

ACCESSING OUT-OF-COUNTY REFERRAL/CASE RECORDS ON CWS/CMS

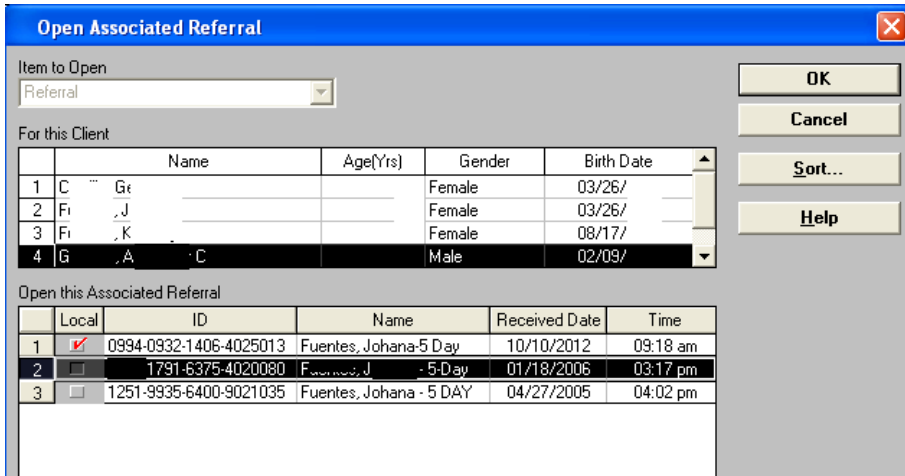
In order to access any client's out-of-county referrals/cases, it is necessary to have either primary or secondary assignment to any open referral/case to which the client in question is a participant. By having the primary or secondary assignment, staff can review any open or closed cases/referrals of any other county in the State for that client (the only exceptions being any case/referral that has been marked Sensitive or Sealed by the other county or any marked by Los Angeles County if you do not have the Sensitive or Sealed privilege).

You can access an associated case or referral by:

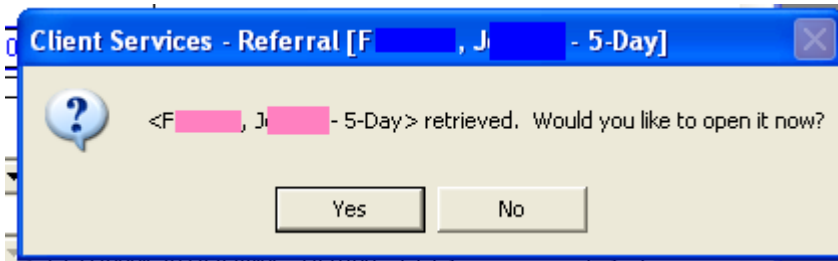
- 1) Open up the client's notebook within the case or referral to which you are assigned;
- 2) Click on either Open Associated Cases... or Open Associated Referrals... on the Associated Menu:

The screenshot shows the 'Client Services - Referral - Primary [F]' window. The 'Associated' menu is open, displaying options: 'Open Associated Referrals...', 'Open Associated Cases...', 'Open Associated Hearings...', and 'Open Associated Case Plan Documents...'. The client record for 'Alexander Guzman' is visible below, with fields for Name and Identification, Gender (Male), Marital Status, SSN, Alien Registration #, Date of Birth (02/09/), and Client Number (0693-7064-8253-6005345). The 'Race/Ethnicity' field is highlighted in green.

- 3) From the list of cases or referrals presented, select the appropriate row and then click on the OK button (if the OK button is grayed out, that indicates you cannot access that referral or case):



- 4) CWS/CMS will retrieve the case/referral and you can confirm whether or not you want to access the case/referral in question:



- 5) The case/referral will then appear on your workstation.