



Texas Department of
Family and Protective Services

FBSS Monthly Evaluation

In IMPACT 2.0

Job Aid

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Contact Detail Page

A new **Caregiver(s) and Child(ren)** section has been added to the **Contact Detail** page that displays in **FPR** stage when you select "Monthly Evaluation" from the **Type** dropdown menu. The section displays a person list that is prefilled from the **Person List** page. You will then select the person(s) from the list for your Contact(s) and then save them to the **Contact Detail** page.



Note: You must select at least one person from the *Caregiver(s) and Child(ren) list* before you can select the **Save** button.

When you select the **Narrative** button after saving the page, a new blank **CPS Monthly Evaluation/Assessment** form is launched, prefilled with current information from several other IMPACT pages.

Impact 2.0 continues to allow you to launch the contacts for a **Monthly Evaluation** by using the **Forms** section at the bottom of the Monthly Evaluation.

A new **Download** button also appears on the **Contact Detail** page and displays after you have launched and saved the narrative at least once. The **Download** button allows you to download and save the **CPS Monthly Evaluation/Assessment** form as a PDF.

If you should arrive at the **Contact Detail** page after selecting the hyperlink for a saved Monthly Evaluation on the **Contact Search List** page, the **New Using** button will be hidden on the **Contact Detail** page so as not to be used with the selected Monthly Evaluation.

Monthly Evaluation contacts that were entered in Legacy IMPACT will be displayed and launched post-Release 2.0. The narrative will be populated with the data that was entered and saved prior to Release 2.0. The narrative will remain editable until the **Contact Detail** page is approved by the supervisor.

Stages Affected: FPR

Contact Detail Page – How to Get There

1. To navigate to your **Monthly Evaluation** page, start from the **My Tasks** tab on your **Assigned Workload** page.
2. Select the **Stage Name** hyperlink for the Monthly Evaluation.

Texas Department of Family and Protective Services

My Tasks | Case | Search | Reports | Resources

Workload | Workload

Staff To-Do List

Assigned Workload

User Name : [redacted]
User ID : [redacted]

Show 10 entries

SS	!	WS	Hr	P/S	M-Ref	Stage Name	County	Stage	Type	Opened	Assigned	Region
<input type="checkbox"/>	!	⚠		P	[redacted]	[redacted]	BEXAR	FPR	REG	06/20/2018	06/21/2018	08
<input type="checkbox"/>				P	[redacted]	[redacted]	BEXAR	FPR	REG	09/24/2018	09/25/2018	08

new stage
 ⚠ Worker Safety
 ● Eligible For Screening
 Ⓞ Screened

3. You will arrive at the **Case Summary** page.
4. Select the **Contacts/Summaries** secondary tab.

My Tasks | Case | Search | Reports | Resources

Case Summary | 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 [redacted], FPR stage

Case Information
 Case ID: [redacted] Region: 03
 Status: Open Start Date of Case: 05/22/2018

Show 10 entries

Mrg	M-Ref	Stage Name	Stg	Type	Opened	Time	Closed	Primary	Reg	Stage ID	Ov Dsp	Phone
Ⓞ	[redacted]	[redacted]	FPR	REG	08/21/2018			[redacted]	08	[redacted]		
○	[redacted]	[redacted]	INV	SXAB2	05/23/2018	01:01 PM	08/21/2018	[redacted]	08	[redacted]		
○	[redacted]	[redacted]	INT	SXAB2	05/22/2018	07:46 PM	05/23/2018	[redacted]	08	[redacted]		

Expand All Collapse All

- You will arrive at the **Contact Detail** page.
- From the **Type** dropdown, select "Monthly Evaluation."

The screenshot shows the 'Contact Detail' page with the 'Type' dropdown menu set to 'Monthly Evaluation'. The page includes a sidebar with navigation options like 'Case Summary', 'Review Investigation', and 'Person'. The main content area has sections for 'Contact/Summary Type', 'Contact Information', 'Contact Summary Period', and 'Caregiver(s) and Child(ren)'. The 'Caregiver(s) and Child(ren)' table lists two entries with roles 'Designated Victim' and 'Sibling'.

