DOCUMENTING POSTSECONDARY EDUCATION SUPPORT PERSONS IN CWS/CMS

CLIENT MANAGEMENT SECTION (Blue)

→ **<u>Who are CWS/CMS Collaterals?</u>**

- Individuals and agencies who provide support to clients and information about the case. They are people who have a unique relationship with a specific client or family.
- They are NOT a shared resource in CWS/CMS, which means that you do not have to search for them in order to attach them to a case. Examples of collaterals are child, advocates, grandparents
- In this case, the collateral that will be identified/created will be **<u>a POSTSECONDARY EDUCATION SUPPORT PERSON</u>** who includes the child's high school counselor, Court Appointed Special Advocate, guardian, or other skilled adult individuals

→ **<u>How do I attach a Collateral to a specific client's CWS/CMS case?</u>**

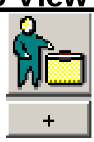
- Open the **Collateral Notebook (Blue Section)** to verify that the person is not already attached to the case.
- After creating a new Collateral, you can use the provider in a CWS/CMS notebook.

PART 1 - CREATING NEW COLLATERALS

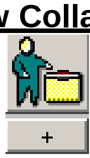
Client Management Section (Blue)

Before you create a new collateral, you should verify that the individual is not already attached to the case. This prevents the duplication of collaterals.

<u>Checking to View If the Collateral Already Exists In a Case:</u>

1. Click  to "Open Existing Collateral" Notebook.
2. Click on the appropriate client's name in the top grid and you will see the attached collateral for that person in the bottom of the grid. (If nothing appears in the bottom grid, no collaterals are attached to the highlighted client).

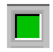
<u>Creating a New Collateral:</u>

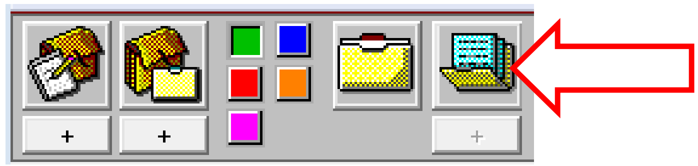
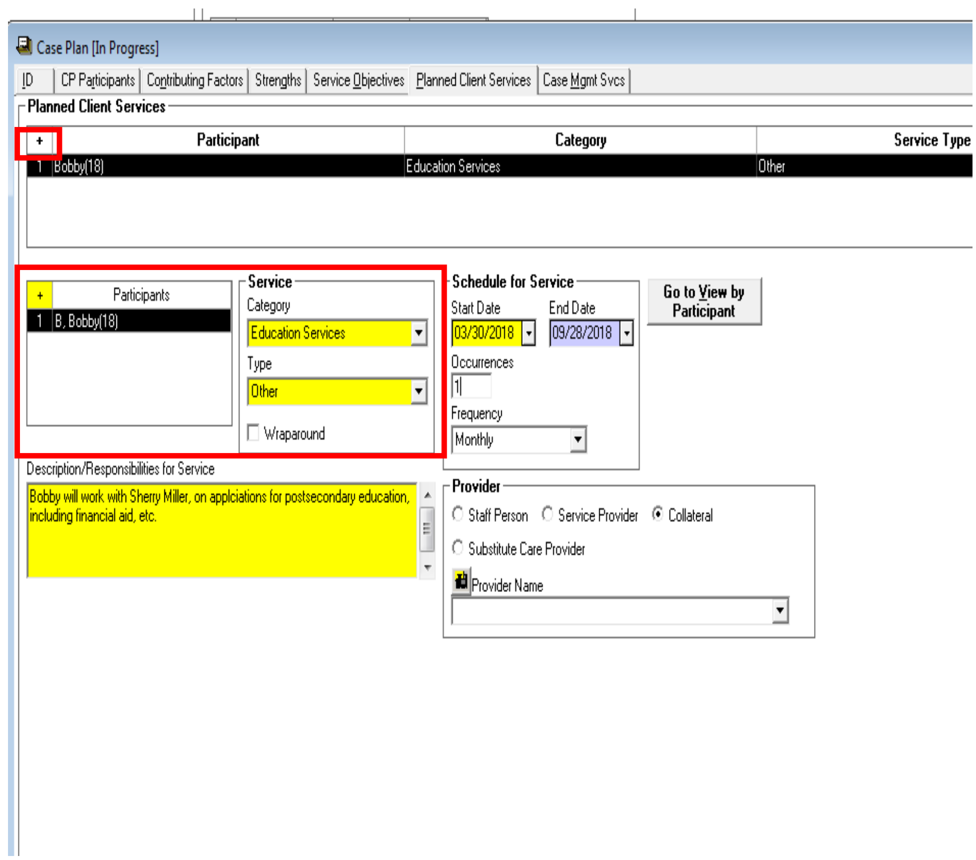
3. Click the  [+] plus to "Create New Collateral" Notebook.
4. Complete all three (3) pages and their fields as indicated:
   a) **<u>ID Page</u>:** Name, Agency, Phone
   b) **<u>Address Page</u>**
   c) **<u>Related Clients Page</u>**: Tell CWS/CMS the relationship (Note: You can relate one collateral to multiple clients in the same case)

<u>Once you have created the Collateral, they are automatically attached to the case and ready for you to use:</u>

5. Click back to the notebook where you need to use the collateral and s/he should now be available in the drop-down list of collaterals.

