

# CFTM Data Entry Instructions for CWS/CMS

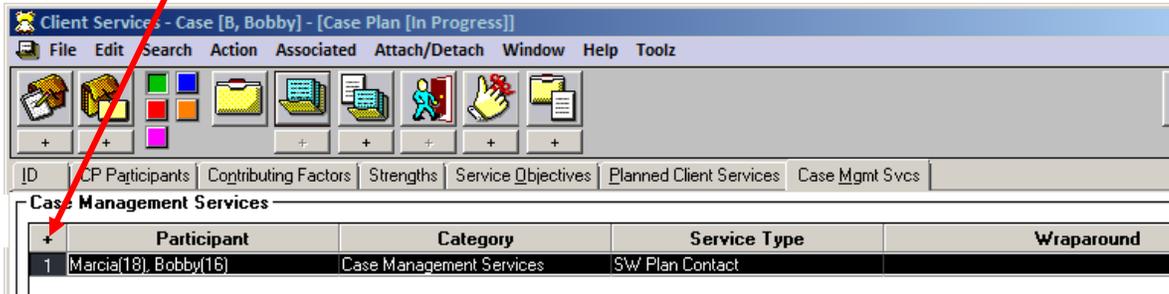
## Case Plan Notebook, Case Management Services

### Instruction: Add CFT as a Case Management Service

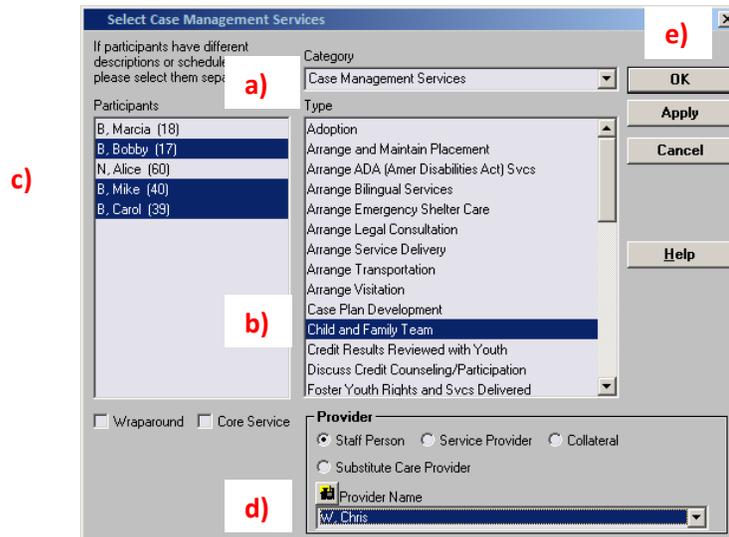
When documented in the Case Management Services tab, CFTs appear on the final Case Plan in the “Agency Responsibilities” section. This documents the agency’s responsibility to provide a CFT.

In the Case Plan Notebook, on the Case Management Services tab, Child and Family Team has been added as a new Case Management Services Category.

- 1) Click “+” to bring up the dialog box.



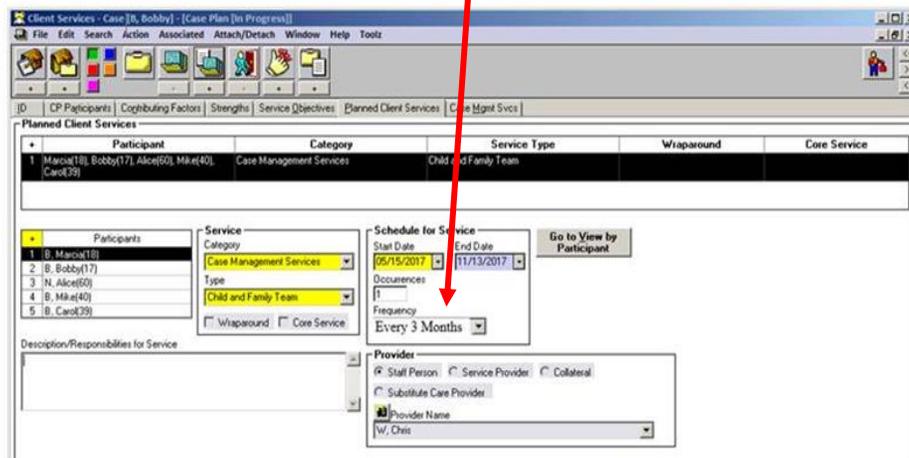
- a) Under the Category drop down menu, select Case Management Services.
- b) Under the Type drop down menu, select Child and Family Team.
- c) Select the participants from the participants list.
- d) In the “Provider” frame, select “Staff Person.”
- e) Click “OK.”



