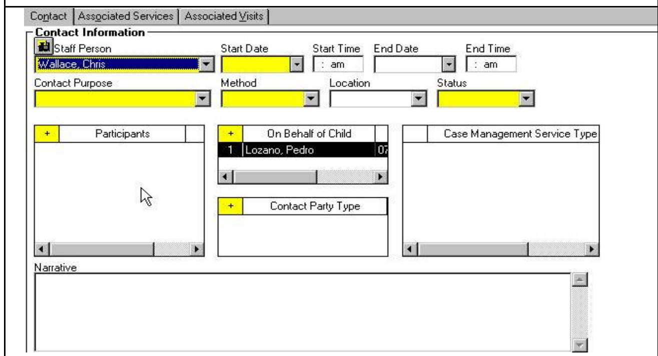
CWS/CMS TRAINING GUIDE

CONTACT NOTEBOOK

3 PAGES OF CONTACT NOTEBOOK

<table>
<tr>
<td>Contact Page</td>
<td>Associated Services Page</td>
<td>Associated Visits Page</td>
</tr>
<tr>
<td>
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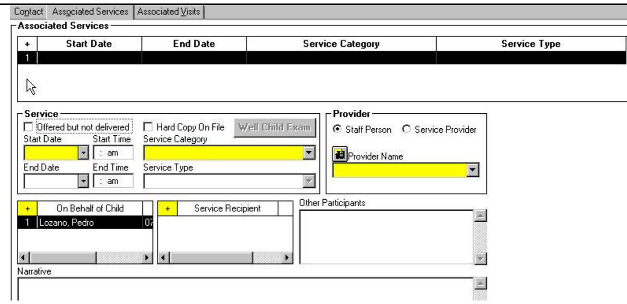
<td>
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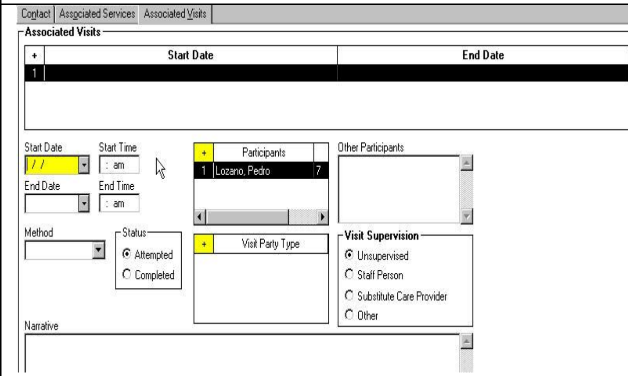
<td>
</td>
</tr>
<tr>
<td>This page is the basic foundation of all contacts and the yellow fields must be completed.

If you plan to enter information on the Associated Services and Visits pages, you must enter [Completed] in the status field on the Contact page.

Although it is not mandatory (yellow), you should make it a habit to complete the “Case Management Service Type” box with all of the services provided by a specific contact.</td>
<td>This page is used by staff to document services provided by DFCS staff and outside Service Providers (i.e. Drug Counselors, Parenting Instructors, Medical Providers, and Therapists).

Currently, the CHDP Public Health Nurses use this page to enter CHDP information from Medical Providers.

If this page is used correctly, workers can print a list of all the services provided to a family in a given time period (i.e. a reasonable efforts log).

**At this time, we do not require workers to input information on this page.</td>
<td>This page is used by staff to document visits (attempted or completed) between the children and their parents, grandparents, relatives, and/or siblings.

The entries can be for:
• Supervised or unsupervised visits
• Visits supervised by DFCS staff, outside service providers, or caretakers

If this page is used correctly, workers can print a list of all the visits offered to a family in a given time period (i.e. a visitation log).

**At this time, we do not require workers to input information on this page.</td>
</tr>
</table>

STEPS AT A GLANCE

STEPS AT A GLANCE

SECTION 1:
CREATING NEW CONTACTS

1. What is a CWS/CMS Contact?

a) It is a location to document case activities for all clients, service providers, and collaterals involved in a case.
b) Contacts are the official record of work done on the case.

2. What is the Contact Page used for?

a) This page is the basic foundation of all CWS/CMS contacts and the yellow fields must be completed.
b) If you plan to enter information on the Associated Services and Visits pages, you must enter **[Completed]** in the status field on the Contact page.
c) Contacts should be accurate, based on fact, complete, concise, current, and dated.

3. Contacts are mandated by law and the court. They are also a form of good social work practice:

a) Mandatory Contacts are reviewed by the state electronically
- In order to comply with Division 31 Regulations of the Welfare and Institutions Code and AB 636, we must enter all mandatory contacts in CWS/CMS.
- Include contacts between the Social Worker and children, parents (who receive services), and substitute care providers (caretakers).

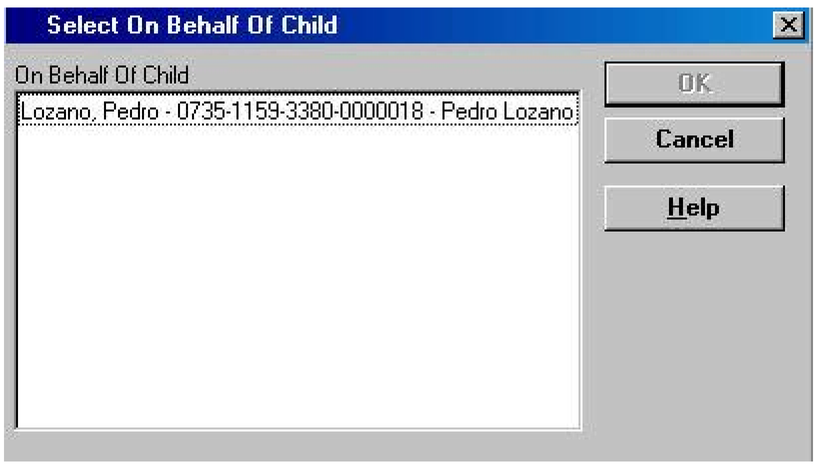
b) Court
- Include contacts between the Social Worker and children, parents (who receive services), and substitute care providers (caretakers).
- Included court ordered visits between children and their parents, siblings, and relatives.
- Reasonable Effort Services – The Social Workers efforts to locate services for the clients and provide appropriate referrals should also be documented in the contacts.
- Discovery – When the Court subpoenas your documentation for trial. Your contacts can be used as evidence in Court.

c) Documentation of contacts are a matter of good social work practice
- Contacts are a record of the work completed on a case and the services provided to the clients
- Contacts can be used as reference when writing court reports or needing to retrieve historical case information
- Contacts are also a primary data source for the O.D. or the Supervisor when a worker is not available.

