

# Training Refresher: SANCA (ICON) Court Case Information in Legacy Trails

## Document Overview

The SANCA project release will reenable interfaces between legacy Trails and the ICON database that have remained inoperative for the past 3 years. These interfaces will make existing functionality in legacy Trails operable again.

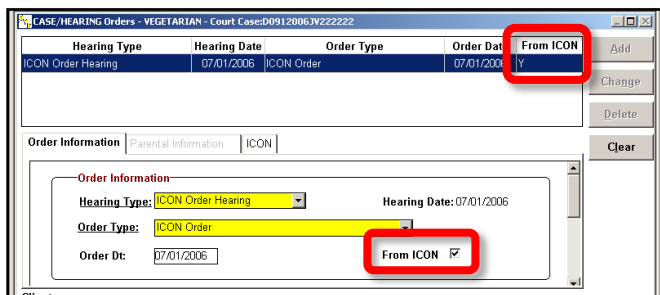
This document is intended to provide an overview of anticipated changes coming with the May release of the SANCA project. This document will:

- (1) ... highlight **functionality in legacy Trails** that will be re-enabled.
- (2) ... describe **changes in automation and manual processes**

## What's Changing?

- A system script will run to programmatically match cases in ICON with cases in Trails. This eliminates the need for caseworkers to manually and retroactively associate cases from the last 3 years.
- This same script will continue to run regularly to **automate the association of cases** going forward.
- A Crystal **report** will be available to counties to review associations made for quality assurance.
- Caseworkers manually enter court hearing information into legacy Trails currently. After this SANCA release, information in **Court Case Details will automatically pre-populate into legacy Trails**. Caseworkers only need to enter termination information.
- Other elements like fields and checkboxes within legacy Trails will start populating based on information interfaced from ICON.

### Screenshot of Court Orders within Legacy Trails



## How does the automated matching work?

Information from Trails Legacy will automatically match information with the State Judicial System.

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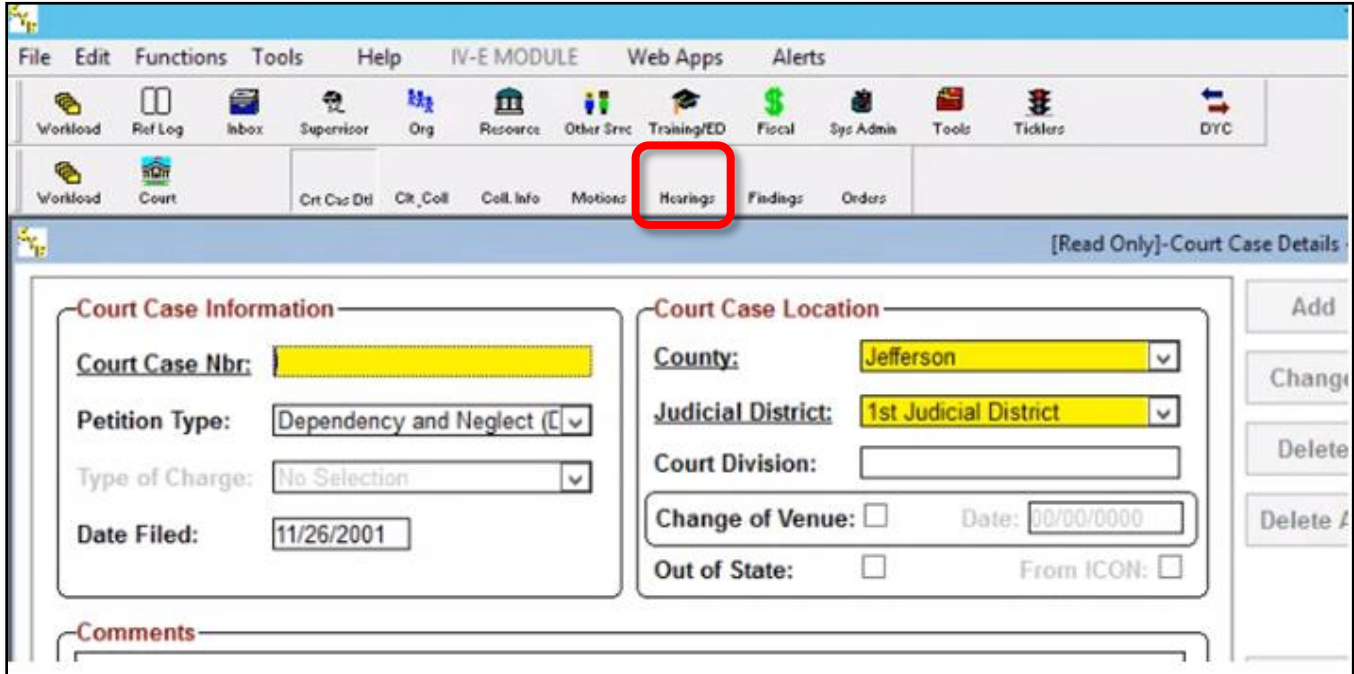
## How can I run a report on unmatched cases?

