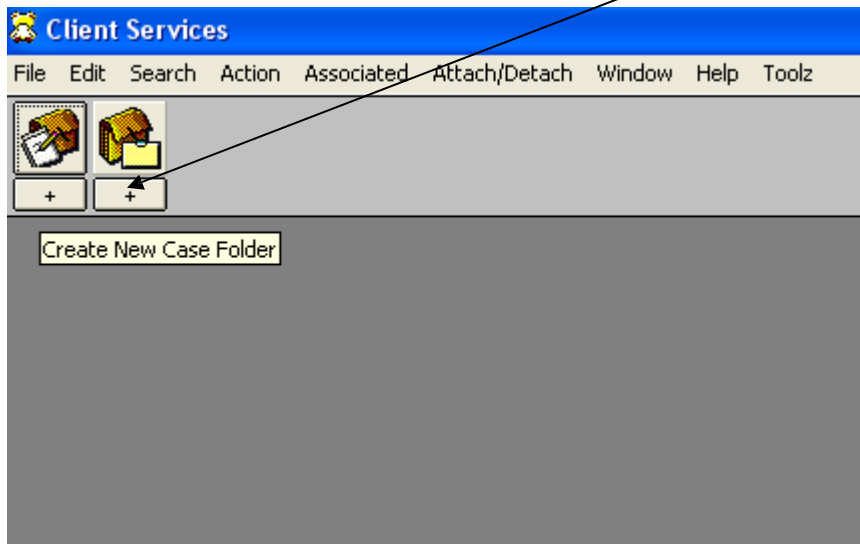


Opening a Case without a Referral in

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

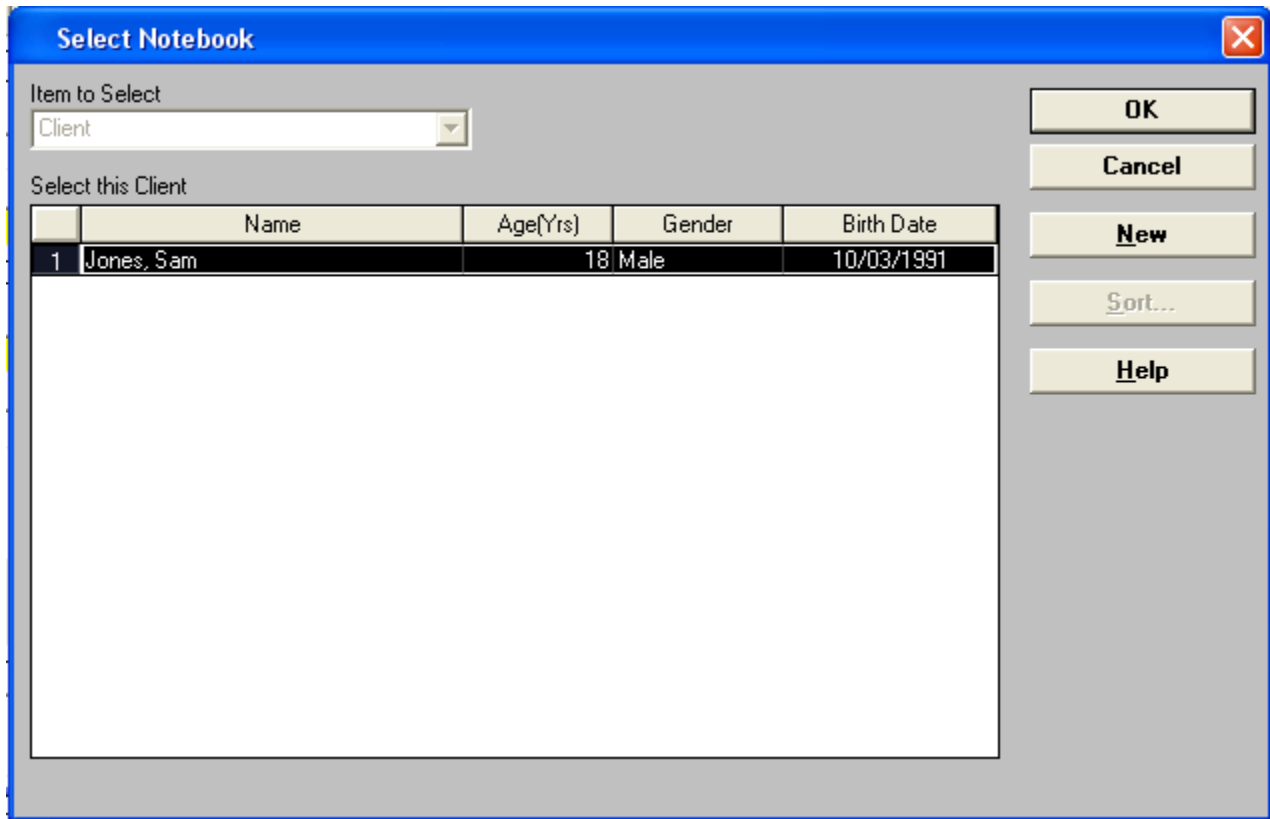
Select this Client

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

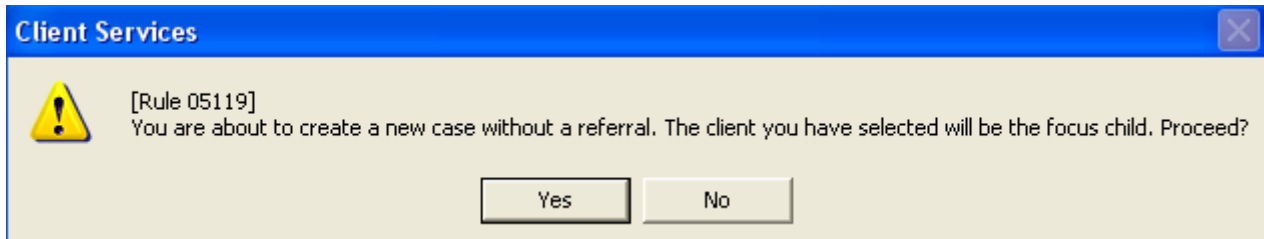
OK
Cancel
New
Sort...
Help

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).



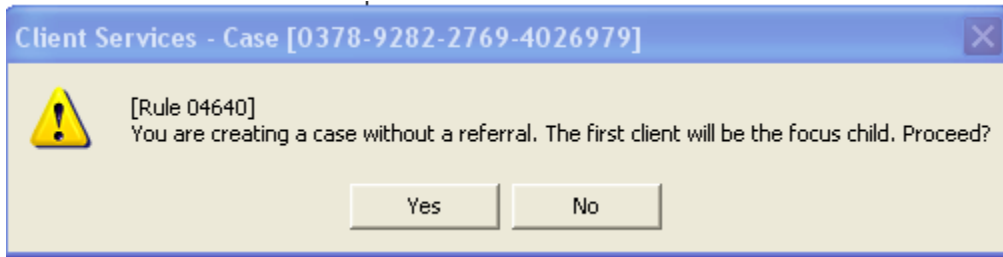


3) After clicking OK for an existing client, you will be presented with the following:



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).

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:

Effective Date:

- This field is completed by the assigned Intake Eligibility Worker

“Guardian Home” is selected as the “Type” in the Placement Home Notebook.

The screenshot shows a software interface with a toolbar at the top containing icons for a notebook, folders, colored squares, and various home and family icons. Below the toolbar are tabs for 'ID', 'Substitute Care Provider', 'Other Children', and 'Other Ad'. The main section is titled 'Identification' and contains the following fields:

- Name: LANITA
- Type: Guardian Home (highlighted in blue)
- Foster Family Home Type: (empty dropdown)

- 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

The screenshot shows a software interface with a toolbar at the top containing icons for a notebook, folders, colored squares, and various home and family icons. Below the toolbar are tabs for 'Child Removal Info', 'ID', 'Ongoing Requests', 'Incidental Payments', 'End Placement/Episode', 'Temporary Leave', and 'Relative/N'. The main section is titled 'Identification and Approval' and contains the following fields:

- Start Date: 06/28/2006
- End Date: (empty dropdown)
- Agreement Effective Date: 06/28/2006
- Agency Responsible: County Welfare Department
- Placement Home: LANITA
- Facility Type: Guardian Home
- Care Provider Relationship To Child: Nonrelative Guardian (highlighted in yellow)

- 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

Case Status

+	Status	Effective Date	End Date
1	Voluntary	06/11/2015	

Status

Court Involvement

Voluntary

Effective Date

06/11/2015

End Date

- This field is completed by the SCSW opening the case

“Guardian Requesting FC Payment” is selected as the intervention reason

United States

Intervention

+	Reason
1	Guardian Requesting FC Payment

Primary Agency Responsible

County Welfare Department

- This field is completed by the SCSW opening the case