

Finding Client/Assessment/Case Information in Trails Mod - Trails Oracle Upgrade

The Trails Oracle Upgrade will occur on the weekend of April 10-11, 2021. In order to implement the necessary system changes, both legacy and modernized Trails will be unavailable from 6:00 a.m. Saturday morning to 6:00 p.m. Sunday evening.

The following TEST environments will be available while Trails Production is offline for the Oracle Upgrade:

ALL USERS will have access to a copy of Trails Modernization.

- a. This environment is for research purposes only. **DO NOT enter or change any data.**
- b. Website: <https://trails-orcl.state.co.us>
- c. Username/Password: same as your usual Trails Modernization login
- d. See next page for more details of how to find information.
- e. The data in this version of Trails will be a snapshot of production data as of Thursday, April 8th at 8:00 p.m.

Trails Modernization has what Child Welfare needs during the outage*:

[Client Search](#)

[Referral/Assessment History](#)

[Case History](#)


[Placement History](#)

[Critical Information](#)

Client Search


[Click Here for the full Client Search Tip Sheet](#)

Workspace Menu <

- Home
- Search
 - Client Search 
 - Employee Search
 - Provider Search
 - Hotline Search
 - Incident Search
- Queues
- Resource Queues
- System Admin
- Staffing - County
- Organization - County
- Staffing - State
- Organization - State
- IV-E Foster Care
- IV-E Adoption
- IV-E RGAP
- MOE
- Reports

