



Texas Department of  
**Family and Protective Services**

# Family Plan of Service Family Substitute Care (FSU) and Family Reunification (FRE) – Introduction to New Features

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# Family Plan of Service – Introduction to New Features

The **Family Plan of Service** (Family Plan) for **Family Substitute Care (FSU)** and **Family Reunification (FRE)** has been updated in IMPACT 2.0. The new **Family Plan** template employs new features and functions that streamline the processing and management of **Family Plans** and **Family Plan Evaluations**. The **Family Plan** for both **FSU** and **FRE** are considered as initial **Family Plans** and all subsequent plans are **Family Plan Evaluations**.

Training will reflect steps and descriptions for both **FSU** and **FRE** unless there is a specific difference noted. The screenshots, unless there is a difference for **FRE**, will reflect **FSU**.

In IMPACT 2.0, you have both the ability to launch forms for printing as well as download to create a PDF version. Information about launching and downloading forms is covered in the IMPACT 2.0 Basic Overview course.

**Stages Impacted:** FSU, FRE

## New Feature – One List Page for Everything



The new system consolidates all **Family Plans** and **Family Plan Evaluations** onto one **Family Plan List** page.

You will be able to view plans and evaluations in all stages and statuses, all on one page! This includes plans in the stages of **Family Substitute Care (FSU)**, **Family Reunification (FRE)**, **Family Preservation (FPR)** and with a status of In-Process (PROC), Pending (PEND), Completed (COMP) or Approved (APRV).

The screenshot shows the 'Family Plan List' page in the IMPACT 2.0 system. The page has a navigation menu on the left with 'Family Plans' selected. The main content area displays a 'Family Plan List' table with columns for Date Entered, Status, Stage, Type, Description, Entered By, and Event ID. A single row is visible with the date 12/12/2018, status PROC, stage FSU, and type Family Plan. Below the table are buttons for 'Delete', 'Add', and 'Launch Form'. There is also a 'Reports' section with a dropdown menu and a 'Launch' button.

Date Entered	Status	Stage	Type	Description	Entered By	Event ID
12/12/2018	PROC	FSU	Family Plan	FSU REG Family Plan		

# New Feature – View, Edit, or Delete Historical Family Plans and Evaluations



You can now view existing **Family Plan** and **Family Plan Evaluation** details in PROC, PEND, COMP, and APRV status, even if the plan is associated with an evaluation.

You can also edit plans and evaluations in "PEND" status, and delete plans or evaluations in "PROC" status.

The screenshot displays the 'Family Plan List' interface. On the left is a sidebar with navigation options: Case Summary, Person, Contacts/Summaries, Service Authorization, Legal, SDM Assessments, **Family Plans**, Medical, Conservatorship Removal, and Case Management. The main content area has tabs for 'Family Plan', 'Services and Referrals Checklist', and 'Visitation Plan'. Below the tabs, there are search filters for 'Stage Name' and 'Case ID', and a 'Show 10 entries' dropdown. A table lists the following entries:

Date Entered	Status	Stage	Type	Description	Entered By
01/24/2019	PROC	FSU	Family Plan Evaluation	FSU REG Family Plan Event [redacted] completed 07/31/2017 evaluated	[redacted]
01/05/2019	PROC	FSU	Family Plan	Family Plan [redacted]	[redacted]
11/12/2018	APRV	FSU	Family Plan	Family Plan - [redacted]	[redacted]
07/31/2017	APRV	FSU	<b>Family Plan</b>	FSU REG Family Plan completed 07/31/2017	[redacted]
07/31/2017	APRV	FSU	Family Plan	FSU REG Family Plan completed 07/31/2017	[redacted]
07/31/2017	COMP	FSU	Family Plan Evaluation	FSU REG Family Plan Event [redacted] completed 07/31/2017 evaluated 07/17/2018	[redacted]

At the bottom, it says 'Showing 1 to 6 of 6 entries' and includes 'Delete', 'Add', and 'Launch Form' buttons.

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## New Feature – Fields Prefill from the FSNA (Family Strengths and Needs Assessment)

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Many of the sections in the Family Plan and the Family Plan Evaluation are now prefilled from the Family Strengths and Needs Assessment (FSNA).

This will reduce the time spent replicating data, and will streamline the process of completing a Family Plan or Family Plan Evaluation.

The screenshot shows a software interface with a navigation menu on the left and a main content area. The main content area has tabs for 'Family Plan', 'Services and Referrals Checklist', and 'Visitation Plan'. A 'Select FSNA' dropdown menu is open, showing a table of available FSNA records. The table has columns for 'Type', 'Description', 'Primary Parent', 'Secondary Parent', and 'Entered By'. A 'Continue' button is located at the bottom right of the table.

Type	Description	Primary Parent	Secondary Parent	Entered By
<input type="radio"/>	RCAS	SDM FSNA - Reassessment		

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## New Feature – Forms Launch from Multiple Pages – And Can Be Digitally Signed

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IMPACT 2.0 Forms can now be easily launched and downloaded from both the **Family Plan List** page and the **Family Plan Detail** page.

And one more of the "new and improved" helpful features: **Family Plan** and **Family Plan Evaluation** forms can now be *digitally signed*!

# FAMILY PLAN

Substitute Care

Case Name: \_\_\_\_\_  
Case Number: \_\_\_\_\_  
Cause Number: \_\_\_\_\_

## PRIMARY PARTICIPANT(S):

\_\_\_\_\_

## PERMANENCY GOAL(S):(See last page for definitions)

Name of Child(ren)	Primary Permanency Goal(s)	Date to Achieve	Concurrent Permanency Goal(s)	Date to Achieve
	Family Preservation	01/28/2019	PTC	01/28/2019

## PLAN DATES:

Plan Completed/Conference Date:	01/28/2019
Next Review Due:	05/28/2019

## PARENT(S) ACKNOWLEDGEMENT

- I understand the Texas Department of Family and Protective Services (DFPS) has determined that one of the following emergency conditions continues to exist in my family, and therefore services continue to be necessary:
  - A child is at risk of abuse and or neglect, as determined by DFPS;
  - A child has been removed from his/her home and placed in DFPS care; or
  - A child formerly in DFPS care is at-risk of being returned to DFPS care.
- TO THE PARENT: THIS IS A VERY IMPORTANT DOCUMENT. ITS PURPOSE IS TO HELP YOU PROVIDE YOUR CHILD WITH A SAFE ENVIRONMENT WITHIN THE REASONABLE PERIOD SPECIFIED IN THE PLAN. IF YOU ARE UNWILLING OR UNABLE TO PROVIDE YOUR CHILD WITH A SAFE ENVIRONMENT, YOUR PARENTAL AND CUSTODIAL DUTIES AND RIGHTS MAY BE RESTRICTED OR TERMINATED OR YOUR CHILD MAY NOT BE RETURNED TO YOU. THERE WILL BE A COURT HEARING AT WHICH A JUDGE WILL REVIEW THIS SERVICE PLAN.
- I understand that if I have one or more children at home with me and if I am unwilling/unable to provide a safe environment for my child(ren) with the help of DFPS services, that the plan will be removal and placement of my child (ren) into foster care.
- I understand my progress on this plan will be evaluated as follows:
  - Have I completed my tasks in the plan?
  - Have I achieved my goals in the plan?
  - Can I provide for the ongoing safety and well-being of my child(ren)?
- I understand information for the evaluation of my progress may come from any and all of the following sources:
  - Me;
  - My family members;
  - The initial report or future reports of child abuse and/or neglect; and
  - Other agencies, individuals, and community.
- I understand I may request a review or change of this plan or an evaluation of my progress at any time. I may also request an administrative review if I have a complaint about Child Protective Services. I may also request a fair hearing if services I have requested are denied, reduced or terminated, or if Child Protective Services does not act on my request for services with reasonable promptness.
- I understand that I can request interpreter or translator services if needed to assist me in complying with this plan.

Signature-Parent/Caregiver: \_\_\_\_\_ Date: \_\_\_\_\_ Date Copy Given: \_\_\_\_\_

Signature-Parent/Caregiver: \_\_\_\_\_ Date: \_\_\_\_\_ Date Copy Given: \_\_\_\_\_

Signature-Worker: \_\_\_\_\_ Date: \_\_\_\_\_

Signature-Supervisor: \_\_\_\_\_ Date: \_\_\_\_\_

RELATIVES, FRIENDS AND PROFESSIONALS SIGNATURES:



Texas Department of  
**Family and Protective Services**

Family Plan of Service Family Substitute Care  
(FSU) and Family Reunification (FRE) –  
Family Plan List Page

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# Family Plan List Page – Introduction

One example of IMPACT 2.0's improved functionality in the **Family Plan** is first encountered on the **Family Plan List** page.

Now *all* **Family Plans** and **Family Plan Evaluations** for a Case ID appear on the **Family Plan List** page. In addition, all new **Family Plans** or **Family Plan Evaluations** are created from the **Family Plan List** page.

As a result of the consolidation, the **Family Plan Evaluation List** page and **Family Plan for Case** page have been removed.

Not only will you create new plans and evaluations from the list page, you will also be able to access and view historical **Family Plans** and **Family Plan Evaluations** listed on the page. Some plans will be read-only, others can be edited, and some can be deleted.

From the **Family Plan List** page, you can generate a **Case Event List** report, and launch IMPACT 2.0 forms that can be downloaded (and signed digitally!)

**Stages Impacted:** FSU, FRE

## Family Plan List Page – How to Get There



The **Family Plan List** page is the starting point when viewing, editing, or deleting existing plans and evaluations, or creating a new **Family Plan** or a **Family Plan Evaluation**, so let's start there!

1. From your **Assigned Workload** in the **My Tasks** tab, select the **Stage Name (FSU or FRE)** hyperlink for the case.

The screenshot shows the 'Texas Department of Family and Protective Services' interface. The 'My Tasks' tab is selected, and the 'Assigned Workload' section is highlighted. A table lists workload items with columns for SS, I, WS, Hr, P/S, M-Ref, Stage Name, County, Stage, Type, Opened, Assigned, Region, Unit, Stage ID, Case ID, and PGM. The 'Stage Name' column is highlighted, and the first row's 'Stage Name' is also highlighted.

SS	I	WS	Hr	P/S	M-Ref	Stage Name	County	Stage	Type	Opened	Assigned	Region	Unit	Stage ID	Case ID	PGM
<input type="checkbox"/>				P		...	...	FRE	INT	07/19/2018	07/20/2018	03	ED	...	...	OPS
<input type="checkbox"/>				P		...	...	FRE	REG	08/22/2018	08/22/2018	03	LD	...	...	OPS
<input type="checkbox"/>				P		...	...	FRE	REG	08/03/2018	08/03/2018	03	LD	...	...	OPS
<input type="checkbox"/>				P		...	...	FSU	REG	06/27/2017	02/23/2018	03	LD	...	...	OPS

2. You will arrive at the **Case Summary** page.
3. Select **Family Plans** from the secondary menu.

The screenshot shows the 'Case Summary' page. The left navigation menu has 'Family Plans' highlighted. The main content area includes a 'Case Summary' header, an 'Attention' banner, and 'Case Information' such as Case ID, Status (Open), Region, and Start Date of Case. Below this is a table of family plans with columns for My, M/R/L, Stage Name, Stg, Type, Opened, Time, Closed, Primary, My, Stage ID, Dr Dep, and Plans.

My	M/R/L	Stage Name	Stg	Type	Opened	Time	Closed	Primary	My	Stage ID	Dr Dep	Plans
<input type="radio"/>			RV	SRMBZ	08/05/2018	05:32 PM	05/28/2018				UHD	
<input type="radio"/>			RT	SR/R?	08/05/2018	09:13 PM	08/13/2018					
<input type="radio"/>			RIE	RFR	04/26/2017							
<input checked="" type="radio"/>			FRJ	RFR	04/26/2017							

4. You will arrive at the **Family Plan List** page.
5. Recognize there can be **Family Plans** and **Family Plan Evaluations** for the same Case ID in any status (COMP, PEND, PROC, or APRV) as well as any stage (**FSU**, **FRE**, or **FPR**.)

The screenshot shows the 'Family Plan List' page. The left navigation menu has 'Family Plans' highlighted. The main content area includes a 'Family Plan List' header, a 'Stage Name' dropdown, and a table of family plans. The table has columns for Date Entered, Status, Stage, Type, Description, Entered by, and Home ID. The 'Type' column contains 'Family Plan Evaluation' and 'Family Plan'. The 'Status' column contains 'APRV' and 'APRV'. The 'Stage' column contains 'RRI' and 'FSU'. The 'Description' column contains details about family plan evaluations and FSU/RRI family plans.

