



Texas Department of  
**Family and Protective Services**

# Case Summary Tool Page – Overview

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# Case Summary Tool Page – Introduction

## Overview

A new page **Case Summary Tool** has been created to replace the legacy **Subcare Management Tool**. The location of the tool has been moved from the **Close Subcare Stage** tab on the **Case Maintenance** page (under the **Case Management** tab) in the legacy system to the new **Case Summary Tool** page found under the **Case Summary** tab.

The **Case Summary Tool** form will be launched in a new browser window, from the **Case Summary Tool** page, and will function the same as the legacy **Subcare Management Tool**, with the addition of new fields, and the ability to download the form in PDF format. This tool is only available in the **SUB** stage.

**Stages Impacted:** SUB

## Case Summary Tool Page – How to Get There



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

SS	WS	Hr	P/S	M-Ref	Stage Name	County	Stage	Type	Opened	Assigned	Region	Unit	Stage ID	Case ID	PGM
			P				FSU	RTA	01/15/2018	02/15/2018	03	F3			OPR
			P				FSU	REG	02/08/2018	02/20/2018	03	F3			OPR
			P				SUB	REG	02/08/2018	02/18/2018	03	F3			OPR
			P				SUB	REG	04/25/2018	05/21/2018	03	F3			OPR
			P				SUB	RTA	04/25/2018	05/21/2018	03	F3			OPR
			P				SUB	REG	04/25/2018	05/21/2018	03	F3			OPR
			P				SUB	REG	01/08/2018	02/27/2018	03	F3			OPR
			P				SUB	REG	05/21/2018	05/18/2018	03	F3			OPR
			P				FSU	RTA	05/21/2018	05/18/2018	03	F3			OPR
			P				SUB	REG	05/21/2018	05/18/2018	03	F3			OPR

- The **Case Summary** page displays.
- Select **Case Summary Tool** from the secondary menu.

**Case Summary**

Case ID: 08  
Status: Open  
Region: 08  
Start Date of Case: 01/12/2018

Msg	M Hcf	Stage Name	Stg	Type	Opened	Time	Closed	Primary	Reg	Stage ID	On/Off	Phone
<input type="radio"/>			PSJ	REG	02/08/2018				08			
<input checked="" type="radio"/>			SUB	REG	02/08/2018				08			
<input type="radio"/>			INV	RSUP1	01/12/2018	04:00 PM	03/02/2018		08		RTM	
<input type="radio"/>			INT	RSUP1	01/12/2018	01:22 PM	01/12/2018		08			

Showing 1 to 4 of 4 entries

Special Handling

- The **Case Summary Tool** page displays.

**Case Summary Tool**

	Name	Address	Email Address	Primary/Phone Number
<input type="checkbox"/>		Foster Parent		
<input type="checkbox"/>		Foster Parent		
<input type="checkbox"/>		Foster (Birth)		
<input type="checkbox"/>				
<input type="checkbox"/>		Other		

Include to Do List

Launch Download

# Case Summary Tool Page – Selecting Multiple Parents and Participants

1. The **Case Summary Tool** page displays with participants from the case listed.
2. Locate the following prefilled fields on the **Case Summary Tool** page:
  - **Stage Name** prefills from the referenced stage name.
  - **Case ID** prefills from the referenced case.
  - **Name, Rel/Int, Email Address, and Primary Phone Number** fields prefill from the **Person Detail** page.
3. Select the checkbox next to each participant you want to include on the **Case Summary Tool** form.
4. Select the checkbox for each parent to include on the **Case Summary Tool** form.



**Note:** The checkbox will be auto-selected for the primary child on the **SUB** stage. The checkbox will be disabled for that child.

The screenshot displays the Systest Case Summary Tool interface. The top navigation bar includes 'My Tasks', 'Case', 'Search', 'Reports', and 'Resources'. The left sidebar lists various case management categories. The main content area is titled 'Case Summary Tool' and features a table of participants. The table columns are 'Name', 'Rel/Int', 'Email Address', and 'Primary Phone Number'. There are checkboxes in the first column of the table. A red box highlights the 'Case Summary Tool' title, and another red box highlights the 'Stage Name' and 'Case ID' fields. The table rows show participants with roles like Foster Parent, Parent (Birth), Self, and Other. At the bottom right, there are 'Launch' and 'Download' buttons.

