CasaManager Knowledge Anchor:

FAMILY/CHILD NAVIGATION:

Where do I go to add a new family and children?_____

Where do I go to add a new hearing to a child's record?_____

Where do I go to update children's placements?_____

Where do I go to update case notes/contacts? _____

Where do I go to update education data?_____

Where do I go to update health data?_____

Where do I go to flag children as VOCA? _____

Where do I go to add VOCA Services to children's records? _____

Where do I go to assign or discharge volunteers? _____

Where do I go to add documents to children's records?_____

Where do I go to provide intake forms for volunteers?_____

How do I perform a quick find for my caseload?_____

Where do I go to relist a case that has come back?_____

Where do I go to export data into Excel?_____

Where do I go to find recordings from training sessions?_____

What are the 20 underutilized workflows that Gina highlighted?_____

VOLUNTEER NAVIGATION:

Volunteer Statuses and Codes

What is the color and code for a volunteer who is actively working on a case?_____

What is the color and code for a volunteer in Training?_____

What color and code would an advocate be who was discharged from a case?_____

What color and code are people who recently called your agency for information?_____

You need a list of all advocates who are available to take a case. You'd search for:____

You are hosting an open house/orientation. In this case you would search for?_____

What codes of a volunteer prevent you from assigning them to a case?_____

How can you override the computer and immediately code them as RED?_____

REPORTS:

How can I find out how many active volunteers I have?_____

How can I find children between the ages of birth to 5?_____

How can I find my active caseload?_____

How can I find my upcoming hearings?_____

How can I find where my CASA children are placed?_____

How can I find my list of waiting kids?_____

What can I glean from Quick Counts?_____

How can I find and fix missing or bad data in my database?_____

What can I do in Mix & Match?_____

How can I build a custom report?_____

EXTRAS:

Where can I create custom forms and letters?_____

Where can I find a sign in sheet for volunteers?_____

How do I print training certificates?_____

How do create and assign tags?_____

How can I use the site map?_____

Where can I create reminders?_____

How do I update children's professionals?_____

How can I track children's health appointments?_____

Where can I find data entered by volunteers?_____

CHILD AND CASE DETAIL NAVIGATION:

Understanding Dates and Current Status on the Child's Record

There are six (6) important dates in CasaManager that you need to fully understand. Entering dates into these fields will drive the statistical outcomes that will be reflected on compliance reports. To ensure you are accurately entering dates correctly, please read below.

The Child's **Current Status** is based on the dates entered into the database. The dates entered will also determine whether or not a Volunteer Advocate or a paid Staff Advocate served the child.

Date of Original Petition

This is the date of the original/first petition when the child became a dependent of the court per the court document. In CasaManager this field label reads: *Date Orig Pet.* and is located on the Child Detail Navigation.
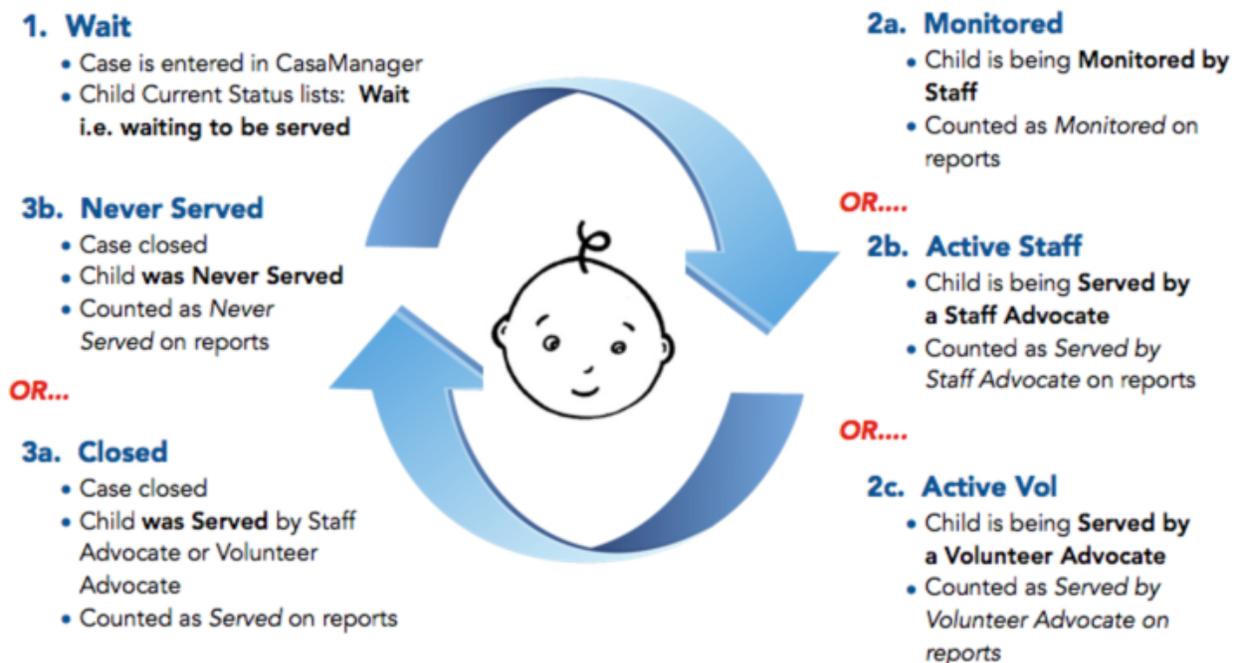
Date Referred