Date Entered	Status	Stage	Type	Description	Entered by	Home ID
02/28/2018	APRV	RRI	Family Plan Evaluation	FRI Res Family Plan Sent 2/28/2018 completed 03/14/2017 evaluated 02/28/2018		
04/12/2018	APRV	RRI	Family Plan Evaluation	FRI Res Family Plan Sent 2/28/2018 completed 03/22/2017 evaluated		
08/29/2018	APRV	RRI	Family Plan Evaluation	FRI Res Family Plan Sent 2/28/2018 completed 03/22/2017 evaluated 08/29/2018		
10/27/2017	APRV	FSU	Family Plan	FSU RRI Family Plan completed 10/27/2017		
07/27/2017	APRV	FRI	Family Plan	FRI RRI Family Plan completed 08/04/2017		

# Family Plan List Page – Creating New Family Plans

Follow the steps below to create a new Family Plan:

1. On the **Family Plan List** page, locate the **Add** button at the bottom right of the page.
2. Selecting **Add** initiates the process of creating a **Family Plan** for the stage in which you are working.

The screenshot shows the 'Family Plan List' page. At the top, there are tabs for 'My Tasks', 'Case', 'Search', 'Reports', and 'Resources'. Below these is a sidebar with various case management options. The main content area is titled 'Family Plan List' and contains a table of existing plans. The table has the following columns: Date Entered, Status, Stage, Type, Description, Entered By, and Event ID. There are five rows of data. At the bottom right of the table area, there is a red box around the 'Add' button, and next to it is a 'Launch Form' button. Below the table is a 'Reports' section with a search bar.

3. If no **Family Plan** exists for the Case ID, you will arrive at the new **Select FSNA** page, which is your first step in creating a new **Family Plan**.

The screenshot shows the 'Select FSNA' page. At the top, there are tabs for 'My Tasks', 'Case', 'Search', 'Reports', and 'Resources'. Below these is a sidebar with various case management options. The main content area is titled 'Select FSNA' and contains a table with the following columns: Type, Description, Primary Parent, Secondary Parent, and Deleted By. There is one row of data. At the top of the table area, there is a red box around the 'Select FSNA' button. At the bottom right of the table area, there is a 'Continue' button.

# Family Plan List Page – Creating Family Plans and Family Plan Evaluations – Validations and Error Alerts

Whenever you select the **Add** button to create a new **Family Plan** or **Family Plan Evaluation**, IMPACT 2.0 performs checks to confirm whether a new plan or evaluation can be created without a conflict.

If your attempt to create a **Family Plan** or **Family Plan Evaluation** fails the validations, you will be prevented from creating a new plan or evaluation, and will instead receive an error alert with the reason why.

The screenshot shows the 'Family Plan List' page. The title 'Family Plan List' is highlighted with a red box. Below the title, there are fields for 'Stage Name' and 'Case ID'. A table lists several records with columns: Date Entered, Status, Stage, Type, Description, Entered By, and Event ID. The 'Add' button is highlighted with a red box.

Date Entered	Status	Stage	Type	Description	Entered By	Event ID
01/20/2018	APRV	FSU	Family Plan	Family Plan - [redacted]	[redacted]	[redacted]
01/20/2018	APRV	FSU	Family Plan Evaluation	Family Plan Evaluation - [redacted]	[redacted]	[redacted]
12/11/2018	PROC	FSU	Family Plan	Family Plan - [redacted]	[redacted]	[redacted]
12/11/2018	PROC	FSU	Family Plan	Family Plan - [redacted]	[redacted]	[redacted]
07/28/2018	APRV	FSU	Family Plan	FSU/FRE Family Plan completed 07/27/2018	[redacted]	[redacted]

# Family Plan List Page – Error Alert for Selecting a Family Plan or Family Plan Evaluation Not in Approved (APRV) Status

If you select the radio button for a **Family Plan** or **Family Plan Evaluation** that is in "PROC," "COMP," or "PEND" status and select the **Add** button, you will receive an error alert that says: "Family Plans or Evaluations must be in APRV status to initiate an evaluation."

The screenshot shows the 'Family Plan List' page with an error alert. The error message is: "Your information contains 1 error(s) - Family Plan or Evaluation selected is not approved. Please select an approved record to add Evaluation." The error message is highlighted with a red box. Below the error message, the table shows a record with 'PROC' status and 'Family Plan' type, which is also highlighted with a red box.

Date Entered	Status	Stage	Type	Description	Entered By	Event ID
01/26/2018	APRV	FSU	Family Plan	Family Plan - [redacted]	[redacted]	[redacted]
01/26/2018	APRV	FSU	Family Plan Evaluation	Family Plan Evaluation - [redacted]	[redacted]	[redacted]
12/11/2018	PROC	FSU	Family Plan	Family Plan - [redacted]	[redacted]	[redacted]
12/11/2018	PROC	FSU	Family Plan	Family Plan - [redacted]	[redacted]	[redacted]
07/28/2018	APRV	FSU	Family Plan	FSU/FRE Family Plan completed 07/27/2018	[redacted]	[redacted]

# Family Plan List Page – Creating New Family Plan Evaluations

Follow the steps below to create a new **Family Plan Evaluation**:

1. On the **Family Plan List** page, select the radio button for an existing **Family Plan** or **Family Plan Evaluation** created in IMPACT 2.0 in the stage you are working in and that is in "APRV" status.
2. Locate the **Add** button at the bottom right of the page.
3. Selecting **Add** initiates the process of creating a **Family Plan Evaluation** for the stage in which you are working.

The screenshot shows the 'Family Plan List' page in the IMPACT 2.0 system. The page has a navigation menu on the left with options like 'Case Summary', 'Person', 'Contacts/Summaries', 'Service Authorization', 'Legal', 'SDM Assessments', 'Family Plans', 'Medical', 'Conservatorship Removal', and 'Case Management'. The 'Family Plans' option is selected. The main content area displays a table of family plans. The first row is selected, and the 'Add' button is highlighted. The table has the following data:

Date Entered	Status	Stage	Type	Description	Entered By	Event ID
01/29/2019	APRV	FSU	Family Plan	Family Plan - [redacted]	[redacted]	291792594
01/29/2019	APRV	FSU	Family Plan Evaluation	Family Plan Evaluation - [redacted]	[redacted]	291792595
12/11/2018	PRDC	FSU	Family Plan	Family Plan - [redacted]	[redacted]	291792596
12/11/2018	PRDC	FSU	Family Plan	Family Plan - [redacted]	[redacted]	291792597
07/27/2018	APRV	FSU	Family Plan	FSU's Family Plan completed 07/27/2018	[redacted]	291792598

You arrive at the new **Select FSNA for Evaluation** page, which is your first step in creating a **Family Plan Evaluation**.

The screenshot shows the 'Family Plan List' page in the IMPACT 2.0 system. The page has a navigation menu on the left with options like 'Case Summary', 'Person', 'Contacts/Summaries', 'Service Authorization', 'Legal', 'SDM Assessments', 'Family Plans', 'Medical', 'Conservatorship Removal', and 'Case Management'. The 'Family Plans' option is selected. The main content area displays a table of family plans. The first row is selected, and the 'Add' button is highlighted. The table has the following data:

Date Entered	Status	Stage	Type	Description	Entered By	Event ID
01/29/2019	APRV	FSU	Family Plan	Family Plan - Standard/Initial	Walker, Jane	291792599
01/29/2019	APRV	FSU	Family Plan Evaluation	Family Plan Evaluation - Standard/Initial	Walker, Jane	291792600
12/11/2018	PRDC	FSU	Family Plan	Family Plan - Standard/Initial	Walker, Jane	291792601
12/11/2018	PRDC	FSU	Family Plan	Family Plan - Response/Initial	Walker, Jane	291792602
07/27/2018	APRV	FSU	Family Plan	FSU's Family Plan completed 07/27/2018	Walker, Jane	291792603

# Family Plan List Page – Viewing and Editing Family Plans and Family Plan Evaluations

To view or edit an existing **Family Plan** from the **Family Plan List** page, select the hyperlink to the **Family Plan** or **Family Plan Evaluation** you wish to view.

- Whether the plan or evaluation was created in Legacy IMPACT or in IMPACT 2.0, if it is in "PROC," "COMP," or "PEND" status, then you will be redirected to the **Family Plan Detail** page or **Family Plan Evaluation** page, where you can edit the plan/evaluation
- Whether the plan or evaluation was created in Legacy IMPACT or in IMPACT 2.0, if it is in "APRV" status, you will be redirected to the **Family Plan Detail** page or **Family Plan Evaluation** page in read-only mode.

The screenshot displays the 'Family Plan List' interface. At the top, there are navigation tabs: 'My Tasks', 'Case', 'Search', 'Reports', and 'Resources'. Below these, there are sub-tabs for 'Family Plan', 'Services and Referrals Checklist', and 'Evaluation Plan'. The main content area is titled 'Family Plan List' and includes fields for 'Stage Name' and 'Case ID'. A 'Show' dropdown is set to '10 entries'. The table below lists five entries:

	Date Entered	Status	Stage	Type	Description	Entered By	Event ID
<input type="radio"/>	08/29/2019	APRV	FSJ	Family Plan	Family Plan - [redacted]	[redacted]	[redacted]
<input type="radio"/>	08/29/2019	APRV	FSJ	Family Plan Evaluation	Family Plan Evaluation - [redacted]	[redacted]	[redacted]
<input type="radio"/>	12/11/2018	COMP	FSJ	Family Plan	Family Plan - [redacted]	[redacted]	[redacted]
<input type="radio"/>	12/11/2018	PROC	FSJ	Family Plan	Family Plan - [redacted]	[redacted]	[redacted]
<input type="radio"/>	07/23/2018	APRV	FSJ	Family Plan	FSU/RE3 Family Plan completed 07/27/2018	[redacted]	[redacted]

Below the table, it says 'Showing 1 to 5 of 5 entries'. There are 'Delete', 'Add', and 'Launch Form' buttons. At the bottom, there is a 'Reports' section with a 'Reports:' label and a 'Launch' button.

# Family Plan List Page – Editing Family Plans and Family Plan Evaluations in PEND or COMP Status

1. Recognize that if you attempt to modify a **Family Plan** or **Family Plan Evaluation** created in IMPACT 2.0 that is in "PEND" or "COMP" status, when you are redirected to the **Family Plan Detail** or **Family Plan Evaluation** page you will receive an alert message: "There is an outstanding family plan approval request. Saving this page will invalidate that approval."

My Tasks Case Search Reports Resources

Case Summary Family Plan Service and Release Checked Visitation Plan

**Family Plan Detail**

Attention:  
- there is an outstanding family plan approval request. Saving this page will invalidate that approval.

Stage Name:  \* required field  
 Stage Code: TS-1 | conditionally required field  
 Cause No.:   
 Plan Type: Family Plan for Substitute Care | expand All collapse All

Primary Participant(s)

Name of Parent(s)	Relationship	Person ID
<input type="text"/>	Primary Parent	<input type="text"/>

Permanency Goal(s) Foster Care Continuity

Name of Child(ren)	Primary Permanency Goal(s)	Date to Achieve	Concurrent Permanency Goal(s)	Date to Achieve
Reggie Omela-Akett	Family Preservation	01/30/2019	Family Reunification	01/30/2019

# Family Plan List Page – Deleting Family Plans and Family Plan Evaluations in PROC Status

To delete a Family Plan or Family Plan Evaluation, it must have been created in IMPACT 2.0 and must be in PROC status.

1. Select the radio button next to the Family Plan or Family Plan Evaluation you wish to delete, and then select the **Delete** button.
2. An alert will warn: "Are you sure you want to delete the selected Family Plan?" (or Family Plan Evaluation.)
3. Select the **OK** button to delete the plan or evaluation, or the **Cancel** button to cancel.

The screenshot displays the 'Family Plan List' page in the IMPACT 2.0 system. The page includes a navigation menu on the left with categories like 'Case Summary', 'Person', 'Contacts/Summaries', 'Service Authorization', 'Legal', 'SJM Assessments', 'Medical', 'Conservatorship Removal', and 'Case Management'. The 'Family Plans' category is selected. The main content area shows a 'Family Plan List' table with columns for 'Date Initiated', 'Status', 'Stage', 'Type', 'Description', 'Initiated By', and 'Event ID'. Two entries are visible: one dated 11/19/2018 with status 'PROC' and stage 'FSU', and another dated 09/18/2018 with status 'FBID' and stage 'FSU'. A 'Delete' button is highlighted in red below the table. A confirmation dialog box titled 'Message from webpage' is overlaid on the screen, asking 'Are you sure you want to delete the selected Family Plan?' with 'OK' and 'Cancel' buttons.

