
Licensing



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CWS/CMS Training Module Conventions

Module Purpose and Organization

This student guide is business process oriented. So, certain sections, notebooks and pages may be skipped in a specific module and presented later when they are relevant to a process.

This module introduces you to the CWS/CMS tools required to perform the foster home licensing functions.

This module contains the following:

- A skill building exercise to be used in conjunction with the Scenario Manager application
 - **M08_S01 Licensing (Part 1).arc**
 - **M08_S01 Licensing (Part 2).arc**
 - **M08_S01 Licensing (Part 3).arc**
 - **M08_S01 Licensing (Part 4).arc**
- A list of objectives for the module
- A summary of the module

Disclaimer: The dates presented in this student guide and in the accompanying screen shots may need to be adjusted at the user's discretion to avoid conflicting with dates in scenario manager.

Disclaimer: This training guide provides direction for creating placement homes records and associated County License Case records in CWS/CMS, and uses Foster Family Homes as an example. Follow your local county practice when choosing what type of placement home to create.

Skill Building Exercise: Foster Home Licensing

Scenario Manager File: M08_S01 Licensing (Part 1).arc

User ID = WALLACG

Password = \$Good2go

Case: Kristen F

You are a social worker assigned to the Downtown Sacramento Child Welfare Services office. Today, you have scheduled time to record a county foster home licensing application for the F Family. You need to enter the county licensing information into CWS/CMS.

Receive Application For County Licensing Home

On January 15, 2007, Mrs. Kristen F requested a license to provide foster care for children. Kristen F's birth date is 2/14/1982, Social Security Number 000-00-0095. Her California Driver's License number is A0000005. She is a high school graduate and is employed full time by Aetna Insurance with an annual income of \$35,000. Her husband George F is a college graduate and is employed by UC Davis Medical Center with an annual income of \$85,000. George F's birth date is 7/1/1979, Social Security Number 000-00-0084. His California Driver's License is N0000005.

George and Kristen F reside at 1717 Side Street, Sacramento, CA 95834. Their telephone number is 916-000-2213. They have two children, Kalyssa F, birth date 11/15/2002, and Amaya F, birth date 12/30/2006. The family is of Hispanic ancestry and speaks both English and Spanish. Kristen F is also Caucasian. Steve J, Kristen's brother, is very involved with the family. He lives in Nevada but spends the summer months and holidays with the F family.

Kristen F has no preference as to gender of children to be placed with her. She is willing to provide emergency shelter and has a child care plan. Both George and Kristen F are willing to provide transportation and public transportation is also available in their neighborhood. Kristen F has agreed to in home visits after her work hours.

The family home is directly across the street from Ryder High School. Bradley Elementary and Kit Carson Middle School are also located nearby. The family prefers long term foster care and would like the opportunity to help prepare young adults/teenagers for living independently.

Kristen F completed all requirements, which included an initial home visit on February 25, 2007. Through the licensing process you determine, on March 1, 2007, that she is qualified to become a county licensed home. The Kristen and George F home has been approved for up to four children. A fire clearance was received on February 15, 2007.

Foster Family Home move to a Resource Family Home using Process Placement Home Move

The Department of Social Services is requiring Foster Family Homes be moved to Resource Family Homes. You begin the process to move George and Kristen F, Foster Family Home to a Resource Family Home. You will use the Process Placement Home Move command in the CWS/CMS system to move the existing Foster Family Home to a Resource Family Home.

Save to database after recording all foster home and county licensing information.

Foster Home Licensing

Introduction

This module introduces you to the CWS/CMS foster home licensing tools. A staff person uses these tools to perform the county foster home licensing functions.

Objectives

After completing this module, you will be able to do the following with little or no assistance:

- Perform a Foster Home Facility Search
- Create a Placement Home Notebook
- Create a County Licensing Case Notebook
- Close a County Licensing Case
- Move substitute care provide to a new address –
Process Placement Home Move
- Move Foster Family Home (FFH) to Resource Family
Home (RFH) – Process Placement Home Move

Starting the Client Services Application

The first step for entering foster home licensing information is to start the CWS/CMS Control Panel. To start the CWS/CMS Control Panel and the Client Services application, follow these steps:

1. From the Windows desktop, double click the CWS/CMS icon.



Figure – L_001

2. In the CWS/CMS Control Panel login window, (A) verify your User ID, (B) type your password, and (C) click the OK button.

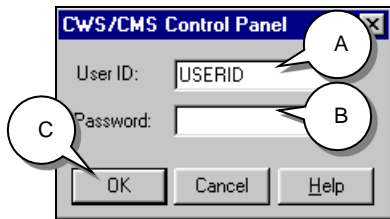


Figure – L_002

3. From the CWS/CMS Control Panel, (A) click the Client Services application icon.

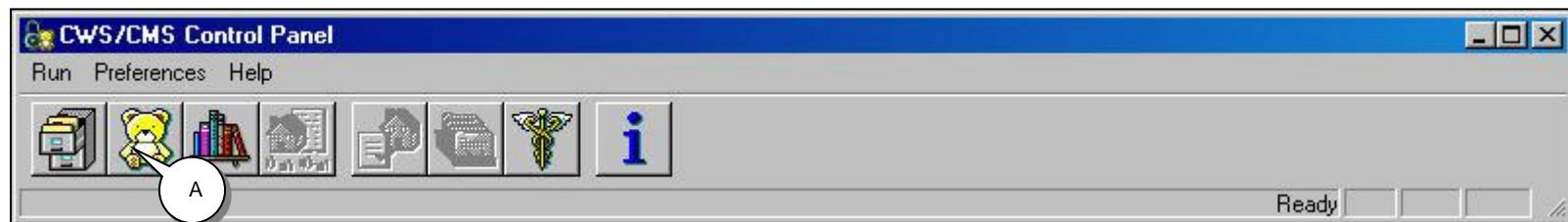


Figure – L_003

Search Placement Home/Substitute Care Provider

Before creating a home, do a thorough search of the database. If the substitute care provider is known to the system you can attach or associate the substitute care provider to a home. This step is covered in Licensing (Part 4). A thorough search eliminates duplication of clients and homes.

1. From the Client Services application, (A) click the Search drop-down menu and (B) select Start Search.

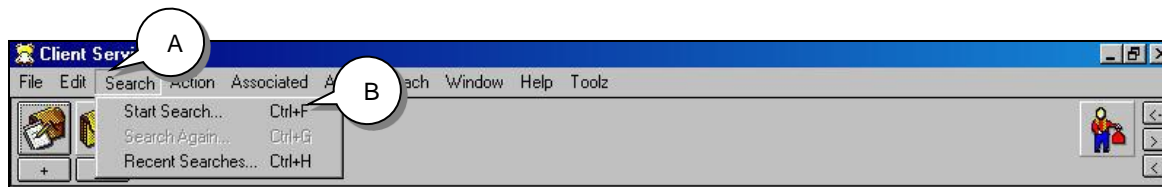


Figure – L_004

2. In the Search Type field (C) select Substitute Care Provider.

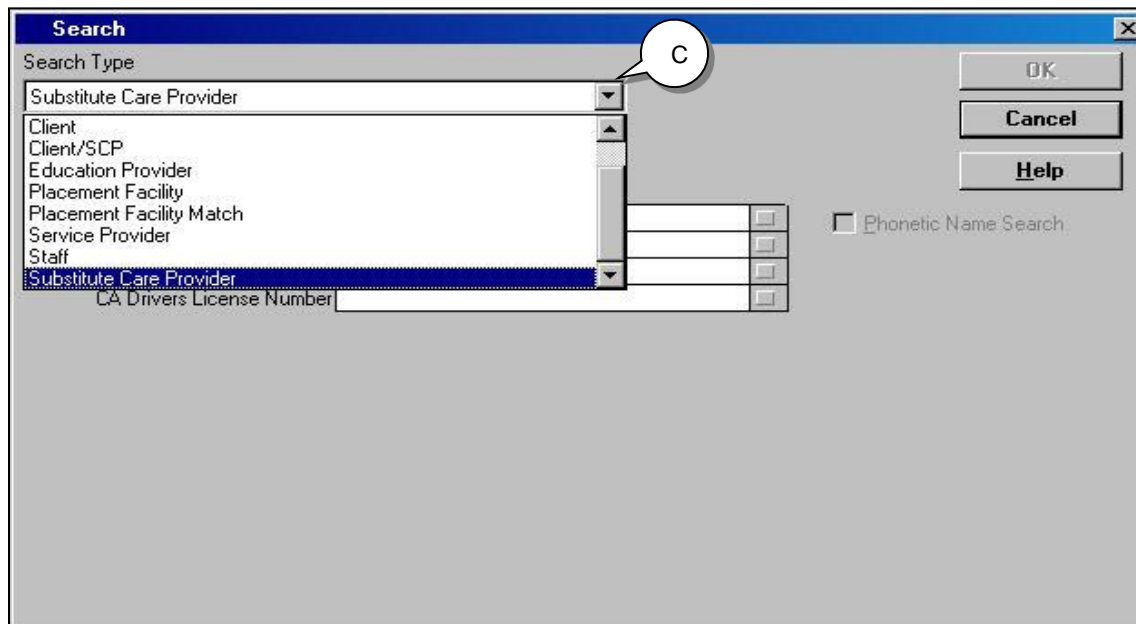


Figure – L_005

Search Placement Home/Substitute Care Provider (continued)

3. (A) Enter the Foster Family/Substitute Care Provider name. (B) Click OK.

The screenshot shows a 'Search' dialog box with a blue title bar. Inside, there is a 'Search Type' dropdown menu currently set to 'Substitute Care Provider'. To the right of the dropdown are three buttons: 'OK', 'Cancel', and 'Help'. A callout bubble labeled 'B' points to the 'OK' button. Below the dropdown, there are four input fields with labels to their left: 'First Name' (containing 'Kristen'), 'Last Name' (containing 'F'), 'Social Security Number', and 'CA Drivers License Number'. A callout bubble labeled 'A' points to the 'First Name' field. To the right of these fields are four checkboxes, each with a red checkmark icon in its top right corner. The first checkbox is checked and is labeled 'Phonetic Name Search'. The other three checkboxes are unchecked.

First Name	Kristen	<input checked="" type="checkbox"/>
Last Name	F	<input checked="" type="checkbox"/>
Social Security Number		<input type="checkbox"/>
CA Drivers License Number		<input type="checkbox"/>

☒ Phonetic Name Search

Buttons: OK, Cancel, Help

Figure - L_006

Search Placement Home/Substitute Care Provider (continued)

4. No hits were found. (A) Close the Search Results by clicking the X.

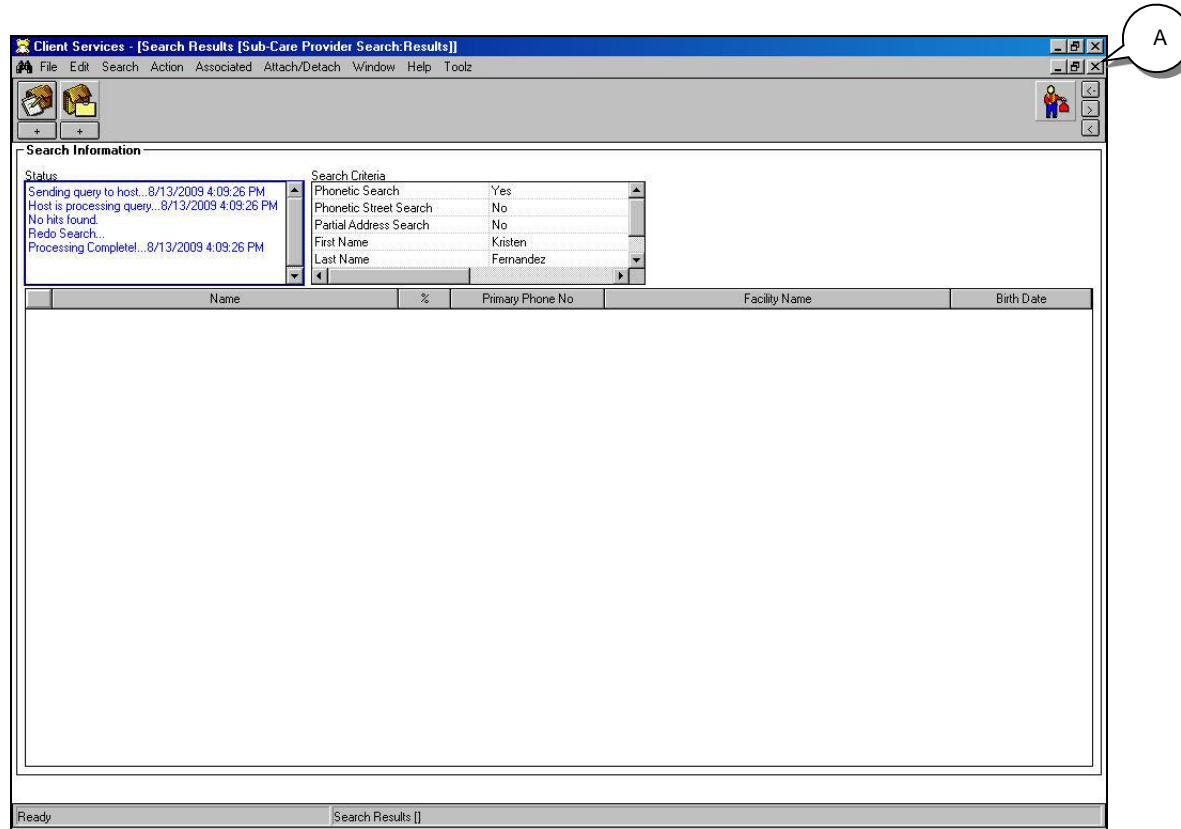


Figure – L_007

5. (B) Close the Client Services application by clicking the X.

