

# CARES-Live Search and View Client Information Job Aid

## Purpose

The purpose of this job aid is to show you how to:

- view your assigned staff
- view the client list
- search for a client
- view a client
- view the change log



### Policy and Procedure Disclaimer:

CARES-Live training materials are designed to teach you how the system works. They do not cover policies and procedures specific to your organization, or general policy from the State about child welfare practice.

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## CANS Overview

CANS (Child and Adolescent Needs and Strengths) is an assessment tool that provides a variety of actionable assessment items to support decision making, case planning and level of care.

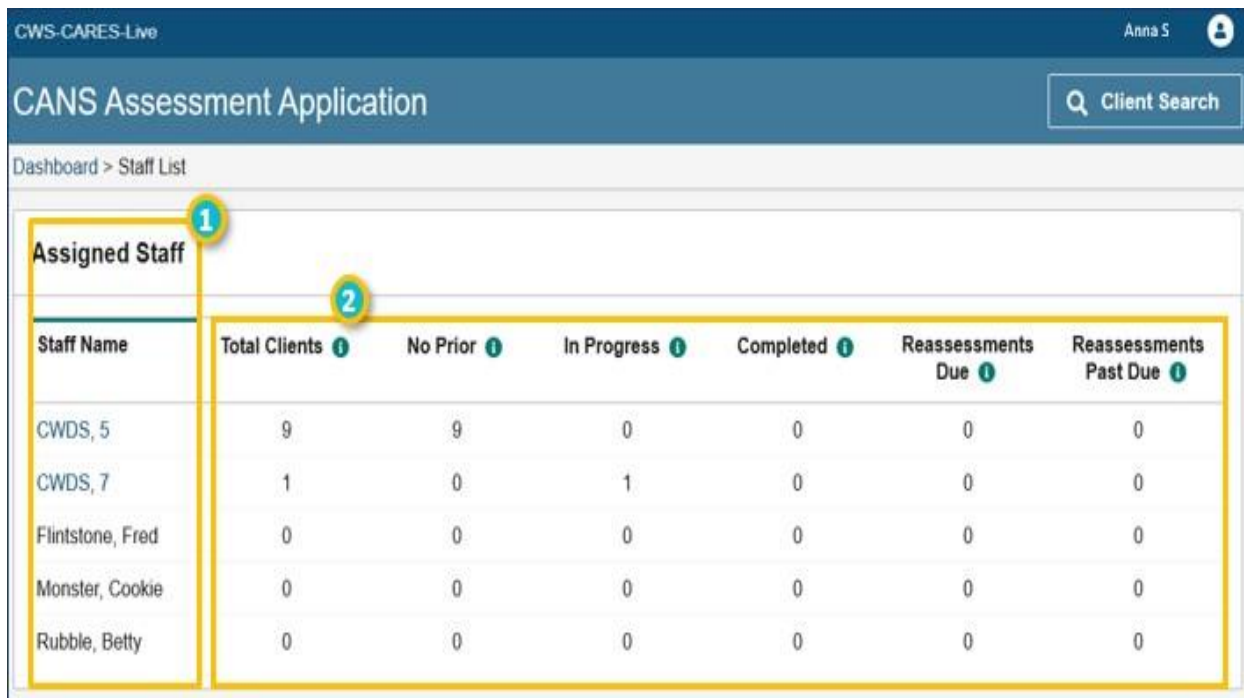
There are three different user types in CANS – Supervisors, Caseworkers, and Non- Caseworkers. Your system role and permissions determine what you will see in CARES. The table below shows what each user can see and do.


	Supervisor	Caseworker	Non-Caseworker
view assigned staff	x		
view client list	x	x	
view client	x	x	x
search for client	x	x	x
view change log	x	x	x
save/complete CANS	x	x	x
delete CANS	x	x	x



## Assigned Staff Page Elements

After Supervisors sign into CARES and click GO on the CANS tile, the Assigned Staff page displays.