The report is located in Trails Legacy and is called Unmatched ICON Court Cases (R436).

## Process Change: Entering Termination Information

Caseworkers have been entering the court case information manually into legacy Trails, since the system interface with the ICON database to Trails became inoperable. Manually-entered information included: court case details, motions, hearings, findings.

With this SANCA release, court case details will populate into legacy Trails automatically so that a caseworker need only enter termination information by opening the court case and clicking on the [**Hearings**] button to open the **Hearings** window. From here the steps for entering Termination information remains the same.



The screenshot shows the Trails software interface. The menu bar includes File, Edit, Functions, Tools, Help, IV-E MODULE, Web Apps, and Alerts. The toolbar contains icons for Workload, Ref Log, Inbox, Supervisor, Org, Resource, Other Srec, Training/ED, Fiscal, Sys Admin, Tools, Ticklers, and DYC. Below the toolbar, there are buttons for Workload, Court, and a row of buttons: Crit Cas Dtl, Cit\_Coll, Coll\_Info, Motions, **Hearings** (highlighted with a red box), Findings, and Orders. The main window is titled "[Read Only]- Court Case Details" and contains two sections: "Court Case Information" and "Court Case Location".

**Court Case Information**

- Court Case Nbr: [Yellow highlighted text box]
- Petition Type: Dependency and Neglect (E) [Dropdown menu]
- Type of Charge: No Selection [Dropdown menu]
- Date Filed: 11/26/2001 [Text box]

**Court Case Location**

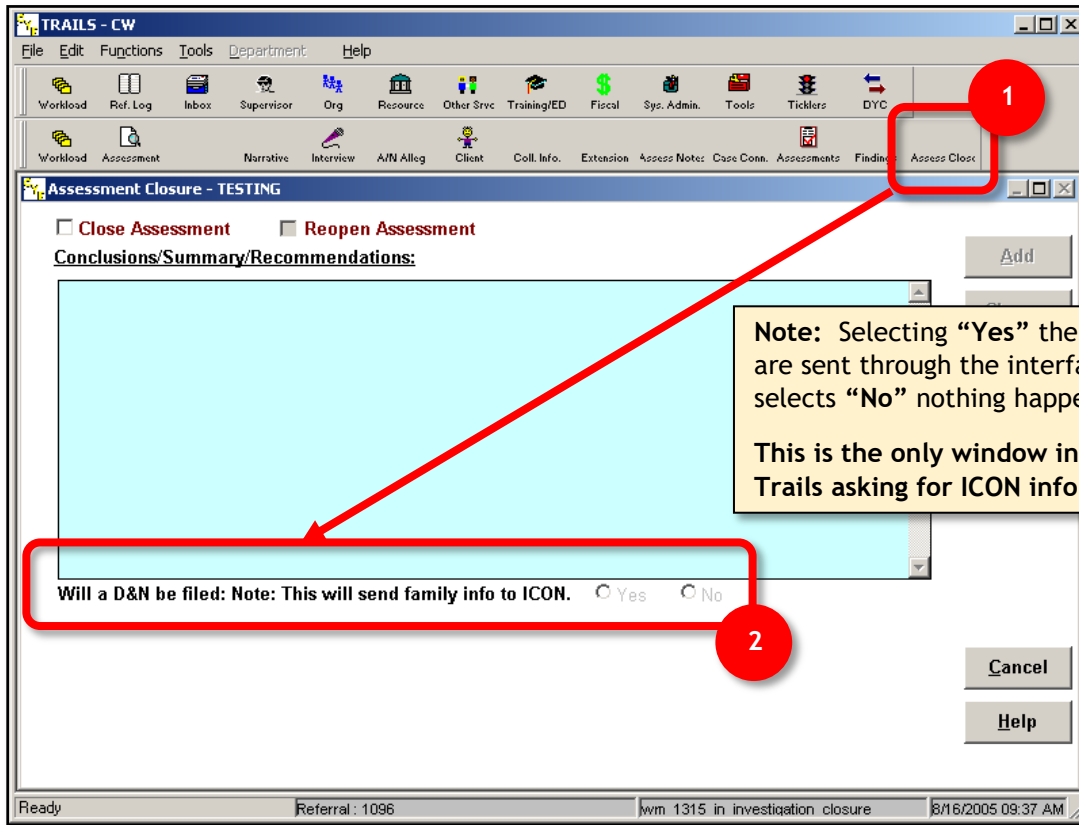
- County: Jefferson [Dropdown menu]
- Judicial District: 1st Judicial District [Dropdown menu]
- Court Division: [Text box]
- Change of Venue:  Date: 00/00/0000 [Text box]
- Out of State:  From ICON:

