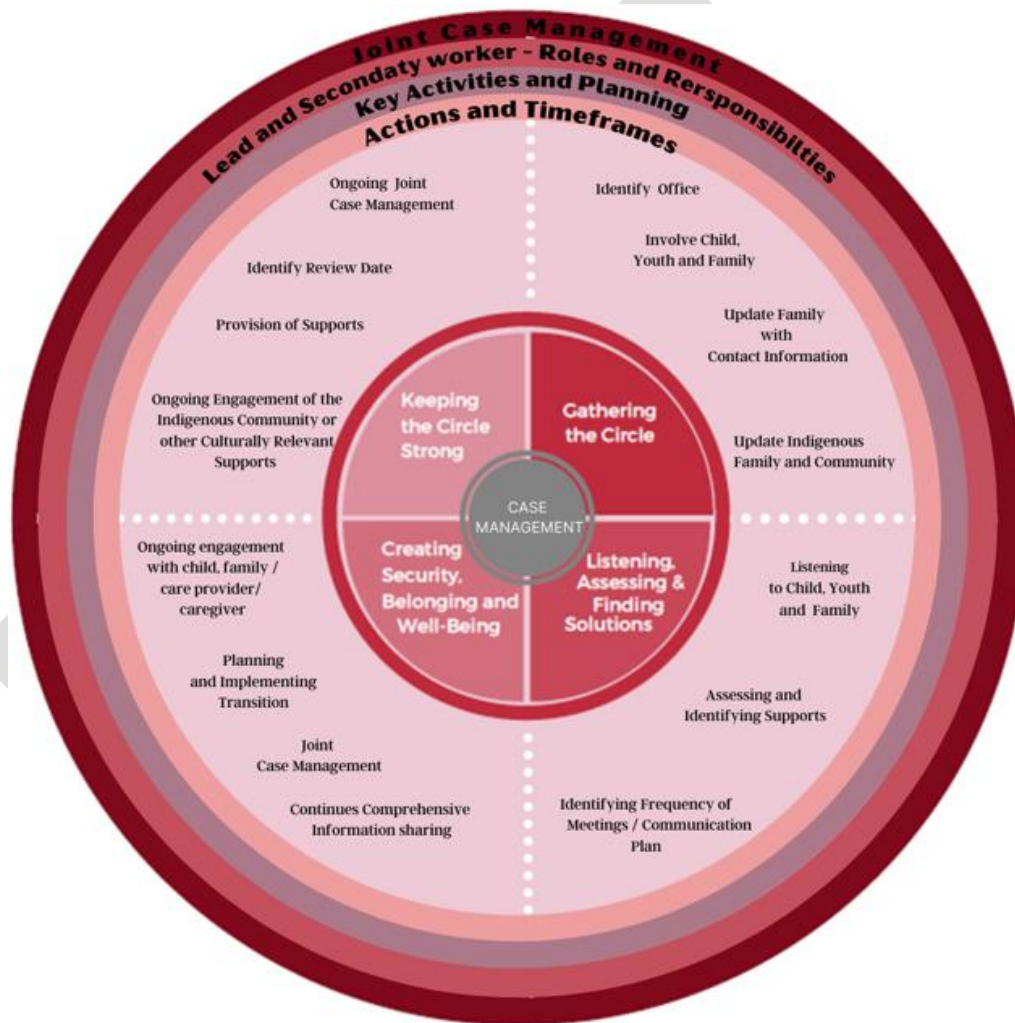


DRAFT FOR REVIEW

Policy Procedures for Joint Child and Family File Management: Key Activities, Roles, and Responsibilities

Supervisors will decide and assign a lead and secondary worker, based on the child best interest. Supervisors will discuss and agree about the roles and responsibilities of the lead and secondary worker to initiate joint file management and document their decisions on ICM (case note). The lead and secondary worker will discuss their specific roles and responsibilities in collaboration with the family and document the information in the form and attach the completed form to ICM record.



