



DFPS

# Case Connection User Guide

Accessing and navigating the Case Connection tool

## **Contents**

Case Connection User Guide .....	2
Logging into Case Connection .....	2
Navigating Around Case Connection .....	4
My Workload.....	4
Team Workload .....	6
Searching by Casa User .....	6
Searching by Child's Name.....	7
Viewing Child Case Information .....	8
Child's Record .....	8
Placement Page .....	12
Med/Dental Page.....	14
Permanency Page .....	17
Demographic Page.....	22
Report Page .....	23
External Documentation .....	25
Appendix .....	30
Sample Case Connection Reports .....	30

# Case Connection User Guide

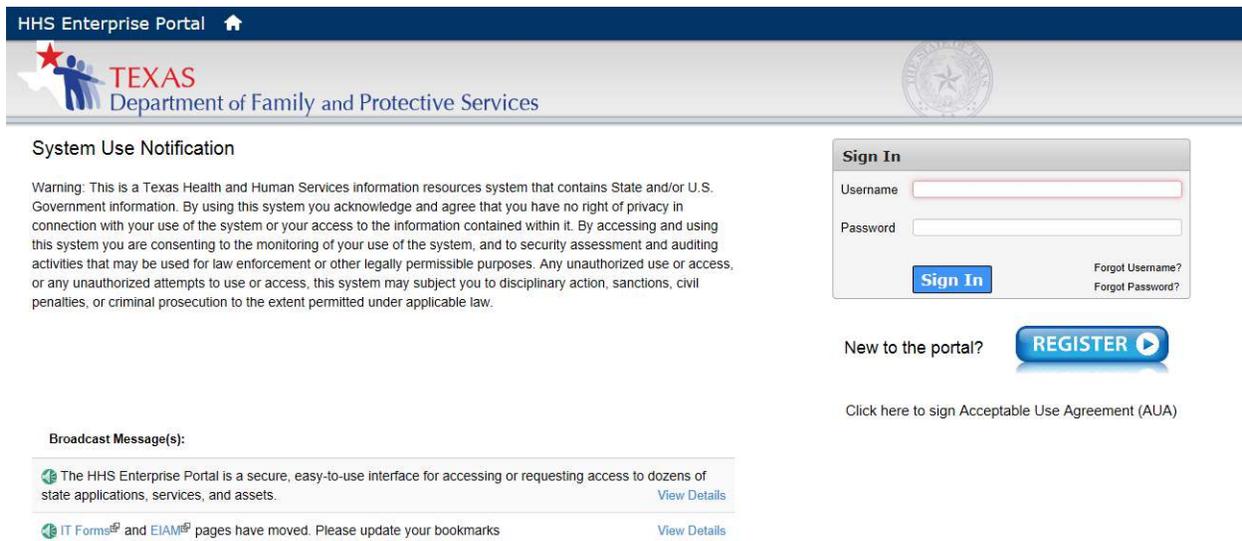
This *Case Connection User Guide* will assist you in becoming more acquainted with the DFPS Case Connection tool. The guide includes written information and screenshots to help you locate specific case information you may be seeking. It is a good starting point in becoming familiar with the case information now available to you online.

This guide assumes you successfully completed all the steps in the *Getting Started* job aid and that were assigned. The *Case Connection User Guide* outlines the steps you will follow to log onto Case Connection Application once access has been granted. This guide will walk you through each tab (i.e., screen) of case information you will find within the application, and describe in detail the fields that you will find on each tab.

## Logging into Case Connection

To access Case Connection, complete the following steps:

1. Open your internet browser and type the following in the address window:  
<https://hhsportal.hhs.state.tx.us/iam/portal/DFPS/>. *The Texas Health and Human Services Enterprise Portal screen appears.*



The screenshot shows the HHS Enterprise Portal login interface. At the top, there is a dark blue header with the text "HHS Enterprise Portal" and a home icon. Below this is a light blue banner with the Texas state logo and the text "TEXAS Department of Family and Protective Services". The main content area is divided into two columns. The left column contains a "System Use Notification" section with a warning about privacy and a "Broadcast Message(s)" section with two messages. The right column contains a "Sign In" form with fields for "Username" and "Password", a "Sign In" button, and links for "Forgot Username?" and "Forgot Password?". Below the sign-in form is a "New to the portal?" section with a "REGISTER" button and a link to sign the "Acceptable Use Agreement (AUA)".

## Case Connection User Guide

2. Enter the Username and Password you defined for access to the portal.

### Sign In

Username

Password

[Sign In](#)

[Forgot Username?](#)  
[Forgot Password?](#)

New to the portal?



[Click here to sign Acceptable Use Agreement \(AUA\)](#)

Field	Definition
<b>Username</b>	Type the username you chose when requesting access to the portal
<b>Password</b>	Type the password you chose the first time you logged into the portal and changed the temporary password

3. Click the **Login** button.
4. Click on the **Case Connection** Link.

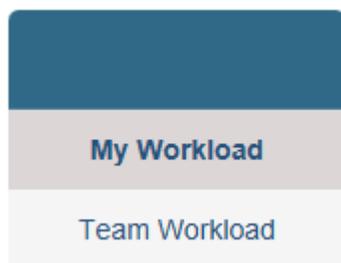


5. You are logged into DFPS Case Connection. The *Assigned Workload* screen appears .

New	Sensitive	Child Name	Person ID	Case Name	Case ID	Stage ID	Type
New		Duncan,Timothy	864429482	Mays,Wille	43015097	64474454	SUB
New		Chamberlain,Wit	644284982	Ruth,Babe	25181349	64167057	SUB
New		Bird,Larry	844062684	Cobb,Ty	43191914	65219208	SUB
New		Abdul-Jabbar,Kareem	588626370	Johnson,Walter	43162966	64936572	SUB
New		James,Lebron	846658070	Aaron,Hank	44260274	67194029	SUB
		Johnson,Magic	684406783	Gehrig,Lou	43545478	65822718	SUB
		Jordan,Michael	698357321	Williams,Ted	43479229	65612412	SUB
		O'Neal,Shaquille	669810580	DiMaggio,Joe	29757789	62803880	SUB

## Navigating Around Case Connection

Depending on whether you are a CASA staff member or a CASA volunteer, All CASA users will see the *My Workload* tab. CASA staff members will see an additional *Team Workload* tab as well. Each Section is defined below:



