Visitation Plan for Family Substitute Care in IMPACT 2.0 – Overview List Page

Job Aid

Contents

Visitation Plan and No Contact Visitation Plan

Overview

IMPACT 2.0 has updated the functionality of the **Visitation Plan** in the **Family Substitute Care** (**FSU**) stage.

You can view Legacy and historical plans from the **Visitation Plan List** page. From this list page you may create new **Visitation Plans** or **No Contact Visitation Plans**, or select the **New Using** button to create a **Visitation Plan** or **No Contact Visitation Plan** from an existing IMPACT 2.0 plan on the page.

IMPACT 2.0's visitation plans replace the Legacy form document with the following new pages in the system:

- **Visitation Plan Detail** page
- **No Contact Visitation Plan Detail** page

These visitation plan detail pages allow you to complete a new **Visitation Plan** or **No Contact Visitation Plan**, update any existing plans, and ultimately submit them for supervisor approval in the **FSU** stage.

The IMPACT 2.0 **Visitation Plan Detail** page and **No Contact Visitation Plan Detail** page include prefilled fields, a **Participant(s)** list populated with your selections from a **Select Participant(s)** pop-up window, and other new features and functionalities designed to streamline and improve the process of creating a comprehensive visitation plan.

You can generate a PDF version or print a **Visitation Plan** form or **No Contact Visitation Plan** independently within a **Visitation Plan** or **No Contact Visitation Plan**.

Visitation Plan List Page – Introduction

IMPACT 2.0 features updated functionality to the **Visitation Plan List** page in the **Family Substitute Care** (**FSU**) stage only.

Caseworkers may view Legacy and historical visitation plans from the **Visitation Plan List** page.

You may create a completely new **Visitation Plan** or **No Contact Visitation Plan** from the **Visitation Plan List** page, or create a new plan by copying an existing plan by selecting the **New Using** button on the page.

You may also delete a **Visitation Plan** or **No Contact Visitation Plan** with a status of "PROC" (In-Process) or "COMP" (Complete) from this list page.

From the **Visitation Plan List** page, you can launch and print a **Visitation Plan** form or **No Contact Visitation Plan** form to distribute to others via email or fax.

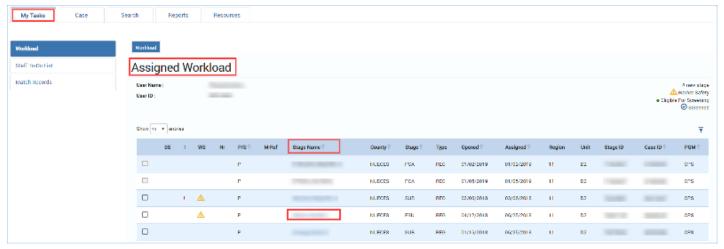# Using the Visitation Plan List Page

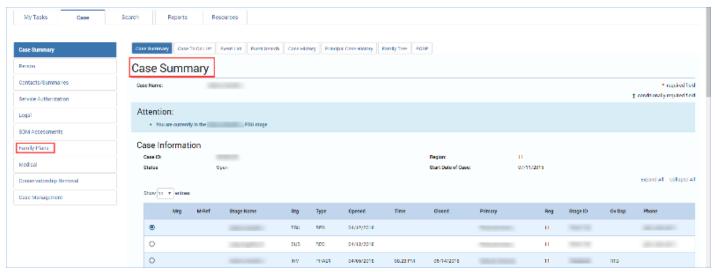**Application:** eLearning, Job Aid, TTT

Stages Impacted: FSU

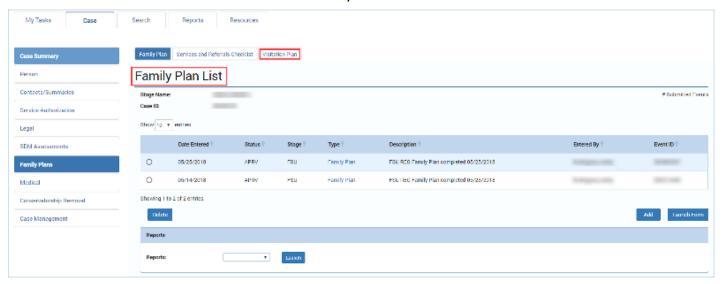## Visitation Plan List Page – How to Get There