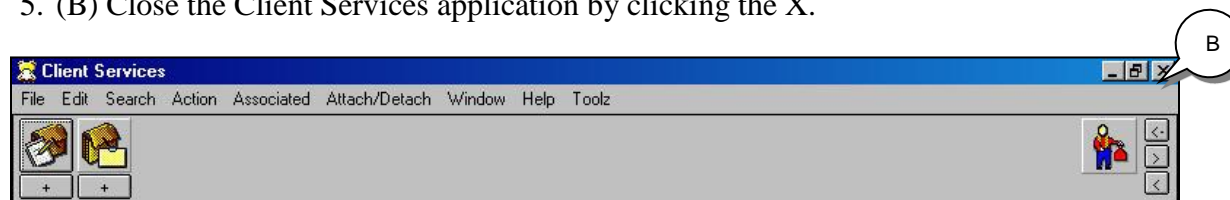


Figure – L_008

Resource Management Application

1. Open the Resource Management application from the Control Panel. The Placement Home notebook is located in the Placement Facilities Section (red button). (A) Open the Resource Management application.

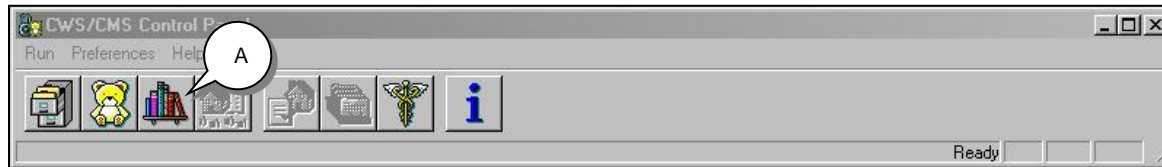


Figure – L_009

2. (B) Click on the Placement Facilities Section (red button), and (C) click the “+” Create New Placement Home notebook.

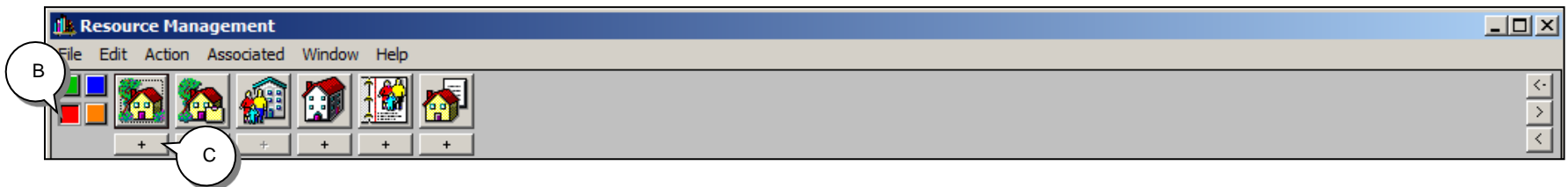


Figure – L_010

Creating a Placement Home Notebook

Placement Home – ID Page

1. On the ID page tab (A) create a name for the home. This field is mandatory although not yellow when the home is first created. A good naming convention is: Last Name, First Names followed by type of facility (e.g., J, Mary & Thomas FFH). (B) Select the home type “Foster Family Home”. (C) Record the Primary Phone number, (D) Backup Contact, if applicable, and (E) Address fields. (F) Record Disaster Emergency Contact Information.

Resource Family Home:

If you are creating a Resource Family Home (RFH), select the Type of Resource Family Home instead of Foster Family Home. Follow the remaining steps for creating a placement home, or your county specific procedures.

Placement Home Notebook:

Not all pages in this notebook will be covered in this lesson. This lesson will focus on the pages used most often when creating a Foster Family Home. For information on pages that are not covered in this lesson, click the page tab and press the F1 key to open a context sensitive help file for that page.

Age Range:

If creating a home for a Nonminor Dependent, the age range is 25 and under.

Figure – L_011

Creating a Placement Home Notebook (continued)

Substitute Care Provider Page

1. (A) Click on the Substitute Care Provider page tab. (B) Click the “+” in the Name grid. (C) Enter information for the substitute care provider(s) by completing all mandatory (yellow) and known fields on the page. (D) Be sure and check the Primary Provider field. (E) Fill in Start Date.

Resource Management - [Placement Home [Kristen F]]

File Edit Action Associated Window Help

ID Substitute Care Provider Other Children Other Adults Chap/Pref License Info Comments Special Projects Payee LA Payee Hold Status Background Check

Substitute Care Providers

	Name	Assoc Start Date	Assoc End Date
1	F, Kristen	02/16/2017	

Name

Title First MI Last Suffix

Gender

☐ Male ☒ Female

Birth Date 02/14/1992

Marital Status Married

Phone Numbers

+ Phone Number Type

Hispanic or Latino Origin

☒ Yes ☐ No ☐ Declines to State ☐ Unable to Determine

Unable to Determine - Reason

Race/Ethnicity

Specify Race* if known

+ Ethnicity

1 Hispanic

Unable to Determine - Reason

SCP Associations to This Home

	Provider	Start Date	End Date	Licensee
1	Primary	02/16/2017		Unknown

Attorneys Associated to This SCP

	Attorney	Start Date	End Date	D
--	----------	------------	----------	---

Primary Provider ☒ CDS Person # Start Date 05/01/2007 End Date

Secondary Provider ☐ CDS Person # Start Date End Date

Licensee ☐ Yes ☐ No ☒ Unknown **Resident** ☐ Yes ☐ No ☒ Unknown

Ready Placement Home [Kristen F]

AFCARS (Green) Fields:
Green fields provide visual cues of important fields to complete. It is not mandatory to complete these fields in order to save to the database. However, the data in the green fields is used to fulfill federal AFCARS (Adoption and Foster Care Analysis and Reporting System) reporting requirements. If the information is not known at the time the Placement Home notebook is created, it should be obtained and entered into the notebook as soon as possible.

Figure – L_012

Creating a Placement Home Notebook (continued)

2. (A) Click the “+” in the Name grid to create a new row for a secondary provider. (B) Enter information for the secondary substitute care provider(s). (C) complete all mandatory and known fields on this page.

Resource Management - [Placement Home [George F]]

File Edit Action Associated Window Help

Substitute Care Providers

ID	Name	Assoc Start Date	Assoc End Date
1	F, George	05/01/2007	
2	F, Kristen	05/01/2007	

Confidential Attributes

SSN: 000-00-0084 CA Driver's License: N0000005

Primary Income: Employment Status:

Secondary Income: Annual Income Amount: 85000.00

Education: College Graduate

Name

Title: First: MI: Last: Suffix:

George F

Gender

Male Female

Birth Date: 07/01/1979 E-mail Address:

Marital Status

Married

Phone Numbers

Phone Number	Type
(916)000-2213	Home

Hispanic or Latino Origin

Yes No Declines to State Unable to Determine

Race/Ethnicity

Specify Race* if known

Ethnicity
1 Hispanic

SCP Associations to This Home

Provider	Start Date	End Date	Licensee
1 Secondary	05/01/2007		Unknown U

Attorneys Associated to This SCP

Attorney	Start Date	End Date	D

Primary Provider

CDS Person #: Start Date: 05/01/2007 End Date:

Secondary Provider

Licensee: Resident:

Yes No Unknown Yes No Unknown

Ready Placement Home [George F]

Secondary Provider:

A secondary provider cannot be added to the home unless there is an active primary provider in place.

Figure – L_013

Creating a Placement Home Notebook (continued)

Other Children Page

Use this page to enter information about other children (persons under 18 years of age) living in the placement home who are not placed there by Child Welfare Services.

1. (A) Click the Other Children page tab. Since you have information about other children in the home, (B) click the “+” to create a new row in the grid for each child, (C) enter their name, birth date and gender, and (D) click the “+” in the relationship grid to record relationships between children in the home and substitute care providers.

Resource Management - [Placement Home [George F]]

File Edit Action Associated Window Help

Substitute Care Provider Other Children Other Adults Char/Pref License Info Comments Special Projects Payee LA Payee Hold Status Background Check

Other Children in Home

	Name	Date of Birth	Gender
1	Amaya F	12/30/2006	Female
2	Kalyssa F	11/15/2002	Female

Name: Kalyssa F
Date of Birth: 11/15/2002
Gender: ☒ Male ☒ Female
Annual Unearned Income: .

Special Characteristics - Applies to All

Kalyssa F's Relationship to Substitute Care Providers

	SCP Name	Relationship
1	F. George	
2	F. Kristen	

SCP Name: F. Kristen Relationship: [dropdown]

Special Characteristics:

Enter any special characteristics of the children. This text box applies to all other children in the home.

(Child's) Relationship to Substitute Care Providers:

These fields cannot be completed until the Substitute Care Provider(s) have been entered for the home.

Figure – L_014

Creating a Placement Home Notebook (continued)

Other Adults Page

Use this page to enter information about adults (persons 18 years of age and over) who reside at the placement home, or have significant contact not living in the home. (A) Complete all mandatory and known fields.

Resource Management - [Placement Home [George F]]

File Edit Action Associated Window Help

Other Adults

ID	Name	Type	Date of Birth	Start Date	End Date	Gender
1	Steven J	Adult with Significant Contact	03/03/1975			Male

Name: Steven J

Date of Birth: 03/03/1975

Gender: ☒ Male ☐ Female

Start Date: 04/01/2011

End Date:

Date Identified:

Description:

Other Adult Type

☐ Adult Living in Home ☒ Adult with Significant Contact not Living in Home

☐ Passed All Background Checks

Steven J's Relationship to Substitute Care Providers

SCP Name	Relationship

SCP Name:

Relationship:

Ready Placement Home [F. Kristen & George FFH]

Figure – L_015

Creating a Placement Home Notebook (continued)

Char/Pref Page

1. (A) Click on the Char/Pref page tab. (B) Fill in appropriate radio buttons regarding Gender, Emergency Shelter, Child Care Plan, Transportation, In Home Visits and Public Transportation. (C) Click the “+” of the Ethnicity grid to record family ethnicity. (D) Click the “+” of the Language grid to record all languages used by the family. (E) List all local schools in the Education Providers text box. Fill in all other known information in the remaining fields.

The fields on this page correspond to search fields in the Placement Facility Match dialog box. If this data is entered, and kept current, the Placement Facility Match search can be an efficient tool.

Figure – L_016

Creating a Placement Home Notebook (continued)

License Info Page

For a Foster Family Home, most data on this page is read only, and populates from the County License Case notebook or is uploaded from the License Information System.