### My Workload

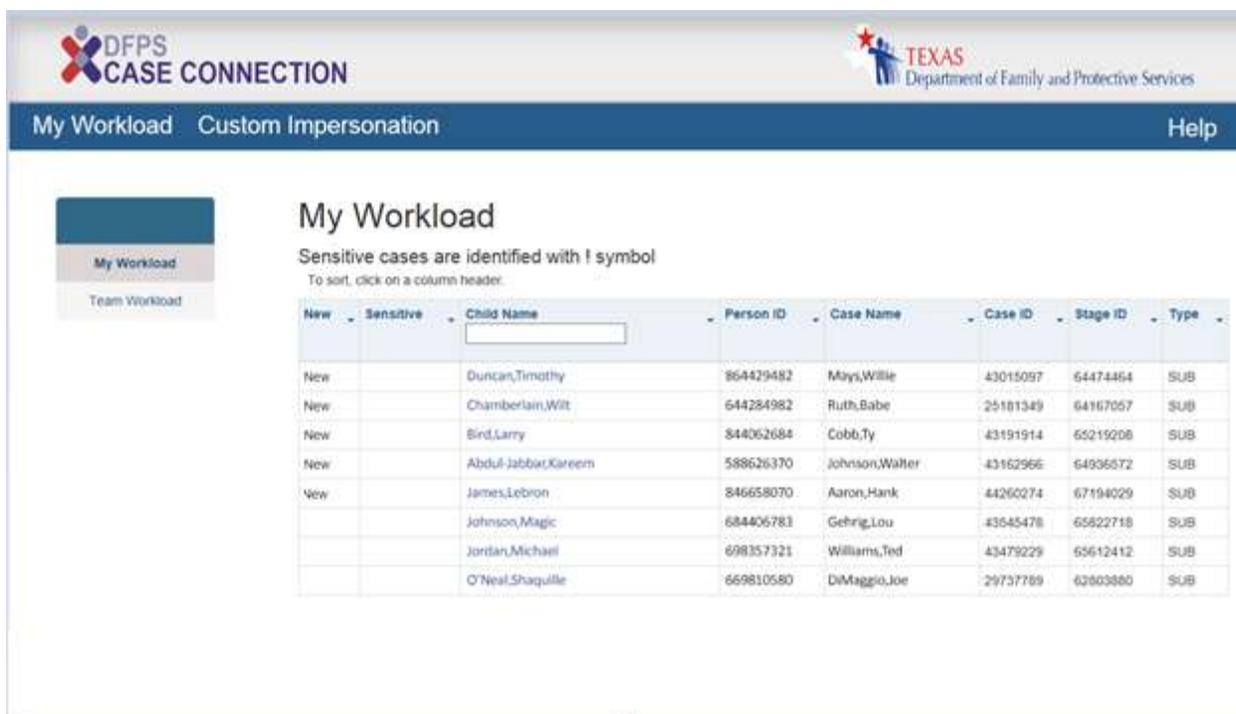
The landing page when you first log into Case Connection is the *My Workload Page*, which displays the cases that CPS has given CASA access to view while the child is in DFPS care. This screen is specific to the CASA Staff or Volunteer that is logged into Case Connection. Case information for each child may be accessed by clicking on the child's name (this will be covered in detail later in this document).

*NOTE: Only cases directly assigned to you will appear on the My Workload Page. If no cases are assigned to you, a blank workload will appear with the statement "No records to display."*

Your name and User ID will appear in the at the top of the screen. You may log out at any time by clicking the **Logout** hyperlink in the right hand corner.

## Case Connection User Guide

**NOTE:** An exclamation point (!) displays in the Sensitive column when the stage belongs to a sensitive case. Sensitive cases are only viewable when assigned to an individual and no one else has access to view.



**My Workload**

Sensitive cases are identified with ! symbol  
To sort, click on a column header:

New	Sensitive	Child Name	Person ID	Case Name	Case ID	Stage ID	Type
New		Duncan, Timothy	864429482	Mays, Willie	43015097	64474464	SUB
New		Chamberlain, Wit	644284982	Ruth, Babe	25181349	64167057	SUB
New		Bird, Larry	844062684	Cobb, Ty	43191914	65219208	SUB
New		Abdul-Jabbar, Kareem	588626370	Johnson, Walter	43162966	64936572	SUB
New		James, LeBron	846658070	Aaron, Hank	44260274	67194029	SUB
		Johnson, Magic	684406783	Gehrig, Lou	43645478	65622718	SUB
		Jordan, Michael	698357321	Williams, Ted	43479229	65612412	SUB
		O'Neal, Shaquille	669810580	DiMaggio, Joe	29737789	62803880	SUB

The information that appears on the *My Workload Page* is as follows. Note that four fields - Child's Name, PID, Case Name and Case ID- are the fields CASA will refer to most often:

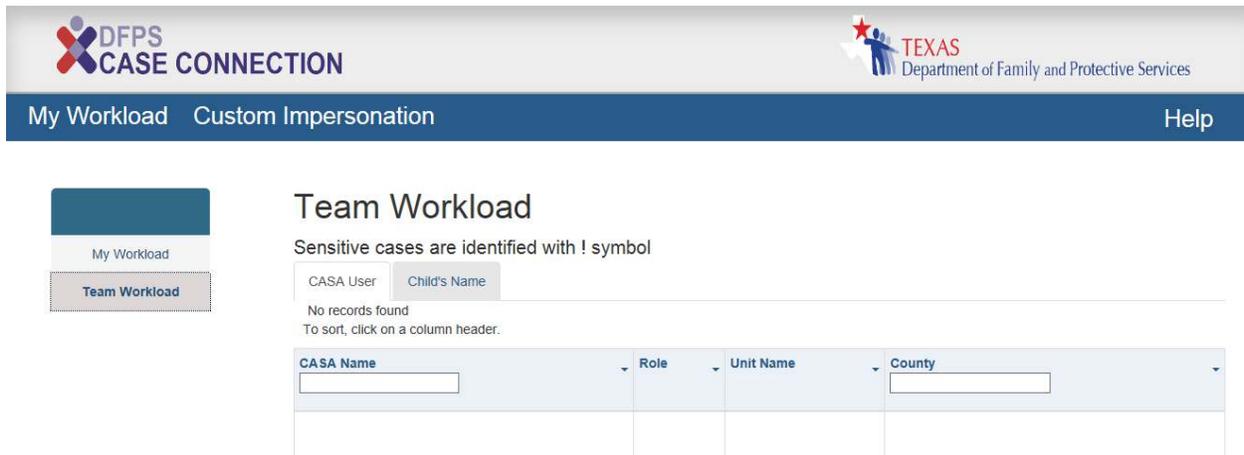
Field	Definition
<b>New</b>	Indicates the case is new to the workload.
<b>Sensitive</b>	<i>An exclamation point (!) displays in the Sensitive column when the stage belongs to a sensitive case. Sensitive cases are only viewable when assigned to an individual and no one else has access to view.</i>
<b>Child's Name</b>	The name of the child who is currently in DFPS care, displayed as a hyperlink. When a CASA clicks on the child's name, they are taken to the <i>Case Summary</i> which provides general information about the case. Field is searchable to allow CASA worker to find their case easily.  <i>NOTE: The Case Summary will be detailed later in this document.</i>
<b>Person ID</b>	Child's assigned Person Identification Number. This number is automatically assigned to the child in IMPACT.
<b>Case Name</b>	The name of the case the stage is associated with. IMPACT uses the parent's name for the case name.
<b>Case ID</b>	The number automatically assigned to the given case in IMPACT
<b>Stage ID</b>	The unique identification number assigned by the system to the stage  <i>NOTE: This is not generally used by CASA. It will only be used when speaking with DFPS staff or calling into the Help Desk.</i>
<b>Type</b>	The abbreviation 'SUB', identifying 'substitute care' as the stage of service, will always appear as the Type.  <i>NOTE: All children for which a CASA is assigned will be in DFPS custody, and therefore will be listed as type "SUB".</i>

## Team Workload

The *Team Workload* Page will be available to CASA staff only. CASA staff will have access to all case information assigned to any individual in their CASA local organization. The exception will be sensitive cases, which are only viewable to those who are directly assigned to the case.

