

CARES-Live Snapshot Job Aid

Purpose

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

- Search for a client
- Add a client
- Review basic client demographics
- Review relationships
- Attach a client from the Relationship Card
- Review history of involvement with Child Welfare Services (CWS)
- Copy and paste history information elsewhere



Policy and Procedure Disclaimer:

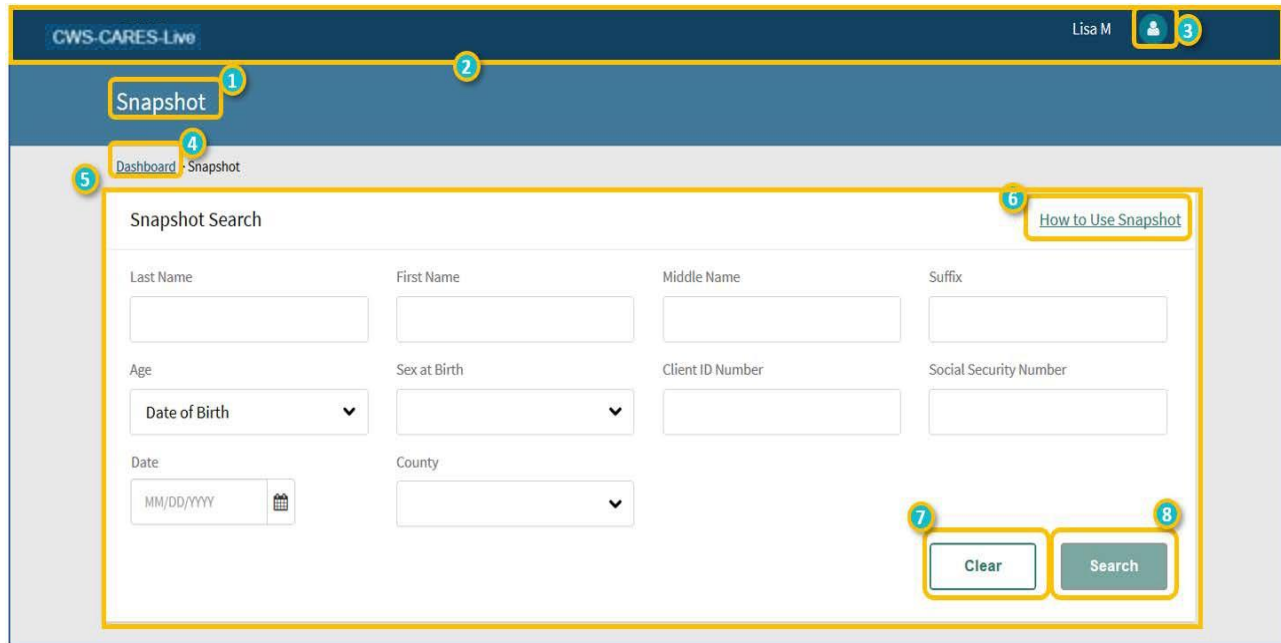
CARES-Live training materials are designed to teach you how the system works. They do not cover policies and procedures specific to your organization, or general policy from the State about child welfare practice.

Snapshot Overview

The Snapshot feature is a tool that allows you to search for clients who exist in CWS/CMS (individuals who have current or prior involvement with child welfare system). This is a quick view of a client's basic demographics, known relationships and their CWS history. Search results display in a grid format allowing you to adjust column sizes, and sort results by any column in the results table. You may hover over the information icon (ⓘ) for more details. When ready, you can copy and paste history information to an external document (i.e., investigative narratives, Word documents).



Snapshot Page Elements



The screenshot shows the 'Snapshot Search' form in the CWS CARES-Live system. The interface includes a top navigation bar with the user name 'Lisa M' and a user icon (3). Below the navigation bar is a 'Snapshot' header (1) and a breadcrumb trail 'Dashboard > Snapshot' (4). The main search area (5) contains several input fields: Last Name, First Name, Middle Name, Suffix, Age (with a 'Date of Birth' dropdown), Sex at Birth (with a dropdown), Client ID Number, Social Security Number, Date (with a calendar icon), and County (with a dropdown). A 'How to Use Snapshot' instruction card (6) is positioned above the search buttons. At the bottom right of the form are 'Clear' (7) and 'Search' (8) buttons.

#	Description
1	The Page Name displays on the left side of the page header.
2	The Global and Page Headers display on all pages in CARES-Live to provide certain global and page specific features. The Headers stick to the top of the page when you scroll down.
3	The User icon allows you to logout.
4	Breadcrumbs allow you to identify your current location within CARES by providing a clickable trail of proceeding pages to navigate by.
5	Use the Search Card to search for clients who exist in CWS/CMS.
6	The Instruction Card summarizes how to use the Snapshot feature.
7	The Clear button removes any added client information so you can start over.
8	The Search button returns the search results records.