CWS-CARES-Live Anna S 

**CANS Assessment Application** Client Search

Dashboard > Staff List

**Assigned Staff**

Staff Name	Total Clients	No Prior	In Progress	Completed	Reassessments Due	Reassessments Past Due
CWDS, 5	9	9	0	0	0	0
CWDS, 7	1	0	1	0	0	0
Flintstone, Fred	0	0	0	0	0	0
Monster, Cookie	0	0	0	0	0	0
Rubble, Betty	0	0	0	0	0	0

#	Description
1	Clicking on a <b>Staff Name</b> takes Supervisors to that staff person's client list.
2	The number of <b>Total Clients</b> includes that staff person's clients with <b>No Prior</b> CANS assessments, <b>In Progress, Completed</b> , as well as <b>Reassessments Due</b> or <b>Reassessments Past Due</b> CAN assessments.



Note:

The Assigned Staff page can only be accessed by Supervisors and only staff with an active caseload can be viewed.

### View Client List

After Caseworkers sign into CARES-Live and click GO on the CANS tile, the Client List page displays with primary and secondary assignments. Supervisors can also navigate to this page by following the step below.

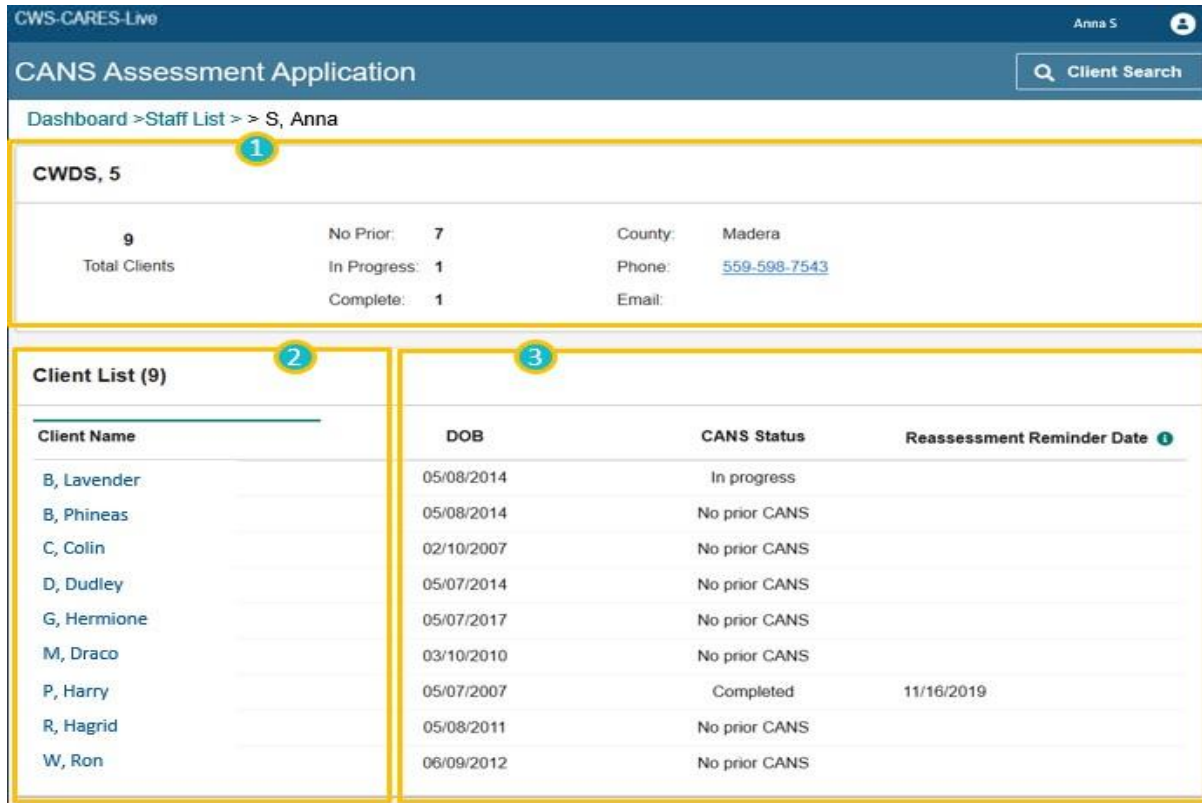


### To View the Client List:

Step	Action	Result
1	From the <b>Assigned Staff</b> page, click an active <b>Staff Name</b> . The active <b>Staff Name</b> displays as a linked name.	The <b>Client List</b> page displays.



