

## Job Aid

## for

# **Document Child Contact**

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### **Contact Detail – Adoption Inquiries**

### Overview

The Substitute Care (**SUB**) stage now includes a new **Contact Type** option called "Adoption Inquiries" on the **Contact Detail** page.

In the **Purpose** field, when you select "Family Inquiries" as the **Purpose** and select the **Narrative** button, the **Prospective Families' Adoptive Information** form is launched. When you select "Recruitment Activities" and select the **Narrative** button, a blank narrative form is launched.

A single contact can be saved, closed, and re-opened for editing the form to document additional Adoption Inquiries, until you use all the rows on the form. You can create additional Adoption Inquiry Contacts, as needed.

#### Stages Impacted: SUB

#### **Contact Detail Page – How to Get There**



1. On the **Assigned Workload** page in the **My Tasks** tab, select a hyperlink to a case in **SUB** stage under **Stage Name**.

Texas Departme Family and I	ent of Protective Services													?	•
My Tasks	Case	Search	Reports	Resource	es										
Workload		Workload													
Staff To-Do List		Assigne	d Worklo	ad											
		User Name : User ID :	=	7										A Wo ● Eligible Fo	r new stage rker Safety r Soreening Soreened
		Show 10 🗸 en	tries												₹
		SS	! WS Hir	P/S	M-Ref Stage Name	County	Stage	Туре	Opened	Assigned	Region	Unit	Stage ID	Case ID	PGM 🕆
				Ρ		-	-	I&R	04/11/2018	04/11/2018	03	E0			PRS
				Р				REG	08/21/2018	09/06/2018	03	E0			CPS
			▲	Р	$\bigcirc$	<	SUB	REG	02/13/2018	02/27/2018	03	E0			CPS
				Р				REG	03/05/2018	03/27/2018	03	E0		-	CPS

2. You will arrive at the **Case Summary** page.

Case Summary	Case Summary Case Summary	Tool Case To-Do List	Event List	Event Search	Case History	Principal Case History	Family Tree	PCSP			
Person	Case Summary										
Contacts/Summaries	Case Name:										* required field
Service Authorization										‡ cond	litionally required field
Legal	Attention:	Garcia Steven. SUB stage									
Child Plans	,										
Placement	Case Information					Region:	0	2			
History	Status					Start Date of Cas		15/12/2012			
Medical										Exp	and All Collapse All
Foster Care Eligibility	Show 10 v entries										
PCA	Mrg M-Ref	Stage Name	Stg Type	e Opened	Time	Closed	Primary	Reg	Stage ID	Ov Dsp	Phone
ICPC	0		MDN	IG2 04/08/201	8 08:05 PM	06/15/2018		07		UTD	
Case Management	0	100.00	MDN	IG2 04/08/201	8 10:29 AM	04/08/2018		99			
	0		REG	11/10/201	8			07			

- 3. Select **Contacts/Summaries** from the secondary menu.
- 4. You will arrive at the **Contact Detail** page.

My Tasks	Case	Search	Reports	Resources		
Case Summary	Contac	t Search/List Co	ontact Detail			
Person	Con	tact Deta	ail			
Contacts/Summarie	s					
Service Authorization	1					required field conditionally required field
Legal	Con	tact/Summ	ary Type			
Child Plans	*1	ype:	Contact	Y		
Placement	Con	tact Inform	ation			
History		ntacted By:			Select Staff	
Medical	* (	Contact Date:			‡ Time:	0
Foster Care Eligibility	, 🗆	‡ Attempted				
PCA	‡1	Purpose:		Y	‡ Method:	$\checkmark$
ICPC			Sibling Visit Incl	ıded		
Case Management	‡1	location:	×		‡ Others Contacted:	$\checkmark$
	Prin	cipals/Colla	aterals Contac	ted		
		Name		Туре	Role	Relation/Interest
				Principal	No Role	Other
	1			Principal	No Role	Cousin

### Launching the New Prospective Adoptive Families' Information Form

1. On the **Contact Detail** page, select "Adoption Inquiries" from the **Type** dropdown.



**Note:** When you select "Adoption Inquiries" from the **Type** dropdown, the **Time** field and label are removed.

2. Enter today's date in the **Start Date** field.



Note: The Start Date field has been relabeled from the original Contact Date.