Date Initiated	Status	Stage	Type	Description	Initiated By	Event ID
11/19/2018	PROC	FSU	Family Plan	Family Plan - [redacted]	[redacted]	[redacted]
09/18/2018	FBID	FSU	Family Plan	FSU/REO Family Plan completed 04/06/2018	[redacted]	[redacted]



# Family Plan List Page – You Cannot Delete a Family Plan or Evaluation if You Don't Select It

Recognize the conditions that prevent a **Family Plan** or **Family Plan Evaluation** from being deleted.

You cannot delete a plan or evaluation if you do not first select a radio button corresponding to a **Family Plan** or **Family Plan Evaluation**.

IMPACT 2.0 will generate the following alert message: "Select a Family Plan or Family Plan Evaluation to be deleted." You will have to select the **OK** button and then select a radio button to a corresponding plan or evaluation.

The screenshot shows the 'Family Plan List' page. A modal dialog box is open, displaying a warning message: "Select a Family Plan or Family Plan Evaluation to be deleted." with an "OK" button. The table below the dialog shows two entries:

Date Entered	Status	Stage	Type	Description	Entered By	Event ID
11/19/2015	PROC	FSU	Family Plan	Family Plan		
05/18/2015	FSHE	FSU	Family Plan	FSU H&G Family Plan completed 05/18/2015		

# Family Plan List Page – You Cannot Delete Family Plans and Family Plan Evaluations Initiated in Legacy IMPACT

You cannot delete a **Family Plan** or **Family Plan Evaluation** initiated in Legacy IMPACT, even if it is in "PROC" status. The radio button for these Plans are disabled, so cannot be selected.

The screenshot shows the 'Family Plan List' page in Legacy IMPACT. The table below shows several entries. The first entry has a disabled radio button (indicated by a red box) and a status of 'PROC'. The description for this entry is 'FSU RFS Family Plan completed 07/31/2017 evaluated'. Other entries have various statuses like 'A-119', 'A-PRV', and 'OOMP'.

Date Entered	Status	Stage	Type	Description	Entered By	Event ID
01/24/2019	PROC	FSU	Family Plan Evaluation	FSU RFS Family Plan completed 07/31/2017 evaluated		
01/03/2019	PROC	FSU	Family Plan	Family Plan		
11/12/2018	A-119	FSU	Family Plan	Family Plan		
01/31/2017	A-PRV	FSU	Family Plan	FSU RFS Family Plan completed 01/31/2017		
02/01/2017	A-PRV	FSU	Family Plan	FSU RFS Family Plan completed 02/01/2017		
07/31/2017	OOMP	FSU	Family Plan Evaluation	FSU RFS Family Plan completed 07/31/2017 evaluated 07/17/2018		

# Family Plan List Page – You Can Only Delete a Family Plan That Is in PROC Status Created in IMPACT 2.0

If you attempt to delete any **Family Plan** or **Family Plan Evaluation** that is in either “COMP”, “PEND” or “APRV” status, IMPACT 2.0 will generate the following alert message: “Submitted Family Plans and Family Plan Evaluations cannot be deleted. Please invalidate pending approval before deleting.”

In this scenario, you would click the **OK** button to return to the **Family Plan** or **Family Plan Evaluation**, and then invalidate the plan approval process, which returns it to “PROC” status so it can be deleted.

The screenshot shows the 'Family Plan List' page in the IMPACT 2.0 system. A modal message box is overlaid on the page, displaying a yellow warning triangle and the text: 'Submitted Family Plans and Family Plan Evaluations cannot be deleted. Please invalidate pending approval before deleting.' The message box has an 'OK' button at the bottom right. The background page shows a table of family plans with columns for Date Entered, Status, Stage, Type, Description, Entered By, and Event ID. The table contains six rows of data. The third row is selected, showing a status of 'PEND' and a stage of 'FSU'. The page also includes a sidebar with navigation options like 'Case Summary', 'Person', and 'Family Plans', and a top navigation bar with 'My Tasks', 'Case', 'Search', 'Reports', and 'Resources'.

Date Entered	Status	Stage	Type	Description	Entered By	Event ID
01/16/2019	APRV	FSU	Family Plan	Family Plan - [redacted]	[redacted]	[redacted]
01/05/2019	PROC	FSU	Family Plan	Family Plan - [redacted]	[redacted]	[redacted]
12/19/2018	PEND	FSU	Family Plan	Family Plan - [redacted]	[redacted]	[redacted]
12/17/2018	COMP	FSU	Family Plan Evaluation	Family Plan Evaluation [redacted]	[redacted]	[redacted]
12/11/2018	APRV	FSU	Family Plan	Family Plan [redacted]	[redacted]	[redacted]
09/12/2018	APRV	FSU	Family Plan	FSU RES Family Plan completed 09/12/2018	[redacted]	[redacted]



Texas Department of  
**Family and Protective Services**

Family Plan of Service Family Substitute Care  
(FSU) and Family Reunification (FRE) –  
FSNA Page

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# Select FSNA Page – Introduction



When you select **Add** on the **Family Plan List** page to create a **Family Plan**, you will arrive at the **Select FSNA** page.

The **Family Plan** you are creating will have designated fields that are prefilled from information in the **FSNA**. Therefore, a valid approved **FSNA** must exist.

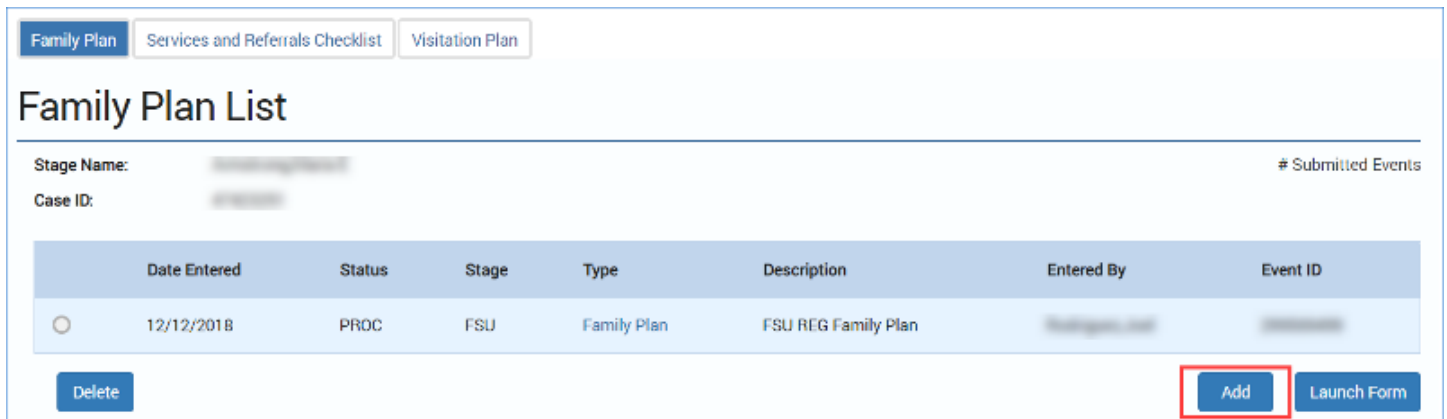
The **Select FSNA** page is a new page in IMPACT 2.0 displaying all the approved and valid **FSNAs** within the stage you are working.

**Stages Impacted:** FSU, FRE

## Select FSNA Page – Accessing and Using the Page

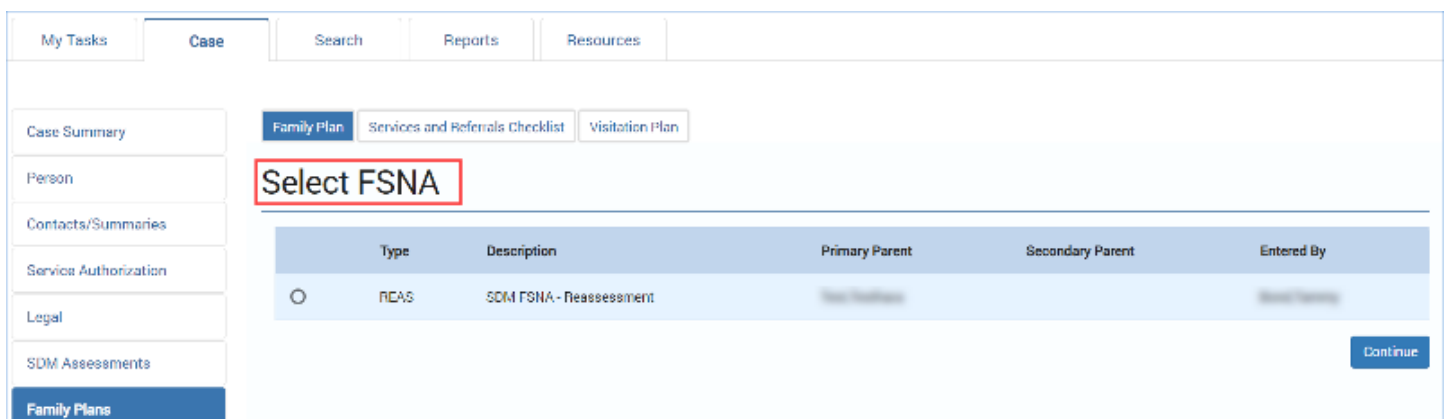
Follow these steps to access and use the **Select FSNA** page:

1. Select the **Add** button on the **Family Plan List** page to create a new **Family Plan**.



The screenshot shows the "Family Plan List" page. At the top, there are three tabs: "Family Plan" (selected), "Services and Referrals Checklist", and "Visitation Plan". Below the tabs, the page title "Family Plan List" is displayed. Underneath, there are fields for "Stage Name:" and "Case ID:". To the right of "Stage Name:" is a link "# Submitted Events". Below these fields is a table with the following columns: "Date Entered", "Status", "Stage", "Type", "Description", "Entered By", and "Event ID". The table contains one row with the following data: "12/12/2018", "PROC", "FSU", "Family Plan", "FSU REG Family Plan", and two blurred names. Below the table, there are three buttons: "Delete", "Add" (highlighted with a red box), and "Launch Form".

2. You will arrive at the **Select FSNA** page.



The screenshot shows the "Select FSNA" page. At the top, there are five tabs: "My Tasks", "Case" (selected), "Search", "Reports", and "Resources". Below the tabs, there is a sidebar on the left with the following items: "Case Summary", "Person", "Contacts/Summaries", "Service Authorization", "Legal", "SDM Assessments", and "Family Plans" (selected). The main content area has three tabs: "Family Plan" (selected), "Services and Referrals Checklist", and "Visitation Plan". Below the tabs, the page title "Select FSNA" is displayed and highlighted with a red box. Underneath, there is a table with the following columns: "Type", "Description", "Primary Parent", "Secondary Parent", and "Entered By". The table contains one row with the following data: "FCAS", "SDM FSNA - Reassessment", and two blurred names. Below the table, there is a "Continue" button.

3. Examine the **Select FSNA** page and the listed **FSNAs**. Recognize:
  - Only valid **FSNAs** in the stage in which you are working are displayed.
  - The **FSNAs** are sorted by approval date. The **FSNA** with the most recent date is displayed at the top of the list.
4. Select the radio button for the desired **FSNA**.
5. Select the **Continue** button, which will redirect you to the **Family Plan Detail** page with designated fields prefilled from the **FSNA** you selected.

The screenshot shows the 'Select FSNA' page with three tabs: 'Family Plan', 'Services and Referrals Checklist', and 'Visitation Plan'. The 'Family Plan' tab is active. Below the tabs is the heading 'Select FSNA'. A table with the following columns is displayed: Type, Description, Primary Parent, Secondary Parent, and Entered By. One row is selected, with a red box around the radio button in the 'Type' column. The row contains: REAS, SDM FSNA - Reassessment, [blurred], [blurred], and [blurred]. A 'Continue' button is located at the bottom right of the table area, also highlighted with a red box.

## Select FSNA Page – Validation Checks

IMPACT 2.0 will perform validation checks to ensure the **FSNA** you select for your Family Plan is a valid FSNA.

