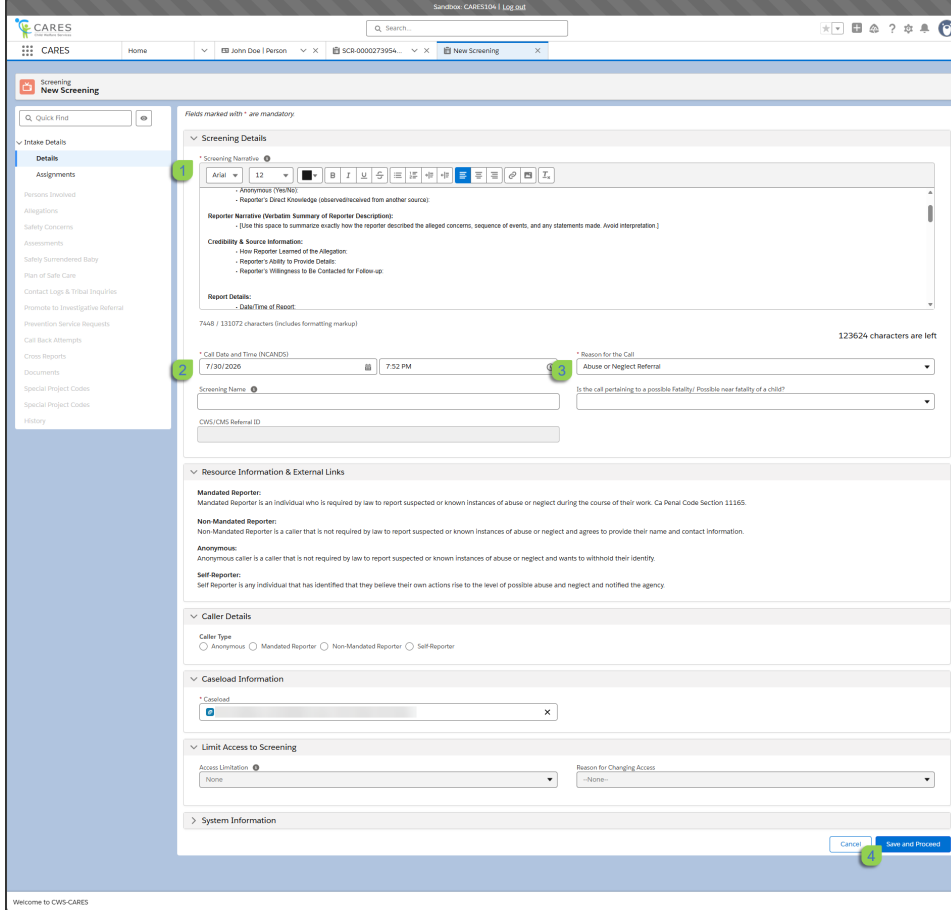


CWS-CARES Hotline Quick Start

This guide demonstrates how a hotline worker can fully document a screening in CWS-CARES from beginning to end in ten simple steps. While these core steps show the minimum mandatory details needed to proceed through the workflow, further details can also be tracked throughout the screening based on varying circumstances of the call.

Before the Call

STEPS	CWS-CARES SCREENSHOT
STEP ONE <i>Initiate Screening</i> 1. Begin drafting screening narrative, to be updated throughout call 2. Track call date and time 3. Track initial reason for a call Quick Tips: • Other fields are available but not initially required to at least start the screening. • Screening record can be created with this minimal information and updated incrementally. • Once the record is created, it is easier to progressively save details instead of needing to enter everything all at once. Time-savers: • Caseload is a mandatory field but is auto-populated based on user details. • Screening name will eventually be required but does not need to be entered right away.	

During the Call

STEPS

STEP TWO

Capture Screening Details

1. Enter Screening Name
2. Indicate caller type

For a mandated reporter example, additional fields become conditionally required:

3. Caller first name
4. Caller last name
5. Caller email
6. Caller preferred method to receive notice of disposition
7. Mandated reporter type
8. Employer name
9. Whether a callback is required
10. Phone number
11. Employer address
12. Save and Proceed

