CWS/CMS for Supervisors

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CWS/CMS
Supervisor Functions
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Review Items that are Waiting for Approval

FROM THE CONTROL PANEL: ⇒ **CLICK ON CASELOAD** ⇐ ⇒ **CLICK ON SUPERVISOR** ⇐ 〔Requested Actions〕	On this page, you will be able to view all the items that have been sent to you that need to be approved. These are the **Mandatory** Approvals: ▪ Referral Response for an Evaluate Out Referral ▪ Client Disposition – Referral ▪ Case Plan ▪ End Case These are the Optional Approvals – Check with your county for specific policy: ▪ Placement ▪ Ongoing Payment Requests ▪ Incidental Payment Requests ▪ Shelter Care Extensions ▪ Court Reports ▪ Referral Response for other than Evaluate Out Referrals ▪ Case Transfer Requests **You cannot open the case or referral from this page – you can review the requested actions only.**

APPROVALS
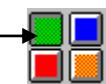
You must have the Case or Referral open in order to approve an action.

Referral Response	**ACTION Menu – Determine Response Command**
Client Disposition	**ACTION Menu – Client Disposition Command**
End Case	**ACTION Menu – End Case Command**
All Others:	**ACTION Menu – Approval Command**

Note: The item you want to approve must be in focus, ie., if you want to approve the Case Plan, it must open and in focus.

SAVE TO DATABASE

Assigning/Reassigning a Caseload to a Worker

|	
Open Resource Management ←	
Open Existing Office → ←	Open the office or offices that contain the worker's you will be reassigning the caseload from and to.
ACTION **Reassign Caseload** SAVE TO DATABASE	Under the **ACTION** menu – use the '**Reassign Caseload'** command. A dialog box will appear: you will select the office, staff person who is currently assigned the caseload, and the caseload name. Then select office and staff person who you want to reassign the caseload to – and click **ADD**.

Reopen A Closed Case

- You must be the supervisor of the worker who was last assigned to the case   **OR**
- Have County Administrator Authority
- You can only reopen your own county's closed cases.

Open the Case – it will be 'BLUE'. [green/blue/red/orange/magenta icon] Assignment	**Click on the HISTORY button to bring all assignments to the page.** **ACTION** **Reopen Closed Case** **Note:** The narrative on the Case Closure page will be deleted once the Case is reopened. **SAVE TO DATABASE**

Reopen a Closed Referral

- If the Focus client has already been pushed to a Case, you will not be able to do this!

Open the Referral – it will be 'BLUE'. [green/blue/red/orange/magenta icon]	**ACTION** **Client Disposition** Select the child you want to remove the disposition for. Remove the date from 'Closure Reason Date', then choose 'None' as the Closure Reason. **SAVE TO DATABASE**

MOVING CASES
ASSIGNMENT / TRANSFER

 OPEN CASELOAD to do these functions:

| MAKE ASSIGNMENT	ACTION
	MAKE ASSIGNMENT Use this screen to make Secondary and Read Only assignments to a case or referral. **SAVE TO DATABASE**
TRANSFER ASSIGNMENT 	**ACTION** **TRANSFER ASSIGNMENT** Use this screen to transfer Primary or Secondary assignment of a case or referral to another worker. Multiple cases can be moved at the same time. **SAVE TO DATABASE**

Assigning a Case

The Case can only have one Primary Assignment.
It can have multiple Secondary Assignments.

Open the Existing Case:	
	Use the + plus sign in the left corner of the page to activate. Choose Primary or Secondary assignment. Select the Office, Unit and Caseload to assign the case.

Updating the Service Component

This page populates the FCIS Report that is used by CDSS in determining the number of open cases in each program for funding purposes.
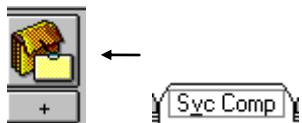
Open the Existing Case:	
	Use the + plus sign in the left corner of the page to begin. Choose the correct Service Componenet from the drop down menu – you can adjust the dates to reflect court ordered dates.

VIEWING REMINDERS FOR A CASELOAD

FROM THE CONTROL PANEL:
⇒ **CLICK ON CASELOAD**
⇒ **CLICK ON REMINDER**
 	
 ←
 	
 ←
	In the Caseload Application, use the Reminder Notebook to view reminders.
	