# Case Summary Tool Page – Include To-Do List Checkbox

1. When you select the **Include To-Do List** checkbox, the **Case To-Do List** will display on the **Case Summary Tool** form.
2. From the **Case Summary Tool** page, select the **Include To-Do-List** checkbox.
3. When the form is launched, the **Case To-Do list** section displays on the **Case Summary Tool** form.

The screenshot shows the 'Case Summary Tool' page in a web application. The page has a navigation bar at the top with 'My Tasks', 'Case', 'Search', 'Reports', and 'Resources'. Below this is a sidebar with various case management options. The main content area is titled 'Case Summary Tool' and contains a table of case details. A red box highlights the 'Include To-Do-List' checkbox, which is checked. The table below it lists case details with columns for Name, Rel/Int, Email Address, and Primary Phone Number.

	Name	Rel/Int	Email Address	Primary Phone Number
<input checked="" type="checkbox"/>	[Redacted]	Foster Parent	[Redacted]	[Redacted]
<input checked="" type="checkbox"/>	[Redacted]	Foster Parent	[Redacted]	[Redacted]
<input checked="" type="checkbox"/>	[Redacted]	Parent (Birth)	[Redacted]	[Redacted]
<input checked="" type="checkbox"/>	[Redacted]	Self	[Redacted]	[Redacted]
<input checked="" type="checkbox"/>	[Redacted]	Other	[Redacted]	[Redacted]

# Case Summary Tool Page – Launching the Form

1. To launch the **Case Summary Tool** form, follow these steps:
2. From the **Case Summary Tool** page, select the checkbox next to each participant you want to include on the **Case Summary Tool** form.
3. Select the **Launch** button.

The screenshot displays the 'Case Summary Tool' interface. At the top, there is a navigation bar with 'Case' selected. Below it, a secondary navigation bar contains tabs for 'Case Summary', 'Case Summary Tool', 'Case To-Do List', 'Event List', 'Event Search', 'Case History', 'Principal Case History', 'Family Tree', and 'PCSP'. The 'Case Summary Tool' tab is active and highlighted with a red box. On the left side, there is a vertical menu with various case-related categories. The main content area shows a 'Stage Name' and 'Case ID' field. Below these is a table with the following columns: 'Name', 'Rel/Int', 'Email Address', and 'Primary Phone Number'. The table contains five rows, each with a checked checkbox in the first column. Below the table, there is a checkbox labeled 'Include To-Do-List' which is also checked. At the bottom right of the table area, there are two buttons: 'Launch' and 'Download'. The 'Launch' button is highlighted with a red box.

Name	Rel/Int	Email Address	Primary Phone Number
<input checked="" type="checkbox"/>	Foster Parent		
<input checked="" type="checkbox"/>	Foster Parent		
<input checked="" type="checkbox"/>	Parent (Birth)		
<input checked="" type="checkbox"/>	Self		
<input checked="" type="checkbox"/>	Other		

