



Advocate GETTING STARTED Checklist

After each “Getting Started” step:

- ✓ *Update your Case Supervisor*
- ✓ *Create a log entry in Advocate Link*

GETTING STARTED ON YOUR CASE - OVERVIEW

STEP 1: Complete Advocate Link Webinar Training

STEP 2: Contact and meet with the Dependent’s Social Worker (PSW)

STEP 3: Contact and meet with the Dependent’s Attorney

STEP 4: Contact the Caregiver (parent caregiver, foster parent, group home staff, residential care coordinator) to introduce yourself and your role, and to inquire about setting a time and place to meet with the youth.

STEP 5: Meet the youth

STEP 6: Contact the school placement

STEP 7: Register for a Continuing Education (CE) training

GETTING STARTED ON YOUR CASE

1. **[Complete Advocate Link \(AL\) Webinar Training](https://sfcasa.org/advocate-link) at sfcasa.org/advocate-link**
After watching the webinar, you will complete tasks on AL to demonstrate your understanding. Instructions are included in the webinar link above.
 - a. ***Note:** After you choose a case at your file review, you will receive a welcome email from Advocate Link with login instructions. Once you have completed the required AL tasks, please log into AL, click on Continuing Education, and follow the prompts to request CE credit for “Advocate Link Training”.*
2. **Contact and Meet (in person) with the Dependent’s Social Worker (PSW)**

Prior to the meeting:

- a. Review the CASA file of your assigned case. Generate a list of case specific questions.
- b. Create a list of documents needed from the PSW. *Please note CASAs may make copies of most documents in the case file. However, CASAs may not copy certain documents specific to youth psychological assessments (including CANS), any parent psychological assessments, and any parent arrest records contained in the HSA-FCS file. However CASAs may often review youth psychological assessments. If the PSW asks that you do not, please honor their request and check in with your Case Supervisor afterwards.*
 - i. Most recent HSA Status Review Reports (check for Confidential Placement status)
 - ii. Recent Educational Records
 - iii. Recent IEP (If youth receives Special Education services)
 - iv. Health and Education Passport (HEP) (ask for most recent): If the HEP is not available, look for the most recent CHDP summaries (1132-C) of medical and dental appointment.
 - v. CSE-IT screening tool score if youth is 10 yrs + (if PSW does not allow you to copy, please note the Indicator Scores and Total Score of the CSE-IT)
 - vi. Family discovery and notification documents*
- c. Set up day/time for your meeting. Please keep in mind PSWs (Protective Services Worker) often must triage phone calls and it may be a week or longer before they return your initial call. If a week or more goes by and there is no out-of-office message, please try again. If you have tried twice weekly for three weeks, contact your SFCASA Case Supervisor (CS) for help with getting connected to the PSW.

During your meeting:

- a. Introduce yourself as the recently assigned CASA for the youth.
- b. Ask the PSW to provide a detailed overview of the case based on the HSA (Human Services Agency) file. Give the PSW the best phone number and email to reach you. Ask for their preference for communication (email, text, phone?).
- c. Questions to ask the PSW:
 - i. Who holds education rights for the youth? What is their contact information?
 - ii. With whom and where does the youth currently live? What is their contact information?
 - iii. Where is the youth's case in the court hearing process? What is the case plan for the youth? What is the date and type of the next hearing?
 - iv. What is the youth's school placement and grade?
 - v. Has youth received state mandated (SB89) Sex Ed curriculum in school? If not, share [Online Sexual Ed](#) by RHEP (Reproductive Health Equity Project) info with them.
 - vi. If the CSE-IT assessment has been completed for the youth (if 10+ years), what was the outcome? What vulnerabilities and strengths were identified, and how will the assessment inform interventions or services for the youth?
 - vii. What do they believe to be the highest advocacy priorities for the youth?
 - viii. Can they help with a warm introduction for you and the youth?

After your meeting:

- a. Send a follow-up email to the PSW thanking them for their time and including your contact information.
- b. Email a brief statement about your conversation with the PSW to your case supervisor.

- c. Enter information and files gathered in AL (Questions 1-6 to be entered in the case, and Question 7-8 shared in a log).

* Permanency worksheets, family finding documentation and the initial family notification record (for cases with a detention date of 2010 or later per CA AB 938). These documents will provide you with a summary of this research and allow you to familiarize yourself with names of family and kin connections.

3. Contact and Meet with the Dependent's Attorney

Prior to the call/meeting:

- a. Review the CASA file of your assigned case. Generate a list of case specific questions for the attorney.

During your call/meeting:

- a. Introduce yourself as the recently assigned CASA for your youth.
- b. Give the attorney the best phone number and email to reach you. Ask for their preference for communication.
- c. Questions to ask the Attorney:
 - i. Confirm the type, date, time and department of the next court hearing.
 - ii. Ask where the case is in the court hearing process, and what will happen/be decided at the next hearing.
 - iii. Ask about any important history that you should know before meeting with the youth.
 - iv. If needed, ask if they are able to support a warm introduction for you and the youth.

After your call/meeting:

- d. Send a follow-up email to the Attorney thanking them for their time and confirming the date, time and department of the next court hearing and including your contact information.
- e. Email the updated hearing information and a brief statement about your conversation with the attorney to your case supervisor.
- f. Create a log entry in AL for this activity and enter the contact type, person and length of the phone call.

Additional Information

CASAs may copy all information related to the child, except youth psychological assessments, parent/guardian arrest records and any parent/guardian psychological profiles. The documents you can see in Advocate Link are only documents on file with the Court; it is incomplete when you start on the case, and we look to you to create a more complete record through the PSW meeting and HSA file review.

