



VOCA / OVC-Specific Training

Grant tracking and reporting in CasaManager

Session description

This training covers the VOCA / OVC grant workflow: adding the VOCA grant to your value list, tying the VOCA grant to your children, finding children who are not flagged as VOCA, adding VOCA services to your children, running your VOCA report, and using the VOCA Data Wizard.

We will also cover how to easily add OVC services and sub-services categories to your agencies' value list (aka drop down list).

This training is ideal for any agencies receiving VOCA funds.

Emphasis from Nebraska CASA: OVC Grant

Individual advocacy is any time a CASA volunteer or staff are reaching out to help a child get a service, contact their GAL, caseworker, or anyone else to communicate the needs of their CASA children, submitting court reports, and going to court.

Be sure that each child's individual advocacy and any other services (and referrals for services) are documented.

Having accurate and complete documentation impacts your OVC reimbursement.

This training is ideal for any agencies receiving VOCA / OVC funds.

YOUR TRAINER

About the facilitator

My name is Gina A. James.

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

I love our suite of products!



WHAT WE'LL COVER

VOCA / OVC grant tracking and reporting

1 How to add the VOCA grant to your agency's data

2 How to tie the VOCA grant to the kids

3 Quick Field Search for VOCA kids

4 Adding VOCA services to the kids

5 Child Picker to share VOCA services to sibs

6 Exporting to Excel

WHAT WE'LL COVER

VOCA / OVC grant tracking and reporting

● Quick Counts

● [VOCA Stats report aka PMT system](#)

● VOCA Ethnicity report

● VOCA Summary report

● Mix & Match VOCA ad hoc report

● VOCA Data Wizard

● VOCA Worksheet

By using CasaManager, you build your skill set.

AND

You build your skill set by using CasaManager!

QUESTIONS

Thank you for your time!

If you have additional questions, please contact me.

Gina A. James

Sales & Training Executive

gina@casamanager.com

For tech support

Please contact:

support@casamanager.com

Screen shots section

Step-by-step walkthroughs of the VOCA workflow in CasaManager

SETTING UP THE GRANT

Be sure VOCA is in the grant field

Casework

Facility/School

Inserv/Outreach

Professionals

Volunteers

Reports

Case Detail

Case Review

Perm Planning

Emancipation/Futures

Outcome Measures

Case List

Record Complete

Family ID759

Child ID1313

Child DOB6/12/2016

#Sibs2

Age9

Current StatusActive Vol

ProgramCASA

Petition25JV7395

CountyEl Paso

Advocate/sBeth Wilkinson

Manager IDID

Supvr ID15

PeerC IDID

James, Gina

FamGrp Nbr

Child SSN

Case Group

ements

Education

Petitions

All Addresses

Misc. Fields

Hours

Services

Documents

Type of CasePhysical Abuse

Legal StatusDependent

Plan/GoalReunification

Length Of Case8

Days0.0

Yrs

Referred byJudge

Ref NameJudge Kennedy

Special Programs

Priority

GrantVOCA

Grant Date

PPR Grant

Tri-Lakes + VOCA

United Way

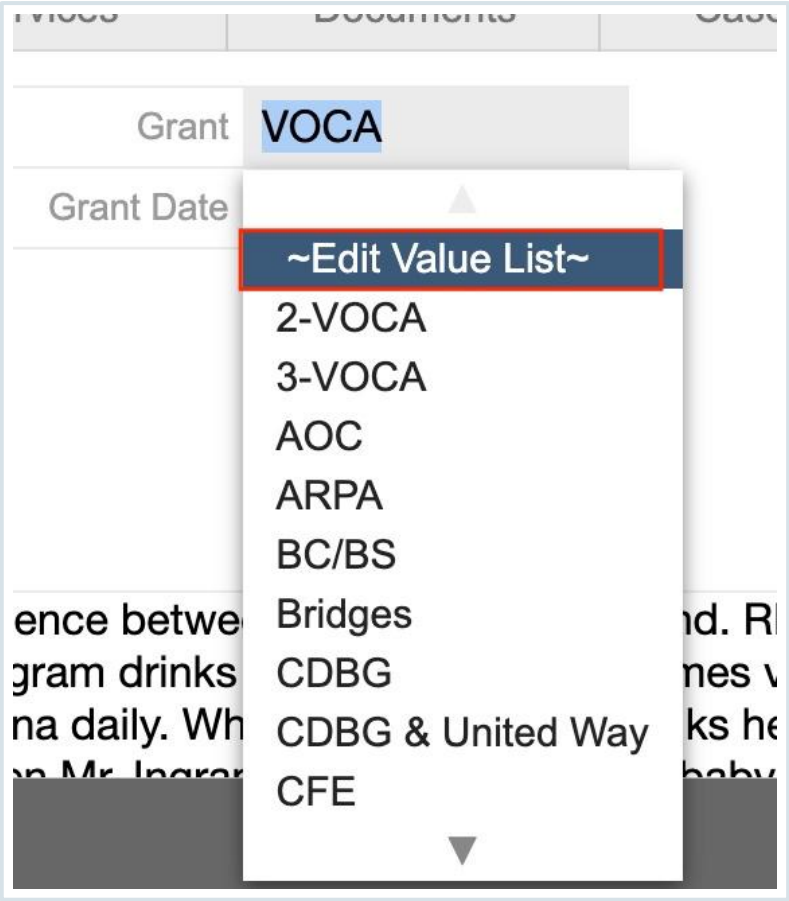
UV_VOCA

VALE

SETTING UP THE GRANT

If it's missing, edit the value list

Add VOCA to the list.



SETTING UP THE GRANT

Add VOCA to the list

Edit the value list assigned to the field: GrantsLU

* Grayed-out items are locked and may not be edited

Find a Value List

Value List Name

Grant List

Values in this list: Add the grant, then select 'Done'.

+ Click here to Add Value

2-VOCA

3-VOCA

AOC

ARPA

BC/BS

Bridges

CDBG

CDBG & United Way

CFE

DCFS

Fostering Futures

✕

✕

✕

✕

✕

✕

✕

✕

✕

✕

✕

Done

Assigning VOCA to children

Grant	Select VOCA
Grant Date	▲ PPR Grant Tri-Lakes + VOCA United Way UV_VOCA VALE VCAN_VOCA VOCA

Quick Field Search for VOCA kids

Request

1

Q⁺

Perform

Cancel

Search for...

3. Perform the find.

1. Enter Search/Find Mode

?

Staff

Family/Child

Casework

Facility/School

Inserv/Outreach

Professionals

Volunteers

Reports

Case Tasks

Case Overview

Case Detail

Case Review

Perm Planning

Emancipation/Futures

Outcome Measures

Case List

(you are in Find mode)

Case ID

Family ID

Child ID

Child DOB

Case Name

Child Name

#Sibs

Age

Current Status

Current Status

Program

Petition

County

Next Hearing

Type / Location

Judge / Dept

Advocate/s

Visiting

Manager ID ID

Supvr ID ID

PeerC ID ID

FamGrp Nbr

Child SSN

Case Group

2. Select VOCA in the grant field.

Case Details

Hearings

Notes

Placements

Education

Petitions

All Addresses

Misc. Fields

Hours

Services

Documents

Matching Info

Case Tags

Date Referred

Date Opened

Date First Assign.

Date Closed

Date Destroy File

Type of Case

Legal Status

Plan/Goal

Length Of Case

Days

Yrs

Referred by

Ref Name

Special Programs

Priority

Grant VOCA

Grant Date

Adding VOCA services to kids

The VOCA Info button is also located in Notes.

Grant VOCA

Grant Date

This will open the window to add VOCA services.

VOCA Info

Adding VOCA services to kids

Case Details

Hearings

Notes

Placements

Education

Petitions

All Addresses

Misc. Fields

Hours

Services

Documents

Case Tags

VOCA Special Classif.

VOCA Victimization Types

VOCA Services

+ New VOCA Service

Print

Grant Date

Total Quantity

1

☐ Hearing

☐ Homeless

☐ Immig/Refugee

☐ LGBTQ

☐ Limited Eng.

☐ Cog/Ment/Phy Dis.

☐ Arson

☐ Bullying

☐ Burglary

☐ Child Pornography

☐ Dom. Violence

☐ Hate Crime

☐ Homicide Victims

☐ Human Trafficking

☐ Kidnap (Cust)

☐ Kidnap (NonCust)

☐ Neglect

☐ Physical Abuse

☐ Robbery

☐ Sexual Abuse

☐ DUI/SubAbuse

☐ Stalking

☐ Teen Dating

Date	VOCA service provided	Service Description Sub-type	Qty	Completed by
6/24/2025	Personal Contact with Child	Initial Home Visit	1	Volunteer
Did 1st visit to aunt's home...				

