

CWS/CMS Client Information

(Revised 02/04/2019)

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Policy

All cases must contain complete information vital to case planning and service delivery. All CWS/CMS cases must include information in the CWS/CMS Client Notebook about any person involved in either a referral or case, who may receive CWS services.

SW Responsibility

The assigned SW is responsible for completing and updating all client information in the CWS/CMS Client Notebook as soon as the initial contact with family members has been completed. This information should include family composition, location of family members, health insurance coverage, citizenship, etc. Any missing information must be added as soon as it becomes known. The Client Notebook should also be updated as soon as the SW learns of any changes in client information.

The Field Worksheet for Updating Client Demographics was created to record demographic information when a SW is in the field. The assigned SW is responsible for completing the Field Worksheet on all referrals and cases. SWs must also update the Field Worksheet before transferring a case. It is important that when birth certificates are received, the names of clients are corrected in CWS/CMS if necessary. When interviewing parents, if new name information is gained this information must be entered into CWS/CMS. The Field Worksheet may be accessed through Print Report - County Specific Report type in CWS/CMS.

Required Information

The minimum information required on all CWS cases is listed below.

On child(ren) being referred for services:

- Name (first, middle & last)
- Age and date of birth
- Gender
- Ethnicity
- If the child identifies with an Indian tribe/organization [see Indian Child Welfare Act (ICWA)]
- Language
- All applicable CC numbers (obtain from any petitions)
- Last name of mother of child(ren) being referred for services
- Other names (AKAs) used by the mother
- All relationships that client notebooks have been created for, except for those relationships of short duration; e.g., numerous partners of parents
- All medical coverage available to the child(ren) including Medi-Cal
- State ID, including AID code history if known.

**Required
Information (cont.)**

On Parent(s):

- Names of all parents of all children (including maiden name of mother)
- Marital history of all parents. (The date/place of marriage/divorce is essential in facilitating parent searches.) If never married, so state.
- Current address
- Social Security Number
- Date of birth
- Ethnicity
- If the parent identifies with an Indian tribe/organization, note this on ID page of Client Notebook
- All relationships that client notebooks have been created for, except for those relationships of short duration; e.g., numerous boyfriends of mother
- Birth place (city and state)
- Religion if known
- Telephone number (work/home/cell)
- Place of employment and occupation (If not employed, indicate "Not employed" and list the last place of employment and occupation)
- Other income such as CalWORKs, SSI, SSA, disability, etc.
- Driver's license number (list state)
- Military Status if applicable (on the Demographic tab in the Client Notebook. Additional information, if known, can be put in the comment box e.g., branch of military).

**Information Needed
On All Children/
Siblings**

The following information is needed regarding all children/siblings in the family, including siblings (adult or child; living or deceased) not in the home. If a child is deceased, document it on the Field Worksheet For Updating Client Demographics by placing parentheses around the name and include the date and cause of death if known. Also document the death in CWS/CMS:

- Birthplace (city and state)
- Social Security Cards and Numbers for Children/Youth (to receive AFDC-FC or Medi-Cal, a child must have a Social Security number)
- Address (for Confidential Placements, enter Info on the ID page of the Placement Notebook ID)
- Name of school (Enter info on the Enrollment Info page of the Education Notebook.)
- Grade in school (Enter info on the Enrollment Info page of the Education Notebook.)

**Information Needed
for Relatives and
References**

The following information is needed for relatives and references:

- Name
- Relationship
- Address
- Telephone number (home/work/cell)

Examples of references include relatives, teachers, friends, neighbors, physicians, psychiatrists.
