

# Storyboard

## CPS – Linking an Investigation to a Family Case

This storyboard demonstrates how to link a CPS Investigation to a Family Case.

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# CPS Investigation Topics Screen

**Note:** The option to **Link Investigation to Case** will not display until all **Investigation Persons** have been established.

## Link Investigation to a Case

1. Navigate to the CPS **Investigation Topics** screen by navigating to **Home Workload** screen (select a CPS Case) > **Investigation Overview** screen> **Investigation Topics** tab.

The screenshot shows the 'Investigation Topics' screen with the following details:

- Investigation Header:** Investigation ID, Investigation Name, Investigation Status: Open, Organization: TN Valley Region, Priority: 2, Response Due Date/Time: 06/23/2015 11:59 PM (CT), Track: Assessment.
- Investigation Topics Table:**

Topic	Status
<a href="#">Linked Intakes</a>	Count of Linked Intakes=1
<a href="#">Investigation Persons</a>	Count of Persons/Participants=4/4
<a href="#">Case Recordings</a>	Count of Case Recordings=4
<a href="#">Allegations/Classifications</a>	Count of Allegations/Classified Allegations=2/0
<a href="#">Forms/Reports</a>	Count of Forms/Reports=0
<a href="#">Extension Requests</a>	Count of Extension Requests=0
<a href="#">Due Process</a>	Count of Due Processes=0
<a href="#">Documents</a>	Count of Documents Scanned=0
<a href="#">Checklists</a>	Count of Checklists=0
<a href="#">Track Change</a>	Track Not Changed
<a href="#">Link Investigation to Case</a>	Case ID:

Buttons: Close, Approval

2. Click **Link Investigation to Case**. The **Link Case** screen displays listing possibly one or more cases.

**Note:** These cases are options to link to because one or more of the Investigation Persons are listed as Members in the family case. This is where it is decided which case to link to. If no cases are listed or none are applicable options, a new case may be created. Refer to the following instructions.

- **Link to an existing family case:** If a correct case is presented, follow these next steps; if no correct case is presented, skip to **Link to a new family case** instructions section.

3. From the **Link Case** screen, click the **link** option next to the case to link to.

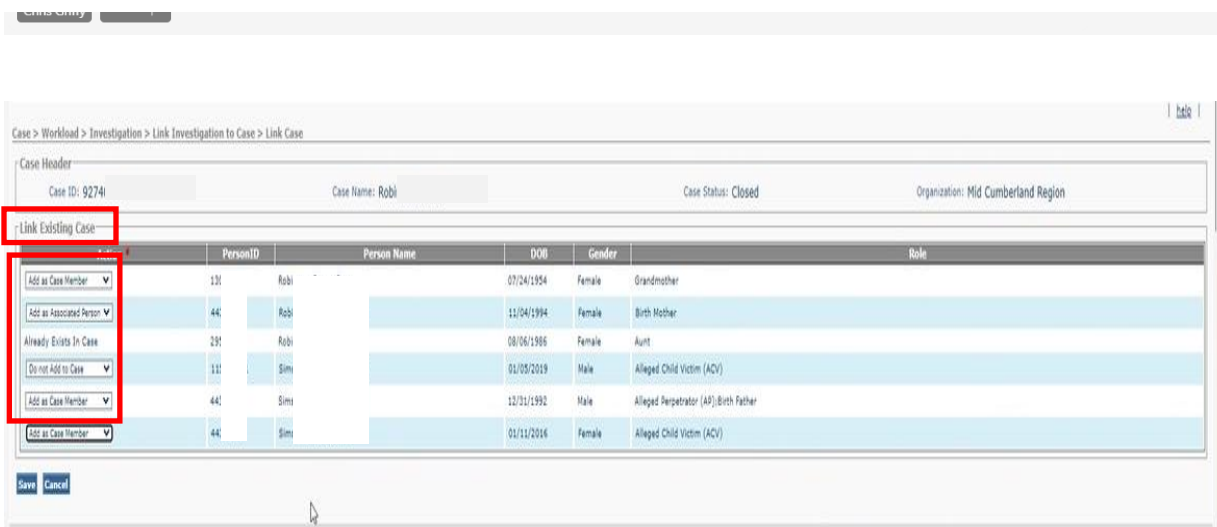
The screenshot shows the 'Link Case' screen with the following table:

link	Case ID	Case Name	Case Status	Status Date	Organization
<a href="#">link</a>			Closed	01/31/2008	TN Valley Region
<a href="#">link</a>			Closed	01/27/2010	TN Valley Region
<a href="#">link</a>			Open	06/08/2015	TN Valley Region
<a href="#">link</a>			Closed	03/07/2010	TN Valley Region
<a href="#">link</a>			Closed	01/31/2008	TN Valley Region
<a href="#">link</a>			Open	05/15/2015	TN Valley Region