	Select the Caseload you want to view reminders for.
	
	Filter: Use the filter to narrow what you are looking for.
	
	⇒ Time Frame:
	    ⇒ All
	    ⇒ Current
	    ⇒ Overdue
	    ⇒ Date Range
	
	⇒ Highlight Reminder(s) you want to view.
	⇒ Highlight a Case or Referral you want to view the reminders for.
	
	APPLY

There is no Print capability for this function. To capture a 'picture of the screen', press ALT + PrintScreen.

Open a blank WORD document, then press Ctrl + V.

CREATING CASELOAD REPORTS

Reports Available:

⇒ **Caseload Court Calendar**
⇒ **Caseload Reminder Report**
⇒ **Caseload/Family Listing and Reminder**
⇒ **Contacts/Visits Schedule for Caseload**
⇒ **Unit Court Calendar Report**

FROM THE CONTROL PANEL – CLICK ON CASELOAD	File Print Report
	Under the 'Area of Interest', be sure that Caseload Reports is selected. Then select the report you want. Select either Print or Print Preview. Select the Caseload you want to print the calendar for. Specify the date range and how the report should be sorted.

CREATING PROGRAM MANAGEMENT REPORTS

FROM THE CONTROL PANEL – CLICK ON CASELOAD OR CLIENT SERVICES	File Print Report
OR	Under the 'Area of Interest', select the category of Program Management report you want to print. ⇒ Program Management – Case ⇒ Program Management – Court ⇒ Program Management – Intake ⇒ Program Management – Placement ⇒ Program Management – FCIS Select the Report you want, and Print. From the dialog box that appears, select the appropriate parameters, then OK.

Funding Issues in Child Welfare

Workload Standards for Justification of FTE's
CFL 06/07-10 dated August 4, 2006

Emergency Response (ER)	15.8
ER Assessment (ERA)	320.0
Family Maintenance (FM)	35.0
Family Reunification (FR)	27.0
Permanent Placement (PP)	54.0

How Referrals are Disposed into Dollars:

✓ Each child disposed = one count.
✓ A 'client notebook' and an 'allegation' must be entered for each child in order to be able to dispose into $.
✓ Emergency Response Referral document must have been created or the referral won't count.
✓ All reminders must be satisfied or the referral won't count.
✓ Supervisor must Approve the referral before it can be counted.
✓ The disposed children are counted the month the Supervisor approves the referral.
✓ Children assessed in narrative fashion only will not be counted unless the 'client notebook' and 'allegation' is created for each child.
✓ Evaluated Out referrals – will receive one count for each child entered – with a 'client notebook' and 'allegation'.
✓ Children that are not a 'reported victim', (but in the same household as victim and subsequently assessed for risk), can be entered with the allegation of: 'At Risk, Sibling Abused ' or 'Substantial Risk'.

How Cases are Converted to Cash:

✓ When children are disposed from a referral into an open service case – each child = one case.
✓ The case opens into the program 'Emergency Response'. There are no counts for active cases in Emergency Response.
✓ Once the child is a 'Case' – the service component must be changed to a valid program code within 90 days. The county receives an 'exit count' when the case exits the Emergency Response program into an ongoing service component. This 'exit count' is an Emergency Response count on the SOC 291.
✓ Cases are 'counted' if their service component = Family Maintenance, Family Reunification, or Permanent Placement.
✓ If service component for an active case remains in Emergency Response past the 90-day window – the 'exit count' is lost forever.

PM Report – Allocation Fields User's Guide 6/7/99
http://www.hwcws.cahwnet.gov/ApplicationResources/Case.asp

Case Plan in CWS/CMS -Frequently Asked Questions

Do I have to open each child's case in order to do a Case Plan?
No, you can complete a Case Plan for multiple children in only one child's case that will be accessible in all cases – as long as you include them as a Case Plan participant.

Is there ever a time when I should open each child's case?
Yes – when 'splitting a case plan'. A case plan is split, when the 'in effect' Case Plan includes more than one Focus child, and the update will NOT include all of the same children.

I can't select all siblings as 'focus' children for my case plan?
All 'focus' children must have an open case. Then, check the 'related clients' page for each child to make sure they are related as siblings.

