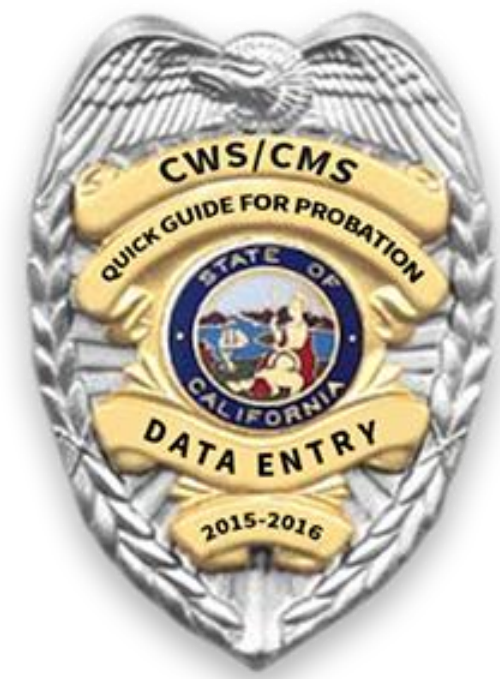
CWS/CMS

DPO Quick Guide for Probation



Resource Center for Family-Focused Practice

October 2018

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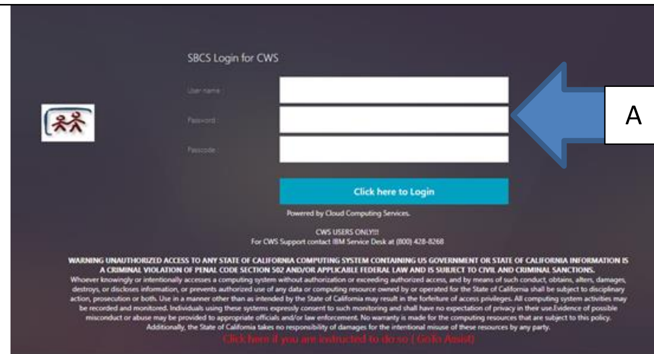
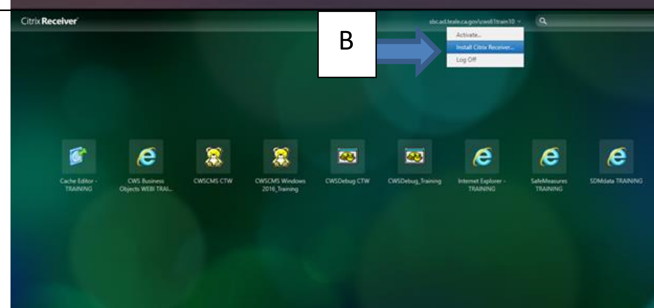
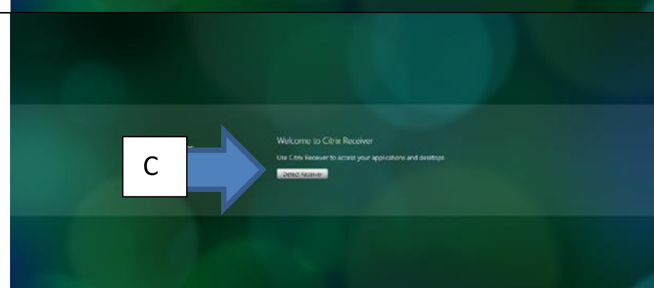
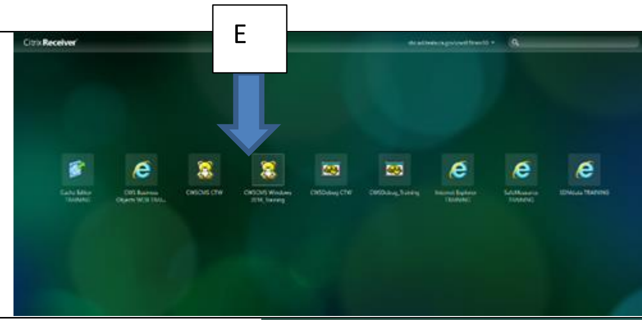
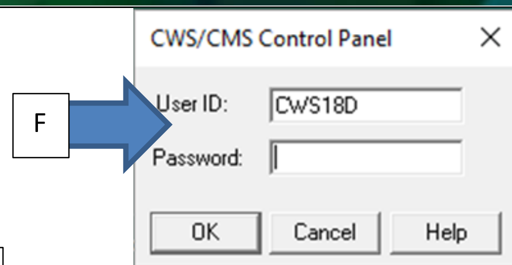
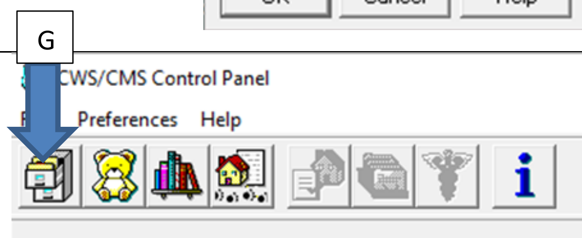
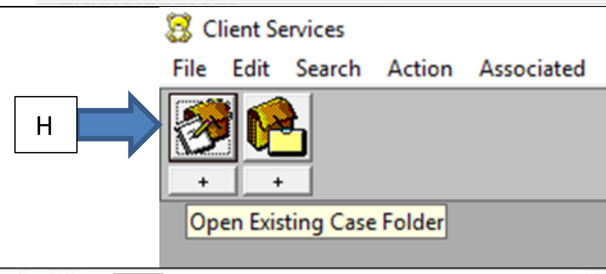
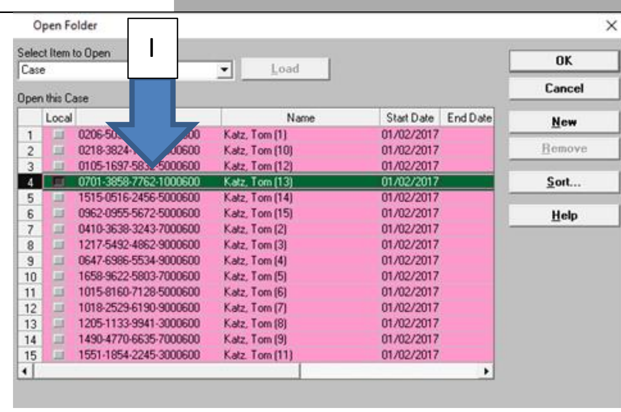
DPO Quick Guide Data Entry Instructions

CWS/CMS Web Access Log-in Instructions

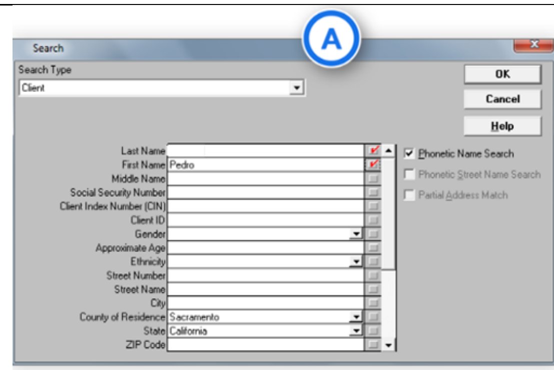
(Note: Follow your county's protocol for download of programs on your PC and seek IT assistance as required before initial download).

A. Type [https://cwstoken. access.ca.gov](https://cwstoken.access.ca.gov) into your browser. Type in your supplied user name, password, and the passcode from your token.	
B. If installing for the first time, click the arrow next to your log-in and choose "install Citrix Receiver."	
C. Click on Detect Receiver	
D. Click on "I agree" and "download."	

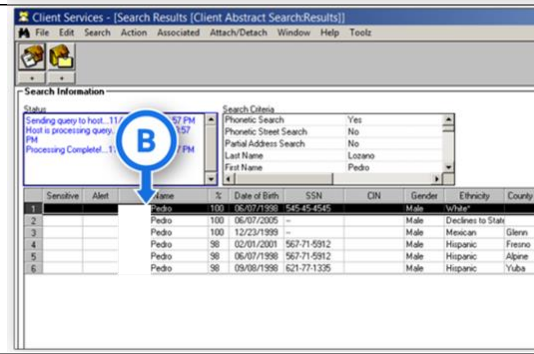
E. Click on the Teddy Bear icon once	
F. On the control panel log-in you will enter your assigned user ID and Password and Click OK. You will be prompted to change your password upon first log-in and every 90 days thereafter. Passwords are eight characters in length with an upper case, lower case, number, and/or symbol.	
G. From the control panel you will click on the Teddy Bear, client services, to access the screen with the two file folders.	
H. Click on the file folder to the right, open existing caseload.	
I. Your assigned cases will appear in this window. Highlight the case you want to open and click OK. Note: Upon data entry completion, SAVE TO DATABASE. Probation cases are always created as Non CWD (child welfare department) cases and will show as a pink line provided they have been created correctly. Child Welfare cases and Probation cases do not transfer back and forth. Dual status cases are created by the lead agency who has primary assignment and secondary assignment is given to the non-lead agency.	

Searching for Client History in CWS/CMS

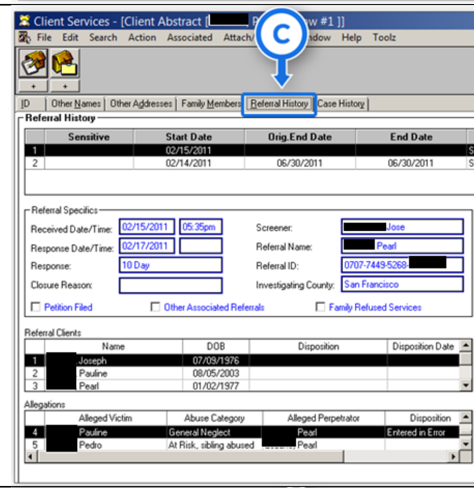
From the screen with the referral case folders, click on Search, "Start Search" and search for your client. (Be sure to include birthdate or one other search criteria to avoid exceeding maximum search results.)



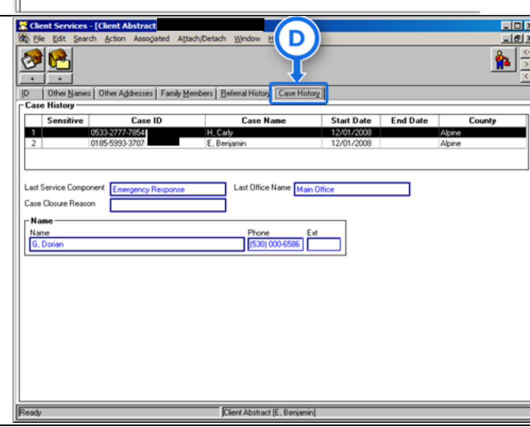
Double click on your client's name to open their client abstract.



Click on the "Referral History" tab and review CWS referrals.



