



Texas Department of  
**Family and Protective Services**

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**.

| 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   |       |            |        |       | I&R  | 04/11/2018 | 04/11/2018 | 03     | EO   |          |         | PRS |
| <input type="checkbox"/> |    |    | P   |       |            |        |       | REG  | 08/21/2018 | 09/06/2018 | 03     | EO   |          |         | CPS |
| <input type="checkbox"/> | ⚠  |    | P   |       |            |        | SUB   | REG  | 02/13/2018 | 02/27/2018 | 03     | EO   |          |         | CPS |
| <input type="checkbox"/> |    |    | P   |       |            |        |       | REG  | 03/05/2018 | 03/27/2018 | 03     | EO   |          |         | CPS |

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

Case Summary

Person

**Contacts/Summaries**

Service Authorization

Legal

Child Plans

Placement

History

Medical

Foster Care Eligibility

PCA

ICPC

Case Management

Case Summary Case Summary Tool Case To-Do List Event List Event Search Case History Principal Case History Family Tree PCSP

**Case Summary**

Case Name: [redacted] \* required field  
‡ conditionally required field

Attention:  
 • You are currently in the Garcia,Steven, SUB stage

Case Information

Case ID: [redacted] Region: 03  
 Status: [redacted] Start Date of Case: 05/12/2012

Show 10 entries

| Mrg                   | M-Ref      | Stage Name | Stg        | Type  | Opened     | Time     | Closed     | Primary    | Reg | Stage ID   | Ov Dsp     | Phone      |
|-----------------------|------------|------------|------------|-------|------------|----------|------------|------------|-----|------------|------------|------------|
| <input type="radio"/> | [redacted] | [redacted] | [redacted] | MDNG2 | 04/08/2018 | 08:05 PM | 06/15/2018 | [redacted] | 07  | [redacted] | UTD        | [redacted] |
| <input type="radio"/> | [redacted] | [redacted] | [redacted] | MDNG2 | 04/08/2018 | 10:29 AM | 04/08/2018 | [redacted] | 99  | [redacted] | [redacted] | [redacted] |
| <input type="radio"/> | [redacted] | [redacted] | [redacted] | REG   | 11/10/2018 |          |            | [redacted] | 07  | [redacted] | [redacted] | [redacted] |

Expand All Collapse All

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

Person

**Contacts/Summaries**

Service Authorization

Legal

Child Plans

Placement

History

Medical

Foster Care Eligibility

PCA

ICPC

Case Management

Contact Search/List **Contact Detail**

**Contact Detail**

\* required field  
‡ conditionally required field

Contact/Summary Type

\* Type: Contact

Contacted By: [redacted] [Select Staff](#)

\* Contact Date: [ ] [📅](#) ‡ Time: [ ] [🕒](#)

‡ Attempted

‡ Purpose: [ ] ‡ Method: [ ]

‡ Sibling Visit Included

‡ Location: [ ] ‡ Others Contacted: [ ]

Principals/Collaterals Contacted

| Name                                | Type      | Role    | Relation/Interest |
|-------------------------------------|-----------|---------|-------------------|
| <input type="checkbox"/> [redacted] | Principal | No Role | Other             |
| <input type="checkbox"/> [redacted] | Principal | No Role | Cousin            |

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## Launching the New Prospective Adoptive Families' Information Form

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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 | Resources

Case Summary | Contact Search/List | **Contact Detail**

Person | **Contact Detail**

**Contacts/Summaries**

Service Authorization

Legal

Child Plans

Placement

History

Medical

Foster Care Eligibility

PCA

ICPC

Case Management

\* required field  
‡ conditionally required field

Contact/Summary Type

\* Type: Adoption Inquiries

Contact Information

Contacted By: [Redacted]

\* Start Date: 01/04/2019

Estimated Time with Client(s): Hours: [ ] : Mins: [ ]

‡ Purpose: Family Inquiries

Delete Save

Narrative

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

Document all families who inquire about a child throughout the time of adoption recruitment. The intent of this template is to capture a list of all families who inquire about a child throughout the time of recruitment. When all rows have been filled, please create a new contact type to continue the family inquiry list.

Document the name of each family who inquiries about the child, the date the inquiry was received, which recruitment tool was used, whether the family is chosen for the selection staffing, the reason the family was or was not selected, and the date the CPA or FAD was notified. Recruitment tool options can include: TARE, AdoptUSKids, Email Broadcast, Heart Gallery, Match Party, Wendy's Wonderful Kids, Television Segment, Social Media, and Other (indicate).

