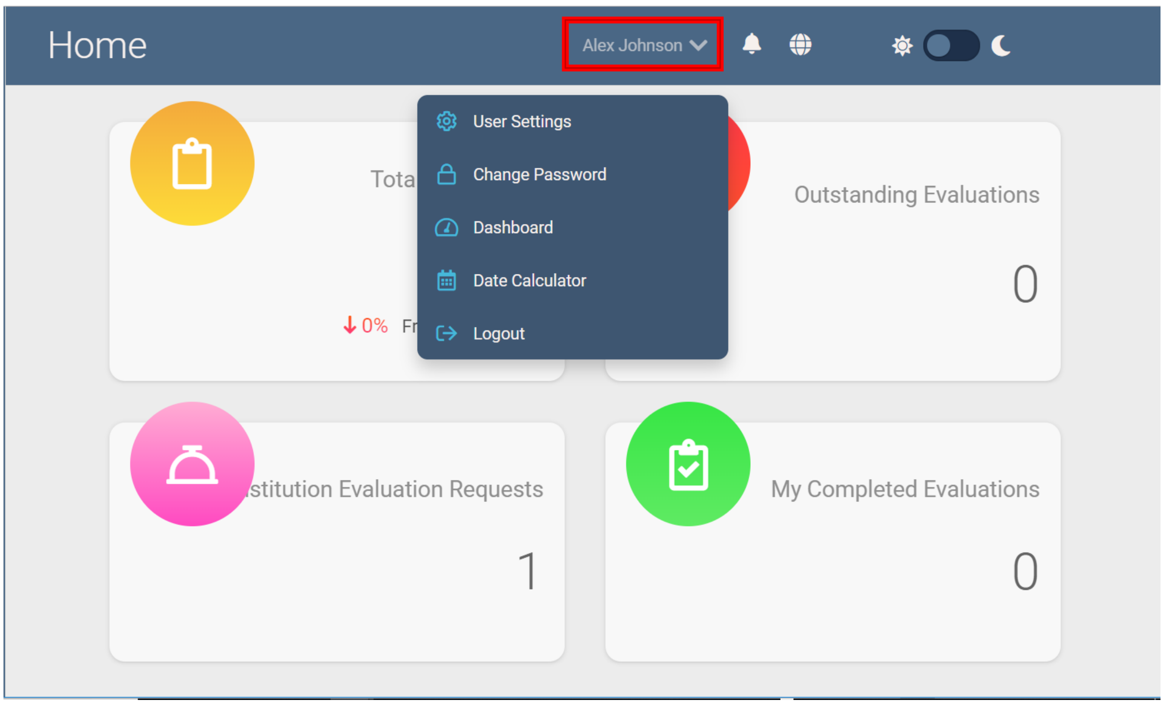
5. You will receive another email containing your email address and your temporary password.
6. Enter your email address and temporary password. Click **Login**.
7. Once you log in to your profile. Change your password

DASHBOARD

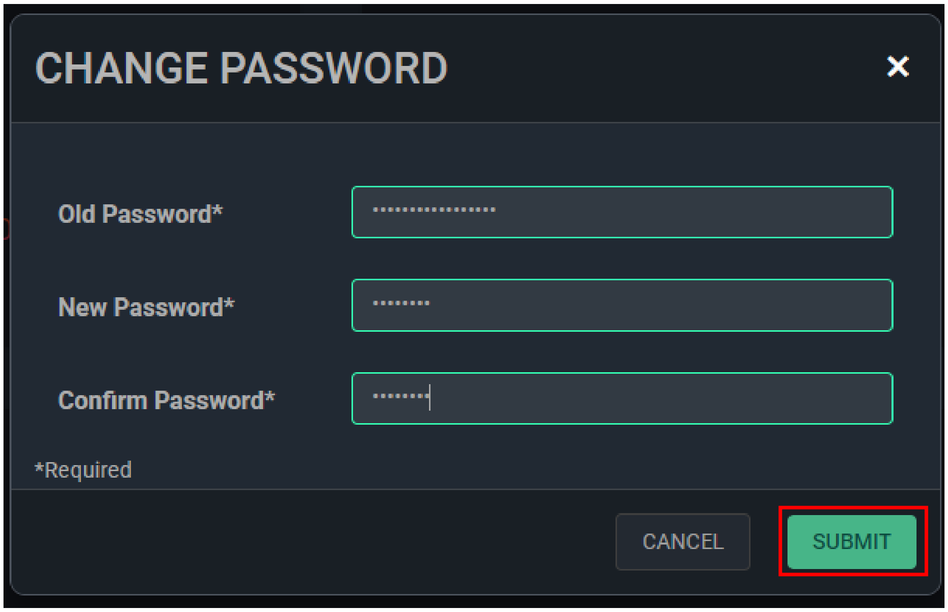
The Dashboard is your Home Page. Upon logging in, this is the first page you will see.

The following is a brief overview of the features available on the dashboard

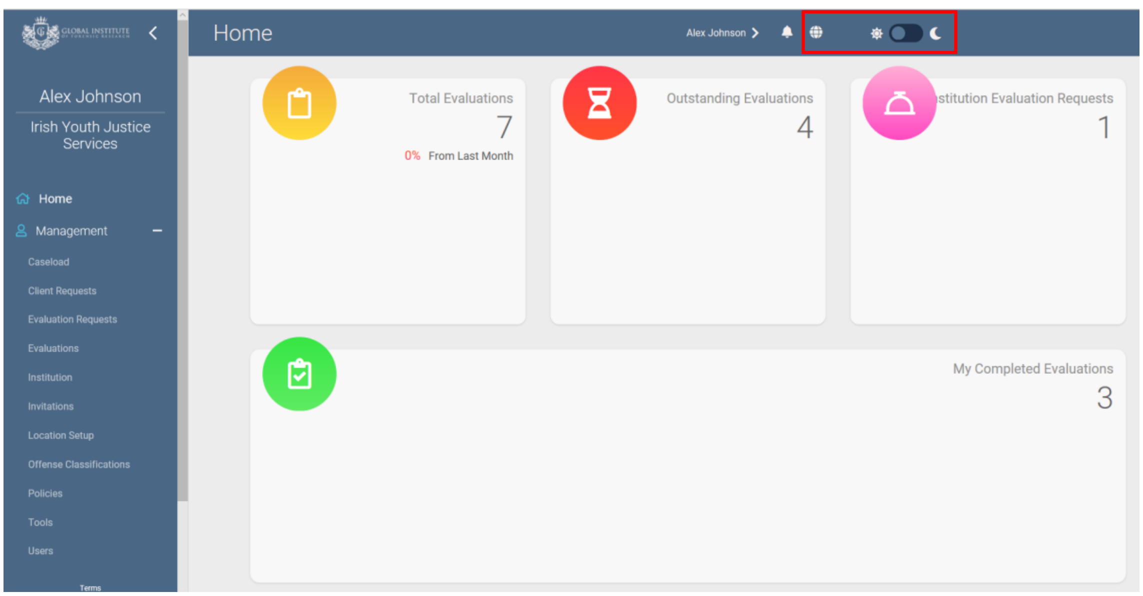
- Clicking on your name at the top right corner of the screen, opens a drop down to features on GEARS



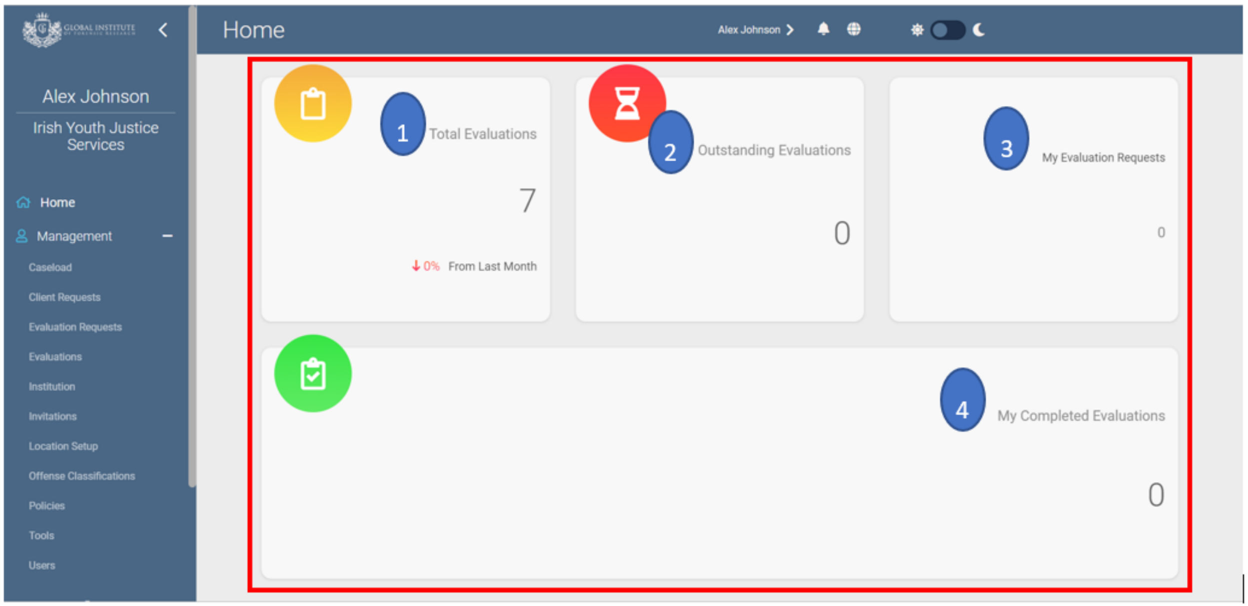
- User Settings allows you to change or update your first and last name, email address, date of birth, phone number and address.
- Change password allows you to change your password. To change your password:
    - Click on your name at the top right corner of the screen and click change password.
    - Enter your old password in the required textbox
    - Enter your new password
    - Confirm your new password
    - Click **Submit.**



- Dashboard gives you access to the dashboard
- Date Calculator allows you to accurately calculate the time between two dates
- Logout allows you to log out of GEARS

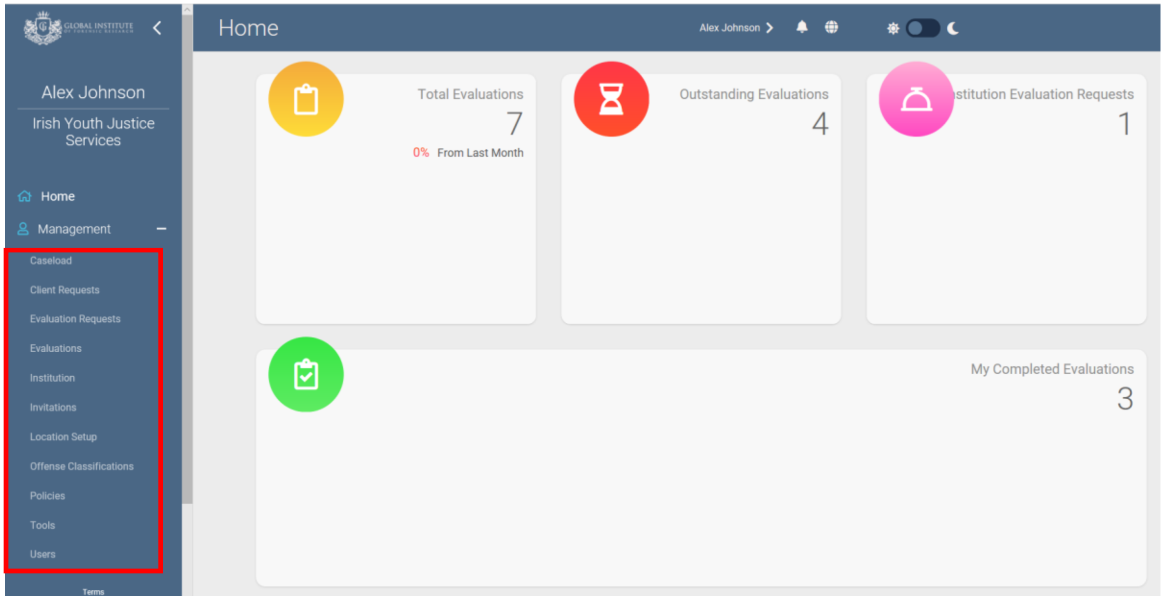


- The notification icon shows notification(s) for incomplete assessment, evaluation request, and client request.
- The Day/Night switch icon allows you to change the background color of your account.



1. Total Evaluation is the total number of assessments, both complete and incomplete.
2. Outstanding Evaluations is the number of your incomplete assessments
3. My Evaluation Requests contain your list of all evaluation request(s).
4. My Completed Evaluations is the number of assessments you have completed.

ITEMS IN THE NAVIGATION MENU



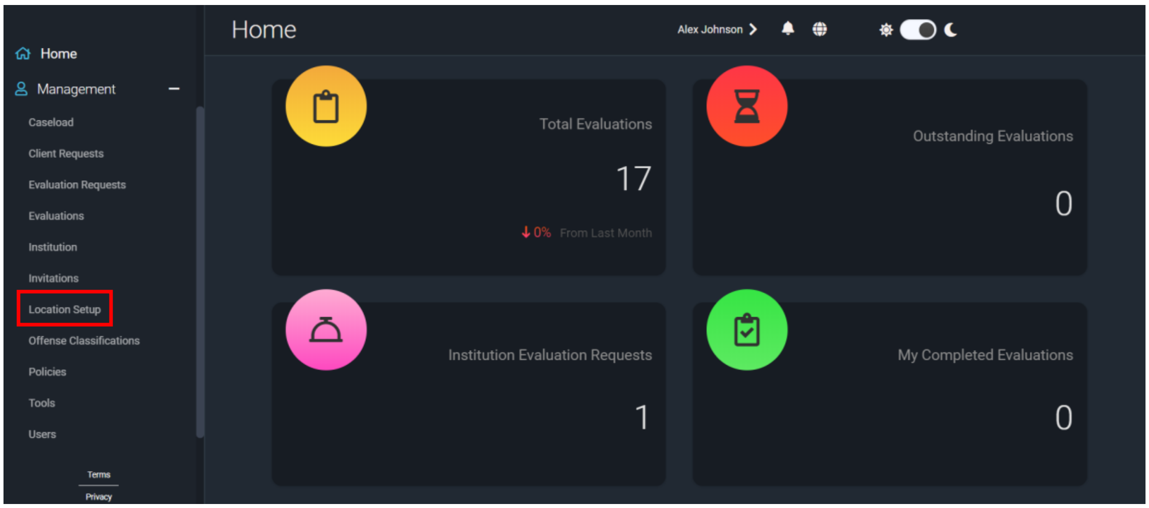
1. Caseload shows the list of clients within your caseload.
2. Client Request shows all your incoming and outgoing requests for client.
3. Evaluation Requests show all your incoming and outgoing request for client's evaluation
4. Evaluations show the list of performed evaluations within your caseload, the date, the evaluator, the status of the assessment, the assessment tool, and the due date of the evaluation.
5. Institution shows the details about your institution such as name, institution type, and address.
6. Invitations show the list of people within your organization invited to use the GEARS platform.
7. Location Setup allows the institution administrator or users with the permission to set up various locations, zones and sub-zones for other users
8. Offense Classifications allows the institution administrator or users with the permission to set up offenses used to fill out the offender history.
9. Tools contain the list of all the assessment tools available to your institution.
10. Users contain the name, email address and the role of each user in your institution.

LOCATION SETUP

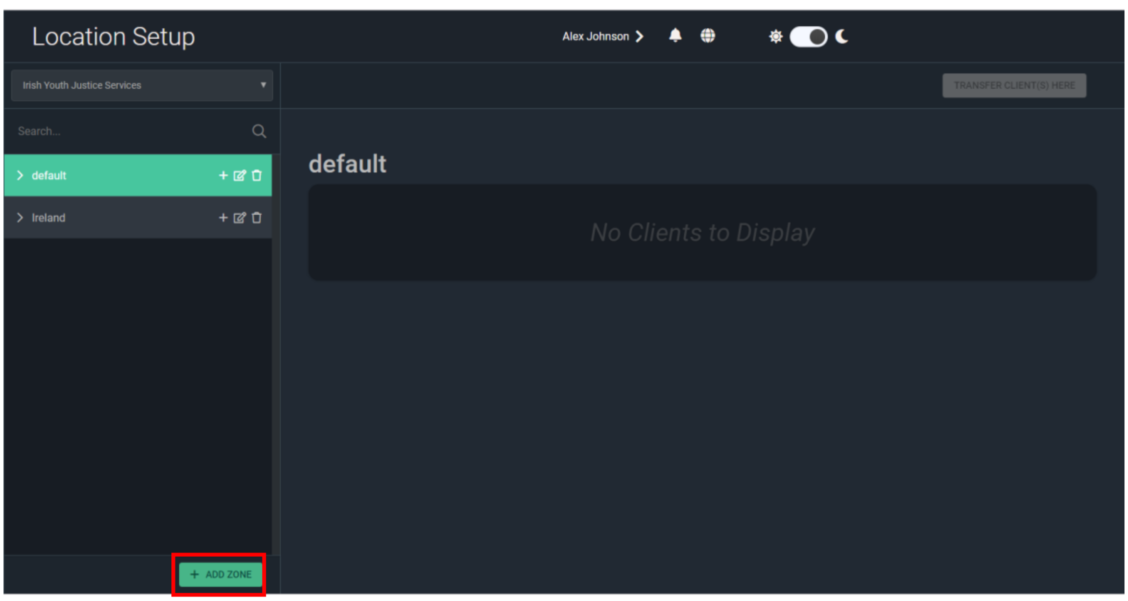
Locations are set up using up a three-tiered system: 1) Zone, 2) Region and 3) Subgroup. Users and clients can then be assigned to a specific location. You must set up all three tiers in order to designate a location to a user or client.

Set Up A New Zone

1. On the navigation menu, click Location Setup.



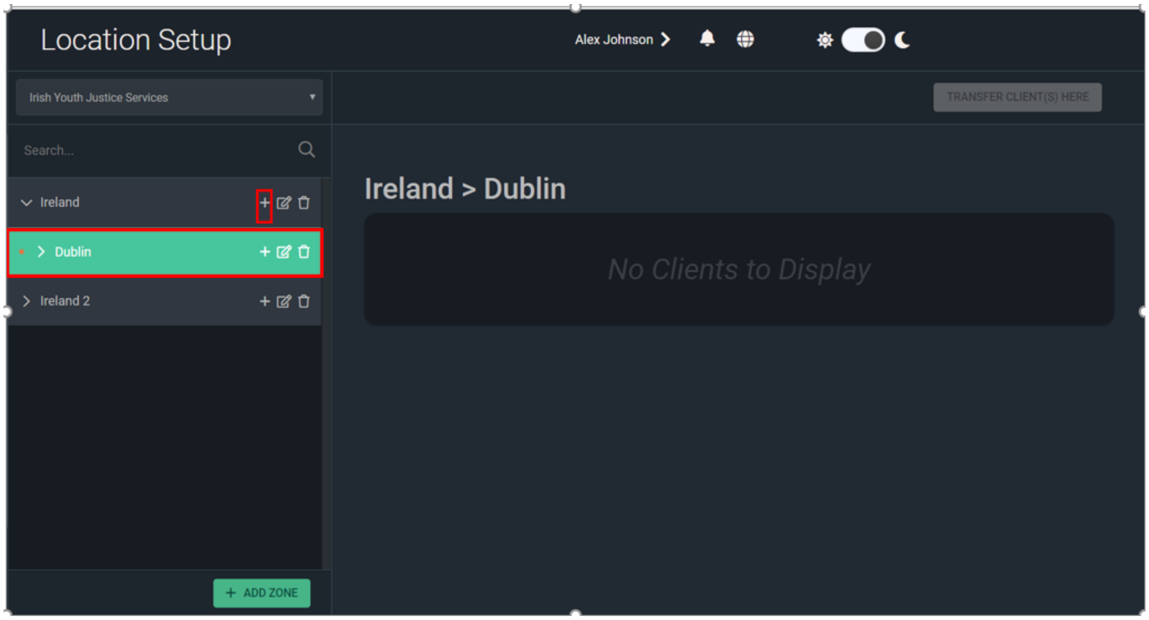
2. From the flyout menu, click Add Zones at the bottom of the page.



3. Type the name of the Zone and click the ✔ icon beside the Zone to save

Set Up a New Region

1. From the navigation menu, click Location Setup.
2. From the Zone list, select the zone that the new region falls under.
3. Click the + icon beside the zone to add a New Region
4. Type the name of the Region and click the ✔ icon beside the Region to save. The new region now appears under the applicable zone.



Set Up a New Sub-Group

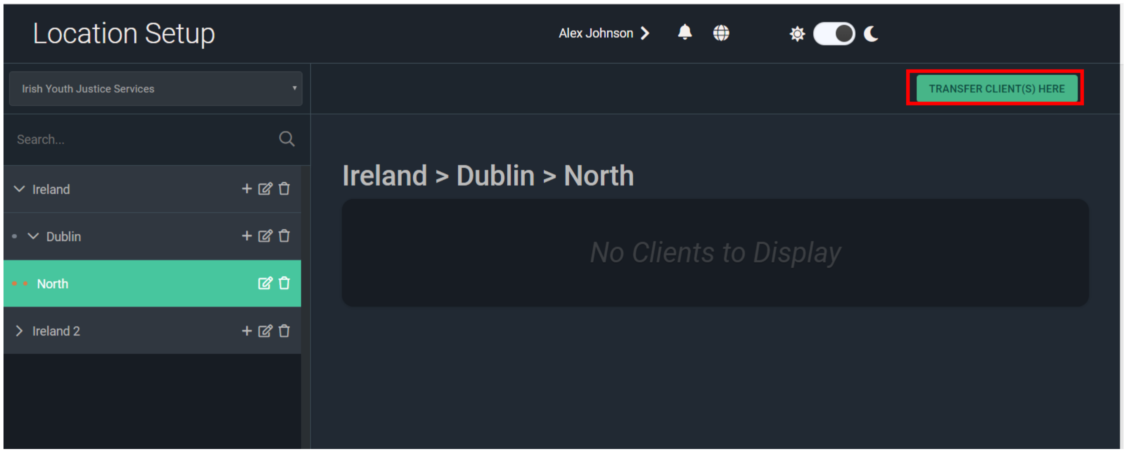
1. Click the + icon beside the Region that the new Subgroup falls under
2. Type the name of the Subgroup and click the ✔ icon beside the Subgroup to save. The new Subgroup now appears under the applicable Region.

These new Zones, Regions, and Sub-Groups will now be available, and you can assign new or existing users and clients to them.