This is the date the court sent the Order of Appointment paperwork over to the CASA/ GAL Agency. This is the date the court asked you to try to serve the child either by a

Wait to Monitored	1. Open case, monitored by Staff Note: Cases with a date in the Date Opened field will be included in Stats as 'served monitored'	Status = **Monitored**
Monitored to Wait	2. Revert from Monitored to Wait	Status = **Wait**
Assign to Staff	3. Open case, Serve with Staff Advocate	Status = **Active Staff**
Assign to Volunteer	4. Open case, Serve with Vol Advocate	Status = **Active Vol**
Remove Advocate	5. Remove all Staff or Vol Adv, return to wait list **Remove all Staff or Vol Adv, return to Supvr** **Remove 1+ Adv, but leave 1 Adv**	Status = **Wait** Status = **Monitored** Status = **Active Vol**
Close Case	6. Close case, discharge Advocate/s **Close case, no Advocate**	Status = **Closed** Status = **Never served**
Return/Re-Open case	7. To re-open a closed case, Click the "show closed cases" X box, then select.	Status = **Wait**

Volunteer Advocate or a paid Staff Advocate. Until a Volunteer Advocate or a paid

Child Status — Cycle of Service

1. Wait
- Case is entered in CasaManager
- Child Current Status lists: **Wait**
  i.e. waiting to be served

3b. Never Served
- Case closed
- Child **was Never Served**
- Counted as *Never Served* on reports

OR...

3a. Closed
- Case closed
- Child **was Served** by Staff Advocate or Volunteer Advocate
- Counted as *Served* on reports

2a. Monitored
- Child is being **Monitored by Staff**
- Counted as *Monitored* on reports

OR....

2b. Active Staff
- Child is being **Served by a Staff Advocate**
- Counted as *Served by Staff Advocate* on reports

OR....

2c. Active Vol
- Child is being **Served by a Volunteer Advocate**
- Counted as *Served by Volunteer Advocate on reports*

Staff Advocate has been assigned to the case, the Child's status will be: **Wait**—i.e. waiting to be served.

Date Opened

This is the date the Agency starting serving the child either with a Volunteer Advocate or a paid Staff Advocate. CasaManager counts children who have a date in the Date Opened field as: **Served**.

Reporting Calculation Advisory:
*If you enter a date into the **Date Opened** field, when there is no paid Staff Advocate or Volunteer Advocate assigned, CasaManager will automatically set the status as* **Monitored** *by Staff.*

*Any record that has a date entered in **only** the Date Opened field but no date assigned to a volunteer or staff will be included on statistical reports as Monitored by Staff.*

Do not put a date in the Date Opened field unless and until you want the child to be counted as Monitored for statistical purposes.

If your Agency never serves children with anyone other than a Volunteer, the Date Opened field will stay empty UNTIL the Agency assigns a Volunteer to the child. The status of the child in this case will be: **Wait**.

When you do assign a Volunteer Advocate or a paid Staff Advocate, the Date Opened and the Date Assigned **can** be the same. *This is agency-specific.

Date Assigned

This is the date the child was assigned a Volunteer Advocate i.e.: is being served by a Volunteer. The status of the child will be: **Active Vol.**

Date Discharged (formerly Date Resigned)

This is the date the CASA Volunteer was discharged from the case either before the case was closed or at the time of case closure. *A Staff Advocate will have a Date Assigned and a "Date End" (vs discharged)*

Advisory: In older versions of CasaManager this field is called "Date Resigned." The word "resigned" confused people. Please do not be confused by the

terminology. Resigned simply means that the CASA Volunteer was discharged from the case.

Date Closed

This is the date the Agency closed the case for one of two reasons: 1. because the court closed the case; or 2. because they have elected to terminate CASA services to the child for some reason.