Texas Department of Family and Protective Services

Family Plan of Service FBSS/FPR- Introduction to New Features

Contents

Family Plan of Service – Introduction to New Features

The **Family Plan of Service** (Family Plan) for Family-Based Safety Services (FBSS) in the **Family Preservation** (**FPR**) stage 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**.

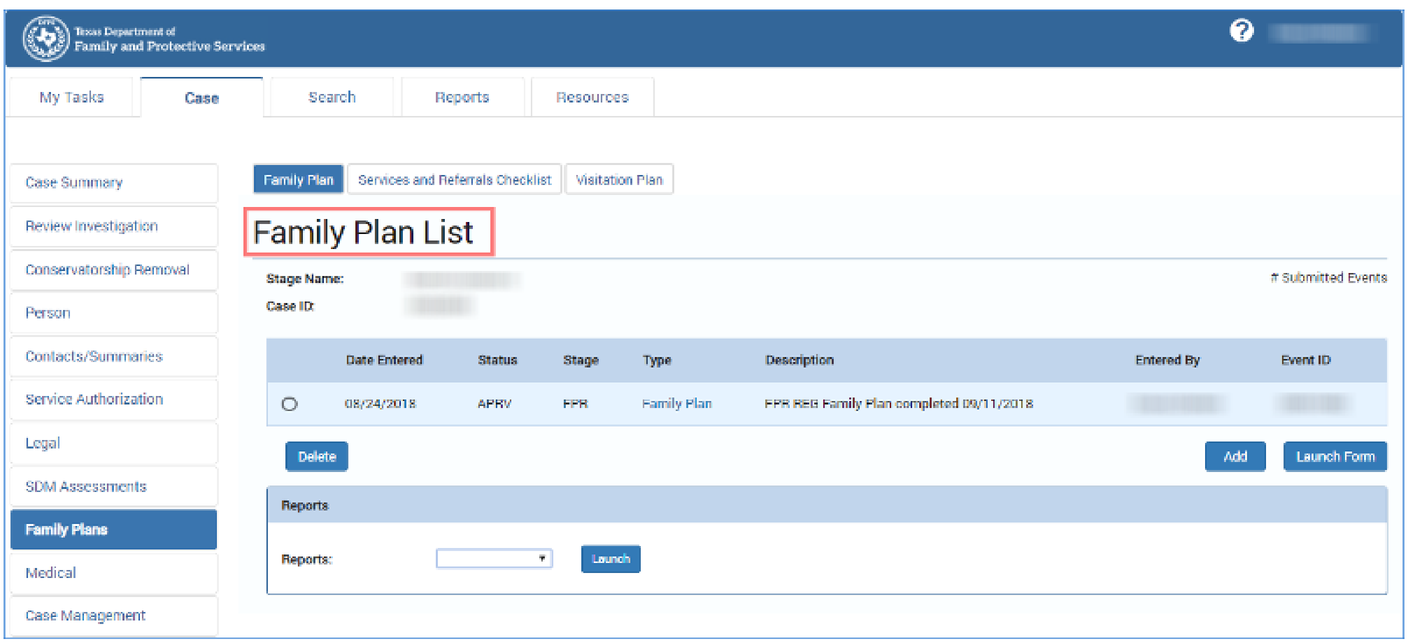
In IMPACT 2.0, you have both the ability to launch forms for printing as well as download to create a PDF version. Information about launching and downloading forms is covered in the IMPACT 2.0 Form Download job aid.

Stages Impacted: FPR

New Feature – One List Page for Everything

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

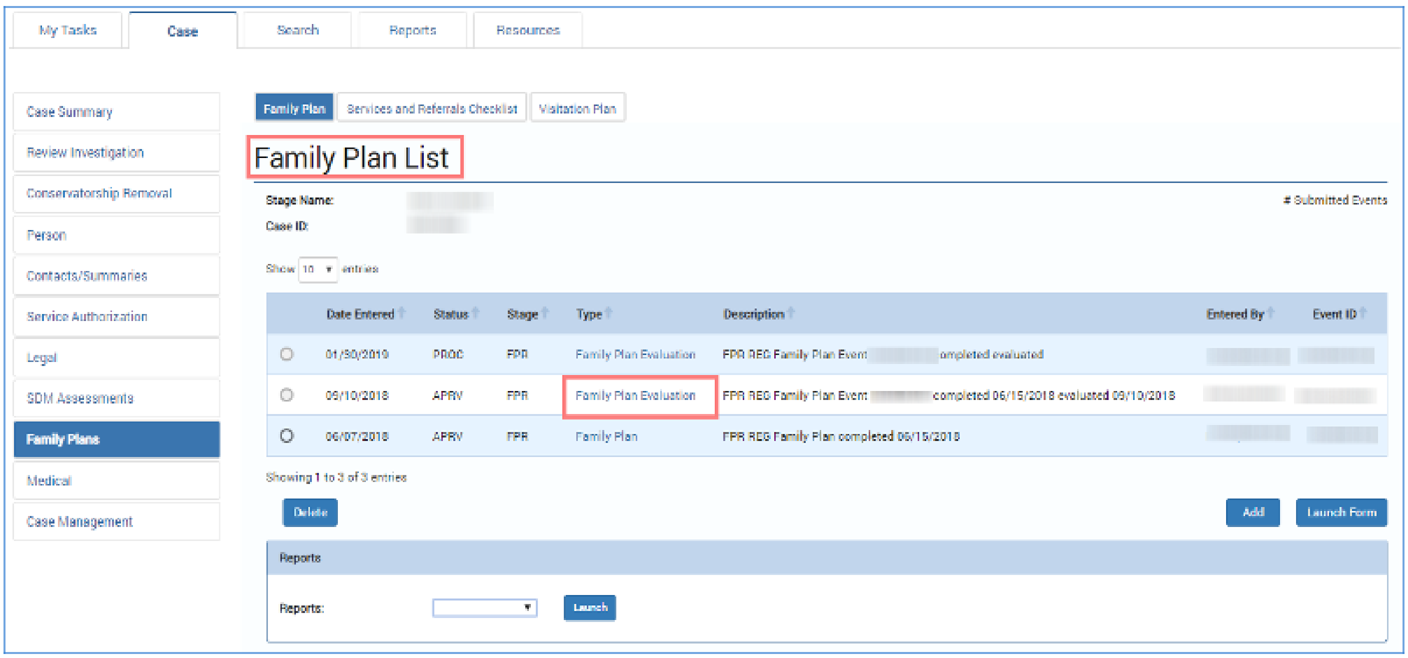
You will be able to view plans and evaluations in all stages and statuses, all on one page! This includes plans in the stages of **Family Preservation** (**FPR**), **Family Substitute Care** (**FSU**) and **Family Reunification** (**FRE**); and with a status of In-Process (PROC), Pending (PEND), Completed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



New Feature – View, Edit, or Delete Historical Family Plans and Family Plan 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 a **Family Plan Evaluation**.

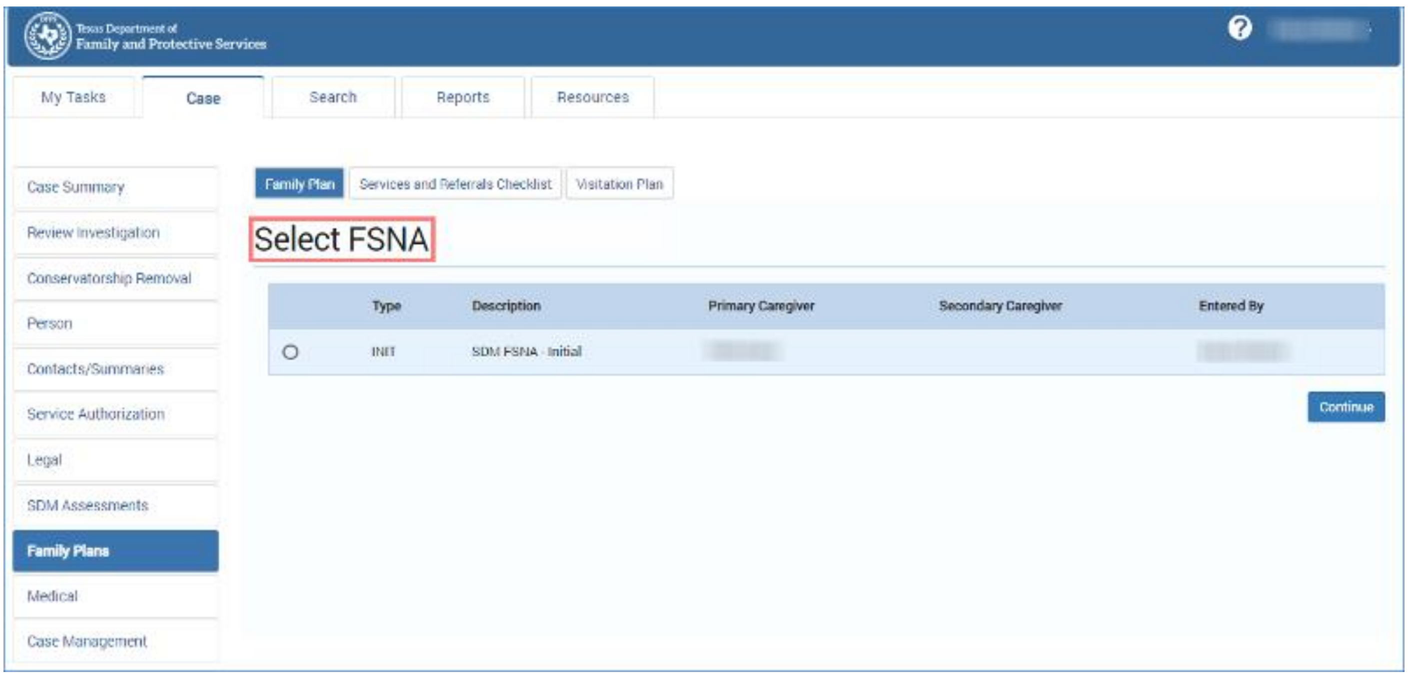
You can also edit plans and evaluations in "PEND" or "COMP" status, and delete plans or evaluations in "PROC" status.



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

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

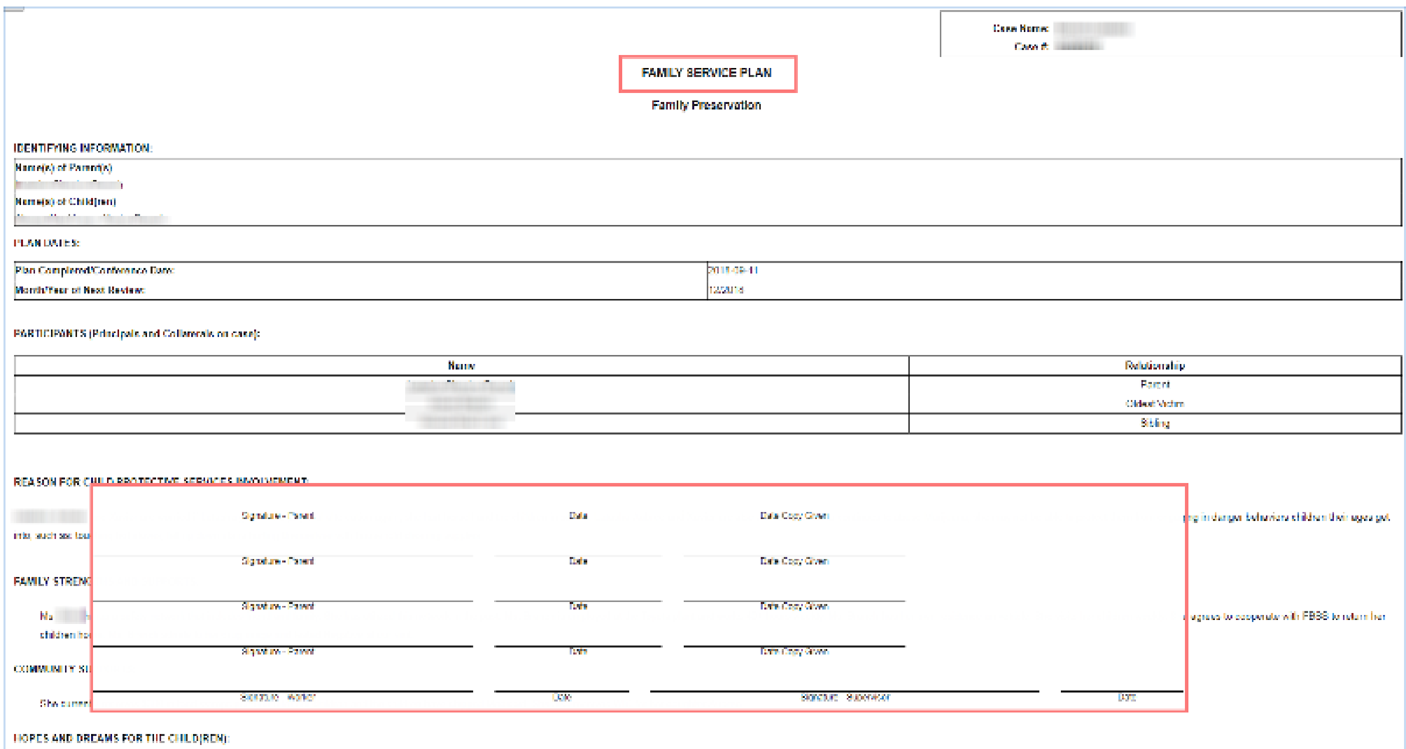
This will reduce the time spent replicating data, and will streamline the process of completing a **Family Plan** or **Family Plan Evaluation**.



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

IMPACT 2.0 Forms can now be easily launched 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*!



Case Name:
Case #:

FAMILY SERVICE PLAN

Family Preservation

IDENTIFYING INFORMATION:

Name(s) of Parent(s)

Name(s) of Child(ren)

PLAN DATES:

Plan Completed/Conference Date:	2018-09-11
Month/Year of Next Review:	12/2018

PARTICIPANTS (Principals and Collaterals on case):

Name	Relationship
	Parent
	Oldest Victim
	Sibling

REASON FOR CHILD PROTECTIVE SERVICES INVOLVEMENT:

FAMILY STRENG

COMMUNITY SU

Signature - Parent	Date	Date Copy Given
Signature - Parent	Date	Date Copy Given
Signature - Parent	Date	Date Copy Given
Signature - Parent	Date	Date Copy Given

Signature - Worker	Date	Signature - Supervisor	Date

HOPES AND DREAMS FOR THE CHILD(REN):

Texas Department of
Family and Protective Services

Family Plan of Service FBSS/FPR – Family Plan List Page

Contents

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.

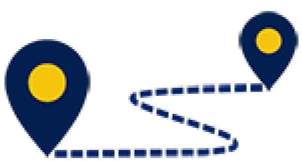
As a result of the consolidation, the **Family Plan Evaluation List** page and **Family Plan for Case** page have been removed.

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.

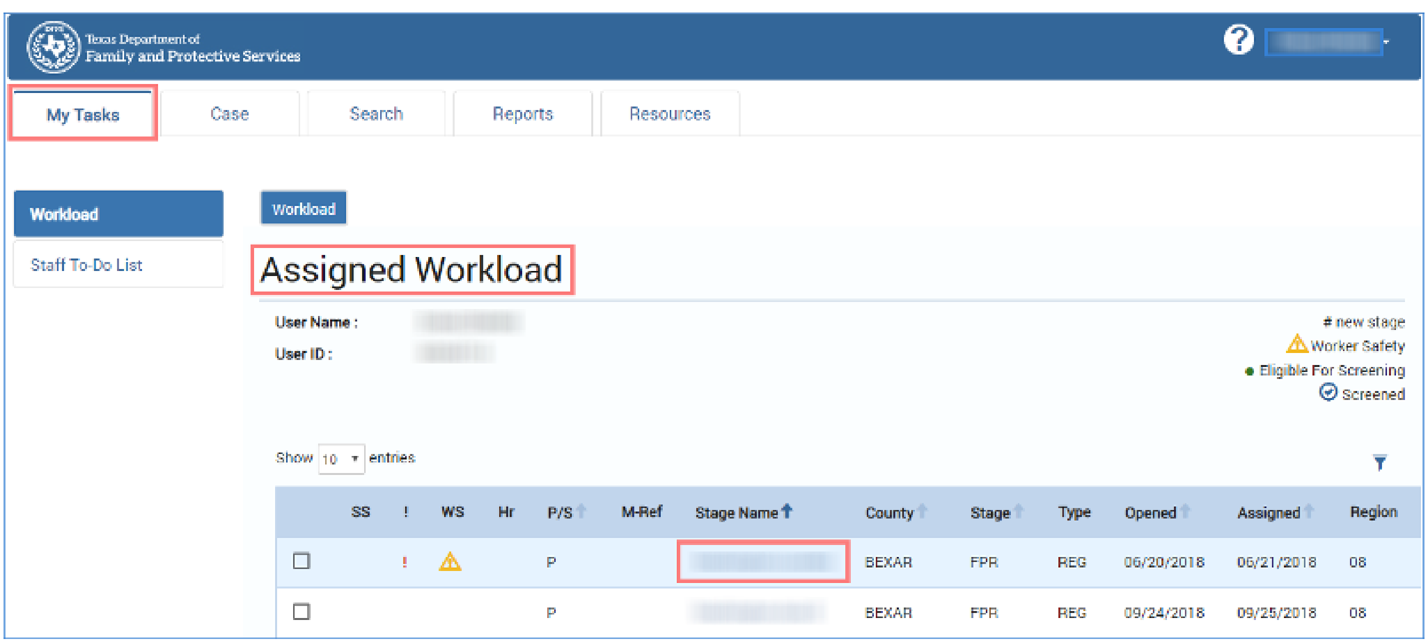
From the **Family Plan List** page, you can generate a **Case Event List** report, and launch IMPACT 2.0 forms that can be downloaded (and signed digitally.)

Stages Impacted: FPR

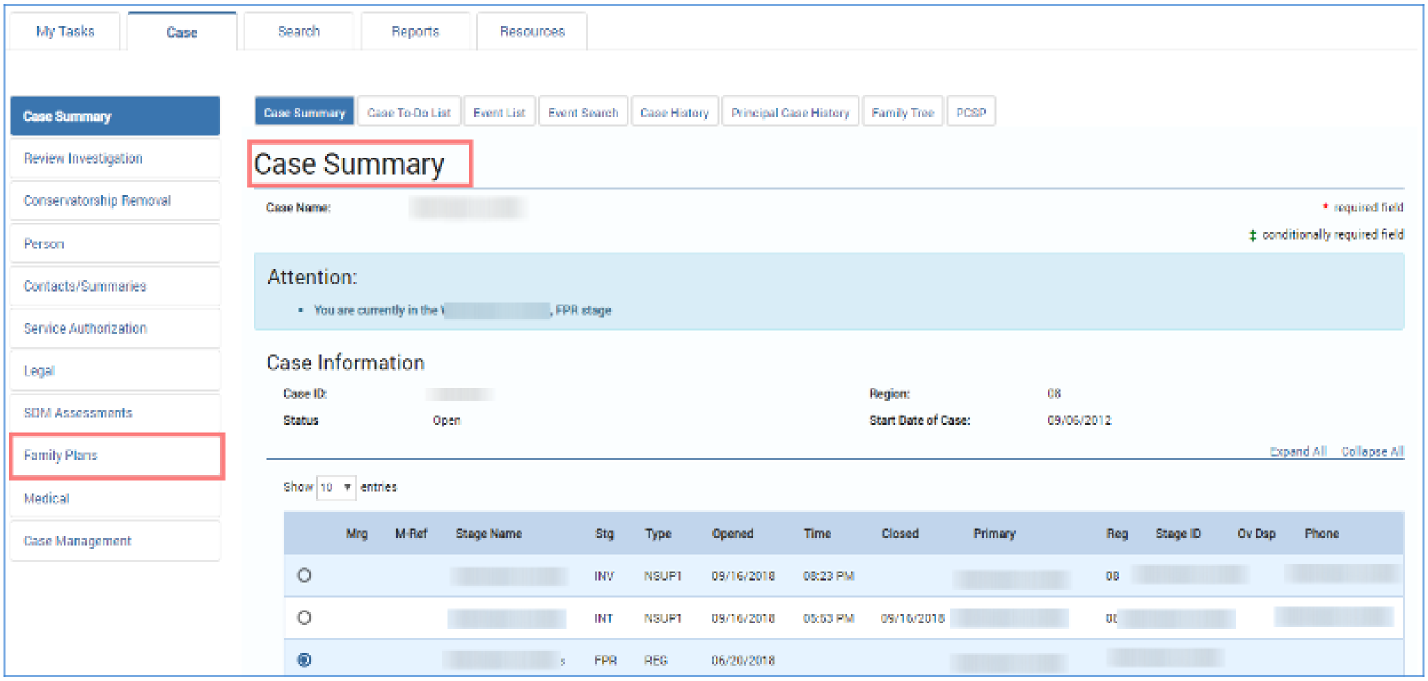
Family Plan List Page – How to Get There



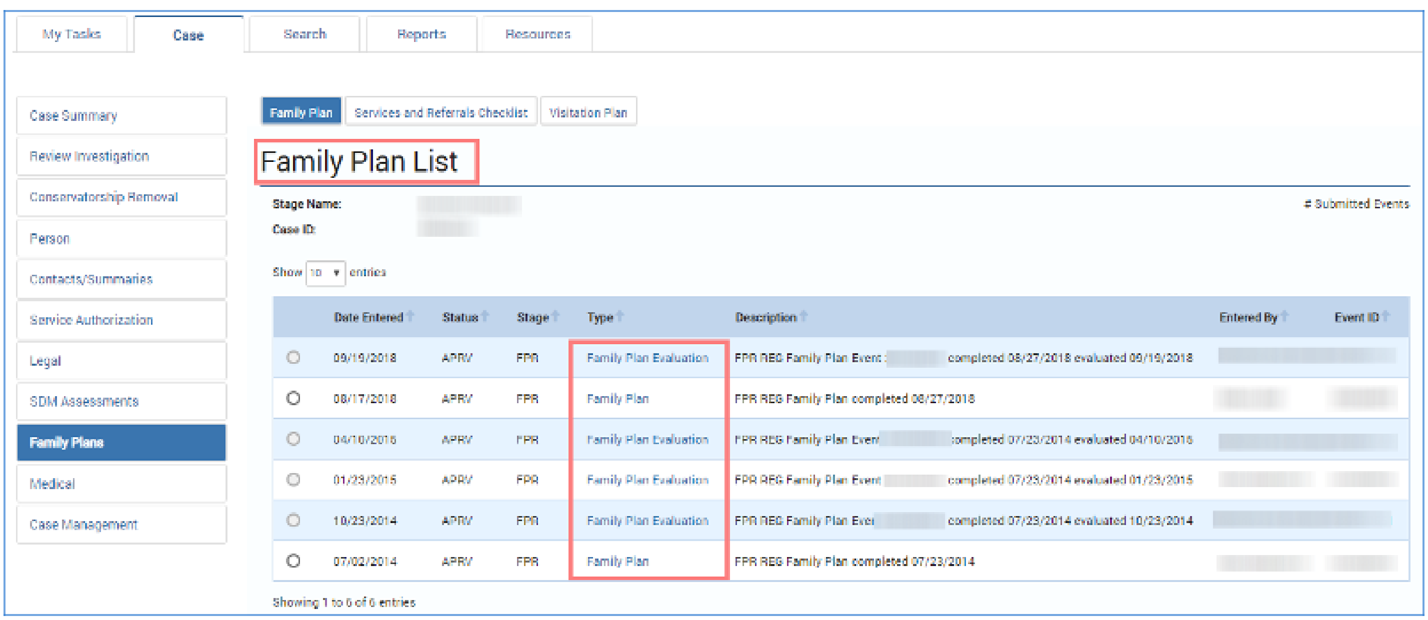
1. The **Family Plan List** page is the starting point when viewing, editing, or deleting existing plans and evaluations, or creating a new **Family Plan** or a **Family Plan Evaluation**, so let's start there!
2. From your **Assigned Workload** in the **My Tasks** tab, select the **Stage Name** hyperlink for the case.