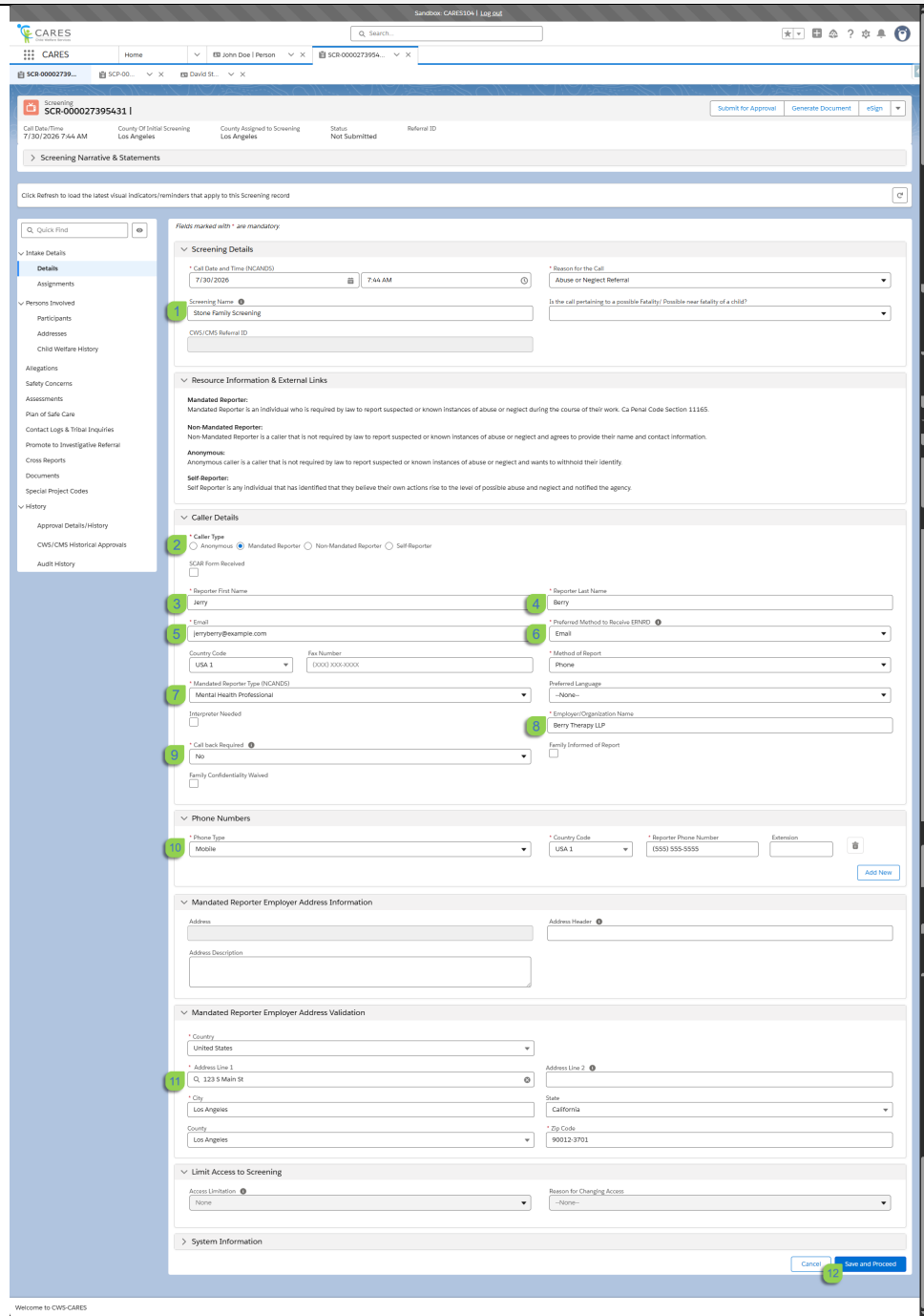
Quick Tips:

- Keyboard shortcut CTRL+S will help save data incrementally.
- Screening narrative can expand/collapse if workers prefer to track everything in the narrative and transcribe to structured fields post-call.

Time-savers:

- Different choices for “Reason for the Call” will dynamically adjust what types of fields are required.

CWS-CARES SCREENSHOT



The screenshot shows the CWS-CARES screening form interface. The form is titled "Screening SCR-0000273954311" and includes a sidebar with navigation options like Intake Details, Details, Assignments, Persons Involved, etc. The main form area contains several sections with numbered callouts:

- 1** Call Date and Time (NCANDS)
- 2** Screening Name
- 3** Screening Name (Stone Family Screening)
- 4** Reporter Last Name
- 5** Email
- 6** Preferred Method to Receive ENRMO
- 7** Mandated Reporter Type (NCANDS)
- 8** Employer/Organization Name
- 9** Call back Required
- 10** Phone Type
- 11** Address
- 12** Save and Proceed

The form also includes sections for "Resource Information & External Links", "Phone Numbers", "Mandated Reporter Employer Address Information", and "Mandated Reporter Employer Address Validation".

STEPS

STEP THREE

Add Participants

1. Search to see if individual exists first
2. If found, "Select Person",
3. If not "Add New Person"
4. Indicate Role
5. Save, and repeat for additional participants

