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**ORANGE COUNTY SOCIAL SERVICES AGENCY  
CFS OPERATIONS MANUAL**

**Effective Date:** November 16, 2011

**Number:** B-0216

## **Standard Operating Procedures**

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<b>Purpose</b>	To provide guidelines for standard operating procedures within the work environment.
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<b>Approved</b>	This policy was approved by Gary Taylor, Director of CFS, on November 16, 2011. <i>Signature on file.</i>
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<b>Most Recent Revision</b>	New.
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<b>Background</b>	<p>Children and Family Services (CFS) strives to create a positive service-oriented culture in order to join with families and the community to ensure that children and young adults (i.e., non-minor dependents) live in safe, nurturing, and permanent homes.</p> <p>In order to meet this goal, all employees of CFS are expected to demonstrate a high level of professionalism, skill, and customer service.</p> <p>This policy incorporates pertinent information from and renders obsolete CFS Policy and Procedure (P&amp;P) Client Files—Removal from Office (E-0103).</p>
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<b>Legal Mandates</b>	None.
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<b>Definitions</b>	None.
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# POLICY

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## General Guideline

CFS employees will perform their work and conduct themselves in a professional manner at all times. Refer to Social Services Agency (SSA) Administrative Policy and Procedure (P&P) [Rules of Conduct \(C 32\)](#) for more extensive guidelines.

**Note:** Orangewood Children and Family Center (OCFC) has additional expectations and policies for staff working at that location. CFS staff assigned to OCFC will also adhere to all applicable OCFC policies outlined in the OCFC Operation Manual.

The following expectations apply to all CFS staff:

## Electronic Mail (Email)

In an effort to ensure prompt transmission of information and action as necessary, on scheduled work days, staff will check email at least twice (i.e., once during first half of shift and once during second half of shift) during scheduled work hours.

When unavailable to answer or check emails, staff will utilize the Microsoft Outlook “Out-of-Office Assistant” feature. The out-of-office message will at a minimum indicate:

- Date/time of return or availability
- Back-up contact person with phone number
- Other information as required by program

**Note:** Out-of-office messages may be received by individuals outside the County network. For individual privacy and security, specifics to an employee being away from home (e.g., on vacation out of town, state, or country) should be avoided.

Staff will ensure prompt action, as necessary, on all emails that indicate an emergent concern or need for timely response.

### **Email correspondence with parents and community:**

When communicating with parents and community partners (e.g., caregivers, service providers, appointed attorneys, etc.) by email, CFS staff will:

- A. Protect any email exchange that includes confidential referral/case information or Personally Identifiable Information (PII) by encryption or, if applicable, use of Secure Communication Management System (SCMS). For further direction on protecting email, refer to:

- SSA Administrative P&P [Use of E-mail, Personal Computer, and other Computer Resources \(I 6\)](#)
  - “Safeguarding Electronic Information” Policy section within CFS P&P [Confidentiality—CFS Records \(F-0105\)](#)
- B. Write content that is professional, clear, and easy to understand.
- C. Send required notifications (e.g., court hearings, grievance hearings, relative information letters, etc.) through United States Postal Service (USPS), rather than by email.

**Note:** Use of email does not substitute for mandated in-person contacts.

### Voice Mail

An outgoing greeting will be utilized on voice mail or telephone answering machines at a frequency designated by program (e.g., daily, weekly, etc.). Certified bilingual staff will translate outgoing greetings in their secondary language, as well as in English. Outgoing greetings will at a minimum include:

- Employee name, title, and program
- Work schedule/time frame of absence or unavailability
- Emergency contact with accurate phone number, if caller needs immediate response
- Other information as required by program

On scheduled work days, staff will check voice mail at least twice (i.e., once during first half of shift and once during second half of shift) during scheduled work hours.

Staff will take prompt action, as necessary, on messages received. Voice mails requiring follow-up action will be returned no later than the same or next business day following receipt of a message. For voice mails indicating an emergent concern, staff will respond immediately.

Staff will erase messages after completing all necessary actions, with the exception of any messages identified by a Program Manager (PM) as relevant to pending or anticipated litigation, personnel investigation, or other legal processes (voice mail in-boxes have a maximum capacity of 40 minutes).

**Note:** If a message is threatening, do not erase. Promptly notify immediate supervisor and follow steps listed under “Response to Threats” Policy section of CFS P&P [Staff Safety and Responses to Threats \(B-0213\)](#).

**Microsoft Outlook Calendar/Field Itineraries**

The purpose for documenting an employee’s whereabouts during work hours is to aid in ensuring employee safety, to assist in locating staff in the event of a work related or personal family emergency, and account for time away from the office.