The screenshot shows a software window titled "Resource Management - [Placement Home [George F]]". The window has a menu bar (File, Edit, Action, Associated, Window, Help) and a toolbar with icons for various functions. Below the toolbar is a tabbed interface with tabs for ID, Substitute Care Provider, Other Children, Other Adults, Char/Pref, License Info (selected), Comments, Special Projects, Payee, LA Payee, Hold Status, and Background Check.

The "License Info" tab contains the following fields and sections:

- License Information:**
 - Number: [Text Box]
 - Lic. Capacity: [Text Box with value 0]
 - Business Type: [Dropdown Menu]
 - Client Served Type: [Dropdown Menu]
 - Application Received: [Text Box]
 - Issue Date: [Text Box]
 - Expiration Date: [Text Box]
 - Licensing Worker Name: [Text Box]
 - Phone Number: [Text Box]
 - Ext: [Text Box]
 - Licensed By:**
 - ☐ Not Applicable
 - ☐ CCL
 - ☒ County
- ☐ Certification Form Completed
- Certified Pending Licensure History:**

Start Date	End Date

Start Date: [Text Box] End Date: [Text Box]
- Application Status History:**

Application Status	Start Date	End Date
- License Status History:**

License Status	Start Date	End Date

The status bar at the bottom shows "Ready" and "Placement Home [F, Kristen & George FFH]".

Figure – L_017

Creating a Placement Home Notebook (continued)

Comments Page

The Comments page is for viewing or entering comments about the placement home. Comments are intended to be helpful to staff persons who are trying to match a child with a placement home. There is no information for this page.

The screenshot shows a software application window titled "Resource Management - [Placement Home [George F]]". The window has a menu bar with "File", "Edit", "Action", "Associated", "Window", and "Help". Below the menu bar is a toolbar with several icons representing different functions. The main area of the window is divided into tabs: "ID", "Substitute Care Provider", "Other Children", "Other Adults", "Char/Pref", "License Info", "Comments", "Special Projects", "Payee", "LA Payee", "Hold Status", and "Background Check". The "Comments" tab is currently selected. Inside the "Comments" tab, there is a table with three columns: "Submitted By", "Date", and "Referred to Licensing". Below the table, there are input fields for "Submitted By" and "Date", a checkbox for "Referred to Licensing", and a large text area for "Description". The status bar at the bottom of the window shows "Ready" and "Placement Home [F, Kristen & George FFH]".

Submitted By	Date	Referred to Licensing
--------------	------	-----------------------

Submitted By: Date:

☐ Referred to Licensing

Description:

Figure – L_018

Creating a Placement Home Notebook (continued)

Special Projects Page

Use this page to view or enter information about special projects in which the placement home participates. There is no information for this page.

Resource Management - [Placement Home [George F]]

File Edit Action Associated Window Help

Special Projects

+	Special Project	Start Date	End Date
---	-----------------	------------	----------

Special Projects

Start Date End Date

Ready Placement Home [F, Kristen & George FFH]

Figure – L_019

Creating a Placement Home Notebook (continued)

Payee Page

1. (A) Click on the Payee page tab. (B) Record the name, address, and telephone number of the person who will be issued payment.

Resource Management - [Placement Home [George F]]

File Edit Action Associated Window Help

Substitute Care Provider Other Children Other Adults Char/Pref License Info Comments Special Projects Payee LA Payee Hold Status Background Check

Payee

First Name MI Last Name
Kristen F

Street No. Street Name
1717 Side Street

City State ZIP ZIP Ext
Sacramento California 95834

Primary Phone Ext
(916) 000-2213

Foreign Country Foreign ZIP

Foreign Address Description (Province Name, etc.)

Ready Placement Home [F, Kristen & George FFH]

Payee Page:
The Payee Page populates the SOC158A-Foster Child Data Record document. It is important to maintain current information.

Figure – L_020

Creating a Placement Home Notebook (continued)

LA Payee Page

The page is used by Los Angeles County staff persons only. It displays information about the designated payee for a placement home, including the LA vendor ID number for the home.

Resource Management - [Placement Home [George F]]

File Edit Action Associated Window Help

LA Payee Information

First Name MI Last Name

Street No. Street Name

City State ZIP ZIP Ext

Phone Ext Business

LA Vendor ID

Ready Placement Home [F. Kristen & George FFH]

Figure – L_021

Creating a Placement Home Notebook (continued)

Hold Status Page

This page is used to record dates and reasons of placement holds on a home. This page is read only for all licensing staff unless the home is a Resource Family Home, Foster Family Agency Certified Resource Family Home, or Short Term Residential Therapeutic program homes.

Resource Management - [Placement Home [George F]]

File Edit Action Associated Window Help

Hold Status

Start Date	End Date	County	Reason
------------	----------	--------	--------

Start Date:

End Date:

County:

Reason:

Staff Person:

Staff Person Phone Number:

Ready Placement Home [F, Kristen & George FFH]

County Policy:
Please check
with your
individual
county for
direction on how
this page is

Figure – L_022

Creating a Placement Home Notebook (continued)

Background Check Page

This page displays background check information for substitute care providers, other adults and children in the home, and other adults with significant contact not living in the home. It is also used for relative assessment. The instructions for completing this page are covered in the Placement Student Guide.

The screenshot shows a software application window titled "Resource Management - [Placement Home [George F]]". The window has a menu bar with "File", "Edit", "Action", "Associated", "Window", and "Help". Below the menu bar is a toolbar with icons for various functions. The main area is divided into several sections:

- Background Information:** A table with two columns: "Name" and "Individual Type". It lists two individuals: "1 George F" (Substitute Care Provider) and "2 Kalyssa F" (Other Child). To the right of this table is a section titled "Individual Passed All Background Checks" with radio buttons for "Yes", "No", and "Unknown".
- Background Checks:** A table with four columns: "Background Check Type", "Requested Date", and "Received Date". Below this table are three input fields: "Background Check Type", "Requested Date", and "Received Date".
- Out of State Child Abuse Registry:** A section titled "Resided outside California in the last 5 years?" with a dropdown menu. Below this is a table with four columns: "State", "Registry", "Status Date", and "Status". Below the table are three input fields: "State", "Maintains Registry?", and "Date Requested".

The status bar at the bottom of the window shows "Ready" and "Placement Home [F, Kristen & George FFH]".

Figure – L_023

Creating a Placement Home Notebook (continued)

Saving to Database

1. (A) From the File drop-down menu, (B) select Save to Database.

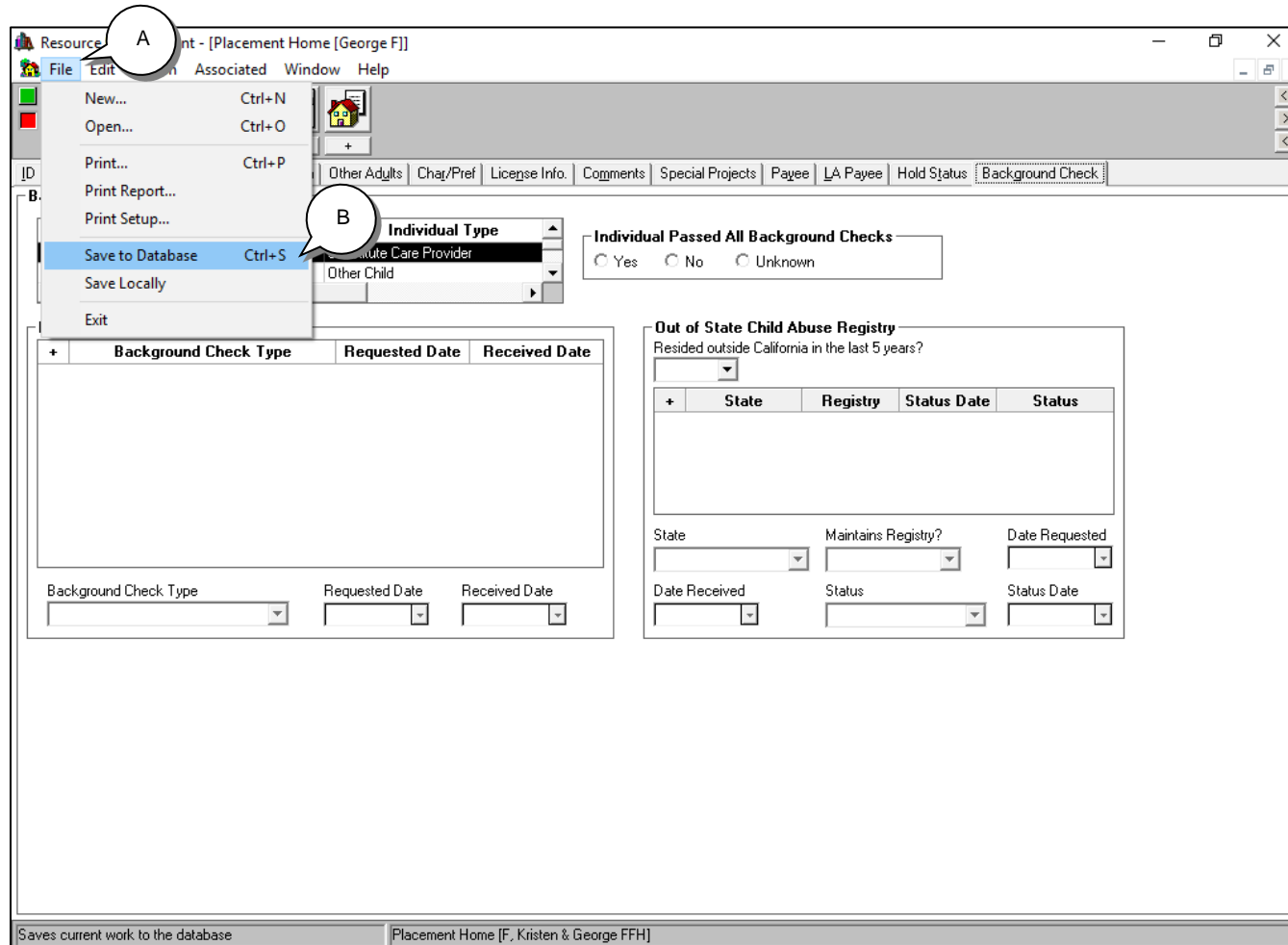


Figure – L_024

Creating a Placement Home Notebook (continued)

2. (A) Click Continue Working.

Continue working will automatically load the next Scenario Manager arc file **M08_S01 Licensing (Part 2).arc**.

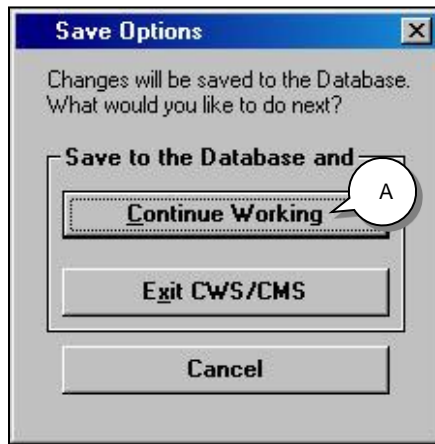


Figure – L_025

Creating a County License Case Notebook

Scenario Manager File: M08_S01 – Licensing (Part 2).arc

The County License Case notebook is located in the Placement Facilities Section of the Resource Management application. In counties that license Foster Family Homes, use the County License Case notebook to record and view information on the status and characteristics of, visits to, and issues involving county licensed homes.

1. In order to create a County License Case notebook, open the Resource Management application. (A) Click on the Placement Facilities Section (red button) and (B) click on the “+” to Create New County License Case.

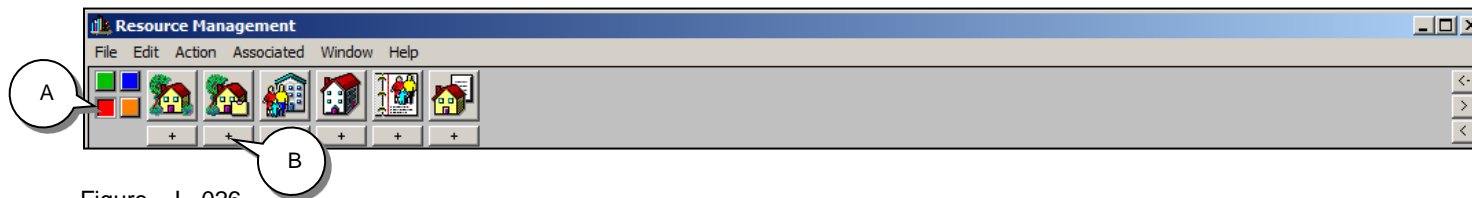


Figure – L_026

In the New dialog box, you will find a list of foster family homes in your county that do not already have a County License Case notebook.

