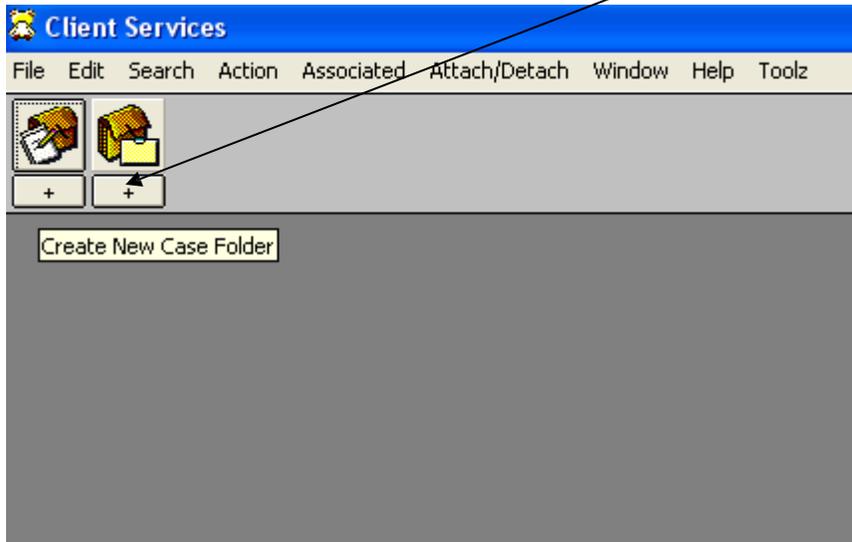


Opening a Case without a Referral in CWS/CMS

You can open a case without a referral by:

1) Clicking on the '+' sign to Create New Case Folder



You will then be presented with a list of clients in your workstation's cache (all clients in search results plus all clients in any referral/case you have accessed since the last time you saved to database or exited CWS/CMS without saving) that meet the criteria necessary to allow you to open a case for them (less than 19 years of age, not currently in an open referral, or not the case focus child in an open case):

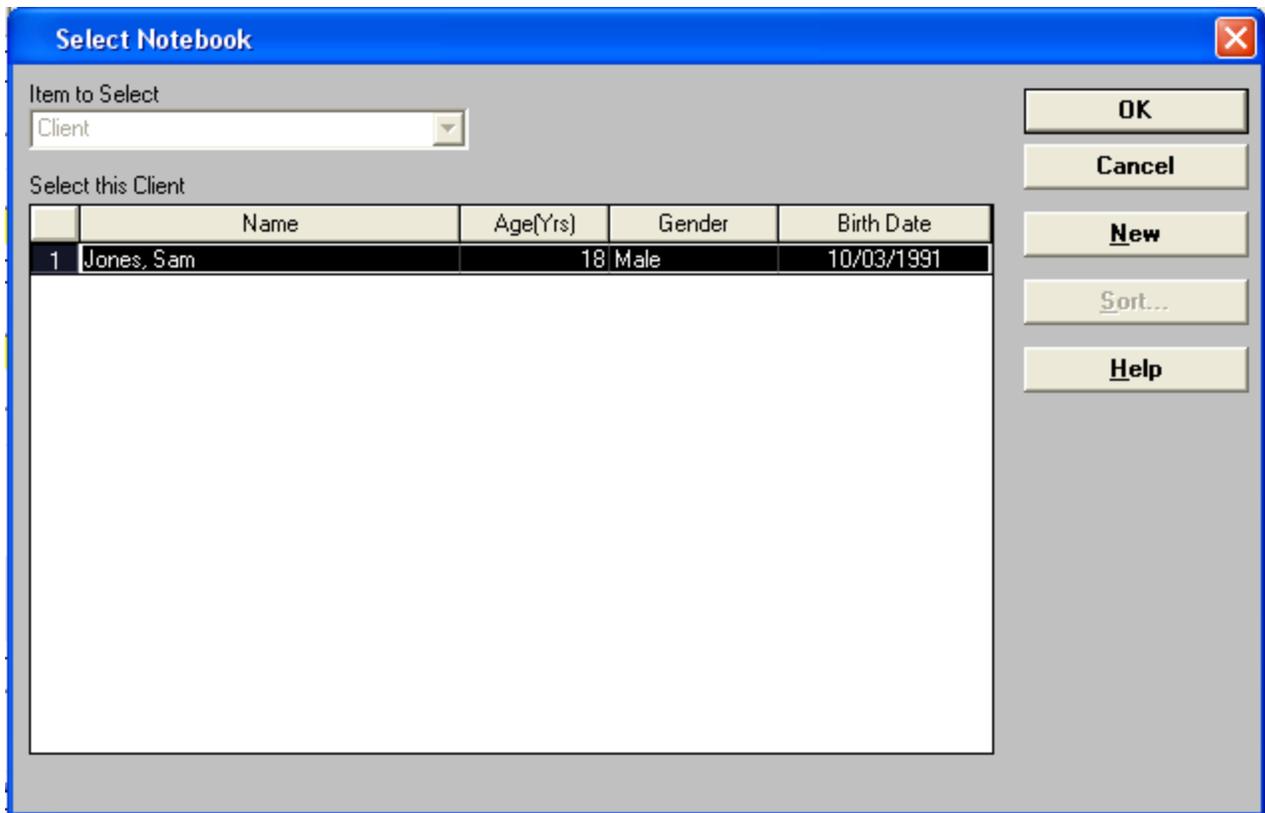
Suggest reformatting this as follows:

