

# Creating a Contact

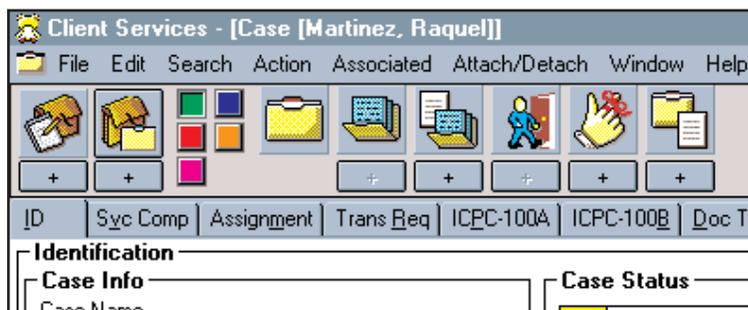
Documenting your contacts with clients and others involved in the lives of the families on your caseload is crucial to good case management and social work.

Recording accurately in CWS/CMS can provide any child welfare worker in the state with information they may need to make informed decisions about the welfare and safety of a child.

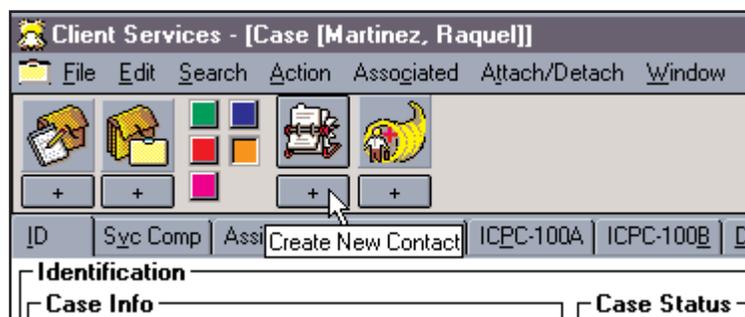


**Before you create a new contact, you must have retrieved from the database the referral or case(s) for the children on whose behalf you made the contact.**

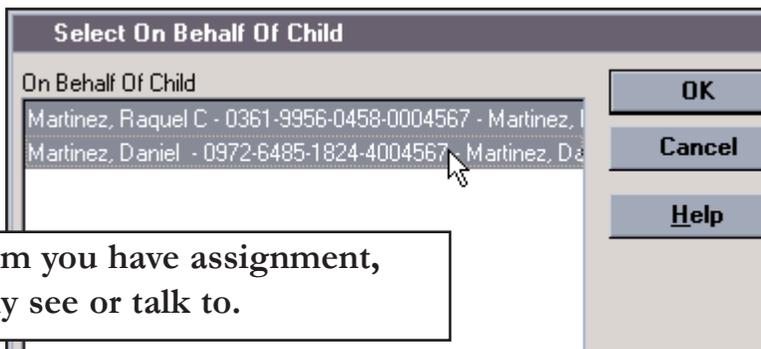
1. Click on the orange button to go to the Service Management Section.



2. Click on the Create New Contact button.



3. When the Select on Behalf of Child dialog box appears, select all the children for which this contact was made. Click OK.



Select all children for whom you have assignment, NOT just who you actually see or talk to.

4. Complete the fields on this page to document your contact.

**Contact Information**

Staff Person: Trainee, Student | Start Date: 12/02/2002 | Start Time: 09:30am | End Date: 12/02/2002 | End Time: : am

Contact Purpose: Deliver Service to Client | Method: In-Person | Location: In Placement | Status: Completed

**Participants** (+)

On Behalf of Child		
1	Martinez, Daniel	09
2	Martinez, Raquel C	03

**Contact Party Type** (+)

**Case Management Service Type**

(See Page 3)

To record who you actually had contact with, click the + in the yellow box in the upper left corner of the Participants grid. This will open the Select Participants dialog box.

These two fields should populate automatically from the information you enter.

**Select Participants**

Participant Type: Clients

Participants:

- Martinez, Raquel C (18)
- Martinez, Raul (44)
- Martinez, Theresa (42)
- Martinez, Daniel (12)

OK | Cancel | Help

If the participant(s) are not clients (i.e. Substitute Care Providers, Collaterals, etc.), change the drop-down list at the top of this box to change categories.

Select everyone you had actual contact with in the course of this contact. This includes written, telephone, FAX, and E-mail as well as in-person contact.

Contact | Associated Services | Associated Visits

**Contact Information**

Staff Person: Trainee, Student | Start Date: 12/02/2002 | Start Time: 09:30am | End Date: 12/02/2002 | End Time: : am

Contact Purpose: Deliver Service to Client | Method: In-Person | Location: In Placement | Status: Completed

Participants		
1	Martinez, Daniel	12
2	Martinez, Raquel C	18

On Behalf of Child		
1	Martinez, Daniel	09
2	Martinez, Raquel C	03

Contact Party Type	
1	Staff Person/Child

Case Management Service Type

Click on this + to record services provided to your client during this contact. You can only use this field if you have marked this contact Completed in the Status field.

Narrative

In the Narrative field, record the details of your contact.

Contact | Associated Services | Associated Visits

**Contact Information**

Staff Person: Trainee, Student | Start Date: 12/02/2002 | Start Time: 09:30am | End Date: 12/02/2002 | End Time: : am

Contact Purpose: Deliver Service to Client | Method: In-Person | Location: In Placement | Status: Completed

Participants		
1	Martinez, Daniel	12
2	Martinez, Raquel C	18

On Behalf of Child		
1	Martinez, Daniel	09
2	Martinez, Raquel C	03

Contact Party Type	
1	Staff Person/Child

Case Management Service Type

Narrative

**Remember: Repeat this procedure to create a new Contact for every occurrence in which you make contact with a client, collateral, service provider, substitute care provider, or anyone else that provides information concerning your clients.**