



Texas Department of
Family and Protective Services

File Court Reports for Legal Hearing In IMPACT 2.0

Contents

Legal Notice – Overview of New Features and Functionality	3
Legal Status Page – Introduction.....	3
Legal Status Page – How to Get There to Access all Legal Tabs	4
Legal Status Page – Using the New Status Subtype Field.....	6
Legal Status Page – Using the New Status Subtype JMC Parent and Rel/Kin Checkbox	7
Legal Action and Outcome Page – Introduction	8
Legal Action and Outcome Page – Add a New Legal Action.....	9
Legal Notice List Page – Introduction	14
Legal Notice List Page – Download, Print, and Email	17
Legal Notice Detail Page – Introduction.....	Error! Bookmark not defined.
Legal Notice Detail Page – Using the New Page	Error! Bookmark not defined.

Legal Notice – Overview of New Features and Functionality

For the **Legal Status** page, a new field, **Status Subtype**, is added that is conditionally displayed when a particular status is selected.

A new checkbox, **JMC Parent and Rel/Kin**, (Joint Managing Conservators) is added and conditionally displayed when the selection from the **Legal Status** dropdown is **FPS Resp Terminated**.

Enhancements have been made to the **Legal Action and Outcome** page so that a caseworker can provide additional details regarding legal events on a case.

The **Legal Notice List** page is a new page in IMPACT 2.0 where staff can generate legal notices for court hearings and send the notices to recipients via email in IMPACT 2.0, or **save** and **download** the notices.

The **Legal Notice Detail** page is a new page in IMPACT 2.0 where staff can maintain the details of legal notices.

Legal Status Page – Introduction



For the **Legal Status** page, a new field, **Status Subtype**, is added that is conditionally displayed when the selection from the existing **Legal Status** dropdown is one of the following:

- TMC
- PMC/Rts Not Term
- PMC/Rts Term (All)
- PMC/Rts Term (Mother)
- PMC/Rts Term (Father)

The default value displayed in the **Status Subtype** field is N/A.

When TMC (Temporary Managing Conservatorship) is selected as the **Legal Status**, the **Status Subtype** dropdown displays:

- JTMC DPFS and Parent
- JTMC DFPS and Rel/Kin
- N/A

When any of the **PMC** (Permanent Managing Conservatorship) options is selected, the **Status Subtype** dropdown displays:

- JPMC DPFS and Parent
- JPMC DFPS and Kin/Rel
- N/A

A new checkbox, **JMC Parent and Rel/Kin**, (Joint Managing Conservators) is added and conditionally displayed when the selection from the **Legal Status** dropdown is **FPS Resp Terminated**.

Stages Impacted: SUB

Legal Status Page – How to Get There to Access all Legal Tabs



1. From your **Assigned Workload** page within the **My Tasks** tab, select the **Stage Name** hyperlink to the case.

Assigned Workload

SS	WS	Hr	P/S	M-Ref	Stage Name	County	Stage	Type	Opened	Assigned	Region	Unit	Stage ID	Case ID	PGM
<input type="checkbox"/>			P				SUB	REG	02/08/2018	03/23/2018	01	D1			CPS
<input type="checkbox"/>			P				SUB	REG	02/08/2018	03/23/2018	01	D1			CPS
<input type="checkbox"/>			S				FSU	REG	05/10/2017	06/27/2018	11	C5			CPS
<input type="checkbox"/>	!		P				SUB	REG	08/01/2017	08/23/2017	01	D1			CPS
<input type="checkbox"/>			P				SUB	REG	03/23/2016	04/03/2016	01	D1			CPS
<input type="checkbox"/>			P				ADO	REG	10/17/2018	10/17/2018	01	D1			CPS
<input type="checkbox"/>			S				SUB	REG	10/09/2018	10/11/2018	01	10			CPS

2. You will arrive at the **Case Summary** page.
3. Select the **Legal** tab in the secondary menu.

Case Summary

Attention:
You are currently in the SUB stage

Case Information

Case ID: [redacted] Region: 01
Status: Open Start Date of Case: 02/03/2018

Mrg	M-Ref	Stage Name	Stg	Type	Opened	Time	Closed	Primary	Reg	Stage ID	Ov Dsp	Phone
<input type="radio"/>			PAL	REG	11/10/2018				01			
<input type="radio"/>			SUB	REG	02/08/2018				01			
<input type="radio"/>			FSU	REG	02/08/2018				01			

- You arrive at the **Legal Actions List** page.
- Select the **Legal Status** tab in the tertiary menu.