- 2) Complete the “Schedule for Service” frame.

- a) Occurrences must be “1” or more.
- b) Frequency must be a minimum of “Every 3 Months.”

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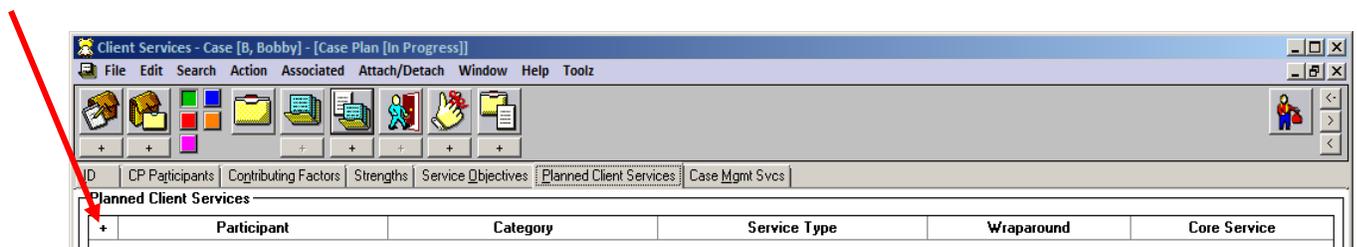
*Note: CFT meetings may occur more frequently. For example, if the needs of the child, youth, or NMD and family are such that CFT meetings are planned to occur on a monthly basis, then “monthly” should be selected on the “Frequency” drop down menu.*

### Case Plan Notebook, Planned Client Services Add Child and Family Team as a Planned Client Service

When documented in the Planned Client Services tab, CFTs appear on the final Case Plan in the “Client Responsibilities” section. This documents the family’s responsibility to participate in the CFT process.

On the Planned Client Services tab, Case Management Services has been added to the Category dropdown menu in the Select Planned Client Services Participants dialog box.

3) Click the “+” to bring up the dialog box. The new service type of “Child and Family Team” is available after the Case Management Services category has been selected:



- Under the Category drop down menu, select Case Management Services.
- Under the Type drop down menu, select Child and Family Team.
- Select the participants from the participants list.
- In the “Provider” frame, select “Staff Person.”

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e) Click “OK.”

The dialog box is titled "Select Planned Client Services Participants". It contains the following elements:

- Category:** A dropdown menu set to "Case Management Services".
- Type:** A list box with "Child and Family Team" selected. Other options include Adoption, Arrange and Maintain Placement, Arrange ADA (Amer Disabilities Act) Svcs, Arrange Bilingual Services, Arrange Emergency Shelter Care, Arrange Legal Consultation, Arrange Service Delivery, Arrange Transportation, Arrange Visitation, Arrange/Refer Legal Consultation, Case Plan Development, Credit Results Reviewed with Youth, and Discuss Credit Counseling/Participation.
- Participants:** A list box containing "B. Marcia (18)", "B. Bobby (17)", "N. Alice (60)", "B. Mike (40)", and "B. Carol (39)".
- Buttons:** "OK", "Apply", "Cancel", and "Help".
- Wraparound:** An unchecked checkbox.
- Core Service:** An unchecked checkbox.
- Provider:** Radio buttons for "Staff Person" (selected), "Service Provider", and "Collateral". Below are radio buttons for "Substitute Care Provider" and a "Provider Name" dropdown menu set to "W. Chris".

4) Complete the “Schedule for Service” frame.

a) Occurrences must be “1” or more.

b) Frequency must be a minimum of “Every 3 Months.”

The screenshot shows the "Client Services - Case [B, Bobby] - [Case Plan [In Progress]]" application window. The "Planned Client Services" tab is active, displaying a table with the following data:

ID	Participant	Category	Service Type	Wraparound	Core Service
1	Marcia(18), Bobby(17), Alice(60), Mike(40), Carol(39)	Case Management Services	Child and Family Team		

Below the table, the "Schedule for Service" frame is expanded, showing the following details:

- Participants:** A list box with "B. Marcia(18)" selected.
- Service:** "Category" is "Case Management Services" and "Type" is "Child and Family Team".
- Schedule for Service:** "Start Date" is 05/15/2017, "End Date" is 11/13/2017, "Occurrences" is 1, and "Frequency" is "Every 3 Months".
- Provider:** "Staff Person" is selected, and "Provider Name" is "W. Chris".

