

# FOR YOUR INFORMATION

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Issue 18-26

Date: 07/05/18

## **DOCUMENTING CHILD AND FAMILY TEAM (CFT) MEETINGS IN THE CHILD WELFARE SERVICES/CASE MANAGEMENT SYSTEM (CWS/CMS)**

It's been aptly [said](#) that "one of the Continuum Care Reform's most fundamental principles is that child welfare services are most effective when delivered in the context of a child or youth and family-centered, child and family team (CFT) that shares responsibility to assess, plan, intervene, monitor and refine services over time". To support this principle, the [law](#) requires that county placing agencies convene CFT meetings to identify supports and services that support safety, permanency and the least restrictive family setting for a child. All certified workers should be holding CFT meetings. The priority for CFT meetings are newly detained children as well as children/youth transitioning from group homes/STRTPs. The Department's goal is for all children in care to have a CFT. Please refer to the [CFT policy](#) for more information regarding CFT and required meetings.

Per [All County Letter \(ACL\) 17-104](#), our Department is required to document all CFT meetings in CWS/CMS according to certain guidance and instructions. All CFT meetings must now be documented in CWS/CMS, under the Case Plan and Contact Notebooks. All types of [CFT meetings](#) (e.g. Wraparound, MCPC, etc.) should be documented as a CFT meeting as long as they are conducted with fidelity to the LA DCFS CPM CFT meeting model. Meetings may be co-facilitated by CSWs, DCFS colleagues or other professional staff at the meeting. Staff should decide before the CFT meeting who will facilitate and take notes on the flip charts.

CFT meetings must be on behalf of all the siblings and address the needs of all siblings in the family, whenever possible.

All CFT meetings that take place **on and after January 1, 2018**, including family engagement efforts to prepare the family for the meeting must be documented in CWS/CMS per the instructions provided below. CFT meetings held in Emergency Response, including family engagement efforts, must also be documented in the Contact Notebook of the referral, following the instructions provided below. The State will be reviewing our progress based on what is documented in CWS/CMS so it is very important that all CFTs conducted on or after 1/1/18 are documented in CWS/CMS. Each regional office is to develop a plan to address the backlog of CFT meetings that need to be entered in CWS/CMS. Regional Coach Developers have already received training on the CWS/CMS documentation requirements and are available to provide in-services within their offices. Additionally, an e-learning on documentation is being to provide staff with an additional reference/resource. DCFS is prioritizing the development of a report capturing CFT data from CWS/CMS to minimize the need for duplicate data entry. There will be a period of transition during which staff must enter the CFT data in CWS/CMS and in the CFT Database to ensure that we have the ability to track our progress without gaps.

Please note that the CFT plan intervention in the Health Notebook must not be used to document CFT meetings. The CFT plan intervention should be used only in connection with another mental health or developmental health service that a child/youth is receiving. For example, when entering information about a Specialty Mental Health Service that is delivered to a child or youth who receives Intensive Care



If you have any questions regarding this release please e-mail your question to:

[Policy@dcfs.lacounty.gov](mailto:Policy@dcfs.lacounty.gov)

Coordination (ICC) and who also has a CFT, both ICC and CFT would be selected as plan interventions in the Health Notebook. However, staff must still follow the instructions to document CFT meetings in the Case Plan and Contact Notebooks as these are the areas used by the State and DCFS to track CFT data.

Impacted Procedural Guides will be revised in the future to incorporate the above instructions.



If you have any questions regarding this release please e-mail your question to:

[Policy@dcfs.lacounty.gov](mailto:Policy@dcfs.lacounty.gov)

## Case Plan Notebook, Case Management Services

### Context: Prior to Child and Family Team (CFT) Meeting

According to [California Welfare & Institutions Code \(WIC\) Section 16501.1\(a\)\(1\)](#), the foundation and central unifying tool in child welfare is the case plan; and [WIC 16501.1\(b\)\(1\)](#) says, in part, that the case plan shall be based upon input from the child and family team.

County child welfare and probation agencies are expected to document CFTs in the Case Plan Notebook. Since parents will sign and receive a copy of the case plan, documenting the agency's plan to convene a CFT in the Case Plan Notebook is – in part – intended to help parents understand the agency's responsibility to provide services and the family's responsibility to participate in those services.

County social workers and probation officers should meet individually with children, youth, nonminor dependents, and families prior to the meeting to help them understand the CFT process and prepare them to participate in the CFT meeting. CFTs are more likely to be effective when children, youth, nonminor dependents, and families understand the process and their role in it.

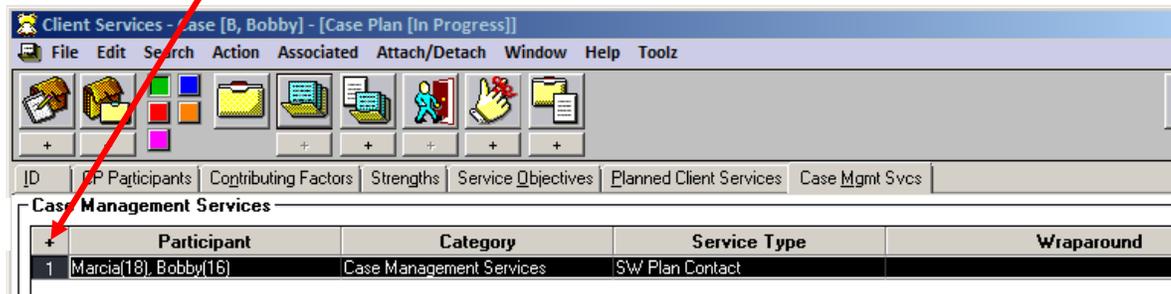
## Case Plan Notebook, Case Management Services

### Instruction: Add CFT as a Case Management Service

When documented in the Case Management Services tab, CFTs appear on the final Case Plan in the “Agency Responsibilities” section. This documents the agency's responsibility to provide a CFT.

In the Case Plan Notebook, on the Case Management Services tab, Child and Family Team has been added as a new Case Management Services Category.

- 1) Click “+” to bring up the dialog box.



1.

- a) Under the Category drop down menu, select Case Management Services.
- b) Under the Type drop down menu, select Child and Family Team.
- c) Select the participants from the participants list.
- d) In the “Provider” frame, select “Staff Person.”