1. From your **Assigned Workload** page within the **My Tasks** tab, select a **Case Name** hyperlink that is in the **FSU** stage.
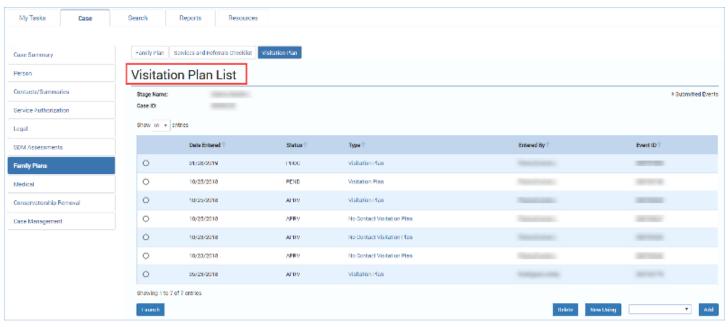

2. You will arrive at the **Case Summary** page.
3. Select **Family Plans** from the secondary menu.

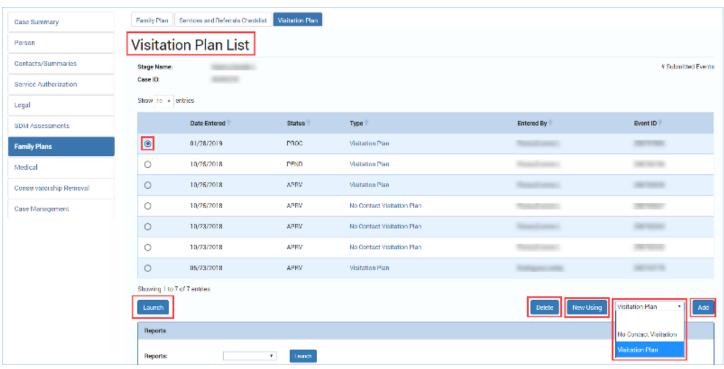4. Select **Visitation Plan** from the tertiary menu.

5. You will arrive at the **Visitation Plan List** page.

Visitation Plan List Page – Take a Tour

Follow these steps to take a tour of the new **Visitation Plan List** page to familiarize yourself with the capabilities it provides:

1. Locate the **Add** button. You will select the type of visitation plan from the dropdown field and select the **Add** button to create a new **Visitation Plan** or **No Contact Visitation Plan**.

2. Locate the radio buttons for existing plans. The **Visitation Plan List** page will list both Legacy visitation plans as well as those visitation plans created in IMPACT 2.0 so that you will be able to view them all.

3. Locate the **New Using** button. After selecting an existing IMPACT 2.0 plan by selecting its corresponding radio button, you will select the **New Using** button to copy a new plan from the selected plan.

4. Locate the **Launch** button. By selecting either a **Visitation Plan or No Contact Visitation Plan** from the plans listed on the page and selecting the **Launch** button, you open a printable version of that plan's form. You can either email or fax the form.

5. Locate the **Delete** button. After selecting a Visitation Plan you will select this button to delete the plan. Only Visitation Plans with a status of "PROC" (In-Process) or "COMP" (Complete) can be deleted.

Visitation Plan for Family Substitute Care in IMPACT 2.0 – Plan Detail Page

Job Aid

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Visitation Plan Detail Page – Introduction

The **Visitation Plan Detail** page is IMPACT 2.0's streamlined electronic version of the former visitation plans on paper. Pop-up windows, prefilled fields, and helpful hyperlinks are among the new features and functionality designed to streamline and improve the process of creating a comprehensive and effective visitation plan.

Application: eLearning, Job Aid, TTT

Stages Impacted: FSU
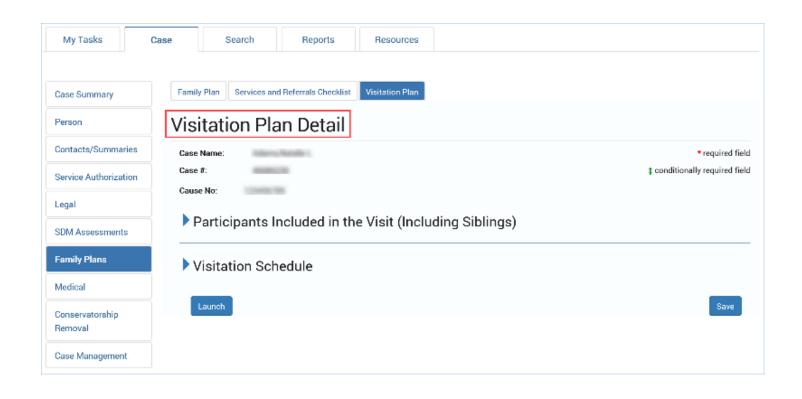
Creating a Visitation Plan Detail Page

You can create a new **Visitation Plan** in one of two ways:

a. Select "Visitation Plan" from the dropdown field and select the **Add** button on the **Visitation Plan List** page. This will create a new **Visitation Plan** and open the **Visitation Plan Detail** page.

b. Select the radio button for an existing plan and select the **New Using** button on the **Visitation Plan List** page. This will duplicate the existing plan as a new plan, opening the **Visitation Plan Detail** page and prefilling many fields with information from the original plan.

