

**ADMINISTRATIVE PROCEDURES #33**  
**USING MICROSOFT TEAMS AND ALLY-IL WITH YOUTH AND FAMILIES**  
**FOR INTACT FAMILY AND PERMANENCY CASES**  
**April 26, 2024 – PT 2024.03**

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**PART A: GENERAL INFORMATION**

**Section 33.10 Purpose**

This Administrative Procedure provides guidance to Department of Children and Family Services (DCFS) and private agency intact family and permanency caseworkers and their supervisors regarding the use of Microsoft Teams (“Teams”) and Ally-IL (“Ally”). Aside from the traditional fax, email, and phone systems including teletypewriters and telecommunications device for the deaf, Teams and Ally are the only other DCFS approved communication tools available to workers, children, families, foster parents, and community providers. Ally virtually connects:

- a) Caseworkers and supervisors with youth and parents in intact family cases;
- b) Caseworkers and supervisors with youth in care, parents, and caregivers in permanency cases; and
- c) Caseworkers, supervisors, youth, parents or caregivers with service providers, Ally Team members, and other support personnel.

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The use of Teams and Ally will promote *flexibility in the development of a coordinated child and family services program that utilizes community-based agencies and ensure all children are raised in safe, loving families* [42 USC 621] by:

- a) *Protecting and promoting the welfare of all children.* [42 USC 621(a)]. Caseworkers and State of Illinois (“SOI”) Microsoft Teams users can use chats, calls, and video conferencing to enhance their ability to contact one another and assess the youth or a family member’s well-being in real time. Teams chat feature enhances SOI Microsoft Teams user’s ability to supplement contact with the youth and family between visits;
- b) *Preventing the neglect, abuse, or exploitation of children.* [42 USC 621(b)]. The video chat feature allows caseworkers to see and interact with youth beyond the minimum required contacts. Increasing opportunities for contact can enhance the caseworker’s awareness of a youth’s well-being, activities, and safety;
- c) *Supporting at-risk families through services which allow children, where appropriate, to remain safely with their families or return to their families in a timely manner.* [42 USC 621(c)]. Ally will enhance participation in Child and Family Team meetings by allowing virtual attendance for participants that cannot attend in person;
- d) *Promoting safety, permanence, and well-being of children in foster care and adoptive families.* [42 USC 621(d)]. Enhancing contacts between youth and their alliances can facilitate tangible progress toward achieving the youth’s permanency goal. Ally is useful between visits or appointments to share or request files, discuss action steps, permanency goals, and for holding impromptu meetings when needed; and
- e) *Providing training, professional development and support to ensure a well-qualified child welfare workforce.* [42 USC 621(e)]. See Part C of this administrative procedure.

With Ally, caseworkers can create a team of alliances for each youth and family and can schedule video visits and host virtual meetings. Families can use Ally to contact their caseworker to discuss current family issues, or contact their service provider (e.g., a therapist or medical provider) to easily reschedule an appointment. Required contacts between caseworker and family or parent and youth become easy to establish with access to everyone at one time. It can be used to facilitate a family’s most immediate needs and to initiate long-term services critical to stabilizing a family. The use of Ally also supports the Child and Family Team Meetings’ Core Practice Model.

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**Section 33.20 Definitions**

“Age or developmentally-appropriate” means *activities or items that are generally accepted as suitable for children of the same chronological age or level of maturity or that are determined to be developmentally-appropriate for a child based on the development of cognitive, emotional, physical, and behavioral capacities that are typical for an age or age group; and in the case of a specific child, activities or items that are suitable for the child based on the developmental stages attained by the child with respect to the cognitive, emotional, physical, and behavioral capacities of the child.* [42 U.S.C. 675(11)(a)]

“Alliance” means any participant of a youth’s Ally team including members, guests, assigned caseworkers and their supervisors.

“Ally Team” means a specified group of positive supports and service providers working together to promote the well-being of a youth involved with the Department.

“Caregiver” means *a foster parent with whom a child in foster care has been placed or a designated official for a childcare institution in which a child in foster care has been placed.* [42 USC 675(10)(B)]

“Case record” means the hard copy file kept in the DCFS field office and the DCFS electronic record storage.

“Channels” are *dedicated sections within a team to keep conversations organized by specific topics... Channels can be open to all team members (standard channels), or selected team members (private channels).*<sup>1</sup>

“Chat” means all electronic communication including audio, video or text messages made via Microsoft Teams.

“Confidential information” means any information protected by State and Federal laws, rules, and regulations. See **Section 33.30**.

