Perm Plan Enhancement Phase I FAQ

Area	Issue	Comments
Assessments	Will these changes replace the FFA?	The FFA will not be replaced in Phase 1. It will still be required. We are in the process of starting a pilot to address whether the FFA will continue to exist.
Assessments	Do assessments have to be entered within the specific person's overview page or can these be entered through the child's page, even if the assessment is not specific to them as an action	They will have to be added from that person's home page.
Association	What if the person relationship has 2 types- foster parent/maternal aunt; is the first choice foster parent	If the person is associated to another person in more than one way, then the user would enter a new association for each one. The system will allow you to add more than one association between the same two people as long as the association itself isn't the same.
Associations	What is the significance of the begin and end date in relationships?	All associations now have begin and end dates so the user can specify when an association began and when it is no longer valid. For example, a school teacher is only associated with a child for the length of time that child is in his/her class. Once the child has moved on, then that teacher really isn't associated with the child anymore. Another example would be when the parental rights of a birth mother have been terminated. When that happens, her association to the child no longer exists. With Phase 1, the user will be able to end that birth mother relationship using an end date that matches with when parental rights were terminated.
Calendar	Will the calendar send notifications when a meeting is upcoming or something is due in an action step through either TFACTS or outlook?	For Phase 1, the Calendar on the Person Home Page is displayed as a visual cue to what's coming in a future phase. Eventually, the system will be able to identify a person's appointments, meetings, court dates, etc. It is possible to send notifications if necessary, but that type of functionality will be designed when we get to that phase of the project.

Case Conference Notes	Case Conference Notes are missing; can't find case conference notes.	All Case Conference types, except ASFA reviews, are now going to be recorded as Consultations. This is accessed under the Quick Actions list on the new Person Home page. To view existing notes, go to the 'Electronic Case File' just below the Quick Action field. Click the 'more' link. Then in the Event Types field on the search criteria page, select Consultations, and then click Search. That will bring back all Consultations (case conferences) that exist for that person.
CFTM	Can't hold another CFTM until one is approved.	We currently have business rules that state a person cannot have more than one CFTM "in progress" at the same time. The rational for this is that the person can only be at one CFTM at a time. Now you can have multiple CFTMs scheduled for a person at a time, but the person can only be at one meeting. This was a decision made by the Product Owners to help get the information into the system in a timely fashion. The Product Owners confirmed this rule on 5/12/2016. If this is still incorrect, then this needs to be discussed further with the Product Owners to see if the rules need to be changed
CFTM	Only roles are child concerning and facilitator (not sure if this was intended).	Yes, it was. Everything else is considered an association. Phase 1 introduced two somewhat new definitions--role and association. A Role is something between a person and an activity. For example, the role of Child Concerning pertains to the child (person) on the CFTM (activity). An Association is something between a person and another person. For example, the association of a birth mother (person) to her son (person). Once you understand that difference, everything else becomes an association which leaves only Child Concerning and Facilitator as the only two roles that make sense for a CFTM
CFTM	Will any in progress CFTM's or case recordings be lost in the transfer to the new build?	No. We will be converting all CFTMs and Collateral Contact Case Recordings over to the new structure regardless of if they are completed or not.
CFTM	Will the NOA generate from the CFTM record?	Actually, it will generate from the Recommendation Action Step associated to a CFTM after that CFTM has been approved.

CFTM	If there is more than one CFTM scheduled will you be able to select which one you want to cancel or will the system just know?	If there is more than one schedule CFTM, then the system will ask the user to choose which scheduled CFTM should be cancelled.
CFTM	Will Team Leader be notified when a CFTM needs to be approved?	Since the new CFTM will be using the standard approval process in TFACTS, those CFTMs will appear on the team leader's Approval tab page as pending approval and awaiting their response. This is the same functionality for all other items in TFACTS that is waiting for a user to approve the item.
CFTM	Can anyone make changes to a scheduled CFTM if there are errors found in it?	If the CFTM schedule is in a draft status, then anyone with FSW in CM47 can make any changes to the schedule. Once the CFTM status becomes “Scheduled”, then no one can make changes; however, you do still have options to Reschedule or Cancel the CFTM.
CFTM	Will the child attending the CFTM still be used as a face to face contact credit by populating to the case recordings?	Yes. While it's not necessary for the CFTM to be a Case Recording anymore, the system will temporarily continue to create a Case Recording for the CFTM until the new Contact module is built in a future phase.
CFTM	Will the SME box be available in the new CFTM quick actions for the children who attend?	Not directly. The SME flag is a part of a Strength or Need. It is set the first time the Strength or Need is discussed, and then doesn't have to be set again throughout the progress of that Strength or Need. The system will be smart enough to take that information and make the correct determination as it pertains to TCM.
CFTM	Does any of the entered information in the perm plan/CFTM populate to the FFA or FAST?	No
CFTM	Will you be able to link NCFPP with the strength / needs with the CFTM?	The Strengths, Needs and Action Steps defined in any of the source activities (i.e., CFTM, Collateral Contact, Consultation, External Assessment and IPA) will be available anywhere in the system (including for use on a Permanency Plan).