When you first land on the *Team Workload* it will contain two sections: *CASA User* and *Child's Name*. The *CASA User* section contains the name(s) of the CASA staff and volunteers within the local CASA organization (i.e., CASA of South Texas).

The *Team Workload* Main Page is below:



### Searching by Casa User

The *CASA User Page* was built to assist CASA staff in locating specific case information quickly. Searching by *CASA User* will filter the results based on the letters you specified in the name field. If you do not specify, all *CASA Users* within your organization will be included in the *Team Workload* section.

## Team Workload

Sensitive cases are identified with ! symbol



Only the two fields with the text boxes are searchable fields. Each field that appears on the *CASA User Page* is described in the table below:

## Case Connection User Guide

Field	Definition
<b>CASA Name</b>	The name of the CASA, in Last Name, First Name format. The name appears as a hyperlink. Clicking on the name brings you to that individual's ' <i>Assigned Workload</i> ' screen.
<b>Role</b>	The individual's role at CASA (either CASA Staff or CASA Volunteer)
<b>Unit Name</b>	The name of the local CASA organization out of which the CASA works.
<b>County</b>	County the child lives in. This would also be the county the case is assigned to.

The CASA Name appears as a hyperlink. Clicking on the CASA Name will bring you to that CASA's Assigned Workload page.

Figure 1: Clicking on a CASA User name on the *Team Workload* Page directs you to that person's *My Workload* Page. The following are the cases to which CASA User Tree Frog is assigned.

### My Workload

Sensitive cases are identified with ! symbol  
To sort, click on a column header.

New	Sensitive	Child Name	Person ID	Case Name	Case ID	Stage ID	Type
New		Duncan,Timothy	864429482	Mays,Willie	43015097	64474464	SUB
New		Chamberlain,Wilt	644284982	Ruth,Babe	25181349	64167057	SUB
New		Bird,Larry	844062684	Cobb,Ty	43191914	65219208	SUB
New		Abdul-Jabbar,Kareem	588626370	Johnson,Walter	43162966	64936572	SUB
New		James,Lebron	846658070	Aaron,Hank	44260274	67194029	SUB
		Johnson,Magic	684406783	Gehrig,Lou	43545478	65822718	SUB
		Jordan,Michael	698357321	Williams,Ted	43479229	65612412	SUB
		O'Neal,Shaquille	669810580	DiMaggio,Joe	29737789	62803880	SUB

### Searching by Child's Name

You may also search for a specific child's case information by selecting "Child's Name" on the Team Workload Page. Once you enter a first or last name the result(s) will appear in the *Team Workload* section.

Figure 2: Search for a specific child by selecting 'Child's Name' The results appear in the *Team Workload* section.

**Team Workload**

Sensitive cases are identified with ! symbol

CASA User:  Child's Name:

To sort, click on a column header.

New	Sensitive	Child Name	Person ID	Assigned To	County
		James,Lebron	88141781	Frog,Tree	TRAVIS

Showing items: 1 to 1 of 1

Field	Definition
<b>New</b>	Indicates the case is new to the workload.
<b>Sensitive</b>	(!) Indicates a sensitive case
<b>Child's Name</b>	The name of the child who is the subject of the case information in 'Last, First' format. Each name appears as a hyperlink, which navigates you to the child's <i>Case Summary</i> when clicked.  <i>NOTE: If the case is sensitive, the child's name will not be hyperlinked, indicating that the case cannot be accessed by anyone who has not been directly assigned access to the case information.</i>
<b>Person ID</b>	The person ID assigned to the child
<b>Assigned To</b>	The name of the CASA volunteer or staff to which the case is assigned to. Only 3 or less can be assigned to one case at a time.
<b>County</b>	County the child lives in. This would also be the county the case is assigned to.

## Viewing Child Case Information

### Child's Record

Once the hyperlink of the child's name is selected, the *Case Summary* screen appears. This screen provides a brief overview of the child. The child's name PID and other identifying information appears at the top along with the DFPS caseworker's information.

#### **Child's Demographic/DFPS contact Information**

All sections except the *My Workload* and *Reports*, will contain a section at the top of the page that displays the child's demographics as well as contact information DFPS staff members associated with the child's case.

## James,Lebron

<b>Person ID:</b>	88141781	<b>Legal Status:</b>	Adoption Consummated	<b>DFPS Staff Info</b>	
<b>Date of Birth:</b>	07/05/2012	<b>TMC Dismissal Date:</b>		<b>Case Worker:</b>	Brown, Larisa T
<b>Age:</b>	4	<b>Ethnicity:</b>	Declined to Indicate	<b>Phone:</b>	(254) 495-1735
<b>Gender:</b>	Male	<b>Race:</b>	Declined to Indicate	<b>Email:</b>	larisa.brown@dfps.state.tx.us
<b>Language:</b>	English			<b>Case Supervisor:</b>	Barnett,Andrea
<b>Religion:</b>				<b>Phone:</b>	(254) 717-8562
				<b>Email:</b>	andrea.barnett@dfps.state.tx.us

The following child demographic/DFPS contact information is displayed:

Field	Definition
<b>Name</b>	Child's name in Last, First format
<b>PID</b>	Child's person id in IMPACT
<b>Date of Birth</b>	Child's date of birth in MM/DD/YYYY format
<b>Age</b>	Age of the child based on today's date and the child's date of birth
<b>Gender</b>	The child's gender. May be listed as Male, Female or Unknown
<b>Ethnicity</b>	The child's ethnicity. This could be listed as 'Hispanic', 'Not Hispanic', 'Individual Declined to Indicate', or 'Unable to Determine'
<b>Legal Status</b>	Displays the most recent Legal Status recorded in IMPACT. Example: TMC-Temporary Managing Conservatorship; PMC - Permanent Managing Conservatorship; Care, Custody and Control, Other, Adoption Consummated, etc.) .
<b>TMC Dismissal Date</b>	TMC Dismissal Date will be automatically calculated as the date of the first Monday after the one year anniversary of the Effective Date. This date will pre-fill the TMC Dismissal Date field. The TMC Dismissal Date can have one extension of up to six months. If the court assigns a new dismissal date, DFPS may modify this date manually
<b>Religion</b>	Displays the child's religion
<b>Race</b>	Race of the child. May be one or more of the following: 'American Indian/Alaskan Native', 'Asian', 'Black', Native Hawaiian/Pacific Islander', White, 'Unable to Determine'. If "American Indian/Alaskan Native" is checked, the following questions displays: "Is this person verified to be enrolled for membership in a federally recognized tribe?" Yes, No or Not Yet Verified
<b>Legal Status</b>	Legal Status listed in IMPACT
<b>Language</b>	Primary language of the child.
<b>DFPS Staff Info</b>	Name, phone number and email address of the primary DFPS caseworker and supervisor assigned to the child's case

The Case Summary section appears below:

*Any blank fields indicate the information is not available in IMPACT at the time of creation.*

- Summary
- Placement
- Medical / Dental
- Education
- Permanency
- Demographics
- Reports
- Legal
- External Documents

## Case Summary

### Placement

Placement Name:  
 Placement Type:  
 Placement Contact #:  
 Date Placed:  
 Placement Address:  
 Level of Care:

### Medical / Dental

Medicaid ID #:  
 Last Annual Medical  
 Appointment:  
 Last 6 Month Dental  
 Appointment:

At any time, you may click the *My Workload Tab* to be taken back to their Assigned Workload or choose to logout of DFPS Case Connection by clicking the **Logout** hyperlink.