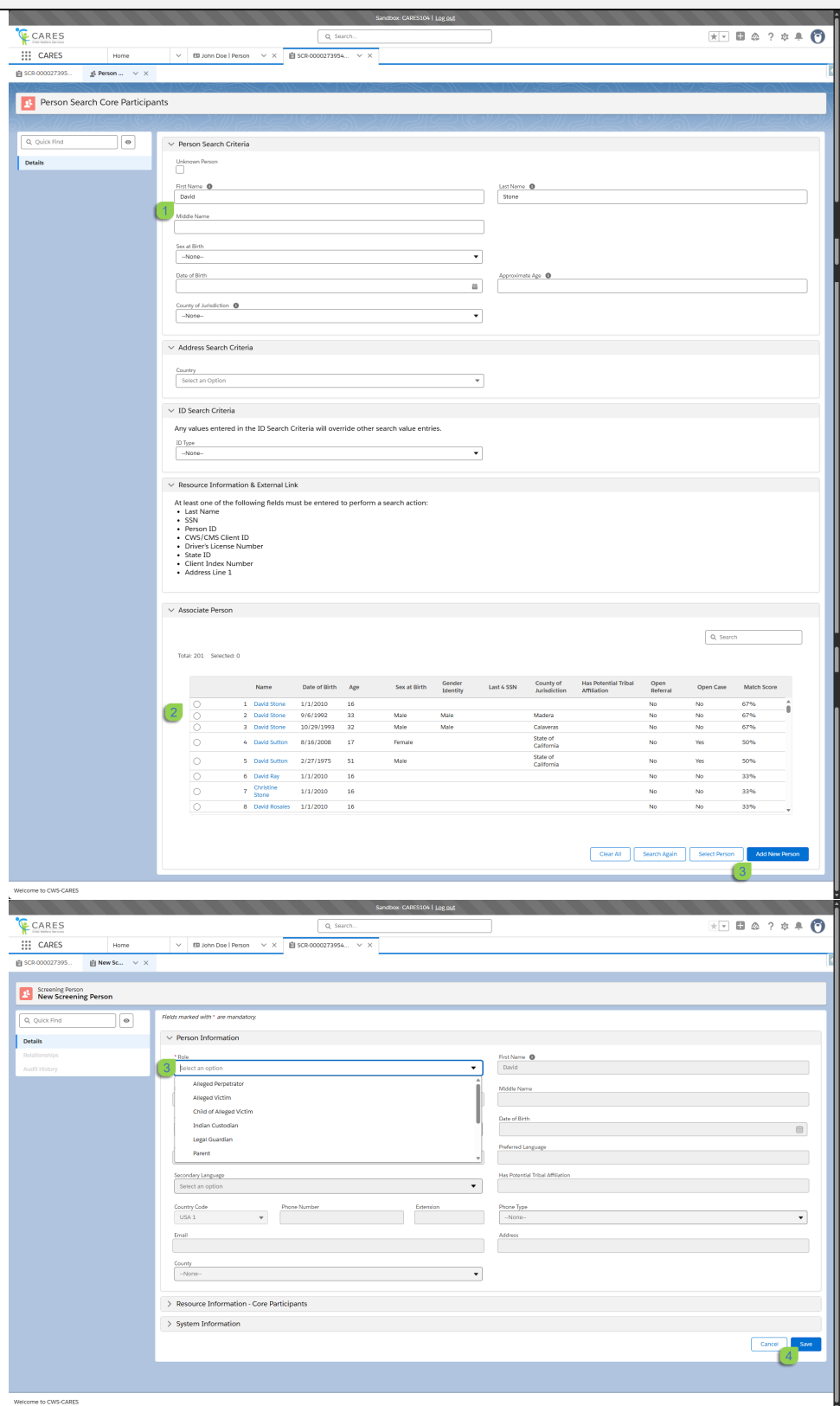
Quick Tips:

- If search result table doesn't display enough basic information to confirm a match, click the name to open their person profile in a new sub-tab to review. Screening Person Add progress will be retained in the original sub-tab and you can return to complete the process once certain.
- At least one alleged victim and one alleged perpetrator are needed per screening.
- When selecting participants known to the system already, their Child Welfare History will be viewable from the screening in both a chronological list and timeline view.

Time-savers:

- Relationships between participants can be viewed for known clients or newly tracked (using Relationships left-navigation) as soon as each person is attached.
- Information added or updated at intake is carried forward and kept in sync with the Person Profile.

CWS-CARES SCREENSHOT



Person Search Core Participants

Search Criteria:

- First Name: David
- Last Name: Stone
- Sex at Birth: Male
- Date of Birth: 1/1/2000
- Country of Jurisdiction: State of California

Address Search Criteria:

- Country: Select an Option

ID Search Criteria:

- ID Type: Select an Option

Resource Information & External Link:

At least one of the following fields must be entered to perform a search action:

- Last Name
- SSN
- Person ID
- CWS/CMS Client ID
- Driver's License Number
- State ID
- Client Index Number
- Address Line 1

Associate Person:

Name	Date of Birth	Age	Sex at Birth	Gender Identity	Last & SSN	Country of Jurisdiction	Has Potential Tribal Affiliation	Open Referral	Open Case	Match Score
1 David Stone	1/1/2000	16	Male	Male		State of California	No	No	No	67%
2 David Stone	6/6/1992	33	Male	Male		California	No	No	No	67%
3 David Stone	10/29/1993	32	Male	Male		California	No	No	No	67%
4 David Sutton	8/16/2008	17	Female			State of California	No	Yes	Yes	50%
5 David Sutton	2/27/1975	51	Male			State of California	No	Yes	Yes	50%
6 David Ray	1/1/2000	16					No	No	No	33%
7 Christine Stone	1/1/2000	16					No	No	No	33%
8 David Routes	1/1/2000	16					No	No	No	33%

New Screening Person

Person Information:

- First Name: David
- Last Name: Stone
- Sex at Birth: Male
- Date of Birth: 1/1/2000
- Country of Jurisdiction: State of California

Relationships:

- Alleged Perpetrator
- Alleged Victim
- Child of Alleged Victim
- Indian Custodian
- Legal Guardian
- Parent

Secondary Language: Select an Option

Country Code: USA 1

Phone Number: [Field]

