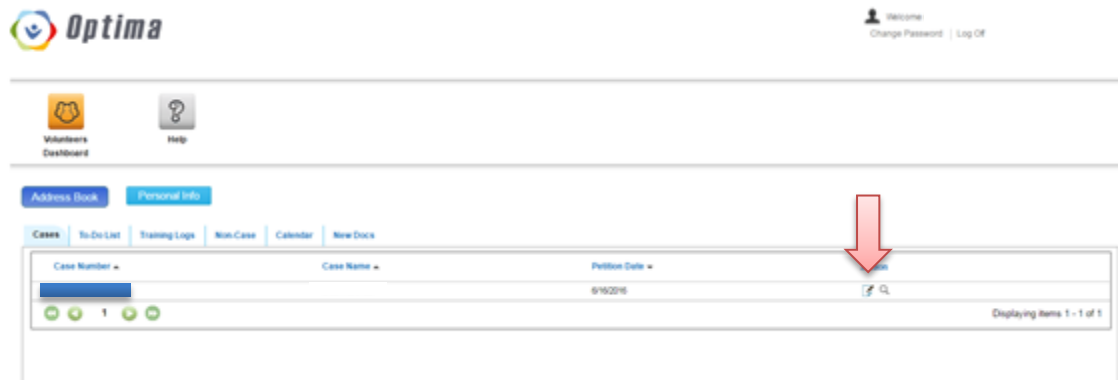


HOW TO INPUT A CONTACT LOG

This is what it looks like after you log in:



1. Click the notepad icon on the far right

ADD

Contact Log

Case Number: _____
Case Name: _____
Activity Date: 11/02/17
Activity Type: General Case Hours
Subject: Visit
Out of Court:
Contact Type: Face-to-Face Contact
Hours: 2
Mileage: _____
Expenses: \$0.00
Notes: We went on a visit to the X12 and we did X12. We talked about X12 and ideas about our next visit.
(97 out of 5000)

Select	Contacted	Party Type
<input type="checkbox"/>		Attorney
<input type="checkbox"/>		Attorney
<input type="checkbox"/>		Caseworker
<input checked="" type="checkbox"/>		Child
<input type="checkbox"/>		Family Member
<input type="checkbox"/>		Family Member
<input type="checkbox"/>		Family Member
<input type="checkbox"/>		Foster Ed Liaison
<input type="checkbox"/>		Individual Therapist

Others Contacted:

First Name: _____
Last Name: _____
Relationship: _____

First Name: _____
Last Name: _____
Relationship: _____

First Name: _____
Last Name: _____
Relationship: _____

First Name: _____
Last Name: _____
Relationship: _____

Cancel Create

1. Fill in necessary information
2. No need to check the "Out of Court" box
3. "Mileage" and "Expenses" is optional if you wanted to track for tax purposes
4. In the "Notes" box, you can be as detailed as you want!
5. On the top right, check the boxes of who the contact was with
6. In the "Others Contacted" section, other people you contact who are not in above Contact box
7. When you are all done, click the **green CREATE** button!

If you are already in the CASE DETAILS page:

Case Information

Case Number
Case Name
County: Santa Cruz County
Jurisdiction
Priority Case?
Petition Date: 6/16/2016
Notes: Petition # as a minor

Legal Status

Type	Date	End Date
No records to display		

Displaying items 0 - 0 of 0

Case Assignments

Name	Type	Supervisor	Assigned	Released	Reason	Contact Info
		<input checked="" type="checkbox"/>	9/29/2017			
	CASA	<input type="checkbox"/>	9/29/2016			
		<input type="checkbox"/>	9/29/2016	9/29/2017		

Displaying items 1 - 3 of 3

Children in Case

Name	AKA/Alias	Gender	Child Age	Close Date	Volunteer	Supervisor	Next Hearing	Action
		Female	18				2/9/2018	<input type="checkbox"/>

1. Scroll down to the bottom of the page

Contact Logs

ADD View Notes Search

Name	Type	Subject	Date	Hours	Status	Action
	General Case Hours		9/19/2017	19.5	Approved	<input type="checkbox"/>
	General Case Hours		9/1/2017	63	Approved	<input type="checkbox"/>
	General Case Hours		7/27/2017	164	Approved	<input type="checkbox"/>

Displaying items 1 - 3 of 3

1. Click the **green ADD** button on top left

ADD

Contact Log

Case Number: _____

Case Name: _____

Activity Date: 11/22/17

Activity Type: General Case Hours

Subject: Visit

Out of Court:

Contact Type: Face-to-Face Contact

Hours: 2

Mileage: _____

Expenses: \$0.00

Notes: We went on a visit to the XX and we did XX. We talked about XX and ideas about our next visit.
(97 out of 5000)

Party Type:

Select	Contacted	Party Type
<input type="checkbox"/>		Attorney
<input type="checkbox"/>		Attorney
<input type="checkbox"/>		Caseworker
<input checked="" type="checkbox"/>		Child
<input type="checkbox"/>		Family Member
<input type="checkbox"/>		Family Member
<input type="checkbox"/>		Family Member
<input type="checkbox"/>		Foster Ed Liaison
<input type="checkbox"/>		Individual Therapist

Others Contacted:

First Name: _____
Last Name: _____
Relationship: _____

First Name: _____
Last Name: _____
Relationship: _____

First Name: _____
Last Name: _____
Relationship: _____

Buttons:

After you click the **green CREATE** button, it will then take you here:

Contact Logs | To Do | Associated Parties | Documents | Petitions and Allegations | Hearings | Placement History

Add View Notes Search

Name	Type	Subject	Date	Hours	Status	Action
	General Case Hours	Visit	11/22/17	2	Pending	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	General Case Hours		9/19/2017	19.5	Approved	<input type="checkbox"/>
	General Case Hours		8/1/2017	63	Approved	<input type="checkbox"/>
	General Case Hours		7/27/2017	154	Approved	<input type="checkbox"/>

Displaying items 1 - 4 of 4

1. You will see that under "Status" it says "Pending"
2. **You're all done!**
3. Your supervisor will go in and approve!

To revise if needed:

Contact Logs | To Do | Associated Parties | Documents | Petitions and Allegations | Hearings | Placement History

Add View Notes Search

Name	Type	Subject	Date	Hours	Status	Action
	General Case Hours	Visit	11/22/17	2	Denied	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	General Case Hours		9/19/2017	19.5	Approved	<input type="checkbox"/>
	General Case Hours		8/1/2017	63	Approved	<input type="checkbox"/>
	General Case Hours		7/27/2017	154	Approved	<input type="checkbox"/>

Displaying items 1 - 4 of 4

1. Click the Notepad icon on the far right

How to look up contact info for Associated Parties (e.g., SW, attorney, FosterEd Liaison, etc.)

The screenshot displays a web application interface. At the top, there is a navigation bar with a 'Family Members' section. Below this, there is a table with columns: Name, AKA, Relationship, Active, Deceased, Contact Info, and Action. The table lists three entries: Father, Maternal Uncle, and Mother. A red arrow points to the 'Associated Parties' tab in the navigation bar. Below the navigation bar, there is another table with columns: Name, Association, Type, Company, Child, Family, Released, Contact Info, and Action. This table lists various associated parties, including Interested Party, Caseworker, and Attorney, with their respective roles and contact information.

Name	AKA	Relationship	Active	Deceased	Contact Info	Action
		Father	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Q
		Maternal Uncle	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Q
		Mother	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Q

Navigation tabs: Contact Logs, To Do, **Associated Parties**, Documents, Petitions and Allegations, Hearings, Placement History

Name	Association	Type	Company	Child	Family	Released	Contact Info	Action
	Interested Party	Individual Therapist		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Q
	Caseworker		Family and Children's Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Q
	Caseworker		Family and Children's Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Q
	Attorney		Chuz Kitz	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Q
	Caseworker		Family and Children's Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Q
	Caseworker		Family and Children's Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Q
	Interested Party	Foster Ed Liaison		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Q
	Caseworker		Family and Children's Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Q
	Caseworker		Family and Children's Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Q
	Caseworker		Family and Children's Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Q

1. Scroll down to bottom of page
2. Click "Associated Parties" tab

HOW TO ACCESS UPLOADED COURT/MISC DOCUMENTS

The screenshot shows a user interface for a legal case. At the top, there is a header with case details: "Female", "18", "Mar Marsh", and "2/9/2018". Below this are three sections: "Current Placements", "Family Members", and "Documents".

- Current Placements:** A table with columns: Name, Placement, From, Reason, With Siblings, Contact Name, Contact Info, and Action. One row is visible: "Relative Home", "2/10/17", "none".
- Family Members:** A table with columns: Name, AKA, Relationship, Active, Deceased, Contact Info, and Action. Rows include "Father", "Maternal Uncle", and "Mother".
- Documents:** A tabbed interface with "Documents" selected. It includes a "Filter by" section with a "Document Type" dropdown and an "Apply" button. Below is a table with columns: File Name, Document Date, Add Date, and Document Type. One row is visible: "Child Note", "3/18/2017", "3/18/2017", "Child Note".