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

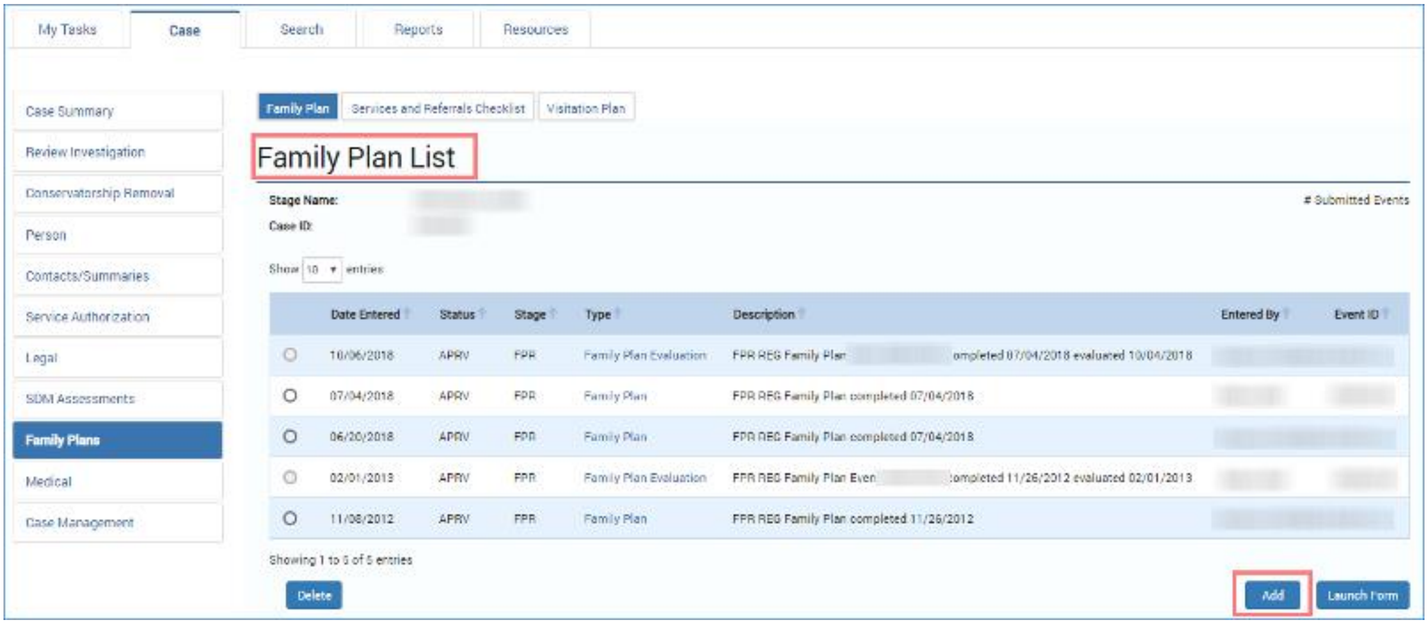


5. You will arrive at the **Family Plan List** page.
6. Recognize there can be **Family Plans** and **Family Plan Evaluations** for the same Case ID in any status (COMP, PEND, PROC, and APRV) as well as any stage (**FPR**, **FSU**, and **FRE**).

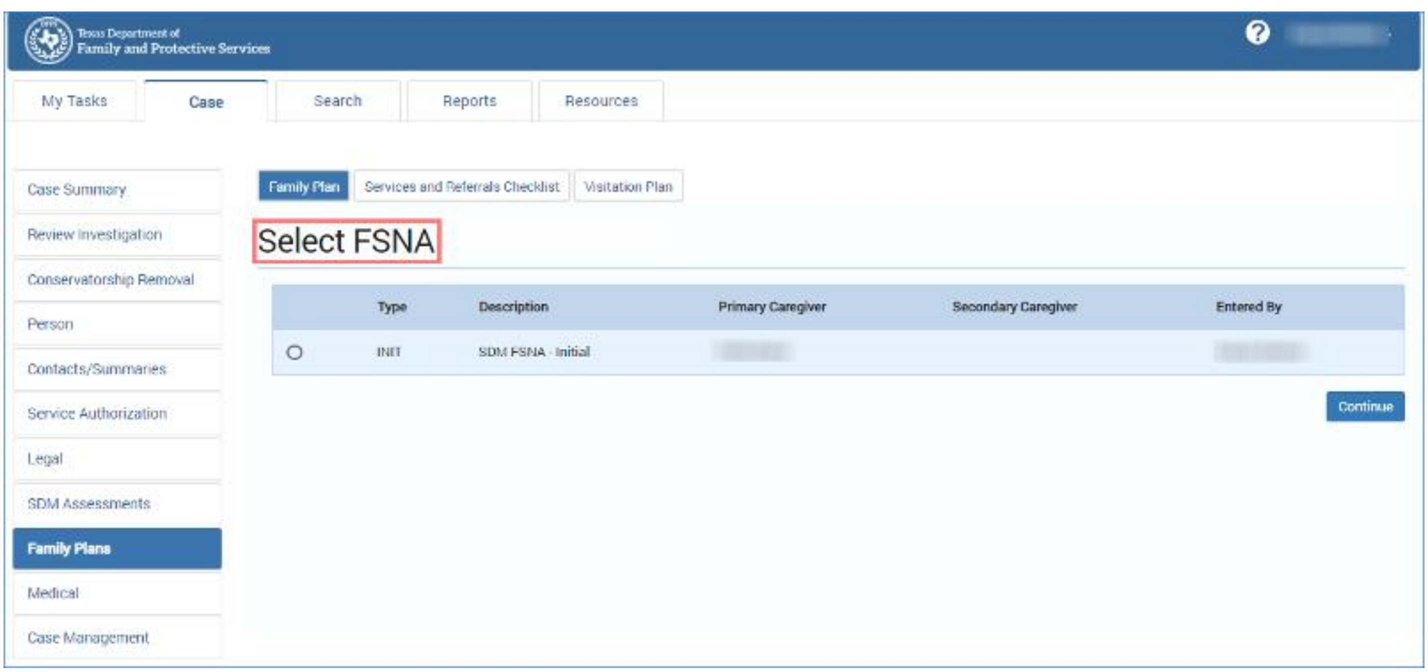


Family Plan List Page – Creating New Family Plans

1. Follow the steps below to create a new initial **Family Plan**:
2. On the **Family Plan List** page, locate the **Add** button at the bottom right of the page.
3. Selecting **Add** initiates the process of creating a **Family Plan** for the stage in which you are working (**FPR**).

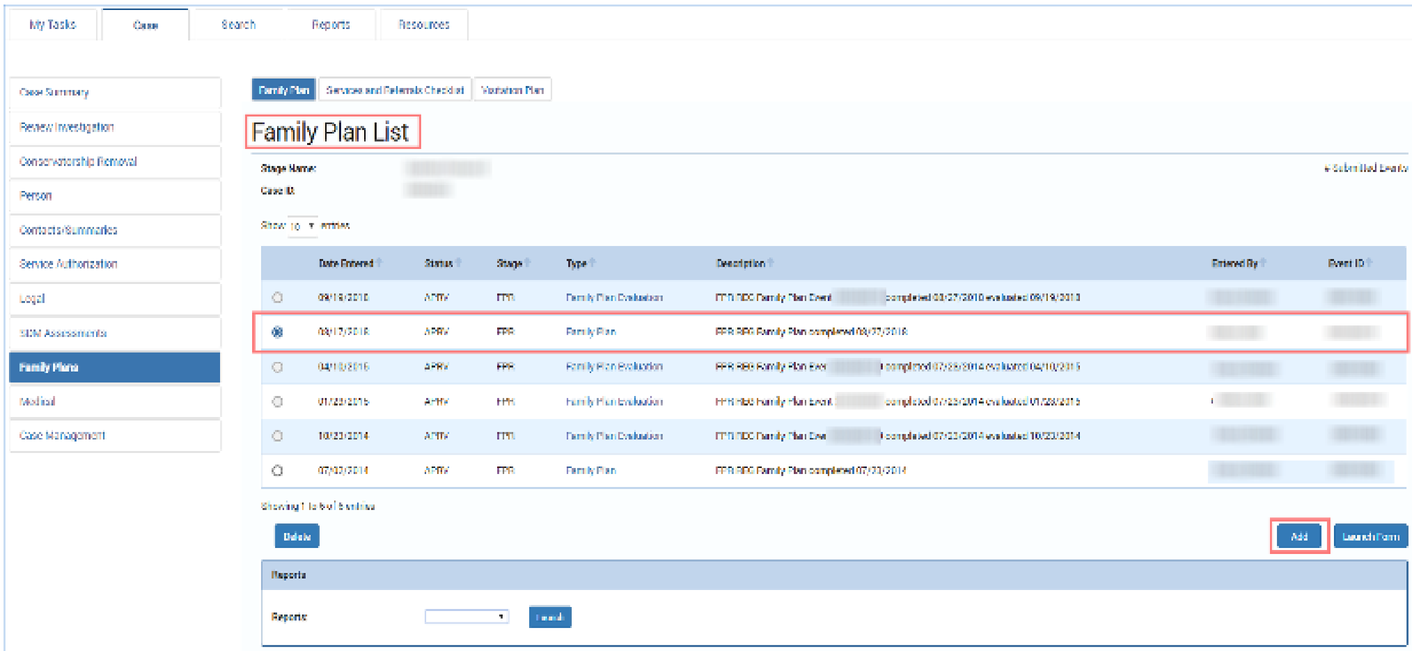


4. If no **Family Plan** exists for the Case ID, you will arrive at the new **Select FSNA** page, which is your first step in creating a new **Family Plan**. If no **FSNA** is listed on this page then it has to be created within the same stage for which a Family Plan needs to be created

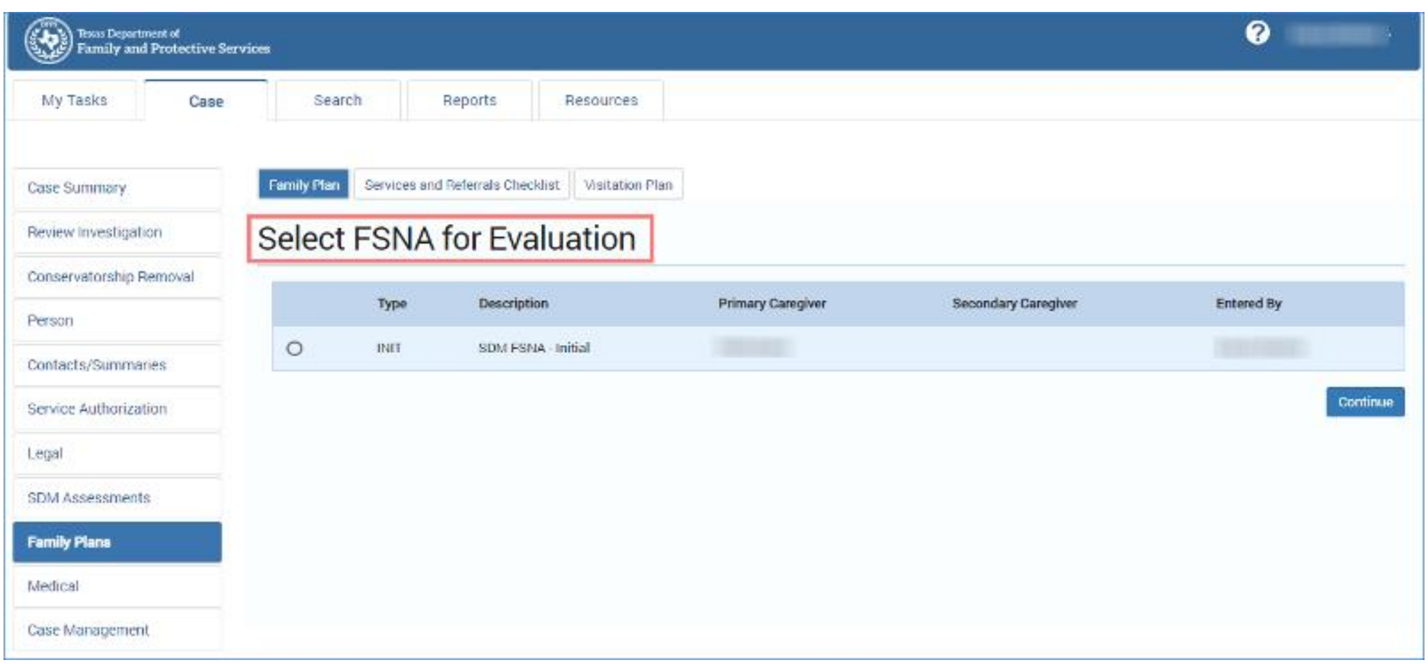


Family Plan List Page – Creating New Family Plan Evaluations

1. Follow the steps below to create a new **Family Plan Evaluation**:
2. 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 **FPR** stage and "APRV" status.
3. Locate the **Add** button at the bottom right of the page.
4. Selecting **Add** initiates the process of creating a **Family Plan Evaluation** for the stage in which you are working.

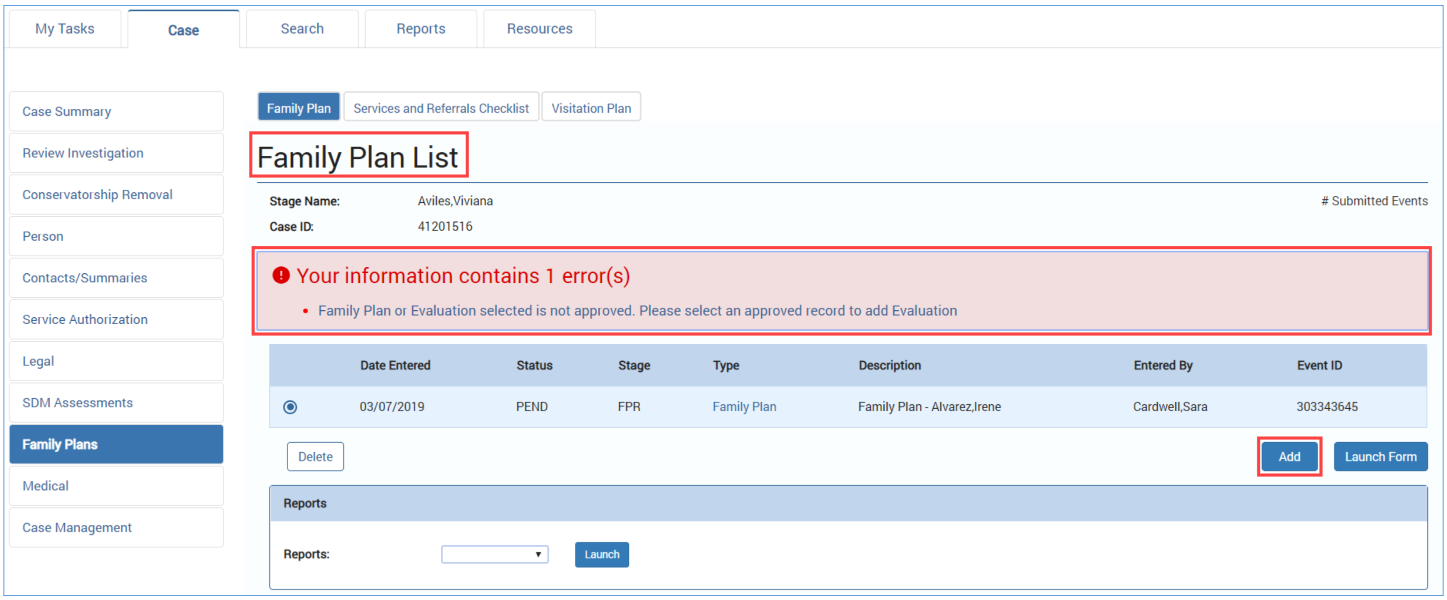


5. You arrive at the new **Select FSNA for Evaluation** page, which is your first step in creating a **Family Plan Evaluation**.



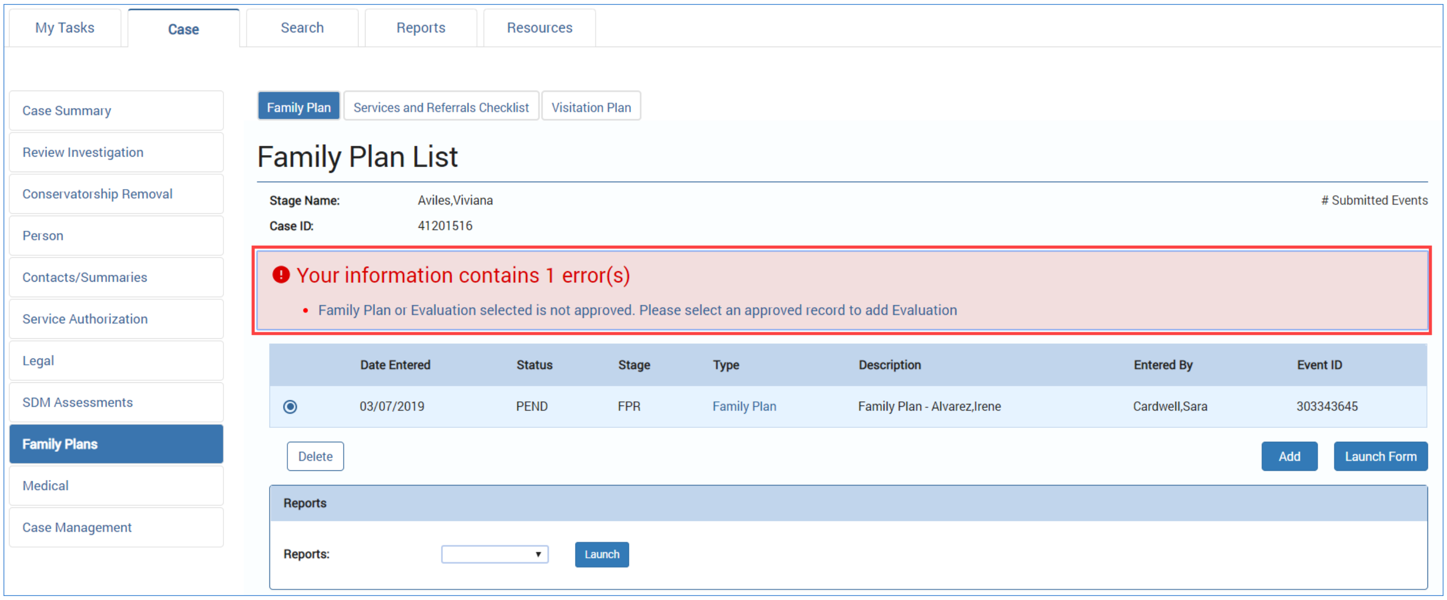
Family Plan List Page – Creating Family Plans and Family Plan Evaluations – Validations and Error Alerts

1. 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.
2. If your attempt to create a **Family Plan** or **Family Plan Evaluation** fails validations, you will be prevented from creating a new plan or evaluation, and will instead receive an error alert with the reason why.



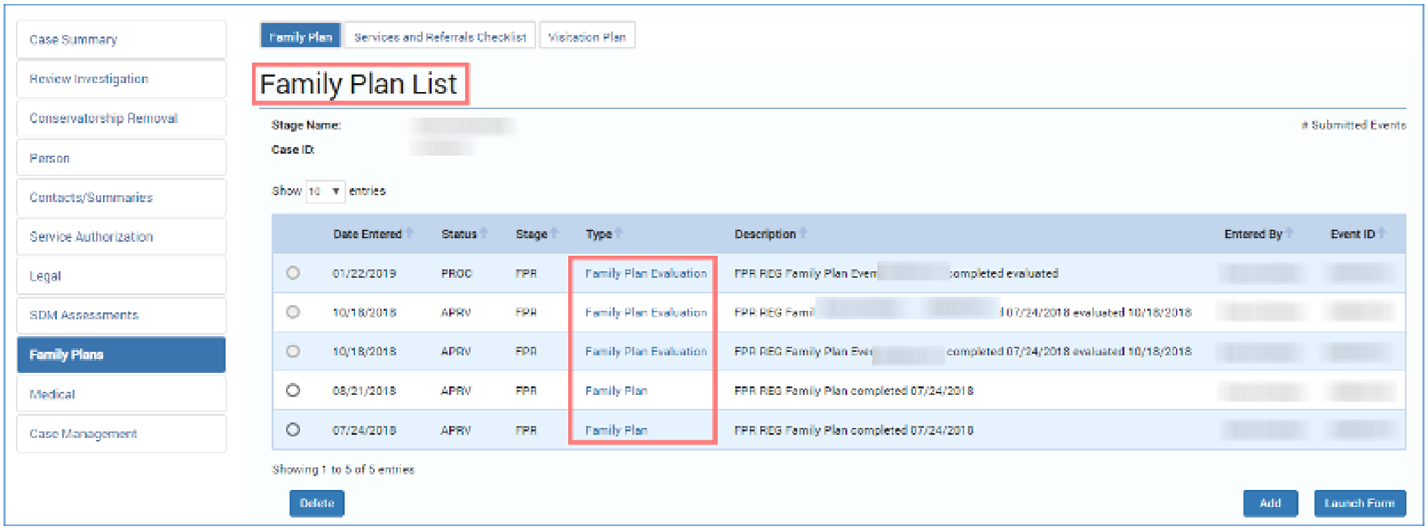
Family Plan List Page – Error Alert for Selecting a Family Plan or Evaluation Not in Approved (APRV) Status

If you select the radio button for a **Family Plan** or **Family Plan Evaluation** that is in "PROC," "COMP," or "PEND" status and select **Add**, you will receive an error alert that says: "Family Plan or Evaluation selected is not approved. Please select an approved record to add Evaluation".



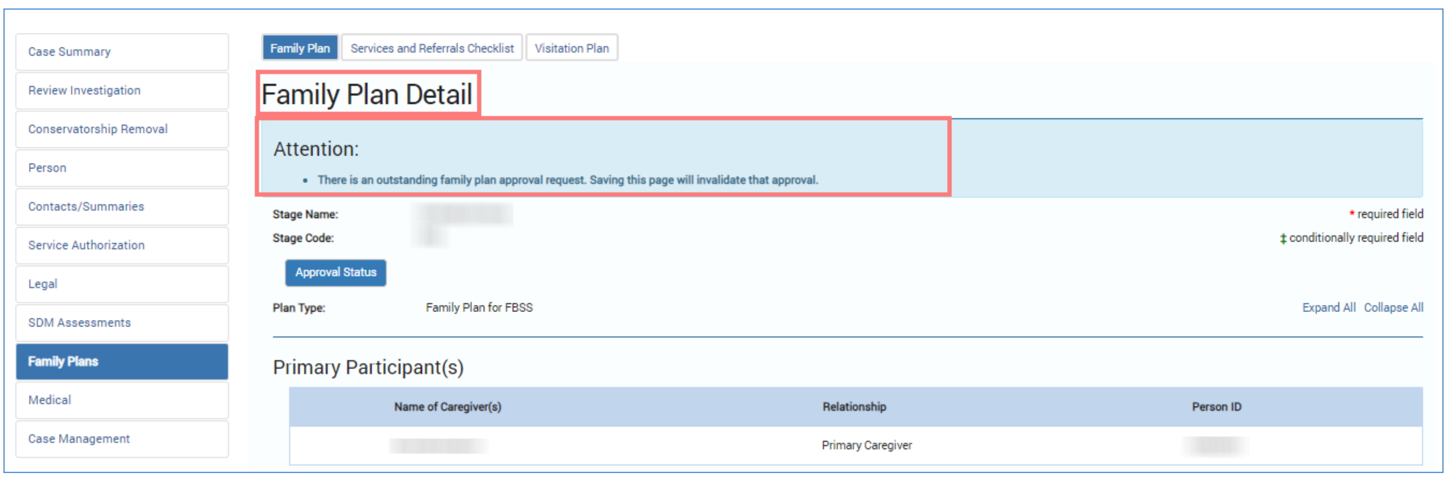
Family Plan List Page – Viewing and Editing Family Plans and Family Plan Evaluations

1. To view or edit an existing **Family Plan** from the **Family Plan List**, select the hyperlink to the **Family Plan** or **Family Plan Evaluation**.
2. 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.
3. 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.



