

Quick Guide to CWS/CMS Release 7.6 Changes

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Quick Guide to Release 7.6 Changes

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SEARCH:

Search dialogue box has been expanded vertically so all the search criteria fields are displayed and user does not have to scroll to see all.

This functionality is in Client, Client/SCP and Placement Facility Match Search dialogue boxes.

The screenshot shows a 'Search' dialog box with a title bar containing a close button (X). Below the title bar is a 'Search Type' dropdown menu with 'Client' selected. To the right of the dropdown are three buttons: 'OK', 'Cancel', and 'Help'. The main area of the dialog contains a list of search criteria fields, each with a corresponding checkbox to its right. The fields are:

Last Name	<input type="checkbox"/>
First Name	<input type="checkbox"/>
Middle Name	<input type="checkbox"/>
Social Security Number	<input type="checkbox"/>
Client Index Number (CIN)	<input type="checkbox"/>
Client ID	<input type="checkbox"/>
Gender	<input type="checkbox"/>
Approximate Age	<input type="checkbox"/>
Date of Birth	<input type="checkbox"/>
Ethnicity	<input type="checkbox"/>
Street Number	<input type="checkbox"/>
Street Name	<input type="checkbox"/>
City	<input type="checkbox"/>
County of Residence	<input type="checkbox"/>
State	<input type="checkbox"/>
ZIP Code	<input type="checkbox"/>
Home Phone	<input type="checkbox"/>
State ID Number-County	<input type="checkbox"/>
State ID Number-Aid Code	<input type="checkbox"/>
State ID Number-Serial Number	<input type="checkbox"/>
State ID Number-Assistance Unit Cd	<input type="checkbox"/>
State ID Number-Person Number	<input type="checkbox"/>
Juvenile Court Number	<input type="checkbox"/>
Juvenile Court Number County	<input type="checkbox"/>

On the right side of the dialog, there are three checkboxes for advanced search options:

- Phonetic Name Search
- Phonetic Street Name Search
- Partial Address Match

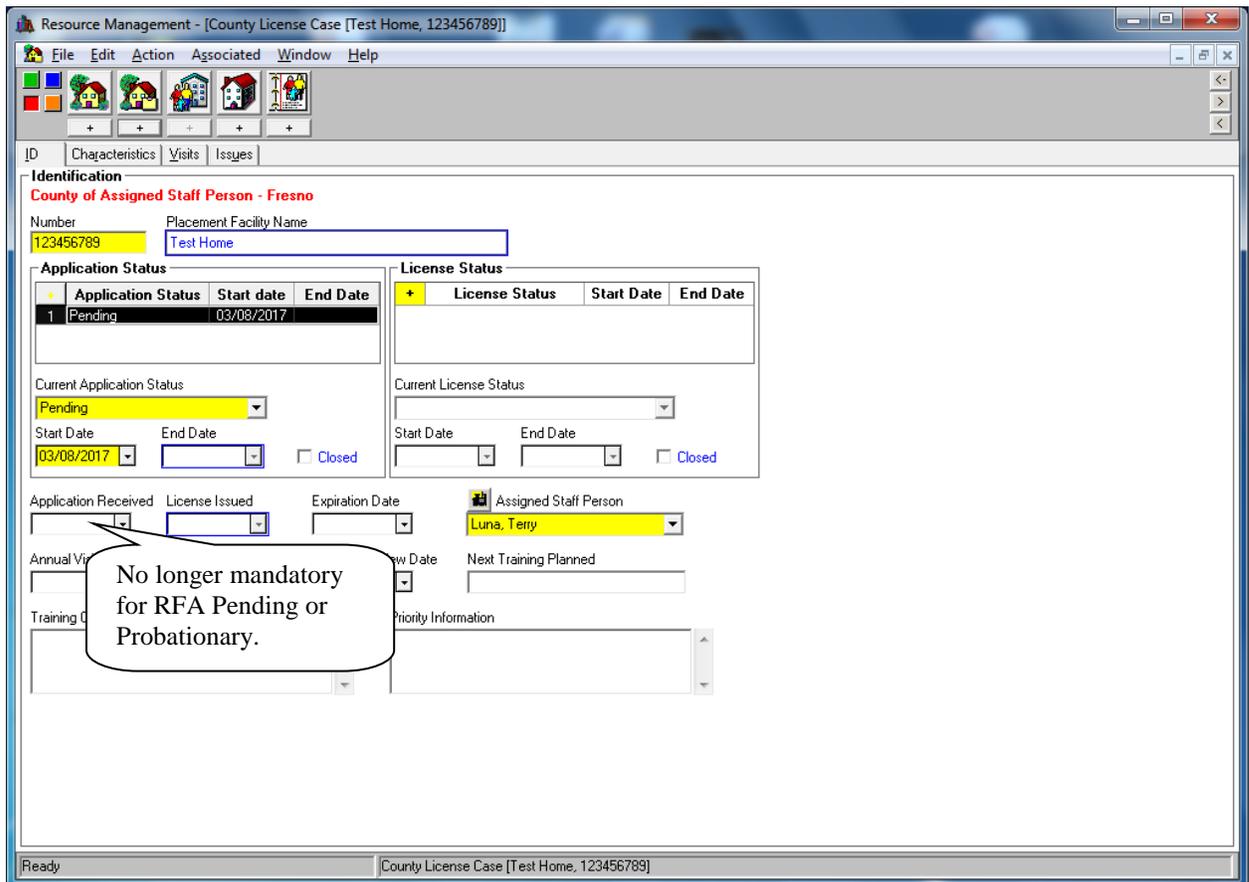
Changes in County License Case Notebook for Resource Family Homes:

The 'application received date' is no longer required to be less than or equal to the License Issued date for RFA licenses.

This will allow a home to reflect the application status Approved, and license status RFA Probationary so that placements can be entered even if the application has not yet been received or the home has not yet been completely approved .

The 'application received' field is no longer mandatory when the current license status is RFA Probationary or RFA pending. The 'application received' date must be less than the 'expiration date'.

Worker no longer needs to enter the application received date until the application is actually received. This will not stop placement – if an emergency placement has already been made.



Resource Management - [County License Case [Test Home, 123456789]]

File Edit Action Associated Window Help

Characteristics Visits Issues

Identification
County of Assigned Staff Person - Fresno

Number: 123456789 Placement Facility Name: Test Home

Application Status			License Status		
Application Status	Start date	End Date	License Status	Start Date	End Date
1 Pending	03/08/2017				

Current Application Status: Pending
Current License Status: []
Start Date: 03/08/2017 End Date: [] Closed
Start Date: [] End Date: [] Closed

Application Received: [] License Issued: [] Expiration Date: [] Assigned Staff Person: Luna, Terry

Annual Visit: [] View Date: [] Next Training Planned: []
Training Date: [] Priority Information: []

No longer mandatory for RFA Pending or Probationary.

Ready | County License Case [Test Home, 123456789]

Placement Home Document Notebook

A new notebook has been added in the Placement Facilities section of Resource Management that gives user the ability to store documents associated with placement facilities. It also allows users to import documents that are associated with a Placement Home. This feature can be used with any type of placement facility. The documents will only be able to be viewed in Resource Management in the placement facility they were added to.

Create New Document – Placement Home



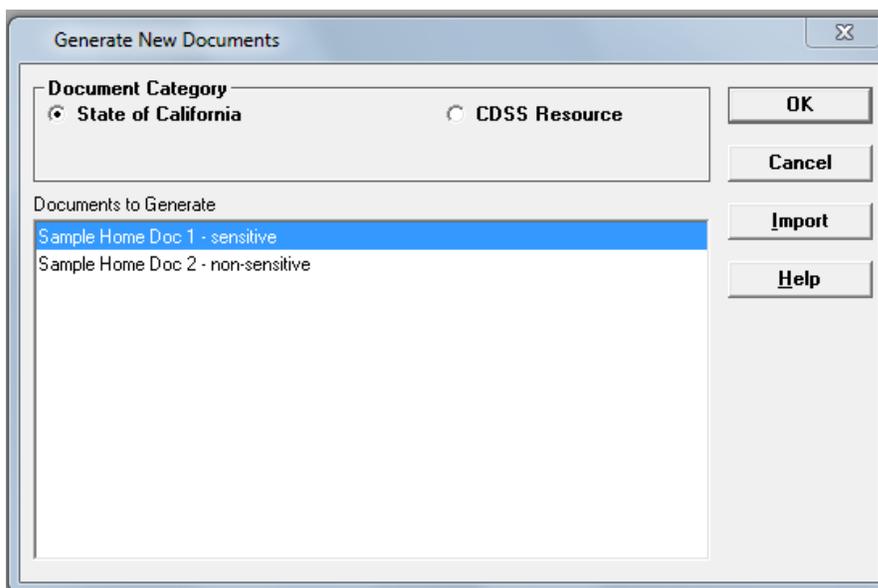
You must have a Placement Home opened before you can use this functionality. If you use the plus before you have a home open, the search box will appear so that you can find and open the home.