“Confidentiality” means the protection of confidential information of persons served by the Department.

“Ally Team Co-owner” or “Owner” means the child’s caseworker and their supervisor who manage administrative tasks such as, adding and removing members and guests, and changing other team or channel settings.

“Department” means the Department of Children and Family Services.

“Guest” means any participant of a youth’s Ally team that is not a licensed SOI 360 user.

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“Member” means a participant of a youth’s Ally team that is operating under a licensed SOI 360 user agreement through their employment status.

“Onboarding” means the process of authenticating an individual for participation in an Ally team.

“Parents” *means biological or adoptive parents or legal guardians* of a youth. [42 USCS 675(2)].

“Private channels” are owner created *focused spaces for collaboration within* an Ally team. *Only the users on the team who are owners or members of the private channel can access the channel. Anyone, including guests, can be added to a private channel as long as they are already onboarded to the team.*<sup>ii</sup>

“Social media” means websites and applications that allow users to create and exchange communication for social interactions.

“Standard channel” means an owner created channel of communication where all members and guests have access to post and read new and historical messages.

“Teams” means Microsoft Teams, which is a proprietary business communication platform developed by Microsoft, as part of the Microsoft 365 family of products, offering workspace chat and videoconferencing, file storage, and application integration.

“Youth” for the purpose of this administrative procedure, includes individuals meeting the definition of a “Youth in Care” in the Children and Family Services Act, 20 ILCS 505/4d, and is *a person placed in the temporary custody or guardianship of the Department pursuant to the Juvenile Court Act of 1987*, or is a person under 18 years of age who receives intact family services.

**Section 33.30 Laws and Regulations regarding Confidential Information**

- a) Pursuant to the Abused and Neglected Child Reporting Act, *all records concerning reports of child abuse and neglect or records concerning referrals under this Act and all records generated as a result of such reports or referrals, shall be confidential and shall not be disclosed except as specifically authorized by this Act or other applicable law.* 325 ILCS 5/11.
- b) Additional laws and regulations regarding confidential information:
  - 1) Reporter, source, and other persons with information, 325 ILCS 5/7.19, and DCFS Rules 431.70 and 431.85.
  - 2) Social security numbers, Identity Protection Act, 5 ILCS 179.
  - 3) HIV-related information, AIDS Confidentiality Act, 410 ILCS 305/9, Consent by Minors to Health Care Services Act, 410 ILCS 210/4 and DCFS Rule 431.110.

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- 4) Sexually transmitted diseases, 410 ILCS 210/4.
- 5) Juvenile arrest and conviction information, Juvenile Court Act, 705 ILCS 405/1-7 & 8.
- 6) Mental health information, Mental Health and Developmental Disabilities Confidentiality Act, 740 ILCS 110/3 and DCFS Rule 431.100.
- 7) Substance abuse records, Substance Use Disorder Act, 20 ILCS 301/30-5(bb), 42 U.S.C. 290dd-2, 45 CFR 2.14, and DCFS Rule 431.105.
- 8) Foster parent identification information, 20 ILCS 505/35.3 and DCFS Rule 301.430.
- 9) Adoption records, Adoption Act, 750 ILCS 50/18, 18.05, & 18.1 and DCFS Rule 431.70.
- 10) Law Enforcement Agencies Data System (LEADS) information, 325 ILCS 5/7.4(e) and DCFS Rule 431.90(b)(2).
- 11) Medical records, Medical Patient Rights Act, 410 ILCS 50/3(a) & (d), 20 ILCS 505/35.1, and DCFS Rule 431.110.
- 12) HIPAA privacy regulations 45 CFR 164.
- 13) Student school records, Illinois School Students Records Act. 105 ILCS 10/7 *et seq.*, and 20 USC 1232g.

**Section 33.40 Required Acknowledgements and Consents to Participate in Ally-IL**

Due to the multi-layered confidential nature of DCFS reports, referrals, and treatment related to those reports or referrals, it is essential that the caseworker is aware of the family's history and acquire the correct consents based upon what information might be disclosed if not already done at case opening.