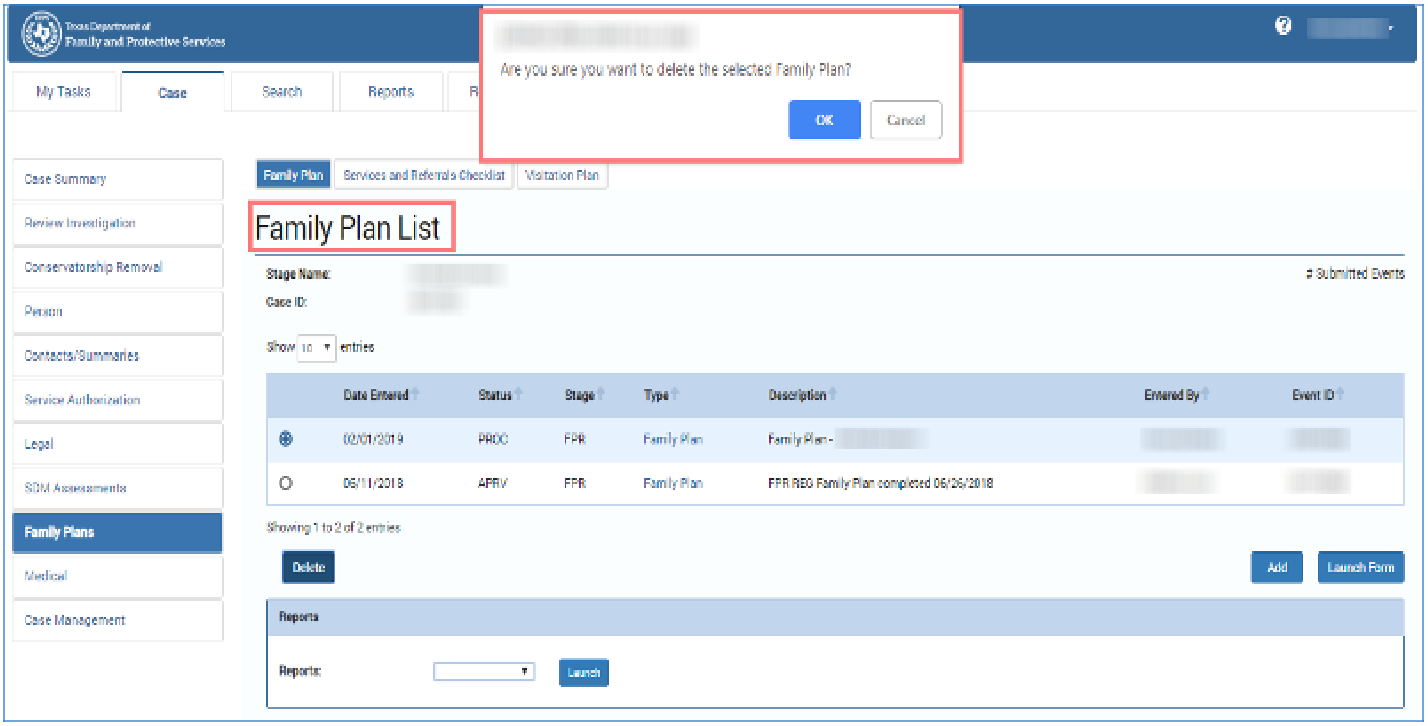
Editing Family Plans and Family Plan Evaluations in "PEND" or "COMP" Status

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 **Evaluation** page you will receive an alert message: “There is an outstanding family plan approval request. Saving this page will invalidate that approval".



Deleting Family Plans and Family Plan Evaluations in "PROC" Status

1. To delete a **Family Plan** or **Family Plan Evaluation**, it must have been created in IMPACT 2.0 and must be in "PROC" status.
2. Select the radio button next to the **Family Plan** or **Family Plan Evaluation** you wish to delete, and then select the **Delete** button.
3. An alert will warn: "Are you sure you want to delete the selected Family Plan?" (or Family Plan Evaluation.)
4. Select the **OK** button to delete the plan or evaluation, or the **Cancel** button to cancel.

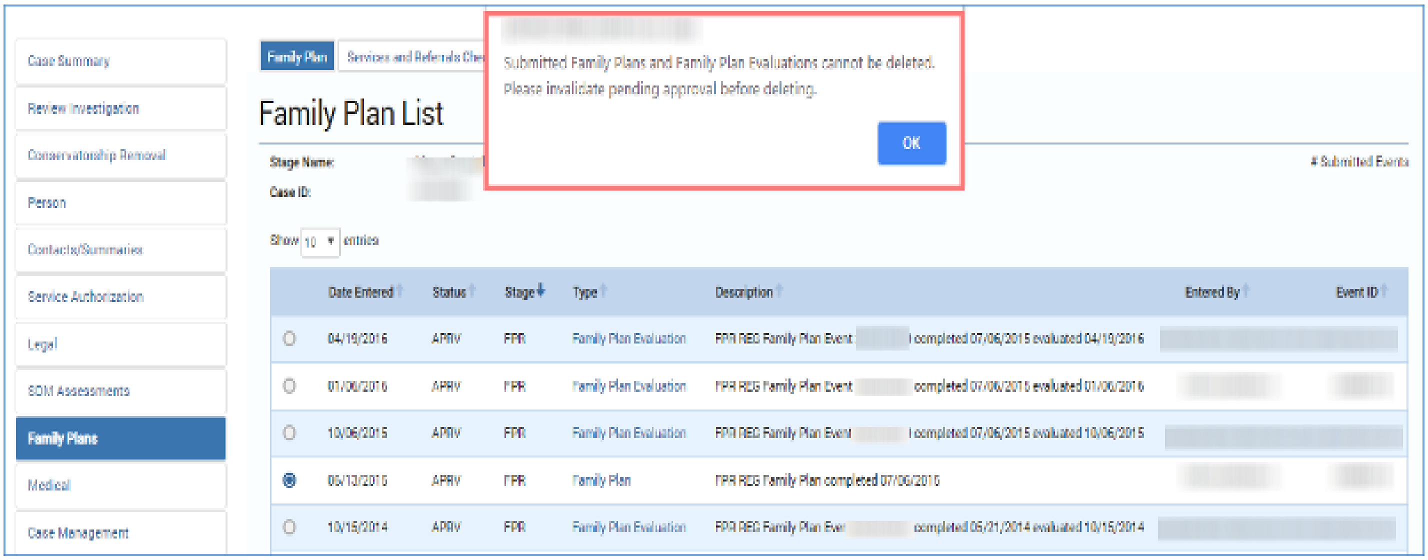


You Cannot Delete Family Plans and Family Plan Evaluations Initiated in Legacy IMPACT

You cannot delete a **Family Plan** or **Family Plan Evaluation** initiated in legacy IMPACT, even if it is in "PROC" status.

You Can Only Delete a Family Plan That Is in "PROC" Status Created in IMPACT 2.0

1. If you attempt to delete any **Family Plan** or **Family Plan Evaluation** that is in "COMP", "PEND" or “APRV” status, IMPACT 2.0 will generate the alert message: "Submitted Family Plans and Family Plan Evaluations cannot be deleted. Please invalidate pending approval before deleting."
2. 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 to return it to "PROC" status. Any change on the plan that is saved will invalidate the approval and return it to "PROC" status, where it can be deleted.



Family Plan of Service FBSS/FPR – FSNA Page

Contents

Select FSNA Page – Introduction

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

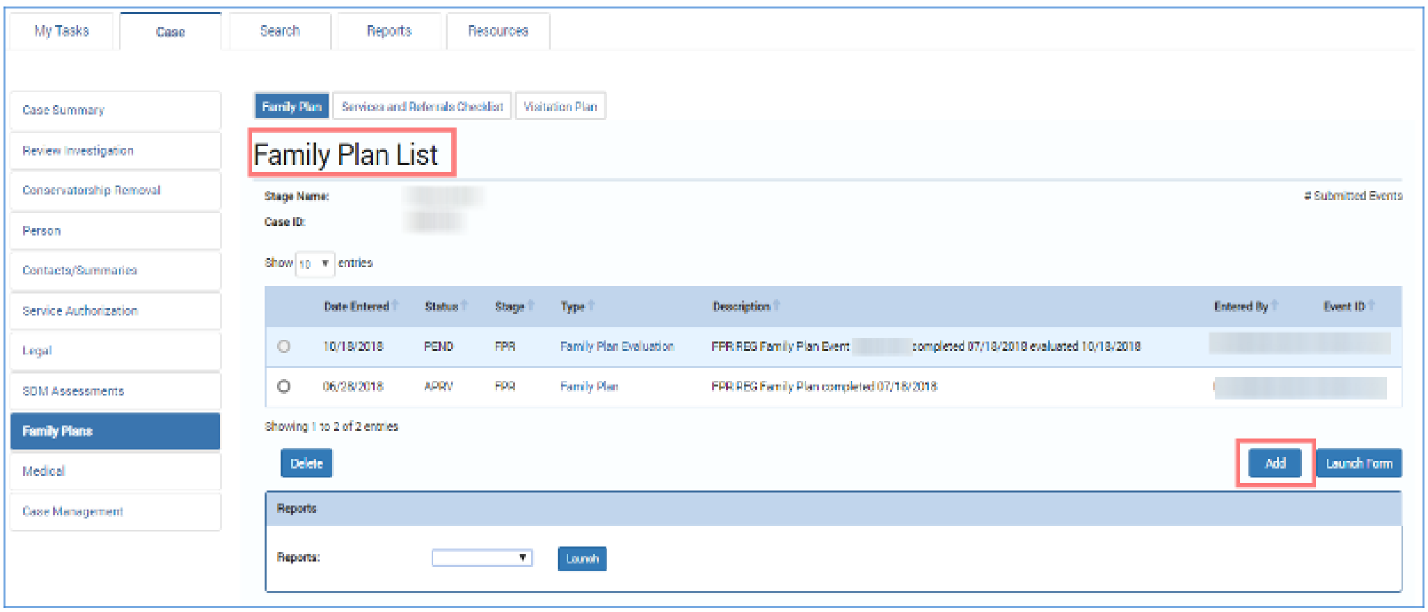
The **Family Plan** you are creating will have designated fields that are prefilled from information in the **Family Strengths and Needs Assessment** (**FSNA**). Therefore, a valid **FSNA** must exist.

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

Stages Impacted: FPR

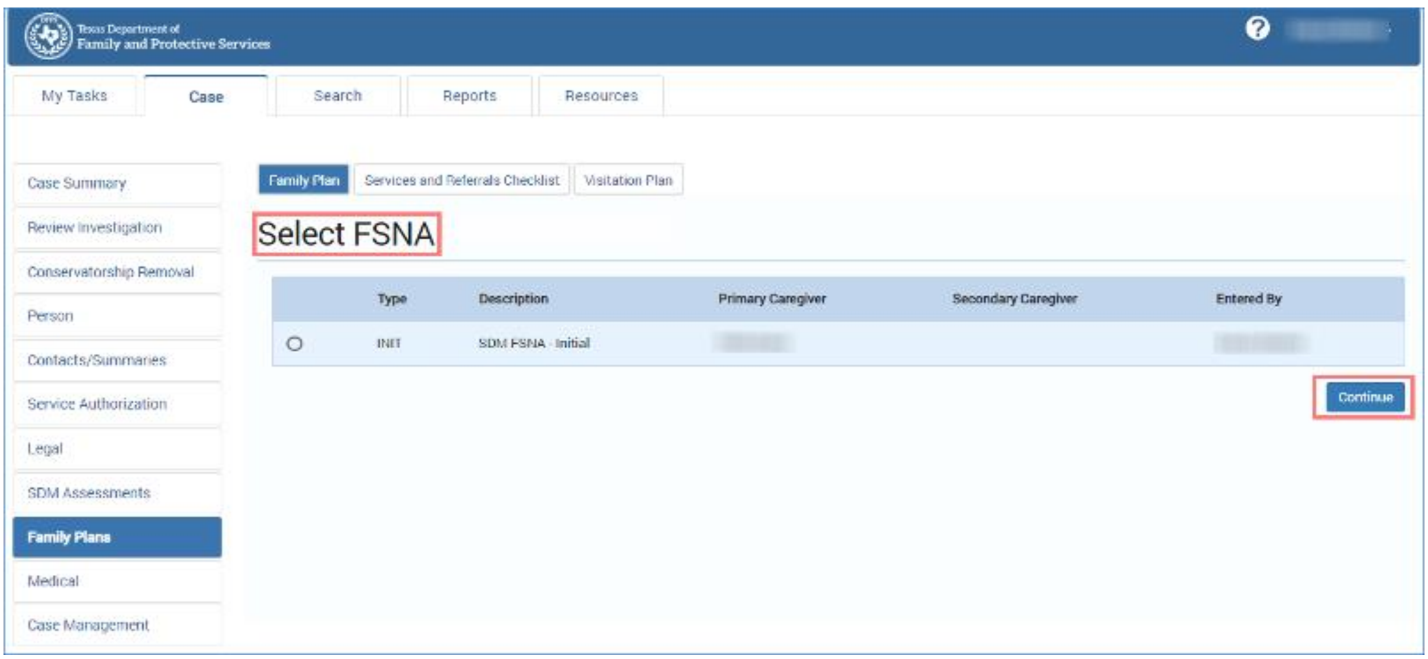
Select FSNA Page – Accessing and Using the Page

1. Follow these steps to access and use the **Select FSNA** page:
2. Select **Add** on the **Family Plan List** page to create a new **Family Plan**.



3. You will arrive at the **Select FSNA** page.
4. Examine the **Select FSNA** page and the listed **FSNAs**. Recognize you will only see valid **FSNAs** in the stage in which you are working (**FPR** stage.)
5. Recognize the **FSNAs** are sorted by approval/completion date. Those **FSNAs** with the most recent date are displayed at the top of the list.
6. Locate the radio button to select the desired **FSNA**.
7. Locate the **Continue** button, which will redirect you to the **Family Plan Detail** page with designated fields prefilled from the **FSNA** you selected.

Note: *An FSNA is deemed valid for 30 calendar days after it has been completed or approved.*

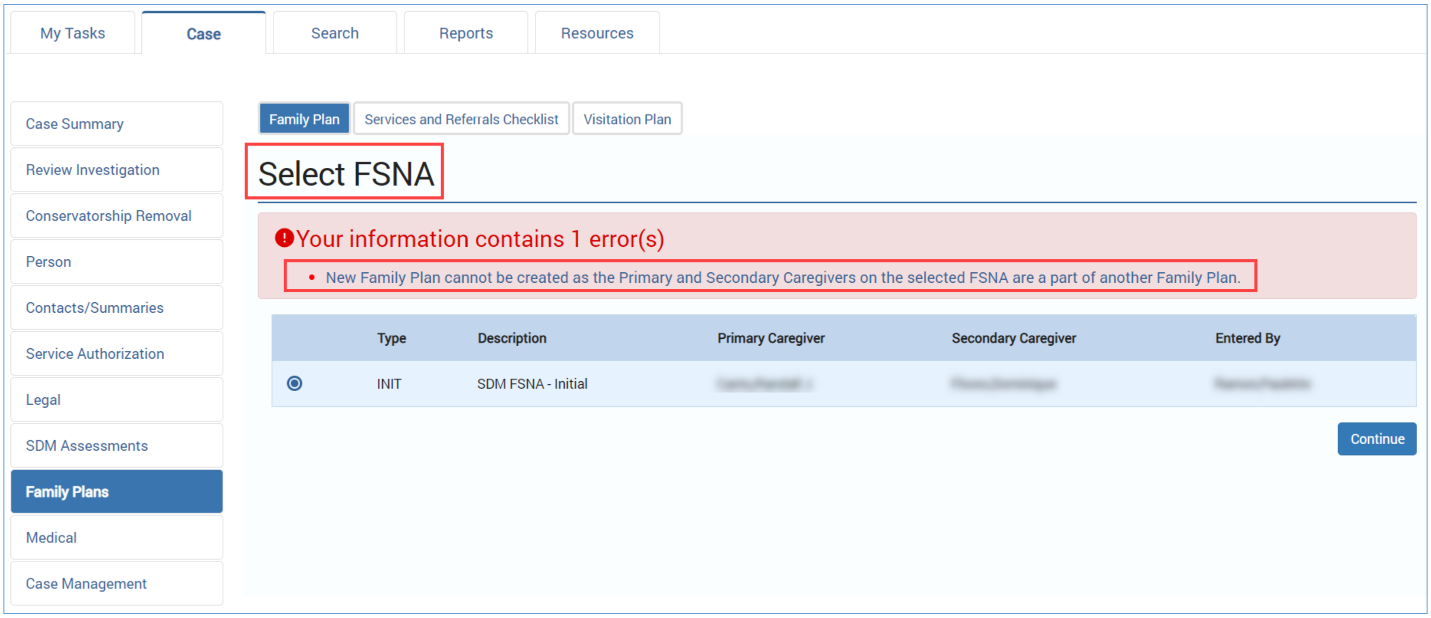


Select FSNA Page – Validation Checks

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

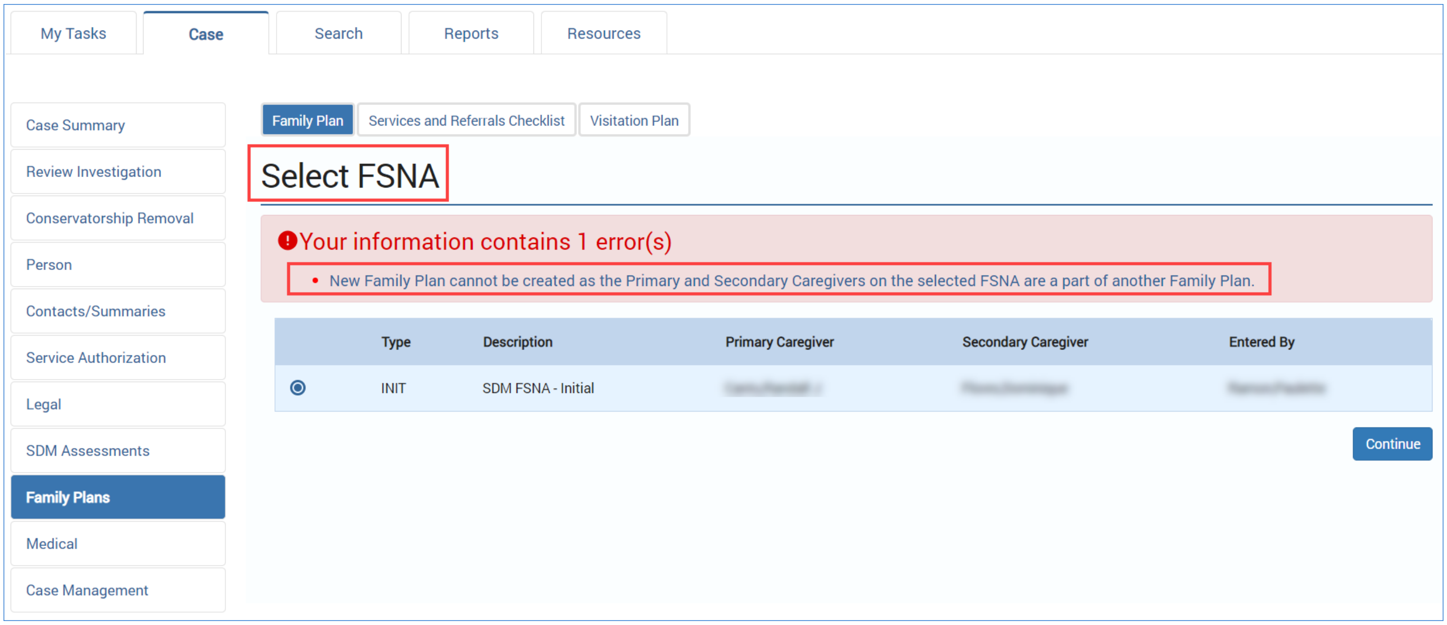
Select FSNA Page – Validation Error Message – Both Caregivers Are Participants on Another Plan

IMPACT 2.0 checks to see if both the primary and secondary caregivers 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**.



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

IMPACT 2.0 also checks to see if either the **Primary Caregiver** or **Secondary Caregiver** 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.



Texas Department of
Family and Protective Services

Family Plan of Service FBSS/FPR – Family Plan Detail Page

Contents

Family Plan Detail Page – Creating & Completing an Initial Family Plan

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

The **Family Plan Detail** page for **FPR** stage will have fields prefilled from the most recent approved/completed and valid **FSNA** selected from the **Select FSNA** page where a caregiver selected in the **Family Plan** matches either one or both the **Primary Caregiver** or **Secondary Caregiver** in the **FSNA**.

You can modify some of the prefilled fields, and also add FSNA **Domains**, **Required Actions**, and **Resources** as needed for each caregiver and child.

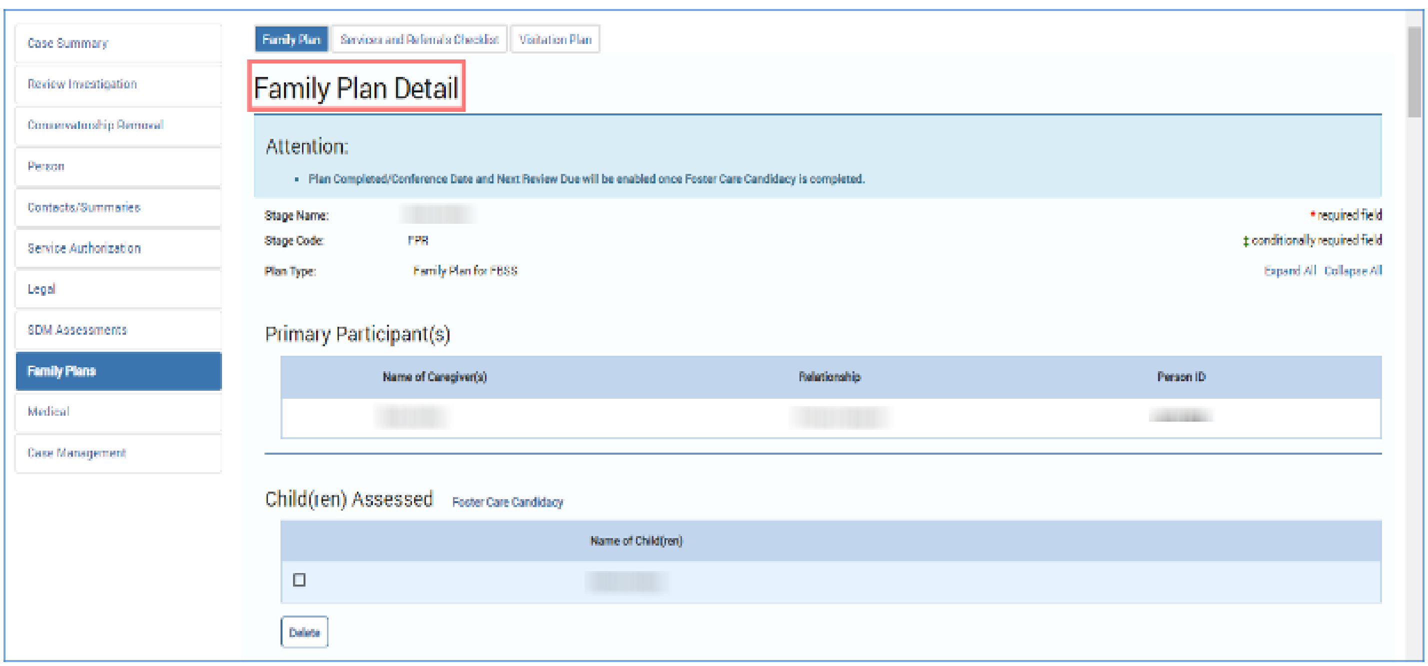
You will also be able to launch a **Family Plan** form from the **Family Plan Detail** page, as well as download it in PDF format. This new form features *electronic signature* capabilities!