### Client List Page Elements:



**CWDS, 5**

**9** Total Clients

No Prior: **7**

In Progress: **1**

Complete: **1**

County: Madera

Phone: [559-598-7543](tel:559-598-7543)

Email:

Client Name	DOB	CANS Status	Reassessment Reminder Date
B, Lavender	05/08/2014	In progress	
B, Phineas	05/08/2014	No prior CANS	
C, Colin	02/10/2007	No prior CANS	
D, Dudley	05/07/2014	No prior CANS	
G, Hermione	05/07/2017	No prior CANS	
M, Draco	03/10/2010	No prior CANS	
P, Harry	05/07/2007	Completed	11/16/2019
R, Hagrid	05/08/2011	No prior CANS	
W, Ron	06/09/2012	No prior CANS	

#	Description
<b>1</b>	The top portion of the page displays the <b>Total Clients</b> the Caseworker has, a breakdown of the CANS assessments for the Caseworker's clients ( <b>No Prior, In Progress, Complete</b> ), as well as their <b>County, Phone number, and Email</b> address.
<b>2</b>	Clicking on a <b>Client Name</b> takes the user to the <b>Client Information</b> page.
<b>3</b>	The client's <b>DOB, CANS Status (In progress, No prior CANS, Completed)</b> , and <b>Reassessment Reminder Date</b> (6 months after the last CANS was completed) display. The reminder will display in the <b>Reminder Date</b> column 30 days prior to the reminder date.

Note:



The Client List page can only be accessed by Supervisors and Caseworkers. The summary information in the top portion of the page (client and assessment numbers, as well as the staff member's contact information) only displays for Supervisors.

## Sorting Columns

A blue line indicates that the column is selected. Click the column header to change the sort order. The blue line will either display above or below the column header depending on the sort order. The default sort is either alphabetical order (e.g. Client Name) or most recent (e.g. Assessment Date) based on the first column on the page.

**Client List (9)**

Client Name	DOB	CANS Status	Reassessment Reminder Date ⓘ
B, Lavender	05/08/2014	In progress	
B, Phineas	05/08/2014	No prior CANS	
C, Colin	02/10/2007	No prior CANS	
D, Dudley	05/07/2014	No prior CANS	
G, Hermione	05/07/2017	No prior CANS	
M, Draco	03/10/2010	No prior CANS	
P, Harry	05/07/2007	Completed	11/16/2019
R, Hagrid	05/08/2011	No prior CANS	
W, Ron	06/09/2012	No prior CANS	