- a) Required Acknowledgements. To participate in Ally:
  - 1) Youth deemed age and developmentally appropriate to use Ally-IL, parents, and caregivers in permanency cases must:
    - A) Sign the **CFS 2034, Social Media/Mobile Safety Agreement**; and
    - B) Digitally accept the State of Illinois and Microsoft Terms of Use ("Terms of Use");
  - 2) Parents in intact cases and caregivers in permanency cases must:
    - A) Sign the **CFS 2034**; and

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- B) Digitally accept the Terms of Use.
- 3) Guests are required to:
  - A) Sign a **CFS 2051, Acknowledgement of Confidentiality**; and
    - i) The caseworker shall:
      - a) explain the purpose of the **CFS 2051**;
      - b) Discuss the general content of the DCFS confidentiality provisions. See **Section 33.30**; and
      - c) obtain the guest's signature.
    - ii) By signing the **CFS 2051** all guests and members carry the same responsibility of following all federal and state laws, rules, and regulations regarding confidentiality and the protection of confidential information.
  - B) Digitally accept and agree to the Terms of Use.
    - i) By accepting the terms of use, guests authorize the sharing of their names, email address and profile photo with the youth's Ally team.
    - ii) Guests can alleviate any concerns regarding their email accounts by providing an email account to use specifically for Ally.
- b) Required Consents for an alliance to be invited to join Ally:
  - 1) All youth must sign a **CFS 600-3 Consent for Release of Information** for each alliance if the information released to the alliance could contain any substance abuse treatment information that the youth has received. 42 CFR 2.14(a) and 20 ILCS 301/30-5(ee); or
  - 2) Youth aged 12 and older, must sign a **CFS 600-3** for the alliance if the information released to the alliance could contain a mental health diagnosis, sexually transmitted disease, or treatment information regarding the youth. 740 ILCS 110(4).

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- 3) Except as indicated in subsections (b)(1) and (b)(2) of this Section if the information released could contain any other confidential information pertaining to the youth, at least one parent in intact family cases, or the Guardianship Administrator in permanency cases, must sign a **CFS 600-3**.
- 4) Parent and Guardian confidential information:
  - A) If any information released to the alliance could contain any confidential information listed in **subsection 33.30(b)** regarding the parent or any information regarding services received by the parent then the parent to whom that information pertains must sign a **CFS 600-3** for the alliance.
  - B) At least one parent must sign a **CFS 600-3** if the information released is just in regard to DCFS involvement with the family, regardless of whether it contains any of the confidential information listed in **Section 33.30** or any information regarding services received by the parent.
  - C) In intact family cases one parent must sign a **CFS 600-3** to release school student records to an alliance.
- 5) In permanency cases:
  - A) The Guardianship Administrator must sign a **CFS 600-3** to release school student records to an alliance.
  - B) The caregivers must sign a **CFS 600-3** for an alliance if any information released to the alliance could contain any identifying information regarding that caregiver including but not limited to their name, address, and place of employment.
- 6) Service Providers. Before any confidential information can be provided to a service provider, that they did not generate through the services they provided, the party to whom the confidential information applies must sign a **CFS 600-3**.
- c) The caseworker shall maintain all signed **CFS 2034**, **CFS 600-3**, and **CFS 2051**, in the youth's case record and document each discussion regarding the same in a system of record contact note.

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**PART B: DUTIES OF CASEWORKER AND SUPERVISOR**

**Section 33.50 Protecting Confidential Information**

- a) Information transmitted through Ally and Teams is confidential. See **Section 33.30**. The caseworkers and their supervisors shall ensure that confidentiality is maintained within the chats and meetings they facilitate. Therefore, intact family and permanency caseworkers shall:
  - 1) Discuss confidentiality and the appropriate use of Ally with each youth and alliance;
  - 2) Refresh their understanding of the DCFS Rules and State and Federal Statutes listed in **Section 33.30** and explain these policies to youth and alliances as they relate to the use of Ally;
  - 3) Frequently remind youth and alliances to be mindful of the information being shared in Teams and the different roles of each alliance;
  - 4) Ensure that youth and alliances understand that confidentiality does not negate mandated reporter requirements as it relates to safety and risk of harm;
  - 5) Inform youth and alliances that data entered in Teams or Ally communication is archived and discoverable;
  - 6) Document their communications regarding confidentiality and safety with youth and alliances in a system of record contact note; and
  - 7) Wear earbuds or take other precautions to prevent others from hearing conversations that occur in virtual or teleconference meetings in an open, shared, or common space. DCFS staff can receive iOS earbuds (provided with DCFS-issued iOS devices) by contacting and requesting them from the DCFS Help Desk.
- b) In protecting client data and information during the use of Teams and Ally, caseworkers and supervisors shall not:
  - 1) Place confidential information in a team channel containing alliances that should not have access to that data;
  - 2) Add alliances to a team channel that includes confidential information that the alliance should not have access to; or
  - 3) Discuss confidential information in any chat when an alliance is not to have access to that information.
- c) Upon discovering that a breach of confidentiality has occurred, the caseworker shall immediately notify the DCFS Privacy Officer, via email, so that the breach can be quickly handled and mitigated. Send the email with the details of the breach of confidentiality to [DCFS.Privacy.Officer@illinois.gov](mailto:DCFS.Privacy.Officer@illinois.gov).



