***Create New Case(s)***

NCAtrak On-line Help

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      **Overview of the Create New Case(s) Feature in NCAtrak**

Create New Case(s) is a feature in NCAtrak that is designed to guide you through the process of setting up case records in NCAtrak. The feature gives you a place to enter what you know about a case when it is referred to your CAC, but it does more than just record intake information. As you are entering information about the allegation of abuse and people associated with the case you will really be working toward two objectives:

      Establishing a new Case Record for each Alleged Victim/Client –From Create New Case(s) you can create one case or multiple case records at the same time; one for each of the co-victims associated with the allegations.

      Creating or updating ‘Biography’ for each person on the case(s) you enter –Each person associated with a case record in NCAtrak has a biographical record in the database that contains personal information and a list of cases they are associated with that are recorded in NCAtrak. The first time a person is entered into a case record the biography is automatically created. By using the Person Loop-up table, you will be able to find out if a person is in the system already – and you can select their name again when needed which will automatically update their biography. This way each person will have only one biography in the system but as many case records as applicable to them. At any time, your team can look up the biography of an individual and get the history of their involvement with cases at your center.

Steps to Creating New Case(s) – This is the only process in NCAtrak that you need to finish once you start in order to save everything. This is because NCAtrak is storing all the pieces of data that you enter until you finish. Then it will automatically put all the data correctly in each case that you open. Be sure to start the data entry when you have enough time to finish it. Creating a new case takes approximately 10-15 minutes depending on how much data you have at the time you are creating the case. This is a very abbreviated list of the steps. More specific help can be accessed by clicking on Step 1: Start with the Alleged Victim/Client .

1.       Start with the Alleged Victim/Client (if more than one, pick one)

2.      Look-up person’s name in NCAtrak and select their name if they are already in the system.

3.      Enter or update the data about this person (if they are already in NCAtrak, you just need to update their data).

4.      Add all other people associated with this case (other alleged victims/clients, caregivers, alleged offenders)

a.       Look-up each person’s name in NCAtrak

b.      Select and update the person’s data or enter them as a new person in the system

5.      Save and Open Case(s)

6.      Identify which agencies and personnel are or will be working on the case(s)

7.      Identify applicable types of MDT meetings

8.      Done

**Glossary of Terms**

      Case – A Case is a record of the activities of the team to address the needs of an alleged victim/client including all services provided by team members. It includes a list of information about all people that are associated with the case, and links to each person’s Biography. It also includes a list of all other cases linked to the same allegation when applicable. ***There is only 1 alleged victim or client associated with each case record.***

      Biography (Bio) – When you look up a person’s name in NCAtrak, you not only get their name but you get access to their Biography. This Biography is created for every person ever added to a case record in NCAtrak and contains everything about them in NCAtrak including their Personal Profile (Name, Date of Birth, SS#, Race, Gender, etc) and a list of all the cases they are on in NCAtrak.

      Incident – The incident is the record of what was reported about the abuse at the time of the referral. It is clear that there are times when there are multiple ‘instances’ of the abuse occurring but in NCAtrak the term incident captures all of the instances collectively. Examples of ‘incidents’:

o        Child said babysitter came to her room one time and touched her

o        Child said babysitter comes to her room every time she baby-sits and touches her

      Reason for Referral – Identifies why the alleged victim– or client was referred to your CAC. It not only identifies what services your CAC and member organizations are likely to provide but it is an important distinction for NCA statistical reports and other reporting your center needs. There are three options:

         Allegation of Abuse - This option is to be used when there is an **Alleged Victim** in need of the services of all or part of your multidisciplinary team for the purposes of investigating an allegation of abuse.

         Requesting Other DIRECT Services - This option is provided for you in the event that your CAC provides services to a **Client** when a specific Allegation of Abuse toward the Client has not been made (or reported) however the Client is in need of services that your CAC can provide.

* + A person is referred for a specific mental health service that your CAC provides
	+ A person is referred for a specific medical procedure that your CAC provides
	+ A person is a sibling or friend of an alleged victim. There is no report of abuse regarding this child but you still want to provide a forensic interview and maybe other services. The key with this example is that your team does not view this child/person an alleged victim at this time.
	+ There is a need for a courtesy interview for another CAC and you don’t want to count the child as a victim for your center.