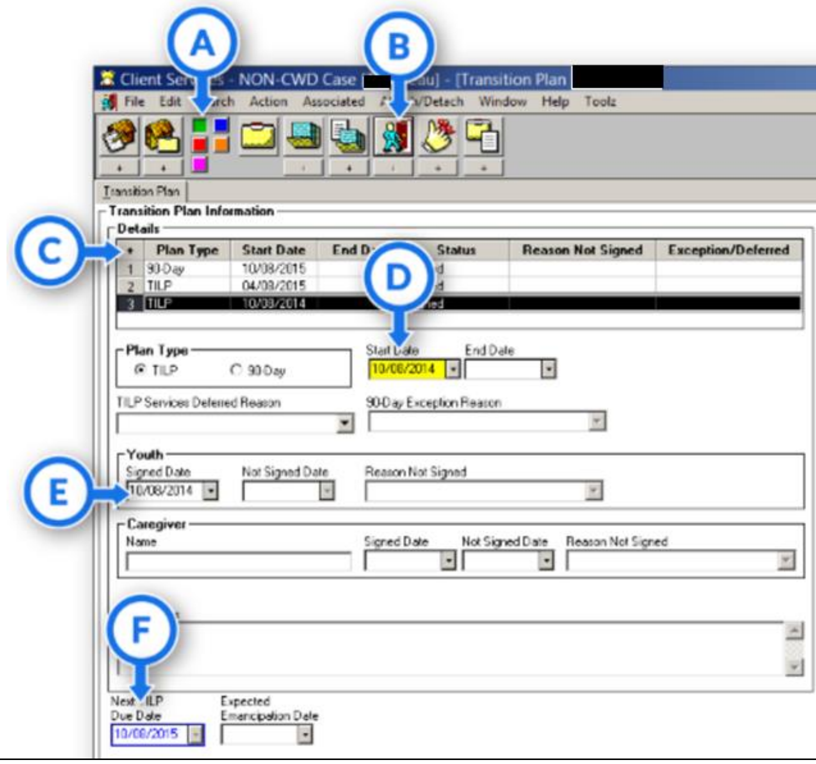
Click on the "Case History" tab to review both CWS and Probation case history.



TILP/90-Day Transition Plan

(Complete every 6 months typically corresponding with review hearing) (90-Day Transition Plan completed 90 days prior to case closure)

A. Click the green Case Management section.
B. Click the open existing Transitional Plan notebook, choose the current record, click OK.
C. Click the plus under "Details" to activate the fields (Note, default is TILP).
D. Enter start date (date you completed the TILP) or date services were deferred and reason from drop-down menu.
E. Enter the date the youth signed the TILP or the date TILP not signed and the reason from drop-down menu. (You must document a signed date or you will not be in compliance).
F. Note the date next TILP is due.



(Complete the 90-day transition plan following the steps above and indicate 90-day exemption reason if applicable)

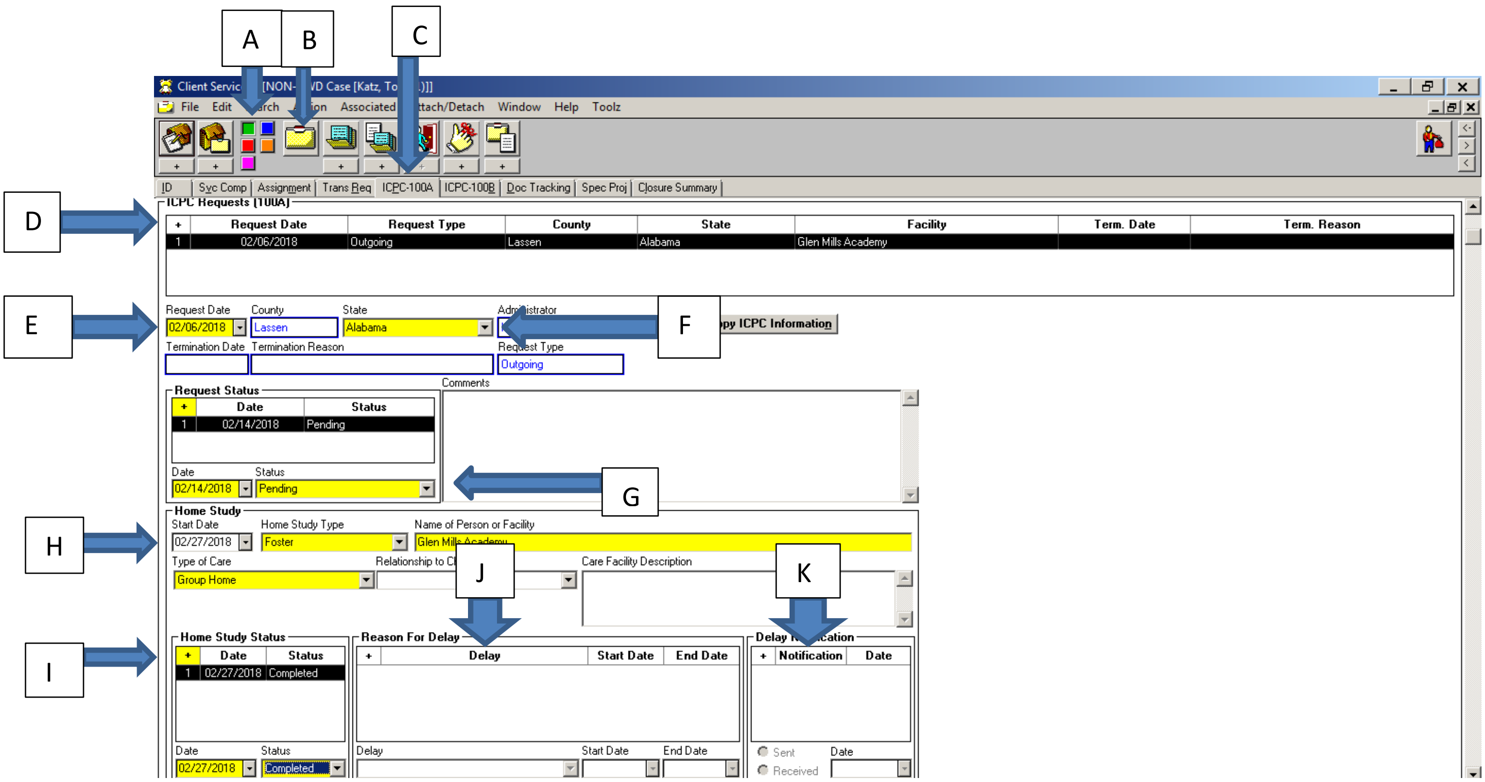
Note: You will not be able to end your case without documenting the 90-day transition plan for youth 17-1/2 and older. Both the TILP and 90-day template documents are available in CWS/CMS should you choose to access them but are not required to be completed in CWS/CMS by probation.

SAVE TO DATABASE

ICPC 100A and 100B

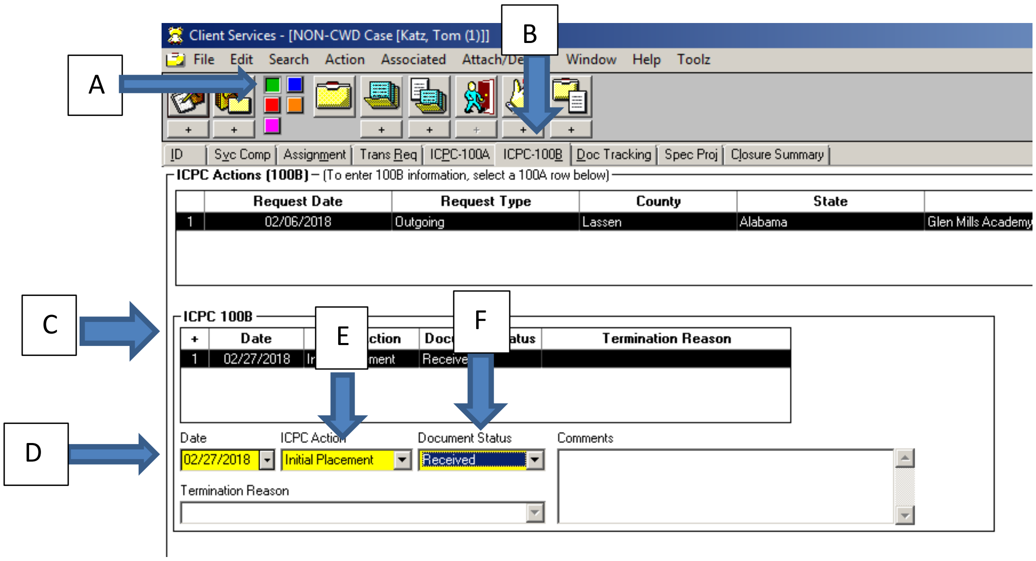
Per ACL 14-41, the following instructions are to be completed in CWS/CMS for any youth placed out of state.

A. Click the green Case Management section.
B. Click on the manila file folder icon for open existing case
C. Click on the ICPC 100A page tab.
D. On the open page, click the plus under ICPC Requests-100A.



E. Enter your request date.
F. Enter the state you’re making the request to.
G. Enter request status as applicable.
H. Enter Home Study.
I. Enter Home Study status.
J. Enter the reason for delay if applicable.
K. Enter the delay notification if applicable.

SAVE TO DATABASE



A.	Click the green Case Management section.
B.	Click on the ICPC 100B page tab.
C.	On the open page click the plus sign under ICPC-100B.
D.	Enter the date.
E.	Enter the ICPC action from the drop-down menu. (Note: if you check termination, the termination window will activate for you to indicate the reason for termination.)
F.	Enter the document status from the drop-down menu.

SAVE TO DATABASE

Special Project Codes for Dual-Status Youth

Per ACL 17-59 the following project codes should be checked for tracking dual-status youth.

- S-Dual Status

A youth who is a dependent (pursuant to WIC section 300) and simultaneously a ward (pursuant to WIC section 601/602) of the juvenile court. Use the date when jurisdiction is obtained by both entities.

- S-Dep 300 receiving Prob SRVCS.

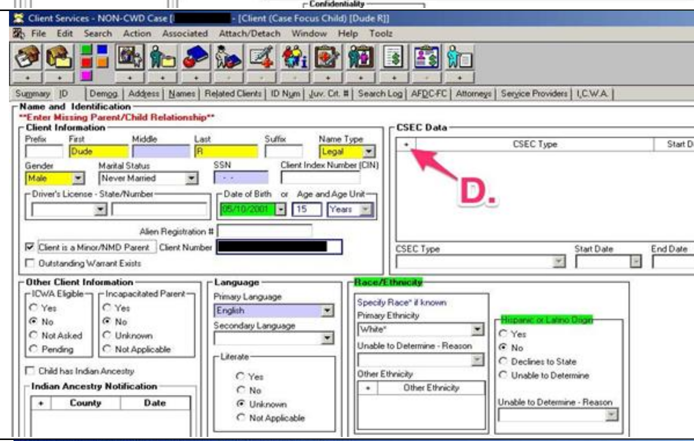
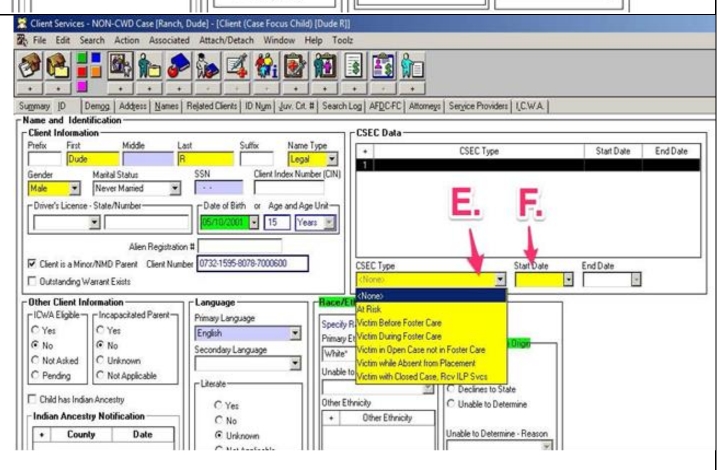
A youth who is a dependent (pursuant to WIC section 300) and simultaneously receiving services from probation (i.e. a probation officer has been assigned to provide some level of youth oversight). The start date is the date the probation officer is assigned; the end date is the date when the officer is no longer assigned.