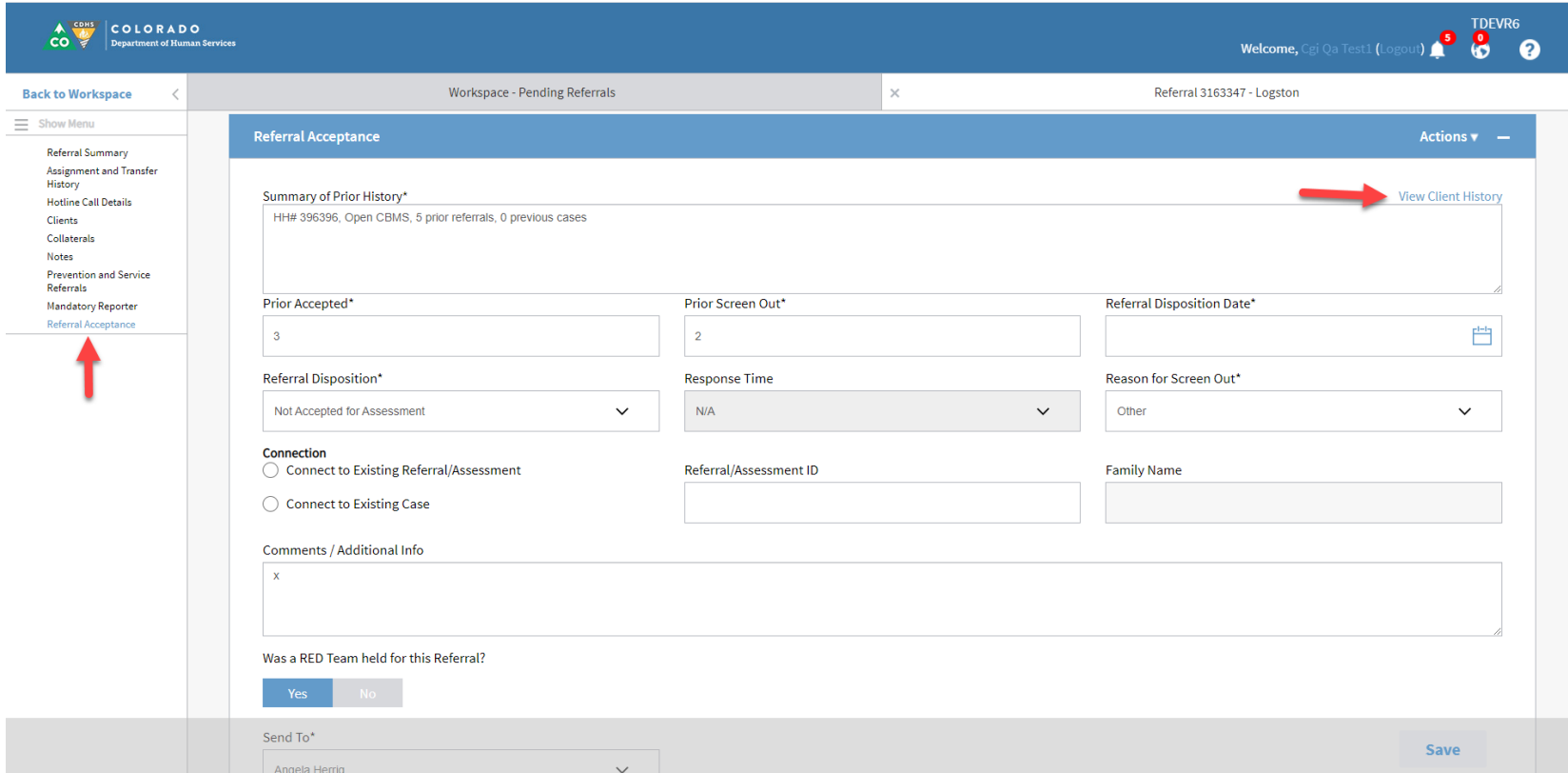
Client Search

Search Queries

First Name Jane	Middle Name Jane	Last Name Smith	Soundex <input type="button" value="On"/> <input checked="" type="button" value="Off"/>
Date of Birth MM/DD/YYYY 	Phone Number 555-555-5555	Client ID 0000000	
Address 123 Elm St	City Denver	ZIP 80132	
State ID AS55555	Household Number 0000000	Social Security Number 000-00-0000 or 0000	

Referral/Assessment History (Two Options):

- 1) Access a referral record by performing a Hotline Search for a Referral ID or accessing the Pending Referral Queue for your county
- 2) Within the referral record, navigate to the Referral Acceptance Panel
- 3) Click the 'View Client History' hyperlink in the upper-right corner of the screen



Referral Acceptance Actions ▾

Summary of Prior History*
HH# 396396, Open CBMS, 5 prior referrals, 0 previous cases [View Client History](#)

Prior Accepted* 3	Prior Screen Out* 2	Referral Disposition Date* <input type="text"/>
Referral Disposition* Not Accepted for Assessment ▾	Response Time N/A ▾	Reason for Screen Out* Other ▾

Connection
 Connect to Existing Referral/Assessment
 Connect to Existing Case

Referral/Assessment ID

Family Name

Comments / Additional Info
x

Was a RED Team held for this Referral?

Send To*
Angela Herria ▾

- 1) Click 'Show Filter Options' to expand filter options for referral history
- 2) Users can select clients/adults and filter to in/exclude IARTs, history
- 3) Users can expand any referral row to see more specific information of all individuals involved in the referral

Referral History



Clients:

Please select one or more... 0 ▼

Adult History:

Include all History ▼

Exclude inst. A/N Referrals

Yes No

Only Show Hist. Prior to Referral

Yes No

Show Only Inst. A/N Referrals

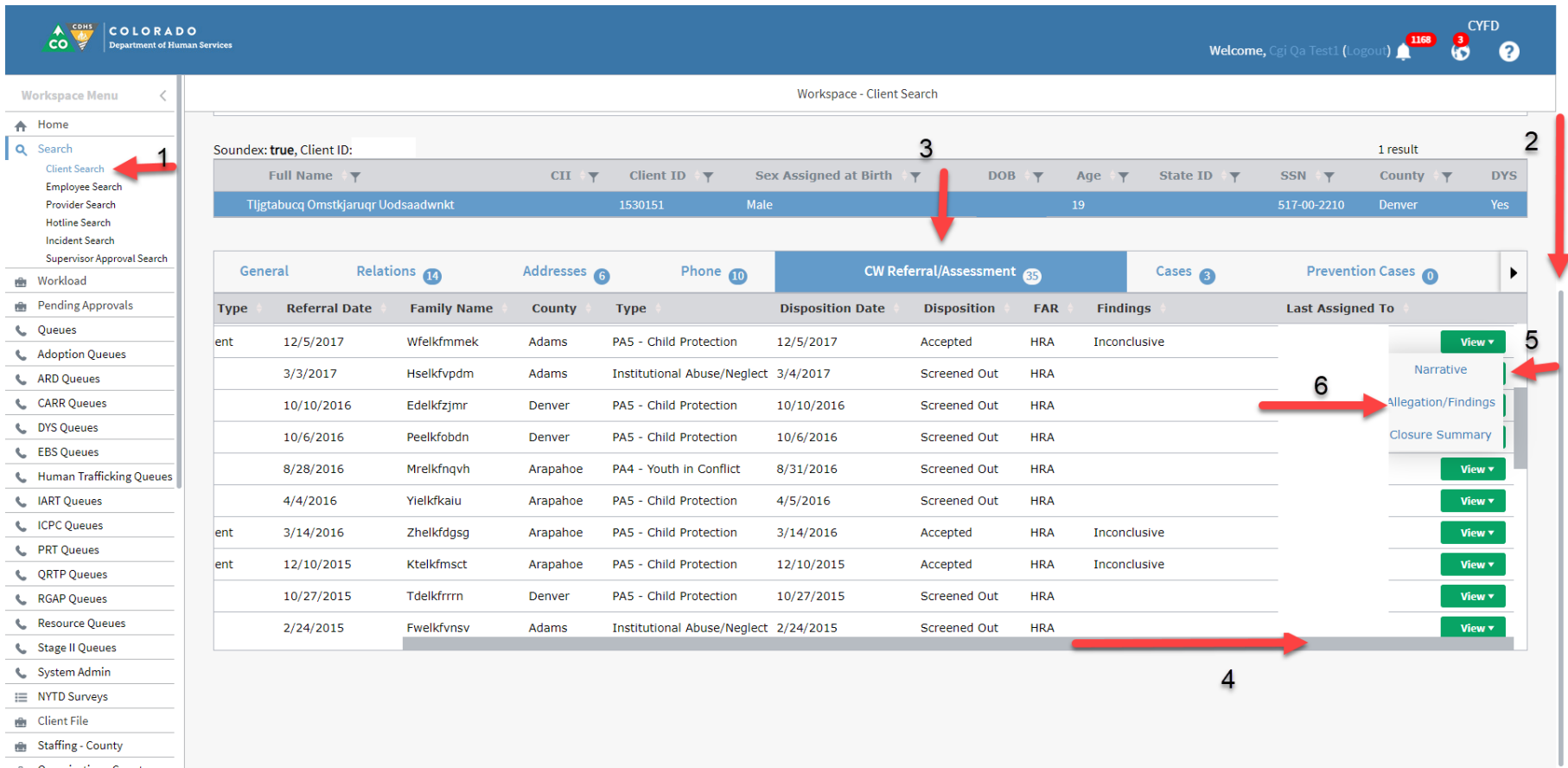
Yes No

Hide Filter Options

Records 44 Screen in 19 Screen out 24

>	Referral ID	Date	Family Name	Resp. County	Type	Dispos. Date	Accepted	FAR	Last Assigned	Case ID	
>	1861174	12/11/2006	Vpelkfahbz	Jefferson	PA5CP	12/11/2006	Yes	No			View ▼
>	1877595	3/9/2007	Mjelkfqasz	Jefferson	PA5CP	3/9/2007	Yes	No			View ▼
>	1883561	4/9/2007	Ekelkfvmhf	Jefferson	PA5CP	4/9/2007	Yes	No			View ▼
>	1891066	5/10/2007	Lpelkffmyv	Adams	PA5CP	5/10/2007	Yes	No			View ▼
>	1920509	9/25/2007	Iwelkfxgzz	Jefferson	PA5CP	9/25/2007	Yes	No			View ▼
>	2016729	12/22/2008	Fbelkfwcqe	Jefferson	PA5CP	12/23/2008	Yes	No			View ▼
>	2023493	1/28/2009	Ylelkfrklv	Jefferson	PA5CP	1/28/2009	Yes	No			View ▼
>	2031597	3/4/2009	Kdelkfhwsp	Jefferson	PA5CP	3/4/2009	No	No			View ▼
>	2050603	5/27/2009	Edelkfjhxy	Jefferson	PA5CP	5/27/2009	No	No			View ▼