Share/Edit

Check any applicable Special Classif., Victimization Types, and then + New VOCA Services.

Adding VOCA services to kids

VOCA Service For: Ivan Ingersoll

Date7/2/2025

VOCA service

Service Sub-type

Qty

Completed By

Comment

Add the appropriate VOCA Service, Sub-Type, Qty, Completed By, and Comment, then select Done.

Cancel

Done

Duplicate Service For ...

Share this Service

Child Name

Case Status

Sharing VOCA services with siblings

VOCA Service For: Ivan Ingersoll

Date7/2/2025

VOCA servicePersonal Advocacy

Service Sub-typeAttended Court Hearing

Qty1

Completed ByVolunteer

CommentAttended the review hearing on the kids and asked the court to order sibling visits.

Cancel

Done

Duplicate Service For ...

Share this Service

Child Name

Case Status

To apply the same VOCA service to siblings, select 'Share this Service' and then pick the siblings.

SHARING ACROSS SIBLINGS

Sharing VOCA services with siblings

Share Service for Ivan Ingersoll:

Filter By: Family ID

Include Closed Cases ☐

Enter Find Mode

** Grayed-out names are already shared

Scroll to see more related

Family ID	Child ID	Child Name	Current Status	Case Name	Case Group	Petition	Supervisor	Current Advocate
759	1311	Isabella "Izzy" Ingram	Active Vol	Ingram/Ingersoll		25JV7395	Gina James	Wilkinson, Beth
759	1313	Ivan Ingersoll	Active Vol	Ingram/Ingersoll		25JV7395	Gina James	Wilkinson, Beth

Choose a child, then 'Save'.

Cancel

Save

Sharing VOCA services with siblings

VOCA Service For: Ivan Ingersoll

Date7/2/2025

VOCA servicePersonal Advocacy

Service Sub-typeAttended Court Hearing

Qty1

Completed ByVolunteer

CommentAttended the review hearing on the kids and asked the court to order sibling visits.

Cancel

Done

Duplicate Service For ...

Share this Service

Child Name	Case Status	
Isabella "Izzy" Ingram	Active Vol	

This window shows any child you're sharing the VOCA service with.

If you selected a child in error, hit the 'x' to deselect that child.

Exporting to Excel

Go to Case List and choose the export icon.

GETTING YOUR DATA OUT

Exporting to Excel

Be sure to include field column names.

Export Records

Available Fields:

type to filter list below

300A_PhyAbuse
300B_PhyNeglect
300C_EmotionaAbuse
300D_SexualAbuse
300E_PhysicalAbuseUnder5yrs
300F_Abandonment
300G_Parent In Jail
300H_FreedForAdoption
300I_Cruelty
300J_SiblingAbuse
300K_388_450
Abandonment
Abandonment
Active Adv - Employer
Active Adv - Ethnic Origin
Active Adv - Preferred Phone
Active Advocate Address
Active Advocate CSZ
Active Advocate Date Assigned
Active Advocate Email
Active Advocate First Name

Move Selected >>>

Move All >>>

<<<Clear Selected

<<<Clear All

Fields to Export:

▲▼ Case Name
▲▼ Child L/F Name
▲▼ Department
▲▼ Current Status
▲▼ Date Referred
▲▼ Date Opened
▲▼ Date Closed
▲▼ Current Advocate(s)
▲▼ Child ID
▲▼ Removal Zip
▲▼ Case ID
▲▼ School City
▲▼ Placement City
▲▼ Placement City Previous
▲▼ Petition
▲▼ Child - Age Today
▲▼ Case Group
▲▼ School County
▲▼ Manager ID
▲▼ Peer Coordinator ID
▲▼ Supervisor ID

Export Options

Include Field/Column Names: ☒

EXPORT

SAVE SELECTED FIELDS AS TEMPLATE

Saved Export Templates

Active Cases_Vol_Supv (for Dani 8-12-
Active Vol-GJSupv-VOCA_Brenham
Bernadette's Excel List
Child Placements_Volunteers (testing
Children Served List
Concord Kids 11-16-18
(For Vivian 4-16-21)
Gina's Active Vols

CANCEL & RETURN

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21

Exporting to Excel

You must choose 'Comma-Separated Text'.

