

REPORT ADOPTION GUIDE ENRICH LOCAL PROTECT CHANGE COMPASSION UPLIFT ACT HEAL

CASA FOR THE CHILD

TRUST EMPOWER PARACHUTE COUNSEL INSPIRE HOPE UNDERSTAND VOLUNTEER

ENCOURAGE RESTORE BRIGHTER FUTURES COURT APPOINTED SPECIAL ADVOCATES BUTLER COUNTY NURTURE GIVE MONITOR OHIO FOSTER LISTEN HERO LEARN SPEAK CARE LOVE

Impact & Effectiveness



CasaManager and
Casa Connect can help
your program show
impact and
effectiveness!!

Agenda

- Data Review Dashboard
- Reports Favorites
 - Quick Count Drill Down
 - Program Stats Report
- Integrated email feature
- CasaConnect for volunteers

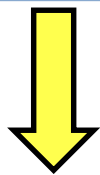
Data Review Dashboard



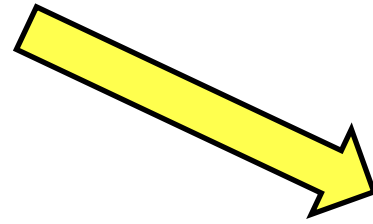
Data Review

			Staff	Family/Child	Casework	Facility/School	Inserv/Outreach	Professionals	Volunteers	Reports
			Quick Counts	All Reports	Custom Reports	Mix and Match	Report Archive	Data Review Dashboard		
								Issues Only	Refresh All	Select Module...
Agency data issues										
All Good Here!			Agency fiscal year dates ERROR (Agency)							
Casework data issues										
All Good Here!			Case Outcome field is empty (Casework)							
All Good Here!			Case Outcome field is empty, may be Never Served (Casework)							
All Good Here!			Case ID field is empty for Child Hearing (Casework)							

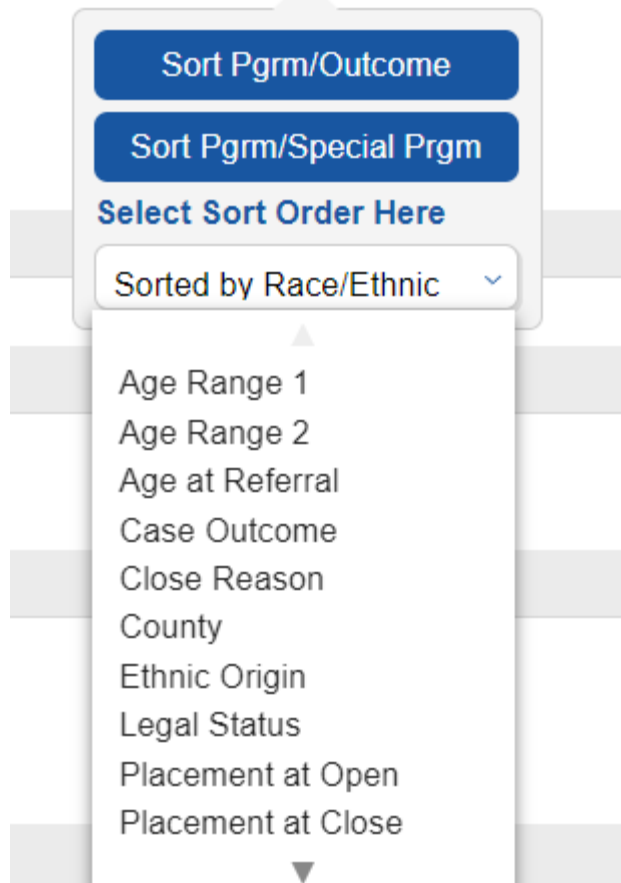
Report Features



By selecting “Sort Options”, you will have several options to sort and calculate a variety of commonly used data fields.