On the right side of the main window, there are buttons for Add, Change, Delete, and Delete A.

## Assessment Secondary Toolbar: Client/Referral Information sent to ICON

There is a mandatory [Yes/No] radio button on the Assessment Closure window, which triggers sending data to ICON.

Note: A selection must be made prior to saving any changes on this window. If the Case Connection window was not completed and approved, you will not be able to send information to ICON or save the Assessment Closure Window. Instead a warning will appear, and you will not be able to continue.

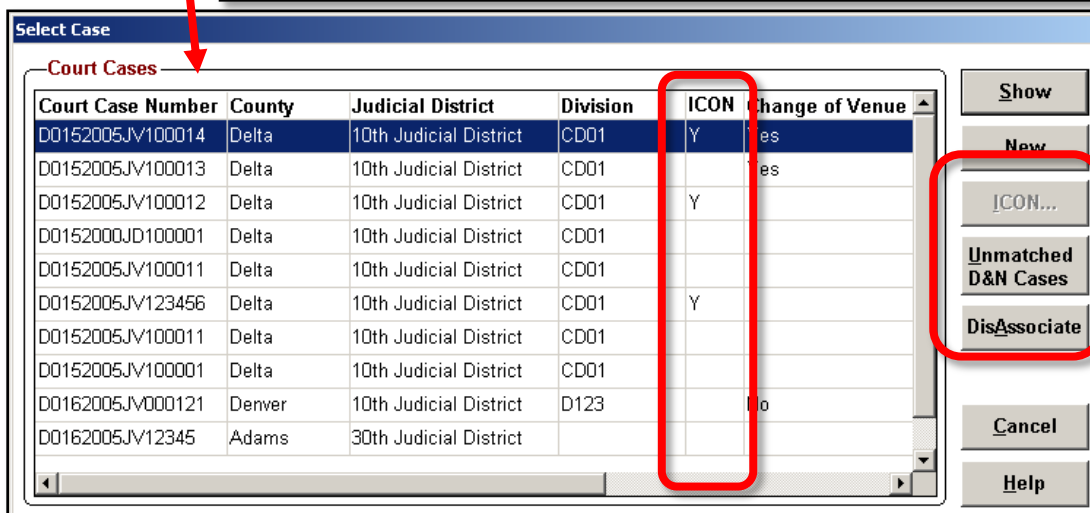


## The Court Secondary Toolbar

The Court section of Trails is where all court involvement is documented. Court cases from ICON will be populated into legacy Trails - marked by a “Y” in the [ICON] column.



**Note:** The Select Case window will display any previously entered Court filings. There are three command buttons: **ICON**, **Unmatched D&N Cases** and **DisAssociate** and an [ICON] column in this window that are related to the Trails-ICON interface.