A red arrow points to the "Frequency" dropdown menu in the "Schedule for Service" frame.

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### Contact Notebook: Documentation of Family Engagement Efforts Prior to Individual Child and Family Team (CFT) Meetings

County social workers and probation officers should meet individually with children, youth, nonminor dependents (NMDs), and families prior to the meeting to help them understand the CFT process and prepare them to participate in the CFT meeting. CFTs are more likely to be effective when children, youth, nonminor dependents, and families understand the process and their role in it. These **Family Engagement Efforts** prior to a CFT meeting must be documented in the Contact Notebook. **Note: If the meeting is held for an Emergency Response referral, enter the information in the Contact Notebook of the referral and follow the same instructions below.**

1. Create a new or update an existing contact with the following information:

- a. Staff Person
- b. Start Date, Time
- c. End Date, Time

The screenshot shows the 'Client Services - Case [B, Bobby] - [Contact [05/15/2017]]' window. The 'Contact Information' section is visible, with the following fields filled: Staff Person (W, Chris), Start Date (05/15/2017), Start Time (: am), End Date (05/15/2017), End Time (: am), Contact Purpose (Deliver Service to Client), Method (In-Person), Location (<None>), and Status (Completed). A dropdown menu for Location is open, showing options: <None>, Court, CWS Office, Home, In Placement, Other, and School. A red arrow points from the 'Home' option in the dropdown to the 'Location' field.

2. The fields at right should be completed as shown:

- a. Contact Purpose: Deliver Service to Client
- b. Method: In Person
- c. Location: In Placement or Home (*ideal*)
- d. Status: Completed (*required*)
  - i. Status must be recorded as "Completed"

3. Open "Select Participants" dialog box by clicking "+."

- a. Select all of the individuals who participated and click "OK."

The screenshot shows the 'Select Participants' dialog box open over the main software window. The dialog box has a 'Participant Type' dropdown set to 'Clients' and a list of names with ages: B, Bobby (16), B, Carol (38), B, Marcia (18), B, Mike (40), and N, Alice (61). The name 'B, Bobby (16)' is selected. Red arrows point from the '+' button in the 'Participants' section of the main window to the dialog box, and from the selected name in the dialog box to the 'OK' button.

4. Complete the Case Management Service/Referrals Frame

- a. Click on "+" to open the case management services list.

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b. Select “FEE-“Case Planning with Family.”

Enter the family engagement efforts in the Narrative field and click “OK.”

The Associated Services fields will be pre-populated.

### Contact Notebook Context: Individual CFT Meetings (CFTMs)

*Individual CFT meetings are in-person meetings, and at minimum include the identified child, youth, or nonminor dependent, family members, others identified by the family, the child’s current caregiver, and the assigned child welfare social worker and/or probation officer. If the child, youth, or nonminor*

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dependent also receives services from a community-based provider or other system, they should also be included in the CFT process.

### Documentation of Individual CFT Meetings

Individual CFT meetings must be documented in the Contact Notebook with an Associated Service. The meeting should address the needs of all the siblings whenever possible and the contact/meeting is on behalf of all siblings in the family. **If the meeting is held in Emergency Response, staff should enter the information in the Contact Notebook of the referral and follow the same instructions below.**

1. Create a new or update an existing contact with the following information:

- a. Staff Person
- b. Start Date, Time of CFTM
- c. End Date, Time of CFTM

2. The fields below should be completed as shown:

- a. Contact Purpose: Deliver Service to Client
- b. Method: In Person
- c. Location: In Placement or Home (*ideal*)
  - i. CFT meetings should take place in a convenient setting that maximizes family member participation.
- d. Status: Completed (*required*)
  - i. Status must be recorded as "Completed"

3. Open "Select Participants" dialog box by clicking "+."

- a. Select all of the individuals who participated in the CFT meeting and click "OK."
- b. A single contact for multiple siblings who were discussed at the CFTM may be created in the Contact Notebook using the "On Behalf of Child" dialog box. Only select the child as a participant if s/he was present at the CFTM.