4. Contacts can be any interaction, communication, or service involving or on behalf of a client, including:

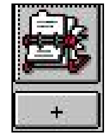
- Phone calls
- In-person interactions (no matter the location)
- Services that the Social Worker or another person is providing
- E-mail correspondence
- Fax (sent or received)
- Written correspondence

SELECT ON BEHALF OF CHILD(REN)



STEP 1 Section 1

Service Management Section (Orange)

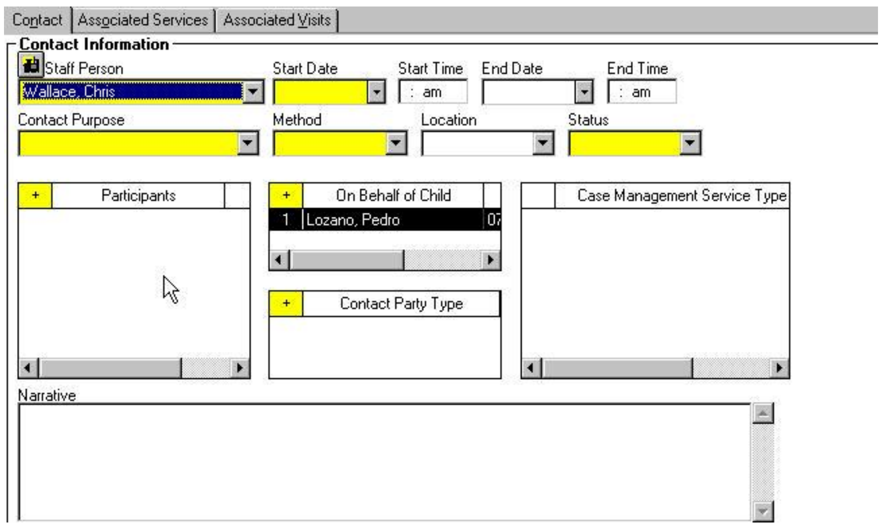
1)  Click the plus **[+]** to 'Create New Contact'.

2) A dialog box will appear, **"Select On Behalf of Child"**.

3) Select the children for whom this contact is pertaining (controls which child's CWS/CMS case will have a copy of the contact).

4) Click **[OK].** The Contact Notebook will open the Contact Page (1st page).

CONTACT PAGE



This page is the <u>basic foundation of all contacts</u> and the yellow fields must be completed.

STEP 2 Section 1

<u>Contact Page Fields:</u>

1) Staff person (DFCS person present for the contact)
2) Start Date and End Date (required for mandatory contacts)
3) Start Time and End Time (optional, helps control print order)
4) Contact Purpose
5) Method
6) Location
7) Status (completed, attempted, or scheduled)
8) Participants (include clients, collaterals, service providers, current caretaker, and others)
9) On Behalf of Child (controls which child's CWS/CMS case will have a copy of the contact)
10) Contact Party Type (please verify accuracy)
11) Case Management Service Type (corresponds with Case Management Services in Case Plan and is a record of services provided)
    a) Mandatory Contacts are coded as **"SW Plan Contact"**
    b) Visitations are coded as **Arrange Visitation**
    c) This information automatically populates to the 'Associated Services' page.
12) Narrative (holds up to 8,000 characters) -- **Spell Check and Sign Entry**

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SECTION 2:
CREATING NEW ASSOCIATED SERVICES

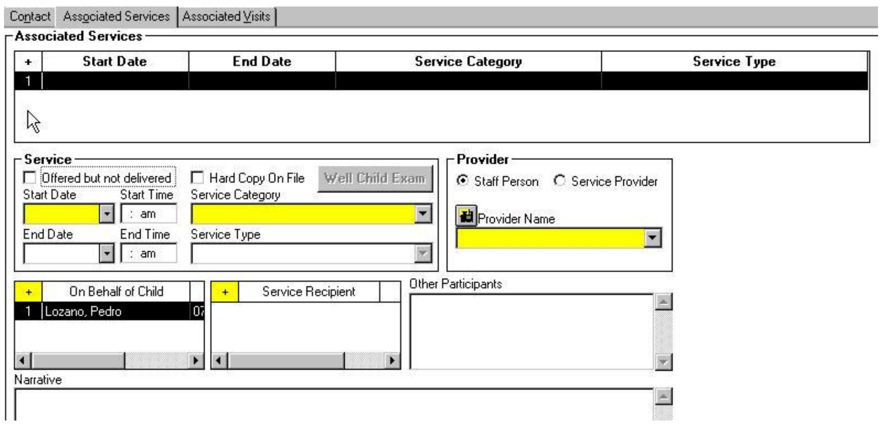
1) What are Associated Services?

a) These are all the services provided to clients.
b) They are associated in CWS/CMS to specific entries on the Contact Page.
c) Examples of Associated Services would be medical, therapy, and drug treatment appointments, parenting classes, Independent Living Plan Services, and referrals to services.
d) When workers complete the "Case Management Services Type" field on the Contact Page, the information automatically populates to the Associated Services Page.
e) To record services offered by outside providers, the DFCS staff person would record information on the contact page and then complete the Associated Services Page with the details of the service.

2) How do I enter information about an Associated Service?

a) First, you must complete all mandatory information on the Contact Page, including that the contact was completed.
b) Second, you may enter information on the Associated Services Page.

ASSOCIATED SERVICES PAGE



Services that were initially entered in the "Case Management Service Type" field on the Contact Page will automatically populate to this page.