Either of these actions will take you the **Visitation Plan Detail** page, where you complete the **Visitation Plan** and submit it for supervisor approval.

*Note: If a there is a **Visitation Plan** or **No Contact Visitation Plan** that is in other than "APRV" (Approved) status that lists any of the same children who are the subject of the plan along with any of the same other participants (children who are not the subject of the Plan or the same other adults), IMPACT will prevent you from proceeding with this plan. The following message will display:*

"A [Visitation Plan] [and] [No Contact Visitation Plan] exists with one or more of the same Participants selected for this Plan that is not yet approved. The open Plan needs to be completed or deleted prior to proceeding with this new Plan."

My Tasks	Case	Search	Reports	Resources

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

Family Plan	Services and Referrals Checklist	**Visitation Plan**

Visitation Plan Detail

Case Name:
Case #:
Cause No:

* required field
‡ conditionally required field

▶ Participants Included in the Visit (Including Siblings)

▶ Visitation Schedule

[Launch]   [Save]
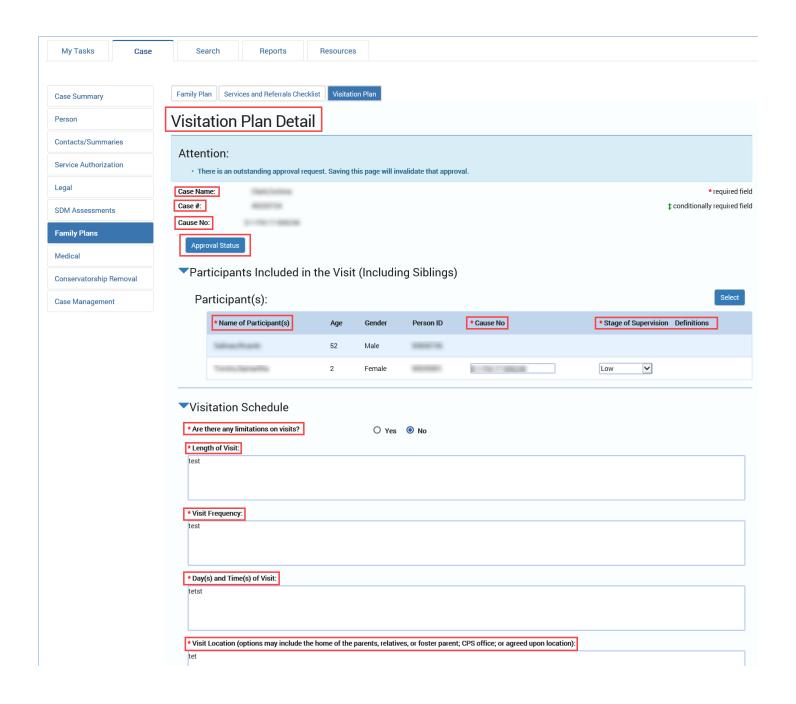
Completing the Visitation Plan Detail Page

After creating the new **Visitation Plan** and arriving at the **Visitation Plan Detail** page, you may complete the plan and submit for supervisor approval by selecting the **Save and Submit** button or you may, at any point prior to completion, save the plan by selecting the **Save** button.

Note: *You may edit a **Visitation Plan** while the **Visitation Plan Detail** page is in "PROC," "COMP," or "PEND" status prior to supervisor approval. However, once the **Visitation Plan Detail** page has been approved by a supervisor, the plan is locked to editing.*

1. Observe the prefilled fields on the **Visitation Plan Detail** page such as **Case Name**, **Case #**, and **Cause No**.

2. Observe the **Approval Status** button has retained its Legacy display and functionality features.

3. Observe the fields marked by a red asterisk (*), denoting they are required fields.

| My Tasks | Case | Search | Reports | Resources |

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

Family Plan | Services and Referrals Checklist | Visitation Plan

Visitation Plan Detail

Attention:
· There is an outstanding approval request. Saving this page will invalidate that approval.