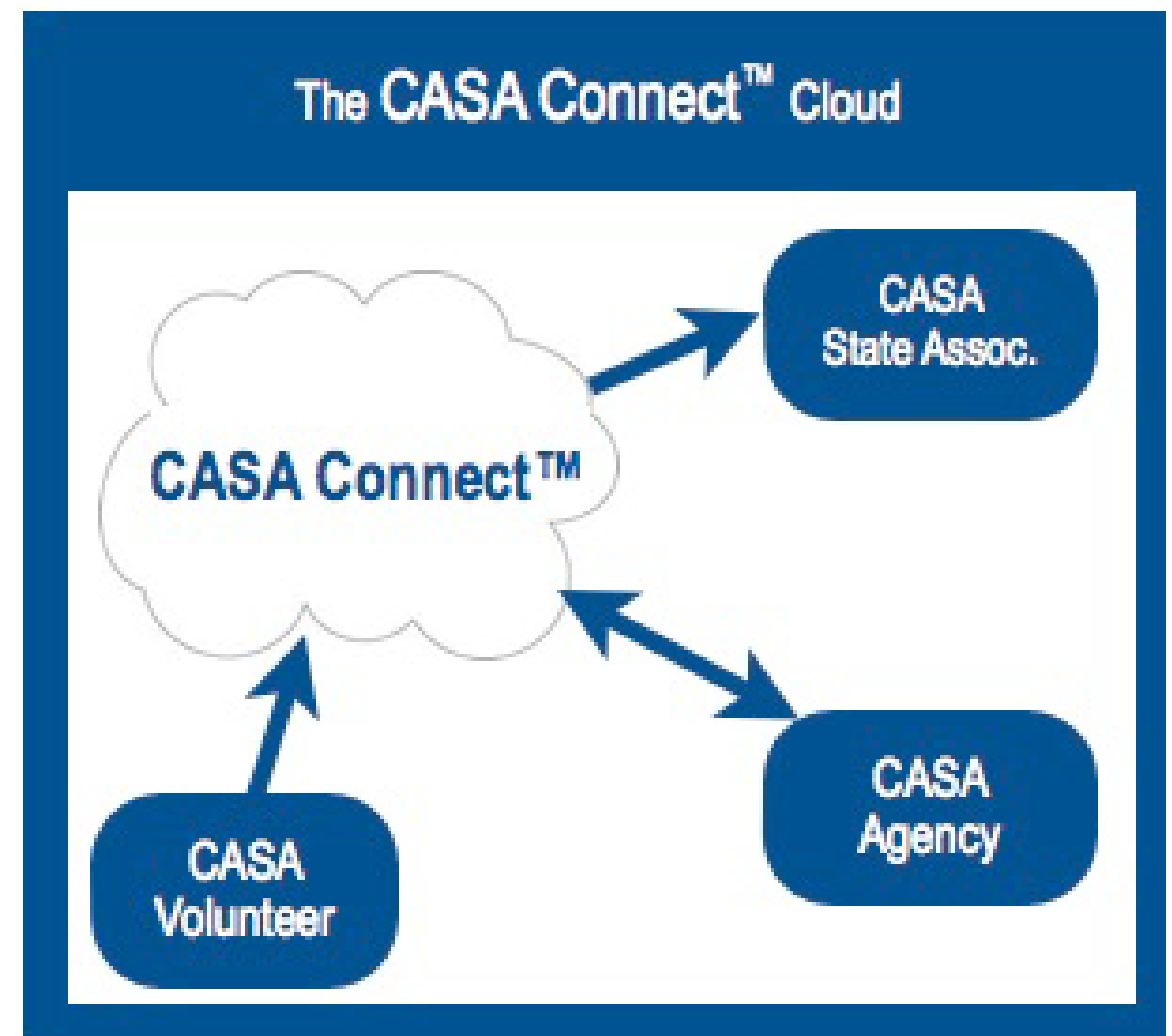
By selecting “View Case List” you will be able to see data that is being calculated in counts.