The screenshot shows a dialog box titled "Export Records to File". Inside, it says "Specify a filename and file type to export." There are three red annotations: "Give your export a name." pointing to the "Save As:" label, "You must choose 'Comma-Separated Text!'" pointing to the "Type:" dropdown menu, and an "OK" button. The "Save As:" text box contains "VOCA Kids - Jan - June". The "Type:" dropdown menu is open, showing options: "Tab-Separated Text" (selected with a checkmark), "Comma-Separated Text" (highlighted with a red box), "DBF", "Merge", and "HTML Table".

Export Records to File

Specify a filename and file type to export.

Give your export a name.

Save As: VOCA Kids - Jan - June

You must choose 'Comma-Separated Text!'

Type: ☒ Tab-Separated Text
Comma-Separated Text
DBF
Merge
HTML Table

OK

VOCA reports: quick counts

 Quick Counts

←

🏠

→

StaffFamily/ChildCasework



Quick CountsAll ReportsCustom Reports

Enter a Start and End Date.

Enter a Date Range

📅 Quick Date

Start Date:1/1/2025

End Date:12/31/2025

CountyAll

Program

GrantVOCA

Select VOCA from the Grant list.

Set Counts

Then Set Counts.

Troubleshoot Worksheets have been moved to All Reports, under the Worksheets section

Children Served By...

Print

+2Monitored

+95Vol Advocates

+0Non Adv Vols

+3Staff Advocates

+0Relisted / Waiting Children

+0Vol & Staff Adv

=100Total Children Served

Other Counts

100Unique Children served

52Family Groups Served

91Petitions

13New Children

13New VOCA Children

10Referred/Appointed to Agency

1Unserved Children

VOCA REPORTS

VOCA reports

Stats is the most common, but you can run any.

ff

Family/Child

Casework

ounts

All Reports

Custom Reports

Step 2: Select Favorite Report

🔍 voca

✕

☆ All Reports

★ Favorites

★ Stats: VOCA Ethnicity Report

★ Sum: VOCA Services

★ VOCA Stats Report

★ VOCA Worksheet

VOCA reports

You can either run the report or run the wizard to check for missing VOCA data.

The screenshot displays the Casamanager VOCA Reports interface. The top navigation bar includes links for Back Counts, All Reports, Custom Reports, Mix and Match, Report Archive, and Data Review Dashboard. The main content area is divided into three steps:

- Step 2: Select Favorite Report**: A search bar shows 'voca'. Under the 'Favorites' tab, several reports are listed, including 'Stats: VOCA Ethnicity Report', 'Sum: VOCA Services', 'VOCA Stats Report' (which is selected), and 'VOCA Worksheet'.
- Report Preview: VOCA Stats Report**: A preview of the report is shown, including a table of data.
- Step 3: Run Report**: This section contains filters for the report, including Start Date (1/1/2025), End Date (12/31/2025), County (All), Program, Grant (VOCA), Quarter, and Vol Type. There is also an 'Include Archive' checkbox.

A 'VOCA Wizard' dialog box is open in the center, asking: 'Do you want to run the VOCA wizard before running this report?'. The dialog has three buttons: 'Cancel', 'Report', and 'Wizard'. The 'Run Report' button in the bottom right corner of the interface is highlighted with a red box.

VOCA reports

VOCA Report Criteria: You must make a selection from the top 2 fields.

Date Range is the start and end date you entered before running the report.

Report on NEW cases served in/by:

☐ Date Range ☐ Grant Date

First report of the VOCA fiscal year?:

☐ No ☐ Yes

Grant:

VOCA

- Required

Grant date is the date you may have entered in Case Detail in the Grant Date field just beneath the Grant Type.

Cancel

Continue



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26

VOCA REPORTS

VOCA reports

VOCA Report

←

🏠

→

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

1/1/2025 - 12/31/2025

Have questions about this report? Numbers not adding up, or children seem missing from this report? Let the VOCA Wizard help

VOCA Wizard

Print As List

1. VOCA Children Served

1. VOCA children (referrals) carried over:

2. NEW (by Date Opened) VOCA children (referrals) served:

3. Total VOCA children (referrals) served:

88

13

101

More Info

More Info

More Info

2. Demographics: Please indicate the number of NEW (by Date Opened) VOCA children served (federal and match) by this award during this reporting period.

2.1 - Race

Caucasian

Multi-racial

2.2 - Ethnic Origin

Hispanic/Latino

Not Hispanic or Latino

2.3 - Race/Ethnicity

Caucasian - Not Hispanic or Latino

13

4

9

13

4

9

13

4

This will display your full VOCA report with the drill down feature.

