



Texas Department of
Family and Protective Services

Case History Page –
Introduction to New Stages
Case History Page

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Case History Page – Introduction to New Stages

Overview

New stages are being added to the existing **Case History** page. These stages are:

- **Family Preservation (FPR)**
- **Family Substitute Care (FSU)**
- **Subcare (SUB)**
- **Family Reunification (FRE)**
- **Preparation for Adult Living (PAL)**

The **Case History** page displays both open and closed cases and stages. The case or stage field reflects the most recently opened stage. If the most recent stage is open, the page shows the case status as open.

Information on the **Case History** page displays chronologically. First, sorting on the case level by date. Second, within each case sorting by the stage level. Sorting will be from the oldest to the most recent open date on the case and stage level.

The **Case History** page displays with a row of basic case information. It will also display all stage related basic and detailed information. If there is no information for a specific field it will be blank. All information is prefilled from the system and is read only. For cases not labeled as "sensitive," an expando allows you to maximize or minimize the section to view additional information.

Case History Page – All Stages – How to Get There

1. From the **Assigned Workload** page in the **My Tasks** tab, select the **Stage Name** hyperlink.

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My Tasks | Case | Search | Reports | Resources

Workload

Assigned Workload

User Name: [redacted]
User ID: [redacted]

Show 12 entries

Case ID	Status	M-Rel	M-Inf	Stage Name	County	Stage	Type	Opened	Assigned	Region	Unit	Stage ID	Case ID	PGM
[redacted]	S	[redacted]	[redacted]	[redacted]	[redacted]	FSU	RFR	04/05/2018	10/03/2018	11	09	[redacted]	[redacted]	CPS
[redacted]	S	[redacted]	[redacted]	[redacted]	[redacted]	SUB	REO	05/30/2017	10/03/2018	11	09	[redacted]	[redacted]	CPB
[redacted]	S	[redacted]	[redacted]	[redacted]	[redacted]	FSU	LEG	05/30/2017	10/03/2018	11	09	[redacted]	[redacted]	CPS
[redacted]	S	[redacted]	[redacted]	[redacted]	[redacted]	SUB	RFR	06/12/2018	10/03/2018	11	09	[redacted]	[redacted]	CPS

2. The **Case Summary** page displays.
3. Select **Case History** from the secondary menu.

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My Tasks | Case | Search | Reports | Resources

Case Summary

Case Summary | Case Summary List | Case In-Do List | Print List | Print Search | Case History | Principal Case History | Family Tree | PCSP

Case Summary

Case Name: [redacted] * required field

Attention: You are currently in the SUB stage

Case Information

Case ID: [redacted] Region: 11
Status: Open Start Date of Case: 02/11/2007

Show 10 entries

Mrg	M-Rel	Stage Name	Sig	Type	Opened	Time	Closed	Primary	Reg	Stage ID	Ev/Dep	Phase
[redacted]	[redacted]	[redacted]	INT	SXABN	09/20/2018	02:06 PM	09/21/2018	[redacted]	09	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	INT	SXABN	09/20/2018	08:19 PM	09/27/2018	[redacted]	09	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	INT	SXABN	09/20/2018	01:12 PM	09/06/2018	[redacted]	11	[redacted]	[redacted]	[redacted]

Case History Page – Case Information Section

The **Case History** page displays with the case information sections for an open and closed case. The first row in the case section has the basic case information.

The following list fields on the **Case History** page are prefilled from the **Case Summary** page:

- **!**
- **WS**
- **Case ID**
- **MRG**
- **Program**
- **UTC**
- **Status**
- **Case Name**
- **County**
- **Primary**
- **Stage**
- **Type**

The screenshot shows the 'Case History' page. The top navigation bar includes 'My Tasks', 'Case', 'Search', 'Reports', and 'Resources'. The left sidebar has a 'Case Summary' menu. The main content area has a 'Case History' section with a table of cases. The table has the following columns: !, WS, Case ID, MRG, Program, UTC, Status, Case Name, County, Primary, Stage, and Type. The first row of the table is highlighted. The 'Case History' text is also highlighted with a red box.

!	WS	Case ID	MRG	Program	UTC	Status	Case Name	County	Primary	Stage	Type
▶		12345		CPS		OPEN	John Doe	Dallas	Primary	INT	PRN
▶		12345	✓	RCI		OPEN	John Doe	Dallas		INT	PRN
▶		12345		CPS		CLOSED	John Doe	Dallas		INT	PRN
▶		12345		APS		OPEN	John Doe	Dallas	Primary	INT	PRN
▶		12345		DCI		CLOSED	John Doe	Dallas		INT	PRN
▶		12345		CPS		OPEN	John Doe	Dallas	Primary	PAD	PRN
▶		12345	✓	CPS		CLOSED	John Doe	Dallas		INT	PRN
▶		12345		RCI		CLOSED	John Doe	Dallas		INT	PRN

Case History Page – Stage Information

The **Stage** section displays all the stages within the case. If the stage has an expando next to it, when selected it will display additional detailed information.