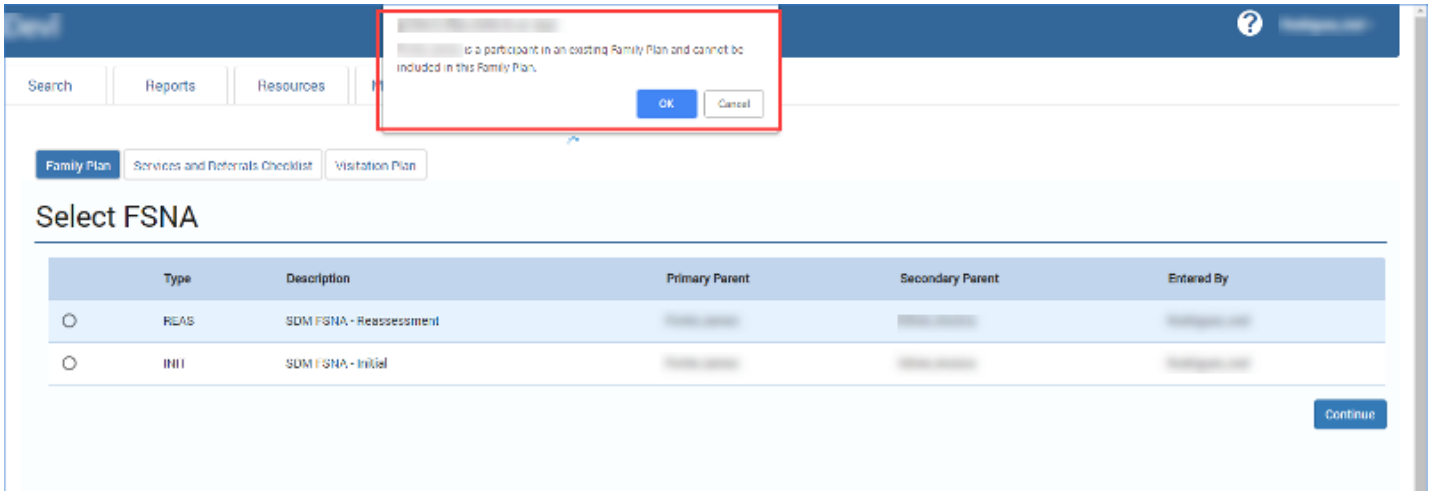
## Select FSNA Page – Validation Error Message – Both Parents Are Participants on Another Plan

IMPACT 2.0 checks to see if either the **Primary Parent** and/or **Secondary Parent** are participants in another **Family Plan** in any status, with a **Plan Completed/Conference Date** that is post-release of IMPACT 2.0. If so, the system will prevent creation of another **Family Plan**.

The screenshot shows the 'Select FSNA' page with the same tabs as the previous image. A red error message box is displayed at the top, containing the text: 'Your information contains 1 error(s)' followed by a bullet point: 'New Family Plan cannot be created as the Primary and Secondary Parent on the selected FSNA are a part of another Family Plan.' Below the error message is the same table as in the previous image, with the 'REAS' row selected. The 'Continue' button is visible at the bottom right.

# Select FSNA Page – Validation Error Message – One Parent Is a Primary Participant on Another Plan

IMPACT 2.0 also checks to see if either the **Primary Parent** or **Secondary Parent** is a **Primary Participant** in another **Family Plan** in any status, and has a **Plan Completed/Conference Date** that is post-release of IMPACT 2.0. If so, then the system won't include that participant on the plan you are creating. However, it will allow you to create a **Family Plan** with the other participant.



The screenshot shows a web application interface for selecting a Family Service Network Assessment (FSNA). A red box highlights a validation error message that appears when a parent is already a primary participant in another family plan. The message reads: "is a participant in an existing Family Plan and cannot be included in this Family Plan." Below the message are "OK" and "Cancel" buttons. The main page content includes a navigation bar with "Search", "Reports", and "Resources" tabs. Below the navigation bar are tabs for "Family Plan", "Services and Referrals Checklist", and "Visitation Plan". The "Family Plan" tab is active, and the page title is "Select FSNA". A table with the following columns is displayed: "Type", "Description", "Primary Parent", "Secondary Parent", and "Entered By". The table contains two rows: one for "REAS" (SDM FSNA - Reassessment) and one for "INIT" (SDM FSNA - Initial). A "Continue" button is located at the bottom right of the table.

Type	Description	Primary Parent	Secondary Parent	Entered By
<input type="radio"/>	REAS	SDM FSNA - Reassessment		
<input type="radio"/>	INIT	SDM FSNA - Initial		



Texas Department of  
**Family and Protective Services**

Family Plan of Service Family Substitute Care  
(FSU) and Family Reunification (FRE) –  
Family Plan Detail Page



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# Family Plan Detail Page – Creating & Completing a Family Plan

After selecting the **FSNA** for your **Family Plan** and selecting **Continue** from the **Select FSNA** page, you will arrive at the **Family Plan Detail** page.

The **Family Plan Detail** page will have fields prefilled from the most recent approved and valid **FSNA** selected from the **Select FSNA** page where a parent selected in the **Family Plan** matches either one or both the **Primary Parent** or **Secondary Parent** in the **FSNA**.

You can modify some of the prefilled fields, and also add a **Needs Domain**, **Required Action**, and **Resource** as needed for each parent and child.

You will also be able to launch a **Family Plan** form from the **Family Plan Detail** page as well as download if desired. This new form features *electronic signature* capabilities!

**Stages Impacted:** FSU, FRE

---

## Family Plan Detail Page – Create a Family Plan

---

1. Select the **Add** button on the **Family Plan List** page.
2. Select a valid approved **FSNA** from the **Select FSNA** page, then select the **Continue** button.
3. You will arrive at the **Family Plan Detail** page.

Congratulations! You've created a new **Family Plan**!

- Case Summary
- Person
- Consent/Summaries
- Service Authorization
- Legal
- CDAP Assessments
- Family Plans**
- Medical
- Cooperation/Referral
- Case Management

Family Plan
Services and Referrals Overview
Verification Plan

### Family Plan Detail

**Attention:**  
Plan Completion/Confidence Rate and Risk Profile that will be updated once Provider Case Dashboard is completed

**Plan Details:**  
 Plan Name: [Text]  
 Plan Type: Family Plan for Non-Substance Use  
 Status: [Text] [Status Icon]

**Primary Participant(s)**

Name of Participant	Relationship	Person ID
[Text]	Primary Parent	[Text]

**Permanency Goal(s)**

Name of Goal(s)	Priority Permanency Goal(s)	Link to Action
[Text]	[Text]	[Text]

**Plan Dates**

Plan Change/Conference Date: [Text] [Add Member Date]  
 Current Conference/Conference Date: [Text] [Add Conference]

**Additional Participant(s)**

Name of Participant	Type	Age	Gender	Relationship	Person ID
[Text]	[Text]	[Text]	[Text]	[Text]	[Text]

**Other Participant(s)**

[Text]

**Child(ren) Strengths And Needs:**

- 1. Physical Health/Physical Disability - Strength/No Needs Identified [Text]
- 2. Social Development - Strength/No Needs Identified [Text]
- 3. Education - Strength/No Needs Identified [Text]
- 4. Emotional/Behavioral Health - Strength/No Needs Identified [Text]
- 5. Family Relationships - Strength/No Needs Identified [Text]
- 6. Placement of Child Family Relationships - Strength/No Needs Identified [Text]
- 7. Subsequent/Childhood Subsequent - Strength/No Needs Identified [Text]
- 8. Identified Child Strength/Need (Not Covered in Item 1-6) - Strength/No Needs Identified [Text]

**Parent(s) Strengths:**

- 1. Resource Management/Health Needs - Strength/No Needs Identified [Text]
- 2. Parenting Skills - Strength/No Needs Identified [Text]
- 3. Social Support System - Strength/No Needs Identified [Text]
- 4. Other Adult Household Relationships - Strength/No Needs Identified [Text]
- 5. Physical Health - Strength/No Needs Identified [Text]
- 6. Housing Status/Health - Strength/No Needs Identified [Text]

**Parent(s) Needs and Actions to Address:**

Parent/Why Statement: [Text]

Additional Information: [Text]

Case Statement: [Text]

Additional Information: [Text]

**Parent(s) Needs:**

- Cognitive Abilities**
- Text: [Text] [Start Order]
- Required Action: [Text]
- Target Date/Completion: [Text] [Priority/Status]
- Resource: [Text] [Event Calendar]
- Resource Name: [Text] [Resource Phone]
- Resource Address 1: [Text] [Resource City]
- Resource Address 2: [Text] [Zip]

- Substance Abuse/Use**
- Text: [Text] [Start Order]
- Required Action: [Text]
- Target Date/Completion: [Text] [Priority/Status]
- Resource: [Text] [Event Calendar]
- Resource Name: [Text] [Resource Phone]
- Resource Address 1: [Text] [Resource City]
- Resource Address 2: [Text] [Zip]
- Intimate Partner Violence**
- Text: [Text] [Start Order]
- Required Action: [Text]
- Target Date/Completion: [Text] [Priority/Status]
- Resource: [Text] [Event Calendar]
- Resource Name: [Text] [Resource Phone]
- Resource Address 1: [Text] [Resource City]
- Resource Address 2: [Text] [Zip]

**Child(ren) Needs and Actions to Address:**

Has the parent(s) participated and signed?  Yes  No

Parent(s) comments and/or concerns regarding the Family Plan: [Text]

Notes of Contact: [Text] [Text]

[Save] [Cancel and Log Out]

---

## Family Plan Detail Page – Prefilled Fields

---

1. Read the informational message as follows: "Attention: The Plan Completed/Conference Date and next review due will be enabled once the Foster Care Candidacy is completed."
2. Recognize the fields prefilled by IMPACT 2.0 (**Stage Name, Stage Code, Cause Number** and **Plan Type**)
3. If the **FSNA** was approved with exception, then it will display "No Information Found in Family Strengths and Needs Assessment" in various fields on the **Family Plan**.
4. Locate the fields prefilled from the **FSNA (Name of Parent, Relationship, Person ID, and Names of Child(ren))**. In addition, information from the **FSNA** prefills portions of the following sections: **Child(ren) Strengths and Needs, Parent(s) Strengths, Parent Needs and Actions to Address** and **Parent(s) Needs**.
5. The **Month/Year of Next Review** in the **Plan Dates** section will prefill based on user entry on the **Plan Completed/Conference Dates** field.
6. Recognize which fields are editable vs. those that are not.



**Note:** The **Cause Number** is prefilled with the most recent legal status on the case. If there is no legal status, the field will be blank.

Case Summary

Person

Consent/Authorization

Service Authorization

Legal

ICD Assessments

**Family Plans**

Medical

Consent/Authorization Removal

Case Management

Family Plan
Services and Referrals Checklist
Checklist Page

### Family Plan Detail

**Attention:**

Plan Completed/Conference Date and Next Review Date will be updated once Provider Care Summary is completed.

**Plan Completed** \*Required  
 **Next Review** \*Conditionally Required  
 **Plan Type**

Family Plan for Reauthorization

---

**Primary Participant(s)**

Name of Participant(s)	Relationship	Participant ID
[Name]	Primary Parent	[ID]

---

**Permanency Goal(s)**

Name of Goal(s)	Priority Permanency Goal	Date to Address
[Goal]	Not Applicable	[Date]

---

**Plan Dates**

**Plan Completed/Conference Date** \*Next Review Date  
 **Next Review Date** \*Next Conference

---

**Additional Participant(s)**

Name of Participant(s)	Type	Age	Gender	Relationship	Participant ID
[Name]	[Type]	[Age]	[Gender]	[Relationship]	[ID]

---

**Child(ren) Strengths And Needs**

- Physical Health/Physical Disability - Strengths/Needs Identified
- Mental Development - Strengths/Needs Identified
- Education - Strengths/Needs Identified
- Emotional/Behavioral Health - Strengths/Needs Identified
- Family Relationships - Strengths/Needs Identified
- Placement or Best Family Relationship - Strengths/Needs Identified
- Substance/Alcohol/Other - Strengths/Needs Identified
- Identified Child Strengths/Needs (Not Covered in Item 1-7) - Strengths/Needs Identified

Additional Information:

---

**Parent(s) Strengths**

- Resource Management/Basic Needs - Strengths/Needs Identified
- Supporting Goals - Strengths/Needs Identified
- Support Support System - Strengths/Needs Identified
- Other Adult Household Relationships - Strengths/Needs Identified
- Physical Health - Strengths/Needs Identified
- Coping Skills/Related Health - Strengths/Needs Identified

Additional Information:

Safety Related and Community Supports:

---

**Parent(s) Needs and Actions to Address**

Danger/Worry Statements:

Additional Information:

Goal Statements:

Additional Information:

Does this parent require additional supportive services or assistance in order to accomplish the needs in the Family Plan of Service?

