CRCG Monthly Data Tracking Worksheet

This CRCG Data Tracking Worksheet is a simple tool to help track the activities and people served during CRCG meetings and staffings. It follows the same sequence of screens as the online CRCG data collection system, making it easier to organize information and prepare monthly reporting.

Using this worksheet throughout the month can reduce the time needed to enter data. Data reporters can mark the worksheet during or after each meeting or staffing so the information is ready when it is time to enter data into the CRCG data collection system.

Key features:

- Required questions are marked with an asterisk (*).
- The worksheet can be customized to add space for notes or prefill certain fields.
- It can be used as a hard copy or completed electronically in Microsoft Word.
- A Word version of the worksheet is available to download in the data system.

Worksheet

CRCG Name: Example CRCG

County or Counties: Alpha and Bravo

Month and Year: June 2026

Referral and Meeting Information

1. * How many referrals did the CRCG receive this month? 6
2. * How many referrals did the CRCG connect to or coordinate services for *without* a formal staffing? 2
3. * Did the CRCG meet this month?

   ☒ Yes

   ☐ No
4. * If yes, mark the purpose of meeting (select all that apply):

   ☒ Staffing

   ☐ Case check-in (follow-up with no changes to the Individual Service Plan [ISP])

☒ Presentation, training, or general information sharing

☒ Other: Other purpose

5. * Mark the agencies and programs that had a representative present for at least one meeting or staffing this month (check all that apply).

Attendees

Department of Family and Protective Services (DFPS)
☐ Adult Protective Services
☒ Child Protective Services (including Post Adoption Services)
☐ Child Protective Investigations
☐ Prevention and Early Intervention (STAR, SYSN, THV, MFVPP, HOPES, CYD, CBFS, Fatherhood, HEAL)
☒ Statewide Intake

☒ **Department of State Health Services (DSHS)** - Title V Maternal and Child Health

Texas Health and Human Services Commission (HHSC)
☐ Area Agency on Aging (AAA)
☐ Aging and Disability Resource Centers (ADRC)
☐ Independent Living
☒ Local Intellectual and Developmental Disability Authority (LIDDA)
☒ Local Mental or Behavioral Health Authority (LMHA or LBHA)
☐ State Benefits or Maximus

Juvenile Justice
☒ Juvenile Probation Officer
☐ Texas Juvenile Justice Department (TJJD)

Texas Department of Criminal Justice (TDCJ)
☐ Adult Parole or Probation
☐ Texas Correctional Office on Offenders with Medical or Mental Impairments (TCOOMMI)

☐ **Texas Department of Housing and Community Affairs (TDHCA)**

Texas Education Agency (TEA)
☐ Education Service Center (ESC)
☒ Independent School District (ISD): School name

☒ **Texas Workforce Commission (TWC)**

Peer Representative
☒ Family
☐ Youth

Other Community Attendees
☐ Alcohol and Drug Abuse Council (ADAC)
☐ Child Advocacy Centers (CAC)
☐ Court Appointed Special Advocates (CASA)
☒ Community Health Centers
☒ Faith-Based
☐ Law Enforcement Representative
☐ Managed Care Representative
☒ Nonprofit Social Service Providers: Agency or organization name
☐ Other Mental Health Representative
☐ Substance Use and Misuse Representative
☒ Other: Agency or organization name
☐ Other: Enter text.

Additional Referral and Meeting Information: Additional information

Staffing Information

Staffings

Track number of staffings per county, types of staffings, and person or family attendance.

* Number of Staffings per Person's County of Residence:		First-Time Staffings	First-Time Staffings	Follow-Up Staffings	Follow-Up Staffings
		Tally	Total	Tally	Total
County Name	Alpha	II	2	I	1
County Name	Bravo	I	1		0
County Name					
County Name					
County Name					
County Name					
County Name					

Staffing Questions	First-Time Staffings	First-Time Staffings	Follow-Up Staffings	Follow-Up Staffings
	Tally	Total	Tally	Total
* Of the total number of staffings, how many were reintegration staffings?		0	I	1
* Of the total number of staffings, how many were expedited staffings?		0		0
* How many staffings included the person, parent or caregiver, legally authorized representative (LAR), legal guardian, or family member?	III	3	I	1
* Of the total number of staffings, how many families were identified as at risk of relinquishment (termination of parental rights)?	I	1		0
* Of the families identified as at risk of relinquishment during staffings, how many did the CRCG connect to community-based options that helped prevent relinquishment?	I	1		0

Demographics

Use the demographic data sheet provided by the HHSC CRCG team in Module 4 of the CRCG Training Toolkit or a customized local tool to gather this information at each staffing.