- S-Ward 601/602 receiving CWS

A youth adjudicated a ward (pursuant to WIC sections 601/602) and who is simultaneously receiving services from CWS (i.e., a social worker has been assigned to provide some level of youth oversight). The start date is the date the social worker is assigned; the end date is the date the social worker is no longer assigned.

Documentation of Commercially Sexually Exploited Children (CSEC)

Note: Per ACL 16-49, documentation is required for all youth who are, or are at risk of being, Commercially Sexually Exploited.

A. Click the blue client management section	
B. Click on the first notebook to the right of the colored sections for "Open Existing Client."	
C. Highlight Youth's Name and click OK	
D. From the CSEC Data window, click the + sign to activate the fields.	
E. Choose the appropriate CSEC Type from the dropdown menu	
F. Enter a Start Date.	

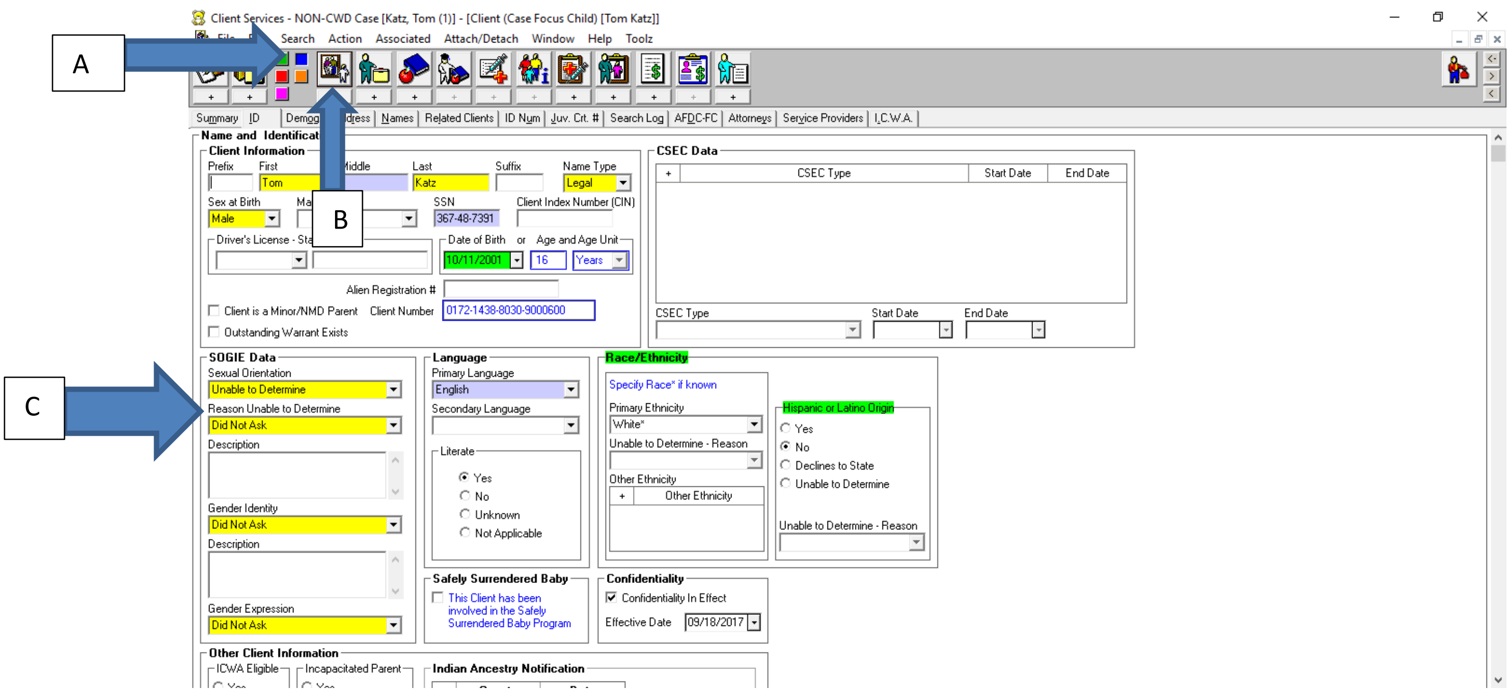
SAVE TO DATABASE

Sexual Orientation, Gender Identity & Expression (SOGIE)

Per ACL 18-44, New and revised resource materials regarding healthy sexual development and pregnancy prevention for youth in foster care.

A.	Click on the blue client management section
B.	Click on open existing client (first notebook to the right of the colored sections). Choose your client's name and click OK.
C.	Complete all 3 yellow fields under SOGIE Data

SAVE TO DATABASE



Documenting Family-Finding Efforts

Per ACL 09-86 dated December 29, 2009

<u>For Probation Cases Only</u>

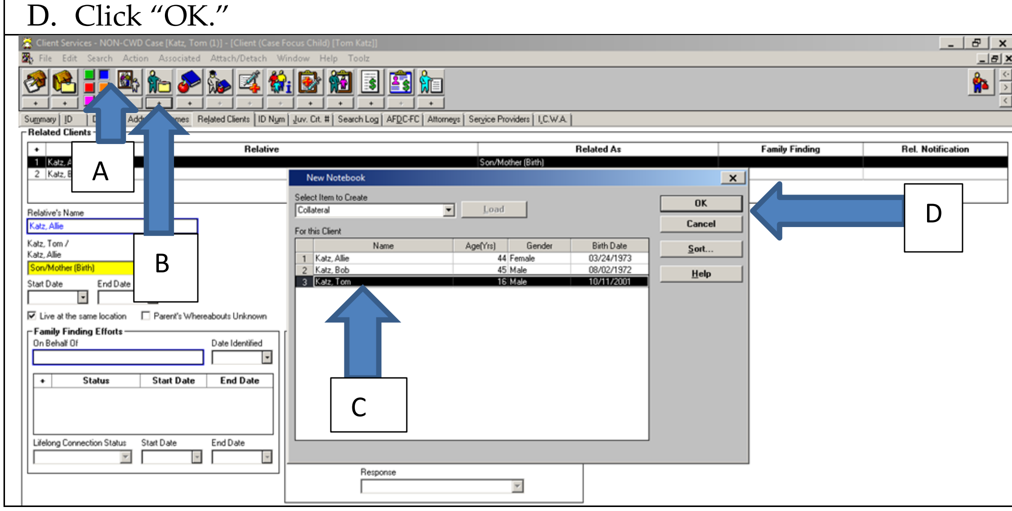
"When a minor is detained and the probation officer has reason to believe that the minor is at risk of entering foster care, the probation officer has 30 days to identify, locate and notify, in writing, all adult relatives located. When oral notification is provided by a probation officer, detailed information about the various options to help with the care and placement of the child is not required. If the probation officer did not conduct the identification and notification of relatives, but the court orders foster care placement, the probation officer shall conduct the investigation to find and notify relatives within 30 days of the placement order. Nothing in this instruction shall be construed to delay foster care placement for an individual child.

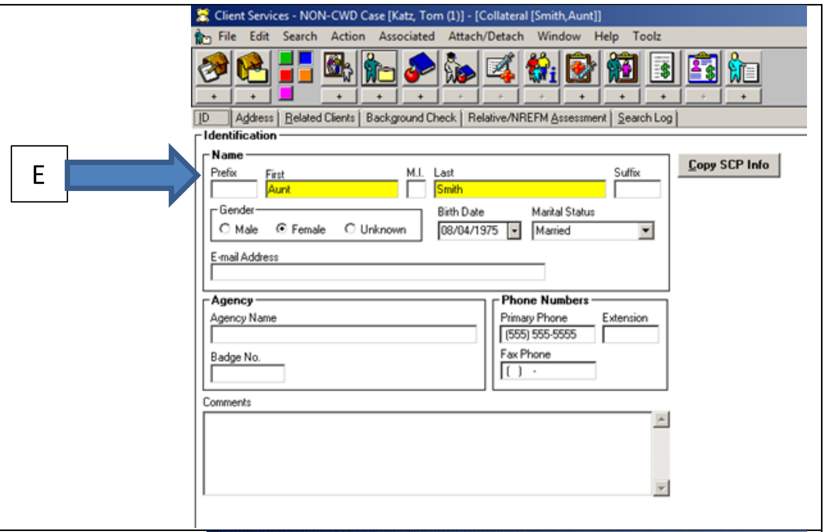
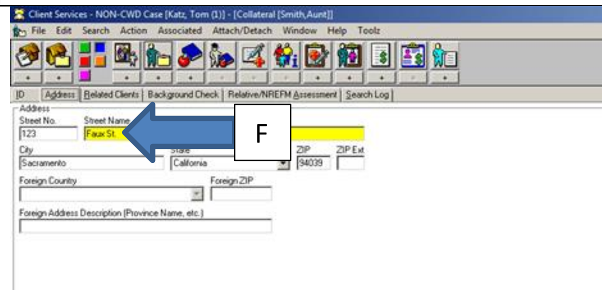
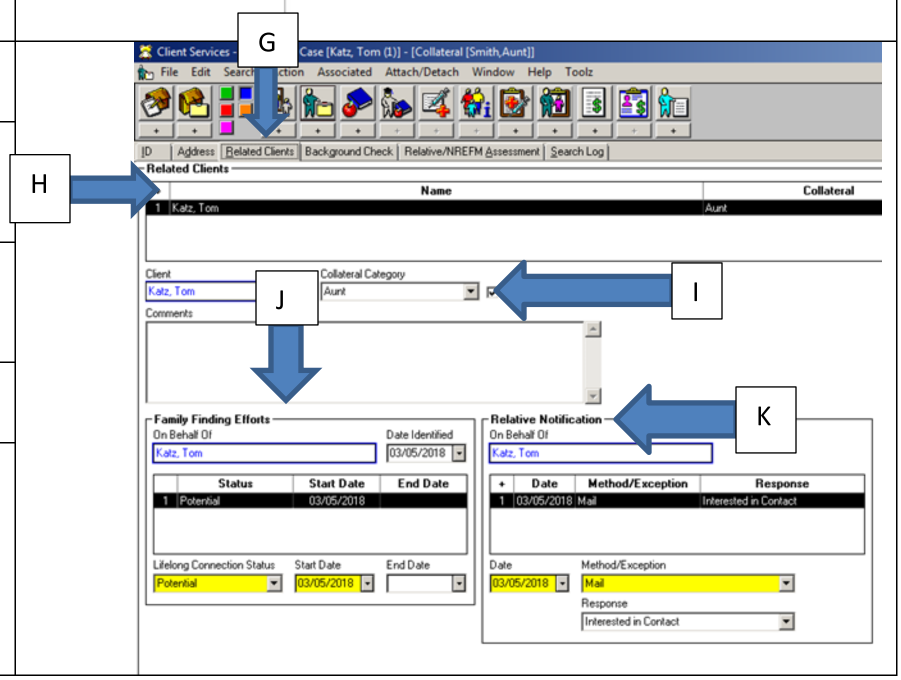
"Each county welfare and probation department shall create and make public a procedure by which relatives of a child who has been removed from his or her parents or guardians may identify themselves to the department and be provided with the notices required by statute. This process may include use of an 800 number or an email address and may be added to the 'Information for Relative' cover letter.

