



Data Entry Refresher Training



Importance of Accurate Data Entry

Session description

Supervision, supporting, and coaching volunteers is a big portion of our work, to ensure that our advocates are using their power to advocate for the best interests of the children we serve.

Another crucial aspect of our work is making sure that we are accurately documenting the children's journey through the juvenile court system as we work towards a safe, permanent home for all of our youth.

To that end, this session will cover key data entry requirements which must be completed by either the CASA staff using CasaManager and/or the advocates (through using the Volunteer Portal).

OVERVIEW

Emphasis from Nebraska CASA: Data Entry Requirements

Nebraska CASA has identified a number of data entry points which MUST be accurately reflected in each agency's CasaManager system.

So that Nebraska CASA can accurately and truthfully report data on the children you serve and the volunteers who are doing the work on behalf of those children, there are very specific data points which each agency's staff must ensure are timely and accurate.

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

Key Data Needs and Requirements by Nebraska CASA

- 1 Monitored Children Definition
- 2 Documenting children whose cases are closed and entering the outcome at case closure
- 3 Children's demographics (i.e. Ethnicity, Race, Age, and Gender)
- 4 Court reports submitted needs to be documented
- 5 Volunteer recruitment, screening, initial training, sworn in data
- 6 Volunteer inservice trainings, case hours, mileage, visits with their CASA youth

Monitored Children

Monitored children are those for whom the program does not intend to submit a CASA court report and should not be counted as children served.

However, children with an assigned CASA volunteer who is actively working the case in preparation for a future court report should be counted as served, even if the first report has not yet been submitted.

The current status of a monitored child in CasaManager is automatically triggered when there is a date referred and a date opened but no date of original assignment of a volunteer advocate or staff advocate. To avoid having any child's status become monitored, do not enter a date opened. It is fine to have a date referred.

.

Monitored Children

Case Name

Washington/Jones/Owens

Child Name

Owens, Corey

Child DOB

11/29/2025

Age

0

Chd

1

Automatically triggered by...

Current Status

Monitored

Program

CASA

Advocate/s

Manager ID

Supvr ID

PeerC ID

No future hearings for this child.
Click 'Hearings' below to view/edit hearings

Hearings	Notes	Placements	Education	Petitions	All Add
Date Referred 12/15/2025 Date Opened 12/20/2025 5 days Date First Assign. No date assigned					
Date Closed					
Date Destroy File					

Type of Case

Child Neglect

Legal Status

Dependent

Plan/Goal

Remain in Home

Length Of Case

241

Days

0.6

Yrs

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
Relist Child	7. To Relist a closed case, Click the "show closed cases" X box, then select.	Status = Wait

Children Whose Cases Have Closed

When a child's case has closed for whatever reason, you must complete the case closure data so that those children will no longer show as actively being served by the program.

The required data points for closed cases are:

- a. Adoption
- b. Child Aged Out
- c. Guardianship
- d. Reunification
- e. Court Dismissed
- f. Case Transferred (includes Bridge Orders)
- g. CASA Removed
- h. Case Dismissed/Removed from Docket
- i. Emancipation

If a case closure outcome is not in your data, you can add that to your value list (aka drop down list).

Children Whose Cases Have Closed: Case Tasks

Case Tasks

SuperSearch...



←

Home

→

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

Case Selector Case Overview has moved! It's now in the dark-blue nav bar above

1)

Case Name	Child Name	Petition	Case Group	Current Status	Supvr ID	# in Family	# Vol	# Staff
Stapleton/Staunton								

2)

Child/ren Associated with Selected Case

☐ Show Closed Cases

Case Name	Child Name
Stapleton/Staunton	Sienna
Stapleton/Staunton	Sammy

Select one or more children from the list of children below.

2 Child/ren selected

Clear

Date Closed	#Vol	#Staff	Select
	1		☒
	1		☒

3)

Select a Task

What do you want to do?

Select Task...

Wait to Monitored

Monitored to Wait

Assign to Staff

Assign to Volunteer

Remove Advocate

Close Case

Relist Child

1. Open case, monitored by Staff

2. Revert from Monitored to Wait

3. Open case, Serve with Staff Advocate

4. Open case, Serve with Vol Advocate

5. Remove all Staff or Vol Adv, return to wait list

6. Close case, discharge Advocate/s

7. To Relist a closed case,

Status = Monitored

Status = Wait

Status = Active Staff

Status = Active Vol

Status = Wait

Status = Closed

Status = Wait

Note: Cases with a date in the Date Opened field will be included in Stats as 'served monitored'

Remove all Staff or Vol Adv, return to Supvr

Remove 1+ Adv, but leave 1 Adv

Close case, no Advocate

Record History

Children Whose Cases Have Closed: Case Outcome

*Note the buttons for Case Info, Profs, and Placements! Complete that data, too!

