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;
- Click on either Open Associated Cases... or Open Associated Referrals... on the Associated Menu:

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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):

Open Associated Referral											
Item to Open	OK										
For this Client Cancel											
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Open this Associated Referral											
Local	ID	Name	Receiv	ed Date	Time						
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2 🗆	1791-6375-4020080	F	5-Day	01/18	1/2006	03:17 pm					
3 🗆 1	1251-9935-6400-9021035	Fuentes, Johana -	5 DAY	04/27	7/2005	04:02 pm					

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.