



Texas Department of
Family and Protective Services

Out-of-Region Monthly Contact Placement Information

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Placement Information - Tasks and Alerts

Overview

The primary caseworker receives an alert to complete the **2077 Referral** (Request for Kinship, Conservatorship, and Adoption Services) within seven (7) days of when a child is placed outside their legal region, or when the parent resides outside the region of the child's legal county.

Trigger Conditions for the Alert to Complete a 2077 Referral

In the **Substitute Care (SUB)** stage, IMPACT posts an alert for the "Primary Assigned" caseworker to **complete a 2077 Referral** whenever a child placement has been saved in IMPACT 2.0 and the following conditions are also present:

1. The child has a legal status.
2. The placement puts the child away from the parent(s) at an address that is either:
 - *outside of the region* of the child's legal county or
 - *inside of the region of the child's legal county, but outside of the region* of the child's parent's county.

IMPACT 2.0 posts the **2077 Referral** alert whenever a child is placed at an address that is outside of the region of the child's legal county, or when the child's address is *within* the region of the legal county, but the parent's address is *outside* of the legal county's region. IMPACT 2.0 processes the information from the child placement and the child's legal status to determine if either of these conditions is true and, if so, sends the alert to the caseworker.

Because IMPACT 2.0 needs both the placement and the child's legal status to determine if the alert is needed, the alert may be triggered by either the placement or legal status being added to IMPACT 2.0, whichever is the later of the two.

The alert notifies the caseworker to complete the **2077 Referral** within seven (7) days of the child's placement.

The screenshot displays the 'To-Do Detail' form in the IMPACT 2.0 system. The form is titled 'To-Do Detail' and is part of a 'Staff To-Do List'. It contains the following fields and information:

- Case Name:** [Redacted]
- Case ID:** [Redacted]
- To-Do Data:**
 - Due Date:** 02/22/2019
 - Completed Date:** [Empty]
 - Assigned To:** [Redacted]
 - Short Description:** Submit completed Universal Referral Form 2077 by 02/22/2019
 - Description/ Notes:** [Empty text area]
- Case Stage:**
 - Stage:** [Redacted]
 - Alert Type:** Placement
- Created By:**
 - Name:** [Redacted]
 - Date:** 02/15/2019

A 'Save' button is located at the bottom right of the form.



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Out-of-Region Monthly Contact Approval Status

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Approval Status – Assign Local Permanency Specialist (LPS) Supervisor and Out-of-Region Contact

Overview

In the **Substitute Care (SUB)** stage, when a placement is approved for a child placed outside the region of their legal county, IMPACT 2.0 notifies the approver that the system has initiated a secondary assignment to a Local Permanency Specialist (LPS) supervisor in that region. At that time, the approver is able to either accept the assignment or make a different selection prior to completing the assignment.

Approval Status – Approve Placement Page – How to Get There



1. Logon as the Approver/Supervisor.

The screenshot displays the 'Assigned Workload' section of the IMPACT 2.0 interface. The table below represents the data shown in the screenshot:

Case ID	WS	Hx	PYS	M-Hof	Stage Name	County	Stage	Type	Opened	Assigned	Region	Unit	Stage ID	Case ID	PYS
[checkbox]			P		[blurred]	TARRANT	SUB	REG	06/24/2018	06/07/2018	03	E7	[blurred]	[blurred]	CPS
[checkbox]			P		[blurred]	TARRANT	SUB	REG	06/24/2018	06/07/2018	03	E7	[blurred]	[blurred]	CPS
[checkbox]			P		[blurred]	TARRANT	FSU	REG	06/26/2018	06/04/2018	03	E7	[blurred]	[blurred]	CPS
[checkbox]			P		[blurred]	TARRANT	SUB	REG	06/26/2018	06/27/2018	03	E7	[blurred]	[blurred]	CPS
[checkbox]			P		[blurred]	TARRANT	FSU	REG	06/26/2018	07/12/2018	03	E7	[blurred]	[blurred]	CPS
[checkbox]			P		[blurred]	TARRANT	SUB	REG	06/26/2018	06/10/2018	03	E7	[blurred]	[blurred]	CPS
[checkbox]			P		[blurred]	TARRANT	FSU	REG	06/26/2018	06/04/2018	03	E7	[blurred]	[blurred]	CPS
[checkbox]	⚠		P		[blurred]	TARRANT	FSU	REG	10/12/2018	10/10/2018	03	E7	[blurred]	[blurred]	CPS
[checkbox]	⚠		S		[blurred]	TARRANT	SUB	REG	10/12/2018	10/17/2018	03	E4	[blurred]	[blurred]	CPS

