Family-Based Safety Services – Overview
Contents
IMPACT 2.0 Updates to Family-Based Safety Services (FBSS) for Family Preservation (FPR)
Stage .............................................................................................................................................. 3
  Overview .................................................................................................................................... 3
New! Launch Removal Checklists from Conservatorship Removal Page................................. 3
New! Email Reminders for Expiring Service Authorizations...................................................... 4
New! Stage Closure Letters Just Got a Lot Easier! .................................................................... 5
Overview

The role of Family Preservation (FPR) staff is to provide Family-Based Safety Services (FBSS) to enhance the family's capacity to protect the child and reduce threats to a child's safety.

This training pertains to IMPACT 2.0 features and functionality that improve and enhance the processes for managing approved authorized services, launching a Removal Checklist from directly within IMPACT 2.0, system validations to support stage closure requirements, and stage closure letters.

New! Launch Removal Checklists from Conservatorship Removal Page

One of the biggest IMPACT 2.0 updates for FBSS in the FPR stage is that FBSS staff are now able to launch Removal Checklists from the Conservatorship Removal page!
New! Email Reminders for Expiring Service Authorizations

Other updates include email reminders for service authorizations sent seven (7) days before expiration. (This is in addition to the current Legacy IMPACT process of To-Do tasks for service authorizations at 30 days before expiration.)

The following information addresses a service authorization that will soon expire:

**Case Number:** [REDACTED]

**Case Name:** [REDACTED]

**Stage ID:** [REDACTED]

**Primary Client for Delivery of Services:** [REDACTED]

**Service:** Drug Testing-Oral Fluids

**Expiration Date:** 01/15/2019
New! Stage Closure Letters Just Got a Lot Easier!

There have also been changes to the Stage Closure page, and consequently, the FPR stage closure process.

Closing Letters have been moved from the Person Detail page to the Stage Closure page, where you can select to whom you'll send Closure Letters, and in which language (English or Spanish.)

Plus, moving the letters to the Stage Closure page now allows an authorized person to print all closure letters at once! Even better, although the Closure Letters will prefill with the name and contact information of the worker, they can be edited now!
Family-Based Safety Services – Service Auth Email Alerts
Contents
FPR – Service Authorization Email Alerts – An Introduction................................. 3
FPR – Service Authorization Detail Page – How to Get There .................................. 3
Service Authorization Detail Page – Email Reminders ............................................. 6
Service Authorization Email Reminders for FPR – The Rules.................................... 7
Service Authorization Email Reminders – What's in the Email?................................. 7
FPR – Service Authorization Email Alerts – An Introduction

IMPACT 2.0 has incorporated a new question on the Service Authorization Detail page regarding having an email reminder sent to the Primary worker on expiring service authorizations.

IMPACT 2.0 will send an automatic email notification to the Primary worker's email address seven (7) calendar days prior to the expiration of the Service Authorization, unless directed not to.

This email notification will be sent for an approved Service Authorization that meets specific criteria, and only in an open FPR stage.

Stages Impacted: FPR

FPR – Service Authorization Detail Page – How to Get There

Follow these steps to locate the Service Authorization Detail page:

1. From your Assigned Workload in the My Tasks tab, select the Stage Name hyperlink to the case.
2. You will arrive at the **Case Summary** page.

3. Select the **Service Authorization** tab on the secondary menu.

4. You will arrive at the **Service Authorization List** page.

5. Select a hyperlink in the **Type** column.
6. You will arrive at the **Service Authorization Header** page for the case.
7. Expand the **Service Authorization List** section.
8. Select a hyperlink under the **SA Detail ID** column.

9. You will arrive at the **Service Authorization Detail** page.
1. To enable or disable email reminders for expiring service authorizations, follow these steps:

2. Scroll to the bottom of the Service Authorization Information section to locate the item **Would you like an email reminder 7 days before the End date?**

3. Examine the radio buttons for "Yes" and "No." Recognize the default answer is "Yes", so unless you specifically select "No", you will receive an email notification.

4. Recognize that this field becomes enabled and required if the difference between **Begin** date and **End** date on Service Authorization Detail page is more than seven (7) calendar days.

**Note:** If the difference between **Begin** date and **End** date on the Service Authorization Detail page is seven (7) calendar days or fewer, the question will be disabled. If the question is marked "Yes" and there are fewer than 7 days between the supervisor approval and the service authorization **End** date, then the email will be sent automatically on the day following the supervisor's approval.

![Service Authorization Detail](image-url)
Service Authorization Email Reminders for FPR – The Rules

1. In order for a **Service Authorization** email reminder notification to be sent, certain conditions must be met:
   a. The **FPR** stage must be open.
   b. The **Authorization Type** on the **Service Authorization Detail** page is not "Terminate."
   c. The **Status** of the **Service Authorization** is "Approved" (APRV).

