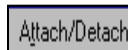


PERFORM CLIENT SEARCH



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).



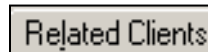
(If the client is not located after completing a client search.)

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.

The screenshot shows the 'Client Management' software interface. The title bar reads 'Client Management - Referral [Pedro L] - [Client []]'. The menu bar includes 'File', 'Edit', 'Action', 'Associated', 'Attach/Detach', 'Window', 'Help', and 'Tools'. The toolbar contains various icons, with callout A pointing to the 'Client Management' button (a blue button with a person icon) and callout B pointing to the 'Create New Client' button (a blue button with a plus icon). Below the toolbar is a tabbed interface with tabs for 'Summary', 'ID', 'Demog', 'Address', 'Names', 'Related Clients', 'ID Num', 'Juv. Cr. #', 'Search Log', 'AFDC-FC', 'Attorneys', 'Service Providers', 'I.C.W.A.', 'Adoption Info', and 'AAP Eligibility'. The 'Summary' tab is active, displaying the 'Name and Identification' section. This section includes fields for 'Prefix', 'First', 'Middle', 'Last', 'Suffix', and 'Name Type' (set to 'Legal'). It also has fields for 'Gender' (set to 'Unknown'), 'Marital Status', 'SSN', and 'Alien Registration #'. There are checkboxes for 'Self Reporter', 'Client is a Minor Mother', and 'Outstanding Warrant Exists'. The 'Client Number' field is populated with '0395-4321-1275-0000018'. Below this is the 'Other Client Information' section, which includes radio buttons for 'ICWA Eligible' (Yes, No, Not Asked, Pending) and 'Incapacitated Parent' (Yes, No, Unknown, Not Applicable). There is also a checkbox for 'Child has Indian Ancestry' and a table for 'Indian Ancestry Notification' with columns for 'County' and 'Date'. The 'Language' section has fields for 'Primary Language' and 'Secondary Language', and radio buttons for 'Literate' (Yes, No, Unknown, Not Applicable). The 'Race/Ethnicity' section has a dropdown for 'Specify Race* if known', a dropdown for 'Primary Ethnicity', and a dropdown for 'Other Ethnicity'. The 'Confidentiality' section has a checkbox for 'Confidentiality In Effect' and a dropdown for 'Ineffective Date'. The status bar at the bottom reads 'Ready' and 'Referral [Pedro L] -> Client []'.

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 Services - Referral [Pedro L] - [Client [Pauline L]]

File Edit Search Action Associated Attach/Detach Window Help Toolz

Summary ID Demog. Address Names Related Clients ID Num Juv. Cr. # Search Log AFDC-FC Attorneys Service Providers I.C.W.A. Adoption Info AAP Eligibility

Name and Identification

Client Information

Prefix First Middle Last Suffix Name Type
Pauline L Legal

Gender Marital Status SSN Alien Registration #
Female [] 000-00-0055 []

Driver's License - State/Number Date of Birth or Age and Age Unit
[] [09/05/2003] 6 Years

☐ Self Reporter ☐ Client is a Minor Mother ☐ Outstanding Warrant Exists Client Number
0936-0106-9169-4000018

Other Client Information

ICWA Eligible Incapacitated Parent
☐ Yes ☐ Yes
☐ No ☐ No
☐ Not Asked ☐ Unknown
☐ Pending ☐ Not Applicable

☐ Child has Indian Ancestry

Indian Ancestry Notification

County	Date

County Date Informed
[] []

Language

Primary Language
English

Secondary Language
[]

Literate
☐ Yes
☐ No
☒ Unknown
☐ Not Applicable

Race/Ethnicity

Specify Race* if known

Primary Ethnicity
Hispanic

Unable to Determine - Reason
[]

Other Ethnicity
+ Other Ethnicity

Confidentiality

☐ Confidentiality In Effect
Ineffective Date
[]

Hispanic or Latino Origin

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

Unable to Determine - Reason
[]

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.

