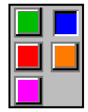
PERFORM CLIENT SEARCH

1. Click the **Search** drop-down menu.
2. Select **Start Search**.
3. Enter the search criteria.
4. Click **OK.**
5. Double click to open the client's abstract.
6. Click **Yes.**
7. Verify that this is the correct client.
8. Click the **Window** drop-down menu.
9. Click on the Non-CWD case to bring your open case back into view.

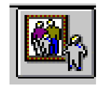
ATTACHING CLIENTS

10. Click the **Attach/Detach** drop-down menu.
11. Select **Attach Existing Client**.
12. Select the client(s) to attach in the **Attach this Client** grid.
13. Click **OK.**
14. Use the **Open Existing Client** notebook to open the client notebooks you have attached and update information such as updating the client address and proper client relationships on the **Related Clients** page.

CREATE CLIENT NOTEBOOK



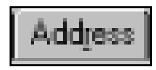
1. Click the **Client Management Section** (**blue** button).



(If the client is not located after completing a client search.)

2. Click the **"+"** under the **Client** notebook.

Complete all mandatory (**yellow**) and known **fields** on the **ID** page



1. Click the **Address** page and copy common address, if applicable, and verify the address and address type.

2. Click the **Related Clients** page tab.
3. Complete all mandatory (**yellow**) and known **fields**.

Create a Client Notebook

When a thorough database search fails to locate a client(s), use the Create New Client notebook to create a Client notebook. Although it is important to complete all pages in the Client notebook, this section will focus on the two most important pages in this process.

1. To create a Client notebook, (A) click the Client Management Section (blue button), and (B) click the Create New Client notebook.