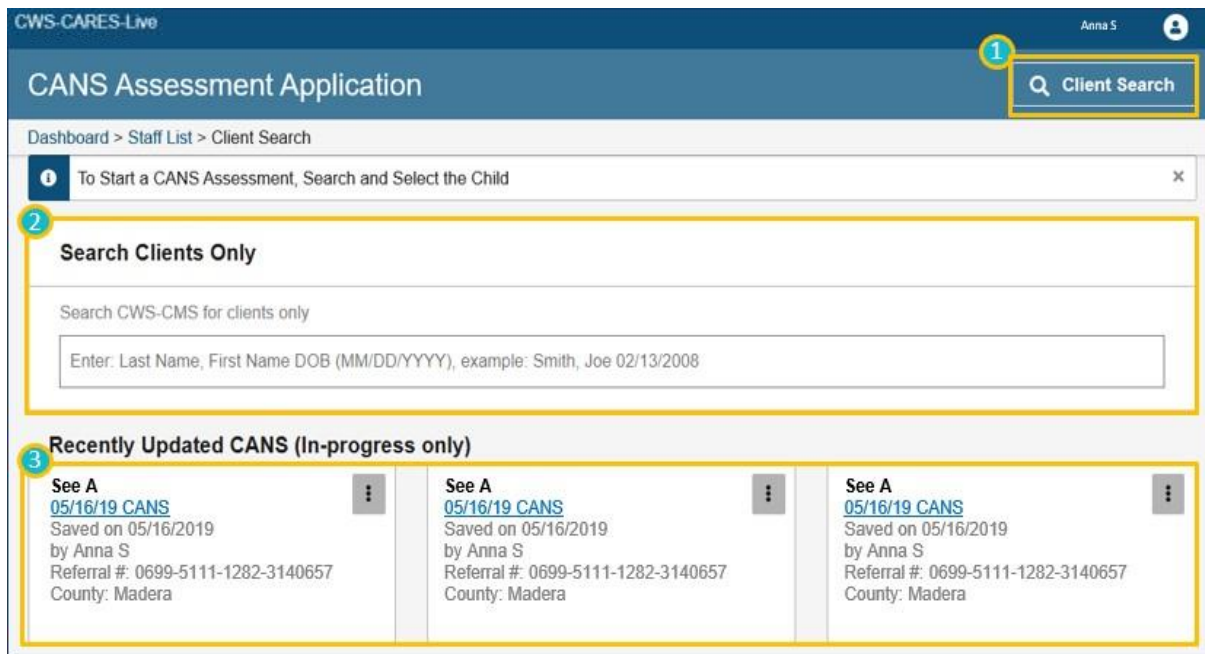
**Client List (9)**

Client Name	DOB	CANS Status	Reassessment Reminder Date ⓘ
W, Ron	06/09/2012	No prior CANS	
R, Hagrid	05/08/2011	No prior CANS	
P, Harry	05/07/2007	Completed	11/16/2019
M, Draco	03/10/2010	No prior CANS	
G, Hermione	05/07/2017	No prior CANS	
D, Dudley	05/07/2014	No prior CANS	
C, Colin	02/10/2007	No prior CANS	
B, Phineas	05/08/2014	No prior CANS	
B, Lavender	05/08/2014	In progress	



## Search Clients Only Page Elements:

After Non-Caseworkers sign into CARES-Live and click GO on the CANS tile, the Search Clients Only page displays. Supervisors and Caseworkers can also navigate to this page by following the steps below.



The screenshot shows the 'CANS Assessment Application' interface. At the top right, there is a 'Client Search' button. Below it, a breadcrumb trail reads 'Dashboard > Staff List > Client Search'. A notification banner states 'To Start a CANS Assessment, Search and Select the Child'. The main section is titled 'Search Clients Only' and contains a search input field with the placeholder text 'Search CWS-CMS for clients only' and a hint: 'Enter: Last Name, First Name DOB (MM/DD/YYYY), example: Smith, Joe 02/13/2008'. Below the search field is a section titled 'Recently Updated CANS (In-progress only)' which displays three cards. Each card shows 'See A 05/16/19 CANS', 'Saved on 05/16/2019 by Anna S', and 'Referral #: 0699-5111-1282-3140657 County: Madera'.

#	Description
1	Clicking <b>CLIENT SEARCH</b> navigates you to this <b>Search Clients Only</b> page.
2	The <b>Search Clients Only</b> card has a search field where you can search CWS-CMS for clients only.
3	The <b>Recently Updated CANS</b> card lists the last three assessments updated. Neither Completed nor Deleted assessments will display here – only In Progress assessments.



## To Search for a Client:

For best results, first search by (last name, first name) and DOB (MM/DD/YYYY). For example: Smith, Joe 02/13/2008.

Other search criteria (middle name) can be used secondarily if searching by name and DOB didn't bring up the result you were looking for or you want to narrow your results further.

