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

Effective Date: November 16, 2011
Revised: July 9, 2020

Number: B-0216

Standard Operating Procedures

Purpose	To provide guidelines for standard operating procedures within the work environment.
Approved	This revised Policy and Procedure was approved by Anne Bloxom, CFS Director. <i>Signature on file.</i>
Most Recent Revision	<p>This revision of the Policy and Procedure (P&P) includes:</p> <ul style="list-style-type: none">• ID Badge/Key Card protocol, cellular telephone usage and loss of county property, including completion of a Special Incident Report• CFS P&P Cell Phones and Blackberries (B-0202) has been renamed County-Issued Cellular Telephones (B-0202)• SSA Administrative P&P Travel and Reimbursement of Related Expenses (F10) has been renamed Business Travel and Meeting Expenses Reimbursement (F10).• Removal of reference to the following obsolete policies:<ul style="list-style-type: none">○ SSA Administrative P&P Use of email, PCs, and other Computer Resources (I 6)○ 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)○ CFS P&P Cell Phones and Blackberries (B-0202)• Reference to new policies is as follows:<ul style="list-style-type: none">○ SSA Administrative P&P Encrypted Photo Identification Key Card Usage (D 18)○ SSA Administrative P&P Information, Technology, Security and Usage (I 6)○ SSA Administrative P&P External Communications

- [and Media Requests \(D 3\)](#)
 - SSA Administrative [P&P Use of County Owned Communication Devices/Equipment \(E-13\)](#)
 - SSA Administrative P&P [Business Travel and Meeting Expenses Manual \(F 10\)](#)
 - CFS P&P [County-Issued Cellular Telephones \(B-0202\)](#)
 - Revision to form [Request For Time Off \(F063-02-15\)](#)
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Background

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.

In order to meet this goal, all employees of CFS are expected to demonstrate a high level of professionalism, skill, and customer service.

Legal Mandates None.

Definitions

For the purposes of this P&P, the following definitions apply:

County-Owned Communication Devices: Cell phones, tablets, desktop telephones, all-in-one machines (copiers, scanners, facsimile), desktop computers, and laptops.

Personal Devices: Cell phones, tablets, and computers.

Personal Accounts: Email, text messages, and social media.

Public Record: Per County Policy No. 0900-6, includes any writing, photograph, sound recording, and/or video on either a public or private device or account that relates in some substantive way to the conduct of the public's business. Communications that are primarily personal, containing no more than incidental mentions of agency business, generally will not constitute public records.

POLICY

General

CFS employees will perform their work and conduct themselves

Guideline

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 Operations Manual.

ID Badge/Key Card

CFS employees shall visibly wear their ID Badge/Key Card while on duty. When CFS employees are performing their duties with other public agencies or in the community, the ID Badge/Key Card may serve as proof of their current status as a CFS employee. For further guidance, refer to SSA Administrative P&P [Encrypted Photo Identification Key Card Usage \(D 18\)](#).

Should a community member/client question a CFS employee's status despite being shown the County ID Badge/Key Card, the employee may:

- Provide the community member/client with the phone number to CFS reception and have reception confirm that the employee is a CFS employee
- If asked for more proof, the CFS employee will request reception to route the community member/client to a supervisor for confirmation.
- If the supervisor is unavailable, the CFS employee will request reception to route the community member/client to the Officer of the Day of their unit.

When entering a public facility, such as a jail or school for the purposes of performing job duties, the CFS employee may be asked to show their County ID Badge/Key Card and any additional identification as requested by the facility.

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, CFS staff will use 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 [Information, Technology, Security and Usage \(I 6\)](#)
- “Safeguarding Electronic Information” Policy section within CFS P&P [Confidentiality—CFS Client 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 composed 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 on a regular basis.

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.

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

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.

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, 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.

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.

County-Owned Computer Resources The use of county computer equipment is intended for official county business.

Staff may access the Internet for limited personal use during nonworking time and in strict compliance with policy. If there is doubt about whether an activity is appropriate, consult with the

Department Head or their designee. For detailed information on technology usage expectations, refer to SSA Administrative P&P [County of Orange Information Technology Security and Usage \(I 6\)](#).

**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, Snapchat, Instagram, 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, resource parent, attorney 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, resource 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. Attorneys can issue a subpoena to a social network site, such as "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. If identifying as an Orange County, SSA, or CFS employee, include disclaimers in personal blogs and other personal posts to make clear that the views and opinions expressed are solely those of the author and do not represent the views of the County, SSA, or CFS.
 2. Social networking conduct that undermines the County's, SSA's, or CFS' mission, purpose or violates organization policies is prohibited.

Media Requests

Employees receiving media inquiries for information and/or statistical data regarding SSA employees, clients, activities

and/or operations, will refer such inquiries, to the SSA Public Information Officer (PIO). For further guidance, refer to SSA Administrative P&P [External Communications and Media Requests \(D 3\)](#).

County-Issued Cellular Telephones

Employees assigned a county-issued cell 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 cell phones to assist with personal emergencies. For additional information on the use of county-issued cell phones for personal use, refer to SSA Administrative P&P [Use of County-Owned Communication Devices/Equipment \(E 13\)](#).