When away from the office for agency business, staff will document whereabouts by utilizing the Calendar function in Microsoft Outlook Calendar or completing *Orange County Social Service Agency Field Itinerary (F063-25-72)*, per preference of direct supervisor or PM.

The following information will be included in either Microsoft Outlook Calendar entries or field itineraries:

- Destination (i.e., case name, school, hospital, agency, etc.)
- Location (address and, if available, 10-digit phone number)
- Estimated time of arrival/return (i.e., time or, if returning on a different day, date of expected return to the office)

**Note:** Outlook Calendar requires “permissions” be granted for others to view calendar entries. If Microsoft Outlook is used, staff will ensure direct supervisor and unit clerk or other designee identified by direct supervisor or PM have “Reviewer” permission to access calendar, if necessary.

**Officer of the Day**

Officer of the Day (OD) coverage begins at 8:00 a.m. and ends at 5:00 p.m., Monday through Friday for applicable program units. Programs may utilize two half-day shifts to implement full day coverage.

OD shift schedules will be submitted to Eckhoff reception by applicable program units on a monthly basis.

- If an employee knows in advance they will be unable to meet a scheduled OD shift, the employee will find a replacement and notify direct supervisor and reception of the change
- If an employee is ill or unexpectedly unavailable the day of a scheduled OD shift, the employee will notify direct supervisor, as soon as possible, so a substitute may be selected and reception notified

CFS operations in locations other than Eckhoff will notify the relevant building's reception about OD coverage or develop comparable notification arrangements for their operation, as instructed by direct supervisor or PM.

ODs will apprise staff or the staff's supervisor of any case matters handled on their behalf during an OD shift per established program protocols.

**Collect Calls**

Staff will accept collect calls from CFS clients when deemed necessary.

**Pagers**

Employees with an assigned pager will ensure that their assigned pager is in working condition, turned on, and within their possession during work hours. Staff will return pages as soon as practically possible or within a timeframe designated by their direct supervisor or PM.

**Exception:** Staff will respond immediately, yet no later than 15 minutes, to a page from court personnel (e.g., County Counsel, Court Officers, etc.).

**Unexpected Absence**

If late or absent, staff will notify direct supervisor or designee, as identified by supervisor or PM, within one hour of scheduled starting time. Staff will be responsible for ensuring all scheduled appointments with clients, service providers, or other work-related persons are notified of the delay, inability to meet, or need to reschedule.

**Computer Resources**

The use of county computer equipment is primarily intended for official county business. For detailed information on technology usage expectations, refer to SSA Administrative P&P [Use of Email, PCs, and other Computer Resources \(I 6\)](#).

**Business Online Social Media Usage**

Work-related online social media use is limited to:

- Select county-approved websites as outlined in County Executive Office (CEO) Information Technology P&P [County Approved Social Media Networks and Standards](#)
- Employees with a clear business purpose (e.g., family finding efforts, parent searches, recruitment of resource families, description of programs and services, etc.)
- Employees with PM permission

Employees approved to publish on SSA websites or access social networking websites will represent SSA in a professional manner and will adhere to the same standards, guidelines, and expectations that apply in the performance of their assigned duties as outlined in SSA Administrative P&P [Rules of Conduct \(C 32\)](#).

Information posted or published on SSA websites by approved employees will be accurate, consistent, and comply with applicable copyright and privacy laws, as well as SSA Administrative P&P [Online Media \(I 2\)](#). In addition, employees will comply with confidentiality protocols as outlined in the “Protecting Confidentiality in Use of Social Media” Policy section of CFS P&P [Confidentiality—CFS Client Records \(F-0105\)](#).

For detailed guidelines on the use of social media as a County employee, refer to CEO Information Technology P&P [County Social Media Participation Guidelines](#) and [County Wide Website & Social Media Policies](#).

**Personal Use  
of Online  
Social Media**

Because the Internet is a public venue, staff are encouraged to be prudent in personal use of social media sites (e.g., Facebook, Twitter, Youtube, Flickr, etc.). Use of social media sites could lead to defamation or harassment complaints, and/or litigation.

To assist in the responsible use of personal social networking sites, the following guidelines are presented:

- A. Consider the power of words and images and how they may be viewed, interpreted, and used by others.
  - 1. Internet use leads to a high probability of unintended third party (i.e., client, foster parent, Public Defender, etc.) viewing.
  - 2. Information posted on social media networks may be used to impeach, discredit, or show bias of an employee testifying in a court case.
  - 3. For safety reasons, be mindful of photo postings or data which may lead to identification of employee’s family members, daily routines, or whereabouts.
- B. Be cautious in inviting or accepting others into a social media network (e.g., clients, foster parents, service providers, etc.).

