

## CWS Notebook Documentation for Daily Users

With Betty Hanna, MA, MFT

### 9:30-11:30 Session 1: *Making and updating Health & Education Notebooks*

This section will emphasize how to access and use the health notebook located in the client management section of CWS/CMS in either referral or case. It will also cover:

- Using the education notebook
- Generating the health and education passport
- Recording CHDP medical and dental exams
- Recording other medical and dental visits
- Searching and creating associate service providers
- Updating the health and education passport

**Participants are encouraged to bring case information with them that they would like to enter into CWS/CMS. If possible participants should gather current education and medical information on a child to bring to class to facilitate the learning process.**

### 12:30-2:30 Session 2: *Case Plan Creation and Updating*

This section will cover updating client notebooks, creating the case plan notebook and generating the case plan document. It will also cover development of strengths based, individualized SMART objectives for clients and how to enter them into the case plan.

This session will cover updating the case plan and using the assessment section to inform the problems that require CPS intervention and the strengths of the family.

**Participants are encouraged to bring their questions and challenge areas in working in the case plan section.**

### 3:00-5:00 Session 3: *Making & Using Collateral and Service Provider Notebooks*

This session will cover creating and using collateral and service provider notebooks. It will also focus on searching techniques to easily access service providers that may already be in the CWS/CMS system.

It will go over the definition of collaterals and the many ways that they are used in CWS/CMS.

It will cover creating collaterals and service providers effectively so that they can be easily accessed in the future.

***Participants are encouraged to bring their questions and problems with using collaterals and service providers.***