



# CWS/CMS (Health/Ed)

Health and Education Notebooks

## Process Map

## Process Map Overview

You will be using the Scenario Manager (SM) application along with the New User Curriculum for completing your Skill Building Exercises. Please be advised that SM is a stand-alone application i.e., it uses client information specific to each exercise that is stored on your hard drive. You are not connected to a network and therefore do not access the database. While every effort has been made to have SM appear and operate just as the Child Welfare Services/Case Management System (CWS/CMS) application does, SM is limited in scope to the particular exercise you are doing. Any reference to the Database (e.g. Save to Database or doing a Client Search) only involves data stored on your workstation intended to support the SM application.

This Process Map guides you through New User Curriculum Skill Building Exercises. Use this Process Map as a guide when you are working in the SM application. These maps can also be used as reference for the live application. Please check your county policies for processes that may differ.

In this Scenario you will complete the following:

- Open Scenario Manager (SM) software and the corresponding scenario package
- Open the existing Case (or Referral) to record
- Use the Health notebook located in the Client Management Section of either the Referral or Case Folder in focus, to record and view health-related information for a client
- Use the Education notebook, located in the Client Management Section of either the Referral or Case Folder in focus, to record and view education information for a child client
- Generate the Health and Education Passport

## OPEN CLIENT SERVICES



1. Click the **Client Services** application.



2. Click the **Open Existing Case Folder** button.
3. Use the **Open Folder** dialog box to select the **Case** you want to open.
4. Click **OK**.

## HEALTH NOTEBOOK



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



6. Click on the **Open Existing Health** notebook.

7. Select the **client**.

8. Click **OK**.



9. Click the **Summary** page tab.
10. Complete all known and mandatory **fields, including any Dual-Agency Services**.
11. Click the **Diagnosed Condition** page tab.
12. Click the “+” sign in the grid.
13. Complete all known and mandatory (**yellow**) **fields**.



14. Click the **Observed Condition** page tab.
15. Click the “+” sign in the grid.
16. Complete all known and mandatory (**yellow**) **fields**.
17. Click the **Medications** page tab.
18. Click the “+” sign in the grid.
19. Click the **client condition**.
20. Click **OK**.
21. Complete all known and mandatory **fields**.

## Hospitalizations Medical Tests

22. Click the **Hospitalizations** page tab.
23. Click the “+” sign in the grid.
24. Click the **client condition**.
25. Click **OK**.
26. Complete all known and mandatory **fields**.
27. Click the **Medical Tests** page tab.
28. Click the “+” sign in the grid.
29. Click the **client condition**.
30. Click **OK**.
31. Complete all known and mandatory **fields**.



32. Click the **Referrals** page tab.
33. Click the “+” sign in the grid.
34. Click the **client condition**.
35. Click **OK**.
36. Complete all known and mandatory **fields**.

Immunization

37. Click the **Immunization** page tab.
38. Click the “+” in the **Immunization** grid.
39. Complete all known and mandatory **fields**.

Birth History

40. Click the **Birth History** page tab.
41. Complete all known and mandatory **fields**.

Screenings

42. Click the **Screenings** page tab.
43. Complete all known and mandatory **fields**.

SEARCH FOR EDUCATION PROVIDER

Search Action As  
Start Search...

44. Click the **Search** drop-down menu.
45. Select **Start Search**.
46. Click the **Search Type** drop-down list.
47. Select **Education Provider**

48. Enter the **School Category** and **Zip Code** of the school.

49. Click **OK**.

50. Close the **Search Results** window.

CREATE EDUCATION NOTEBOOK



51. Click the “+” under the **Open Existing Education** notebook.
52. Select the child's **school**.
53. Click **OK**.

Enrollment Information Grade Level Information

54. Complete all mandatory and known fields on the **Enrollment Information** page.
55. Click the **Grade Level Information** page tab.
56. Click the “+” in the grid.
57. Complete all mandatory and known **fields**.

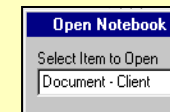
CREATE HEP DOCUMENT



58. Click the **Open Existing Document-Client** notebook.

59. Click the **Remove** button (if the dialog box is empty, skip to step 59).

60. Click **Yes**.



61. Click **New** in the **Open Notebook** dialog box.
62. Select **Health and Education Passport**.
63. Click **OK**.
64. Select the **client**.
65. Click **OK**.
66. Select the applicable filter **option** buttons.
67. Click **OK**.
68. To print the Health and Education Passport document, click the **Printer** icon.
69. **Close** the document and **minimize Microsoft Word**.

**- In Production Only -**

SAVE TO DATABASE



70. Click the **File** drop-down menu.
71. Select **Save to Database**.
72. Click **Exit CWS/CMS**.