

CARES-Live Facility Search & Profile Job Aid

Purpose

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

- Perform a facility or home search
 - View facility or home profile details
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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.

Facility Search Overview

Facility Search displays data from CWS/CMS, LIS (Licensing Information System) and FAS (Field Automation System), including children placed in facilities, and any complaint history in a single location.

It provides an at-a-glance view on one screen and:

- Allows authorized users to search for and view pending and approved children's residential licensed facilities and county-approved homes, along with contact information and the responsible licensing or approval worker
 - Displays the number of beds, complaint history, and children currently associated to a facility or home
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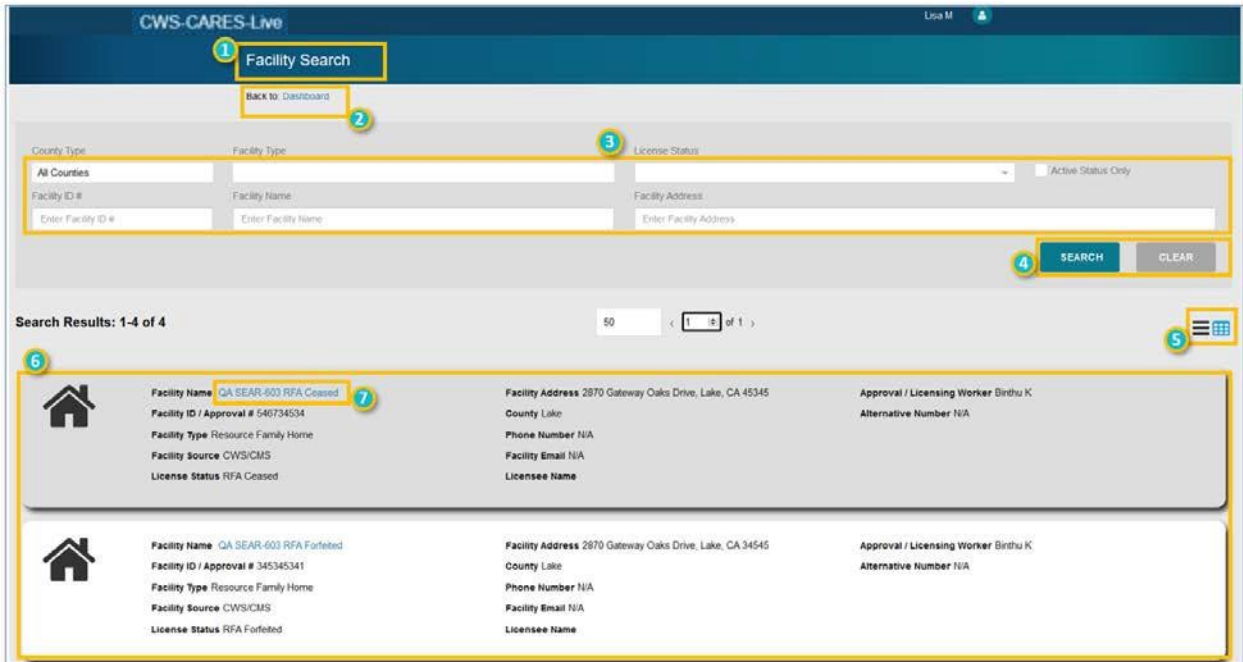


Note:

Facility Search is a read-only feature. Your use of search will not affect CWS/CMS, LIS or FAS data in any way.



Facility Search Page Elements:



The screenshot shows the CWS-CARES-Live Facility Search interface. It includes a header with the user name 'Lisa M', a search bar, and a search form with fields for County Type, Facility Type, License Status, Facility ID #, Facility Name, and Facility Address. Below the search form are search results for two facilities, each with a home icon and detailed information including Facility Name, ID, Type, Source, License Status, Address, County, Phone, Email, and Licensee Name.

#	Description
1	The Page Name information is dynamic and displays on the left of the Page Header .
2	Breadcrumb navigation at the top of the page allows you to return to the previous page.
3	There are six fields including a check box available to enter search criteria.
4	The Search button executes a search, and the Clear button clears out all search criteria.
5	The Grid icon and List icon allow you to change how results are displayed.
6	The Facility Cards contain basic identifying information for a facility or home.
7	The Facility Name link allows you to view the facility or home profile page, which can include details such as children placed and complaint history if available.

Completing a Facility or Home Search

You can search for any facility in the system. Basic searches are performed using the six most common search criteria. The following information, if available, is displayed on each facility card:

- Facility Name (which is also a link to the facility profile)
- Facility ID/Approval #, Facility Type, Facility Source, and License Status
- Facility Address, County, Phone Number and E-mail, and Licensee Name
- Approval/Licensing Worker and Alternative Number

You can search using partial information for Facility Name and Facility Address including street name, city, house/building number, or zip code. You may also use special characters in the Facility Name field. County Type field provides the option to search **All Counties**.

New Concept: License Status Options



- Newly added RFA values in License Status Filter
 1. RFA Ceased
 2. RFA Forfeited
 3. RFA Rescinded
 4. RFA Surrendered
 5. RFA Withdrawal has been renamed to RFA Withdrawn



Note:

If “**Active Status Only**” is selected the drop-down menu will be disabled on the License Status Filter. Additionally, the functionality you see is determined by your role and permissions within CWS/CMS and **CARES-Live**.



To Search for a Facility or Home

Step	Action	Result
1	From the Services & Resources page, click GO on the CALS (Facilities) tile.	The Facility Search page displays.

2	Enter valid search criteria and click Search .	Search Results display.
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Modifying Search Results

Change Display of Results

By default, search results are displayed as individual cards. You can also choose to display search results in a table.



To Change How Results Display:

Step	Action	Result
1	Click the Grid icon to display results in a grid format.	The results display in a grid or table format. (The columns can be resized).
2	Click the List icon to display results listed as individual cards.	The results display as individual Facility Cards .

Change Search Results

You can alter search results by changing or adding basic search criteria.



To Change Search Criteria:

Step	Action	Result
1	After completing a search, click Clear .	All previously entered search criteria is removed, except the County. (County selection will return to the default county based on your login information).

Viewing a Facility or Home Profile

From the search results, you can click on the Facility Name link to view the facility's or home's profile. The following information, if available, is displayed in the profile:

- Facility/Home Name, Name of Licensee/Parents, Assigned Oversight Agency
- License Number/Family ID, Status, License/Approval Effective Date, Application Received Date
- Capacity, Adjusted Capacity, Available Beds, and Capacity Last Changed
- Physical and Postal Address and County Name, Primary and Alternative Phone Number, Last Visit Date and Last Visit Reason
- Licensing/Approval Worker, phone, and e-mail
- Children currently place in facility (displays only if applicable)
 - By clicking a column header in this section, the list will sort based on information under the column (name, age, date of placement, etc)
- Complaint History (displays only if applicable)
 - If complaint history is available, you can click the expand arrow to view additional details about the complaint (type/code, allegation description, and resolution code)



New Concept: Complaint History as of Date

- Complaint History date added to facility profile to indicate the recency of the complaint data being updated from the FAS (not applicable for children or facility details because that information is pulled real time from LIS and CWS).



Note:

Complaints permission has been provided allowing administrators to remove this function for specific users if needed. Complaints will automatically be disabled when a user does not have the permission or when CARES-Live complaint history updates from the FAS fails.



To View a Facility or Home Profile:

Step	Action	Result
1	Click a Facility Name link.	The facility's profile page displays. (Scroll to review the information).

On Demand Training

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

Watch it!



Facility Search & Profile Demo Video

Access this video to watch processes in action!



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).