- 3. Select "Family Inquiries" from the **Purpose** dropdown.
- 4. Select the **Save** button.



**Note:** You must save the page before you launch the Narrative form. If you skip this step, you will receive an error message.

5. Select the **Narrative** button.

My Tasks	Case Search Reports Reso	urces
Case Summary	Contact Search/List Contact Detail	
Person	Contact Detail	
Contacts/Summaries		
Service		* required field
Authorization	- · · //	
Legal	Contact/Summary Type  * Type: Adoption Inquiries	
Child Plans	* Type. Adoption inquiries	
Placement	Contact Information	
History	Contacted By:     Start Date: 01/04/2019	
Medical	Estimated Time with Hours: : Mins:	)
Foster Care Eligibility	Client(s):	
PCA	<b>‡ Purpose:</b> Family Inquiries	
ICPC	Delete	Save
Case Management	Narrative	

### 6. Once you select the **Narrative** button, the **Prospective Adoptive Families' Information** form is launched in a new tab.

B I <u>U</u>	E É	∃ ≣ % ()			
Document all fa	milies who inqu	uire about a child throu	ughout the time of adopti	ion recruitment. The intent of this template is to capture a list of all families	who inquire about a child
throughout the t	ime of recruitm	ent. When all rows ha	ve been filled, please cr	eate a new contact type to continue the family inquiry list.	
Desumant the n	ama of a ach fa	naily who incuring a h	out the shild the data th	a inquiry was reactived which resputtment teal was used whether the family	u in change for the coloction
			-	e inquiry was received, which recruitment tool was used, whether the family	
				A or FAD was notified. Recruitment tool options can include: TARE, AdoptU	JSKIDS, EMAII Broadcast, H
Gallery, Match F	Party, Wendy's	Wonderful Kids, Telev	vision Segment, Social N	Vedia, and Other (indicate).	
		PRO	SPECTIVE AD	DOPTIVE FAMILIES' INFORMATION	
Date			Selection		Date
Inquiry	Family	Recruitment	Selection Staffing	Reason whether or not family is chosen for	CPA/FAD
			Selection		
Inquiry	Family	Recruitment	Selection Staffing	Reason whether or not family is chosen for	CPA/FAD
Inquiry	Family	Recruitment	Selection Staffing	Reason whether or not family is chosen for	CPA/FAD
Inquiry	Family	Recruitment	Selection Staffing	Reason whether or not family is chosen for	CPA/FAD
Inquiry	Family	Recruitment	Selection Staffing	Reason whether or not family is chosen for	CPA/FAD
Inquiry	Family	Recruitment	Selection Staffing	Reason whether or not family is chosen for	CPA/FAD
Inquiry	Family	Recruitment	Selection Staffing	Reason whether or not family is chosen for	CPA/FAD
Inquiry	Family	Recruitment	Selection Staffing	Reason whether or not family is chosen for	CPA/FAD

### **Prospective Adoptive Families' Information Form**

The new **Prospective Adoptive Families' Information** form allows you to capture a list of families who inquire about a child during the time of adoption recruitment. The form has the standard IMPACT 2.0 toolbar and a list with the following columns where you enter the appropriate information regarding the family's inquiry:

1. Date Inquiry Received: Enter the date in MM/DD/YYYY format.

- 2. Family Name: Enter the family name.
- 3. **Recruitment Tool:** Enter the recruitment tool from which the inquiry was received. Recruitment tool options can include: TARE, AdoptUSKids, Email Broadcast, Heart Gallery, Match Party, Wendy's Wonderful Kids, Television Segment, Social Media, and Other.
- 4. **Selection Staffing (Yes or No):** Enter whether the family is selected for selection staffing.
- 5. **Reason whether or not family is chosen for selection staffing:** List the reason for the selection staffing decision.
- 6. **Date CPA/FAD notified:** Enter the date in MM/DD/YYYY format.
- 7. When you have finished entering information on the form, select the **Save** icon on the form toolbar. You can exit the tab and the information will be retained on the form.