STEP 1 Section 2

To record services provided by Service Providers (i.e. Drug counselors, parenting instructors, medical providers, and therapists):

<u>Contact Page</u>

1) Complete all yellow (mandatory) fields and enter **[Completed]** in the "Status" field.

<u>Associated Services Page</u>

2) To add services, click the **[+]** in the top of the grid and then complete the corresponding fields below.
3) To edit or add additional information to a service that already exists on this page, click on the specific row in the top grid and update the corresponding fields below.

<u>Associated Services Page Fields:</u>

1) Services Offered but not delivered
2) Hard Copy on File (for records filed in the case)
3) Start Date and Start Time (of the service)
4) End Date and End Time (of the service)
5) Service Category (corresponds with Planned Client Services in Case Plan)
6) Service Type (corresponds with Planned Client Services in Case Plan)
7) Provider (either a staff person or outside service provider)
8) On Behalf of Child (which children benefited from the service)
9) Service Recipient
10) On Behalf of Child
11) Other Participants
12) Narrative (holds up to 8,000 characters) – **Spell Check and Sign Entry**

SECTION 3:
CREATING NEW ASSOCIATED VISITS

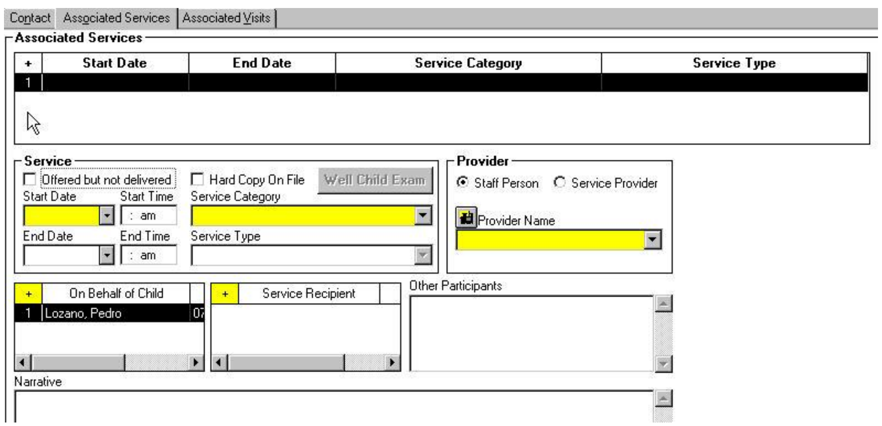
1) What are Associated Visits?

a) They are a record of client visits.
b) They are associated in CWS/CMS to specific entries on the Contact Page.
c) Examples of Associated Visits would be visits between children and their parents, siblings, grandparents, friends, and other critical family members.
d) To record visits supervised by outside providers, the DFCS staff person would record information on the contact page and then complete the Associated Visits Page with the details of the visit.

2) How do I enter information about an Associated Visit?

a) First, you must complete all mandatory information on the Contact Page, including that the contact was completed.
b) Second, you may enter information on the Associated Visits Page.

ASSOCIATED VISITS PAGE



STEP 1 Section 3

This page is used to document visits (attempted or completed) between the children and their parents, grandparents, relatives, and/or siblings (i.e. Clover House Visits).

To record visits for children and their family:

Contact Page

1) Complete all yellow (mandatory) fields and enter **[Completed]** in the "Status" field.

Associated Visits Page

2) To add services, click the **[+]** in the top of the grid and then complete the corresponding fields below.
3) To edit or add additional information to a service that already exists on this page, click on the specific row in the top grid and update the corresponding fields below.

Associated Visits Page Field Names:

1) Start Date and Start Time (of the visit)
2) End Date and End Time (of the visit)
3) Method (Email, Fax, In-Person, Telephone, or Written)
4) Status (Completed or Attempted)
5) Participants (clients and participants related in CWS/CMS)
6) Visit Party Type (you may choose multiple items)
7) Other Participants (Persons not related to the client in CWS/CMS)
8) Visitation Supervision (Supervised by whom?)
9) Narrative (maximum 8,000 characters) – Type the visitation narrative. **Spell Check and Sign Entry**

SECTION 4:
ASSOCIATING AND CREATING SERVICE PROVIDERS

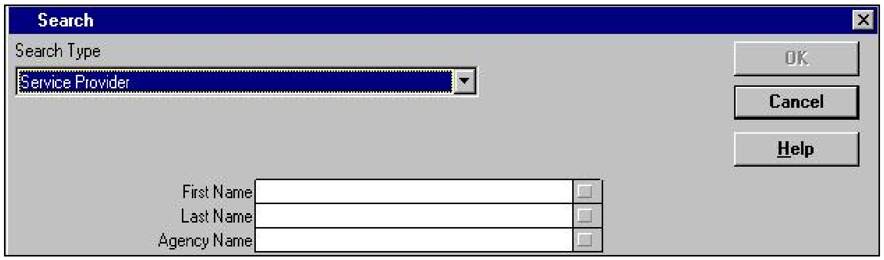
1) **Who are CWS/CMS Service Providers?**
   a) Individuals and agencies who provide services for and to clients.
   b) They are a shared resource in CWS/CMS, which means that they are searchable. Before creating a new Service Provider, you should always search to see if another user has already created the provider.
   c) Examples of providers are doctors, counselors, public health nurses, non-CWS social workers, etc.

2) **Why do we have to search for Service Providers?**
   a) In order to prevent duplication of providers and clutter in the CWS/CMS application.
   b) It also allows us to perform our work more quickly in that we do not have to repeatedly enter the name and information for providers that we use frequently.
   c) CWS/CMS can better track which children receive services from the same provider.

3) **How do I attach a Service Provider to a specific client's CWS/CMS case?**
   a) First, you must successfully find the provider through searching or you must create a new provider.
   b) Once you have found or created the provider, you can use the provider in a CWS/CMS notebook. (Note: Once you close/exit the Client Services Application the provider search results will no longer be in the computer's memory for your usage).
   c) Once you have found or created the provider, you can also enter them on the client's Service Provider Page in the Client Notebook (Blue Section, 1st Notebook).