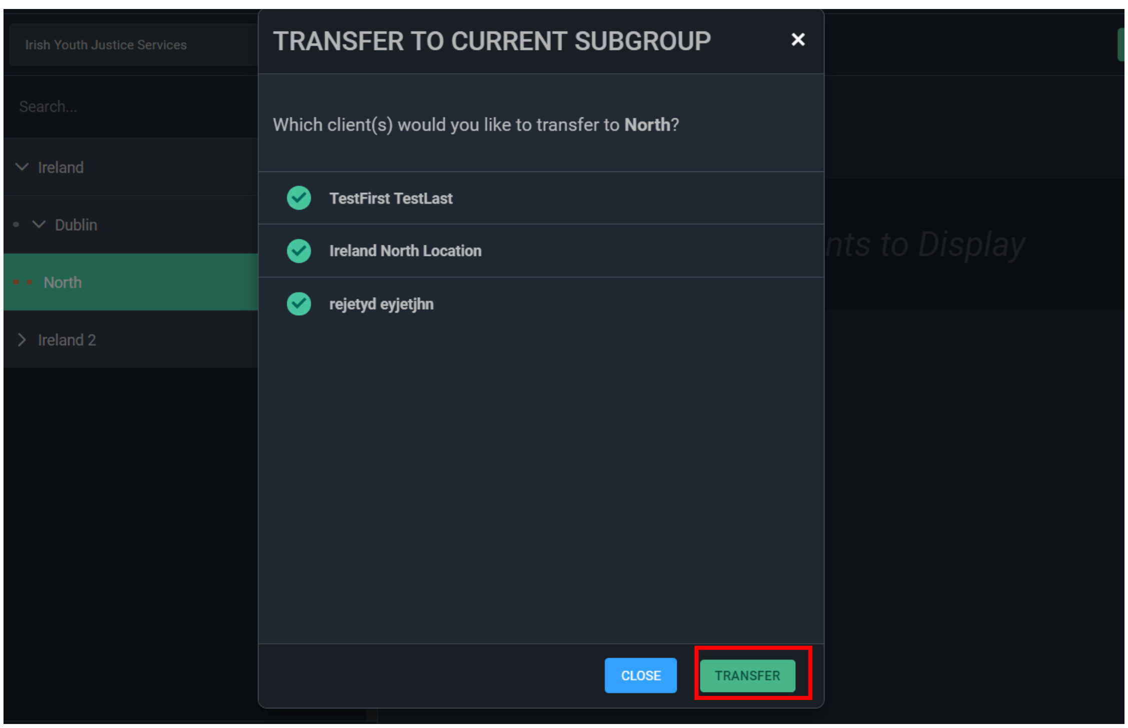
Transfer Existing Clients to Subgroups

Once you are in the Location Setup page

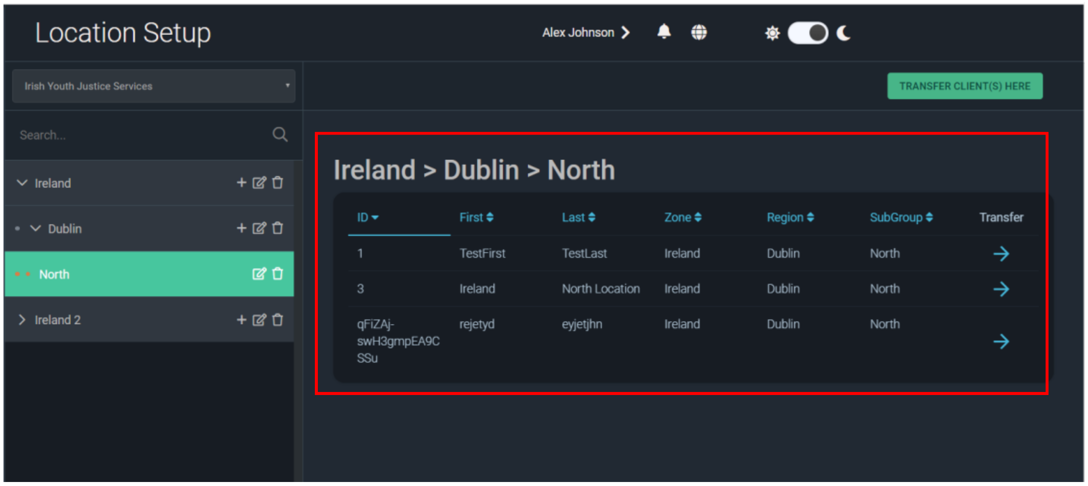
1. Select the subgroup of interest and click Transfer Client(s) here



2. The Transfer to Current Subgroup page will appear. Select the clients you would like to transfer to the subgroup and click **Transfer**



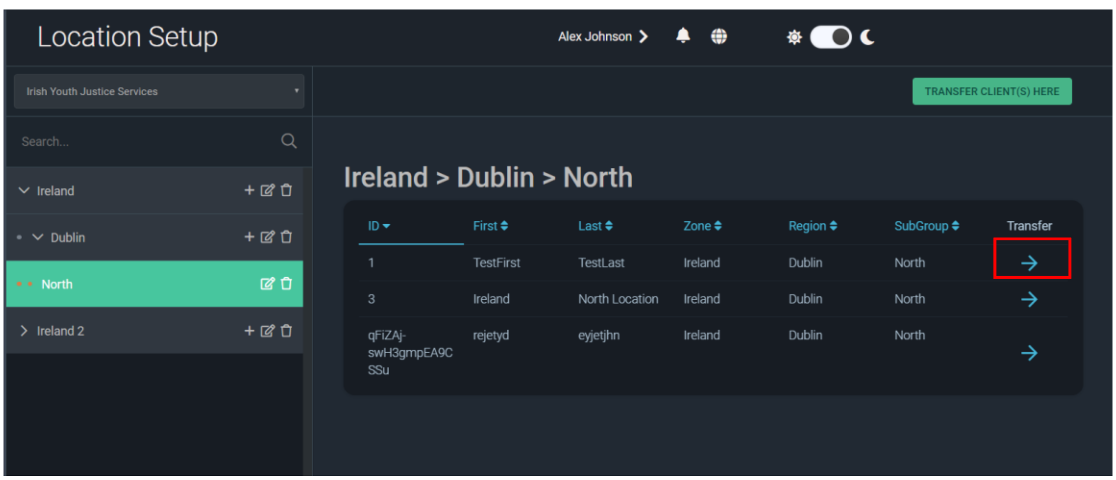
The clients will appear under the subgroup.



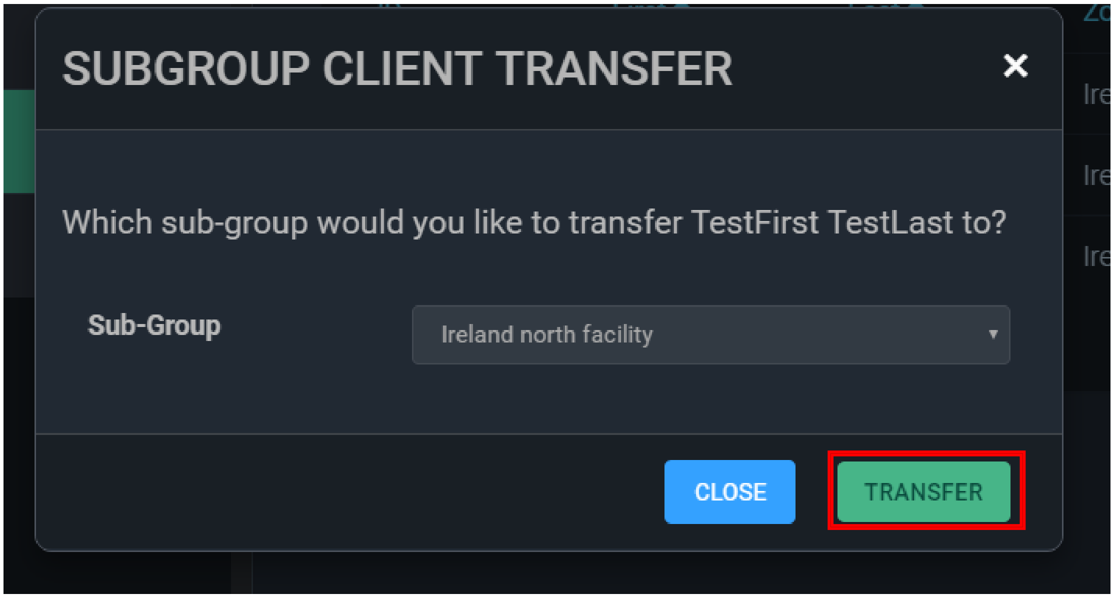
Transfer Client from One Subgroup to Another

Once you are in the Location Setup page

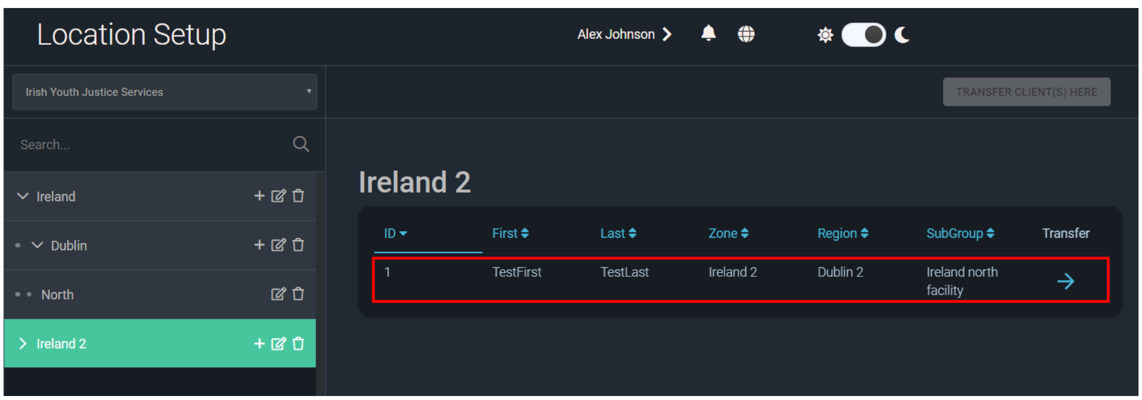
1. Select the subgroup the client currently falls under.
2. Locate the client from the list and click on the transfer arrow beside the client's name.



3. The Subgroup client transfer page will appear. From the drop-down menu, select the Subgroup you would like to transfer the client to.



4. Click Transfer and the client will appear in the new subgroup.

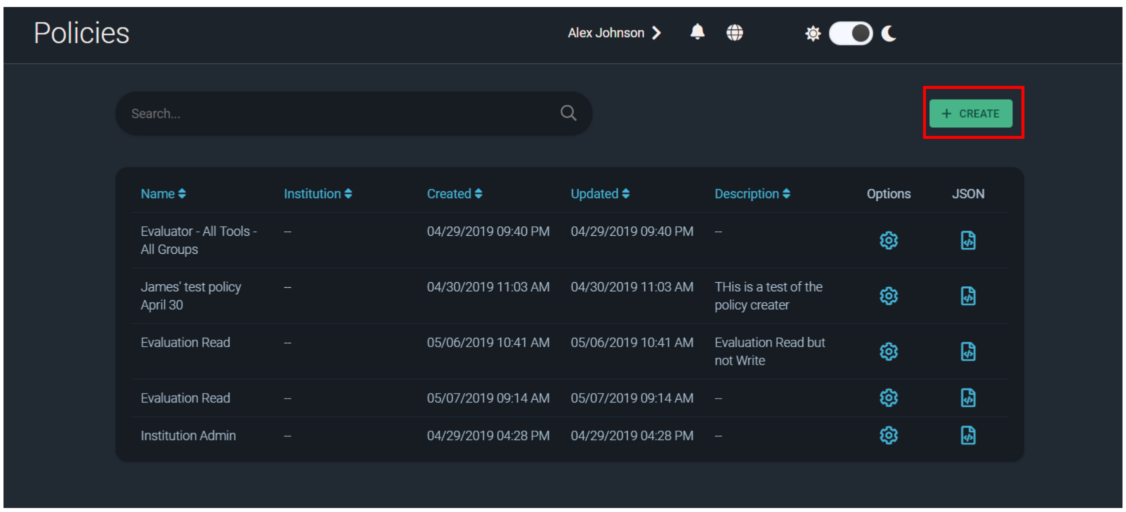


POLICIES

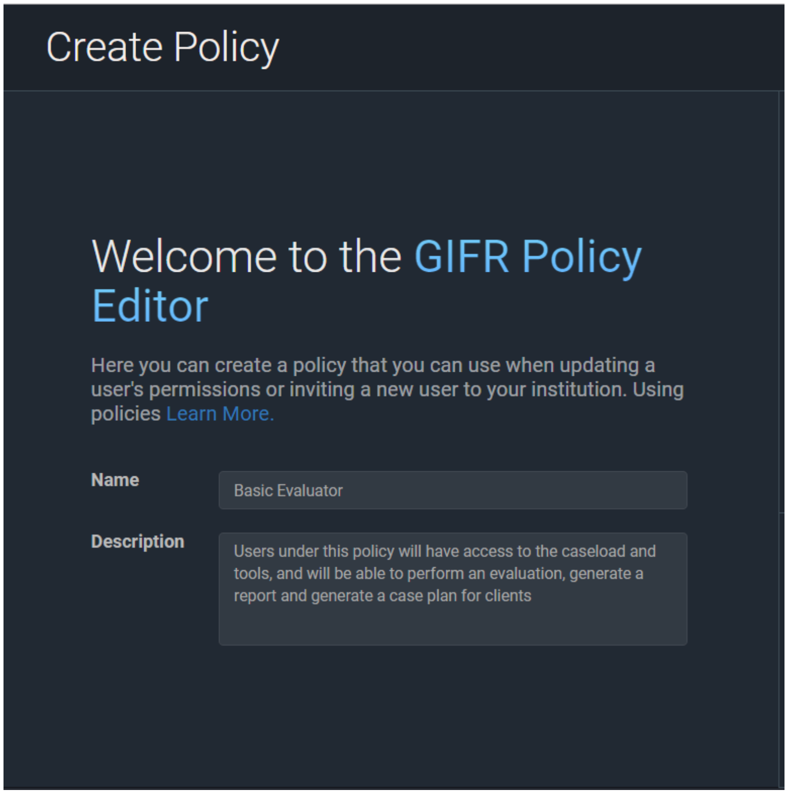
The institution administrator or users with permission have the ability to assign permissions to other users in the institution. To do this, first, you have to create a policy, and secondly, invite a user under that policy.

Create a Policy

1. From the Navigation menu, click Policies.
2. Click the Create button at the top right-hand side of the page. The Welcome to the GIFR Policy Editor page will come up.



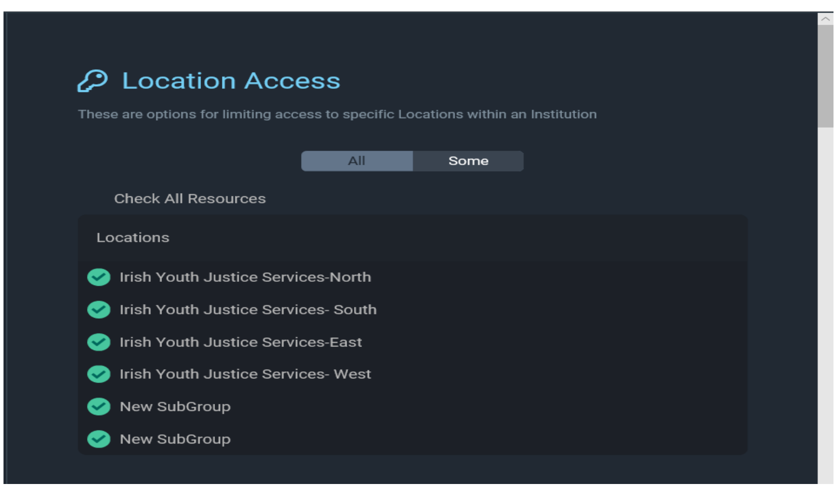
3. Type the name of the policy in the required textbox. For example, "*Basic Evaluator*"
4. Provide a description of the policy in the description box. For example, "*Users under this policy will have access to the caseload and tools, and will be able to perform an evaluation, generate a report and generate a case plan for clients*"



5. Select the functionality you want users under the policy to have access to

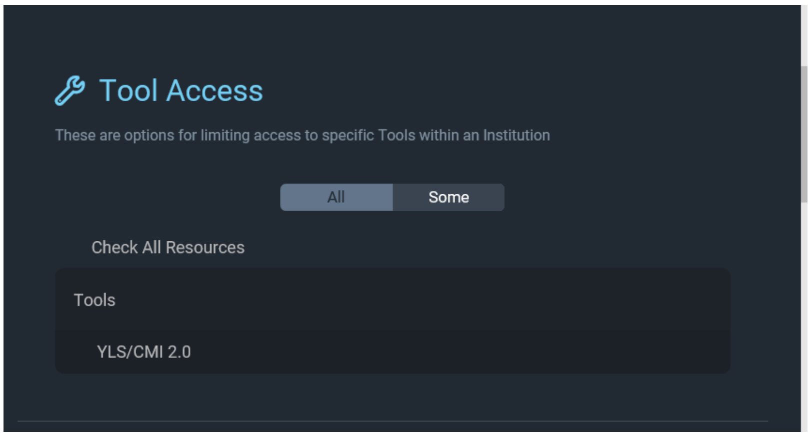
a) Location Access allows you to choose the location that the users under this policy will have access to.

- If you want the users under this policy to have access to all the locations, click the ALL. If you want the user to have access to some locations, click SOME, and select the location(s) you want them to have access to.



b) Tool Access allows you to choose the tools that the Users under this policy will have access to.

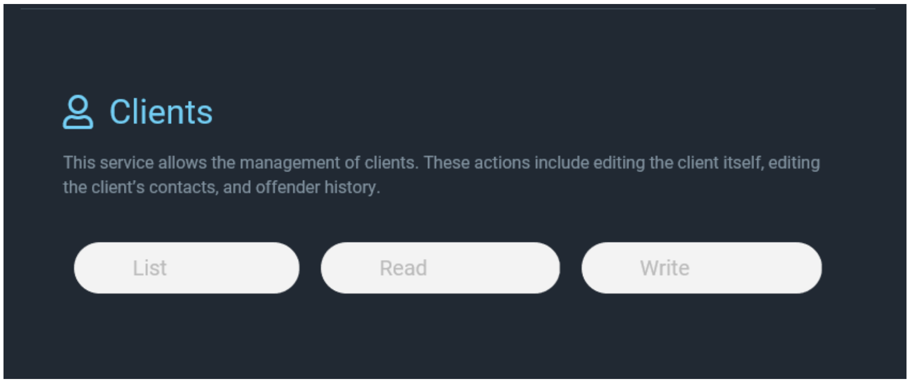
- If you want the users under this policy to have access to all the tools available to your institution, click the ALL. If you want the user to have access to some tools, click SOME, and select the tools(s) you want them to have access to.



	Definition of Key Terms
List	Allows users to grab a full list of items from the services. *For example, a user with List access to Clients can see the list of clients but cannot see specific details about a client.*
Read	Allows users to grab a single item from the list. *For example, a user with Read access to Clients can see specific details about a client such as a client's offense history*
Write	Allows users to create, update and delete items from the service. *For example, a user with Write access to Clients can create a new client and delete clients from the institution*

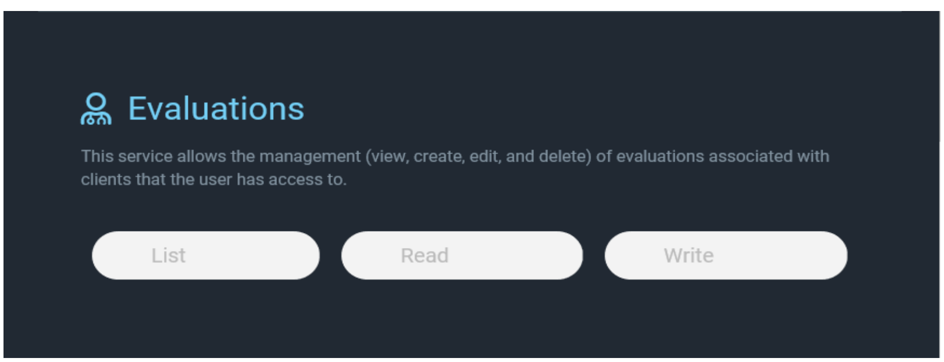
c) Clients allow you to determine if the Users under this policy will have the permission to see the list of clients (List) and/or see the details about each a client (Read), and/or create, update and delete a client (Write).

- Select List and/or Read and/or Write to give Client Access to Users under this policy.



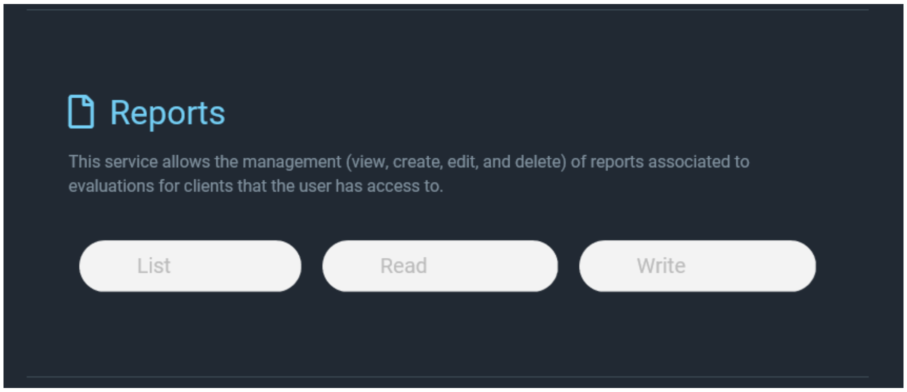
d) Evaluations allow you to determine if the Users under this policy will have the permission to see the list of client's evaluations (List) and/or view a specific evaluation (Read), and/or create and submit a new evaluation (Write) for clients under the user's caseload.

- Select List and/or Read and/or Write to give Evaluation Access to Users under this policy



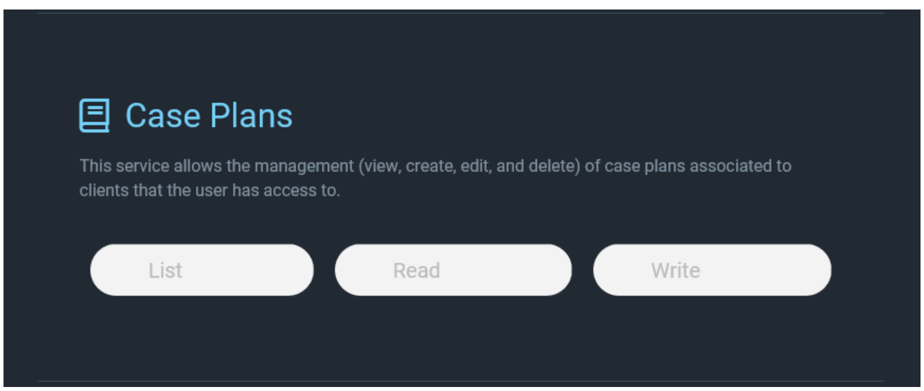
e) Reports allow you to determine if users under this policy will have the permission to see the list reports generated for a client (List) and/or download a report (Read) and/or create and delete report (Write) of clients in the user's caseload.

- Click List and/or Read and/or Write to give Report Access to Users under this policy



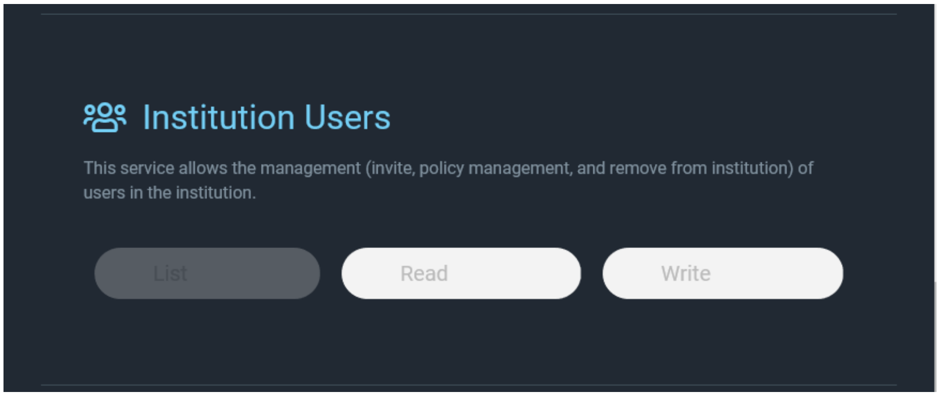
f) Case Plans allows you to determine if users under this policy will have the permission to view client's case plans (List) and/or download a client's case plan (Write) and/or create and delete case plan (Write) of clients in their caseload.

- Click List and/or Read and/or Write to give users under this policy access to the case plans of clients in their caseload.



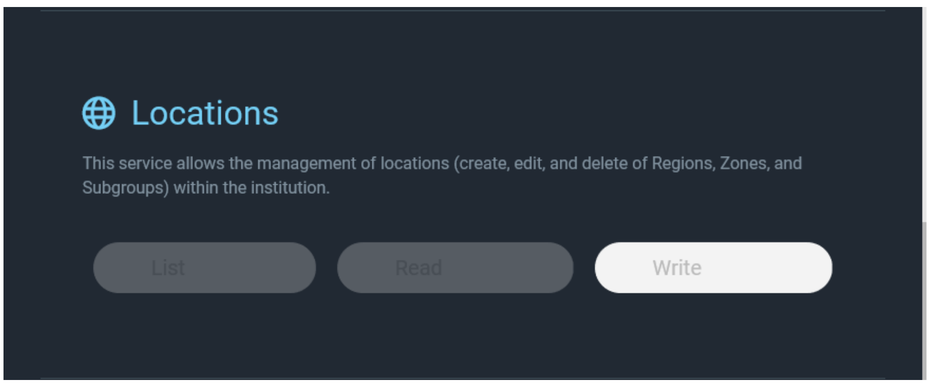
g) Institution Users allows users with this permission to invite (read), manage policy, and remove of the users in the institution (Write)

- Click Read and/or Write to give users access to manage other users in the institution under this policy



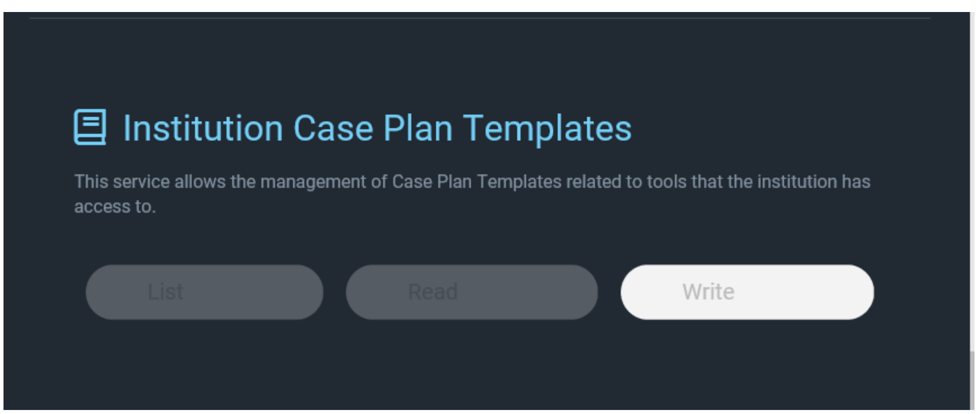
h) Locations allow users with this permission to create, edit, and delete regions, zones, and subgroups within the institution (Write)

- Click Write to give Users access to location management.