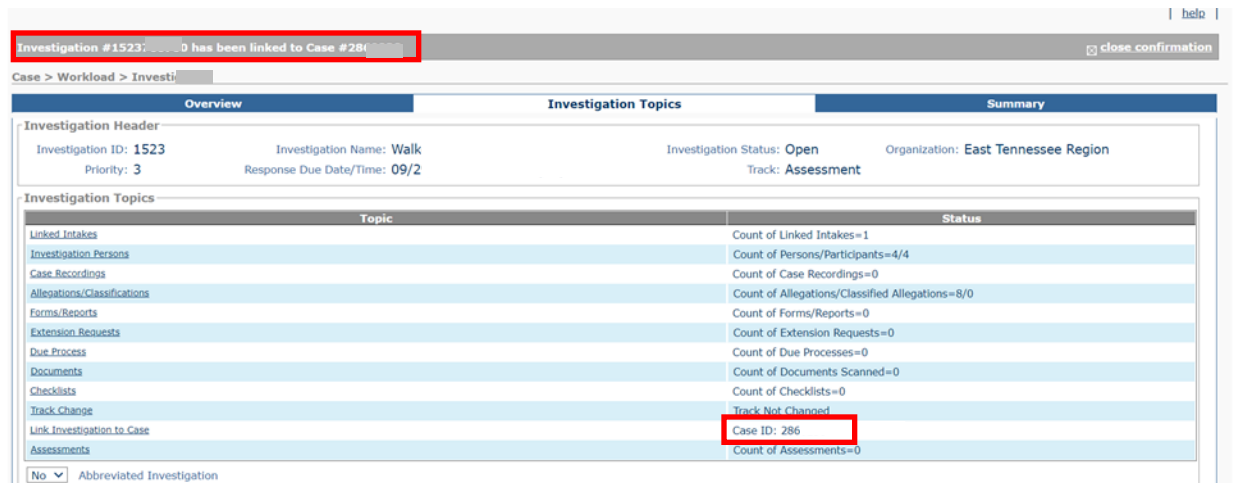
Buttons: Create Case, Cancel

In the **Link Existing Case** screen, choose which action should be taken for each person listed.  
**Note:** Some members may display as **Already Exists in Case**.

4. Click **Save**

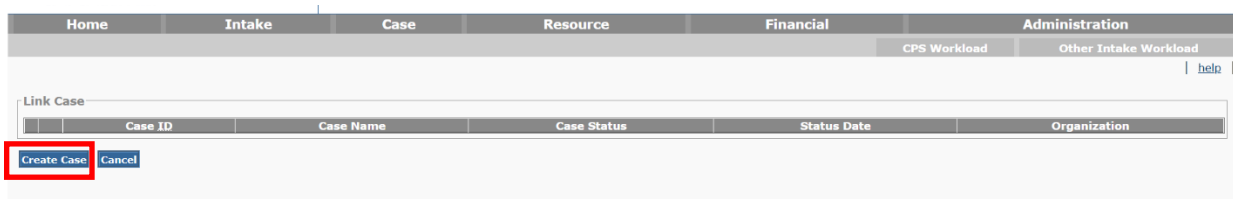


The **Investigation Topics** screen returns and displays a message the investigation ID has been linked to the family case. The **Case ID** now displays next to **Link Investigation to Case** topic.



- **Link to a new family case:**

1. Click **Create Case**



2. **Create Case** screen, select whether each person should be a **Case Member** or an **Associated Person** by clicking the appropriate radio buttons.

3. **Case Reference Person** section, click on the person's name who will be the case reference person in the family case
4. **Responsible County** dropdown, select the correct county
5. Click **Save**

Create Case:

Case Member	Associated Person	Person ID	Person Name	DOB	Role
<input checked="" type="radio"/>	<input type="radio"/>	168	Wal		Alleged Child Victim (ACV)
<input checked="" type="radio"/>	<input type="radio"/>	109	Walk		Alleged Perpetrator (AP), Birth Father, Stepfather
<input checked="" type="radio"/>	<input type="radio"/>	30	Unknown Participant 13		Alleged Perpetrator (AP), Birth Mother
<input checked="" type="radio"/>	<input type="radio"/>	130	Unknown Participant 13864		Alleged Child Victim (ACV), Brother

Case Reference Person:

Responsible County:\*

6. The **Link Case** screen now displays a message the investigation case ID has been linked to a new family case ID. Click on the case name hyperlink to access the family case or click **Close** to return to the **Investigation Topics** screen.

Investigation #15237 0 has been linked to Case #15240 1 close\_confirmation

Link Case

Case ID	Case Name	Case Status	Status Date	Organization
152	<a href="#">Wal</a>	Open	09/29/2023	DCS Central Office

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You have completed this storyboard.