Requesting Other INDIRECT Services - This option is provided in the event that your Center is doing some work on behalf of a child or adult. In these cases the child or adult is a *‘Client’* - but only indirectly. Your center can still capture data about these efforts in a case record. Examples:

o        Your Medical Providers provide consultation for a case that will never be seen at their office or at the CAC.

o        Your CACs works with the MDT to provide case management but the alleged victim will never set foot in the CAC.

      Alleged Victim/Client - NCAtrak uses the combined term for alleged victim and client because case records in NCAtrak are created to track abuse investigations and to record services provided for other reasons. If your CAC is providing services to people who are not alleged victims they are called ‘Clients’ in NCAtrak.

         Alleged Victim – The person who is the alleged to have been abused.

         Client – The person who has been referred to the CAC for other services. They might get a forensic interview related to another person’s alleged victimization (they are not a victim) or they might participate in another program offered through you CAC.

         Co- Victim - A Co-victim is an alleged victim on a case when there are reportedly multiple victims. A separate case will be created for each co-victim.

         Co-client – A Co-client is a person who is going to receive services from the CAC but they have not been identified as an alleged victim. For example, CACs often interview siblings of alleged victims because they are in the home and may be able to help with the investigation. If the event that the sibling is not an alleged victim, it is still appropriate for that child to have a separate case record as they are a client of the CAC.

      Linked Cases - Cases related to the same allegation of abuse are linked together automatically by the system or you can do it manually after all the cases are created in NCAtrak.

      **Step 1: Start the case record**

Click ‘Create New Case(s)’ - located in the NCAtrak menu - Menu/Cases/Create New Case(s). A Create New Case(s) page appears in the active pages area. There are 4 buttons in the header that you will use as you progress through the steps. The Person Look-up Table will automatically display in a pop-up window for you when you begin to create a new case.

      **Step 2: Determine if the alleged victim/client is already in the system**

1. Enter all, or at least the first part of the last name of the alleged victim/client, and click “Search.” Or, you can use the “Previous/Next” commands at the bottom of the table to work your way through the list manually if it is long.
2. Complete the Look-up step by doing one of the three options below:

         If you do not find a match, click ‘No match found’ and continue to Step 3.

         If you find the person’s name and you are certain this person is the same person as the one you are entering on a new case, click ‘Select’ beside their name. This will automatically fill-in your new case record with the information already in NCAtrak for this person and will add the new case(s) you are creating now to their Personal Biography. Continue to Step 3.

         If you find someone that might be a match but you are not certain, click “View” to see the person’s Biography. The pop-up window will expand to show an abbreviated version of the person’s Biography which is made up of their Personal Profile and a list of cases that they have been listed on in NCAtrak, (regardless of their role on the case). Review the information displayed; expand the data tables to show greater detail by clicking the (+) marks contained in the Cases Section. Click the case number to see more details.

o     If you do find the person you are creating a case for, click “Select” beside their name. There biography information will appear in the Create New Case(s) page. Continue to Step 3 below.

o     If this turns out not to be the person you are trying to enter on this new case, click ‘Cancel’ and continue to Step 3.

NOTE: If you closed the Look-up Person list and need to open it again, click the ‘Look-up Person’ button on the page.

      **Step 3: Enter or update information about the alleged victim/client**

1.       The data entry for the alleged victim/client information is divided into several sections. Even if the person you entered was in the database and you selected them from the Person Look-up table, go through each section, entering/updating the data to make it current and relevant to this new case.

2.      When you finish continue to Step 3.

**Description of each section**

       Personal Profile Section – This section contains the data entry fields where you can enter information about the alleged victim/client. Personal Profile information typically does not change, like name, date of birth, race, and gender.

       Case Specific Information– This section is where you enter information that can be different each time an alleged victim/client is referred to your center for an allegation of abuse and/or for other services.

       Referral – The referral section is where you enter information about why the alleged victim/client is being referred to your CAC. This section displays different data entry fields depending on which reason for referral you select.