You will be presented with a list of clients in your workstation's cache, including:

- * All clients in search results;
- * All clients in any referral/case you have accessed since the last time you saved to database or exited CWS/CMS without saving.

These clients meet the criteria necessary to allow you to open a case for them as follows:

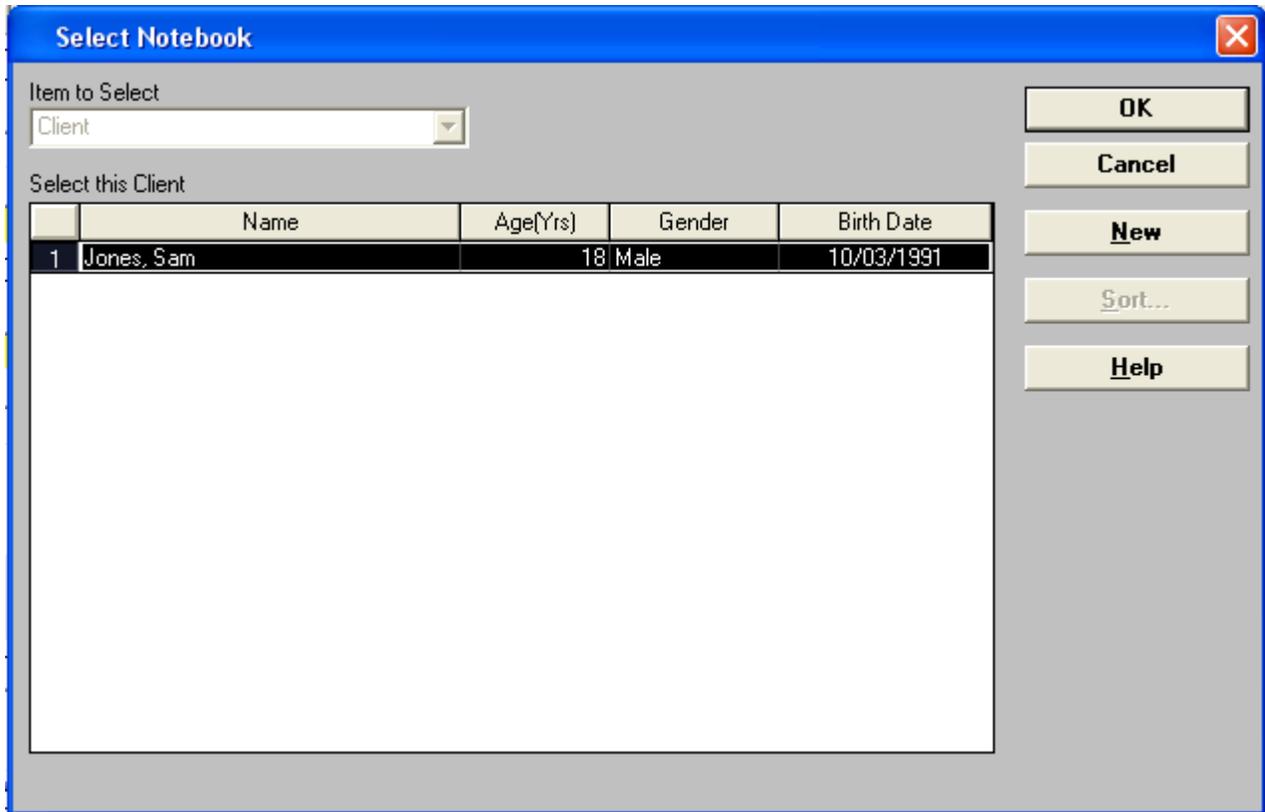
- * Less than 19 years of age;
- * Not currently in an open referral;
- * Not the case focus child in an open case.