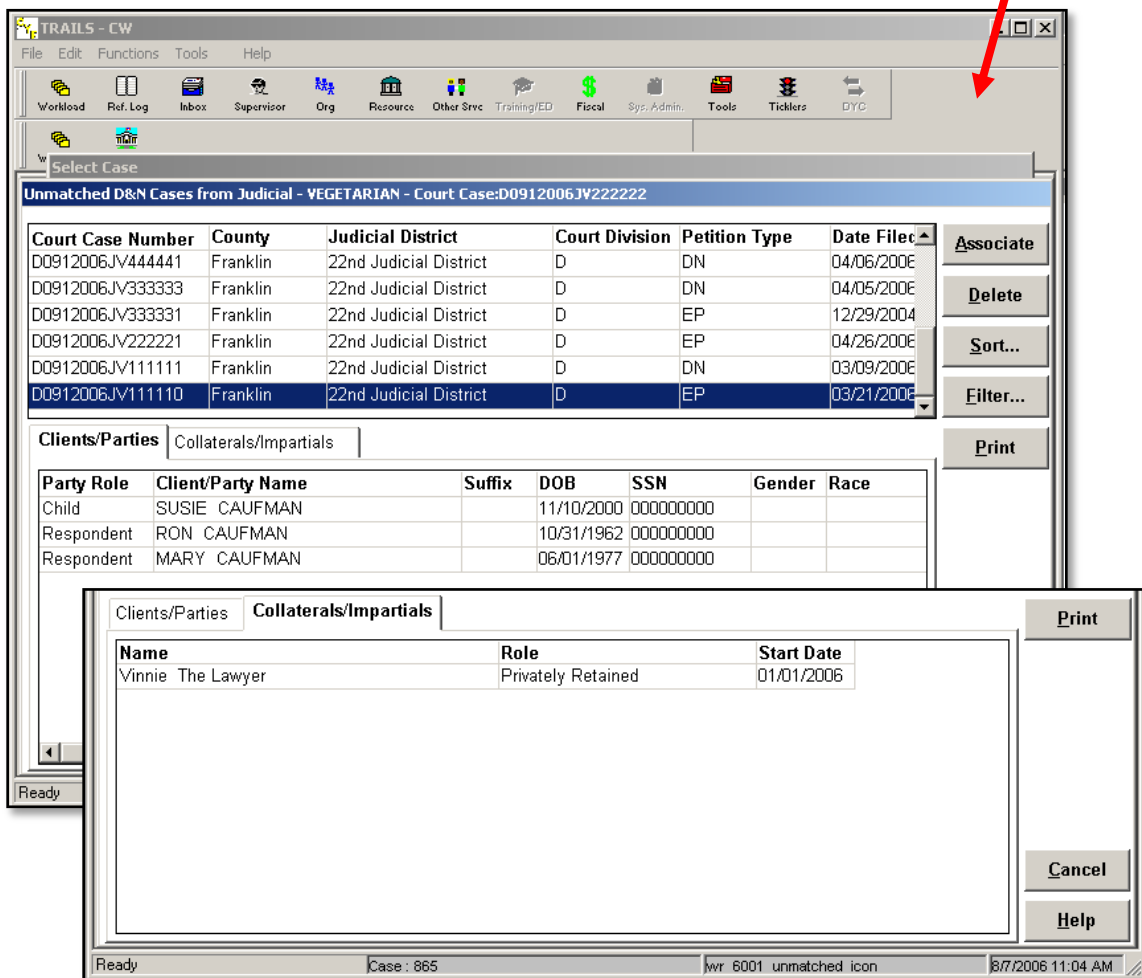
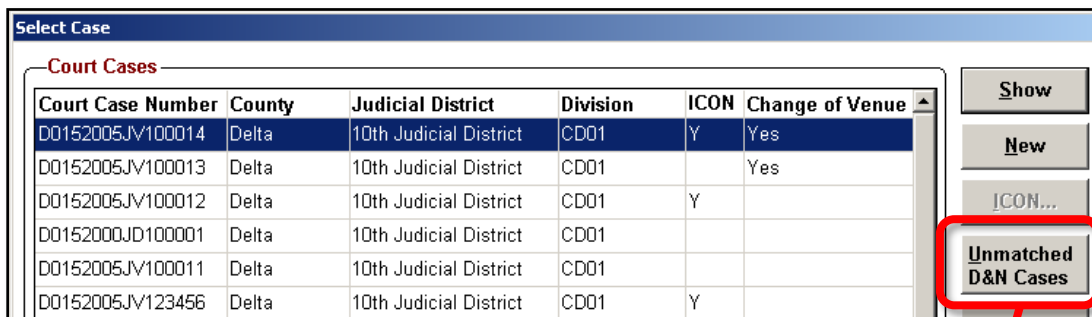
## Viewing Unmatched D&N Cases

You may still find unmatched D&N Unmatched Cases in the Queue and you have the ability to match them or delete them.