Age	Ethnicity	Race	Sex	Primary Language
14	Not Hispanic	Asian	Male	Vietnamese
31	No data collected	No data collected	Female	English
18	Hispanic	White	Prefer not to answer	Spanish
11	Not Hispanic	Black or African American	Male	English

Strengths Assessment

Track all strengths people and families expressed during staffings this month.

Strength(s) Expressed:	First-Time Staffings	First-Time Staffings	Follow-Up Staffings	Follow-Up Staffings
	Tally	Total	Tally	Total
Academics or School				
Basic Needs and Self-Sufficiency	II	2	I	1
Caregiver Involvement	II	2		
Community Life or Social Engagement				
Employment or Vocational	I	1		
Family or Peer Support				
Family Strengths	II	2		
Healthcare Coverage	II	2	I	1
Housing Stability	III	3	I	1
Interpersonal Skills				
Knowledge of Service Options				
Natural Supports	II	2	I	1
Optimism				
Positive Therapeutic Relationship			I	1
Recovery				
Recreation and Leisure Activities	III	3	I	1
Resilience				
Resourcefulness				
Safety				
Self-Care	I	1	I	1
Spiritual or Religious			I	1
Talents or Interests				
Other: Other strength	I	1		
Other:				
Other:				

Additional Information: Additional information

Concerns and Needs Assessment

Track all concerns and needs people and families expressed during staffings this month.

Concerns and Needs Expressed:	First-Time Staffings	First-Time Staffings	Follow-Up Staffings	Follow-Up Staffings
	Tally	Total	Tally	Total
Academics or School	II	2		
Aging Services				
At-Risk for Out-of-Home Treatment Options	I	1		
Autism Services	I	1		
Basic Needs and Self-Sufficiency	I	1		
Physical Disability Services				
Employment or Vocational Training	I	1		
Family or Peer Support				
Family Therapy or Family-Based Services	II	2		
Housing or Rental Assistance				
Healthcare Coverage				
Intellectual and Developmental Disability Services				
Justice Involvement				
Legal Assistance				
Mental Health Care	III	3	I	1
Medical Improvements to the Home				
Physical Health and Functioning			I	1
Risk Behaviors	II	2		
Respite				
Returning to the Community from an Out-of-Home Treatment Option			I	1
Substance Use and Misuse Programs or Services	I	1		
Social Engagement				
Skill Development	II	2	I	1
Service Coordination				
Transition Planning from Youth to Adult Services	I	1		
Transportation			I	1
Trauma-Focused Services	I	1		
Other: Other concern or need	I	1		
Other:				
Other:				

Additional Information: Additional information

Individual Service Plans

Track the number of times the CRCG recommended each service and support in Individual Service Plans (ISPs) this month.

Services and Supports	First-Time Staffings	First-Time Staffings	Follow-Up Staffings	Follow-Up Staffings
	Tally	Total	Tally	Total
Aging and Disability Resource Center (ADRC)				
Autism Services	I	1		
Basic Needs	I	1		
Child Care				
Children and Youth with Special Health Care Needs (CYSHCN) Program				
Community Support			I	1
Diversion Slots				
Employment or Vocational Training	I	1		
Family Therapy or Family-Based Services	II	2		
Home and Community-Based Services – Adult Mental Health (HCBS-AMH)				
Housing				
Homelessness Prevention				
Intellectual and Developmental Disability Services				
In-Home Healthcare				
Job Training				
Juvenile Justice Services				
Legal Assistance				
Mental Health Services	III	3	I	1
Mentoring Program or Social Skills Program				
Other School-Based Interventions, Services or Supports				
Physical Health Services (doctor appointments, special equipment or supplies for home)			I	1
Parent Support or Skills Group	II	2		
Out-of-Home Treatment Options	I	1		
Post Adoption Services				
Respite Care				
Rental Assistance				
School-Based Behavioral Interventions	II	2		
Special Education Services	I	1		
State Benefits (SNAP, Medicaid, TANF)				
Substance Use and Misuse Programs or Services				
Transportation			I	1
Transition Planning from Youth Services to Adult Services	I	1		
Wraparound – Non-1915(c) Waiver Funding				
1915(c) Waivers (MDCP, YES, HCS, CLASS, DBMD, TxHmL)	II	2		

Services and Supports	First-Time Staffings	First-Time Staffings	Follow-Up Staffings	Follow-Up Staffings
	Tally	Total	Tally	Total
Other: Other service or support			I	1
Other:				
Other:				

Additional Information: Enter text.