4. Complete the Case Management Service/Referrals Frame

- a. Click on "+" to open the case management services list.

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The screenshot shows the 'Client Services - Case [B, Bobby] - [Contact [05/15/2017 ]]' window. The 'Contact Information' section is populated with the following data:

Staff Person	Start Date	Start Time	End Date	End Time
W, Chris	05/15/2017	: am	05/15/2017	: am
Contact Purpose	Method	Location	Status	
Deliver Service to Client	In-Person	In Placement	Completed	

The 'Participants' table lists the following individuals:

	Participants	Ag
1	A, Joy	
2	B, Bobby	17
3	B, Carol	39
4	B, Marcia	18
5	B, Mike	40
6	N, Alice	60
7	R, Barbara	

The 'On Behalf of Child' section shows:

1	B, Bobby	12
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The 'Contact Party Type' section shows:

1	Staff Person/Child
2	Staff Person/Collateral

The 'Case Management Services/Referrals' section shows a table with one entry:

+	Case Management Services/Referrals	Wraparound	Core Service
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A red arrow points from the 'Completed' status dropdown to the 'Case Management Services/Referrals' section.

b. Select "CM-Child and Family Team" and click "OK."

The screenshot shows the same software interface as above, but with a 'Select Case Management Services/Referrals' dialog box open. The dialog box contains a list of service options:

- CM-Adoption
- CM-Arrange ADA (Amer Disabilities Act) Svcs
- CM-Arrange and Maintain Placement
- CM-Arrange Bilingual Services
- CM-Arrange Emergency Shelter Care
- CM-Arrange Legal Consultation
- CM-Arrange Service Delivery
- CM-Arrange Transportation
- CM-Arrange Visitation
- CM-Arrange/Refer Legal Consultation
- CM-Case Plan Development
- CM-Child and Family Team** (highlighted)

At the bottom of the dialog box, there are two checkboxes:  Wraparound and  Core Service. On the right side of the dialog box, there are four buttons: OK, Apply, Cancel, and Help.

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5. Contact appears as shown:

The screenshot shows the 'Client Services - Case [B, Bobby] - [Contact [05/15/2017]]' window. The 'Contact Information' section is populated with the following data:

Staff Person	Start Date	Start Time	End Date	End Time
W, Chris	05/15/2017	: am	05/15/2017	: am

Contact Purpose: Deliver Service to Client  
Method: In-Person  
Location: In Placement  
Status: Completed

**Participants**

Participant	Count
B, Bobby	16
B, Carol	38
B, Marcia	18
B, Mike	40
N, Alice	61

**On Behalf of Child**

Child	Count
B, Bobby	12

**Case Management Services/Referrals**

Service	Wraparound
CM Child and Family Team	<input type="checkbox"/>

**Contact Party Type**

Party Type	Count
Staff Person/Child	1
Staff Person/Parent-Guardian	2

Narrative: [Empty text area]

### Contact Notebook

#### Context: Individual CFT Meetings as an Associated Service

Documentation of an individual CFT meeting is incomplete until an Associated Service has been attached to it. This documents the county agency responsible for convening the CFT meeting, and also records the Key Roles associated with those who attended.

### Contact Notebook

#### Add Individual CFT Meeting as an Associated Service

Individual CFT meetings must be added to a Contact as an Associated Service to document the Lead Agency involved and the Key Roles attending and participating in each meeting.

