

**STATEWIDE AUTOMATED CASE MANAGEMENT SYSTEM  
(CWS/CMS)**

**REFERENCES**

Hayes, M. (2006). Child Welfare Services/Case Management System New System Project Presentation. Retrieved on July 16, 2009 from [http://www.hwcws.cahwnet.gov/NewSystem/Project\\_Info/111506\\_New\\_System\\_Project\\_Regional\\_Presentation.pdf](http://www.hwcws.cahwnet.gov/NewSystem/Project_Info/111506_New_System_Project_Regional_Presentation.pdf)

(K1a, K2e)

About the study/citation-

This is a presentation on CWS/CMS and a new system project at the time this was produced. Information provided includes background, business needs addressed, benefits and project organizations.

Findings/content-

❖ Background

1. Increase in programmatic expectations has resulted in an increased user expectation of what CWS/CMS should provide.

2. California Department of Social Services (CDSS) considers CWS/CMS as a tool for the support of the child welfare workforce. The focus of its use is to:

•Allow more time spent providing services to children and families

•Contribute to recruitment and retention of staff

•Improve the quality/quantity of child welfare services which will result in improved outcomes for children and families

❖ Business needs addressed include adoption case management, Title IV-E eligibility determination, document storage, standardized reporting, improved remote access methods, and interfaces for information exchange.

❖ Technical strategy for updated system:

A fully Statewide Automated Child Welfare Information System (SACWIS) compliant New System using a web services-based technical structure which provides:

- The best solution to address current and future needs for delivery of child welfare services.
- A technical strategy to meet the needs of county, state, and federal stakeholders
- Automation of routine activities, such as documentation and reporting.
- Support for complex tasks, such as foster care placements and case planning)

### Implications for CWS-

Workers needs to understand the use of CWS/CMS and how improves their case management needs. CWS/CMS and updates can improve worker productivity and better quality documentation.

Smith, V. (2005). CWS/CMS Training Guide-Contact Notebook (Santa Clara County). Retrieved on July 16, 2009 from [http://www.sccgov.org/ssa/opp2/08\\_juvenilecourt/ documents/contact\\_train.pdf](http://www.sccgov.org/ssa/opp2/08_juvenilecourt/documents/contact_train.pdf)

(K1a-g, K2a-i)

### About the study/citation-

This citation provides information from a training guide for CWS/CMS. Information provided includes what kind of information is entered into the system and how to enter such information.

### Findings/content-

- ❖ The three pages of the contact notebook included are the contact page, associated services page and associated visits page.
  1. Contact page is the basic foundation for all contacts.
  2. Associated service page is used by staff to document services provided by CWS staff and outside providers.
  3. Associated visits page is used by staff to document visits, whether attempted or completed. The entries can be for supervised and unsupervised visits, including visits supervised CPS, outside providers or caretakers.
- ❖ The tasks covered in the notebook are: Creating new contacts, creating new associated services, creating new associated visits, associating and creating service providers, associating and creating collaterals, retrieving an existing contact,

associated service or associated visit, printing contacts, mandatory contacts/SW plan contacts, mandatory contacts for children placed out of state, and contact waivers and visitation exceptions. For the instructions for each task, there is a pictorial and written directions.

❖ The following is an example of the directions provided in this notebook. These are for how to print reports:

- 1) On the menu bar, select **[File, Print Report]**.
- 2) A dialog box appears, **'Print Report'**. Set the options to the following:
  - a) Area of Interest = **"Services Reports"**
  - b) Report Name = **"Delivered Service Log"**.
- 3) Select **[Print Preview]** and A dialog box appears, **'Select Folder'**.
- 4) Under **'Item to Select,'** click on the down arrow and indicate if you are working in a Case or a Referral.
- 5) Select **[Load]**, then **[OK]**.
- 6) Select the appropriate case, then click **[OK]** and a dialog box appears, **'Select On Behalf Of'**.
- 7) Select the children for whom you want to print information, then click **[OK]** and a dialog box appears, **"Delivered Service Select Filter"**.
- 8) Select the **From** and **To** date range
- 9) Check all the items that you want to print
  - a) Contacts Services and/or Visits
- 10) Select **'Yes'** to print the corresponding narrative(s).
- 11) Then click **[Apply]** and the **'Select Participants'** dialog box appears.
- 12) Select the appropriate Report Sort Option
  - a) **Descending** (most recent date entries on top typically used).
- 13) Participant Filter:
  - a) Typically we leave this field blank, however you can enter a name if you want to filter.
- 14) Select **[OK]** and CWS/CMS will generate the Delivered Services Log.
- 15) In Word, select **[File, Print]** print the document.
- 16) In Word, select **[File, Close]** and then **Minimize Word** to return to CWS/CMS.
- 17) In CWS/CMS, don't forget to **[Save to the Database]**.