- 1) Perform a client search
- 2) Use the vertical navigation bar to scroll to the bottom of the page and select the desired client
- 3) Click on 'CW Referrals/Assessment'
- 4) Use the horizontal scroll bar to scroll to the right of the selection panel
- 5) Click the green 'View' button
- 6) Select 'Allegations/Findings' for a selected referral within the panel



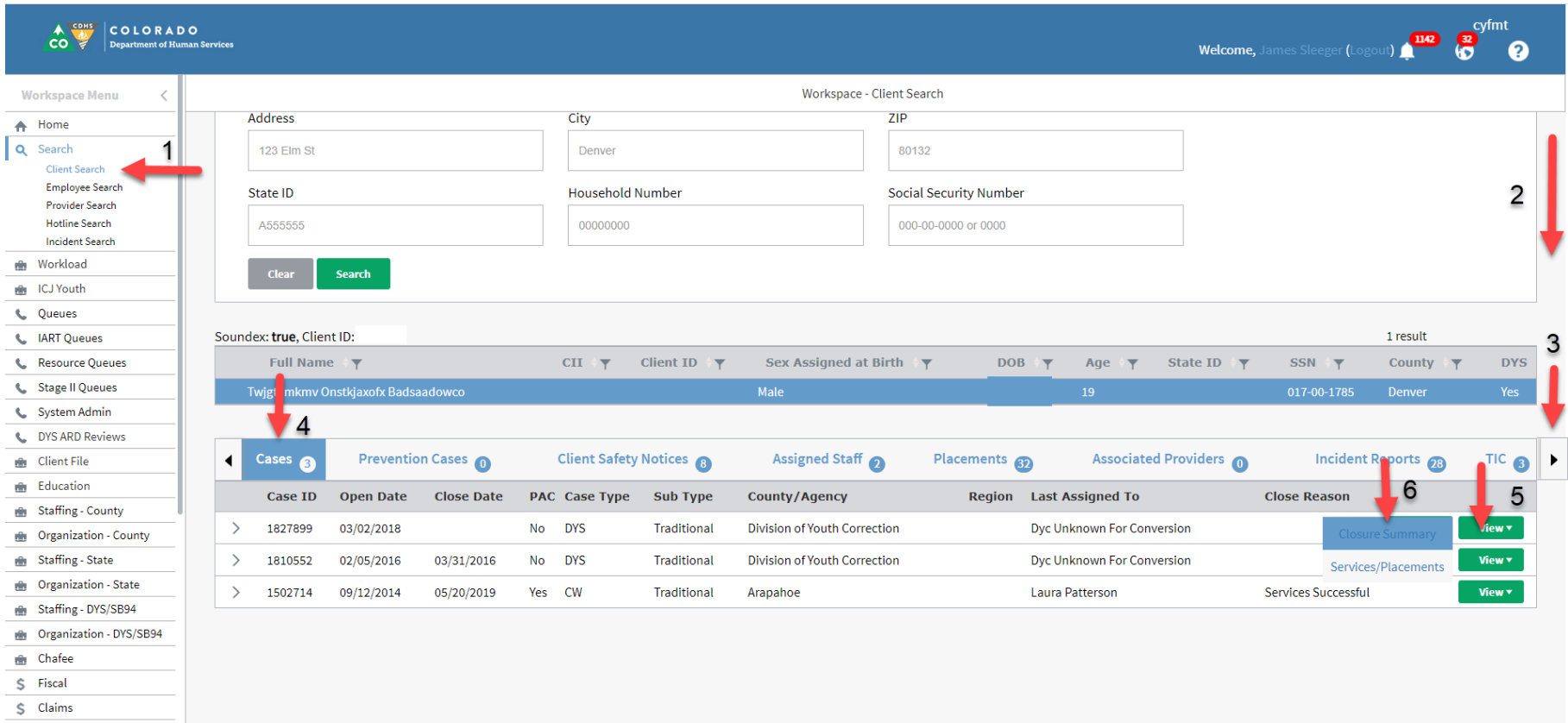
The screenshot shows the 'Workspace - Client Search' interface. A search bar at the top contains 'Soundex: true, Client ID:'. Below it is a table with columns: Full Name, CII, Client ID, Sex Assigned at Birth, DOB, Age, State ID, SSN, County, and DYS. The first row is highlighted in blue. Below this is a tabbed interface with tabs for General, Relations (14), Addresses (6), Phone (10), CW Referral/Assessment (35), Cases (3), and Prevention Cases (0). The 'CW Referral/Assessment' tab is active, showing a table with columns: Type, Referral Date, Family Name, County, Type, Disposition Date, Disposition, FAR, Findings, and Last Assigned To. The first row is highlighted. To the right of the table is a vertical panel with a scroll bar. The panel contains a 'View' button, 'Narrative', 'Allegation/Findings', and 'Closure Summary'. Below these are several more 'View' buttons. A horizontal scroll bar is located at the bottom of the panel.