4) **What is the best way to search?**
   a) Searching is an art and is perfected with practice.
   b) Using the **"Wildcard"** feature helps to ensure that you find providers whose name and/or agency may be entered incorrectly in the application. The "Wildcard" character is **%** and it can be used at the beginning, middle, or end of a word.
   c) Using the "Tab" key after each entry in the search window helps CWS/CMS understand that you are finished entering information in a field.
   d) On the Search drop down menu, use **[Search, Search Again]** if you need to add or subtract items from your search criteria. This command allows you to change your criteria without starting all over again.

SEARCHING -- EXISTING SERVICE PROVIDERS



We want to AVOID DUPLICATION whenever possible!

STEP 1 Section 4

You will only need to search for a Service Provider if they are not available to you in the child's case. You will then need to search and attach the provider to the case.

To Search for a Service Provider

1) On the menu bar, select **[Search, Start Search].**
2) Search Type = **Service Provider**
3) Criteria
   a) Use Wildcard "**%**" wherever appropriate
   b) After each field entry, hit the **Tab Key** to register your entry.
      i) Last Name
      ii) First Name
      iii) Agency Name
4) Click **[OK]** when you have finished entering the criteria and CWS/CMS will search the database.
5) If CWS/CMS is unable to locate the Service Provider, **"No hits found in search, Redo Search"** will appear in blue in the top left status box.
   i) If you do not find the Service Provider, on the menu bar select **[Search, Search Again]** and redo the search criteria.

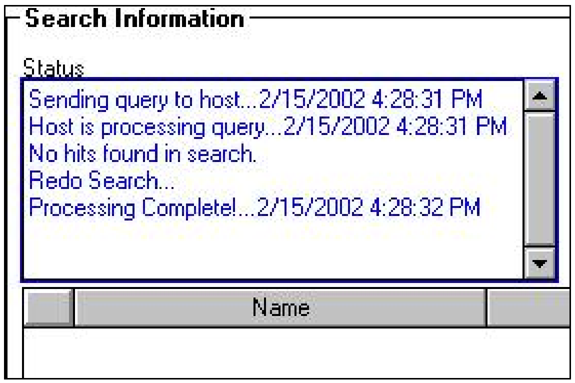
If your search is successful and you found the Service Provider, you can now attach them to the case:

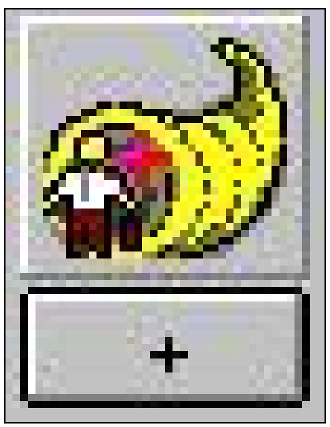
6) Click back to the notebook where you need to use the provider and he/she should be available in the drop down list of service providers.

If your search was unsuccessful and you did NOT find the Service Provider:

1) You will need to follow the steps on the next page to create a new provider.

Unsuccessful Search – "No Hits"





SERVICE MANAGEMENT (Orange)

Service Management Section (Orange)

If you have conducted a thorough search and you were unable to locate the Service Provider, you may create a new Service Provider.

Creating a New Service Provider:

1) Click to the Service Management Section (Orange)
2)  Click the **[+]** plus to "Create A New Service Provider" Notebook.
3) Complete both the ID and Address Pages
   a) Name
   b) Agency
   c) Phone Number
   d) Address

Once you have created the Service Provider, you can now attach them to the case:

4) Click back to the notebook where you need to use the provider and he/she should be available in the drop down list of service providers.

UPDATING SERVICE PROVIDER INFO.

SERVICE MANAGEMENT (Orange)

STEP 3 Section 4

Service Management Section (Orange)

If you need to correct or update the name or information for a Service Provider who is already attached to a case, you should follow the steps below.

Updating Existing Service Provider Information:

1) Click to the Service Management Section (Orange)
2)  Click to "Open Existing Service Provider" Notebook.
3) Update both pages
   a) ID Page
      i) Name, Agency, Phone
   b) Address Page
      i) Address
4) Save To Database and the change will take effect for EVERY child in CWS/CMS who has that provider attached to their case.

SECTION 5:
ASSOCIATING AND CREATING COLLATERALS

1) Who are CWS/CMS Collaterals?

a) Individuals and agencies who provide support to clients and information about the case. They are people who have a unique relationship with a specific client or family.

b) They are NOT a shared resource in CWS/CMS, which means that you do not have to search for them in order to attach them to a case.

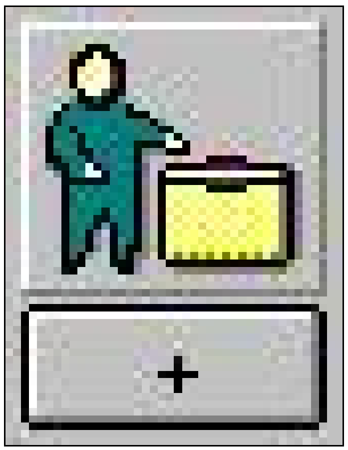
c) Examples of collaterals are child advocates, grandparents and other relatives, godparents, NREFM's, family friends, etc.

2) How do I attach a Collateral to a specific client's CWS/CMS case?

a) Open the Collateral Notebook (Blue Section) to verify that the person is not already attached to the case.

b) After creating a new Collateral Notebook, you can use the provider in a CWS/CMS notebook.

CREATING NEW COLLATERALS



CLIENT MANAGEMENT SECTION (Blue)

STEP 1 Section 5

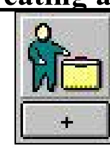
Client Management Section (Blue)

Before you create new collateral, you should verify that the individual is not already attached to the case. This prevents duplication of collaterals.

Checking to View If the Collateral Already Exists In a Case:

1)  Click to "Open Existing Collateral" Notebook
2) Click on the appropriate client's name in the top grid and you will see the attached collateral for that person in the bottom grid.
   a) If nothing appears in the bottom grid, no collaterals are attached to the highlighted client.