Name	Type	Role	Relation/Interest
[Redacted]	Principal	Designated Victim	Sibling
[Redacted]	Principal	Designated Victim	Sibling

- The **Contact Detail** page refreshes and displays the page view for "Monthly Evaluation."

This screenshot shows the 'Contact Detail' page after a refresh. The 'Type' dropdown remains 'Monthly Evaluation'. The 'Caregiver(s) and Child(ren)' table now contains six entries with various roles and relationships. At the bottom, there are buttons for 'Delete', 'Narrative', 'Forms', and 'Save and Submit'.

Name	Type	Role	Relation/Interest
[Redacted]	Principal	Designated Victim	Sibling
[Redacted]	Principal	Designated Victim	Sibling
[Redacted]	Principal	Designated Victim	Oldest Victim
[Redacted]	Principal	Unknown/Unable to Determine	Cousin
[Redacted]	Principal	Designated Perpetrator	Parent
[Redacted]	Collateral	No Role	Par's Paramour

Review – Monthly Evaluation Contact Detail Page

1. On the **Contact Detail** page, select “Monthly Evaluation” from the **Type** dropdown.
2. The page refreshes to display the page view for Monthly Evaluation with the new **Caregiver(s) and Child(ren)** section prefilled with information from the **Person List** page.
3. Recognize that each row of the list shows a checkbox and you must select at least one checkbox from the **Caregiver(s) and Child(ren)** section before you can Save or Save and Submit the page.
4. Enter the date of contact in the **Contact Date** field (required field).
5. Enter the **From:** and **To:** dates for the Contact Summary Period (required fields).

Contact Search/List
Contact Detail

- Case Summary
- Review Investigation
- Conservatorship Removal
- Person
- Contacts/Summaries
- Service Authorization
- Legal
- SDM Assessments
- Family Plans
- Medical
- Case Management

Contact Detail

Contact/Summary Type

* **Type:** Monthly Evaluation

Contact Information

Contacted By: ██████████

* **Contact Date:** 02/03/2019 ↑ conditionally required field

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

Contact Summary Period

↑ **From:** 02/03/2019 ↑ required field **To:** 02/03/2019

Caregiver(s) and Child(ren)

Name	Type	Role	Relation/Interest
<input type="checkbox"/> ██████████	Principal	Designated Victim	Sibling
<input type="checkbox"/> ██████████	Principal	Designated Victim	Sibling
<input checked="" type="checkbox"/> ██████████	Principal	Designated Victim	Oldest Victim
<input type="checkbox"/> ██████████	Principal	Unknown/Unable to Determine	Cousin
<input checked="" type="checkbox"/> ██████████	Principal	Designated Perpetrator	Parent

Delete
Save and Submit
Save

Narrative

6. Select the **Save** button.
7. The information is saved to the page.
8. Select the **Narrative** button.
9. The **CPS Monthly Evaluation/Assessment** form is opened in a new tab.

CPS MONTHLY EVALUATION/ ASSESSMENT

Case Name:	[REDACTED]
Date FPR Stage Opened:	08/21/2018
Caseworker Name:	[REDACTED]
Date of Evaluation:	02/03/2019

COURTESY WORKER (Address courtesy worker requests and role if applicable.)

CAREGIVER(S) AND CHILD(REN)

Name	Rel/Int	D.O.B	Last FPR FTF Contact	Person Characteristics	Is this an absent parent? (Yes or No)
[REDACTED]	Oldest Victim Parent	[REDACTED]	10/12/2018 08/30/2018		

Additional Information

PARENTAL CHILD SAFETY PLACEMENTS (PCSP)

Child in PCSP	Start Date	End Date	PCSP Caregiver	Relationship to Child
[REDACTED]	11/21/2018		[REDACTED]	

Additional Information

10. Select the **Save** icon from the form toolbar.
11. Return to the **Contact Detail** page tab and select **Save** again.
12. Recognize that the **Download** button is displayed on the **Contact Detail** page after you save the **CPS Monthly Evaluation/Assessment** form.
13. Recognize that the saved Narrative is indicated by a checkmark beside the **Narrative** button.