       Prior Interviews – Use this to record when someone interviewed the alleged victim/client prior to the referral to your CAC. You can enter more than one interviewer by saving and entering another row of data.

       MDT – This section allows you to put this case on a specific meeting roster and/or enter recommendations from the MDT that are known at the time of the referral.

**Data Field Descriptions**

The table below contains information about each data field you will find in this step. In NCAtrak, **Red** fields indicate information used in the NCA Statistics Report and/or information you must enter.

| **Data Fields** | **How to Use** |
| --- | --- |
| **Personal Profile Information** |
| **First**, Middle, **Last** **Names**, and Nick Name | Enter what you know. The first and last name fields are highlighted in red because they are required fields. If you know a first name but not a last, (or the other way around) enter “unknown” for the missing part of the name. By entering unknown you will have a better chance of finding the person again in the person look-up list because you can search for all ‘unknowns’ at the same time.  |
| SSN | The Social Security Number will format for you as you enter the numbers. You do not need to enter the dashes. |
| Date of Birth |          You can type the date in the data field box by entering the numeric month/date/year. The “/” marks will automatically appear so you only need to type the numbers. Use the mm/dd/yyyy format to be sure your date is entered correctly.         Or you can look up the date on the calendar.          If you enter the Date of Birth, the Age at time of Referral (in the case specific information section) will automatically update based on the date the case was received by the CAC.If you don’t know the DOB but you do want to enter an Age, you can do so in the Case Specific Information section. |
| **Gender**, **Race**, Religion, Language, and Disabilities | Use these fields according to your CAC’s protocols for entering data about people on the cases. The choices for each have been entered by your CAC. Gender and Race are used on the NCA report and are often helpful in reporting to CAC funding organizations. Religion, Language, and Disabilities are need by some CACs for their reports to funding organizations.  |
| Special Needs, Comments | These are text boxes to give your center room to communicate issues about the person you are entering. |
| Custom Fields | There are 5 custom fields available for your center to use in this space. Use the tools under Administration to activate a custom field. You will need permission from the NCAtrak security officer at your CAC. |
| **Case Specific Information**  |
| VOCA Status | This field is a customizable pick list where you can identify if this person is a primary victim, secondary victim, or any other designation you need for a report to a funding source. |
| **Age at Time of Referral** | This field automatically calculates if you entered the Date of Birth above, based on the date the case was received by the CAC. If you don’t know the DOB but you do want to enter an Age, you can do so here. |
| Years/Months | The system will track months from 0-24 for infants and toddlers. Once a child is 25 months, you need to use 2 years. |
| Address Line 1, 2, City, State, Zip, County |          Address Line 1 and 2 are for you to use as you desire.         City and Zip are text fields that you enter yourself.         State and County are pick lists that automatically enter your CAC state and county but you can select different ones when necessary.  |
| Home, Work, and Cell Phone | Phone number can be entered as 7 digits, or 10 digits, and the system will automatically format the numbers for you like this: (xxx) xxx-xxxx. If you need to include an extension, add an “x” immediately after the last number and up to a 4 digit extension. For more help with telephone numbers see the NCAtrak Basic Navigation Guide.  |
| School or Employer | The Employer option for this field is best used when the person you are entering is a parent, alleged offender, or other significant adult on the case.  |
| Education level | This pick list is created by your CAC.  |
| Marital Status | This field is more likely to be used when entering an adult on the case. The pick list of options was created by your CAC. |
| Income Level of Household | This pick list is also created by your CAC.  |
| Custom Fields | There are 5 custom fields available for your center to use in this space. Use the tools under Administration to activate a custom field. You will need permission from the NCAtrak security officer at your CAC. |
| **Referral Information** |
| **Date Received by the CAC** | Today’s date is automatically entered. You can edit the date when necessary by typing the date or using the calendar drop-down. |
| Referral Source and Person | These pick lists created by your CAC contain the agencies and persons on your team or that you work with in the community. If the referral source/person making the referral is not from an agency that you want to track, (for example, the referral source is a neighbor) select “Other” and you will be provided with additional fields to enter the type of referral (like neighbor) and the person’s name or anonymous – whatever is appropriate for this case and your center procedures. |
| **Reason for Referral**: (Select one of three options) | Allegation of Abuse - When you select Allegation of Abuse the following fields will appear:         Date first reported - This is provided because the date the allegation was initially reported may be different from the date that your CAC received the referral.         Alleged Maltreatment - check boxes allow multiple selections. The list is created by your CAC as a system pick list.         Incident Information including,o        Location Description text boxo        State, County - automatically displays your CAC’s default state and county o        Location Type pick list created by your CACo        Narrative Description text field |
| Requesting Other Direct Services - When you select this option the following fields will appear:         Services Requested - check boxes allow multiple selections from a list created by your CAC.          Comments  |
| Requesting Other Indirect Services - When you select Indirect CAC services the following fields will appear:         Services Requested - check boxes allow multiple selections from a list created by your CAC.          Comments  |
| Custom Fields | You may have up to 5 Custom Fields displaying here for data entry. These are unique to your CAC and are set-up by your center for your needs. |
| **Prior Interviews Information** |
| Agency and Interview Date | This table provides a place for information about interviews that take place prior to the case coming to the CAC. For example, a police officer may have conducted an initial interview during a domestic disturbance call.  |
| **MDT Information** |
| MDT Meeting | You have the option of entering today’s date or selecting a date from the pick list of dates for MDT meetings that have been scheduled by your CAC. If you already have recommendations you can enter them here as well. |
| Attendees Present  | If your team has already met on this case you can identify who was in attendance.  |
| Recommendations | This is a pick list created by your CAC for recommendations that you would typically make as a team. |
| Comments | This is a text box for you to use to record additional details about the recommendation of the team. |
|  |  |  |  |