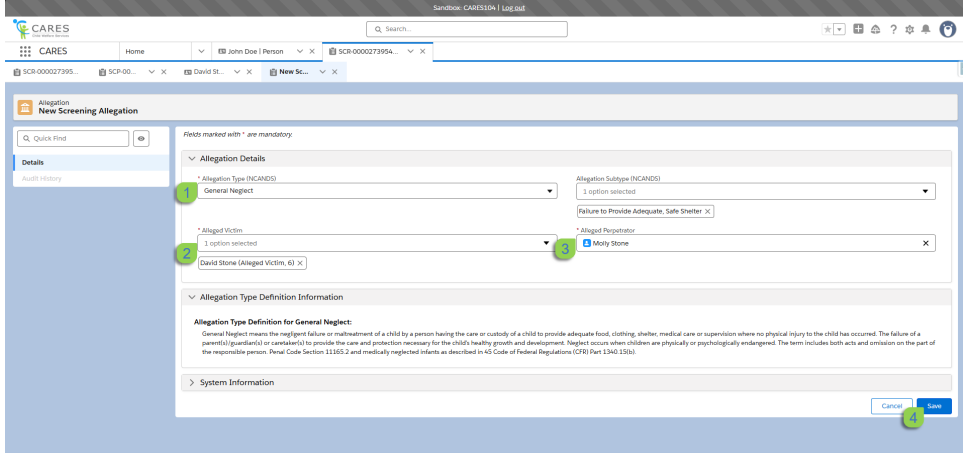
Extension: [Field]

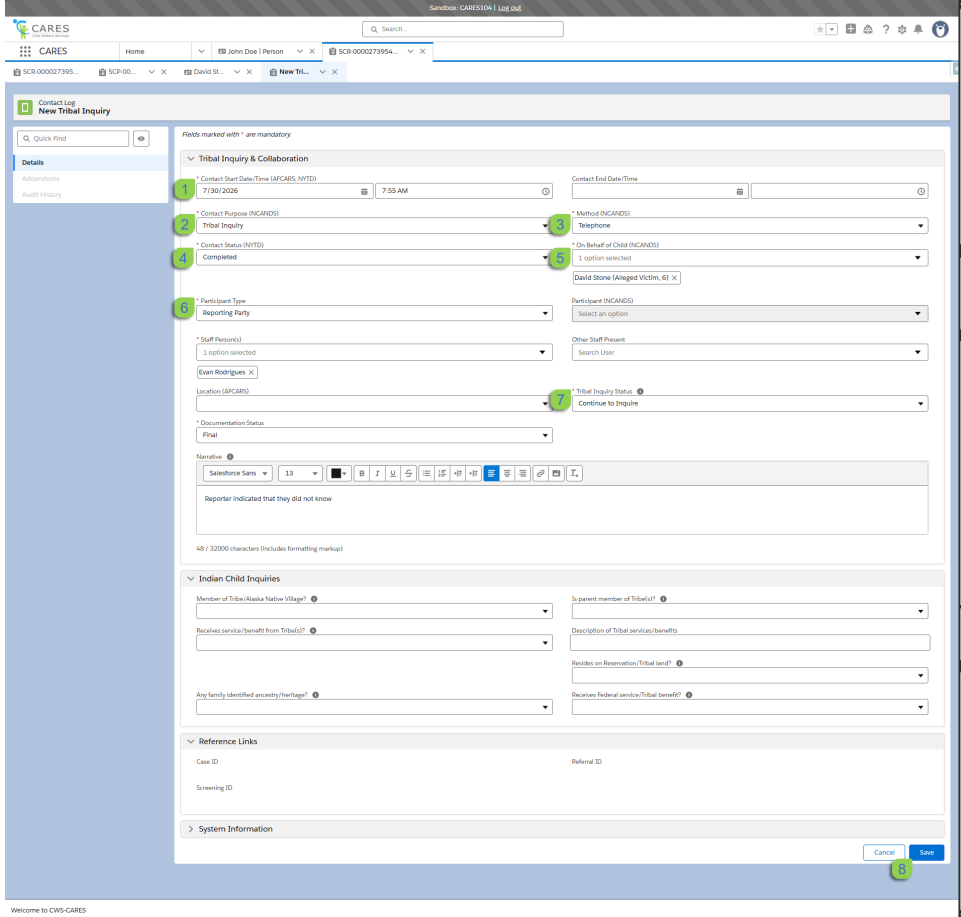
Email: [Field]