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**Section 33.60 Determining if Use of Ally-IL is Appropriate**

- a) The caseworker shall determine if each youth is age and developmentally appropriate to use Ally by considering their:
  - 1) Trauma history;
  - 2) Emotional well-being;
  - 3) Developmental ability;
  - 4) Psychological state; and
  - 5) Willingness and interest in participating in the use of Ally.
- b) If the caseworker believes the youth might not be age or developmentally appropriate for use of Ally:
  - 1) The caseworker shall consult with their supervisor;
  - 2) If the supervisor identifies concerns that require additional evaluation, a clinical staffing or clinical referral shall be conducted to determine the youth's appropriateness for the use of Ally;
  - 3) Mental and psychological appropriateness shall be determined by a licensed clinician; and
  - 4) If a casework decision is made that a youth is not appropriate to use Ally:
    - i) The caseworker shall rely on a parent in intact cases or a caregiver in permanency cases to provide an active email address;
    - ii) The parent or caregiver can facilitate virtual meetings and visits on behalf of the youth, and with the youth present; and
    - iii) All supervisory decisions made in determining the youth's appropriateness or ability to participate in Ally shall be documented in the Department's system of record.
- c) The caseworker shall discuss with the youth and their caregiver or parents, **Administrative Procedures #28, Social Media/Mobile Technology for Youth in Care, and Rule and Procedures 431, Confidentiality of Personal Information of Persons Serviced by the Department of Children and Family Services.**

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- d) When discussing the benefit of Ally with the youth, parents, or caregivers, caseworkers shall explain that the benefits of Ally include but are not limited to:
  - 1) Ease in sending and receiving mobile notifications;
  - 2) Providers find it helpful to communicate with and guide the family;
  - 3) For families with multiple health care providers on their team (e.g., early intervention team, nurse, psychiatrist, therapist), Ally will assist those providers with information sharing, enabling them to have a more immediate and shared understanding of the family's needs;
  - 4) Improving relationships between providers and the family. Enabling members to share and discuss their concerns with the family collaboratively can empower the family to recognize, accept and address those concerns;
  - 5) Ally simplifies scheduling and makes it easier to conduct quick meetings with family members or caregivers. Scheduling with Ally saves time and energy when coordinating meetings and ensuring that all members receive notifications;
  - 6) When a caseworker needs an immediate report or information from a provider, Ally can be used to help obtain them faster; and
  - 7) The time-saving effect is immediate. When a caseworker needs to contact multiple alliances (e.g., to schedule a Child and Family Team meeting, coordinate or reschedule a meeting, or share information or documents), that information can be sent once in a chat to that group making it no longer necessary to play "phone-tag", leave messages, or fax requests or consents.

**Section 33.70 Identifying Alliances**

- a) The caseworker shall introduce Ally and discuss social media use at the first in-person opportunity with youth and their families. This might be at the first home visit or a Child and Family Team meeting, etc.
- b) The caseworker shall discuss with youth, parents, and caregivers the significance of identifying positive supports to serve as alliances.
  - 1) The caseworker shall explain that alliances to a youth's Ally team can include:
    - A) Parents or caregivers;

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- B) The youth’s attorney or Guardian ad Litem;
  - C) Service providers (therapists, counselors, healthcare providers etc.); and
  - D) Other supportive persons (e.g., teachers, coaches, close family friends, or relatives).
- 2) Alliances may serve different functions and have different relationships with the family (e.g., providing transportation or financial assistance, provide services, or individuals whose participation is requested or required in certain meetings).
- 3) The caseworker shall explain that alliances cannot include:
  - A) Anyone that is a potential or established source of risk or a safety concern to youth, their family, or caregivers; or
  - B) Anyone who should not have unrestricted access to youth.
- c) When identifying alliances, caseworkers are to advise youth, parents, and caregivers to be mindful of those they would like to involve in their team chats and the kinds of personal information they will be sharing with them. When discussing potential alliances with the youth, parents, or caregivers, a caseworker may ask:
  - 1) Is this someone you trust with hearing the details of your family’s strengths and needs?
  - 2) Is this someone you would trust to participate in and help identify goals in a Child and Family Team meeting? and
  - 3) Is this someone you would trust to safely care for your children if you were not able to?
- d) If the youth can effectively communicate with the caseworker about Ally and it’s uses, the caseworker shall discuss with them those persons recommended to participate as an alliance in the Ally team.
- e) If a youth is unable to effectively communicate with the caseworker about Ally and it’s uses, the caseworker shall discuss the matter with a custodial parent or caregiver, in the presence of the youth, when possible.