When you use the plus+ to create a new Placement Home document: a list of templates will be in the list that have been loaded by the State. Some of the templates that will be loaded are sensitive and will require the user to have County License Case Privilege.

NOTE: The system templates will be added in a later release.

When added, documents under the State of California section will have the ability to be auto-populated, but documents under the CDSS Resource section will not auto-populate.

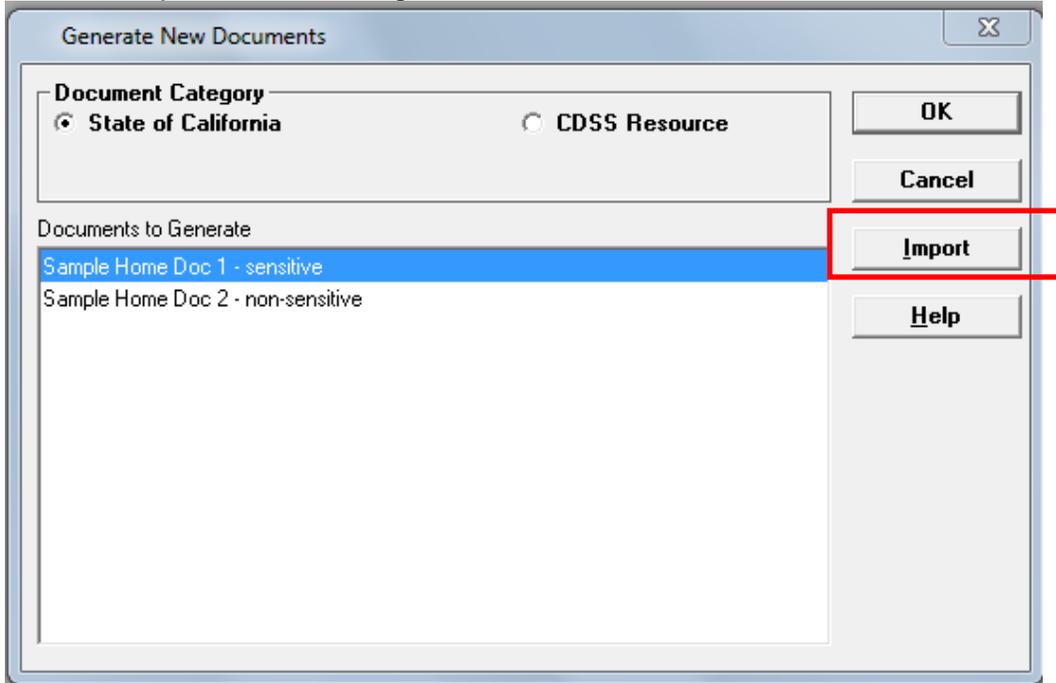
There is no 'county' section for counties to upload their own templates.