Case Name:

* required field

Case #:

‡ conditionally required field

Cause No:

[Approval Status]

▼ Participants Included in the Visit (Including Siblings)

Participant(s):   [Select]

* Name of Participant(s)	Age	Gender	Person ID	* Cause No	* Stage of Supervision Definitions
	52	Male			
	2	Female			Low ▼

▼ Visitation Schedule

* Are there any limitations on visits?   ○ Yes ● No

* Length of Visit:

test

* Visit Frequency:

test

* Day(s) and Time(s) of Visit:

tetst

* Visit Location (options may include the home of the parents, relatives, or foster parent; CPS office; or agreed upon location):

tet

* Visit Location (options may include the home of the parents, relatives, or foster parent; CPS office; or agreed upon location):

tet

‡ Visit Supervision (list all persons approved to supervise and their contact information):

teat

* Additional Supportive Adults (list any adults that the parent would like CPS to consider to supervise visits and aid in transportation):

test

‡ If visits are supervised, address what needs to occur for visits to have less/no supervision:

test

* List other approved forms of contact (examples include email, social media, texting, or phone calls):

tetat

* Rules and expectations for visits (including any rules regarding who may come to the visit):

test

* Services provided to support visitation (address services that are being provided to the parent to assist with the visits, such as transportation, snacks, activities, etc.):

tetat

[Launch]   [Save] [Save and Submit]
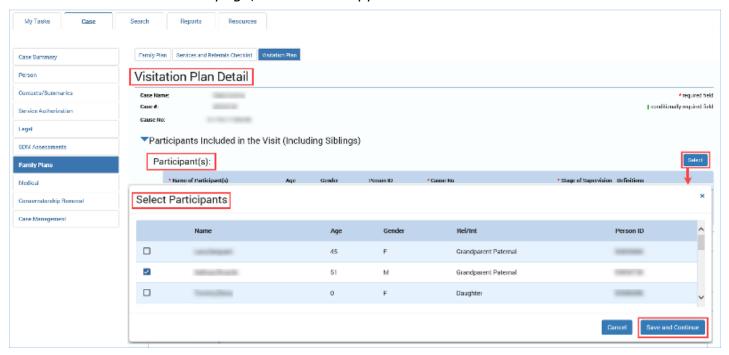
Completing the Visitation Plan Detail Page – Participant(s) List

Participants are added to the **Visitation Plan** from the **Participants included in the Visit (including Siblings)** section.

1. Expand the section for **Participants included in the Visit (including Siblings)** and select the **Select** button.

2. The **Select Participants** page will open in a pop-up window. Select the checkboxes on the **Select Participants** page to select those persons you wish to include in your plan.

3. Select the **Save** button on the **Select Participants** page pop-up window to close the window. Your selections automatically populate the **Participant(s)** list on the **Visitation Plan Detail** page.

Note: *At least two participants are required where at least one is a child with a* **Cause No.** *and a* **Stage of Supervision**.

Recognize that some participant information such as **Age**, **Gender**, *and* **Person ID** *display on the* **Visitation Plan Detail** *page, but will not appear on the* **Visitation Plan** *form.*
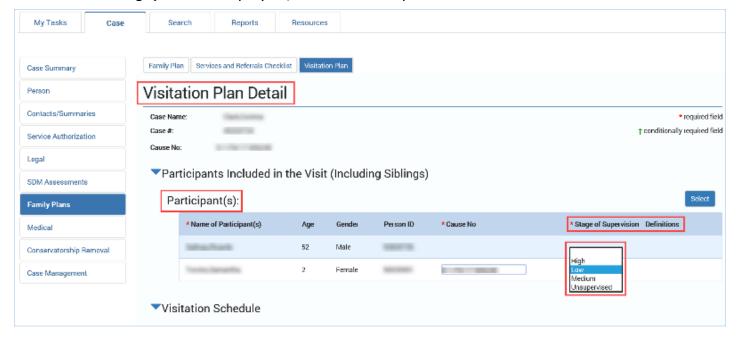
Participant(s) List – Stage of Supervision

The **Stage of Supervision** dropdown is where you specify what level of supervision must be included in the **Visitation Plan**.

1. In the **Participant(s)** list, select an option from the **Stage of Supervision** dropdown. Options are "Unsupervised," "Low," "Medium," and "High."

2. The **Definitions** heading is a hyperlink you can use to access the definitions for the different **Stage of Supervision** options.