If a 1915(c) waiver was recommended as part of ISPs, track the number of times each type of waiver was recommended by the CRCG during staffings this month.

1915(c) Waivers	First-Time Staffings	First-Time Staffings	Follow-Up Staffings	Follow-Up Staffings
	Tally	Total	Tally	Total
Texas Medically Dependent Children Program (MDCP)				
Texas Youth Empowerment Services (YES)	I	1		
Texas Home and Community-based Services (HCS)	I	1		
Texas Community Living Assistance and Support Services (CLASS)				
Texas Deaf Blind with Multiple Disabilities (DBMD)				
Texas Home Living Program (TxHmL)				

If an out-of-home treatment option was recommended as part of ISPs, track the number of times each out-of-home treatment option was recommended by the CRCG during staffings this month.

Out-of-Home Treatment Options	First-Time Staffings	First-Time Staffings	Follow-Up Staffings	Follow-Up Staffings
	Tally	Total	Tally	Total
Waco Center for Youth	I	1		
North Texas State Hospital				
HHSC and DFPS Residential Treatment Center Project				
Other Residential Treatment Facility				
Nursing Facility				
How many ISPs included recommendations for the family during the child's out-of-home treatment and plans for their return?	I	1		

General Questions

Track the meeting details of all staffings held this month and total them in the table below.

Questions	Tally	Total
1. * Of the ISPs created this month, how many ISPs had recommendations listed that were in the least restrictive, most normative environment that is clinically appropriate to meet the person's needs?	IIII	4
2. How many staffings were held this month where an interpreter was not available for a person or family who needed or requested one?		0
3. How many staffings this month were the result of the permanency planning notification requirement for children with developmental disabilities in institutional settings?		0
4. How many staffings this month were for juveniles under age 12 who were referred by probation?	I	1

Track the number of people staffed this month that returned from each out-of-home treatment option, if applicable.

Out-of-Home Treatment	Tally	Total
Waco Center for Youth		
North Texas State Hospital		
HHSC and DFPS Residential Treatment Center Project	I	1
Other Residential Treatment Facility		
TJJD Commitment		
Probation Treatment		
Nursing Facility		

Track the number of times each barrier was identified this month through the process of creating ISPs.

Physical Barriers	Tally	Total
The person or family lacks transportation.	I	1
The person or family has limited communication skills.		
There is a language barrier between the person or family and the CRCG.		
Scheduling conflicts between the person or family and the CRCG.		

Service Availability Barriers	Tally	Total
Lack of funding for services (specify below).	I	1
Waitlist for programs or services.	II	2
The person or family does not meet eligibility requirements.		
The CRCG has limited knowledge of available resources and services.		
Inconsistent delivery of state-based services.		
Lack of appropriate programs or services (such as transition services, services for people with autism spectrum disorder).		
No available program or service providers.		

List all agencies or programs that report lack of funding as a primary barrier to support ISP services:
Agency or program name

Agency Barriers	Tally	Total
Staff shortages.		
Staff turnover.		
Use of agency-specific language limits collaboration.		
Unclear agency processes.		
Limited participation from state agencies.		
Lack of accountability among service providers.		

Client Choice to Not Access Services	Tally	Total
The person or family had previous negative experiences accessing services.		
The person or family believes the services or supports offered are not sensitive or responsive to their race, religion, national origin, sex, physical disability, socio-economic status, geography, language or other characteristics.		
The person or family has limited awareness of the need for services.		
The person or family lacks understanding of service processes or programs.		
The person or family engages in behaviors that result in rejection from services.	I	1
The person or family was previously noncompliant with services.		
The person or family prefers a small number of service providers.		
The person or family has concerns about engaging with services (such as immigration, Child Protective Services, medical providers).		

Additional information: Additional information

Dispose of the CRCG monthly data tracking worksheet after the information is entered and submitted into the CRCG data collection system, in accordance with the HHSC Records Retention Schedule.