				画 り C <b>上</b>	
Document all	families who i	inquire about a child	I throughout the time	of adoption recruitment. The intent of this template is to capture a	list of all families wh
			-	ws have been filled, please create a new contact type to continue t	
inquire about	a cillia tilloug	nout the time of rec		ws have been med, please create a new contact type to continue t	une raminy inquiry its
Document the	name of eac	h family who inquirie	es about the child, the	e date the inquiry was received, which recruitment tool was used, v	whether the family is
chosen for the	e selection sta	ffing, the reason the	e familv was or was n	not selected, and the date the CPA or FAD was notified. Recruitme	nt tool options can
		27	2	not selected, and the date the CPA or FAD was notified. Recruitme	
		27	2	not selected, and the date the CPA or FAD was notified. Recruitme th Party, Wendy's Wonderful Kids, Television Segment, Social Med	
		ds, Email Broadcast	, Heart Gallery, Matc	h Party, Wendy's Wonderful Kids, Television Segment, Social Med	
		ds, Email Broadcast	, Heart Gallery, Matc		
		ds, Email Broadcast	, Heart Gallery, Matc	h Party, Wendy's Wonderful Kids, Television Segment, Social Med	
include: TARE		ds, Email Broadcast	t, Heart Gallery, Matcher	h Party, Wendy's Wonderful Kids, Television Segment, Social Med	dia, and Other (indic
include: TARE Date	E, AdoptUSKio	ds, Email Broadcast	t, Heart Gallery, Match CTIVE ADC Selection	th Party, Wendy's Wonderful Kids, Television Segment, Social Med	dia, and Other (indication distribution di distribution distribution distribution distribution d
include: TARE Date	E, AdoptUSKio	ds, Email Broadcast	t, Heart Gallery, Match CTIVE ADC Selection	th Party, Wendy's Wonderful Kids, Television Segment, Social Med	dia, and Other ( Dat
include: TARE Date Inquiry	Family	ds, Email Broadcast PROSPE Recruitment	t, Heart Gallery, Match CTIVE ADC Selection Staffing	th Party, Wendy's Wonderful Kids, Television Segment, Social Med <b>DPTIVE FAMILIES' INFORMATION</b> Reason whether or not family is chosen for	dia, and Other (indic Date CPA/FA

### Adding Adoption Inquiry Contacts

The **Prospective Families' Adoptive Information** form can be saved, closed, and re-opened again for editing so that inquiring families can be added to the list as needed. Families can be added to the list until all the rows on the template have been used. After that, you will need to create a new "Adoption Inquiries" contact on the **Contact Detail** page to add more inquiries.

To add another "Adoption Inquiries" contact:

1. From the **Contact Detail** page or the **Contact Search List** page, select the **Add** button.

Case Summary	Contact Search/List Contact Detail
Person	Contact Detail
Contacts/Summaries	
Service Authorization	* required fie ‡ conditionally required fie
Legal	Contact/Summary Type
Child Plans	
Placement	Contact Information
History	Contacted By: * Start Date: 01/04/2019
Medical	Estimated Time Hours: : Mins: : : Mins: : : : : : : : : : : : : : : : : : :
Foster Care Eligibility	<b>‡ Purpose:</b> Family Inquiries
PCA	Delete New Using Add Save
ICPC	
Case Management	Narrative

Case Summary	Contac	ct Sear	ch/List Contac	ot Detail				
Person	Cor	ntad	ct Searc	h List				
Contacts/Summaries							‡ conditionally	required field
Service Authorization	•	Cont	act Search	ı				
Legal	Sh	10w 10	✓ entries					
Child Plans			Date	Contact Type	Name	Purpose	Stage	Narr
Placement			Date	Contact Type	Name	ruipose	Stage	
History		0	01/04/2019	Adoption Inquiries		Family Inquiries	SUB	
Medical		0	01/04/2019	Adoption Inquiries		Family Inquiries	SUB	
		0	01/04/2019	Adoption Inquiries		Family Inquiries	SUB	
Foster Care Eligibility		0	01/04/2019	Adoption Inquiries		Family Inquiries	SUB	
PCA		0	05/02/2018	Contact		CVS Monthly Required(FTF)	SUB	*
ICPC		0	04/02/2018	Contact		Court Hearing	SUB	
Case Management	Sh	owing	1 to 6 of 6 entries					
		,					New Using	Add

- Repeat the steps you followed earlier to create an "Adoption Inquiries" contact, and select the Narrative button to open a new blank narrative form.
- 3. Fill in the form as you did before and select the **Save** icon in the tool bar.