Court filings will be displayed in the [Select Case] window. If a case entered by judicial remains unmatched, click on the [Unmatched D&N Cases] button to search for clients to match.

This window serves as a staging area for unmatched records that Trails has received from ICON.

- Court Cases will Auto filter by county.
- Information about the court case will display in the grid.
- Client and collateral information will display in the respective [Clients/Parties] and [Collaterals/Impartials] tabs corresponding to the selected case.



Use the [Clients/Parties] and [Collaterals/Impartials] tabs to verify client associations.

The [Clients/Parties] tab will display:

- date of birth (DOB)
- social security number (SSN)
- gender
- race

The [Collaterals/Impartials] tab will display:

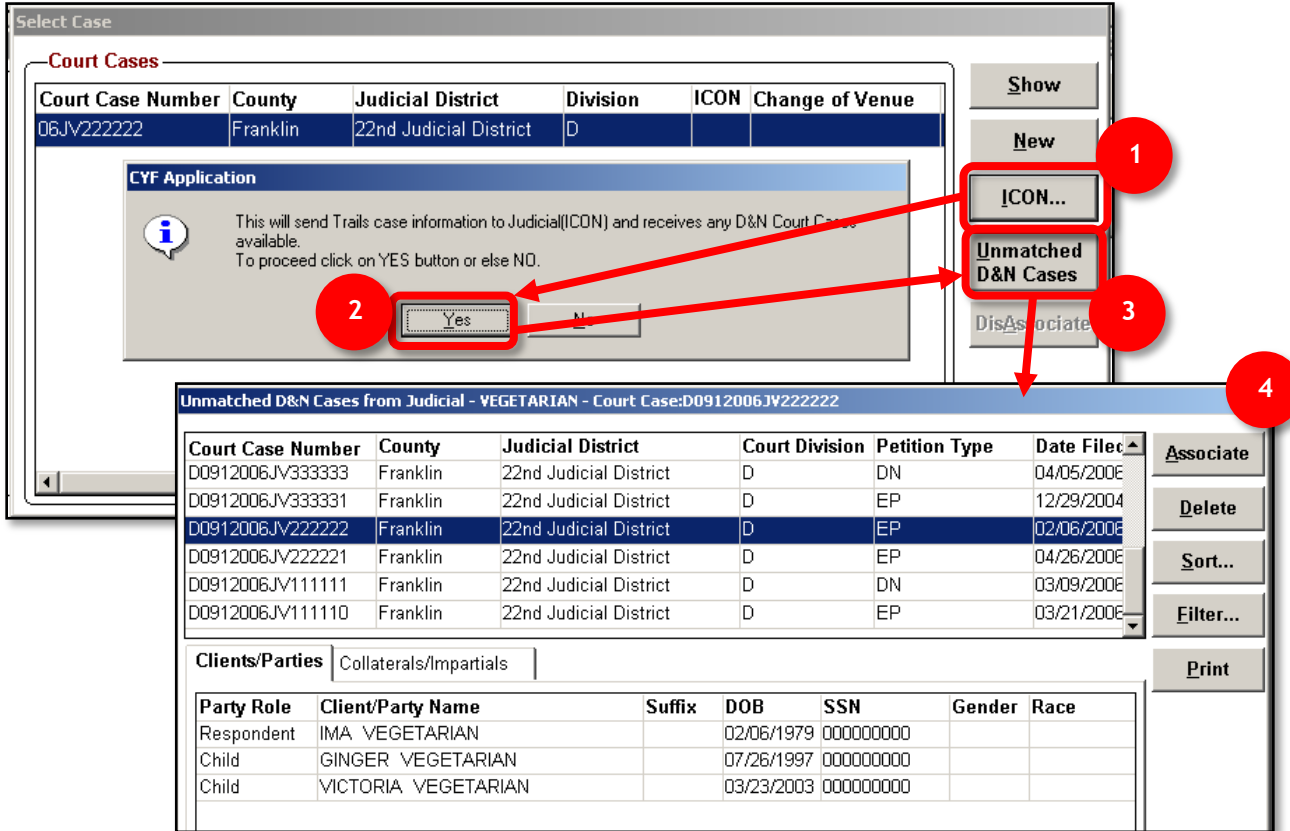
- names
- roles
- start dates.

## ICON Button: Client/Referral Information sent to ICON

If the clients from a court case are not listed in the [*Unmatched D&N Cases*] window, it is likely that judicial has yet to record the D&N. In that case click on the ICON command button first.