CFTM	You entered the CFTM under the child. Will we be able to see the CFTM in other persons within the case?	Yes
CFTM	Will the family story be expected to be entered in every CFTM; even progress reviews and meetings where the family story isn't necessarily reviewed? Or will family story be where we put meeting summary?	The Family Story is available on all CFTMs, but that doesn't mean it has to be entered on all of them. Basically, if you discussed/reviewed the Family Story within a particular CFTM, then you would enter it. However, if you didn't discuss/review the Family Story, then you would not enter it for that CFTM. The vast majority of what gets entered into the meeting summary currently will actually be entered on those Strengths, Needs and Action Steps that are being discussed.
CFTM	Will scheduling a CFTM generate a notification letter that can be sent to invitees?	Sometime in the future, yes; but it will not be part of Phase 1.
CFTM	Are Approved CFTM’s still supposed to generate a Case Recording?	The system should automatically generate a Case Recording for an approved CFTM. However, I would need to see an example before declaring it a defect at this point. The reason for this is because a CFTM in the new structure is not tied to a case anymore. However, a Case Recording is. That means the system must make a determination as to which case to use in order to create the Case Recording. It could be in your instance that the Case Recording was created, but not in the case that you thought it should be in. (Again, more complications with trying to deal with the case concept just like with assignments.)

Collateral Contact	If the collateral contact is face to face with an educational specialist, child concerning is the person discussed in the collateral contact, but the child did not attend the collateral contact (F2F), the system should have a way to show this	We have been told that a Collateral Contact is a contact that occurs with someone other than the child or the parent. If the contact was with the child or the parent, then a Case Recording would be entered. Therefore, there is no need to identify that the child was not there because the focus of a Collateral Contact would never be with the child in the first place.
Collateral Contact	Will collateral contacts entered through quick action remove the need to enter a redundant case recording for that same contact?	Yes. The Collateral Contact option in Case Recordings will be removed in Phase 1. All Collateral Contacts will be entered using the new Collateral Contact module.
Collateral Contact	Will the collateral contact populate into case recordings?	No
Collateral Contact	Where will the contact be recorded if you see both the child and his teacher in the same visit?	This should be no different than current practice. The F2F would be the most critical. You can still document the contact with the teacher in the F2F or create a separate collateral contact. The actual note would be for the F2F with the child though noting the child was met with alone and separate. A narrative could then be entered to indicate the FSW met with the teacher and identify what was discussed. Collateral Contacts will not be counted for data so there is no "credit" associated with the collateral contact.
Electronic Case File	After schedule a CFTM, the scheduled CFTM date is not showing up on the electronic case file, instead it showed the date that the information was entered	The Electronic Case File is supposed to show events as they occur. Therefore, displaying a date in the future (like the scheduled date for a CFTM) does not follow the purpose of the Electronic Case File. Instead, the system uses the date the user actually scheduled the CFTM. That way you can see that a CFTM was actually scheduled yesterday for two weeks into the future.

Electronic Case File	After save the need the need record showed up on electronic case file, the user select the need, the need is not showing up on ECF a. The system should allow the user to update the need when they select a pending need from electronic case file	A Strength or Need can only be updated through some activity that occurred. In Phase 1, those activities include External Assessments, CFTMs, Collateral Contacts, Consultations and IPAs. This is because all discussions around a Strength or Need occur because of some activity the case manager is involved in. A Strength or Need can never be updated directly from the Electronic Case File. (However, with the appropriate security, you can update one of the activities from the Electronic Case File.)
Electronic Case File	What will the family story look like or come from when selected in the electronic case file?	The Family Story will be a historical list of how the family story has changed over time. Each CFTM will provide an opportunity for the Family Story to be updated. Each update will be dated and included as part of the family story history for that person(s). When entered, the Family Story pertains to all children concerning as well as any persons related to those children on that CFTM.
Electronic Case File	Will you be able to see all TFACTS History (CPS) from the Quick Link?	Quick Links have nothing to do with history--they are used to allow the user to quickly perform an action that "makes sense" for that particular person. The Electronic Case File is where you would see all the history for a particular person. However, since this is just Phase 1, that history will not be complete. As more phases are completed, the history in the Electronic Case File will grow until it finally encompasses all of TFACTS.
Electronic case File	Will this identify any thing we have "In Progress" in the electronic case file?	The Electronic Case File will show everything whether it's already been closed or it's in the process of being worked.
External Assessment	Can I enter multiple persons on an external assessment (like for a Bonding Assessment or a Therapeutic Visitation Assessment)?	For Phase 1, all External Assessments will be based on a single person. We can look at how the system should handle external assessments that involve multiple persons at the same time sometime in the future after Phase 1 is deployed.