I am trying to ask for approval for my Case Plan……why is my Approval button greyed out?
- Yellow Field has not been completed. (Save to Database to find quickly)
- Primary Language or Primary Ethnicity missing for a Focus Child (Client Notebook, Id Page)
- Case Plan Goal missing for a Focus Child (CP Participants Page in Case Plan Notebook)
- At least one service objective for at least one Case Plan participant (Service Objectives Page in Case Plan Notebook)
- Case Plan document has not been created – if an Initial Case Plan
- Case Plan Update document has not been created – if a Case Plan Update.
- Case Plan Appropriateness Description box blank – if a Case Plan Update. (ID page of Case Plan Notebook)

Can I spell check my Case Plan Document?
Yes! Once you have a Word document open, all the usual Word tools are available.

If I make changes to the Case Plan Word document, will it update the screens also?
No, changes, spell checking, etc to the Word document will only affect the Word document. The screens where the information originally was entered will still be wrong!

I have updated my screens, and saved to Database. Why won't my document reflect those changes?
The 'OLD' document must be removed, so that you can create a 'NEW' document.

Is it possible to modify a Case Plan that has already been approved?
Yes! A supervisor (or someone with approval authority in CWS/CMS), can do this. Under Action – and Approval…….change to 'Required Modifications.' That will allow the Case Plan to be changed.

Case Plan Effective Date:
Supervisor controls the effective date of case plan – by adjusting it to the date they want, then Approve. The date defaults to today's date, but should be back dated to actual signed date.

Does the Case Plan Approval have any effect on Outcomes?
Yes! If the case plan contains a visit waiver, it won't take effect in the monthly visit outcome measure until approved.
Parental involvement/engagement efforts must be entered on the ID page of Case Plan – this measure not yet in place, but will be in the future.

Using the Navigational Tool
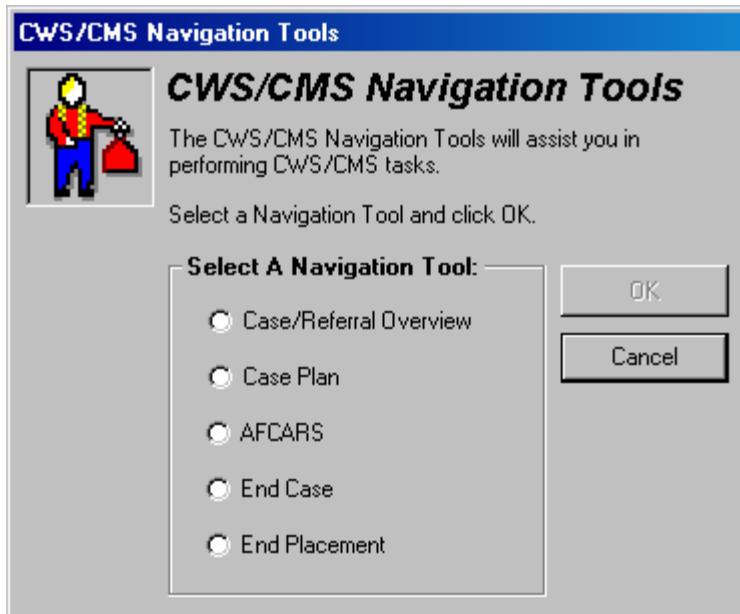
Case/ Referral Overview
- Review a Case or Referral quickly without going through each notebook
- Can retrieve contact history and read each narrative here.
- Placement, Court and Case Plan history can be retrieved.
- Can easily spot missing or incorrect information.

Case Plan
- All areas of the case plan screens can be reviewed here.
- Quick way to see fields that have not been completed.
- Use the tool to help find reason approval button is disabled.

AFCARS
- Puts all AFCARS fields in one place so they can be checked quickly.
- AFCARS data is used for the CFSR data, as well as funding issues.
- Can review AFCARS data for each report period.
- Can use the tool to go to each field for further review or input.
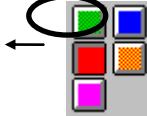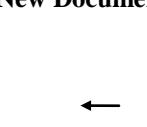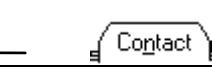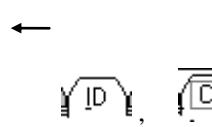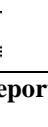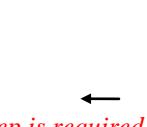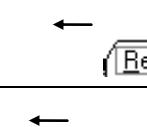
End Case
- Use this tool to quickly locate reasons why worker unable to close case.