- Case Summary
- Review Investigation
- Conservatorship Removal
- Person
- Contacts/Summaries
- Service Authorization
- Legal
- SDM Assessments
- Family Plans
- Medical
- Case Management

Contact Search/List
Contact Detail

Contact Detail

*required field
‡ conditionally required field

Contact/Summary Type

* Type: Monthly Evaluation ▼

Contact Information

Contacted By: [Redacted]

* Contact Date: 02/03/2019 📅 ‡ Time: [Redacted] ⌚

Estimated Time with Client(s): Hours: 1 : Mins: 10

Contact Summary Period

‡ From: 02/03/2019 📅 ‡ To: 02/03/2019 📅

Caregiver(s) and Child(ren)

Name	Type	Role	Relation/Interest
<input type="checkbox"/> [Redacted]	Principal	Designated Victim	Sibling
<input type="checkbox"/> [Redacted]	Principal	Designated Victim	Sibling
<input checked="" type="checkbox"/> [Redacted]	Principal	Designated Victim	Oldest Victim
<input type="checkbox"/> [Redacted]	Principal	Unknown/Unable to Determine	Cousin
<input checked="" type="checkbox"/> [Redacted]	Principal	Designated Perpetrator	Parent
<input type="checkbox"/> [Redacted]	Collateral	No Role	Friend
<input type="checkbox"/> [Redacted]	Collateral	No Role	Par's Paramour

Delete
Download
Add
Save and Submit
Save

Narrative

14. Select the **Download** button.
15. Select the **Open** button from the pop-up message.
16. Recognize that the **CPS Monthly Evaluation/Assessment** downloads in PDF format that you can print to your local printer.



Note: The fields on the page are still editable. If needed, you can select additional contacts from the list for the contact period and save again.

CPS Monthly Evaluation Assessment 1.0 - Adobe Acrobat Reader DC

File Edit View Window Help

Home Tools CPS Monthly Evalu... x

CPS MONTHLY EVALUATION/ ASSESSMENT

Case Name: [REDACTED]

Date FPR Stage Opened: 08/21/2018

Caseworker Name: [REDACTED]

Date of Evaluation: 02/03/2019

COURTESY WORKER (Address courtesy worker requests and role if applicable.)

CAREGIVER(S) AND CHILD(REN)

Name	Rel/Int	D.O.B	Last FPR FTF Contact	Person Characteristics	Is this an absent parent? (Yes or No)
[REDACTED]	Oldest Victim	11/26/2007	10/12/2018		
[REDACTED]	Parent	09/20/1989	08/30/2018		

Additional Information

PARENTAL CHILD SAFETY PLACEMENTS (PCSP)

Child in PCSP	Start Date	End Date	PCSP Caregiver	Relationship to Child
[REDACTED]	11/21/2018		[REDACTED]	

Additional Information

Monthly Evaluation Contact Detail Page – New Using Button Removed

1. Select the **Contact Search/List** tab.
2. You will arrive at the **Contact Search/List** page.
3. Select the hyperlink for a Monthly Evaluation under the **Contact Type** column.

My Tasks | Case | Search | Reports | Resources

Case Summary | Review Investigation | Conservatorship Removal | Person | **Contacts/Summaries** | Service Authorization | Legal | SDM Assessments | Family Plans | Medical | Case Management

Contact Search/List | Contact Detail

Contact Search List

Conditionally required field

Contact Search

Show 10 entries

Date	Contact Type	Name	Purpose	Stage	Narr
02/03/2019	Monthly Evaluation	[Redacted]		FPR	✓
02/03/2019	Monthly Evaluation	[Redacted]		FPR	✓
02/03/2019	Monthly Evaluation	[Redacted]		FPR	✓
01/14/2019	Preliminary Kin Home Assmt	[Redacted]	Initial	FPR	
01/02/2019	Monthly Evaluation	[Redacted]		FPR	
01/02/2019	Monthly Evaluation	[Redacted]		FPR	✓

4. You will arrive at the **Contact Detail** page.
5. Recognize that the **New Using** button is no longer available on the **Contact Detail** page when you select a Monthly Evaluation hyperlink at the **Contact Search List** page.

