

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

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

Ove	rvlew	Investigation Topics	Summary
Investigation Header-			
Investigation ID:	Investigation Name:	Investi S	gation Open Organization: TN Valley Region
Priority: 2	Response Due Date/Time: 06/23/201	5 11:59 PM (CT)	Track: Assessment
Investigation Topics-			
	Торіс		Status
Linked Intakes			Count of Linked Intakes=1
Investigation Persons			Count of Persons/Participants=4/4
Case Recordings			Count of Case Recordings=4
Allegations/Classifications			Count of Allegations/Classified Allegations=2/0
Forms/Reports			Count of Forms/Reports=0
Extension Requests			Count of Extension Requests=0
Due Process			Count of Due Processes=0
Documents			Count of Documents Scanned=0
<u>Checklists</u>			Count of Checklists=0
Track Change			Track Not Changed
Link Investigation to Case			Case ID:
No Abbreviated Inve 	stigation		
	Suguron		
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.

Home	Intake	Case	Resource	Financial	Administration
				CPS W	orkload 🕴 Other Intake Worklo
					<u> </u>
	1				
ink Case ——					
Ca	ase ID	Case Name	Case Status	Status Date	Organization
≡ <u>link</u>			Closed	01/31/2008	TN Valley Region
G <u>link</u>			Closed	01/27/2010	TN Valley Region
± link			Open	06/08/2015	TN Valley Region
			Closed	03/07/2010	TN Valley Region
± link			Closed	01/31/2008	TN Valley Region
<u>link</u>			Cpen	05/15/2015	TN Valley Region

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

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**

"Y

se Header							_
Case ID: 9274		Case Nam	e: Robi		Case Status: Closed	Organization: Mid Cumberland Region	
k Existing Case							
	Person10) P	erson Name	OB Gend	er	Role	
ód as Case Member 🛛 💙	131	Robi	07/24/1	954 Female	Grandmother		
dd as Associated Person 🗸	44	Robi	11/04/:	994. Female	Birth Mother		
eady Exists In Case	291	Robi	08/06/1	986 Female	Aunt		
a nat Add ta Case 🛛 👻	11	Sim	01/03/3	019 Male	Alleged Child Victim (ACV)		
55 as Case Member 🛛 💙	44]	Sims	12/01/1	992 Male	Alleged Perpetrator (AP);Birth Father		
dd as Case Hember 🗸	44	Sim	01/11/2	016 Female	Alleged Child Victim (ACV)		

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.

estigation #1523iD ha	s been linked to Case #28		🖂 close confirmat
se > Workload > Investi			
Ove	rview	Investigation Topics	Summary
Investigation Header			
Investigation ID: 1523	Investigation Name: Walk	Investigation Status: Open	Organization: East Tennessee Region
Priority: 3	Response Due Date/Time: 09/2	Track: Assessment	t
Investigation Topics			
	Торіс		Status
Linked Intakes		Count of Linked Intakes	-1
Investigation Persons		Count of Persons/Particip	pants=4/4
Case Recordings		Count of Case Recording	s=0
Allegations/Classifications		Count of Allegations/Cla	ssified Allegations=8/0
Forms/Reports		Count of Forms/Reports	=0
Extension Requests		Count of Extension Requ	iests=0
Due Process		Count of Due Processes=	=0
Documents		Count of Documents Sca	nned=0
Checklists		Count of Checklists=0	
Track Change		Track Not Changed	
Link Investigation to Case		Case ID: 286	
Assessments		Count of Assessments=0	

- Link to a new family case:
 - 1. Click Create Case

Home	Intake	Case	Resource	Financial	Administration
					help
Link Case					
Case J	ID C	ase Name	Case Status	Status Date	Organization
Create Case Cancel					

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

Case Member	Associated Person	Person ID	Person Name	DOB	Role
0	0	168	Wai		Alleged Child Victim (ACV)
۲	0	109	Walk		Alleged Perpetrator (AP), Birth Father, Stepfather
\bigcirc	0	130	Unknown Participant 13:		Alleged Perpetrator (AP), Birth Mother
۲	0	130	Unknown Participant 13864		Alleged Child Victim (ACV), Brother
		Unk Unk			
	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.

Investi	gation	#15237 0 has	been linked to Case	#1524(1						⊠ close confirmation
Link C	ase —									
٠	152	Case ID	Wall	Case Name	Open	Case Status	09/29/2023	itatus Date	DCS Central Off	Organization ice
Close										
HOME		HELP & TRAINING	PRIVACY & SEC	URITY		L	/investigation/investig	ation_link_case.jsp	iv01a_s01_link_case	STG32 version 4.006.36 (09-19-2023 12:41 Pl

You have completed this storyboard.