## CFT Data Entry Instructions for CWS/CMS

e) Click “OK.”

**Select Case Management Services**

If participants have different descriptions or schedules, please select them separately.

Participants: B. Marcia (18), B. Bobby (17), N. Alice (60), B. Mike (40), B. Carol (39)

Category: Case Management Services

Type: Adoption, Arrange and Maintain Placement, Arrange ADA (Amer Disabilities Act) Svcs, Arrange Bilingual Services, Arrange Emergency Shelter Care, Arrange Legal Consultation, Arrange Service Delivery, Arrange Transportation, Arrange Visitation, Case Plan Development, **Child and Family Team**, Credit Results Reviewed with Youth, Discuss Credit Counseling/Participation, Foster Youth Rights and Svcs Delivered

Wraparound  Core Service

Provider:  Staff Person  Service Provider  Collateral  
 Substitute Care Provider

Provider Name: W. Chris

Buttons: OK, Apply, Cancel, Help

2) Complete the “Schedule for Service” frame.

a) Occurrences must be “1” or more.

b) Frequency must be a minimum of “Every 3 Months.”

**Client Services - Case [B. Bobby] - [Case Plan [In Progress]]**

Planned Client Services

| Participant  | Category                 | Service Type          | Wraparound | Core Service |
|--|--------------------------|-----------------------|------------|--------------|
| 1. Marcia(18), Bobby(17), Alice(60), Mike(40), Carol(39) | Case Management Services | Child and Family Team |            |              |

**Schedule for Service**

Start Date: 05/15/2017, End Date: 11/13/2017

Occurrences: 1

Frequency: **Every 3 Months**

Provider:  Staff Person  Service Provider  Collateral  
 Substitute Care Provider

Provider Name: W. Chris

*Note: CFT meetings may occur more frequently. For example, if the needs of the child, youth, or nonminor dependent and family are such that CFT meetings are planned to occur on a monthly basis, then “monthly” should be selected on the “Frequency” drop down menu.*

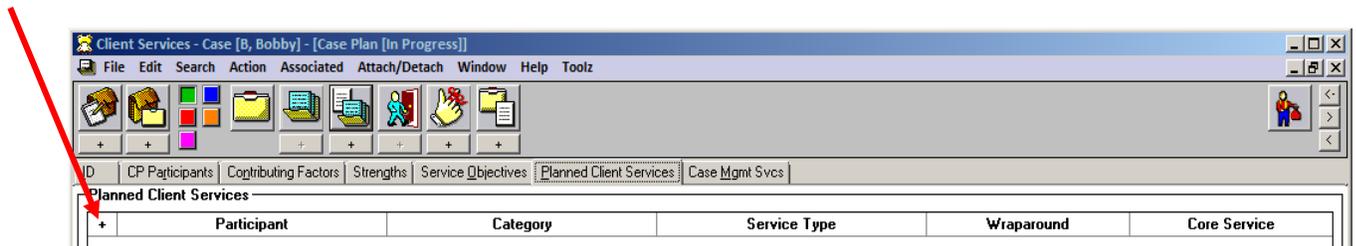
## CFT Data Entry Instructions for CWS/CMS

### Case Plan Notebook, Planned Client Services Add Child and Family Team as a Planned Client Service

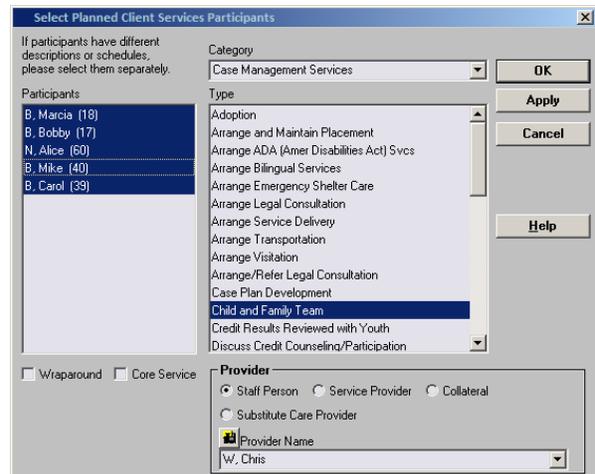
When documented in the Planned Client Services tab, CFTs appear on the final Case Plan in the “Client Responsibilities” section. This documents the family’s responsibility to participate in the CFT process.

On the Planned Client Services tab, Case Management Services has been added to the Category dropdown menu in the Select Planned Client Services Participants dialog box.

3) Click the “+” to bring up the dialog box. The new service type of “Child and Family Team” is available after the Case Management Services category has been selected:



- Under the Category drop down menu, select Case Management Services.
- Under the Type drop down menu, select Child and Family Team.
- Select the participants from the participants list.
- In the “Provider” frame, select “Staff Person.”
- Click “OK.”



## CFT Data Entry Instructions for CWS/CMS

- 4) Complete the “Schedule for Service” frame.
  - a) Occurrences must be “1” or more.
  - b) Frequency must be a minimum of “Every 3 Months.”

The screenshot shows the 'Planned Client Services' window. The 'Schedule for Service' section is highlighted, showing the following fields:

- Start Date: 06/15/2017
- End Date: 11/13/2017
- Occurrences: 1
- Frequency: Every 3 Months

A red arrow points to the 'Frequency' dropdown menu, which is currently set to 'Every 3 Months'. Below the 'Schedule for Service' section, there are radio buttons for 'Staff Person', 'Service Provider', and 'Collateral', and a 'Provider Name' dropdown menu.

# CFT Data Entry Instructions for CWS/CMS

## Contact Notebook

### Context: Individual CFT Meetings

Individual CFT meetings are in-person meetings, and at minimum include the identified child, youth, or nonminor dependent, family members, others identified by the family, the child's current caregiver, and the assigned child welfare social worker and/or probation officer. If the child, youth, or nonminor dependent also receives services from a community-based provider or other system, they should also be included in the CFT process.