Numbered red arrows indicate the following steps:

- 1: Click on 'Search' in the Workspace Menu.
- 2: Scroll down the vertical navigation bar to the bottom.
- 3: Click on the 'CW Referral/Assessment' tab.
- 4: Use the horizontal scroll bar to scroll to the right of the selection panel.
- 5: Click the green 'View' button.
- 6: Select 'Allegation/Findings' for a selected referral within the panel.

Case History

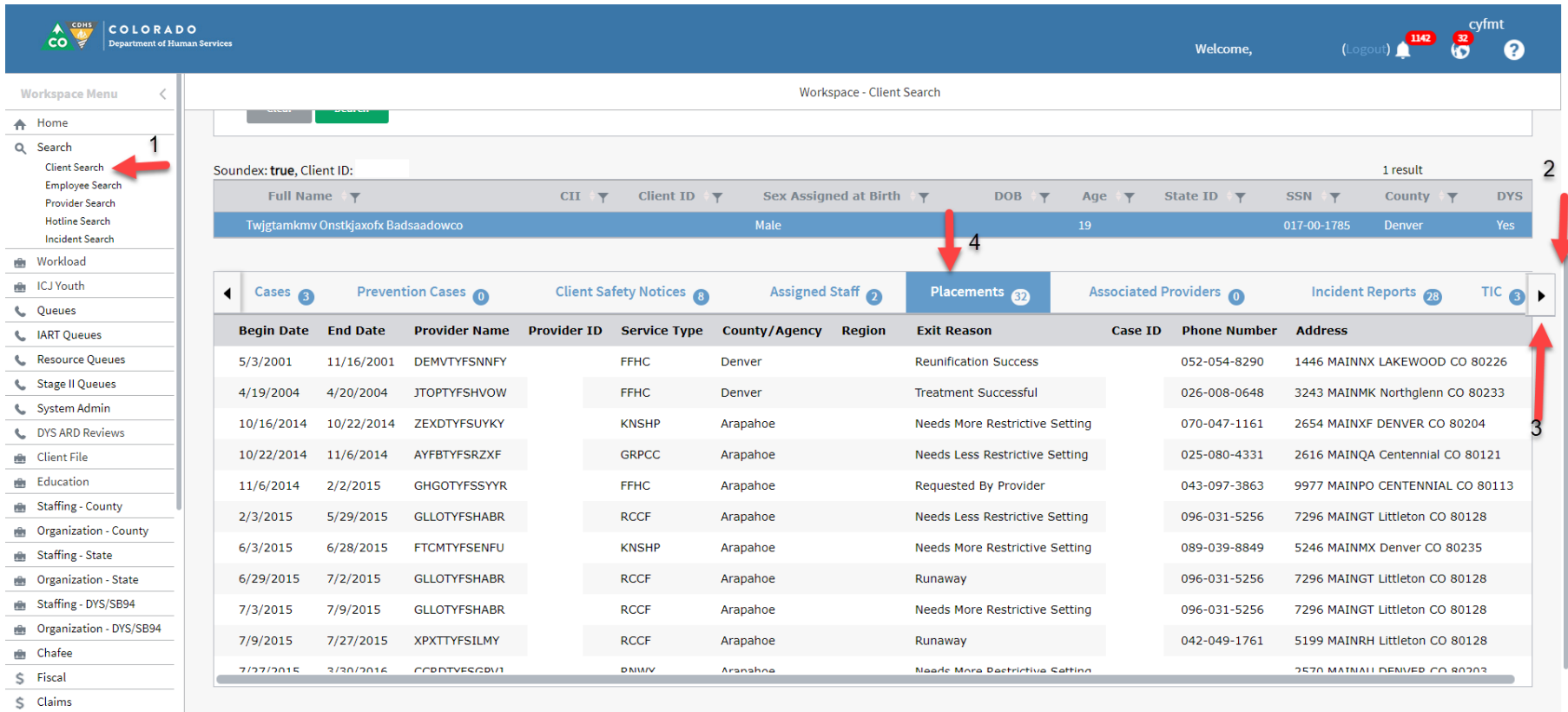
- 1) Perform a client search
- 2) Use the vertical navigation bar to scroll to the bottom of the page and select the desired client
- 3) Click on the right-arrow to view the additional tabbed selections
- 4) Click on 'Cases'
- 5) Click the green 'View' button
- 6) Click on 'Closure Summary' to view the closure summary of a specific case