Stages Impacted: FPR

Family Plan Detail Page – Create an Initial Family Plan

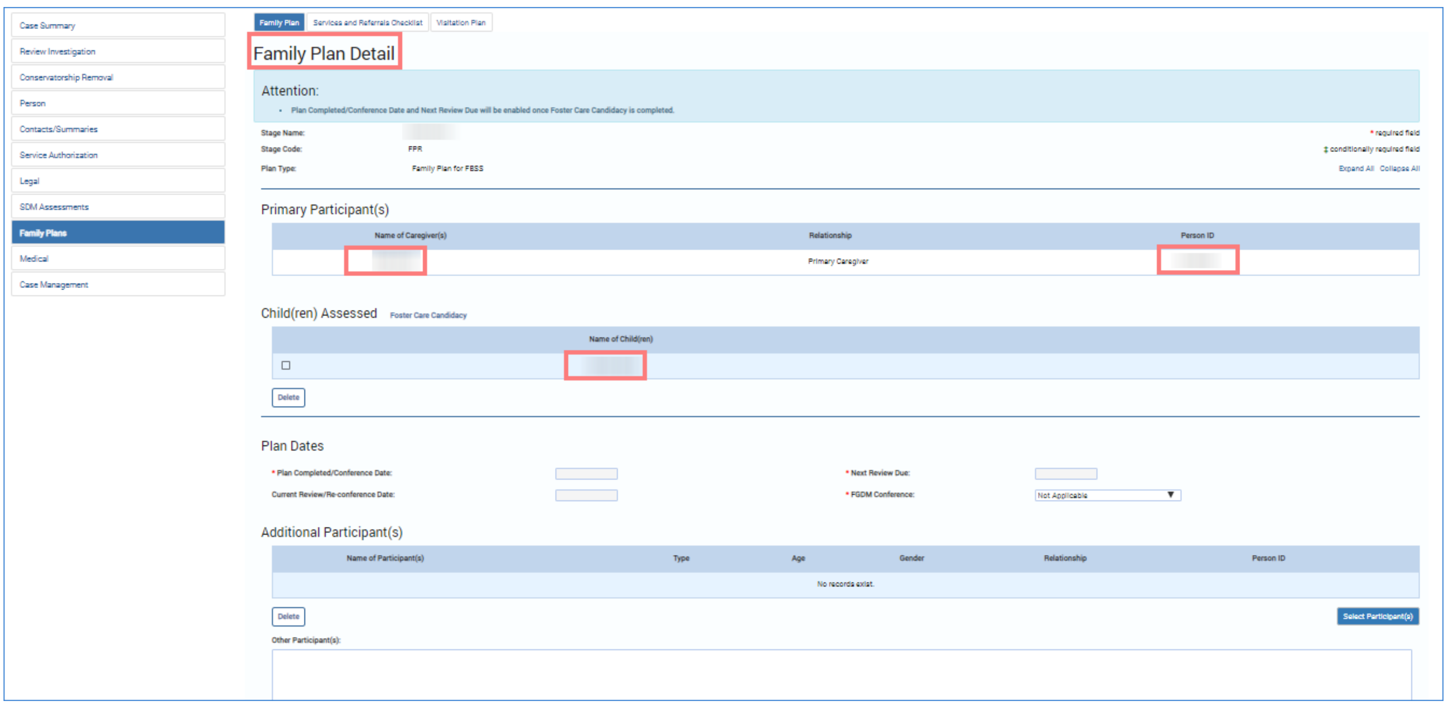
1. Select the **Add** button on the **Family Plan List** page.
2. Select a valid approved/completed **FSNA** from the **Select FSNA** page, then select the **Continue** button.
3. You will arrive at the **Family Plan Detail** page.

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



Family Plan Detail Page – Prefilled Fields

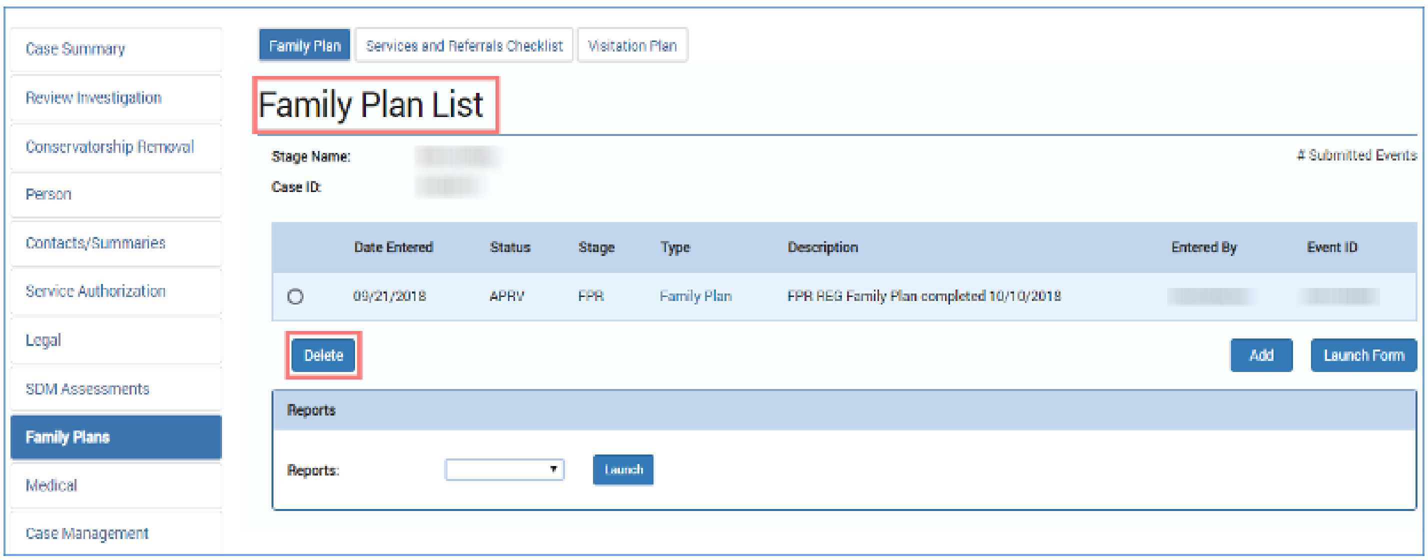
1. Read the informational message as follows: "Attention: The Plan Completed/Conference Date and next review due will be enabled once the Foster Care Candidacy is completed."
2. Recognize the fields prefilled by IMPACT 2.0 (**Stage Name**, **Stage Code**, and **Plan Type**).
3. If the **FSNA** was approved by exception, then it will display "No Information Found in Family Strengths and Needs Assessment" in various fields on the initial **Family Plan**.
4. Locate the fields prefilled from the FSNA (**Name of Caregiver, Relationship, Person ID, and Names of Child(ren).** In addition, information from the **FSNA** prefills portions of the following sections: **Child(ren) Strengths, Caregiver(s) Strengths, Child(ren) Needs and Actions to Address** and **Caregiver(s) Needs**.
5. Recognize which fields are editable vs. those that are not.
6. Once the participants have been prefilled from the **FSNA**, you can delete one **Primary Participant**. However, the plan must have at least one **Primary Participant**.
7. Once the children assessed have been prefilled from the **FSNA**, you can delete children from the **Child(ren) Assessed** section. The plan must have at least one child in this section.



Completing a Family Plan – Deleting Primary Participants and Child(ren) Assessed

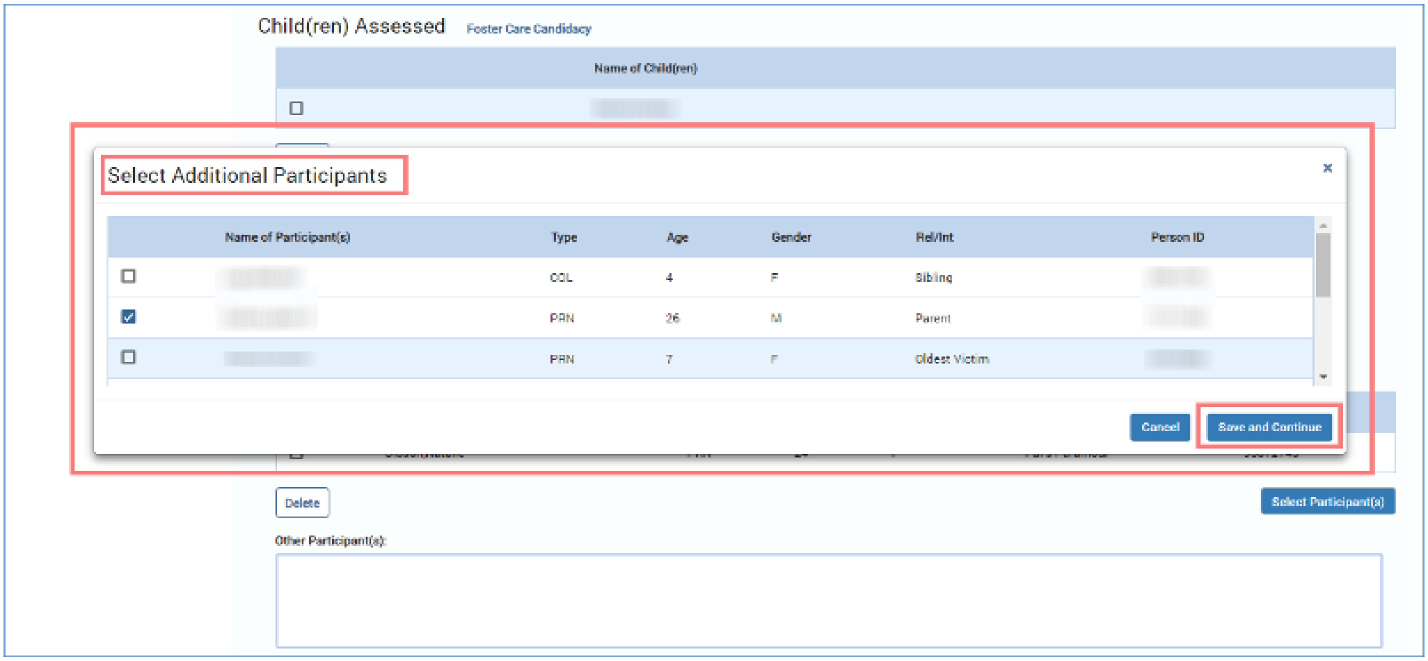
1. Once the participants have been prefilled from the **FSNA**, you can delete one **Primary Participant**. However, the plan must have at least one **Primary Participant**.
2. Once the children assessed have been prefilled from the **FSNA**, you can delete children from the **Child(ren) Assessed** section. The plan must have at least one child in this section.

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 all but one, the* ***Delete*** *button will no longer display, as the plan must have at least one (1)* ***Primary Participant****.*

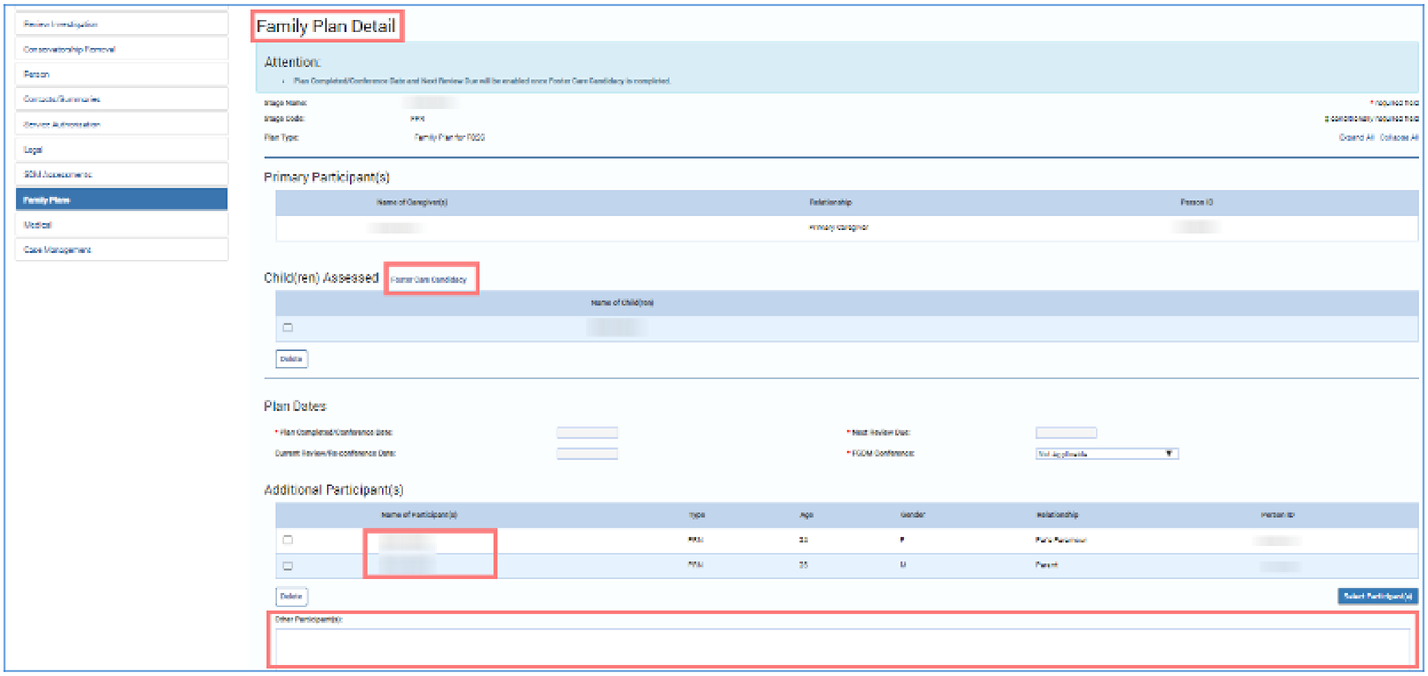


Completing a Family Plan – The Select Additional Participants Page

1. Select the **Select Participants** button to generate the **Select Additional Participants** page in a separate pop-up window on your screen.
2. Recognize the participants listed on this 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 one or more participant's names and then select the **Save and Continue** button to return to the **Family Plan Detail** page.

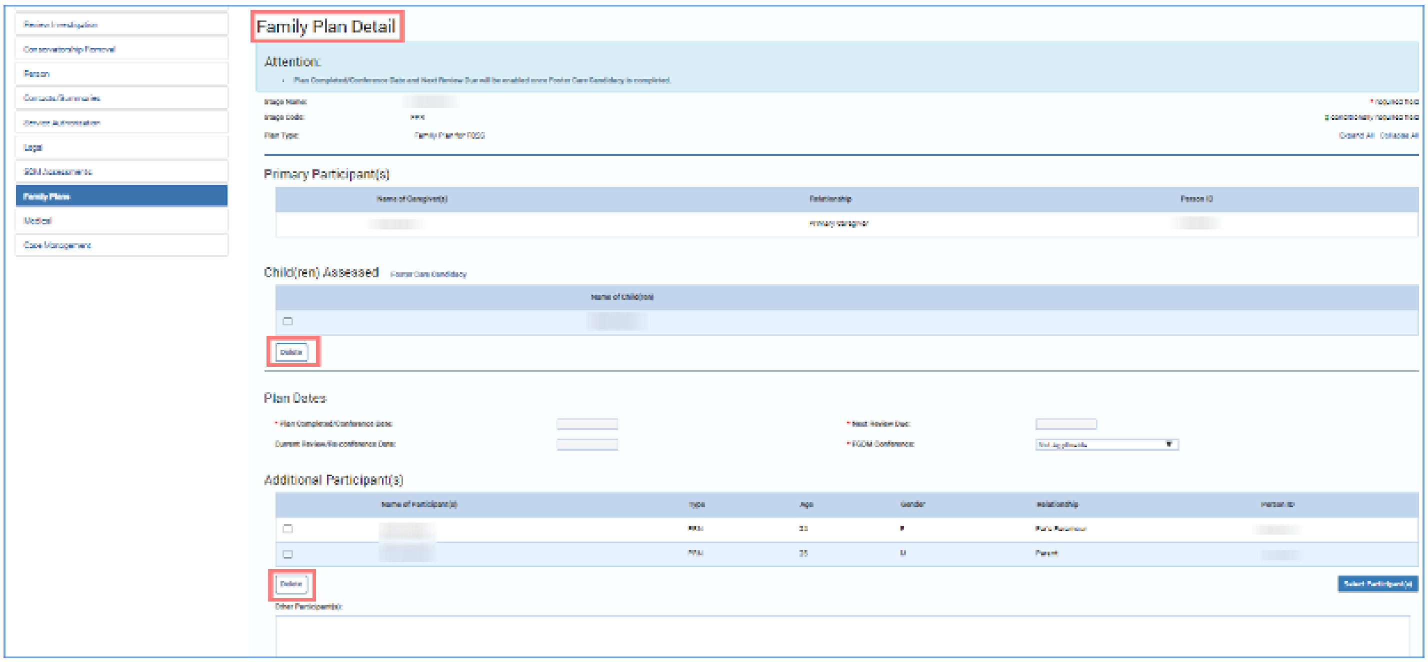


4. The selected participant(s) is added to the **Additional Participant(s)** section of the **Family Plan Detail** or **Family Plan Evaluation** page.
5. Within the textbox for **Other Participants**, you may add participants who are not on the Person List and not listed on the plan or evaluation.
6. Locate the **Foster Care Candidacy** link to the right of the **Child(ren) Assessed** heading. This will redirect you to the **Foster Care Candidacy** page.



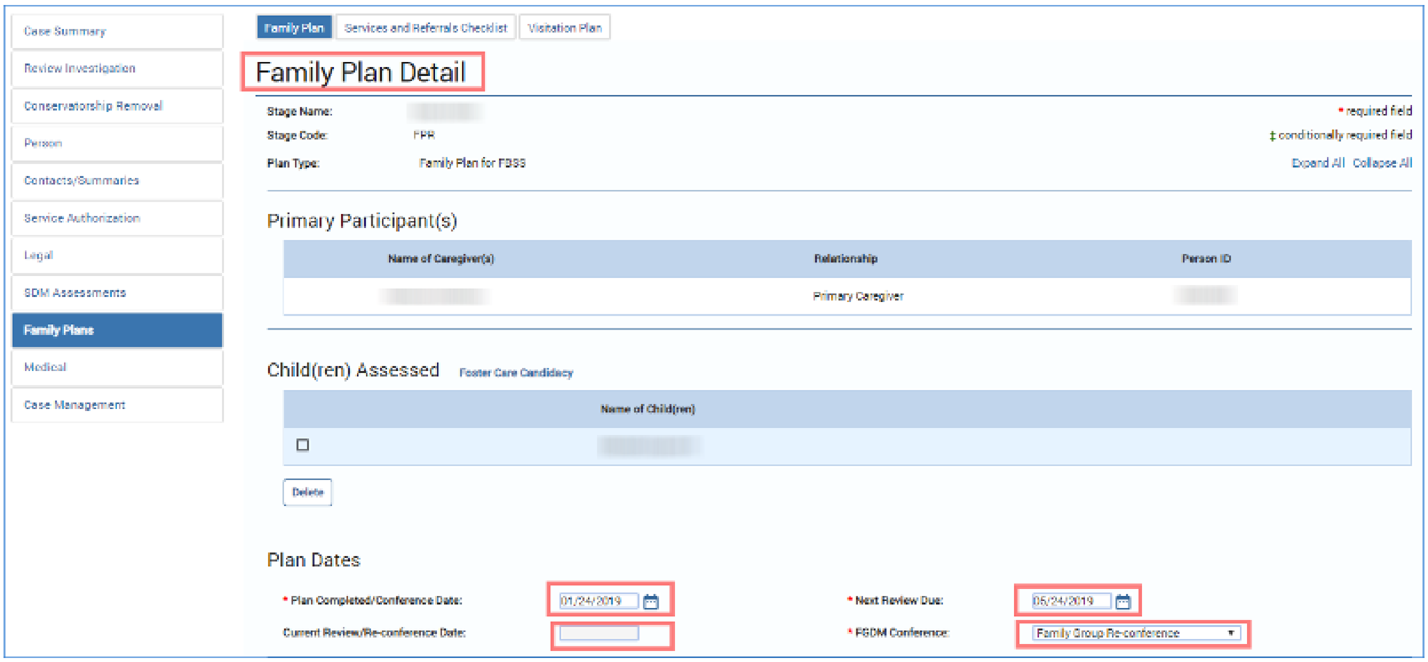
Deleting Additional Participants

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



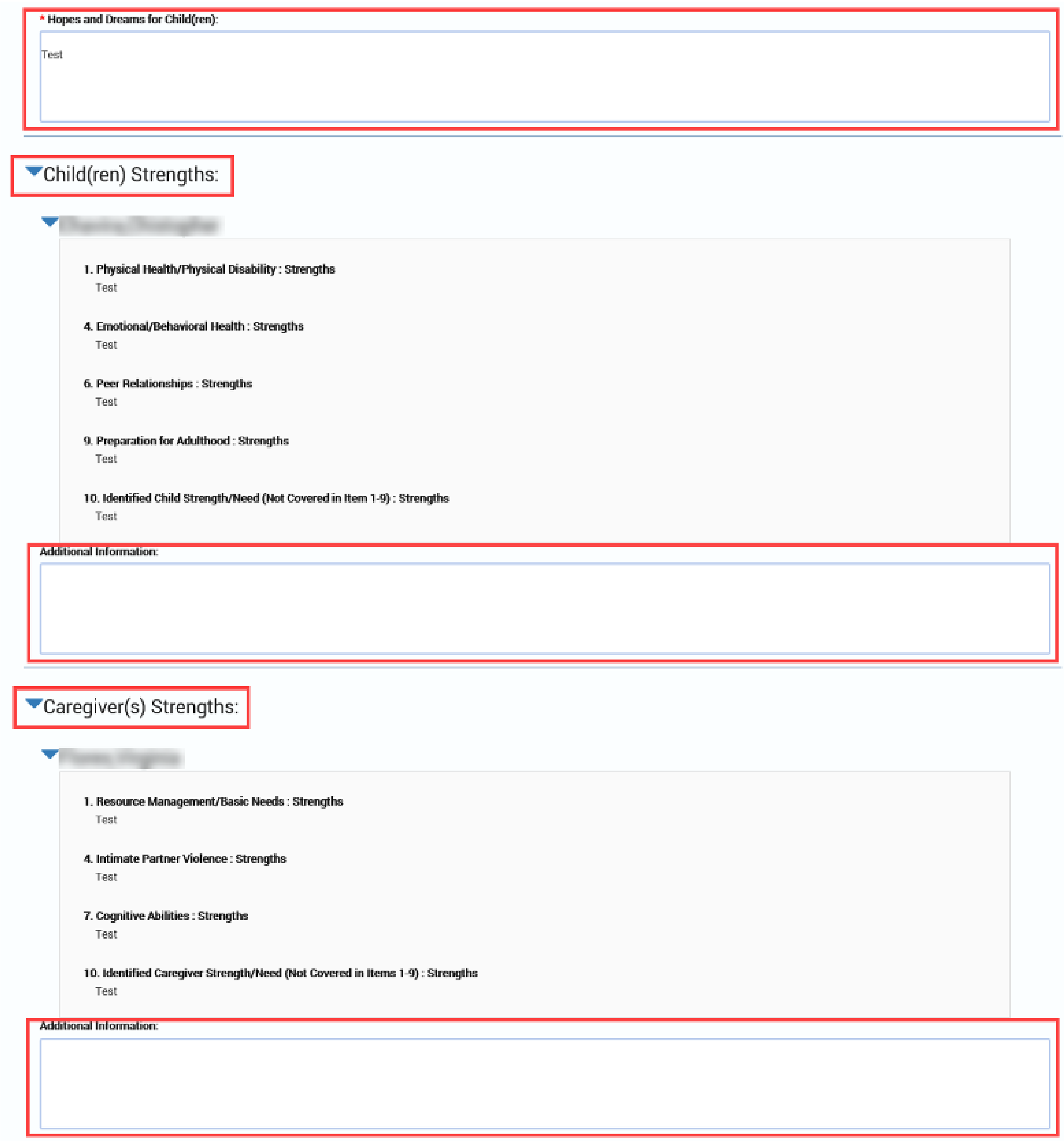
Completing the Family Plan – Plan Dates

1. Select a date from the date selector icon, or enter a date, for **Plan Completed/Conference Date**. This date cannot be a date prior to the start of the **FPR** stage.
2. The **Next Review Due** field prefills with a date 180 days after the date you entered for **Plan Completed/Conference Date**. The field is editable to an earlier date, but cannot exceed 180 days.
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 initial **Family Plans**. It is enabled only for **Family Plan Evaluations**.