**PROSPECTIVE ADOPTIVE FAMILIES' INFORMATION**

| Date Inquiry Received: | Family Name: | Recruitment Tool: | Selection Staffing (Yes or No): | Reason whether or not family is chosen for selection staffing: | Date CPA/FAD notified: |
|------------------------|--------------|-------------------|---------------------------------|--|------------------------|
|                        |              |                   |                                 |  |                        |
|                        |              |                   |                                 |  |                        |
|                        |              |                   |                                 |  |                        |
|                        |              |                   |                                 |  |                        |
|                        |              |                   |                                 |  |                        |
|                        |              |                   |                                 |  |                        |
|                        |              |                   |                                 |  |                        |
|                        |              |                   |                                 |  |                        |
|                        |              |                   |                                 |  |                        |
|                        |              |                   |                                 |  |                        |

## 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.

Document all families who inquire about a child throughout the time of adoption recruitment. The intent of this template is to capture a list of all families who inquire about a child throughout the time of recruitment. When all rows have been filled, please create a new contact type to continue the family inquiry list.

Document the name of each family who inquiries about the child, the date the inquiry was received, which recruitment tool was used, whether the family is chosen for the selection staffing, the reason the family was or was not selected, and the date the CPA or FAD was notified. Recruitment tool options can include: TARE, AdoptUSKids, Email Broadcast, Heart Gallery, Match Party, Wendy's Wonderful Kids, Television Segment, Social Media, and Other (indicate).

| PROSPECTIVE ADOPTIVE FAMILIES' INFORMATION |              |                   |                                 |  |                        |
|--|--------------|-------------------|---------------------------------|--|------------------------|
| Date Inquiry Received:                     | Family Name: | Recruitment Tool: | Selection Staffing (Yes or No): | Reason whether or not family is chosen for selection staffing: | Date CPA/FAD notified: |
| 12/10/2018                                 | Doe          | AdoptUSKids       | Yes                             | Reason for selection staffing decision indicated here          | 12/12/2018             |
|  |              |                   |                                 |  |                        |
|  |              |                   |                                 |  |                        |

## 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

Legal

Child Plans

Placement

History

Medical

Foster Care Eligibility

PCA

ICPC

Case Management

\* required field  
‡ conditionally required field

Contact/Summary Type

\* Type: Adoption Inquiries

Contact Information

Contacted By: [Redacted]

\* Start Date: 01/04/2019

Estimated Time with Client(s): Hours: [ ] : Mins: [ ]

‡ Purpose: Family Inquiries

Delete | New Using | **Add** | Save

Narrative

Case Summary | **Contact Search/List** | Contact Detail

Person | **Contact Search List**

Contacts/Summaries

Service Authorization

Legal

Child Plans

Placement

History

Medical

Foster Care Eligibility

PCA

ICPC

Case Management

‡ conditionally required field

Contact Search

Show 10 entries

|                       | Date       | Contact Type       | Name       | Purpose                   | Stage | Narr |
|-----------------------|------------|--------------------|------------|---------------------------|-------|------|
| <input type="radio"/> | 01/04/2019 | Adoption Inquiries |            | Family Inquiries          | SUB   |      |
| <input type="radio"/> | 01/04/2019 | Adoption Inquiries |            | Family Inquiries          | SUB   |      |
| <input type="radio"/> | 01/04/2019 | Adoption Inquiries |            | Family Inquiries          | SUB   |      |
| <input type="radio"/> | 01/04/2019 | Adoption Inquiries |            | Family Inquiries          | SUB   |      |
| <input type="radio"/> | 05/02/2018 | Contact            | [Redacted] | CVS Monthly Required(FTF) | SUB   | ✓    |
| <input type="radio"/> | 04/02/2018 | Contact            | [Redacted] | Court Hearing             | SUB   | ✓    |

Showing 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.
- 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.