Legal Actions List

Stage Name: # Submitted Events

Case ID:

Show 10 entries

Date Entered	Status	Type	Description	Stage	Stage Name	Case ID	Person	Entered By	Event ID
01/31/2019	NEW	Legal Action	CVS Hearing Status Hearing	SUB					
01/24/2019	COMP	Legal Action	Adjudications Conduct in Need of Supervision Adj 01/24/2019	SUB					
01/05/2019	COMP	Legal Action	Convictions Class C Conviction 01/04/2019	SUB					
07/16/2018	NEW	Legal Action	CVS Orders Placement Review Hearing Scheduled for 01/02/2019	SUB					
01/29/2018	COMP	Legal Action	CVS Orders Placement Review Hearing 07/16/2018	SUB					
12/05/2017	COMP	Legal Action	CVS Orders Placement Review Hearing 01/29/2018	SUB					
11/09/2017	COMP	Legal Action	CVS Orders PMC to Agency, Rts Term All 11/08/2017	SUB					
08/21/2017	COMP	Legal Action	Special Orders Other 08/16/2017	SUB					
03/21/2017	COMP	Legal Action	CVS Orders Extend TMC Dismissal Date 03/21/2017	SUB					
03/15/2017	COMP	Legal Action	CVS Orders Interlocutory Term. Mother 03/15/2017	SUB					

- You arrive at the **Legal Status List** page.
- Select the **Add** button.

Legal Status List

Stage Name: # Submitted Events

Case ID:

Date Entered	Status	Type	Description	Stage	Stage Name	Case ID	Person	Entered By	Event ID
02/26/2018	COMP	Legal Status	TMC 02/08/2018	SUB					

New Using **Add**

Reports

Reports:

Legal Status Page – Using the New Status Subtype Field

1. You will arrive at the **Legal Status** page.
2. Select a **Legal Status** that will result in the new **Status Subtypes** field to appear on the **Legal Status** page for PMC options.
3. Verify the **Status Subtypes** are:
 - JPMC DFPS and Parent
 - JPMC DFPS and Kin/Rel
 - N/A

The screenshot shows the 'Legal Status' page with a navigation bar at the top containing 'Legal Actions', 'Legal Actions for Case', 'Legal Status' (selected), 'Legal Status for Case', and 'Legal Notice'. Below the navigation bar is the 'Legal Status' title. The form includes fields for 'Stage Name' (required), 'Name' (conditionally required), and 'Legal Status' (required). The 'Legal Status' dropdown is set to 'PMC/ Rts Not Term'. The 'Status Subtype' dropdown is open, showing three options: 'JPMC DFPS and Parent', 'JPMC DFPS and Kin/Rel', and 'N/A'. Other fields include 'Court Number', 'Cause Number', 'TMC Dismissal', and 'Discharge Reason' (conditionally required). A 'Save' button is located at the bottom right.

Legal Actions Legal Actions for Case **Legal Status** Legal Status for Case Legal Notice

Legal Status

Stage Name : * required field

Name : † conditionally required field

Legal Status

* Legal Status : ▼

* Status Subtype : ▼

* Status Effective : ▼

* Legal County : ▼

† Discharge Reason : ▼

† Court Number : ▼

† Cause Number :

† TMC Dismissal : ⋮

Save

Legal Status Page – Using the New Status Subtype JMC Parent and Rel/Kin Checkbox

1. Select "FPS Resp Terminated" from the **Legal Status** dropdown and notice the **JMC Parent and Rel/Kin** checkbox displays and is enabled.
2. Check the **JMC Parent and Rel/Kin** checkbox.

Legal Actions Legal Actions for Case **Legal Status** Legal Status for Case Legal Notice

Legal Status

Stage Name: * required field

Name: ‡ conditionally required field

Legal Status

* Legal Status: * required field

* Status Effective:

* Legal County: * required field

‡ Discharge Reason:

JMC Parent and Rel/Kin

‡ Court Number:

‡ Cause Number:

‡ TMC Dismissal:

Save

Legal Action and Outcome Page – Introduction



Enhancements have been made to the **Legal Action and Outcome** page so that a caseworker can provide additional details regarding legal events on a case. New legal action types and subtypes have been added, and some existing ones have been modified. There are also some changes to the outcome types associated with legal actions.