*NOTE: CASA Staff may also assess Case Summary information via the Team Workload.*

The case information on the *Summary* page is described below.

### **Placement:**

## Placement

**Placement Name:**  
**Placement Type:**  
**Placement Contact #:**  
**Date Placed:**  
**Placement Address:**  
**Level of Care:**

The Placement Section displays the most recent, active and approved Placement Information for the child.

Field	Definition
<b>Placement Name</b>	If the placement is a foster home, the placement name will be the name of the foster parent.
<b>Placement Type</b>	Type of placement the child is in. Examples Kinship, emergency
<b>Placement Contact #</b>	The telephone number for the child's placement

Field	Definition
<b>Date Placed</b>	The beginning date of the placement for the child currently placed or that has been placed in the past
<b>Placement Address</b>	Address of the placement where the child is placed
<b>Level of Care</b>	The determination of a child's needs and the services required to meet those needs. The Levels of Care are 'Basic', 'Moderate', 'Specialized', and 'Intense'.

**Medical/Dental:**

## Medical / Dental

Medicaid ID #:

Last Annual Medical

Appointment:

Last 6 Month Dental

Appointment:

This section lists the child's most recent Medical/Dental information provided from IMPACT. If data has not been entered in IMPACT, there will be no data displayed in this section.

Field	Definition
<b>Medicaid ID#</b>	Medicaid number for the child
<b>Last Annual Medical Appointment</b>	The date of the child's last annual medical appointment
<b>Last 6 Month Dental Appointment</b>	The date of the child's last 6 month dental checkup

**Education:**

## Education

School Grade:

School Name:

School Address:

This section lists the child's most recent Educational information. If data has not been entered in IMPACT, there will be no data in this section.

Field	Definition
<b>School Grade</b>	The grade level of the child upon enrollment to the school
<b>School Name</b>	Name of the school the child is attending
<b>School Address</b>	Physical address for the school

## Permanency:

### Permanency

**Permanency Goal:**

**Concurrent Goal:**

**Next Child Plan of**

**Service Due:**

This section displays the child's most recent Permanency Goal, Concurrent Goal and due date of the next Child Plan. If a child's plan is not completed in IMPACT a comment will state, "No records to display."

Field	Definition
<b>Permanency Goal</b>	The permanency goal listed in the child's most recent service plan. Options may be <ul style="list-style-type: none"> <li>• Family Reunification</li> <li>• Alt Family: Relative, Adoption</li> <li>• Alt Family: Relative, Conservatorship</li> <li>• Alt Family: Unrelated, Adoption</li> <li>• Alt Family: Unrelated, Conservatorship</li> <li>• Alt Family: Foster Family, DFPS Conservatorship</li> <li>• Alt Family: Other Family, DFPS Conservatorship</li> <li>• Independent Living</li> <li>• Community Care</li> </ul>
<b>Concurrent Goal</b>	An alternate permanency goal which is pursued simultaneously with the permanency goal
<b>Next Child Plan of Service Due</b>	The date of the next service plan review meeting

## Placement Page

Selecting the *Placement* tab displays the *Placement Information*, which provides a detailed snapshot of the child's current and previous placements.

- Summary
- Placement
- Medical / Dental
- Education
- Permanency
- Demographics
- Reports
- Legal
- External Documents

### Placement

Placement Name: Castaneda,Delores  
 Placement Type: Kinship only (non-licensed)  
 Placement Contact #: (254) 218-0078  
 Date Placed: 01/06/2015  
 Placement Address: 914 TAHOE TRL, HEWITT, TX, 76643  
 Level of Care: Basic

---

### Placement Detail

Start Date: 01/06/2015  
 Description: Act Start 01/06/2015 Castaneda,Delo Relative's Home  
 More Info: Placement Information Form

---

### Daycare

Name:  
 Address:  
 Phone:  
 Begin Date:

---

### Additional Placement Information

[Generate Placement History Log](#)

No records found  
 To sort, click on a column header.

Date	Description

## Case Connection User Guide

### **Child's Demographic/DFPS Contact Information**

This is a repeat of the Child's Demographic/DFPS Contact Information section that appears on the Workload Page. Click [here](#) (or see Page 13 for section details).

#### **Placement:**

The Placement Section is carried over from the *Summary* tab and displays the most recent, active and approved Placement Information for the child, including type of placement, address, phone number and child's level of care. See Page 13 for field definitions.

#### **Placement Details:**

The placement detail section provides individual forms of the child's current and previous placements.

Field	Definition
<b>Start Date</b>	The date the child was placed in the home or facility
<b>Description</b>	Description of the placement Description will appear for all approved placements
<b>More Info</b>	A hyperlink leading to a pop up which provides more details on past and present placements for the child. A hyperlink for the Placement Information Form will appear. This form will provide more detailed information about each individual placement.

#### **Daycare:**

Daycare information should populate only if the child has an active daycare entry, otherwise, a comment will state "No Day Care Information is present." Only the most recent daycare information will appear in this section. If populated, the daycare fields will display as follows:

Field	Definition
<b>Name</b>	The name of the daycare facility the child currently attends
<b>Address</b>	The address of the daycare facility
<b>Phone</b>	The telephone number for the daycare facility.
<b>Begin Date</b>	The date the child began attending the daycare

#### **Additional Placement Information:**

This section provides additional documents associated with the child's placement such as the *Placement History Log* and the *Common Application*. If a common application is not generated in IMPACT, it will not display in Case Connection.

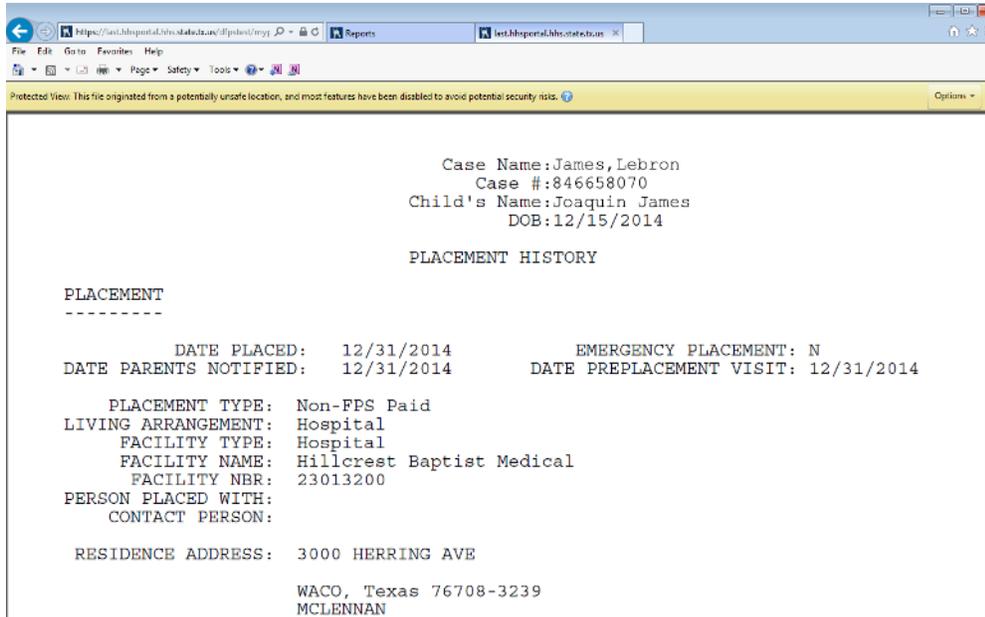
#### **Placement Log:**

### Reports

To sort, click on a column header.