### Implications for CWS-

The worker should understand how to enter data into CWS/CMS. Entering data into CMS/CWS can provide a means for more accurate data entry and record keeping as well as improved time management for the worker.

2009 from [http://74.125.155.132/search?q=cache:o5xOreFqhtoJ:www.hwcws.cahwnet.gov/Training/NewUser/Curriculum/Misc/\\_01\\_IntroCWS\\_CMS.doc+CWS/CMS+training+notebook&cd=1&hl=en&ct=clnk&gl=us](http://74.125.155.132/search?q=cache:o5xOreFqhtoJ:www.hwcws.cahwnet.gov/Training/NewUser/Curriculum/Misc/_01_IntroCWS_CMS.doc+CWS/CMS+training+notebook&cd=1&hl=en&ct=clnk&gl=us)

(K1a-g, K2a-i)

### About the study/citation-

This module provided an overview of the CWS/CMS system. There are many CWS/CMS principles and tools which are included in this student guide. This module introduced the following topics:

- CWS/CMS features
- CWS/CMS terms
- CWS/CMS computer network structure and system security
- Start up and use of the CWS/CMS Control Panel
- The CWS/CMS application screen
- Information structure within CWS/CMS
- A description of the CWS/CMS applications
- Basic navigation through CWS/CMS
- Common CWS/CMS commands and tools
- CWS/CMS helpful resources

### Findings/content-

❖ The following list describes some CWS/CMS features:

#### System-Wide Access to Information

- System-wide tracking of clients receiving child welfare services
- System-wide tracking and access to all referrals and cases

#### Automation of Everyday Tasks

- Automated tracking and selection of available child placements
- Automated system-wide generation of CWS reminders

#### Ease of Use

- Flexibility in the order of viewing and recording information
- Flexibility in office configurations and authority level structures

- ❖ The following are some of the terms for CWS/CMS that are described in the guide:
  - “Documents” - official papers that can be generated from CWS/CMS data to meet court, review, and State/Federal documentation requirements. Documents are permanently saved.
  - “Enabled” or “Available” Command, Field, or Button - available to enter data or to perform a certain task
  - “Field” - contains information
  - “Folders”, “Sections”, “Notebooks”, “Pages” - how the CWS/CMS applications organize data
- ❖ The CWS/CMS System provides for data security as required by federal and state laws. The following are security measures for CWS/CMS:
  - Data backup
  - Physical security and limited access to the location
  - Extensive access permission checking
- ❖ CWS/CMS organizes information in the following manner:
  - Control panel
  - Applications
  - Folders
  - Sections
  - Notebooks
  - Pages
  - Fields
- ❖ Brief application descriptions are provided, such as:

Resource Management



Figure – ICC 020

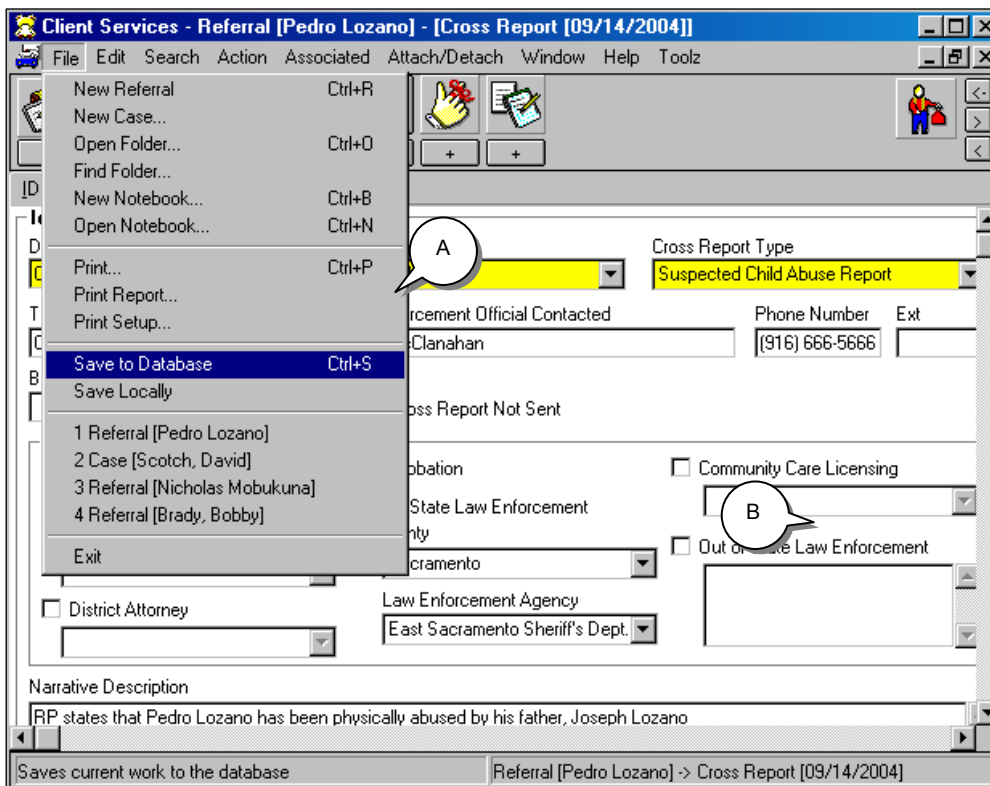
The Resource Management application allows CWS/CMS system administrators, county administrators, and office administrators to do the following:

- Manage internal organization information (e.g., CWS offices, assignment units, staff transfers)
- Manage external organization information (e.g., law enforcement agencies)
- Manage placement facility information (e.g., placement facility license status)
- Manage system information (e.g., code tables)

❖ Common commands and tools:

The Save to Database command closes all the folders and notebooks in current work and saves the data to the CWS/CMS database.

- To save work to the database, (A) select Save to Database from the file drop-down menu. In the Save Options dialog box, click (B) Continue Working to complete your save to the database and continue working in CWS/CMS. Click (C) Exit CWS/CMS to complete your save to the database and exit CWS/CMS. Click (D) Cancel to cancel your save to the database. If you chose to complete your save to the database, the (E) Save Status box will indicate your progress.



❖ CWS/CMS resources:

When a staff person runs into difficulty using CWS/CMS, there are many helpful resources available to them.

- Online Help files - These files offer descriptions of each CWS/CMS tool and explain how to use each one.
- Local (County) Help Desk. The Local CWS/CMS Help Desk provides telephone and/or in person support to CWS/CMS users. It helps to solve software and hardware problems. When problems cannot be solved, it helps CWS/CMS users report them to the CWS/CMS Help Desk in Boulder, CO.

- Navigation Toolz (Toolman)- These tools provide step-by-step assistance with Case/Referral Overview, Case Plan, AFCARS, End Case, End Placement, and can also provide an overview of the case or referral which is being worked on.
- Statewide Training Application Resource (STAR) - offers interactive training and short learning activities on many CWS/CMS functions. It is housed under the Training tab of the CWS/CMS web site <http://www.hwcws.cahwnet.gov/Training>

### Implications for CWS-

The worker should be aware of the benefits of CWS/CMS. Some of these include providing many routine functions and ready access to comprehensive, accurate, and timely information as required by state and federal child welfare laws and policies. CWS/CMS is considered to improve the productivity of child welfare services workers.