Close Case

Set case closure details for the cases below:

Sienna Stapleton	Case Info	Professionals	Placements	Purple fields are required!	
Sammy Staunton	Date Closed	Program at Close	Close Reason	Case Outcome	Supervisor
	SubType	Placement Final	SubType	SubType	Peer Co.
				Future Date to Destroy Files	SocWkr Differ w CASA?
				NCASA standard is 7 years	Vol. Adv. Affect Crt Decision?
					Success story?
	Staff Advocate	Date Discharged	Discharge reason		
	Staff Advocate #1				
	Volunteer Advocate	Date Discharged	Discharge reason		
	Volunteer Advocate #1	Janie Johnston	Case Closed		
	Type in personal note here for letter >>>				

Cancel

Submit

Children's Demographic Data

- Ethnic Origin
- Race
- Age
- Gender

Demographics

Birthdate / Age @ Ref	6/28/2016	9
Gender	Male	
Pronouns		
Language	English	
2nd Language	Secondary	
Race	Multi-racial	
Ethnic Origin	Not Hispanic or Latino	
Native Tribe		

Court Reports Submitted Documentation

A volunteer's written court report is evidence of them doing the work required on behalf of the children they serve. Many times, the judges rely on the CASA volunteers' written court reports to make best interest findings on behalf of those children. The submission of the advocates' court reports must be documented in CasaManager.

In the Hearings Tab (in Casework), you will see fields for the following, regarding court reports:

- a. Date Due
- b. Date Received
- c. Rpt?
- d. Recommendations
 - i. Made
 - ii. Accepted
 - iii. Not Considered
 - iv. Rejected

Court Reports Submitted Documentation:

Case Detail>Hearings

								# Hearings	3			
Court Report		Rpt?	Who Attended					# Recommendations				
Date Due Date Rec'd			Chd	Vol	Sup	Att	Sta	Made	Acc	NC.	Rej.	
		3						13	10	2	1	
7/16/26	7/20/26	☒	☐	☐	☐	☐	☐	6	4	1	1	⋮
6/30/26	7/1/26	☒	☐	☐	☐	☐	☐	3	3	0	0	⋮
6/16/26	6/16/26	☒	☐	☐	☐	☐	☐	4	3	1	0	 ⋮

Court Reports Due Dates Trigger

The due date for volunteers' court reports is located in Agency Info.

You may set any number of days ahead of all court hearings that your agency chooses. This number of days in advance will apply to all volunteers' and supervisors' cases.

Agency Hearing Preferences

Hearing Advance Start - # of days to a Monday in the future. Count from Monday to a Monday in the future.

1	8/18/2026
---	-----------

Hearing Advance End - # of days to a Friday in the future. Count from the same Monday to a Friday in the future.

260	5/4/2027
-----	----------

Court Reports Due - # days in advance of the hearing that you want court reports to be submitted.

14

Court Reports Due Report

Step 2: Select a Report

All Reports

List: Court Reports Due

Favorites

Report Preview: List: Court Reports Due

Remove Favorite

Hearings List

Record 1 of 4

Court Reports Due

1/1/2023...12/31/2023

Filter for Supervisor

Date Due	Date Rec'd / Routed	Hearing Date / Time	Petition	Hearing Type	Dept.	Court	Chl Rpt?	Sup ID	Mgr ID	Program	Status	Child Name	Advocate
Supervisor: 67	Lane, Kevin												
11/8/23		11/22/2023 9:15 AM		Contested Placement	Dept. 1		☐	67					
Supervisor: 68	Secondary, Kevin												
11/14/23		11/28/2023 9:00 AM	CV01-20-09538	Contested Placement	8th		☐	68	13	CASA	Active Vis	Isabella Mc0000	Gina James
Supervisor: 59	XXX, Margaret (Maggie)												
10/18/23		11/1/2023 9:00 AM		Continued	JV Court		☐	59					
11/14/23		11/28/2023 9:00 AM	CV01-18-08592	Contested Placement	8th		☐	59	4	CASA	Active Vis	Enrique Mc0000	David (Dave) Par000

Court Reports Due Report

Step 1: Choose a Section

	All Reports
	Casework
	Inservices
	Staff
	Supervisor/Manager
	Trainee
	Volunteer
	State Reports
	National Reports
	Worksheets

Step 2: Select a Report

All Reports

Favorites

<input type="star"/>	Form: Annual Case Review
<input checked="" type="star"/>	Labels: My CASAs Mailing
<input checked="" type="star"/>	List: Case Updates Needed
<input checked="" type="star"/>	List: Court Reports Due
<input type="star"/>	List: Manager Caseload
<input checked="" type="star"/>	List: Master Caseload List
<input type="star"/>	List: My CASAs Detail
<input checked="" type="star"/>	List: My Hearings