"All oral and written contacts with relatives are to be documented in the CWS/CMS in the Client or Collateral notebook. The next CWS/CMS update (6.4 Release) will provide the ability to record the search and engagement efforts in the Collateral notebook. As relative search and engagement is an ongoing process, continually adding updated information of family relationships is essential to ensure that all children have the greatest chance to establish lifelong relationships with family and friends for care and support."

(The following information can be recorded in the client notebook on the related clients tab or in the collateral notebook. The instructions that follow are for the collateral notebook.

A.	Click the blue Case Management section
B.	Click the plus sign under the second icon to the right of the colored sections (person standing, holding document) for create new collateral.
C.	A new window opens; highlight your client's name.
D.	Click "OK."



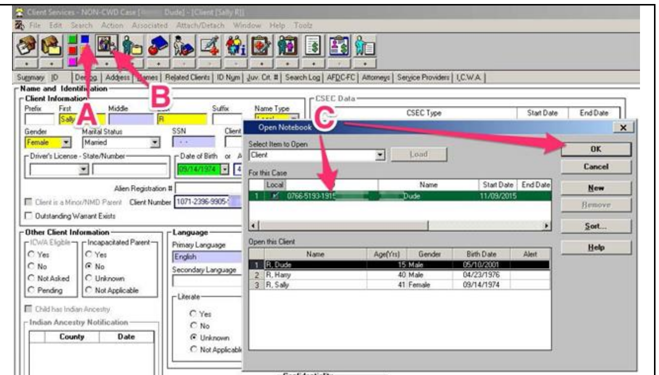
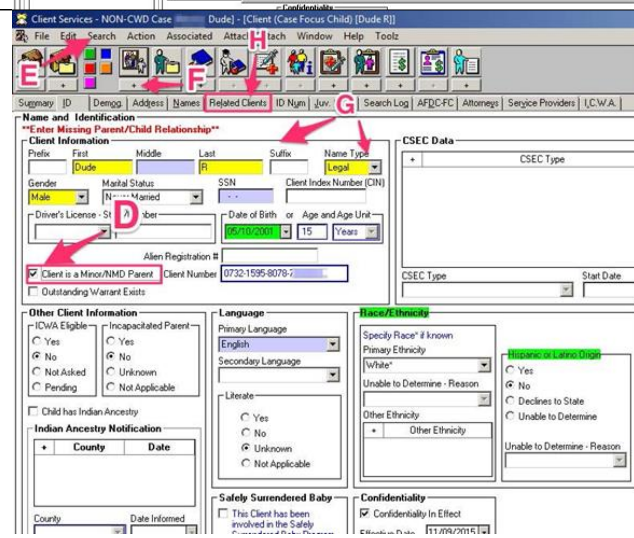
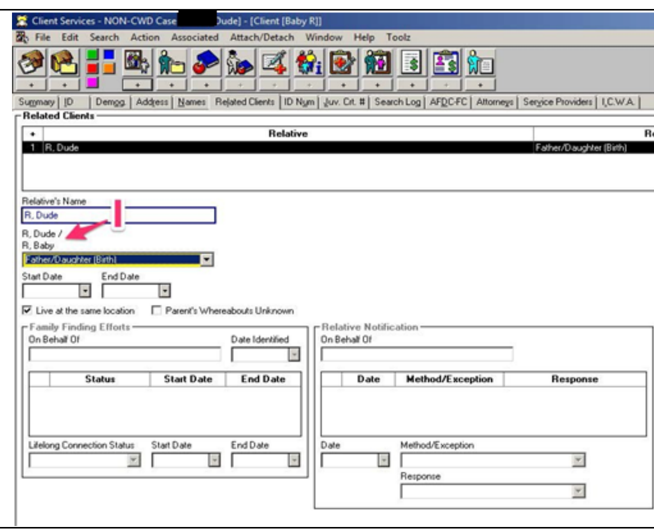
E. On the ID page, enter the relatives name and any other information you have.	
F. Click on the address tab and enter the address of the relative.	
G. Click on the Related Clients page.	
H. Click the plus sign under related clients to activate the fields.	
I. Choose a collateral category to indicate the relationship of your client to the relative.	
J. Complete the family finding efforts section as applicable.	
K. Complete the relative notification section as applicable.	

Document any contacts with the relative in the contact notebook

SAVE TO DATABASE

Documenting a Parenting Minor in CWS/CMS

ACL 16-32 (References Further Documentation in the Health Notebook)

A. Click the blue Client Management button.	
B. Click the first notebook to the right of the colored sections, "open existing client."	
C. Highlight youth's name and click OK.	
D. Click the check box for "Client is a Minor/NMD Parent." A message in red appears "Enter Missing Parent/Child Relationship.	
E. Follow Instructions in the Placement Quick guide for Searching and Attaching a Client. *(If a diligent search for your youth's child yields no results, proceed with creating a new client notebook.)*	
F. Click the plus sign under the first notebook to the right of the colored sections for "Create New Client."	
G. Complete all yellow, periwinkle and green fields on the ID page	
H. Click the "Related Clients" page.	
I. Enter the parent-child relationship. *(note: always relate the top person shown to the bottom person, as in the screen shot, father/daughter birth. The message "Enter Missing Parent/Child Relationship will now be gone from the parenting youth's client notebook.)*	

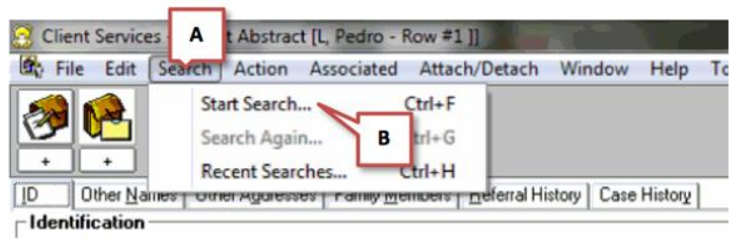
(Note: Per ACIN I-60-15 choose one of the following special project codes for a parenting minor/NMD. **This is in the green Case Management section, open existing case notebook, on the "spec proj" page tab.)**

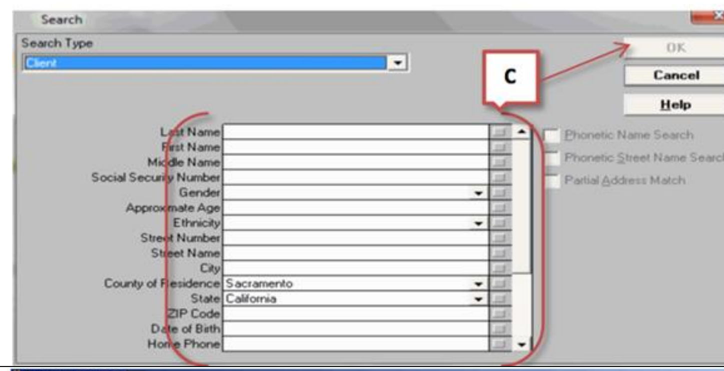
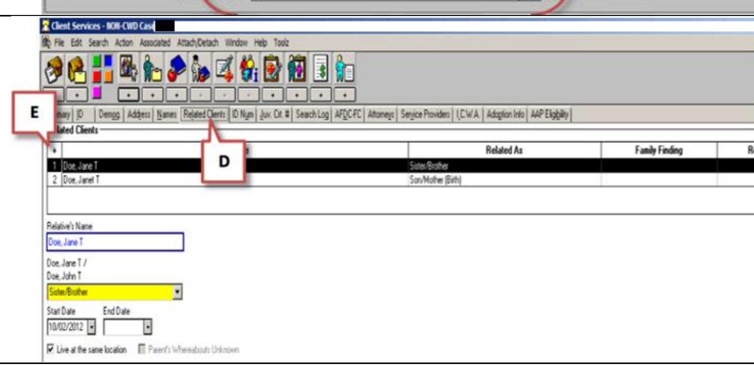
1. S-DepMinorParent + 1: The dependent is a minor parent who has one child only.
2. S-DepNonMinor Parent + 1: The dependent is a non-minor parent who has one child only.
3. S-DepMinorParent + 2: The dependent is a minor parent who has two or more children.
4. S-DepNonMinorParent + 2: The dependent is a non-minor parent who has two or more children.

S-DepMinorParent + 1 Dep: The dependent is a minor parent who has one child who is also a dependent of the juvenile court.

SAVE TO DATABASE

Searching, Attaching, and Creating Client Notebooks

<table>
<tr><td>A. In the open case, click the Search drop-down menu.</td><td rowspan="3">

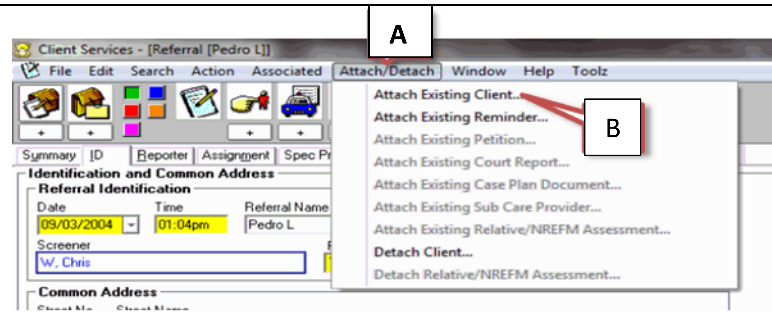

</td></tr>
<tr><td>B. Select Start Search.</td></tr>
<tr><td>C. Enter the search criteria and click "OK."</td></tr>
<tr><td>D. Double click to open the client's abstract and verify that this is the correct client.</td><td rowspan="2">
</td></tr>
<tr><td>E. Click on the "Window" drop-down menu and either select "Close Window" or select the client's non-CWD case.</td></tr>
</table>

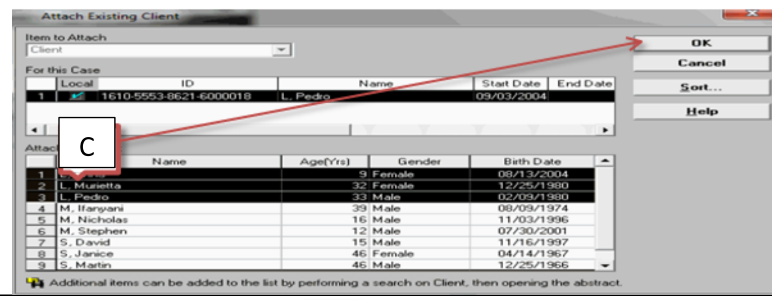
Attaching Clients

A. Click the Attach/Detach drop-down menu.

B. Select Attach Existing Client.

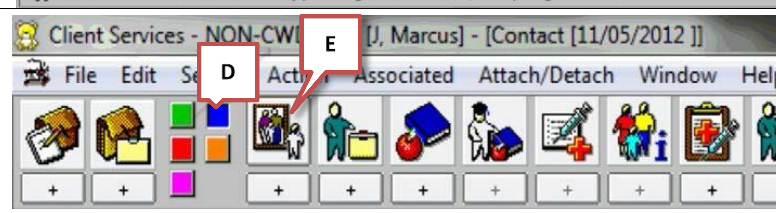
C. Select the client(s) to attach in the Attach this Client grid and OK.