2. (A) Select the home you want. (B) Click OK.

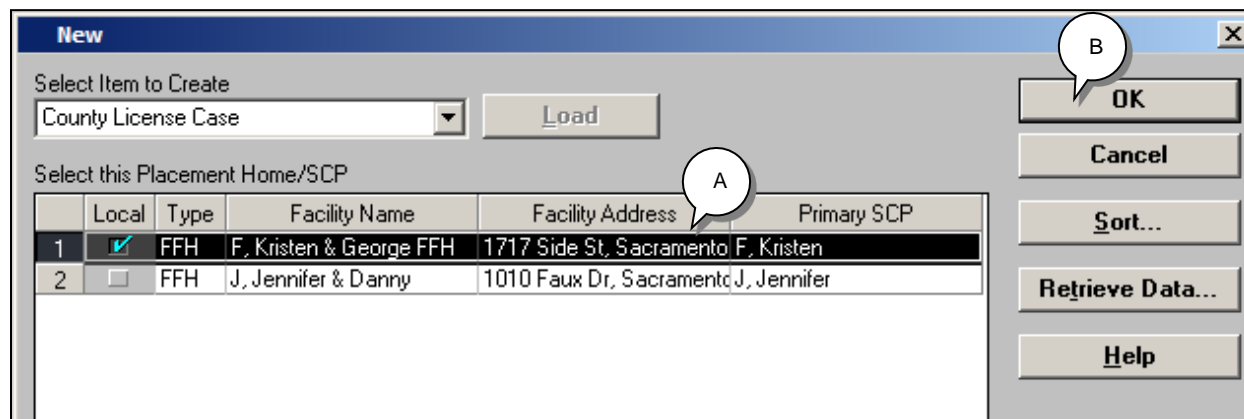


Figure – L_027

Resource Family Home:
Resource Family Home (RFH) in your county that does not have a County License Case notebook will also display in the New dialog box. To create a County License Case for RFH, select the Type of RFH and following the remaining steps, or your county specific procedures.

Creating a County License Case Notebook (continued)

ID Page

1. On the ID page, (A) record a number. This is a mandatory field and each county has its own unique numbering system. (B) Click the “+” of the Application Status grid. (C) Choose Pending in the Current Application Status drop-down menu. (D) Enter a Start Date, and (E) Application Received date. (F) Click the “+” of the License Status grid. (G) Select Pending in the Current License Status drop-down menu and record the Start Date.

The screenshot shows the 'Resource Management - [County License Case [F, Kristen & George FFH,]]' window. The 'ID' tab is active, showing the 'Identification' section with a 'Number' field (A) and a 'Placement Facility Name' field (F, Kristen & George FFH). Below this is the 'Application Status' section, which includes a grid (B) with columns for Application Status, Start date, and End Date. The grid shows one entry with 'Pending' status and '01/15/2007' start date. Below the grid is a 'Current Application Status' drop-down menu (C) set to 'Pending', a 'Start Date' field (D) set to '01/15/2007', and an 'Application Received' field (E) set to '01/15/2007'. To the right is the 'License Status' section, which includes a grid (F) with columns for License Status, Start Date, and End Date. The grid shows one entry with 'Pending' status. Below the grid is a 'Current License Status' drop-down menu (G) set to 'Pending'. The interface also includes fields for 'License Issued', 'Expiration Date', 'Annual Visit Due', 'Annual Visit Completed', 'Training Review', and 'Training Completed'. At the bottom, there is a 'Certified Pending Licensure Status' section with a table for Start Date and End Date, and a checkbox for 'Certification Form Completed'.

Resource Family Home:

For the Application Status and License Status steps, use the appropriate RFA Application and RFA License Status values.

Figure – L_028

Creating a County License Case Notebook (continued)

Characteristics Page

1. (A) Click on the Characteristics page tab. (B) Enter the License Capacity number (number of children family will be licensed for). (C) In the Foster/Resource Family Home Type drop-down menu, choose Open. (D) Record the date a fire clearance was received, and (E) enter age range of license. (F) Record gender choices by clicking the appropriate radio button.

Resource Management - [County License Case [F, Kristen & George FFH,]]

File Edit Action Associated Window Help

Characteristics Visits Issues

Characteristics

License Capacity: 4

Foster/Resource Family Home Type: Open

Fire Clearance

☒ Required Date Received: 02/15/2007

Licensed For Age

From: 0 To: 18

Licensed For Gender

☐ Male ☐ Female ☒ Both

Figure – L_029

Creating a County License Case Notebook (continued)

Visits Page

1. (A) Click on the Visits page tab. (B) Click the “+” in the Visits grid. (C) Record the Date of the visit to the home. (D) Record Type of visit by choosing “Initial” in the drop-down menu.

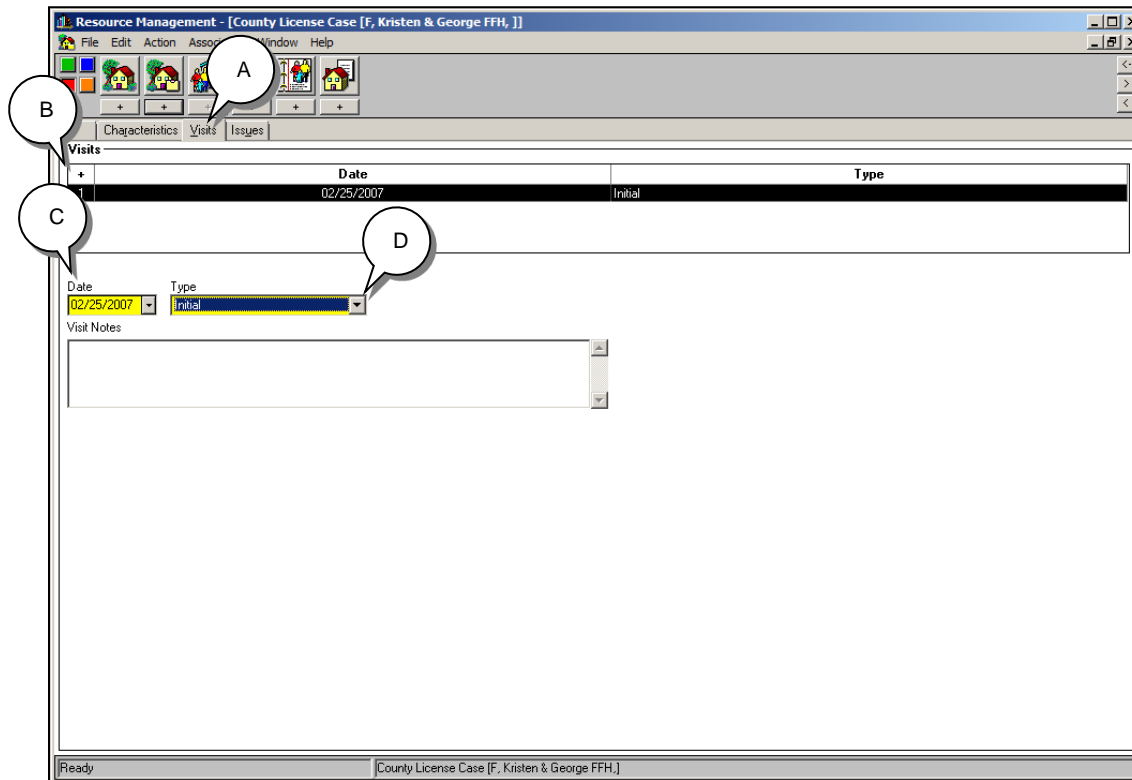


Figure – L_030

Creating a County License Case Notebook (continued)

Issues Page

1. (A) Click on the Issues page tab. Use this page to view and enter information about any outstanding licensing issues with the home.

Resource Management - [County License Case [F, Kristen & George FFH, 99999]]

File Edit Action Associated Window Help

Issues

Licensing Issues

Date	Category	Issue Type
------	----------	------------

Category

Date Issue Type Complaint Finding Deficiency Corrected

Issue Notes

Figure – L_031

Creating a County License Case Notebook (continued)

From the File drop-down menu, select Save to Database. Choose Continue Working.

Continue working will automatically load the next Scenario Manager arc file **M08_S01 Licensing (Part 3).arc**.

Creating a County License Case Notebook (continued)

Scenario Manager File: M08_S01 – Licensing (Part 3).arc.

Record License Information

1. The home is now licensed and needs to be recorded in CWS/CMS. Reopen the County License Case to record that the home is now licensed. (A) Click the open existing County License Case notebook. (B) Highlight the home. (C) Click OK.

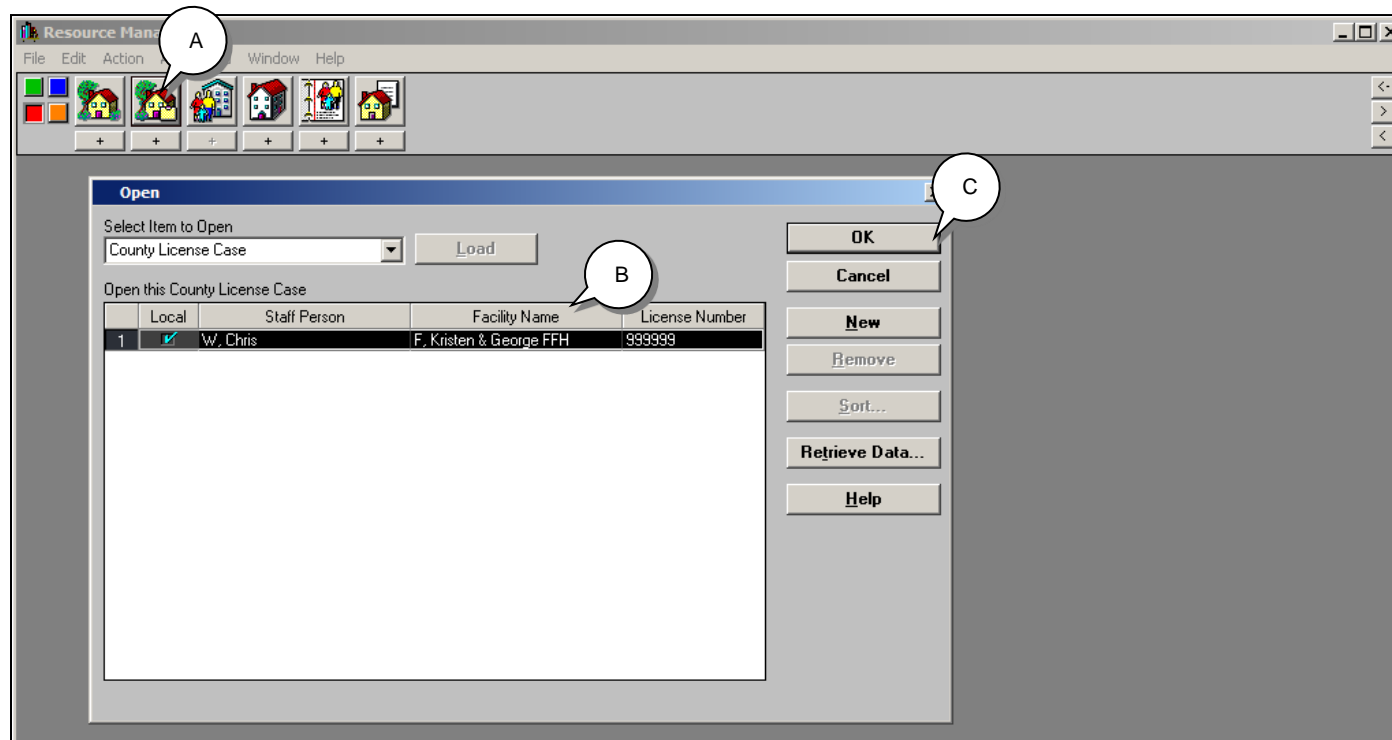


Figure – L_032

Creating a County License Case Notebook (continued)

1. According to our story the home has now been approved. (A) Click on the ID page tab. (B) Click on the “+” of the Application Status grid and (C) Select “Application Approved” in the Current Application Status field. (D) Record the date of approval in the Start Date field. (E) Click the “+” of the License Status grid. (F) Choose “Licensed” from the drop-down menu of the Current License Status field. (G) Record the start date in the Start Date field.