- Despite privacy settings of “friends only,” there is no guarantee a “friend” will not download a picture, reveal information to a “non-friend,” or disseminate data via email or other social media avenues
- C. Posting anonymously or under a pseudonym does not necessarily protect an author’s identity.
1. A subpoena on the user’s Internet Service Provider (ISP), or web hosts may be served and a user’s identity may be revealed.
  2. Defense attorneys have issued subpoenas to Facebook.
- D. Individuals that identify themselves on personal social network sites as an employee with a particular organization, to some extent become a representative of that organization.
1. Personal posts have the potential to reflect on the image of the organization.
  2. If identifying as an Orange County, SSA, or CFS employee, include disclaimers in personal blogs and other personal posts to ensure the views and opinions expressed are solely those of the author and do not represent the views of the County, SSA, or CFS.
  3. Social networking conduct that undermines the County’s, SSA’s, or CFS’ mission, purpose, credibility with public, or violates organization policies is prohibited.

**Cellular  
Telephones**

Employees assigned a county-issued cellular phone will ensure the telephone is in working condition, turned on, and within their possession during work hours and will limit usage to county business. Staff working in the field may use county-issued cellular phones for personal emergencies when necessary.

Staff will check county-issued cellular phones for voice messages on a regular basis during scheduled work hours and will return calls as soon as practically possible or within a timeframe designated by their direct supervisor or PM.

**Exception:** Staff will respond immediately yet no later than fifteen minutes to a call from court personnel (e.g., County Counsel, Court Officers, etc.).

For more information on the usage of county-issued cellular phones, refer to CFS P&P [Cell Phones and Blackberries \(B-0202\)](#).

**Lost or Stolen Equipment or Property**

Staff will report incidents of lost or stolen county-issued equipment or property (e.g., cell phones, pagers, laptops, blackberries, etc.) as outlined in SSA Administrative P&P [Loss or Damage of County Funds/Property \(E 1\)](#).

**Removal of Case Files From Office**

In accordance with CFS P&P [Confidentiality—CFS Client Records \(F-0105\)](#), client records will be kept in a secure location at all times. Case files (i.e., Legal File, Service Folder, Adoption Case Record, and Referral packet) will be removed from their designated storage location or office for business purposes only. Examples of business purposes include, yet are not limited to:

- Court hearings
- Task completion by staff other than the assigned social worker (e.g., Adoptions legal workers, eligibility technicians, unit clerks, court typists, etc.)
- Telecommuting (refer to SSA Administrative P&P [Telecommuting \[D 20\]](#))

**Note:** Special restrictions apply to the removal of Adoption Case Records as outlined in CFS P&P [Adoption Case Record Confidentiality \(C-0302\)](#).

When a case file, or portion thereof, is removed from the office, staff will:

- When possible, seek access to the needed file(s) directly with the assigned social worker or supervisor
- Notify the assigned social worker and supervisor by email that the case file, or portion thereof, has been removed
- Return the file no later than the end of the following business day
- Be available to immediately return the file or provide information from it upon request of the assigned social worker, supervisor, or PM

If circumstances prevent return of a case file within one business day, staff removing the file will provide clear written notification in the location in which the file was removed. Notification will include:

- Name and contact information of staff removing file
- Case name and number
- Date of removal
- Date of expected return

**Note:** An “Out” card, found in CFS Closed Files rooms, may be used for this purpose.

Staff that remove case files from the office or storage location will be responsible for maintaining the safety and confidentiality of the client record. Actions to protect confidentiality may include yet are not limited to:

- Remove copies of original documents, when possible
- During transportation, maintain files in a concealed location and locked in vehicle
- At home or other location, maintain file in a secure location ensuring inaccessibility by others

In the event client files removed from the office are lost or stolen, staff will complete a *Special Incident Report (F063-03-48)* as outlined in SSA Administrative P&P [Special Incident Report \(F 13\)](#).