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- f) Concerns from the youth, parent, or caregiver should be considered in the selection of alliances for the Ally team but the final decision to exclude, add, or remove them rests with the caseworker and their supervisor so long as the proper consents and acknowledgements are acquired. See **Section 33.40**.
  - 1) When the youth and caseworker disagree about the participation of a potential or existing alliance, caseworkers shall consult with their supervisor.
  - 2) Supervisors, after careful consideration, shall make the final determination to exclude and include any individuals as alliances.
- g) The caseworker will confer with each youth, parent, and caregiver at least every 90 days about the effectiveness of Ally and their identified alliances, and to identify new alliances.
- h) After careful consideration, caseworkers can add people to the youth's Ally team as positive supports are identified; always obtaining the required consents and acknowledgements for proper onboarding. See **Section 33.40**.
- i) All decisions made pursuant to this Section to exclude potential or existing alliances shall be documented in the DCFS case record by the supervisor.

**Section 33.80 Onboarding Alliances to Ally-IL**

- a) Prior to onboarding any alliances that have been identified and approved as described in **Section 33.70**, the caseworker must acquire the properly completed documents, as described in **Section 33.40**.
- b) During the onboarding process the caseworker shall:
  - 1) Advise alliances that they will receive an electronic invitation notification once they are fully onboarded and encourage them to send chats to the assigned caseworker to establish virtual connection regarding the identified youth; and
  - 2) Engage the youth and parent or caregiver in-person, practice sending chats to one another, and schedule and conduct a simulated practice meeting together.
    - A) DCFS caseworkers shall use their state-issued mobile device.
    - B) Private agency caseworkers shall install Microsoft Teams on their mobile device and sign in with their State of Illinois credentials.
    - C) Multi-factor authentication is required for DCFS and private agency users.
- c) See **Part C** for instruction on how to onboard alliances.

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**Section 33.90 Management of Ally, Hours of Operations, Disruptive Behavior, and Limitations**

- a) Ally may be used to facilitate meetings or other case-related activities as approved by the caseworker and their supervisor. The caseworker shall explain to the youth that they should follow the direction of the caseworker, including but not limited to:
  - 1) adhere to all laws, and DCFS Rules and Procedures regarding social media use, confidentiality, and file sharing;
  - 2) ask for assistance about anything they do not understand about using Ally;
  - 3) identify and communicate with positive supports;
  - 4) respect the working hours of their alliances;
  - 5) communicate emergencies following any 9-1-1 or Illinois Child Abuse Hotline (“hotline”) calls, once able to do so safely;
  - 6) refrain from profanity and inappropriate language;
  - 7) use Ally as a resource during a lock-out or to prevent a runaway situation;
  - 8) immediately report any misuse of Ally to the caseworker or their supervisor; and
  - 9) report any bullying, threats, or intimidation to the caseworker or their supervisor.
- b) Caseworkers shall inform each youth and alliance that using chat in Ally shall replace texting through other sources or applications once access to the Ally team is established.
  - 1) Teams indicates users’ availability status in nearly real time across platforms (Outlook, Teams, and Ally).
    - A) To maximize the usefulness of Ally, caseworkers should ensure their DCFS Outlook calendars are kept up to date.
    - B) Caseworkers should use the out-of-office feature to indicate their availability or unavailability to other users.
  - 2) Caseworkers should use and respond to emails, texts, and phone calls during their regular assigned workday. For caseworkers that work an assigned shift or flex time, this is their normal workday, not the agency’s workday.