Other additions to the **Legal Action and Outcome** page include:

- A new **Outcome Subtype** field to capture the subtype for the following outcomes:
 - TMC granted
 - PMC to Relative
 - PMC to Other
 - PMC to Fictive Kin
 - PMC to DFPS-Rts Not Terminated
 - PMC to DFPS-Rts Term (Mother)
 - PMC to DFPS-Rts Term (Father)
 - PMC to Parent
 - PMC to DFPS-Rts Term (All)
- A conditional requirement to complete the **Comment** field based on the value in the **Outcome** field. If the value is:
 - Other (indicate in comment field)
 - Transfer Order (indicate in comment field)
- A new **Scheduled Court Time** field to capture the scheduled court time.
- Validation prompts for caseworkers to update the **Legal Status** page if certain changes are made on the **Legal Action and Outcome page**.
- A new **Alert** for staff with a primary assignment to generate a **Legal Notice** for a **Court Hearing**.

Legal Action and Outcome Page – Add a New Legal Action

1. Select the **Legal Actions** tab on the tertiary menu to be directed to the **Legal Actions List** page.
2. Select the **Add** button on the **Legal Actions List** page.

Legal Actions List

Date Entered	Status	Type	Description	Stage	Stage Name	Case ID	Person
09/27/2018	COMP	Legal Action	CVS Orders Ex Parte Hearing 09/26/2018	SUB			

New Using Add

Reports: [dropdown] Launch

3. The **Legal Action and Outcome** page displays with the new **Subtype** dropdown field.
4. Identify the new and modified **Action** and **Subtypes** dropdown fields.

Legal Action and Outcome

Stage Name: Anaya,Ethan

* Action: CVS Hearing

* Subtype: [dropdown menu open]

‡ Outcome: [dropdown]

‡ Outcome Subtype: [dropdown]

Comments: [text area]

‡ Scheduled Court Date: [calendar icon]

‡ Scheduled Court Time: [clock icon]

‡ Date Filed: [calendar icon]

‡ Outcome/Court Date: [calendar icon]

Document in Case File [checkbox]

Save

Forms and Reports

Reports: [dropdown] Launch

5. Select "Agreed Orders-No Hearing" from the **Action** dropdown. Select "TMC granted" from the **Outcome** field.
6. Verify the **Outcome Subtype** dropdown field is enabled.
7. Review the new Outcomes and Outcome Subtypes.

Legal Action and Outcome

Stage Name :

Legal Action

* Action:

* Subtype:

‡ Outcome:

‡ Outcome Subtype:

Comments:

Document

Forms and Reports

Reports:

- Extend Ex Parte
- Care Custody and Control
- TMC granted
- Extend TMC Dismissal Date
- PMC to Relative
- PMC to Parent
- PMC to Other
- PMC to Fictive Kin
- PMC to DFPS-Rts Not Terminated
- PMC to DFPS-Rts Term All
- PMC to DFPS-Rts Term Mother
- PMC to DFPS-Rights Term Father
- Adoption Consummation
- Non Suit
- Ext. Court Jurisdiction past 18
- Medical Consenter Authorization
- Status Quo
- Other (indicate in comment field)
- Continuance
- Monitored Return
- Mediation
- To Extend Ex Parte
- Interlocutory Term Mother
- Interlocutory Term Any Father
- Transfer Order
- N/A

* required field
‡ conditionally required field

8. Select "CVS Hearing" from the **Action** dropdown.
9. Select "Status Hearing" from the **Subtype** dropdown.
10. Select a date from the **Scheduled Court Date** field.
11. Add a time in the **Scheduled Court Time** field.
12. Save the page.

Legal Action and Outcome

Stage Name : * required field
‡ conditionally required field

Legal Action

* Action: ‡ Scheduled Court Date:

* Subtype:

- Ex Parte Hearing
- Adversary Hearing
- Status Hearing
- Permanency Hearing Before Final Order
- Final Merits Hearing
- Permanency Hearing After Final Order
- Other

‡ Scheduled Court Time:

‡ Outcome:

‡ Outcome Subtype:

Date Filed:

‡ Outcome/Court Date:

Document in Case File

Comments:

[Save](#)

Forms and Reports

Reports: [Launch](#)

13. Verify the generation of an **Alert** for the status hearing.

Staff To-Do List

Search Criteria

From:  To: 