The screenshot shows the 'Workspace - Client Search' interface. On the left is a 'Workspace Menu' with a search icon and a list of options including 'Client Search', 'Employee Search', 'Provider Search', 'Hotline Search', and 'Incident Search'. A red arrow labeled '1' points to the search icon. The main search area contains fields for Address (123 Elm St), City (Denver), ZIP (80132), State ID (A555555), Household Number (00000000), and Social Security Number (000-00-0000 or 0000). A red arrow labeled '2' points to the search results area. Below the search fields is a table with one result for 'Twjg mkmv Onstkjxoxfx Badsaadowco'. A red arrow labeled '3' points to the table header. Below the table is a tabbed interface with tabs for 'Cases' (3), 'Prevention Cases' (0), 'Client Safety Notices' (8), 'Assigned Staff' (2), 'Placements' (32), 'Associated Providers' (0), 'Incident Reports' (28), and 'TIC' (3). A red arrow labeled '4' points to the 'Cases' tab. Below the tabs is a table of cases with columns for Case ID, Open Date, Close Date, PAC, Case Type, Sub Type, County/Agency, Region, Last Assigned To, and Close Reason. A red arrow labeled '5' points to a 'View' button for the first case (Case ID 1827899). A red arrow labeled '6' points to the 'Closure Summary' link for the same case.

Placement History

- 1) Perform a client search
- 2) Use the vertical navigation bar to scroll to the bottom of the page and select the desired client
- 3) Click on the right-arrow to view the additional tabbed selections
- 4) Click on 'Placements'