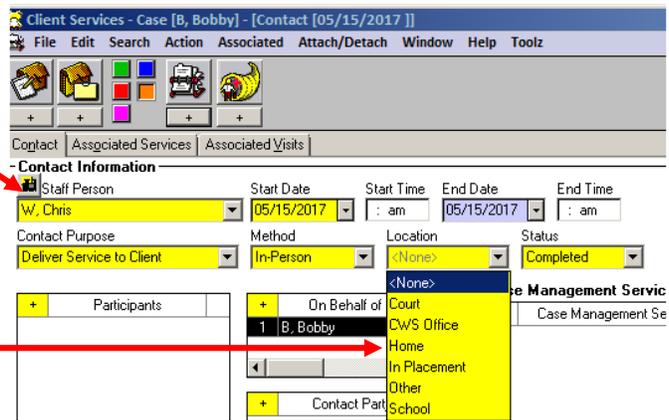
### Documentation of Individual CFT Meeting

Individual CFT meetings must be documented in the Contact Notebook with an Associated Service. The meeting should address the needs of all the siblings whenever possible and the contact/meeting is on behalf of all siblings in the family.

If the meeting is held in Emergency Response, enter the information in the Contact Notebook of the referral and follow the same instructions below.

1. Create a new or update an existing contact with the following information:

- a. Staff Person
- b. Start Date, Time of CFT meeting
- c. End Date, Time of CFT meeting

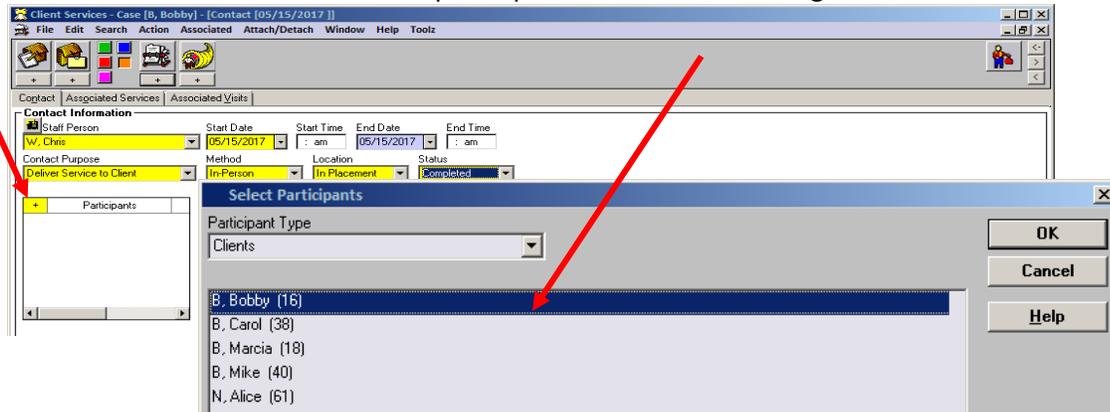


2. The fields below should be completed as shown:

- a. Contact Purpose: Deliver Service to Client
- b. Method: In Person
- c. Location: In Placement or Home (ideal)
  - i. CFT meetings should take place in a convenient setting that maximizes family member participation.
- d. Status: Completed (required)
  - i. Status must be recorded as "Completed"

3. Open "Select Participants" dialog box by clicking "+."

- a. Select all of the individuals who participated in the CFT meeting and click "OK."



## CFT Data Entry Instructions for CWS/CMS

4. Complete the Case Management Service/Referrals Frame
  - a. Click on “+” to open the case management services list.

The screenshot shows the 'Client Services - Case [B, Bobby] - [Contact [05/15/2017 ]]' window. The 'Case Management Services/Referrals' section is expanded, showing a list of services. A red arrow points to the '+' button in the 'Case Management Services/Referrals' section.

| Participants | Ag |
|--------------|----|
| 1 A, Joy     |    |
| 2 B, Bobby   | 17 |
| 3 B, Carol   | 39 |
| 4 B, Marcia  | 18 |
| 5 B, Mike    | 40 |
| 6 N, Alice   | 60 |
| 7 R, Barbara |    |

| On Behalf of Child | Age |
|--------------------|-----|
| 1 B, Bobby         | 17  |

| Contact Party Type        |
|---------------------------|
| 1 Staff Person/Child      |
| 2 Staff Person/Collateral |

| Case Management Services/Referrals   | Wraparound | Core Service |
|--------------------------------------|------------|--------------|
| + Case Management Services/Referrals |            |              |

- b. Select “CM-Child and Family Team” and click “OK.”

The screenshot shows the 'Client Services - Case [B, Bobby] - [Contact [05/15/2017 ]]' window with the 'Select Case Management Services/Referrals' dialog box open. The 'CM-Child and Family Team' option is selected in the list. The dialog box also includes checkboxes for 'Wraparound' and 'Core Service'.

| Case Management Services/Referrals          |
|---|
| CM-Adoption                                 |
| CM-Arrange ADA (Amer Disabilities Act) Svcs |
| CM-Arrange and Maintain Placement           |
| CM-Arrange Bilingual Services               |
| CM-Arrange Emergency Shelter Care           |
| CM-Arrange Legal Consultation               |
| CM-Arrange Service Delivery                 |
| CM-Arrange Transportation                   |
| CM-Arrange Visitation                       |
| CM-Arrange/Refer Legal Consultation         |
| CM-Case Plan Development                    |
| <b>CM-Child and Family Team</b>             |

Wraparound  Core Service

Buttons: OK, Apply, Cancel, Help

## CFT Data Entry Instructions for CWS/CMS

5. Contact appears as shown:

| Participants   | On Behalf of Child | Case Management Services/Referrals |
|----------------|--------------------|------------------------------------|
| 1 B. Bobby 16  | 1 B. Bobby 12      | 1 CM Child and Family Team         |
| 2 B. Carol 38  |                    |                                    |
| 3 B. Marcia 18 |                    |                                    |
| 4 B. Mike 40   |                    |                                    |
| 5 N. Alice 61  |                    |                                    |

### Contact Notebook

#### Context: Individual CFT Meetings as an Associated Service

Documentation of an individual CFT meeting is incomplete until an Associated Service has been attached to it. This documents the county agency responsible for convening the CFT meeting, and also records the Key Roles associated with those who attended.

