



WELCOME NEBRASKA CASA STAFF!



CasaManager
Makes paperwork fly!



So Many Things I Wish I'd Known About CasaManager, But Didn't!

Thank you all for participating in this training to learn about **some** of the forgotten workflows, features, and functions in CasaManager.

This training is ideal for all staff.

As we move through the training, I encourage you to ask questions.



So Many Things I Wish I'd Known About CasaManager, But Didn't!

Objective:

The objective of this session is to help staff fully utilize **some** of the tools and features available in CasaManager.

There is a gold mine of information in here. There are features for every staff position in this refresher. No matter what your job function is, I encourage you to try some of the helpful tools.

Work smarter and more efficiently!



ABOUT THE FACILITATOR

My name is Gina A. James

- 25 years of experience in CASA/GAL agencies.
 - Program manager for child abuse and neglect.
 - Urban and rural communities.
 - CasaManager evangelist and power user for 23+ years.
 - CasaManager, Volunteer Portal, VisitationManager, and MentorManager expert and staff trainer.
- 



First Things First: Data Integrity and Accuracy!

Double Impact of Data Accuracy (and Inaccuracy)


Impact #1: **Your** program data and reports

Impact #2: Nebraska CASA **state level** data and reports

What can **you** do?

1. Remember that you are all **each other's customers!** Let's explore that...
2. Utilize the **Data Review Dashboard** to easily find and fix your inaccurate data.

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...

Casework data issues

 All Good Here!	Case is Closed with a Placement without an End Date (Casework)	
 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!	ChildID and Case ID on Re-abuse Records (Casework)	
 All Good Here!	Close Reason field is empty (Casework)	

DATA REVIEW DASHBOARD




























Data Review

Navigation: Staff | Family/Child | Casework | Facility/School | Inserv/Outreach | Professionals | Volunteers | **Reports**


Sub-navigation: Quick Counts | All Reports | Custom Reports | Mix and Match | Report Archive | **Data Review Dashboard**

Actions: Show All | Issues Only | Refresh All | Select Module...

Casework data issues

 1 affected record	Days Waiting is less than 0. (Casework)				
 1 affected record	Date Opened before Date Referred (Casework)				
 1 affected record	Hearing Date / Time is empty (Casework)				
 3 affected records	Hearing Type is empty (Casework)				
 5 affected records	Supervisor ID field is empty (Casework)				

DATA REVIEW DASHBOARD





















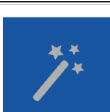






Data Review

Navigation: Staff | Family/Child | Casework | Facility/School | Inserv/Outreach | Professionals | Volunteers | **Reports**

Sub-navigation: Quick Counts | All Reports | Custom Reports | Mix and Match | Report Archive | **Data Review Dashboard**

Actions: Show All | Issues Only | Refresh All | Select Module... (dropdown)

Volunteers data issues

 3 affected records	County field is empty (Volunteers)	   
 72 affected records	Duplicate Email Address (Volunteers)	   
 7 affected records	Duplicate Volunteer Name (Volunteers)	   
 1 affected record	Gender field is empty (Volunteers)	   
 3	Language field is empty (Volunteers)	   

- All Modules
- Agency
- Casework
- Child
- Facility
- Family
- Profs
- Reports
- School
- Staff
- Volunteers



Block #1:

All About Volunteer Recruitment, Screening, and Training!





All About Volunteer Recruitment, Screening, and Training!

Segment #1: Recruitment Data

Segment #2: Screening Data

Segment #3: Training Data

What can **you** do?

1. Enter all required data.
2. Ensure the data is accurate.
3. Check your work!



All About Volunteer Recruitment, Screening, and Training!

Segment #1: Recruitment Data

- a. Recruitment Blue Bar Navigation (Inservice/Outreach)
- b. Inquiry Info Tab (Volunteer Detail)
 - i. Outreach/Recruitment Tracking

****Why is this important?***

- c. Applications (manual or automated)
- d. Demographic Survey Tab

*This data feeds into major reports
(NCASA/GAL Annual, 6-Month, VOCA, Prog. Stats)

All About Volunteer Recruitment, Screening, and Training!