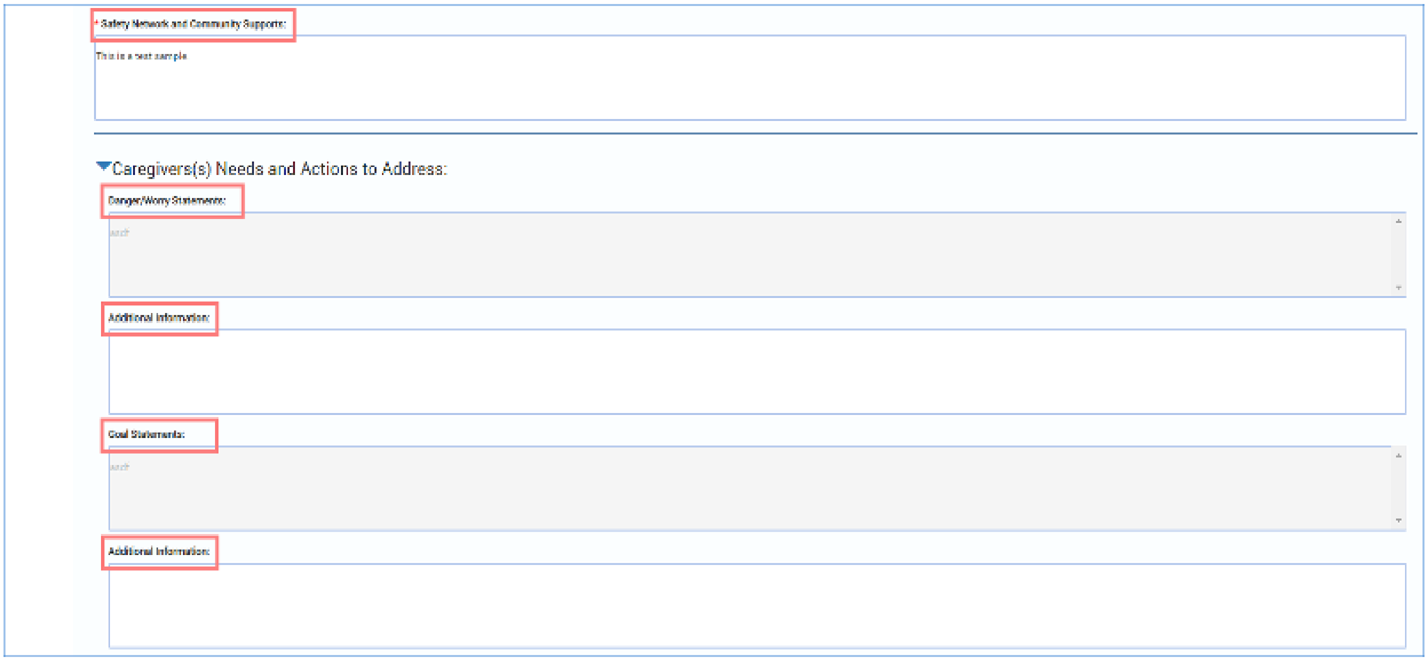


Completing the Family Plan – Prefilled Fields vs. Manually Entered

1. Although many of the fields of the **Family Plan** are prefilled from the **FSNA**, there are others into which you must enter information.
2. Enter information for **Hopes and Dreams for Child(ren)**.
3. Locate the **Child(ren) Strengths** and **Caregiver(s) Strengths,** and recognize these fields are prefilled from the **FSNA**. However, you can also provide additional information in the **Additional Information** textboxes.

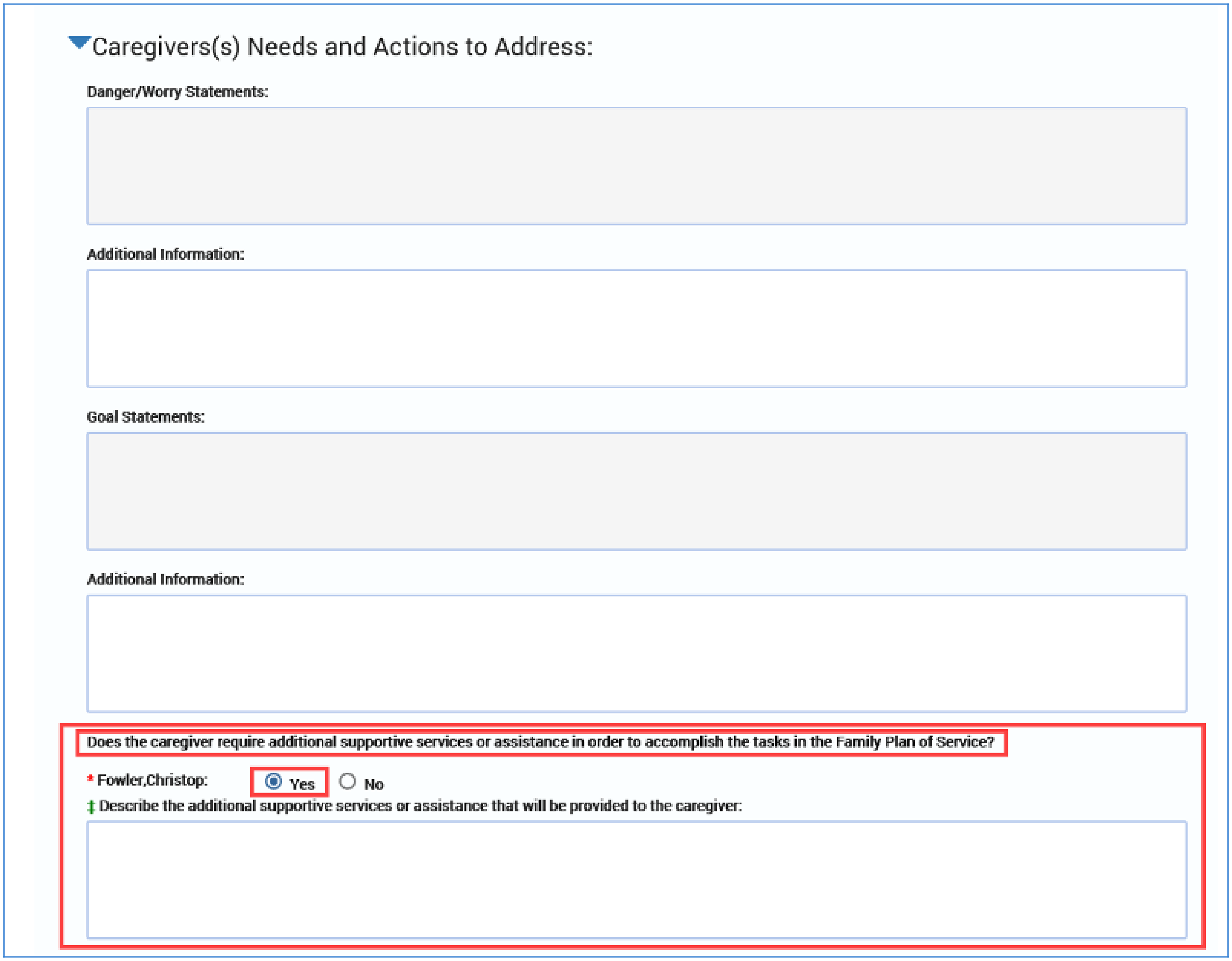


4. Locate the field for **Safety Network and Community Supports** and recognize the designated textbox is not prefilled from the **FSNA**; however, it is a required field.
5. Locate the fields for **Danger/Worry Statements** and **Goals Statements** and recognize these fields are prefilled from the **FSNA**.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



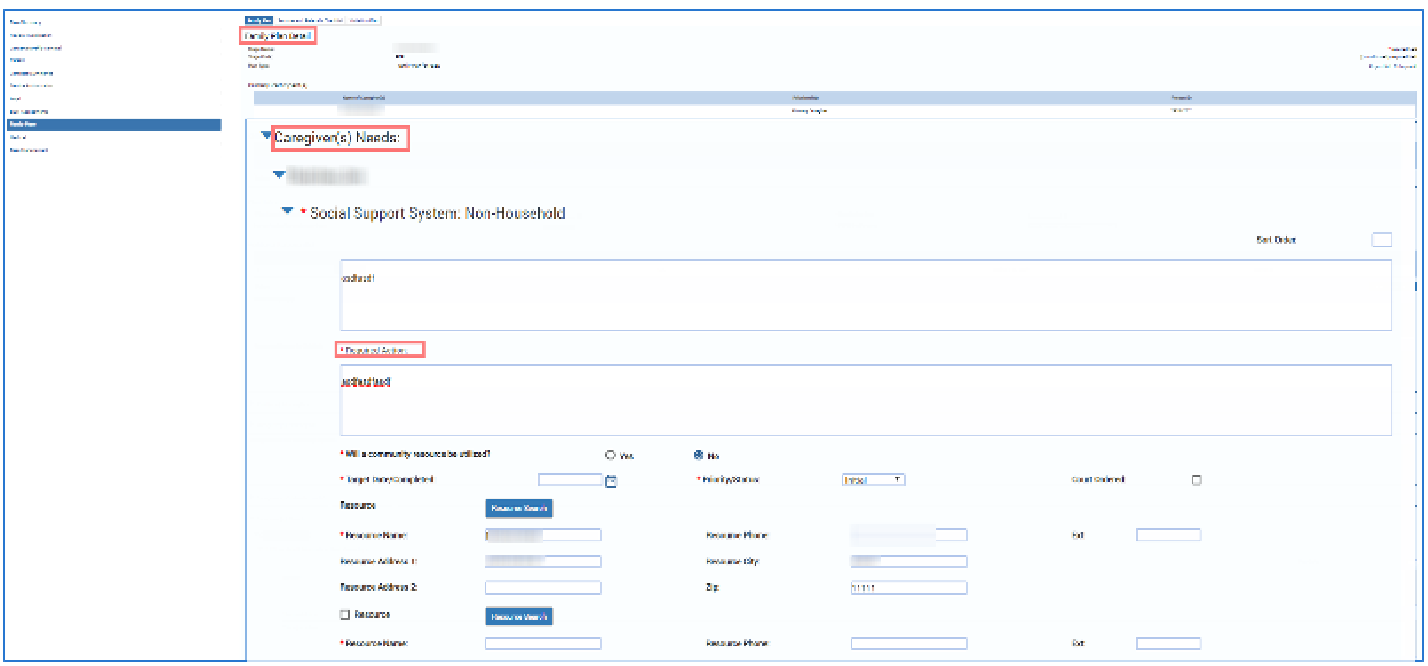
Completing the Family Plan – Conditionally Displayed Fields for Additional Supportive Services and Assistance for Caregivers

1. Locate the field *"Does the caregiver 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 caregiver."* Once triggered, the field is required and it must be completed.

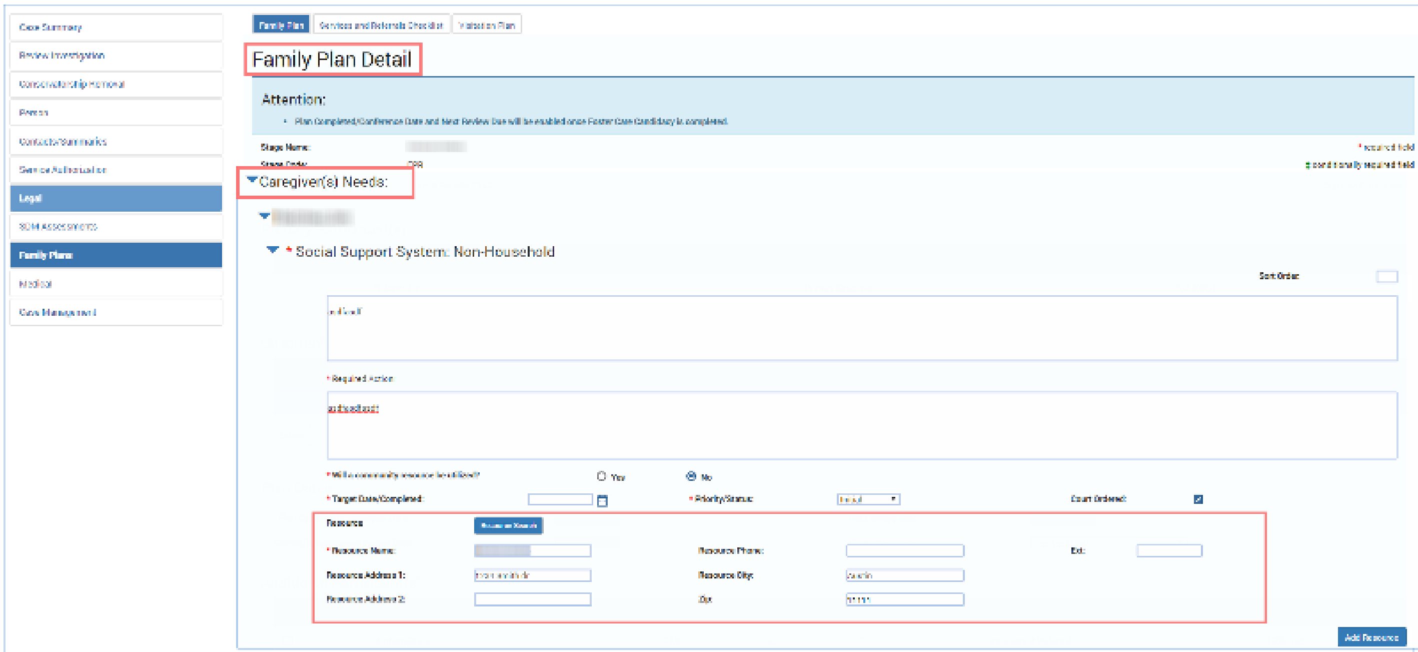


Completing the Family Plan – Caregiver(s) Needs

1. Locate the **Caregiver(s) Needs** section. This section prefills with only those domain names and their accompanying text that are marked as "Needs Identified" in the associated **FSNA**.
    - **Needs Domains** which are prefilled from the **FSNA** or are manually added can be deleted from the **Family Plan**. At least one caregiver must have a domain marked "Needs Identified" on the associated **FSNA**.
    - Every **Needs Domain** must have at least one **Required Action** associated with it.
    - **Required Action** fields prefilled from the associated **Family Plan Detail** or **Family Plan Evaluation** page cannot be deleted on the **Family Plan Evaluation** page.
    - If more than one **Required Action** is associated with a **Needs Domain** and it has been manually added, it can be deleted.
2. Provide the required information for the **Required Action** 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.



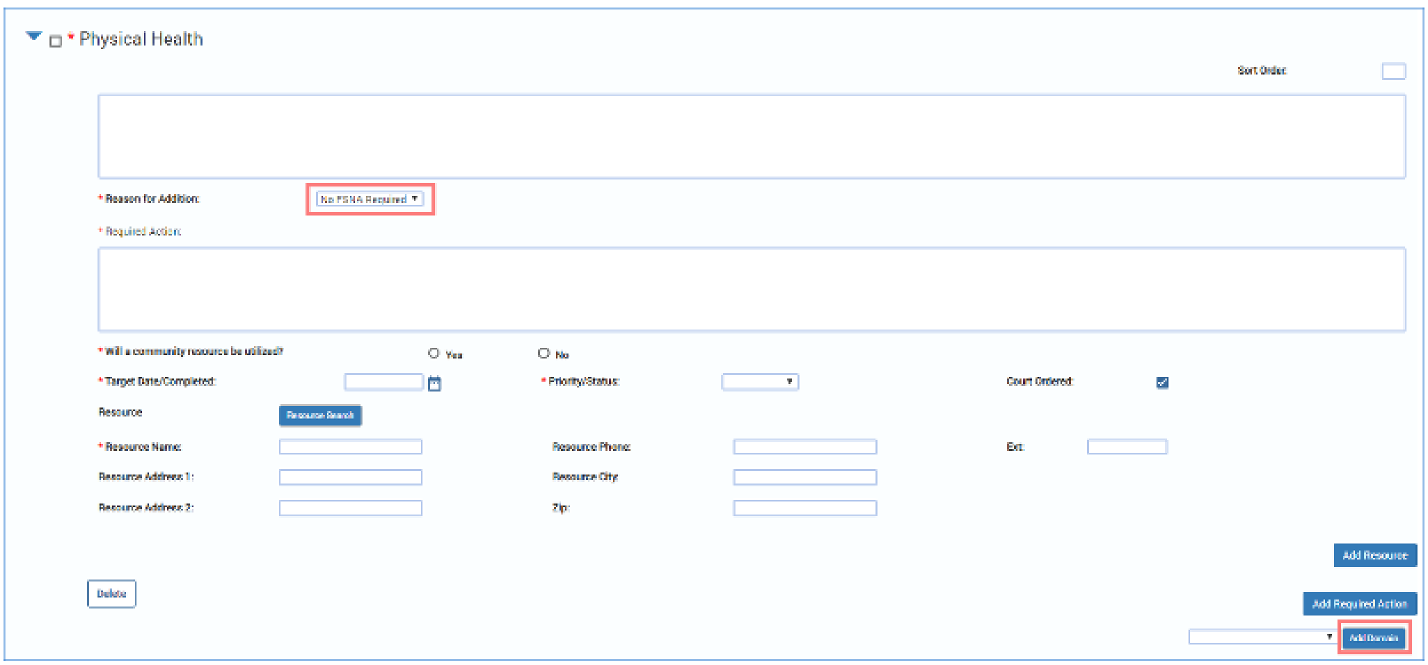
4. Recognize each of your **Needs Domains** has a corresponding **Resource,** which can be manually entered, or prefilled via the **Resource Search** button.
5. Locate the **Resource Search** button. Selecting this button performs a search on **Resources** for a **Needs Domain** and **Required Action**. Information from the **Resource** record, such as name, address, and phone number will prefill, and is user editable. Although you will be redirected to the **Resource Search** page, your information on the **Family Plan** will be retained.
6. Locate the **Add Resource** button. This generates another **Resource** section, including its corresponding **Resource Search** button.
7. Locate the **Add Required Action** button. Selecting this button opens another text box that will require information on additional **Required Action**.



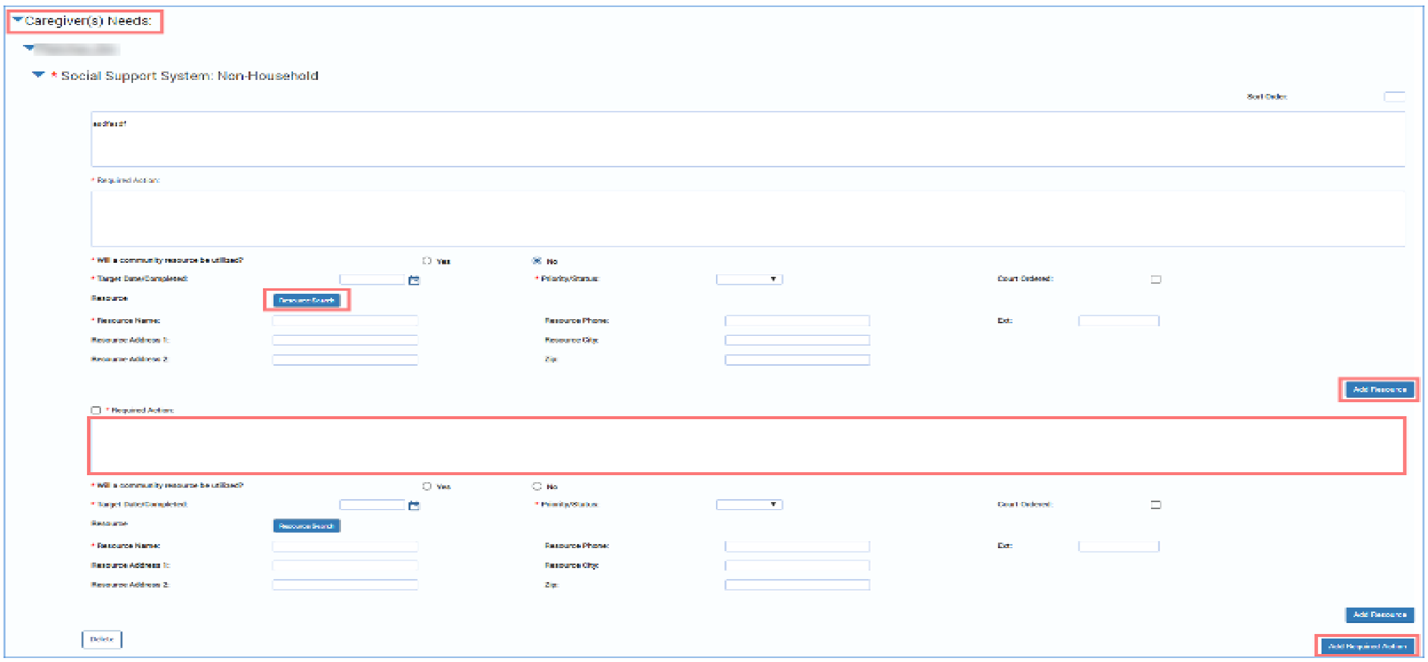
Completing the Family Plan – Adding a Needs Domain, Required Action and Resource

1. At the bottom of the section for each **Caregiver(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 domain, it triggers corresponding fields to appear, including a domain text box, **Required Action, Resource, and Sort Order.** Except for **Sort Order,** you must complete these fields for every domain added.

***Note**: A **Needs Domain** that exists for a Caregiver or Child on the **Family Plan Detail** page cannot be added to the page for the same person. The **Add Domain** dropdown will only display those domains that are <u>not</u> listed on the current plan for the same person.*

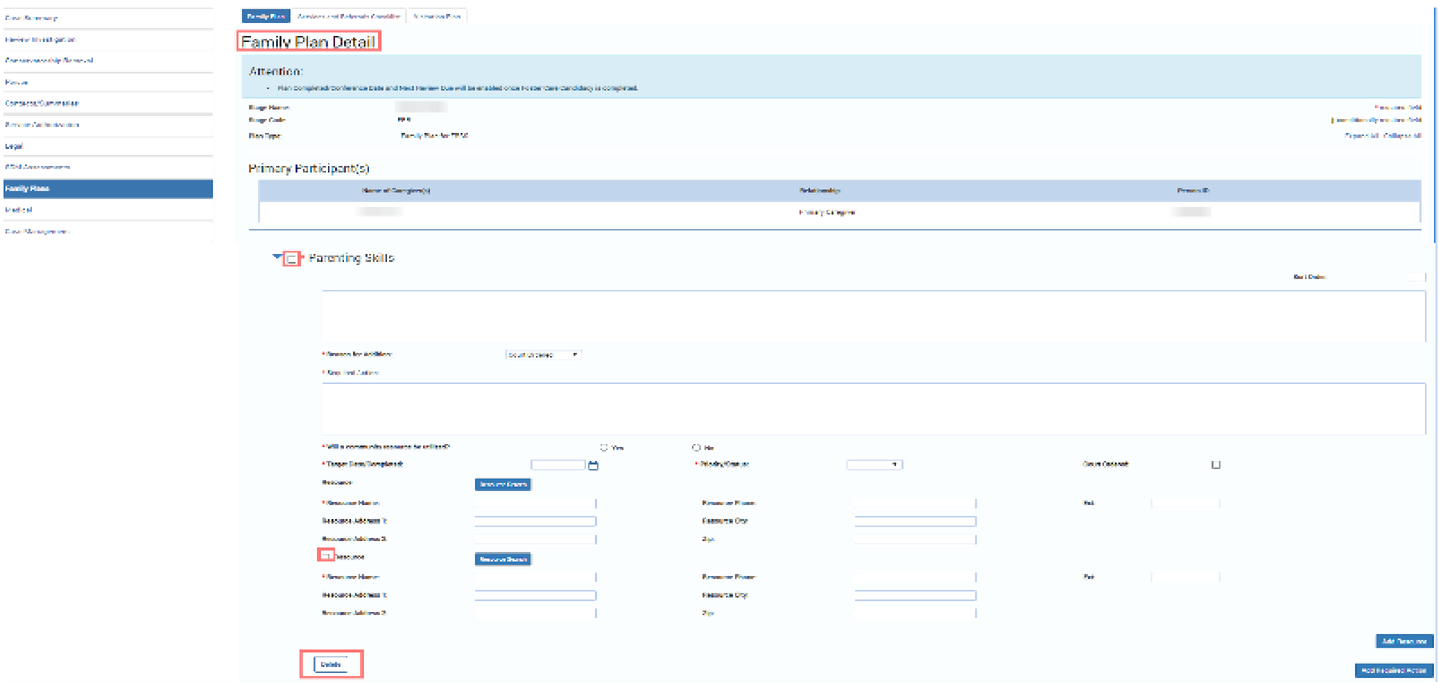


4. Recognize each of your **Needs Domain** has a corresponding **Resource,** which can be manually entered, or prefilled via the **Resource Search** button.
5. Locate the **Resource Search** button. Selecting this button performs a search on **Resources** for a manually added **Needs Domain** and **Required Action**. Information from the **Resource** record, such as name, address, and phone number will prefill, and is user editable. Although you will be redirected to the **Resource Search** page, your information on the **Family Plan** will be retained.
6. When adding an additional resource, locate the **Add Resource** button. This generates another **Resource** section, including its corresponding **Resource Search** button.
7. When adding an additional resource, locate the **Add Required Action** button. Selecting this button opens another text box that will require information on additional **Required Action**.