Child's Name	Stage ID	Description	File Name	File Status	Date Generated
James,Lebron	67194029	Placement Log	d125c3f8ae245c69747ee7a2ce64f0.pdf	COMP	08/18/2016

Once complete select the hyperlink to the Placement log:



## Med/Dental Page

Selecting the Med/Dental tab navigates you to *Medical/Dental/Education Detail*.

- Summary
- Placement
- Medical / Dental
- Education
- Permanency
- Demographics
- Reports
- Legal
- External Documents

### Medical / Dental Detail

Medicaid ID #: 703331314  
 Last Annual Medical Appointment: 01/21/2016  
 Last 6 Month Dental Appointment: 01/08/2016

---

#### Medical Consenter

To sort, click on a column header.

Type	Name	Phone Number	Court Authority	DFPS Designee	Rel/Int	Start Date
Primary	Castaneda, Delores	(254) 218-0078	DFPS	Live in caregiver	Aunt/Uncle	01/06/2015
Backup	Irby, Tiesha	(254) 292-3157	DFPS	DFPS employee	Staff	01/03/2015

Showing items: 1 to 2 of 2

---

#### Additional Information

[Generate Medical/Mental Assessment Log](#)  
[Medical/Developmental History](#)

### **Child's Demographic/DFPS contact Information**

This is a repeat of the *Child's Demographic/DFPS Contact Information* section that appears on the Case Summary Page. Click [here](#) (or see Page 13 for section details).

### **Medical/Dental:**

This section repeats the Medical/Dental information that was provided on the *Summary* tab. It lists the child's most recent Medical/Dental information provided from IMPACT which includes their Medicaid number, the child's last annual medical appointment and their last six month dental appointment. See page 13 for field definitions.

### **Medical Consenters:**

## Case Connection User Guide

Medical Consenters are individuals who are authorized to make decisions on whether to agree or not agree to a medical test, treatment, procedure, or a prescription medication. The Medical Consenters section displays only active medical consenters for the child. Any Medical Consenter that has an end date in IMPACT will not appear on this list. Specific information related to the medical consenter will include:

Field	Definition
<b>Type</b>	Displays the type of medical consenter (i.e., Primary or Backup)
<b>Name</b>	The name of the medical consenter
<b>Phone Number</b>	The telephone number of the medical consenter
<b>Court Authority</b>	<p>Indicates the Court in which a hearing was held authorizing the person to act as medical consenter. When a judge gives DFPS the power to consent to medical care for a child, the agency chooses up to four primary and backup medical consenters. There can be two primary and two backup. The two primary medical consenters are usually the child's caregivers or a caseworker and another CPS staff. DFPS may choose medical consenters and backup medical consenters who are:</p> <ul style="list-style-type: none"> <li>• Professional employees of emergency shelters</li> <li>• Foster parents</li> <li>• Relatives</li> <li>• CPS caseworkers, supervisors or other CPS staff</li> </ul>
<b>DFPS Designee</b>	Displays the person's DFPS designation
<b>Rel/Int</b>	The relationship (or interest) of the medical consenter to the child
<b>Start Date</b>	The date this person became a medical consenter for the child

### Additional Information:

This section displays additional documents that can be generated with Medical information.

Available documents include:

- Medical Mental Assessment Log

After launching the report, navigate to the Reports tab. To access the report click an available hyperlink such as "Medical Mental Assessment Log", the system will route you to the Reports tab. You may then click on the hyperlink of the desired report you wish to view.

## Reports

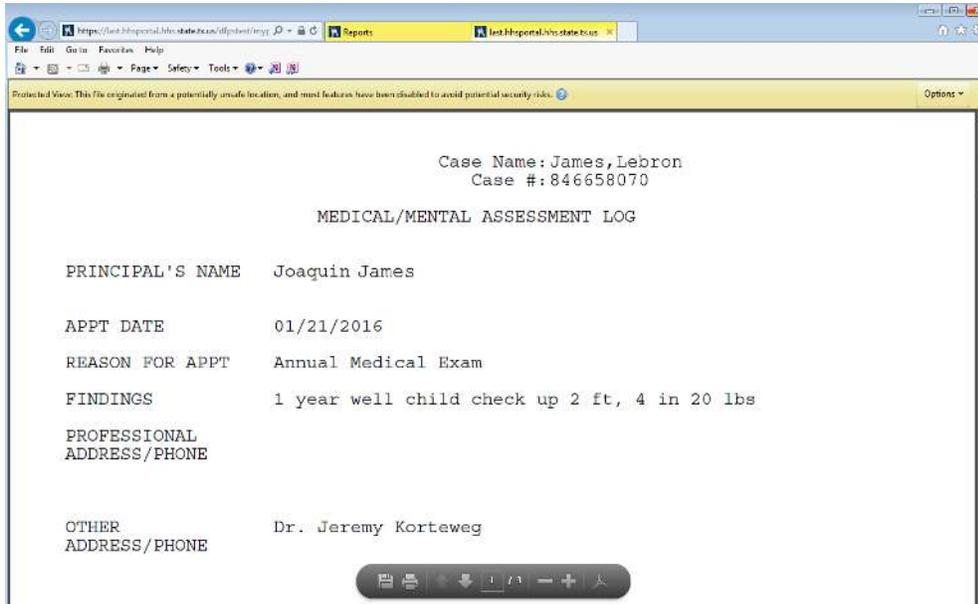
To sort, click on a column header.

Child's Name	Stage ID	Description	File Name	File Status	Date Generated
James,Lebron	67194029	Medical/Mental Log	18975245224e51ae352926e5114990.pdf	PEND	null

## Case Connection User Guide

*NOTE: The status in Report List will show pending or complete. The system may take up to 20 seconds to generate the report.*

Select the hyperlink to the Medical/Mental Log:



## Education Page

By selecting the Education tab the Education Page appears:



This section repeats the fields found in the Education section on the *Summary* Tab, and includes an additional field called 'Last ARD', which is defined in the table below. See page 14 for the field definitions for repeat fields.

Field	Definition
<b>Last ARD</b>	ARD is an abbreviation for Admission, Review, and Dismissal. The ARD is a meeting of public school personnel, CPS caseworker and/or parents to discuss the child's education performance and plan. 'Last ARD' is the date on which the most recent ARD took place

### Additional Information:

## Case Connection User Guide

This section displays additional documents that can be generated with Educational information. Available documents include:

- Education Log

After launching the report, navigate to the Reports tab. To access the report click an available hyperlink such as "Education Log", the system will route you to the Reports tab. You may then click on the hyperlink of the desired report you wish to view.

## Reports

To sort, click on a column header.