Inquiry/Info Tab

Inquiry Info	Personal	Demographic Survey	Child Match	PeerCoord. Cases	Vol Cases	Vol Notes	Misc. Fields	Vol Documents	Vol Tags	Webform Data
Outreach/Recruitment Date of Inquiry: 3/6/2024 <input type="checkbox"/> Female Initial How Heard?: Local News Sub Category: KKTV How Spec.?: Community Spotlight		Non-Advocate Volunteer Type (NAV) Edit List <input type="checkbox"/> Admin Volunteer <input type="checkbox"/> Case Monitor <input checked="" type="checkbox"/> Donor <input type="checkbox"/> Intake Volunteer <input type="checkbox"/> Mentor <input type="checkbox"/> Adv Trainer <input type="checkbox"/> Circle of Impact <input type="checkbox"/> Educational Surrogate <input type="checkbox"/> Intern <input type="checkbox"/> Office Ang <input type="checkbox"/> Advisory Council <input type="checkbox"/> Court Coverage <input type="checkbox"/> Fundraising <input type="checkbox"/> Life Long Links <input type="checkbox"/> SEPT Acti <input type="checkbox"/> Board Member <input type="checkbox"/> Courtesy Serv. <input type="checkbox"/> Home Visits <input checked="" type="checkbox"/> Light of Hope <input type="checkbox"/> SEPT Inac					Comments <div style="border: 1px solid #ccc; height: 80px;"></div>			
+ Add Outreach Click 'Select' if volunteer heard from an outreach event		Enter 'How Heard' info about the Outreach effort					Total Outreach: 3			
Outr. ID	Date	Initiated By	Type	Topic	How Heard	How Heard Sub Category	How Specifically?	Outreach Status		
74	5/20/2024	<input type="checkbox"/>	Vol-Specific Recruitment	San Mateo Rec	Local News	KRDO	Totally Colorado Segment	Interested <input type="checkbox"/>		
73	2/20/2024	<input type="checkbox"/>	Community Resource Volunteer Recruitment Fair		Event	El Pomar Foundation	Non-Profit Day	RSVP to 411 <input type="checkbox"/>		
64	7/24/2023	<input type="checkbox"/>	Vol-Specific Recruitment	Volunteer Recruitment	Advertising	City Bus/Bus Stop/Bench	Front Range Transit System	No Time <input type="checkbox"/>		



All About Volunteer Recruitment, Screening, and Training!

Segment #2: Screening Data

a. Interview Tab

- i. Helps you do initial vetting
- ii. Helps you understand the applicant
- iii. Helps you determine which cases are or are not appropriate, if accepted

b. Screening Tab

- i. Provides space for you to collect additional screening data

All About Volunteer Recruitment, Screening, and Training!

Interview Tab

Interview	Screening	Pre-Service Training	FosterFutures / History	In-Service Training	Book Library	Tape Library	Independ									
<p>Interviewer</p> <table border="1"><tr><td>Interviewed by</td><td>James, Gina</td><td><input checked="" type="checkbox"/> View Interview Form</td></tr><tr><td>Willing to Travel To</td><td>Denver, Pueblo, Way Out East</td><td></td></tr><tr><td>Interview Date</td><td>2/20/2019</td><td><small>Note: Enter interview date on Pre-Service tab panel</small></td></tr></table> <p>Strengths</p> <p>Strong written and oral skills. Keith is an educator and knows how to navigate the educational system. He is skilled at working with children. He has dealt with DHS on cases of abuse in his</p> <p>Weaknesses</p> <p>N/A</p> <p>Any History of Abuse? <small>If yes, how long ago, what type, by whom? Received counseling?</small></p> <p>None</p>	Interviewed by	James, Gina	<input checked="" type="checkbox"/> View Interview Form	Willing to Travel To	Denver, Pueblo, Way Out East		Interview Date	2/20/2019	<small>Note: Enter interview date on Pre-Service tab panel</small>							
Interviewed by	James, Gina	<input checked="" type="checkbox"/> View Interview Form														
Willing to Travel To	Denver, Pueblo, Way Out East															
Interview Date	2/20/2019	<small>Note: Enter interview date on Pre-Service tab panel</small>														
				<p>Interests/ Skills</p> <p>School aged children between 7 and 14. He doesn't want cases with infants or toddlers. He'd prefer children/youth to whom he can talk</p> <p>Type of Cases <small>Indicate types of cases that are acceptable or not: #Children, Race, Distance, Gender, Age</small></p> <p>Any cases. Would love him to serve cases with educational issues.</p> <p>N/A</p> <p>Notes about the interview</p> <p>Sees all the notes from the interview right here!</p> <p>Gina and RoseMary accepted Keith into the Spring 2019 training class.</p>												

All About Volunteer Recruitment, Screening, and Training!