The following fields are prefilled under the **Stage** section as indicated below:

- **Stage, Stage ID, Stage Name, Open Date, and Closure Date** fields prefill from the **Case Summary** page for the referenced stage.
- **Reason Closed** field:
 - For **FPR, FSU, SUB, and FRE** stages – Prefills from the Reason field on the **Stage Closure** page found in the **Case Management** tab.
 - For **PAL** – Prefills from the **Closure Reason** listed under the **PAL Information** tab.
- **Close to Merge** prefills from the **Case Summary** page for the referenced stage.
- **Fatality** prefills from the **Person Detail** page for the referenced stage.
- **CSCAL** prefills from the **Case Summary** page for the referenced stage.



Note: The headings and fields are identical for the **FPR, FSU, SUB, FRE,** and **PAL** stage information therefore; it is only listed once in this document.

The screenshot shows the 'Case History' section of the system. The table below represents the data shown in the screenshot:

Stage	Stage ID	Stage Name	Open Date	Closure Date	Reason Closed	Close To Merge	Fatality	CSCAL
INT			10/11/2016	10/12/2018				
INT			09/17/2018	09/17/2018				

Case History Page – Sensitive Case

The **Case History** for a sensitive case will display only basic case information and will not have an expando view with additional information.

Locate the column header with the exclamation mark (!). If it has a red exclamation mark in the column, it indicates a sensitive case. The exclamation mark prefills from the **Special Handling** section of the **Case Summary** page.



Note: Only authorized users will be able to expand the header to view sensitive case history content and cases.

If there is an indicator in the **WS** field that denotes a work safety issue. When you hover over the icon it will display the information.

Case History

!	WS	Case ID	Mrg	Program	UTC	Status	Case Name	County	Primary	Stage	Type
				CPS		OPN				KIN	PRN
▶			✓	CPS		OPN				FRE	PRN
▶				CPS		OPN				SUB	PRN
						CLD				PAD	PRN
						OPN				PAL	PRN
	!		✓	CPS		CLD				FRE	PRN
▶				CPS		OPN				SUB	PRN

There is methamphetamine use, cocaine use, and domestic violence in the home. PP has a gun and history of felonies. MGO has an open CVS for adoption. CVS worker questioned INV about why the kids were not placed with GMO.

Case History Page – FPR Stage

From the **Case Summary** page locate the **Stage ID** expando. Select the expando and then select the **FPR** expando. This section displays an additional row of information specific to the **FPR** stage.

Select the expando to view the **PCSP** and **CPS Closing Summary** sections.

- The **PCSP** fields are prefilled as follows:
 - **Child, Start Date, End Date, Primary Caregiver** prefills from the **Parent Child Safety Placement List** page.
 - **Rel/Int** prefills from the **Person Detail** page for the **PCSP Caregiver**.
- In the **CPS Closing Summary** section, **Next Steps Conclusion** prefills from the most recent **Closing Summary** on the **Contact Detail** page under **Contacts/Summaries** tab.

The screenshot displays the 'Case History' section of a web application. At the top, there are navigation tabs: 'Case Summary', 'Case To-Do List', 'Event List', 'Event Search', 'Case History', 'Principal Case History', 'Family Info', and 'PCSP'. The 'Case History' tab is selected and highlighted with a red box. Below the navigation, there is a table of case stages. The table has columns: Case ID, Mkt, Program, UIC, Status, Case Name, County, Primary, Stage, and Type. One row is expanded to show 'PCSP Detail' information. This expanded view includes fields for 'Child', 'Start Date', 'End Date', 'Primary Caregiver', and 'Relationship to Child', all of which are highlighted with red boxes. The 'Child' field contains a name, 'Start Date' is 06/03/2016, 'End Date' is 09/13/2016, 'Primary Caregiver' is a name, and 'Relationship to Child' is 'Grandparent'. Other rows in the table show stages like INT, INV, and SUB with their respective dates and statuses.

Case History Page – FSU Stage

From the **Case History** page locate the **Case ID** expando. Select the expando and then select the **FSU** expando. This section displays an additional row of information specific to the **FSU** stage.

- All fields in the **Legal Status** section (**Effective Date**, **Legal County**, **Cause Number**, **Legal Status**, and **Discharge Reason**) prefill from the **Legal Status** page.
- All fields in the **Placement Information** section prefill from the **Placement Information** page:
 - **Placement Type**
 - **Facility**
 - **Living Arrangement**
 - **Start Date** and **End Date**
 - **Primary Kinship Caregiver** (prefills from the **Primary Kinship Caregiver** or **Person** fields)
- In the **CPS Closing Summary** section, the **Next Steps Conclusion** prefills from the most recent **Closing Summary** page.



Note: Open cases display the most recent placement. Closed cases display from the last placement.