Country: Select an Option

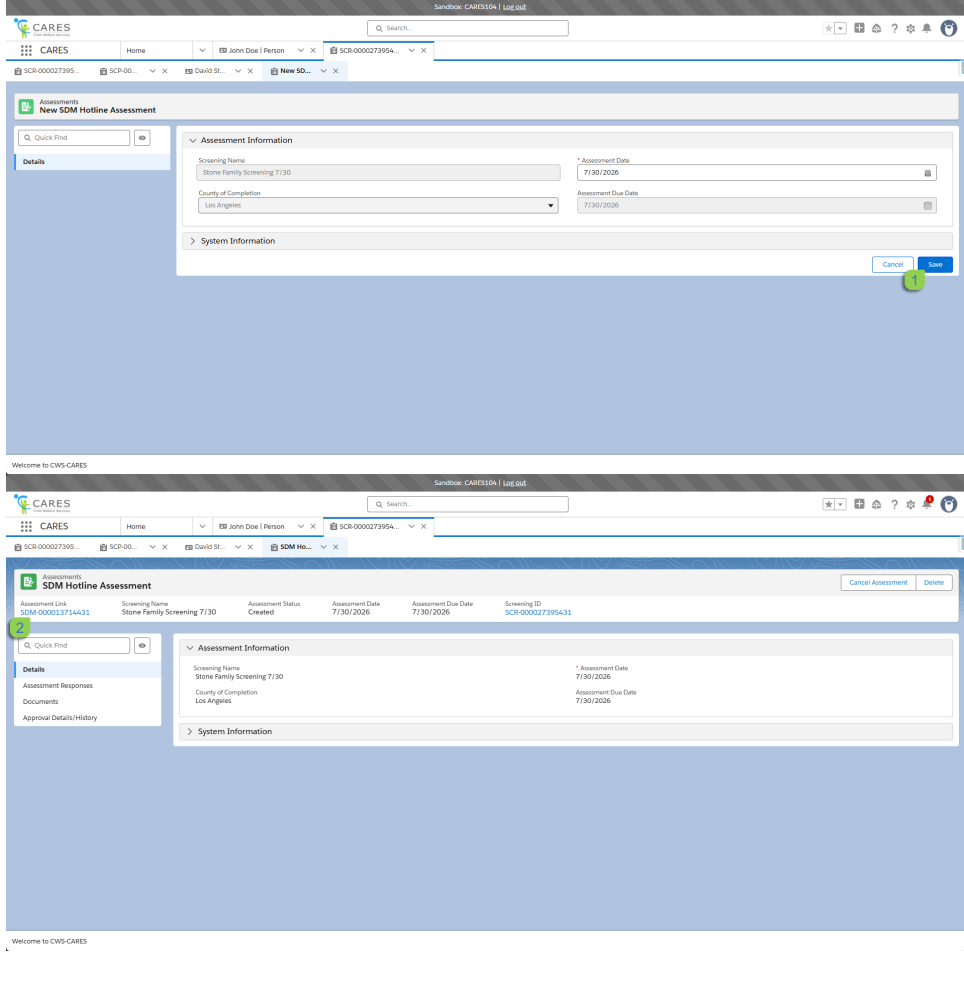
Resource Information - Core Participants

System Information

STEPS	CWS-CARES SCREENSHOT
STEP FOUR <i>Document Allegations</i> 1. Indicate Allegation Type 2. Select alleged victim 3. Select alleged perpetrator 4. Save, and repeat for additional allegations Quick Tips: • Participants are selectable by role based on who was previously attached to the screening. • Allegation type definition dynamically displays after selection as a helpful guide. Time-savers: • Allegation sub-type can initially be left blank but will eventually become required during investigation.	

STEPS	CWS-CARES SCREENSHOT
STEP FIVE <i>Conduct ICWA Tribal Inquiry</i> 1. Select date and time 2. Select “Tribal Inquiry” as contact purpose 3. Select Method 4. Select Contact Status 5. Select alleged victim(s) the inquiry is on behalf of 6. Select participant type 7. Indicate inquiry status 8. Save Quick Tips: • At least one tribal inquiry contact with reporting party is needed per alleged victim. • Additional fields are available but not required. Time-savers: • “On behalf of” is a multi-select field, multiple alleged victim inquiries to the same reporting party can be consolidated into a single contact note.	 The screenshot shows the 'New Tribal Inquiry' form in the CWS-CARES system. The form is divided into several sections. The 'Tribal Inquiry & Collaboration' section contains fields for 'Contact Start Date/Time' (7/30/2026), 'Contact End Date/Time', 'Contact Purpose' (Tribal Inquiry), 'Method' (Telephone), 'Contact Status' (Completed), 'On Behalf of Child' (David Stone), 'Participant Type' (Reporting Party), 'Staff Person(s)' (Evan Rodriguez), 'Location' (AFCARS), 'Documentation Status' (Final), and 'Tribal Inquiry Status' (Continue to Inquire). The 'Indian Child Inquiries' section includes fields for 'Member of Tribal/Alaska Native Village?', 'Is parent member of Tribal(s)?', 'Receives service/benefit from Tribal(s)?', 'Description of Tribal services/benefits', 'Resides on Reservation/Tribal land?', and 'Receives Federal service/Tribal benefits?'. The 'Reference Links' section has fields for 'Case ID' and 'Screening ID'. The 'System Information' section is at the bottom. A 'Save' button is located at the bottom right of the form.

After the Call

STEPS	CWS-CARES SCREENSHOT
STEP SIX <i>Complete SDM Assessment</i> 1. Create hotline assessment record 2. Navigate to SDM to complete assessment Quick Tips: • SDM questions should be answered based on the information already documented in CWS-CARES. • Assessment results are viewable in CWS-CARES after the assessment is completed and approved. Time-savers: • Users with an active CWS-CARES session will not need to log-in again or remember different credentials to the SDM system, as the system uses a single sign-on.	 The top screenshot displays the 'New SDM Hotline Assessment' form. It includes a sidebar with a 'Details' section and a main form area with 'Assessment Information' and 'System Information' tabs. The 'Assessment Information' tab is active, showing fields for Screening Name (Stone Family Screening 7/30), County of Completion (Los Angeles), Assessment Date (7/30/2026), and Assessment Due Date (7/30/2026). There are 'Cancel' and 'Save' buttons at the bottom right. The bottom screenshot displays the 'SDM Hotline Assessment' summary page. It features a table with columns for Assessment Link, Screening Name, Assessment Status, Assessment Date, Assessment Due Date, and Screening ID. The table contains one row with the following data: Assessment Link (SDM-000013714431), Screening Name (Stone Family Screening 7/30), Assessment Status (Created), Assessment Date (7/30/2026), Assessment Due Date (7/30/2026), and Screening ID (SCR-000027395431). The sidebar on the left has links to Details, Assessment Responses, Documents, and Approval Details/History. There are 'Cancel Assessment' and 'Delete' buttons at the top right.