Note: This functions the say way as selecting the [**Yes**] radio button from the Assessment Closure window.

1. Click the [**ICON...**] button.
2. Select “Yes” to send Trails information to Judicial.
3. Then go back and click on the [*Unmatched D&N Cases*] to associate clients.



**Select Case**

**Court Cases**

Court Case Number	County	Judicial District	Division	ICON	Change of Venue
06JV222222	Franklin	22nd Judicial District	D		

**CYF Application**

This will send Trails case information to Judicial(ICON) and receives any D&N Court Cases available.  
To proceed click on YES button or else NO.

**Unmatched D&N Cases from Judicial - VEGETARIAN - Court Case:D0912006JV222222**

Court Case Number	County	Judicial District	Court Division	Petition Type	Date Filed	Associate
D0912006JV333333	Franklin	22nd Judicial District	D	DN	04/05/200E	
D0912006JV333331	Franklin	22nd Judicial District	D	EP	12/29/2004	
D0912006JV222222	Franklin	22nd Judicial District	D	EP	02/06/200E	
D0912006JV222221	Franklin	22nd Judicial District	D	EP	04/26/200E	
D0912006JV111111	Franklin	22nd Judicial District	D	DN	03/09/200E	
D0912006JV111110	Franklin	22nd Judicial District	D	EP	03/21/200E	

**Clients/Parties** Collaterals/Impartials

Party Role	Client/Party Name	Suffix	DOB	SSN	Gender	Race
Respondent	IMA VEGETARIAN		02/06/1979	000000000		
Child	GINGER VEGETARIAN		07/26/1997	000000000		
Child	VICTORIA VEGETARIAN		03/23/2003	000000000		

## Manually Associating Trails Clients to ICON Parties

Once you have verified the clients, click on the Association button. This will bring you to the [*Associate Clients to Parties*] window. This is where you can connect clients from the Trails case to the clients from the ICON case.

Use this window to associate a client/party referenced in the ICON court case with the corresponding client record in Trails.

1. Click on the [**Associate Trails Client**] drop down
  2. Select the correct Trails client to the ICON party
  3. Click the Associate Command button
- The Value "Unknown" will always be an option in the Associate Trails Client pick list for clients that cannot be associated at that time. This may occur if there is a judicial client but no corresponding Trails client.
  - Remember, names may be entered differently.
    - For example Victoria might be the name entered as the ICON name whereas Vicky may show as the Associates Trails Client.
    - Use common sense when making the selection and utilize the tabs in this window to verify.

**Associate Clients to Parties**

**Associate Clients**

Please associate the ICON client/party to the appropriate Trails Clients

**Associate**

Client/Party Name	Associate Trails Client
IMA VEGETARIAN	[Dropdown Menu]
GINGER VEGETARIAN	GINGER VEGETARIAN 917
VICTORIA VEGETARIAN	IMA VEGETARIAN 1828
	VICKY VEGETARIAN 918
	Unknown 0

Client/Party Info | Client/Party Addresses | Client/Party Phone Numbers

Party Role	Client/Party Name	Suffix	DOB	SSN	Gen
Respondent	IMA VEGETARIAN		02/06/1979	000000000	

## Unmatching Clients / Dis-Associating Cases

If a Trails case and ICON case have been incorrectly or mistakenly associated, you may disassociate the cases.

1. You must first un-match parties/clients.
2. Select the correct case from the *Court Cases* grid.
3. Then click the [**DisAssociate**] button to unlink the ICON client/party and Trails client records.
4. Click on the [**DisAssociate**] button.
5. Click on the [Yes] button when prompted to confirm with disassociating the records.

The client/party names will reappear again in the *Unmatched D&N Cases* window, from which you can make any manual re-associations.

Select Case

**Court Cases**

Court Case Number	County	Judicial District	Division	ICON	Change of Venue
D0912006JV222222	Franklin	22nd Judicial District	D	Y	
06JV22222					

**DisAssociate**

**DisAssociate**

This will disassociate Judicial(ICON) court case info from Trails case. To proceed click on YES button or else NO.

Yes No

Show

New

ICON...

Unmatched D&N Cases

Cancel

Help



## Legacy Trails Windows with ICON-related Elements

This next section summarizes all of the windows in legacy Trails that will start reflecting information from ICON automatically updated by system interfaces.