6. Click on the "Associated Services" tab.

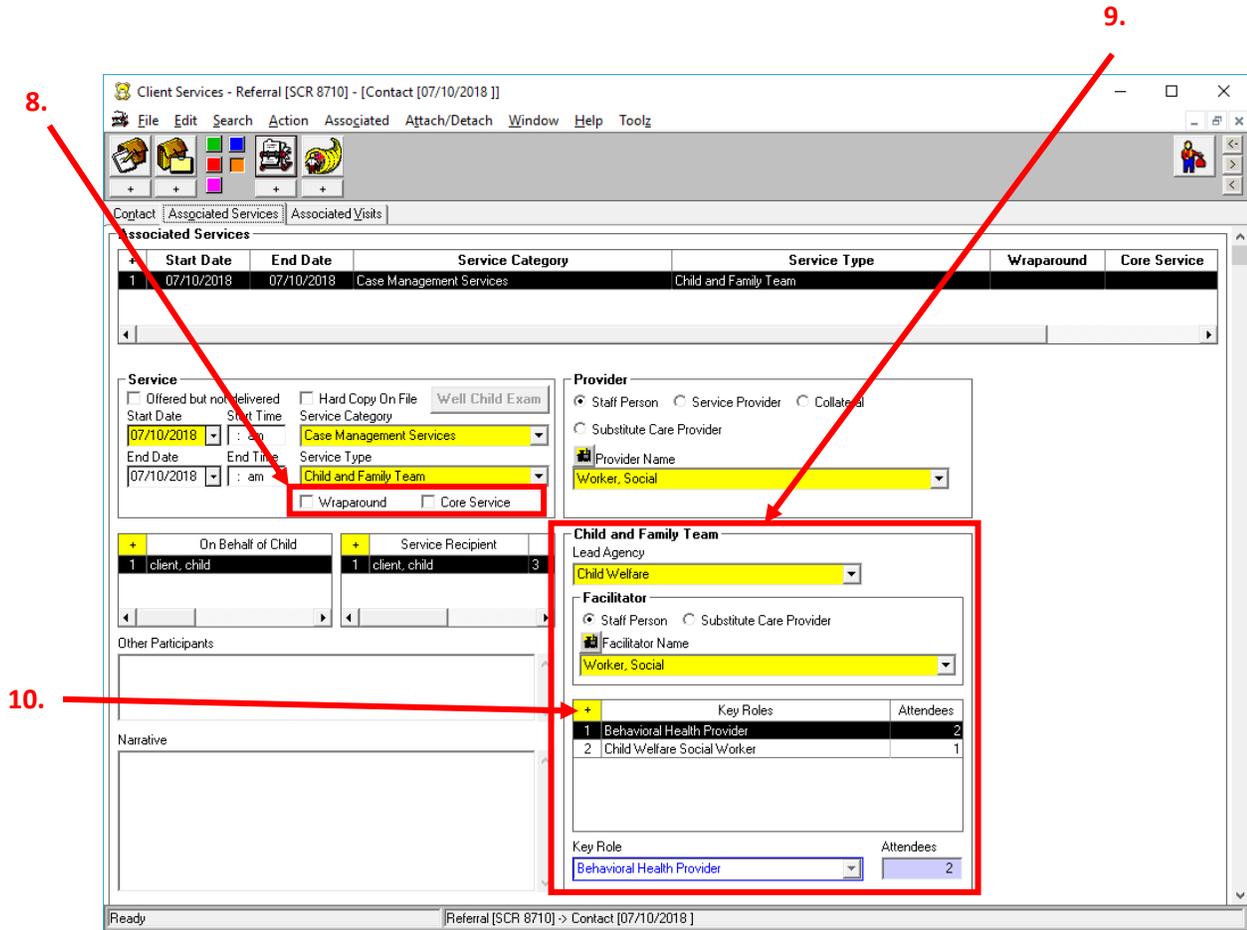
The screenshot shows the 'Client Services - Case [B, Bobby] - [Contact [05/15/2017]]' window with the 'Associated Services' tab selected. The 'Contact Information' section is populated with the same data as in the previous screenshot.

7. Most fields will be pre-populated.

8. When documenting CFT meetings that occur as part of the child's/youth's Wraparound plan, click the "Wraparound" checkbox in the Service frame. If a child or youth is receiving services that meet the definition of [Core Services \(WIC, Section 11463\(b\)\(5\)\(A-F\)\)](#), click the "Core Services" checkbox in the Service frame when documenting CFT meetings that occur as part of that Core Service.

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9. Complete the Child and Family Team frame by selecting the [Lead Agency \(see #12 for details\)](#), Facilitator Name and role (if staff person or substitute care provider), and [Key Roles information](#).