Figure – L_033

Assigned Staff Person:

For a Resource Family Home, the user has the option to assign a staff person from a different county to the County License Case by clicking on the binocular icon. When the staff person search dialog box is displayed, the user can choose the County drop-down and change to the appropriate county.

If the Placement Facility Type is Resource Family Home, the county of the Assigned Staff Person will be displayed in red at the top of the page.

License Status End Date:

For non-LIS Foster Family Homes or Resource Family Homes, if the License Status End Date is populated, the Placement Home End Date field will be populated on the Placement Home notebook, and the Placement Home notebook will be read only.

Annual Visit Due:

Initially, the Annual Visit Due date is set for one year from the License Issued date. After Annual Visit Completed date is entered, the Annual Visit Due Date will be updated to the Annual Visit Completed date plus one year.

Creating a County License Case Notebook (continued)

The home is now available for the placement of children.

From the File drop-down menu, select **Save to Database**. Choose **Continue Working**.

Continue working will automatically load the next Scenario Manager arc file **M08_S01 Licensing (Part 4).arc**.

Closing a County License Case

Scenario Manager File: M08_S01 Licensing (Part 4).arc.

1. (A) Open the Placement Facilities Section (red button). (B) Open an existing the County License Case notebook.

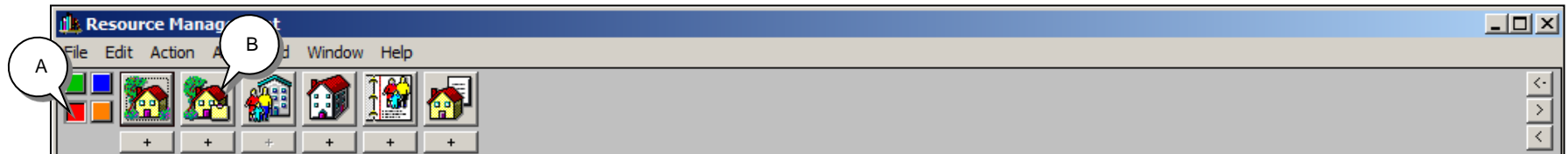


Figure – L_034

2. (C) Select the specific licensed home. (D) Click OK.

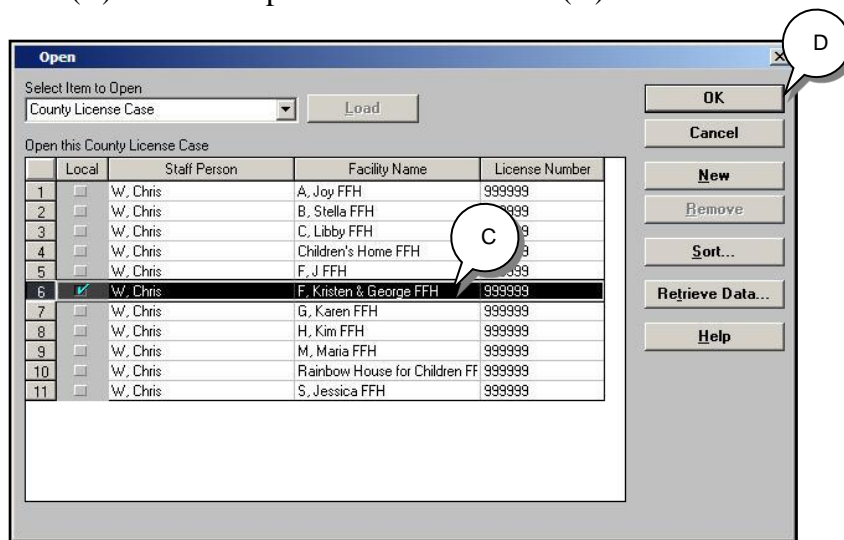


Figure - L_035

Closing a County License Case (continued)

- The ID page tab of the County License Case notebook will display. (A) Click the “+” in the License Status grid to create a new row. (B) Enter the correct value in the Current License Status drop-down list. (C) Record the start date and (D) click Yes.

Resource Management - [County License Case [F, Kristen & George FFH, 999999]]

File Edit Action Associated Window Help

ID Characteristics Visits Issues

Identification

Number: 999999 Placement Facility Name: F, Kristen & George FFH

Application Status

	Application Status	Start date	End Date
1	Application Approved	03/01/2007	05/01/2007
2	Pending	01/15/2007	03/01/2007

Current Application Status: Application Approved

Start Date: 03/01/2007 End Date: 05/01/2007 ☒ Closed

License Status

	License Status	Start Date	End Date
1	Licensee initiated closure	05/01/2007	05/01/2007
2	Licensed	03/01/2007	05/01/2007
3	Pending	01/15/2007	03/01/2007

Current License Status: Licensee initiated closure

Start Date: 05/01/2007 End Date: 05/01/2007 ☒ Closed

Application Received: 01/15/2007 License Issued: 03/01/2007 Expiration Date: Assigned Staff Person: W, Chris

Annual Visit Due: 03/01/2008 Annual Visit Completed: Training Review Date: Next Training Planned:

Training Completed: Priority Information:

Certified Pending Licensure Status

	Start Date	End Date
--	------------	----------

☐ Certification Form Completed

Figure – L_036

Resource Management - [County License Case [F, Kristen & George ...]]

[Rule 11148]
Ending the current active license status will end date the associated Placement Home and will make the Placement Home notebook read-only. Do you want to proceed?

Yes No

Figure – L_037

From the File drop-down menu, select **Save to Database** and exit CWS/CMS.

Substitute Care Provider Moves to a New Address using Process Placement Home Move command.

Scenario Manager File: M08_S01 Licensing (Part 4).arc.

The Process Placement Home move command will allow the user to move a placement home or allow the user to update an active substitute care provider's address.

(A) Open Resource Management.

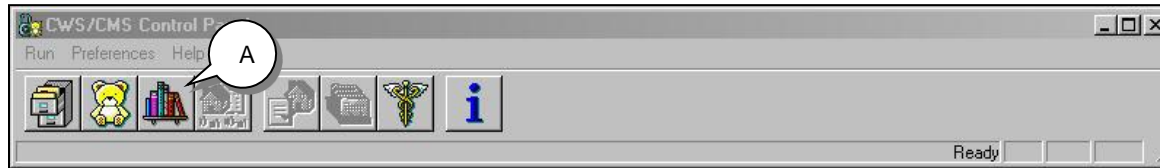


Figure – L_038

4. (A) Open the Placement Facilities Section (red button). (B) Open existing County License Case notebook and (C) select the specific licensed home. (D) Click OK.

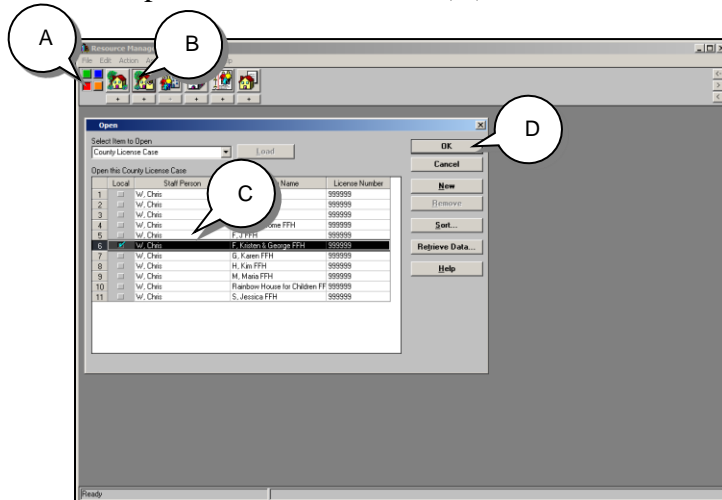


Figure L_039

Substitute Care Provider Moves to a New Address using Process Placement Home Move command (continued)

The ID page of the County Licensed Home will display.

The screenshot displays the 'Resource Management' software window for a 'County License Case [F, Kristen & George FFH, 999999]'. The interface includes a menu bar (File, Edit, Action, Associated, Window, Help) and a toolbar with icons for various functions. The 'ID' tab is selected, showing the 'Identification' section. This section contains fields for 'Number' (999999) and 'Placement Facility Name' (F, Kristen & George FFH). Below these are two tables: 'Application Status' and 'License Status'. The 'Application Status' table has columns for Application Status, Start date, and End Date, with rows for 'Application Approved' and 'Pending'. The 'License Status' table has columns for License Status, Start Date, and End Date, with rows for 'Licensed' and 'Pending'. Below the tables are dropdown menus for 'Current Application Status' (Application Approved) and 'Current License Status' (Licensed), each with 'Start Date' and 'End Date' fields and a 'Closed' checkbox. Further down are fields for 'Application Received', 'License Issued', 'Expiration Date', and 'Assigned Staff Person' (W, Chris). At the bottom, there are fields for 'Annual Visit Due', 'Annual Visit Completed', 'Training Review Date', and 'Next Training Planned', along with 'Training Completed' and 'Priority Information' text areas. A 'Certified Pending Licensure Status' section at the very bottom includes a table for 'Start Date' and 'End Date' and a checkbox for 'Certification Form Completed'.

Application Status	Start date	End Date
1 Application Approved	03/01/2007	
2 Pending	01/15/2007	03/01/2007

License Status	Start Date	End Date
1 Licensed	03/01/2007	
2 Pending	01/15/2007	03/01/2007

Certified Pending Licensure Status	
Start Date	End Date

Figure – L_040

Substitute Care Provider Moves to a New Address using Process Placement Home Move command (continued)

5. (A) Open the Placement Home notebook. (B) Choose the specific home. (C) Click OK.

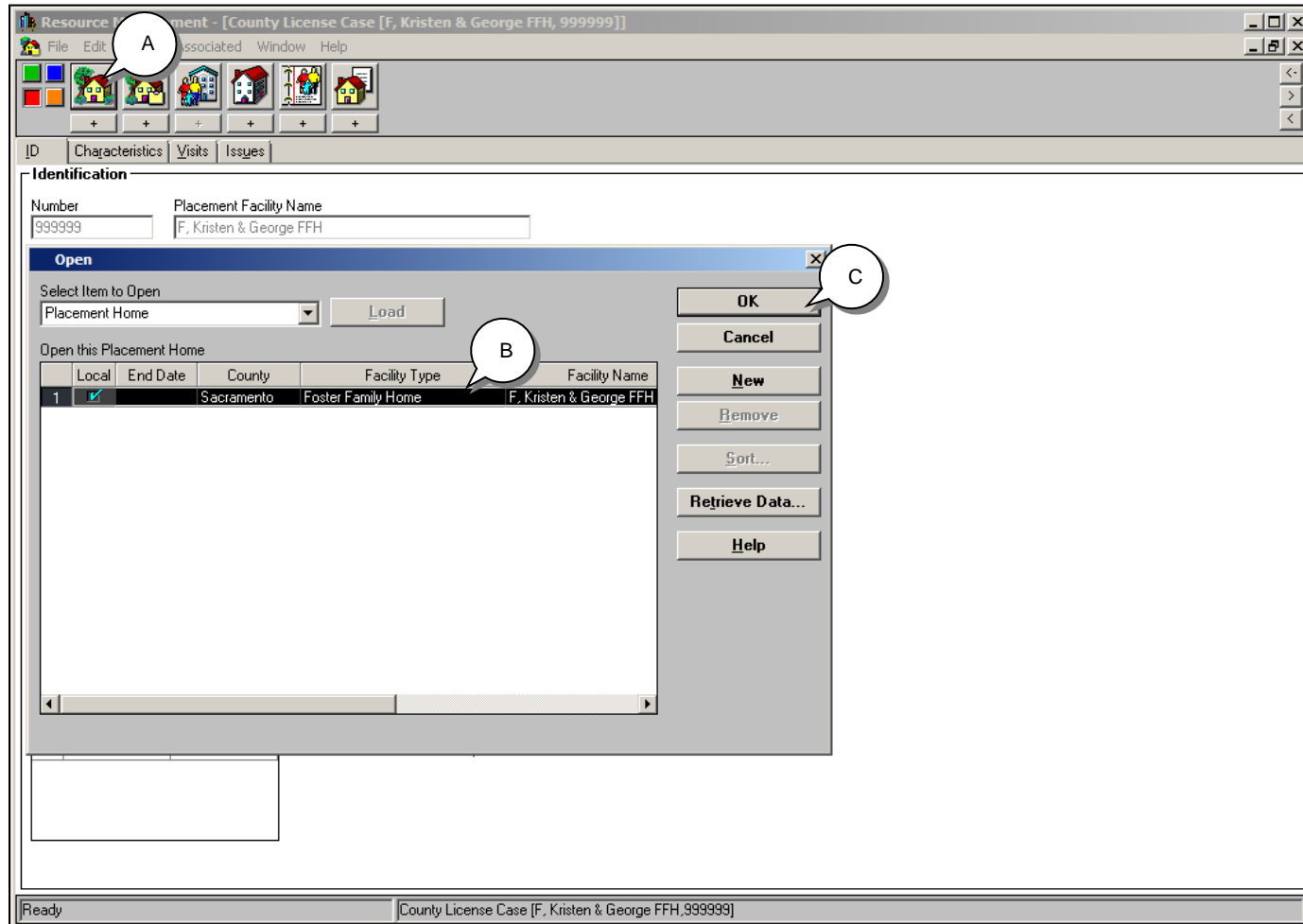


Figure – L_041

Substitute Care Provider Moves to a New Address using Process Placement Home Move command (continued)

The ID page of the Placement Home will display.