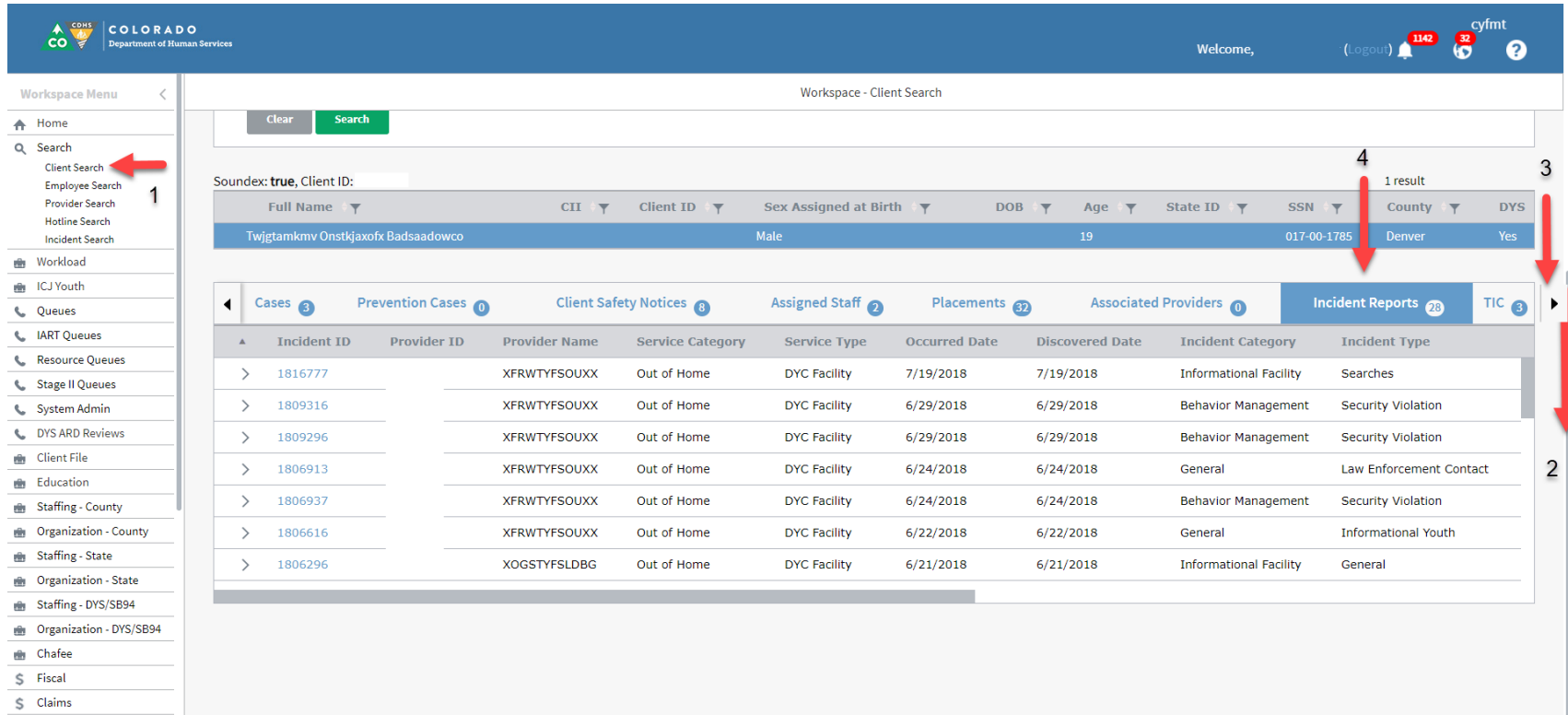


The screenshot shows the 'Workspace - Client Search' interface. The search results for 'Soundex: true, Client ID: [redacted]' show one result: Twjgtamkv Onstkjaxofx Badsaadowco, Male, DOB 19, SSN 017-00-1785, Denver, DYS Yes. Below the client details is a tabbed navigation bar with tabs for Cases (3), Prevention Cases (0), Client Safety Notices (8), Assigned Staff (2), Placements (32), Associated Providers (0), Incident Reports (28), and TIC (3). The 'Placements' tab is selected, displaying a table of placement history.