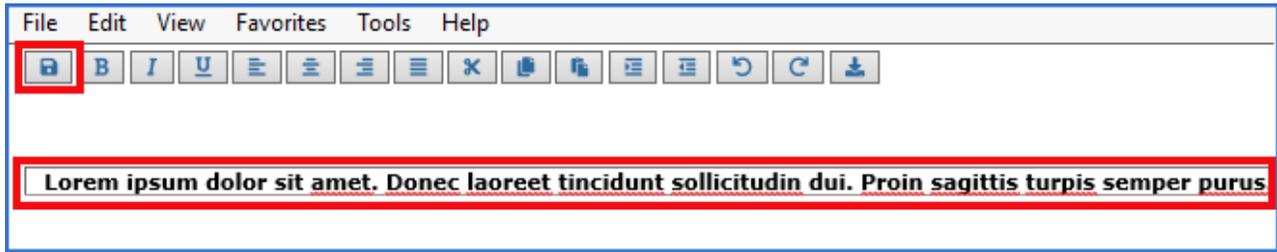
The screenshot shows the 'Contact Detail' page. The 'Contact/Summary Type' is set to 'Adoption Inquiries'. The 'Contact Information' section shows 'Contacted By' (blurred), 'Start Date' as 01/04/2019, and 'Estimated Time with Client(s)' with empty 'Hours' and 'Mins' fields. The 'Purpose' dropdown is set to 'Family Inquiries'. At the bottom, the 'Narrative' button has a checkmark next to it, indicating a saved narrative. Other buttons include 'Delete', 'New Using', 'Add', and 'Save'.

## 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.

This screenshot shows the 'Contact Detail' page with the 'Purpose' dropdown menu open. The 'Recruitment Activities' option is highlighted in blue. The 'Type' dropdown is still set to 'Adoption Inquiries'. The 'Start Date' is 01/04/2019. The 'Estimated Time with Client(s)' fields are empty. The 'Narrative' button at the bottom has a checkmark next to it. The 'Save' button is also visible.

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.



## 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.

2. 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 | Contact Search/List | Contact Detail

Person

**Contact Search List**

Contacts/Summaries | Service Authorization | Legal | Child Plans | Placement | History | Medical | Foster Care Eligibility

Conditionally required field

▶ Contact Search

Show 10 entries

| Date       | Contact Type       | Name | Purpose                | Stage | Narr |
|------------|--------------------|------|------------------------|-------|------|
| 01/04/2019 | Adoption Inquiries |      | Family Inquiries       | SUB   |      |
| 01/04/2019 | Adoption Inquiries |      | Recruitment Activities | SUB   |      |
| 01/04/2019 | Adoption Inquiries |      | Family Inquiries       | SUB   | ✓    |
| 01/04/2019 | Adoption Inquiries |      | Family Inquiries       | SUB   |      |

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

Contacts/Summaries | Service Authorization | Legal | Child Plans | Placement | History | Medical | Foster Care Eligibility | PCA | ICPC | Case Management

Required field | Conditionally required field

Contact/Summary Type

\* Type: Adoption Inquiries

Contact Information

Contacted By: [Redacted]

\* Start Date: 01/04/2019

Estimated Time with Client(s): Hours: [ ] : Mins: [ ]

‡ Purpose: Family Inquiries

Delete | New Using | Add | Save

**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).

| 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   | C-IC | 06/28/2016 | 04/11/2018 | 99     | 00   |          |         | CPS |
| <input type="checkbox"/> |   |    |    | P   |       |            |        |       |      | 03/16/2017 | 04/11/2018 | 99     | 00   |          |         | CPS |
| <input type="checkbox"/> |   |    |    | P   |       |            |        |       |      | 03/16/2017 | 04/11/2018 | 99     | 00   |          |         | CPS |
| <input type="checkbox"/> |   |    |    | P   |       |            |        |       |      | 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.

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

## 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
- Person
- Contacts/Summaries
- Service Authorization
- Legal
- Child Plans
- Placement
- History
- Medical
- Foster Care Eligibility
- PCA
- ICPC
- Case Management

Contact Search/List
Contact Detail

## Contact Detail

\* required field  
‡ conditionally required field

**Contact/Summary Type**

\* **Type:** Contact

**Contact Information**

Contacted By: [Redacted] Select Staff  
\* Contact Date: [Date] 📅 **‡ Time:** [Time] ⌚  
 **‡ Attempted**  
**‡ Purpose:** [Dropdown] **‡ Method:** [Dropdown]  
**‡ Location:** **‡ Others Contacted:** [Dropdown]

**Principals/Collateral**

| Name                                | Role          | Relation/Interest |
|-------------------------------------|---------------|-------------------|
| <input type="checkbox"/> [Redacted] | No Role       | Sibling           |
| <input type="checkbox"/> [Redacted] | No Role       | Sibling           |
| <input type="checkbox"/> [Redacted] | Primary Child | Self              |
| <input type="checkbox"/> [Redacted] | 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