State of California, Child Welfare Services/Case Management System (2007).  
SOW0601 Training Region, SOW0601 WP B.2, CWS/CMS Training Region Guidelines (version 1.0). Retrieved on July 20, 2009 from [http://www.hwcws.cahwnet.gov/Training/Regions/061207\\_Training\\_Region\\_Guidelines\\_v1\\_0.pdf](http://www.hwcws.cahwnet.gov/Training/Regions/061207_Training_Region_Guidelines_v1_0.pdf)

(K1a, c, f)

### About the study/citation-

The purpose of this document is to provide an expansive overview of the use and set-up of the Training Region for CWS/CMS.

### Findings/content-

- ❖ The Training Region allows participating counties to administer training in a production-like environment where social workers, support staff, and others can be trained on the use of the CWS/CMS Application. The Training Region is maintained at code levels that match the production CWS/CMS Application, and it offers flexibility for each participating county to access county-specific information and resource data. In this environment, users are permitted to enter, add and delete data, and navigate as they would in the production environment without altering real data.
- ❖ The following is an overview of the requirements and processes a county needs to follow to request and install the training environment:
  - The county must complete and submit a price quote request to Office of Systems Integration (OSI) using the CWS/CMS county funding process.
  - The county must complete an Advance Planning Document (APD) for the funding request and obtain OSI approval and a purchase order for the server.
  - The county or IBM must evaluate the adequacy of the local network. IBM's assistance must be requested through the existing CWS/CMS Moves, Adds, Changes (MAC) process.
  - The county must install a new OSI circuit and router for the training site.

- The county must work with OSI to add the new training site to the DTS network.
  - The county must procure a training server in agreement with the currently published minimum server requirements.
  - IBM will install and configure the server. The county must open a MAC request under the CWS/CMS program for the installation and configuration of the training server.
  - The county must request access to Training Region host services through the State project manager.
  - The county must identify training workstations that will be used in training.
  - The county must install and configure each training workstations. The county can install their workstation images or request that IBM offer assistance with the installation. IBM's assistance must be requested through the existing CWS/CMS MAC process.
- ❖ The 16 counties currently using the Training Region, as well as the State of California, are listed below:
- County Number of Servers-**  
 Contra Costa 1, El Dorado 1, Fresno 1, Humboldt 1, Los Angeles 2, Mendocino 1, Monterey 1, Northern Region 1, Orange 1, Riverside 1, San Bernardino 1, San Diego 2, San Francisco 1, Santa Clara 1, Sonoma 1, Yuba 1, and State of California 1.
- ❖ The following activities take place during the three-day session and involve the creation of a *Virtual County* and the related CWS offices, units, caseloads, staff persons, resources, related organizations, placement facilities, cases, etc.
- Day 1
- Training Region Guidelines:
    - Present the characteristics of a Training Region.
    - Describe functionality of rollback ID.
    - Define ongoing support for the Training Region.
    - County Organization, Related Organization and Placement Facilities Assessment:
      - Identify existing county specific Resource Management material and the resources may need to be created to meet training objectives.
      - Design and document the Virtual County of CWS offices, assignment units, caseloads, staff persons and placement homes, level of authority and privileges, etc.
- Day 2
- Resource Management Database Entry and Set-up:
    - CWS Offices
    - Assignment Units
    - Caseloads
    - Staff Persons
    - Placement Homes
    - Attorneys
    - Law Enforcement Agencies
    - Government Agencies
    - Special Projects

- Client Services and Curriculum Assessment:
- Skill Building Exercise Documentation
- Referral/Case Documentation
- Service Provider Documentation

### Day 3

- Work with county staff to enter and set up a sample, customized set of cases and referrals into the Virtual Training Region database. The activities described above are a recommended listing of tasks. Depending upon specific county requirements, actual tasks and duration will be planned and performed at the direction of the county management and staff, in collaboration with IBM Global Services personnel. However, the activities described must be completed within three (3) contiguous days.

### Implications for CWS-

In order to practice and understand the process of CWS/CMS, the worker should be aware of the Training Region guidelines and what activities will be learned with that training application.