10. Click on the “+” to open the “**Key Roles**” dialog box. From list of available roles, select all of the Key Roles who attended the individual CFT meeting being documented.

a. Multiple roles may be selected, and several roles may have multiple attendees selected for each role (see table below). A single contact for multiple siblings who were discussed at the CFTM may be created in the Contact Notebook using the “On Behalf of Child” dialog box, and one (1) Associated Service may be used for all the siblings.

b. Key Roles are not assigned to particular individuals involved in the case. Each Key Role selected is recorded as having attended the specific CFT meeting being documented.

c. Select **Key Roles** according to the definitions shown in the following table:

Key Role at CFTM	Description
<p><b>a) Behavioral Health Provider*</b>  <i>Please always select this role for a representative of the county Mental Health Plan</i></p>	<p>Supports the child, youth, nonminor dependent, and family by bringing a trauma-informed, clinical perspective to the team about the mental health status of the child, youth, or nonminor dependent.</p>

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<b>b) Child</b>	The identified child, youth, or nonminor dependent (Note: only select if the child was present at the CFTM).
<b>c) Child Welfare Social Worker</b>	The assigned child welfare social worker of the identified child, youth, or nonminor dependent. This role was modified with CWS/CMS 8.4 to allow multiple attendees to be recorded.
<b>d) Clergy</b>	Any recognized representatives of a church or other faith organization.
<b>e) Court Appointed Special Advocate (CASA)</b>	An individual who advocates independently on behalf of a child, youth, or nonminor dependent, and is appointed by the court to ensure they live in an environment free from abuse and neglect.
<b>f) Education Partner</b>	Any representative of the identified child's school or academic achievement efforts.
<b>g) Education Rights Holder</b>	Person responsible for making education decisions in the child's best interests. The Education Rights Holder may be the child's parent, caregiver, legal guardian, or someone else appointed by the court. The Education Rights Holder cannot be the child's social worker, probation officer, attorney, STRTP/group home staff member, or school staff member.
<b>h) FFA Staff</b>	An individual from the Foster Family Agency that supervises the identified child or youth's placement.
<b>i) Natural Support*</b>	People or organizations identified by the child, youth, nonminor dependent, or family as important. Natural supports are a family's relationships and connections within their community, enhancing safety and diminishing loneliness and isolation. Examples include friends, neighbors, etc.
<b>j) Other Community Support*</b>	Individuals that an identified child, youth, nonminor dependent, or family may invite to be a team member, such as the youth's swim coach, girl scout leader, or softball teammate, for example.
<b>k) Other Family*</b>	Family members not reflected in one of the other roles.
<b>l) Parent Partner</b>	Individuals with lived experience who provide support and advocacy to parents whose children have been removed, helping them understand and navigate the system and encouraging them through the process.
<b>m) Probation Placement Officer</b>	The assigned deputy probation placement officer.
<b>n) Regional Center Provider</b>	Representatives of a Regional Center provider of developmental health services.
<b>o) Resource Parent*</b>	Substitute care provider.
<b>p) Short Term Residential Therapeutic Program Staff</b>	Representative from the STRTP where the identified child or youth resides.
<b>q) Therapist*</b>	The therapist providing services, but may also be used to mean any other mental health provider serving a child, youth, nonminor dependent and family.
<b>r) Tribal Representative*</b>	Representative from the identified child's, youth's, nonminor dependent's, or family's Native American tribe.
<b>s) Youth Partner</b>	Individual who works directly with the identified child, youth, or nonminor dependent to help them understand and navigate the process, and encourage them to participate and work with the team.
<b>t) Bio Father</b>	Birth father of the identified child, youth, or nonminor dependent. Do not use this role for a parenting youth or parenting nonminor dependent. (Note: The role of Parent/Father was deactivated with CWS/CMS 8.4).
<b>u) Bio Mother</b>	Birth mother of the identified child, youth, or nonminor dependent. Do not use this role for a parenting youth or parenting nonminor dependent. (Note: The role of Parent/Mother was deactivated with CWS/CMS 8.4).
<b>v) Facilitator</b>	The facilitator of a CFT meeting. This individual may be a service provider or a CWS/CMS staff person.