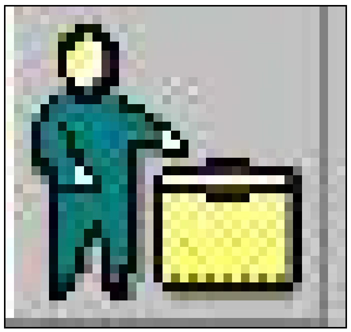
Creating a New Collateral:

3)  Click the **[+]** plus to "Create New Collateral" Notebook.
4) Complete all three pages
   a) ID Page
      i) Name, Agency, Phone
   b) Address Page
   c) Related Clients Page
      i) Tells CWS/CMS the relationship
      ii) You can relate one collateral to multiple clients in the same case

Once you have created the Collateral, they are automatically attached to the case and ready for you use:

5) Click back to the notebook where you need to use the collateral and he/she should be available in the drop down list of collaterals.

UPDATING COLLATERAL INFORMATION



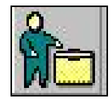
CLIENT MANAGEMENT SECTION (Blue)

STEP 2 Section 5

Client Management Section (Blue)

If you need to correct or update the name or information for a Collateral who is already attached to a case, you should follow the steps below.

Updating Existing Collateral Information:

1) Click to the Client Management Section (Blue)
2)  Click to "Open Existing Collateral" Notebook.
3) Update all three pages
   a) ID
   b) Address
   c) Related Clients
4) Save To Database

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SECTION 6:
RETRIEVING AN EXISTING CONTACT, ASSOCIATED SERVICE, OR ASSOCIATED VISIT

At any time you can retrieve contacts that have been "Save To Database" or that are in your computer's memory while waiting to be saved. Please not that others can not retrieve your contacts until you have saved them. When retrieving contacts the most important functions are filtering and retrieving history.

1) Filtering Contacts

a) CWS/CMS has the ability to filter or select out only contacts involving a specific client.

b) It can also filter or select out entries made on the Contact Page separate from those made on the Associated Services and Associated Visits Page.

2) Retrieving History of the Contact Notebook

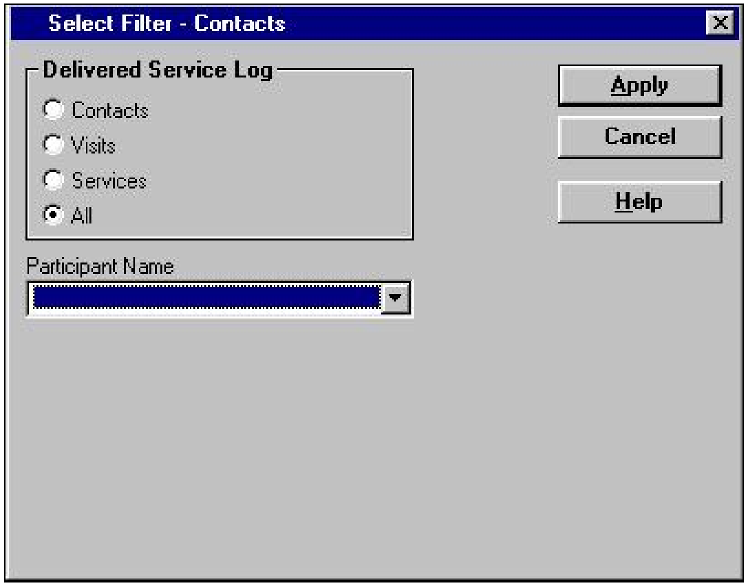
a) In order to save memory and to operate more quickly, CWS/CMS initially only pulls into your computer's memory the most recent Contact Notebooks associated to a case. These are typically the Contact Notebooks that were created in the past 30 days.

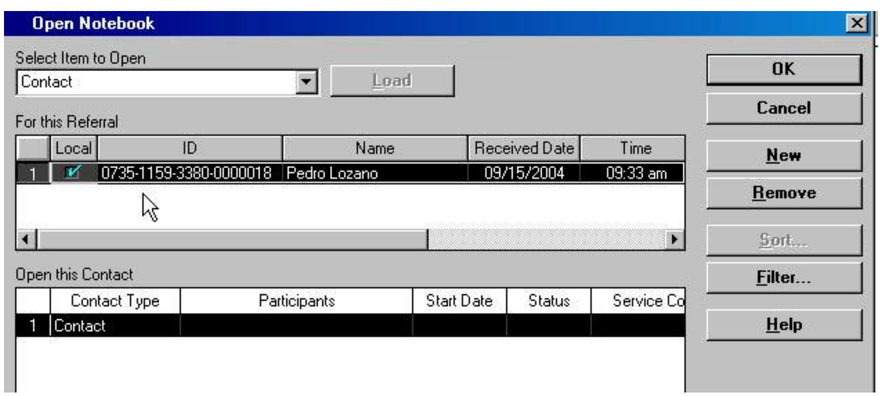
b) If you would like to retrieve a Contact Notebook that is not recent, you can use the "History" button to retrieve the information.

c) It is recommended that you retrieve the history Contact Notebooks for the specific time period of interest to you before you print the Delivered Services Log. This will ensure that everything that is available in the computer will print.

FILTER – CONTACT TYPES & PARTICIPANTS

Service Management Section (Orange)





STEP 1 Section 6

Service Management Section (Orange)

1)  Click the **[Open Existing Contact]** notebook (rolodex) and a dialog box appears, **'Select Filter Contacts'.**

   a) Delivered Service Log Filter

      i) You can choose one of the options (The default is **[All]** which means there will be no filter in this area).

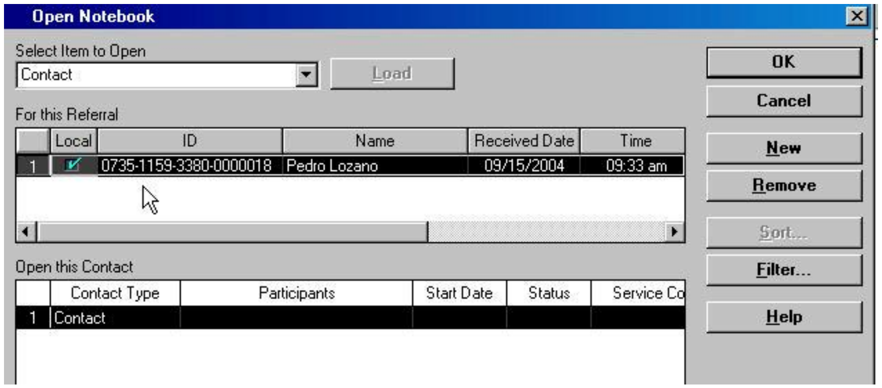
   b) Participant Name Filter

      i) If needed, select the participant for whom you would like to filter.

