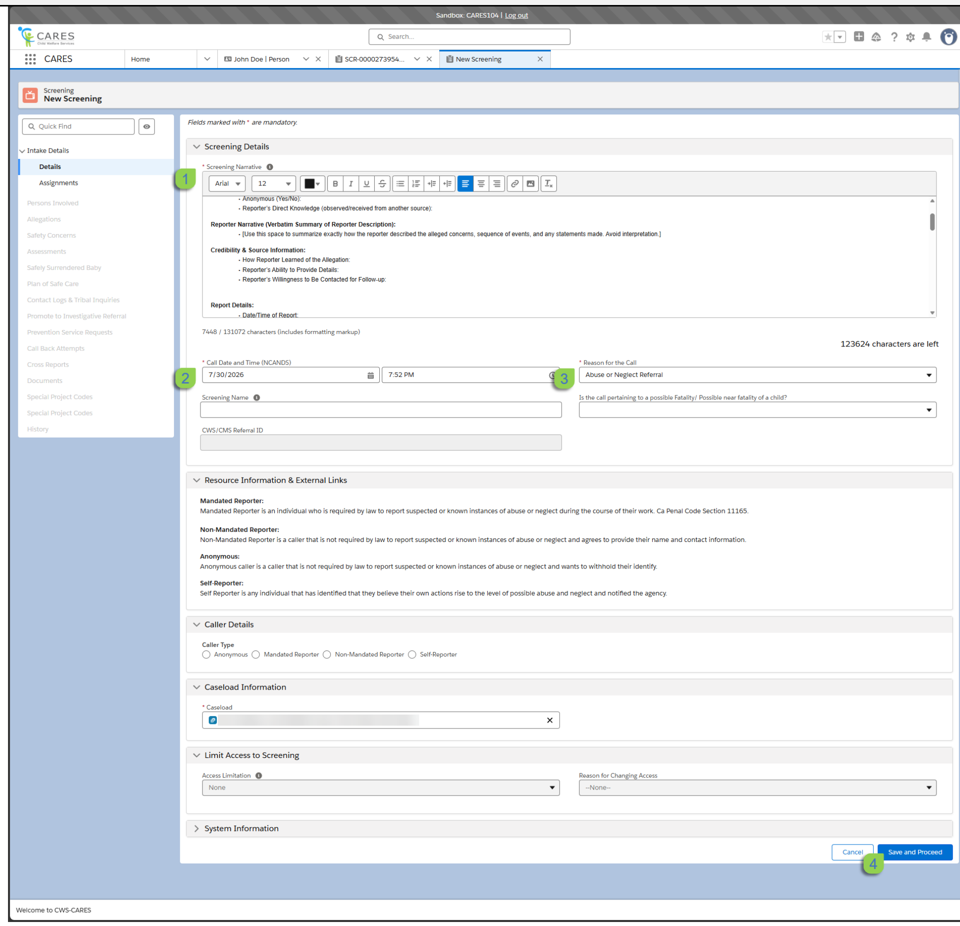
CARES
Child Welfare Services

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 *Initiate Screening* 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.	