Step	Action	Result
1	Click <b>CLIENT SEARCH</b> .	The <b>Search Clients Only</b> page displays.
2	Enter your search criteria into the search field.	Search results display.
3	Select the correct result from the list.	The <b>Client Information</b> page displays.

## Search Results

Search results in CANS will display the following:

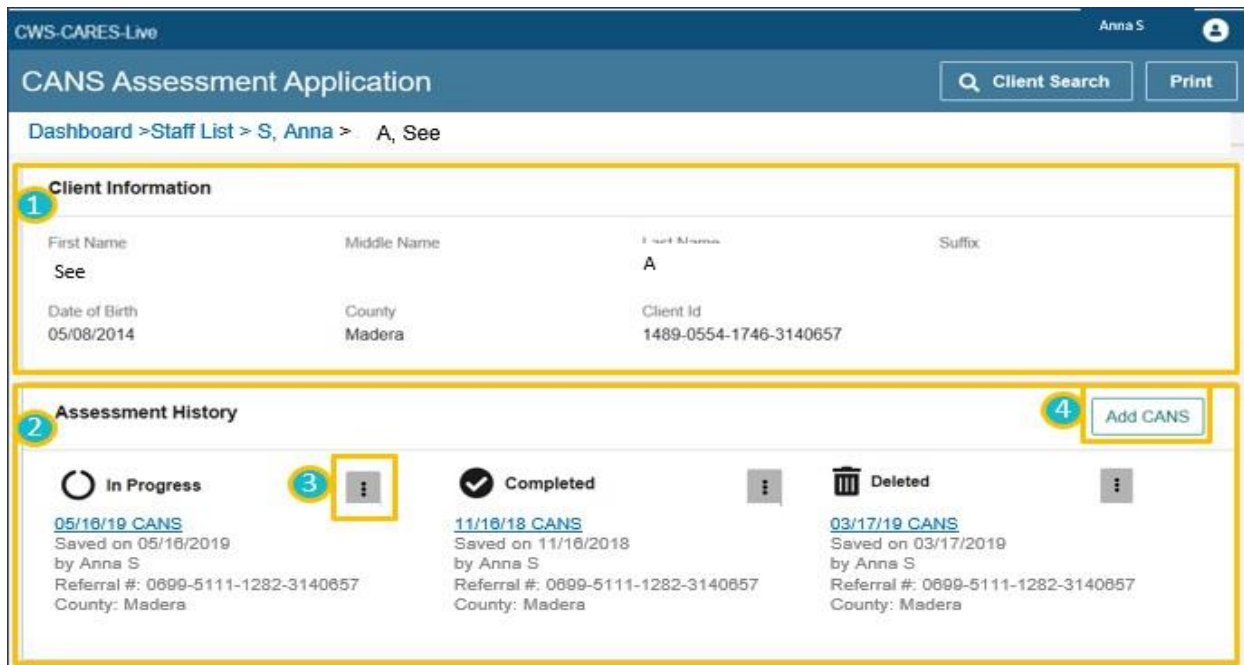
- clients only (not perpetrators, etc.)
- clients age 22 and younger

## Sealed and Sensitive Records

Access to certain records is restricted based on your user role. Sealed records are the most secure. They will not display in search results unless you are authorized to view them. Sensitive Records will appear in search results regardless of your user role. You will not be able to select Sensitive Records without the proper authorization.



## Client Information Page Elements:



**Client Information**

First Name	Middle Name	Last Name	Suffix
See		A	
Date of Birth	County	Client Id	
05/08/2014	Madera	1489-0554-1746-3140657	

**Assessment History**

- In Progress**
  - 05/16/19 CANS  
Saved on 05/16/2019  
by Anna S  
Referral #: 0699-5111-1282-3140657  
County: Madera
- Completed**
  - 11/16/18 CANS  
Saved on 11/16/2018  
by Anna S  
Referral #: 0699-5111-1282-3140657  
County: Madera
- Deleted**
  - 03/17/19 CANS  
Saved on 03/17/2019  
by Anna S  
Referral #: 0699-5111-1282-3140657  
County: Madera