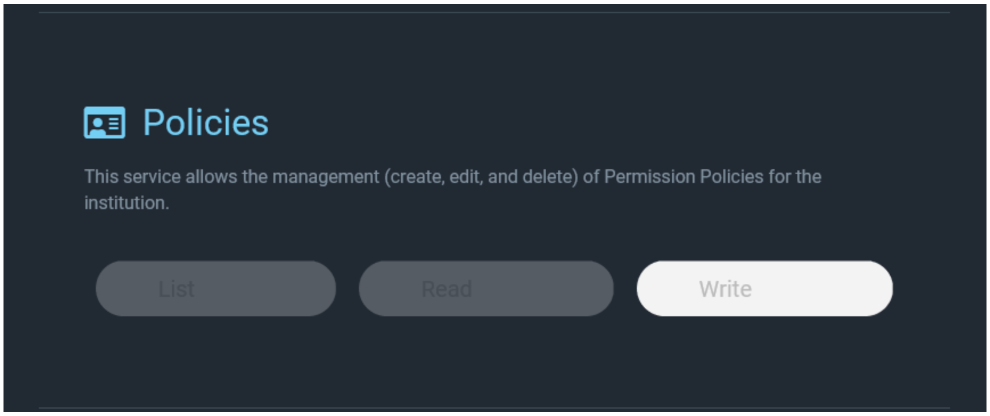
i) Institution case plan templates allow users with this permission to manage the case plan templates related to tools that the institution has access to.

- Click Write to give Users permission to manage the institution's case plan template.



j) Policies give users permission to create, edit and delete policies for the institution.

- Select Write to give Users the permission to manage the institution's policy.



k) Offense Classifications give users the permission to create, edit and delete offense classifications for the institution.

- Select Write to give Users the permission to manage the institution's offense classification

l) Advance Systems Settings

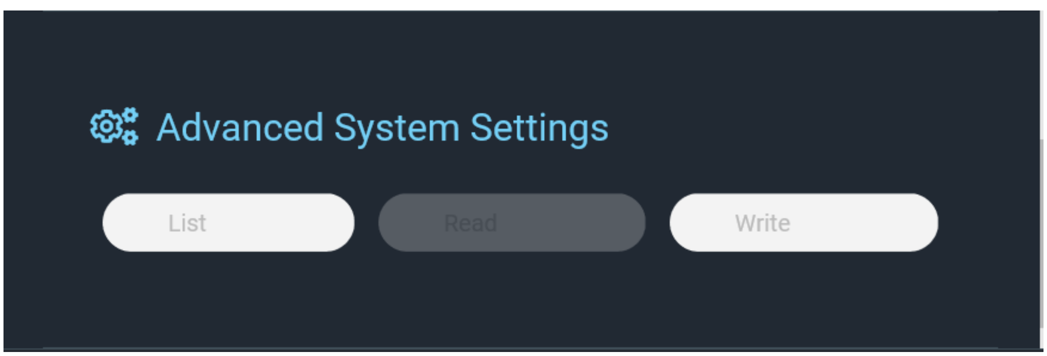


Illustration of Some Users' Policies

The tables below show examples of policies for the basic evaluator and institution administrator.

Basic Evaluator Policy	**Some**		**All**
Location Access	✓		
Tool Access	✓		
	List	**Read**	**Write**
Clients	✓		
Evaluation	✓	✓	✓
Reports	✓	✓	✓
Case Plans	✓	✓	✓

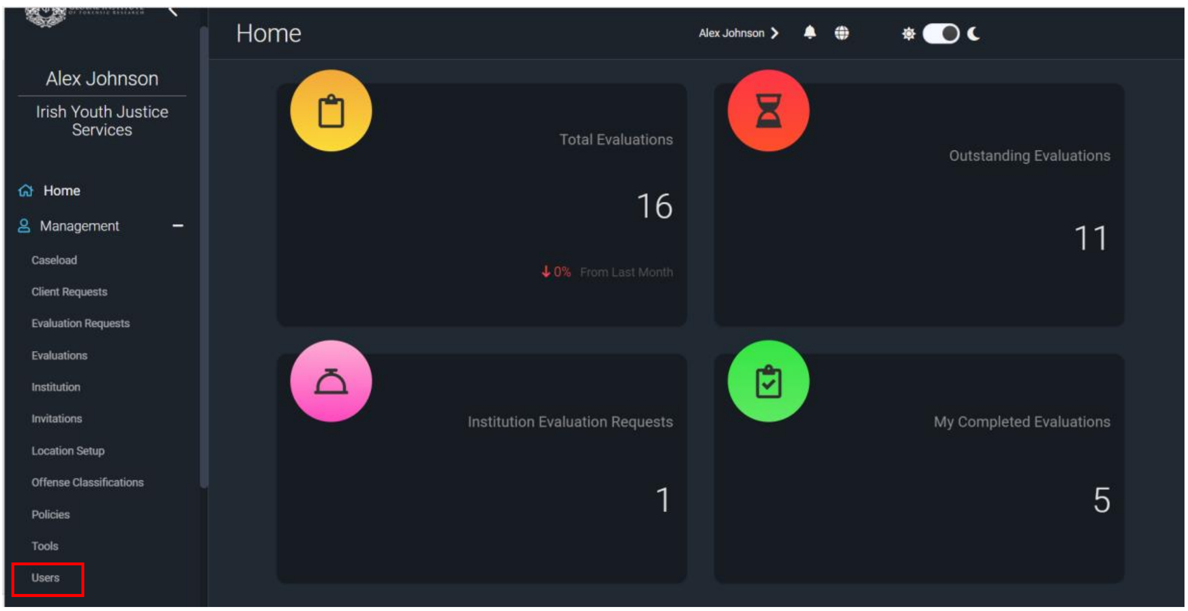
Institution Administrator Policy	**Some**		**All**
Location Access			✓
Tool Access			✓
	List	**Read**	**Write**
Clients	✓	✓	✓
Evaluation	✓	✓	✓
Reports	✓	✓	✓
Case Plans	✓	✓	✓
Institution Users	✓	✓	✓
Locations	✓	✓	✓
Institution Case Plan Templates	✓	✓	✓
Policies	✓	✓	✓
Offense Classifications	✓	✓	✓
Advance Systems Settings	✓	✓	✓

USERS

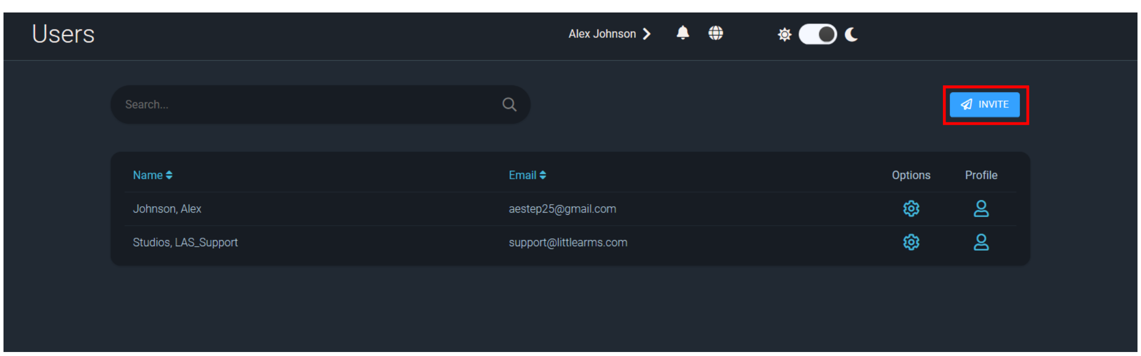
The institution admin and/or users with access to this feature have the ability to create and modify users. A user is an account that you create in the database that uniquely identifies those people who will be administering the assessments available on GEARS. You should create a user for each individual who will be administering assessments in your organization.

Invite a User

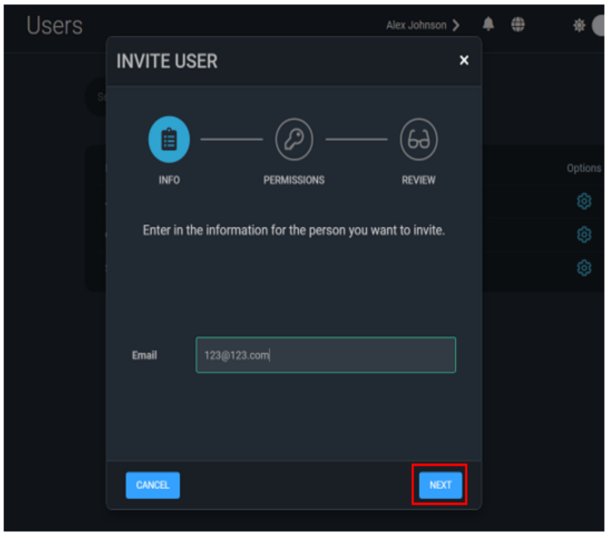
1. From the Navigation menu, click Users.

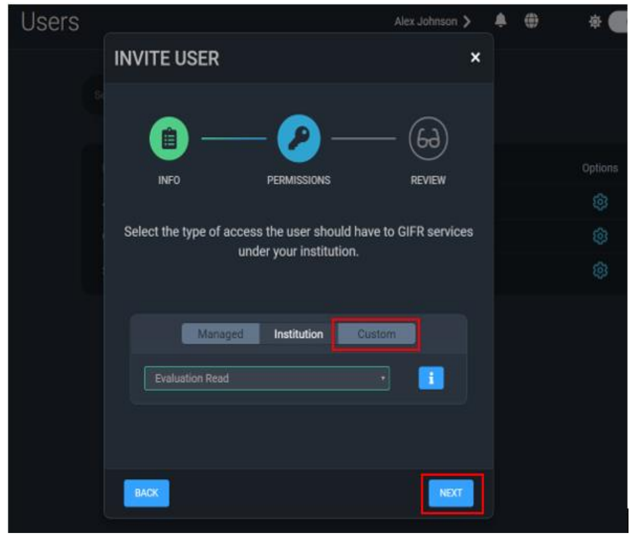


2. On the User listing page, click on Invite. The Invite User page will appear

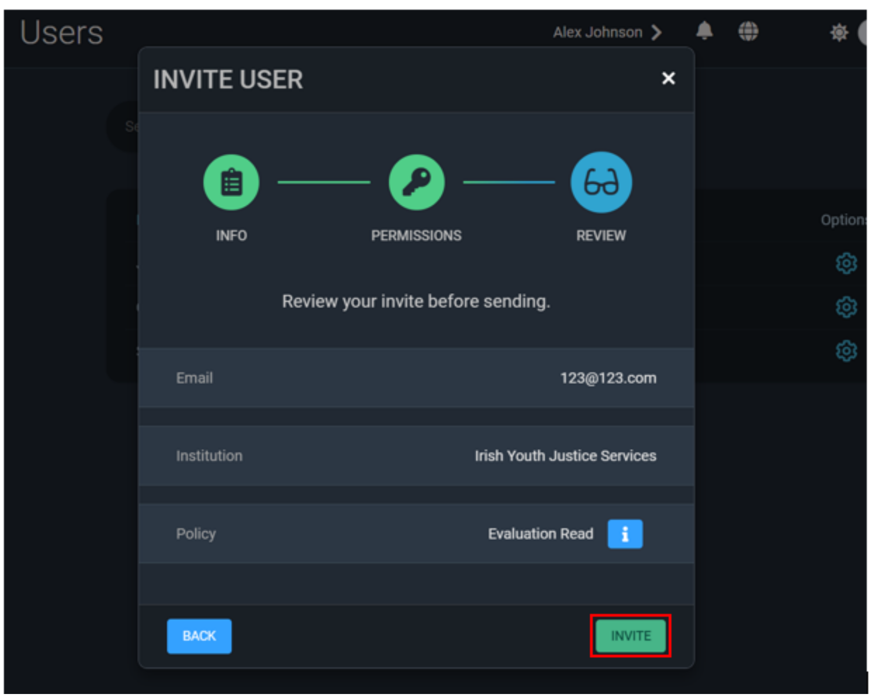


3. Enter the new user’s email address and click **Next**



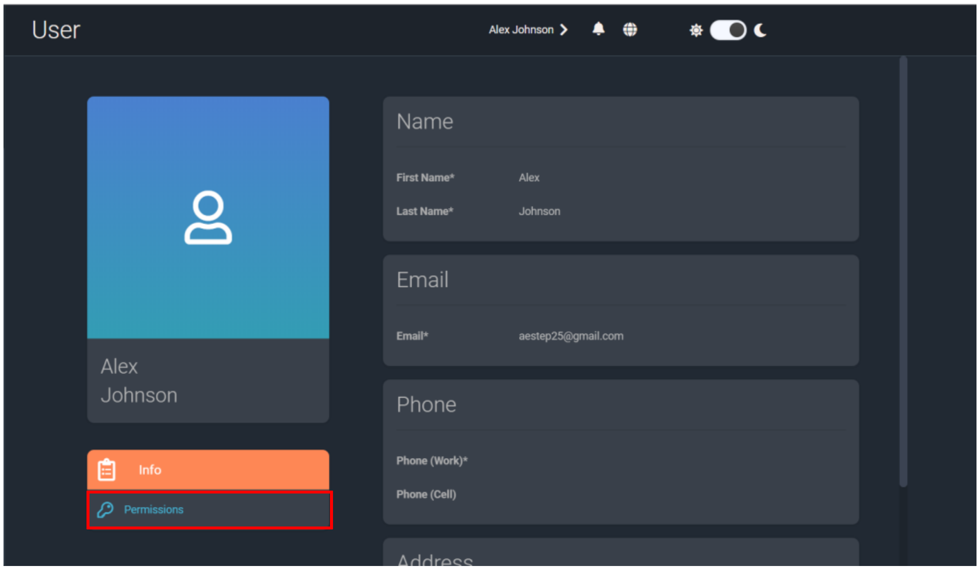


4. Select the policy for the User. Or click the Custom button to create a custom policy for the User.
5. Click **Next** to go to the Review page. Review the email, institution, and policy to ensure the information is correct.
8. Click **Invite**. A link to set up a GEARS profile will be sent to the user's email address. NOTE: This link can be found in the inbox or spam folder.

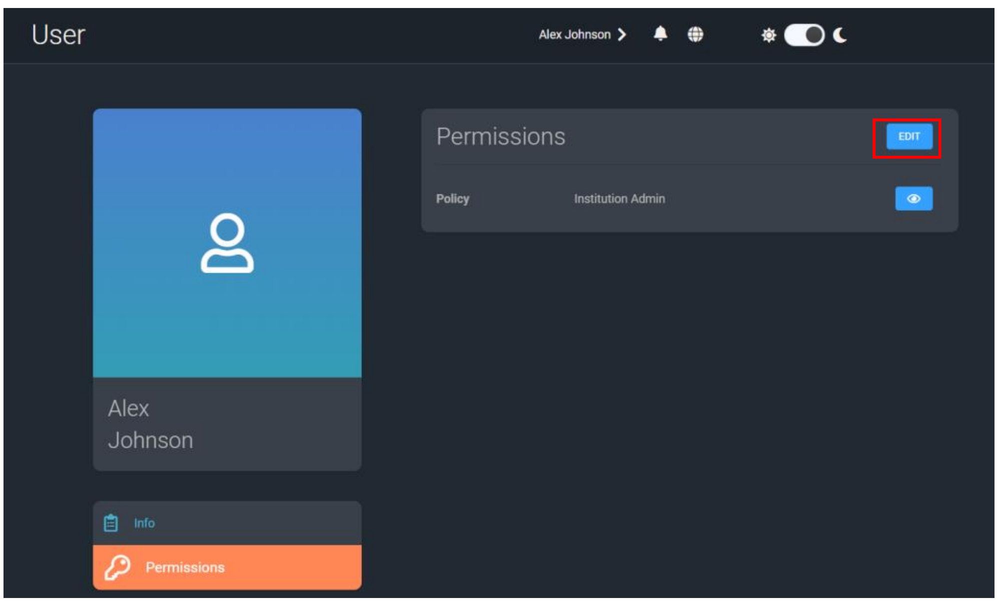


Edit a User's Custom Policy

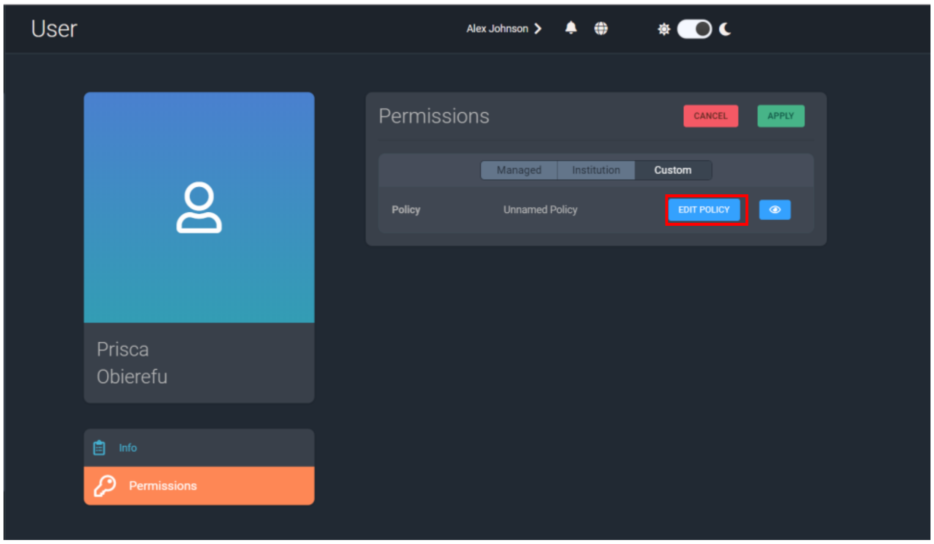
1. From the navigation menu, click **Users**
2. On the user listing page, click on the Avatar icon next to the user's name. This will take you to the user's page.



3. Click **Permissions.**
4. On the permissions page, click **Edit**



5. Click on the **Edit Policy** icon.

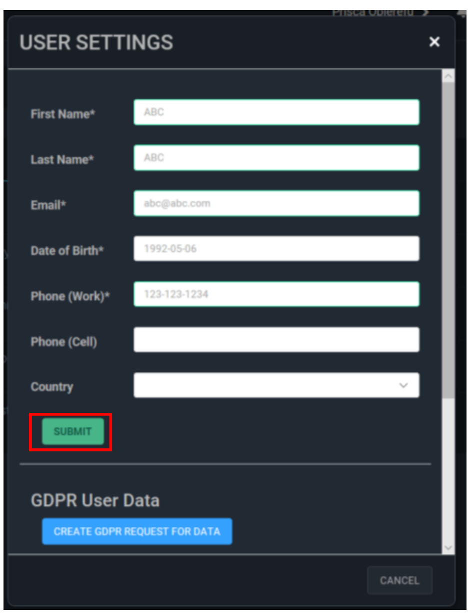


6. Edit the policy and click **Apply**

Edit A User

Users have the ability to their details. To do this:

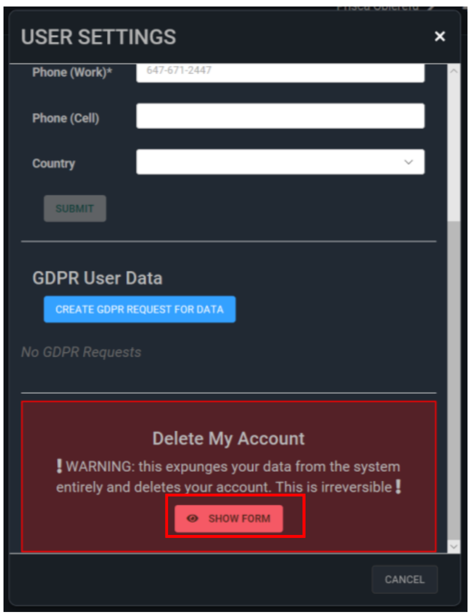
1. From the Users account, click on your name at the top right corner of the screen
2. Click on **User Settings**
3. Edit the required details and click **Submit**

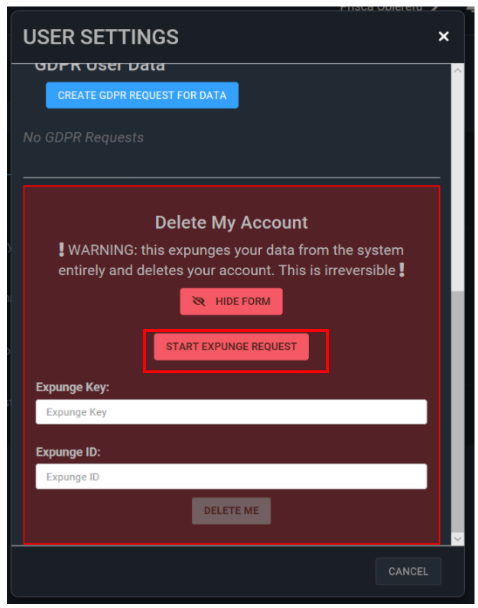


Delete A User

This process expunges the user's data from the system entirely and deletes the user's account. This is irreversible.

1. From the Users account, click on your [name at the top right corner of the screen]
2. Click on **User Settings**
4. Scroll down to the Delete my Account and click **Show Form.**
5. Click **Start Expunge Request.** You will receive an email with a key that you need to enter along with the ID generated to delete your account

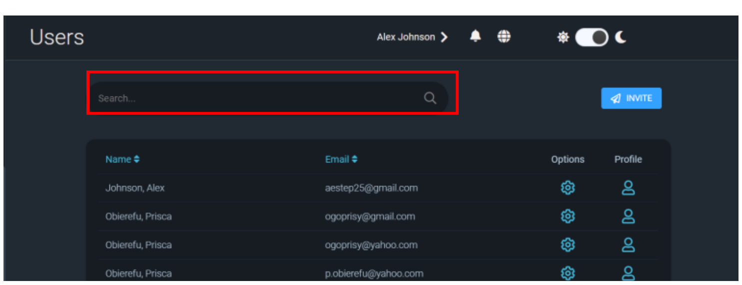




6. Enter the Expunge Key in the required field and click **Delete Me.**

Search for a User

To search for a user within your institution, go to the search button at the top part of the User page and begin typing the user's name or email address, the user will prepopulate.

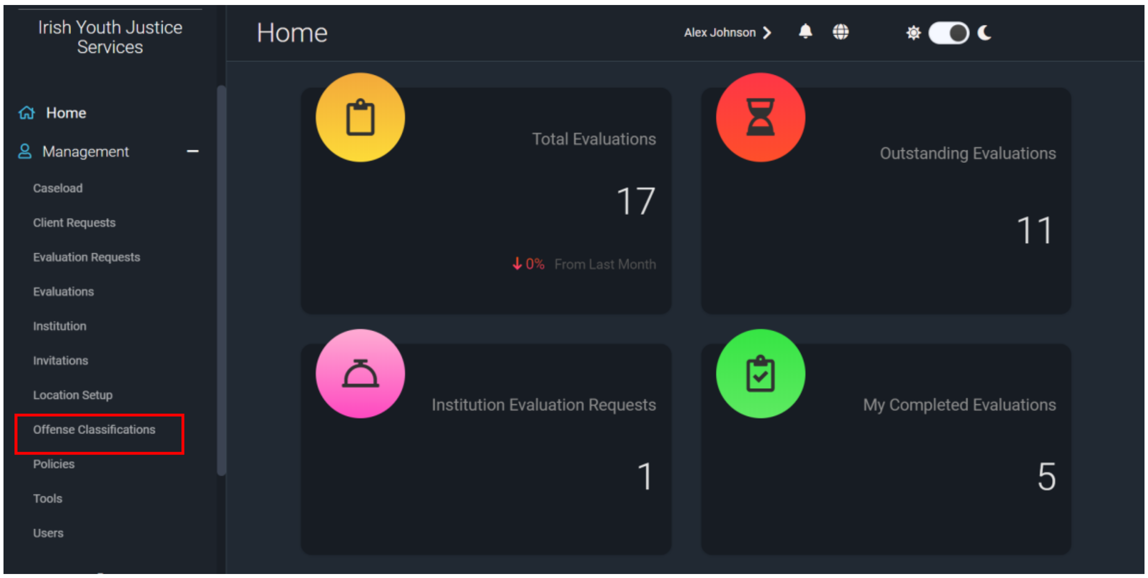


SET UP OFFENSE CLASSIFICATIONS

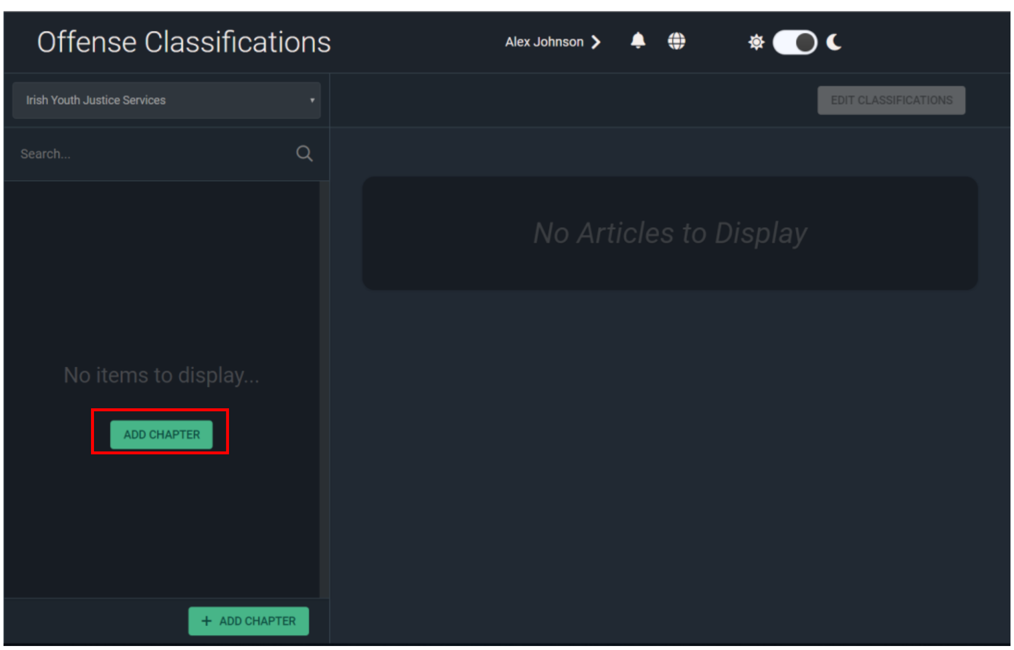
Institution admin and/or users with offense classification permission are able to add offenses to their institution. Offenses added here automatically prepopulate when filling a client's offense history.