4. Contact the foster parent, group home staff member, parent caregiver, or residential treatment care coordinator to introduce yourself and ask for their help in introducing you to the youth.

- a. Introduce yourself as the recently assigned CASA, answer any questions they have about your role, and schedule your first visit with the youth.
- b. Ask them about the information they feel you should know before meeting the youth.

- c. Give the caregiver the best phone number and email to reach you. Ask for his/her preference for communication.
- d. Email your case supervisor about your first meeting. It can be a brief message.
- e. Create a log entry in AL for this activity and enter the contact type, person, and length of the phone call.
- f. Upload any new documents procured to AL

Additional Information

Caregivers and parent(s), whose youth is placed with them, have the most contact with the youth and are a source of valuable. Please be mindful of the many commitments that come with being a caregiver to a foster youth. In most instances, you will be asking for their help to introduce you to your assigned youth, and for their guidance and support with scheduling visits. Model good communication practices for the youth in your interactions with the caregiver.

5. Meet your youth at their placement.

- a. Important: plan to spend only 20-30 minutes with the youth during the first visit. Introduce yourself, be relaxed and friendly, and *avoid asking too many questions*. The goal of the first meeting is for the youth to experience you in a positive way.
- b. Spend a few minutes also getting acquainted with the caregiver. (Be mindful of confidentiality!)
- c. Email your case supervisor about your first meeting. It can be a brief message.
- d. Create a log entry in AL for this activity and enter the contact type, person, and length of the phone visit. Remember, you must include Travel Time.
- e. Upload any new documents procured to AL

Check in with your Case Supervisor (CS) within the first 1-2 weeks of starting on the case.

Please note that you must follow this protocol for confidentiality when emailing your CS:

Use the youth's initials instead of their full name in all electronic communication;
 You must use a personal email account that is not accessible to others (not a work email).
 Create a log entry in AL for this activity.

6. Contact your youth's school placement

- a. Identify the Foster Youth Liaison for the youth's school or district. Foster Youth Liaisons can found here: <https://www.cde.ca.gov/ls/pf/fy/ab490contacts.asp>
- b. Call the Foster Youth Liaison to introduce yourself.
- c. Provide a copy of your Court Order through secure communication (email directly to this person, handing it to them, or making sure they are at the fax machine when you send it)
- d. In collaboration with the youth and team, identify an appropriate staff member at the school to speak with about the youth's education.
- e. Schedule a time to meet in person (get copies of records!), or over the phone, to discuss:
 - i. Current academic standing, obtaining a copy of their transcript/grades.
 - ii. Academic strengths and concerns & Behavioral strengths and concerns.
 - iii. Current enrollment in, or need for, tutoring or support activities.
 - iv. School attendance.
- f. Email your case supervisor about your first meeting. It can be a brief message.
- g. Create a log entry in AL for this activity and enter the contact type, person, and length of the phone call.

- h. Be advised any school official may (and should!) ask for a copy of your court order. Please only send this communication through secure email, hand it to them in person, or send it through fax with them at the fax machine when sending. Also, you will want to be prepared to discuss your role and why you are requesting the information. Express your understanding of and adherence to the rules of confidentiality regarding foster youth.

7. Register for a Continuing Education (CE) training:

<https://www.sfcasa.org/continuing-ed/sfcasa-in-person-and-virtual-trainings>

8. Watch the [Court Report Writing webinar](#) prior to writing your first court report.

STAYING ACTIVE ON YOUR CASA CASE

Meet (and/or communicate) regularly with the youth.

The frequency of in-person visits will depend on the distance of your residence from the youth's placement and the agreement you have discussed with your CS. Contact with the youth on off weeks could include phone calls, texting, emails, or old-fashioned letters/cards (remember to only use the SFCASA mailing address!).

Maintain regular contact with the assigned PSW, attorney, and other service providers.

This contact is on an as-needed basis. However, regular communication with the care team is an important part of your role and greatly impacts your ability to be an effective advocate for the youth's best interests. *It is especially important to contact the attorney 5 weeks before the next hearing date to confirm the date, time, room and purpose of the hearing.*

Stay up to date on the following information: School attendance and progress; medical, dental and vision appointments.

As an advocate for your youth, it is important that we ensure that youth receive necessary medical and dental care and are supported to meet their educational goals.

Submit your log activities in AL at the end of each day or week. Advocate hours (activity log entries in AL) are required by the Judicial Council.

AL activity logs inform your CS what you are doing and with whom you are working. You will use these logs to write your court reports. Reported advocate hours provide program data to funders and partner organizations and are also required by the Judicial Council.

Watch the [Court Report Writing webinar](#) prior to writing your first court report.

Complete quarterly surveys in a timely manner.

Attend Continuing Education trainings.

- Four of the twelve required credits per year must be earned through participation in trainings offered by SFCASA.
- After 1 year of service, CASAs are required to attend one Harm Reduction CE per year.
- We find that CASAs who regularly attend CEs engage in more creative and impactful advocacy.

Be in communication with your CS!

It is ***your responsibility*** to be in communication with your CS on a monthly minimum basis, via phone, email or activity log. Your CS is a great source of counsel and support in what is often a very challenging, yet rewarding, Advocate experience.

Schedule a conversation with your CS 5 weeks before the next hearing date. Court report drafts are due **THREE WEEKS** before the hearing, and require a few weeks for the collaborative writing process. Your CS will provide you with instructions for how to appear virtually at the hearing.

Fun fact: If you believe the youth would feel supported by having Nemo the Court dog present at their hearing, discuss this with the attorney and ask that they make a request by e-mailing Nemo@sfcasa.org.

If you have further questions, do not hesitate to follow up with your CS!