[i](#) Report Preview: List: My Hearings

Hearings Supervisor List Report																		
 Remove Favorite																		
Hearing Information 1/1/2024...12/31/2024 Found Count: 13																		
Petition	Child Name / Advocate	Hearing Date	Time	Hearing Type	Outcome	Held?	Cont?	Who Attended					Recommendations				Supervisor	
								Att Rpt	Super Pres.	Staff Adv.	Vol. Adv.	Atty Pres.	# Child Pres.	# Made	# Acc.	# NC	# Rej.	
Total # of Hearings: 13						Table:		1	8									
CV 2016-00161	William PruXXX	2/21/2024	9:15 AM	Continued				☐	☐	☐	☐	☐	6					XXX,Saskia
	Stanley HatXXX																	XXX,Saskia
CV-2016-00000	Caleb NewXXX	4/4/2024	9:15 AM				Yes	☐	☐	☐	☐	☐					DR	
	Tressa VanXXX																	
CV21680, Twel2, 2017-00000-00000	Alexis AdvXXX	4/24/2024	9:15 AM	Continued				☐	☐	☐	☐	☐					4	
CV21-20-04308	Alexandra PruXXX	4/30/2024	9:00 AM	Aggravated Circumstances				☐	☐	☐	☐	☐					Lene,Kevin	
	Jennifer SixXXX																	
CVCP14-22347	Chelsey ArXXX	5/2/2024	9:30 AM	Contested Placement				☐	☐	☐	☐	☐					Lene,Kevin	
	Laura GraXXX																	
CVCP14-22347	Max ArXXX	5/2/2024	9:30 AM	Contested Placement				☐	☐	☐	☐	☐					XXX,Rachel	
	Charlie Chaplin							☐	☐	☐	☐	☐	2					Lene,Kevin
	Nathan AdvXXX	5/4/2024	9:30 AM	Case Plan				☐	☐	☐	☐	☐						
	Chloe CrXXX							☐	☐	☐	☐	☐					Lene,Kevin	
CV-2017-026-C	Kevin P Lane	3/17/2024	9:15 AM	Aggravated Circumstances				☐	☐	☐	☐	☐						
	Kevin P Lane							☐	☐	☐	☐	☐						
CV2017-00000																		