End Placement
- This tool can be used to close placements or placement episodes.

QUICK GUIDE TO DISPOSING A REFERRAL

Open Existing Referral	Open the referral you want to record the results of an investigation.
Create New Document - Investigative Narrative	An Investigative Narrative - a freeform Word document – can be created to record the results of an investigation in 'narrative fashion'. Spellcheck, Save, Print, Close. *This step is optional - if the worker chooses to record all narratives in Contact Notebook*
Create New Contact	At least one **completed/attempted**, **In Person** contact must be recorded, for the **purpose of Investigating the Referral.**
Conclude the Allegation(s)	Open the existing allegation(s), and enter the "date alleged abuse began" if known on the ID page. Use the Conclusion page to record whether the allegation was substantiated, inconclusive, or unfounded.
Create Cross Report (Child Abuse Investigation Report) AKA - DOJ	After using the Create New Cross Report icon, then select Print Report from the File menu to actually print the document. Close Word. *This step not required if allegation is General Neglect or Substantial Risk * or if allegations were Unfounded. Check under 'Reminders' if you are not sure whether or not to report!*
Client Disposition	Under the **Action** Menu, select 'Client Disposition' and dispose of each child individually. Request pending approval for each.
Create New Document - Letter to Mandated Reporter *This step is required only if Mandated Reporter requires written feedback*	Select the Response to the Mandated Reporter, and Word automatically creates the letter which can be added to, modified, and spell checked. Save, print and close or minimize Word.
	Under 'Feedback Details', record the date that the Response to the Mandated Reporter was sent.
	Check Reminders. Click on Filter to make sure all reminders available. Only if all reminders have disappeared, SAVE TO DATABASE

Reviewing the Placement Information

This dialog box contains Placement history for a child.
It should be review to insure accuracy – of the number of placements and that no placements are missing.
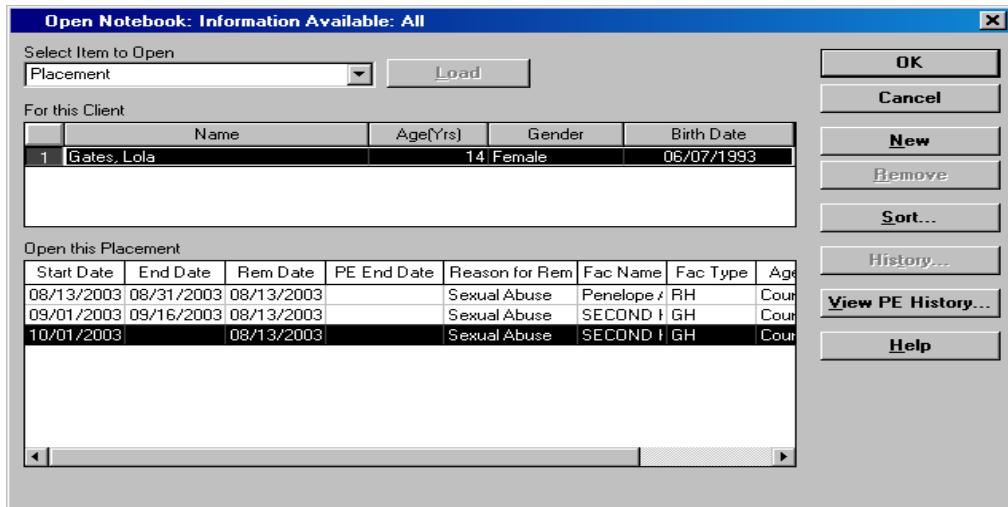
Review the following pages in the placement:

ID	On this page, check the following: • Placement Count • CHDP / HEP information recorded • Proximity of child's school considered • Sibling placement rationale
Ongoing Requests	The amounts listed on this page – populate the SOC 158A for payment to the foster parent.
Relative/NREFM Assessment	If this is a Relative Placement – be sure this page shows the approval of the home.
End Placement/Episode	This page is only used to close a placement or close a placement episode. **Remember**: termination of the episode is only when child goes to their final and permanent placement home or otherwise. This page is important for outcome measures.