You can also run the wizard from the report.

VOCA Worksheet

Report Menu

←

🏠

→

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

Helps you identify missing VOCA data.

Step 1: Choose a Section

All Reports

Casework

Inservices

Staff

Supervisor/Manager

Trainee

Volunteer

State Reports

National Reports

Worksheets

Step 2: Select Favorite Report

🔍 Search- Report Keyword

All Reports

Favorites

List: Missing Tasks Worksheet

Case Worksheet

VOCA Worksheet

Open Case Services List

Report Preview: VOCA Worksheet

★ Remove Favorite

Use the VOCA Wizard to troubleshoot data

Start the VOCA Wizard

VOCA Worksheet

Record 4 of 80

Find Active Cases NOT in VOCA

Find All Active VOCA Cases

Find Cases in VOCA

Form ID	Case Name	Child ID	Child Name	Age	Status	Supervisor	Manager	Position	Date Reported	Date Opened	Date Closed	Grant	Grant Date	Reporting Agency	Report ID	County	Activity	Activity Date	Activity Status	Activity Type	Activity Category	Activity Subcategory	Activity Detail
1	BroadmanJohnson	4	Pearl Harwood	11	Active Vol	Evans, Carmelle	James, Gise	18/0005, 18/0014	20/02/20	4/10/20	4/10/20	VOCA	10/10/2019	1	1	Coluper							
3	BroadmanJohnson	1113	Alison Harwood	8	Active Vol	James, Gise	James, Gise	20/02/20	4/10/20	4/10/20	VOCA	10/10/2019	1	1	Coluper								
3	BroadmanJohnson	1102	Tracy Johnson	3	Active Vol	James, Gise	James, Gise	21/09/20	3/10/20	3/10/20	VOCA	10/10/2019	1	1	Coluper								
445	Payton	1003	Alondra Payton	8	Active Staff	Spaulding, Steve		CV17-24	3/10/20	3/10/20	VOCA	10/10/2019	1	1	Central								
442	Holcombe	1008	Lafayette Holcombe	20	Active Staff	Charles		86/011415	3/10/20	3/10/20	VOCA	10/10/2019	1	1	Alameda								
446	Brady Bruch	1009	Greg Brady	10	Active Vol	Kearns, Alison		20/02/20, 31/01/20	2/10/20	10/10/20	VOCA	10/10/2019	1	1	Butte								
446	Brady Bruch	1001	Patricia Brady	8	Active Vol	Kearns, Alison		12/08	2/10/20	10/10/20	VOCA	10/10/2019	1	1	Butte								
446	Brady Bruch	1002	Marisa Smith	8	Active Vol	Kearns, Alison		18/03/20	2/10/20	10/10/20	VOCA	10/10/2019	1	1	Butte								
446	Brady Bruch	1003	Jan Smith	8	Active Vol	Kearns, Alison		6/04/20	2/10/20	10/10/20	VOCA	10/10/2019	1	1	Butte								
447	ShawnaHightShawna	1007	Travis Shawna	20	Active Vol	James, Gise		20/02/20, 30/01/20	4/10/20	3/10/20	VOCA	10/10/2019	1	1	Pacific								
447	ShawnaHightShawna	1008	Caroline Wright	7	Active Vol	James, Gise		20/02/20, 18/01/20	4/10/20	3/10/20	VOCA	10/10/2019	1	1	Pacific								
448	Thompson	1009	Jonathan Thompson	11	Active Vol	James, Gise		18/03/20	3/10/20	1/10/20	VOCA	10/10/2019	1	1	El Paso								
448	Thompson	1001	Clayton Owens	7	Active Staff	James, Gise		18/03/20	6/10/20	6/10/20	VOCA	6/10/2019	1	1	El Paso								
448	Thompson	1002	Jaden Hinnick	9	Active Vol	James, Gise		18/03/20	6/10/20	2/10/20	VOCA	6/10/2019	1	1	El Paso								
448	Thompson	1004	Jaymes Hinnick	12	Active Vol	James, Gise		18/03/20	6/10/20	2/10/20	VOCA	6/10/2019	1	1	El Paso								
448	Thompson	1006	Ryan Corley	16	Active Vol	James, Gise		18/03/20	6/10/20	2/10/20	VOCA	6/10/2019	1	1	El Paso								
448	Thompson	1107	Kyle Matthews	8	Active Vol	James, Gise		20/02/20	7/10/20	6/10/20	VOCA	6/10/2019	1	1	El Paso								
448	Thompson	1108	Brandon Matthews	13	Active Vol	James, Gise		20/02/20	7/10/20	6/10/20	VOCA	6/10/2019	1	1	El Paso								
448	Thompson	1007	Tanner Owens	9	Active Vol	James, Gise		18/03/20, 18/01/20	10/10/20	10/10/20	VOCA	10/10/2019	1	1	El Paso								
448	Thompson	1008	Mason Johnson	7	Active Staff	Kearns, Alison		18/03/20	10/10/20	10/10/20	VOCA	10/10/2019	1	1	El Paso								
448	Thompson	1009	James Patterson	6	Active Staff	James, Gise		18/03/20, 18/01/20	10/10/20	10/10/20	VOCA	10/10/2019	1	1	Teller								