4. The **Case Summary Tool** form displays in a separate window.

Case Summary Tool		Case Events		To-Do List	
Case #: _____ Case Name: _____		Current Approved CPOS: 01/14/2019 Next CPOS Due Date: 04/30/2019		Type Description	
<b>Child</b>		Primary Permanency Plan: All Family, Relative/Fictive Kin, Adoption Concurrent Permanency Plan: Family Reunification		Task Apply for Foster Care Assistance Eligibility	
<b>Identification Information</b>		Last PFT: 04/24/2018 Last Visit at Placement: _____		Task The Child's Service Plan Review for _____ is due by 09/30/2018	
Name: _____ D.O.B: _____		Last CVS Monthly Required (PFT) Date: _____ Consent to Monthly Evaluation Date: _____		Task JAM - Foster Care Review	
SSN: _____ Medicaid No: _____		Last Annual Medical Exam: 01/09/2018 Last Dental 6 Mo. Exam/CI: 11/13/2018		Task Apply for Foster Care Assistance Eligibility	
PID: _____		Last Psychological Eval: _____		Alert _____ has a Annual Medical Exam Appointment due on 02/06/2019	
<b>Legal Information</b>		Current Approved FPPOS: 01/29/2018 Next FPPOS Due Date: _____		Task _____ has a Scheduled Dental 6 Mo. Exam/CI Appointment on 01/11/2018	
Reason for Removal: Neglectful Supervision/Risk Conservatorship Date: 02/25/2019		Last CANS Assessment: _____ Last Approved FSNA: _____		Task The Child's Service Plan Review for _____ is due by 04/30/2018	
<b>Legal Information</b>		<b>Parents</b>		Alert New approval determination logged for ICPC Placement Request. Outstanding requests exist.	
Case #: _____ Court Number: _____		<b>Mother(s)</b>		Alert Rejection determination logged for ICPC Placement Request. Other approval requests invalidated.	
Legal County: _____ Court Term: MO, FA: _____		Rel/Int Parent		Task Apply for Foster Care Assistance Eligibility	
Legal Status: P/MC/ Rts Not Term Other: _____		Name: _____		Task JAM - Foster Care Review	
Last Review Hearing: 12/17/2018 Next Review Hearing: 12/17/2018		Person ID: _____		Task JAM - Foster Care Review	
<b>Placement</b>		Primary Phone: Residence-cell: _____		Alert Rejection determination logged for ICPC Placement Request. Other approval requests invalidated.	
Placement Name		Email Address: _____		Alert New approval determination logged for ICPC Placement Request. Outstanding requests exist.	
Agency: _____ Resource ID: _____		Last CVS Monthly Required (PTF) Date: _____		Task JAM - Foster Care Application	
Facility: _____ Resource ID: _____		Residence Mail Address: _____		Task JAM - Foster Care Review	
Placement Type: Kinship only (non-licensed) Date Placed: 12/21/2018		<b>Father(s)</b>		Alert Rejection determination logged for ICPC Placement Request. Other approval requests invalidated.	
Living Arrangement: Relative's Home Date Placed: 12/21/2018		Rel/Int Absent Parent		Task 100A Submitted request not Approved, you must resubmit.	
Address/Phone		Name: _____		Alert New approval determination logged for ICPC Placement Request. Outstanding requests exist.	
Address: _____ Phone: _____		Person ID: _____		Task 100A Submitted request not Approved, you must resubmit.	
Additional Contact Information		Primary Phone: Residence-cell: _____		Alert Rejection determination logged for ICPC Placement Request. Other approval requests invalidated.	
Service Level		Email Address: _____		Task 100A Submitted request not Approved, you must resubmit.	
Authorized SL: _____ SL Effect Date: _____		Last CVS Monthly Required (TF) Date: _____		Alert Submitted 100A request has been modified.	
<b>Education</b>		Residence Mail Address: _____		Task Supervision Report available.	
School Name: _____ Grade: Special Ed. (Y/N)		<b>Others Involved</b>		Alert Rejection determination logged for ICPC Placement Request. Other approval requests invalidated.	
School District: _____ Education Portfolio		Name Rel/Int Primary Phone Email Address		Task 100A Submitted request not Approved, you must resubmit.	
Last ARD Date: _____ Enrolled Date: _____		Grandparent Maternal Residence _____		Alert Rejection determination logged for ICPC Placement Request. Other approval requests exist.	
School Programs (list each): _____ Specify Section 504 Accommodations, if data exists		Aunt/Uncle Residence-cell: _____		Task 100A Submitted request not Approved, you must resubmit.	
<b>Case Events</b>		Aunt/Uncle Residence-cell: _____		Alert New approval determination logged for ICPC Placement Request. Outstanding requests exist.	
		Absent Parent Residence-cell: _____		Alert New Primary Assignment	
		Grandparent Paternal Residence _____		Alert New approval determination logged for ICPC Placement Request. Outstanding requests exist.	
		Absent Parent Residence-cell: _____		Alert Rejection determination logged for ICPC Placement Request. Other approval requests invalidated.	
				Alert New approval determination logged for ICPC Placement Request. Outstanding requests exist.	
				Task 100A Submitted request not Approved, you must resubmit.	
				Alert New approval determination logged for ICPC Placement Request. Outstanding requests exist.	
				Alert New approval determination logged for ICPC Placement Request. Outstanding requests exist.	