CREATING A SOC158A
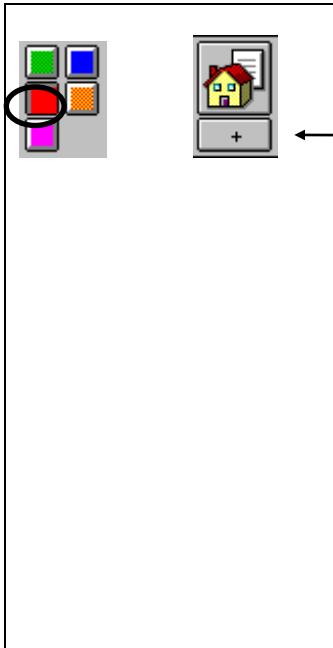
|	
←	**Create New Document – Placement.** **Select the SOC158A from the list.** *[Generate New Documents dialog box showing County: State of California, Documents to Generate list with Type column: 3 Agency Group Home Agree-Child Placed-Spa, 4 Agency Group Home Agreement-Child Placed, 5 Agency-Foster Parents Agreement-Child Pl, 6 Agency-Foster Parents Agreement-Spanish, 7 SOC158A - Foster Child's Data Record, 8 SOC158A - Transfer County and/or Agency; buttons OK, Cancel, Help]* **Select the Placement that you want the SOC158A for.** **The SOC158A will be generated, populated with information from various notebooks. SAVE, PRINT & CLOSE.** **SAVE TO DATABASE**

UPDATING A S0C158A

UPDATE INFORMATION IN THE APPROPRIATE NOTEBOOKS, AND THEN SAVE TO DATABASE.
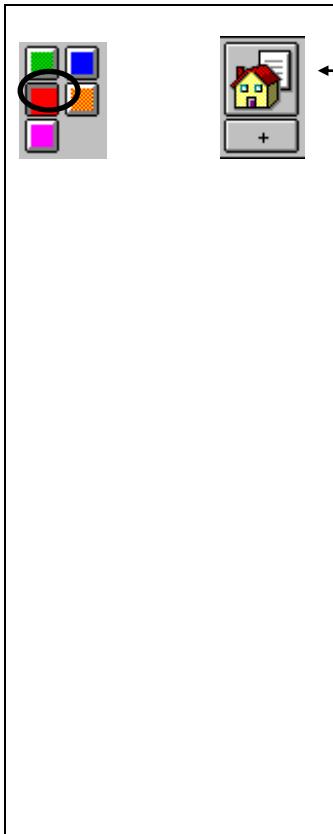
←	**Open the Existing Document – Placement.** **Highlight the SOC158A that you want to generate with updated information.** **REMOVE it.** **Then, click NEW.** *[Generate New Documents dialog box showing County: State of California, Documents to Generate list with Type column: 3 Agency Group Home Agree-Child Placed-Spa, 4 Agency Group Home Agreement-Child Placed, 5 Agency-Foster Parents Agreement-Child Pl, 6 Agency-Foster Parents Agreement-Spanish, 7 SOC158A - Foster Child's Data Record, 8 SOC158A - Transfer County and/or Agency; buttons OK, Cancel, Help]* **Select the Placement that you want to generate the updated SOC158A for.** **The SOC158A will be generated, populated with the updated information from various notebooks.** **SAVE, PRINT & CLOSE.** **SAVE TO DATABASE**

IMPORTING DOCUMENTS TO A CASE or REFERRAL:

|	
CASE **OR** **REFERRAL**	Click on the 'Create New Documents' icon and then **IMPORT**. Select the file from the drive and directory it is in, and name it. Any Word document outside of CWS/CMS can be attached to a case or referral here. **Generate New Documents** County: State of California Documents to Generate — Type 1 Case Notes OK / Cancel / Import / Help
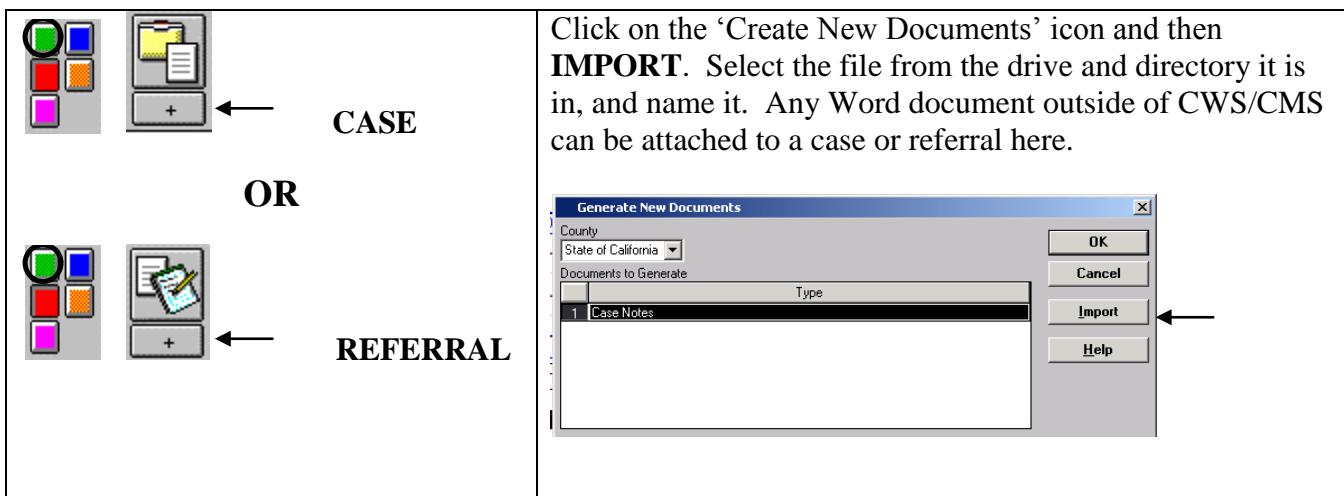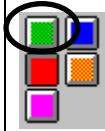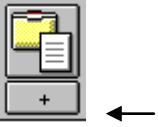
Find the Document that you want to import – you can access A, C, G drives from here.
Highlight the Document.
Name the Document in the Yellow – File Title field.
Then Click OK.

Import External Document

File Name:
Relative Assessment2.doc

NewUserAug03.doc
NewUserNov02.doc
NewUserOct1.doc
NewUserOct2.doc
Placement.doc
RDS with instructions.doc
Referral Traditional vs Zippy.doc
Relative Assessment 5.doc
Relative Assessment2.doc
search.doc
Supervisor Training.doc
Supervisor Training2.doc

Look In:
C:\
Documents and Settings
Terry Luna.CENTRAL-XVSTQ
My Documents
Fresno County

Files of Type:
Word Documents [*.doc]

Drives:
c:

File Title:
Home Evaluation - Luna Family

OK / Cancel / Help

The Document will open – review the document to make sure it is the one you wanted to import.
Close the document – you can access it again – under 'OPEN EXISTING DOCUMENT'

SAVE TO DATABASE

Accessing County Templates from a Case or a Referral


In a Case- Use 'Create New Document'

In a Referral – Use 'Create New Document'

Use the + sign to access the 'New' documents within Case or Referral.

Select your county from the County menu. All county templates will appear in the list, select the template you wish to access, and use the OK button.
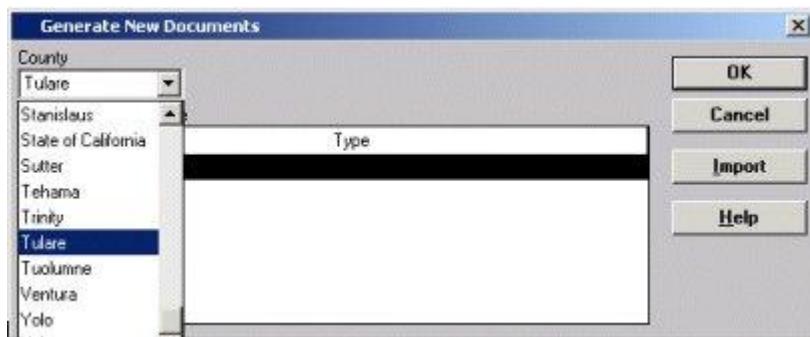
The template will open in WORD.   The document can be updated and spell checked. **SAVE, Print and Close. The document will be saved as a permanent part of the case record and can be accessed from the Existing Document icon.**

SAVE TO DATABASE