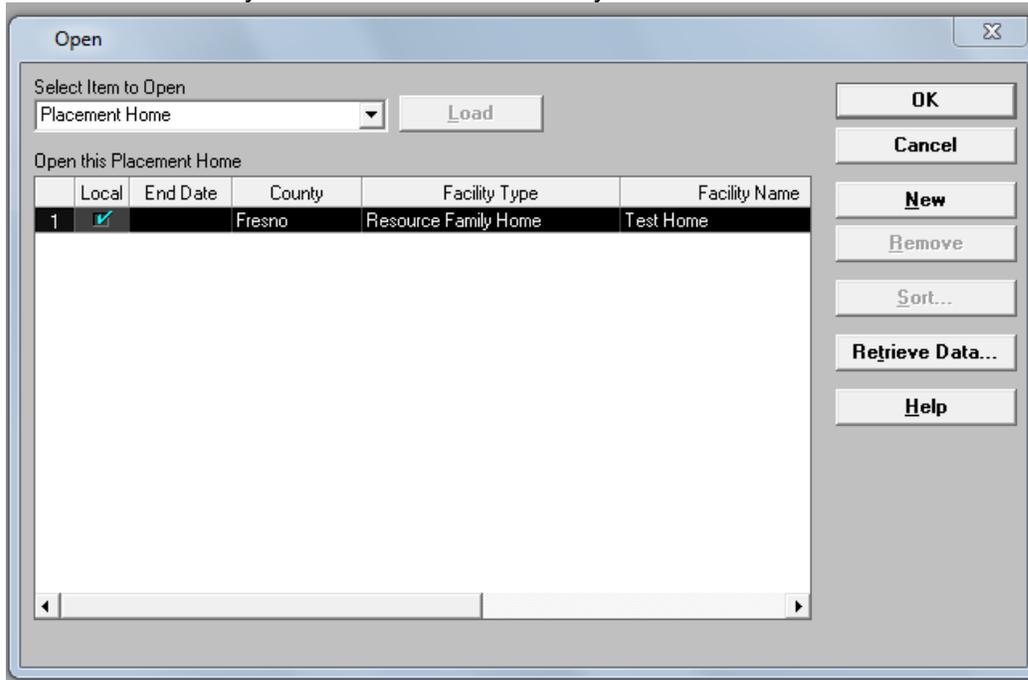
Import Documents to a Placement Home:

Open the Placement Home that you want to upload documents into, then use the plus+ under the Placement Home Document notebook:

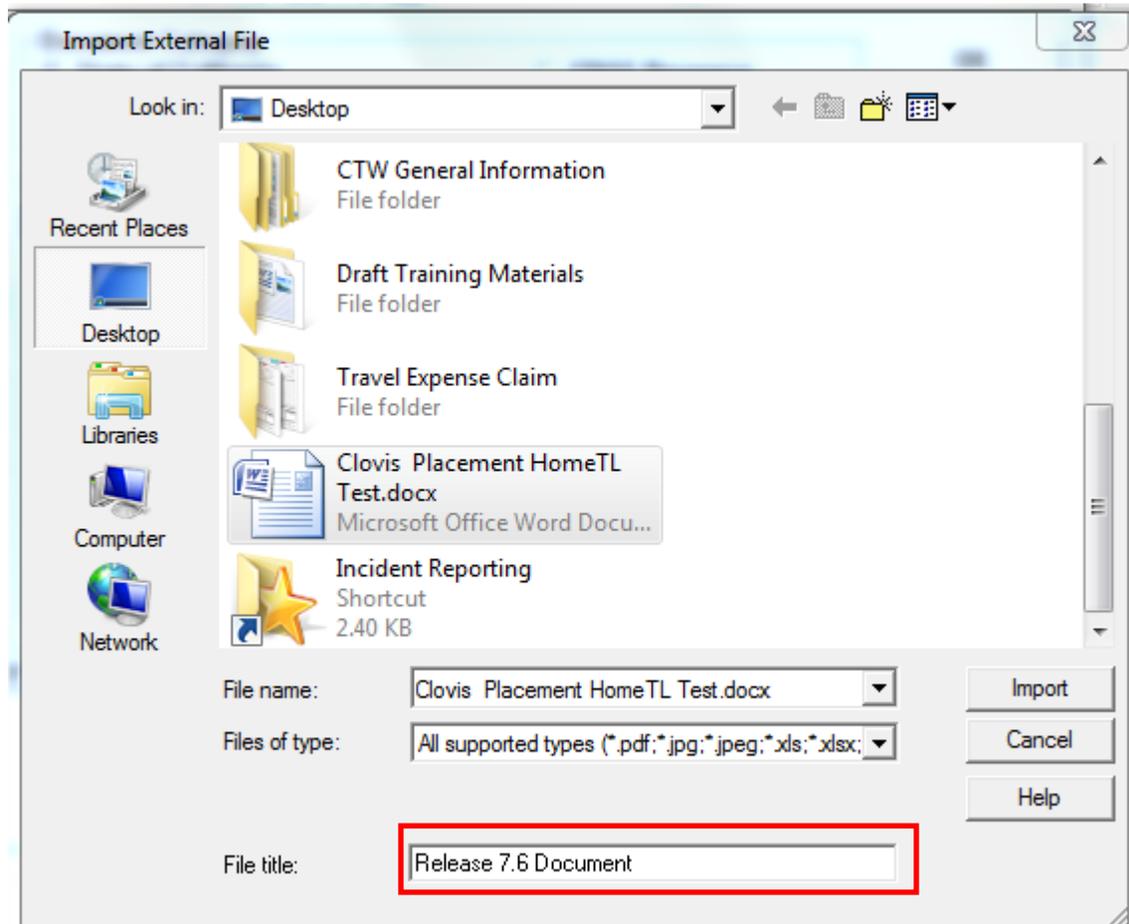
Use the Import button to begin:



Choose the home you want to associate with your document.