 Exit the page back to the Contact Detail page to see that a checkmark is displayed next to the Narrative button to indicate a saved narrative for this contact.

Case Summary	Contact Search/List	Contact Detail
Person	Contact De	etail
Contacts/Summaries		
Service Authorization		* required field toonditionally required field
Legal	Contact/Sum	mary Type
Child Plans	* Type:	Adoption Inquiries
Placement	Contact Infor	mation
History	Contacted By:	
Medical	* Start Date:	01/04/2019
Foster Care Eligibility	Estimated Time with Client(s):	Hours: : Mins:
PCA	‡ Purpose:	Family Inquiries
ICPC	Delete	New Using Add Save
Case Management	Narrative	

### **Recruitment Activities Narrative**

If, instead of selecting "Family Inquiries," you select "Recruitment Activities" from the **Purpose** dropdown, a blank narrative is launched instead of the **Prospective Adoptive Families' Information** form.

Case Summary	Contact Search/List Contact Detail
Person	Contact Detail
Contacts/Summaries	* required field
Service Authorization	t conditionally required field
Legal	Contact/Summary Type
Child Plans	* Type: Adoption Inquiries
Placement	Contact Information
History	Contacted By:
Medical	* Start Date: 01/04/2019
Foster Care Eligibility	Estimated Time with Hours: : Mins: Clicat(e):
PCA	Family Inquiries           ‡ Purpose:         Recruitment Activities
ICPC	Delete
Case Management	Narrative

Use the blank narrative to enter updates about any recruitment activities for the child in adoption. Like the **Prospective Adoptive Families' Information** form, the blank narrative opens in a separate tab, contains the standard form toolbar, and can be re-opened later for additional updates.

File Edit View Favorites Too	ls Help
Lorem ipsum dolor sit <u>amet.</u> D	<u>Donec laoreet tincidunt sollicitudin dui. Proin sagittis turpis semper purus</u>

### Accessing the Saved Narratives

To access the **Contact Search List** page where you can find saved narratives, follow these steps:

1. From the **Contact Detail** page, select the **Contact Search/List** tab from the tertiary menu.

Case Summary	Contact Search/List	Contact Detail					
Person	Contact De	etail					
Contacts/Summaries							
		* required field					
Service Authorization		‡ conditionally required field					
Legal	Contact/Summary Type						
Child Plans	* Type:	Adoption Inquiries					
Placement	Contact Infor	mation					
History	Contacted By:						
Medical	* Start Date:	01/04/2019					
Foster Care Eligibility	Estimated Time with Client(s):	Hours: I Mins:					

- You will arrive at the Contact Search List page. Recognize that each of the Adoption Inquiry and Recruitment Activities contacts you created are listed under the Contact Search section. Note that the Narr column displays a checkmark for each contact that has a saved narrative.
- 3. Select one of the **Adoption Inquiry** or **Recruitment Activities** hyperlinks under **Contact Type** with a corresponding saved narrative.

Case Summary	Cor	ntact Sea	rch/List Contac	ct Detail				
Person	Сс	onta	ct Searc	h List				
Contacts/Summaries							‡ conditionally required	field
Service Authorization		Con	tact Search	ı				
Legal		Show 10	✓ entries					
Child Plans								
Placement			Date	Contact Type	Name	Purpose	Stage Narr	
History		0	01/04/2019	Adoption Inquiries		Family Inquiries	SUB	
Medical		0	01/04/2019	Adoption Inquiries		Recruitment Activities	SUB	
		0	01/04/2019 🔇	Adoption Inquiries	>	Family Inquiries	SUB 🕢	)
Foster Care Eligibility		0	01/04/2019	Adoption Inquiries		Family Inquiries	SUB	

- 4. You will arrive at the **Contact Detail** page.
- 5. At the **Contact Detail** page, you can select the **Narrative** button to re-open the form or narrative you created for the contact and make any needed edits or additions.