Person

**Contacts/Summaries**

Service Authorization

Legal

Child Plans

Placement

History

Medical

Foster Care Eligibility

PCA

ICPC

Case Management

Contact Search/List
Contact Detail

## Contact Detail

\* required field  
‡ conditionally required field

**Contact/Summary Type**

\* Type:

---

**Contact Information**

Contacted By:

\* Contact Date:

‡ Time:

Estimated Time with Client(s): Hours:  : Mins:

‡ Attempted

‡ Purpose:

‡ Method:   Announced  Unannounced

Sibling Visit Included

‡ Location:

‡ Others Contacted:

---

**Principals/Collaterals Contacted**

| Name   | Type      | Role       | Relation/Interest |
|--|-----------|------------|-------------------|
| <input checked="" type="checkbox"/> [Redacted] | Principal | [Redacted] | [Redacted]        |
| <input type="checkbox"/> [Redacted]            | Principal | [Redacted] | [Redacted]        |
| <input type="checkbox"/> [Redacted]            | Principal | [Redacted] | [Redacted]        |
| <input type="checkbox"/> [Redacted]            | Principal | [Redacted] | [Redacted]        |
| <input type="checkbox"/> [Redacted]            | Principal | [Redacted] | [Redacted]        |

Delete Save



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

PCA

ICPC

Case Management

‡ Purpose:

‡ Location:

‡ Method:

‡ Others Contacted:

---

**Principals/Collaterals Contacted**

| Name                                | Role       | Relation/Interest |
|-------------------------------------|------------|-------------------|
| <input type="checkbox"/> [Redacted] | [Redacted] | [Redacted]        |
| <input type="checkbox"/> [Redacted] | [Redacted] | [Redacted]        |
| <input type="checkbox"/> [Redacted] | [Redacted] | [Redacted]        |
| <input type="checkbox"/> [Redacted] | [Redacted] | [Redacted]        |
| <input type="checkbox"/> [Redacted] | [Redacted] | [Redacted]        |

Delete Save

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

**Case Summary**

Case Name: [Redacted]

Attention: You are currently in the Garcia, Steven, SUB stage

Case Information

Case ID: [Redacted]

Status: Open

Show 10 entries

| Mrg                   | M-Ref      | Stage Name | Stg | Type  | Opened     |
|-----------------------|------------|------------|-----|-------|------------|
| <input type="radio"/> | [Redacted] | [Redacted] | INV | MDNG2 | 04/08/2018 |
| <input type="radio"/> | [Redacted] | [Redacted] | INT | MDNG2 | 04/08/2018 |
| <input type="radio"/> | [Redacted] | [Redacted] | PAL | REG   | 11/10/2018 |
| <input type="radio"/> | [Redacted] | [Redacted] | SUB | REG   | 11/09/2018 |

**Contact Detail**

Contact/Summary Type

\* Type: Contact

Contact Information

Contacted By: [Redacted] [Select Staff](#)

\* Contact Date: [Date Picker] [Time](#)

Attempted

[Purpose](#)

- Assessment
- CSS Review - Full
- CSS Review - Other
- CSS Review - Screened
- CVS Monthly Required(FTF)
- Case Planning
- Child Preparation
- Circles of Support
- Collateral
- Coord/Monitor
- Court Hearing
- External Provider - State Office Only
- Facility Visit
- Family Group Conference
- Family Team Meeting
- Forensic Assmt/Other
- Forensic Assmt/UT
- Goodbye Visit
- Home Visit
- Immigration Summary
- Legal/Trial Prep.
- Notification
- Other
- Parent Child Visit
- Permanency Conference
- Placement
- Pre-Placement
- Reassessment
- Sibling Visit

[Location](#)

[Method](#)

[Others Contacted](#)

Principals/Collateral

| Name                                | Type      | Role    |
|-------------------------------------|-----------|---------|
| <input type="checkbox"/> [Redacted] | Principal | No Role |
| <input type="checkbox"/> [Redacted] | Principal | No Role |
| <input type="checkbox"/> [Redacted] | Principal | No Role |
| <input type="checkbox"/> [Redacted] | Principal | No Role |
| <input type="checkbox"/> [Redacted] | Principal | No Role |
| <input type="checkbox"/> [Redacted] | Principal | No Role |
| <input type="checkbox"/> [Redacted] | Principal | No Role |
| <input type="checkbox"/> [Redacted] | Principal | No Role |
| <input type="checkbox"/> [Redacted] | Principal | No Role |