Find and select the document that you want to import, and give it a name in the File Title field. Note: there is a 5MB limit for any individual file.



Once imported, the document will show under 'Open Existing Document-Placement' associated with the Placement Home. Users in the same county can edit the document.

Documents can only be removed by users with 'county administration' authority and in the same county as the user that created the document. You cannot remove a document created or imported by another county but you can view it..

Note: If the Placement Home address changes and worker uses the Process Placement Home Move functionality, any documents associated with the old address will be moved to the placement home with the new address and will not be available in the old home.

Changes in Placement:

ID Page:

The screenshot shows a software application window titled "Client Services - Case [Test Child] - [Placement [Test Home]]". The window contains several sections for managing a child's placement:

- Identification and Approval:** Includes fields for Start Date (11/24/2015), End Date, Agreement Effective Date (11/24/2015), Agency Responsible (County Welfare Department), Placement Home (Test Home), Facility Type (Relative/NREFM Home), Care Provider Relationship To Child (Relative Nonguardian), Program Number, Placement Count (5), Primary Substitute Care Provider (Home, Test A), and checkboxes for Client is a Minor/NMD Parent, Emergency Placement, De Facto Parent, Active Confidential Placement, and Child is Placed with this Minor/NMD Parent.
- Placement Program History:** A table with columns for Start Date, End Date, and Placement Program. It shows a history of placements, with a dropdown menu for Placement Program Type showing options like Dual Agency Placement, Intensive Services Foster Care, Intensive Treatment Foster Care, Multidimensional Treatment Foster Care, and Whole Foster Family Home.
- Legal Auth. For Placement History:** A table with columns for Legal Auth. For Placement and Effective Date. It shows a history of legal authorizations, with a dropdown menu for Legal Auth. For Placement showing options like WIC 300 a, b, c, d, f, g, i or j.
- CHDP Program:** Includes fields for Start Date (11/24/2015), Date Substitute Care Provider informed of CHDP Program and brochure given, and a checkbox for Substitute Care Provider Requested CHDP Services.
- Rationale:** Includes checkboxes for Certified License Pending Homes, Approved Homes, Group Homes, and Tribal Designee Consulted, along with a text area for Rationale Description.

In the Placement Program History grid, a new value of Intensive Services Foster Care has been added.

Current values now include:

- Dual Agency Placement
- Intensive Services Foster Care
- Intensive Treatment Foster Care
- Multidimensional Treatment Foster Care
- Whole Family Foster Home

Ongoing Requests Page:

ID	Start Date	Stop Date	Rate Type	Projected End Date
1	11/24/2015		Basic	

Rate Type
 Basic Rate
 Additional Rate

Total
Active Rate Total: 698.00

LA APPS Rates
APPS Schedule/Level: [Dropdown]

Request Details
Start Date: 11/24/2015
Projected End Date: [Dropdown]
Payment Stop Date: [Dropdown]
Basic Rate: 698.00
Additional Rate: [Text Box]
Payment County: Fresno

Miller-Youakim Referral
 Informed
 Informed and Accepted
 Not Yet Informed

Payment Reason
Payment Type: Home Based Family Care
Rate/Service Level: [Dropdown: <None>, Basic, Level 2, Level 3, Level 4]
Reason Description: [Text Area]

Approval
Approval Status: Request Not Submitted
Date: [Text Box]

The Additional Payment Reason section has been renamed to Payment Reason. Once a basic rate has been entered, you will choose Home Based Family Care under Payment Type.

Home Based Family Care is the only value available. Once that is selected, you can choose the level of care value.