2) Then select **[Apply]** and a dialog box will appear to show the most recent entries that meet your filter specifications.

RETRIEVE HISTORY & OPEN NOTEBOOK

Service Management Section (Orange)



STEP 2 Section 6

If you do not immediately see the entry that you need to retrieve in the bottom half of the window, perform the following steps.

1) If there is a scroll bar, use it to view additional entries and this may reveal the entry you are looking for.
2) Select the **[History]** button on bottom right of dialog box**.**
   a) The 'Retrieve Historical Information' dialog box appears.
   b) Select the applicable option for the time frame you need to retrieve.
   c) Then click **[OK].**
   d) When the computer finishes retrieving the contact information, scroll until you find the Contact you are looking to retrieve.
3) Select the entry you wish to retrieve
4) Then click **[OK].**
5) The specified Contact Page will appear on-screen.
6) Remember to **Save to Database** any changes you make.

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SECTION 7:
PRINTING CONTACTS
(DELIVERED SERVICES LOG)

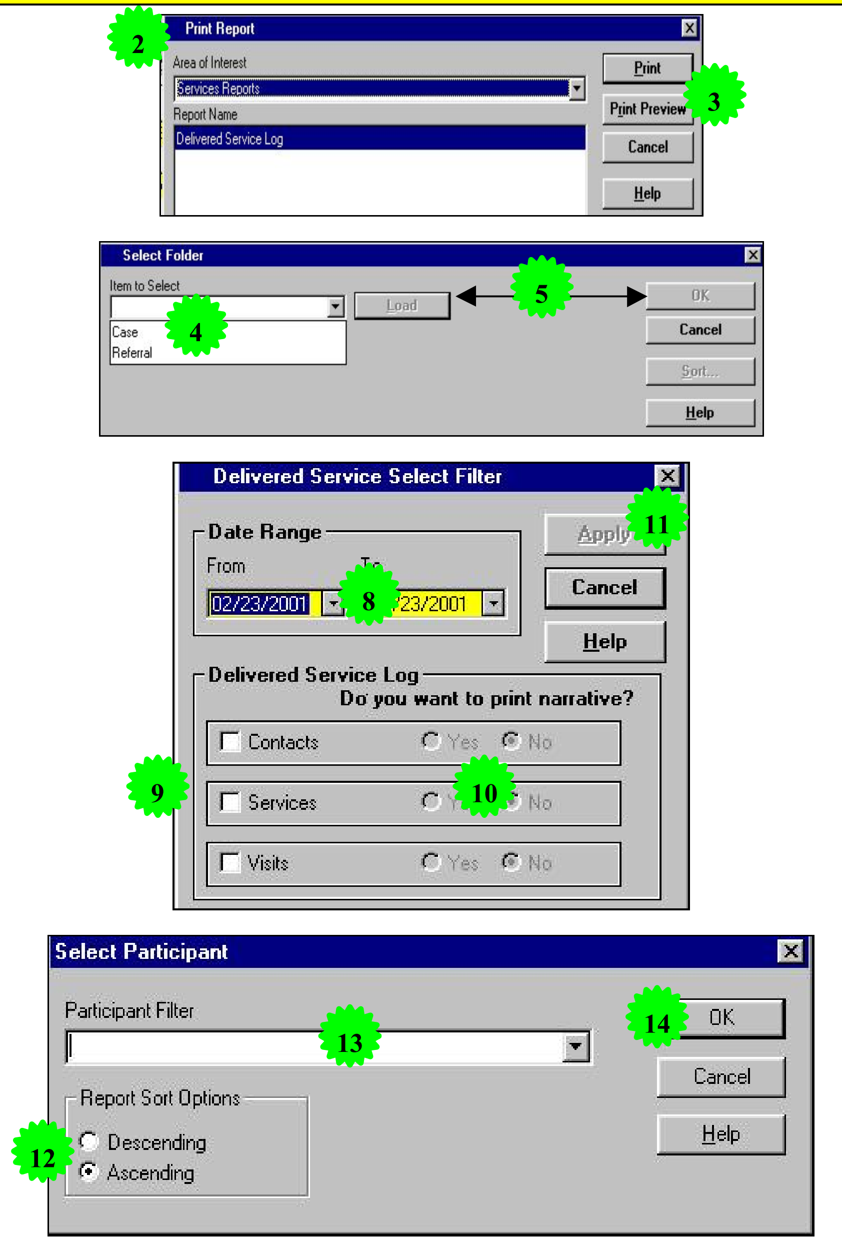
CWS/CMS Contact Notebook entries are printed in a report called the **"Delivered Services Log"**.

Because this is a report in CWS/CMS, the application does not save the actual log but recreates it each time you need to print a Contact Notebook entry. Because the log is not stored/save, it is not recommended that you make corrections or changes on the document. Rather, you should go back into the application, make the necessary corrections to the Contact Notebook, and then re-print the log.

SPECIAL NOTES WHEN PRINTING THE DELIVERED SERVICES LOG:

- If you have newly created contacts that have not yet been <u>saved to the database</u>, you must save them to the database or they will not print.
- You may want to retrieve history for the time period that you which to print in order to ensure that everything prints.
- If you open any contact before you begin the print process, CWS/CMS will default to the specific location to print the Delivered Services Log. Otherwise, you will need to input the location yourself.

PRINT REPORT – DELIVERED SERVICES LOG



STEP 1 Section 7

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]**.