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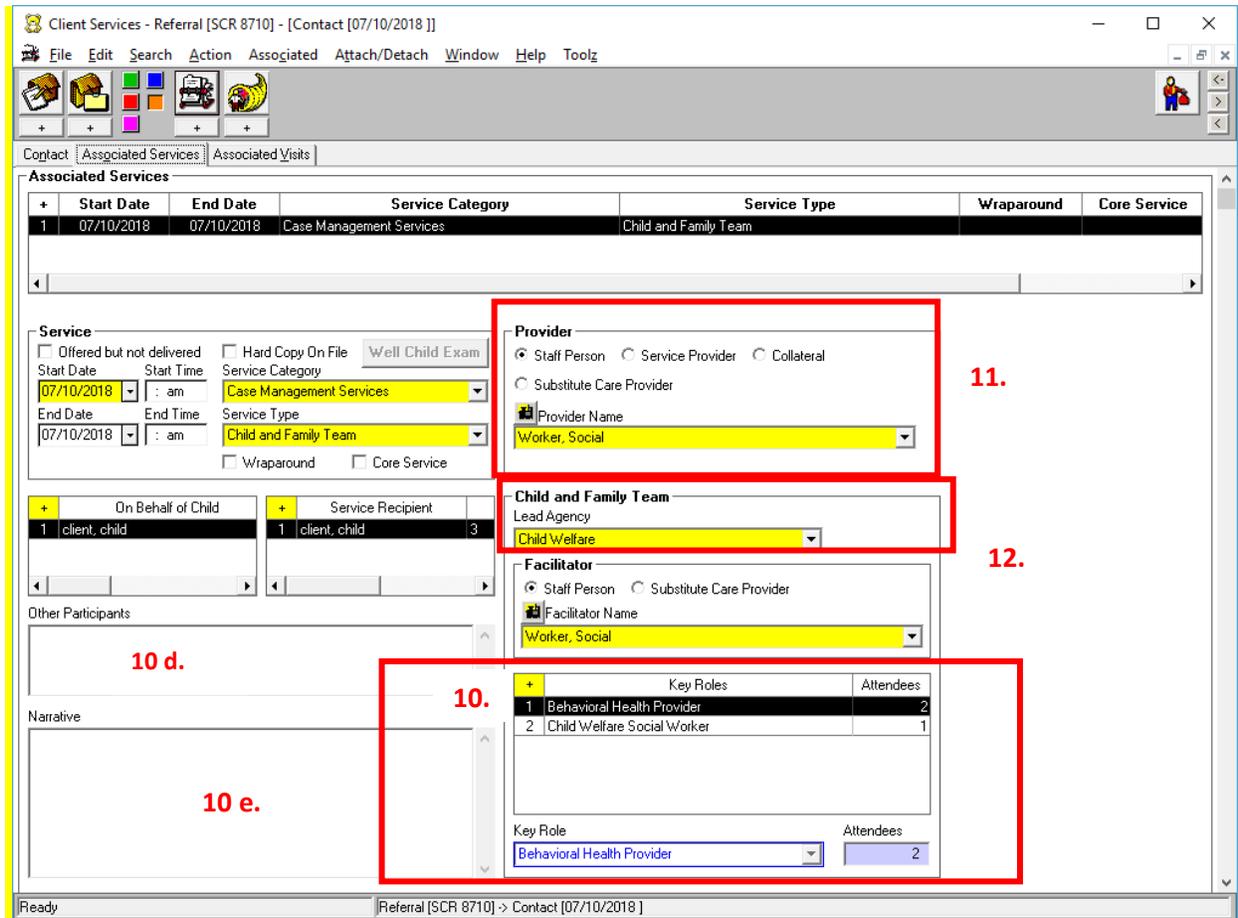
<b>w) Sibling*</b>	Sibling of the identified child. This role was modified with CWS/CMS 8.4 to allow multiple attendees to be recorded. Note: this key role does not apply to siblings on the “On Behalf Of” field; e.g., adult siblings
<b>x) Other Parent/Guardian*</b>	This role was modified with CWS/CMS 8.4 to allow multiple attendees to be recorded.
<b>y) Substance Use Disrdr</b>	This role was added with CWS/CMS 8.4.
<b>z) Trtmnt Professional*</b>	This role was modified with CWS/CMS 8.4 to allow multiple attendees to be recorded.
<b>aa) Supervisor</b>	The supervisor of the assigned child welfare social worker for the identified child, youth, or nonminor dependent. This role was modified with CWS/CMS 8.4 to allow multiple attendees to be recorded.