Case Summary | Review Investigation | Conservatorship Removal | Person | **Contacts/Summaries** | Service Authorization | Legal | SDM Assessments | Family Plans | Medical | Case Management

Contact Search/List | **Contact Detail**

Contact Detail

Required field | Conditionally required field

Contact/Summary Type

Type: Monthly Evaluation

Contact Information

Contacted By: [Redacted]

Contact Date: 02/03/2019

Time: [Redacted]

Estimated Time with Client(s): Hours: 1 : Mins: 10

Contact Summary Period

From: 02/03/2019 | To: 02/03/2019

Caregiver(s) and Child(ren)

Name	Type	Role	Relation/Interest
<input checked="" type="checkbox"/> [Redacted]	Principal	Designated Victim	Sibling
<input checked="" type="checkbox"/> [Redacted]	Principal	Designated Victim	Sibling
<input checked="" type="checkbox"/> [Redacted]	Principal	Designated Victim	Oldest Victim
<input type="checkbox"/> [Redacted]	Principal	Unknown/Unable to Determine	Cousin
<input checked="" type="checkbox"/> [Redacted]	Principal	Designated Perpetrator	Parent
<input type="checkbox"/> [Redacted]	Collateral	No Role	Friend

Delete | Download | Add | Save and Submit | Save

Narrative ✓

Monthly Evaluation Assessment Form

The **CPS Monthly Evaluation/Assessment** form has been completely redesigned for Release 2.0 with a new layout, several added sections, user-editable fields, and fields now prefilled with information from IMPACT. The **CPS Monthly Evaluation/Assessment** form is launched from the **Contact Detail** page in **FPR** stage.



Note: *The redesigned form does not apply to Monthly Evaluation Contacts entered prior to Release 2.0. The Legacy **CPS Monthly Evaluation/Assessment** form will continue to be launched for pre-Release 2.0 Contacts.*

The form displays the standard form toolbar containing the **Save** icon that can be used to save the form at any point during form entry. When saved and closed, a checkmark will display next to the **Narrative** button to indicate a saved **CPS Monthly Evaluation/Assessment** form. To reopen the form, select the **Narrative** button at the **Contact Detail** page. The prefilled fields will refresh with any information updated since the last time the form was saved. The form is editable until you select the **Save and Submit** button at the **Contact Detail** page which locks the form. However, even after saving and submitting, the form will still be refreshed with updated information from IMPACT each time the form is launched from the **Contact Detail** page until the last day of the evaluation month (i.e., the month of the **Contact Date** field on the **Contact Detail** page) or until supervisor approval, whichever is earlier.



Note: *The **Working Log Narratives (Contact Log Narratives)** will continue to be prefilled from information contained in the **CPS Monthly Evaluation/Assessment** form. No change has been made to this functionality.*

Stages Affected: FPR

Review – Monthly Evaluation/Assessment Form

1. The **CPS Monthly Evaluation/Assessment** form is launched from the **Contact Detail** page using the **Narrative** button after the required date fields have been entered, one or more persons have been selected from the **Caregiver(s) and Child(ren)** list, and the page has been saved.
2. At the **CPS Monthly Evaluation/Assessment** form, recognize how your selections from the **Caregiver(s) and Child(ren)** section of the **Contact Detail** page prefill into the **CPS Monthly Evaluation/Assessment**.
3. Examine how data from IMPACT prefills into the **CPS Monthly Evaluation/Assessment** form. Recognize that prefilled sections will always display on the form even if there is no data.

CPS MONTHLY EVALUATION/ ASSESSMENT

Case Name: [Redacted]
 Date FPR Stage Opened: 08/21/2018
 Caseworker Name: [Redacted]
 Date of Evaluation: 02/03/2019

COURTESY WORKER (Address courtesy worker requests and role if applicable.)