      **Step 4: Temporarily ‘store’ the information about the alleged victim**

Click the ‘Add Another Person’ button. The information you entered so far will be in temporary storage in the web server as you continue. Two tables are now displayed on the page:

      Alleged Victim(s)/Clients(s) table – This table will contain the name of the alleged victim/client you entered on the first case.

      Other People table – The people you add in this table will appear on the cases.

Duplicate Check –The database will allow you to have two people with the same name, however, if a name is already in the database, you will see a Duplicate Check Pop-up Window. Click ‘View” to see information about the person that is already in NCAtrak to determine if it is the same person that you are trying to enter.

         If it is the same person, Click Select. The system will add to the screen the data already known about this person’s personal profile. If you have better data in your referral information, you can edit what the system enters. This will make the data in your new case correct and will update the data in the person’s biography.

         If it is not the same person, click ‘No Duplicate Found’ and then click ‘Add Another Person” again. NCAtrak will accept this new person you are trying to enter.

      **Step 5: (optional) Start additional case(s)**

This is an optional step because there are not always co-victims or co-clients associated with each CAC case. If you only need to create one case right now, continue to Step 6.

1. Click ‘Add’ in the Alleged Victim/client table.
2. Repeat Steps 2 and 3.
3. IMPORTANT - Click the ‘Save Person’ Button to store each of these additional new cases, (Located at the top of the Personal Profile section). The person’s name will be added to the Alleged Victim(s)/Client(s) table.
4. Continue to Step 6.

      **Step 6: Add ‘Other People’ to the case(s)**

Now add Other People (caregivers, alleged offenders, siblings that will not receive any services from your CAC). As you complete the data entry these people will be stored for entry into all the other cases that you have started.

1.       Click “Add” in the Other People table to enter the first of the other people associate with the case.

2.      Complete Steps 2 and 3. Notice as you do that the required information for ‘Other People’ does not include the Reason for the Referral. Instead this time you must indicate the ‘Relationship to Alleged Victims/Clients.’ The data fields for this section are in the table below.

a.       Select the first Alleged Victim/Client in the pick list, enter the information, and click ‘Save’ in the table row.

b.      Repeat by selecting each other alleged victim/client one at a time until all relationships are entered.

3.      IMPORTANT – LOCATE AND CLICK THE ‘SAVE PERSON’ BUTTON TO SAVE THIS PERSON BEFORE MOVING TO THE NEXT, (Located at the top of the Personal Profile section). The person’s name will be added to the ‘Other People’ table.