There are over 20 Reports in CasaManager. To save time, make sure to mark your “Favorite” reports by clicking the star to the left of the report title. Your favorite reports will then show up under “Favorites”

CasaConnect

- Convenient for volunteers
- Use a smart phone, tablet or computer
- Submit hours, case notes, see next court date, professionals, placement information and view case documents.
- Secure since no confidential data is stored



CasaConnect

- ❑ Set up a user account for you and become comfortable with CasaConnect. Some of your CASA volunteers will have questions and you should expect to provide some assistance initially.
- ❑ Assess CasaConnect features you would like your CASA volunteers to access. You decide what they can see and what they can change!!
Customize→Agency Level Preferences → CC Volunteer Portal
Just like for staff...you decide which tab panels volunteers can see and which they can edit/update!!

The screenshot shows the 'Agency Preferences' window with the 'CC Volunteer Portal' tab selected. The main heading is 'CasaConnect Volunteer Portal App Settings'. On the left is a sidebar menu with options: Welcome, My Cases (selected), Hours/Notes Entry, VOCA Services Entry, Measures, Supervised Visits, My Account, Agency Info, Reports, Activation Message, and Users. The main content area explains the 'My Cases' feature and provides a table of settings for various portal elements.

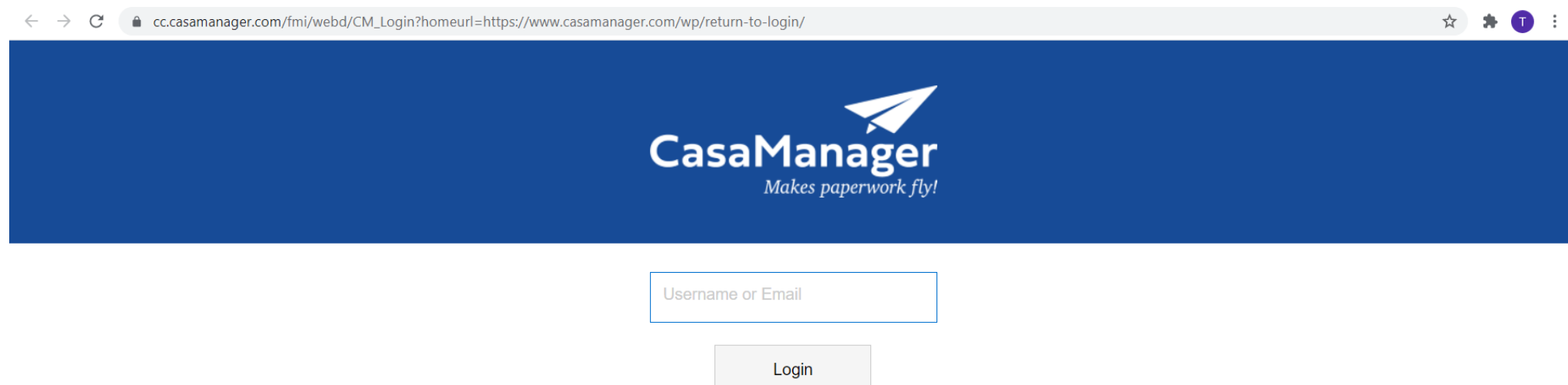
	Hide/Show	Add New	Editable
My Cases: <input checked="" type="checkbox"/>	<input type="checkbox"/>		
Hide Closed Cases: <input type="checkbox"/>			
Case/Child Background	<input type="checkbox"/>		
Current Child Professionals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Hearings	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hours	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Placements	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education >	<input type="checkbox"/>		
Health >	<input type="checkbox"/>		
Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Services >	<input type="checkbox"/>		

At the bottom left, there are two PDF icons: 'Save as Family Documents' and 'Save as Case Documents'. At the bottom right, there are three buttons: 'Use Preset', 'Cancel', and 'Submit'.



Logging in is Easy

1. Each volunteer will receive an email with a secure log in.
2. Enter your email for both the log in and password the first time
3. Enter your own unique password



A screenshot of a web browser showing the CasaManager login page. The browser's address bar displays the URL: cc.casamanager.com/fmi/webd/CM_Login?homeurl=https://www.casamanager.com/wp/return-to-login/. The page features a dark blue header with the CasaManager logo, which includes a paper airplane icon and the tagline "Makes paperwork fly!". Below the header, there is a white input field labeled "Username or Email" and a grey "Login" button.

