Case History Page –
Introduction to New Stages
Case History Page

Contents

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.

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

4. The **Case History** page displays.

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**

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.*

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 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.

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.

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.

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.

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.