Yes  No

---

**Parent(s) Needs**

**Cognitive Abilities**

Target Date/Completion: [Date]  **Priority/Status:** [Status]  **Client Release:**

Reference Name: [Name]  **Reference Phone:** [Phone]  **Reference City:** [City]  **Reference State:** [State]

Reference Address I: [Address]  **Reference City:** [City]  **Reference State:** [State]

Reference Address II: [Address]

---

**Substance Abuse/Use**

Target Date/Completion: [Date]  **Priority/Status:** [Status]  **Client Release:**

Reference Name: [Name]  **Reference Phone:** [Phone]  **Reference City:** [City]  **Reference State:** [State]

Reference Address I: [Address]  **Reference City:** [City]  **Reference State:** [State]

Reference Address II: [Address]

---

**Intimate Partner Violence**

Target Date/Completion: [Date]  **Priority/Status:** [Status]  **Client Release:**

Reference Name: [Name]  **Reference Phone:** [Phone]  **Reference City:** [City]  **Reference State:** [State]

Reference Address I: [Address]  **Reference City:** [City]  **Reference State:** [State]

Reference Address II: [Address]

---

**Child(ren) Needs and Actions to Address:**

Does this parent(s) participate and sign?  Yes  No

Parent(s) comments and/or concerns regarding the Family Plan:

Notes of Contact: [Text]  **Telephone:** [Phone]  **Mail:** [Address]

# Family Plan Detail Page – Save vs. Save and Submit

1. Locate the **Save** button. Selecting this button saves your work but does not submit the plan for supervisor approval.
2. Locate the **Save and Submit** button. Selecting the button will save the **Family Plan** and submit it for approval.

The screenshot displays the 'Family Plan Detail' page in the Dev1 system. The page is divided into several sections:

- Case Information:** Includes fields for Stage Name, Stage Code, Case No., and Plan Type.
- Primary Participant(s):** A table with columns for Name of Parent(s), Relationship, and Person ID. One entry is visible for 'Torre, Jessica' with relationship 'Primary Parent' and Person ID '70702804'.
- Permanency Goal(s):** A table with columns for Name of Child(ren), Permanency Goal(s), Date to Fullness, Current Permanency Goal(s), and Date to Fullness. One entry is visible for 'Torre, Jessica' with goal 'Not applicable'.
- Plan Dates:** Includes fields for Case Completed/Conference Date, Current Review/Conference Date, Next Review Date, and PSDM Conference.
- Additional Participant(s):** A table with columns for Name of Participant(s), Type, Age, Gender, Relationship, and Person ID. One entry is visible for 'Torre, Jessica'.
- Other Participant(s):** A text area for additional participants.
- Child(ren) Strengths And Needs:** A text area for child strengths and needs.
- Parent(s) Strengths:** A text area for parent strengths.
- Parent(s) Needs and Actions to Address:** A text area for parent needs and actions.
- Parent(s) Needs:** A text area for parent needs.
- Parent(s) Comments and/or concerns regarding the Family Plan:** A text area for parent comments.
- Parent of Contact:** A dropdown menu for selecting the parent of contact.
- Buttons:** At the bottom right, there are two buttons: 'Save' and 'Save and Submit', both highlighted with red boxes.

# Family Plan Detail Page – Validation Checks and Error Messages on Save and Submit

IMPACT 2.0 will perform validation checks to ensure correct information has been provided in all required fields for a successful **Save & Submit**. Should the system encounter any validation errors, it will generate error message(s) listing any/all errors at the top of the page, while preventing submission of the plan.

Family Plan
Services and Referrals Checklist
Validation Plan

### Family Plan Detail

● **Your information contains 13 error(s)**

- Plan Completed/Conference Date: Field is required. Please enter a value.
- Next Review Date: Field is required. Please enter a value.
- Does the parent require additional supportive services or assistance in order to accomplish the tasks in the Family Plan of Service?: Please choose Yes or No.
- Target Date/Completed: Field is required. Please enter a value.
- Priority/Status: Field is required. Please enter a value.
- Required Action: Field is required. Please enter a value.
- Target Date/Completed: Field is required. Please enter a value.
- Priority/Status: Field is required. Please enter a value.
- Required Action: Field is required. Please enter a value.
- Target Date/Completed: Field is required. Please enter a value.
- Priority/Status: Field is required. Please enter a value.
- Target Date/Completed: Field is required. Please enter a value.
- Priority/Status: Field is required. Please enter a value.
- Target Date/Completed: Field is required. Please enter a value.
- Priority/Status: Field is required. Please enter a value.

Stage Name:  \*required field

Stage Code: FSJ ↑ conditionally required field

Course No:

Plan Type: Family Plan for Substitute Care Required All Collapse All

#### Primary Participant(s)

Name of Parent(s)	Relationship	Person ID
<input type="text"/>	Primary Parent	<input type="text"/>

#### Permanency Goal(s) Protekt Care Custody

Name of Child(ren)	Primary Permanency Goal(s)	Date to Achieve	Concurrent Permanency Goal(s)	Date to Achieve
<input type="checkbox"/> <input type="text"/>	Not Applicable	<input type="text"/>	Not Applicable	<input type="text"/>

# Completing a Family Plan – Selecting Primary Participants

1. In the **Primary Participants** list, view the prefilled name of a **Primary Parent**, and if appropriate, **Secondary Parent**. You will not be able to add **Primary Participants** on the **Family Plan Detail** page after the **Family Plan** has been prefilled from the **FSNA**.
2. Once the participants have been prefilled from the valid and approved **FSNA**, you will have the ability to delete one (and only one) **Primary Participant** from the plan. The plan must have at least one **Primary participant**.

The screenshot displays the 'Family Plan Detail' interface. At the top, there are tabs for 'Family Plan', 'Services and Policies Checklist', and 'Withdraw Plan'. Below the tabs, the page title 'Family Plan Detail' is shown. An 'Attention:' banner contains a message: 'Plan Completed/Confirms Date and Next Review Due will be enabled once Foster Care Guardianship is completed.' Below this, there are fields for 'Stage Name', 'Stage Code' (FSU), 'Cause No.', and 'Plan Type' (Family Plan for Substitute Care). A 'Delete' button is highlighted with a red box. A modal dialog box titled 'Message from webpage' is open, asking 'Are you sure you want to delete [redacted] from the plan?' with 'OK' and 'Cancel' buttons. Below the dialog, there is a table for 'Primary Participant(s)' with columns for 'Name of Parent(s)' and 'Person ID'. A 'Delete' button is also highlighted with a red box. At the bottom, there is a section for 'Permanency Goal(s)' with a table containing columns for 'Name of Child(ren)', 'Primary Permanency Goal(s)', 'Date to Achieve', 'Discontinued Permanency Goal(s)', and 'Date to Achieve'. A 'Delete' button is also present at the bottom left.



# Completing a Family Plan – Selecting Child(ren) Permanency Goal(s)

The **Permanency Goal(s)** list prefills all children assessed from the associated valid and approved **FSNA**. Once the children assessed have been prefilled, you can delete children from the **Permanency Goal(s)** section. You can only delete a child(ren) with no open **SUB** stage.

For **FSU**:

- For every child with an open **SUB** stage, you will need to choose a **Primary Permanency Goal** and **Concurrent Permanency Goal** as well as enter the **Date to Achieve** for each goal.
- For children without a **SUB** stage, "Not Applicable" will prefill for **Primary Permanency Goal** and **Concurrent Permanency Goal**. In addition, the **Date to Achieve** field is disabled.

Family Plan
Services and Referrals Checklist
Visitation Plan

### Family Plan Detail

**Attention:**

• Plan Completed/Conference Date and Next Review Due will be enabled once Foster Care Candidacy is completed.

Stage Name:  \*required field

Stage Code: FSU \*conditionally required field

Cause No.:

Plan Type: Family Plan for Substitute Care Expand All Collapse All

---

**Primary Participant(s)**

Name of Parent(s)	Relationship	Person ID
<input type="radio"/> <input type="text"/>	Primary Parent	<input type="text"/>
<input type="radio"/> <input type="text"/>	Secondary Parent	<input type="text"/>

---

**Permanency Goal(s)** Foster Care Candidacy

Name of Child(ren)	Primary Permanency Goal(s)	Date to Achieve	Concurrent Permanency Goal(s)	Date to Achieve
<input type="text"/>	<input style="background-color: #e6f2ff; border: 1px solid #ccc; width: 100%;" type="text"/>	<input style="width: 50%;" type="text"/>	<input style="background-color: #e6f2ff; border: 1px solid #ccc; width: 100%;" type="text"/>	<input style="width: 50%;" type="text"/>

For **FRE**:

- For every child with an open **SUB** stage, the **Primary Permanency Goal** of "Family Reunification" will be prefilled and not editable. The **Date to Achieve** field is required for you to complete.
- For children without a **SUB** stage, "Not Applicable" will prefill for **Primary Permanency Goal**. In addition, the **Date to Achieve** field is disabled.

### Family Plan

**Attention:**

- Current Review/Re-Conference Date and Next Review Due will be enabled once Foster Care Candidacy is completed.

Stage Name:  \* required field

Stage Code: FRE ‡ conditionally required field

Cause No:

Plan Type: Family Plan Expand All Collapse All

---

**Primary Participant(s)**

	Name of Parent(s)	Relationship	Person ID
<input type="radio"/>	<input type="text"/>	Secondary Parent	<input type="text"/>
<input type="radio"/>	<input type="text"/>	Primary Parent	<input type="text"/>

---

**Permanency Goal(s)** Foster Care Candidacy

Name of Child(ren)	Primary Permanency Goal(s)	Date to Achieve
<input type="text"/>	Family Reunification	<input type="text"/> <input type="button" value="📅"/>

## Completing a Family Plan – The Select Additional Participants Page

1. Select the **Select Participants** button to generate the **Select Additional Participants** page in a separate pop-up window.
2. Recognize the participants listed on this pop-up page are populated from the stage **Person List** page, with the exception of the primary participants and children already listed on the **Family Plan**, as well as any additional participants already added to the plan.
3. Select the checkbox next to a participant's name and then select the **Save and Continue** button to return to the **Family Plan Detail** page. The selected participant(s) is added to the **Additional Participant(s)** section of the **Family Plan Detail** or **Family Plan Evaluation** page.
4. You may also add participants not listed on the plan or evaluation within the textbox for **Other Participants**.
5. Locate the **Foster Care Candidacy** link to the right of the **Permanency Goal(s)** heading. This link will redirect you to the **Foster Care Candidacy** page.

The screenshot shows a web interface with a 'Permanency Goal(s)' section containing a 'Foster Care Candidacy' link. Below it is a 'Select Additional Participants' pop-up window. This window contains a table with columns: Name of Participant(s), Type, Age, Gender, Rel/Int, and Person ID. Three rows are visible, each with a checkbox. Below the table are 'Cancel' and 'Save and Continue' buttons. Below the pop-up is the 'Additional Participant(s)' section, which also contains a table with columns: Name of Participant(s), Type, Age, Gender, Relationship, and Person ID. Two rows are visible, each with a checkbox. Below this table are 'Delete' and 'Select Participant(s)' buttons.

Name of Participant(s)	Type	Age	Gender	Rel/Int	Person ID
<input type="checkbox"/>	PRN	47	F	Aunt/Uncle	
<input type="checkbox"/>	PHN	45	M	Aunt/Uncle	
<input type="checkbox"/>	RTF	54	M		

Name of Participant(s)	Type	Age	Gender	Relationship	Person ID
<input type="checkbox"/>	PRN	33	F	Parent	
<input type="checkbox"/>	COL		M	Law Enforcement	

## Deleting Participants and Child(ren)

The **Primary Participants**, **Permanency Goal(s)**, and **Additional Participants** sections each have the ability to delete participants.

1. Locate the **Delete** buttons for each section.
2. Select the radio buttons for the participant(s) you wish deleted from the plan, and then select that section's **Delete** button.
3. Another way to delete additional participants is by de-selecting their checkboxes from the **Select Additional Participants** page and then selecting the **Save and Continue** button. You will be returned to the **Family Plan Detail** page and those participants will have been deleted from your plan.



**Note:** For **Primary Participant(s)**, the **Delete** button will display only if more than one Primary Participant is displayed on the plan. If there is more than one Primary Participant on the plan, and you delete one, the **Delete** button will no longer display, as the plan must have at least one (1) Primary Participant.

Family Plan Detail

Attention:  
- Plan Completed/Conference Date and Next Review Due will be enabled once Foster Care Candidacy is completed.