Case Summary	Contact Search/List Contact Detail	
Person	Contact Detail	
Contacts/Summaries		
Service Authorization	req ‡ conditionally req	quired field quired field
Legal	Contact/Summary Type	
Child Plans	* Type: Adoption Inquiries	
Placement	Contact Information	
History	Contacted By:	
Medical	* Start Date: 01/04/2019 📩	
Foster Care Eligibility	Estimated Time Hours: : Mins: : Wink Client(s):	
PCA	Purpose: Family Inquiries	
ICPC	Delete New Using Add Save	
Case Management	Narrative	

### **Contact Detail – ICPC Monthly Required FTF**

### **Overview**

When in the Substitute Care (**SUB**) stage only, you can now document **Interstate Compact for the Placement of Children (ICPC) Monthly Face-to-Face (FTF)** contacts from the **Contact Detail** page.

Stages Impacted: SUB (C-IC sub-stage)

### **Contact Detail Page – How to Get There**



1. Select the **Stage Name** hyperlink to a case in **SUB** stage on your **Assigned Workload** page (for a child with a C-IC sub-stage).

Workload	Workload												
Staff To-Do List	Assigned W	orkload											
Unit Summary	User Name :												‡ new stage
Unit Maintenance	User ID :											<ul> <li>Eligible For</li> </ul>	orker Safety r Screening Screened
Maintain Designee													
	Show 10 🗸 entries												₹
	SS ! W	/S Hir P/S	M-Ref Stage Name	County	Stage	Туре	Opened	Assigned	Region	Unit	Stage ID	Case ID 🕆	PGM
		Р	$\bigcirc$		SUB	C-IC	06/28/2016	04/11/2018	99	00			CPS
		Р					03/16/2017	04/11/2018	99	00			CPS
		Р					03/16/2017	04/11/2018	99	00			CPS
		Р					03/16/2017	04/11/2018	99	00			CPS

- 2. You will arrive at the **Case Summary** page.
- 3. Select **Contacts/Summaries** from the secondary menu.

Case Summary	Case Summary Ca	se Summar	y Tool Case To	-Do List	Event Li	st Event Sear	h Case His	story Pri	incipal Case History	Family Tree	PCSP		
Person	Case Sum	mary											
Contacts/Summaries	Case Name:	-											* required field
Service Authorization												‡ condition	ally required field
Legal	Attention:	ently in the		stage									
Child Plans		citily in the		otage									
Placement	Case Informa Case ID:	ation						Region:	99				
History	Status	Oper	1					start Date o		16/2017			
Medical												Expand	All Collapse All
Foster Care Eligibility	Show 10 🗸 entri	es											
PCA	Mrg	M-Ref	Stage Name	Stg	Туре	Opened	Time	Closed	Primary	Reg	Stage ID	Ov Dsp	Phone
ICPC	0					03/16/2017				99			
Case Management	0					03/16/2017				99			
	۲					03/16/2017				99			

4. You will arrive at the **Contact Detail** page.

Case Summary	Contact Search/List	Contact Detail			
Person	Contact Det	ail			
Contacts/Summaries					* required field
Service Authorization					required field
Legal	Contact/Sumn	nary Type			
Child Plans	* Type:	Contact	Y		
Placement	Contact Inform	nation			
History	Contacted By:			Select Staff	
Medical	* Contact Date:			‡ Time:	0
Foster Care Eligibility	‡ Attempted				
PCA	‡ Purpose:		~	‡ Method:	V
ICPC		Sibling Visit Included	đ		
Case Management	‡ Location:	V		‡ Others Contacted:	
	Principals/Col	laterals Contacted	ł		
	Name		Туре	Role	Relation/Interest
			Principal	No Role	Sibling

### **Contact Detail Page – ICPC Monthly FTF**

The **Contact Detail** page now allows you to document **ICPC Monthly FTF** contacts when in **SUB/C-IC** stage. If you select "Contact" from the **Type** dropdown, the **Purpose** field displays "ICPC Monthly Required (FTF)" as one of its dropdown options.