To Add the Offense Classification

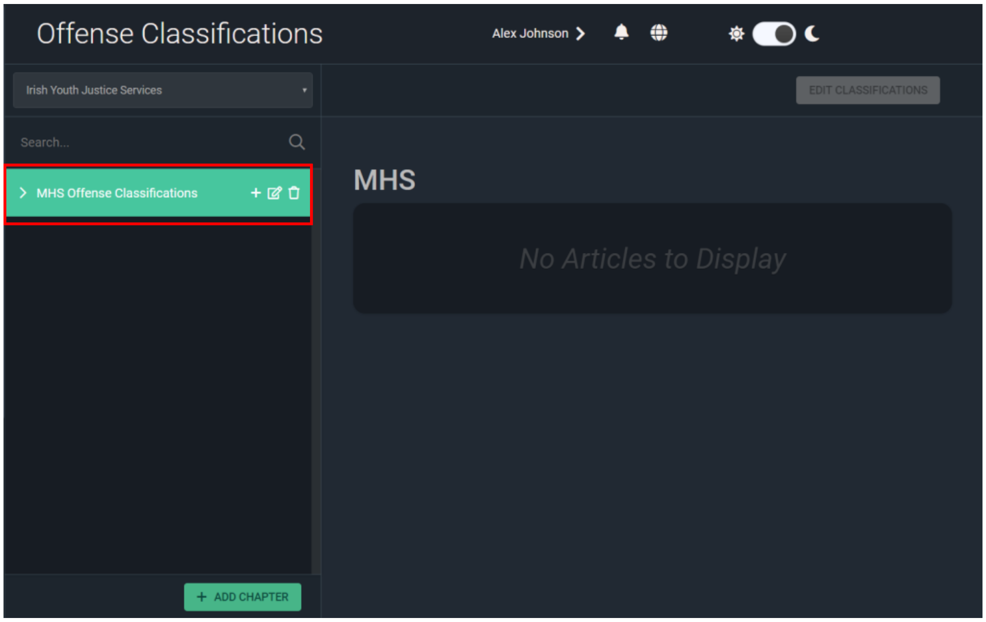
1. On the navigation menu, click Offense Classification.



2. From the flyout menu, click Add Chapter

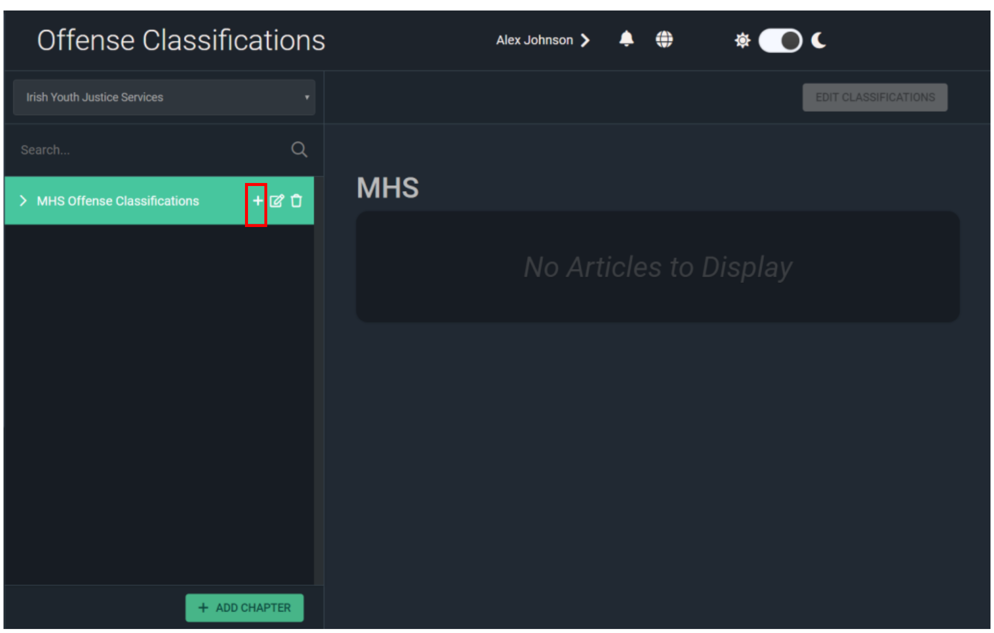


3. Type the name of the offense and click the ✔ icon beside the name to save. The offense will appear in the offense classification.

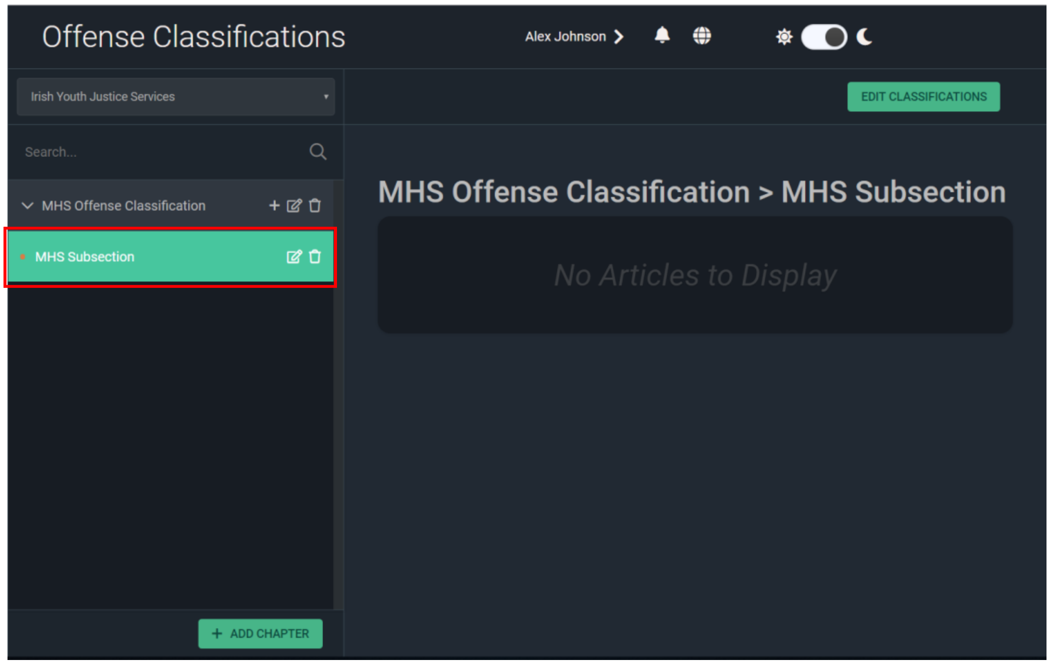


To Set Up a Subclassification Under Each Offense

1. From the Offense Classification list, select the offense of interest.
2. Click the + icon beside the Offense

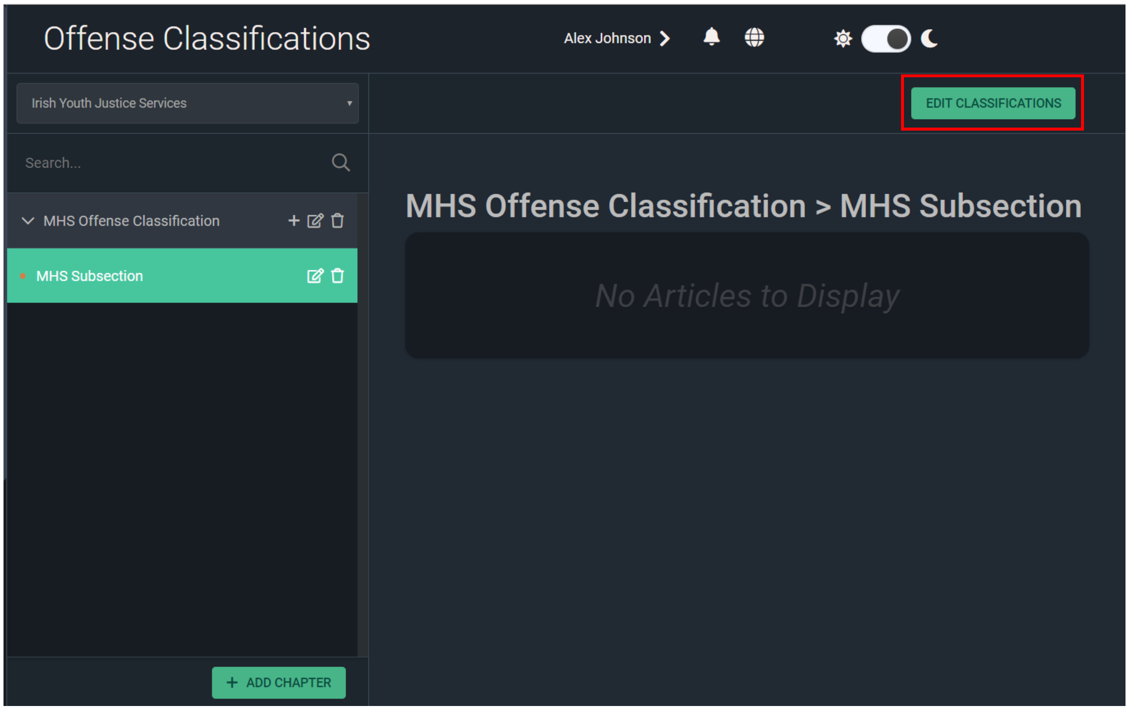


3. Type the name of the subclassification and click the ✔ icon beside the subclassification to save. The new subclassification will appear under the applicable zone.

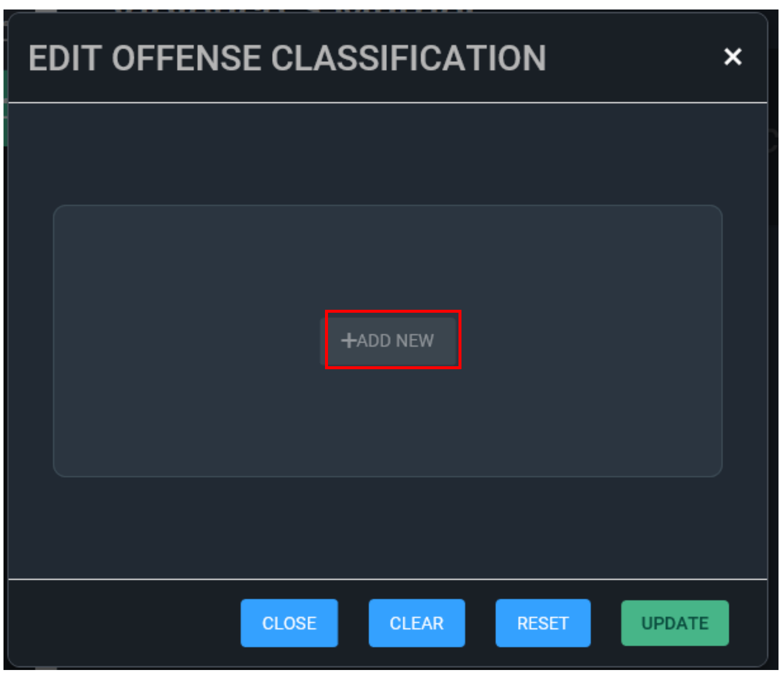


Add Sections Under a Subclassification

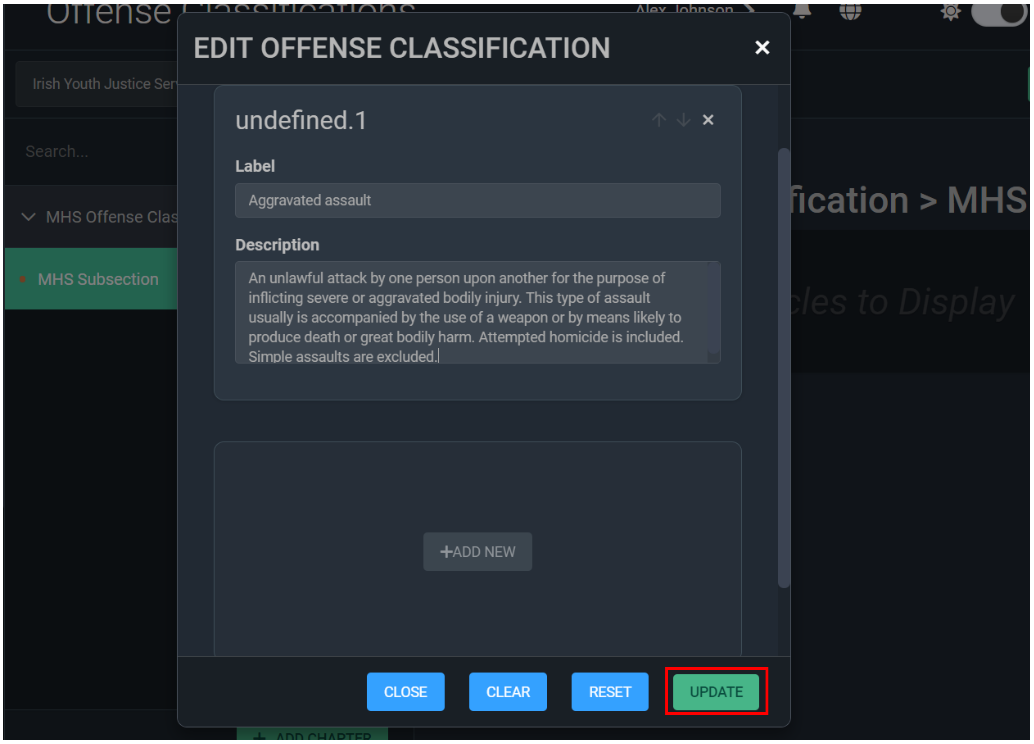
1. Click the subclassification, click **Edit Classification** at the top right-hand side of the page.



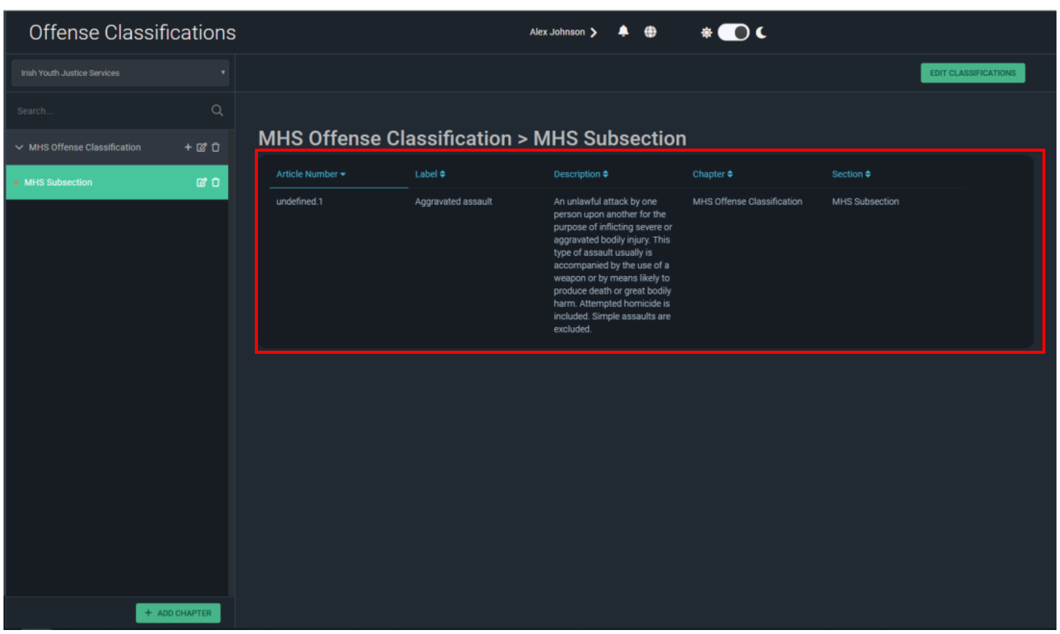
2. The Edit Offense Classification page will automatically pop-up. Click **Add New**



3. Add the offense name in the Label text box and provide a description of the offense in the description text box.



4. Click **Add New** if you wish to add more offenses under the subclassification
5. Click **Update** and the section will appear under the sub-classification



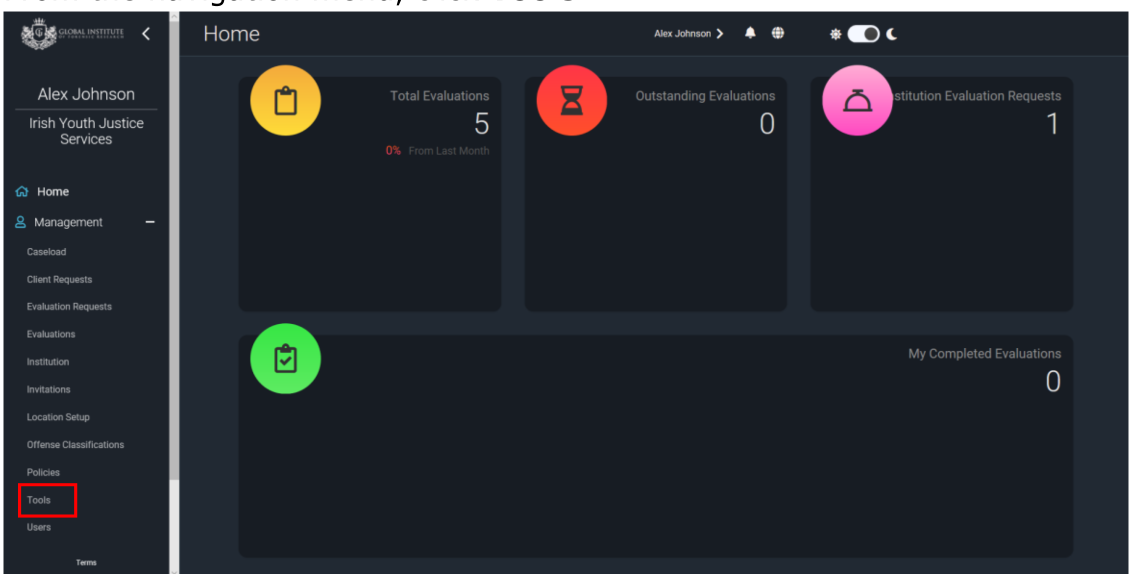
SET UP CASE MANAGEMENT

The GEARS platform allows the Super Admin or users with case management permission to set rules that prepopulate custom intervention and goals based on the assessment results.

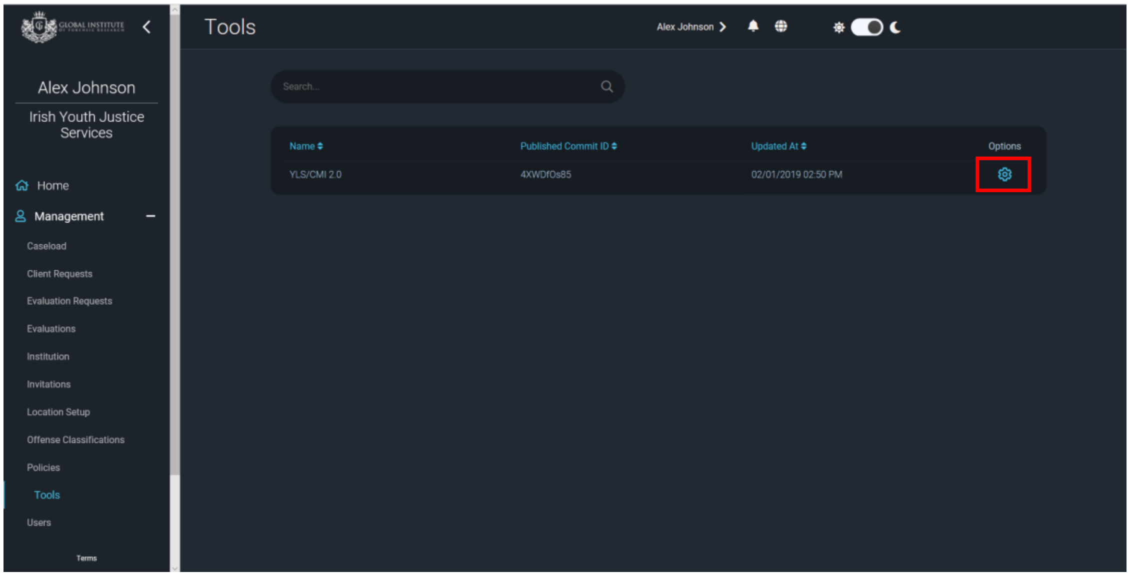
Add A Table Item to the Case Plan Template

The Super Admin or users with case management permission are able to add, delete and edit their institution case plan template. However, it is advisable to maintain the GEARS standardized template because it is formulated based on years of research. If the institution feels the need to change or modify the template, evidence-based practice requires that the changes are based on empirical research findings.