These windows include:

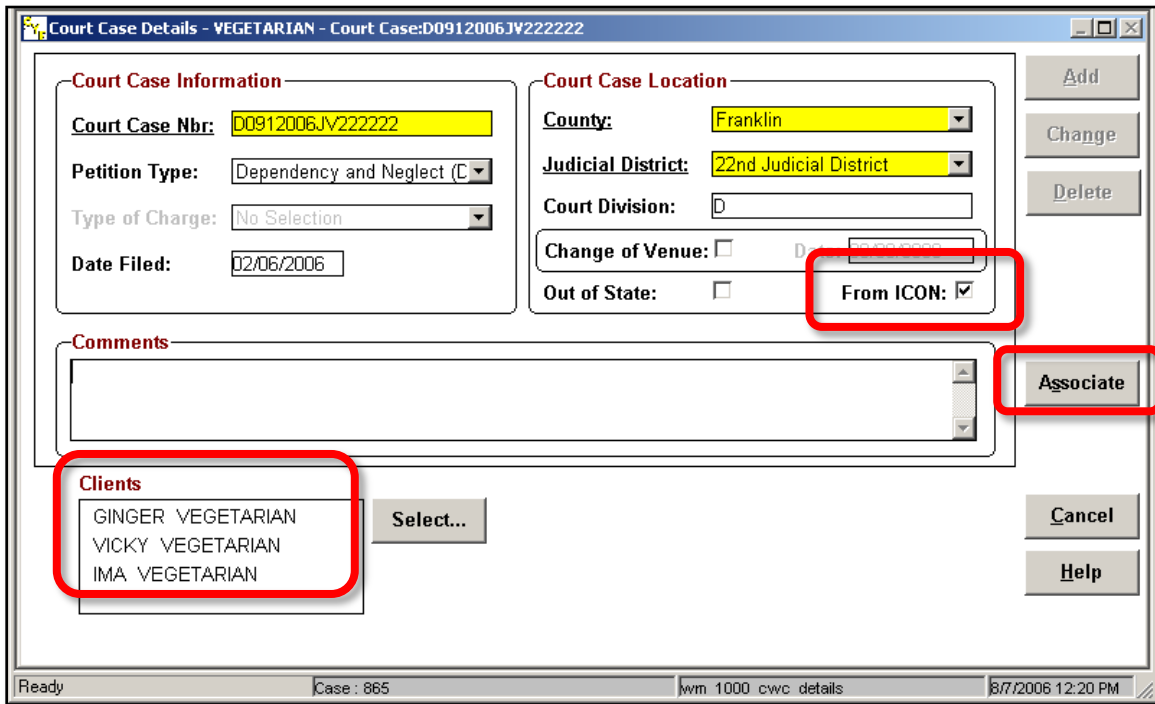
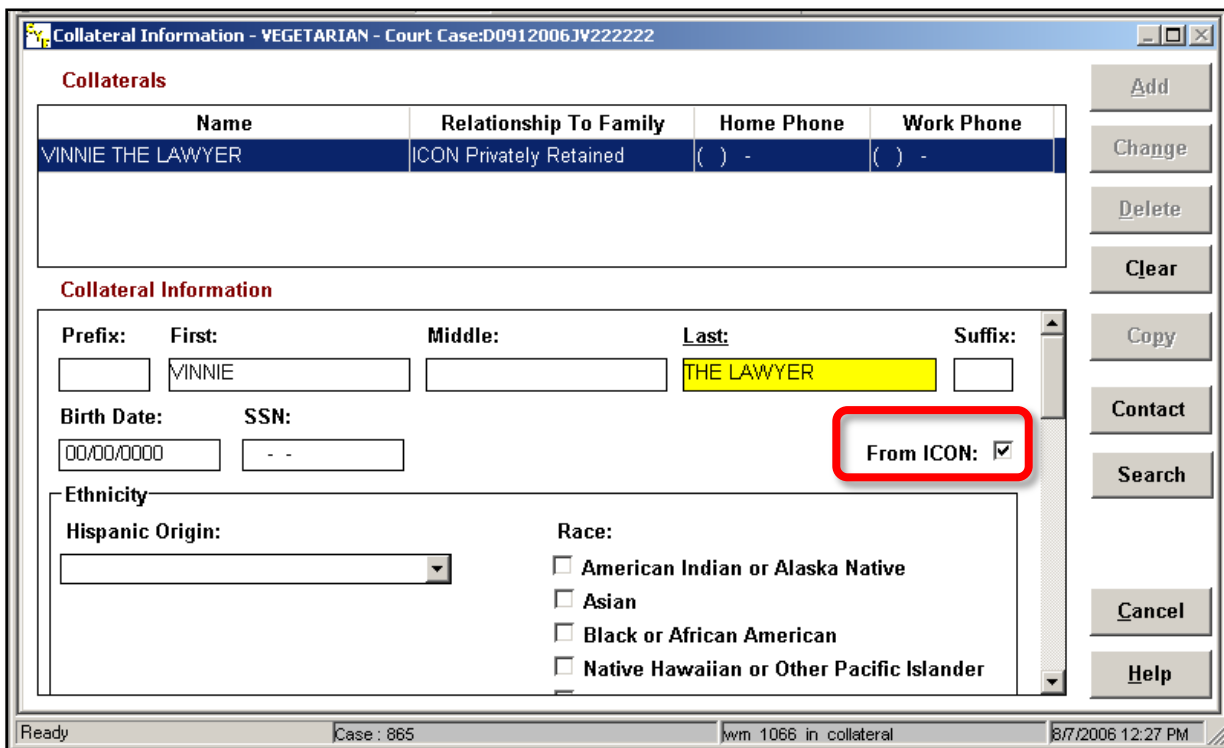
- [Court Case Details](#)
- [Clients/Collaterals](#)
- [Motions](#)
- [Hearings](#)
- [Orders](#)