### Contact Notebook

#### Add Individual CFT Meeting as an Associated Service

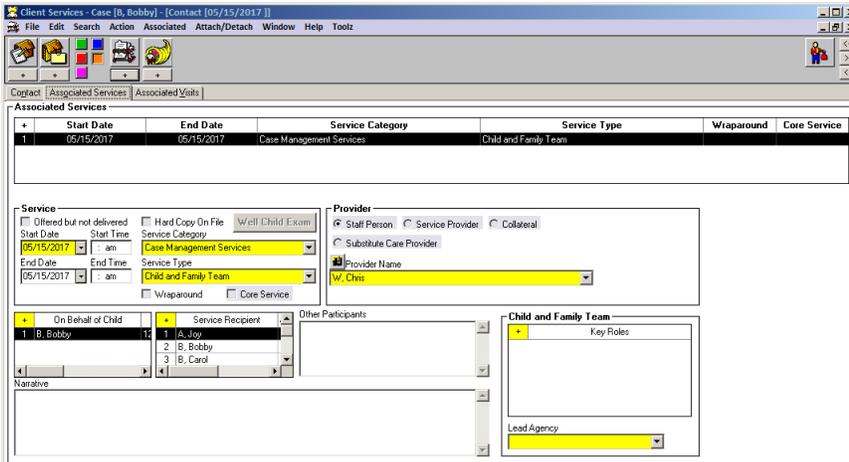
Individual CFT meetings must be added to a Contact as an Associated Service to document the Lead Agency involved and the Key Roles attending and participating in each meeting.

6. Click on the “Associated Services” tab.

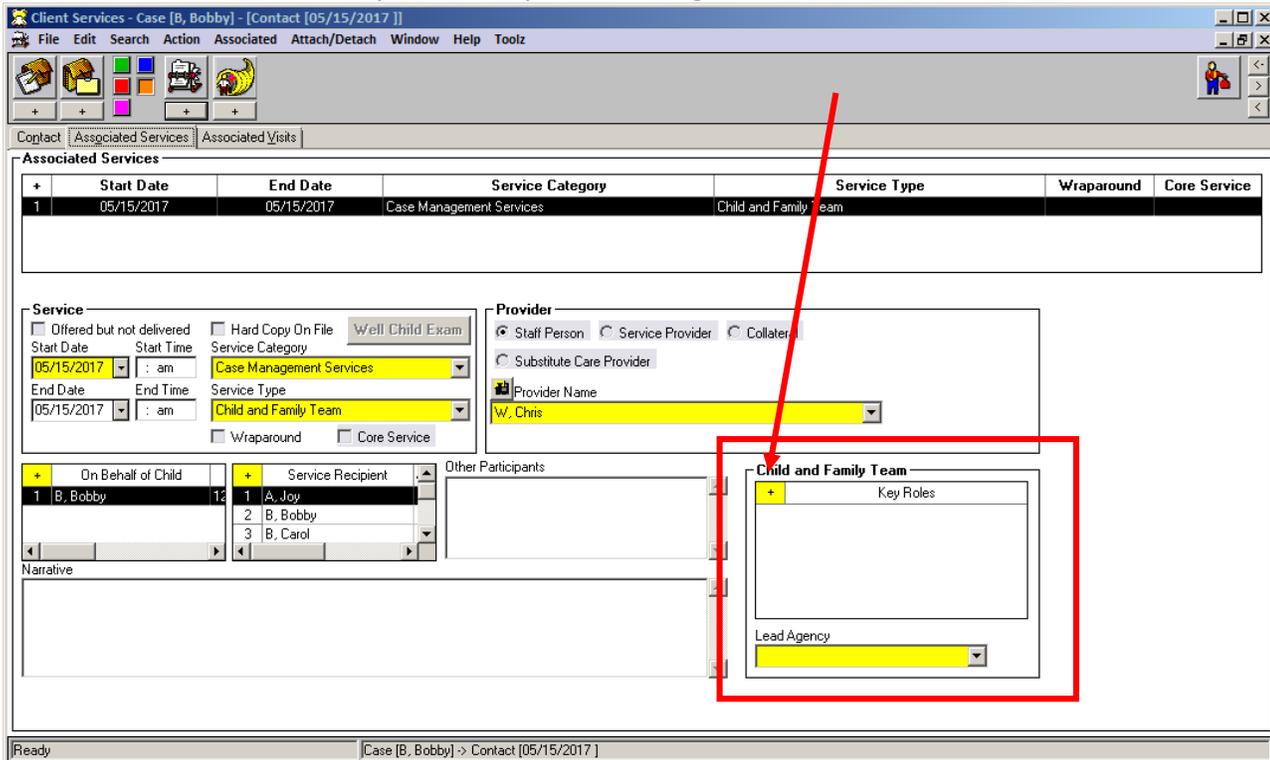
| Staff Person | Start Date | Start Time | End Date   | End Time |
|--------------|------------|------------|------------|----------|
| W, Chris     | 05/15/2017 | : am       | 05/15/2017 | : am     |

7. Most fields will be pre-populated

## CFT Data Entry Instructions for CWS/CMS



8. Complete the Child and Family Team frame, Key Roles and Lead Agency information.
  - a. Click on the “+” to open the “Key Roles” dialog box.



9. From list of available roles, select all of the Key Roles in attendance at the individual CFT meeting being documented.

- a. Multiple roles may be selected, however, each role can be selected only once for each documented CFT meeting. Therefore, a single contact on behalf of multiple siblings who received the CFT may be used in the Contact Notebook but will need to add Associated Services tabs – one for each sibling
- b. Key Roles are not assigned to particular individuals involved in the case. Each Key Role selected is recorded as attending the specific CFT meeting being documented.
- c. Select **Key Roles** according to the definitions shown in the following table.