The screenshot shows a software window titled "Resource Management - [Placement Home [F, Kristen & George FFH]]". The window has a menu bar (File, Edit, Action, Associated, Window, Help) and a toolbar with icons for various functions. Below the toolbar is a tabbed interface with the following tabs: ID, Substitute Care Provider, Other Children, Other Adults, Chap/Pref, License Info, Comments, Special Projects, Payee, LA Payee, Hold Status, and Background Check. The "ID" tab is currently selected, displaying the "Identification" form.

Identification

Name: F, Kristen & George FFH
Primary Substitute Care Provider: F, Kristen

Type: Foster Family Home
Foster/Resource Family Home Type: Open
License Number: 999999

Age Range: From 0 To 18
#Placements: 1, Beds Avail: 3, Adj. Cap: 0

Backup Contact: Name, Phone, Ext. (Empty fields)

Address: Street No. 1717, Street Name Side St, City Sacramento, State California, ZIP 95834, ZIP Ext. (Empty), Geographic Region (Empty), County of Location Sacramento

Disaster Emergency Contact Information: Name, Phone, Ext, Alternate Phone, Ext (Empty fields)

Placement Home End Date: End Date (Empty), Reason Type (Empty), Comments (Empty)

Checkboxes: ☐ This home is on hold. Please see the Hold Status page. ☐ Home Inactivated by Process Placement Home Move ☐ At Capacity ☐ Adoption Only

Figure – L_042

Substitute Care Provider Moves to a New Address using Process Placement Home Move command (continued)

6. With both the County License Case and the Placement Home open, (A) Click on the Action drop-down menu. (B) Select Process Placement Home Move.

The screenshot displays the 'Resource Management' application window titled 'Placement Home [F, Kristen & George FFH]'. The 'Action' menu is open, showing various options. A callout 'A' points to the 'Action' menu, and a callout 'B' points to the 'Process Placement Home Move...' option, which is highlighted in blue. The main form contains fields for 'Primary Substitute Care Provider' (F, Kristen), 'Placement Home End Date', 'Reason Type', 'Comments', and 'Address' (1717 Side St, Sacramento, California 95834). The 'Address' section is highlighted in yellow. The 'Disaster Emergency Contact Information' section is at the bottom.

Resource Management Placement Home [F, Kristen & George FFH]

File Edit **Action** Associated Window Help

Transfer Staff...
Reassign Caseload...
Retrieve Template...
Add Template...
Attach Existing Sub Care Provider...
View Other's County License Case...
End Logon ID...
Reset Password...
Merge Attorney...
Merge Education Provider...
Merge Placement Homes...
Merge Substitute Care Provider
Process Placement Home Move...
Update Adoptive Home
Maintain Duty Workers...

Identification
Name: F, Kristen & George
Type: Foster Family Home
Foster/Resource: Open

Age Range
From: 0 To: 18

Backup Contact
Name: Phone: Ext:

Address
Street No.: 1717 Street Name: Side St City: Sacramento
State: California ZIP: 95834 ZIP Ext: Geographic Region: County of Location: Sacramento
Foreign Country: Foreign ZIP: Foreign Address Description (Province Name, etc.):
Comment:

Disaster Emergency Contact Information
Name: Phone: Ext: Alternate Phone: Ext:

☐ This home is on hold. Please see the Hold Status page.
☐ Home Inactivated by Process Placement Home Move
☐ At Capacity
☐ Adoption Only

Placement Home End Date
End Date: Reason Type: Comments:

Moves a placement home Placement Home [F, Kristen & George FFH]

Figure - L_043

Substitute Care Provider Moves to a New Address using Process Placement Home Move command (continued)

7. Enter all information from the previous home. (A) Be sure the NEW address is recorded here. (B) Click OK, the Process Placement Home Move message will display, (C) click Yes to proceed with changing the Substitute Care Provider address.

Process Placement Home Move

You are about to change this Placement Home's License Status to 'Licensee initiated closure'. A new Placement Home with the same active substitute care providers will be created. Please enter the following information that will be used to create the new Placement Home. Once the OK button is pressed, the new home will be created and all active placements will be moved to the new home.

Resulting Home Type: **Foster Family Home** License Capacity: **4**

License Status: **Licensed** End Date/Status Start Date: **05/01/2007**

License Number: **999999** Application Status: **Application Approved** App. Rec'd Date: **01/15/07**

Operated By: [Empty]

☐ Transitional Housing Placement Program Facility

Address

Street No.: **244** Street Name: **No Way**

City: **Sacramento** County of Location: **Sacramento** State: **CA** ZIP: **95834**

Primary Phone: **(916) 000-2213** Ext: [Empty]

Comments: [Empty]

Callout A points to the 'Application Status' field.

Figure – L_044

Process Placement Home Move

[Rule 07606]
The new placement home will be created.
Any associated placement home documents will be moved to the new home, and will no longer be available in the old home.
The placement home will be saved and all active placements will be moved. This process cannot be undone. Continue?

Callout C points to the 'Yes' button.

Figure – L_045

Substitute Care Provider Moves to a New Address using Process Placement Home Move command (continued)

By selecting 'Yes' in Figure L_045, the substitute care provider address will be changed and CWS/CMS and the system will automatically do the following:

8. The old placement home active license will be end dated with the Reason Type of 'Home End Dated by PPHM', and the Placement Home notebook will be read-only. A new (Resulting Home Type) placement home will be created, the active placements including adoptive placements will be moved from the old placement home to the new placement home. This includes associations to substitute care providers, county license cases, active connections to special projects, notes, other adults and children in the placement home, Adoption Home Studies, and Profiles.
9. Any associated Placement Home Documents will be moved to the new home, and will no longer be available for the old home.
10. Both the old and the new home will be saved to the CWS/CMS database.
11. The old FFH home will be end dated with the reason "Licensee initiated closure".
12. All of the children placed in the old home, will be moved to the new home.
13. Automatically saves to the database.

Close the Resource Management application and **Exit CWS/CMS**.

Foster Family Home (FFH) move to a Resource Family Home (RFH) using Process Placement Home Move command

Scenario Manager File: M08_S01 – Licensing (Part 4).arc

In addition to updating a substitute care provider's address, the Process Placement Home Move command can also be used to allow the user to move a placement home. For valid placement home types, please reference step number four in this section. For the proper user authorities and privileges, please reference the Resource Management Student Guide, Resource Management Placement Facility Maintenance privilege or CWS/CMS Help.

1. (A) Open Resource Management.

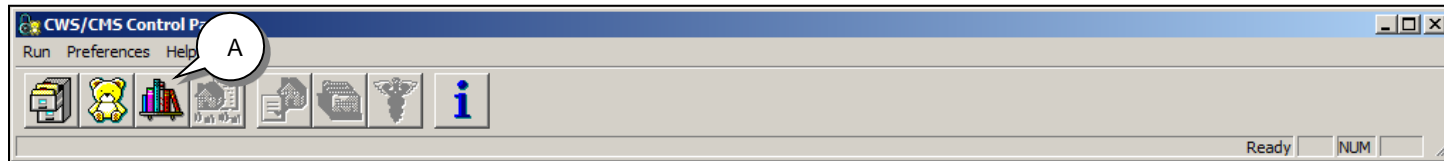


Figure - L_046

Foster Family Home (FFH) move to a Resource Family Home (RFH) using Process Placement Home Move command (continued)

2. (A) Open the Placement Facilities Section (red button). (B) Open the County License Case notebook and (C) select the specific licensed home. (D) Click OK.

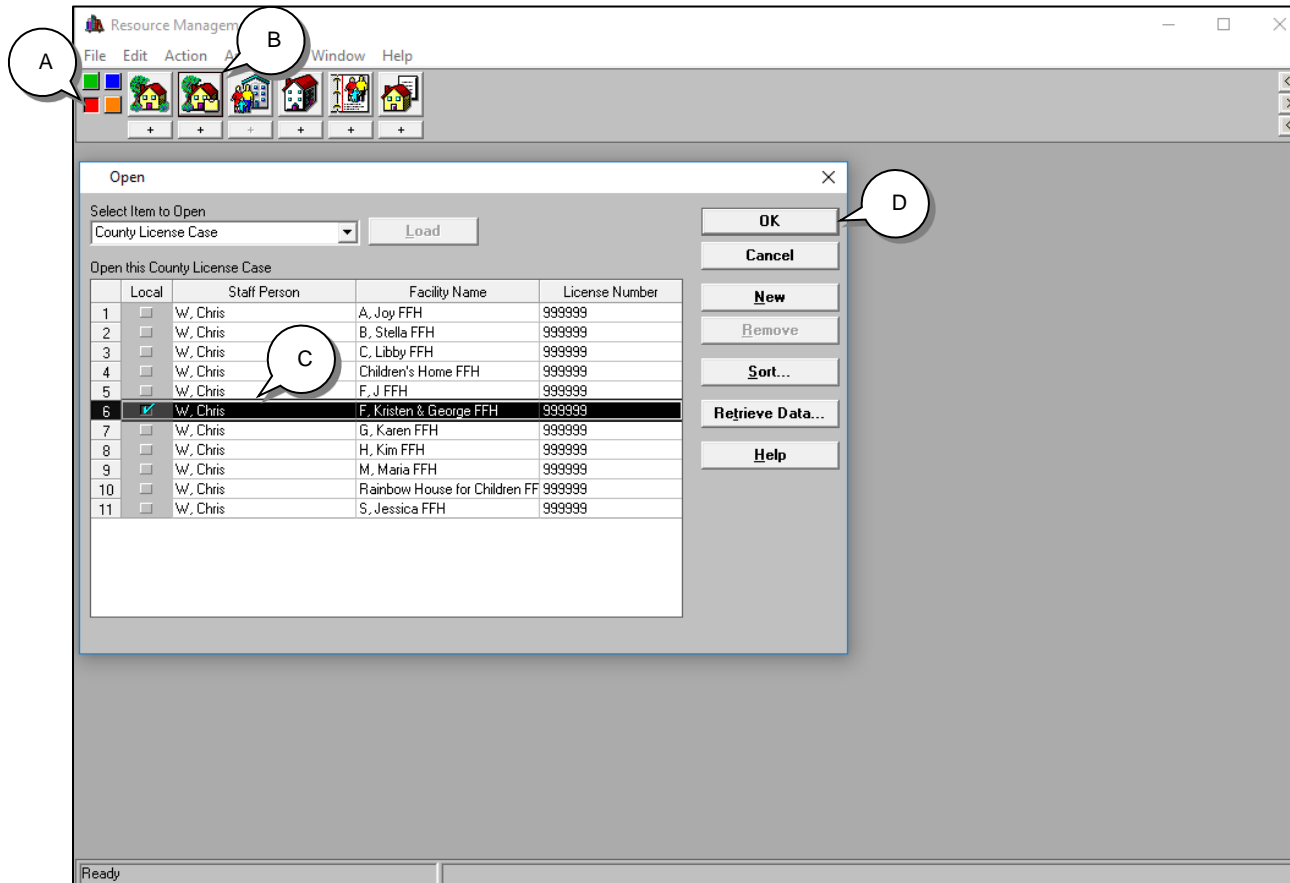


Figure - L_047

Foster Family Home (FFH) move to a Resource Family Home (RFH) using Process Placement Home Move command (continued)

The ID page of the County Licensed Home will display.