Show entries

Type	Date ↑	Stage Name ↑	Created By ↑	Description
<input type="checkbox"/>	Alert	02/25/2019	SYSTEM	Deliver Notice for Status Hearing scheduled on 04/02/2019 before 03/23/2019
<input type="checkbox"/>	Alert	02/27/2019	SYSTEM	Submit completed Universal Referral Form 2077 by 02/27/2019
<input type="checkbox"/>	Alert	02/27/2019	SYSTEM	Submit completed Universal Referral Form 2077 by 02/27/2019

Showing 1 to 3 of 3 entries

Reports

Reports:



Note: Alerts to inform workers to send out legal notices will be generated when a court date is entered for:

- Action as "CVS Hearing" AND
- Subtype as "Status Hearing," "Permanency Hearing Before Final Order," "Final Merits Hearing," "Permanency Hearing After Final Order" and "Other (indicate in comment field)"
- New validations for caseworkers to update the Legal Status page if certain changes are made on the page. The message "A Legal Action that indicates a change in the legal Status has been entered. Click "Ok" to update the Legal Status." will display on the save of the page. This will apply if the user enters any of the following:
 - Care Custody and Control
 - TMC granted
 - PMC to Relative
 - PMC to Parent
 - PMC to Other
 - PMC to Fictive Kin
 - PMC to DFPS-Rts Not Terminated
 - PMC to DFPS-Rts Term (All)
 - PMC to DFPS-Rts Term (Mother)
 - PMC to DFPS-Rts Term (Father)
 - Adoption Consummation
 - Non Suit

Legal Notice List Page – Introduction

The **Legal Notice List** page is a new page in IMPACT 2.0 where staff can generate legal notices for court hearings and send the notices to recipients via email in IMPACT 2.0, or save and download the notices for printing and USPS mailing.

With this change:

- Staff with primary assignments to a stage will receive an IMPACT generated alert to send a legal notice based on the scheduled court date and the type of hearing. Staff may also generate the notice without receiving an alert.
- Staff will be able to generate a notice for multiple children for whom the hearing is due on the same date and at the same court.
- Staff can select more than one recipient to send the notice to via email. The message will be sent using the blind carbon copy (BCC) address field to protect the privacy of all recipients.
- Authorized staff can save the generated notices in PDF format. These notices can be downloaded, printed and mailed via the post office.

Staff can generate legal notices for the following court hearing types:

- Status Hearing
- Permanency Hearing Before Final Order
- Permanency Hearing After Final Order
- Final Merits Hearing
- Other

Legal Actions Legal Actions for Case Legal Status Legal Status for Case **Legal Notice**

Legal Notice List

Case Name: [Redacted]
Case ID: [Redacted]

Expand All Cases Collapse All Cases

Notice Type	Generated On	Child Name/List	Scheduled Court Date	Generated By
<input type="radio"/> Status Hearing		Children List	01/31/2019	[Redacted]

Recipient Name	Status	Date Sent
<input type="radio"/> [Redacted]	Saved	01/31/2019

Download Launch Send Email New using Add Notice

Legal Notice Detail Page – Introduction

The Legal Notice Detail page is a new page in IMPACT 2.0 where staff can maintain the details of legal notices for each of the following court hearing types:

- Status Hearing
- Permanency Hearing Before Final Order
- Permanency Hearing After Final Order
- Final Merits Hearing
- Other

Legal notice types will be mapped to the subtypes on the **Legal Action and Outcome** page to retrieve data on scheduled court dates and scheduled court times.

Under the Recipient list, when the **Add** button is selected, the system will display an unduplicated person list for the entire case to select and add recipients.

Legal Notice Detail Page – Using the New Page

1. Select the **Legal Notice** tab on the tertiary menu to be directed to the **Legal Notice List** page.
2. Select the **Add Notice** button on the **Legal Notice List** page.

The screenshot shows the 'Legal Notice List' page. At the top, there is a navigation menu with tabs: 'Legal Actions', 'Legal Actions for Case', 'Legal Status', 'Legal Status for Case', and 'Legal Notice'. The 'Legal Notice' tab is selected and highlighted with a red box. Below the menu, the page title 'Legal Notice List' is also highlighted with a red box. The page displays case information: 'Case Name: [blurred]' and 'Case ID: [blurred]'. On the right side, there are links for 'Expand All Cases' and 'Collapse All Cases'. Below this is a table with the following columns: 'Notice Type', 'Generated On', 'Child Name/List', 'Scheduled Court Date', and 'Generated By'. The table contains one row: 'Status Hearing', 'Generated On', 'Children List', '01/31/2019', and '[blurred]'. Below the table is a recipient list with the following columns: 'Recipient Name', 'Status', and 'Date Sent'. The recipient list contains one entry: 'C. Williams', 'Saved', and '01/31/2019'. At the bottom of the page, there are several buttons: 'Download', 'Launch', 'Send Email', 'New using', and 'Add Notice'. The 'Add Notice' button is highlighted with a red box.