STEPS

STEP SEVEN

Finalize Pathway

1. Confirm County Final Determination

Alternatively, if the screening is evaluated out,

2. Select alternate pathway

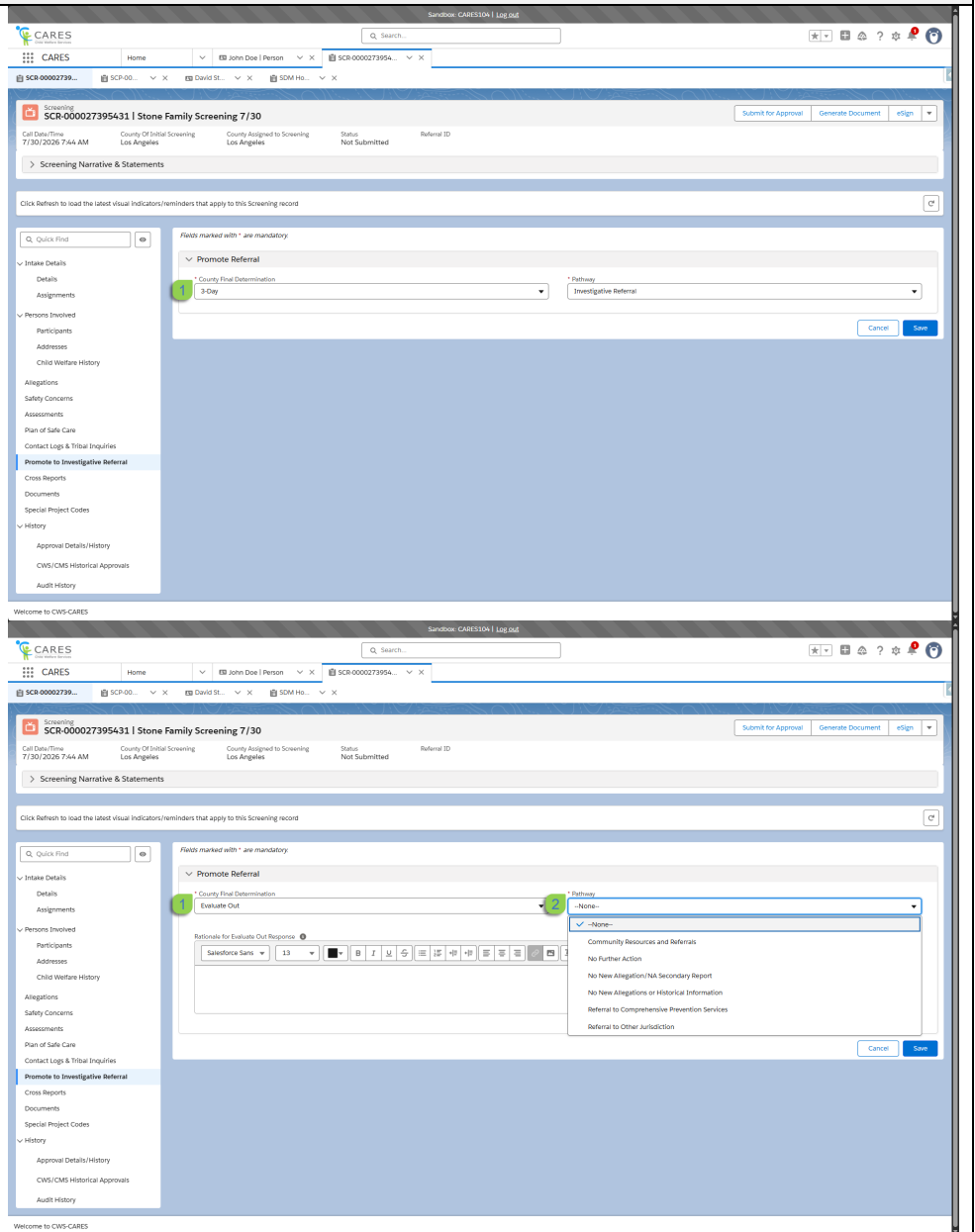
Quick Tips:

- In urgent situations, the SDM assessment can be skipped and determination/pathway directly selected.