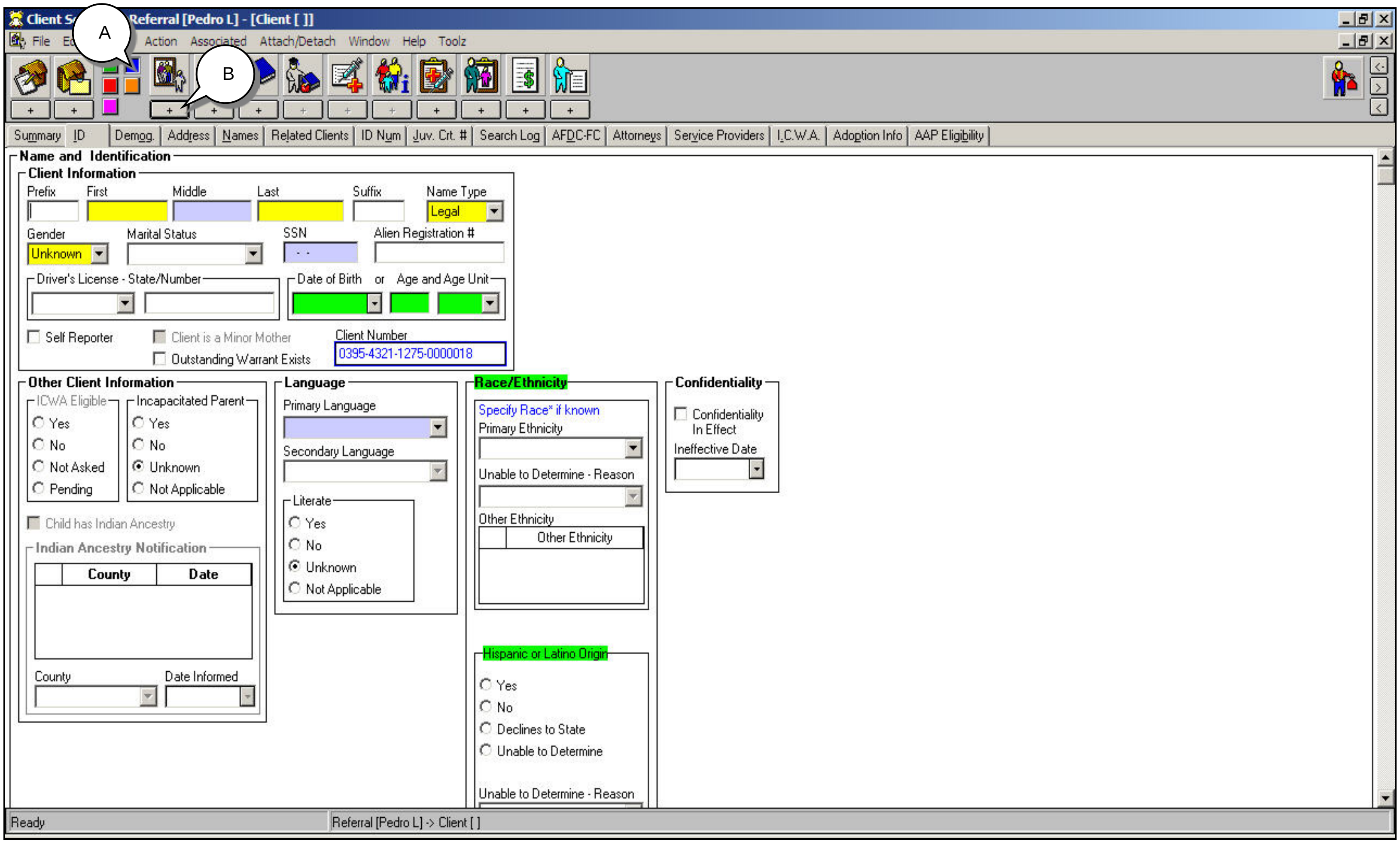


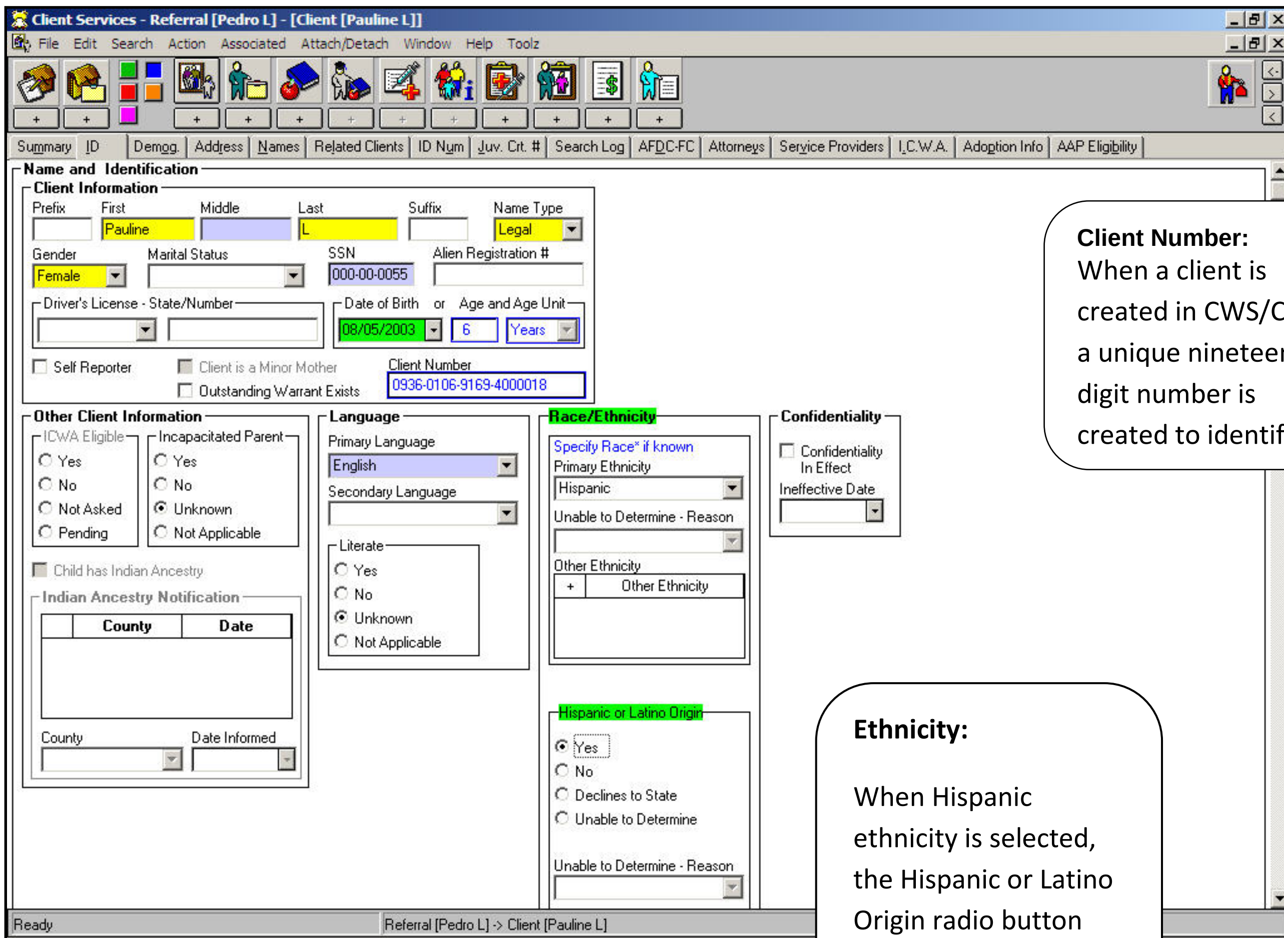
Figure – RIC 007

Create a Client Notebook (continued)

The Identification (ID) Page

Use this page to enter specific client information, such as name, date of birth, social security number, language, race/ethnicity, and Hispanic or Latino origin.

1. Complete all mandatory and known fields on this page.



Client Number:
When a client is created in CWS/CMS, a unique nineteen-digit number is created to identify

Ethnicity:

When Hispanic ethnicity is selected, the Hispanic or Latino Origin radio button must be in synch. If it is not, the red label

Figure – RIC 008

Create a Client Notebook (continued)

The Address Page

Use this page to enter address information, including the type of address being recorded and if the child is currently AWOL or abducted.