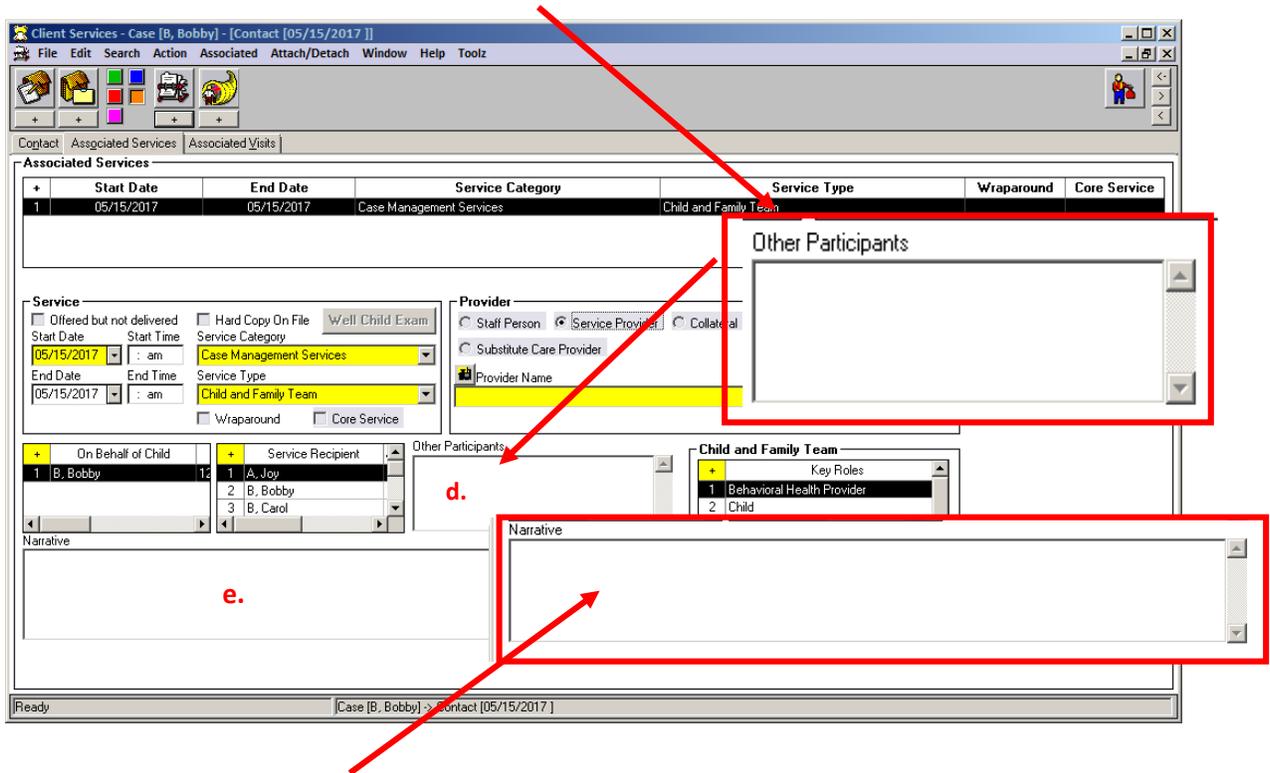
## CFT Data Entry Instructions for CWS/CMS

| Key Role  | Description   |
|---|---|
| a) <b>Behavioral Health Provider</b><br><i>Please always select this role for a representative of the county Mental Health Plan</i> | Supports the child, youth, nonminor dependent, and family by bringing a trauma-informed, clinical perspective to the team about the mental health status of the child, youth, or nonminor dependent.  |
| b) <b>Child</b>   | The identified child, youth, or nonminor dependent.   |
| c) <b>Child Welfare Social Worker</b>   | The assigned child welfare social worker of the identified child, youth, or nonminor dependent.   |
| d) <b>Clergy</b>  | Any recognized representatives of a church or other faith organization.   |
| e) <b>Court Appointed Special Advocate</b>  | An individual who advocates independently on behalf of a child, youth, or nonminor dependent, and is appointed by the court to ensure they live in an environment free from abuse and neglect.  |
| f) <b>Education Partner</b>   | Any representative of the identified child's school or academic achievement efforts.  |
| g) <b>Education Rights Holder</b>   | Person responsible for making education decisions in the child's best interests. The Education Rights Holder may be the child's parent, caregiver, legal guardian, or someone else appointed by the court. The Education Rights Holder cannot be the child's social worker, probation officer, attorney, STRTP/group home staff member, or school staff member. |
| h) <b>FFA Staff</b>   | An individual from the Foster Family Agency that supervises the identified child or youth's placement.  |
| i) <b>Natural Support</b>   | People or organizations identified by the child, youth, nonminor dependent, or family as important. Natural supports are a family's relationships and connections within their community, enhancing safety and diminishing loneliness and isolation. Examples include friends, neighbors, etc.  |
| j) <b>Other Community Support</b>   | Individuals that an identified child, youth, nonminor dependent, or family may invite to be a team member, such as the youth's swim coach, girl scout leader, or softball teammate, for example.  |
| k) <b>Other Family</b>  | Family members not reflected in one of the other roles.   |
| l) <b>Parent Partner</b>  | Individuals with lived experience who provide support and advocacy to parents whose children have been removed, helping them understand and navigate the system and encouraging them through the process.   |
| m) <b>Parent/Father</b>   | Birth father of the identified child, youth, or nonminor dependent. Do not use this role for a parenting youth or parenting nonminor dependent.   |
| n) <b>Parent/Mother</b>   | Birth mother of the identified child, youth, or nonminor dependent. Do not use this role for a parenting youth or parenting nonminor dependent.   |
| o) <b>Probation Placement Officer</b>   | The assigned deputy probation placement officer.  |
| <del>p) <b>Regional Center Provider</b></del>   | <del>Representatives of a Regional Center provider of developmental health services.</del>  |
| q) <b>Resource Parent</b>   | Substitute care provider.   |
| r) <b>Short Term Residential Therapeutic Program Staff</b>  | Representative from the STRTP where the identified child or youth resides.  |

## CFT Data Entry Instructions for CWS/CMS

|                          |   |
|--------------------------|---|
| s) Therapist             | The therapist providing services, but may also be used to mean any other mental health provider serving a child, youth, nonminor dependent and family.  |
| t) Tribal Representative | Representative from the identified child's, youth's, nonminor dependent's, or family's Native American tribe.   |
| u) Youth Partner         | Individual who works directly with the identified child, youth, or nonminor dependent to help them understand and navigate the process, and encourage them to participate and work with the team. |

*d. Anyone whose role at the CFT meeting is not identified in the list above may be added to the "Other Participants" dialog box. Other Participants will not be tracked.*



