Opening a Case without a Referral in
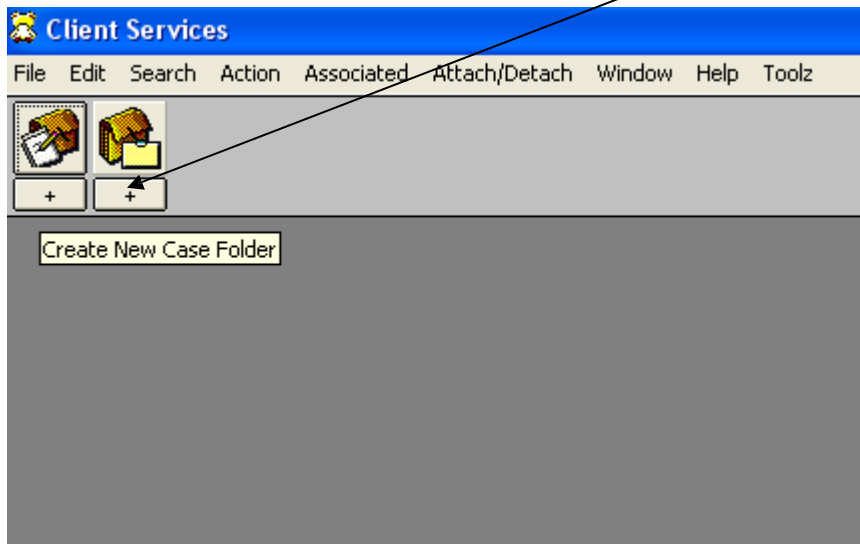
CWS/CMS You can open a case without a referral by:

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):
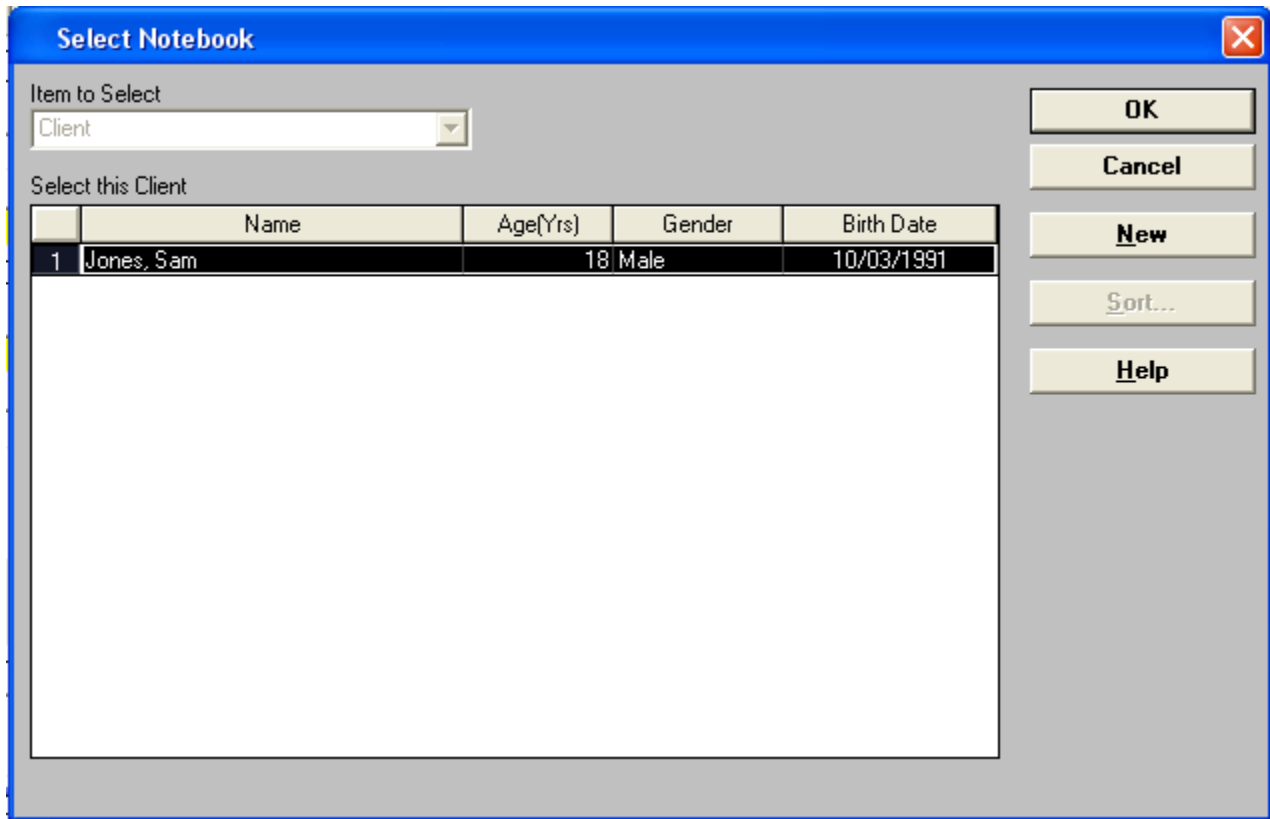
Select Notebook