2. You can use the (A) Copy Common Address button to copy the common address from the Referral ID page. Once you have copied the address into the grid, you can edit the information. You can also click on the “+” sign to create a new address.

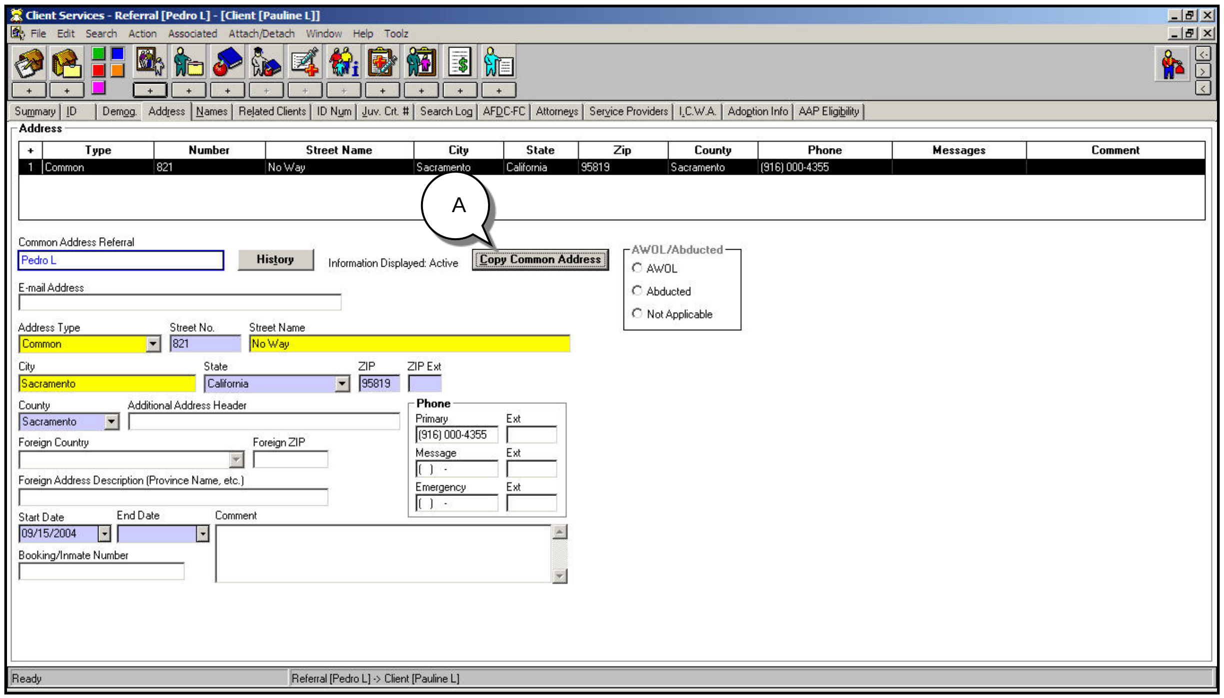


Figure – RIC 009

Copy Common Address:
The Copy Common Address button can be used to copy a referral common address to an individual client’s notebook. Multiple active common addresses will be allowed. The start date for

AWOL/Abducted:
The AWOL/Abducted frame contains buttons that indicate the AWOL or

Create a Client Notebook (continued)

3. You will need to make sure that you (B) change “Common” as the Address Type to the appropriate type, i.e., “Residence”. Any addresses with a type of “Common” will automatically be end dated when the referral is closed.