Screening Tab

Interview **Screening** Pre-Service Training FosterFutures / History In-Service Training Book Library Tape Library Independent Study

Insurance Information

Insurance Co. Allstate
Policy #
Expires on <input type="text"/>
Amount Paid (Optional)

Photo Dr License

SSN / Drivers License information

SSN # <small>Optional</small>
Driver Lic. # CO-123789-R
DL Expires 8/31/2024

Additional Screening Documentation [+ Add Screening](#)

Date	Type	Finding	
3/8/2024	<input type="checkbox"/> Social Media Agreement	Signed	<input checked="" type="checkbox"/>
3/4/2024	<input type="checkbox"/> Confidentiality Agreement	Signed	<input checked="" type="checkbox"/>
2/22/2024	<input type="checkbox"/> Policies and Procedures	Signed	<input checked="" type="checkbox"/>
2/12/2024	<input type="checkbox"/> Auto Liability Statement	Signed	<input checked="" type="checkbox"/>

Personal References

Full Name	Relationship	Phone	Email	Request Sent	Response Received
Gina James	Friend	(719) 000-0000	gina@casamanager.com		<input type="button" value="Send Request"/>
Lisa Lewiston	Niece	(717) 000-0000	lisa.lew@fakeemail.com		<input type="button" value="Send Request"/>
Dolores Langston	Coworker	(850) 000-0000	DLang@fakeemail.com		<input type="button" value="Send Request"/>



All About Volunteer Recruitment, Screening, and Training!

Segment #3: Pre-Service Training Data

- a. Pre-Service Training Tab
 - i. Training Qtr/Method
 - ii. Interview Data
 - iii. ***ALL Date Fields and Check Boxes Are Required!***
 - iv. Session Attendance

All About Volunteer Recruitment, Screening, and Training!

Pre-Service Training Tab

Interview Screening **Pre-Service Training** FosterFutures / History In-Service Training Book Library Tape Library Independent Study

Trainings: 1

1 Add Training

Value list below shows trainings in the last 60 days

Training Qtr/Method 2019 Spring

Interview 1 Date	2/20/2019	<input type="checkbox"/>
Interview 2 Date		<input type="checkbox"/>
Date Start	2/20/2019	
Date Sworn	2/22/2019	
Done/AOK	2/20/2019	

Photo CC Orientation

AOK Points 21

Total Hours 35.5 X [Post Hours](#)

Search for Training

Upon Completion Enter Date, Check Box

Info Session	2/6/2019	<input checked="" type="checkbox"/>	
Application Rec'd	2/7/2019	<input checked="" type="checkbox"/>	
SSN Verification	2/11/2019	<input checked="" type="checkbox"/>	Clear
Criminal Check	2/11/2019	<input checked="" type="checkbox"/>	Clear
Child Abuse Reg.	2/14/2019	<input checked="" type="checkbox"/>	Clear
Fingerprints	2/7/2019	<input checked="" type="checkbox"/>	Clear
Mandated Rpt	2/7/2019	<input checked="" type="checkbox"/>	Clear
Court Observ.	2/15/2019	<input checked="" type="checkbox"/>	
# Reference Ltrs	3		

Sessions / Attendance Tracking

Enter 1 for Attended, Y for Make Up, - for Missed.

[Delete Training](#)

1	Introduction to CASA
1	Abuse/Neg.
1	Cultural Div.
1	Child Dev.
1	Court Process
1	Role of CASA
1	Communicating
1	Report Writing
1	Interviewing
1	Jeopardy
	Mand.Rpt.
	Flex #1

Make ups

Inc. Knowledge? Satisfied?

Aha Revelations!





Aha Revelations!

Use this space to write down 3 to 5 things you learned in this block.



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Block #2:

All About Reports!



All About Reports! *Required for State Funding

- How many inquiries?
- How many people attended orientation?
- How many applications?
- How many people were interviewed?
- How many people started training?
- How many people completed training?
- How many people dropped out of training?
- How many recruitment events were there?
- How many people attended each event?



VOCA Data Entry and Reporting

- How to properly enter VOCA data
 - VOCA Grant Selection
 - VOCA Special Classification
 - VOCA Victimization
 - VOCA Services
 - VOCA Report Wizard
 - VOCA Report

Aha Revelations!