Child's Name	Stage ID	Description	File Name	File Status	Date Generated
James,Lebron	67194029	Education Log	74d7a55bb9a42b818cc30e2a4bd2e1.pdf	COMP	08/18/2016

Protected View: This file originated from a potentially unsafe location, and most features have been disabled to avoid potential security risks.

```

Case Name: James, Lebron
Case ID: 846658070

EDUCATION LOG

PERSON NAME: Joaquin James
PERSON ID: 84391320
    
```

## Permanency Page

The Permanency tab displays the Permanency Detail page which provides a detailed view of the child's permanency. The Child Plans, Family Plans and other documents related to the child's permanency appear on this page.

- Summary
- Placement
- Medical / Dental
- Education
- Permanency
- Demographics
- Reports
- Legal
- External Documents

## Permanency Detail

Child Plans	Family Plans	Permanency Planning Meeting (PPM)	Visitation Plan
Permanency Goal:		Alt Family, Relative/Fictive Kin, Adoption	
Concurrent Goal:			
Next Child Plan Due Date:		05/31/2016	
Next Family Plan Due Date:		05/13/2015	

## Child Plans

To sort, click on a column header.

Review Completed Date	Description
02/08/2016	Child's Service Plan -Review Completed 02/08/2016
06/30/2015	Child's Service Plan -Review Completed 06/30/2015
03/24/2015	Child's Service Plan -Review Completed 03/24/2015
01/31/2015	Child's Service Plan -Initial Plan Completed 01/13/2015

Showing items: 1 to 4 of 4

## Child's Demographic/DFPS contact Informtion

This is a repeat of the *Child's Demographic/DFPS Contact Information* section that appears on the Case Summary Page. Click [here](#) (or see Page13) for section details.

## Permanency

This section repeats the fields found in the Permanency section on the *Summary* tab, and includes an additional field called 'Next Family Plan Due Date', which is defined in the table below. See page 14 for the field definitions for repeat fields.

Field	Definition
<b>Next Family Plan Due Date</b>	The date of the next family plan review. Family plan reviews progress the family is making to achieve the identified outcomes

## Child Plans

This section provides all of the previous and current approved Child Plans. Click on a hyperlink for a specific child plan and it will open in a new browser window. No data will be displayed if a Child Plan has not been entered into IMPACT.

- Summary
- Placement
- Medical / Dental
- Education
- Permanency
- Demographics
- Reports
- Legal
- External Documents

## Permanency Detail

Child Plans	Family Plans	Permanency Planning Meeting (PPM)	Visitation Plan
Permanency Goal:		Alt Family, Relative/Fictive Kin, Adoption	
Concurrent Goal:			
Next Child Plan Due Date:		05/31/2016	
Next Family Plan Due Date:		05/13/2015	

## Child Plans

To sort, click on a column header.

Review Completed Date	Description
02/08/2016	Child's Service Plan -Review Completed 02/08/2016
06/30/2015	Child's Service Plan -Review Completed 06/30/2015
03/24/2015	Child's Service Plan -Review Completed 03/24/2015
01/31/2015	Child's Service Plan -Initial Plan Completed 01/13/2015

Showing items: 1 to 4 of 4

Field	Definition
<b>Review Completed Date</b>	The date the child plan was reviewed

Field	Definition
Description	The name of the Child Plan, displayed as a hyperlink. Clicking on the hyperlink will bring up the Child Plan in a new browser.

By selecting the hyperlink the IMACT form appears:

The screenshot shows a web browser window with the URL <https://last.lhhsportal.lhs.state.tx.us/dfp/step/my>. The page title is "Permanency" and the browser tab is "CASE Connection".

Case Information:

- Case Name: James Lebron
- Case #: 94859870
- Child's Name: Joaquin James
- DOB: 12/15/2014

**CHILD'S SERVICE PLAN Review**

Service Plan Review

**OVERVIEW:**

A. General:

Date of Last Plan	Date This Plan Completed	Date of Next Review
5/30/2015	2/8/2016	5/31/2016

Note: This plan has been reviewed based on this child's special strengths and needs. Services have been planned to meet the child's needs.

Worker Who Completed Form  
Babe Ruth

B. Current Placement

Residence Name	Living Arrangement	Type of Facility
Dimaggio, Joe	Relative's Home	

C. Long-Range Goal For Permanency (See last page for definitions.)

Permanency Goal	
Alt Family: Relative/Fictive Kin, Adoption	
Projected Date for Achieving Permanency	Estimated Length of Stay in Substitute Care
5/31/2016	one year and 0 months

If there is a discrepancy between the estimated length of stay in substitute care and the projected date of permanency, explain:  
Joaquin is moving to the adoption's unit.

D. Concurrent / Alternative Goal for Permanency (See last page for definitions.)

Note: This child plan has no concurrent goals.

Justification for no concurrent goal:  
Joaquin is going to be adopted by his aunt Ms. Castaneda.

**PROGRESS IN ADDRESSING NEEDS & PROVIDING SERVICES SINCE LAST PLAN**

Caregiver observations about child's personality, behavior, special interests, and talents  
Joaquin is a baby. He enjoys sleeping and eating. Joaquin is now walking and enjoying playing with his toys.

## Family Plans

The Family Plan will pull from the Family Sub Care Stage (FSU) that is related to the assigned SUB care stage. All approved Family Plans will display in this section. Click on a family plan hyperlink and the plan will open in a new browser. If there is not an open FSU or FRE stage, there will not be a Family Plan. If there are no Approved Family Plans, then "No Records to Display" will be noted.

Summary
Placement
Medical / Dental
Education
<b>Permanency</b>
Demographics
Reports
Legal
External Documents

### Permanency Detail

Child Plans	<b>Family Plans</b>	Permanency Planning Meeting (PPM)	Visitation Plan
Permanency Goal:		Alt Family: Relative/Fictive Kin, Adoption	
Concurrent Goal:			
Next Child Plan Due Date:	05/31/2016		
Next Family Plan Due Date:	05/13/2015		

### Family Plans

To sort, click on a column header.

Review Completed Date	Description
01/13/2015	FSU REG Family Plan completed 01/13/2015

Showing items: 1 to 1 of 1

Field	Definition
Review Completed Date	The date the family plan was review was completed
Description	The name of the Family Plan, displayed as a hyperlink.

By clicking the hyperlink the IMPACT Form appears:

Case Name: James,Lebron  
Case #: 846558070

FAMILY SERVICE PLAN

Substitute Care

IDENTIFYING INFORMATION:

Name(s) of Parent(s)  
Lebron James, Mary James

Name(s) of Child(ren)  
Joaquin James

PLAN DATES:

Plan Completed/Conference Date: 1/13/2015  
Month/Year of Next Review: 05/2015

PERMANENCY GOALS: (See last page for definitions.)

Child's Name	Permanency Goal	Target Date
Joaquin James	Alt Family: Relative/Fictive Kin, Adoption	12/28/2015

PARTICIPANTS (Principals and Collaterals on case):

Name	Relationship
Joaquin James	Oldest Victim
Lebron James	Parent
Mary James	Parent

REASON FOR CHILD PROTECTIVE SERVICES INVOLVEMENT:

The Department became involved with this family due to receiving a referral that Ms. Montoya had Joaquin while in a coma after overdosing on valium. Joaquin's meconium was found positive for benzodiazepines, opiates, and methamphetamines. Ms. Montoya was found to be positive amphetamines and benzodiazepines. Ms. Montoya gave birth to Joaquin prematurely at 34 weeks pregnant, possibly due to the drug overdose. After Joaquin was born both Ms. Montoya and Joaquin were on life support for several days. Joaquin suffered from withdrawal symptoms, including agitation, excessive sneezing, and high blood pressure. Ms. Montoya and Mr. Thompson's oldest child, Brena is currently in the Department's custody as of March 2014. The parents have not actively participated in services in that case or made significant changes toward reunification.