# Case Summary Tool Page - Download and Save the Form

1. To download and save the **Case Summary Tool** form, follow these steps:
2. From the **Case Summary Tool** page, select the checkbox next to each participant you want to include on the **Case Summary Tool** form.
3. Select the **Download** button at the bottom of the page. The form will download in a PDF format. Once the form is open you can save it to your computer.



**Note:** When downloaded, the form can be printed.

Case Summary Tool

	Name	Rel/Int	Email Address	Primary Phone Number
<input checked="" type="checkbox"/>	[Redacted]	Foster Parent	[Redacted]	[Redacted]
<input checked="" type="checkbox"/>	[Redacted]	Foster Parent	[Redacted]	[Redacted]
<input checked="" type="checkbox"/>	[Redacted]	Parent (Birth)	[Redacted]	[Redacted]
<input type="checkbox"/>	[Redacted]	Self	[Redacted]	[Redacted]
<input checked="" type="checkbox"/>	[Redacted]	Other	[Redacted]	[Redacted]

Include To-Do-List

Launch Download



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# Case Summary Tool Page – Introduction to Form

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# Case Summary Tool Form - Introduction

## Overview

The **Case Summary Tool** form will be launched from the **Case Summary Tool** page. The form is arranged so that legal information will be displayed as a separate section and not as a part of the **Placement** section. New additions to the form include the **Case To-Do List** and **Legal** sections.

**Stages Impacted:** SUB

## Case Summary Tool Form - Form Layout

1. Viewing the new and modified headings, sections and fields on the **Case Summary Tool** form.
2. Launch the form from the **Case Summary Tool** page.
3. The form displays in a new window.
4. Examine the following headings, sections, and fields that are new or different from the **Subcare Management Tool** form in Legacy IMPACT:
  - Title of the form is **Case Summary Tool**.
  - "PID" in the **Child** section.
  - "Next Review Hearing" in the **Legal Information** section.
  - "Placement Type" and "Additional Contact Information" in the **Placement** section. "Additional Contact Information" is a text field and is editable on the form.
  - "School District," "Education Portfolio," "Last ARD Date," "Enrolled Date," "School Programs (list each)," and "Specify Section 504 Accommodations, if data exists" in the **Education** section.
  - All headings and fields in the **Case Events** section.
  - "Primary Phone," "Email Address," "Last CVS Monthly Required (FTF) Date," and "Residence Mail Address" in the **Parents** (Mother(s) and Father(s)) section.
  - All headings and fields in the **To-Do List**.



**Note:** All legal information now displays in the **Legal Information** section and not with the **Placement** information.