The screenshot displays the 'Resource Management' software window for a 'County License Case [F, Kristen & George FFH, 999999]'. The interface includes a menu bar (File, Edit, Action, Associated, Window, Help) and a toolbar with icons for various functions. The main window is divided into several sections:

- Identification:** Contains fields for 'Number' (999999) and 'Placement Facility Name' (F, Kristen & George FFH).
- Application Status:** A table with columns 'Application Status', 'Start date', and 'End Date'. It shows two entries: 'Application Approved' (03/01/2007) and 'Pending' (01/15/2007 to 03/01/2007). Below the table are dropdowns for 'Current Application Status' (Application Approved), 'Start Date' (03/01/2007), and 'End Date' (blank), with a 'Closed' checkbox.
- License Status:** A table with columns 'License Status', 'Start Date', and 'End Date'. It shows two entries: 'Licensed' (03/01/2007) and 'Pending' (01/15/2007 to 03/01/2007). Below the table are dropdowns for 'Current License Status' (Licensed), 'Start Date' (03/01/2007), and 'End Date' (blank), with a 'Closed' checkbox.
- Application Received:** A dropdown menu showing '01/15/2007'.
- License Issued:** A dropdown menu showing '03/01/2007'.
- Expiration Date:** A dropdown menu.
- Assigned Staff Person:** A dropdown menu showing 'W, Chris'.
- Annual Visit Due:** A dropdown menu showing '03/01/2008'.
- Annual Visit Completed:** A dropdown menu.
- Training Review Date:** A dropdown menu.
- Next Training Planned:** A dropdown menu.
- Training Completed:** A text area.
- Priority Information:** A text area.
- Certified Pending Licensure Status:** A table with columns 'Start Date' and 'End Date'. Below it is a checkbox labeled 'Certification Form Completed'.

The status bar at the bottom indicates 'Ready' and 'County License Case [F, Kristen & George FFH, 999999]'.

Figure - L_048

Foster Family Home (FFH) move to a Resource Family Home (RFH) using Process Placement Home Move command (continued)

3. (A) Open the Placement Home notebook. (B) Choose the specific home. (C) Click OK.

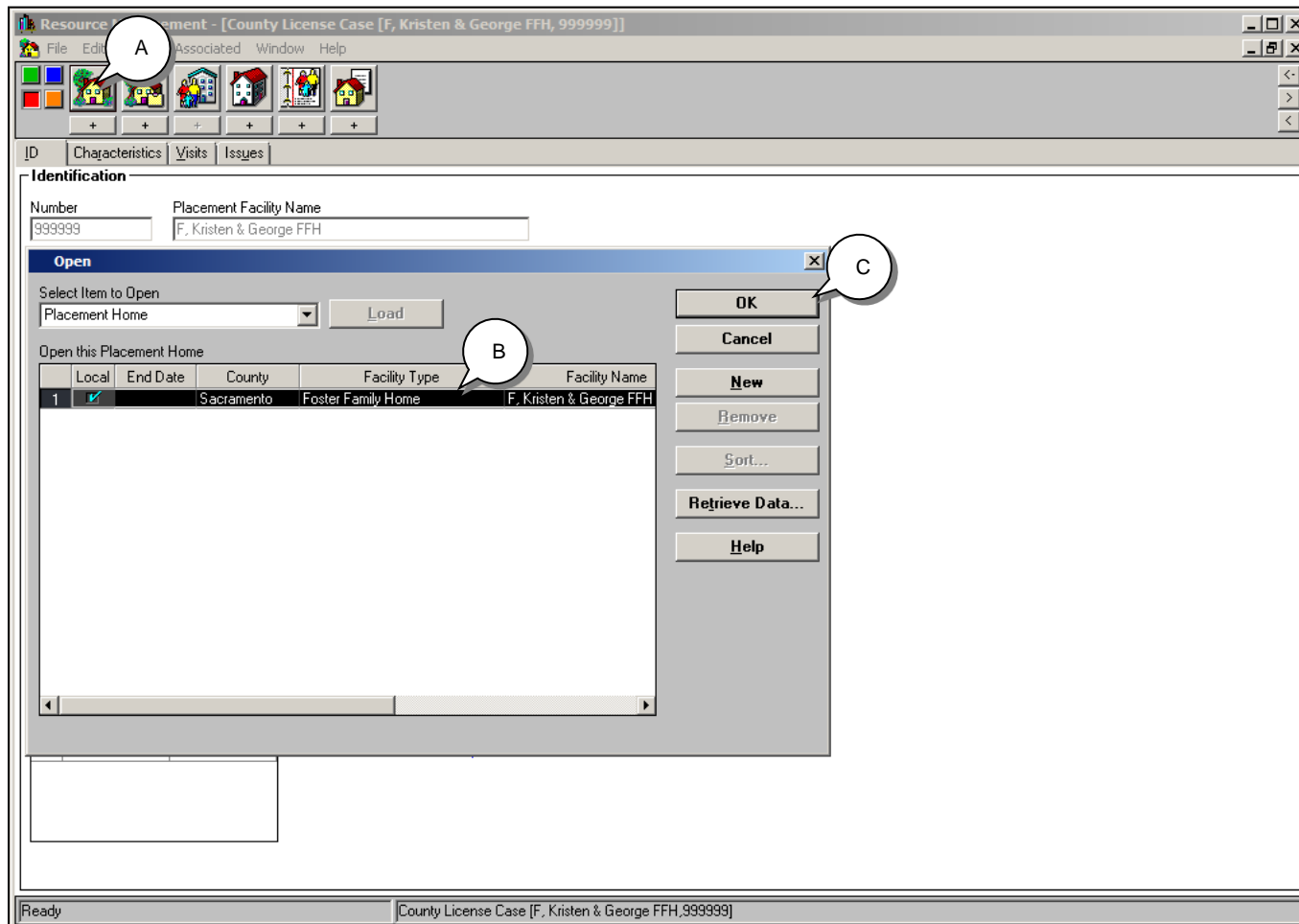


Figure - L_049

Foster Family Home (FFH) move to a Resource Family Home (RFH) using Process Placement Home Move command (continued)

The ID page of the Placement Home will display.

Resource Management - [Placement Home [F, Kristen & George FFH]]

File Edit Action Associated Window Help

ID Substitute Care Provider Other Children Other Adults Char/Pref License Info Comments Special Projects Payee LA Payee Hold Status Background Check

Identification

Name: F, Kristen & George FFH Primary Substitute Care Provider: F, Kristen

Type: Foster Family Home Operated By: []

Foster/Resource Family Home Type: Open License Number: 999999

Age Range

#Placements: 1 Beds Avail.: 3 Adj. Cap.: 0

From: 0 To: 18 Primary Phone: (916) 000-2213 Ext.: Fax: []

Backup Contact

Name: Phone: Ext.: []

Address

Street No.: 1717 Street Name: Side St City: Sacramento

State: California ZIP: 95834 ZIP Ext.: Geographic Region: County of Location: Sacramento

Foreign Country: Foreign ZIP: Foreign Address Description (Province Name, etc.):

Comment:

Disaster Emergency Contact Information

Name: Phone: Ext.: Alternate Phone: Ext.: []

Ready Placement Home [F, Kristen & George FFH]

Figure - L_050

Foster Family Home (FFH) move to a Resource Family Home (RFH) using Process Placement Home Move command (continued)

4. With both the County License Home and the Placement Home open, (A) Click on the Action drop-down menu. (B) Select Process Placement Home Move. The user has the ability to move the following types of placement homes with the Process Placement Home Move command depending on the placement scenario: FFH, RFH, FFACH, FFACRFH, and R/NREFM. Including FFHs' that populated from the License Information System (LIS). The placement home must have an active license except for R/NREFM, FFACH, and FFACRFH homes.

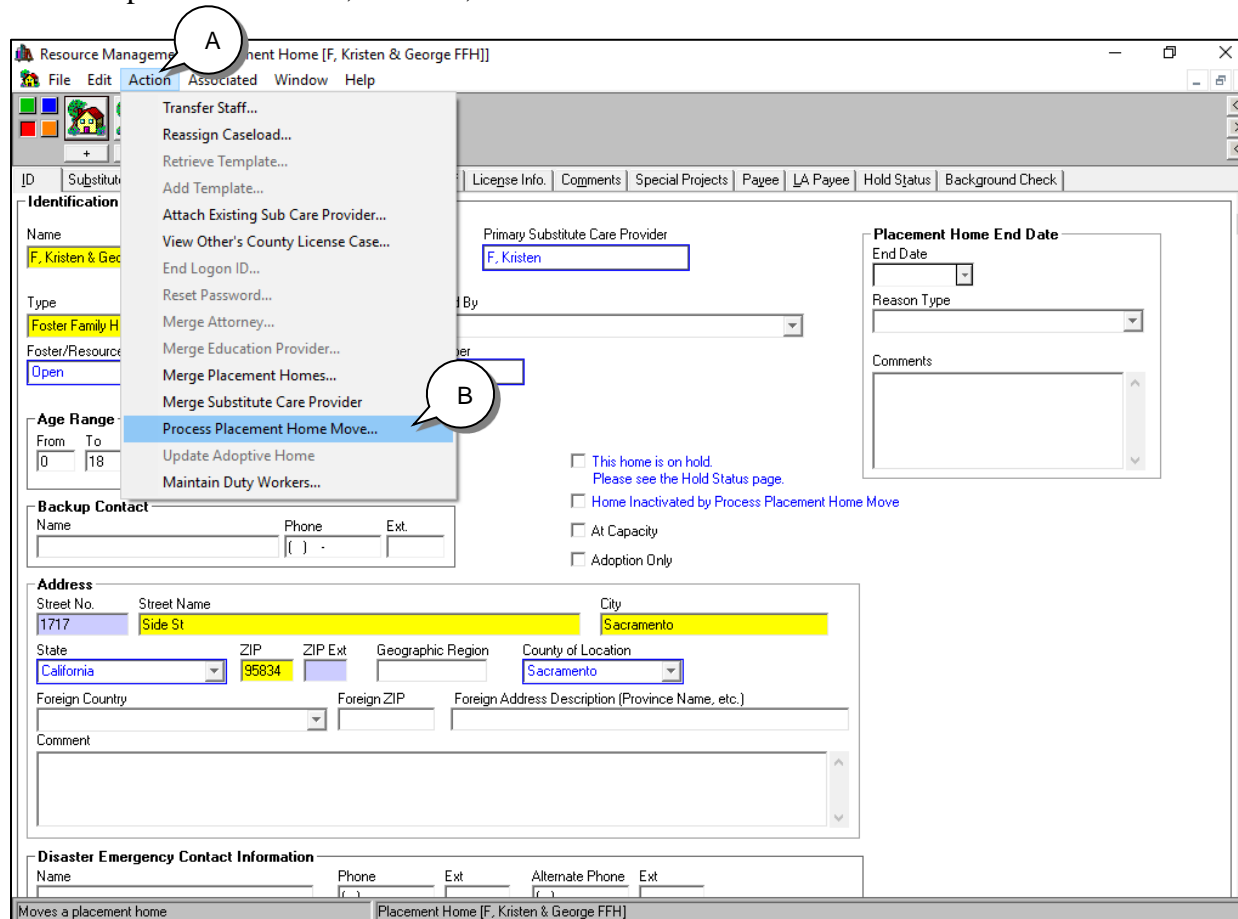


Figure - L_051

Foster Family Home (FFH) move to a Resource Family Home (RFH) using Process Placement Home Move command (continued)

- On the Process Placement Home Move dialog box, for the Resulting Home Type drop-down, (A) choose Resource Family Home. (B) Enter an End Date/Status Start Date, (C) Application Received Date, and (D) License Capacity. (E) Enter the License Number, verify the information and update all mandatory (yellow) fields. (F) Click OK, the first Process Placement Home Move message will display, (G) click Yes, to proceed with placement home move. The second Process Placement Home Move message will display, (H) click Yes to proceed with creating the new placement home.

