CWS/CMS (Health/Ed)

Entering the CHDP Medical and Dental Exams
Creating and Associating Service Providers to Clients
Updating the HEP

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.
- Entering CHDP Medical and Dental Exams.
- Creating and Associating Service Providers.
- Updating the Health and Education Passport.

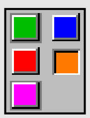
Scenario Manager File: [M03_S01] – Health and Education Passport (Part 1).arc

OPEN CLIENT SERVICES

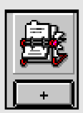
1. Click the **Client Services** application.

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

CREATE A CONTACT PAGE



5. Click the **Service Management Section** (orange button).



6. Click the **"+"** under the **Open Existing Contact** notebook.
7. Select the **child** for whom this contact is on the behalf of.
8. Click **OK.**

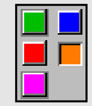
9. Complete all known and mandatory (yellow) **fields** on the **Contact** page.
10. Click the **Associated Services** page.
11. Click the **"+"** in the **Associated Services** grid.
12. Fill out all mandatory (yellow) and known **fields.**

SEARCH FOR SERVICE PROVIDER

13. If the service provider is not listed in the drop-down box, click the **Search** (binoculars) icon.
14. To search for the service provider, enter the **last name** or **agency name** of the Service Provider.
15. Click **OK.**
16. Check the drop-down list again. If the service provider appears, select the service provider.

If the service provider cannot be found after a thorough search, complete the steps in the next section.

CREATE A SERVICE PROVIDER NOTEBOOK



17. Click the **Service Management Section** (orange button).

18. Click the **"+"** to create **New Service Provider** notebook and search or Create Service Provider from Search Results page.
19. Complete all mandatory (yellow) and known **fields** on the **ID** and **Address** pages.
20. Double click the **Close Window** icon in the upper left corner or click the lower **X** in the upper right hand corner.

Return to the Associated Services page to select the service provider.

21. Select the service provider you just created from the drop-down listing.
22. Click the  button on the **Associated Services** page.

23. Click **OK.**

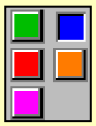
Scenario Manager File: [M03_S01] – Health and Education Passport (Part 1).arc

24. Complete all known information in the **Well Child Exam** dialog box.

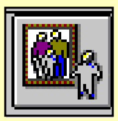
25. Click **OK.**

*Go to the **Service Provider** page in the **Client notebook** to create the association.*

ASSOCIATING THE SERVICE PROVIDER



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



27. Click the **Open Existing Client** notebook.

28. Select the **Client notebook(s)** you want to open.

29. Click **OK**.

30. Click the **Service Providers** page tab.

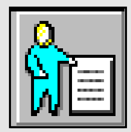
31. Click the **"+"** in the **Service Provider** grid.

32. The needed **Service Provider** should appear; select the service provider**.**

33. Enter the date the client's association with the service provider began into the **Start Date** field.

34. Complete all mandatory (yellow) and known **fields**.

CREATE THE HEP



35. Click the **Open Existing Document – Client** notebook.

36. Click the **Remove** button to remove the previous HEP document (if necessary).

37. Click the **Yes** button in the **Open Notebook** dialog box.

38. Click the **New** button.

39. Select **Health and Education Passport**.

40. From the **Filter Health and Education Passport Information** dialog box select the applicable filter **option** buttons.

41. Review the document for accuracy.

42. Click the **File** drop-down menu.

43. Click **Print**.

44. **Save** and **close** the document and **minimize Microsoft Word**.

SAVE TO DATABASE

45. Click the **File** drop-down menu.

46. Select **Save to Database**.

47. Click **Exit CWS/CMS**.