External Assessments	Can we select more than one assessment type?	No. Each External Assessment must be for one and only one type. If you have multiple types, then a separate External Assessment would need to be entered for each type.
External Assessments	Would you enter drug screens results under this tab, or is there another place for that?	A drug screening would be entered as an Other Action Step against a need that already identified a drug issue. When the drug screen is done, the results would be entered as a review of that action step.
External Assessment	Can the size of the narrative box for Conducted By on the External Assessment Source be increased? The entire name of some businesses is too large to be entered/ displayed completely.	We can look at it and see if the size can be increased.
General	Once marked complete, can you upload a document?	You will still be able to upload documents at any time just like you are able to do now.
General	Is there a limit on the number of characters for description or outcome text boxes?	The Description and Desired Outcome fields that can be found on a Strength, Need and/or Action Step will allow up to 4000 characters to be entered. Since each Strength, Need and Action Step is specifically addressing only 1 thing, 4000 characters should be more than enough.
General	When will be expected to implement this, i.e., for IPAs??	Right now, deployment will probably occur in June.
General	Will this eliminate the need for the TCM case service requests?	Sometime in the future, yes; but you will still need to add the TCM case services.
General	When closing a case, will alerts/prompts occur to say "close such and such?	The new features in Phase 1 are not case specific. They exist anywhere in the system regardless of the case. As a result, there are no business rules currently that require that information to be ended before a case closes.

General	Will the IPA/CFTM information populate to a form that can be generated, electronically signed and printed for the family?	Sometime in the future, yes; but it will not be part of Phase 1.
General	For families that have long history with the department will this have any effect on cases that rolled over from TNkids?	The Family Story feature will start on the day of deployment and move forward. There is no way to convert any of the pre-existing data because it's buried within existing narratives that talk about things other than just the Family Story.
General	Will the strength and needs populate to the CFTM and the FFA record?	It will populate into any of the 5 new planning activities: CFTM, External Assessment, Collateral Contact, Consultation and IPA. It will not populate into the FFA. The Strength/Need must be in progress and the event record either approved or completed.
General	Since GFE's will no longer be entered in case recording, how will this affect CPS getting credit for attempting to meet response?	The Product Owner has decided that Good Faith Efforts will continue to be added through Case Recordings just as they are now.
General	Adding associated persons-Is this replacing the way we currently do it?	Yes. By adding associations using the new module, they will be available to everyone anywhere in the system. The old way only made them available to that case. If you needed it on another case, then you had to re-enter it again on that other case which is a duplication of effort.
General	How many phases?	Right now, we know of at least 4 different phases for the Permanency Plan enhancement; however, that could change as we get farther along.
General	Will you lose the information if the system freezes while in the process of putting information into the system or updating?	We have implemented the 'auto-save' feature for all the new areas in Phase 1. That means as you enter data and move around, the system is automatically saving the information for you. While I can't say you wouldn't lose anything if there was a power failure, the amount that could be lost will be greatly reduced.

IPA	Is it possible to complete this IPA without the case being assigned to a team?	Yes. As long as the people are established, you can add the IPA directly from the ACV's Person Home Page.
IPA	Will the IPA be able to be signed electronically?	Sometime in the future, yes; but it will not be part of Phase 1.
IPA	What happens when you are in the field and completing an IPA and the case has not been established? When you have gotten a new referral and you need to put an IPA in place.	For Phase 1, the people will have to be established first before the IPA could be entered. However, as part of the CPS Workflow enhancement, the user will be able to enter an IPA without having to establish the people first.
IPA	Can the IPA be printed?	Sometime in the future, yes; but it will not be part of Phase 1.
Need	After I updated the progress on a need record it is displaying the update instead of the actual description of the need record. Why?	The system is designed to always show the Need as it has progressed over time. That means once I've reviewed a Need and entered what the Need looks like now, the system will use that description moving forward of what the Need is. However, that doesn't mean you have lost what the original Need was. The system will provide a way to see the Need as it has progressed up to that point which means you will be able to see the original Need plus any progress reviews for that Need up to what the Need currently looks like now. The purpose for this is so anyone can go back and see how the need evolved over time based on how well the Action Steps were working (or not working).
Need	If end date is connected to a need, does the related service end as well?	For Phase 1, no. However, in a future phase, there will be tighter integration between the results of an action step review and the actual service it refers to.