![Service Authorization Detail]

Service Authorization Email Reminders – What's in the Email?

1. The email reminder notification for an expiring Service Authorization prefills with information from the **Case Summary** page, the **Service Authorization Header** page, and the **Service Authorization Detail** page. It will follow this format:

2. **Email Subject Line:** Case # - SA <Primary Client for Delivery of Services on Service Authorization Header> - <Service on Service Authorization Header without code value> expires on <End date on Service Authorization Detail>

3. **From:** IMPACT

4. **To:** Email address of the primary assigned worker (non-end-dated, business email address)

5. **Attachment:** N/A

6. **Email body:** The following information addresses a Service Authorization that will soon expire:
   - **Case Number:** Prefilled with the **Case ID** from the **Case Summary** page.
   - **Case Name:** Prefilled with the **Case Name** from the **Case Summary** page.
   - **Stage ID:** Prefilled with the **Stage ID** from the **Case Summary** page.
   - **Primary Client for Delivery of Services:** Prefilled from the **Primary Client for Delivery of Services** field from the **Service Authorization Header** page.
   - **Service:** Prefilled from the **Service** field on the **Service Authorization Header** page.
   - **Expiration Date:** Prefilled from the **End** field from the **Service Authorization Detail** page.
The following information addresses a service authorization that will soon expire:

**Case Number:**

**Case Name:**

**Stage ID:**

**Primary Client for Delivery of Services:**

**Service:** Drug Testing-Oral Fluids

**Expiration Date:** 01/15/2019
Contents

FPR – Contact Detail Page – New Options, Deleted Options ......................................................... 3
Contact Detail Page for FPR – How to Get There ........................................................................... 3
Contact Detail Page – New Options in Purpose Field for FPR Stage .............................................. 5
Contact Detail Page – Deleted Options in Purpose Field for FPR Stage ........................................ 6
Contact Detail Page – "Final Visit" and Its Relationship with the Method Field ............................. 7
FPR – Contact Detail Page – New Options, Deleted Options

Two new options have been added to the dropdown for the Purpose field on the Contact Detail page, and they are visible only for the FPR stage. The new options are "Final Visit" and "Initial PCSP Contact."

The "CSS Review - Full," "CSS Review - Other," and "CSS Review - Screened" options have been removed for FBSS staff within the Purpose field dropdown whenever "Contact" or "Preliminary Kin Home Assmt" is selected as the Type.

Additionally, whenever "Final Visit" is selected for the Purpose field, the Method dropdown will automatically select the "Face-to-Face" option.

Stages Impacted: FPR

Contact Detail Page for FPR – How to Get There

To navigate to the Contact Detail page, follow these steps:

1. From your Assigned Workload in the My Tasks tab, select the Stage Name hyperlink to the case.
2. You will arrive at the **Case Summary** page.
3. Select the **Contacts/Summaries** tab on the secondary menu.

4. You will arrive at the **Contact Detail** page.
Contact Detail Page – New Options in Purpose Field for FPR Stage

To view the new options in the **Purpose** field on the **Contact Detail** page, follow these steps:

1. On the **Contact Detail** Page, locate the **Contact/Summary Type** section.
2. For the **Type** field, select "Contact" from the dropdown.
3. Proceed to the **Contact Information** section and identify the two new options in the **Purpose** field dropdown:
   - "Final Visit"
   - "Initial PCSP Contact"
In **FPR** stage, the following options will no longer appear within the **Purpose** field dropdown whenever "Contact" or "Preliminary Kin Home Assmt" is selected as the **Type**:

- "CSS Review - Full"
- "CSS Review - Other"
- "CSS Review - Screened"
Contact Detail Page – "Final Visit" and Its Relationship with the Method Field

1. Select "Final Visit" from the dropdown for the **Purpose** field.

2. Recognize how the **Method** field automatically selects the "Face-to-Face" option and the field is locked to editing.
Family-Based Safety Services – Removal Checklist
Contents
Removal Checklist in IMPACT 2.0 for FPR – An Introduction................................................... 3
Conservatorship Removal List Page – How to Get There....................................................... 3
Launching the Removal Checklist from the Conservatorship Removal Page......................... 6
Using IMPACT 2.0's New (Partly Prefilled!) Checklist......................................................... 7
Removal Checklist – Save and Stay vs. Save and Close ....................................................... 7
When Checklist Templates Are Revised - How It Affects You............................................... 8
**Removal Checklist in IMPACT 2.0 for FPR – An Introduction**

FBSS staff who have removed a child can now complete the **Removal Checklist** from within IMPACT 2.0 using existing Removal Checklist functionality implemented in Release 1 of IMPACT for Investigations (INV).