Starting Snapshot

To get started, you need to access the Snapshot feature from the Services and Resources page.



Note:

Access to features in CARES-Live may depend on your role and system permissions.



To Start Snapshot:

Step	Action	Result
1	From the Services and Resources page, Click Go on the Snapshot tile.	The Snapshot Dashboard page displays.
2	Click Start Snapshot .	The Snapshot page displays.


Searching for and Adding a Client to the Snapshot

Adding clients to Snapshot starts from the Search Card. Client search criteria is entered in the Search Card. From here, you can search CWS/CMS for a client’s involvement in child welfare system.



New Concept: Enhanced Search Results

- Additional fields included to narrow search results
 - County
 - Sex at birth
 - Suffix
 - Middle Name
 - Approximate Age
 - Client Id
 - Social Security Number
- Best matches display from top to bottom based on your criteria
- Search results display in grid format
- Tilde (~) indicates DOB is approximate
- Columns may be resized

- Ability to sort results by any column
- Sensitive records display with an icon () next to the name
- Search rows maybe increased to maximum of 100
- To view more results, click Next at the bottom of the results list
- To go back click Previous at the bottom of the results list

Search Criteria Tips & Information

Text must be entered in one of these four fields: Last Name, DOB, SSN, or Client ID to enable search. You can search for client records using any combination of the following criteria:

- Last Name, First, Middle, and Suffix (Last Name must have at least one character to enable the search button)
- Date of Birth (DOB) or Approximate Age
- Social Security Number (SSN)
- Client ID Number
- A search may be initiated exclusively by entering either the Social Security number or Client ID number or DOB.



To Search for and Add a Client:


Step	Action	Result
1	Enter criteria on the Search Card .	Your search results grid return a list of client records matching your criteria.
2	Select a client record from your search results grid.	The Person Card page displays the added client’s information.



Note:

Maximum number of results displayed for a search is 250 records. If more than 250 results, you will be prompted to refine your search however, the first 250 results will display.

Sealed and Sensitive Records

Access to certain records are restricted based on your user role. Sealed records are the most secure. They will not display in the search results grid unless you are authorized to view them. Sensitive Records will appear in the search results grid marked with an () icon. However, you will not be able to select Sensitive Records in the Snapshot without the proper authorization



Note:

If your role does not allow you to select Sensitive Records in Snapshot an error message displays stating, "You are not authorized to add this person."

Reviewing Basic Client Demographics

You can view basic client demographics from their Person Card. All active (non-end date) types of addresses are displayed. All active types of addresses display in order by:

1. Placement Home
2. Residence
3. Common
4. Homeless
5. Penal Institution
6. Work
7. Residence
8. Daycare
9. Other



To View Client Demographics:

Step	Action	Result
1	Click a client's name in the search results grid.	The client's Person Card displays.

Reviewing Relationship Information

Each client’s known relationships display on the Relationships Card.



To View Relationships:

Step	Action	Result
1	Click the Relationships Card Link.	The Relationships Card displays.

Attaching Clients from Relationships

If you need to add clients from the relationships, you can use the Attach link displayed on the Relationships Card.



To Attach a Related Client:

Step	Action	Result
1	Click the Relationships Card Link .	The Relationships Card displays.
2	Click a client’s Attach link.	The Snapshot page displays the attached client’s information.

Removing Clients

Each client Person Card contains a red link to remove any attached clients from your Snapshot. The remove red link displays once another person is attached.



To Remove a Client:

Step	Action	Result
1	Click the client's Person Card link.	The client's Person Card displays.
2	Click Remove .	The Snapshot page no longer displays the client's information.



Note:

If the focus client is accidentally removed you can reattach them from the Relationships Card.

Reviewing the History of Involvement with CWS

The History Card contains the client's referral and case history with CWS.

The referral history includes the victim and parents. It also shows the alleged perpetrator, the allegations, and the conclusion of those allegations

The case history includes focus child, full, half and step siblings; adopted, alleged, birth, presumed and stepparents.



To Review the History of Involvement:

Step	Action	Result
1	Click the History Card Link.	The History Card displays the history of involvement.

Copying History Information

The History Card allows you to copy and paste history information elsewhere depending on your business needs (i.e., investigative narratives).



To Copy and Paste History Information:

Step	Action	Result
1	Click Copy History .	The copied information highlights on History Card .
2	Open a document and then paste.	The copied history information displays.

Starting Over

If you need to start Snapshot over, you can use the Clear button to remove any added client information.



To Start Over:

Step	Action	Result
1	Click Clear	Snapshot page no longer displays client results grid.



Note:

If you are viewing the Person Card, you will need to click the **BACK To RESULTS** button or use the breadcrumb link "Search Results" which allows users to go back to the search grid and or start over.

On Demand Training

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

Watch it!



Snapshot Demo Video
Access this video to watch processes in action

Do it!



Introduction to Snapshot Web-based Training (WBT)
Access this WBT for a hands-on experience!

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).