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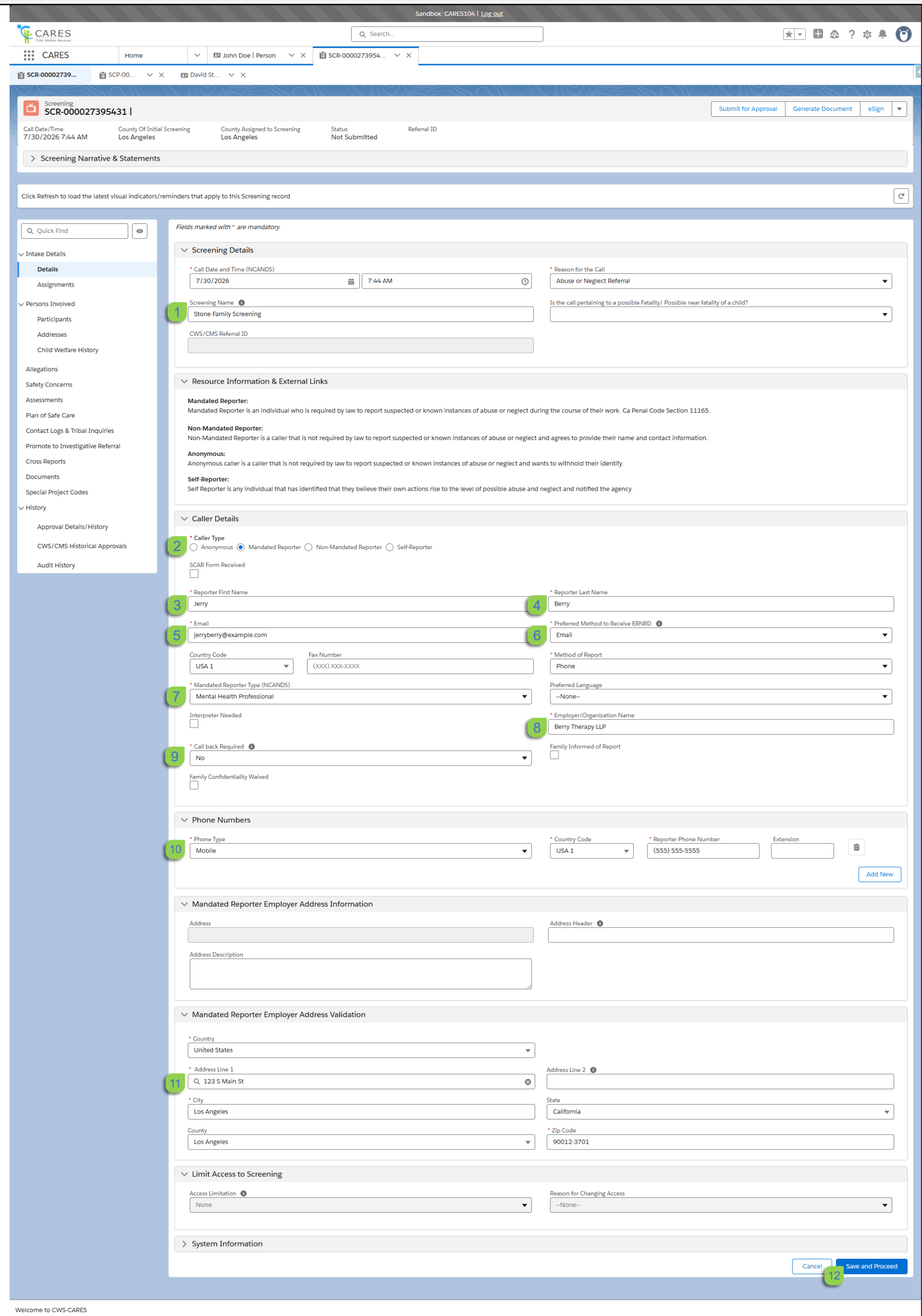
During the Call

STEPS	CWS-CARES SCREENSHOT
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.	

