



# ANCR Program and Service Delivery Policy

<b>Case Recording and Documentation Standards</b>	<b>Policy Category/Number</b>	<b>PSD 8</b>
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<b>Responsible Authority:</b> Associate Executive Director of Service	<b>Applicable to</b>	<b>All Staff</b>
	<b>Created by</b>	<b>Associate ED of Service</b>
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## 1.0 Policy Statement

In our role as a robust, multi-jurisdictional intake agency, ANCR recognizes the necessity of clear and thorough documentation in order to produce best results for children and families. ANCR strives to use case recording tools and processes efficiently, effectively and responsibly in documenting all aspects of service provision within our agency.

## 2.0 Legislative Base

*The Child and Family Services Standards 1.7.1*

Child and family services agencies must use the provincial automated **Intake Module** for services to families and child protection interventions under *The Child and Family Services Act* (see Policy in Section 1.1.1, [Intake](#)). This policy is not limited to agencies designated to provide joint intake and emergency services under [section 21](#) of *The Child and Family Services Authorities Act*.

All Child and Family Services agencies are required to use CFSIS for cases that are a provincial financial responsibility and are new or were transferred after November 23, 2003.

## 3.0 Definitions

**Record** - means a record of information in any form, and includes information that is written, photographed, recorded or stored in any manner, on any storage medium or by any means, including by graphic, electronic or mechanical means.

## 4.0 Policy

- 4.1 All case related client and collateral contacts and related documents (including interviews, interventions, telephone conversations, email communication, written referrals, and medical information) will be recorded on the Child and Family Services Information System (CFSIS) or Intake Module (IM).
- 4.2 Workers will record information in writing or electronically within 24 hours of the contact. Handwritten information will be promptly entered into the information system in the form of a case note.
- 4.3 Any and all handwritten notes become part of the official record and are to be maintained on the physical file. The handwritten notes do not need to be scanned into CFSIS or the IM.



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- 4.4 Workers will use **ANCR Client Contact Forms** for recording handwritten notes, which will be signed and dated.
- 4.5 Contacts received by Crisis Response and After Hours programs regarding non-child welfare matters will be logged on the IM.
- 4.6 Abuse Reports (attached to IM/CFSIS) follow same standards of recording as information directly entered into the IM/CFSIS.
- 4.7 Case consults will be documented by the worker in the IM/CFSIS. (See *ANCR Documentation and Case Recording Procedures* for further information)
- 4.8 When a case decision is made that requires higher level of approval (supervisor, program director or executive director of service) the decision and individual who authorized the decision will be noted.
- 4.9 All information gathered, pertinent to determining safety, risk and case disposition, will be documented by the recipient of the information. Workers will document assessments using standardized tools and templates as outlined in program manuals.

### 5.0 Core Documents

- 5.1 See the *ANCR Documentation and Case Recording Procedures* for more information on the application of this policy.