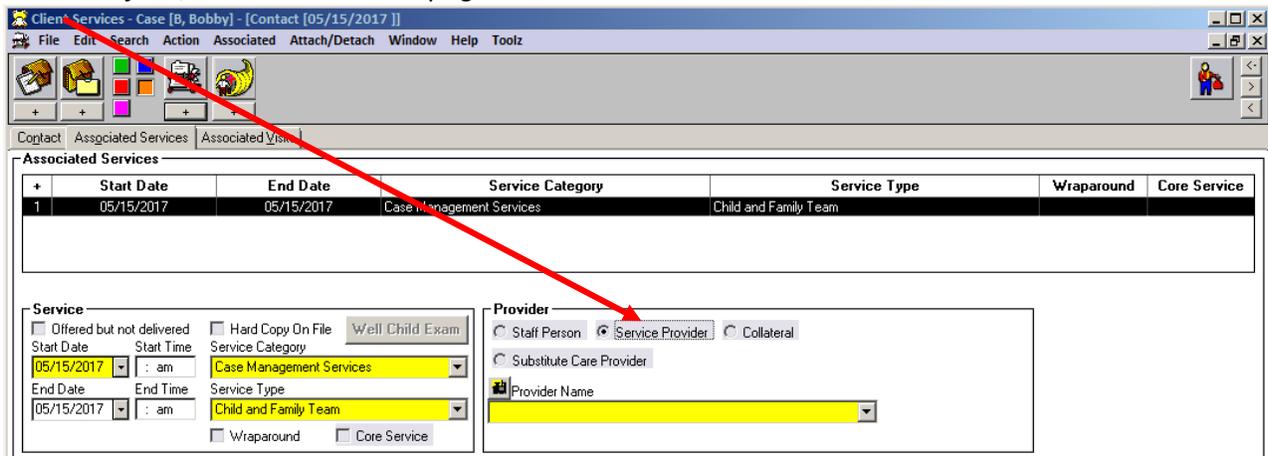
*e. A description of the content/topics of the CFT meeting, including family goals, tasks/action steps, non-negotiables and agreements, challenges/worries/needs, achievements/strengths, outcomes, etc., are added to the "Narrative" field. The narrative field can also be used to note if a service provider acted as a CFT Facilitator.*

**Please Note:**

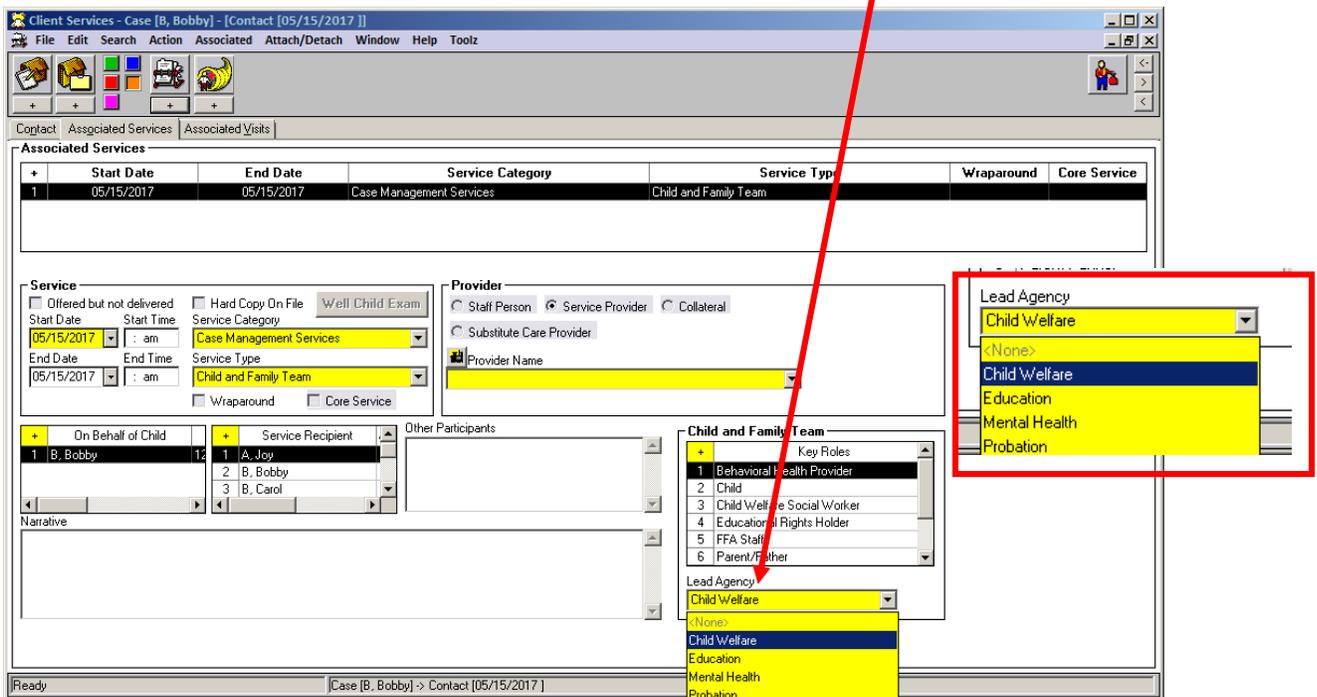
*While the functionality is not currently able to track a CFT Facilitator specifically, counties may use the Provider frame to document if a service provider participated in the CFT meeting.*

## CFT Data Entry Instructions for CWS/CMS

If the service provider acted as the CFT Facilitator, counties are encouraged to record that information in the Narrative field, as noted above on page 11.



10. Select the "Lead Agency" (county agency) responsible for convening the CFT on behalf of the child, youth, or nonminor dependent.
  - a. Select "Child Welfare" for foster care or dependency cases.
  - b. Select "Probation" for probation or delinquency cases.



**Please Note:**

When working in the Associated Services tab, if the Service Type is changed to a value other than "Child and Family Team," information entered in the "Key Roles" and "Lead Agency" fields will be cleared.