STEPS	CWS-CARES SCREENSHOT

STEP THREE

Add Participants

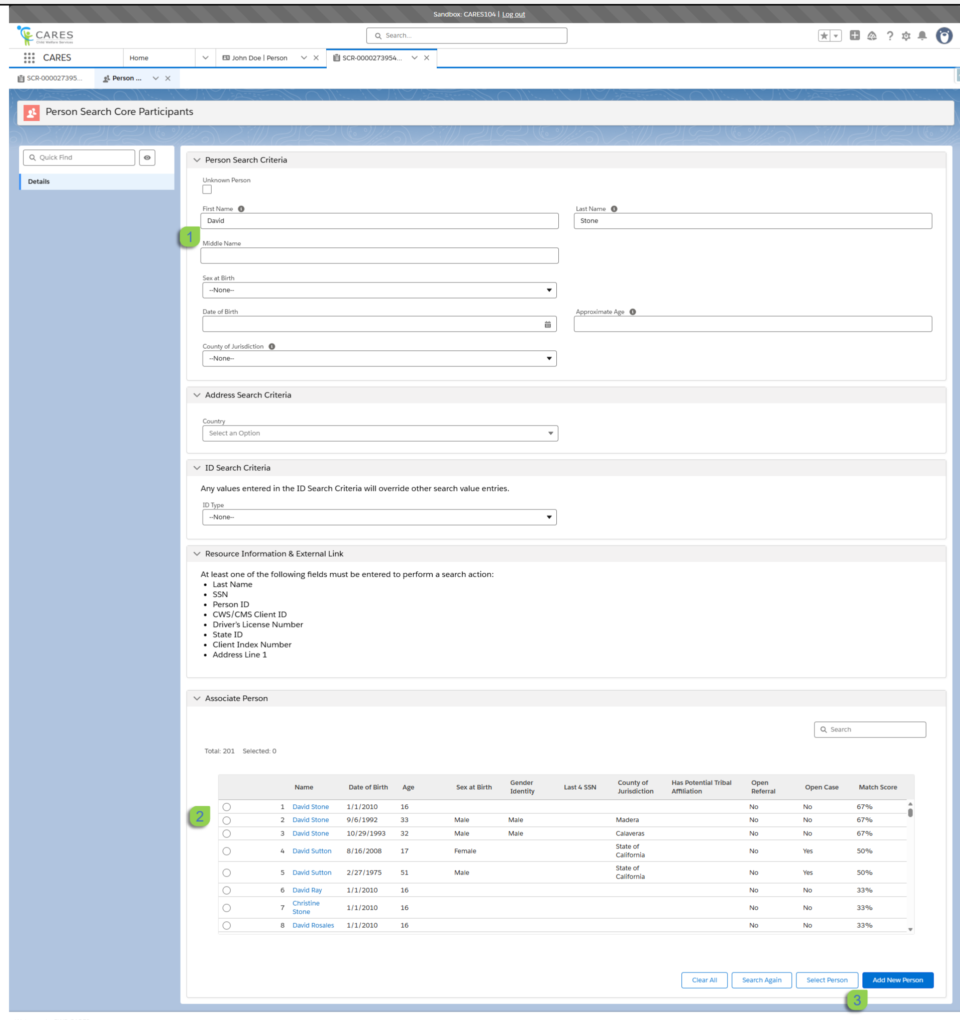
1. Search to see if individual exists first
2. If found, “Select Person”,
3. If not “Add New Person”
4. Indicate Role
5. Save, and repeat for additional participants

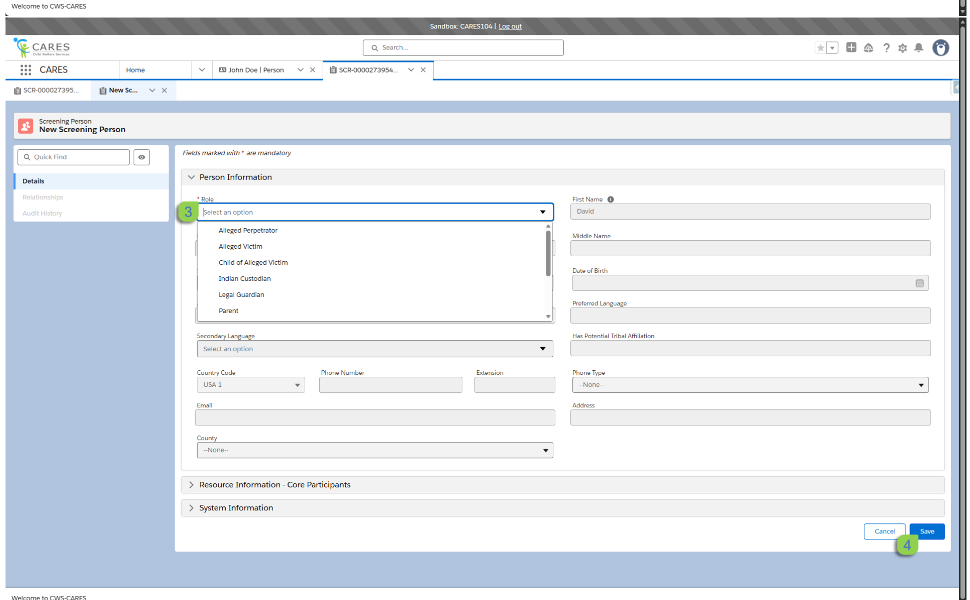
Quick Tips:

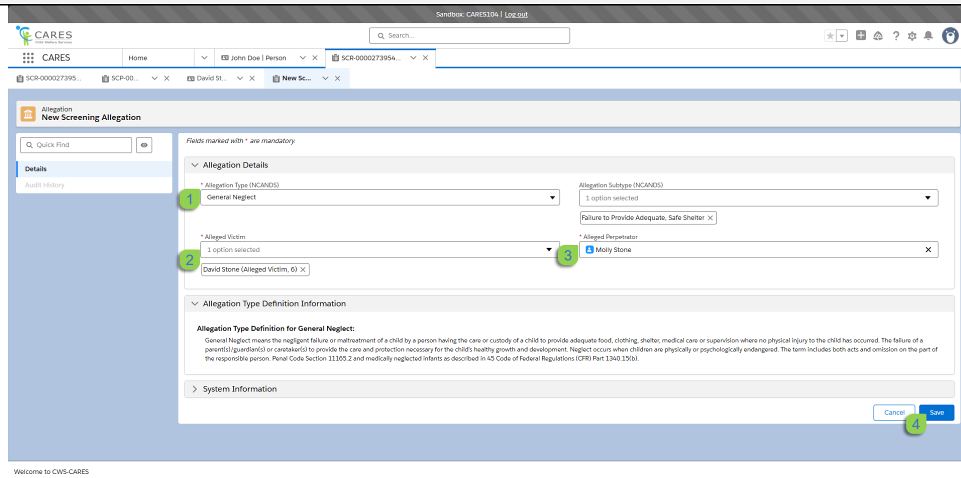
- If search result table doesn’t display enough basic information to confirm a match, click the name to open their person profile in a new sub-tab to review. Screening Person Add progress will be retained in the original sub-tab and you can return to complete the process once certain.
- At least one 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.