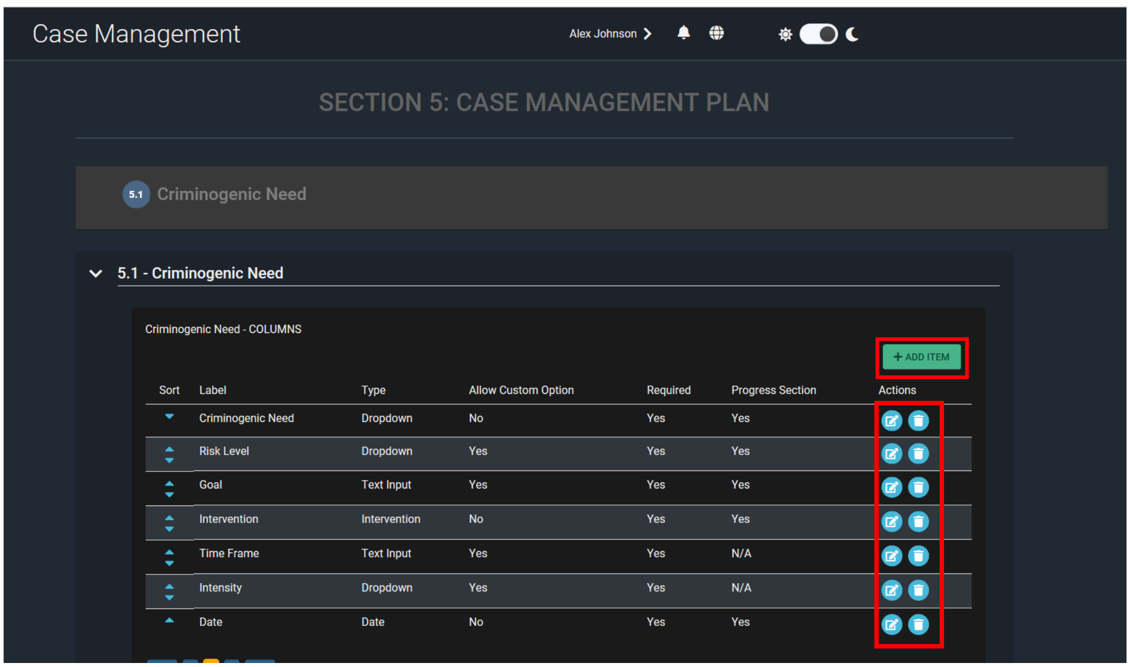
1. From the navigation menu, click **Tools**



2. Click on the GEAR button next to the tool

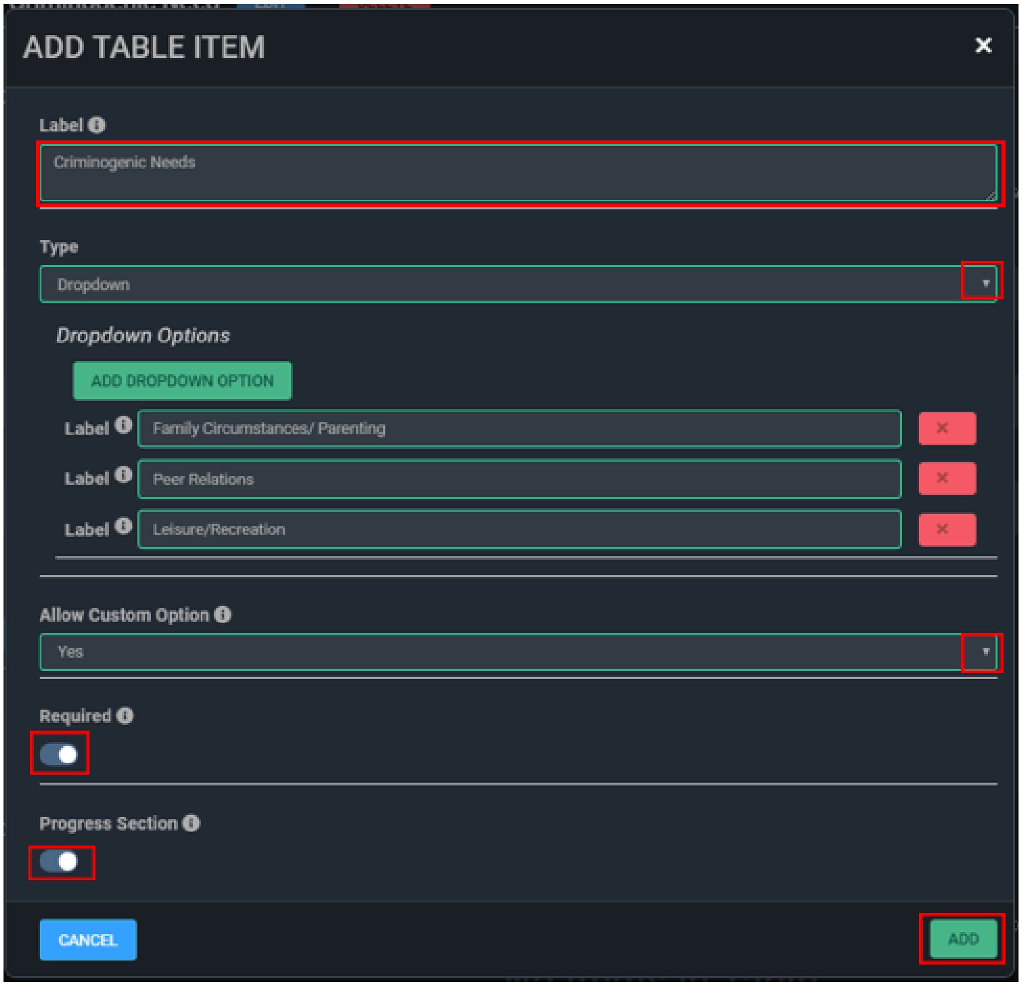


3. Click **Manage Case Plan Template** and the case management plan page will appear.



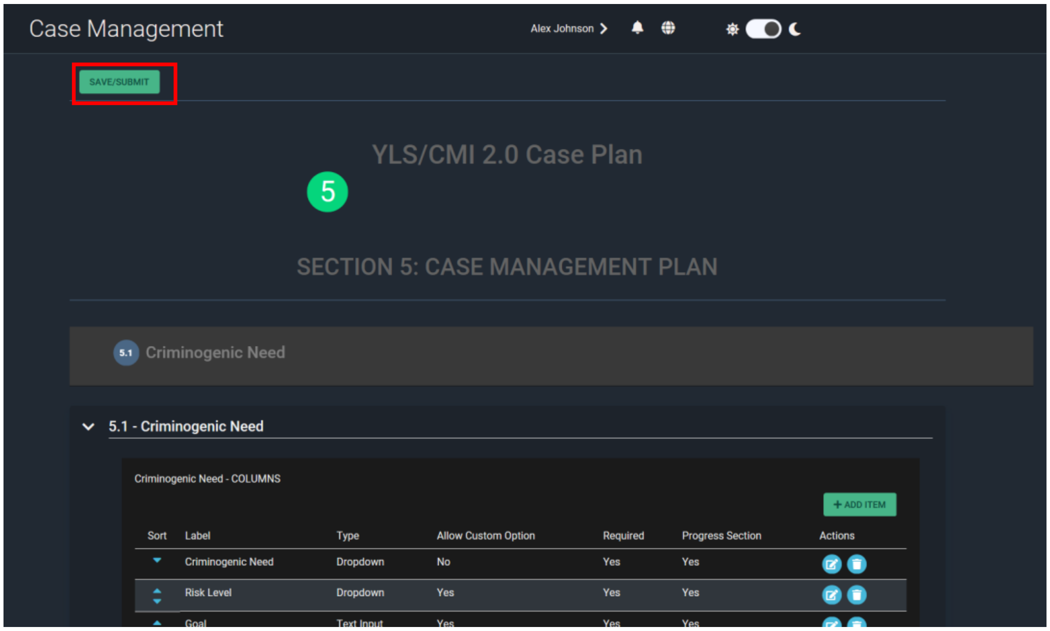
*NOTE: The Super Admin or users with case management permission are able to **Edit** or **Delete** columns by click the edit or delete icons on each column.*

4. Click **Add item** and the Add Table Item page will appear.

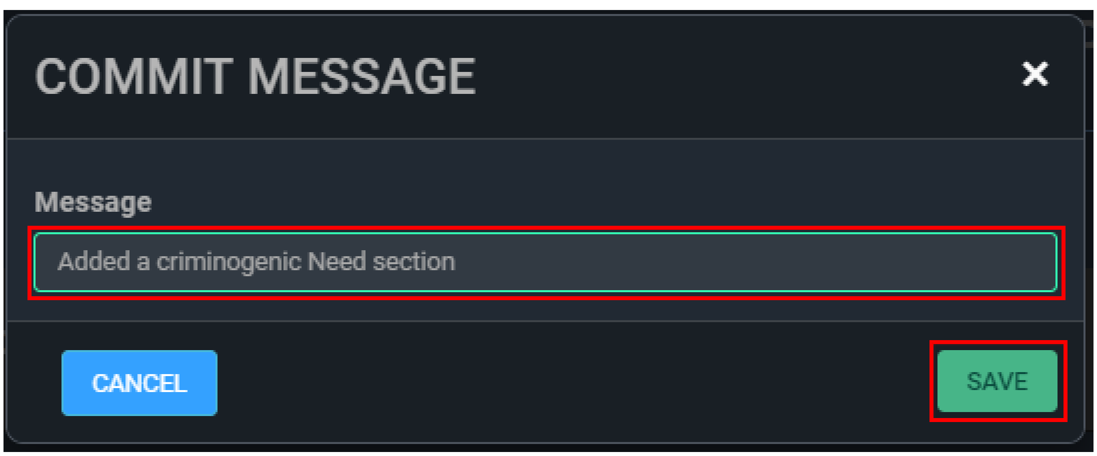


5. Click on the box below **Label** and type the column title.
6. Click the drop-down menu in the **Type** and select the appropriate option. **Drop down** gives the column a drop-down menu, **text Input** allows users input text, **intervention** allows you to input intervention options, select **date** or **date/time** if the column has a time frame. Select **Intensity** if the column requires it.
7. On the Allow Custom Option drop-down menu, select **Yes** if you want evaluators to be able to input their own opinion.
8. Click the Toggle on button for **Required** if the item is required to be filled out when adding it to a case plan recommendation
9. Click the Toggle on button for **Progress Section** if the items should be on its own section on the Progress Tracking table.

10. Click **Add** and the column will appear in the appropriate table on the case management plan
11. Click **Save/Submit**



12. Type the commit message and click **Save**



A commit is a way of keeping track of any edits or changes that have been performed in the system and are matched to users and clients.

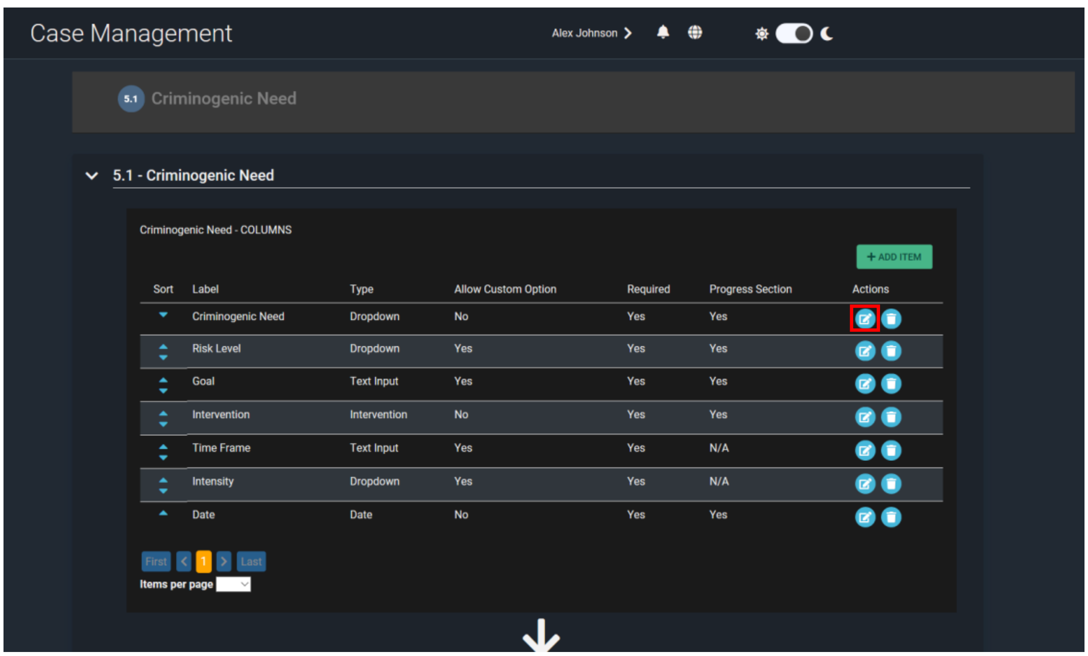
Customizing Case Plan

The GEARS Assessment and Case Management platform allows institution admin or users with permission to customize their institution case plan template by:

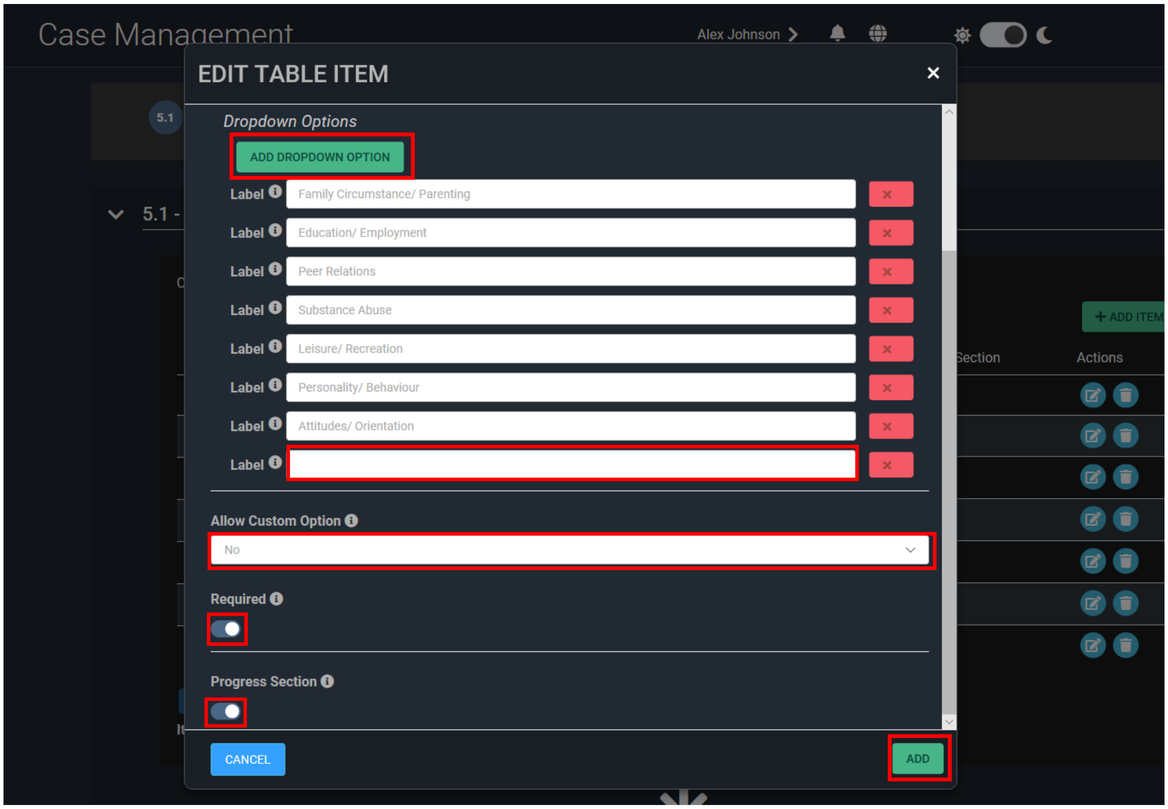
a. Adding additional need section to the drop-down menu,
b. Adding institution custom intervention
c. Adding need-condition rules that prepopulate based on subcomponent risk score and total risk score.

Adding additional need section to the drop-down menu

1. From the case management plan page, click the **edit** button on the criminogenic need column, and the edit table item page will appear.



1. Click **Add dropdown option** and a new label will appear. Type the name of the name of the need
2. On the Allow Custom Option drop-down menu, select **Yes** if you want evaluators to be able to input their own opinion.

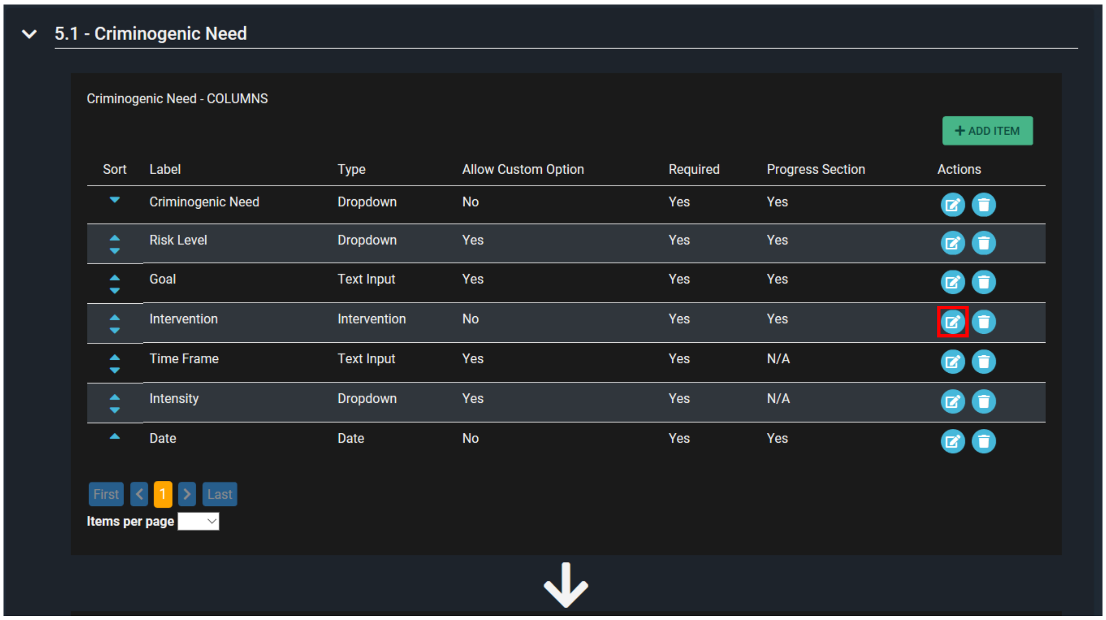


NOTE: To edit a need, click on the need, erase and type the new name

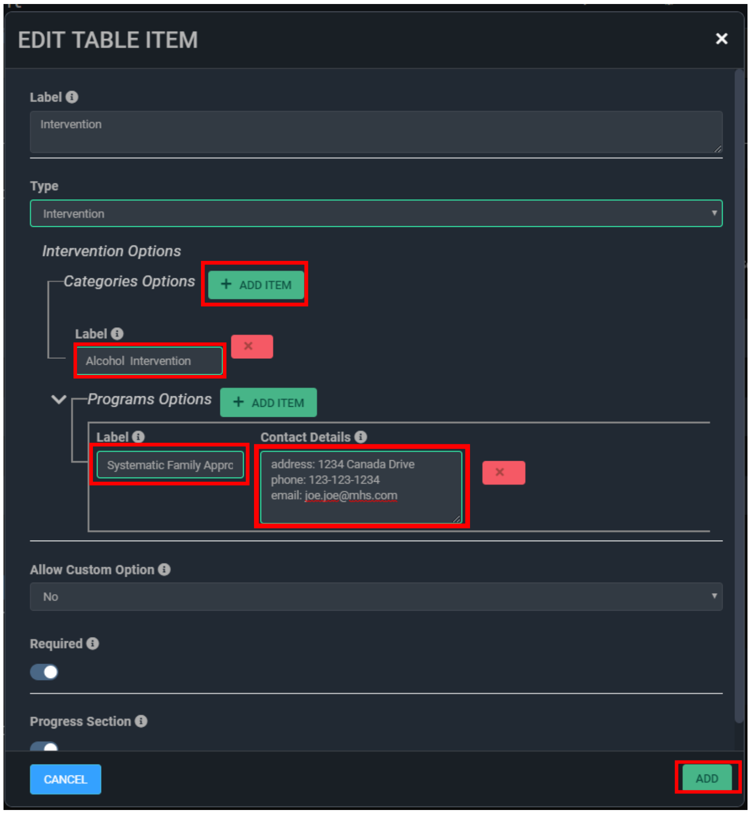
3. Click the Toggle on button for **Required** if the item is required to be filled out when adding it to a case plan recommendation
4. Click the Toggle on button for **Progress Section** if the items should be on its own section on the Progress Tracking table.
5. Click **Add** and the need will appear in the need table of the case management plan
6. Click **Save/Submit**
7. Type the commit message and click **Save**

Add Custom Interventions

1. From the case management plan page, click the **edit icon** on Intervention. The edit table item page will appear.



2. Click **Add item** and type intervention name under the categories option (e.g. Alcohol Intervention). *Click the **Add item** beside the categories options to add more intervention*
3. Type a recommended program under the program options (e.g. Systematic Family Approach) and type the contact details of the recommended program. Click **Add item** beside program options to add more recommended programs

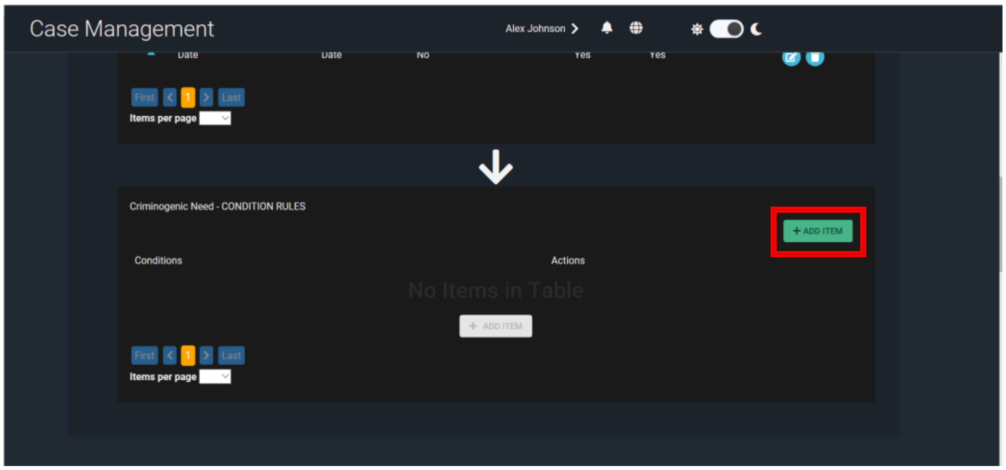


8. Click **Add** and the intervention will appear under intervention
9. Click **Save/Submit**
10. Type the commit message and click **Save**

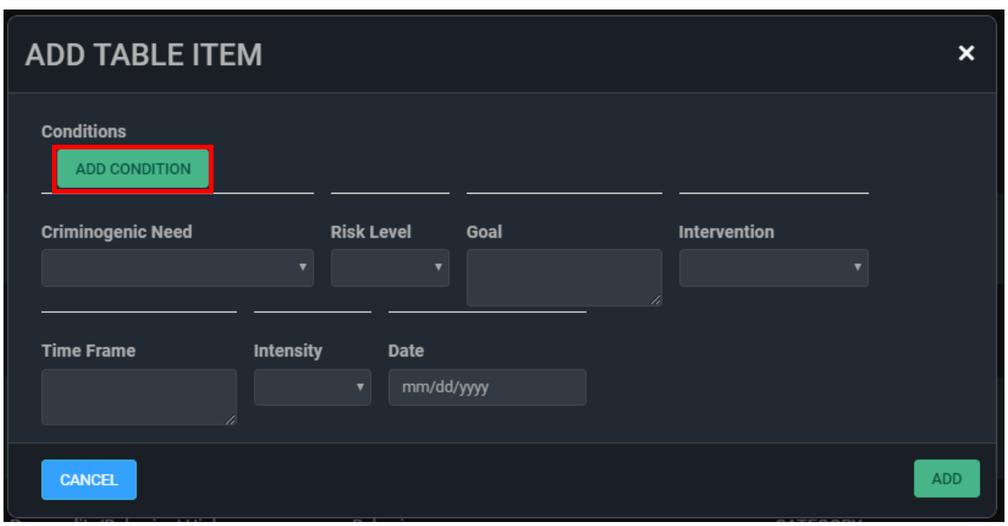
Add Need-Condition Rules

These condition rules also called the IF-THEN rules prepopulate custom intervention and goals based on the assessment results and client's information.

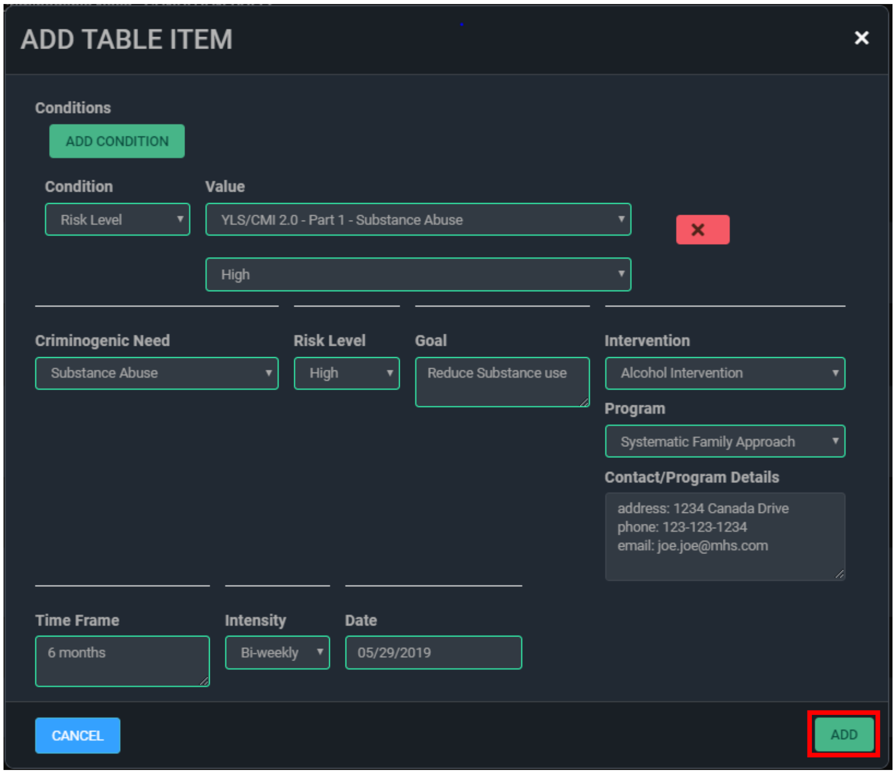
1. From the case management plan page, scroll down to the Need- Condition Rules section and click **Add Items** and the Add Table page will appear.



2. Click **Add Condition** and the condition box will appear



3. Click the drop-down menu on the condition box and a select the required **condition** and **value.**
4. Under the criminogenic need, fill the boxes as you would want it to appear on the case plan and click **Add**. The intervention, program and contact details prepopulates based on the information you input in intervention



In the image above, I set up a condition rule that:

IF

The risk level of YLS/CMI 2.0 Part 1: Substance Abuse is High,

THEN

Once a case plan is generated for an individual who is high risk for substance abuse, their case plan will populate as follows:

Criminogenic need - Substance Abuse
Risk level - High
Goal - Reduce substance use
Intervention – Alcohol Intervention
Program – Systematic Family Approach
Contact/Program Details–Address:1234 Canada Dr.
Phone: 123-123-1234
Email: joe.joe@mhs.com
Time Frame – 6 months
Intensity – Biweekly

Populates from intervention

When you click **Add**, the condition will appear on the Need-Condition Rules section.