2. Select the **Staff To-Do List** tab.
3. Select the task to approve the placement.

Staff To-Do List

Search Criteria

From: [] To: 02/05/2019

Show 4 entries

Type	Date	Stage Name	Created By	Description
<input type="checkbox"/> Task	01/30/2019		SYSTEM	ELF - Approve Placement for
<input type="checkbox"/> Alert	01/30/2019		SYSTEM	Approval Complete: Placement
<input type="checkbox"/> Alert	01/30/2019		SYSTEM	Approval Complete: Placement
<input type="checkbox"/> Alert	02/01/2019		SYSTEM	Submit completed Universal Referral Form 2077 by 02/01/2019

Showing 1 to 4 of 4 entries

Select All Delete New Query

Reports

Reports: [] Launch

4. You arrive at the **Placement Information** page.
5. Select the **Approval Status** button.

Placement Information

Stage Name: []

Approval Status

ALERT: DFPIS is reviewing placement in Foster Group Homes. Check with your supervisor for more information.

Placement Detail

Start Date: 02/12/2019 Emergency Placement

Placement Type: FFS Contracted Foster Placement

Intended to be Permanent Date: []

Placement Name

Agency: [] ID: []

Facility: [] ID: [] Select Facility

Living Arrangement: Place: Child Care Contact: []

6. You arrive at the **Approval Status - Approve Placement** page.

My Tasks | Case | Search | Reports | Resources

Case Summary | Placement Info | Placements for Case | Runaway/Missing | Service Level | Common Application

Approval Status - Approve Placement

Case Name: [redacted] * required field
Case ID: [redacted]

Current Status

Status	Date	Time	Approver
Pending			[redacted]

Approval Information

Approver: [redacted] Date: 01/30/2019 Time: 10:35 PM

Comments: [text area]

* Password: [password field]

Forms

Forms: [dropdown]

Approving the Assignment

When you approve an out-of-region placement, you can either assign the default LPS Supervisor in the region, as identified by IMPACT 2.0, or you can search for different LPS Supervisor to assign. Following are the steps you take when you wish to assign the default LPS Supervisor for the secondary assignment.

1. On the **Approval Status - Approve Placement** page, enter the required fields to approve the placement for a child and select the **Save** button.
2. A pop-up message window is displayed noting the name of the LPS Supervisor who is the default assignee for the secondary assignment. The pop-up displays an **OK** button and **Search** button.

Case Summary | Placement Info | Placements for Case | Runaway/Missing | Service Level | Common Application

Approval Status - Approve Placement

Case Name: [redacted] * required field
Case ID: [redacted]

Current Status

Status	Date	Time	Approver
Approved	01/30/2019	10:35 PM	[redacted]

Approval Information

Approver: [redacted] Date: 01/30/2019 Time: 10:35 PM

Comments: [text area]

* Password: [password field]

- To approve the secondary assignment to the default LPS supervisor, select the **OK** button.
- IMPACT automatically sends an alert to the LPS Supervisor notifying them of the secondary assignment.

Selecting the Search Button

Select the **Search** button in the pop-up window if you wish to assign a different LPS Supervisor than the one identified in the pop-up message. Selecting the **Search** button opens a modified version of the **Assign** page that displays the list of LPS Supervisors in the region in which the child has been placed. From this page, you can select a different LPS Supervisor from the same region or you can select a different region to display an alternate list of LPS Supervisors from which you can make the assignment.



Note: This modified version of the **Assign** page can only be accessed from the pop-up window that provides the **Search** button.

My Tasks
Case
Search
Reports
Resources

Workload

Staff To-Do List

Unit Summary

Unit Maintenance

Maintain Designers

Workload
Assign

Search Parameters

LPS supervisors Region Region 1

Search

Available Staff

Unit	Staff Name	Last Assigned	Time	Phone	Ext	Office Name
<input checked="" type="checkbox"/>	L1	08/24/2016	1:13:04 AM			

Secondary
Select Staff

Assignments

Stage Name	Name	Primary/Secondary
<input type="checkbox"/>		Primary
<input type="checkbox"/>		Secondary



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Assign – Assign LPS Supervisor

Overview

After approving a placement on the **Approval Status - Approve Placement** page, a pop-up confirmation message appears. Selecting the **Search** button opens a prefilled version of the **Assign** page. The approver can assign a LPS Supervisor from a list of relevant LPS Supervisors, after which the LPS Supervisor will receive an alert.

Accessing the Assign Page and Assigning an LPS Supervisor

When you approve an out-of-region placement, you have the option to search for a different LPS Supervisor for the secondary assignment rather than accept the default LPS Supervisor from IMPACT 2.0. To assign a different LPS Supervisor, follow these steps:

1. On the **Approval Status – Approve Placement** page, enter the required fields to approve the placement for a child and select the **Save** button.
2. A pop-up message window displays the name of the default LPS Supervisor and displays an **OK** button and **Search** button.