SECTION 8:
MANDATORY CONTACTS (SW PLAN CONTACTS)

CWS/CMS refers to Mandatory Social Worker Contacts with clients as **“SW Plan Contacts”**. Knowing this difference in terminology is important when working with both Contacts and Case Plans in the application. Please refer to State regulations and DFCS policy for a detailed explanations of what constitutes a Mandatory Contacts.

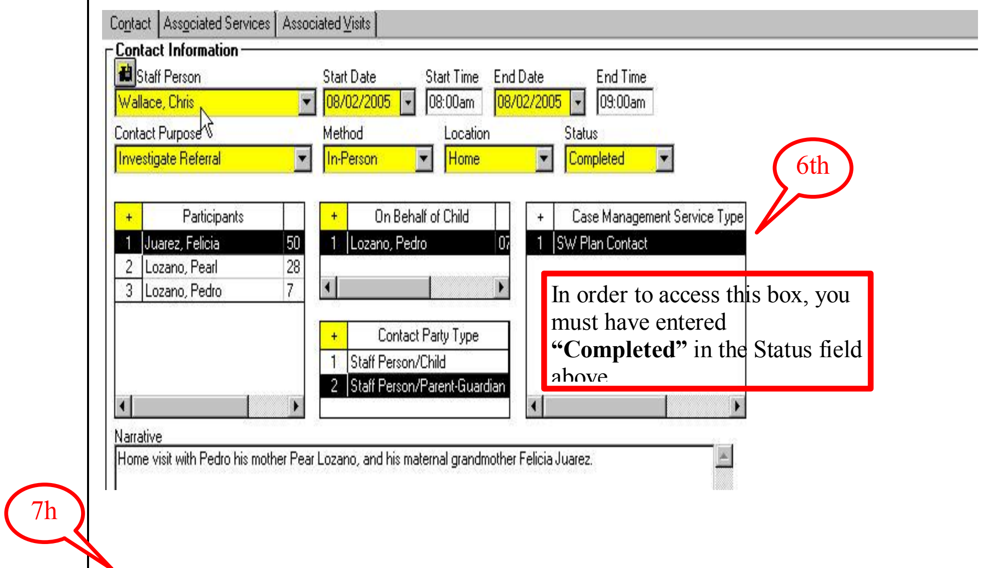
IMPORTANT CONTACT PAGE AUDIT FIELDS:

- All mandatory **“yellow”** fields
- End Date (not “yellow” but is mandatory)
- Method **“In-person”**)
- Status (for cases **“Completed”** or for referrals it can be **“Completed”** or **“Attempted”**)
- Participants (list only clients who were present for the contact being documented at a specific time)
- On Behalf of (this box ensures that the contact is entered in the case of all relevant children)
- Contact Party Type (for cases, can choose any option or for referrals it has to be **“Investigate Referral”**)
- Case Management Service Type (choose **“SW Plan Contact”** whenever a contact meets the definition of a mandatory contact; all staff with the words **“Social Worker”** in their title are eligible to click “SW Plan Contact” when they have a face-to-face visit with a child)
- Narrative should include the names of the client participants (i.e. children and parents)

Why This Is Important:

1) Federal, State, and County regulations mandate that Social Workers document that they have had face-to-face contact with the children and parents receiving services.
2) DFCS requires Social Workers to document their mandatory contacts in the Contact Notebook (Rolodex) of CWS/CMS.
3) For future audits, the State Department of Social Services may use the Contact Notebook to monitor whether Santa Clara County is in compliance with contact timeliness.
4) Selecting “SW Plan Contact” helps to ensure that CWS/CMS and the various entities who audit the cases are aware that a specific contact meets the mandatory contact requirements.

RECORDING MANDATORY CONTACTS



STEP 1 Section 8

Completing the appropriate fields to record a mandatory contact:

Contact Page:

1st Complete the mandatory yellow fields

2nd Input an End Date

3rd Method = In-Person

4th Status =

- For Cases = Completed
- For Referrals = Completed or Attempted

5th Participant = must include child who was present

6th In the Case Management Services box = "SW Plan Contact"

7th Complete the narrative box

- Names of the person you saw
- It is not permissible to type "Refer to SC 909."
- Spell Check (on the Edit drop down menu)
- Sign Entry

SECTION 9:
MANDATORY CONTACTS FOR CHILDREN PLACED OUT-OF-STATE

Santa Clara County has created an alternative method to document contacts for children placed out of state in order to meet the needs of our county. When such children are appropriately identified in an approved Case Plan, the State will not include these children in their contact timeliness measures. If changes in policy are made at the State level which impact this area, the CWS/CMS trainer will inform staff of any new policies.

We require social workers to input a CWS/CMS contact as agreed upon in the ICPC agreement or at least once every six for children who are placed outside of California.

1) How do I document a contact for a child that was assessed by an out-of-state worker?

a) As a work around until state policies changed, creating contacts for children placed out of state is similar to creating mandatory contacts for other children.

b) Complete the Contact Page of the Contact Notebook making sure to note in the narrative if the child was seen by another agency in another state.

2) Why should you create a contact notebook to document that a child placed out of state was assessed by an appropriate party?