CAREGIVER(S) AND CHILD(REN)					
Name	Rel/Int	D.O.B	Last FPR PTF Contact	Person Characteristics	Is this an absent parent? (Yes or No)
[Redacted]	Oldest Victim	11/26/2007	10/12/2018		
	Parent	09/20/1989	08/30/2018		

Additional Information

PARENTAL CHILD SAFETY PLACEMENTS (PCSP)				
Child in PCSP	Start Date	End Date	PCSP Caregiver	Relationship to Child
[Redacted]	11/21/2018		[Redacted]	

Additional Information

CONTACT SUMMARY

No records exist

Additional Information

4. Recognize that you can edit the fields that are not prefilled, that the editable fields are shaded grey, and none of the editable fields require data entry to save the form. The following fields are editable:
 - **Courtesy Worker (Address courtesy worker requests and role if applicable)**
 - All **Additional Information** fields
 - **Relationship to Child**
 - **Compliance (Yes, No or Other) pertaining to Family Plan tasks**
 - **Describe progress this month, including behavioral changes and what is working well.**
 - **Monthly Assessment of Child Safety/Needs**
 - **Current Safety Plan and Expiration Date**
 - **Next Steps**

CPS MONTHLY EVALUATION/ ASSESSMENT

Case Name: [Redacted]
 Date FPR Stage Opened: 12/20/2018
 Caseworker Name: [Redacted]
 Date of Evaluation: 03/18/2019

COURTESY WORKER (Address courtesy worker requests and role if applicable.)

Editable field

CAREGIVER(S) AND CHILD(REN)

Name	Rel/Int	D.O.B	Last FPR FTF Contact	Person Characteristics	Is this an absent parent? (Yes or No)
[Redacted]	Oldest Victim	01/07/2008	12/28/2018		

Additional Information

Editable field

PARENTAL CHILD SAFETY PLACEMENTS (PC-SP)

Child in PC-SP	Start Date	End Date	PC-SP Caregiver	Relationship to Child
[Redacted]	03/19/2019		[Redacted]	Editable field

Additional Information

CONTACT SUMMARY

No records exist

Additional Information

FAMILY STRENGTHS AND NEEDS ASSESSMENT (FSNA)

No records exist

FAMILY PLAN REQUIRED ACTIONS

Family Plan - Family Plan
Date Approved: 12/31/2018

PARTICIPANT NAME: [Redacted]

Required Action

Target Date/ Completed:	Priority/Status:	Compliance (Yes, No or Other):	Editable field
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Additional Information

PARTICIPANT NAME: [Redacted]

Required Action

Target Date/ Completed:	Priority/Status:	Compliance (Yes, No or Other):	Editable field
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Additional Information

PARTICIPANT NAME: [Redacted]

Required Action

Target Date/ Completed:	Priority/Status:	Compliance (Yes, No or Other):	Editable field
-------------------------	------------------	--------------------------------	----------------

Additional Information

Describe progress this month, including behavioral changes and what is working well.

Editable field

MONTHLY ASSESSMENT OF CHILD SAFETY/NEEDS

Editable field

CURRENT SAFETY PLAN AND EXPIRATION DATE

Editable field

SAFETY ASSESSMENT

No records exist

RISK ASSESSMENT/ REASSESSMENT

No records exist

NEXT STEPS

Editable field

5. Select the **Save** icon in the form toolbar.

CPS MONTHLY EVALUATION/ ASSESSMENT

Case Name: [Redacted]
 Date FPR Stage Opened: 08/21/2018
 Caseworker Name: [Redacted]
 Date of Evaluation: 02/03/2019

COURTESY WORKER (Address courtesy worker requests and role if applicable.)