**Add CANS**

#	Description
1	The <b>Client Information</b> card displays the client’s <b>Full Name</b> , <b>Date of Birth</b> , <b>County</b> , and <b>Client Id</b> .
2	The <b>Assessment History</b> card displays <b>In Progress</b> , <b>Complete</b> , and <b>Deleted</b> assessments. The following details display for each assessment: <b>Assessment Date</b> , <b>Case/Referral Number</b> , County, Last Updated date, and the name of the person that the assessment was last <b>Updated By</b> . Clicking on the <b>Assessment Date</b> navigates you back to the assessment.
3	Clicking the kebab icon (three dots) next to an assessment will display a dropdown menu with the following options: <b>View CANS Change Log</b> or <b>Delete CANS</b> . The <b>Delete CANS</b> option will only display for <b>In Progress</b> CANS assessments.
4	Clicking <b>ADD CANS</b> takes you to the <b>CANS Assessment Form</b> page where you can select and save or complete ratings for the various assessment items. This link will not display if the client is from a different county than your own as you cannot add CANS assessments for clients outside your county.



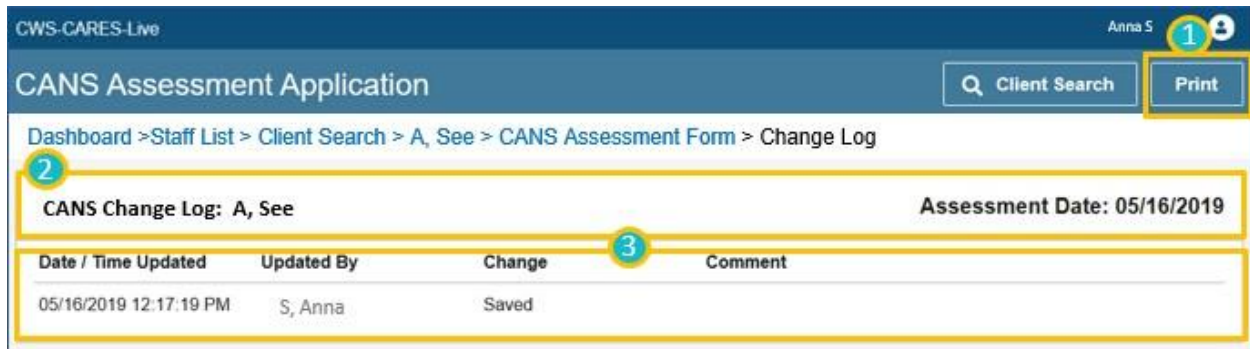


### To View CANS Change Log:

Step	Action	Result
1	From the <b>Client Information</b> page, click the kebab icon (three dots) next to the assessment for which you want to view the change log.	A dropdown menu displays.
2	Select <b>View CANS Change Log</b> from the dropdown menu.	The <b>CANS Change Log</b> page displays.



### CANS Change Log Page Elements:



#	Description
1	Click <b>PRINT</b> to print the change log.
2	The client's name displays along with the <b>Assessment Date</b> .
3	The change log displays the following information about the assessment: <b>Date/Time Updated</b> , <b>Updated By</b> , the <b>Change</b> made (Saved, Completed, or Deleted), and any <b>comment</b> added to reflect why the change was made.

## On Demand Training

Continue your learning experience by choosing from the CARES-Live training materials available to you on demand!

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### Watch it



#### **Search and View Client Information Demo Video**

Access this video to watch processes in action!

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### Do it!



#### **Complete a CANS Assessment Web-based Training (WBT)**

Access this WBT for a hands-on experience!

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## **CARES-Live Support**

If you need help using CARES-Live, follow your organization's process for requesting assistance.

Is This Job Aid Helpful?

If you have questions or suggestions regarding this Job Aid please [send an e-mail to CWDS Implementation Training \(osicwdstraining@osi.ca.gov\)](mailto:osicwdstraining@osi.ca.gov).