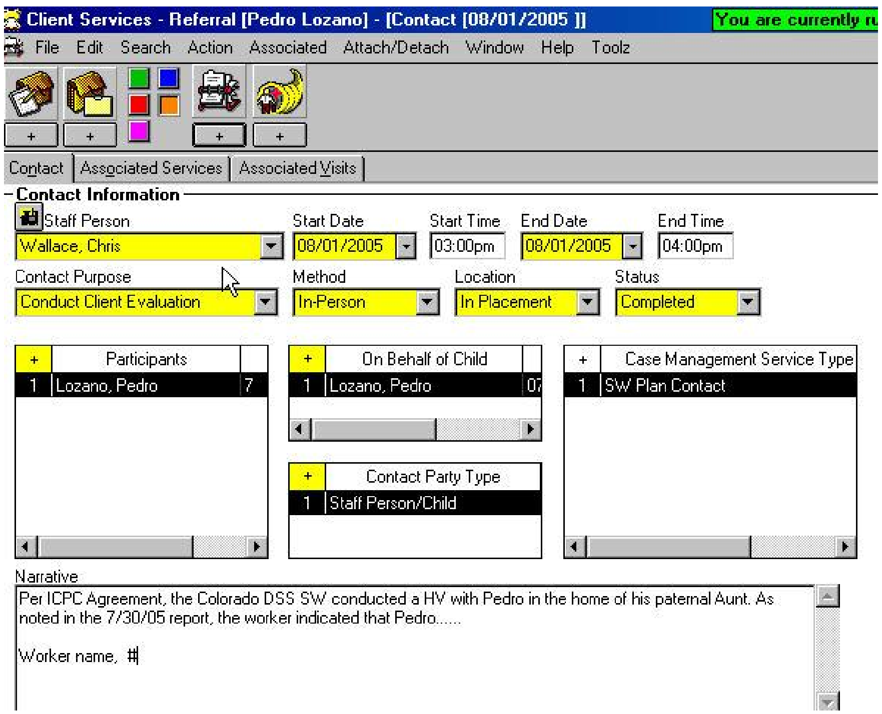
a) To ensure the safety of children

b) To ensure that the most recent contact information is easily assessable in CWS/CMS

c) To ensure that contact information prints to critical CWS/CMS document such as the SOC 158 form

Note: Children placed in another county (within California) should either have contacts entered by the primary assigned social worker or by the courtesy supervision worker in the other county. Because CWS/CMS is a statewide system, staff from other counties can easily access the case if we give them secondary assignment to the case.

CONTACTS FOR CHILD PLACED OUT OF STATE



STEP 1 Section 9

<u>Until further notice, these contacts should be entered as agreed upon in the ICPC agreement or at a minimum of every six months.</u>

Completing the appropriate fields to record a mandatory contact for a child placed out of state:

<u>Contact Page:</u>

1st Complete the mandatory yellow fields

2nd Input an End Date

3rd Method = In-Person

4th Status = Completed

5th Participant = must include child who was present

6th In the Case Management Services box = "SW Plan Contact"

7th Complete the narrative box

- Names of the visit participants
- It is not permissible to type "Refer to SC 909."
- Spell Check
- Sign Entry
- Include who saw the child and what agency they represent
- Include how you were notified about the contact (i.e. phone call or letter from other worker)

SECTION 10:
CONTACT WAIVERS AND VISITATION EXCEPTIONS

In CWS/CMS, you need to document **Visitation Waivers** and **Contact Exceptions** that might explain why you would not have monthly contacts with a child on your case.

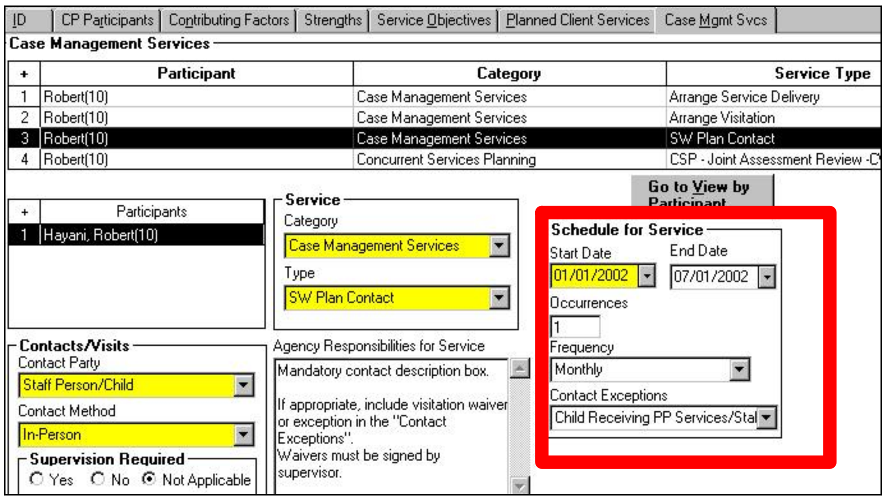
Why This Is Important:

1) Federal, State and County regulations mandate that Social Workers document monthly face-to-face contacts with children in CWS/CMS (Contact Notebook [Rolodex]).
2) Only children with visitation waivers are exempt from mandatory monthly contacts. However, children must be seen at a minimum of every 3 months for PP cases and a minimum of every 2 months in FM and FR cases.
3) Contact Waivers and Case Plans must be updated every six months.
4) Both the Contacts and Waivers must be in CWS/CMS in order to comply with State audit requirements for contact timeliness.
5) Santa Clara County's performance on this and other areas in CWS/CMS will be electronically monitored by the State.

How to Document That A Child is on Run Away or Has Been Abducted:

1) If the child is in placement, submit a Placement Change Form (SCZ 17) to end the placement using the reason "Child Ran Away from Placement" or "Child Abducted".
2) If child is missing longer than 30 days, you should also update your case plan to reflect the appropriate visitation exception.

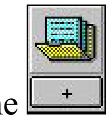
CONTACT WAIVERS & VISIT EXCEPTIONS



STEP 1 Section 10

Case Management Section (Green)

When you create your next CWS/CMS Case Plan, you can correct or update this information by performing the following tasks:

1) While in the  "In-Progress" Case Plan Notebook, click to the "Case Mgmt Svcs." Page (last tab).
2) Find and select the row which corresponds to your "SW Plan Contact" or mandatory contact with the child.
3) Complete the **"Agency Responsibilities for Service"** box with a description of your visitation mandates.
4) Input the **"Occurrence"** and **"Frequency"** based on your specific mandate for this child (if you have a waiver, at a minimum once every 6 months).
5) If you have a waiver, the child has remained on Run-away status, or the child is out-of-state, you must input the **"Contact Exception"** reason. Please select the reason that best describes the exception.
6) If you have a waiver, you will also need to update the **"Start Date"** and **"End Date"** so that they match the dates on the hardcopy in the file. The maximum date range is 6 months.

    ****NOTE:** If needed, you may also add this information to an existing Case Plan that is already Approved and "In-Effect". In order to do this, you will need to (1) Change the approval status from "Approved" to "Requires Modifications" (2) Update the information (3) Remove and re-create the Case Plan Document and (4) Re-submit the Case Plan for electronic approval by your Supervisor.