Process Placement Home Move

You are about to change this Placement Home's License Status to 'Licensee initiated closure'. A new Placement Home with the same active substitute care providers will be created. Please enter the following information that will be used to create the new Placement Home. Once the OK button is pressed, the new home will be created and all active placements will be moved to the new home.

Resulting Home Type: **Resource Family Home** (A)

License Capacity: **4** (D)

License Status: **RFA Approved** (B)

End Date/Status Start Date: **05/01/2007**

License Number: **999999** (E)

Application Status: **Application Approved** (C)

App. Rec'd Date: **01/15/2007**

Operated By: [Empty field]

☐ Transitional Housing Placement Program Facility

Address

Street No.: **1717**

Street Name: **Side St**

City: **Sacramento**

County of Location: **Sacramento**

State: **CA**

ZIP: **95834**

ZIP Ext: [Empty field]

Primary Phone: **(916) 000-2213**

Ext: [Empty field]

Comments: [Empty text area]

Buttons: OK, Cancel, Help

Figure - L_052

County of Location:

The County of Location is set to the current county of the placement home. If the Resulting Home Type is Foster Family Home, and will be read only. If the Resulting Home Type is Resource Family Home, the County of Location is enabled for updates.

Resulting Home Type/License Status:

If the Resulting Home Type is Foster Family Home, the available License Status drop-down choices are: Licensed, Provisional License, Probationary License and Licensed Pending Incr in Capacity/Toddlers. If the Resulting Home Type is Resource Family Home, the available License Status drop-down choices are RFA Approved, and RFA Probationary.

Operated By:

The Operated By drop-down is mandatory if the Resulting Home Type is FFACH or FFACRFH. Clicking the binoculars will display a search to find the agency or organization operating the placement facility.

State:

The State defaults to the state of the placement home. The State drop-down is enabled for Resource Family Homes only to allow out of state moves.

Process Placement Home Move

[Rule 11049]
You are about to change a Foster Family Home to a Resource Family Home. Do you want to proceed?

Buttons: Yes, No

Figure - L_053

Process Placement Home Move

[Rule 07606]
The new placement home will be created. Any associated placement home documents will be moved to the new home, and will no longer be available in the old home. The placement home will be saved and all active placements will be moved. This process cannot be undone. Continue?

Buttons: Yes, No

Figure - L_054

Foster Family Home (FFH) move to a Resource Family Home (RFH) using Process Placement Home Move command (continued)

If the user selects 'Yes' in Figure L_053, and 'Yes' in Figure L_054 the new (Resulting Home Type) will be created and CWS/CMS and the system will automatically do the following:

1. The old placement home active license will be end dated with the Reason Type of 'Home End Dated by PPHM', and the Placement Home notebook will be read-only. A new (Resulting Home Type) placement home will be created, the active placements including adoptive placements will be moved from the old placement home to the new placement home. This includes associations to substitute care providers, county license cases, active connections to special projects, notes, other adults and children in the placement home, Adoption Home Studies, and Profiles.
2. Any associated Placement Home Documents will be moved to the new home, and will no longer be available for the old home.
3. Both the old and the new home will be saved to the CWS/CMS database.
4. The old home will be closed with the reason "Licensed Initiated Closure".
5. Automatically saves to the database.

Close the Resource Management application and **Exit CWS/CMS**.

Search Tips

There is no “Search” command in Resource Management.

When retrieving a placement home in Resource Management, you are limited in the criteria that you can enter and your text must be typed exactly the way it appears in the notebook. This is because there are no phonetic search options available in Resource Management.

If you need to search and retrieve a Placement Home notebook in Resource Management you need to:

- Click on “Open Existing Placement Home” notebook.
- Enter the appropriate information in the “Select Placement Home Filter” dialog box and select “OK”.
- If there are no placement homes in cache, you will need to click the “Retrieve Data” button.
- If you have difficulty retrieving a home that you know exists in the database try the following:
 - Changing to the appropriate Facility Type.
 - Changing the County field to “None” and enter only the Substitute Care Provider’s name. (Many Substitute Care Providers have provided out-of-home care for children in more than one county.)
 - Search for the home in Client Services and then use the exact spelling of the Substitute Care Provider’s name or facility name back in Resource Management. You can also copy and paste the search results information to the criteria field in Resource Management.

Placement Home Reports

The following reports may be useful to the licensing worker:

History of Placements in Home

This report lists placement information about every child that was placed in a specific placement home. You specify the home and the date range.

Substitute Care Provider Licensing History

This report provides a history of all the associated placement homes and licensing issues for a specific SCP. This is helpful when you need to know if a SCP is listed as a caretaker for more than one facility type (i.e. they are a relative home and a foster family home provider).

How Do I Create a Report?

1. Reopen Scenario Manager File: M08_S01 Licensing (Part 4).arc and open Resource Management application.
2. Open the Placement Home notebook for the specific home or SCP. Click the File drop-down menu. Select File, Print Report.
3. (A) In the Area of Interest field choose “Placement Home Reports” and then (B) select the appropriate report in the “Report Name” section. (C) Select the “Print Preview” button and walk through the remaining steps.

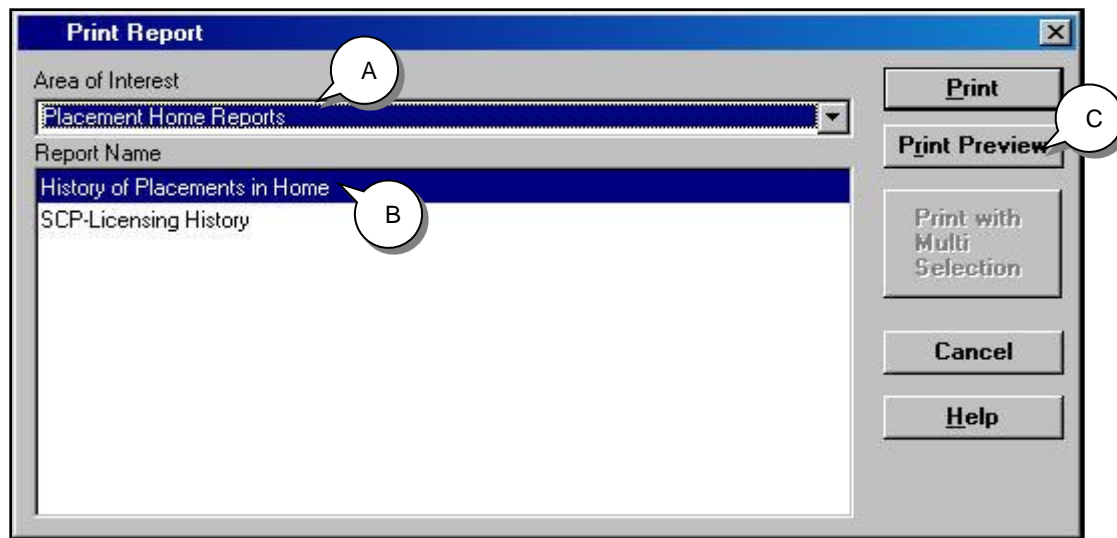


Figure – L_055

Program Management Reports

Licensing program Management Reports compile information at the statewide or countywide level from the CWS/CMS database. They are generated at the state, county, office, unit, and caseload levels.

Licensing Program Management reports provide state and county managers with the information they need to monitor and evaluate the accomplishment of the Foster Home Licensing Program goals and tasks.

Licensing Program Management reports are available on a fixed schedule according to the report frequency, and can be viewed/created at any time. The extract files for many of the reports are saved at the database, so users can create reports for past time periods as well as current reports.

1. To access Program Management Reports use the File drop-down menu, select the Print Report command and (A) Select “Program Management – Licensing” as the Area of Interest. The names of the Licensing Program Management reports will display.
2. (B) Select the report you want and (C) click the print button and walk through the remaining steps.
3. Exit CWS/CMS.

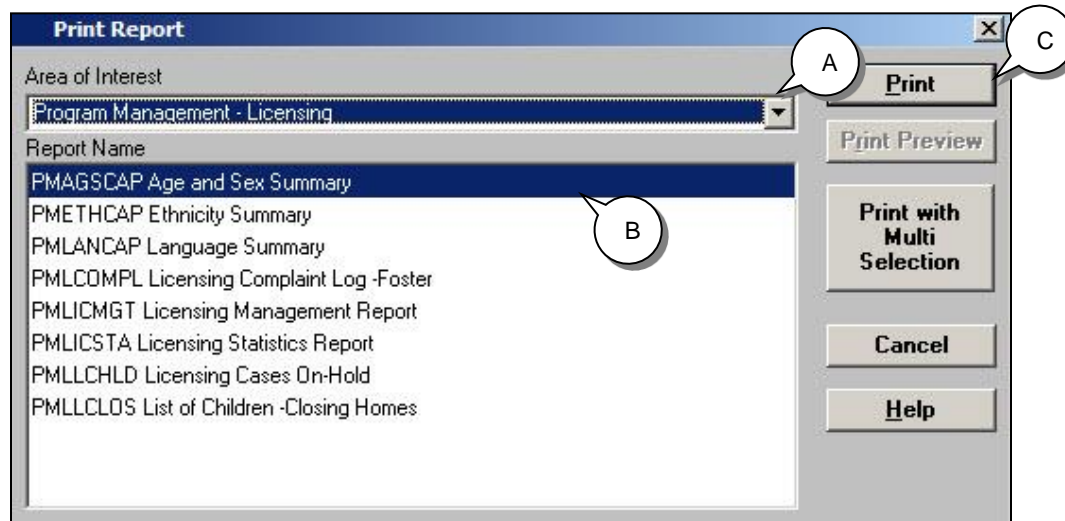


Figure – L_056

Tips & Tricks

- Can I merge duplicate County License Case notebooks?

No. The CWS/CMS application does not have a Merge County License Case notebooks function.

- Can I create a list of licensing cases assigned to me?

Yes. You can view your licensing “caseload” by clicking on the Open Existing County License Case icon.

In the Open dialog box, click the Sort button. In the Sort Order dialog box, select Staff Person as the 1st Sort Key, Facility Name as the 2nd Sort Key, and License Number the 3rd Sort Key.

- Can I view a county license case assigned to other staff persons in my county?

Yes. Use the “View Other’s County License Case” command in the Action drop-down menu.

The county license cases of other staff in your county will be read only.

- If a home was previously closed, do I create a new home or modify the existing one?

There are pros and cons (affecting the outcome of reports) to each of the following methods. Be sure to check with your county as to procedures.

- If the home was closed in error, you can delete the incorrect rows in the License Status grid.

On the ID page of the County License Case, update the Application Status and License Status grids to “pending” again. This will create new licensing information and therefore much of the previous information will be removed.

You can also create a new Placement Home notebook and County License Case notebook in order to preserve all the old information.

Tips & Tricks (continued)

- How do I attach an Existing Substitute Care Provider to a Placement Home notebook?

Click the Open Existing Placement Home notebook. Enter the Substitute Care Provider's name in the select Placement Home Filter dialog box, and click the OK button. When the Placement Home notebook is retrieved from the database, the associated Substitute Care Provider(s) will come into cache with it.

Bring the Placement Home notebook to which you want to attach the Substitute Care Provider notebook in focus.

From the Action menu, select the Attach Existing Sub Care Provider command.

In the Attach Existing Sub Care Provider dialog box, select the Substitute Care Provider in the Attach this Substitute Care Provider and click the OK button.

Summary

This module provided an overview of the County Licensing process. It introduced the following topics:

- Search functionality
- Creating a Placement Home
- Creating a County Licensed Home
- Closing a County Licensed Home
- Moving a Substitute Care Provider to a New Address using Process Placement Home Move command
- Moving a Foster Family Home (FFH) to a Resource Family Home (RFH) using the Process Placement Home Move command
- Creating Reports
- Creating Program Management Reports