Case Summary	Contact Search/List Con	tact Detail		
Person	Contact Deta	il		
Contacts/Summaries				
Service Authorization				required field conditionally required field
Legal	Contact/Summa	агу Туре		
Child Plans	* Туре:	Contact		
Placement	Contact Informa	tion		
History	Contacted By:		Select Staff	
Medical	* Contact Date:		‡ Time:	0
Foster Care Eligibility	□ ‡ Attempted			
РСА	‡ Purpose:	Assessment	1 Method:	V
ICPC Case Management	‡ Location:	CSS Review - Full CSS Review - Other CSS Review - Other CSS Review - Screened Case Planning - Child Preparation	‡ Others Contacted:	Y
	Principals/Colla	Circles of Support Collateral Coord/Monitor		
	Name	Court Hearing External Provider - State Office Only Facility Visit	Role	Relation/Interest
		Family Group Conference Family Team Meeting	No Role	Sibling
		Forensic Assmt/Other Forensic Assmt/UT Goodbye Visit	No Role	Sibling
		Home Visit ICPC Monthly Required (FTF)	Primary Child	Self
		Immigration Summary Legal/Trial Prep. Notification	No Role	Aunt/Uncle

When you select the "ICPC Monthly Required (FTF)" option, the **Contact Detail** page behaves the same as when you select "CVS Monthly Required (FTF)" for the **Purpose** field in other stages. The same required and conditionally required fields must be completed before you can save the page.

Case Summary	Contact Search/List Contact Detail	l			
Person	Contact Detail				
Contacts/Summaries					*required field
Service Authorization					ly required field
Legal	Contact/Summary Typ	e			
Child Plans	* Type: Contact				
Placement	Contact Information				
History	Contacted By:		Select Staff		
Medical	* Contact Date: 01/04/20	119 📩	‡ Time:	03:45 PM	
Foster Care Eligibility	Estimated Time with Hours: Client(s):	: Mins:			
PCA	‡ Attempted				
ICPC	‡ Purpose: ICPC Mo	nthly Required (FTF)	‡ Method:	Face to Face	
Case Management			Announced	O Unannounced	
	Location: Foster H	ng Visit Included	‡ Others Contacte	d: Foster Parent	
	Principals/Collaterals (				
	Name	Туре	Role	Relation/Interest	
		Principal			
		Principal			
		Principal	1000		
		Principal			
		Principal			
	Delete				Save



**Note:** However, the "CVS Monthly Required (FTF)" option does not appear in the **Purpose** dropdown when in **SUB/C-IC** stage.

PCA	‡ Purpose:	Assessment	‡ Method:	
ICPC Case Management	‡ Location:	CSS Review - Full CSS Review - Other CSS Review - Screened Case Planning 	‡ Others Contacted:	M
	Principals/Colla	Circles of Support		
	Name	Court Hearing External Provider - State Office Only Facility Visit	Role	Relation/Interest
		Family Group Conference Family Team Meeting		-
		Forensic Assmt/Other Forensic Assmt/UT Goodbye Visit		
		Home Visit ICPC Monthly Required (FTF)	1000	
		Immigration Summary Legal/Trial Prep. Notification	10.000	
		Other Parent Child Visit Permanency Conference	10.000	
	Delete			Save

Nor does the "ICPC Monthly Required (FTF)" option appear for any stage other than **SUB/C-IC.** 

	Contact Detail					
Case Summary Case Summary Tool Case To-Do List Event List Event Search	Contact/Summary T	Vpe Contact				
Case Summary	Contact Information					
Case Name:	Contacted By:			Select Staff		
	* Contact Date:	<del></del>		‡ Time:		
Attention:	🗆 ‡ Attempted					
You are currently in the Garcia, Steven, SUB stage	‡ Purpose:	Assessment	1	‡ Method:		
Case Information Case ID: Status Open	‡ Location:	CSS Review - Full CSS Review - Other CSS Review - Screened CVS Monthly Required(FTF) Case Planning Child Preparation		‡ Others Contacted:		
Show 10 v entries	Name	Collateral Coord/Monitor Court Hearing	Туре	Role		
Mrg M-Ref Stage Name Stg Type Opened		External Provider - State Office Only Facility Visit Family Group Conference	Principal	No Role		
O INV MDNG2 04/08/2018		Family Team Meeting Forensic Assmt/Other Forensic Assmt/UT	Principal	No Role		
O INT MDNG2 04/08/2018		Goodbye Visit Home Visit	Principal	No Role		
O PAL REG 11/10/2018		Immigration Summary Legal/Trial Prep. Notification	Principal	No Role		
O SUB REG 11/09/2018		Other Parent Child Visit Permanency Conference	Principal	No Role		
		Placement Pre-Placement	Principal	No Role		
		Reassessment Sibling Visit	Principal	No Role		