Once the **Conservatorship Removal** page is saved, you can *launch the Removal Checklist directly from the Conservatorship Removal page*, and toggle back and forth between the Removal Checklist page and the Conservatorship Removal page as needed!

You will learn how your checklists in-process, as well as checklists for future removals in the same case, are affected when updates are made to the Removal Checklist template by State Office.

**Stages Impacted:** FPR

---

### Conservatorship Removal List Page – How to Get There

Follow these steps to navigate to the **Conservatorship Removal** page in order to launch a Removal Checklist:

1. From your **Assigned Workload** in the **My Tasks** tab, select the **Stage Name** hyperlink to the case.
2. You will arrive at the **Case Summary** page.

3. Select **Conservatorship Removal** from the secondary menu.

4. You will arrive on the **Conservatorship Removal List** page.
To navigate to the Conservatorship Removal page, follow these steps:

5. On the Conservatorship Removal List page, select the Add button, or select an item from the list and select the New Using button.

6. Select the checkbox of the child or children to be removed and select the Continue button to be taken to the Conservatorship Removal page.

**Note:** Multiple children can be removed at the same time if they have the same removal date and the same reason for removal. By selecting each checkbox for each child, you will create SUB stages for each child all at once. The Removal Checklist will then be for that sibling group rather than having to create and manage a Removal Checklist for each child.
Launching the Removal Checklist from the Conservatorship Removal Page

To launch the Removal Checklist from the **Conservatorship Removal** page, follow these steps:

1. Once the **Conservatorship Removal** page is complete and saved, a **Launch Checklist** hyperlink will appear at the bottom of the **Conservatorship Removal** page.

2. Select the **Launch Checklist** hyperlink to launch a new Removal Checklist (or to return to a Removal Checklist that is in progress.)
**Using IMPACT 2.0's New (Partly Prefilled!) Checklist**

1. At the top of the checklist page, the **Child(ren) Name(s)**, **Case Name**, **Case ID**, and **Date of Removal** fields are prefilled from the Conservatorship Removal page.

2. To expand or collapse the sections of the checklist, select the arrow next to each individual section or select the **Expand All** or **Collapse All**.

3. As tasks on the checklist are completed, select the checkbox next to the task and add comments in the adjacent text box.

---

**Removal Checklist – Save and Stay vs. Save and Close**

1. Select the **Save and Stay** button at the end of each section to save your work and stay on the page. Caseworkers can complete multiple sections before selecting the **Save and Stay** button to save their information.

2. Select the **Save and Close** button at the end of the page to save your work and close the checklist browser page.

---

**Note:** While the stage is open, you can re-launch and edit the checklist by clicking on the Launch Checklist hyperlink.
When Checklist Templates Are Revised - How It Affects You

Here is some key information on how you may be affected when State Office issues a revised Removal Checklist template.

- When you start a new checklist, the newest version of the checklist template will automatically populate for you to use.
- If you have a checklist that is in progress when a new version of the checklist template is published, the existing in-progress checklist will remain available to you until the stage is closed.
- If an additional removal is started for other children in the same case while a previous Removal Checklist is in progress or completed, the new removal will use the newest version of the checklist template as of that date—even if it is different from the checklist used in the previous removal.

**Note:** If the same child is removed more than once in the same stage, and when you select the **Launch Checklist** hyperlink for that child, the system will provide the checklist for the previous removal, whether the status of the previous checklist is in-progress or completed. To complete the checklist for the current removal, do not delete the information in the **Date Completed** boxes that apply to the previous removal. Rather, add the dates the checklist items were completed relative to the current removal.
Family-Based Safety Services –
Stage Closure
Contents
Stage Closure for FPR – System Validation Alerts ................................................................. 3
Stage Closure Page for FPR – How to Get There.................................................................. 3
Stage Closure Page – Closure Information Section – Changes to Options for Reasons.......... 5
Stage Closure Page for FPR – Validation Error Message......................................................... 6
Stage Closure for FPR – System Validation Alerts

IMPACT 2.0 will perform numerous checks and validations before permitting the closure of an FPR stage.

In the case of certain specified closure reasons, the system will check to see if a Safety Assessment has been completed.

Stages Impacted: FPR

Stage Closure Page for FPR – How to Get There

To navigate to the Reason field dropdown on the Stage Closure page, follow these steps:

1. From your Assigned Workload in the My Tasks tab, select the Stage Name hyperlink to the case.
2. You will arrive at the **Case Summary** page.

3. Select **Case Management** from the secondary menu.

4. You will arrive at the **Case Maintenance** page.

5. Select **Close Family Preservation** tab on the tertiary menu.
6. You will arrive at the **Stage Closure** page.

---

**Stage Closure Page – Closure Information Section – Changes to Options for Reasons**

To select a reason for stage closure, follow these steps:
Under the **Closure Information** section, select a reason from the **Reason** dropdown.