PART 2 - ADDING A POSTSECONDARY EDUCATION SUPPORT PERSON TO AN EXISTING CASE PLAN

Client Services   **Case Management Section (Green)**

1. From Client Services, open the appropriate case. Click *Open Existing Case Plan*.	
2.  Click the "**+**" in the **Planned Client Services** grid to open the dialog box. Next, select/highlight *Participant(s)*, choose "Education Services" from the *Category* drop down list, and choose "Other" from the *Type* list.	

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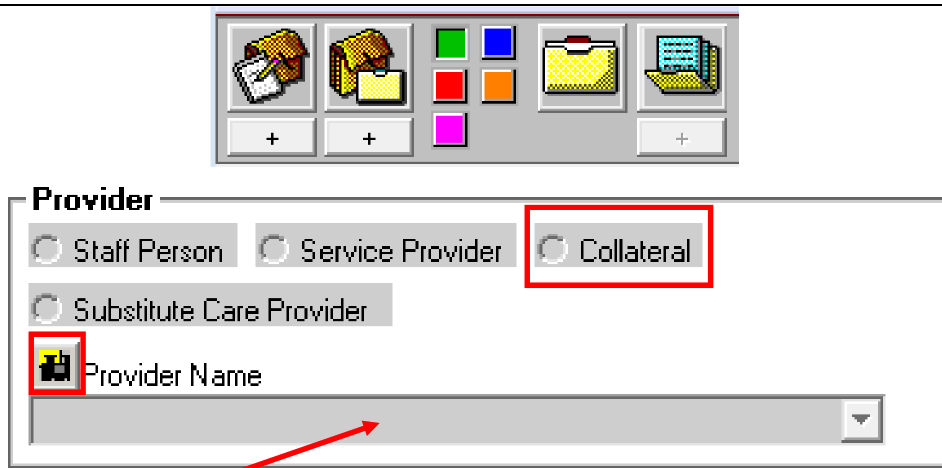
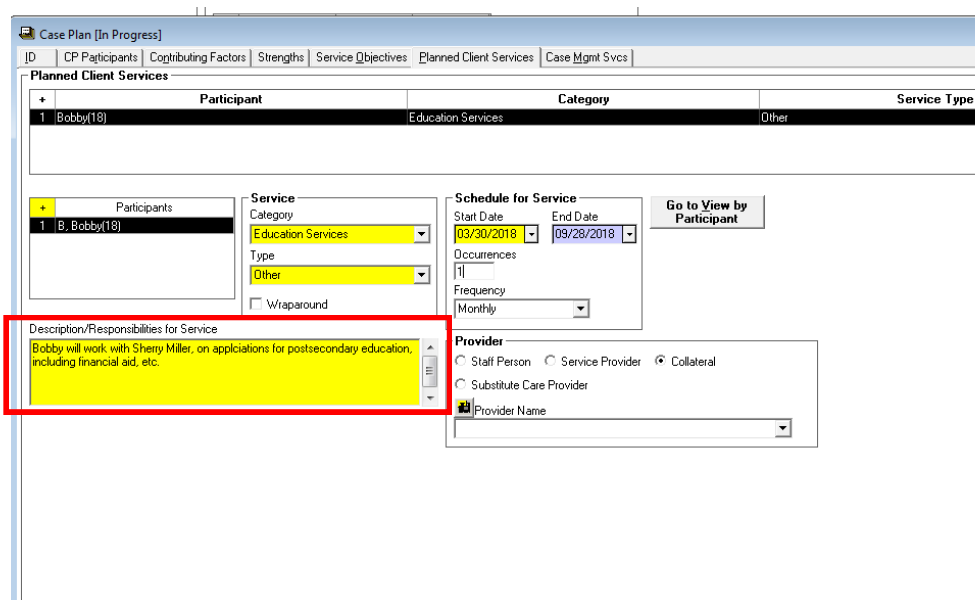
3. In the *Provider* frame on the Planned Client Services tab, Click "Collateral" from the Provider type radio button list. 4. Click on the  to perform a **Search** for the *Provider Name*, which in this case would be the COLLATERAL Provider. 5. Select the *Provider Name* from the drop- down menu.	
6. Once the Collateral Provider is identified, complete the *Description/ Responsibilities for Service* and indicate the name of the child and the person who the child will work with in completing necessary post-secondary applications, including financial aid, on an as-needed basis. **Note this is a required field and must be completed.**	

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7. Once the *Descriptions/ Responsibilities for Services* field is completed, enter the ***Start Date*** in the *Schedule for Service* frame. The system will automatically fill in the end date, which is six (6) months from the start date.