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- 3) The caseworker shall clearly explain expectations of their availability, so everyone understands that Ally usage does not imply that the youth and their Ally team have immediate and persistent access to the caseworker or vice versa, and instruct the team members to:
  - A) Communicate non-crisis situations during the caseworker's work hours and explain that they may not respond when the "presence indicator" shows they are unavailable;
  - B) Make after business hours crisis calls to the DCFS Abuse and Neglect hotline at 1-800-252-2873; and
  - C) Call 9-1-1 in the event of an emergency or emerging safety issue to get an immediate response.
- 4) The caseworker shall instruct the youth to identify that they are youth in care or DCFS involved when calling either 9-1-1 or the hotline.
- c) Caseworkers shall explain to youth and their alliances that disruptive behavior, inappropriate discussions, and abusive language are expressly prohibited.
  - 1) Caseworkers and supervisors are responsible for managing participant interactions.
    - A) If a person is disruptive during an Ally meeting or chat, the caseworker or supervisor can use the mute feature to silence that individual.
    - B) If a caseworker or supervisor learns of disruptive behavior or inappropriate communication between alliances, they can remove any of the alliances from the team.
    - C) The caseworker shall discuss the issue of disruptive behavior or inappropriate communication with their supervisor who shall then document it and any decision made in the case record.
    - D) Removal from an Ally team will prevent the removed alliance from participating in any further Ally team activities.
    - E) All supervisory decisions made in determining the youth's appropriateness or ability to participate in Ally shall be documented in the Department's system of record.
  - 2) Caseworkers shall download any photos of significant relevance to the youth's safety from Ally and add them to the case record.

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- 3) Caseworkers shall immediately seek supervisory guidance regarding concerns about any inappropriate discussions, abusive language or suspected high risk behavior (e.g., trafficking), or any statements by a youth, parent or caregiver that suggest suicidal ideation or other indicators of risk of self-harm (e.g., “I am extremely depressed.”) or harm to others.
- d) When participating in Ally meetings or chats, caseworkers or supervisors shall remove any alliances that are not authorized to learn information in an on-going discussion.
- e) Unauthenticated guests:
  - 1) Are guests who are not fully onboarded to an Ally team. See **Section 33.40**.
  - 2) Are prohibited from participating in meetings due to confidentiality requirements, see **Sections 33.30, 33.40, and 33.50**, caseworkers or their supervisors shall:
    - A) Not forward meetings to external email addresses for Unauthenticated guests;
    - B) Remove unauthenticated guests from the Ally team including all chats and channels.
    - C) Immediately notify the DCFS Privacy Officer if a breach of confidentiality has occurred. See **Section 33.50**.
- f) Limitations:
  - 1) Ally shall not be used to replace any required in-person visitation in DCFS Rules or Procedures. See **Rules 301.200-301.255**. Additionally, Ally shall never be used as a substitute for contacting the Child Abuse Hotline. Members that are mandated reporters are to call the hotline directly at 800-25-ABUSE (800-252-2873) to report known or suspected abuse or neglect.
  - 2) Ally is a communication tool and not the official electronic storage of DCFS case records. Any communications or observations made or shared in Ally requiring documentation per other Department Rules and Procedures shall be documented in the case record.

**Section 33.100 File Sharing, Case Record, and Case Transfer and Closure**

- a) File sharing in Microsoft Teams. The caseworker and their supervisor can share and receive files through Ally including but not limited to documents, pictures, videos, and reports. Caseworkers shall explain to the youth and alliances how to share files within Teams.

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- 1) The standard channel allows youth and alliances to share documents and collaborate on drafting or editing documents.
    - A) Files uploaded in a standard channel are accessible by all alliances.
    - B) Caseworkers and supervisors can remove any participant that is not authorized to receive information in an on-going chat in a standard channel.
  - 2) Private channels allow alliances to have a separate and secure conversation space.
    - A) In private channels:
      - ii) Members can share files between any subset of a youth's alliances, including new alliances added to a private channel.
      - ii) Caseworkers or Supervisors can add and remove any existing alliance to and from a private channel. When new alliances are added to the private channel, they have access to the previously shared information in that private channel.
    - B) Guests, members, and youth cannot create private channels, but they can participate and file share in any private channel they are added to.
  - 3) Standard practices around confidential file sharing and the “need to know” also apply to file sharing on Teams and Ally. (20 ILCS 505/35.1). If it is not something you could or would share in person, it should not be shared via Teams or Ally.
- b) Case record. Ally is a communication tool and not the Department's case management system of record and there is no integration between it and the system of record. Any communications or observations made or shared in Ally requiring documentation per other Department Rules and Procedures shall be documented in the official case record.
- 1) As a co-owner of an Ally team, it is critical for caseworkers to remember, the historical record of all activities including chats and recorded meetings within Ally are archived and may only be accessed for review when there are concerns for a youth's safety. If a Teams user deletes or edits a chat in Ally the original, unedited, and undeleted chat is still stored in the archive. Meetings and calls are only archived when recorded.



