

A. Documenting Relative Assessments in CWS/CMS

1. From the Client Management Section

2. Create a new Collateral

The screenshot shows the 'Client Information' form for Pedro Lozano. The 'Name and Identification' section includes fields for Prefix (Pedro), First (Lozano), Middle, Last, Suffix, and Name Type (Legal). Other fields include Gender (Male), Marital Status, SSN (567-71-5912), Alien Registration #, Date of Birth (06/07/1998), and Age (7 Years). The Client Number is 1065-4514-3204-0000018. The 'Confidentiality' section is checked, and the 'Safely Surrendered Baby' section is unchecked.

The 'New Notebook' dialog box is open, showing a table of clients for selection. The table has columns for Name, Age(Yrs), Gender, and Birth Date.

	Name	Age(Yrs)	Gender	Birth Date
1	Juarez, Felicia	50	Female	09/12/1954
2	Lozano, Joseph	29	Male	07/09/1976
3	Lozano, Pauline	1	Female	06/05/2003
4	Lozano, Pearl	28	Female	01/02/1977
5	Lozano, Pedro	7	Male	06/07/1998

3. Highlight the identified child and click OK

4. Complete the fields on the ID page

The screenshot shows the 'ID' page for Felicia Juarez. The 'Name' section includes Prefix, First (Felicia), M.I., Last (Juarez), and Suffix. The 'Gender' section has radio buttons for Male, Female (selected), and Unknown. The 'Birth Date' is 09/12/1954 and 'Marital Status' is Married. The 'Agency' and 'Phone Numbers' sections are also visible.

5. Complete the fields on the Address Page

The screenshot shows the 'Address' page for Felicia Juarez. The 'Address' section includes Street No. (326), Street Name (Elm St.), City (Sacramento), State (California), ZIP (95811), and ZIP Ext. There are also fields for Foreign Country, Foreign ZIP, and Foreign Address Description.