Note: *The **Stage of Supervision** field only displays for **Participant(s)** with a **Cause No.** displayed for children in a **SUB** stage, or where a **Cause No.** is entered by you (for children not in a **SUB** stage). When displayed, this field is required.*

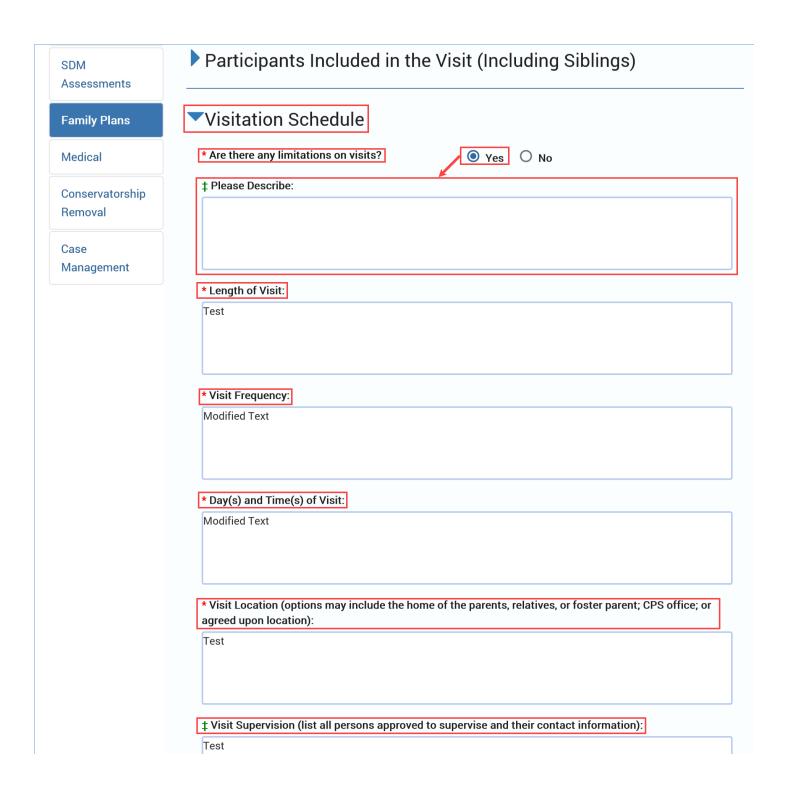# Completing the Visitation Plan Detail Page – Visitation Schedule Section

The **Visitation Schedule** section is where you specify the conditions and details of visitations, including limitations on visits, the allowed length of visits, and days and times of visits.

1. Expand the **Visitation Schedule** section.

2. Select the **Yes** or **No** radio button for the item **Are there any limitations on visits?** Your response to this item will initiate the following conditionally required field:

   - **Please Describe.** If you select "Yes," the **Please Describe** text box is required.
   - **Length of Visit**
   - **Visit Frequency**
   - **Day(s) and Time(s) of Visit**
   - **Visit Location**
   - **Additional Supportive Adults**
   - **List other approved forms of contact**
   - **Rules and expectations for visits**
   - **Services provided to support visitation**

The remaining fields are required to be completed:

The following fields are conditionally displayed when "Low," "Medium," or "High" is selected for the field "Stage of Supervision":

- **Visit Supervision**
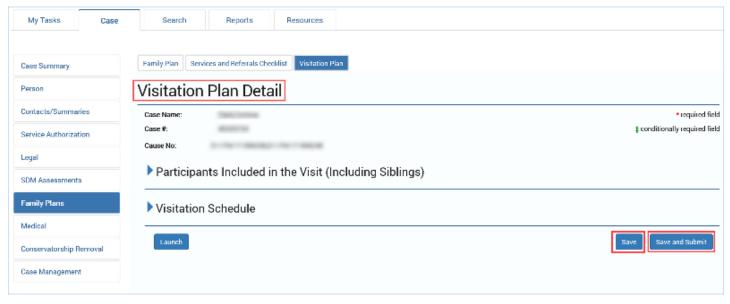- **If visits are supervised, address what needs to occur for visits to have less/no supervision**

▶ Participants Included in the Visit (Including Siblings)

▼ Visitation Schedule

* Are there any limitations on visits?   ◉ Yes   ○ No

‡ Please Describe:

[ ]

* Length of Visit:

Test

* Visit Frequency:

Modified Text

* Day(s) and Time(s) of Visit:

Modified Text

* Visit Location (options may include the home of the parents, relatives, or foster parent; CPS office; or agreed upon location):

Test

‡ Visit Supervision (list all persons approved to supervise and their contact information):