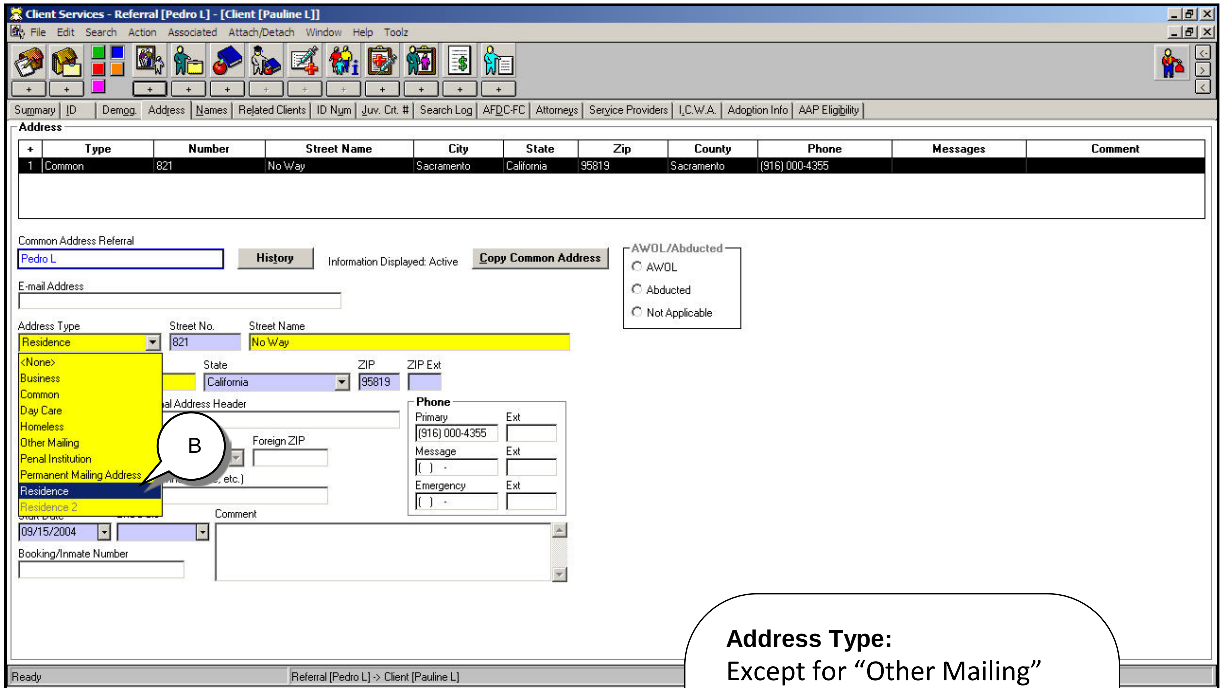


Figure – RIC 010

Address Type:
Except for “Other Mailing” and “Common” address types, only one address for each type can exist at the same time. The address types of “Residence”, “Homeless”, and “Penal Institution” are mutually exclusive and cannot be active at the same time.