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- 2) All significant case related content including contacts made and files and photos shared, gathered, or identified in Ally shall be added to the official DCFS case record within 48 hours.
  - A) Caseworkers shall document and transfer significant case related communications and images that occur in Ally into the Department's record management system within 48 hours.
  - B) The caseworker shall ensure each signed **CFS 2034**, **CFS 600-3**, and **CFS 2051** is recorded and stored in the official DCFS case record within 48 hours of receiving them.
- c) Case transfer. If an assigned case is to transfer to another caseworker or supervisor:
  - 1) The current caseworker or supervisor shall add the new or receiving caseworker and supervisor as an Ally team member, then change the role setting of their receiving equivalent, from "member" to "owner," under the "Member/Guest" section in the Ally team.
  - 2) When a youth's case is being transferred and the sending caseworker or supervisor is the owner of a private channel prior to case handoff, the sending caseworker or supervisor shall add the new team owners (the receiving caseworker and supervisor, or both) to all existing private channels. In this exchange, newly assigned caseworkers and supervisors have access to the Ally chat history in each channel owned by the previous caseworker or supervisor.
  - 3) The former caseworker or supervisor can then leave the alliance after the new ownership is established allowing the caseworker and supervisor the option to remain on the Ally team during the transition.
- d) Case closure:
  - 1) When a Permanency or Intact Family case closes, the youth's Ally team and their channel communications will remain in DCFS Microsoft Teams until deleted.
    - A) All files and photos stored in a youth's team shall be properly documented and stored in the case record before the case is closed and before the youth's team is deleted. Only the final or signed versions of files need to be stored in the case record.
    - B) During the six-month period after case closure, the youth and families may continue to use their Ally Teams channel.
    - C) When a youth's Ally team is deleted, all channel communication and content also will be deleted.

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**PART C: TRAINING AND OPERATING ALLY-IL AND TEAMS**

**Section 33.110 Ally Team Creation**

- a) When a caseworker enters a youth, parent, or caregiver's email address into the youth's DCFS electronic storage person management record at case opening, an Ally team for the youth is automatically created in Microsoft Teams within 24 to 48 hours.
  - 1) The caseworker and supervisor are automatically the co-owners of the youth's team.
  - 2) The name for each team will be DCFS.Y.YouthFirstName.LastName.
  - 3) If a youth's middle name is provided, the middle initial will be added to the team name (DCFS.Y.YouthFirstName.MI.LastName).
  - 4) If there is more than one youth with the same name in the Department's case record system, a next generation number (DCFS.Y.YouthFirstName.LastName2, etc.) will be added to the end of the successive Ally team names.
- b) Onboarding, updating, and removing alliances using "Manage Team" function:
  - 1) To onboard an alliance to a youth's Ally team the caseworker can add the alliance's personal or work email address, whichever is most appropriate, into Microsoft Teams through the Ally team's dashboard, Microsoft Teams > Manage Team.
    - A) Members will appear on the Ally team as "Member."
    - B) Guests will appear as "Guest."
      - i) When onboarding a guest that is serving in their professional capacity, such as a therapist, teacher, or attorney, it is appropriate to use their work email address.
      - ii) When onboarding a guest that is not joining the team in their professional capacity, such as a caregiver or family support, it is appropriate to use their personal email.
  - 2) Caseworkers and their supervisors can add or remove alliances to or from an Ally team using the "Manage Team" function.
  - 3) Owners can make updates to the Ally team or to a guest's email address through Microsoft Teams > Manage Team.

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- c) Once identified and invited to participate as an alliance, both members and guests will receive electronic notice.
  - 1) Invited members will be notified of being added to an Ally team via an email sent from the assigned caseworker or their supervisor.
  - 2) Invited guests will receive an invitation to join an Ally team via email from Microsoft Teams with prompts to install Microsoft Teams on their personal device. Once Microsoft Teams is installed, guests can follow the prompts to join the youth's team.