Stage Name: [redacted] \* required field  
Stage Code: FSU ↓ conditionally required field  
Case No: [redacted]  
Plan Type: Family Plan for Substitute Care Expand All Collapse All

Primary Participant(s)

	Name of Parent(s)	Relationship	Person ID
<input type="radio"/>	[redacted]	Primary Parent	[redacted]
<input type="radio"/>	[redacted]	Secondary Parent	[redacted]

## Completing the Family Plan – Plan Dates

1. Select a date from the date selector, or enter a date, for **Plan Completed/Conference Date**. This date cannot be a date prior to the start of the stage in which you are working.
2. The **Next Review Due** field prefills with a date 120 days after the date you entered for **Plan Completed/Conference Date**, but the field is editable.
3. The **FGDM Conference** dropdown defaults to "Not Applicable." Select the appropriate response if different.
4. The **Current Review/Re-Conference Date** field is disabled for **Family Plans**. It is enabled only for **Family Plan Evaluations**.

Plan Dates

* Plan Completed/Conference Date:	<input type="text" value="01/09/2019"/> <input type="button" value="Calendar"/>	* Next Review Due:	<input type="text" value="05/09/2019"/> <input type="button" value="Calendar"/>
Current Review/Re-conference Date:	<input type="text"/>	* FGDM Conference:	<input type="text" value="Not Applicable"/>

## Completing the Family Plan – Prefilled Fields vs. Fill In

Although many of the fields of the **Family Plan** are prefilled from the **FSNA**, there are others in which you must enter information.

1. Enter information for Hopes and Dreams for Child(ren).
2. Locate the Child(ren) Strengths and Needs and Parent(s) Strengths, and recognize these fields are prefilled from the FSNA. However, you can also provide additional information in the Additional Information textbox.

The screenshot displays a web form with several sections highlighted by red boxes:

- Hopes and Dreams for Child(ren):** A large, empty text input area at the top.
- Child(ren) Strengths And Needs:** A dropdown menu that is currently expanded, showing a list of categories with "test data" as a placeholder for each:
  - 3. Education : Strengths/No Needs Identified
  - 4. Emotional/Behavioral Health : Strengths/No Needs Identified
  - 5a. Family Relationships : Strengths/No Needs Identified
  - 9. Preparation for Adulthood : Strengths/No Needs Identified
  - 10. Identified Child Strength/Need (Not Covered in item 1-9) : Strengths/No Needs Identified
- Additional Information:** A large, empty text input area at the bottom.

3. Locate the field for **Safety Network and Community Supports** and recognize the designated textbox is not prefilled from the **FSNA**; however, it is a required field.
4. Locate the fields for **Danger/Worry Statements** and **Goals Statements** and recognize these fields are prefilled from the **FSNA**. However, you can also provide additional information in the **Additional Information** textboxes.

▶ Parent(s) Strengths:

\* Safety Network and Community Supports:

▼ Parent(s) Needs and Actions to Address:

Danger/Worry Statements:

Additional Information:

Goal Statements:

Additional Information:

---

## Completing the Family Plan – Conditionally Displayed Fields for Additional Supportive Services and Assistance for Parents

---

1. Locate the field "Does the parent require additional supportive services or assistance in order to accomplish the tasks in the Family Plan of Service?"
2. Recognize that all **Primary Participants** are listed, with corresponding "Yes" and "No" radio buttons.
3. Recognize that selecting the "Yes" radio button triggers a conditionally displayed field: "Describe the additional supportive services or assistance that will be provided to the parent." Once triggered, the field is required and it must be completed.

▼ Parent(s) Needs and Actions to Address:

Danger/Worry Statements:

Additional Information:

Goal Statements:

Additional Information:

Does the parent require additional supportive services or assistance in order to accomplish the tasks in the Family Plan of Service?

Yes     No

Yes     No

Describe the additional supportive services or assistance that will be provided to the parent:

---

## Completing the Family Plan – Parent(s) Needs

---

1. Locate the **Parent(s) Needs** section. This section prefills with only those **Needs Domain** names and their accompanying text that are marked as "Needs Identified" in the associated FSNA. Domain names are:
  - Resource Management/Basic Needs
  - Parenting Skills
  - Social Support System: Non-Household
  - Intimate Partner Violence
  - Other Adult Household Relationships
  - Physical Health
  - Cognitive Abilities
  - Coping Skills/Mental Health

- Substance Abuse/Use
  - Other
2. Provide the required information for the **Required Actions** fields of each **Needs Domain**, as well as their corresponding fields:
    - **Target Date/Completed**: Provide a date or select one from the **Date Selector**.
    - **Priority/Status**: Select an option from the dropdown: "Initial," "Subsequent," "Ongoing," or "Completed."
  3. Select the checkbox for **Court Ordered** if the **Required Action** is court-ordered.
  4. Recognize each of your **Needs Domains** has corresponding **Resource** fields.



**Family Plan Detail**

**Attention:**  
Plan Overview and Overview Summary Panel System Use will be available in the next version of the system.

**Participant Information:**  
Participant ID: [Redacted]    Participant Name: [Redacted]    Participant Address: [Redacted]    Participant City: [Redacted]    Participant State: [Redacted]    Participant Zip: [Redacted]    Participant Birth Date: [Redacted]    Participant Gender: [Redacted]

**Primary Participant(s)**

Name / Participant ID	Relationship	Participant ID
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]

**Formal Primary Care(s)**    **Primary Care Condition**

Name of Condition	Participant ID	Name of Condition	Participant ID
[Redacted]	[Redacted]	[Redacted]	[Redacted]

**Plan Dates**

Plan Start Date: [Redacted]    Plan End Date: [Redacted]    Plan Renewal Date: [Redacted]    Plan Renewal Frequency: [Redacted]

**Additional Participants**

Name / Participant ID	Type	Sex	Birth Date	Relationship	Participant ID
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

**Children's Strengths and Needs**

**Children's Strengths**

**Children's Needs and Actions to Address**

**Therapy Needs**

**Therapy Services**

**Cognitive Abilities**

Language: [Redacted]

Reading: [Redacted]

Writing: [Redacted]

Math: [Redacted]

Science: [Redacted]

History: [Redacted]

Art: [Redacted]

Music: [Redacted]

Physical Education: [Redacted]

Other: [Redacted]

**Therapy Goals**

[Redacted]

**Therapy Notes**

[Redacted]

**Therapy Status**

[Redacted]

**Therapy Location**

[Redacted]

**Therapy Dates**

[Redacted]

**Therapy Frequency**

[Redacted]

**Therapy Duration**

[Redacted]

**Therapy Type**

[Redacted]

**Therapy Provider**

[Redacted]

**Therapy Cost**

[Redacted]

**Therapy Insurance**

[Redacted]

**Therapy Referral**

[Redacted]

**Therapy Consent**

[Redacted]

**Therapy Approval**

[Redacted]

**Therapy Review**

[Redacted]

**Therapy Update**

[Redacted]

---

## Completing the Family Plan – Adding a Needs Domain, Required Action and Resource for Parents

---

1. At the bottom of the section for each **Parent(s) Needs**, locate the **Add Domain** button. This is where you would add an additional **Needs Domain**.
2. When you add a **Needs Domain**, you must select an option from the dropdown for **Reason for Addition**: "New Information," "No FSNA Required," or "Court Ordered."
3. When you add a **Needs Domain**, it triggers corresponding fields to appear for **Required Action** and for **Resource**. You must complete these fields for every **Needs Domain** added.



**Note:** A **Needs Domain** that exists for a **Parent** on the **Family Plan Detail** page cannot be added to the page for the same person. The **Add Domain** dropdown will only display those **Needs Domains** that are not listed on the current **Family Plan Detail** page for the same person.

4. Locate the **Resource Search** button. Selecting this button performs a search for resources for a manually added **Needs Domain** and **Required Action**. Although you will be redirected to the **Resource Search** page, your information on the **Family Plan** will be retained.
5. When adding an additional resource, locate the **Add Resource** button. This generates another **Resource** section, including its corresponding **Resource Search** button.
6. When adding an additional required action, locate the **Add Required Actions** button. Selecting this button opens another text box that will require information on additional **Required Actions**.



**Note:** **Resource** can be manually entered without selecting the **Resource button** by directly adding information in the **Resource related fields**.

## Completing the Family Plan – Children(s) Needs and Actions to Address (For FRE Only)

1. Locate the Child(ren) Needs and Actions to Address section.
2. The section prefills with the name(s) of the child(ren) who have Children Assessed checkbox(es) selected in the associated FSNA. All children will display in this section whether or not they have an identified need.
3. The Needs Domains and corresponding fields will not be displayed unless you manually add a domain to this section of the Family Plan. Domain names are:
  - **Physical Health/ Physical Disability**
  - **Child Development**
  - **Education**
  - **Emotional/Behavior Health**
  - **Family Relationships**
  - **Placement or Staff Family Relationships**
  - **Peer Relationships**
  - **Substance Use/Abuse**
  - **Delinquent/Criminal Behavior**
  - **Preparation for Adulthood**
  - **Other**
4. When you add a **Needs Domain**, it triggers corresponding fields to appear for **Required Action** and for **Resource**. You must complete these fields for every **Needs Domain** added.

5. Every **Needs Domain** must have at least one **Required Action** associated with it.
6. Provide the required information for the **Required Actions** fields of each **Needs Domain**, as well as their corresponding fields:
  - **Target Date/Completed**: Provide a date or select one from the date selector.
  - **Priority Status**: Select an option from the dropdown: "Initial," "Subsequent," "Ongoing," or "Completed."
7. Select the checkbox for **Court Ordered** if the **Required Action** is court-ordered.
8. Recognize each of your **Needs Domains** has corresponding **Resource** fields.
9. Locate the **Resource Search** button. Selecting this button performs a search for **Resources** for manually added **Needs Domain** and **Required Actions**. Although you will be redirected to the **Resource Search** page, your information on the **Family Plan** will be retained.
10. When adding an additional resource, locate the **Add Resource** button. This generates another **Resource** section, including its corresponding **Resource Search** button.
11. When adding an additional required action, locate the **Add Required Actions** button. Selecting this button opens another text box that will require information on additional **Required Actions**.



**Note:** *Resource can be manually entered without selecting the **Resource button** by directly adding information in the **Resource related fields**.*

## Deleting a Required Action, Resource, or Needs Domain

1. Locate the Delete button for each domain in the Parent(s) Needs and Children(s) Needs and Actions section. Children(s) Needs and Actions to Address is only available in the FRE stage.
2. The following rules apply for deleting items:
  - **Needs Domains** that are prefilled from the **FSNA** cannot be deleted on the **Family Plan Detail** page for **Parent(s) Needs** section.
3. The following rules apply in the Parent(s) Needs and Children(s) Needs and Actions to Address sections:
  - Only **Needs Domains** that are manually added by the user can be deleted on the **Family Plan Detail** page.
  - Every **Needs Domain** on the plan must have at least one **Required Action** associated with it.
  - A **Required Action** can be deleted only if more than one **Required Action** is associated to a domain and at least one **Required Action** remains.
  - **Resource** fields can be deleted only if more than one **Resource** is associated to a domain and at least one **Resource** remains.

4. Using the rules above, select what is to be deleted from your **Family Plan**—a **Required Action**, a **Resource**, or an entire **Needs Domain**.
- If the checkbox corresponding to the **Needs Domain** is checked, the system will delete the **Needs Domain** and all the **Required Actions** and **Resource** fields associated with the domain. Only a manually added **Needs Domain** can be deleted.
  - If the checkbox corresponding to a **Required Action** is checked, the system will delete the required action and its associated **Resource** fields. Only a manually added **Required Action** can be deleted.
  - If the checkbox corresponding to a **Resource** is checked, the system will delete the **Resource** and its associated fields. Only a manually added **Resource** can be deleted.

- Case Summary
- Person
- Contacts/Summaries
- Service Authorization
- Legal
- SDM Assessments
- Family Plans**
- Medical

Family Plan | Services and Referrals Checklist | Visitation Plan

## Family Plan Detail

**Attention:**  
 Plan Completed/Conference Date and Next Review Due will be enabled once Foster Care Candidacy is completed.

Stage Name:  \* required field  
 Stage Code: FRE ↑ conditionally required field  
 Cause No:   
 Plan Type: Family Plan for Reunification Expand All Collapse All

Child(ren) Needs and Actions to Address:

- ▼  \* Physical Health/Physical Disability
- ▶  \* Child Development
- ▼  \* Education
- ▼  \* Education

Sort Order: 3

Sample data

\* Reason for Addition: Court Ordered

\* Required Action:  
 Education Required Action 1

\* Target Date/Completed: 04/26/2019 \* Priority/Status: Initial Court Ordered:

Resource   
 Resource   
 \* Resource Name:  Resource Phone:  Ext:   
 Resource Address 1:  Resource City:   
 Resource Address 2:  Zip:

Resource   
 \* Resource Name:  Resource Phone:  Ext:   
 Resource Address 1:  Resource City:   
 Resource Address 2:  Zip:

\* Required Action:

Education Required Action 2  
 Education Required Action 2

\* Target Date/Completed: 08/15/2019 \* Priority/Status: Initial Court Ordered:

Resource   
 \* Resource Name:  Resource Phone:  Ext:   
 Resource Address 1:  Resource City:   
 Resource Address 2:  Zip:

Add Resource

Add Resource

Add Required Action

Add Domain

## New in the Family Plan – Sort Order



1. Locate the **Sort Order** box for each **Needs Domain**.
2. Assign a number for each **Sort Order** box to specify the order in which each **Needs Domain** will appear on the **Family Plan** form.