Step 3: Run Report

Grayed-out filters are not applicable for the selected report

 Clear  Quick Date

Start Date: 7/1/2026 

End Date: 9/30/2026 

County All

Program 

Grant 

Special Program 

☐ Include Archive

Court Reports Due Report

Volunteer Recruitment, Screening, and Training

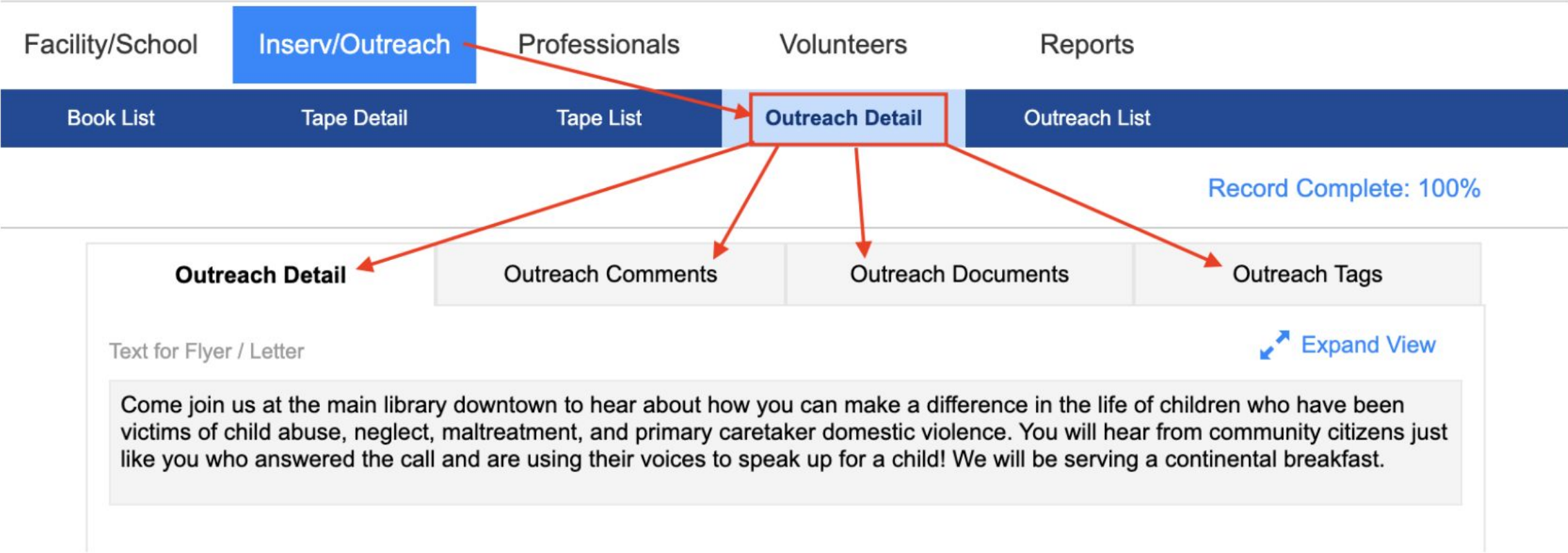
Data Entry and Reporting

Recruiting new community citizens to be potential volunteer advocates is a core function of each agency. Without volunteers, we would not be able to do this work.

In order to get more volunteers, we must first recruit them from our communities. CasaManager has dedicated fields to capture all of your recruitment campaigns, whether they be in person, virtual, on highway signs, on city buses and benches, etc. Once we recruit prospective volunteers, there is more work to be done!

- | | |
|--|---|
| a. Application Dates | f. Date Sworn In |
| b. Pre-Interview Dates | g. Case Hours and Mileage |
| c. Thorough Background Screening | h. Visits With Their CASA Children
(In-Person, Virtual, Phone) |
| d. Date Started Core Training | i. Inservice/Continuing Ed. Resources |
| e. Document Their Completion or Dropped Date | |

Volunteer Recruitment Data Entry and Reporting



Volunteer Recruitment Data Entry and Reporting

Workshop Detail

Workshop List

Book Detail

Book List

Tape Detail

Tape List

Outreach Detail

Outreach List

Add Attendees to Event: Volunteer Recruitment Event on 6/18/2026

Bulk add!

Cancel

Submit

Find & Select Attendees to Add

25 Attendees selected

Outreach Details

Search- Attendee Name

✕

All

✓

☐ Include Red Volunteers

☐ Include ALL Volunteers

Wainwright, Ginger

V

Welsh, Wanda

V

Whitaker, Jerry

V

Wilkinson, Beth

V

Wilson, Charlotte

V

Wilson, Dale

V

Abeyta, Javier

Almond, Elisabeth

Anderson, Terri

Andrews, Addison

Bilingsley, Debra

Birch, Victoria

Don't see the volunteer above?

Add Volunteer

Date

6/18/2026

Day of week

Thursday

Topic

Volunteer Recruitment Event

Location

Main Library Meeting Room #4

Type

Community Resource Fair

Speech Length

Time / Hrs

7:00 AM - 8:30 AM

1.5

Volunteer Recruitment Data Entry and Reporting

Volunteer Recruitment Event

☐ Close Event

Topic

Volunteer Recruitment Event

Type

Community Resource Fair

Location

Main Library Meeting Room #4

Date

6/18/2026

Time

7:00 AM - 8:30 AM

Hours

1.5

Length

Ex: 15 min.

Volunteer Speaker Information

Vol ID	Volunteer Name	Hours	Miles
223	Glenn, Loretta	1.5	✕
601	Salinger, Thomas	1.5	✕

Staff Speaker Information

Staff ID	Staff Name	Hours	Miles
20	James, Gina		✕
35	Lane, Kevin		✕

Volunteer Recruitment Reporting

Report Menu

SuperSearch...

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

Step 1: Choose a Section

All Reports

Casework

Inservices

Staff

Supervisor/Manager

Trainee

Volunteer

State Reports

National Reports

Worksheets

Step 2: Select a Report

outreach

All Reports

Favorites

List: Outreach Tracking

Report Preview: List: Outreach Tracking

Remove Favorite

Outreach Efforts Summary

1/1/2016 - 12/31/2016

3

Email

11/7/2016 Farmers' Market AndXXXX, Joan

11/7/2016 Farmers' Market BasXXXX, Teresa

11/7/2016 Farmers' Market BasXXXX, Harley

5

Speakers Bureau

12/14/2016 All about CASA BiaXXXX, Robert

12/14/2016 All about CASA AveXXXX, Martinee

12/14/2016 All about CASA BowXXXX, David

12/14/2016 All about CASA BenXXXX, Camille

12/14/2016 All about CASA BabXXXX, Randy

6 Total:

Step 3: Run Report

Grayed-out filters are not applicable for the selected report

Clear

Quick Date

Start Date:

1/1/2026

End Date:

12/31/2026

County

All

Program

Grant

Special Program

Include Archive



casamanager[™]
powered by sunlight

2

Volunteer How Heard Reports

Step 2: Select a Report

how heard

☆ All Reports

★ Favorites

★ Summary Report: How Heard

New!