D. Click the blue Client Management notebook.

E. Click the first picture icon and select the individual(s) you have attached. Update all colored fields, on the ID, Demog, Address, and Names page.

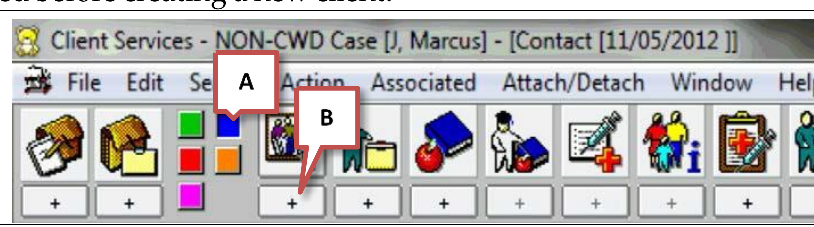


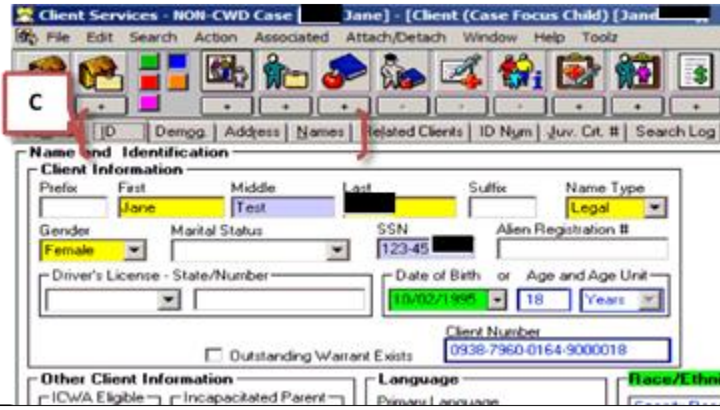
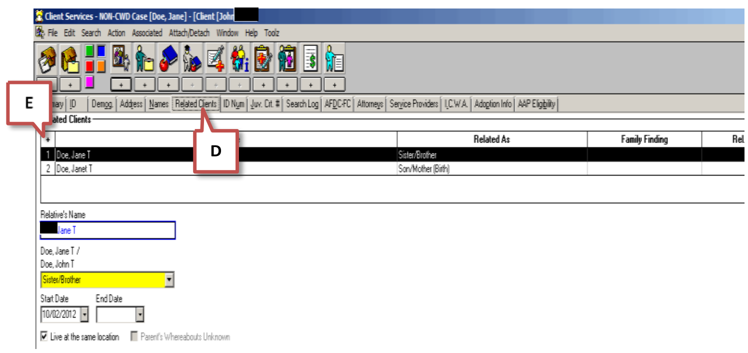
Create Client Notebook

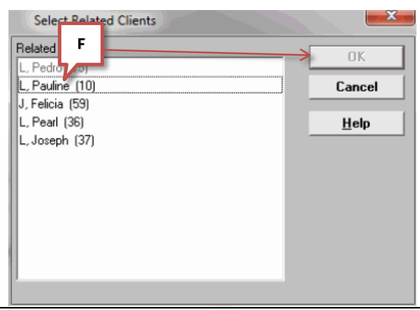
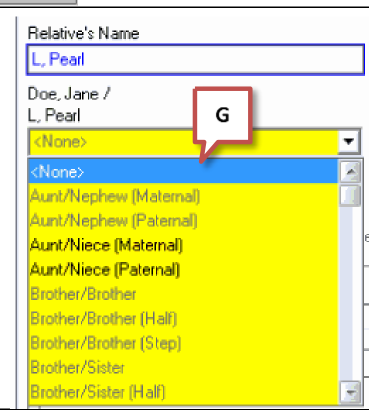
A thorough client search must be completed before creating a new client.

A. Click the blue Client Management button

B. Click "+" under the first picture icon (Create New Client)

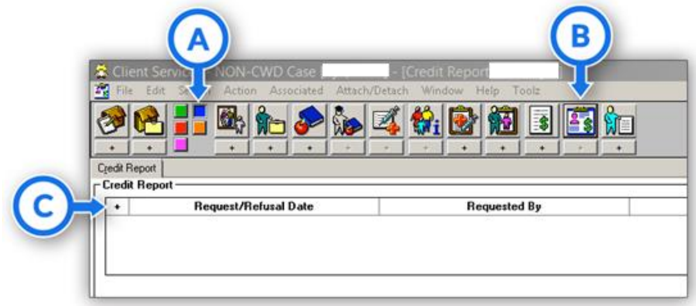
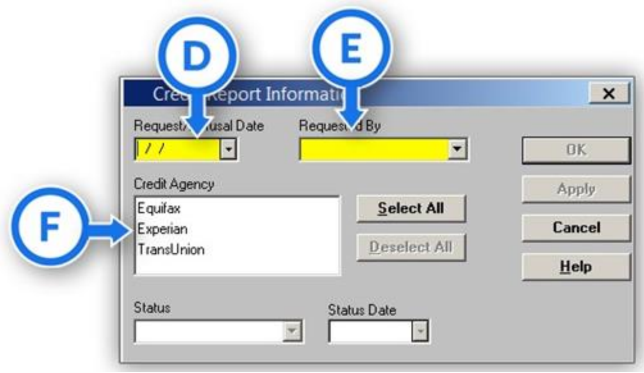
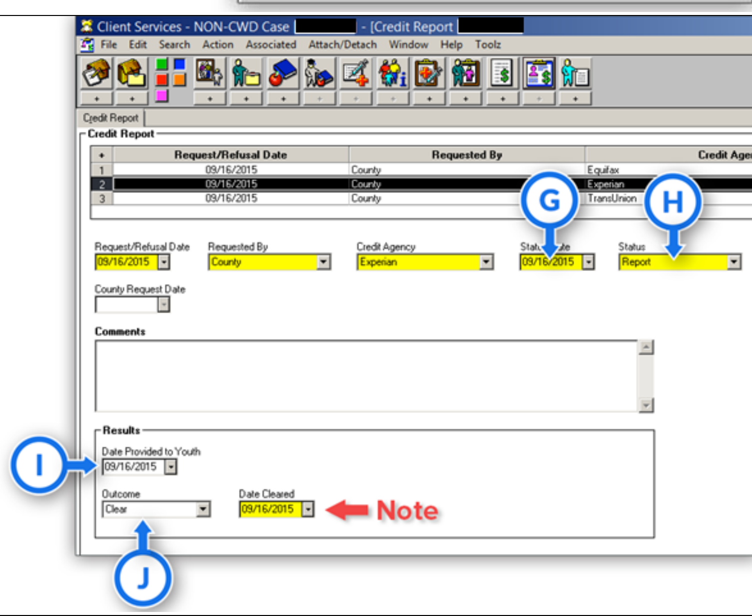


<table>
<tr><td>C. Complete all colored fields on the ID, Demog, Address and Names page</td><td>
</td></tr>
<tr><td>D. Click “Related Clients” tab</td><td rowspan="3">


</td></tr>
<tr><td>E. Click the “+” (A new window will appear)</td></tr>
<tr><td>F. Select all bold names from the list and click “OK”</td></tr>
<tr><td>G. Match the appropriate relationship to each person in the Related Clients Grid</td><td>
</td></tr>
</table>

Annual Credit Reporting/Identity Theft

Per ACL 15-98, all youth in foster care age 14 and up must have an annual credit report run from each of the three credit reporting agencies and the results documented in CWS/CMS.

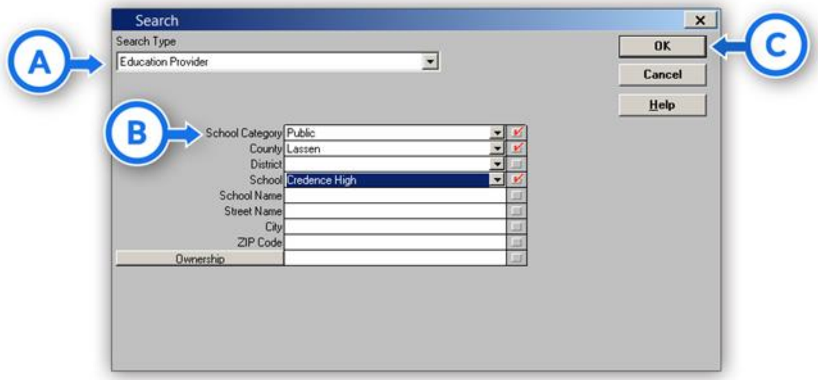
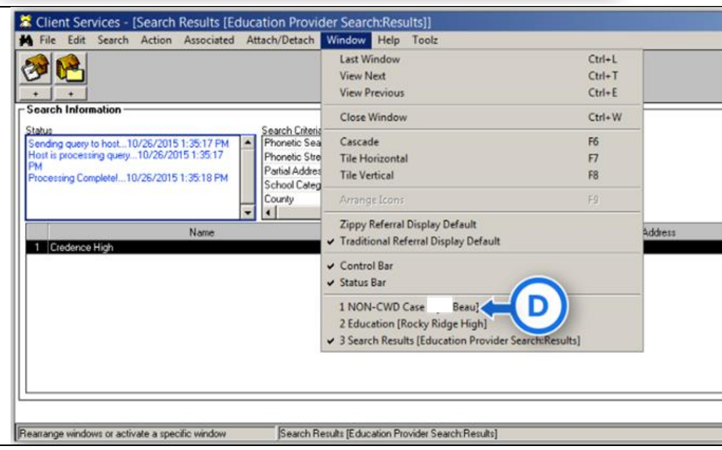
A. Click the blue Client Management button.	
B. Click the second-to-last icon notebook from the right to open existing credit report.	
C. Click the plus sign under credit reporting to activate the fields.	
D. Enter a request date.	
E. Enter requested by CDSS, County, NMD etc.	
F. Highlight Experian, Equifax, or Trans-Union individually or "select all" and click "apply."	
G. Enter the Status Date *(The date you received or did not receive a report or the date your request was rejected).*	
H. Entering a "report" was received will enable the "Results" window but only if requested by the "county" is chosen. *(Note: A county run report is required for any noted hits by CDSS run reports.)*	
I. Enter the date you provided the youth their results.	
J. Enter the outcome of "Clear" or "Not Clear."	

Note: An outcome of "Clear" and "Date Cleared" must be documented prior to case closure. You will not be able to close the case without a clear status and date cleared.

SAVE TO DATABASE

Creating/Updating an Education Notebook

Note: Before adding the youth's school you must first search for the school. The first school entered in CWS/CMS should be the youth's school of origin. Where they were attending prior to their arrest.

A. "Click Search and change the search type to "Education Provider.	
B. Enter a school category (i.e., Public, Private, etc.) and at least one other criterion to get the "OK" button enabled.	
C. Click "OK."	
D. From the search results screen click on the window drop-down menu and click any open window to get back in the case.	

E. Click the blue Client Management button.

F. Click the plus sign under the school book with the apple icon, highlight the school you just searched for and click “OK.”

G. Complete all yellow, green and periwinkle fields on the Enrollment and Grade Level pages.
(Note: if this is not the first school you’re entering you will be prompted to answer the “School of Origin” questions, indicating the date the decision was made to not keep the youth in their school of origin and choosing their school of origin from the “Education Provider” drop-down menu.)