**Note:** *Sort Order* is applied only on the **Family Plan** form. Assigning a sort order will not change the order of the **Needs Domain** on the **Family Plan Detail** page in which you are working.

Parent(s) Needs:

Child(ren) Needs and Actions to Address:

Physical Health/Physical Disability

Sort Order: 1

Sample Data

\* Required Action:

Sample Data

\* Target Date/Completed: 04/30/2019  \* Priority/Status: Initial  Court Ordered:

Resource

\* Resource Name: Test Resource  Resource Phone:  Ext:

Resource Address 1:  Resource City:

Resource Address 2:  Zip:

## Completing the Family Plan – Participation & Signature

1. For the field **Did the parents(s) participate and sign?**, select the "Yes" or "No" radio button.
2. Recognize that selecting the "No" radio button triggers a conditionally displayed field: "If parent(s) did not participate and or sign, please explain." You must enter the information into the textbox.
3. Provide information in the **Parent(s) comments and or concerns regarding the Family Plan** textbox, if appropriate. Although this is not required, it is best practice.



- The **Name of Contact** field will prefill with your name as the person who created the **Family Plan**. However, the **Staff Search** button is available for you to search for staff if needed.
- The **Telephone** and **Ext** fields are not prefilled, so you will have to provide that information.

The screenshot displays the 'Family Plan Detail' page. On the left is a navigation menu with options like 'Person', 'Contact Information', 'Legal', 'Family Plans', 'Notes', 'Communication Threads', and 'Case Management'. The main content area includes:

- Attention:** A section with a status indicator and a 'Staff Search' button.
- Primary Participant(s):** A table with columns for Name of Participant, Relationship, and Phone ID.
- Permanency Goal(s):** A table with columns for Name of Child(ren), Primary Permanency Goal(s), and Date to Achieve.
- Plan Dates:** Fields for Plan Complete/Discontinuation Date, Final Review Date, and FIMM Completion Date.
- Additional Participant(s):** A table with columns for Name of Participant(s), Type, Age, Gender, Relationship, and Phone ID. Below this table are sections for 'Child(ren) Strengths And Needs', 'Parent(s) Strengths', 'Parent(s) Needs and Actions to Address', and 'Child(ren) Needs and Actions to Address'. A red box highlights the 'Additional Participant(s)' table and the 'Name of Contact' and 'Telephone' fields at the bottom of the page.

---

## Save and Submit

---

1. When you want to save your information without submitting the plan for approval, select the **Save** button. They will be saved but remain in edit mode.
2. When you have completed the **Family Plan Detail** page, select the **Save and Submit** button. If you've completed the plan successfully, it will be submitted for approval.

If you have not completed the **Family Plan** correctly or completely, you will receive an error message listing the error(s) to be addressed.

- Case Overview
- Parent
- Child(ren) Information
- Service Information
- Legal
- 2024 Case Details
- Family Plan
- Medical
- Coordinated Support Plan
- Case Management

Family Plan
Review and Approvals
Child(ren)

## Family Plan Detail

**Attention:**  
\* Plan Completed/Conference Date and Next Review Date will be established once Foster Care Candidacy is completed.

\* Plan Name: [Redacted] \* Expires: 11/16  
\* Plan Title: FFS \* Created on: 10/29/2018  
\* Case No: [Redacted]

\* Plan Type: Family Plan for Youth/Adolescent Expand All Collapse All

---

**Primary Participant(s)**

Name of Person(s)	Relationship	Person ID
[Redacted]	Secondary Parent	[Redacted]

---

**Permanency Goal(s)** \* Foster Care Candidacy

Name of Child(ren)	Primary Permanency Goal(s)	Date to Achieve
<input type="checkbox"/> [Redacted]	Not Applicable	[Redacted]

[Delete](#)

---

**Plan Dates**

\* Plan Completion/Conference Date: [Redacted] \* Next Review Date: [Redacted]  
\* Current Review/Re-conference Date: [Redacted] \* FFSM Contract: [Redacted]

---

**Additional Participant(s)**

Name of Participant(s)	Type	Age	Status	Relationship	Person ID
[Redacted]					

[Delete](#) [Select Field\(s\)](#)

**Other Participant(s)**

\* **Hopes and Dreams for Child(ren):**

**Child(ren) Strengths And Needs:**

**Parent(s) Strengths:**

\* **Family History and Community Support:**

**Parent(s) Needs and Actions to Address:**

**Parent(s) Needs:**

**Child(ren) Needs and Actions to Address:**

\* **Do the parent(s) participate and sign?**  Yes  No  
\* **Parent(s) comments about concerns regarding the child(ren):**

\* **Parent Contact:** [Redacted] [Print](#) \* **Assignment:** [Redacted] **FCI:** [Redacted]

[Save](#) [Save as Draft](#)

---

**Notes**

**NOTE:** [Redacted] [Add](#)

# System Validation Error Alerts on the Family Plan – Common Errors

IMPACT 2.0 has system validations to prevent you from losing information you've entered on the page before exiting, and also checks numerous fields before allowing you to save and submit your **Family Plan**.

## System Validation Error Alerts on the Family Plan – When You Attempt to Edit an Existing Plan

If you attempt to edit or make changes on a **Family Plan** in **Pending** (PEND) or **Completed** (COMP) status, IMPACT 2.0 will generate an informational message: "Attention: There is an outstanding Family Plan approval request. Saving this page will invalidate that approval."

If you continue, you will invalidate the submission and you would have to re-submit the plan for approval.

The screenshot shows the 'Family Plan Detail' page. At the top, there are navigation tabs: 'My Tasks', 'Cases', 'Search', 'Reports', and 'Resources'. Below these are sub-tabs: 'Family Plan', 'Services and Release Checklist', and 'Validation Plan'. A left-hand sidebar contains a menu with items like 'Case Summary', 'Person', 'Contacts/Summaries', 'Service Authorization', 'Legal', 'EDM Assessments', 'Family Plans' (highlighted), 'Medical', 'Conservatorship Removal', and 'Case Management'. The main content area is titled 'Family Plan Detail' and features a prominent blue 'Attention:' alert box with a red border. The alert text reads: 'Attention: There is an outstanding family plan approval request. Saving this page will invalidate that approval.' Below the alert, the page displays fields for 'Stage Name', 'Stage Code' (FSU), and 'Case No.'. A 'Approval Status' button is visible. The 'Plan Type' is listed as 'Family Plan for Substitute Care'. At the bottom, there is a table for 'Primary Participant(s)' with columns for 'Name of Parent(s)', 'relationship', and 'Person ID'. One row is visible with the relationship 'Primary Parent'.



Texas Department of  
**Family and Protective Services**

# Family Plan of Service Family Substitute Care (FSU) and Family Reunification (FRE) – Family Plan Forms

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# Family Plan Forms Launched from the Family Plan Detail Page

An IMPACT 2.0 **Family Plan** form can be launched from the **Family Plan Detail** page as well as the **Family Plan List** page. The form contains all the information that has been entered on the associated **Family Plan Detail** page.

The **Family Plan** form can now be *digitally signed*!

The **Family Plan** form generated for printing will be downloaded in a PDF document that can be saved or printed.

For further information about printing and downloading forms please refer to the IMPACT 2.0 Overview eLearning course and job aid.

**Stages Impacted:** FSU, FRE

---

## Launching and Viewing the Family Plan form

---

Follow these steps to launch or download a **Family Plan** form for viewing:

1. Navigate to the **Family Plan Detail** page.
2. Locate the **Forms** field and select a plan from the dropdown.
3. Select the **Launch** button to view a plan, which will appear in a form on a new web page.

Home

Person

Contact Summary

Service Administration

Find

COA Assessments

**Family Plans**

My List

Administrative Renewal

Case Management

Family Plan
services and services case file
4/18/2019

## Family Plan Detail

**Attention:**

- Plan Completed/Overseen: Date and Next Review Date will be established once Foster Care Caseload is completed.

**Stage Name:**  \* Reg. notified  
**Stage Code:** FC2 (position / reg. notified)  
**Case No:**

**Plan Type:** Family Plan in Foster Care Print PDF | Copy to PDF

**Primary Participant(s)**

Name of Parent(s)	Relationship	Person ID
<input type="text"/>	Secondary Parent	<input type="text"/>

**Permanency Goal(s)** Foster Care Custody

Name of Goal(s)	Primary Permanency Goal(s)	Date to achieve
<input type="checkbox"/> <input type="text"/>	Not Applicable	<input type="text"/>

[Delete](#)

**Plan Dates**

\* Plan Completed/Overseen Date: 
\* Next Review Date:

Current Plan Review Conference Date: 
\* Future Conference:

**Additional Participant(s)**

Name of Participant(s)	Type	Age	Gender	Relationship	Person ID
No records exist.					

[Delete](#) [Add Participant\(s\)](#)

**Other Participant(s)**

**\* Hopes and concerns for child(ren):**

**Child(ren) Strengths And Needs:**

**Parent(s) Strengths:**

**\* Safety Network and Community Support:**

**Parent(s) Needs and Actions to Address:**

**Parent(s) Needs:**

**Child(ren) Needs and Actions to Address:**

**\* Assign parent(s) participant(s) as sign:**  yes  no

Parent(s) comment(s) on the assessment regarding this Family Plan

**\* Name of contact:**  [Save](#) **\* telephone:**    [Save](#)

[Back](#) [Save and Close](#)

**FORMS**

FORM:



---

## Launching and Viewing the Family Plan Form

---

1. Examine the **Family Plan** form, noting prefilled fields, fields that are now editable (**Name, Date Copy Given**), and the fields for electronic signatures.
2. Recognize the form can be printed directly from the launched web page.

FAMILY PLAN

Substitute Care

Case Name:
Case Number:
Cause Number:

PRIMARY PARTICIPANT(S):

PERMANENCY GOAL(S):(See last page for definitions)

Table with 6 columns: Name of Child(ren), Primary Permanency Goal(s), Date to Achieve, Concurrent Permanency Goal(s), Date to Achieve. Row 1: Family Preservation, 01/28/2019, DTC, 01/28/2019.

PLAN DATES:

Table with 2 columns: Plan Completed/Conference Date, Next Review Due. Row 1: 01/28/2019, 05/28/2019.

HOPES AND DREAMS FOR CHILD(REN):

ss

CHILDREN'S STRENGTHS AND NEEDS

DID THE PARENT(S) PARTICIPATE AND SIGN?Yes

If parent(s) did not participate and/or sign, please explain:

PARENT(S) COMMENTS AND/OR CONCERNS REGARDING THE FAMILY PLAN:

mnm

Contact Person- For information about the Family Service Plan or your child(ren), please contact:

NAME OF CONTACT TELEPHONE: EXT:

PARENT(S) ACKNOWLEDGEMENT

- 1. I understand the Texas Department of Family and Protective Services (DFPS) has determined that one of the following emergency conditions continues to exist in my family...
2. TO THE PARENT: THIS IS A VERY IMPORTANT DOCUMENT. ITS PURPOSE IS TO HELP YOU PROVIDE YOUR CHILD WITH A SAFE ENVIRONMENT...
3. I understand that if I have one or more children at home with me and if I am unwilling/unable to provide a safe environment...
4. I understand my progress on this plan will be evaluated as follows:
5. I understand information for the evaluation of my progress may come from any and all of the following sources:
6. I understand I may request a review or change of this plan or an evaluation of my progress at any time...
7. I understand that I can request interpreter or translator services if needed to assist me in complying with this plan.

Signature-Parent/Caregiver: Date: Date Copy Given:
Signature-Parent/Caregiver: Date: Date Copy Given:
Signature-Worker: Date:
Signature-Supervisor: Date:

RELATIVES, FRIENDS AND PROFESSIONALS SIGNATURES:

In some cases, the Family Service Plan may be utilized in relation with a court action. Only the parties having a legal relationship with the court may be held accountable to the tasks herein.