Need	Concern about adding needs to a perm plan without action steps.	The system will allow a Need to be added without an Action Step. A good example of this would be a Collateral Contact that identified a Need, but the discussion about how that Need should be addressed occurs at a CFTM a few days later. By not requiring an Action Step, the user can document the Need immediately and then address the Action Step(s) at a later time. Now that doesn't mean a Need without an Action Step should be included on a Permanency Plan. The user will have to make the decision as to what Needs should be on the plan and which should not. This may need to be a training issue
Needs/Action Steps	Must all Needs/Action Steps that display in a Source Activity be Reviewed in order to mark the Source activity record completed?	No, users can update/review only those Needs/Action Steps that were discussed during a particular Source Activity. Review of all Needs/Actions steps is not required.
NOA	How will someone know if a NOA is given to someone?	The CFTM now has a new field called 'NOA Given' which will identify if a copy of the NOA was given to that person or not. Based on our design meetings with the users, we were told that if an NOA is necessary, then they will provide a paper copy of that NOA to each of the people who attended the CFTM (if appropriate). Also, there are other people who must also receive a copy of that NOA even if they weren't present at the CFTM. The system now tracks that as well and allows Connie Murphy's group to identify when they were able to get those people a copy of the NOA as well.
Permanency Goal	Will Active Permanency Goals entered prior to the enhancement come over into new Source actions created?	The new structure doesn’t associate anything to a case, so the conversion process “stitched” all permanency goals for a child across multiple cases all into one continuous permanency episode. That means when you view the history for that permanency goal, you will see the entire history of how that child’s permanency goal changed over time (and across cases) in one place.

Permanency Goal	Can users still enter Permanency Plan Goals in the link in the left hand blue navigation area?	No, that link will be disabled and the Permanency Goal must be entered as part of a CFTM Source activity.
Permanency Goal	Why are users able to select more than one Non-Custodial Permanency Plan Goal? We cannot currently do that in Production.	Per the Business Rules, these are the only ones identified that cannot be entered in conjunction with a second goal: If the Child Concerning is less than 18 years old at the time of the Begin Date, then the following Permanency Goals cannot be selected in combination with any other goal: * Child Needs an Alternative Placement (Non-Custody) * Child Remain With Caretaker/Guardian (Non-Custody) * Child Remain with Parent (Non-Custody)
Person Roles	What is the difference between a Concerned person, a Responsible person, and an Authorizing person?	A **concerned person** is the person that source object is about and exists on a Strength, Need or any of the source activities. A **responsible person** exists on any of the Action Step types. It's the person that is responsible for making sure the action step is done. An **authorizing person** is only valid on a Restriction Action Step. It's the person that authorized the restriction to take place. (This can be the same person that was restricted.)
Quick Action	When persons are added through the person association quick action, do they populate to the case member tab in the family case	No. The new Person Association module is a system-wide module that can be used anywhere. As a result, it is not populated to any of the cases that person may be involved with.
Quick Action	Do the quick actions populate to case recordings?	No. However, because these changes are being made in a phased approach, the system will be creating a Case Recording for a CFTM in order to allow the existing TCM functionality to continue to work. However, once the new Contact module is built in a future phase, this dependency will be removed.

Reports	Will the strengths/needs/action step be populated into the quarterly reports?	That is the plan, but it will not occur in Phase 1. It will be included in one of the future phases of the Permanency Plan enhancement.
Schedule CFTM	A CFTM is scheduled but when it is clicked the Select button is not enabled in order to be able to Hold that CFTM.	The reason this occurs is there is another CFTM that is In Progress status. Per the Business Rules there can only be one CFTM In Progress at a time. Once that one is in Approved status an addition CFTM may be created.
Strength/Needs	When you search for needs, can you print a report that lists them?	Sometime in the future, yes; but it will not be part of Phase 1.
Strengths/Needs	Can Strengths/Needs added as part of a Quick Action be included on the Perm Plan	Strengths/Needs that are in an In Progress status and that are part of a Completed or Approved Source Activity can be selected to be added to a Permanency Plan
Strengths/Needs	Will Strengths/Concerns that were entered prior to this enhancement come over into Source actions created after this goes into production?	All Strengths, Concerns & Action Steps will be converted into the new structure for Perm Plan Phase 1. However, they will not be associated with any source activities because the old structure has no way of associating Strengths & Needs to source activities. Therefore, they will show up as active Strengths & Needs on a new source activity and, if touched, will be associated to that source activity; but if you view the history of a converted Strength or Need, there will not be any hyperlinks identifying what the source activity was for anything that occurred before the deployment of Perm Plan Phase 1.
Strengths/Needs	Could a filter for Status be added to the Strengths/Needs filter? An error message is generated if all items reviewed/added are not In Progress or Completed when they attempt to Save or submit the Source Activity for Approval, but it's time consuming to click thru all the records to find the one that is not in Completed/In Progress status.	A modification was made to identify which Strengths, Needs and/or Action Steps were "(changed)" in order to help quickly identify the ones that were discussed for that source activity. That should limit the possible places a user would have to look. Anything more than that would have to be looked at and implemented (if necessary) after Phase 1.