For more information on the usage of county-issued cell phones, refer to CFS P&P [County-Issued Cellular Telephones \(B-0202\)](#).

County-Owned Communication Devices

County-Owned communication devices are provided to CFS staff for conducting official County business. There is no right to privacy for any use of County-Owned communication devices and as such are for the exclusive use of staff while conducting official County business. For more information on County-Owned communication devices, refer to SSA P&P [Use of County-Owned Communication Devices/Equipment \(E 13\)](#).

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 Per SSA policy, if a county-issued cell phone or digital camera is lost, stolen, or damaged, CFS staff will follow instructions for the submission of a *Special Incident Report (SIR) (F063-03-48)*, and other necessary actions, as described in SSA Administrative P&P [Loss or Damage of County Funds/Property \(E 1\)](#).

Personal Devices and Accounts

Staff are prohibited from using personal devices or accounts in the performance of their work for the County, and

- Texting from a personal device is not permitted
- Staff may call using their personal device, and either speak to the person or leave a voice mail

Staff may use private devices and accounts in urgent circumstances to the extent that this does not impermissibly interfere with the performance of the staff's statutory duties. Urgent circumstances include unusual situations when the staff must use a personal device or account to address County/CFS business that, if left unanswered, could seriously impact the

County's operations.

Staff may use a personal computer or laptop remotely to access County accounts, since remote access accounts are stored in the County electronic and communications systems.

If a public record is located on a private device or account, staff must transfer the public record to a County device or account and then delete the original communication from the private device or account.

Failure to comply with policy regarding personal devices and accounts could lead to disciplinary action for staff, up to and including the termination from employment and may result in the staff being personally named as a respondent in a Public Records Act (PRA) lawsuit and compelled by a court to produce the record. For further guidance, refer to [County Policy No.0900-6](#).

Confidentiality

All written and oral information concerning clients of SSA is confidential. Accessing client information for non-work related reasons, posting any client information on social media, or sending client information outside of County approved computer servers and systems is prohibited. For further guidance, refer to [Confidentiality—CFS Client Records \(F-0105\)](#).

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, but 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 case files removed from the office are lost or stolen, staff will complete a Special Incident Report (SIR) (F063-03-48) as outline 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 \(C 26\)](#)

**Meetings and
Trainings**

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.

Reimbursement for the completion of some professional activities may be available pursuant to SSA Administrative P&P [Business Travel and Meeting Expenses Reimbursement \(F 10\)](#) or [Educational and Professional Reimbursement \(C 22\)](#).

**Out-of-County/
Country Travel**

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 [Business Travel and Meeting Expenses Reimbursement \(F 10\)](#).

**Mileage
Reimbursement**

Staff utilizing personal vehicles may be reimbursed for mileage accrued while on SSA business, per guidelines established in SSA Administrative P&P [Mileage Reimbursement \(F 12\)](#).

REFERENCES

**Attachments
and CWS/CMS
Data Entry
Standards**

Hyperlinks are provided below to access attachments to this P&P and any CWS/CMS Data Entry Standards that are referenced.

None.

Hyperlinks

Users accessing this document by computer may create a direct connection to the following references by clicking on them.

- SSA Administrative P&P [Rules of Conduct \(C 32\)](#)
- SSA Administrative P&P [Mileage Reimbursement \(F 12\)](#)
- SSA Administrative P&P [Loss or Damage of County Funds/Property \(E 1\)](#)
- SSA Administrative P&P [Telecommuting \(D 20\)](#)
- SSA Administrative P&P [Jury Duty and Witness Leaves \(C 27\)](#)
- SSA Administrative P&P [Leaves of Absence \(C 14\)](#)
- SSA Administrative P&P [Military Leave of Absence \(C 26\)](#)
- SSA Administrative P&P [Authorized Overtime \(C 16\)](#)
- SSA Administrative P&P [Educational and Professional Reimbursement \(C 22\)](#)
- SSA Administrative P&P [Special Incident Report \(F 13\)](#)
- SSA Administrative P&P [Online Media \(I 2\)](#)
- SSA Administrative P&P [Encrypted Photo Identification Key Card Usage \(D 18\)](#)
- SSA Administrative P&P [Information, Technology, Security and Usage \(I 6\)](#)
- SSA Administrative P&P [External Communications and Media Requests \(D 3\)](#)
- SSA Administrative P&P [Use of County-Owned Communication Devices/Equipment \(E 13\)](#)
- SSA Administrative P&P [Business Travel and Meeting Expenses Manual \(F 10\)](#)
- CFS P&P [County-Issued Cellular Telephones \(B-0202\)](#)
- 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 [Flex Schedules \(B-0206\)](#)
- CFS P&P [Confidentiality—CFS Client Records \(F-0105\)](#)
- CFS P&P [Adoption Case Record Confidentiality \(C-0302\)](#)
- [County Policy No. 0900-6](#)

Other Sources Other printed references include the following:

- [County Wide Website & Social Media Policies](#)
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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
Request for Time Off	F063-02-15
Special Incident Report	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
Orange County Social Service Agency Field Itinerary	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.

Form Name	Form Number
None.	

Brochures

Brochures to distribute in conjunction with this procedure include:

Brochure Name	Brochure Number
None.	