CasaConnect – Home Screen




CasaConnect Dashboard

My Cases

Hours/Notes Entry

My Account

Reports

	Case (Brantson Case) Supvr: Tonya Buchanan	>
	Case (Savannah Case) Supvr: Tonya Buchanan	>
	Case (Elizabeth Case) Supvr: Tonya Buchanan	>

Show closed cases



My Cases

Hearings will show all scheduled hearings correct, PLEASE contact your supervisor.


Hours – you can enter case hours

Notes – you can enter notes. (Family)


Placement info will show...this is not able to be edited. If not correct, PLEASE contact your supervisor.

Documents – Any scanned documents will show for you to review or you may upload documents to save to the record.


Case Detail



Case (Elizabeth Case)
Supvr: Tonya Buchanan



Jul 29, 2020 (1 yrs)
Date of Birth



5/5/2022 @ 9:30am
Adjudication/In person
John Bruewer/Courtroom B
CR Due: 4/21/2022
Next Hearing

Current Child Professionals (3)

+

Hearings (1)

Hours (3)

+

Notes (2)

+

Placements (1)

Documents (10)


+


Hearings


All scheduled hearings will show.

* Tip – if you click on the individual court hearings, it will show when your court report is due. A due date will show for all hearings! Court reports are typically not needed for Shelter Cares. If unsure, please contact your supervisor.

Case Detail

**Case** (Elizabeth Case)
Supvr: Tonya Buchanan

Jul 29, 2020 (1 yrs)
Date of Birth

4/6/2022 @ 9:30am
Adjudication
John Bruewer/Courtroom B
CR Due: 3/23/2022
Next Hearing

Current Child Professionals (3) +

Hearings (2)

Hours (3) +

Notes (2) +

Placements (1)

Documents (10) +


Wednesday, Apr 27, 2022 @ 1:30pm >
Disposition - Family Hearing - Honorable Bruewer, John

Wednesday, Apr 6, 2022 @ 9:30am >
Adjudication - Family Hearing - Honorable Bruewer, John


Volunteer Case Hours

Hours – you will see entered hour to the right. To enter new hours, you can click the + icon next to the hours button.

Case Detail




Case (Elizabeth Case)
Supvr: Tonya Buchanan



Jul 29, 2020 (1 yrs)

Date of Birth



5/5/2022 @ 9:30am
Adjudication/In person
John Bruewer/Courtroom B
CR Due: 4/21/2022

Next Hearing

Current Child Professionals (3)

+

Hearings (1)

Hours (3)

+

Notes (2)

+

Placements (1)

Documents (10)

+

Volunteer Case Hours

CasaManager x Mail - Tonya Buchanan - Outlook x Return to Login | CasaManager™ x CasaConnect Entry x +

cmcloudohio3.casamanager.com/fmi/webd/Volunteer?homeurl=https://www.casamanager.com/wp/back/&script=Startup¶m=O11KUTouTJqCzLhw9G3zfcCFMTuWMI

Case Related Hours Entry

Date	<input type="text"/>
Hours	<input type="text"/>
Type	<input type="text"/>
Activity	<input type="text"/>
Inkind \$	<input type="text"/>
Mileage	<input type="text"/>
Visits	<input type="text"/>
Contacts	<input type="text"/>
Signed*	<input type="checkbox"/> Marking this box, I certify that this information is true and accurate. Once checked/submitted, this record may not be edited.

Enter #1 for Visits. This is only used for **visiting** your CASA kids

Enter # of children visited under #Contacts

If you talk with anyone else on the case, enter #prof Contacts, NOT visits.

Cancel


Submit

Adding Child Visits

CasaManager x Mail - Tonya Buchanan - Outlook x Return to Login | CasaManager™ x CasaManager - 2 (cmOhio3) x +

← → ↺ cmcloudohio3.casamanager.com/fmi/webd/Volunteer?homeurl=https://www.casamanager.com/wp/back/&script=Startup¶m=O11KUTc

Case Related Hours Entry

Date	6/9/2021	
Hours	2	
Type	Face-to-Face	
Activity	Child	
Inkind \$		
Mileage		
Visits	1	
Contacts	3	
Signed*	<input type="checkbox"/> Marking this box, I certify that this information is true and accurate. Once checked/submitted, this record may not be edited.	