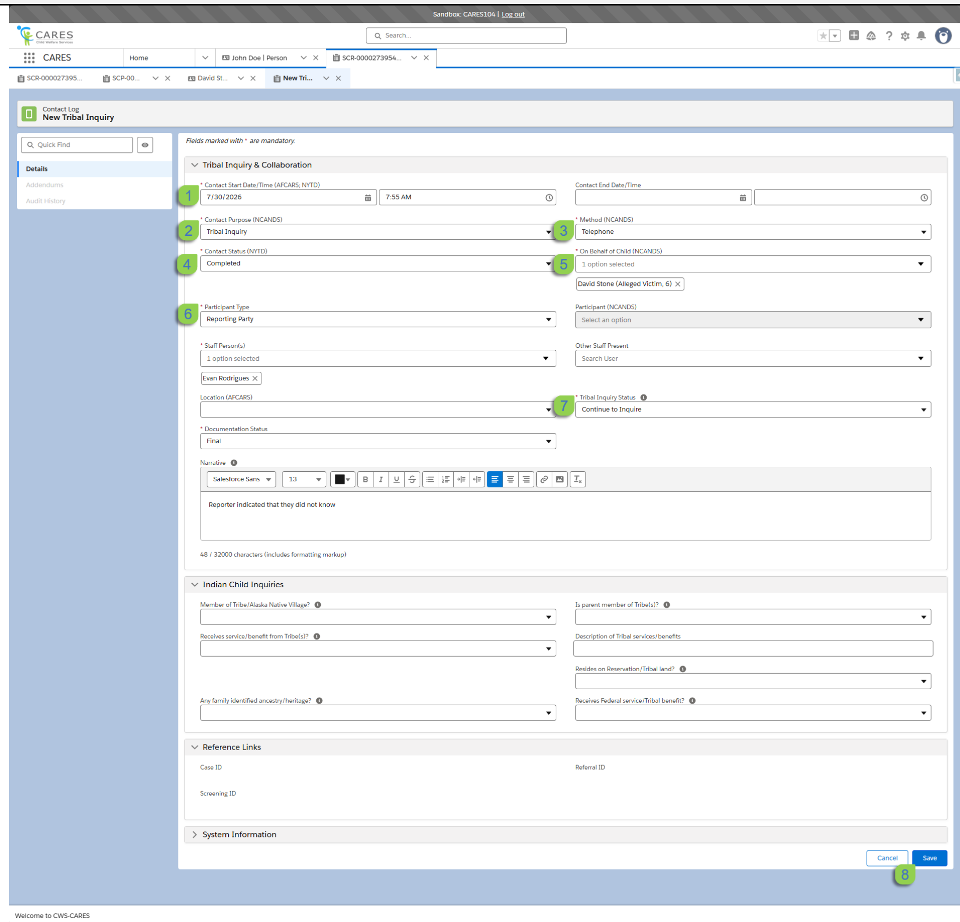
Time-savers:

- 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.

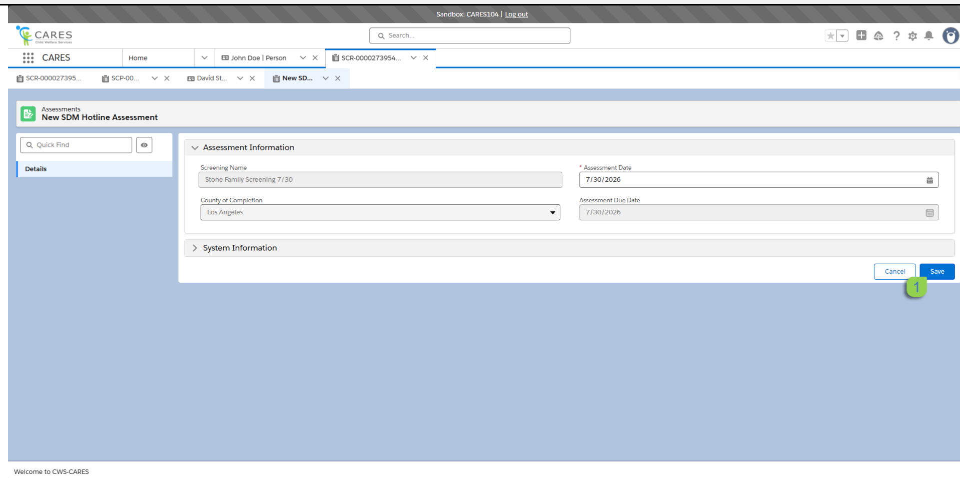
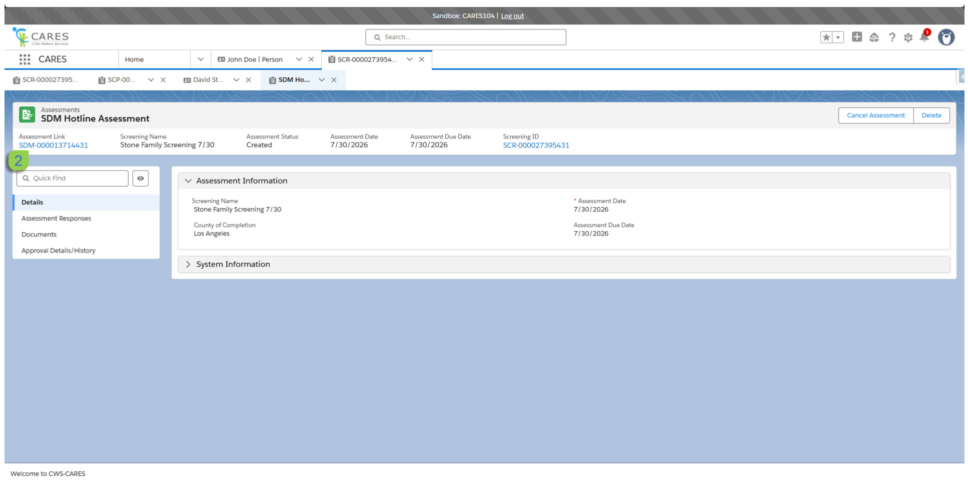