Test

‡ Visit Supervision (list all persons approved to supervise and their contact information):

Test

* Additional Supportive Adults (list any adults that the parent would like CPS to consider to supervise visits and aid in transportation):

Test

‡ If visits are supervised, address what needs to occur for visits to have less/no supervision:

Test

* List other approved forms of contact (examples include email, social media, texting, or phone calls):

Teset

* Rules and expectations for visits (including any rules regarding who may come to the visit):

Test

* Services provided to support visitation (address services that are being provided to the parent to assist with the visits, such as transportation, snacks, activities, etc.):

Test

Visitation Plan Detail Page – Save vs. Save and Submit

The **Save** and **Save and Submit** buttons enable you either save your **Visitation Plan** and continue to work on it, or save and submit the plan for approval.

1. Select the **Save** button to save your information but remain on the **Visitation Plan Detail** page.

2. Select the **Save and Submit** button to submit your **Visitation Plan Detail** page for supervisor approval. IMPACT 2.0 will perform its validation checks and either submit the plan for approval, or generate error messages for any issue(s) preventing a successful submission.
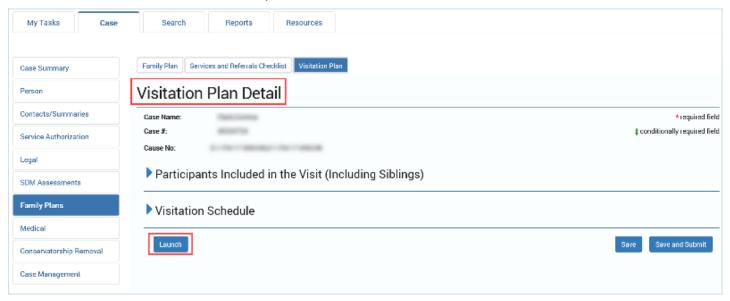

*Note: Remember, you can edit a **Visitation Plan Detail** page while the page is "PROC," "COMP," or "PEND" status, prior to supervisor approval. Once a **Visitation Plan Detail** page has been approved by a supervisor and in "APRV" status, the plan is locked to editing.*

Visitation Plan Detail Page – Launching the Visitation Plan Form

You can launch a **Visitation Plan** form from either the **Visitation Plan List** page or the **Visitation Plan Detail** page.

To launch a **Visitation Plan** form from within the **Visitation Plan Detail** page, select the **Launch** button. It will open the form in a separate window and you may create a printable version of the form to email, or to print and fax.

Visitation Plan for Family Substitute Care in IMPACT 2.0 – No Contact Plan

Job Aid

Contents

No Contact Visitation Plan Detail Page – Introduction

NEW!

The **No Contact Visitation Plan Detail** page, like the **Visitation Plan Detail** page, features pop-up windows, tables, and prefilled fields to streamline and improve the process of creating a comprehensive and effective **No Contact Visitation Plan.**

Application: eLearning, Job Aid, TTT

Stages Impacted: FSU
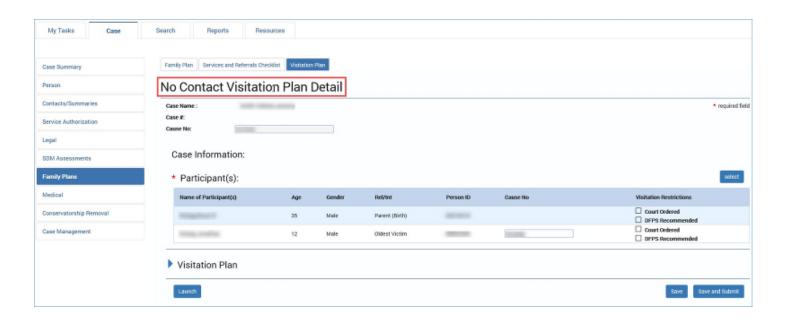
Creating the No Contact Visitation Plan Detail Page

You can create a new **No Contact Visitation Plan** in much the same way as a **Visitation Plan** using one of the following two ways:

a. Select "No Contact Visitation Plan" from the dropdown field and select the **Add** button on the **Visitation Plan List** page. This will create a new No Contact Visitation Plan.

b. Select the radio button for an existing plan and select the **New Using** button on the **Visitation Plan List** page. This will duplicate the existing plan as a new plan, prefilling many fields with information from the original plan.

Either of these actions will take you to the **No Contact Visitation Plan Detail** page where you complete the **No Contact Visitation Plan** and submit it for supervisor approval.

