CWS/CMS (Referral)

Create a Referral

Process Map

OPEN CLIENT SERVICES

1. Click the **Client Services** application.

CREATE A REFERRAL FOLDER

2. Click the **"+"** under **Referral Folder**.
3. Complete all mandatory (yellow) and known fields on the Referral ID page.
4. Click the **Reporter page** tab.
5. Complete all mandatory (yellow) and known **fields**.
6. Click the **Assignment page** tab.
7. Complete all mandatory (yellow) and known **fields**.

CREATE SCREENER NARRATIVE

8. Click the **"+" Document – Referral** notebook.
9. Select **Screener Narrative** in the **Generate New Documents** dialog box.
10. Click **OK** and complete the document.
11. **Save, close** and **minimize MS Word.**

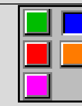
PERFORM CLIENT SEARCH

12. Click the **Search** drop-down menu.
13. Select **Start Search**.
14. Enter the search criteria.
15. Click **OK.**
16. Double click to open the client's abstract.
17. Click **Yes.**
18. Verify that this is the correct client.
19. Click the **Window** drop-down menu.
20. Close the **abstract** window and the **search results** window.

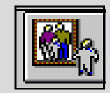
ATTACHING CLIENTS

21. Click the **Attach/Detach** drop-down menu.
22. Select **Attach Existing Client**.
23. Select the client(s) to attach in the **Attach this Client** grid.
24. Click **OK.**

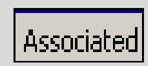
OPEN ASSOCIATED REFERRALS



25. Click the **Client Management Section** (**blue** button).



26. Click the **Open Existing Client** notebook.
27. Select the **client**.
28. Click **OK**.



29. Click the **Associated** drop-down menu.
30. Select **Open Associated Referrals**.
31. Select a **referral** to open.
32. Click **OK**.
33. Click **Yes**.
34. Click the **Window** drop-down menu.
35. Select the newly created referral to bring it into focus.

ATTACH EXISTING CLIENTS

36. Click the **Attach/Detach** drop-down menu.

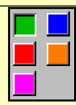
37. Select **Attach Existing Client**.

38. Select the **client(s**) to attach.

39. Click **OK**.

40. Use the **Open Existing Client** notebook to open the client notebooks you have attached and update information such as updating the client address and proper client relationships on the **Related Clients** page.

CREATE ALLEGATION NOTEBOOK

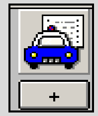


41. Click the **Referral Management Section** (**green** button).

42. Click the **"+"** under the **Allegation** notebook.

43. Complete all mandatory (**yellow**) and known **fields** on the **ID** page.

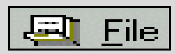
CREATE CROSS REPORT NOTEBOOK



44. Click the **"+"** under the **Cross Report** notebook.

45. Complete all mandatory (**yellow**) and known **fields** on this page.

CREATE SUSPECTED CHILD ABUSE REPORT



46. Click the **File** drop-down menu.

47. Select **Print Report**.

48. Select **Suspected Child Abuse Report.**

49. Click **Print Preview**.

50. Select the newly created referral.

51. Click **OK.**

52. Complete the **Referral Incident Information** text boxes.

53. Click **OK**.

54. Complete the report.

55. **Print, close** and **minimize Microsoft Word**.

DETERMINE RESPONSE TIME

56. Click the **Action** drop-down menu.

57. Select **Determine Response**.

58. Select a **response time**.

59. Complete the page.

60. Click the **Approval** button.

61. Click the **Approval Status** field.

62. Click on **Pending Approval**.

63. Click **OK**.

64. Click **Yes** to generate the referral document.

65. Enter the police report number on the document.

66. **Save, close** and **minimize Microsoft Word.**

SAVE TO DATABASE

67. Click the **File** drop-down menu.

68. Select **Save to Database**.

69. Click **Exit CWS/CMS**.