The screenshot displays the Texas Department of Family and Protective Services Case History page for the FSU stage. The page is organized into several sections:

- Case History:** A dropdown menu showing the selected stage (FSU) and dates (10/18/2007 to 05/16/2008).
- Legal Status:** A table with columns for Effective Date, Legal County, Cause Number, Legal Status, and Discharge Reason. The table currently shows "No Records Found".
- Placement Information:** A table with columns for Placement Type, Facility, Primary Kinship Caregiver, Living Arrangement, Start Date, and End Date. The table currently shows "No Records Found".
- CPS Closing Summary:** A section titled "Next Steps/Conclusion" with a text area containing the date "05/08/2008" and the text "The worker arrived at the home of... were playing in the backyard with their mother when the worker arrived."

Case History Page – FRE

From the **Case History** page locate the **Case ID** expando. Select the expando and then select the **FRE** expando. This section displays an additional row of information specific to the **FRE** stage.

- All fields in the **Legal Status** section (**Effective Date**, **Legal County**, **Legal Status**, and **Discharge Reason**) prefill from the **Legal Status** page.
- All fields in the **Placement Information** section prefill from the **Placement Information** page:
 - **Placement Type**
 - **Facility**
 - **Living Arrangement**
 - **Start Date** and **End Date**
 - **Primary Kinship Caregiver** (prefills from the **Primary Kinship Caregiver** or **Person** fields)
- In the **CPS Closing Summary** section, the **Next Steps Conclusion** prefills from the most recent **Closing Summary** page.

The screenshot shows the Texas Department of Family and Protective Services (FPS) Case History page. The page is titled "Case History" and displays a list of cases. The "FRE" stage is selected, and the "Legal Status", "Placement Information", and "CPS Closing Summary" sections are visible. The "Legal Status" section shows a table with columns for Effective Date, Legal County, Cause Number, Legal Status, and Discharge Reason. The "Placement Information" section shows a table with columns for Placement Type, Facility, Primary Kinship Caregiver, Living Arrangement, Start Date, and End Date. The "CPS Closing Summary" section includes a "Next Steps/Conclusion" field with a text area containing a summary of the case closure.

Case History Page – SUB Stage

From the **Case History** page locate the **Case ID** expando. Select the expando and then select the **SUB** expando. This section displays an additional row of information specific to the **SUB** stage.

- All fields in the **Legal Status** section (**Effective Date**, **Legal County**, **Cause Number**, **Legal Status**, and **Discharge Reason**) prefill from the **Legal Status** page.
- All fields in the **Placement Information** section prefill from the **Placement Information** page:
 - **Placement Type**
 - **Facility**
 - **Living Arrangement**
 - **Start Date** and **End Date**
 - **Primary Kinship Caregiver** (prefills from the **Primary Kinship Caregiver** or **Person** fields)
- In the **CPS Closing Summary** section, the **Next Steps Conclusion** prefills from the most recent **Closing Summary** page.

The screenshot displays the Texas Department of Family and Protective Services Case History page. The page is titled "Case History" and shows a table of case history. The "SUB" stage is selected, and the details for that stage are expanded. The expanded view shows the following sections:

- Legal Status**: Effective Date (05/14/2008), Legal County, Cause Number, Legal Status, Discharge Reason (FPS Resp Terminated, Reunification with home of removal).
- Placement Information**: Placement Type (Non-Certified Person), Facility, Primary Kinship Caregiver, Living Arrangement (Return Home), Start Date (03/28/2008), End Date (05/16/2008).
- CPS Closing Summary**: Next Steps/Conclusion: Summarize why the case is being closed at this time, and include any recommendations. Include date of final court hearing and child's legal status. 05/08/2008 FTE writ by CPS worker.

Case History Page – PAL Stage

From the **Case History** page locate the **Case ID** expando. Select the expando and then select the **PAL** expando. The **PAL Summary** section displays with an additional row of information specific to the **PAL** stage. The fields **Closure Reason** and **Living Arrangement** are prefilled from the **PAL Information** page.

The screenshot shows the Texas Department of Family and Protective Services Case History page. The interface includes a sidebar with navigation options such as Case Summary, Person, Contacts/Summaries, Service Authorization, Legal, Child Plans, Placement, History, Medical, Foster Care Eligibility, PCA, ICPC, and Case Management. The main area displays a table of case stages. A specific PAL stage is expanded to show a summary with fields for Closure Reason and Living Arrangement.

WS	Case ID	Mrg	Program	UTC	Status	Case Name	County	Primary	Stage	Type
		✓	CPS		CLD				INV	PRN
			CPS		OPN				PAL	PRN

Stage	Stage ID	Stage Name	Open Date	Closure Date	Reason Closed	Close To Merge	Fatality	CSCAL
PAL			04/25/2015	08/27/2018				
PAL Summary								
Closure Reason					Living Arrangement			
No longer available					Independent Living			