Deleting a Required Action, Resource, or Needs Domain

1. Locate the **Delete** buttons on the page displaying in the **Needs Domain**, **Resource**, and **Required Action** sections.
2. 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 a **Required Action** is checked, the system will delete the **Required Action** and its associated 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.
    - If the checkbox corresponding to the **Needs Domain** is checked, the system will delete the **Needs Domain** and all its associated fields. You may delete a prefilled or manually added **Needs Domain** for **Caregiver(s) Needs**, but may delete only a manually added **Needs Domain** for **Child(ren) Needs and Actions to Address**.

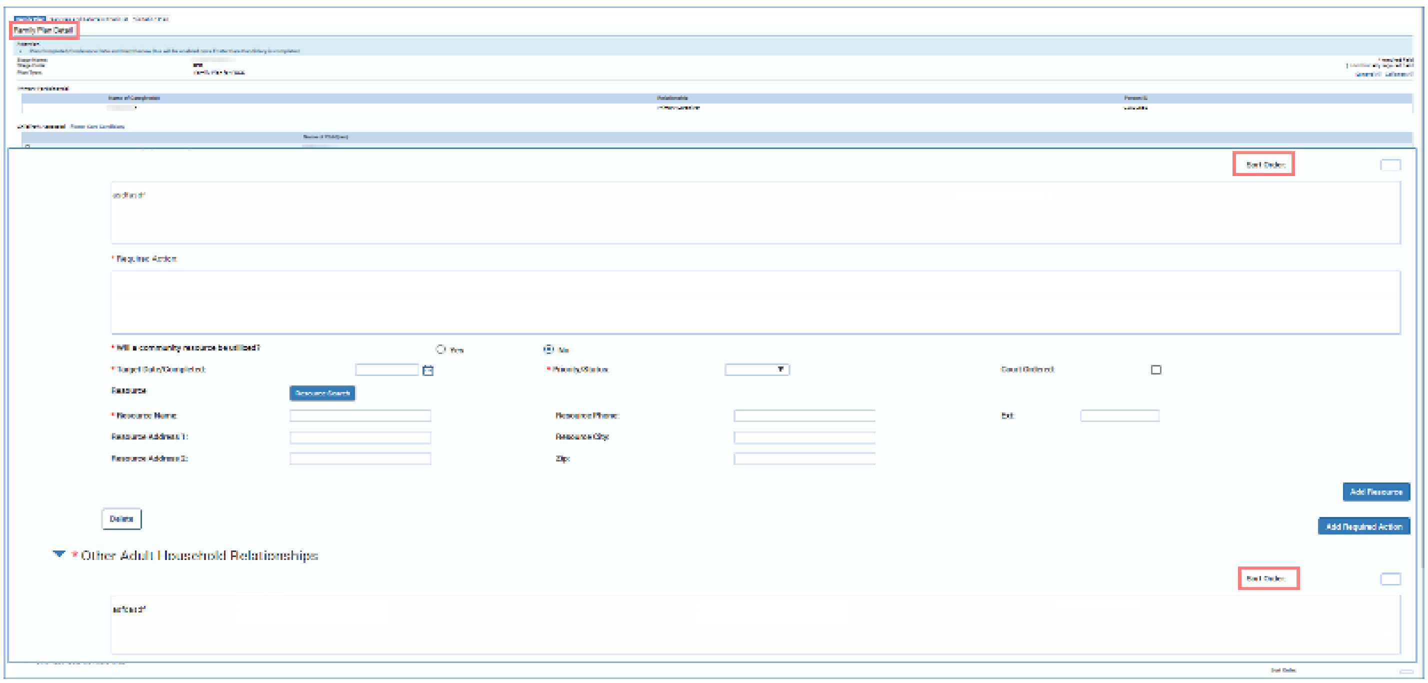


New in the Family Plan – Sort Order

NEW!

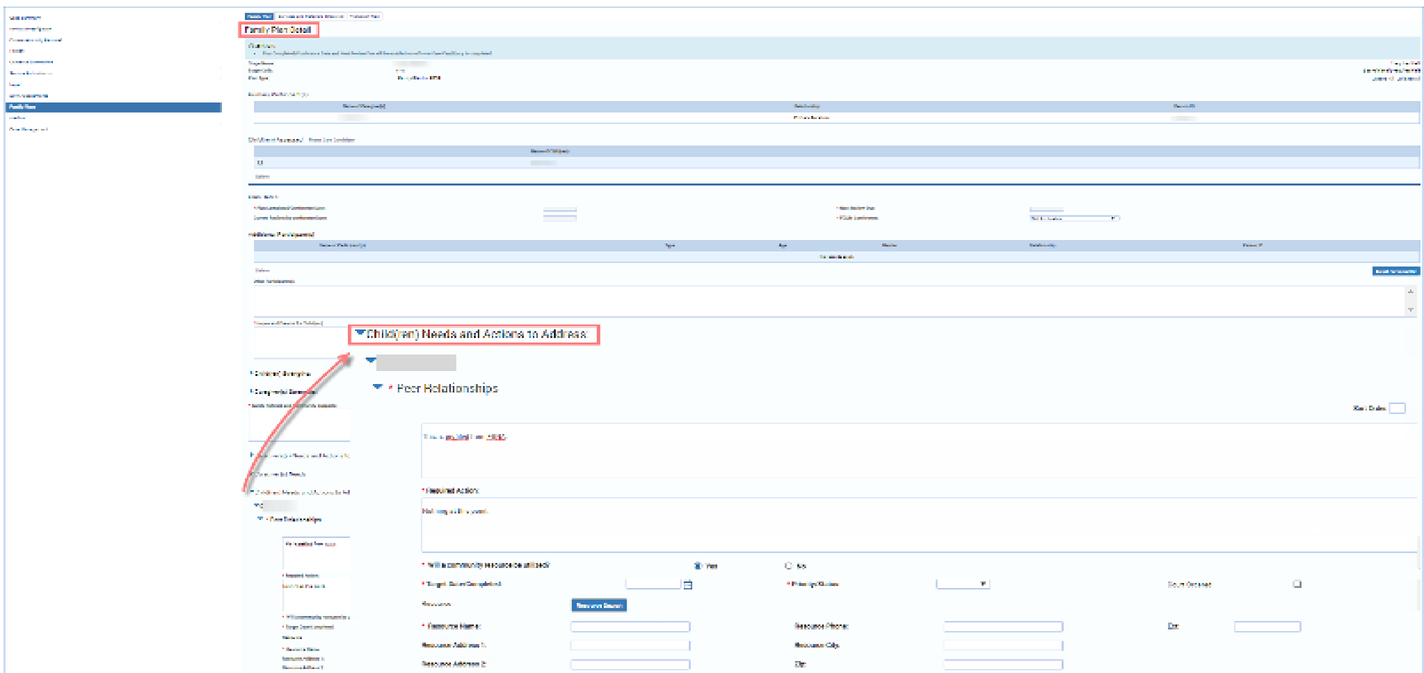
1. Locate the **Sort Order** box for each **Needs Domain**.
2. Assign a number for each **Sort Order** box to specify the order in which each **Needs Domain** will appear on the printed **Family Plan** form.

***Note: Sort Order** is not required and is applied only on the <u>printed</u> **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.*



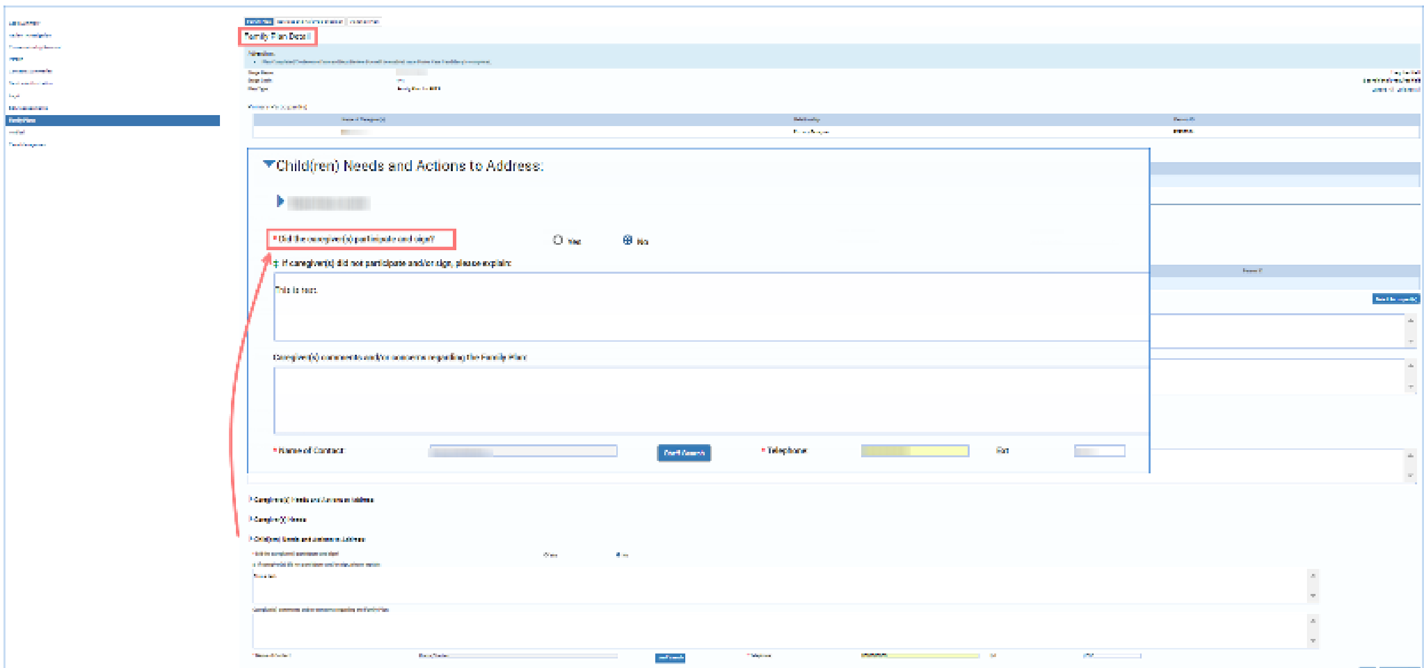
Completing the Section for Child(ren) Needs and Actions to Address

1. Complete the **Child(ren) Needs and Actions to Address** section in much the same way as the **Caregiver(s) Needs** section with the exception that you cannot delete prefilled **Needs Domains.** Only manually added domains, **Required Action**, and **Resource** fields can be deleted.
2. Recognize the section prefills with the name(s) of the child(ren) who have **Children Assessed** checkbox(es) selected in the associated **FSNA**.
3. Recognize the **Needs Domain** for the child(ren) displayed are those that were marked as "Needs Identified" in the **FSNA**.
4. Examine a **Needs Domain** field. Recognize that although text in the **Needs Domain** field is prefilled from the **FSNA**, you may edit the textbox.



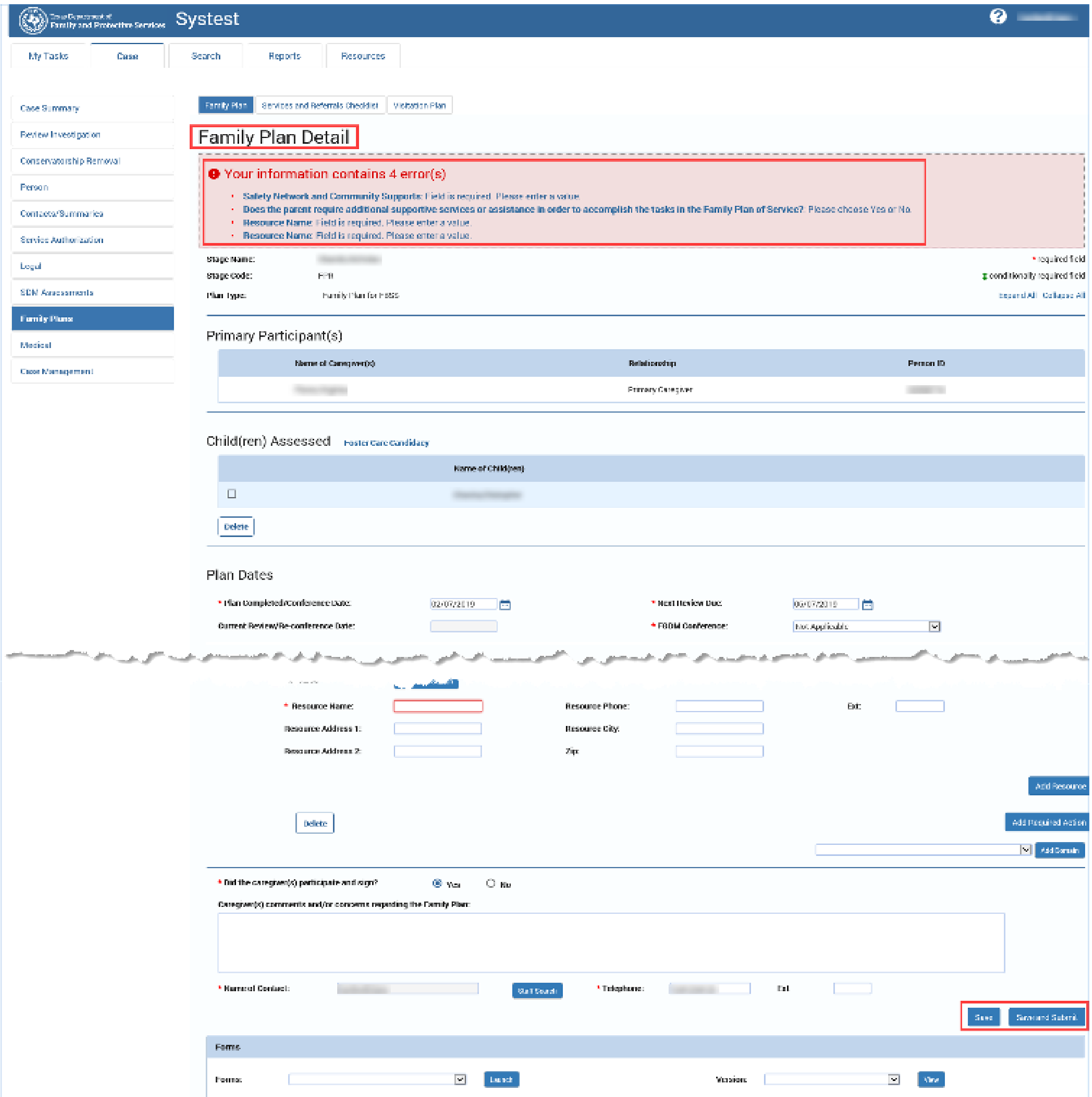
Completing the Family Plan – Caregiver Participation & Signature

1. For the field **Did the caregiver(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 caregiver(s) did not participate and or sign, please explain.** You must enter the information into the textbox.
3. Provide information in the **Caregiver(s) comments and or concerns regarding the Family Plan** textbox, if appropriate.
4. 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.
5. The **Telephone** and **Ext** fields are not prefilled, so you will have to provide that information.



Save and Submit

1. When you want to save your information without submitting the plan for approval, select the **Save** button. The **Family Plan** 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 a message box listing any error(s) that need to be addressed.



System Validation Error Alerts on the Family Plan – Common Errors

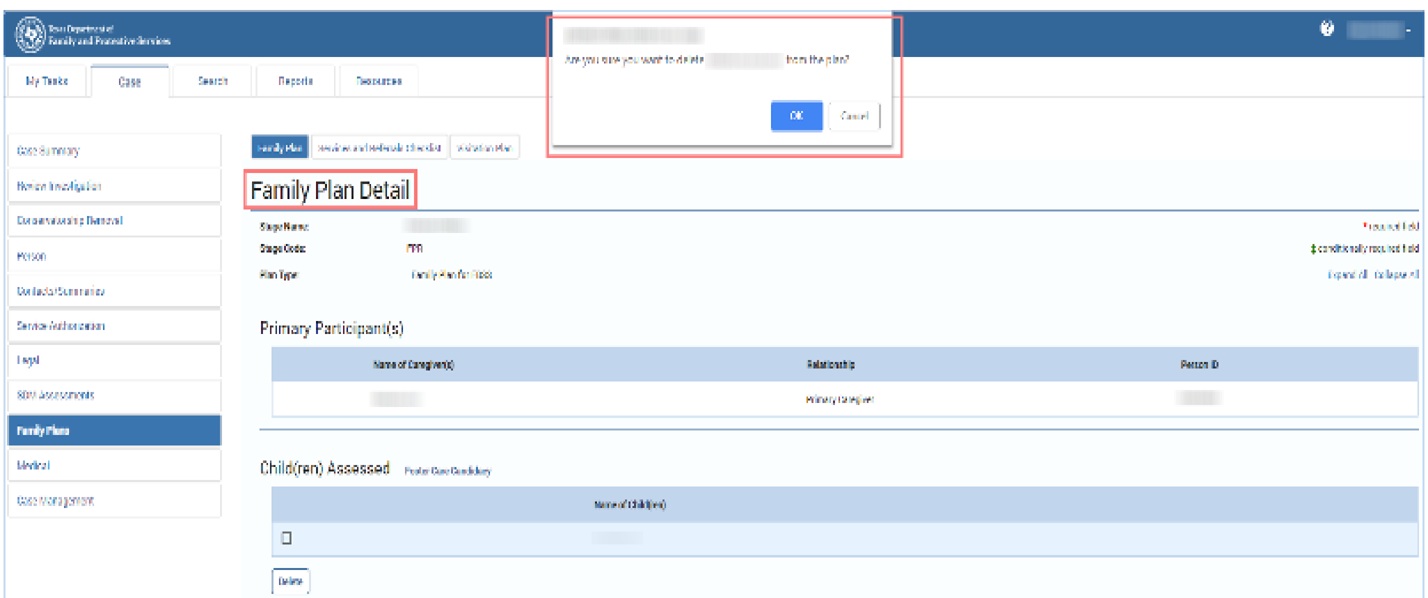
IMPACT 2.0 has system validations to prevent you from losing information you've entered on the page before exiting, and also checks numerous fields before allowing you to save and submit your **Family Plan**. The following validation checks are just a few examples of the system checks IMPACT 2.0 performs.

System Validation Error Alerts on the Family Plan – While You Are Working in the Plan

1. **Sort Order** is checked by the system. If you enter a non-numeric value, you will encounter an error alert.
2. Recognize that when you attempt to delete a **Primary Participant**, IMPACT 2.0 will alert you: "Are you sure you want to delete <Last Name, First Name MI Suffix> from the plan?" Select the **Yes** button to delete or the **No** button to cancel.
3. Recognize the same rules apply to deleting **Child(ren) Assessed**; IMPACT 2.0 will let you know you must select a child, and will also ask if you are sure you want to delete the child from the plan.

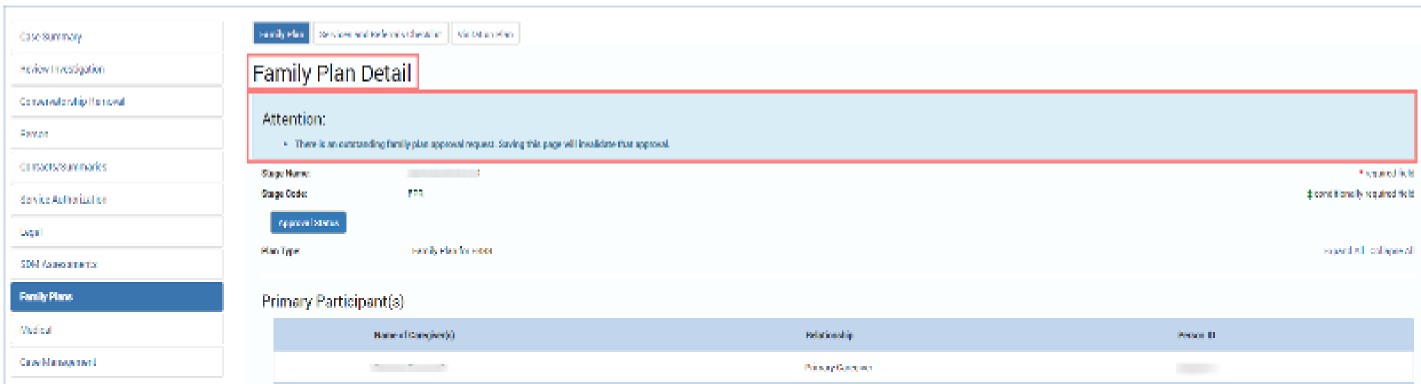
Note: *The system will also alert you if you select the* ***Delete*** *button but don't select a participant, or a child, to delete.*

Similar system checks apply to deleting ***Required Actions*** *and* ***Needs Domains****. You'll be asked if you are sure you want to delete the selected item.*



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

1. 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."
2. If you continue, you will invalidate the submission and you would have to re-submit the plan for approval.



Texas Department of Family and Protective Services

Family Plan of Service FBSS/FPR – Family Plan Forms

Contents

Family Plan Forms Launched from the Family Plan Detail Page

A **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*!