4.      Repeat until all other people associated with the case are entered.

5.      Continue to Step 7.

| **Data Fields** | **How to Use** |
| --- | --- |
| Victim/Client | This is a list of each Alleged Victim/Client you have entered. |
| **Relationship** | This is a pick list of possible relationships that the person could have with the Alleged Victim/Client you selected in the pick list. |
| **Role** | This is a pick list of possible roles this person could have in the Alleged Victim/Client’s case. Remember, you are creating a separate case for each Alleged Victim/Client that will be linked to all of the cases for this investigation. A person could be a caretaker to one Alleged Victim/Client and an Alleged Offender to another. |
| Same Household | Check this box if the person lives in the same household with the Alleged Victim/Client. |
| Custody | Check this box if the person has custody of the Alleged Victim/Client.  |

      **Step 7: Save and Open Case(s)**

Click the Save and Open Case(s) button to create all of the cases that you are working on. At the top of the screen you will see the ‘Newly Opened Cases’ displayed in the table with their case numbers now assigned. There should be one new case record for each alleged victim/client you entered with a CAC case number automatically assigned to each.

      **Step 8: Identify which agencies and personnel working on the case(s)**

Enter what you know of the agencies and personnel assigned to the case(s) in the Agency and Personnel Assignments table.

1. Select ‘NA’ if you know that a specific task is not applicable to this case.
2. Click ‘Refer’ in the action column and row for a service.
3. Enter the information you know about that service. Note that some information may appear automatically using default information set-up for your CAC.
4. Click “Save” in each row as you enter data to be sure each entry is saved.

| **Data Fields** | **How to Use** |
| --- | --- |
| Service | Each type of service of activity that might occur for a case is identified.         **MDT** – One or more reviews by the multi-disciplinary team         **CPS** – Investigation by your local Child Protective Services agency. CPS is the generic term, your local state agency is likely to have a different name.         **LE** – Investigation by you local law enforcement         **Medical** – A medical evaluation either for forensic purposes or other purposes         **FI** – A Forensic Interview         **MH** – Mental Health Services         **VA** – Victim Advocacy Services, sometimes referred to as Family Advocacy         **Prosecution** – Prosecutor’s office activity related to prosecution of the alleged offender including review of the case.  |
| Referral Date | The date the service was requested. |
| Referred by agency and personnel | Who requested the service for this case? Examples-          A community member ‘referred’ the case to CPS         CPS contacted Law Enforcement and the CAC to set up a FI and Medical exam |
| Providing Agency and primary contact | Which Agency and personnel is going to provide the service, or be the primary contact about the service?  |
| Other Significant Agency and Personnel | Use to identify other key agencies and personnel involved in the investigation. |

      **Step 9: (Optional) Select the MDT meeting types applicable for these cases**

Some CACs have MDT meetings for multiple jurisdictions and/or they have MDT meetings for multiple reasons, (for example, case review or peer review). If your CAC has more than one type of meeting or more than one jurisdiction for MDT meetings select the applicable meetings for these cases.

      **Step 10: View case(s) or continue adding new cases**

You have two buttons that give you two options. Click the one you desire.

      Done and Add Another Case – this button is helpful when you are entering several new referrals at the same time and you just want to go back on entering cases.

      Done and View Case – this button is useful when you would like to continue working in the newly created case record(s). It will take you to the case record of the first Alleged Victim/Client that you entered.

      **Step 11: (Optional) Identify relationships of co-victims/co-clients**

When you create more than one case this extra step is necessary because the process of creating multiple cases cannot support identifying these relationships. If you created multiple cases each case is listed on the General Tab of each case record under the section, ‘Cases Linked to this Allegation.’

A.      Click the case number of one of the co-victims/co-clients.

B.       Click the People Tab. Notice that the relationship of the co-victim(s) to the alleged victim in this case is listed as ‘Unknown.’

C.       Click Edit on the co-victim/co-client row.

D.      Select the appropriate relationship from the ‘Relationship to Victim’ pick list.

E.       Click ‘Save’

F.       Repeat until all known relationships are updated.

      **Delete a Case**

Person’s with privileges to delete a case can do so from the General Tab of the Case Record.