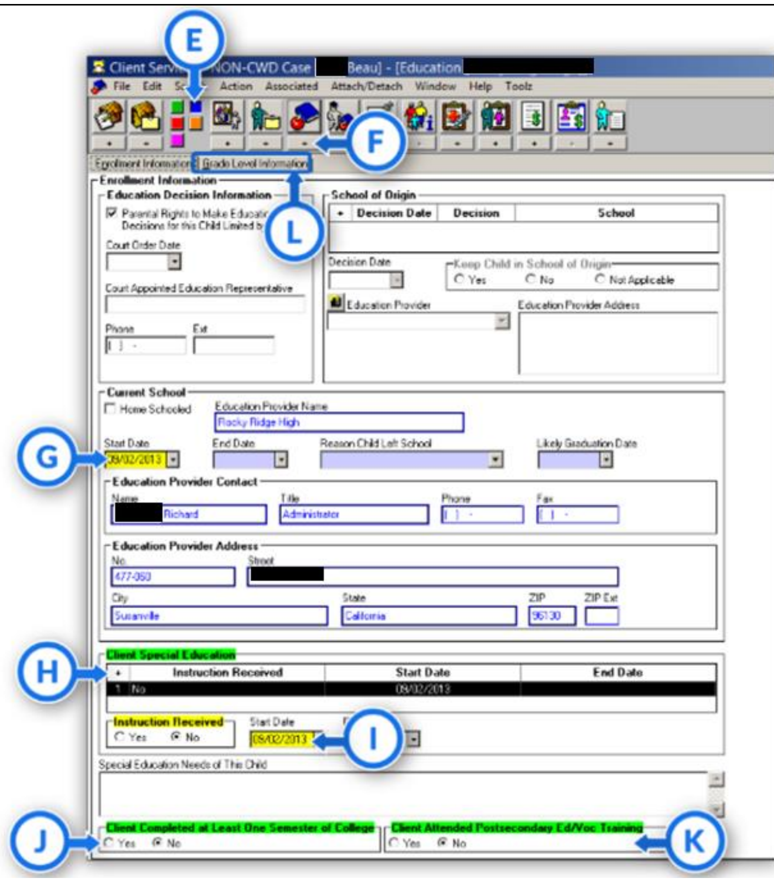
H. Click the plus under Special Education and enter either “Yes,” or “No” that the youth is or is not identified as special education.

I. Enter a special education start date (Note: the only time you would end date this field is if you were updating from not special education to special education or the opposite, otherwise do not end date.)

J. Click yes/no for “Client Completed at least One Semester of College.”

K. Click yes/no for “Client attended Postsecondary Ed/Voc Training.”

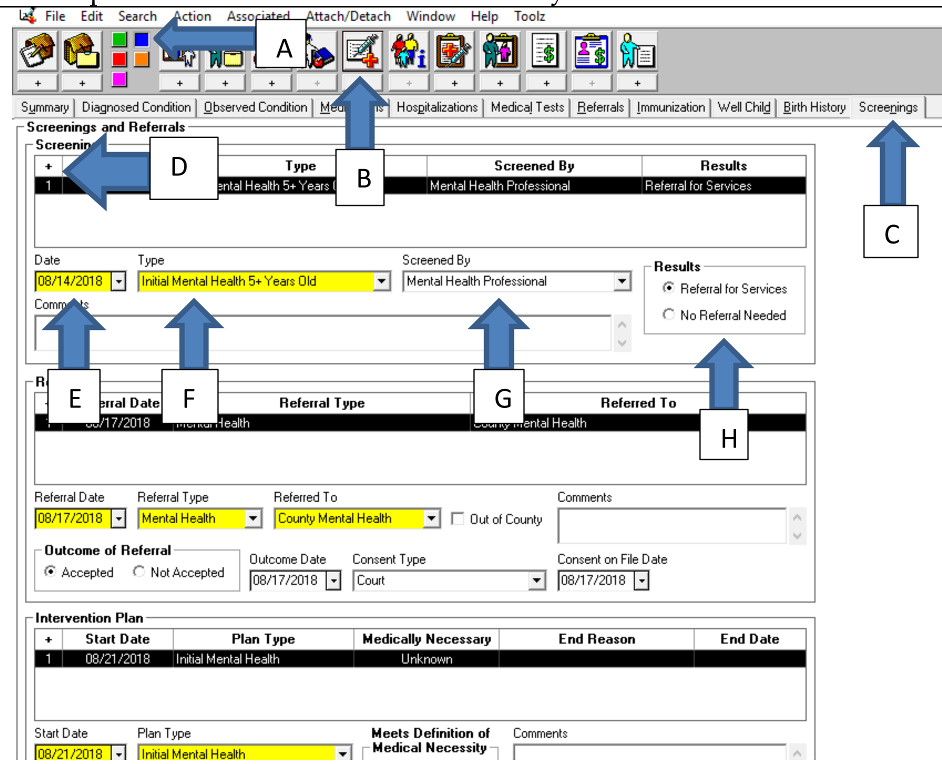
L. Click on the Grade Level Information tab and click the plus under Grade Level Information to activate the fields. Complete grade, start date, and grade level performance.
(Note: Before searching and adding a new school, open the existing education provider and enter an end date on the enrollment page. Proceed with step “A.”)



SAVE TO DATABASE

Documenting Developmental and Mental Health Screening, Referral, Intervention and Plan in CWS/CMS

Per ACL 15-11, Screenings are to be completed at intake and at least annually thereafter.



A. Click the blue Client Management button.

B. Click on the open existing health notebook for your youth (icon with the clipboard and red cross). A new window will open. Highlight your youth's name and click OK.

C. Click on the screenings page tab.

D. Click on the plus sign under screenings to activate the yellow fields.

E. Enter the date of the screening.

F. Enter the type of the screening from the drop-down menu (i.e. Initial Mental Health 5+ Years Old.)

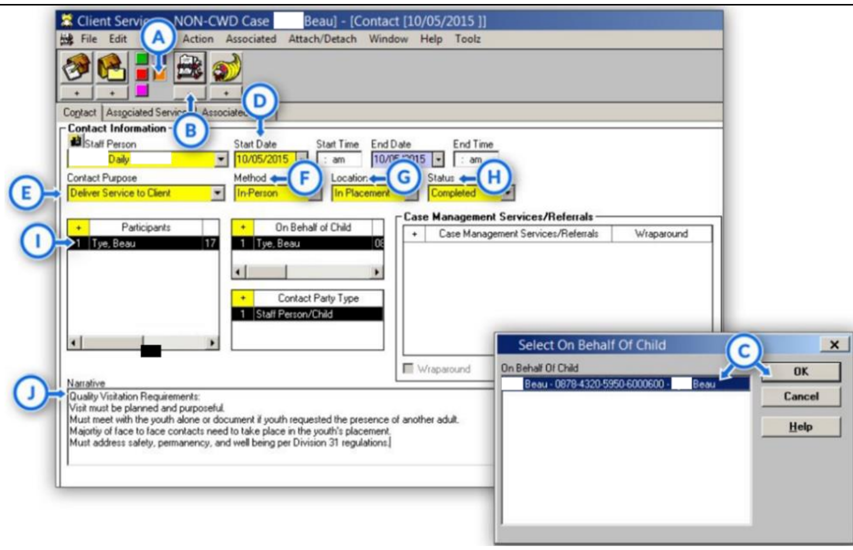
G. Enter the "Screened By" value from the drop-down menu (i.e. Staff, children's mental health.)

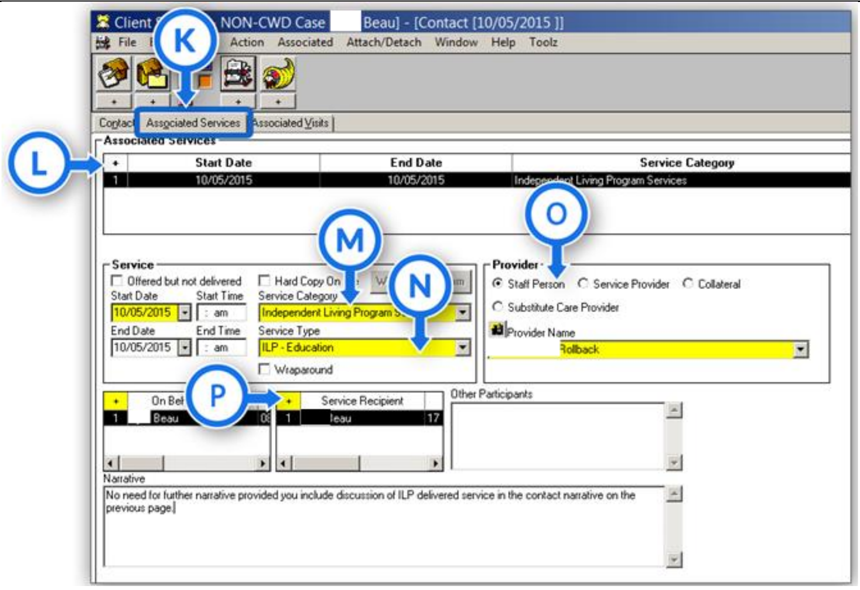
H. Click the radio button for *Referral for Services or *No Referral Needed.

(Note: Add any additional detail in the comments section and complete the ***Referral, Intervention and Plan Detail frames as applicable)***

SAVE TO DATABASE

Creating a Contact for a Youth and Documenting ILP Delivered Services

<table>
<tr><td>A. Click the orange Service Management button.</td><td rowspan="10">
</td></tr>
<tr><td>B. Click the plus under the rolodex icon.</td></tr>
<tr><td>C. A new window will appear with your youth's name. Highlight the youth's name and click "OK."</td></tr>
<tr><td>D. Enter the start date.</td></tr>
<tr><td>E. Select Contact Purpose "Deliver Service to Client."</td></tr>
<tr><td>F. Select Method of visit.</td></tr>
<tr><td>G. Select Location of visit if visit is in-person. Majority of visits must be in the youth's placement.</td></tr>
<tr><td>H. Select the Status of visit "Completed" to be compliant. AWOL youth and non-compliant extended foster care youth require documented monthly "Attempted" contacts.</td></tr>
<tr><td>I. Select the Participant(s) contacted during the visit.</td></tr>
<tr><td>J. Enter a detailed Narrative for your visit (see sample visit guidelines and be certain to include SB89 data per ACL 18-61). If youth is not ILP eligible, save to database here. If ILP eligible, continue to instruction K.</td></tr>
</table>

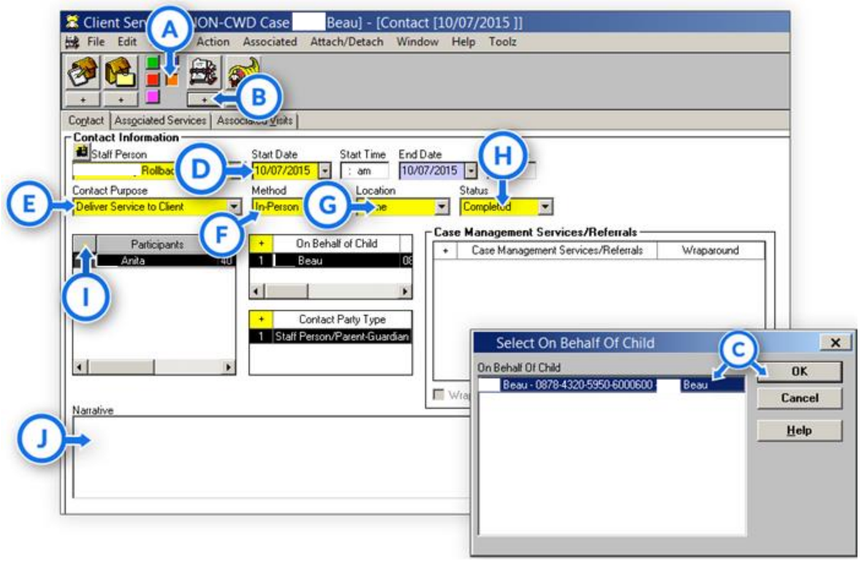
K. (Provided your youth is ILP eligible) Click on the "Associated Services" tab.	
L. Click the plus under Associated Services" to activate the fields on the page.	
M. Select the "Service Category" of "Independent Living Program Services."	
N. Select the "Service Type(s)" from the drop-down menu. (Service type should match the service discussed in your contact narrative).	
O. Select the type of Provider (i.e., Staff Person, Service Provider) and their name from the drop-down menu.	
P. Click the yellow plus sign in the "Service Recipient" box and choose your youth's name as the recipient.	