STEPS	CWS-CARES SCREENSHOT
STEP FOUR *Document Allegations* 1. Indicate Allegation Type 2. Select alleged victim 3. Select alleged perpetrator 4. Save, and repeat for additional allegations ***Quick Tips:*** • Participants are selectable by role based on who was previously attached to the screening. • 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 *Conduct ICWA Tribal Inquiry* 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.	

After the Call

STEPS	CWS-CARES SCREENSHOT
STEP SIX *Complete SDM Assessment* 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.	 

STEPS	CWS-CARES SCREENSHOT
STEP SEVEN	

Finalize Pathway

1. Confirm County Final Determination

Alternatively, if the screening is evaluated out,

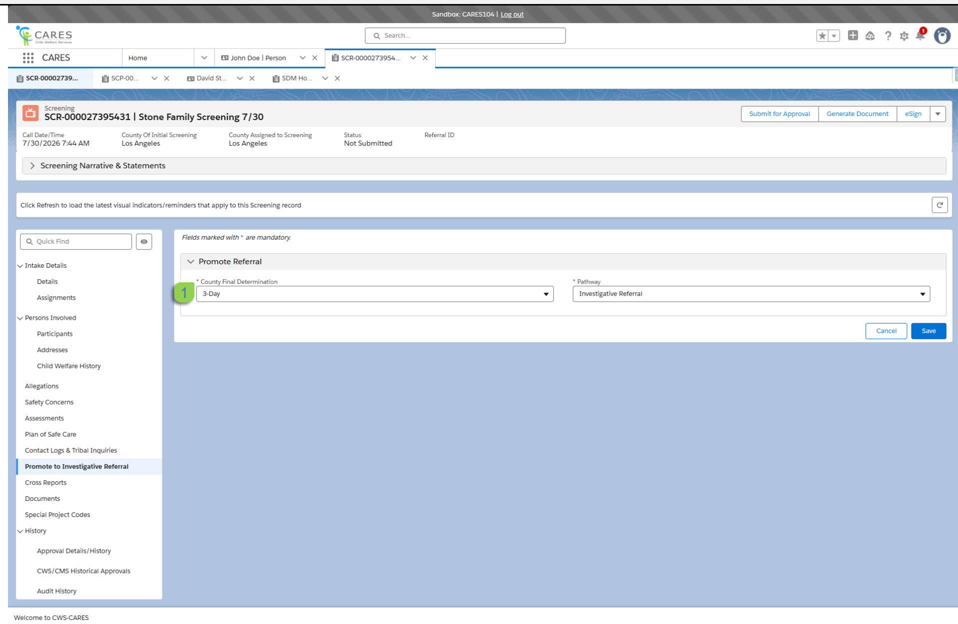
2. Select alternate pathway

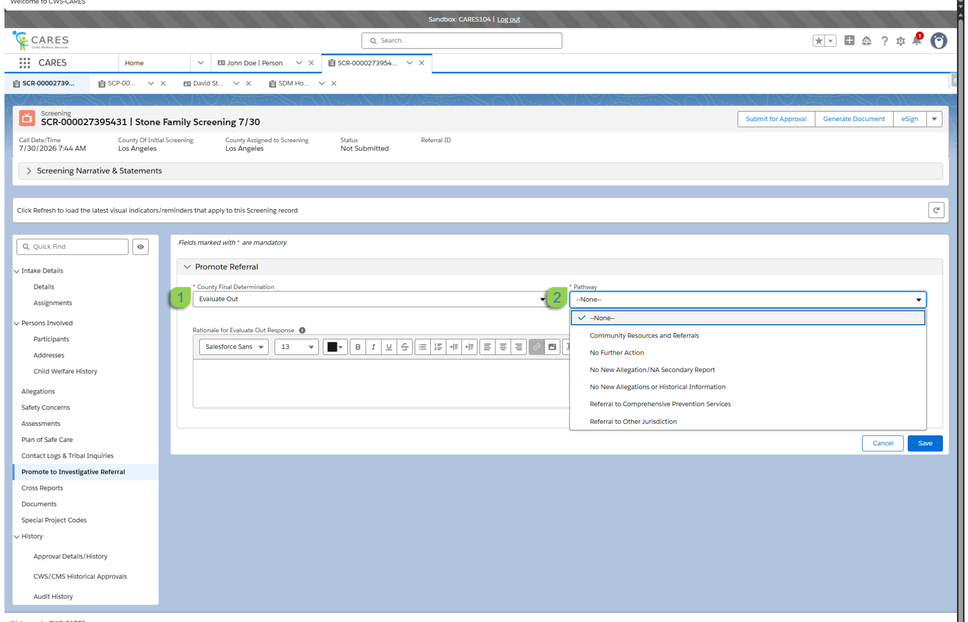
Quick Tips:

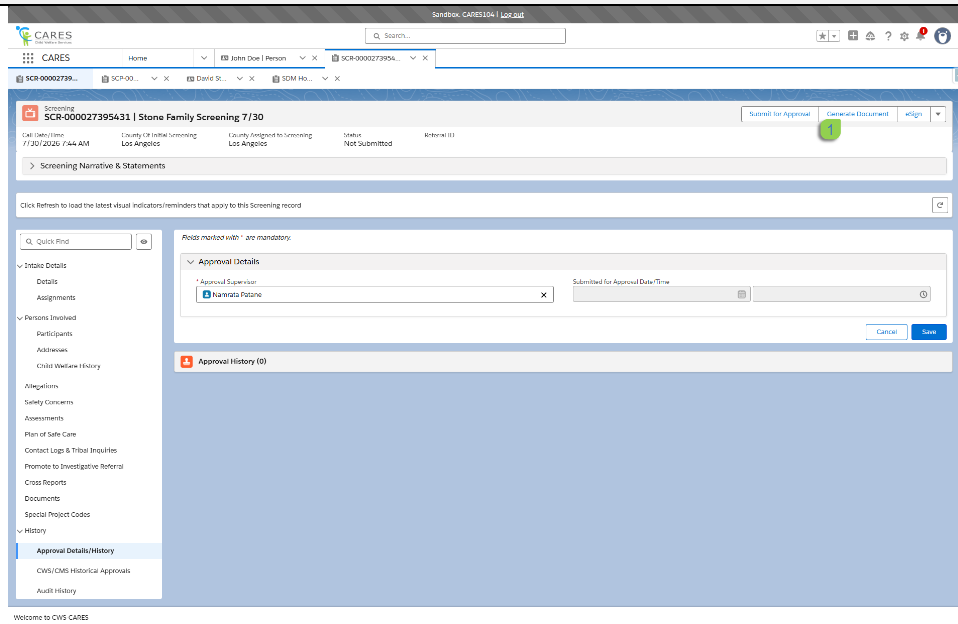
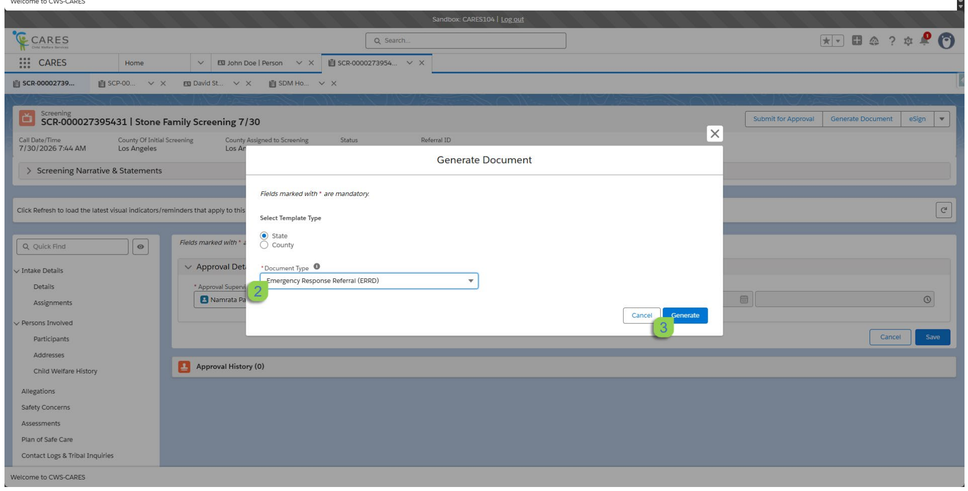
- In urgent situations, the SDM assessment can be skipped and determination/pathway directly selected.