★ List: How Heard

★ List: How Heard?

★ Sum: How Heard By Month

★ Sum: How Heard SubSummary

Volunteer Pre-Service Screening and Training Data

Now that we've recruited community members, we must now carefully vet them and enter each data point into CasaManager.

You'll go to the Volunteer main navigation button, then to the Training sub-navigation button, then to the Pre-Service Training tab and enter the following data.

- Application Dates
- Pre-Interview Dates
- Thorough Background Screening
- Date Started Core Training
- Document Their Completion or Dropped Date
- Date Done/AOK
- Date Sworn In

Volunteer Pre-Service Screening and Training Data

Training Overview

Interview

Screening

Pre-Service Training

In-Service Training

Book Library

Tape Library

Independent Study

Trainings: 1

2026 Summer Flex

+ Add Training

Training Milestones

Info Session	6/26/2026		☒
Application Rec'd	6/29/2026		☒
# Reference Ltrs	3		
Interview 1 Date	6/30/2026		☒
CO Child Abuse Registry	7/1/2026		☒
SSN Verification	7/2/2026		☒ Matched
Criminal Check	7/3/2026		☒ Speeding
Child Abuse Reg.	7/6/2026		☒ Clear
Fingerprinted	7/7/2026		☒ Done/Matched
Mandated Rpt	7/8/2026		☒ Completed

Training Cohort & Session Attendance

Training Cohort2026 Summer Flex

Date Start7/9/2026

Court Observ.7/13/2026 ☒

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

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

1. Mand.Rpt.

1. Flex #1

Completion

Date Sworn7/21/2026

Done/AOK7/20/2026

Photo☐

CC Orientation☐

AOK Points25

Total Hours41.5

< Post Hours

Fostering Futures

Enable the Fostering Futures grant in your Agency Preferences

Delete Training

Make ups ☐ Increased Knowledge? ☐ Volunteer Satisfied? ☐

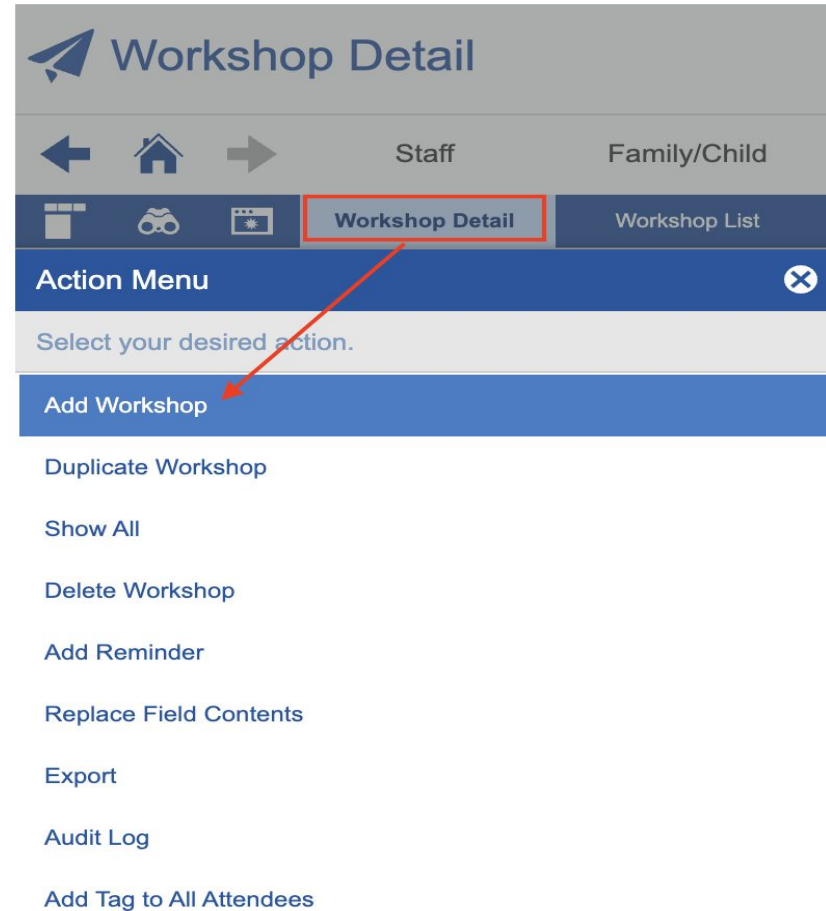
Volunteer Inservice/Continuing Ed. Training Data

Our work doesn't stop once we recruit, screen, and train a new volunteer. We must also keep them engaged by offering ongoing training opportunities, not only to help them grow their advocacy skills, but also be in compliance with NCASA/GAL standards for 12 hours of inservice participation annually.