- 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.

The screenshot shows a software window titled "Client Services - Referral [Pedro L] - [Client [Pauline L]]". The "Address" tab is selected. A table lists address entries. Below the table is a form for editing address details. A callout bubble labeled 'A' points to the "Copy Common Address" button.

	Type	Number	Street Name	City	State	Zip	County	Phone	Messages	Comment
1	Common	821	No Way	Sacramento	California	95819	Sacramento	(916) 000-4355		

Common Address Referral: Information Displayed: Active

Address Type: Street No.: Street Name:

City: State: ZIP: ZIP Ext:

County: Additional Address Header:

Foreign Country: Foreign ZIP:

Foreign Address Description (Province Name, etc.):

Start Date: End Date: Comment:

Booking/Inmate Number:

Phone: Primary Ext:
Message Ext:
Emergency Ext:

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

Figure – RIC 009

AWOL/Abducted:

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

Create a Client Notebook (continued)

- 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.

Type	Number	Street Name	City	State	Zip	County	Phone	Messages	Comment
Common	821	No Way	Sacramento	California	95819	Sacramento	(916) 000-4355		

Common Address Referral
Pedro L. History Information Displayed: Active Copy Common Address

E-mail Address:

Address Type: <None> Business Common Day Care Homeless Other Mailing Penal Institution Permanent Mailing Address Residence Residence 2

Street No.: 821 Street Name: No Way

State: California ZIP: 95819 ZIP Ext:

Phone: (916) 000-4355

Date: 03/15/2004

Figure – RIC 010

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.

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.

Create a Client Notebook (continued)

The Related Clients Page

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

- 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.

Client Services - Referral [Pedro L.] - [Client [Pauline L.]]

File Edit Search Action Associated Attach/Detach Window Help Tools

Summary ID Demog Address Names Related Clients ID Num Juv. Cr. # Search Log AFDC-FC Attorneys Service Providers L.C.W.A. Adoption Info AAP Eligibility

Related Clients

Relative

Related As

Family Finding

Rel. Notification

Relative's Name

[Client] / [Relative]

Start Date End Date

☒ Live at the same location ☐ Parent's Whereabouts Unknown

Family Finding Efforts

On Behalf Of Date Identified

Status	Start Date	End Date

Lifelong Connection Status Start Date End Date

Relative Notification

On Behalf Of

Date	Method/Exception	R

Date Method/Exception

Response

Figure – RIC 011

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

Select Related Clients

Related Clients

- L. Pedro (11)
- L. Joseph (33)
- J. Felicia (55)
- L. Pearl (33)

OK

Cancel

Help

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.

The screenshot shows the 'Client Services - Referral [Pedro L] - [Client [Pauline L]]' window. The 'Related Clients' grid is visible, showing a list of relatives. The 'Relative's Name' dropdown is open, showing a list of relationships. The 'Relative Notification' form is also visible, showing fields for 'On Behalf Of', 'Date', 'Method/Exception', and 'Response'.

Relative	Related As	Family Finding	Rel. Notification
1 J. Felicia	Godchild/Godparent		
2 L. Joseph			
3 L. Pearl			
4 L. Pedro			

Relative's Name: J. Felicia

Relationships:

- Granddaughter/Grandparent (Maternal)
- Godchild/Godparent
- Godparent/Godchild
- Granddaughter/Grandparent (Paternal)
- Granddaughter/Great Grandparent (Matrnl)
- Granddaughter/Great Grandparent (Patrnl)
- Grandparent/Granddaughter (Maternal)
- Grandparent/Granddaughter (Paternal)
- Grandparent/Grandson (Maternal)
- Grandparent/Grandson (Paternal)

Start Date: [] End Date: []

Lifelong Connection Status: [] Start Date: [] End Date: []

Relative Notification

On Behalf Of: []

+	Date	Method/Exception	Response

Date: [] Method/Exception: [] Response: []

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.