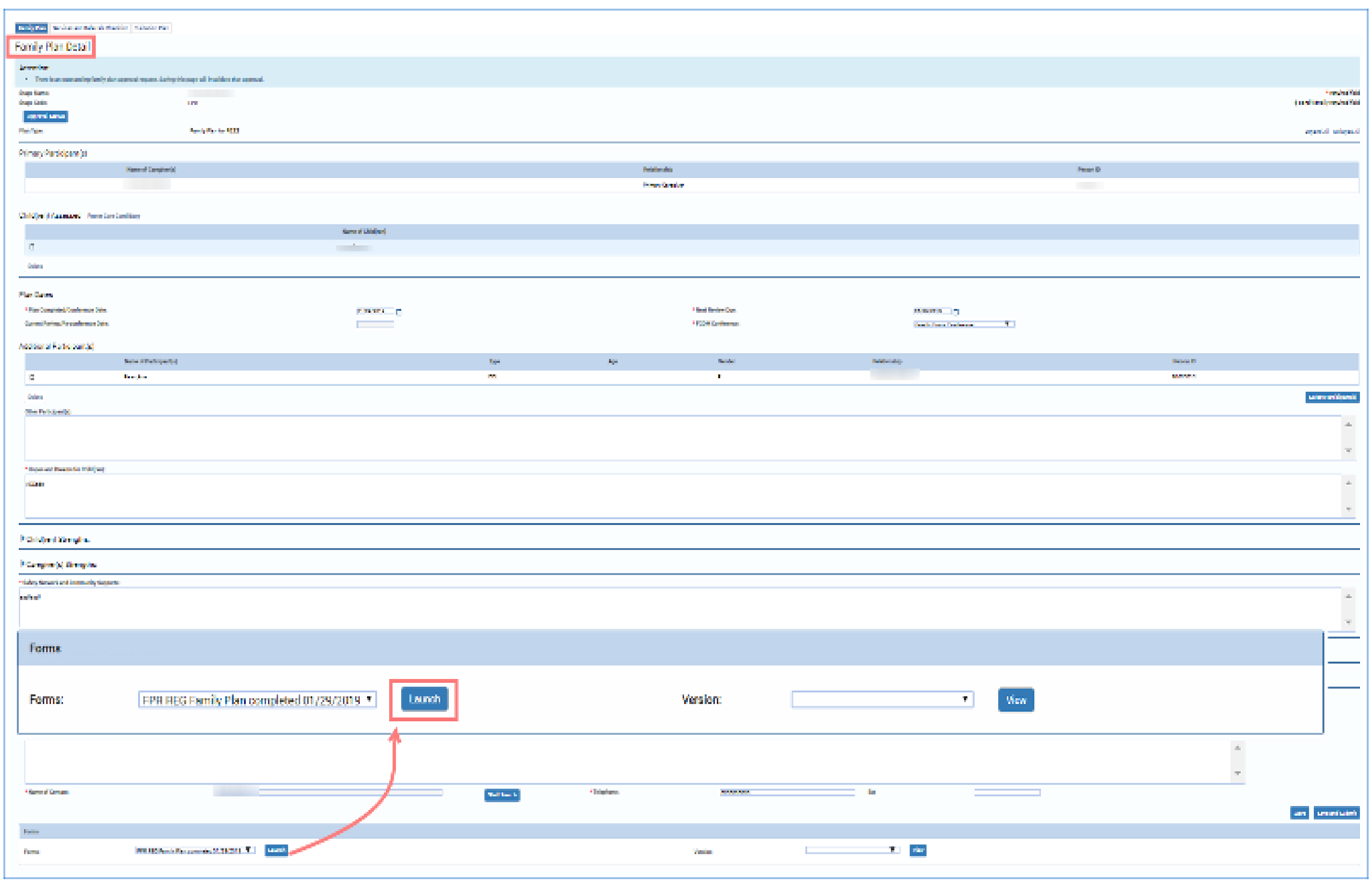
And *(for **FPR** staff only)* if you have had the form signed, but then you need to modify the plan, after saving your updates IMPACT 2.0 creates a new (unsigned) version of the form. This applies to **FPR Family Plans** in any status (PROC, PEND, COMP, APRV).

Each time you modify and save a plan, IMPACT 2.0 creates a new version of the plan, and you can view those previous versions. However, the **Family Plan** form generated for printing will be the most recent version only, downloaded in a PDF document that can be saved or printed.

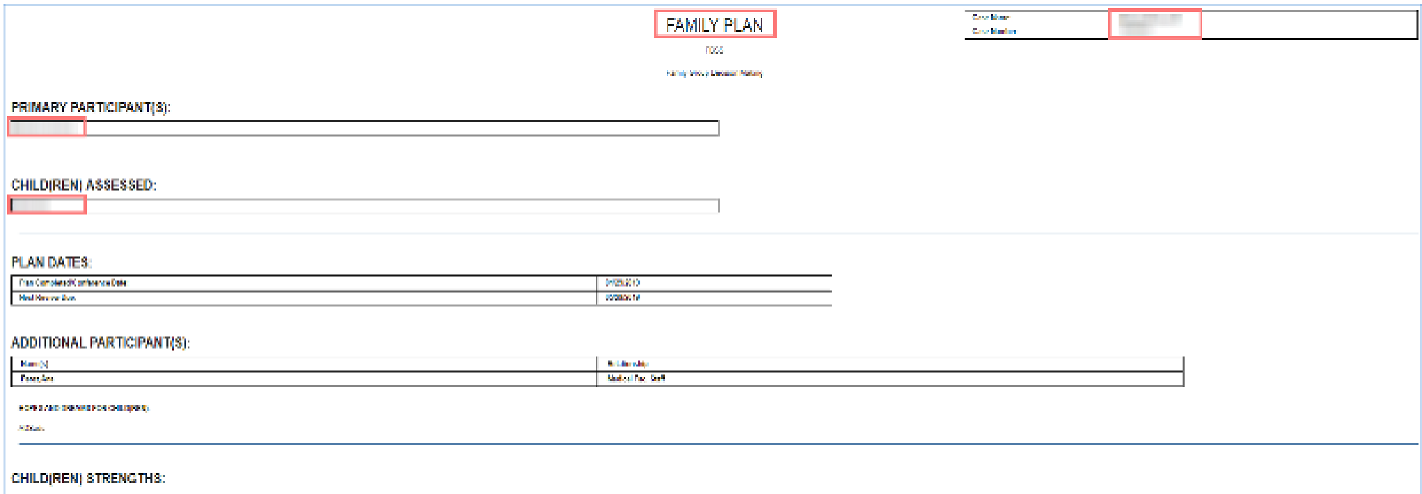
Stages Impacted: FPR

Launching and Viewing the Family Plan form

1. Follow these steps to launch or download a **Family Plan** form for viewing:
2. Navigate to the **Family Plan Detail** page.
3. Locate the **Forms** field and select a plan from the dropdown.
4. Select the **Launch** button to view a plan, which will appear in a form on a new web page.



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

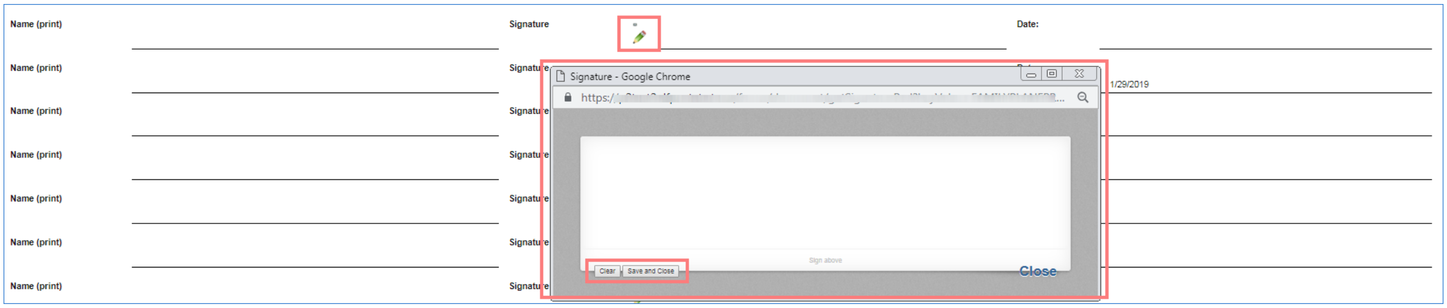


Family Plan form – Electronic Signatures

1. On the **Family Plan** form, select an electronic signature icon (the pencil icon next to each signature line).
2. Examine the **Signature** dialogue box that appears any time the electronic signature icon is selected. Participants electronically sign their name in this box and then select the **Save and Close** button to finalize their signature. The **Clear** button allows them to sign the form again if needed.

Additional notes about electronic signatures:

- You may obtain multiple electronic signatures on the plan, whenever the **Family Plan Detail** is in "PROC," "PEND," "COMP," or "APRV" status.
- You can continue to obtain electronic signatures on the same form only as long as the data on the **Family Plan Detail** is not modified in the system.
- If you do modify your **Family Plan Detail** page, the former plan becomes a read-only version and IMPACT 2.0 will generate the new updated form (without any signatures).
- You cannot delete any electronic signatures that have been confirmed and placed on the form.


Name (print)
Signature
Date:
Signature - Google Chrome
1/29/2019
Sign above
Clear
Save and Close
Close

Texas Department of Family and Protective Services

Family Plan of Service FBSS/FPR – Calendar Notifications

Contents

Family Plan Evaluation Calendar Notifications

IMPACT 2.0 will generate Microsoft Outlook **Calendar Event Notifications** to alert you when **Family Plan Evaluations** are due in the **FPR** stage.

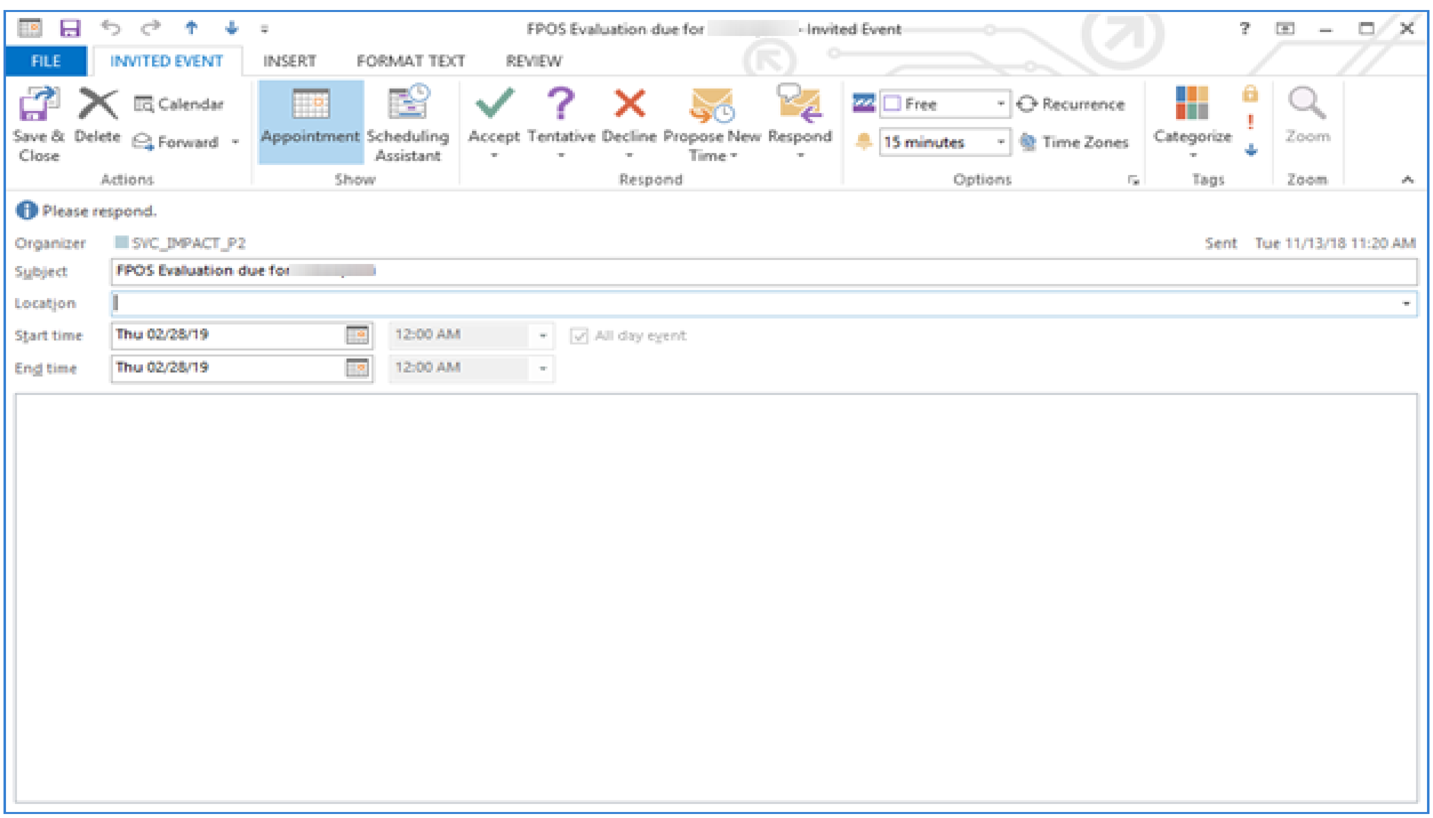
These will be all-day events, but marked to show as "Free," so as not to conflict with other activities on your calendar.

The **Calendar Event Notifications** will be set on both the primary and secondary workers' Outlook calendars.

Stages Impacted: FPR

Viewing Calendar Reminders

1. Open the Outlook Calendar and locate a calendar event for "Evaluation Due."
2. Open and examine the event.
3. Recognize that, although the **Subject** line contains the Last Name, First Initial of the name of the first **Primary Participant** for the **Family Plan Evaluation**, there is no navigation (no hyperlink) from the calendar event to the case in IMPACT 2.0.
4. In addition to a **To-Do IMPACT Task**, **Calendar Event Notifications** are displayed on the date that is 30 days prior to the **Next Review Due** date.
5. Recognize who receives the **Calendar Event Notifications**: All primary and secondary assigned case workers.
6. **Calendar Event Notifications** are not automatically removed from Outlook once you've submitted a **Family Plan Evaluation**. You will need to manually delete them.



Texas Department of Family and Protective Services

Family Plan of Service FBSS/FPR – Family Plan Evaluation

Contents

Creating and Completing a New Family Plan Evaluation

After an initial **Family Plan** has been created, you can create **Family Plan Evaluations**.

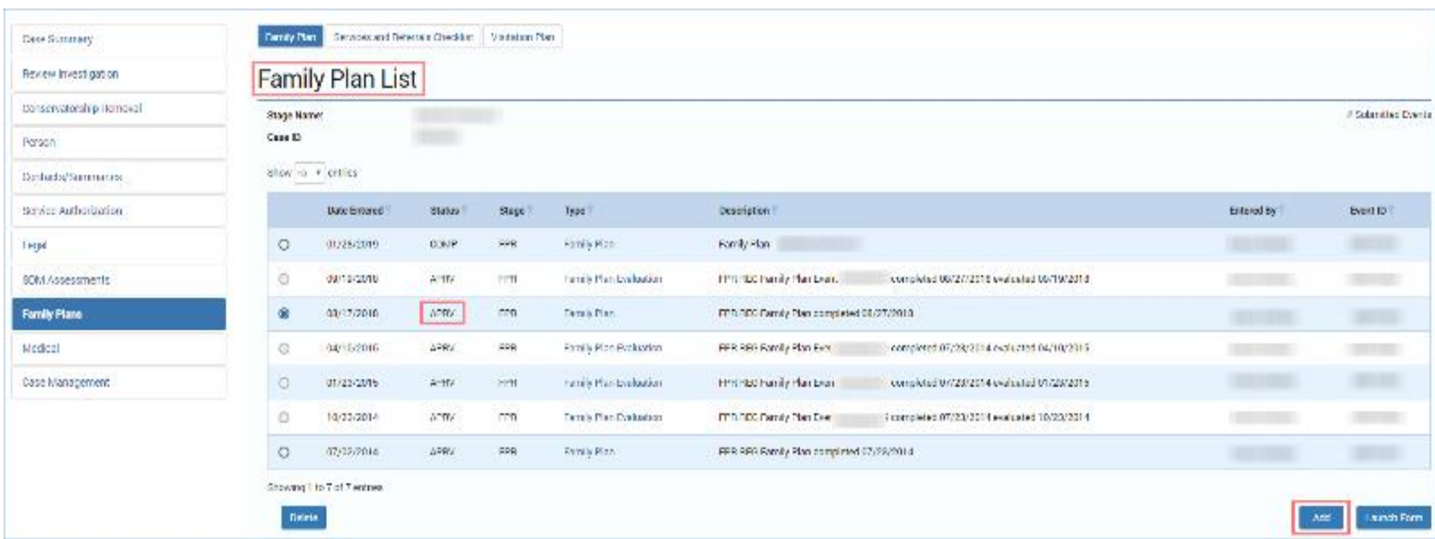
After selecting a **Family Plan** or **Family Plan Evaluation** from the **Family Plan List** page, you will arrive at the **Select FSNA for Evaluation** page. This page displays all the approved/completed and valid reassessed FSNAs within the **FPR** stage. An FSNA will be deemed valid for 30 calendar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

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

Stages Impacted: FPR

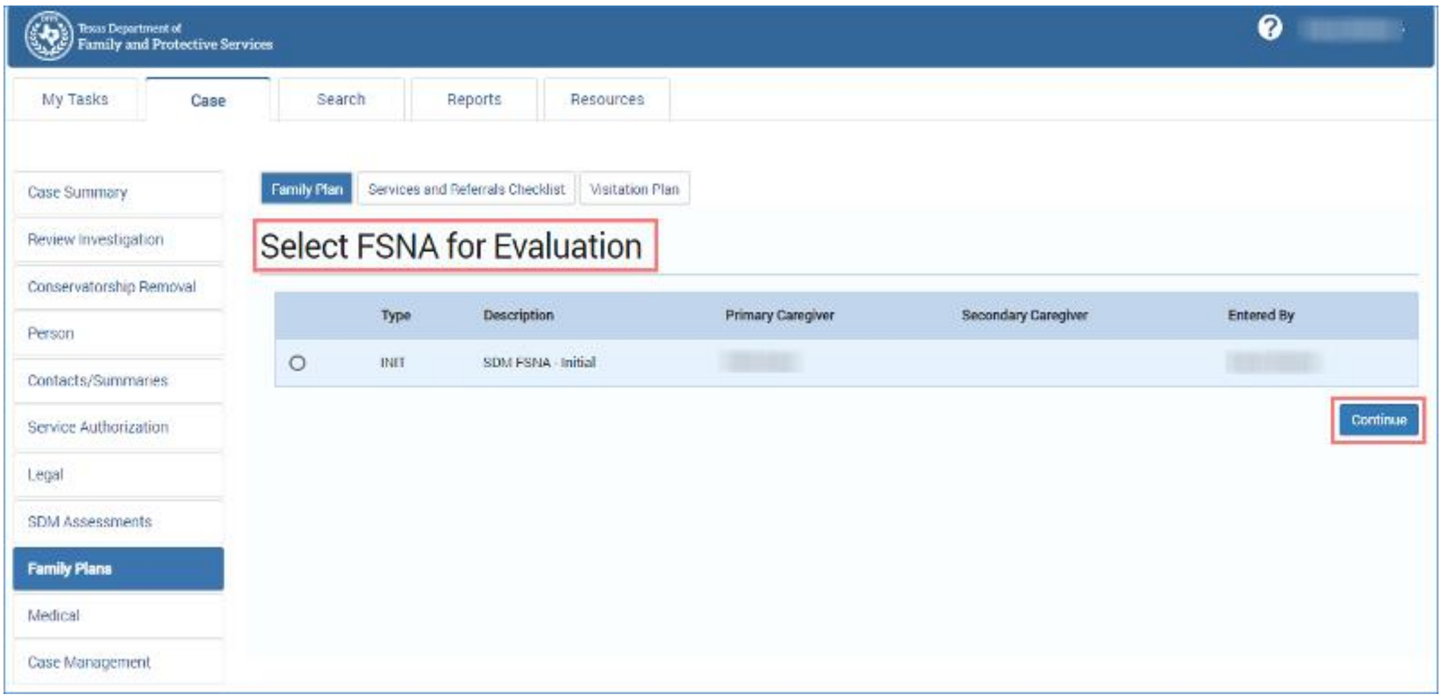
Creating a New Family Plan Evaluation

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



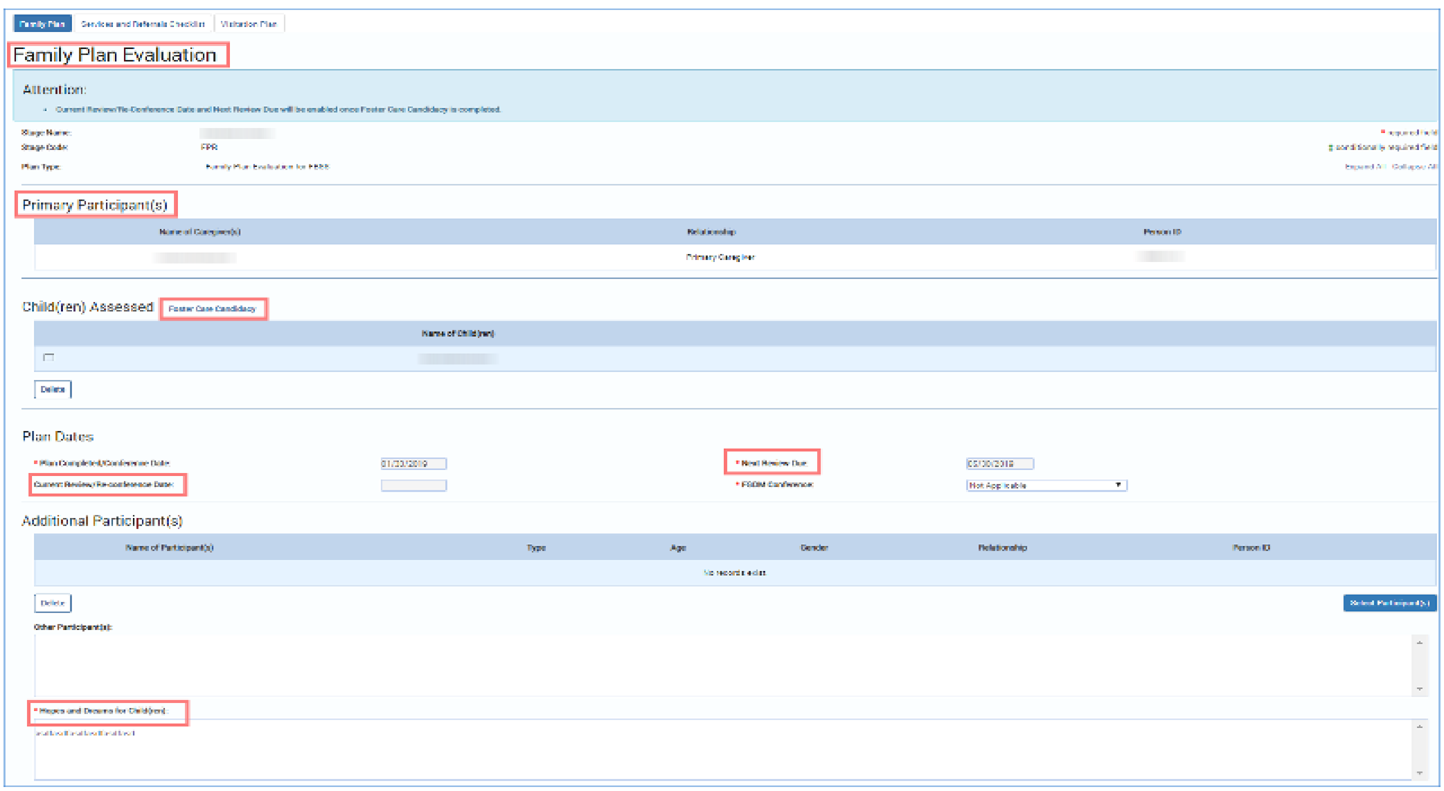
Creating a New Family Plan Evaluation – Select FSNA for Evaluation Page

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/completed and valid **FSNAs** available in the **FPR** stage.
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**.