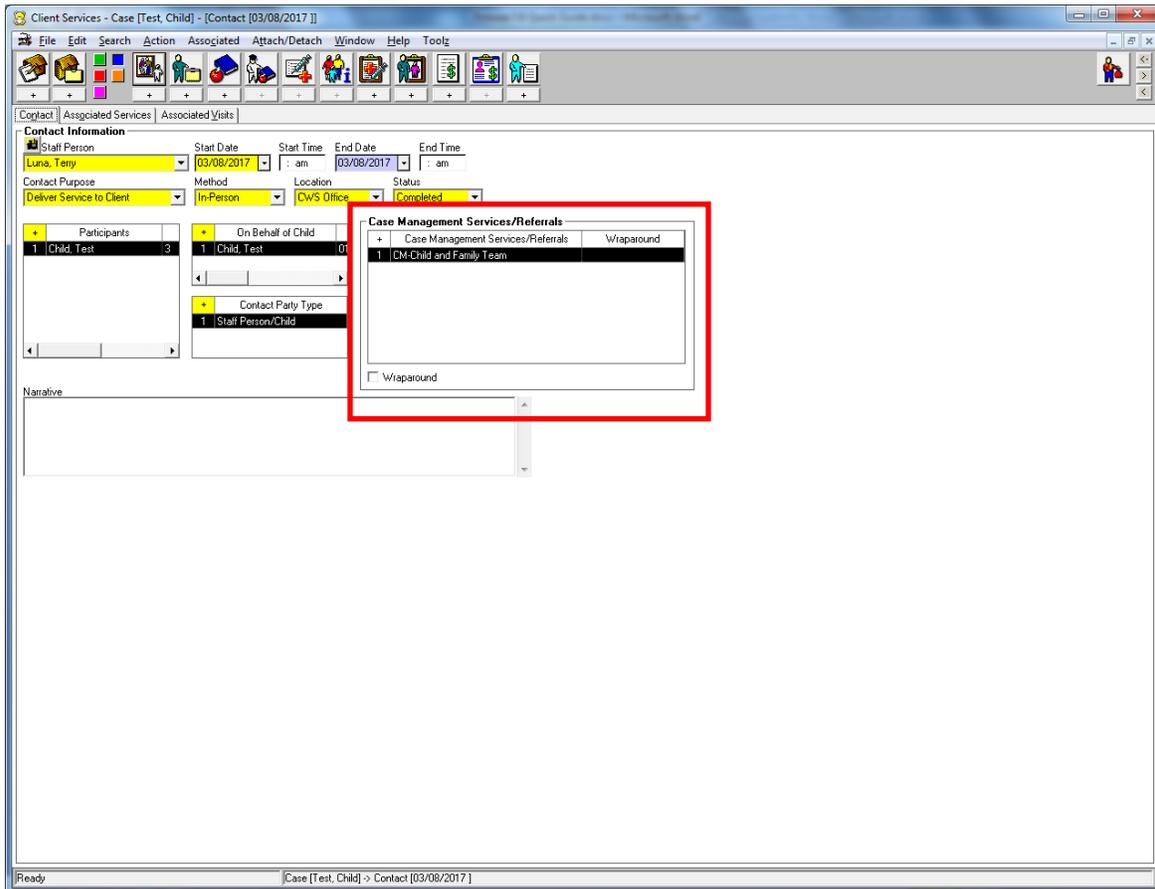
Choices are:

- Basic
- Level 2
- Level 3
- Level 4

The amount entered in the basic rate field will still populate the SOC158A.

New Values added in Contact Notebook to facilitate documentation of Child & Family Team Meetings:

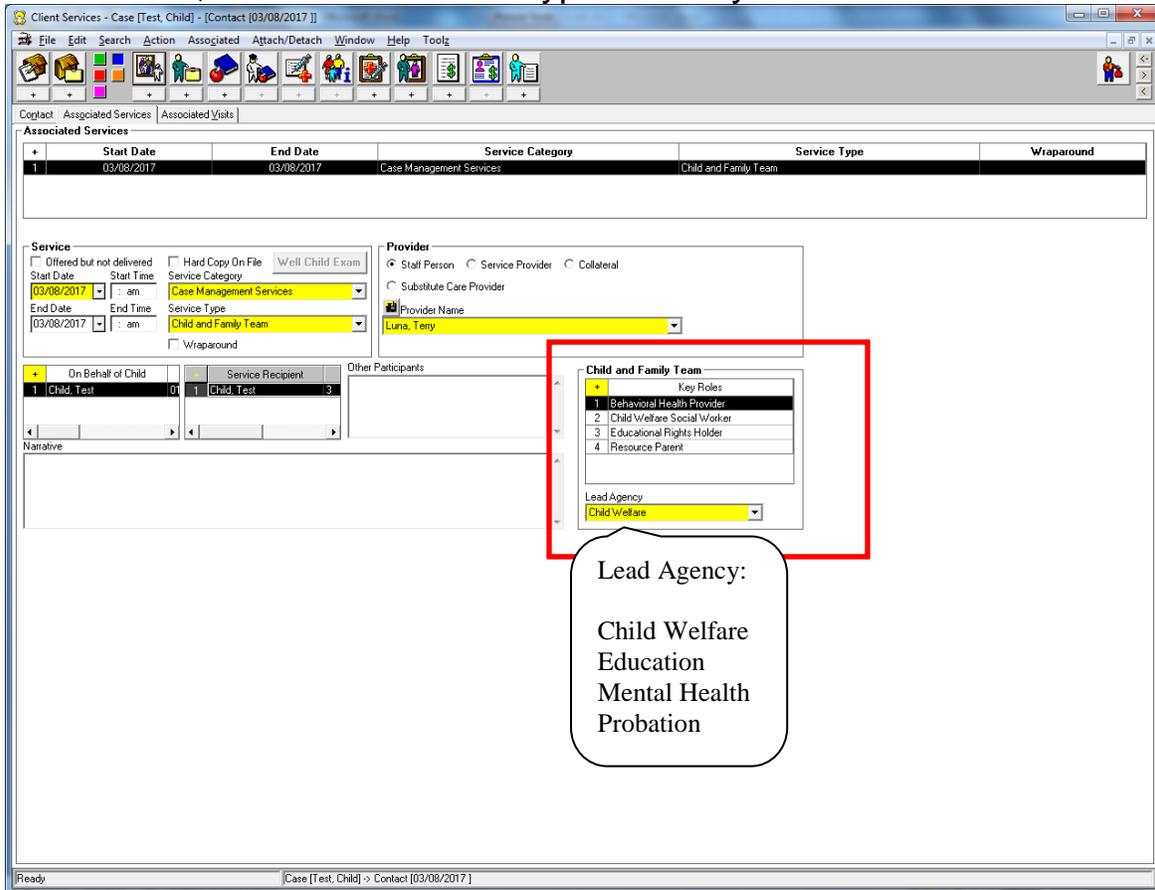
Contact Page:



Under Case Management Services/Referrals grid, new value of CM-Child and Family Team added.

When this selection is chosen, it automatically completes the Associated Services page, but the worker must complete the mandatory fields on that page.

On the Associated Services page, the Child and Family Team line has been added, but the worker will now have to choose the lead agency and the roles of the team members that attended. Multiple values can be selected; however each role type can only be selected once.



Values under the Key Roles section:

Behavioral Health Provider
 Child
 Child Welfare SW
 Clergy
 CASA
 Education Partner
 Ed Rights Holder
 FFA Staff
 Natural Support
 Other Community Support
 Other Family

Parent/Father
 Parent/Mother
 Parent Partner
 Probation Placement Officer
 Regional Center Provider
 Resource Parent
 STRTP Staff
 Therapist
 Tribal Representative
 Youth Partner

There are Narrative areas on both the Contact page and the Associated Services page to use for documenting the results of the meeting.

You will also be able to customize your Delivered Services Log with this new selection of Child and Family Team. The Lead Agency and Key Roles will be displayed on your Delivered Service Log.

Delivered Service Select Filter

Date Range

From: 03/08/2017 To: 03/08/2017

Buttons: Apply, Cancel, Help

Delivered Service Log
Do you want to print narrative?

Contacts Yes No

Visits Yes No

Services Yes No

CFT Lead Agency/Key Roles

Case Plan:

Child and Family Team is included in the values under 'Case Management' and 'Planned Client Services' in the Case Plan.

If selected under 'Planned Client Services', it will appear in the Client Responsibilities section.

<u>CLIENT RESPONSIBILITIES</u>						
<u>Activity</u>	<u>Times</u>	<u>Freq.</u>	<u>Completion Date</u>	<u>Provider</u>		<u>Wrap</u>
Case Management Services						
1. Child and Family Team			09/06/2017			

If selected under 'Case Management Services', it will appear in the Agency Responsibilities section.

AGENCY RESPONSIBILITIES

CASE MANAGEMENT SERVICES

1. Child and Family Team						
<u>For Whom</u>			<u>Beginning Date</u>	<u>Provider</u>		<u>Wrap</u>
Test Child			03/08/2017			