Note: If a there is a Visitation Plan or No Contact Visitation Plan that is in other than "APRV" (Approved) status, that lists any of the same children who are the subject of the plan along with any of the same other participants (children who are not the subject of the plan or the same other adults), IMPACT will prevent you from proceeding with the plan. The following message displays:

" If a there is a Visitation Plan or No Contact Visitation Plan that is in other than approved status (<> APRV), that lists any of the same children who are the subject of the Plan along with any of the same other participants (children who are not the subject of the Plan or the same other adults), IMPACT shall prevent proceeding with this Plan."

Completing the No Contact Visitation Plan Detail Page

After opening the **No Contact Visitation Plan Detail** page, you can either save the plan or, once completed, save and submit the plan for approval by a supervisor.

 Note: *You may edit a visitation plan while the* **No Contact Visitation Plan Detail** *page is in "PROC," "COMP," or "PEND" status prior to supervisor approval. Once the* **No Contact Visitation Plan Detail** *page has been approved by a supervisor (in "APRV" status), the plan is locked to editing.*

1. **Case Name**, **Case #**, and **Cause No.** are prefilled on the **No Contact Visitation Plan Detail** page.

2. The **Approval Status** button opens the **Approval Status** page and retains its Legacy display and functionality features.

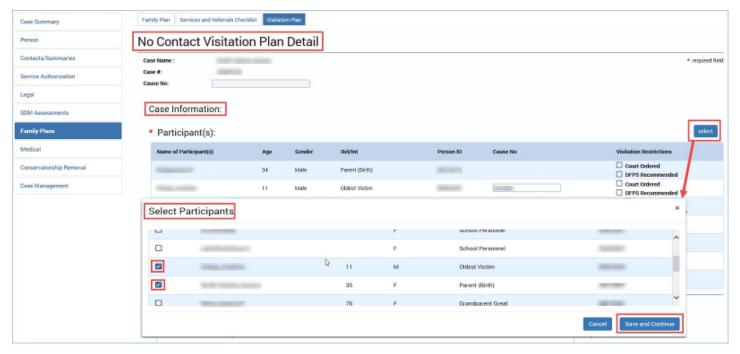3. Note the fields marked by a red asterisk (*), which are required fields.

Completing the No Contact Visitation Plan Detail Page – Case Information Section – Participant(s) List

Participants are added to the **No Contact Visitation Plan** from the **Case Information** section.

1. The **Select** button in the **Case Information** section opens a new pop-up window with a list of participants.

2. The **Select Participants** page will open in a pop-up window. Select the checkboxes on the **Select Participants** page to select those persons you wish to include in your plan.

3. Select the **Save** button on the **Select Participants** page pop-up window to close the window. Your selections automatically populate the **Participant(s) List** within the **Case Information** section.
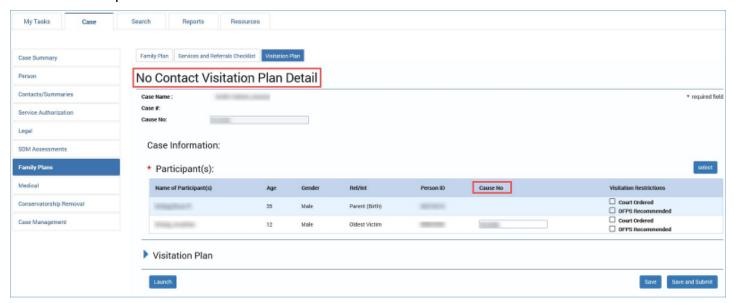
*Note: At least two participants are required where at least one is a child with a **Cause No.** and a **Stage of Supervision**.*

*Recognize that some participant information such as **Age, Gender, Rel/Int**, and **Person ID** display on the **No Contact Visitation Plan Detail** page, but will not appear on the **No Contact Visitation Plan** form.*

Participant(s) List – Cause Number

This field is displayed with a **Cause No.** for children (under age 18) in a **Substitute Care** (**SUB**) stage, or where a **Cause No.** is entered by you for children not in a **SUB** stage. When displayed, this field is required.

Participant(s) List – Visitation Restrictions

Select one or both of the checkboxes in **Visitation Restrictions** for each participant. The two checkboxes are "Court Ordered" and "DFPS recommended."

Complete the No Contact Visitation Plan Detail Page – Visitation Plan Section

The **Visitation Plan** section is where you explain the decision for no contact visitations and where you specify the criteria for renewed visitations and which visitations are allowed by supportive adults.