Criminogenic Need - CONDITION RULES

+ ADD ITEM

Conditions	Criminogenic Need	Risk Level	Goal	Intervention	Time Frame	Intensity	Date	Actions
• Risk Level | YLS/CMI 2.0 - Part 1 - Family Circumstances/Parenting | High	Family Circumstance/ Parenting	High	Improve relationship with biological father	NO CATEGORY FOUND	6 months	Weekly	05/20/2019	
• Risk Level | YLS/CMI 2.0 - Part 1 - Education/Employment | High	Education/ Employment	High	To attain GED	NO CATEGORY FOUND	until GED is achieved	Daily		
• Risk Level | High	Family Circumstance/ Parenting	High	Improve relationship with Mother	NO CATEGORY FOUND	6 months	Weekly		
• Risk Level | YLS/CMI 2.0 - Part 1 - Substance Abuse | High • Sex | male	Substance Abuse	High	To treat chronic drug use	NO CATEGORY FOUND	on going	Daily		
• Risk Level | YLS/CMI 2.0 - Part 1 - Personality/Behavior | High	Personality/ Behaviour	High	attend CBT	NO CATEGORY FOUND	3 months	Weekly		
• Risk Level | YLS/CMI 2.0 - Part 1 - Leisure/Recreation | High	Leisure/ Recreation	High	improve use of spare time	NO CATEGORY FOUND	1 year	Daily		
• Specific Answer |	Substance Abuse	Low	Reduce chronic alcohol use	NO CATEGORY FOUND	6 months	Monthly	05/01/2019	
• Specific Answer |	Substance Abuse	High	Reduce chronic drug use	NO CATEGORY FOUND	6 months	Monthly	05/01/2019	
• Risk Level | YLS/CMI 2.0 - Part 1 - Substance Abuse | High	Substance Abuse	High	Reduce substance abuse	NO CATEGORY FOUND	6 months	Monthly	05/01/2019	
• Risk Level | YLS/CMI 2.0 - Part 1 - Substance Abuse | High	Substance Abuse	High	Reduce Substance use	Alcohol Intervention | Systematic Family Approach	6 months	Bi-weekly	05/29/2019	

CASELOAD

Caseload is where each client's files are organized. Several different functions are accomplished within the caseload option in GEARS.

At this level, you can

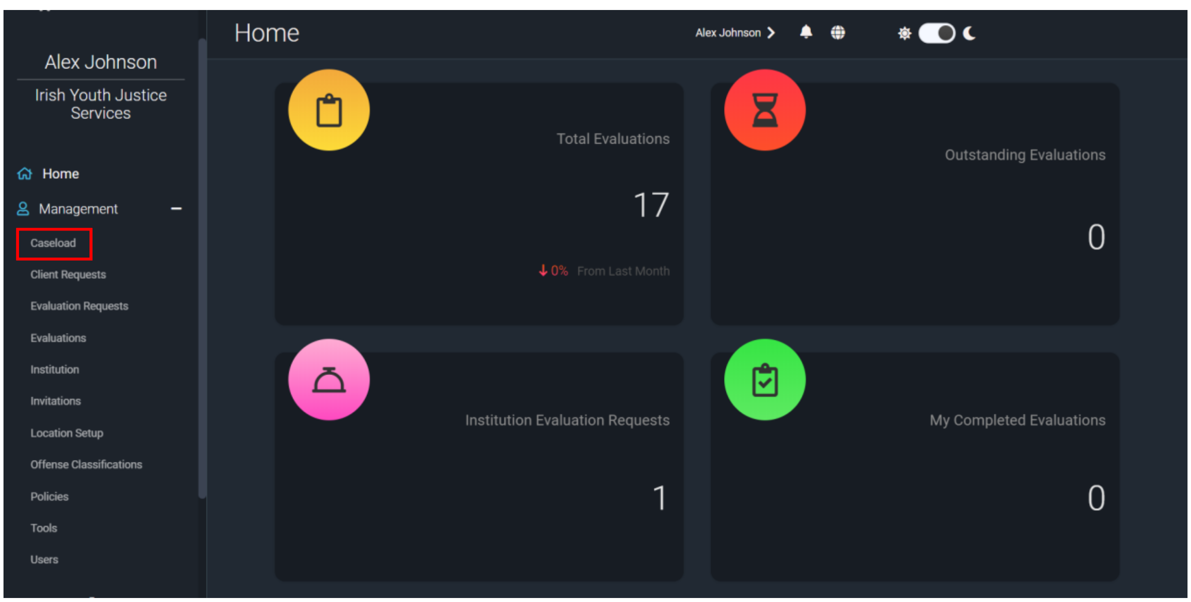
- Create a new client, import a list of clients, request transfer of client, search a client
- Complete offender history
- Complete new Evaluations
- Generate case plans

CREATING A NEW CLIENT

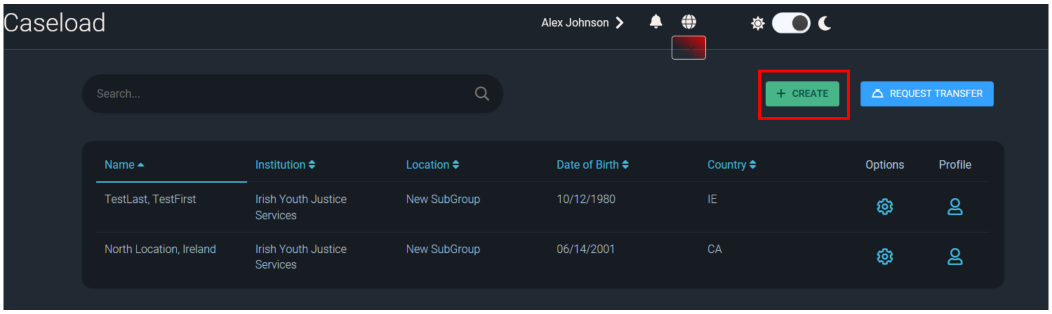
Before performing an evaluation, a client must be created.

Create a New Client

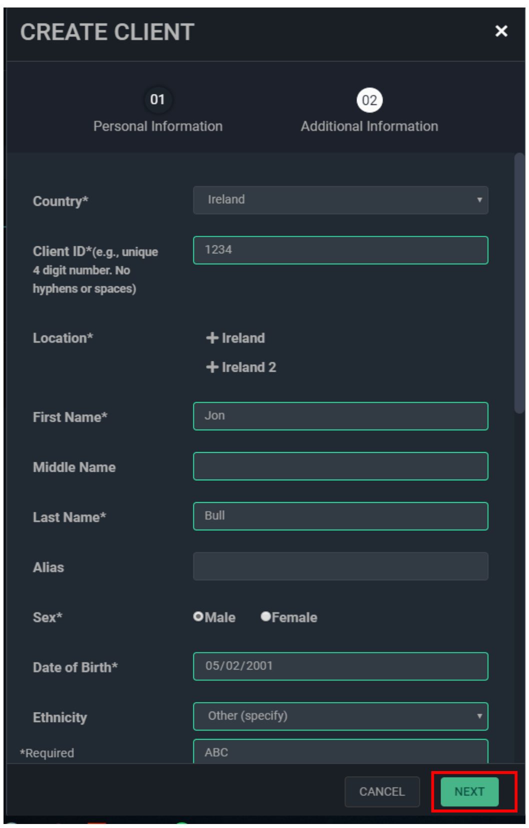
1. From the navigation menu, click **Caseload**. This opens the client listing page - a page that lists all the clients in your caseload.

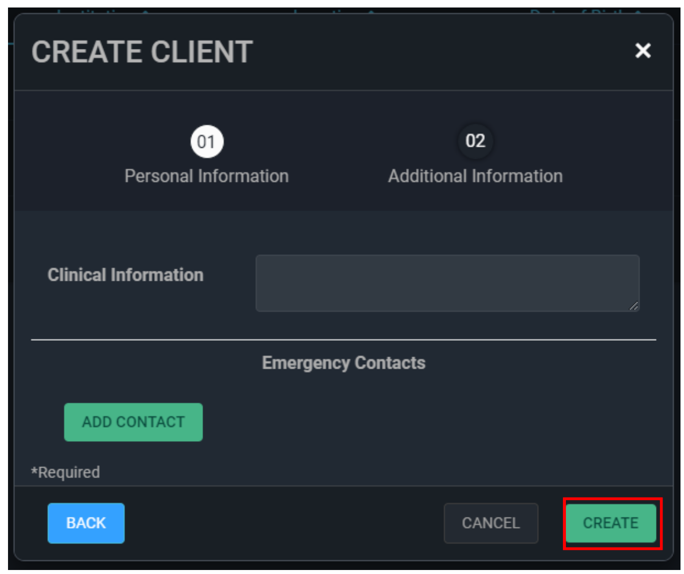


2. Click **Create**

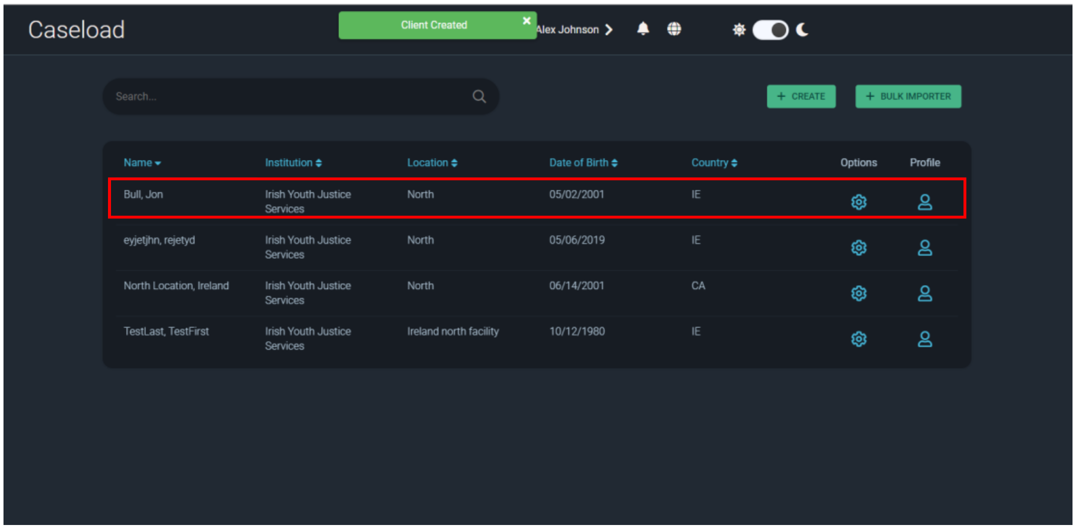


3. Complete the boxes on the Personal Information page. Country, Client ID, First Name and Last Name and Sex are required fields.





4. Select the location to which the client belongs. Click the + icon to expand the topic tree.
5. Click **Next** to fill the additional information
6. Click **Add Contact** to add the client's emergency contact
7. Click **Create** and the client will appear in the list of clients.

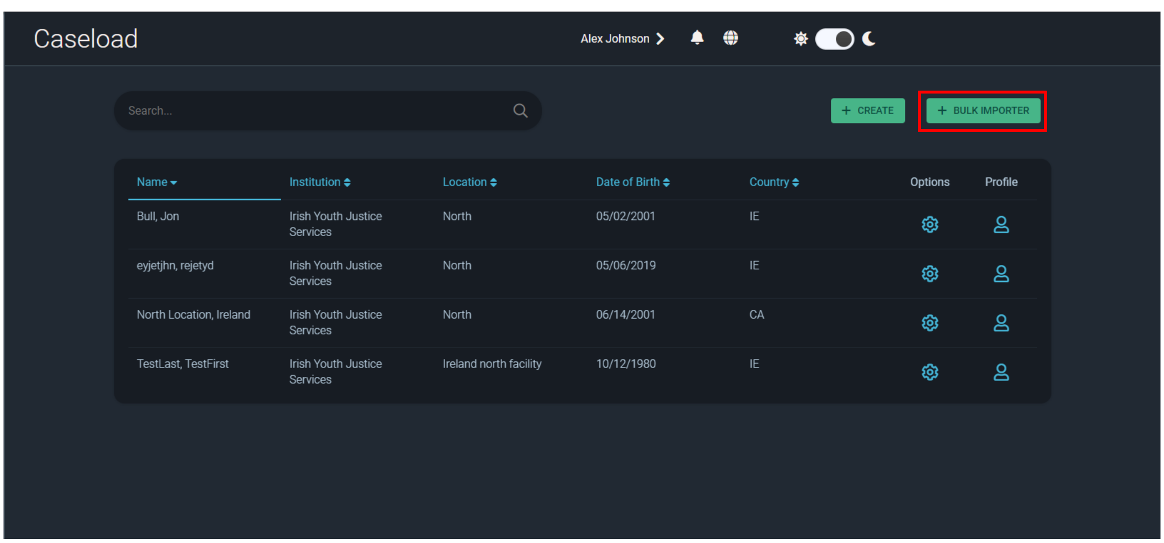


Import a List of Clients

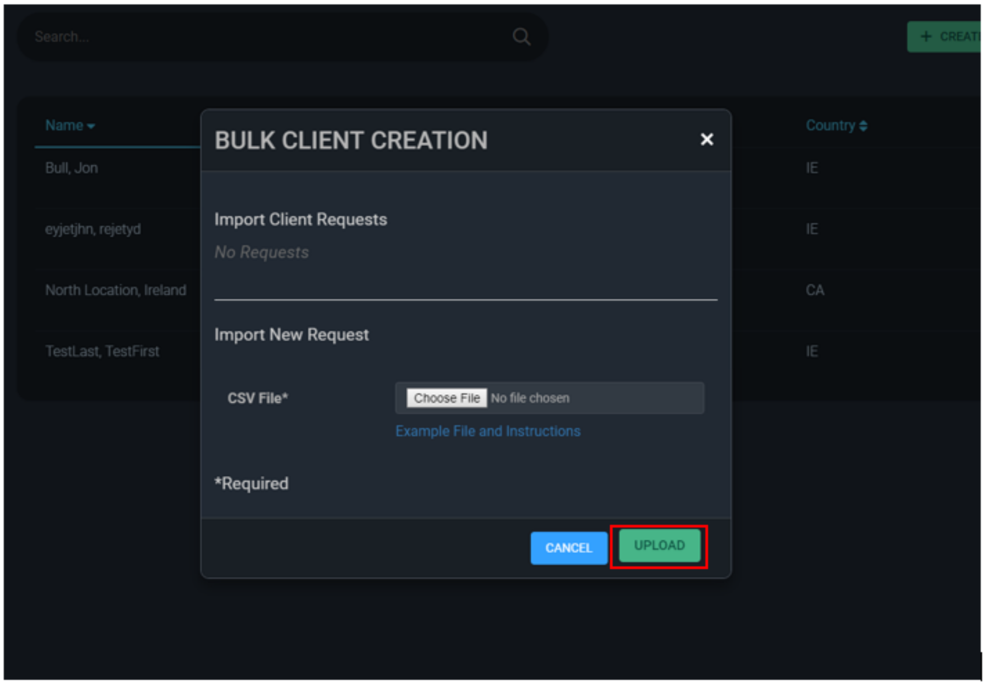
As an alternative to adding clients one-at-a-time, you can upload a list of multiple clients using the **Bulk Importer** functionality.

To import a list of clients:

1. On the client listing page, click Bulk Importer. This opens a Bulk Client Creation page



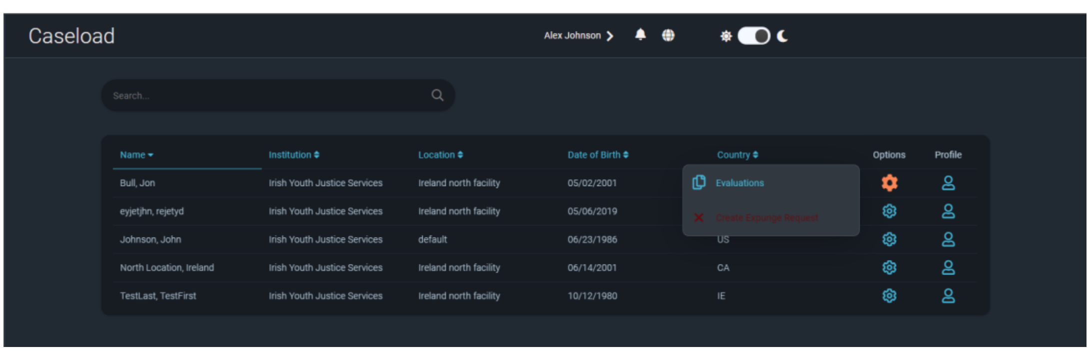
2. Click **Example File and Instructions**. A file containing the instructions about importing clients and the types of acceptable files will be downloaded to your PC.
3. Click **Choose File** and choose the file containing the clients you want to import.



4. Click **upload** and the clients will appear in the client listing page

Delete a Client

1. Click on the gear icon next to the client's name
2. Click **create an expunge request**

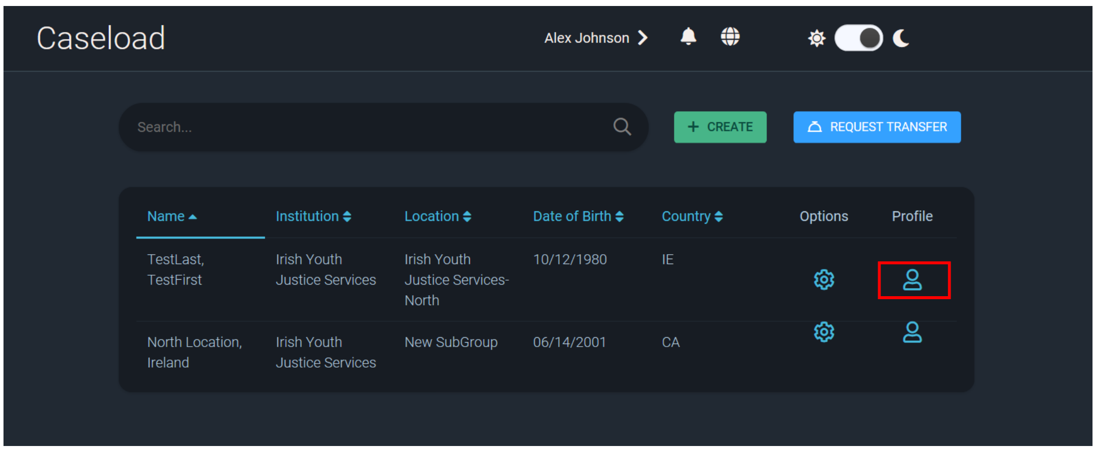


OFFENDER HISTORY

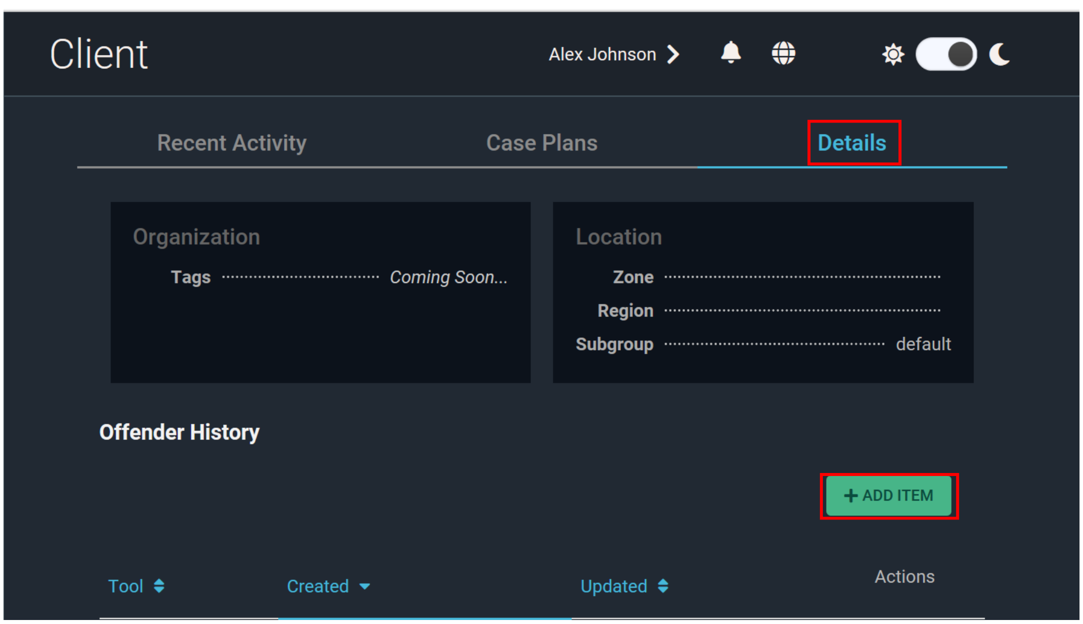
The Offender History stores valuable background information about the offender. This information can be edited at any time. You are prompted to complete the Offender History form whenever you begin an evaluation for a new client.

Completing the Offender History

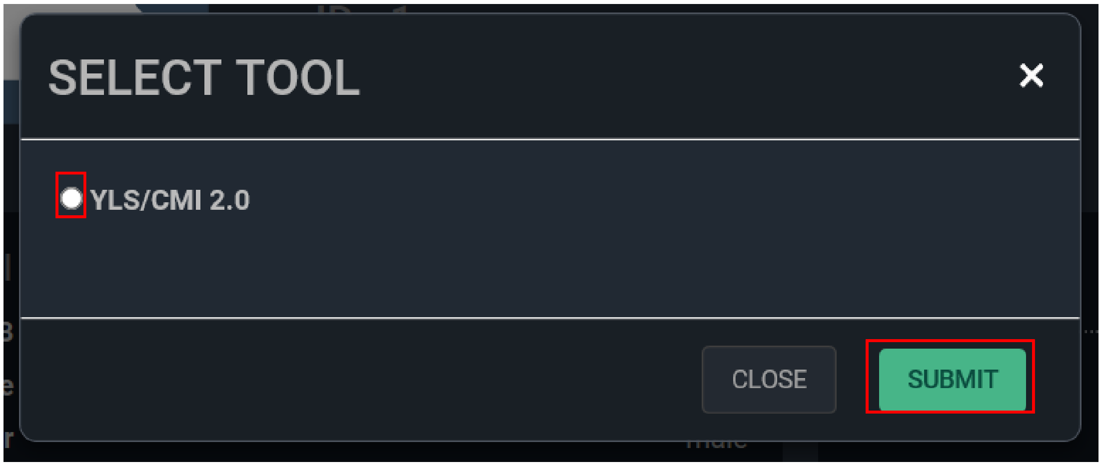
1. From the navigation menu, click **Caseload**
2. On the client listing page, click on the Avatar icon next to the specific client. The client's page will appear



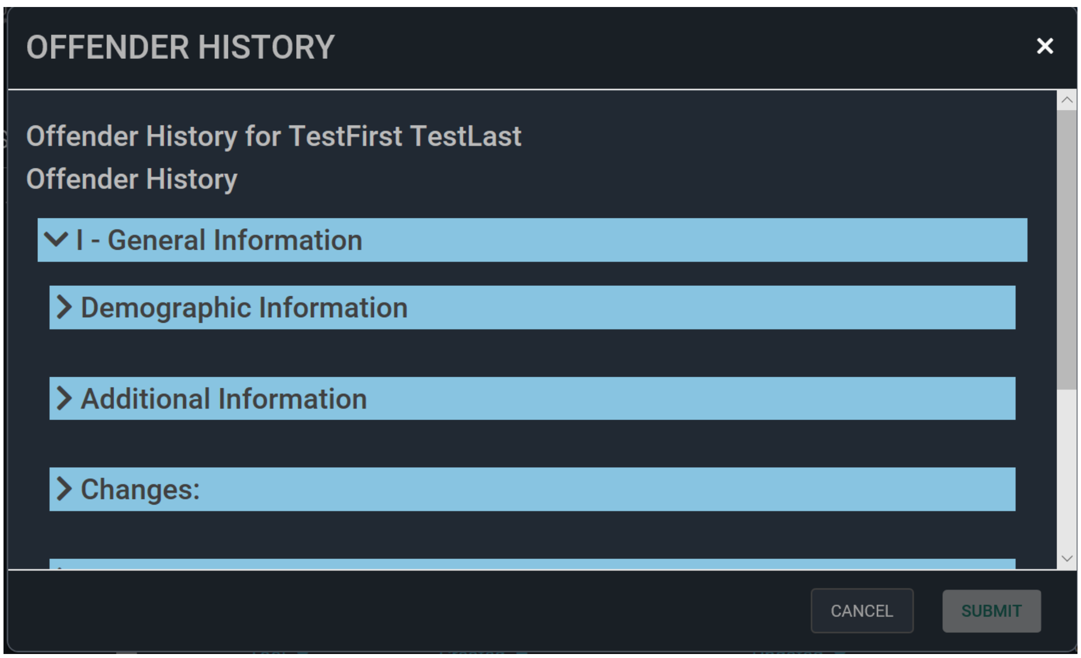
3. Click **Details** and under details click **Add Item**. The Select tool page will pop up.