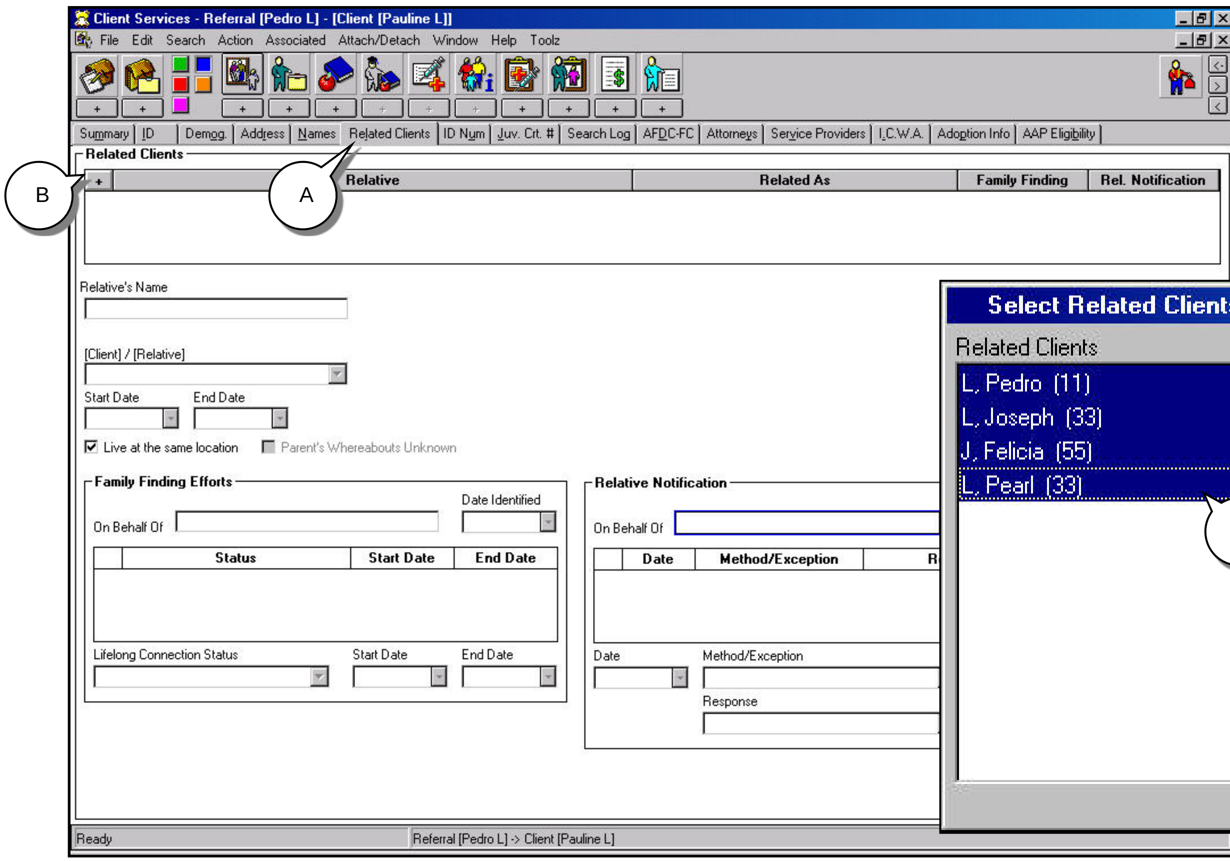
Common Address:
An address type of Common will only populate to the Suspected Child Abuse Report (SS8572), the Child Abuse Form (SS8583), Notice of Hearing on Petition, Notice of Hearing on Selection of Permanent Plan, Notice of Child Custody Proceeding for Indian Child, ICWA-030, and the Notice of Review Hearing. Without changing the address type to “Residence”, the address will not be found in an address search. Also, any addresses with a type of “Common” will automatically be end dated when the referral is closed.

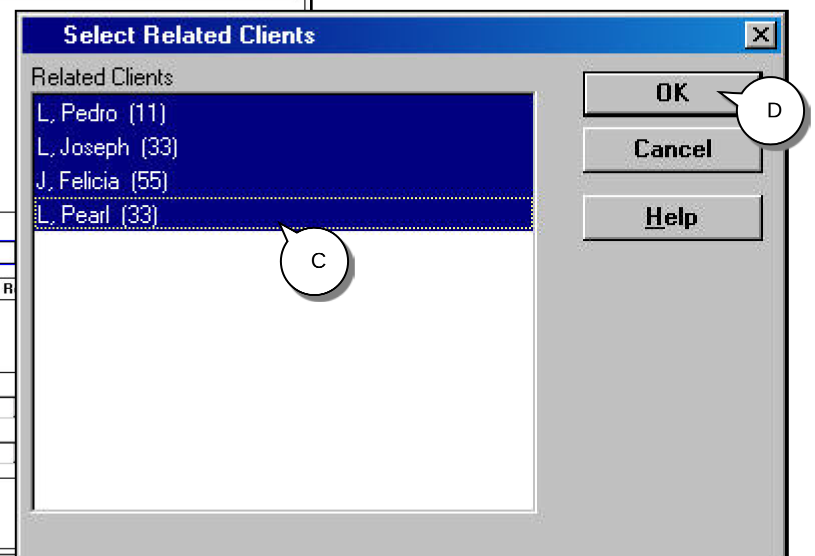
Create a Client Notebook (continued)

The Related Clients Page

Use this page to identify all clients related to the client created for this referral.