(Note: Provided you included discussion of the ILP delivered service in your narrative on the contact page, you do not need to add further narrative on the associated services page.)

SAVE TO DATABASE

Creating a Contact for a Parent

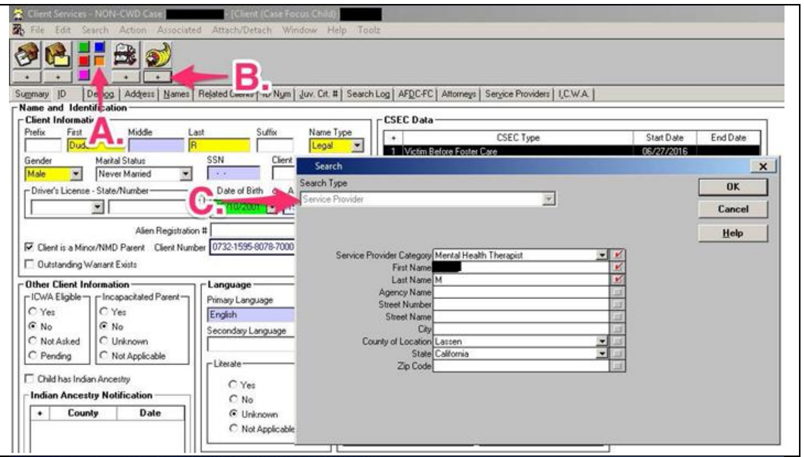
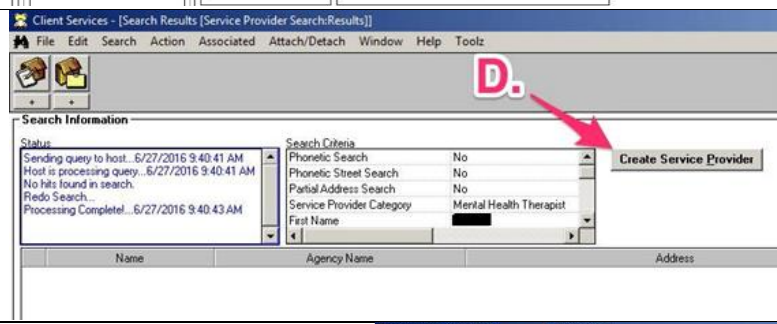
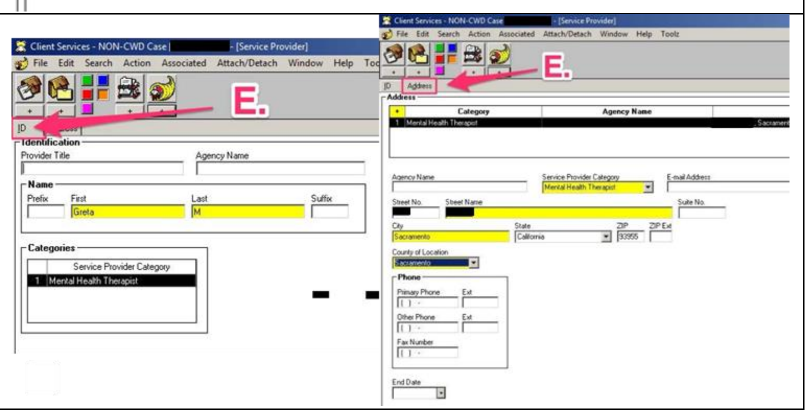
A.	Click the orange Service Management button.
B.	Click the plus under the rolodex icon
C.	A new window will appear with your youth's name. Highlight the youth's name and click "OK."
D.	Enter the start date.
E.	Select contact purpose "Deliver Service to Client.
F.	Select Method of visit.
G.	Select location of visit if method is in-person.
H.	Select the status of visit "Completed."
I.	Select the participant(s) contacted during the visit.
J.	Enter a detailed narrative for your visit.



SAVE TO DATABASE

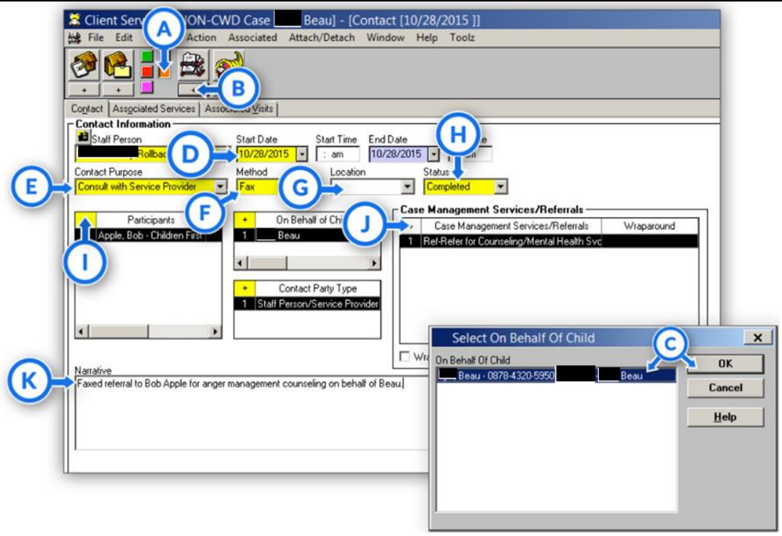
Searching for and Creating a Service Provider

Note: Perform a diligent search for a service provider prior to creating one. Try using different search criteria and make use of your wild card (%) to expand search results.

A. Click the orange Service Management button.	
B. Click the plus sign under the cornucopia notebook.	
C. Enter your search criteria in the open window and click OK.	
D. From the search results screen, click on the "Create Service Provider" button.	
E. A window opens with some of your search criteria already entered. Complete the ID and Address pages.	

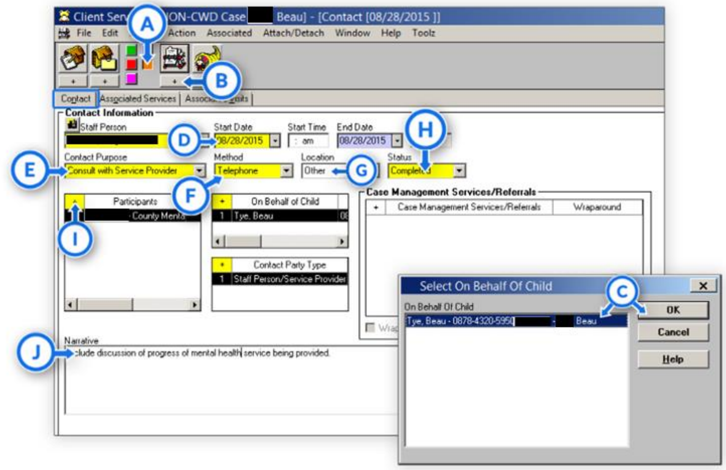
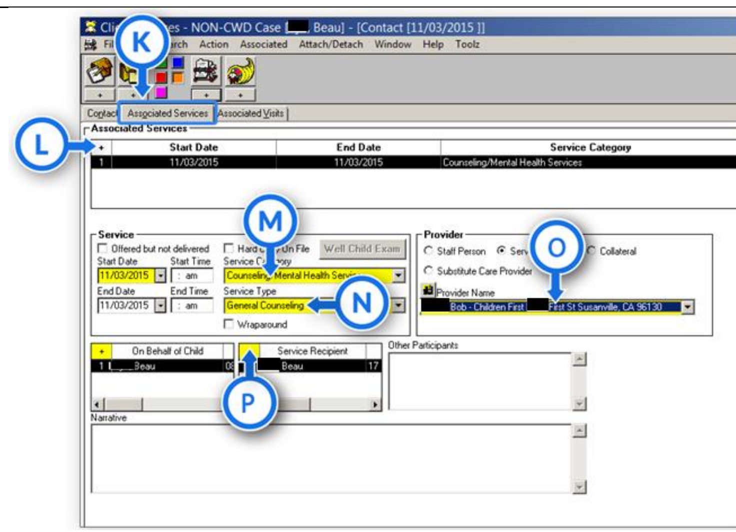
SAVE TO DATABASE

Documenting a Mental Health Referral

<table>
<tr><td>A. Click the orange Service Management button.</td><td rowspan="11">
</td></tr>
<tr><td>B. Click the plus under the rolodex icon</td></tr>
<tr><td>C. A new window will appear with your youth's name. Highlight the youth's name and click "OK."</td></tr>
<tr><td>D. Enter the start date</td></tr>
<tr><td>E. Select contact purpose "Consult with Service Provider"</td></tr>
<tr><td>F. Select Method (e.g. Fax)</td></tr>
<tr><td>G. Select location (e.g. Office)</td></tr>
<tr><td>H. Select the status of "Completed"</td></tr>
<tr><td>I. Select the participant as "Service Provider" and choose their name. If the service provider's name is not available, follow the instructions in this guide for searching for an existing service provider or creating a new service provider.</td></tr>
<tr><td>J. In the "Case Management Service Referral Window," click the plus sign and choose "Ref- Refer for Counseling Mental/ Health Services."</td></tr>
<tr><td>K. Enter a brief narrative about the purpose of the referral.</td></tr>
</table>