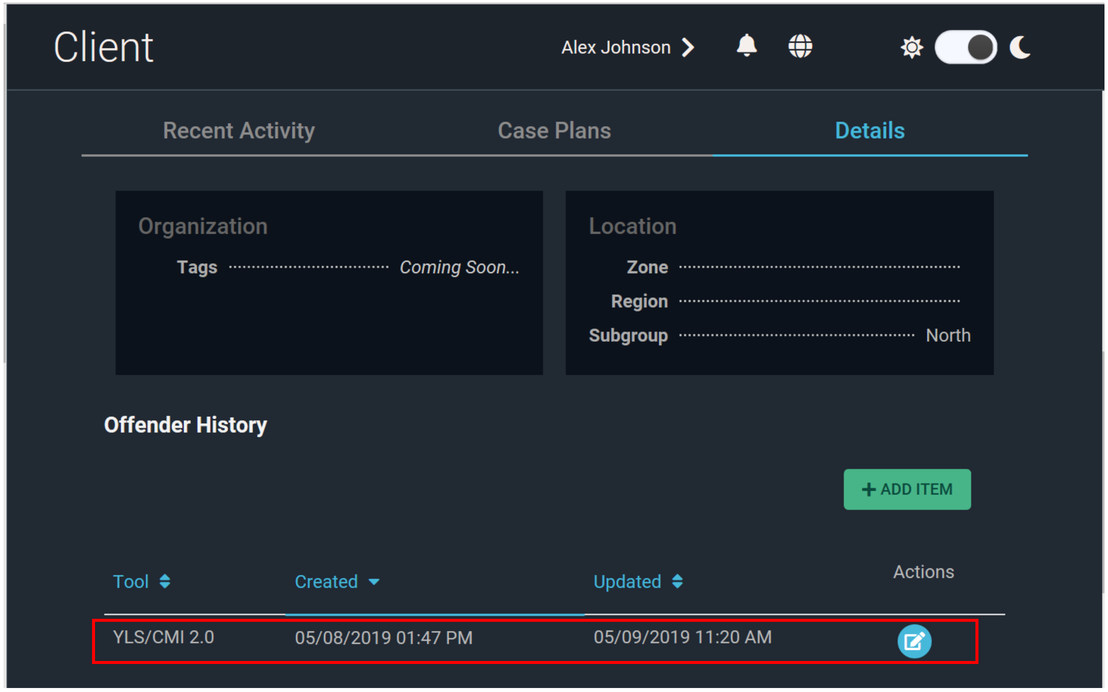
4. Click on the radio button next to the tool and click **Submit.**



5. The offender history form will appear. Click the arrow sign next to each section to expand.



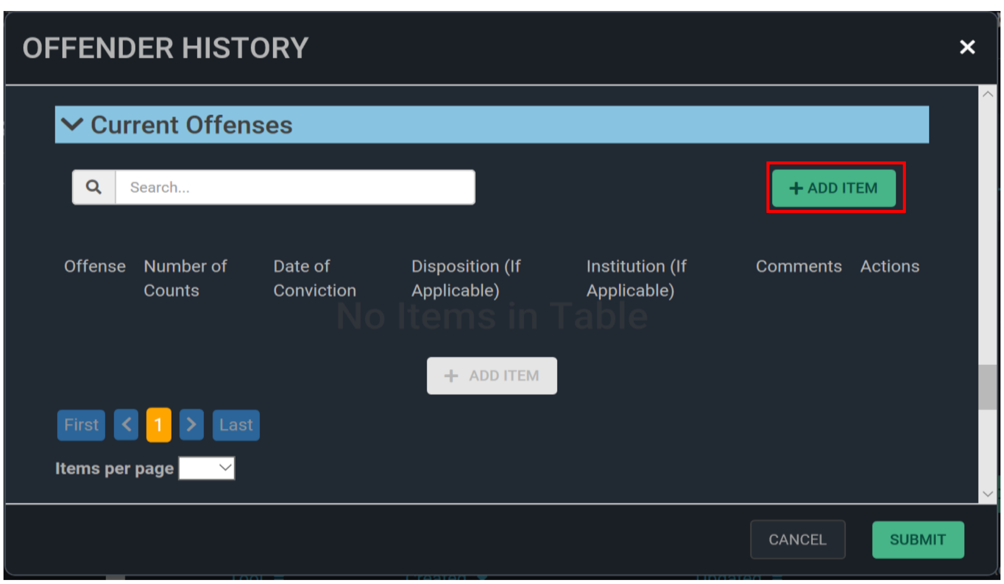
6. Fill in the text boxes on the Offender History form. Note that Gender and Setting (Norm) are required fields because it enables GEARS to generate an accurate risk level of the client.
7. Click **Submit** and the offender history will appear under Details in the client's profile.



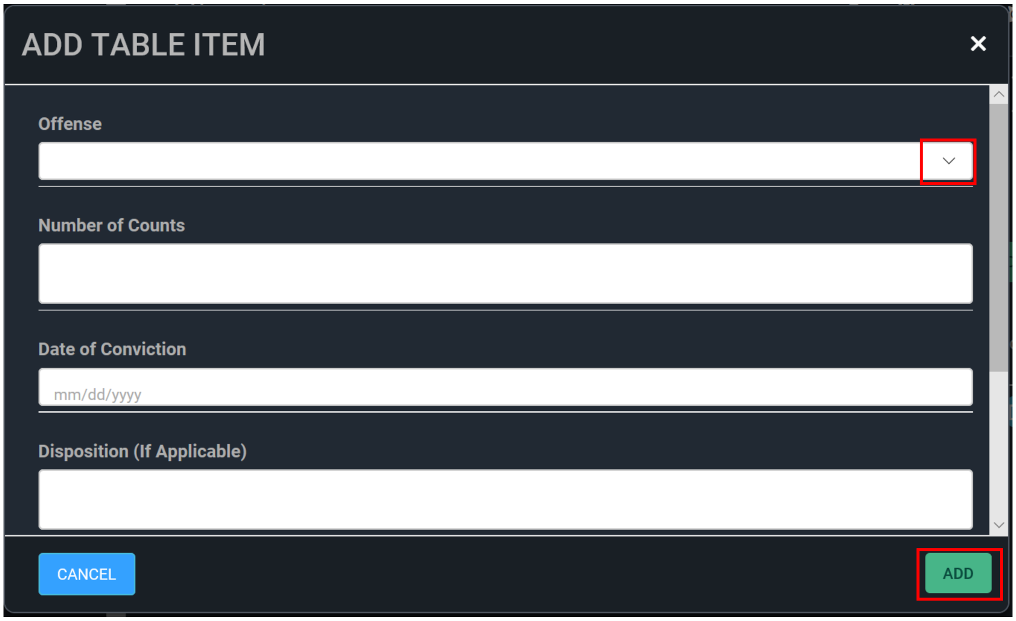
Add Current and Prior Offenses in The Offender History Form

To add Current and Prior Offenses, the offense must first be added to Offense Classification. The offense will then be made available in the drop-down menu.

1. On the current offense and prior offenses section of the offender history form, click **Add Item** and the Add Table Item page will appear.



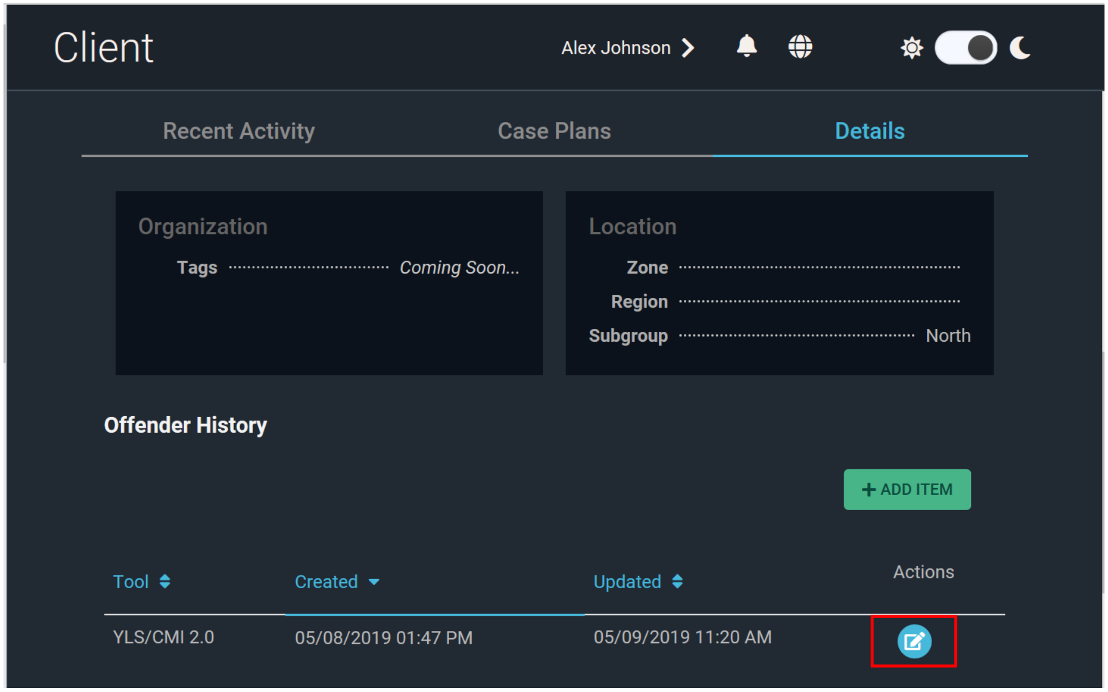
2. Click the drop-down menu icon in below offense and the list of offenses added in the offense classification section will appear.



3. Select the specific offense from the list
4. Enter the number of counts, date of convictions and disposition (if applicable)
5. Click **Add** and the offense will appear in the current/prior offense section of the offender history form.

Edit Offender History

1. From the client's page will appear, click **Details.**
2. Click the edit icon next to the offender history

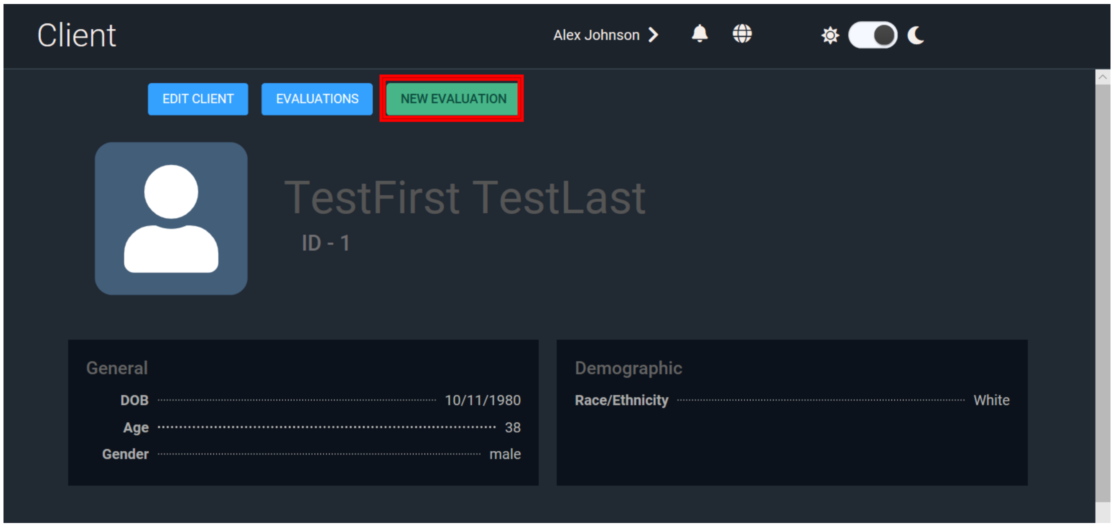


3. Make your changes in the text boxes

When you are finished, click Submit to overwrite the existing offender history form.

PERFORM AN EVALUATION

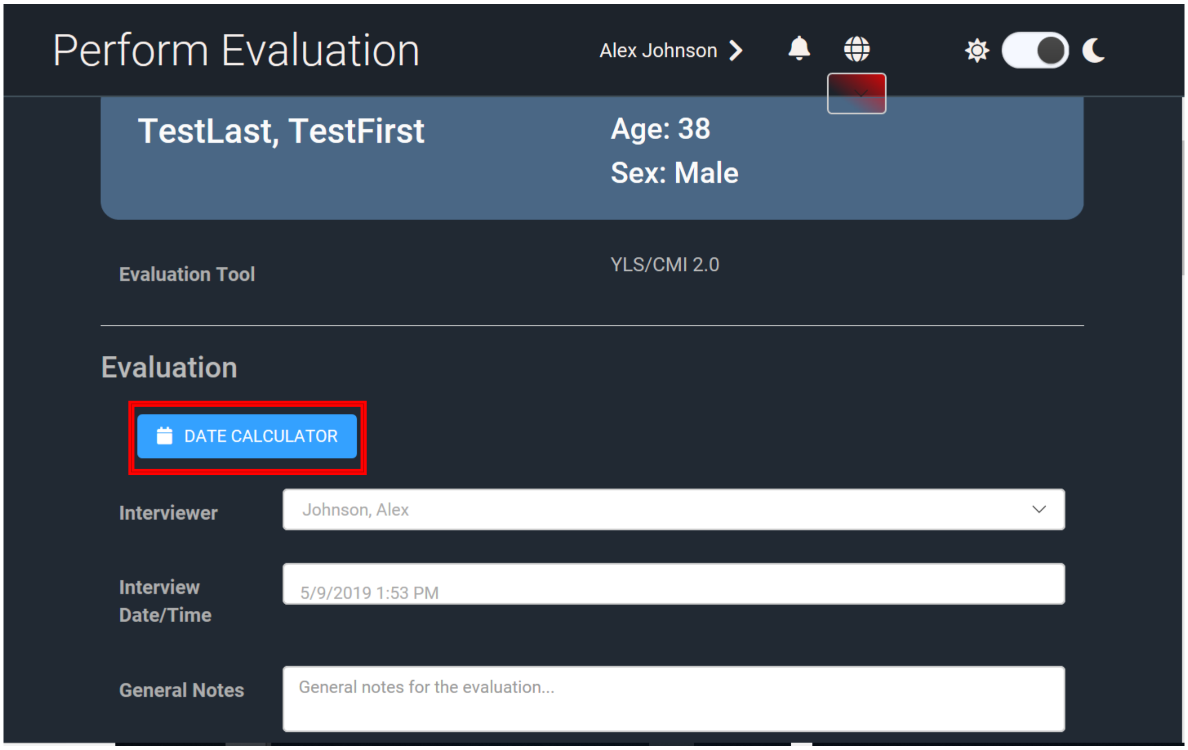
1. From the navigation menu, click [Caseload]
2. On the client listing page, click on the Avatar icon next to the client you wish to assess. The client's page will appear.
3. Click **New Evaluation**. The [Select tool page] will pop up.



4. Click on the radio button next to the tool you wish to use for the evaluation and click **Submit.**

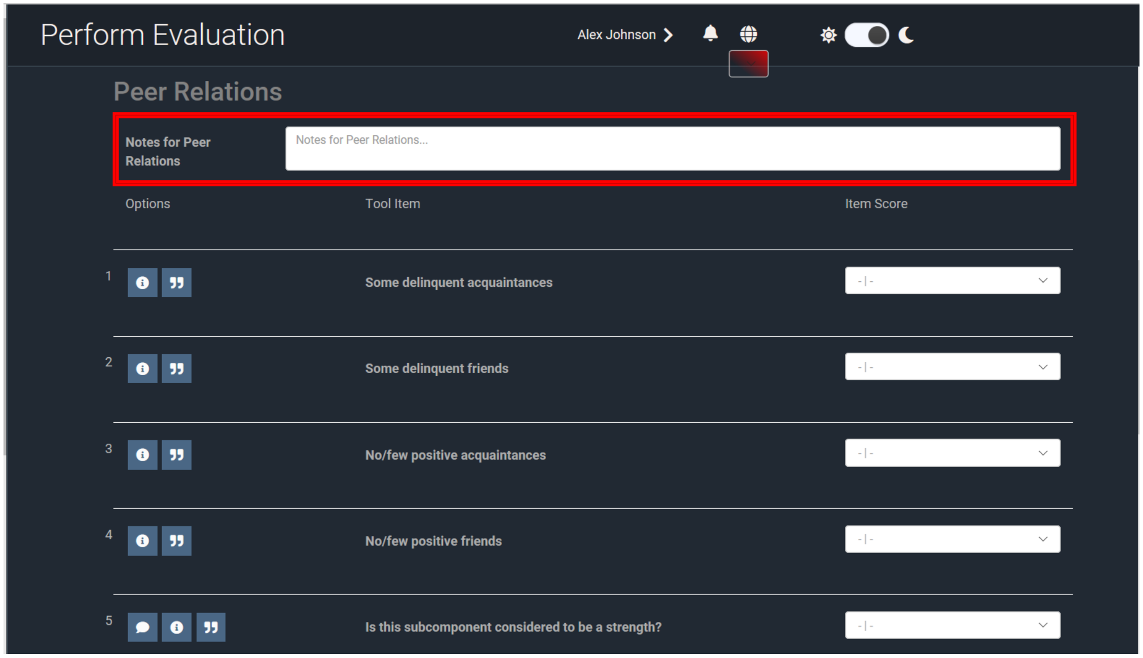
5. You will be prompted with a set of MHS Terms and Conditions, read the agreement carefully and select **Agree** to move forward with the evaluation. You will only be asked to agree to the terms and conditions your first time administering an assessment, but they may be accessed at any time and are located at the bottom of the navigation menu.

6. The interviewer field automatically pre-populates the interview date and time. The Interviewer field contains the first and last name of the active user account. Confirm the interviewer's name or click the drop-down menu icon in the text box to choose different interviewer.



7. In the general note text box, add general notes for the evaluation such as the client's countenance and overall behavior, the length of the evaluation (if the evaluation was completed over multiple days, state the number of days and why), location, client's mental health issues, etc. This note will appear under the General Note for the Evaluation in the report.

8. Each subsection in Part 1 provides a textbox for notes. In the textbox, add notes that are related to the specified subsection. The note(s) will appear under the Comments section of the report.



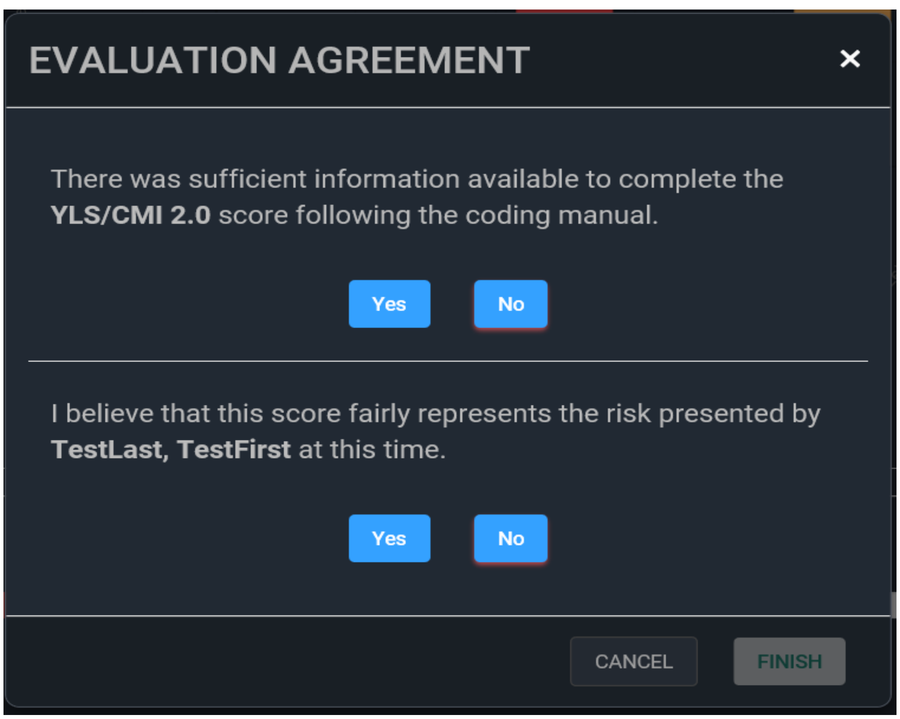
9. The icon beside each item allows you to view the scoring guideline for the item. The icon beside each item allows you to select the source of information used to score the item. The source of information selected will appear in the report.

10. If you select **Yes** to any strength question, click the icon and state why you think that subsection is a strength. These notes will appear under the Note on Strength section of the report.

11. After scoring the items, click **Submit Evaluation** to successfully submit the evaluation.

NOTE: The subcomponent risk chart and the total score bar show the client's risk level in real time

12. An Evaluation Agreement page will automatically pop-up, once you click Submit Evaluation button. Read each item. If you agree, answer **Yes** to the questions and click **Finish**.



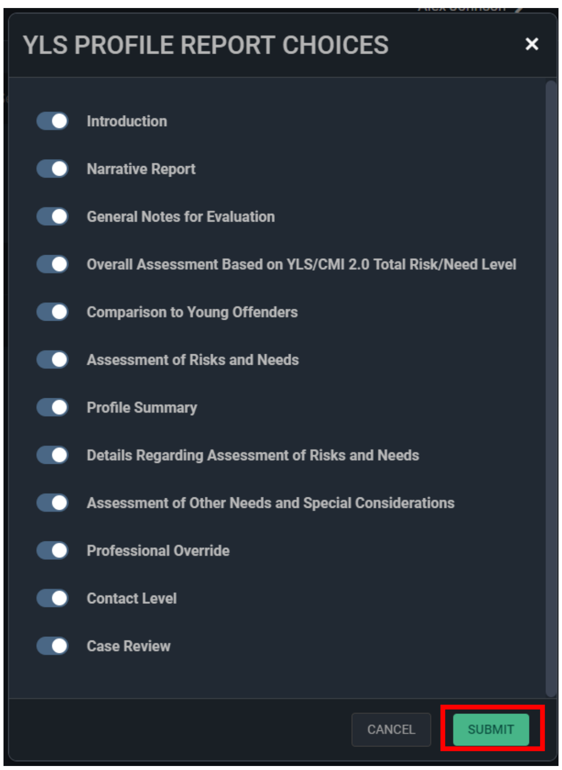
GENERATE A REPORT

Reports can be generated for any completed assessment. On the GEARS platform, reports can be generated in two ways. First, a report can be generated immediately after submitting an evaluation. Second, a report of an existing evaluation can be generated.

Generate a Report Immediately After Submitting an Evaluation

After clicking **Finish** on the Evaluation Agreement page, the next page that pops up is the profile report choices page.

1. Use the toggle switch to select the different section you wish to appear on the report and click **Submit** and the report will download to your PC.

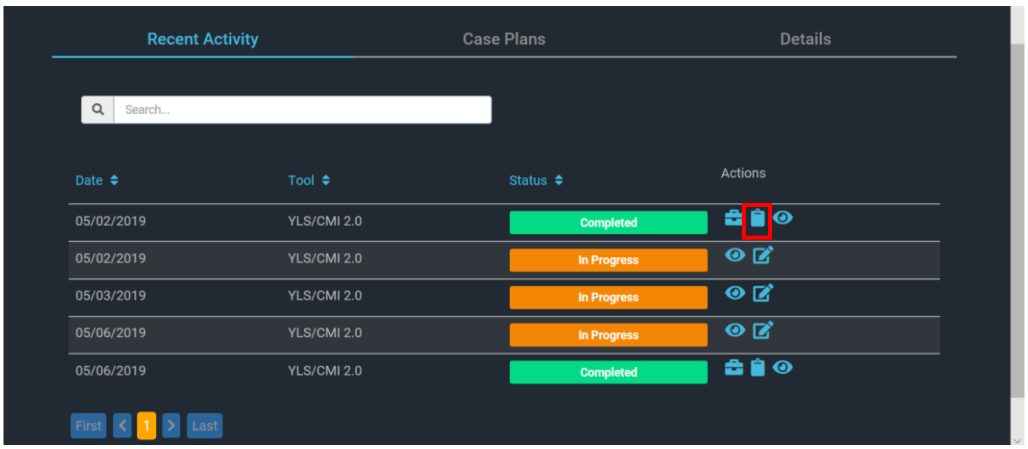


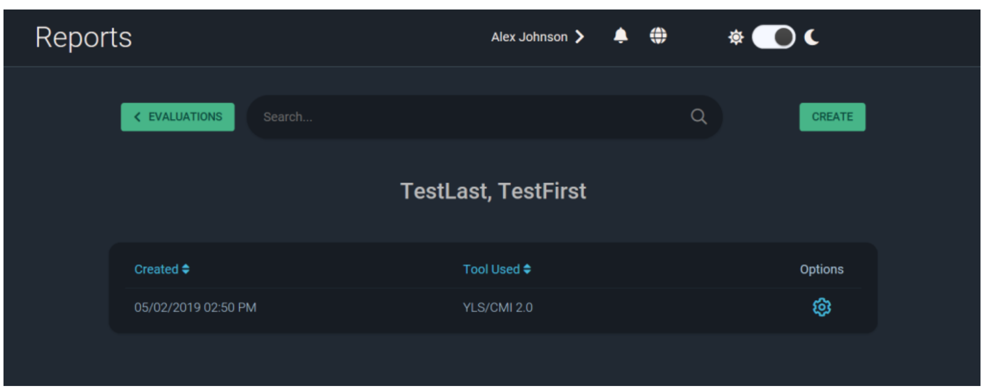
REPORT PROFILE CHOICES
Introduction provides a brief description of the tool used for the evaluation.
Narrative Report provides the total raw score, over-all risk level, risk level of the subsections and the recommended supervision level of the client
General notes for Evaluation show the notes added in the general note textbox during the evaluation.
Overall Assessment Based on YLS/CMI Total Risk/Need Level shows the total assessment score and indicated the classification level associated with the score.
Comparison with Young Offenders show the percentile score of the client compared to the client’s norm group
Assessment of Risk and Needs show a graphic display of the risk level of the subsections, and a table showing the standard cut-offs scores used to determine the risk level for each subsection.
Profile Summary shows the subsections assessed as low, moderate and high risk, as well as the subsections assessed as strength and notes on strength.
Details Regarding Assessment of Risks and Needs provides a table that contains the detailed information regarding each subsection of the assessment, including the specific items that apply to the client’s case, the source of information, and comments, and indicates the client’s area(s) of strength.
Assessment of Other Needs and Special Considerations show the other needs and special consideration in Part 2 of the assessment that the evaluator marked as present.
Professional Override shows the raters total risk override and comments if any
Contact Level shows the level of supervision selected for the client
Case Review shows any changes listed, client’s non-compliance with court order if any, and actions taken to deal with non-compliance.