Aha Revelations!

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Block #3:

Let's take a stroll down memory lane!




Core Navigation Review and Q&A

Let's take a stroll down memory lane!

- How To Get Around in CasaManager
 - Hierarchy of Navigation
 - Top Level (Main Blue Buttons)
 - Second Level (Sub Navigation Buttons)
 - Active Panel (Light Blue)
 - Tabs

Core Navigation Review and Q&A

Hierarchy of Navigation



Casework Detail

Family ID	3
Child ID	4
Case ID	1100


Broadnax/Johnson

←	🏠	→	Staff	Family/Child	Casework	Facility/School	Inserv/Outreach	Professionals	Volunteers	Reports
☰	🔍	🔔	Case Tasks	Case Detail	Case Review	Perm Planning	Emancipation/Futures	Prior Adv / Profs	Outcome Measures	Case List

Case Name Broadnax/Johnson Child Name Harwood, Pearl	#Sibs 3 Age 10	Current Status Active Vol Advocate/s Gina James	Program CAP Petition 19JV045, 18JV439 County Culpeper
No future hearings for this child. Click 'Hearings' below to view/edit hearings		Manager ID 1 James, Gina Supvr ID 8 Evans, Carmella PeerC ID ID	FamGrp Nbr Child SSN 123-45-6789 Case Group El Paso

Case Details	Hearings	Notes	Placements	Education	Petitions	All Addresses	Misc. Fields	Hours	Services	Documents	Case Tags
--------------	----------	-------	------------	-----------	-----------	---------------	--------------	-------	----------	-----------	-----------

Date Referred 3/2/2016 Date Opened 3/7/2016 (5 days) Date First Assign. 9/14/2022 Date Closed	Type of Case Child Neglect Legal Status Dependent Plan/Goal Reunification Length Of Case 2759 Days 7.5 Yrs	Referred by Judge Ref Name Billings-Vela Special Programs Diversion Priority	Date to Destroy File Grant VOCA Grant Date 9/1/2022 VOCA Info
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Frequently
asked
Questions



Frequently Asked Questions

- Which fields need to be completed?
- What do purple fields mean?
- Why can't I assign a volunteer?
- How do I **properly** assign advocates?
- How do I **properly** close cases?
- How do I **properly** discharge advocates?
- How do I fix my mistakes?
- How do I track volunteers' inservice and compliance?
- How do I relist/reopen cases that closed and came back?
- Which reports do I need to get certain data?
- National CASA/GAL annual and 6-month surveys
- What data do I need to enter to run my VOCA grant?

What Are YOUR Questions?