## CFT Data Entry Instructions for CWS/CMS

|   | Start Date | End Date   | Service Category         | Service Type          |
|---|------------|------------|--------------------------|-----------------------|
| 1 | 05/15/2017 | 05/15/2017 | Case Management Services | Child and Family Team |

**Service**

Offered but not delivered  Hard Copy On File  Well Child Exam

Start Date: 05/15/2017 Start Time: am Service Category: Case Management Services

End Date: 05/15/2017 End Time: am Service Type: Child and Family Team

Wraparound  Core Service

**Provider**

Staff Person  Service Provider  Collateral

Substitute Care Provider

Provider Name: [Dropdown]

**On Behalf of Child**

|   |          |
|---|----------|
| 1 | B, Bobby |
|---|----------|

**Service Recipient**

|   |          |
|---|----------|
| 1 | A, Joy   |
| 2 | B, Bobby |
| 3 | B, Carol |

**Other Participants**

|  |  |
|--|--|
|  |  |
|--|--|

**Child and Family Team**

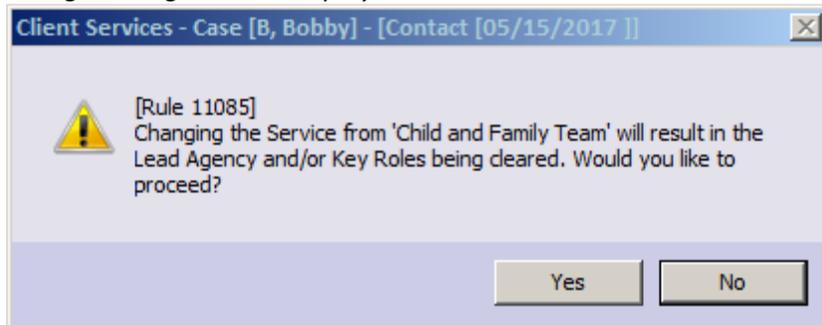
Key Roles

|   |                             |
|---|-----------------------------|
| 1 | Behavioral Health Provider  |
| 2 | Child                       |
| 3 | Child Welfare Social Worker |
| 4 | Educational Rights Holder   |
| 5 | FFA Staff                   |
| 6 | Parent/Father               |

Lead Agency: Child Welfare

Narrative: CFT meeting to discuss whether Bobby will attend summer school. |

A dialog box with the following message will be displayed:



End of CFT Documentation in the **Contact Notebook**

Documentation of CFTs will be reflected in the following reports and documents:

### Local Reports

#### 1. Case Plan, Individual Client Responsibilities

When documented in the Case Plan Notebook as described on pages four through six of this document, Child and Family Team planned services will appear on the Individual Client Responsibilities report in the Client Responsibilities section under Case Management Services.

### Documents

#### 1. Case Plan & Case Plan Update (Agency Responsibilities)

## CFT Data Entry Instructions for CWS/CMS

Documentation of CFTs as a Case Management Service in the Case Plan Notebook, as described on page four of this document, will be reflected as an agency responsibility in the Case Plan and Case Plan Update documents. The information will appear in the Agency Responsibilities section, under Case Management Services.

**2. Case Plan & Case Plan Update (Client Responsibilities)** Documentation of CFTs as a Planned Client Service in the Case Plan Notebook, as described on page six of this document, will be reflected as a client responsibility in the Case Plan and Case Plan Update documents. The information will appear in the Client Responsibilities section, under Case Management Services.

### 3. Delivered Service Log

A new checkbox has been added to the Delivered Service Select Filter when printing the Delivered Service Log. The checkbox is enabled when the “Services” box is checked.

07/05/2017 12:17 PM CDSS - Alpine SDSVSLLOG  
Logged-On Staff Person: Caroline Caton Page: 1 of 1

**DELIVERED SERVICE LOG**  
All Contacts, Services & Visits

FROM: 5/1/2017 TO: 7/5/2017  
FOR: chuckiee Modesto

**ContactDate:** 06/26/2017 **On Behalf Of:** chuckiee Modesto  
**ContactPurpose:** Deliver Service to Client **StaffPerson:** Caroline Caton  
**Participant(s):** Paula Ensele, chuckiee Modesto, Jonny Good, Doreen Proctor  
**Method:** In-Person **Location:** Home **Status:** Completed

**Service Date:** 06/26/2017 **On Behalf Of:** chuckiee Modesto  
**Service Category:** Case Management Services **ServiceType:** Child and Family Team  
**Service Recipient(s):** Paula Ensele, chuckiee Modesto, Jonny Good, Doreen Proctor  
**StaffPerson:** Caroline Caton **Wraparound:** **Status:** Completed  
**LeadAgency:** Child Welfare **KeyRoles:** Child, Child Welfare Social Worker, Natural Support, Other Family, Parent Partner, Parent/Father, Parent/Mother, Therapist, Tribal Representative

CFT meeting held to discuss visitation plans for upcoming July 4 holiday.

**Delivered Service Select Filter**

Date Range  
From: 05/01/2017 To: 07/05/2017  
Buttons: Apply, Cancel, Help

**Delivered Service Log**  
Do you want to print narrative?

Contacts  Yes  No  
 Visits  Yes  No  
 Services  Yes  No  
 CFT Lead Agency/Key Roles

The Delivered Service Log will reflect CFTs as a service, and include the CFT Lead Agency and Key Roles – plus any narrative – that were documented in the Contact Notebook for each documented CFT meeting.

## CFT Data Entry Instructions for CWS/CMS

### Documentation of Family Engagement prior to Individual CFT Meetings

#### Contact Notebook

Family Engagement Efforts prior to a CFT meeting must be documented in the Contact Notebook.

If the meeting is held in Emergency Response, enter the information in the Contact Notebook of the referral and follow the same instructions below.

1. Create a new or update an existing contact with the following information:

- a. Staff Person
- b. Start Date, Time of CFT meeting
- c. End Date, Time of CFT meeting

The screenshot shows the 'Client Services - Case [B, Bobby] - [Contact [05/15/2017 ]]' window. The 'Contact Information' section is visible, with the following fields filled: Staff Person: 'W, Chris'; Start Date: '05/15/2017'; Start Time: ': am'; End Date: '05/15/2017'; End Time: ': am'; Contact Purpose: 'Deliver Service to Client'; Method: 'In-Person'; Location: '<None>'; Status: 'Completed'. A dropdown menu for Location is open, showing options: '<None>', 'Court', 'CWS Office', 'Home', 'In Placement', 'Other', and 'School'. A red arrow points from the text 'with' to the 'w, Chris' field, and another red arrow points from the text 'with' to the 'In Placement' option in the dropdown menu.