Generate a Report for an Existing Evaluation

Reports may be re-generated at any time in GEARS. To do this

1. From the navigation menu select **Caseload**
2. Click the Avatar icon beside the client you want to generate the report. The client page will open. At the end of the page is Recent Activity where all the assessments conducted for the client are.
3. Locate the assessment you wish to generate a report for and click the clipboard icon under Actions next to assessment. You will be taken to the Report page.

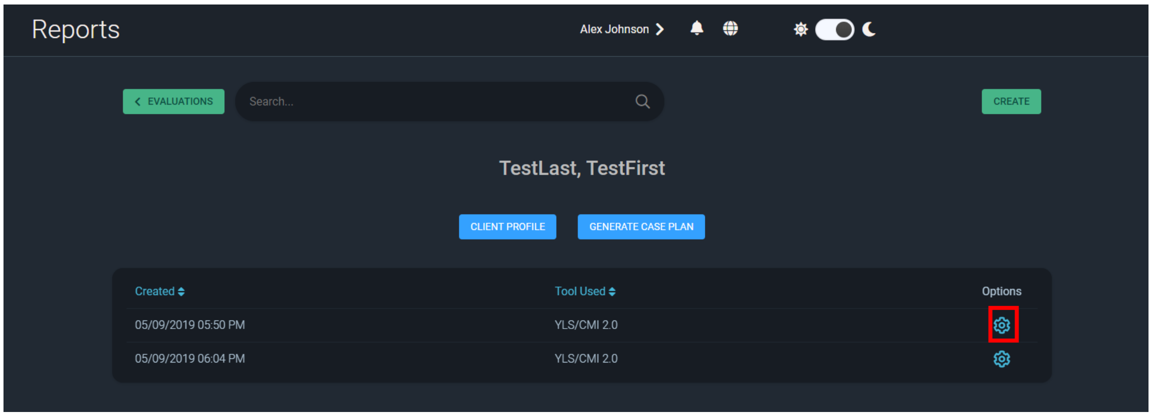




4. Click **Create** to generate a new report. The profile report choices will pop up.
5. On the profile report choices, select the different section you wish to appear on the report and click Submit

Download a Report

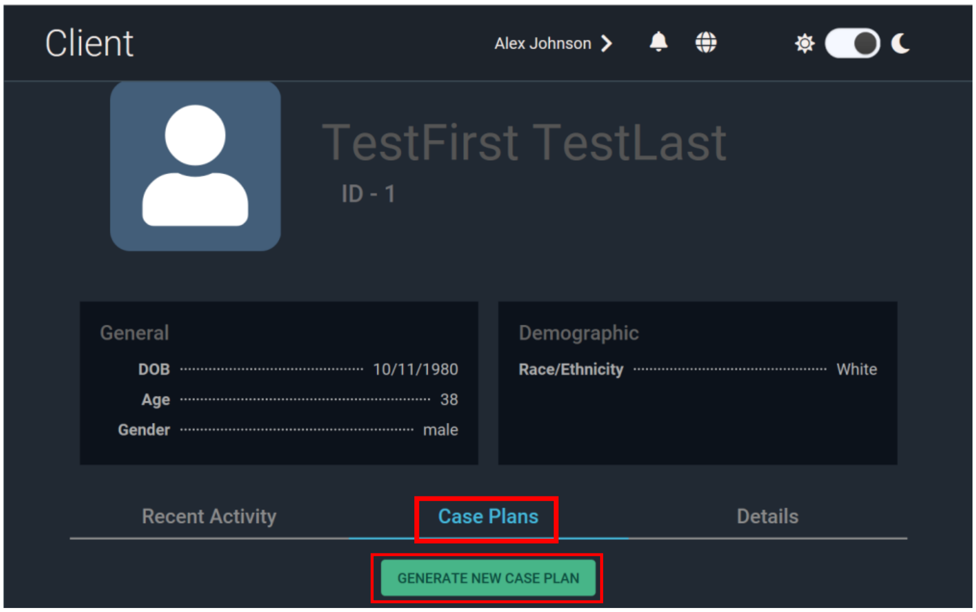
1. Locate evaluation in the recent activity table
2. Generate a report by clicking the clipboard icon next to the assessment. The Reports page will appear.
3. Click the gears icon next to the assessment
4. Click **Download**



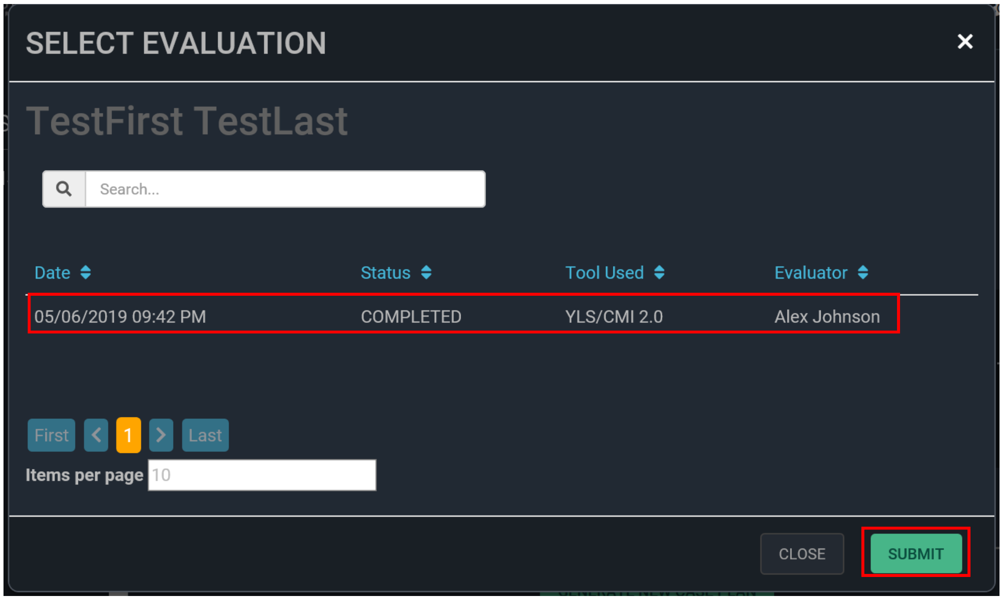
GENERATE CASE PLAN

Generate a case plan template

1. From the navigation menu, click **Caseload**
2. On the client listing page, click on the Avatar icon next to the specific client. The client's page will appear.

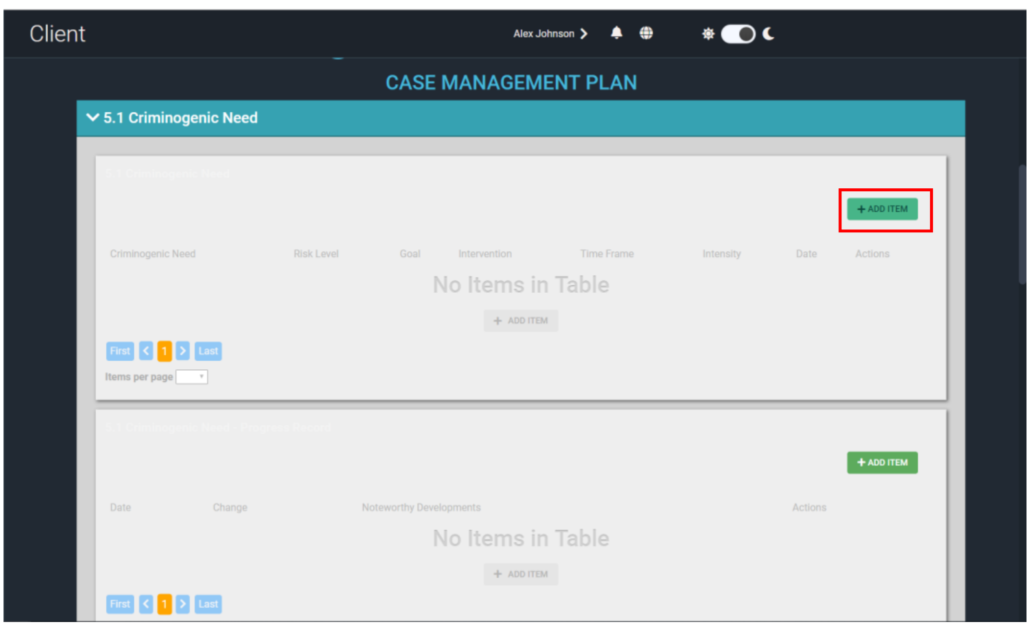


3. Click **Case Plan** and under the case plan, click **Generate New Case Plan** and the Select Evaluation page will appear
4. Click on the evaluation you want to generate a case plan and click **Submit**. A case plan template with criminogenic needs, non-criminogenic needs and progress table will appear.

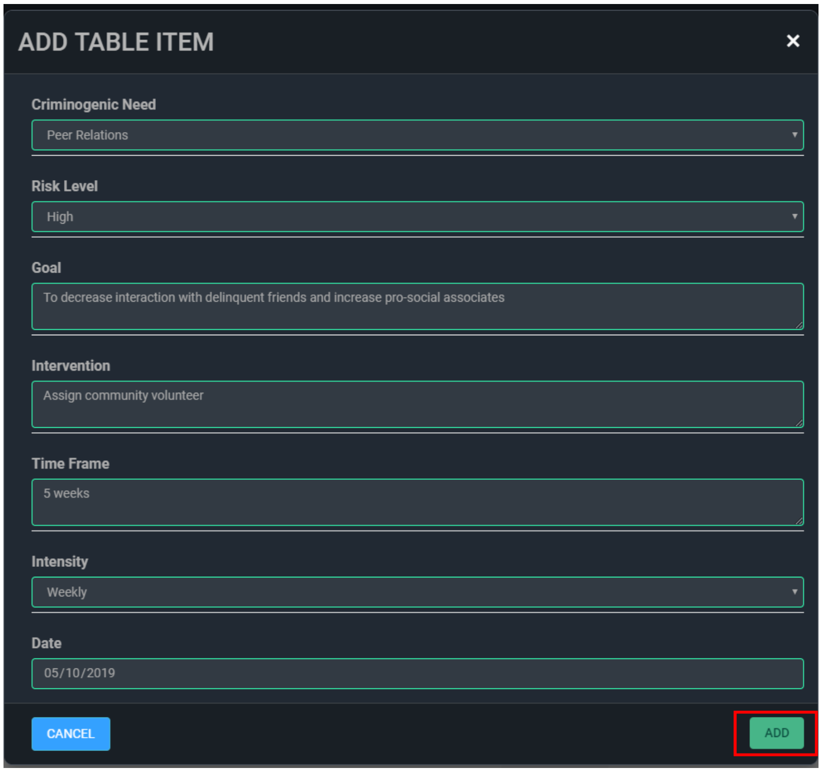


Add Criminogenic needs

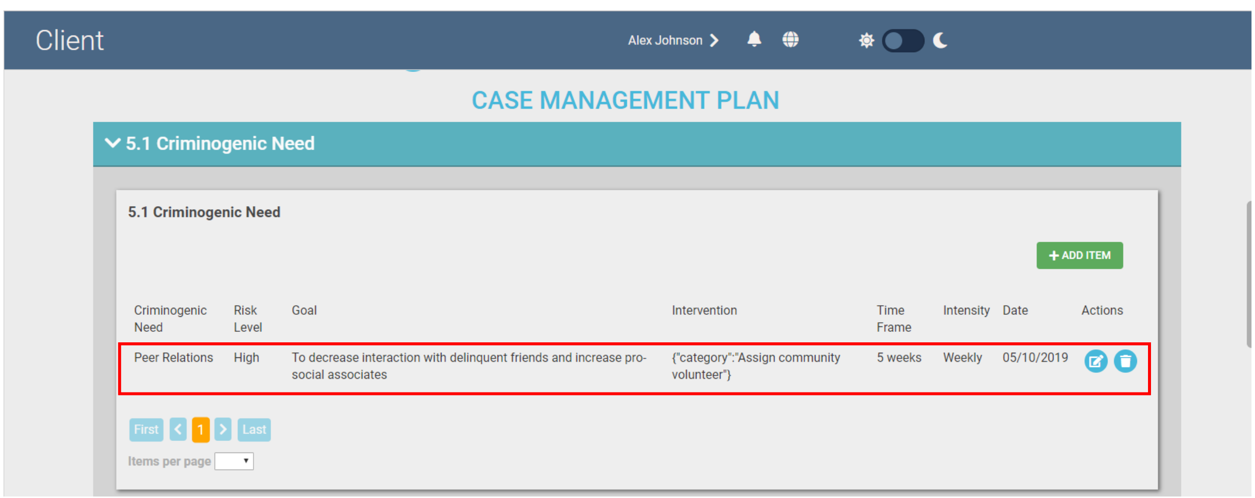
1. On the criminogenic need table, click **Add Item**. This opens a page to add table item



2. Select the criminogenic need and risk level from the drop-down menus. Type the goal of the intervention, the intervention, and the time frame in the respective text boxes.
3. Select the intensity of the intervention from the drop-down menu and select the date.



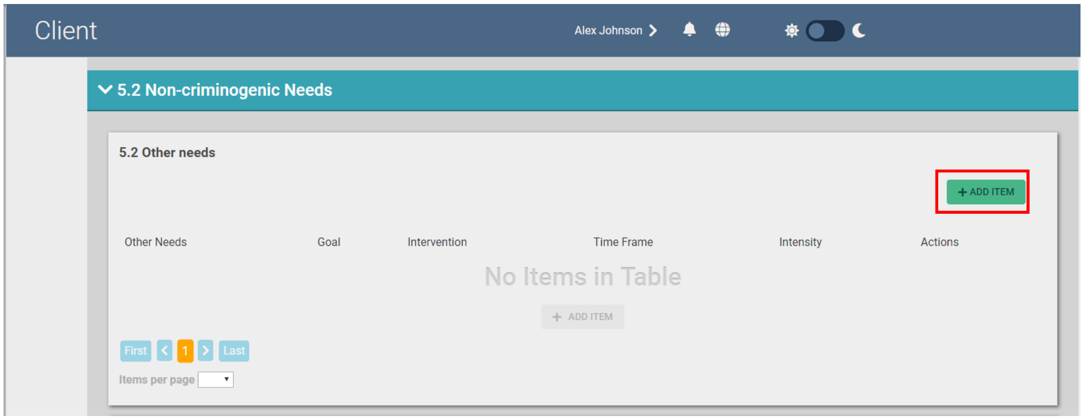
4. Click **Add** and the item will be added to the criminogenic need table.



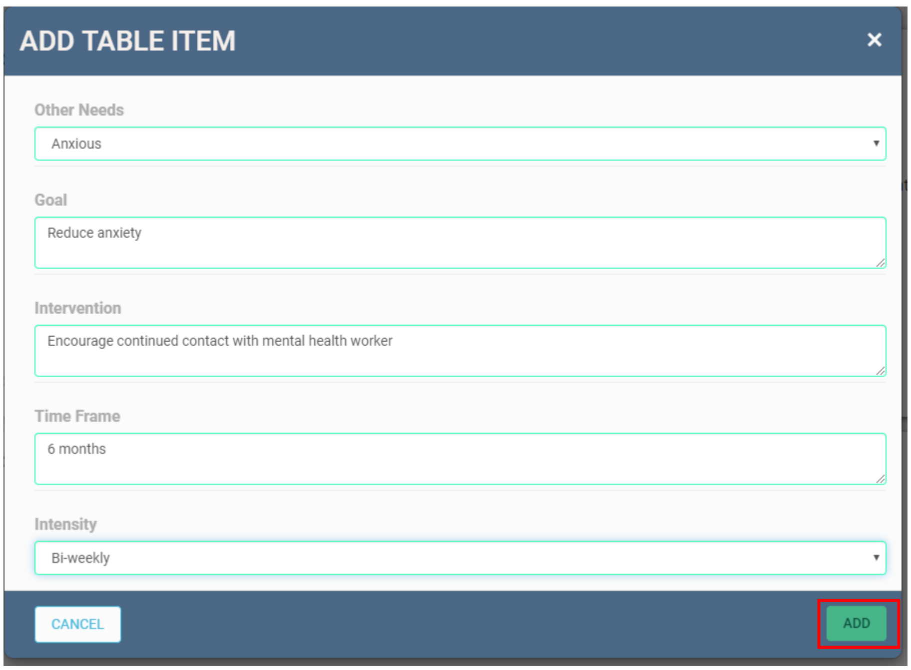
5. Click **Save/Submit.**

Add Non-Criminogenic Needs.

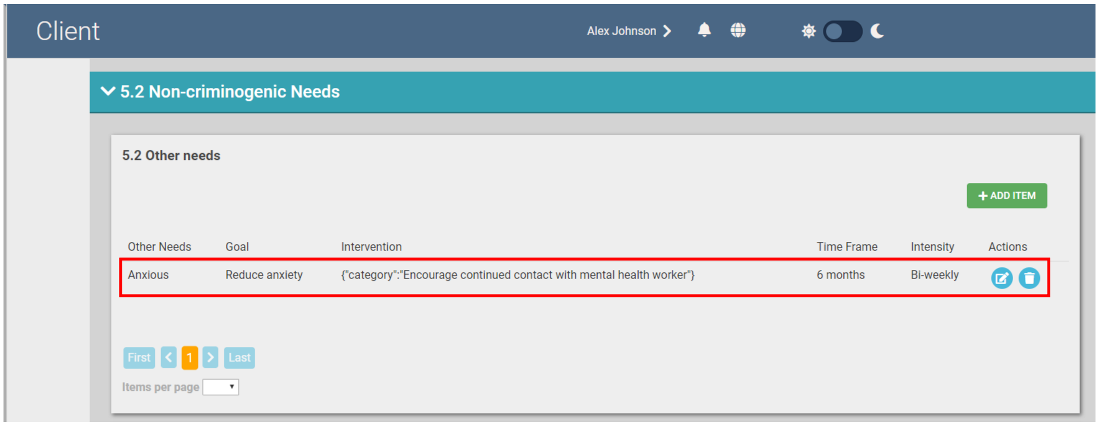
1. On the non-criminogenic need table, click **Add Item**. This opens a page to add table item



2. Select the non-criminogenic need and enter details in the required text boxes



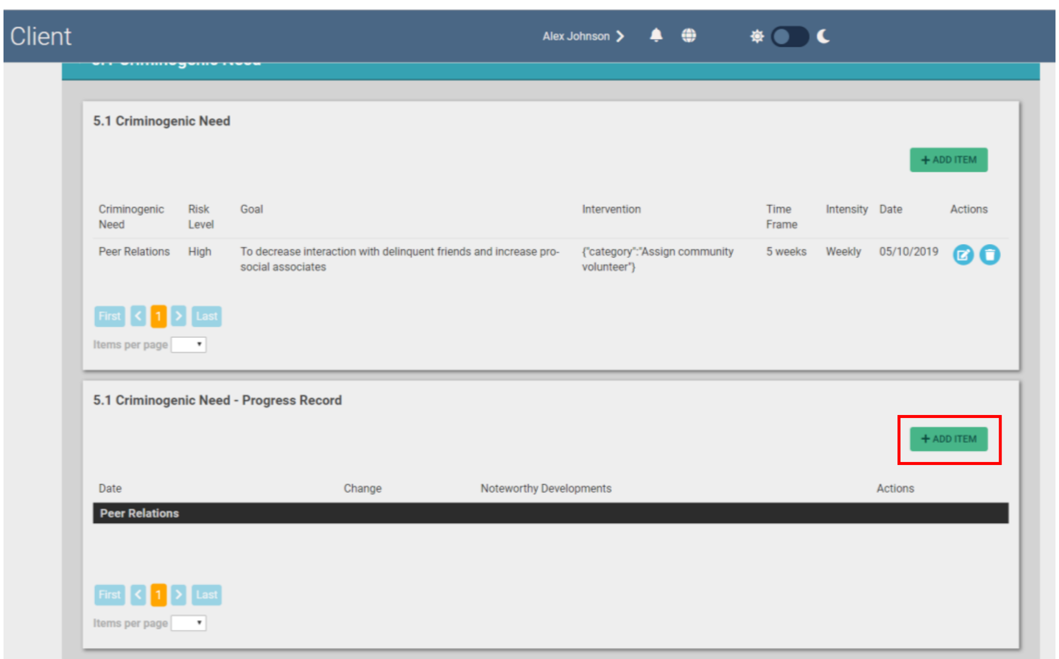
3. Click **Add** and the item will be added to the non-criminogenic need table.



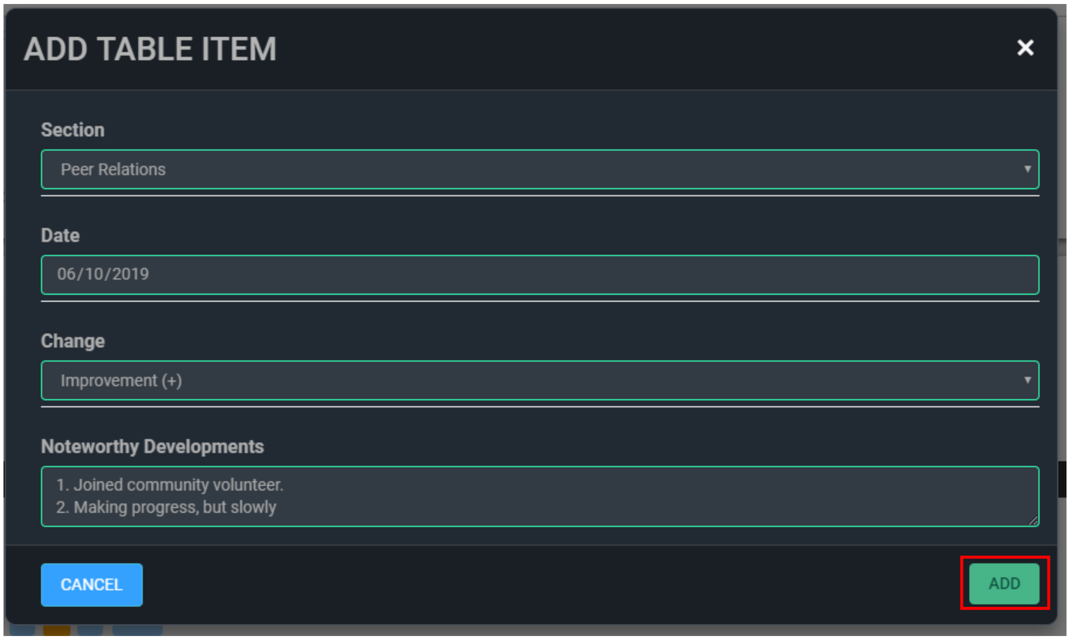
4. Click **Save/Submit.**

Add Progress Record

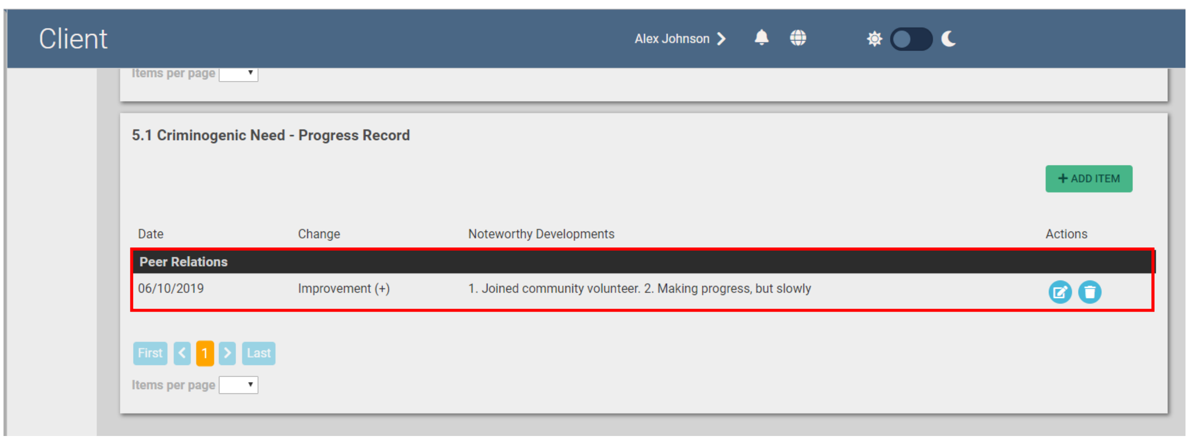
1. On the Need- Progress Record table, click **Add Item**. This opens a page to add table item



2. Select the section from the drop-down menu and enter the details in the required boxes and



3. click **Add** and the item will be added to the Criminogenic Need – Progress Record table



4. Click **Save/Submit.**

Generate A Case Plan Report

1. Click **Generate Report** and a case plan report will be downloaded to your PC.