VOCA Mix and Match (ad hoc)

Facility/School

Inserv/Outreach

Professionals

Volunteers

ts

Mix and Match

Report Archive

Data Review Dashboard

Quick Date

Enter a Date Range.

Start Date:1/1/2025End Date:12/31/2025

Then choose Services.

Casework

Hearings

Services (child, family, VOCA)

Training (Inservice, Books, Videos, Indep. Study)

Tag Assignments

Documents

Advocates / Volunteers

Hours

Placements

Professional Assignments

Notes

VOCA Mix and Match (ad hoc)

Request1

Perform

Cancel

Staff

Family/Child

Casework

Facility/School

Interv/Outreach

Professionals

Volunteers

Reports

DATE RANGE SEARCH - to search for records in a date range, be sure to enter a start and end date, and check the relevant box(es) below

☒ Served During

Start / End

1/1/2025

12/31/2025

Quickfind

Quick Date

Include Archive

Select Applies to Child Only>VOCA.

Add any other data points you'd like then perform.

Service Category

Applies to Child or Family >

☐ Service

Applies to Child or Family >

☐ Visitation

Applies to Child only >

☒ VOCA

Reviewed

☐

This is the reviewed flag. If you only review records from added by volunteers, this is a good way to find services created in Volunteer Portal

Dates For All Services

Service Start Date

Service End Date

Review Date

Creation Date

ModificationDate

VOCA Service Information

Program Type

Service Description

Description Sub-Type

Completed By

Quantity

Supvr ID

VOCA Mix and Match (ad hoc): Quick Find

Facility/School

Inserv/Outreach

Professionals

Volunteers

ts

Mix and Match

Report Archive

Data Review Dashboard

VOCA Quick Find

Quick Date

Start Date:

End Date:

1/1/2025

12/31/2025

Enter a date range.