#### **Work Schedule**

Employees will adhere to designated work schedules as listed on program rosters unless prior supervisory approval has been obtained. Staff will request prior supervisory approval by email, whenever possible. Refer to the following P&Ps for more information on work schedules:

- CFS P&P [Flex Schedules \(B-0206\)](#)
- SSA Administrative P&P [Telecommuting \(D 20\)](#)
- SSA Administrative P&P [Authorized Overtime \(C 16\)](#)

#### **Vacations and Time Off Requests**

Staff will obtain prior supervisory approval via completion of *Request for Time Off (F063-02-15)* for vacation and scheduled absence requests. For information on other types of time off, refer to the following SSA Administrative P&Ps:

- [Jury Duty and Witness Leaves \(C 27\)](#)
- [Leaves of Absence \(C 14\)](#)
- [Military Leave of Absence \(C 26\)](#)

<b>Meetings and Trainings</b>	Staff will seek supervisory approval prior to attending activities (e.g., work related trainings, conferences, agency or community meetings, etc.) during or outside their scheduled work hours. SSA Administrative P&P <a href="#">Trip Reports (F 5)</a> provides guidelines for the sharing of information learned at meetings and conferences with colleagues.
	Reimbursement for the completion of some professional activities may be available pursuant to SSA Administrative P&P <a href="#">Educational and Professional Reimbursement (C 22)</a> .
<b>Out-of-County/ Country Travel</b>	Out-of-county travel for day-to-day operations related to routine casework does not require pre-approval. For all other types of out-of-county or overnight travel, staff will seek pre-approval pursuant to SSA Administrative P&P <a href="#">Travel and Reimbursement of Related Expenses (F 10)</a> .
<b>Mileage Reimbursement</b>	Staff utilizing personal vehicles may be reimbursed for mileage accrued while on SSA business, per guidelines established in SSA Administrative P&P <a href="#">Mileage Reimbursement (F 12)</a> .

## REFERENCES

<b>Attachments and CWS/CMS Data Entry Standards</b>	Hyperlinks are provided below to access attachments to this P&P and any CWS/CMS Data Entry Standards that are referenced.
	None.

<b>Hyperlinks</b>	Users accessing this document by computer may create a direct connection to the following references by clicking on them.
	<ul style="list-style-type: none"> <li>• SSA Administrative P&amp;P <a href="#">Rules of Conduct (C 32)</a></li> <li>• SSA Administrative P&amp;P <a href="#">Use of email, PCs, and other Computer Resources (I 6)</a></li> <li>• SSA Administrative P&amp;P <a href="#">Mileage Reimbursement (F 12)</a></li> <li>• SSA Administrative P&amp;P <a href="#">Loss or Damage of County Funds/Property (E 1)</a></li> <li>• SSA Administrative P&amp;P <a href="#">Telecommuting (D 20)</a></li> <li>• SSA Administrative P&amp;P <a href="#">Jury Duty and Witness Leaves (C 27)</a></li> <li>• SSA Administrative P&amp;P <a href="#">Leaves of Absence (C 14)</a></li> <li>• SSA Administrative P&amp;P <a href="#">Military Leave of Absence (C 26)</a></li> <li>• SSA Administrative P&amp;P <a href="#">Authorized Overtime (C 16)</a></li> </ul>

- SSA Administrative P&P [Trip Reports \(F 5\)](#)
- SSA Administrative P&P [Educational and Professional Reimbursement \(C 22\)](#)
- SSA Administrative P&P [Travel and Reimbursement of Related Expenses \(F 10\)](#)
- SSA Administrative P&P [Special Incident Report \(F 13\)](#)
- SSA Administrative P&P [Online Media \(I 2\)](#)
- CEO Information Technology P&P [County Approved Social Media Networks and Standards](#)
- CEO Information Technology P&P [County Social Media Participation Guidelines](#)
- CFS P&P [Staff Safety and Responses to Threats \(B-0213\)](#)
- CFS P&P [Cell Phones and Blackberries \(B-0202\)](#)
- CFS P&P [Flex Schedules \(B-0206\)](#)
- CFS P&P [Confidentiality—CFS Client Records \(F-0105\)](#)
- CFS P&P [Adoption Case Record Confidentiality \(C-0302\)](#)

**Other Sources** Other printed references include the following:

- [County Wide Website & Social Media Policies](#)

## REQUIRED FORMS

**Online Forms** Required forms listed below may be printed out and completed, or completed online, and may be accessed by clicking on the link provided.

Form Name	Form Number
<a href="#">Request for Time Off</a>	F063-02-15
<a href="#">Special Incident Report</a>	F063-03-48

**Hard Copy Forms** Forms listed below must be completed in hard copy (including multi-copy NCR forms). *For reference purposes only*, links are provided to view these hard copy forms, where available.

Form Name	Form Number
<a href="#">Orange County Social Service Agency Field Itinerary</a>	F063-25-72

**CWS/CMS  
Forms**

The following required forms may **only** be obtained in CWS/CMS.  
***For reference purposes only***, links are provided to view these  
CWS/CMS forms, where available.

	<b>Form Name</b>	<b>Form Number</b>
	None.	

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**Brochures**

Brochures to distribute in conjunction with this procedure include:

	<b>Brochure Name</b>	<b>Brochure Number</b>
	None.	