Red arrows point to the "Documents" tab and the magnifying glass icon in the "Documents" table, indicating the steps to access the documents.

1. Scroll down to bottom of page
2. Click "Documents" tab
3. Click Magnifying Glass on far right to download
4. Open download

HOW TO UPLOAD A DOCUMENT

1. Click the **green ADD** button

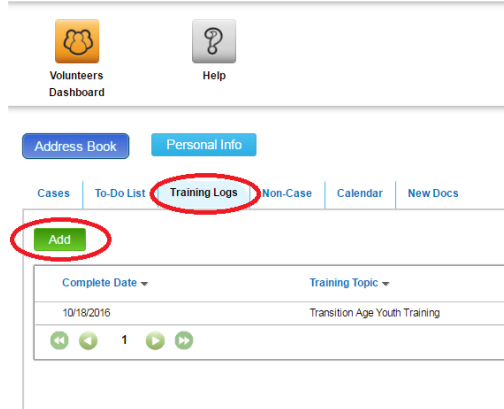
The screenshot shows a "Document" upload form. It includes the following fields and controls:

- ADD** button (green)
- Case** section:
- File Name:** (Click to multi-select) with a "Choose Files" button and "No file chosen" text.
- Document Type:** A dropdown menu with "<< Select Type >>" selected.
- Document Date:** A date input field with "11/20/17" entered.
- Buttons:** "Cancel" (blue) and "Save" (green).

A red arrow points to the "Save" button, indicating the final step in the upload process.

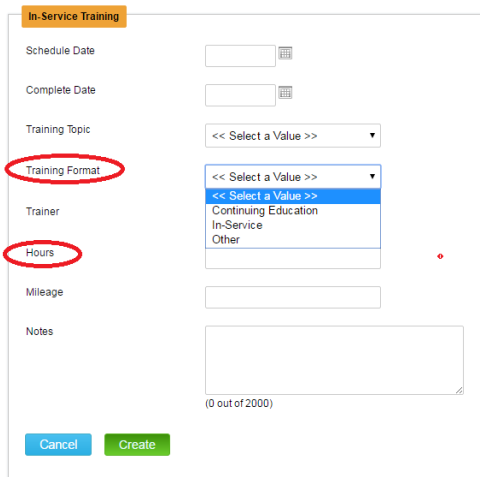
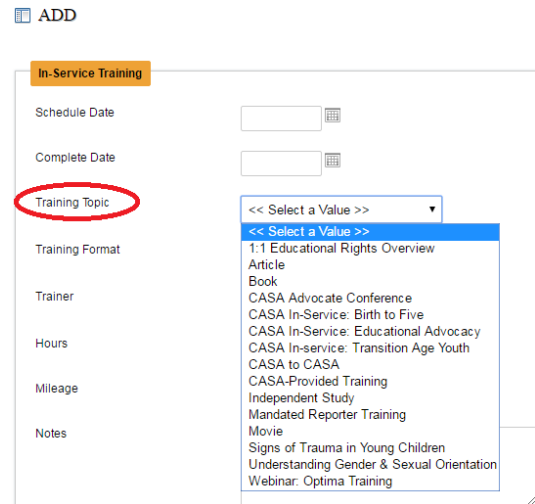
2. Click choose files
3. Enter document type
4. Enter document date
5. Click the **green SAVE** button

HOW TO INPUT CONTINUING EDUCATION HOURS:



1. Click the "Training Logs" tab
2. Click the **green ADD** button

1. Enter in "Schedule Date" & "Complete Date" – it's the same date but both are required
2. Select the appropriate "Training Topic"



- In "Training Format" select **Continuing Education** (e.g., article, book, independent study, movie, mandated reporter training, or any non-CASA training) or **In-Service** (e.g., any CASA training)

a. **NOTE:** *if you attend a training put on by CASA, you do not need to enter it as we will do it for you!*

- Enter your hours (book = 3 hours, movie = 2 hours)
- Mileage isn't required unless you wanted to track for your own/tax purposes
- In "Notes" please put in the title if you read an

article, book, did independent study, or watched a movie.

- Click the **green CREATE** button
- You're all done! Your supervisor will then approve your training log.