"...strengthening RELATIONSHIPS THROUGH SHARING, collaborating AND STRIVING FOR COMMON understanding...". The Circle process ensures the right people are brought together to collectively plan, make decisions, and commit to actions to ensure the well-being of Aboriginal children, youth, families, and communities (*Aboriginal Policy and Practice Framework*)

Joint Child and Family File Management

Roles & Responsibilities of the Lead Worker and the Secondary Worker

Roles and Responsibilities are created in collaboration between the two offices. Using the circle model can be beneficial for this process. The plan for role and responsibilities is created in collaboration, however, documentation of the form is completed by the originating office and shared with the receiving office. A list of key tasks for Joint Child and Family File Management and Child and Family File Transfer can be found below.

Responsibilities of the Lead Worker

- a) Services provided by the lead worker with joint file management responsibility may include, but not be limited to:
 - i) Liaison with the secondary worker to agree upon a plan and respective roles and responsibilities in keeping the child/youth safe and providing supports to the family;
 - ii) Assess and take steps to address the safety of children/youth when necessary. The worker where the child/youth and family is located is responsible for taking actions necessary to keep the child/youth safe. Wherever possible this is done in consultation with the worker sharing joint child and family file management, but the consultation must not delay the provision of these necessary services or action necessary to address the safety concerns;
 - iii) Overall management of the file, including all decisions, supervisory consultations, and file management;
 - iv) Holding the physical file for documentation purposes;
 - v) Planning how regular communication will occur between the two workers;
 - vi) Overall collaboration including involving a child, youth, or family's Indigenous community;
 - vii) Making the family aware of joint child and family file management responsibilities and discussing how best to involve them;
 - viii) Taking the lead to collaboratively develop a family plan, or care plan, which include a review date, roles and responsibilities and the goals and strategies to meet the family's goals. The family plan is attached to ICM; and
 - ix) When the family relocates, remaining involved to the extent necessary to complete a Child Protection Response (CPR) and to ensure seamless transition to service in the new community.
- b) If it is in the best interest of the child/youth, the lead worker's case management responsibilities can be transferred to another case worker, subject to approval by supervisors.

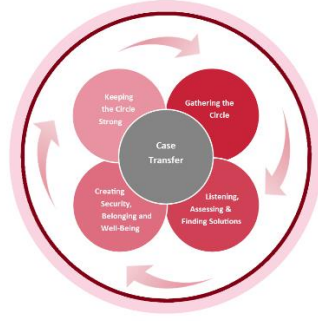
- c) The lead worker retains the physical file and the case on ICM, whereas the secondary worker is listed as a secondary owner of the case on ICM and sends any records generated or received to the office of the lead worker.
- d) If a decision is made based on a child/youth's best interest not to have joint file management, transfer the case to the new Service Area within 15 days. Resolve any disagreements through the [Dispute Resolution](#) process.

Responsibilities of the Secondary Worker

Services provided by the secondary worker may include, but not be limited to:

- Assess and take steps to address the safety of children/youth.
- Provide services to promote continuity of the child/youth's plan.
- Provide the family with information about services available in the community.
- Serve court documents.
- Conduct interviews.
- Conduct home-studies or assess families for out of care options.
- Meet the children/youth, guardians and/or individuals that are being transported by public transportation.
- Supervise contacts or visits between children/youth and family members.
- Send records generated or received to the office of the lead worker.
- Provide other services as agreed to by the workers involved in joint file management responsibility.

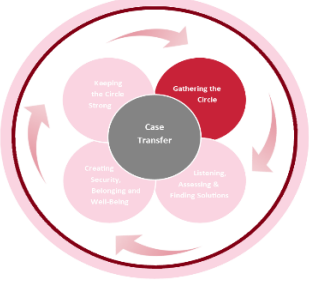
Joint Child and Family File Management requested date:	Joint Child and Family File Management accepted date:
Lead worker's name and office code: Team Leader: Director of Operations:	Secondary worker's name and office code: Team Leader: Director of Operations:



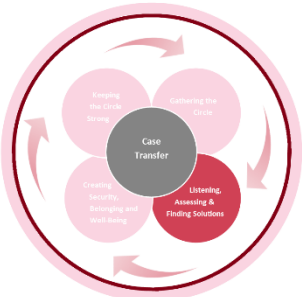
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Gathering the Circle: Involve family/Identify which office

Once supervisor confirms child and family file transfer and roles of Lead and Secondary workers, originating worker contacts worker in receiving office and fully debriefs