FAMILY STRENGTHS AND SUPPORTS:

Both parents have family support. The parents love their children. Mr. Thompson reportedly recently obtained a job.

COMMUNITY SUPPORTS:

Ms. Montoya and Mr. Thompson are able to access community resources as needed. Worker can refer them to any community resources if needed. Ms. Montoya has a court appointed attorney in this case and Mr. Thompson is able to request a court appointed attorney if he qualifies as indigent.

HOPES AND DREAMS FOR THE CHILD(REN):

The parents would like to be a family with their children.

PARENT(S) RESPONSIBILITIES RELATED TO CHILD(REN)'S EDUCATION:

Joaquin is not currently school aged.

### Permanency Planning Meeting (PPM):

This section will list any Permanency Planning Meeting notes and Visitation Plans. If there are no existing documents, then "No Records to Display" will be noted.

- Summary
- Placement
- Medical / Dental
- Education
- Permanency**
- Demographics
- Reports
- Legal
- External Documents

#### Permanency Detail

Child Plans	Family Plans	Permanency Planning Meeting (PPM)	Visitation Plan
Permanency Goal:		Alt Family: Relative/Fictive Kin, Adoption	
Concurrent Goal:			
Next Child Plan Due Date:		05/31/2016	
Next Family Plan Due Date:		05/13/2015	

#### Permanency Planning Meeting (PPM)

To sort, click on a column header.

Review Completed Date	Description
05/28/2015	Permanency Conference 05/27/2015
01/28/2015	Permanency Conference 01/28/2015

Showing items: 1 to 2 of 2

Field	Definition
<b>Review Completed Date</b>	The date the Permanency planning meeting occurred
<b>Description</b>	The name of the Permanency Plan, displayed as a hyperlink.

By selecting the hyperlink the IMPACT Form appears:

## Visitation Plan

This section will list all visitation plans in any status. If there are no plans in IMPACT, "No records to display" will be noted.

- Summary
- Placement
- Medical / Dental
- Education
- Permanency**
- Demographics
- Reports
- Legal
- External Documents

### Permanency Detail

Child Plans	Family Plans	Permanency Planning Meeting (PPM)	Visitation Plan
Permanency Goal:		All Family-Relative/Fictive Kin, Adoption	
Concurrent Goal:			
Next Child Plan Due Date:		05/31/2016	
Next Family Plan Due Date:		05/13/2015	

### Visitation Plan

No records found  
To sort, click on a column header.

Review Completed Date	Description

Field	Definition
<b>Review Completed Date</b>	The date the Visitation Plan was completed
<b>Description</b>	The name of the Visitation Plan, displayed as a hyperlink.

## Demographic Page

Selecting the Demographics link navigates you to the *Demographics Details* screen and displays the Significant Person List which lists all the Principals and Collaterals along with their Role, Phone number, and email. The child's characteristics will also display on this screen.

### Demographic Details

#### Significant Persons

To sort, click on a column header.

Name	Role	Phone Number	Email
Frog, Tree,	CASA		frog.tree@CASA.org
James, Lebron,	Oldest Victim	(512) 555-6845	
Leonard, Kawhi,	Parent	(512) 555-6845	
Thompson, Klay,	Fictive Kin	(800) 555-5400	

Showing items: 1 to 4 of 4

#### Characteristics

To sort, click on a column header.

Category	Characteristic	Status
AFCARS Disability	Is the child disabled?	No

### **Child's Demographic/DFPS contact Information**

This is a repeat of the *Child's Demographic/DFPS Contact Information* section that appears on the Case Summary Page Click [here](#) (or see Page 13 for section details).

### **Significant Persons**

This section displays the most current name and contact information for all persons involved in the child's case while the child is in DFPS care. If the phone number or email address field is blank then it has not yet been entered into IMPACT.

Field	Definition
<b>Name</b>	The full name of the individual in 'Last Name, First Name' format
<b>Role</b>	The relationship between the associated person and the person whose person detail is being viewed
<b>Phone Number</b>	The most recent phone number for the person
<b>Email</b>	The person's email address

### **Child's Characteristics:**

This section provides a list of the child's active characteristics listed from the Child-Investigation and the Child-Placement with the status of either Suspected or Diagnosed. If the AFCARS disability question - "Is the child disabled?" - is populated the response is displayed.

Field	Definition
<b>Category</b>	The category in which the Characteristic exists
<b>Characteristic</b>	The characteristic of the child
<b>Status</b>	The status of the Characteristic, either "Suspected" or "Diagnosed". For AFCARS Disability, however, the status will be "Yes" or "No".

## Report Page

This section displays any reports, various files, or documents that you generated on previous Pages. Once the document is in Complete status, click on the hyperlink(s) under file name and the report will appear. Reports remain on the *Reports* tab for 24 hours. Children's case information changes rapidly, and running the report again ensures you have the most up-to-date information as possible.

If no report hyperlinks to reports have been clicked on any other tab, the Report List will be empty, and will read "No records to display":

*NOTE: A list of reports and the means by which they will appear (i.e., pop-up window or reports tab) can be found in the Appendix [Sample Case Connection Reports](#) section.*

## Reports

To sort, click on a column header.

Child's Name	Stage ID	Description	File Name	File Status	Date Generated
James,Lebron	67194029	External Documentation	<a href="#">a6da1a58cfd8d1c1f83759858d8fae.pdf</a>	COMP	08/17/2016
James,Lebron	67194029	Medical/Mental Log	<a href="#">1fbcd2534fbbcce7bad771f7356f1.pdf</a>	COMP	08/17/2016
James,Lebron	67194029	Placement Log	<a href="#">a56f11ac59867b1298fb8cbb97aee0.pdf</a>	COMP	08/17/2016
James,Lebron	67194029	Placement Log	<a href="#">f639f2fb88bf08dcca6f15badbba.pdf</a>	PEND	
James,Lebron	67194029	Medical/Mental Log	<a href="#">ebc786fd464111706f7ef4c2d25c.pdf</a>	COMP	08/17/2016

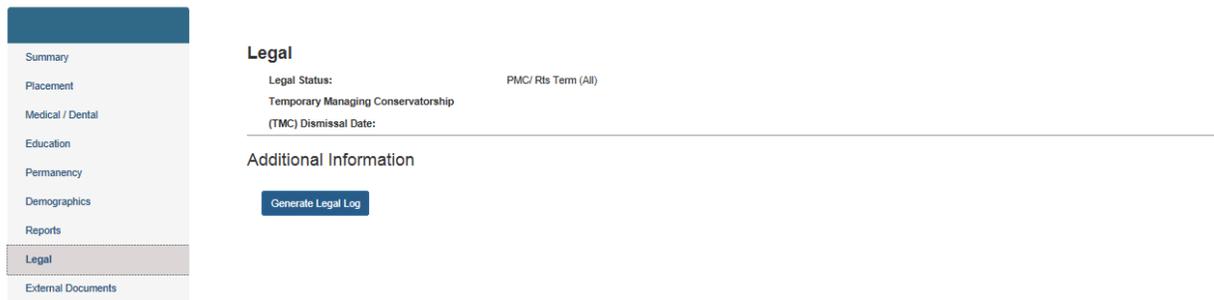
The fields appearing on the *Reports* tab are described in the table below:

Field	Definition
<b>Child's Name</b>	The name of the child who is currently in DFPS care
<b>Stage ID</b>	The unique identification number assigned by the system to the stage
<b>Description</b>	The description of the report. The description closely resembles the file name you clicked on to run the report
<b>File Name</b>	The system-generated file name, displayed as a hyperlink. Click on the file name to view the report

Field	Definition
<b>File Status</b>	The status of the file. This will be either 'Pending' or 'Completed'. Files with a status of 'Pending' should change to Completed within 2 minutes make sure to refresh the page to see updated status. If file status does not complete after that time, contact the IAM Rep at your local CASA organization
<b>Date Generated</b>	The date and time that the report was generated in mm/dd/yyyy hh:mm:ss format

## Legal

Selecting the Legal tab navigates you to the *Legal Details* screen and displays the Legal detail including Status and dismissal dates.



### ***Child's Demographic/DFPS contact Information***

This is a repeat of the *Child's Demographic/DFPS Contact Information* section that appears on the Case Summary Page. Click [here](#) (or see Page 13 for section details).

### **Additional Information:**

This section displays additional documents that can be generated with Legal information. Available documents include:

- Legal Status Log

After launching the report, navigate to the Reports tab. To access the report click an available hyperlink such as "Legal Log", the system will route you to the Reports page. You may then click on the hyperlink of the desired report you wish to view.

## Reports

To sort, click on a column header.

Child's Name	Stage ID	Description	File Name	File Status	Date Generated
James,Lebron	67194029	CPS Legal Log	d24aa67149738b29265f8cdc611a30.pdf	COMP	08/18/2016

By selecting the hyperlink the IMPACT Report appears:

Person Name: Joaquin James

CPS LEGAL LOG

LEGAL STATUS

LEGAL STATUS: PMC/ Rts Term (All) STATUS DATE: 12/15/2015  
 COUNTY: MCLENNAN  
 CAUSE NUMBER: 4112-82-0779  
 COURT NUMBER: JDC 74  
 TMC DISMISSAL DATE:

LEGAL STATUS: TMC STATUS DATE: 12/31/2014  
 COUNTY: MCLENNAN  
 CAUSE NUMBER: 2014-4976-3  
 COURT NUMBER: JDC 74  
 TMC DISMISSAL DATE: 01/04/2016

LEGAL ACTION

DATE FILED: OUTCOME DATE: 12/15/2015  
 LEGAL ACTION: CVS Orders OUTCOME:  
 ACTION SUBTYPE: PMC to Agency Rts Term All DOCUMENT IN CASE FILE: N  
 COMMENTS:

## External Documentation

Selecting the External Documentation tab navigates you to the *External Documentation Details* screen allows for document uploads and displays a list of documents the CASA user has already uploaded to the case.

**External Documents**

Uploaded Files

No records found  
To sort, click on a column header.

File Name	Category	Description	Uploaded By	Uploaded Date

[Add File](#)

**DFPS Documents**

The External Documentation Log consists of a list of documents related to this case that are available to the DFPS Case Worker.

[Generate External Documentation Log](#)

### Add a File

To add a file to the case select the Add File Button. The Upload a File page displays:

## External Documents

### Upload a File

The following document type extensions may be uploaded: .JPG, .doc, .docx, or .PDF.

File Size Limit is 25 MB.

Select a file

Select the Browse button to locate file:



Select the file and Press the Upload Button:

## External Documents

### Upload a File

The following document type extensions may be uploaded: .JPG, .doc, .docx, or .PDF.

File Size Limit is 25 MB.

Select a file

The Add File Details Page Displays:

## External Documents

### Add File Details

Required fields are identified with \* symbol.

MM/DD/YYYY

\* Date Obtained :

File Details :

\* File Type :

Enter the needed fields and Press the Save button. The file now appears on the External Documents List:

### External Documents

#### Uploaded Files

To sort, click on a column header.

File Name	Category	Description	Uploaded By	Uploaded Date
Test.docx	Birth Certificate	Test document	Frog, Tree	08/17/2016

Showing items: 1 to 1 of 1

#### Digital Photo Upload

Digital Photo uploads follow the same process, however when the Type Photograph-Digital is selected, additional fields are required:

## Case Connection User Guide

### External Documents

#### Add File Details

Required fields are identified with \* symbol.

MM/DD/YYYY \* Date Obtained: 08/01/2016

File Details: Tulips

\* File Type: Photographs - Digital

\* Budget: Home

\* Picture Type: Environment

MM/DD/YYYY \* Date Taken: 08/01/2016

Time Taken: 05:00 PM

\* First Name: Peter \* Photographer: Peter

\* Last Name: Smith

\* Detailed Description: Tulips

Image Preview: 

Cancel Save

### External Documents

#### Uploaded Files

To sort, click on a column header.

File Name	Category	Description	Uploaded By	Uploaded Date
c5ea9c139921a63a4246dfc6bc0a6aDP.jpg	Photographs - Digital	Tulips	Frog, Tree	09/07/2016
Test.docx	Birth Certificate	Test document	Frog, Tree	08/17/2016

Add File

### DFPS Documents

The External Documentation Log consists of a list of documents related to this case that are available to the DFPS Case Worker.

Generate External Documentation Log

### Additional Information:

This section displays additional documents that can be generated with External Documentation information. Available documents include:

- External Documentation Log

After launching the report, navigate to the Reports tab. To access the report click an available hyperlink such as "External Documentation Log", the system will route you to the Reports tab. You may then click on the hyperlink of the desired report you wish to view.

## Reports

To sort, click on a column header.

Child's Name	Stage ID	Description	File Name	File Status	Date Generated
James,Lebron	67194029	External Documentation	a6da1a58cfd8d1c1f83759858d8fae.pdf	COMP	08/17/2016

By selecting the hyperlink the IMPACT Report appears:

File Edit Go to Favorites Help

Protected View: This file originated from a potentially unsafe location, and most features have been disabled to avoid potential security risks.

Options

Case Name: Leonard, Kawhi  
Case #: 44260274

EXTERNAL DOCUMENTATION

DESCRIPTION	DATE OBTAINED	ITEM LOCATION	DETAILS
Birth Certificate	08/17/2016	Electronic Storage (CASA)	Test document

Printed: 08/22/16 Department of Family and Protective Services PAGE: 1

## Appendix

### Sample Case Connection Reports

The chart below displays which documents will populate in the Reports tab and the documents that will display with a new pop-up window.

Name	Pop-up Window	Reports Page
Legal Log		X
Placement Information Form	X	
Placement History Log		X
Common Application	X	
Medical/Mental Assessment Log		X
Education Log		X
Medical/Developmental History	X	
External Documentation Log		X
Child Plan	X	
Family Plan	X	
Permanency Planning Meeting (PPM) notes	X	
Visitation Plan	X	