

Staff Expectations- Social Workers (I, II, III)

NOTE: Our case management system is moving from Child Welfare Services/Case Management System (CWS/CMS) to Child Welfare Services-California Automated Response and Engagement System (CWS-CARES). This policy includes language, forms/templates, and resources that will be reviewed and updated as we transition into CWS-CARES.

(Revised 08/21/26)

[Forms](#)

[Resources](#)

[Related Policies](#)

[Introduction](#)

[Guidelines for SW Support](#)

[SW I Responsibilities](#)

[SW II Responsibilities](#)

[SW III Responsibilities](#)

[Requesting Assistance](#)

[Mandated Reporter](#)

[Supervision](#)

[Workforce Development](#)

[Alignment with SET](#)

Forms

The following forms are referenced in this policy:

- 04-129 Request for Case Support Services (CWS/CMS template)
- 22-10 Supervision Template

Resources

This policy references the following resources:

- CFWB Intranet Guides and Resources
- Foundations SharePoint site with foundational material and one note with tips on task completion
- SET Safety Enhanced Together (SET) SharePoint to review practices and behaviors
- Supervision Template Provides tips and suggestions for how supervisors can complete the Supervision Template.

Related Policies

This policy references the following policies:

- Workforce Development
 - Highly Vulnerable Children
 - Visitation
 - Mandated Reporters
 - Abuse Allegations Received by Non-Hotline CFWB Staff
 - Injuries to Children in Open OCS Cases or Investigations
-

Introduction

The role and function of a Social Worker (SW) can vary across program assignment and depend on classification (I, II, III). The following expectations are intended to provide a general framework for SW practice within CFWB. They are meant to allow for the use of professional judgement, as well as individual variations in background, style, and personality. While variation is acceptable, a commitment to consistently demonstrating Live Well San Diego and Safety Enhanced Together (SET) core values, expectations, and behaviors is expected. This will ensure that every child, youth, family, and community partner can be assured. CFWB is continually working towards the vision that every child grows up safe and nurtured.

Guidelines for SW Support

SWs should only be assigned or requested after other existing resources have been explored and exhausted (i.e. parents, caregiver, and support systems). The Protective Services Worker (PSW) will evaluate service needs carefully to determine the appropriate service provider before requesting a SW's assistance. It may be more appropriate for the PSW or caregiver to perform sensitive or critical service needs, such as transportation and support during evidentiary exams and diagnostic medical appointments. The following should be considered prior to making a referral for a SW's assistance:

- Community agencies providing similar services.
- Referrals for supervised visitation will include the appropriate setting for the level of supervision requested.
- Service referrals/cases on HVC, high risk with potential dangers such as risk of flight, violence, etc. See [Highly Vulnerable Children Protocol](#) for more information.

If approved by SW's Protective Services Supervisor (PSS), the assigned PSW will advise the SW with all of the potential dangers/risks.

The SW may be part of the assessment for ongoing service needs, such as providing supervised visitation and transportation to therapy appointments. The caregiver will be encouraged to re-schedule appointments for a time when the caregiver is available to provide transportation services.

**SW I
Responsibilities**

SW I primary responsibilities are to assist the assigned PSW in case management activities. These may include, but are not limited to the following:

- Transport children to their visitation, medical appointments, Court hearings, etc.
- Supervises visits between parents and children as outlined in the Visitation policy.
- Documents observation made during visitation.
- Follow up on progress in case plan services.
- Document all contacts and referrals provided to the family and service providers.
- Complete and submit referrals to services for parents and children.
- Translate conversations if language is a barrier for the PSW.
- Assist with Indian Child Welfare Act Noticing and related tasks.
- Housing resource navigation and application assistance.
- Provide feedback to case carrying PSWs.
- Engage and effectively communicate with culturally diverse populations.
- Specialized tasks based on program assignment.

NOTE: SW I classification will not be assigned primary on any cases or referrals.

Please see [Social Worker I](#) job description for additional details.

For a full list of SET practice behaviors, please refer to the [SET SharePoint page](#).

**SW II
Responsibilities**

SW II responsibilities may include SW I assigned duties as listed above. SW IIs may not be assigned primary assignment on referrals or cases; they may be assigned secondary to support SWs with responsibilities outlined below. They may be assigned to ER, CS, VS, CI, Placement, Special Services (Residential/EFC)/Hotline, and Adoptions.

SW II responsibilities can include (but are not limited to):

- Employ data gathering methods to acquire diagnostic information:
 - Shadow primary assigned SWs on investigation, observe and document contact with children/youth, caregivers, service providers, and others on behalf of SW, as approved by SW/PSS
 - Complete compliance visits for VS/CS/Adoptions cases at the direction of a SW
 - Conduct and document collateral calls
 - Request records: police reports, calls for service, parent search etc.
 - Conduct parent searches and other family finding efforts such as requesting CalSAWS, Google, yellow pages, etc.
 - In coordination with primary SW, identify, assess, and treat social, educational, physical, and psychological dysfunction among children/youth and families:
 - Make referrals on behalf of SW for child/youth, caregiver, parent/guardian to services
 - Follow up on progress towards case plan goals or safety plan action items as directed by primary SW
 - Complete Education Notebook in CWS/CMS for children/youth
 - Update demographic information in CWS/CMS notebooks
 - Prepare and write professional reports, letters, and case summaries, to be reviewed by the primary SW:
 - Generate and complete investigation narratives
-

**SW II
Responsibilities
(cont.)**

- Generate, complete, and mail referral closing letters
- Generate, complete, and mail Reporting Party letters
- Create Genograms and Ecomaps
- Other Program specific duties
- Exchange information with co-workers and individuals outside of the Agency

Please see [Social Worker II](#) job description for additional details.