The screenshot shows the 'Approval Status - Approve Placement' page. A pop-up dialog box is displayed over the page, containing the following text: 'Approved as Region 04 has been assigned secondary to the [Name] LPS Supervisor. Click OK to complete the assignment or click Search to select another LPS Supervisor.' The dialog box has 'OK' and 'Search' buttons. The background page shows a sidebar with navigation options like 'Case Summary', 'Person', 'Comports/Summaries', 'Service Authorization', 'Legal', 'Child Plans', 'Placement', 'History', 'Medical', 'Foster Care Eligibility', 'PCA', 'ICPC', and 'Case Management'. The main content area includes tabs for 'Placement Info', 'Placement for Case', 'Renewal/Revising', 'Service Level', and 'Common Application'. Below the tabs, there are fields for 'Case Name', 'Case ID', and 'Current Status'. A table shows the 'Current Status' with columns for 'Status', 'Date', 'Time', and 'Approve'. The 'Approval Information' section includes fields for 'Approve', 'Date', 'Time', 'Comments', and 'Placement'.

Status	Date	Time	Approve
Approved	01/30/2019	10:05 PM	

3. Select the **Search** button to open the **Assign** page.
4. Identify the **Region** dropdown, which defaults to the region where the child is being placed.

The screenshot shows the 'Assign' page in a software interface. The page has a top navigation bar with 'My Tasks', 'Case', 'Search', 'Reports', and 'Resources'. A left sidebar contains 'Workload' (selected), 'Staff To-Do List', 'Unit Summary', 'Unit Maintenance', and 'Maintain Designee'. The main content area is titled 'Assign' and includes 'Search Parameters' with fields for 'List Supervisors', 'Region', and 'Region 4'. Below is an 'Available Staff' table with columns for Unit, Staff Name, Last Assigned, Time, Phone, Ext, and Office Name. At the bottom is an 'Assignments' table with columns for Stage Name, Name, and Primary/Secondary.

5. Recognize that the **Available Staff** section contains a list of LPS Supervisors in that region.
6. Recognize that you can change the selection in the **Region** dropdown and select **Search** to display a different list of LPS Supervisors in the **Available Staff** section.
7. Select the radio button for the LPS Supervisor you wish to assign as the secondary.
8. Select the **Secondary** button to mark the supervisor for the secondary assignment.
9. Select the **Save** button to assign the LPS Supervisor and to send the secondary assignment alert.



Note: Alternately, you can select the **Select Staff** button under the **Available Staff** section and perform a search for a specific LPS Supervisor to add to the **Available Staff** list.

The screenshot shows a web application interface with the following sections:

- Navigation:** My Tasks, Case, Search, Reports, Resources.
- Left Sidebar:** Workload, Staff To Be List, Unit Summary, Unit Maintenance, Unit's Designees.
- Assign Button:** A blue button labeled "Assign" is highlighted with a red box.
- Search Parameters:** Includes "LPS Supervisors" and a "Region" dropdown menu set to "Region 4".
- Available Staff Table:**

Unit	Staff Name	Last Assigned	Time	Hours	ED	Office Hours
11	[Redacted]	11/11/2012				
- Assignments Table:**

Staff Name	Hours	Primary/Secondary
[Redacted]	[Redacted]	Primary
<input type="checkbox"/>	[Redacted]	Secondary
<input type="checkbox"/>	[Redacted]	Secondary
- Buttons:** "Save" and "Cancel" buttons are at the bottom right, with "Save" highlighted by a red box.
- Footer:** A "Phone" icon is located at the bottom left.



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Contact Detail - Alert for CVS Monthly Required (FTF)

Overview

When the LPS Worker selects "CVS Monthly Required (FTF)" from the dropdown menu under **Purpose** and then selects **Save** on the **Contact Detail** page for the first time, IMPACT sends an **Alert** to the Primary assigned worker.

The description appearing on the **To-Do Detail** page states, "CVS Monthly Required (FTF) has been completed for <First Name Last Name>(child)."

Triggering the Alert for CVS Monthly Required (FTF)

Whenever a secondary assigned LPS Worker initially creates and saves a **CVS Monthly Required (FTF)** contact for a child on the **Contact Detail** page, IMPACT sends an alert to the primary assigned worker. The alert is triggered the first time the LPS Worker selects a child who is the subject of the FTF contact from the **Principals/Collaterals Contacted** section, selects "CVS Monthly Required (FTF)" from the **Purpose** dropdown, and selects the **Save** button.

The following alert will appear on the primary assigned worker's **To-Do Detail** page:

"CVS Monthly Required (FTF) has been completed for <First Name Last Name> (child)"