Casework

Advocates / Volunteers

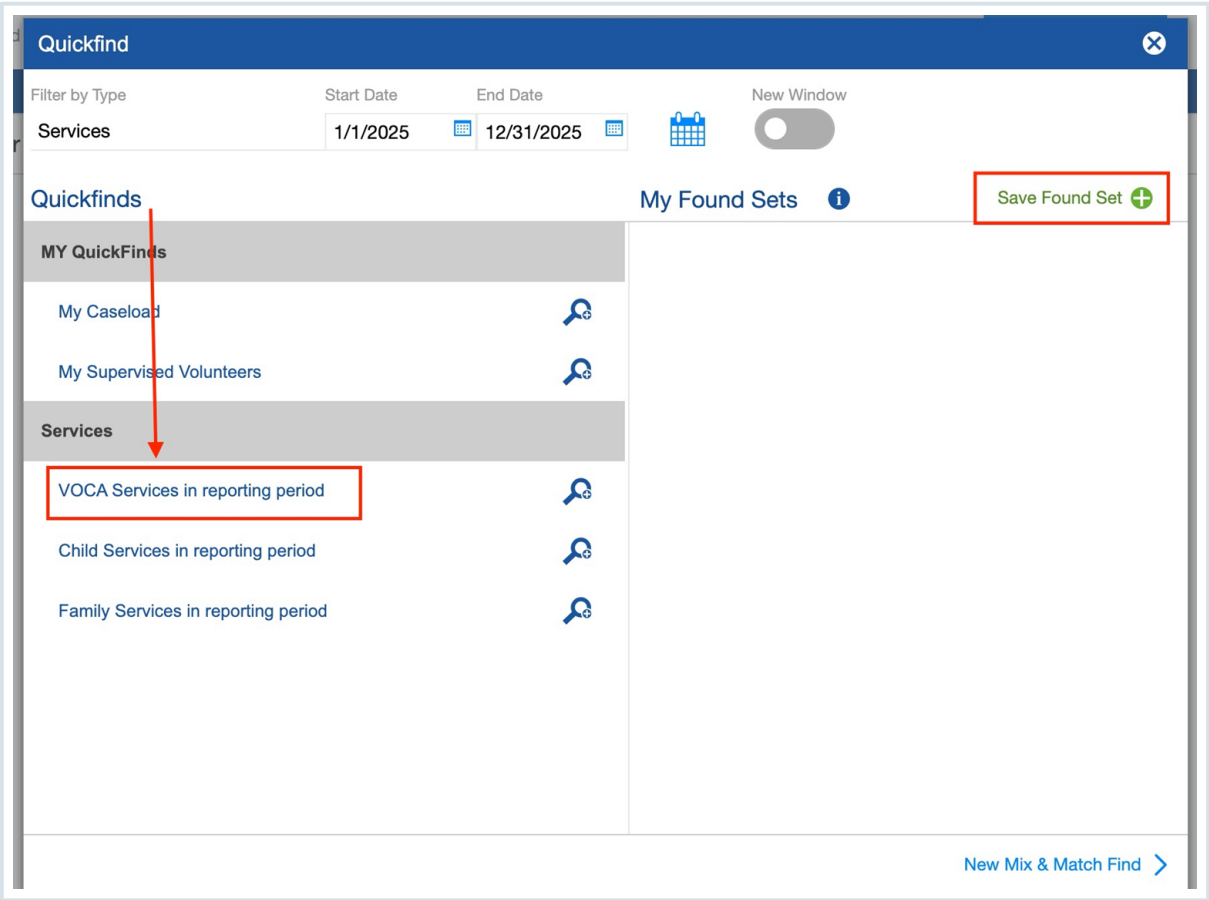
Hearings

Hours

Services (child, family, VOCA)

Placements

VOCA Mix and Match (ad hoc): Quick Find



VOCA Mix and Match (ad hoc): Quick Find

Services List (21) **Displays the list of VOCA services for kids**

← Home →

StaffFamily/ChildCaseworkFacility/SchoolInserv/OutreachProfessionalsVolunteersReports

Family DetailChild DetailEducationHealthServicesSupervised VisitsFamily ListChild List

Hide DetailSort

Date	Case Name	Child Name	Category	Description	Description Subtype
VOCA - 21					
7/2/2025	Ingram/Ingersoll	1313 Ivan Ingersoll	voca	Personal Advocacy	Attended Court Hearing
7/2/2025	Ingram/Ingersoll	1311 Isabella "Izzy" Ingram	voca	Personal Advocacy	Attended Court Hearing
6/24/2025	Ingram/Ingersoll	1311 Isabella "Izzy" Ingram	voca	Personal Contact with Child	Initial Home Visit
6/24/2025	Ingram/Ingersoll	1313 Ivan Ingersoll	voca	Personal Contact with Child	Initial Home Visit
6/3/2025	Porter/Steele	1135 Cassandra "Cassie" Steele	voca	Personal Contact with Child	Home Visit
6/3/2025	Porter/Steele	1137 Lyonna Steele	voca	Personal Contact with Child	Home Visit
6/3/2025	Porter/Steele	1136 Patrice "Tecie" Steele	voca	Personal Contact with Child	Home Visit
6/3/2025	Porter/Steele	1135 Cassandra "Cassie" Steele	voca	Emotional Support or Safety Services	
6/3/2025	Porter/Steele	1137 Lyonna Steele	voca	Emotional Support or Safety Services	
6/3/2025	Porter/Steele	1136 Patrice "Tecie" Steele	voca	Emotional Support or Safety Services	
5/27/2025	Evans/Edwards	1307 Evangeline (Evie) Evans	voca	Personal Contact with Child	Initial Home Visit
5/27/2025	Evans/Edwards	1308 Elijah Edwards	voca	Personal Contact with Child	Initial Home Visit
5/26/2025	Thompson	1069 Jonathan Thompson	voca	Personal Advocacy	Individual Advocacy

**Thank you for putting VOCA data to work for your
kids and families.**

Questions? gina@casamanager.com • support@casamanager.com