**Section 33.120 Meetings, Locating Alliances, Communication, and Creating a Staff Team**

- a) Meetings can be initiated by a member through the Teams calendar.
  - 1) Invitees will receive an email from the initiating alliance with the option to confirm attendance by accepting or declining the invitation.
  - 2) Once accepted, the meeting is automatically added to the invitee's default calendar, and they can join a scheduled meeting via the link in the original email invite or from their calendar.
- b) Locating alliances:
  - 1) DCFS and private agency Microsoft Teams users can search and locate any member by their last name or first name or a guest by their email address.
  - 2) Ally has special controls and limitations that prevent guests from searching or locating persons that are not on their team. (e.g., a youth that knows another youth through a shared placement or the local youth advisory board cannot search for or initiate contact with them using Ally.)
- c) Communication. All activity within Ally meets the Department's security requirements to protect Department staff and data.
  - 1) Youth and alliances can initiate one on one chats with the caseworker or any other person on the team and can also start a "group chat" with multiple alliances.
    - A) Access to the chat conversations and content within an Ally team is limited to the applicable members of that team.
    - B) Caseworkers will not have access to private chats between youth and their alliances.

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- 2) When someone chats or @mentions a guest in a channel conversation, the guest receives an automated notification and an email from Microsoft Teams.
- 3) Ally maintains a complete chat history in one place, allowing for quick review of content and continuation of discussions where previous conversations ended.
  - A) Team chats between current and previous alliances cannot be deleted by the alliances but can be hidden (see Ally FAQs of Dnet for more information).
  - B) All channel and chat communications automatically archived.
  - C) Original, edited, and deleted chat content retained in this archive remains accessible only to Department personnel with authorized access, permissions, and a documented “need to know” (e.g., DCFS Office of Legal Services or Office of the Inspector General).
- 4) Some activity and content that occurs in Teams and Ally is archived and only is available to the specific staff with authority to request access to that information.
  - A) Teams information that is archived includes:
    - i) All chats; including individual, group and meeting chats. If an Ally team participant deletes or edits a chat, the original undeleted or unedited chat is still stored in the archive; and
    - iii) Photos when included in a chat
  - B) Teams information that is not archived includes:
    - i) Files; and
    - ii) Meetings and calls made in Ally are only retained for 60 days.
  - C) Requested Ally records shall only be disclosed in accordance with **Rule 431** and **Procedure 431** or in accordance with a valid court order or subpoena. See **Section 33.30**.

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- 5) If an alliance shares any document containing confidential information in a private channel:
  - A) Data loss prevention (DLP) software will tag the document.
  - B) The sender will receive an automated notification via email that the document contains sensitive information such as Personal Identifying Information (PII), a social security number, etc.
  - C) The system will require the sender to enter a business justification to release the information.
  - D) This information is also captured as part of the audit logging process.
- d) Creation of a Staff Team:
  - 1) To create a Microsoft Team for staff, a supervisor (or higher level manager) shall complete the [Create Microsoft Team](#) form (available on D-net), and submit the form.
  - 2) The requesting supervisor or manager will be the team owner and can add a co-owner and team members after the team is created.
  - 3) The requesting supervisor or manager will be notified via DCFS Outlook email when the team has been created.

**Section 33.130 Learning to Use Microsoft Teams and Ally-IL and Required Training**

- a) The most effective method to learn how to communicate through Teams is to use it. Supervisors can help their staff learn to use Teams by creating a team for their staff, and to begin using Teams to communicate with them. By doing so, both supervisors and caseworkers will quickly learn to use and navigate the Microsoft Teams features.
- b) Teams is integrated with Microsoft Office 365 products licensed by the State of Illinois. All DCFS and private agency staff should complete the Microsoft Teams and Ally on-demand training to become familiar with Teams features and to use Teams as the preferred platform.

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- c) Microsoft Trainings:
  - 1) [On-demand Microsoft Teams level 100 training](#) and Ally-IL on-demand training is available on the training portal for DCFS and private agency staff, foster parents and caregivers.
  - 2) There are many online resources that can help Intact Family and Permanency caseworkers and supervisors become familiar with Microsoft Teams. Most users prefer [2-3 minute video tutorials](#).
  - 3) Microsoft Teams learning resources are available on the D-Net.
- d) Required Caseworker Training: The trainings listed below, available on One-Net, apply to the use of Ally. DCFS and private agency staff shall ensure that they complete this training annually. Log-in instructions are posted periodically in D-net Announcements.
  - 1) HIPAA & Privacy Training
  - 2) Security Awareness
  - 3) Acceptable Use Policy (AUP)
- e) Frequently Asked Questions

[A list of frequently asked questions is available on the DCFS website and D-Net.](#)

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<sup>i</sup> *Overview of teams and channels in Microsoft Teams*, April 11, 2022  
<https://docs.microsoft.com/en-us/microsoftteams/teams-channels-overview>

<sup>ii</sup> *Private channels in Microsoft Teams*, April 12, 2022  
<https://docs.microsoft.com/en-us/microsoftteams/private-channels>