You'll go to the Inservice/Outreach main navigation button and then to Workshop Detail. You'll enter a new workshop with all the relevant details and bulk add your attendees.

Bulk adding your volunteers in that window saves valuable time and automatically populates those trainings on each volunteer's Inservice record!

Volunteer Inservice/Continuing Ed. Training Data Entry



Volunteer Inservice/Continuing Ed. Reporting

Report Menu

SuperSearch...

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

Step 1: Choose a Section

All Reports

Casework

Inservices

Staff

Supervisor/Manager

Trainee

Volunteer

State Reports

National Reports

Worksheets

Step 2: Select a Report

Find a report...

All Reports

Favorites

★ Form: Inserv Audit Letter

★ List: Adv Compliance List

★ List: All Books Inventory

★ List: All Workshops

★ List: Overdue Books

★ List: Overdue Video/Audio Tapes

★ List: Speakers List

★ List: Tapes (Audio/Visual)

★ List: Title IV-E Determination

★ List: Training Summary

★ List: Upcoming Workshops

Report Preview: List: All Workshops

Remove Favorite

Workshop List (351)

Staff

Family/Child

Casework

Facility/School

Inserv/Outreach

Professionals

Volunteers

Reports

Workshop Detail

Workshop List

Book Detail

Book List

Type Detail

Type List

Outreach Detail

Outreach List

View List

Toggle View

[[Mic: Sort

Print

Export

Date	Time	Type	Type	Sender	Title/ID	Qty	Attended	Score ID	
6/22/2020	3:00 PM - 4:00 PM	Elmore County GAC, Gathering	Continuing Education	MagnXX	1	10	402		
6/18/2020	9:00-9:00	Jesse Tree	Continuing Education	XXX	1	13	411		
9/27/2020	12:00-1:00	Casa Community Chat	Continuing Education	XXX	1	5	400		
9/21/2020	12:00-1:00	CasaConnect Orientation	Continuing Education	AXXXX	1	18	388		
9/21/2020	9:00am-4:00pm	WCA Orientation	Continuing Education	TrXXXX	1	2	389		
9/19/2020	9:00-9:00	Casaconnect Orientation	Continuing Education	AXXXX	1	15	387		
4/29/2020	9:00 PM - 9:30 PM	Casa Community Chat	RacXXXX	1.82	11	384			
4/21/2020	12:00pm-1:00pm	Casa Community Chat	Continuing Education	AXXXX	1	14	381		
4/16/2020	10:00-11:00	Casa Community Chat	Continuing Education	MagnXX	NA	1	383		
4/13/2020	9:30 AM - 9:30 AM	Child Maltreatment/Emotional Competency	Continuing Education	JaxXXXX	3	3	386		
4/7/2020	9:00-9:00	Casa Community Chat	Continuing Education	SeXXXX	1	9	382		
4/1/2020	12:00-1:00	CASA Community Chat	Continuing Education	DerXXXX	1	14	380		
2/10/2020	6:30 - 7:30	Internal Crimes Against Children	Continuing Education	VuXXXX	1	15	386		
2/6/2020	7:30-2:30	Foster Care Awareness Day	VOCA	MuXXXX	NA	7	17	385	
12/19/2019	8:30-12:00	2019 Safety Together: Tools to Achieve Safe and Speedier Permanency	Legal	RegXXXX	3.5	21	385		
12/12/2019	08:30-9:00	2019 Safety Together: Tools to Achieve Safe and Speedier Permanency	Legal	RegXXXX	8.5	23	385		
12/12/2019	6:30-7:30	Mental Health and Self-Care	Continuing Education	VorXXXX	1		183		
12/5/2019	4:00-6:00	CasaConnect Orientation	Continuing Education	AXXXX	NA	1	9	381	
12/5/2019	12:00 pm - 5:00 pm	Peer Coach Training	DerXXXX	5	2	386			
11/21/2019	6:15-6:15	Finding Kind: Kind Campaign	Cultural Awareness	MoXXXX	2		384		

Step 3: Run Report

Grayed-out filters are not applicable for the selected report

Clear

Quick Date

Start Date:

1/1/2026

End Date:

12/31/2026

County:

All

Program:

Grant:

Special Program:

Include Archive

☐

Run Report

Volunteer Background Re-Checks Data Entry:

Volunteers>Training>Screening

Screening

Pre-Service Training

In-Service Training

Book Library

Tape Library

Independent Study

SSN / Drivers License information

Soc Sec nbr

Optional

Driver Lic. #

CO 4845R-198

DL Expires

12/16/2020

Additional Screening Documentation

+ Add Screening

Date	Type	Finding
1/16/2024	Child Abuse Registry Re-Check	Done/Clear
1/15/2024	FBI Criminal Check	Clear
8/7/2023	Conflict of Interest	Signed and Returned
11/8/2022	Driving Authorization	Signed
8/30/2021	Megan's Law	Attended
7/8/2021	Local Criminal Re-Check	Clear
3/2/2021	Social Media Agreement	Signed
1/15/2021	WA State Patrol	Clear

Volunteer Background Re-Checks Reports

Step 2: Select a Report

searching

All Reports

List: Additional Screening

List: Screening Certification

List: Screening Checkbox

Report Preview: List: Additional Screening

Remove Favorite

Additional Screening List

Date	Type	
1 Application		
8/18/2009	Application	Leslie GodXXX
1 Authorization Letter Submitted to ISC		
4/29/2020	Authorization Letter Submitted to ISC	Nimata SarXXX
4 Background Check Destroyed		
5/20/2019	Background Check Destroyed	Erin AbuXXX
2/26/2020	Background Check Destroyed	Heather DaXXX
2/26/2020	Background Check Destroyed	Melody PacXXX
9/16/2021	Background Check Destroyed	Secondary, Kevin
5 Background Check Questions Returned		
11/14/2017	Background Check Questions Returned	Jay StoXXX
5/14/2019	Background Check Questions Returned	Anthony (Tony) CarXXX
8/15/2019	Background Check Questions Returned	Brittany MacXXX
9/24/2019	Background Check Questions Returned	Arika GarXXX
11/13/2019	Background Check Questions Returned	Stanley HarXXX
1 Background Packet Held/Locked		
7/17/2019	Background Packet Held/Locked	Gayle DaXXX
165 Background packet submitted to Supreme Court		
6/25/2015	Background packet submitted to Supreme Court	John (Jeff) BlaXXX
2/20/2018	Background packet submitted to Supreme Court	Colleen SeaXXX
4/2/2019	Background packet submitted to Supreme Court	Megan CuXXX
4/15/2019	Background packet submitted to Supreme Court	Michael RaXXX
4/15/2019	Background packet submitted to Supreme Court	Marie WuXXX
4/15/2019	Background packet submitted to Supreme Court	Darryl HowXXX

Volunteer Case Hours, Mileage, and Child Visits

Like all other data points we've covered in this session, this is crucial data and must be completed!

Volunteer case hours, mileage, and child visits are easily entered by either the volunteers using the Volunteer Portal or the staff using CasaManager.

Staff will navigate to the Volunteer module, then to the Hours sub-navigation, then to the Case/Child Hours tab. Then simply click on +New Case Hours.

******We know that our volunteers underreport their case hours and mileage. It is up to us to encourage them to accurately report this data either through their supervisor or through the Volunteer Portal.

Gina James

Hours

First: Gina
Middle:
Last: James
Nick Name:

Adv Status/Code: Green Advocate
Vol Status/Code: Green Non-Adv Vol

County: Kit Carson and
Preferred Phone: 719-xxx-xxxx
Vol Portal Access: ☒

Time w/ Program: 10.6
Time as CASA: 91.0

Case/Child Hours

Filter Date Range: 1/1/2026 - 12/31/2026

+ New Case Hours

Child ID	Child Name	Date	VOCA	Type of Contact	Hours	Mileage	Inkind amount	Visits	Contacts	Case Activities
1135	Steele, Cassandra "Cassie"	7/9/2026	☐	Case Meeting	1.06	35.73		1	18	At this meeting, the treatment providers covered a wide range of topics
1137	Steele, Iyonna	7/9/2026	☐	Case Meeting	1.06	35.73		1	18	At this meeting, the treatment providers covered a wide range of topics
1136	Steele, Patrice "Tecie"	7/9/2026	☐	Case Meeting	1.06	35.73		1	18	At this meeting, the treatment providers covered a wide range of topics
1067	Owens, Travis	7/6/2026	☒	Youth Contact	2.75	94.5		1	15	Therapeutic Staffing
1093	Helmick, Jaden	5/4/2026	☒	Group Home Visit	2.5	16		1	9	Attended Hearing
1067	Owens, Travis	5/4/2026	☒	Case Meeting	.75	16		1	9	Foster Care Review