2. The fields below should be completed as shown:

- a. Contact Purpose: Deliver Service to Client
- b. Method: In Person
- c. Location: In Placement or Home (*ideal*)
- d. Status: Completed (*required*)
  - i. Status must be recorded as "Completed"

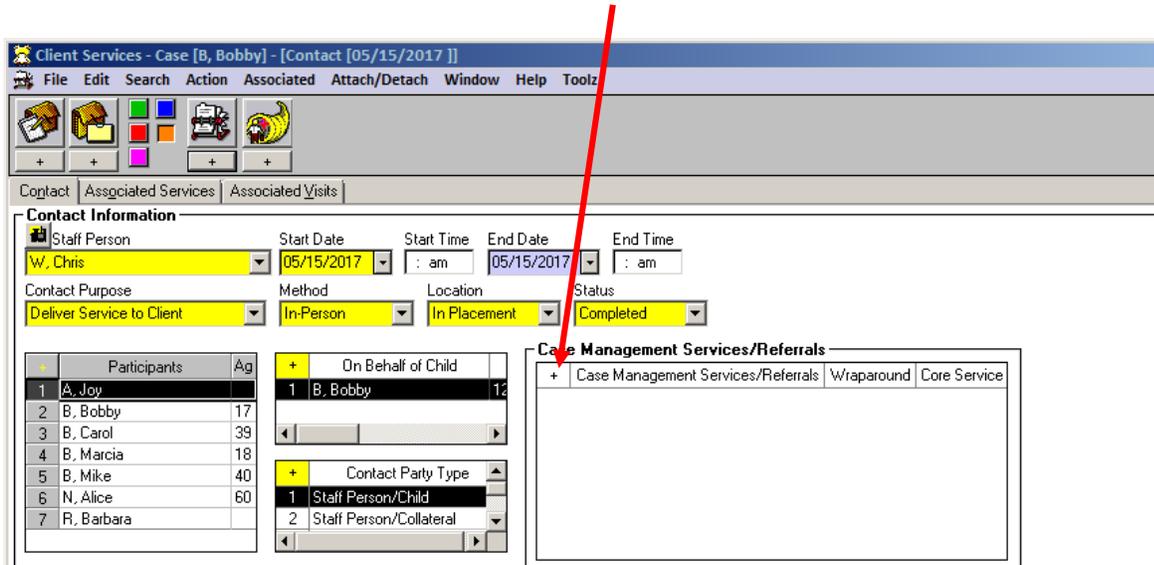
3. Open "Select Participants" dialog box by clicking "+."

a. Select all of the individuals who participated and click "OK."

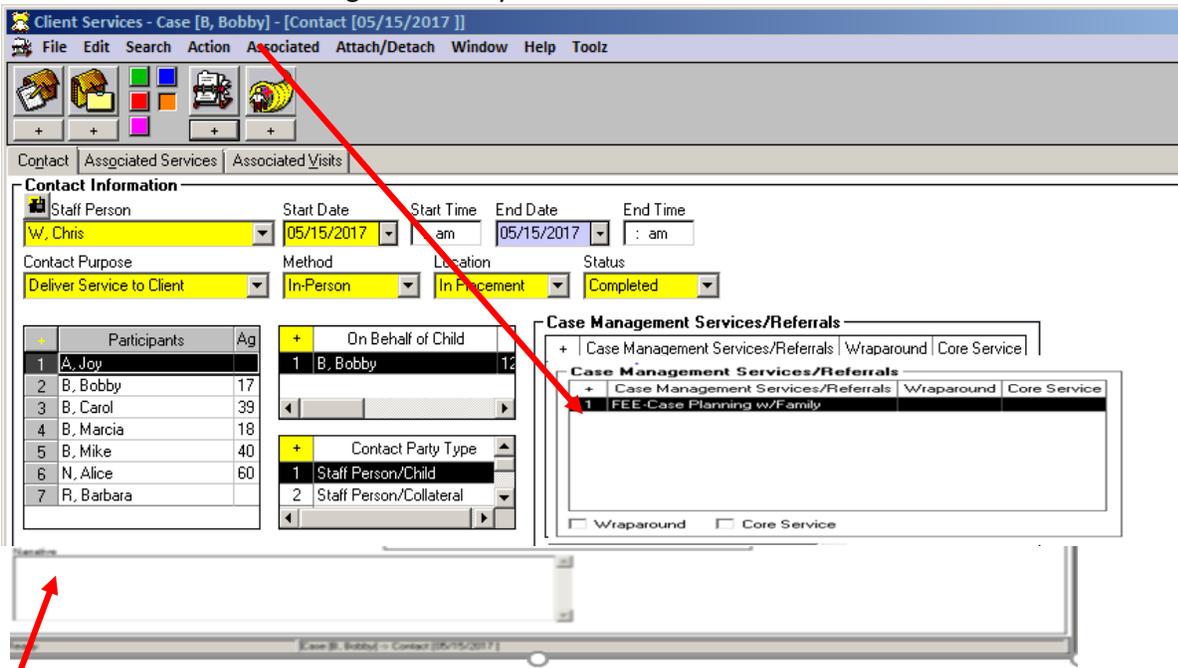
The screenshot shows the 'Client Services - Case [B, Bobby] - [Contact [05/15/2017 ]]' window with the 'Select Participants' dialog box open. The dialog box has a 'Participant Type' dropdown set to 'Clients'. A list of participants is shown: 'B. Bobby (16)', 'B. Carol (38)', 'B. Marcia (18)', 'B. Mike (40)', and 'N. Alice (61)'. The 'B. Bobby (16)' entry is selected. Red arrows point from the text 'with' to the '+' button in the 'Participants' list in the background window, and another red arrow points from the text 'with' to the 'B. Bobby (16)' entry in the dialog box.

## CFT Data Entry Instructions for CWS/CMS

4. Complete the Case Management Service/Referrals Frame
  - a. Click on “+” to open the case management services list.



- b. Select “FEE-“Case Planning with Family”.



Enter the family engagement efforts in the Narrative and click “OK.”

The Associated Services fields will be pre-populated.