4. To complete the Related Clients page, (A) click the Related Clients page tab, (B) click the "+" in the Related Clients grid, (C) select all clients related to the new client, and (D) click the OK button.





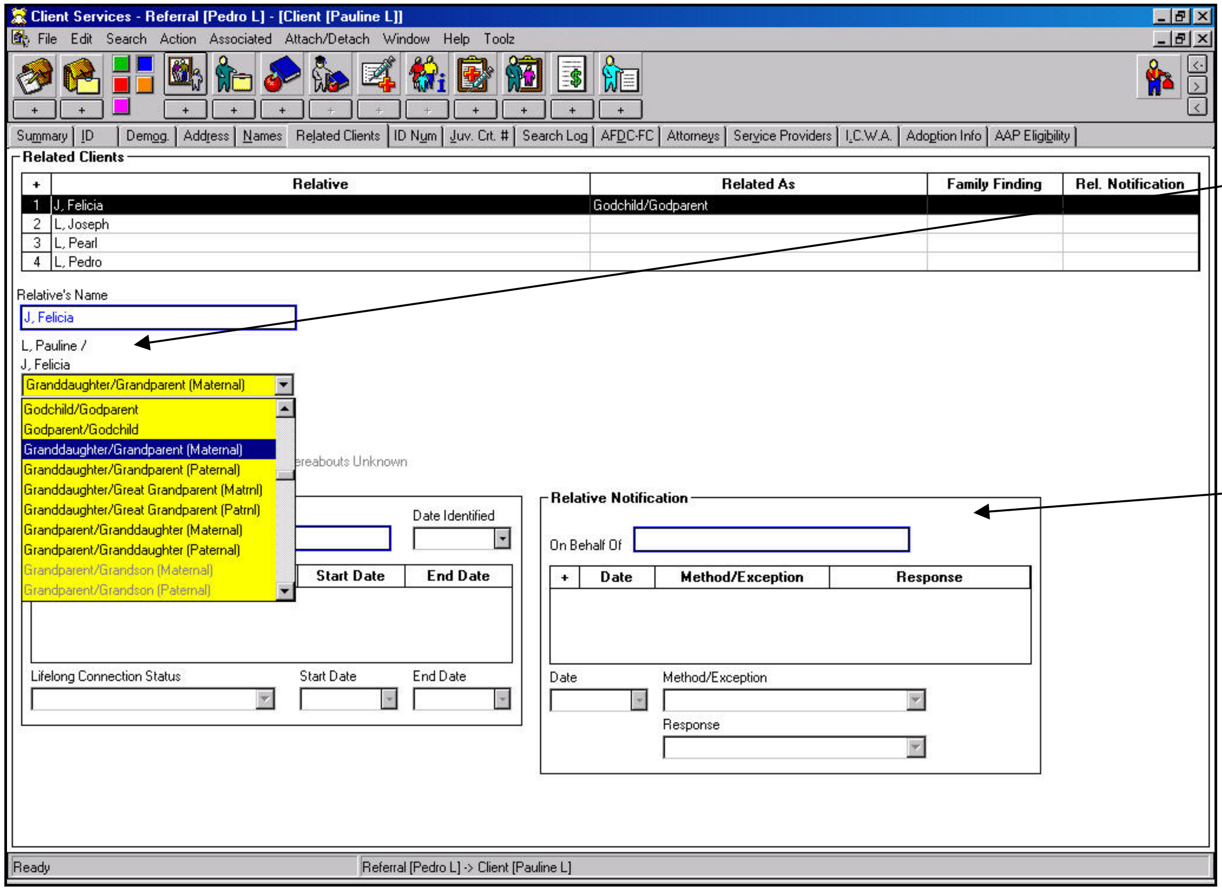
Family Finding Efforts: Document the Lifelong Connection Status of who is important in a child's life, including start and end dates.

Figure – RIC 011

Figure – RIC 012

Create a Client Notebook (continued)

5. Use the drop-down list to relate the clients listed in the Related Clients grid. Select each row in succession to establish all relationships for this client.



Client Relationships: These client relationships populate into Court Report and Case Plan documents.

Relative Notification: Document the Relative Notification information including date, method/exception, and response. File, print report to produce the Relative/Notification letter. This same functionality is also available in the collateral notebook.