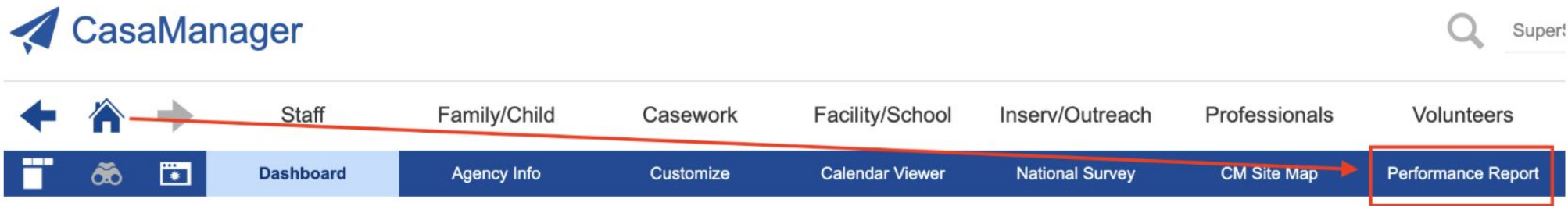
*Bonus: Performance Report

CasaManager has a robust performance report, which displays key data points such as:

- Summary of Children Served
- Volunteer Status Summary
- Case Status Summary
- Closed Case Outcomes
- Volunteer Training
- How Heard Summary

Each of these data points has our signature 'Jump to' feature, which allows you to easily navigate to the records.

*Bonus: Performance Report



*Bonus: Performance Report

Set any date or date range.

Start Date

End Date

County

Program

Grant

Clear Filters

Print

Set Counts

SERVED BY SUMMARY

139

Served by Vol Advocate

+ 4

Served by Staff Advocate

- 1

Served by both Vol AND Staff

= 142

Served by Vol or Staff

+ 4

Monitored

+ 0

Waiting (previously assigned)

+ 1

Served by Non Adv Vols

= 147

Total Children Served

146 Unique children in 72 families

118 Petitions

147

Children Served

Click here to set goals

CASE STATUS SUMMARY

135

Active At Start

11

Referred/Appointed to Agency

8

Children Opened

3

Children Closed

21

Unserved Children

84.7

Average Wait (days)

42.4

Average Case Life (mos)

Closed Case Outcomes

1

Legal Guardianship

2

Long Term Relative Care

VOLUNTEER STATUS SUMMARY

56

Active (Assigned)

+ 4

Available - Unassigned

= 60

Total Volunteers

2

New Volunteers

0

Took Another Case

28

Case Hours

519

Case Miles

4

Volunteers Trained

Click here to set goals

VOLUNTEER TRAINING

10

Inquiries

5

Applications Received

4

Interviews

4

Began Training

0

Training Not Completed

4

Sworn In

4

Completed Training

2

Completed Training / Took Case

0

Left Program

How Heard Summary

3

Agency/Prof

1

Event

3

Local News



casamanager

powered by sunlight

2

*Bonus: Performance 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

Step 1: Choose a Section

All Reports

Casework

Inservices

Staff

Supervisor/Manager

Trainee

Volunteer

State Reports

National Reports

Worksheets

Step 2: Select a Report

🔍 perform

☆ All Reports

☆ Favorites

★ Stats: Performance Report

☆ VA Performance Measures Report

Report Preview: Stats: Performance Report

★ Remove Favorite

Case Status Summary

3/1/2025 - 3/31/2025

ACTIVE AT START OF PERIOD	94
CHILDREN OPENED	1
CHILDREN CLOSED	0
AVERAGE WAIT (DAYS)	67.1
AVERAGE CASE LIFE (MOS)	43.8

98
Children
Served

Volunteer Status Summary

Active during 3/1/2025 - 3/31/2025

ACTIVE IN DATE RANGE	39
INACTIVE IN DATE RANGE	0
TOOK ANOTHER CASE	0
AVERAGE YRS W/ AGENCY	4
CASE HOURS	10
CASE MILES	60

39
Volunteers
Active

CASE OUTCOME

0 20 40 60 80 100 120

Active At Start 94

Opened 1

Closed 0

SERVED BY BREAKDOWN

Monitored:	2
Vol Advocates:	91
Non Advocate Vols:	1
Staff Advocates:	4
Related / Waiting Children:	0
Vol & Staff Adv:	0
# CHILDREN SERVED	98

VOLUNTEER TRAINING

Applications:	0
Interviews:	0
Began Training:	0
Training Not Completed:	0
Sworn In:	1
Completed Training:	1
Completed Training / Took Case:	0
Left Program:	0

Step 3: Run Report

Grayed-out filters are not applicable for the selected report

✕ Clear

📅 Quick Date

Start Date: 1/1/2026

End Date: 12/31/2026

County: All

Program:

Grant:

Special Program:

Include Archive ☐

Run Report

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

By using CasaManager, you build your skill set.

AND

You build your skill set by using CasaManager!