**Note:** Compare the IMPACT 2.0 updated reasons to the former reasons in Legacy IMPACT:

- "Family moved" (replaced "Moved/unable to locate")
- "Unable to locate the family" (added as a new, separate dropdown option)
- "Only child died" (replaced "Death")
Stage Closure Page for FPR – Validation Error Message

If your stage closure attempt generates an error message and IMPACT 2.0 prevents you from closing the stage, follow these steps:

1. IMPACT 2.0 will present an error message box and will prevent closing an FPR stage if any of the following closure reasons are selected and an SDM Safety Assessment-FBSS has not been completed:
   - "Child outside of home/no CVS"
   - "Court ordered services closed"
   - "Risk is reduced in the family"
   - "Services inappropriate"
   - "Family refused/Legal impossible"

**Note:** You must complete an SDM Safety Assessment-FBSS before you will be able to close the FPR stage.

2. Select the hyperlink in the error message box, which will take you to the SDM Safety Assessment – FBSS page to complete the safety assessment.
Family-Based Safety Services –
Closing Letter
Contents
FBSS Closing Letter for FPR – Exciting New Features! .......................................................... 3
Stage Closure Page – How to Get There .................................................................................. 3
Generating and Editing an FBSS Closing Letter from the Stage Closure Page ...................... 5
Launching an FBSS Closing Letter to Edit and/or Print ......................................................... 6
The Print All Button for FBSS Closing Letters .................................................................... 7
The "New & Improved" FBSS Closing Letter: Prefilled, Yet Modifiable! ............................ 8
FBSS Closing Letter for FPR – Exciting New Features!

In IMPACT 2.0 you will now launch the FBSS Closing Letter from the **Stage Closure** page (rather than the **Person Detail** page as previously done in Legacy IMPACT.) This will become an extremely important feature—as all closing letters can be printed *at one time*, with the **touch of a single button** by an authorized person, from the **Stage Closure** page! What a timesaver!

Another great update to closing letters in IMPACT 2.0 is that closing letters will now be prefilled with the name, phone number and business office address of the primary worker—however, *now these fields are fully editable!*

A new section has been added to the **Stage Closure** page where you'll select the person(s) to whom the FBSS Closing Letter will be sent, and the language you want the letter to be in (English or Spanish.)

**Stages Impacted:** FPR

---

### Stage Closure Page – How to Get There

To navigate to the **Closure Notification Letters** section on the **Stage Closure** page, follow these steps:

1. From your **Assigned Workload** in the **My Tasks** tab, select the **Stage Name** hyperlink to the case.
2. You will arrive at the **Case Summary** page.

3. Select **Case Management** from the secondary menu.

4. You will arrive at the **Case Maintenance** page.

5. Select the **Close Family Preservation** tab on the tertiary menu.
6. You will arrive on the **Stage Closure** page.

---

**Generating and Editing an FBSS Closing Letter from the Stage Closure Page**

To edit and generate an **FBSS Closing Letter** from the **Stage Closure** page, follow these steps:

1. Locate the **Closure Notification Letters** section on the **Stage Closure** page.
2. For the desired **Person Name**, select the **Letter** type ("FBSS Closing Letter" or "FBSS Closing Letter Spanish.")
3. Select the **Generate** button to generate a web page of the letter, which you can edit. For example, editing is needed to add Resource information.

**Note:** The **Generate** button is only displayed while the **Stage Closure** page is in In Process status ("PROC") or Pending status ("PEND").
Launching an FBSS Closing Letter to Edit and/or Print

To edit and/or print a particular FBSS Closing Letter, select the **Launch** button.

**Note:** The **Launch** button displays once the **Stage Closure** page is approved by the supervisor (in APRV status.)
The Print All Button for FBSS Closing Letters

To print all the FBSS Closing Letters for all persons, follow these steps:
Select the **Print All** button to print *all* of the FBSS Closing Letters.

**Note:** The **Print All** button will appear only to staff selected by the supervisor to print the closing letters. If, upon approval of stage closure, your supervisor has assigned you to print the letters, then you will see a **Print All** button to select.

**NEW!**

**What a great feature!** No more trying to find someone to print the letters or printing each letter one by one! Your supervisor assigns the printing task to someone, the button appears on that person's **Stage Closure** page, and s/he can print all the letters at one time when selecting the **Print All** button!
The "New & Improved" FBSS Closing Letter: Prefilled, Yet Modifiable!

1. Examine an FBSS Closing Letter to identify the new prefilled fields.
2. Recognize these prefilled fields are editable.