All of these Trails windows display a **[From ICON]** check box that is systematically checked when a record is brought over through the Trails-ICON system interface. Trails users cannot edit this checkbox.

**From ICON:**

### Court Case Details Window

- **[Associate]** Button: Clicking on the Associate command button brings up the Associate Clients and Parties window. This is to allow users another opportunity to associate the Trails clients to the ICON clients. Users have another chance to associate clients that were once thought to be unknown.

Name	Relationship To Family	Home Phone	Work Phone
VINNIE THE LAWYER	ICON Privately Retained	( ) -	( ) -



**Motions Window**

Motion Date	Motion Type
06/01/2006	ICON Motion

Add  
 Change  
 Delete  
 Clear

**Motion Date:** 06/01/2006    **Motion Type:** ICON Motion    **From ICON:**

**Comments:** TO APPROVE RECOMMENDATIONS. /CYT

**Hearings Window**

Scheduled Date	Hearing Type	Hearing Status	Hearing Held Date	From ICON
07/01/2006	ICON Order Hearing	Held	07/01/2006	Y

Add  
 Change  
 Delete  
 Clear

**Scheduled Date:** 07/01/2006    **Hearing Status:** Held    **From ICON:**

**Hearing Type:** ICON Order Hearing    **Held Date:** 07/01/2006

Findings...  
 Orders...

**Orders Window - Order Information Tab**

Hearing Type	Hearing Date	Order Type	Order Date	From ICON
ICON Order Hearing	07/01/2006	ICON Order	07/01/2006	Y

Add  
 Change  
 Delete  
 Clear

Order Information    Parental Information    **ICON**

**Order Information**  
**Hearing Type:** ICON Order Hearing    **Hearing Date:** 07/01/2006  
**Order Type:** **ICON Order**  
**Order Dt:** 07/01/2006    **From ICON:**

**Orders Window - ICON Tab**

Hearing Type	Hearing Date	Order Type	Order Date	From ICON
ICON Order Hearing	07/01/2006	ICON Order	07/01/2006	Y

Add  
 Change  
 Delete  
 Clear

Order Information    Parental Information    **ICON**

**Order Type:** ICON Order    **Order Date:** 07/01/2006  
**Appeal Status:**    **Status Date:** 00/00/0000  
**Comments:** CSM--PERMANENCY REVIEW ORDER. THE COURT FINDS THAT REASONABLE EFFORTS HAVE BEEN MADE TO FINALIZE THE PERMANENCY PLAN FOR VICTORIA OF OTHER PLANNED PERMANENT LIVING ARRANGEMENT THROUGH NON-RELATIVE FOSTER CARE.

**Clients:**  
 IMA VEGETARIAN    **Select...**

Cancel  
 Help

Ready    Case: 865    lwm 1003 cwc orders    8/7/2006 12:42 PM