1. Expand the **Visitation Plan** section.
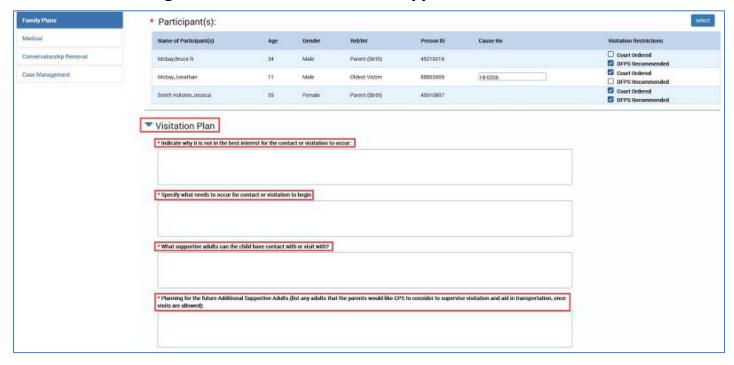
2. Complete the following textboxes. Each textbox is required to successfully submit the plan for approval.

   - **Indicate why it is not in the best interest for the contact or visitation to occur**

   - **Specify what needs to occur for contact or visitation to begin**

   - **What supportive adults can the child have contact with or visit with?"**

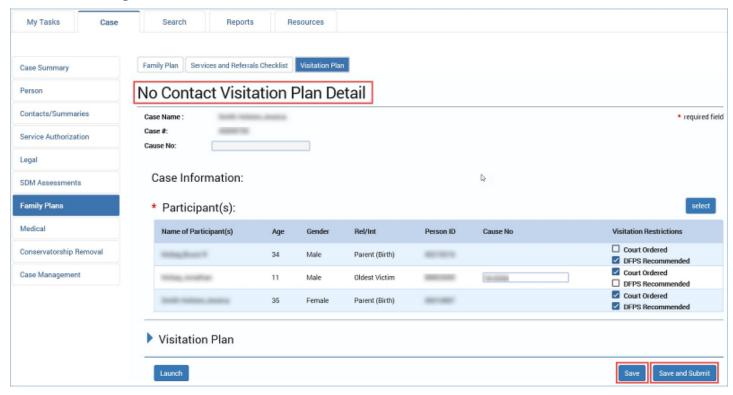   - **Planning for the future: Additional Supportive Adults**

No Contact Visitation Plan Detail Page – Save vs. Save and Submit

The **Save** and **Save and Submit** buttons enable you either save your **No Contact Visitation Plan** and continue to work on it, or save and submit the plan for approval.

1. Select the **Save** button to save your information but remain on the **No Contact Visitation Plan Detail** page.

2. Select the **Save and Submit** button to submit your **No Contact Visitation Plan Detail** page for supervisor approval. IMPACT 2.0 will perform its validation checks and either submit the plan for approval, or generate messages for any issue(s) preventing a successful submission.

Note: *Remember, you can edit a **No Contact Visitation Plan Detail** page while the page is in "PROC," "COMP," or "PEND" status prior to supervisor approval. Once a **No Contact Visitation Plan Detail** page has been approved by a supervisor (in "APRV" status), the plan is locked to editing.*

| My Tasks | Case | Search | Reports | Resources |

| Case Summary | Family Plan | Services and Referrals Checklist | Visitation Plan |

No Contact Visitation Plan Detail

Case Name :

Case #:

Cause No:

* required field

Case Information:

* Participant(s): [select]

Name of Participant(s)	Age	Gender	Rel/Int	Person ID	Cause No	Visitation Restrictions
	34	Male	Parent (Birth)			☐ Court Ordered ☑ DFPS Recommended
	11	Male	Oldest Victim			☑ Court Ordered ☐ DFPS Recommended
	35	Female	Parent (Birth)			☑ Court Ordered ☑ DFPS Recommended

▶ Visitation Plan

[Launch]   [Save] [Save and Submit]

Sidebar navigation: Case Summary, Person, Contacts/Summaries, Service Authorization, Legal, SDM Assessments, Family Plans, Medical, Conservatorship Removal, Case Management

No Contact Visitation Plan Detail Page – Launching the No Contact Visitation Plan Form

You can launch a **No Contact Visitation Plan** form from either the **Visitation Plan List** page or the **No Contact Visitation Plan Detail** page.

To launch a **No Contact Visitation Plan** form from within the **No Contact Visitation Plan Detail** page, select the **Launch** button. It will open the form in a separate window and you may create a printable version of the form to email, or to print and fax.