**\* The number of attendees for this role may be greater than one (1).**

*d. Anyone whose role at the CFT meeting is not identified in the list above may be added to the “Other Participants” dialog box ([see 10.d](#)). Other Participants will not be tracked.*

*e. A description of the content/topics of the CFT meeting, including family goals, tasks/action steps, non-negotiables and agreements, challenges/worries/needs, achievements/strengths, outcomes, etc., are added to the “Narrative” field ([see 10.e in below screenshot](#)). If the facilitator is a service provider or staff member who cannot be located in the search field, the narrative field can also be used to note if a service provider acted as a CFT Facilitator. **If a child/youth/NMD did not attend, indicate the reason.***

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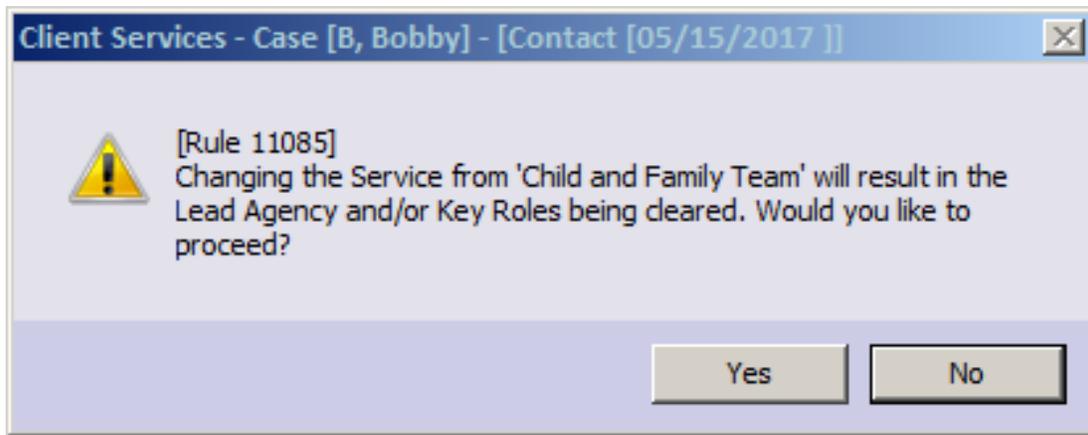
11. In the Provider frame ([see above screenshot, 11.](#)), select the CFTM provider in the Provider Name drop-down menu, and click the radio button corresponding to that individual’s role as a Staff Person, Service Provider, Collateral or Substitute Care Provider.

12. Select the “Lead Agency” (*county agency*) responsible for convening the CFT on behalf of the child/youth/NMD (select “Child Welfare” for foster care/dependency cases and “Probation” for probation/ delinquency cases).

**Please Note:**

*When working in the Associated Services tab, if the Service Type is changed to a value other than “Child and Family Team,” information entered in the “Key Roles” and “Lead Agency” fields will be cleared. A dialog box with the following message will be displayed:*

## CFTM Data Entry Instructions for CWS/CMS



### Local Reports and Documents Reflecting CFT Documentation:

#### Local Reports

##### 1. Case Plan, Individual Client Responsibilities

When documented in the Case Plan Notebook as described previously in this document, Child and Family Team planned services will appear on the Individual Client Responsibilities report in the Client Responsibilities section under Case Management Services.

#### Documents

##### 1. Case Plan & Case Plan Update (Agency Responsibilities)

Documentation of CFT as a Case Management Service in the Case Plan Notebook, as described on [page 1 of this document](#), will be reflected as an agency responsibility in the Case Plan and Case Plan Update documents. The information will appear in the Agency Responsibilities section, under Case Management Services.

2. **Case Plan & Case Plan Update (Client Responsibilities)** Documentation of CFTs as a Planned Client Service in the Case Plan Notebook, as described beginning on [page 2 of this document](#), will be reflected as a client responsibility in the Case Plan and Case Plan Update documents. The information will appear in the Client Responsibilities section, under Case Management Services.

##### 3. Delivered Service Log

A new checkbox has been added to the Delivered Service Select Filter when printing the Delivered Service Log. The checkbox is enabled when the "Services" box is checked. The Delivered Service Log will reflect CFTs as a service, and include the CFT Lead Agency and

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Key Roles – plus any narrative – that were documented in the Contact Notebook for each documented CFT meeting.

**Delivered Service Select Filter**

**Date Range**

From: 05/01/2017 To: 07/05/2017

**Delivered Service Log**

Do you want to print narrative?

<input checked="" type="checkbox"/> Contacts	<input checked="" type="radio"/> Yes	<input type="radio"/> No
<input checked="" type="checkbox"/> Visits	<input checked="" type="radio"/> Yes	<input type="radio"/> No
<input checked="" type="checkbox"/> Services	<input checked="" type="radio"/> Yes	<input type="radio"/> No
<input checked="" type="checkbox"/> CFT Lead Agency/Key Roles		