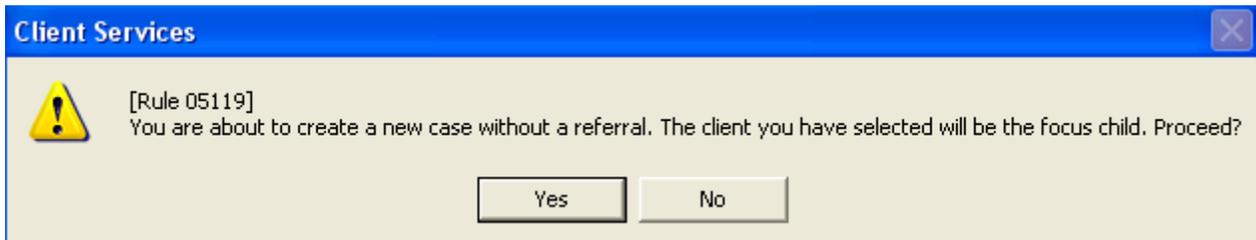
2) You can either select the appropriate client from the list that is presented and then click OK (see step 3) or click on New if you want to create a case for a client who does not currently exist in CWS/CMS after having searched for the client (see step 4).



There are two alternative procedures: 1) Selecting a client from the list; 2) Creating a case for client who does not currently exist in CWS/CMS. I recommend separating these two alternatives under different headings to avoid any confusion. It could be done without the need for additional graphics by presenting them in two columns.

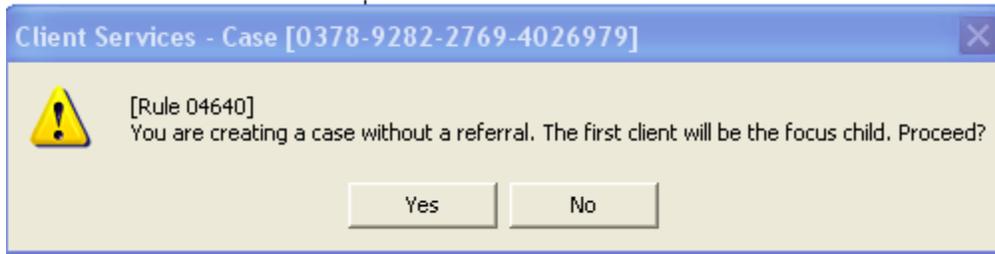


3) After clicking OK for an existing client, you will be presented with the following:



Click on Yes and you will be presented with the Client notebook of the case focus child and the new Case notebook. Before saving to database, you should verify that you have created the case for the correct case focus child. You will also have to complete the mandatory fields in the Case notebook (Case Name and Intervention Reason fields on the ID page; Service Component on the Svc Comp page; and assign the case on the Assignment page).

4) After clicking New for a client who does not exist in CWS/CMS, you will be presented with the following:



Click on Yes and you will be presented with the Client notebook of the case focus child and the new Case notebook. You will need to input the mandatory data in this new Client notebook (First Name, Last Name, and Gender). You will also have to complete the mandatory fields in the Case notebook (Case Name and Intervention Reason fields on the ID page; Service Component on the Svc Comp page; and assign the case on the Assignment page).