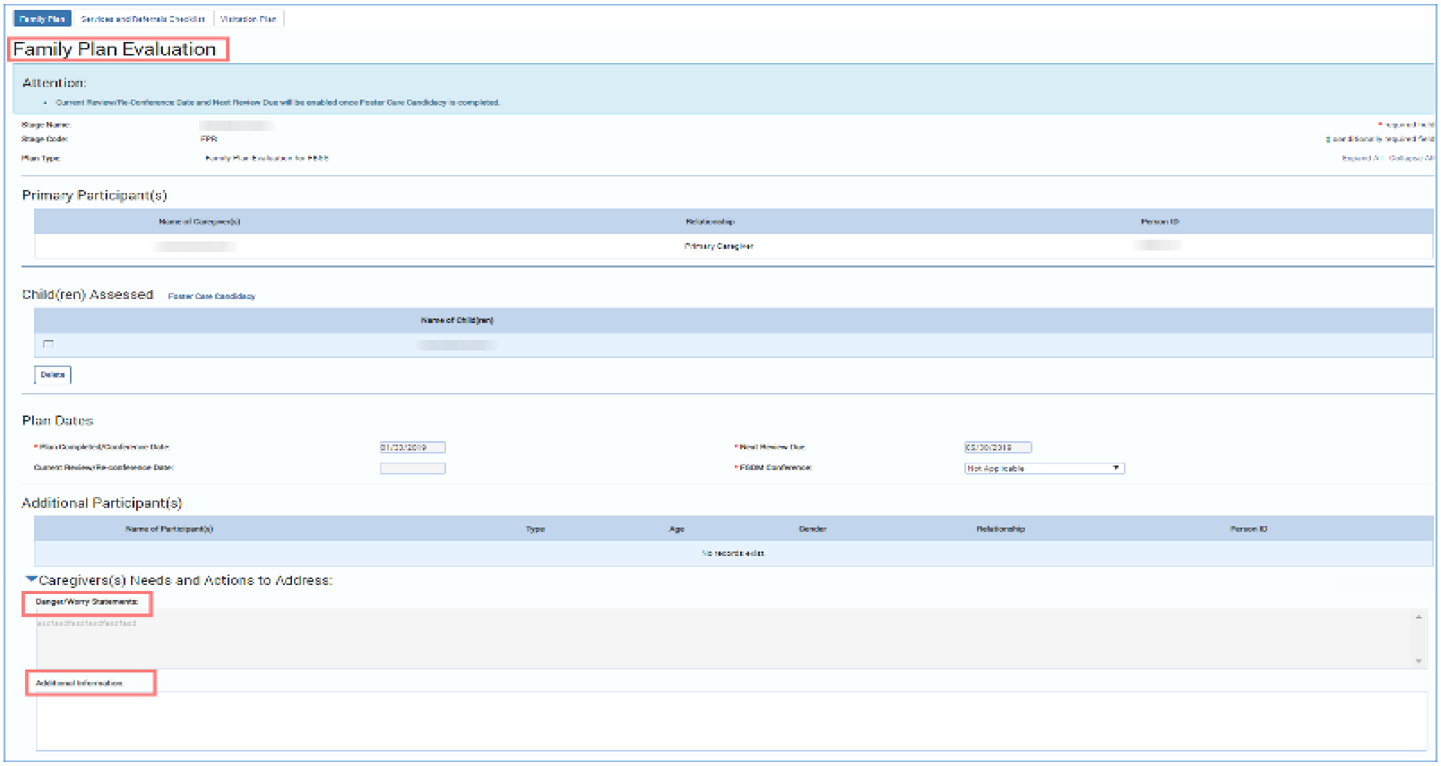


Completing the Family Plan Evaluation

1. Your **Family Plan Evaluation** will contain information prefilled from the selected **FSNA**, as well as the prior **Family Plan** or **Family Plan Evaluation**. Some of the prefilled fields are editable.
2. Once the participants have been prefilled from a valid **FSNA**, you can delete only one of the **Primary Participants** from the **Family Plan Evaluation**.
3. Once the Child(ren) Assessed have prefilled from the **FSNA**, you can delete children from the **Child(ren) Assessed** section. However, the **Family Plan Evaluation** must have one child.
4. Locate the **Current Review/Reconference Date** field. This required field only appears when your **Family Plan Evaluation** is in "PROC" status, and is enabled as soon as the **Foster Care Candidacy** page is completed.
5. Locate the **Next Review Due** field. This required field only appears when your evaluation is in "PROC" status, and is enabled as soon as the **Foster Care Candidacy** page is completed. At that time, it is prefilled with a system-calculated date that is 180 days from this current **Family Plan Evaluation**. However, the field is modifiable to an earlier date.
6. Locate the field for **Hopes and Dreams for Child(ren)**. Although prefilled from the associated **Family Plan** or **Family Plan Evaluation**, this field is also modifiable.

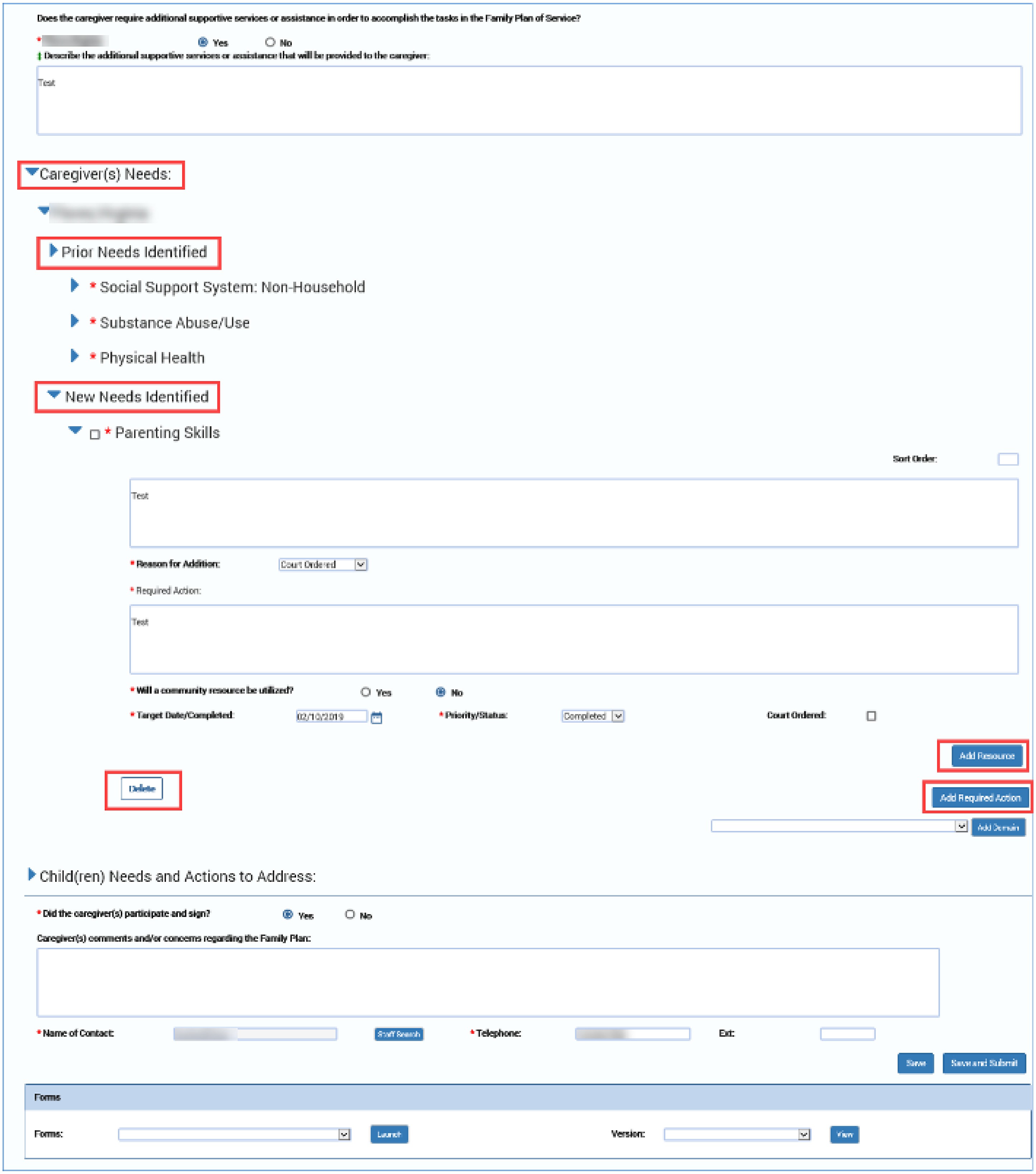


7. Examine the prefilled fields of the **Family Plan Evaluation** to identify which are modifiable and which are not. Many times, for those fields that are not editable, there are comments boxes in which to enter additional information. (For example, the field for **Danger/Worry Statements** is not modifiable, but provides a comments box for **Additional Information**.)



8. Recognize those fields which display because a **Needs Domain** added on the prior plan was also identified on the associated re-assessed **FSNA**.

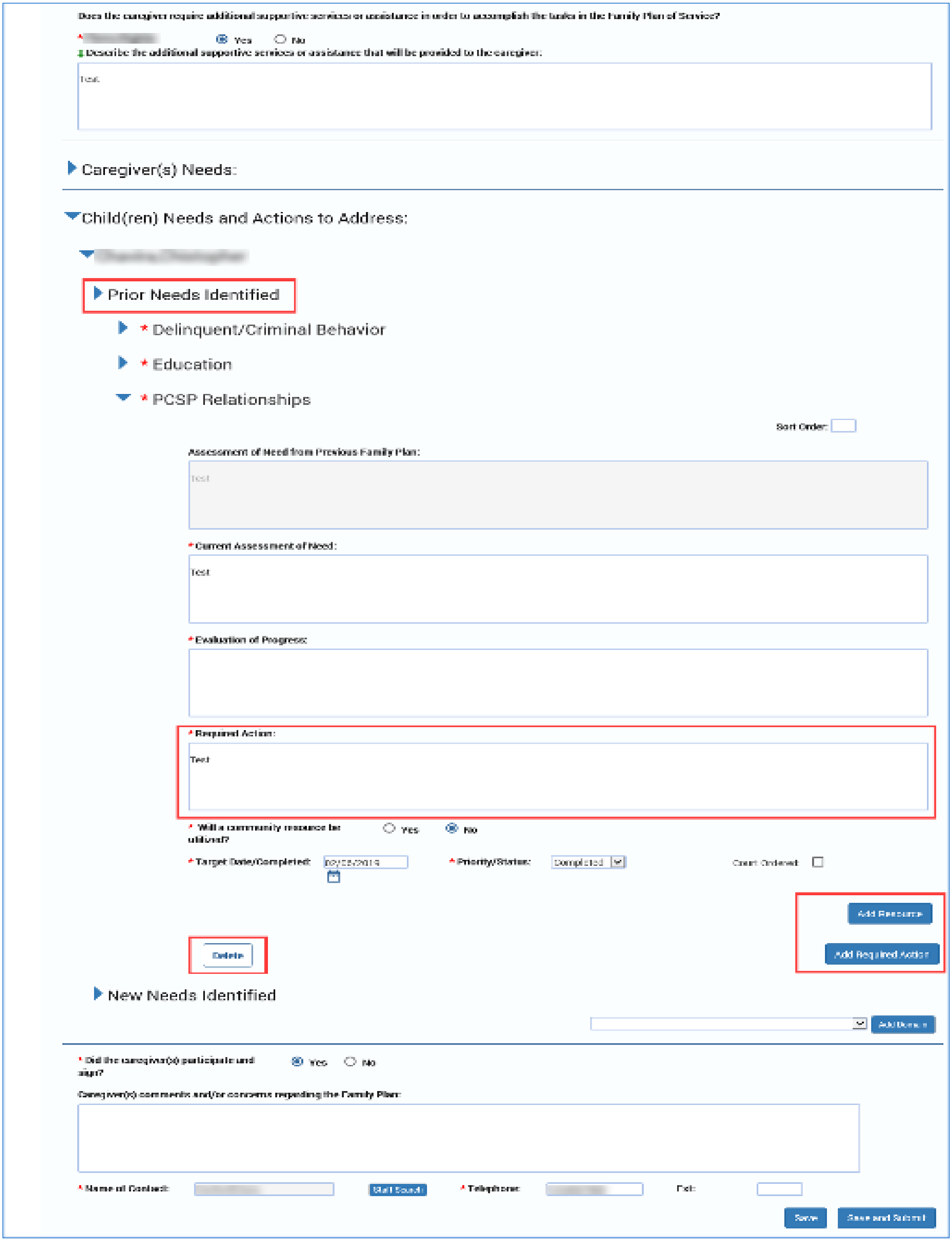
   - A **Needs Domain** identified on the associated **Family Plan** or **Family Plan Evaluation** and the selected **FSNA** for evaluation will prefill in the **Prior Needs Identified** section of the **Caregiver(s) Needs** section.
   - A **Needs Domain** identified on the associated **Family Plan** or **Family Plan Evaluation** page, and also identified on the **FSNA**, will be labeled as "Need Confirmed on FSNA" on the **Family Plan Evaluation** page. It will display in the **Prior Needs Identified** sub-section of the **Caregiver(s) Need** and **Child(ren) Needs and Actions to Address** section.
   - A **Needs Domain** identified on the selected **FSNA**, but not a part of the associated **Family Plan** or **Family Plan Evaluation** page, as well as **Needs Domain** that are manually added, prefill into the **New Needs Identified** subsection of the **Caregiver(s) Need** section.
   - A **Needs Domain** listed for child(ren) on the associated **Family Plan** or **Family Plan Evaluation** prefill in the **Prior Needs Identified** sub section in the **Child(ren) Needs and Actions to Address** section.
   - A **Needs Domain** listed for child(ren) manually added on the **Family Plan Evaluation** is listed in the **New Needs Identified** sub section in the **Child(ren) Needs and Actions to Address** section.


Does the caregiver require additional supportive services or assistance in order to accomplish the tasks in the Family Plan of Service?
Yes
No
Describe the additional supportive services or assistance that will be provided to the caregiver:
Test
Caregiver(s) Needs:
Prior Needs Identified
* Social Support System: Non-Household
* Substance Abuse/Use
* Physical Health
New Needs Identified
* Parenting Skills
Sort Order:
Test
* Reason for Addition:
Court Ordered
* Required Action:
Test
* Will a community resource be utilized?
Yes
No
* Target Date/Completed:
02/10/2019
* Priority/Status:
Completed
Court Ordered:
Add Resource
Delete
Add Required Action
Add Domain
Child(ren) Needs and Actions to Address:
* Did the caregiver(s) participate and sign?
Yes
No
Caregiver(s) comments and/or concerns regarding the Family Plan:
* Name of Contact:
Staff Search
* Telephone:
Ext:
Save
Save and Submit
Forms
Forms:
Launch
Version:
View

9. Locate the **Delete** buttons for a **Resource**, **Required Action**, or **Needs Domain**.

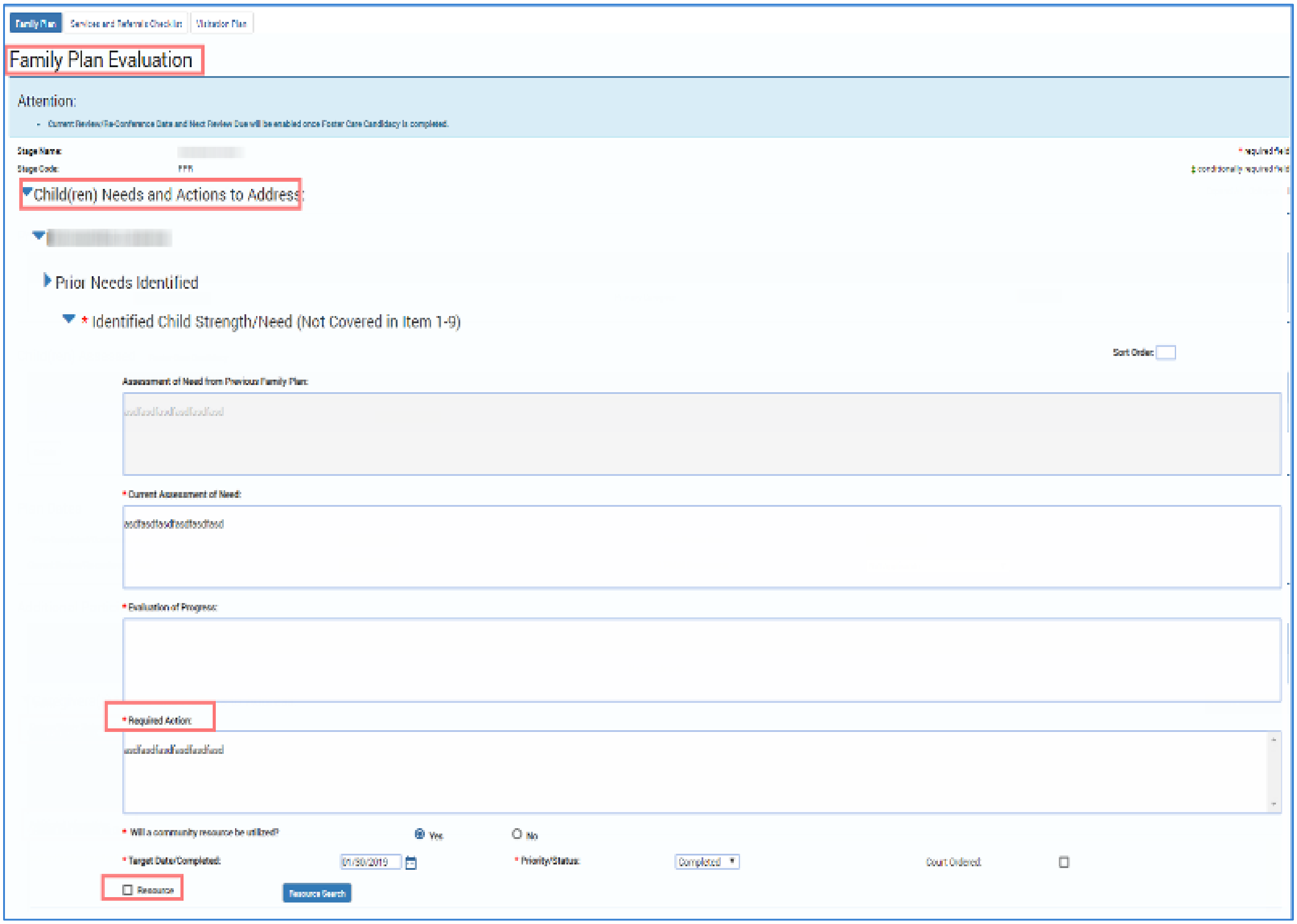
10. For the **Caregiver(s) Needs** section the following rules apply:

- A **Needs Domain** prefilled from the **FSNA** <u>or</u> manually added can be deleted in the **New Needs Identified** sub section on the **Family Plan Evaluation**.
- Every **Needs Domain** must have at least one **Required Action** associated with it and **Required Action** fields prefilled from the associated **Family Plan** or **Family Plan Evaluation** cannot be deleted from the **Family Plan Evaluation** page. However, the priority/status can be changed.
- A **Required Action** can only be deleted if it has been manually added and there is at least one remaining **Required Action** associated with a **Needs Domain**.
- Only manually added **Resources** can be deleted.


Does the caregiver require additional supportive services or assistance in order to accomplish the tasks in the Family Plan of Service?
Yes
No
Describe the additional supportive services or assistance that will be provided to the caregiver:
Test
Caregiver(s) Needs:
Child(ren) Needs and Actions to Address:
Prior Needs Identified
* Delinquent/Criminal Behavior
* Education
* PCSP Relationships
Sort Order:
Assessment of Need from Previous Family Plan:
Test
* Current Assessment of Need:
Test
* Evaluation of Progress:
* Required Action:
Test
* Will a community resource be utilized?
Yes
No
* Target Date/Completed:
* Priority/Status:
Completed
Court Ordered:
Add Resource
Add Required Action
Delete
New Needs Identified
* Did the caregiver(s) participate and sign?
Yes
No
Caregiver(s) comments and/or concerns regarding the Family Plan:
* Name of Contact:
Staff Search
* Telephone:
Ext:
Save
Save and Submit

11. For the **Child(ren) Needs and Actions to Address** section, the following rules apply:

- A **Needs Domain** that is prefilled from the associated **Family Plan** or the **Family Plan Evaluation** page cannot be deleted.
- A **Needs Domain** that is manually added can be deleted on the **Family Plan Evaluation**.
- Every **Needs Domain** must have at least one **Required Action**.
- A **Required Action** can only be deleted if it has been manually added and there is at least one remaining **Required Action** associated with a **Needs Domain**.
- Only manually added **Resources** can be deleted.

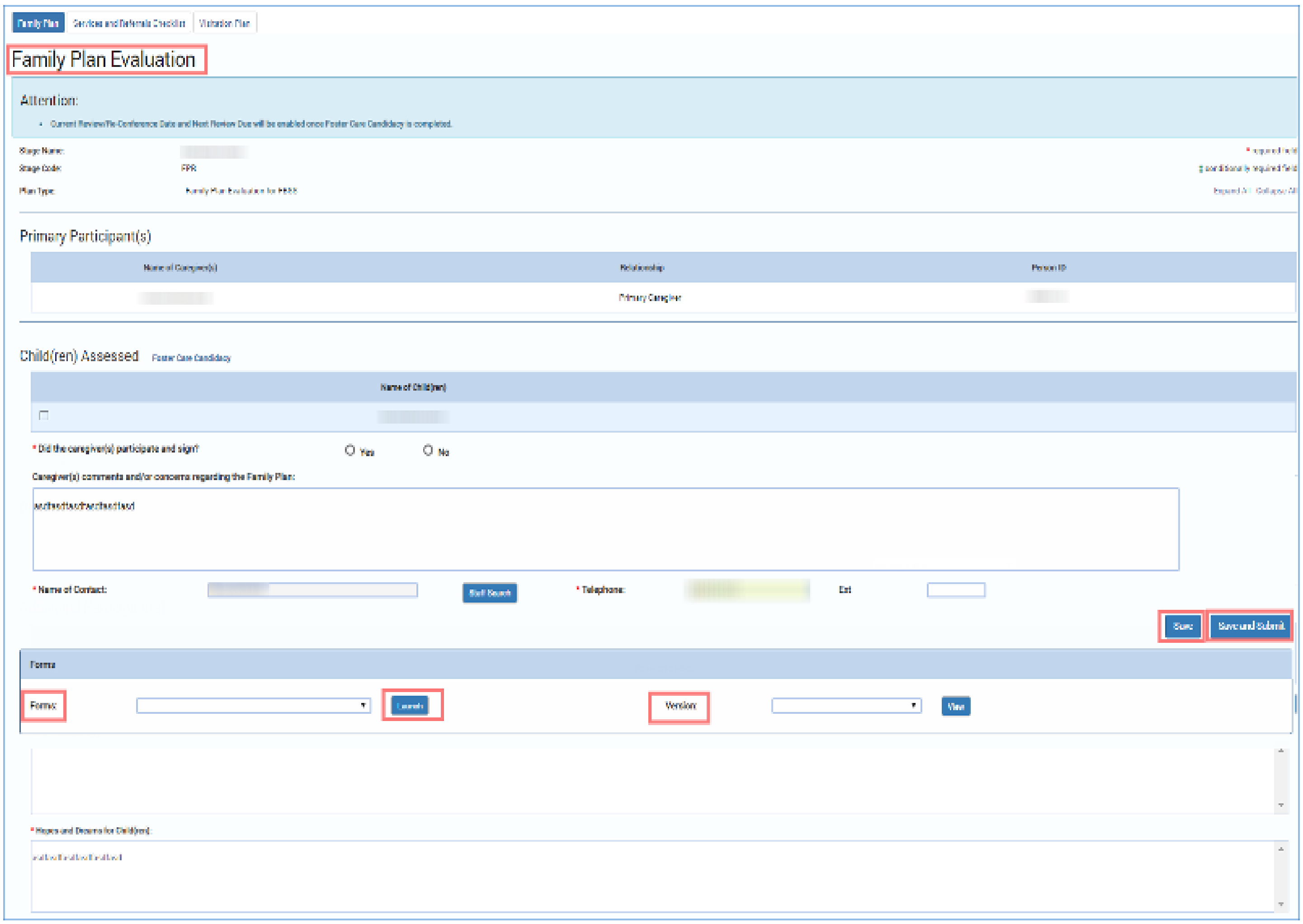


12. Select the **Add Required Action** button and the **Add Resource** button for a **Needs Domain** marked as **Needs Identified** in the **FSNA**, but not marked in the prior plan.

13. Locate the **Save** and **Save and Submit** buttons. Recognize that IMPACT 2.0 will perform numerous validations and will generate error messages if the system detects anything preventing a successful "Save and Submit."

14. Locate the **Forms** dropdown and **Launch** button to launch a **Family Plan Evaluation** form, which, like the initial **Family Plan** form, also features electronic signature capabilities. The same rules relating to electronic signatures apply to both the **Family Plan** and the **Family Plan Evaluation**.

15. Locate the **Version** dropdown to view different versions of the **Family Plan Evaluation** form.



Family Plan Evaluation Task on Staff To-Do and Case To-Do Lists

In IMPACT 2.0, the task for **Family Plan Evaluations** has changed to being due every 180 days, versus the Legacy IMPACT task for **Family Plan Evaluations** being due every 90 days.