Item to Select

Client

Select this Client

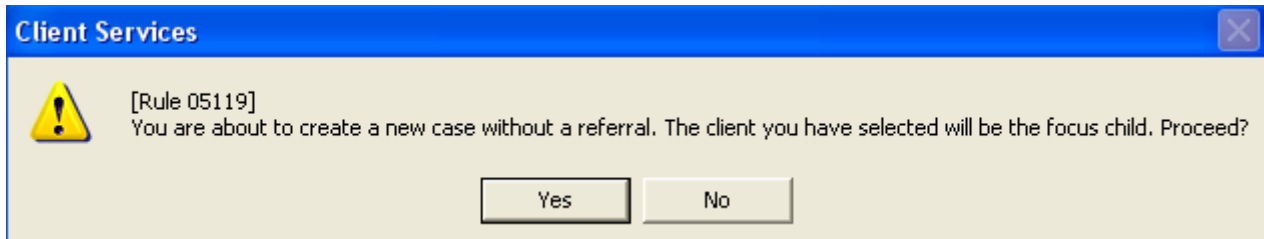|	Name	Age(Yrs)	Gender	Birth Date
1	Jones, Sam	18	Male	10/03/1991

OK
Cancel
New
Sort...
Help

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).
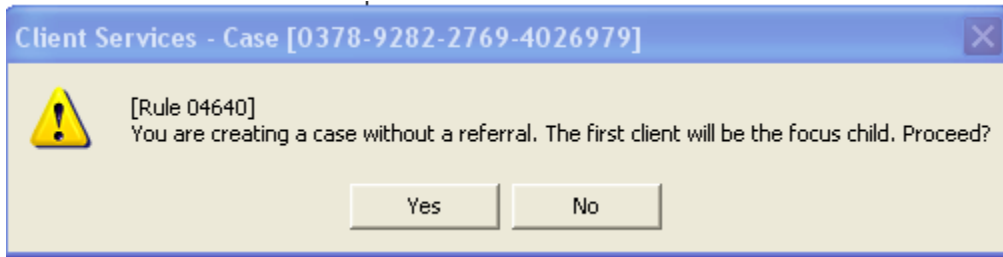
Select Notebook

Item to Select

Client

Select this Client

	Name	Age(Yrs)	Gender	Birth Date
1	Jones, Sam	18	Male	10/03/1991

OK
Cancel
New
Sort...
Help

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

Client Services

⚠ [Rule 05119]
You are about to create a new case without a referral. The client you have selected will be the focus child. Proceed?

Yes   No

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:

Client Services - Case [0378-9282-2769-4026979]

⚠ [Rule 04640]
You are creating a case without a referral. The first client will be the focus child. Proceed?

Yes   No

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).

PROBATE CASES

For Probate cases, ensure that the following fields are also completed with the following information:

Placement Notebook ID Page

"Probate NRLG" is selected for Legal Authority for Placement

Legal Auth.For Placement History

+	Legal Auth. For Placement	Effective Date
1	Probate NRLG	05/30/2017

Legal Auth. For Placement
Probate NRLG

Effective Date
05/30/2017

- This field is completed by the assigned Intake Eligibility Worker

"Guardian Home" is selected as the "Type" in the Placement Home Notebook.

- NRLG homes are created by the Resource Management Unit of the Revenue Enhancement Division after receiving RM 200 request from a TA

"Nonrelative Guardian" is selected as the Care Provider Relationship to Child

- This field is completed by the TA who processes the placement. The assigned intake or case-carrying EW may change it if it were completed inaccurately

Case notebook ID Page

"Voluntary" is selected as the status

- This field is completed by the SCSW opening the case

"Guardian Requesting FC Payment" is selected as the intervention reason

- This field is completed by the SCSW opening the case