Case Summary Tool		Case Events		Name:									
<p>Case # _____ Case Name: _____</p> <p><b>Child</b></p> <p><b>Identification Information</b></p> <p>Name: _____ D.O.B.: _____ SSN: _____ Medicaid No: _____ DOB: _____</p> <p><b>Legal Information</b></p> <p><b>General Information</b></p> <p>Reason for Removal: Negligent Supervision/Abuse Conservatorship Date: 02/09/2018</p> <p><b>Legal Information</b></p> <p>Cause # _____ Court Number: _____ Legal County: _____ High Court: MD, PA, OH, WI Last Review Hearing: 07/16/2018 Next Review Hearing: 07/16/2018</p> <p><b>Placement</b></p> <p>Placement Name: _____ Resource ID: _____ Agency: _____ Resource ID: _____ Living Arrangement: _____ Date Placed: 12/17/2019</p> <p>Address/Phone: _____ Phone: _____</p> <p>Additional Contact Information: _____</p> <p>Service Level: _____ Subvented SL: Basic SL Effect Date: 02/09/2018</p> <p><b>Education</b></p> <p>School Name: _____ Grade: Special Ed. (VTE) School District: _____ Education Provider: _____ Last IEP Date: _____ Medicaid Case: _____ School Program (if not null): _____ Status of Student: LGR, Assisted Guardianship, Other, None</p>		<p><b>Parents</b></p> <p><b>Parent 1</b></p> <p>Current Agency: 124106-00000106 N: 124106-000-1106-00106 Primary Placement: Parent Family Reunification Circumvent Permanency Plan Last PFTT: _____ Last CVC Monthly Review (PTT) Date: _____ Last Annual Medical Exam: 04/08/2018 Current CVC Monthly Duplication Date: _____ Last Dental Exam: 08/14/2018 Last Psychologist Exam: _____ Current Agency: 99994-00000019 N: 99994-000-0019-00000019 Last IADMS Assessment: _____ Last Approval: 04/16/2018</p> <p><b>Parent 2</b></p> <p>Birth Date: Parent (DOB): _____ Name: _____ Parent ID: _____ Primary Address: _____ City: _____ Last CVC Monthly Review (PTT) Date: _____ Residence Mail Address: _____</p> <p><b>Parent 3</b></p> <p>Birth Date: Parent (DOB): _____ Name: _____ Parent ID: _____ Primary Address: _____ City: _____ Last CVC Monthly Review (PTT) Date: _____ Residence Mail Address: _____</p>		<p>Person ID: _____ Primary Phone: Residence-cell: _____ Email Address: _____ Last CVC Monthly Review (PTT) Date: _____ Residence Mail Address: _____</p> <p>Parent: Foster Parent Name: _____ Person ID: _____ Primary Phone: Residence: _____ Email Address: _____ Last CVC Monthly Review (PTT) Date: _____ Residence Mail Address: _____</p> <p><b>Others Involved</b></p> <table border="1"> <thead> <tr> <th>Name</th> <th>Relist</th> <th>Primary Phone</th> <th>Email Address</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> <p><b>To-Do List</b></p> <p>Type/Description</p> <p>Task CVC Orders Permanency Review Hearing Court Report for _____ is due to all parties on 10/09/2018</p> <p>Task CVC Orders Permanency Review Hearing Court Report for _____ is due to all parties on 10/09/2018</p> <p>Task CVC Orders Permanency Review Hearing Court Report for _____ is due to all parties on 07/09/2018</p> <p>Task CVC Orders Permanency Review Hearing Court Report for _____ is due to all parties on 07/09/2018</p> <p>Alert New Primary Assignment</p> <p>Task CVC Orders Status Hearing Court Report for _____ is due to all parties on 05/16/2018</p> <p>Task IFR - Approve Placement for _____</p> <p>Task IFR - Parent Placement PFTT</p> <p>Task IFR - Foster Care Application</p> <p>Alert Approval Complete - Service Authorization [ ]</p> <p>Task Family for Foster Care Assistance Request</p> <p>Task IFR - Approve Transition Plan - English for _____</p> <p>Alert PHSI Family Plan Review for _____ is due on 10/31/2018</p> <p>Alert PHSI Family Plan Review for _____ is due on 11/09/2018</p> <p>Task PHSI - 1719 Study Evaluation submitted for approval for _____</p> <p>Alert _____ has a Dental Exam Appointment due on 11/14/2018</p> <p>Alert _____ has a Annual Med call Appointment due on 05/25/2019</p> <p>Task The Child's Service Plan Review is due by 07/01/2018</p> <p>Task Foster Care Assistance Review is due by 01/06/2019 for _____</p> <p>Alert New Secondary Assignment</p> <p>Task The Child's Service Plan Review for _____ is due by 11/30/2018</p> <p>Alert New Primary Assignment</p> <p>Alert New Secondary Assignment</p> <p>Task Home Study Available</p>		Name	Relist	Primary Phone	Email Address				
Name	Relist	Primary Phone	Email Address										