Data for editable field

CAREGIVER(S) AND CHILD(REN)

Name	Rel/Int	D.O.B	Last FPR FTF Contact	Person Characteristics	Is this an absent parent? (Yes or No)
[Redacted]	Oldest Victim	11/26/2007	10/12/2018		
[Redacted]	Parent	09/20/1989	08/30/2018		

Additional Information

Data for editable field

6. Close the form.

7. Navigate to the **Contact Detail** page and select the **Save and Submit** button.

8. Re-open the **CPS Monthly Evaluation/Assessment** form by selecting the Narrative button.

9. Recognize that the editable fields on the form are locked and can no longer be edited.

CPS MONTHLY EVALUATION/ ASSESSMENT

Case Name: _____
 Date FPR Stage Opened: 12/20/2018
 Caseworker Name: _____
 Date of Evaluation: 03/18/2019

COURTESY WORKER (Address courtesy worker requests and role if applicable.)
 Editable field

CAREGIVER(S) AND CHILD(REN)

Name	Rel/Int	D.O.B	Last FPR FF Contact	Person Characteristics	Is this an absent parent? (Yes or No)
_____	Oldest Victim	01/07/2008	12/28/2018		

Additional Information
 Editable field

PARENTAL CHILD SAFETY PLACEMENTS (PCSP)

Child in PCSP	Start Date	End Date	PCSP Caregiver	Relationship to Child Editable field
	03/18/2019			

Additional Information

CONTACT SUMMARY
 No records exist
 Additional Information

FAMILY STRENGTHS AND NEEDS ASSESSMENT (FSNA)
 No records exist

FAMILY PLAN REQUIRED ACTIONS
 Family Plan - Family Plan
 Date Approved: 12/31/2018

PARTICIPANT NAME: _____
 Required Action

Target Date/ Completed:	Priority/Status:	Compliance (Yes, No or Other):	Editable field
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Additional Information

PARTICIPANT NAME: _____
 Required Action

Target Date/ Completed:	Priority/Status:	Compliance (Yes, No or Other):	Editable field
-------------------------	------------------	--------------------------------	----------------

Additional Information

PARTICIPANT NAME: _____
 Required Action

Target Date/ Completed:	Priority/Status:	Compliance (Yes, No or Other):	Editable field
-------------------------	------------------	--------------------------------	----------------

Additional Information

Describe progress this month, including behavioral changes and what is working well.
 Editable field

MONTHLY ASSESSMENT OF CHILD SAFETY/NEEDS
 Editable field

CURRENT SAFETY PLAN AND EXPIRATION DATE
 Editable field

SAFETY ASSESSMENT
 No records exist

RISK ASSESSMENT/ REASSESSMENT
 No records exist

NEXT STEPS
 Editable field

10. Recognize that the prefilled fields of the **CPS Monthly Evaluation/Assessment** continue to refresh with data up until the last day of the evaluation month or until supervisor approval, whichever is earlier.

11. Recognize that the redesigned **CPS Monthly Evaluation/Assessment** form applies only to post-Release 2.0 narratives and that narratives saved prior to Release 2.0 still display the Legacy format.

Contact Search List Page

The radio button for "Monthly Evaluation" under the **Contact Type** column will be disabled so that the **New Using** button can no longer be used with this option. This change applies only to the **FPR** stage.

Contact Search List Page – Updates

1. Select the **Contact Search/List** tab.
2. You will arrive at the **Contact Search/List** page.
3. Recognize that in **FPR** stage the radio button for "Monthly Evaluation" is disabled and is not an option for the **New Using** functionality.

4. Recognize that the radio button is disabled for all Monthly Evaluations, even if saved or submitted prior to Release 2.0.

Case Summary
Review Investigation
Conservatorship Removal
Person
Contacts/Summaries
Service Authorization
Legal
SDM Assessments
Family Plans
Medical
Case Management

Contact Search/List Contact Detail

Contact Search List

conditionally required field

Contact Search

Show 10 entries

	Date	Contact Type	Name	Purpose	Stage	Narr
<input type="radio"/>	02/03/2019	Monthly Evaluation			FPR	✓
<input type="radio"/>	02/03/2019	Monthly Evaluation			FPR	✓
<input type="radio"/>	02/03/2019	Monthly Evaluation			FPR	✓
<input type="radio"/>	01/14/2019	Preliminary Kin Home Assmt		Initial	FPR	
<input type="radio"/>	12/20/2018	Monthly Evaluation			FPR	✓
<input type="radio"/>	12/20/2018	Monthly Evaluation			FPR	✓

Showing 1 to 10 of 43 entries

Page 1 of 5

New Using Add