For a full list of SET practice behaviors, please refer to the [SET SharePoint page](#).

**SW III
Responsibilities**

SW III responsibilities may include SW I and SW II assigned duties as listed above as well as their own assigned caseload. SW III may also be assigned to the Office of Child and Family Strengthening with unique duties and responsibilities. SW IIIs have percentages of caseloads that they can be assigned to as primary. These caseloads are listed below.

ER	CS
9 referrals per month	11 cases per month

If these caseloads are ever equal or more than the average caseload of a PSW, they will be lowered to no more than 75%.

Caseload assignments for SW IIIs include:

- 10-day referrals only
- Referrals/Cases will not include:
 - Highly Vulnerable Children (HVC)
 - High profile
 - Sexual abuse
 - Complex care/high needs youth (examples include: youth experiencing 5150 psychiatric holds, complex diagnosis, confirmed sexual exploitation, active to probation)
 - Fatality or near fatality
 - Severe non-accidental or life-threatening injuries
 - Referrals that would normally be assigned to a specialty unit (Medically Fragile, ISU, Open Case Investigations Unit)
 - Law enforcement entries into Polinsky Children's Center
 - Prior failed reunifications
 - Children under 3 with serious injuries

If a referral is promoted to a case, the SW III is responsible for all activities including, but not limited to: protective custody warrant, removal, court report, placement decisions.

If a referral comes in that is not initially identified as the non-assignment categories, but becomes one through the course of the investigation, the SW III will remain the primary and will receive additional support from their supervisor, as needed.

**SW III
Responsibilities
(cont.)**

Case management duties include, but are not limited to:

- Write clear, concise case summaries, contacts, case plans, and court reports.
- Make case recommendations to the court such as placement, services, etc.
- Complete formal and informal assessments.
- Attend multi-disciplinary meetings and consult on cases.
- Complete in-person monthly contacts with children and parents.

SWIII staff are also required to meet the training requirements outlined in the [Workforce Development](#) policy.

Please see [Social Worker III](#) job description for additional details.

For a full list of SET practice behaviors, please refer to the [SET SharePoint page](#).

**Requesting
Assistance**

To request the assistance of a SW to assist a PSW refer to the following table below.

Step	Who	Action
1	PSW	Submit an 04-129 Request for Case Support Services) to the PSS of the SW. NOTE: If the referral is a request for an emergency service need, the assigned PSW will contact the PSS by telephone.
2	PSS	Evaluate the service referral for appropriateness and staff availability.
3	PSS	• Assign the referral to a SW. • Notify PSW if there is availability or if the referral is appropriate. • Clarify with the PSW any unclear service referrals. Ensure a warm hand off is completed as needed

Mandated Reporter

In cases of suspected child abuse or neglect, SWs are [Mandated Reporters](#) who must immediately report any instances of suspected abuse by parents, caregivers and others while performing their job duties. SWs will use guidance provided in [Injuries to Children in Open OCS Cases or Investigations](#) and [Abuse Allegations Received by Non-Hotline CFWB Staff](#) to aide their assessment. SWs should immediately report any concerns to the primary PSW and PSS who can support their assessment and duty to report. If a SW has a concern for a family but are unsure if it constitutes abuse or neglect, they will consult with primary PSW and PSS for decision support.

Supervision

SWs receive regular supervision and other opportunities for consultation and professional development regarding referrals, cases, and other duties. Regular supervision includes:

- individual supervision- SW I and II once a month, SW III twice a month
 - participation in unit meetings and/or group supervision.
-

Supervision (cont.)	SWs receive regular supervision and other opportunities for consultation and professional development regarding referrals, cases, and other duties. Regular supervision includes: • individual supervision- SW I and II once a month, SW III twice a month • participation in unit meetings and/or group supervision. SWs can review the Supervision Template and Tips for Supervision as a way to review what to expect and prepare to discuss during individual supervision. SWs will receive a copy of the Supervision Template after each supervision. SW responsibilities related to this area are to: • Utilize supervision and consultation with supervisor(s), county counsel, policy analysts, etc. to gain clear understanding of the safety concerns, strengths, and goals. • Use supervision for assistance in decision-making and addressing issues that may surface, including personal bias or other concerns that may impact balanced decision-making • Regularly update supervisor of casework issues, problems, and concerns. • Advocate for changes to better serve clients and coworkers, including new or enhanced community resources, and ideas for policy improvements. • Prioritize caseload updates. • Be prepared to update supervisor on previous action items from supervision. • Discuss needs and opportunities for development, training, certifications, or resources. • Ensure all required trainings and certifications are completed timely. • Keep supervisor aware of planned (and unplanned, to the extent possible) leaves to ensure workload coverage. • Utilize the designated chain of command for items that cannot be resolved between the SW and supervisor. • Participate in unit meetings, program integrity meetings, and multi-disciplinary team meetings. • Request access to cross-training opportunities. • Review training materials on SharePoint and discuss questions or issues on task completion.
Workforce Development	SW staff of all levels are encouraged to access training, coaching, and other workforce development activities to support their ongoing learning and growth. SW II and III staff are required to meet the annual training requirements outlined in the Workforce Development policy. SW I's are not required to meet the annual training requirements outlined in the Workforce Development policy.
Alignment with SET	This policy supports SET Value 6 and the guiding principles of having a proactive workplace culture of reflection, responsiveness, and shared responsibility that is guided by the practice framework values. It also supports the agency practices to be knowledgeable of and utilize SET practice behaviors to guide practice with families and partners, and to appreciate teamwork and a multi-disciplinary approach to practice.