SAVE TO DATABASE

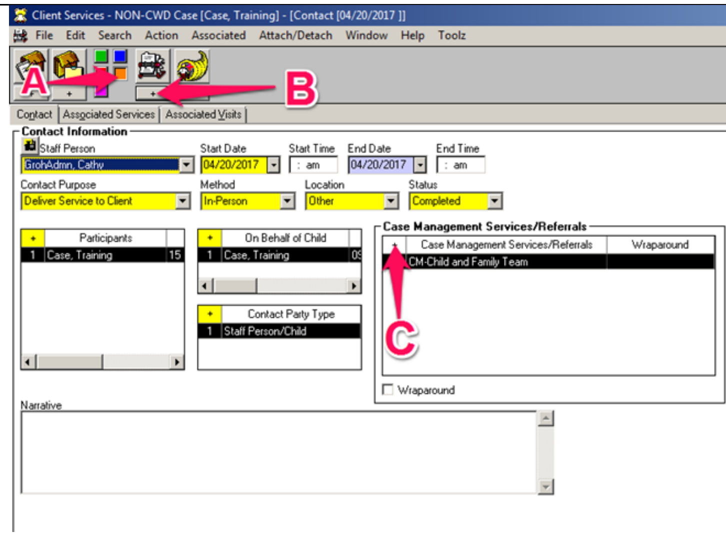
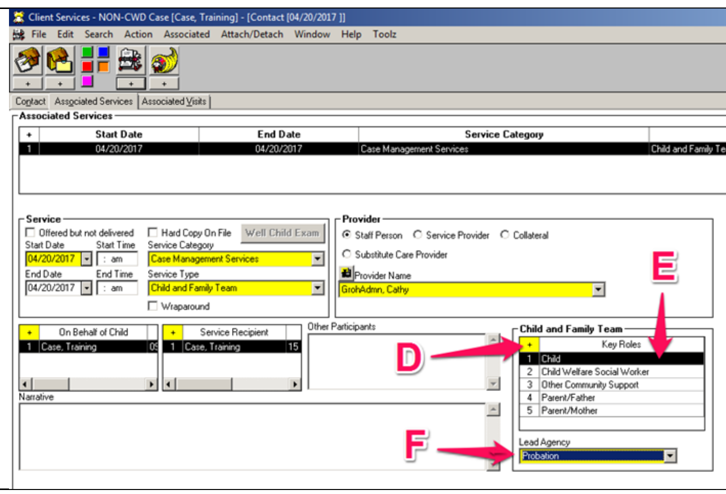
Documenting a Monthly Mental Health Contact and Delivered Service

A. Click the orange Service Management button.	
B. Click the plus under the rolodex icon.	
C. A new window will appear with your youth's name. Highlight the youth's name and click "OK."	
D. Enter the start date.	
E. Select contact purpose "Consult with Service Provider."	
F. Select Method of visit.	
G. Select location of visit if visit is in-person.	
H. Select the status of visit "Completed" to be in compliance.	
I. Select the participant as "Service Provider" and choose their name. If the service provider's name is not available, follow the instructions in this guide to search for an existing service provider or creating a new service provider.	
J. Enter a detailed narrative for your visit.	
K. Click on the "Associated Services" tab	
L. Click the plus under "Associated Services" to activate the fields on the page.	
M. Select the "Service Category" of "Counseling/Mental Health Services."	
N. Select the "Service Type(s)" of "General Counseling."	
O. Select "Service Provider" and their name from the drop-down menu.	
P. Click the yellow plus sign in the "Service Recipient" box and choose your youth's name as the recipient.	

(Note: Provided you included discussion of counseling services in your narrative on the contact page, you do not need to add further narrative on the associated services page.)

SAVE TO DATABASE

Documenting Children and Family Team Meetings (CFT)

<table>
<tr><td>A. Click on the orange Service Management button.</td><td rowspan="3">
</td></tr>
<tr><td>B. Click on the plus sign under the rolodex icon to create new contact and complete yellow mandatory fields as shown in the screenshot. Include summary of team meeting in the narrative field.</td></tr>
<tr><td>C. From the “Case Management Services/Referrals” window click the yellow plus sign and choose CM-Child and Family Team. This will auto fill your service category and service type on the associated services page.</td></tr>
<tr><td>D. Click on the Associated Services Page and click on the yellow plus sign under the window titled “Child and Family Team.”</td><td rowspan="3">
</td></tr>
<tr><td>E. From the dropdown menu choose key roles of the participants (note, you can choose multiple roles at once.)</td></tr>
<tr><td>F. Choose “Lead Agency” from the yellow dropdown menu.</td></tr>
</table>

(Note: Document CFT info in your case plan)

SAVE TO DATABASE

Annual Reassessment of Youth in Group Home Care

Per ACIN I-43-15 dated June 26, 2015 - Documentation of Annual Reassessments to Determine the Appropriateness of Continued Group Home Care for Youth in Group Homes over one Year and Plans for Transitioning into a Family- Based Setting.

A. Click on the orange Service Management button.

B. Click on the plus sign under the rolodex icon notebook to create new contact on behalf of youth.

C. Enter the start date.

D. Enter Contact Purpose of "Conduct Client Evaluation."

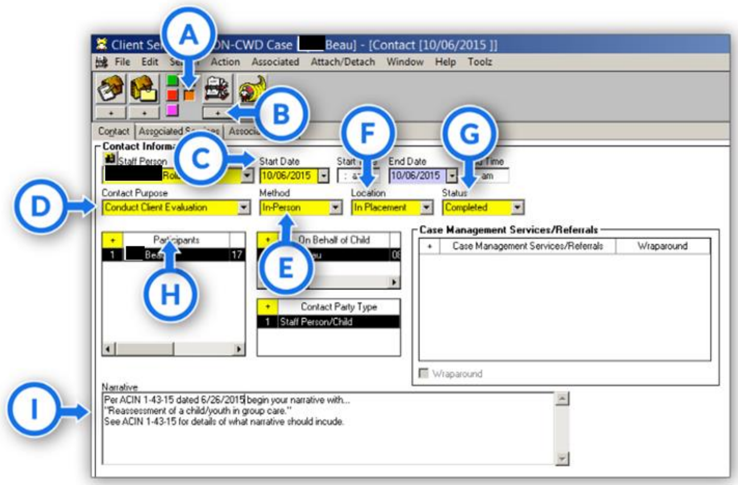
E. Enter Method "In Person."

F. Enter location "In Placement."

G. Enter Status "Completed."

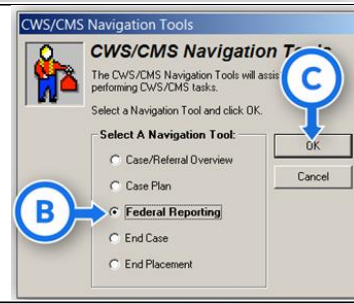
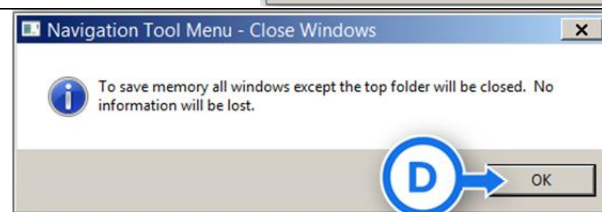
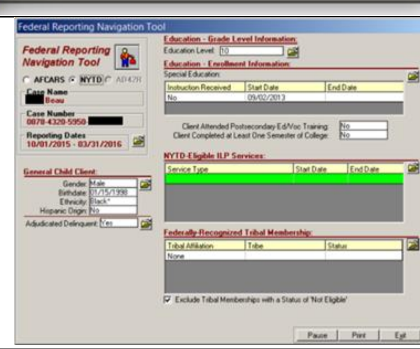
H. Participant = Your Youth.

I. Begin Narrative with "Reassessment of a child/youth in group care" and refer to ACIN I-43-15 for additional narrative requirements.



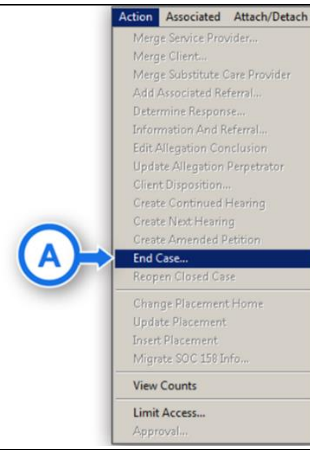
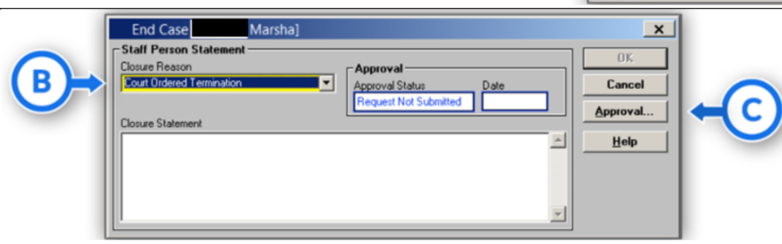
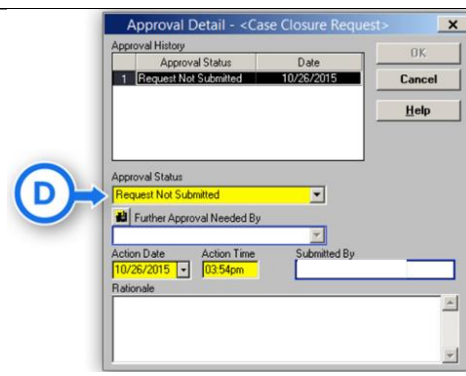
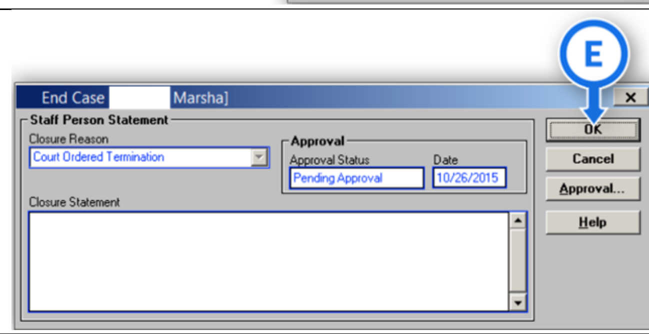
SAVE TO DATABASE

Federal Reporting – NYTD

<table>
<tr><td>A. Click on the Tool Man icon.</td><td>
</td></tr>
<tr><td>B. Click Federal Reporting.</td><td rowspan="2">
</td></tr>
<tr><td>C. Click "Ok."</td></tr>
<tr><td>D. A window appears informing you that "To save memory all windows except the top folder will be closed. No information will be lost. Click "OK."</td><td>
</td></tr>
<tr><td>E. Click on NYTD</td><td rowspan="2">
</td></tr>
<tr><td>F. Click on "This Case" (only available from the open case otherwise it will show "For Another Case?")</td></tr>
<tr><td>G. A window will appear with the statement "All Contacts for the current reporting period may not be in cache. Would you like to check Contact history? Click "Yes."</td><td>
</td></tr>
<tr><td>Note: Check to see that your Federal Reporting Requirements are up to date by assuring no green fields are active; they should not be active. Use the manila file folders next to each field to access the training tool to assist you with fixing any active green fields. (Exception – minors not yet ILP eligible. This field will remain green until you enter a delivered service upon eligibility at age 14) Upon completion exit the tool and if you have made any changes save to database.</td><td></td></tr>
</table>

Closing a CWS/CMS Case

(Note: Cases are opened in the system based on the date placement is ordered by the court. Cases are closed in CWS/CMS when placement orders are set aside or vacated.)

<table>
<tr><td>A. From the open case click on the "Action" drop-down menu and choose "End Case."</td><td>
</td></tr>
<tr><td>B. Provided all case reminders have been cleared, a window will open for you to choose a closure reason from the drop-down menu. (If you are adding a closure statement, do so before clicking on the approval button).</td><td rowspan="2">
</td></tr>
<tr><td>C. Click the approval button.</td></tr>
<tr><td>D. On the next screen in the yellow field where it's noted "request not submitted," change to "pending approval," and enter the "action date" of request.</td><td>
</td></tr>
<tr><td>E. A window will appear that will show the pending approval status, then click "OK."</td><td>
</td></tr>
</table>

(SAVE TO DATABASE)