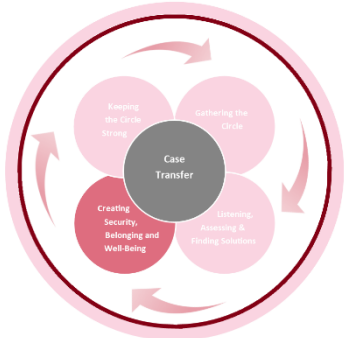
Key Activities 	PLAN	ACTION	Identify Worker L = LEAD S = SECONDARY	JCM Review Date
<ul style="list-style-type: none"> • Provide child/youth and family with contact information for workers/service providers in new (additional) service area (written/verbal) 				
<ul style="list-style-type: none"> • If the child is Indigenous, plan how to involve the child's extended family and Indigenous community 				

Listening, Assessing and Finding Solutions: Listening to Family and Assessing/Identify Supports

Key Activities 	PLAN	ACTIONS	Identify Worker L = LEAD S = SECONDARY	JCM Review Date

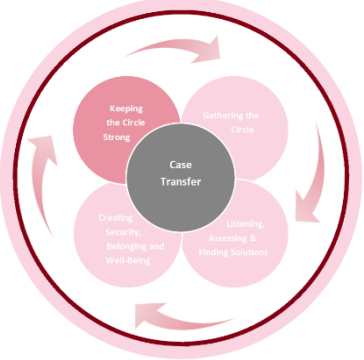
<ul style="list-style-type: none"> • Discuss and outline frequency of collaborative practice meeting/ICMs • Outline how regular communication occurs between the two workers 				
<ul style="list-style-type: none"> • Required referrals completed 				
<ul style="list-style-type: none"> • Identify any gaps in services for the child/youth and family • Identify how these gaps will be addressed • How can these gaps be bridged 				
<ul style="list-style-type: none"> • Financial support consideration 				
Documentation <ul style="list-style-type: none"> • Complete assessments, recordings and plans as required by policy 				
<ul style="list-style-type: none"> • Update electronic records 				

Creating Security, Belonging and Well-Being: Planning and implementing the transition

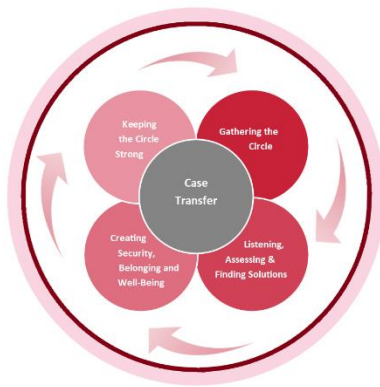
<p>Key Activities</p> 	<p>Plan</p>	<p>Actions</p>	<p>Identify Worker L = LEAD S = SECONDARY</p>	<p>JCM Review Date</p>

<ul style="list-style-type: none"> Determine the frequency of how often a worker should make contact and meet with the child, youth, family, care-provider/caregiver 			
<ul style="list-style-type: none"> Identify supports that may be required between meetings, including documenting support activities/persons required. 			

Keeping the Circle Strong: Ongoing case management and provision of supports

<p>Key Activities</p> 	<p>Plan</p>	<p>Actions</p>	<p>Identify Worker L=LEAD S= SECONDARY</p>	<p>JCM Review Date</p>
<ul style="list-style-type: none"> Planning for ongoing child and family file management circles: <ul style="list-style-type: none"> How frequent are the meetings? What does support between meetings look like? 				
<ul style="list-style-type: none"> CYIC: What is plan for return/out of care; planning for ongoing reassessment of placement? 				

<ul style="list-style-type: none"> Overall management of the case including all decisions, supervisory consultations, and file management/documentation 			
<ul style="list-style-type: none"> Where the child is Indigenous, ensure ongoing involvement of Indigenous community 			
<ul style="list-style-type: none"> Reassessment of placement 			



- Planning for ongoing child and family file management engagements, including frequency and supports required to engage.
- Between engagements, monitor how supports identified are going, and follow up where needed.
- CYIC: What is plan for return/out of care/ongoing reassessment of placement?
- Review overall management of the case including all decisions, supervisory consultations, and file management/documentation
- Ensure ongoing involvement of the Indigenous community or other culturally relevant family supports
- As per Legislation and Policies, Ensure Reassessment of Placement is reviewed