Only use the visit field when seeing your CASA Children. (In this example, the CASA had one visit with 3 children. You will complete another entry for foster parents, relatives or treatment staff.

Please make sure to click the “Signed” Box after each entry.

Time is entered:

15 minutes	.25
30 minutes	.50
45 minutes	.75
1 hour	1.00
90 minutes	1.50
Etc.	

Cancel

Adding Child Visits

Case Related Hours Entry

Date 6/9/2021



Hours 0

Type Face-to-Face

Activity Foster parents

Inkind \$

Mileage

Visits 0

Contacts 2

Signed* ☐ Marking this box, I certify that this information is true and accurate. Once checked/submitted, this record may not be edited.

This is the second half of the entry documenting who you visited the child(ren) with.


Enter 0 hours since your hours are included with the children!

Sample Volunteer Hours Entries

Date	Hours	Type Only select from drop down list	Activity	Visits (Only for child visits)	Contact
2/3/22	2	Face to face	Child	1	3
2/3/22	0	Face to face	Relatives	0	1
2/5/22	1.25	Virtual	Court	0	3
2/8/22	.50	Email	Collaterals	0	3
2/9/22	.25	Phone	PARACHUTE Staff	0	1
2/12/22	.75	Virtual	Child	1	2
2/12/22	0	Virtual	Relatives	0	2
2/15/22	.25	Phone	Biological Parents	0	1
2/18/22	.75	Face to face	Educational		

Hours Entry Screen

Independent Training

Date	2/3/2022	
Hours	2	
Type	Seminar	
Topic	FTDC - Improved services for parents	
Paid		

Use drop-down lists for Type

Do NOT enter PARACHUTE InServices!

Click to submit training hours

Reports

CasaConnect Dashboard

My Cases

Hours/Notes Entry

My Account

Reports

Enter a date range and click the report type to run:

Date Range

1/1/2022



-

3/1/2022



Hours Report

Mileage Report

Notes Report

Reports

/olunteer?homeurl=https://www.casamanager.com/wp/bac

Select cases below by clicking the child name

You can filter the case list below to show only active cases, or all cases to which you have been assigned

☒ [My Active Cases](#)

[All My Cases](#)

Select All

Clear All Selected

Arvin, Brantson	Active Vol
Arvin, Elizabeth	Active Vol
Arvin, Savannah	Active Vol

Select all children—Continue

Hours Report

Date Range: 1/1/2022 - 3/1/2022

Printed by: Tonya Buchanan

Sign All

Date	Type	Description	Hours	Miles	Visits	In-kind Amt	Signed
Case Hours			7.75	0	2	0	
Case , Elizabeth (child ID: 6258)							
2/1/2022	Phone	Collaterals	.25	0	0	0	<input checked="" type="checkbox"/>
2/1/2022	Email	Collaterals	.5	0	0	0	<input checked="" type="checkbox"/>
2/3/2022	Face-to-Face	Child	2	0	1	0	<input checked="" type="checkbox"/>
2/3/2022	Face-to-Face	Foster parents	0	0	0	0	<input checked="" type="checkbox"/>
2/3/2022	Written	Wrote reports	1	0	0	0	<input checked="" type="checkbox"/>
2/8/2022	Other	Other	2	0	0	0	<input checked="" type="checkbox"/>
2/10/2022	Face-to-Face	Child	2	0	1	0	<input checked="" type="checkbox"/>
2/10/2022	Face-to-Face	Biological parents	0	0	0	0	<input checked="" type="checkbox"/>
Totals:			7.75	0	4	0	

A word about case notes...

- Enter notes for an entire family group
- Unlimited text entry
- Copy and paste from emails and/or documents
- Save encrypted to ensure privacy



Questions?



By using CasaConnect
you save time and help
our agency support more
children and families.