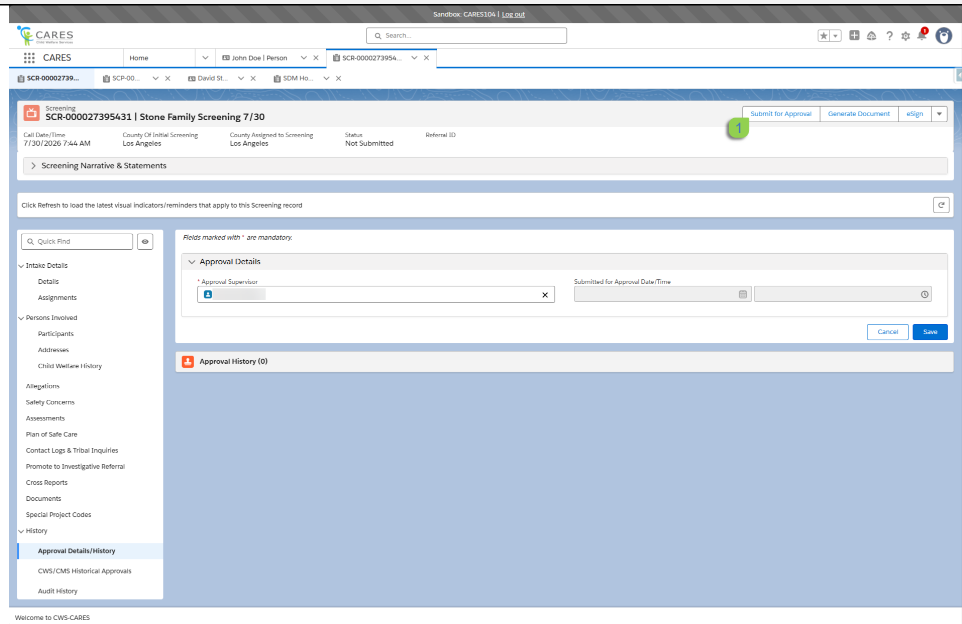
Time-savers:

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





STEPS	CWS-CARES SCREENSHOT
STEP EIGHT *Generate Documentation* 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 *Submit for Approval* 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.	

Supervisor Approval and Referral Assignment

STEPS	CWS-CARES SCREENSHOT
STEP TEN *Supervisor Approval* 1. Supervisor approves 2. 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.