Name (print) Signature Date:
Name (print) Signature Date:
Name (print) Signature Date:
Name (print) Signature Date:
Name (print) Signature Date:
Name (print) Signature Date:
Name (print) Signature Date:
Name (print) Signature Date:
Name (print) Signature Date:
Name (print) Signature Date:
Signature-Facilitator Date:
Signature-Facilitator Date:

# Family Plan Form – Electronic Signatures

1. On the **Family Plan** form, select an electronic signature icon (the pencil icon next to each signature line).
2. A **Signature** dialogue box is displayed. Participants will electronically sign their name in this box and then select the **Save and Close** button to finalize their signature and close the dialogue box. The **Clear** button allows them to sign the form again if needed. The **Close** button allows them to close the dialogue box without saving their signature.
3. At the time of signature, the **Date** field prefills with the date and time signed.
4. You can obtain multiple electronic signatures on the plan at any time as long as the **Family Plan Detail** is in "APRV" status.
5. You cannot delete any electronic signatures that have been confirmed and placed on the form.

**Permanency Goal and Concurrent Goal: DFPS plans and backup plans for your child**

DFPS needs to determine if you are a permanent, safe and loving place where they have better care. To address this, DFPS creates something for each child called a Plan of Service. This defines the child's Permanency Goal and Concurrent Goal. A goal means where the child will live when DFPS services are done. DFPS must think about these issues for where the child will live:

- Will the child be safe?
- Is it family-like?
- Will it be forever—a permanent relationship as the young person matures through the years?

The Permanency Goal is the plan DFPS thinks would be best. If it cannot be done, DFPS also sets a backup plan called the Concurrent Goal. There can be more than one backup plan. DFPS works on the Concurrent Goal all the same time as the Permanency Goal. DFPS could choose the following options for your child, as either a Permanency Goal or a Concurrent Goal:

- Family Reunification - The parent gets the child back. This may be the parent the child was living with before DFPS care or it may be a parent the child was not living with.
- AF Family - Reunited/Adoptive Care, Adoption - A relative, close family friend or a person family already known to the family or child gets permanent custody of the child. For this to happen, the court has to end parental rights of both parents or wrap up the parents giving up their parental rights.
- AF Family - Head of Home Kin, Conservatorship - A relative, close family friend or a person family already known to the family or child gets permanent custody of the child.
- AF Family - Headed Adoption - The family who did not have the child because they were adopted the child. For this to happen, the court has to end parental rights of both parents or the parents give up their parental rights.
- AF Family - Headed Conservatorship - A person who is not a relative or family member gets permanent custody of the child.
- AFPLA - Foster Family, DFPS Conservatorship - DFPS gets permanent custody of the child. The child could live in a foster home until the foster mother is added. For this to happen, the court may or may not end parental rights of both parents or the parents may or may not give up their parental rights.
- AFPLA - Other Family, DFPS Conservatorship - DFPS gets permanent custody of the child. The child could live in the best medical and most family-like setting possible. For this to happen, the court may or may not end parental rights of both parents or the parents may or may not give up their parental rights.
- AFPLA - Independent Living - The youth would be in DFPS care until he or she is age 18.
- AFPLA - Community Care - A youth with a developmental disability would stay in DFPS care until age 18. When these youth reach adulthood, a legal guardian will need to look after their well-being.
- AF Family - Alternative Family.



Texas Department of  
**Family and Protective Services**

Family Plan of Service Family Substitute Care  
(FSU) and Family Reunification (FRE) –  
Family Plan Evaluation

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# Creating and Completing a New Family Plan Evaluation

After a **Family Plan of Service** has been created, you can create, update, and submit subsequent **Family Plan Evaluations** for supervisor approval.

After selecting a **Family Plan** or **Family Plan Evaluation** from the **Family Plan List** page, you will arrive at the **Select FSNA for Evaluation** page. This page displays all the approved and valid reassessed **FSNAs** within the stage you are working. An **FSNA** will be deemed valid for 30 calendar days after it has been approved.

Your **Family Plan Evaluation** will contain information prefilled from the selected **FSNA**, as well as from the most recent prior **Family Plan** or **Family Plan Evaluation**.

The **Family Plan Evaluation** will generally follow the same guidelines as the **Family Plan**. There are differences in the **Parent(s) Needs** and **Child(ren) Needs and Actions to Address** sections which are described below.

**Stages Impacted:** FSU, FRE

## Creating a New Family Plan Evaluation

Follow these steps to create a new **Family Plan Evaluation**.

1. Navigate to the **Family Plan List** page where you will find plans and evaluations listed in all stages and statuses.
2. From the list, select a **Family Plan** or **Family Plan Evaluation** in the stage you are working, with a status of "APRV."
3. Select the **Add** button.

Family Plan List

Stage Name: [REDACTED] # Submitted Events

Case ID: [REDACTED]

Show 10 entries

Date Entered	Status	Stage	Type	Description	Entered By	Event ID
01/30/2019	PROG	FRE	Family Plan	Family Plan - [REDACTED]	[REDACTED]	[REDACTED]
01/22/2019	APRV	FRE	Family Plan	Family Plan - [REDACTED]	[REDACTED]	[REDACTED]
01/22/2019	APRV	FRE	Family Plan Evaluation	Family Plan Evaluation - [REDACTED]	[REDACTED]	[REDACTED]
01/22/2019	APRV	FRE	Family Plan Evaluation	Family Plan Evaluation - [REDACTED]	[REDACTED]	[REDACTED]
11/26/2018	COMP	LIR	Family Plan	LIR (LIR) Family Plan completed 11/26/2018	[REDACTED]	[REDACTED]
11/27/2018	COMP	FRE	Family Plan	FRE REQ Family Plan completed 11/20/2018	[REDACTED]	[REDACTED]
11/15/2018	APRV	FRE	Family Plan Evaluation	Family Plan Evaluation - [REDACTED]	[REDACTED]	[REDACTED]
11/01/2018	APRV	LIR	Family Plan Evaluation	Family Plan Evaluation - [REDACTED]	[REDACTED]	[REDACTED]
10/30/2018	APRV	FRE	Family Plan	Family Plan - [REDACTED]	[REDACTED]	[REDACTED]
10/30/2018	APRV	FRE	Family Plan Evaluation	Family Plan Evaluation - [REDACTED]	[REDACTED]	[REDACTED]

Showing 1 to 10 of 15 entries

Page 1 of 2

[Add](#) [Launch Form](#)

## Creating a New Family Plan Evaluation – Select FSNA for Evaluation Page

1. Upon selecting the **Add** button on the **Family Plan List** page, you will arrive at the **Select FSNA for Evaluation** page. This page displays all the approved and valid **FSNAs** available in the stage you are working in for the case.
2. Select the radio button for the corresponding **FSNA**, and then select the **Continue** button.
3. If the selected **FSNA** successfully passes the validation checks, you will arrive at the **Family Plan Evaluation** page. Your **Family Plan Evaluation** will contain information prefilled from the **FSNA** as well as the most recent prior **Family Plan** or **Family Plan Evaluation**.

Type	Description	Primary Parent	Secondary Parent	Entered By
<input checked="" type="radio"/>	REAS	SQ4 FSNA - Reassessment		
<input type="radio"/>	INT	SQ4 FSNA - Initial		
<input type="radio"/>	INT	SQ4 FSNA - Initial		

## Completing the Family Plan Evaluation – Parent(s) Needs

The **Family Plan Evaluation** will follow the same guidelines as the **Family Plan**. The following are differences in the **Family Plan Evaluation**.

For each domain identified from the previous plan, there will be:

- An **Assessment of Need from Previous Family Plan** section that is prefilled with information.
- A **Current Assessment of Need** section that will prefill from the current reassessed FSNA.
- An **Evaluation of Progress** section that is editable and required.
- **Required Action** and **Resource Information** fields that will prefill from the previous plan of service.

Adding and deleting **Needs Domain**, **Required Action**, and **Resource** fields will follow the same guidelines as the **Family Plan**.



**Note:** *Needs Domains* from the **FSNA** that are manually added on the previous **Family Plan** or **Family Plan Evaluation** and are also identified in the selected **FSNA for Evaluation** will be labeled as "Need Confirmed in FSNA" on the **Family Plan Evaluation** page. These will display in the **Prior Needs** subsection of the **Parent(s) Needs** section.

- Case Summary
- Person
- Contacts/Summaries
- Service Authorization
- Legal
- SDM Assessments
- Family Plans**
- Medical
- Conservatorship Removal
- Case Management

Family Plan Evaluation

Attention: Current Review/Re-conference Date and Next Review Due will be enabled once Foster Care Candidacy is completed.

Stage Name: [redacted]  
 Stage Code: FSU  
 Case No: [redacted]  
 Plan Type: Family Plan Evaluation for Substitute Care

**Primary Participant(s)**

Name of Parent(s)	Relationship	Person ID
[redacted]	Primary Parent	[redacted]
[redacted]	Secondary Parent	[redacted]

**Permanency Goal(s)** Foster Care Candidacy

Name of Child(ren)	Primary Permanency Goal(s)	Date to Achieve	Concurrent Permanency Goal(s)	Date to Achieve
[redacted]	Not Applicable		Not Applicable	

**Plan Dates**

Plan Completed/Conference Date: 03/07/2019  
 Current Review/Re-conference Date: [redacted]  
 Next Review Due: 07/06/2019  
 FGDM Conference: Not Applicable

**Additional Participant(s)**

Name of Participant(s)	Type	Age	Gender	Relationship	Person ID
No records exist.					

**Other Participant(s):**

**Parent(s) Needs and Actions to Address:**

- Parent(s) Needs:
  - Garduza, Elizabet
    - Prior Needs Identified
      - Resource Management/Basic Needs
        - Assessment of Need from Previous Family Plan: [redacted]
        - Current Assessment of Need: This Need was not identified in the current Family Strengths and Needs Assessment
        - Evaluation of Progress: [redacted]
        - Required Action: [redacted]
        - Target Date/Completed: 03/07/2019  
 Priority/Status: Initial  
 Court Ordered: [redacted]
        - Resource: [redacted]
          - Resource Name: [redacted] Resource Phone: [redacted] Ext: [redacted]
          - Resource Address 1: [redacted] Resource City: GORRIDE
          - Resource Address 2: [redacted] Zip: [redacted]
      - Required Action: [redacted]
      - Target Date/Completed: [redacted]  
 Priority/Status: [redacted]  
 Court Ordered: [redacted]
      - Resource: [redacted]
        - Resource Name: [redacted] Resource Phone: [redacted] Ext: [redacted]
        - Resource Address 1: [redacted] Resource City: [redacted]
        - Resource Address 2: [redacted] Zip: [redacted]

**Social Support System: Non-Household**

**New Needs Identified**

Torres-Martine, Elezar

Did the parent(s) participate and sign?  Yes  No

Parent(s) comments and/or concerns regarding the Family Plan: [redacted]

Name of Contact: [redacted] Telephone: [redacted]



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## Completing the Family Plan Evaluation – Child(ren) Needs and Actions to Address (for FRE Only)

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The **Family Plan Evaluation** will follow the same guidelines as the **Family Plan**. The following are differences in the **Family Plan Evaluation**.

For each domain identified from the previous plan, there will be:

- An **Assessment of Need from Previous Family Plan** section that is prefilled with information.
- There is a **Current Assessment of Need** section that is editable and required.
- There is an **Evaluation of Progress** section that is editable and required.
- The **Required Action** and **Resource Information** will prefill from the previous plan of service.
- Adding and deleting **Needs Domain**, **Required Action**, and **Resource** fields will follow the same guidelines as the **Family Plan**.

Parent(s) Needs and Actions to Address:

Parent(s) Needs:

Child(ren) Needs and Actions to Address:

▼ [Unlabeled]

▼ Prior Needs Identified

▼ Child Development

Need Date:

Assessment of Need from Previous Family Plan

Current Assessment of Need

Evaluation of Progress

Program/Action

Target Date/Completed

02/13/2019

Priority Status

Emergent

Cost Shared

Add Resource

Add Required Action

Delete

▼ Emotional/Behavioral Health

▼ Delinquent/Criminal Behavior

▼ New Needs Identified

▼ Physical Health/Physical Disability

Need Date:

Reason for Addition

Required Action

Target Date/Completed

Priority Status

Cost Shared

Resource

Remove Entry

Resource Name

Resource Phone

EM

Resource Address 1

Resource City

Resource Address 2

Zip

Add Resource

Add Required Action

Delete

Add Needs

▼ [Unlabeled]

Did the parent(s) participate and sign?

Yes  No

Parent(s) comments or other concerns regarding the Family Plan:

Insurance/Carrier

Cost Shared

Trisplan

EM

Save

Cancel/Go Back