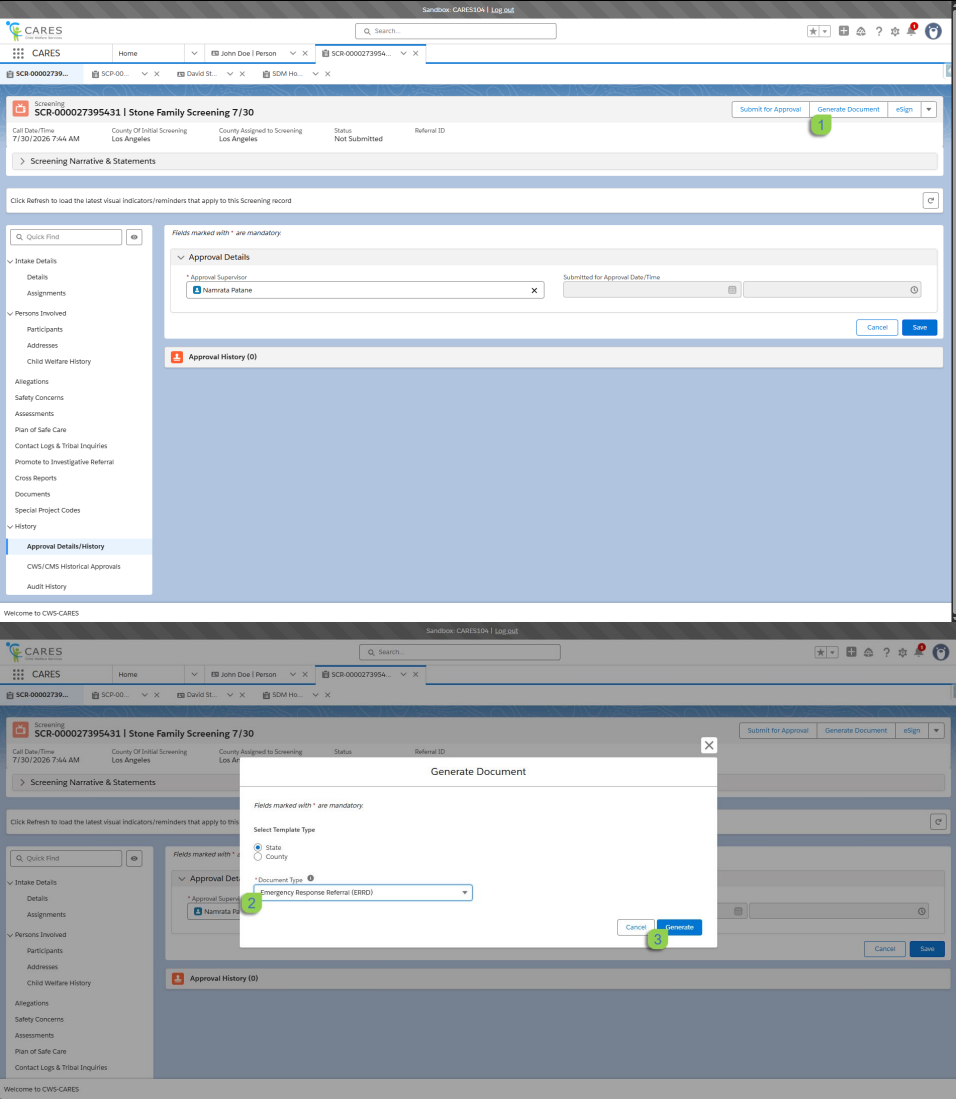
Time-savers:

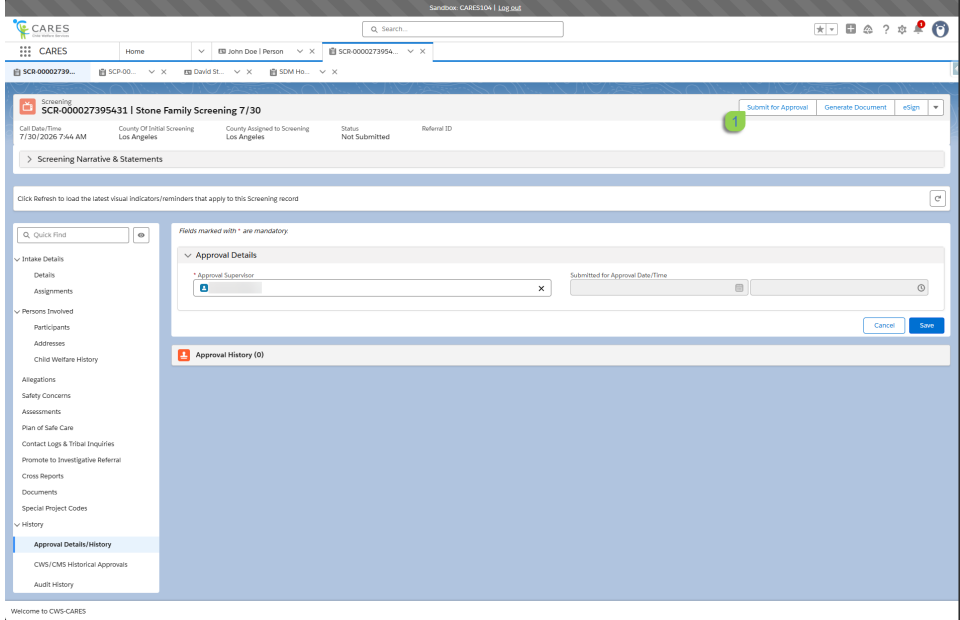
- Final determination auto-populates with the result of the SDM hotline assessment.