Begin Date	End Date	Provider Name	Provider ID	Service Type	County/Agency	Region	Exit Reason	Case ID	Phone Number	Address
5/3/2001	11/16/2001	DEMVTFYFSNNFY		FFHC	Denver		Reunification Success		052-054-8290	1446 MAINNX LAKEWOOD CO 80226
4/19/2004	4/20/2004	JTOPTYFSHVOW		FFHC	Denver		Treatment Successful		026-008-0648	3243 MAINMK Northglenn CO 80233
10/16/2014	10/22/2014	ZEXDTYFSUYKY		KNSHP	Arapahoe		Needs More Restrictive Setting		070-047-1161	2654 MAINXF DENVER CO 80204
10/22/2014	11/6/2014	AYFBTYFSRZXF		GRPCC	Arapahoe		Needs Less Restrictive Setting		025-080-4331	2616 MAINQA Centennial CO 80121
11/6/2014	2/2/2015	GHGOTYFSSYYR		FFHC	Arapahoe		Requested By Provider		043-097-3863	9977 MAINPO CENTENNIAL CO 80113
2/3/2015	5/29/2015	GLLOTYFSHABR		RCCF	Arapahoe		Needs Less Restrictive Setting		096-031-5256	7296 MAINGT Littleton CO 80128
6/3/2015	6/28/2015	FTCMTYFSENFU		KNSHP	Arapahoe		Needs More Restrictive Setting		089-039-8849	5246 MAINMX Denver CO 80235
6/29/2015	7/2/2015	GLLOTYFSHABR		RCCF	Arapahoe		Runaway		096-031-5256	7296 MAINGT Littleton CO 80128
7/3/2015	7/9/2015	GLLOTYFSHABR		RCCF	Arapahoe		Needs More Restrictive Setting		096-031-5256	7296 MAINGT Littleton CO 80128
7/9/2015	7/27/2015	XPXTTYFSILMY		RCCF	Arapahoe		Runaway		042-049-1761	5199 MAINRH Littleton CO 80128
7/27/2015	3/30/2016	CCPDYFSGBY		DNWV	Arapahoe		Needs More Restrictive Setting		7570 MAINH DENVER CO 80203	

Critical Information

- 1) Perform a client search
- 2) Use the vertical navigation bar to scroll to the bottom of the page and select the desired client
- 3) Click on the right-arrow to view the additional tabbed selections
- 4) Click on 'Incident Reports'



The screenshot shows the 'Workspace - Client Search' interface. On the left is a 'Workspace Menu' with a search icon and a red arrow pointing to 'Client Search' (labeled '1'). The main area has a search bar with 'Soundex: true, Client ID:' and a 'Search' button. Below the search bar is a table with one result for 'Twjgtamkmv Onstkjxofx Badsaadowco'. To the right of the search bar is a red arrow pointing to the search results area (labeled '4'). Below the search bar is a tabbed interface with tabs for 'Cases', 'Prevention Cases', 'Client Safety Notices', 'Assigned Staff', 'Placements', 'Associated Providers', 'Incident Reports', and 'TIC'. A red arrow points to the 'Incident Reports' tab (labeled '3'). Below the tabs is a table of incident reports with columns for Incident ID, Provider ID, Provider Name, Service Category, Service Type, Occurred Date, Discovered Date, Incident Category, and Incident Type. A red arrow points to the bottom of the page (labeled '2').

Full Name	CII	Client ID	Sex Assigned at Birth	DOB	Age	State ID	SSN	County	DYS
Twjgtamkmv Onstkjxofx Badsaadowco			Male		19		017-00-1785	Denver	Yes

Incident ID	Provider ID	Provider Name	Service Category	Service Type	Occurred Date	Discovered Date	Incident Category	Incident Type
> 1816777	XFRWTFYSOUXX	XFRWTFYSOUXX	Out of Home	DYC Facility	7/19/2018	7/19/2018	Informational Facility	Searches
> 1809316	XFRWTFYSOUXX	XFRWTFYSOUXX	Out of Home	DYC Facility	6/29/2018	6/29/2018	Behavior Management	Security Violation
> 1809296	XFRWTFYSOUXX	XFRWTFYSOUXX	Out of Home	DYC Facility	6/29/2018	6/29/2018	Behavior Management	Security Violation
> 1806913	XFRWTFYSOUXX	XFRWTFYSOUXX	Out of Home	DYC Facility	6/24/2018	6/24/2018	General	Law Enforcement Contact
> 1806937	XFRWTFYSOUXX	XFRWTFYSOUXX	Out of Home	DYC Facility	6/24/2018	6/24/2018	Behavior Management	Security Violation
> 1806616	XFRWTFYSOUXX	XFRWTFYSOUXX	Out of Home	DYC Facility	6/22/2018	6/22/2018	General	Informational Youth
> 1806296	XOGSTYFSLDBG	XOGSTYFSLDBG	Out of Home	DYC Facility	6/21/2018	6/21/2018	Informational Facility	General