3. The **Legal Notice Detail** page displays.
4. Enter the required fields on the **Legal Notice Detail** page.
5. Select the **Add** button to add recipients to the Recipients List table.
 - Recipients will be pulled from the **Person List** page.
6. Select the **Save and Complete** button to save and complete the page, and return to the **Legal Notice List** page.

Legal Notice Detail

Stage Name: * required field

‡ conditionally required field

Attention:

- More than one cause number exists for this case; please generate separate legal notices for each cause number.

Notice Detail

* Notice Type:	<input type="text" value="Status Hearing"/>	* Scheduled Court Date:	<input type="text" value="12/12/2018"/>
Cause #:	<input type="text"/>	* Scheduled Court Time:	<input type="text" value="05:15 PM"/>
Court #:	<input type="text"/>	* Court Name:	<input type="text"/>
Legal County:	<input type="text"/>	* Court Address and Room #:	<input type="text"/>

Children List

Adams-Mccullou,Franches L

* Recipient List

Recipient Name	Address	City	State	Zip	Email Address	Additional Message
<input type="checkbox"/>	<input type="text"/>					



Note: Once the **Save and Complete** button is selected, the system will generate the legal notice in PDF format. The **Legal Notice Detail** page will then be read-only.

Legal Notice List Page – Download, Print, and Email

1. Select the **Legal Notice** tab on the tertiary menu to be directed to the **Legal Notice List** page.

The screenshot shows the 'Legal Notice List' page. At the top, there is a tertiary menu with five tabs: 'Legal Actions', 'Legal Actions for Case', 'Legal Status', 'Legal Status for Case', and 'Legal Notice'. The 'Legal Notice' tab is highlighted with a red box. Below the menu, the page title 'Legal Notice List' is displayed. Underneath, there are fields for 'Case Name:' and 'Case ID:'. To the right of these fields are links for 'Expand All Cases' and 'Collapse All Cases'. A table with the following columns is shown: 'Notice Type', 'Generated On', 'Child Name/List', 'Scheduled Court Date', and 'Generated By'. The table contains one row with the following data: 'Status Hearing', 'Generated On', 'Children List', '01/31/2019', and 'Generated By'. At the bottom of the page, there are several buttons: 'Download', 'Launch', 'Send Email', 'New using', and 'Add Notice'.

Legal Actions Legal Actions for Case Legal Status Legal Status for Case **Legal Notice**

Legal Notice List

Case Name: [Redacted]
Case ID: [Redacted]

Expand All Cases Collapse All Cases

Notice Type	Generated On	Child Name/List	Scheduled Court Date	Generated By
<input type="radio"/> Status Hearing		Children List	01/31/2019	[Redacted]

Download Launch Send Email New using Add Notice

2. Select the expando next to the **Notice Type** you want to download, print, or email.

Legal Actions Legal Actions for Case Legal Status Legal Status for Case Legal Notice

Legal Notice List

Case Name: [Redacted]
Case ID: [Redacted]

Expand All Cases Collapse All Cases

Notice Type	Generated On	Child Name/List	Scheduled Court Date	Generated By
<input type="radio"/> Status Hearing		Children List	01/31/2019	[Redacted]

Recipient Name	Status	Date Sent	
<input type="radio"/> [Redacted]	Saved	01/31/2019	Save

Download Launch Send Email New using Add Notice

3. Select a radio button next to the recipient you want to download, print, or email.

4. Select the **Download** button or the Launch button.

5. Select the **Send Email** button to email the Legal Notice as a PDF file.

Legal Actions Legal Actions for Case Legal Status Legal Status for Case Legal Notice

Legal Notice List

Case Name: [Redacted]
Case ID: [Redacted]

Expand All Cases Collapse All Cases

Notice Type	Generated On	Child Name/List	Scheduled Court Date	Generated By
<input type="radio"/> Status Hearing		Children List	01/31/2019	[Redacted]

Recipient Name	Status	Date Sent	
<input type="radio"/> [Redacted]	Saved	01/31/2019	Save

Download Launch Send Email New using Add Notice



Note: The PDF file of the Legal Notice can be attached to an email or printed and mailed via the post office.