CWS-CARES SCREENSHOT

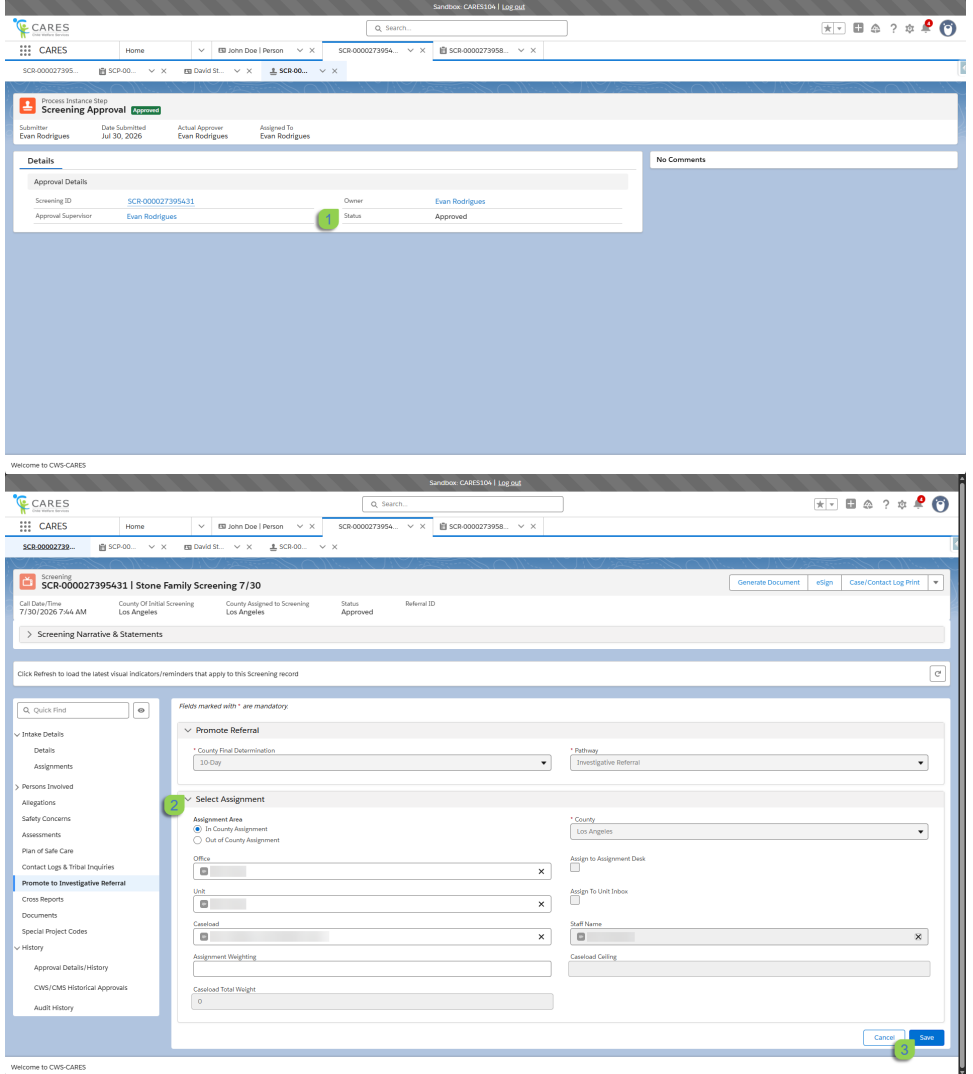


The screenshots show the CWS-CARES interface for a screening record. The top screenshot shows the 'Promote Referral' screen with the 'County Final Determination' dropdown set to '3-Day' and the 'Pathway' dropdown set to 'Investigative Referral'. The bottom screenshot shows the 'Promote Referral' screen with the 'County Final Determination' dropdown set to 'Evaluate Out' and the 'Pathway' dropdown set to 'None'. A 'Rationale for Evaluate Out Response' section is visible in the bottom screenshot.

STEPS	CWS-CARES SCREENSHOT
STEP EIGHT <i>Generate Documentation</i> 1. Click Generate Document 2. Select document type 3. Click Generate Quick Tips: • Emergency Response Referral Document (ERRD) must be generated before submitting for approval. • ERRD is viewable and printable from Documents left-navigation once generated. Time-savers: • Information in ERRD is auto-populated based on information entered in CWS-CARES.	

STEPS	CWS-CARES SCREENSHOT
STEP NINE <i>Submit for Approval</i> 1. Click Submit for Approval Quick Tips: • If changes are needed, screening can be recalled and re-submitted. • Mandatory details are checked by the system, and worker will be conditionally prompted to populate missing information allowing submission for approval. Time-savers: • Approval Supervisor auto-populates based on unit but could be manually changed by the worker before submitting.	 The screenshot displays the CWS-CARES interface for a screening record titled 'SCR-000027395431 Stone Family Screening 7/30'. The record is in 'Not Submitted' status. The 'Approval Details' section is highlighted, showing a dropdown for 'Approval Supervisor' and a 'Submitted for Approval Date/Time' field. The 'Approval History' section below it is currently empty. A sidebar on the left lists various system modules, with 'Approval Details/History' selected. A green circle with the number '1' is placed over the 'Submit for Approval' button in the top right corner of the record header.

Supervisor Approval and Referral Assignment

STEPS	CWS-CARES SCREENSHOT
STEP TEN <i>Supervisor Approval</i> - Supervisor approves - Supervisor selects assignee for Referral Quick Tips: - Referral ID is created after assignment selection is saved to make sure there is always an initial assignment and someone is always accountable. - Approval can be confirmed from process step or within Approval Details/History left-navigation. Time-savers: - Supervisor receives notification when approval is requested. - Screening can be approved by back-ups supervisors within the same unit. - Worker receives notification when screening is approved.	 The top screenshot displays the 'Screening Approval' process. It includes a 'Details' section with 'Approval Details' and 'Approval Supervisor' (Evan Rodriguez). The bottom screenshot shows the 'Promote Referral' and 'Select Assignment' sections, including fields for 'County', 'Unit', 'Staff Name', and 'Assignment Weighting'.