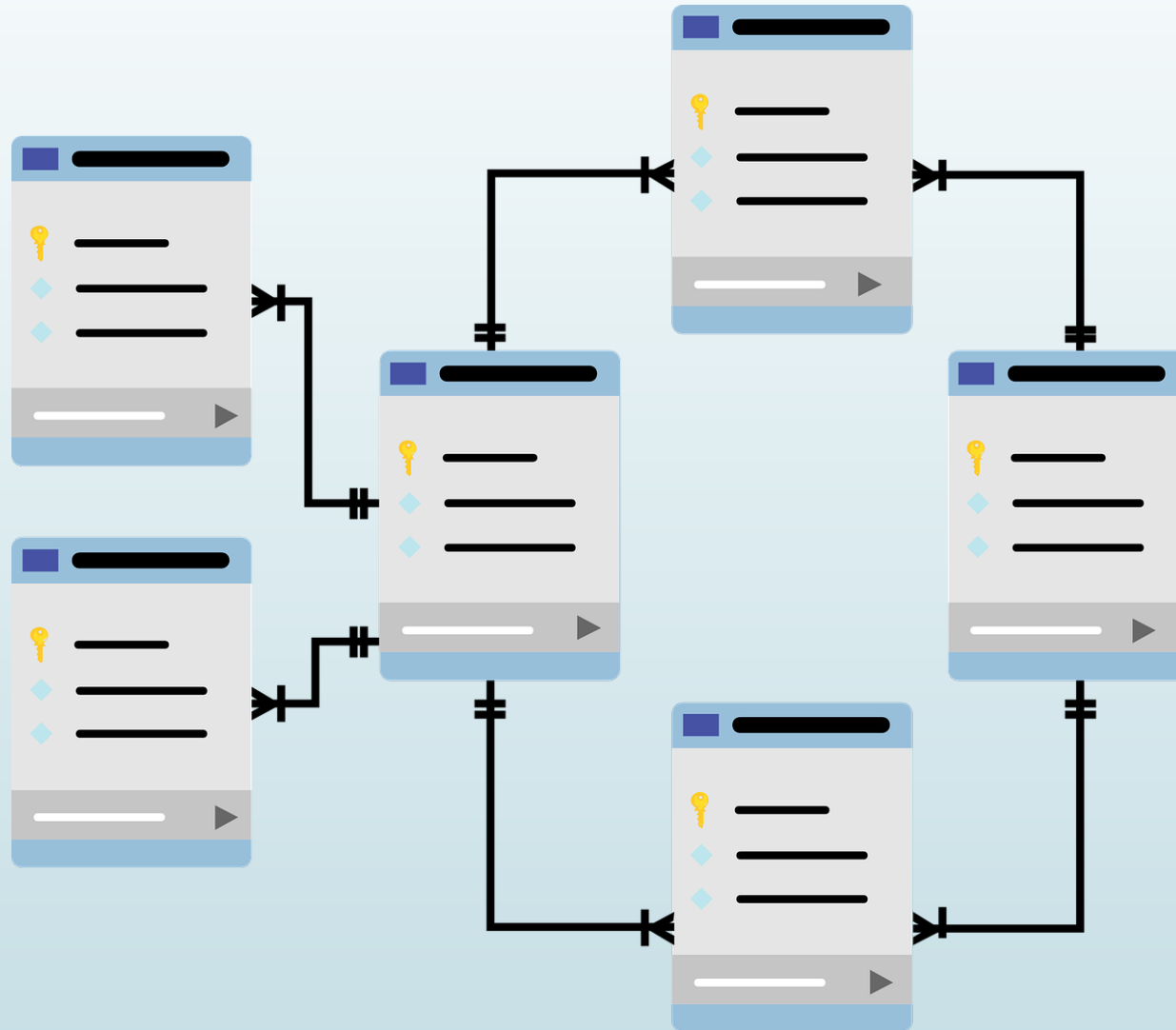


What Are YOUR Questions?

Write your own notes and questions on your handout in this space.




CasaManager is a Relational Database



What Does Relational Database Mean?

While the workflows in CasaManager look disconnected, everything is actually tied together very tightly.



CasaManager **They each flow into one another in some way.**

←	Home	→	Staff	Family/Child	Casework	Facility/School	Inserv/Outreach	Professionals	Volunteers	Reports
Home	Search	36	Dashboard	Agency Info	Customize	Zips	National Survey	CM Site Map	Web Links	Performance Report

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Block #4:

Underutilized Features



Underutilized Features

- Additional Screening
- Agency Level Preferences
- Child Match
- Data Review Dashboard
- Emailing Volunteers, Parents, and Professionals
- Emancipation / Independent Living Skills Prep
- Exporting to Excel / Numbers
- Filtering
- Inservice Audit Form Letter
- Intake Forms (Family, Child, Case)
- Integrated Court Calendar
- Integrated Help Guide
- Integrated Reminders



Underutilized Features

- Life Long Links (Family Finding)
- Mix and Match
- Quick Field Searches
- Sharing Function
- Site Map
- TagManager
- Training Channel (Recorded Sessions)
- User Preferences
 - Hide/Show
 - Tab/Scroll
 - Presets
 - Other User Preferences
- Volunteer Interview Form
- Volunteer Portal

Aha Revelations!





Aha Revelations!

Use this space to write down 3 to 5 things you learned in this block.





Block #5:

Hidden Gems





Hidden Gems

- Archiving
- Audit Log
- Automated Volunteer References
- Custom Field Labels *(Admins Only)
- Custom Forms and Letters
- Custom Report Builder
- Report Archive
- Setting Required Fields *(Admins Only)
- SuperSearch
- Training Certificates

Aha Revelations!





Aha Revelations!

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By using CasaManager, you build your skill set!

AND

You build your skill set by using CasaManager!



I Need One Thing From YOU!

Please email me an updated staff directory.

My internal customer database is not connected to your live data, so I must be informed of all staff changes.

Agency Name and City
Staff Name
Position/Title
Email Address
Phone Number/Ext.



Thank you for your time!

If you have additional questions, please contact me:

GINA A. JAMES
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For support, please email
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