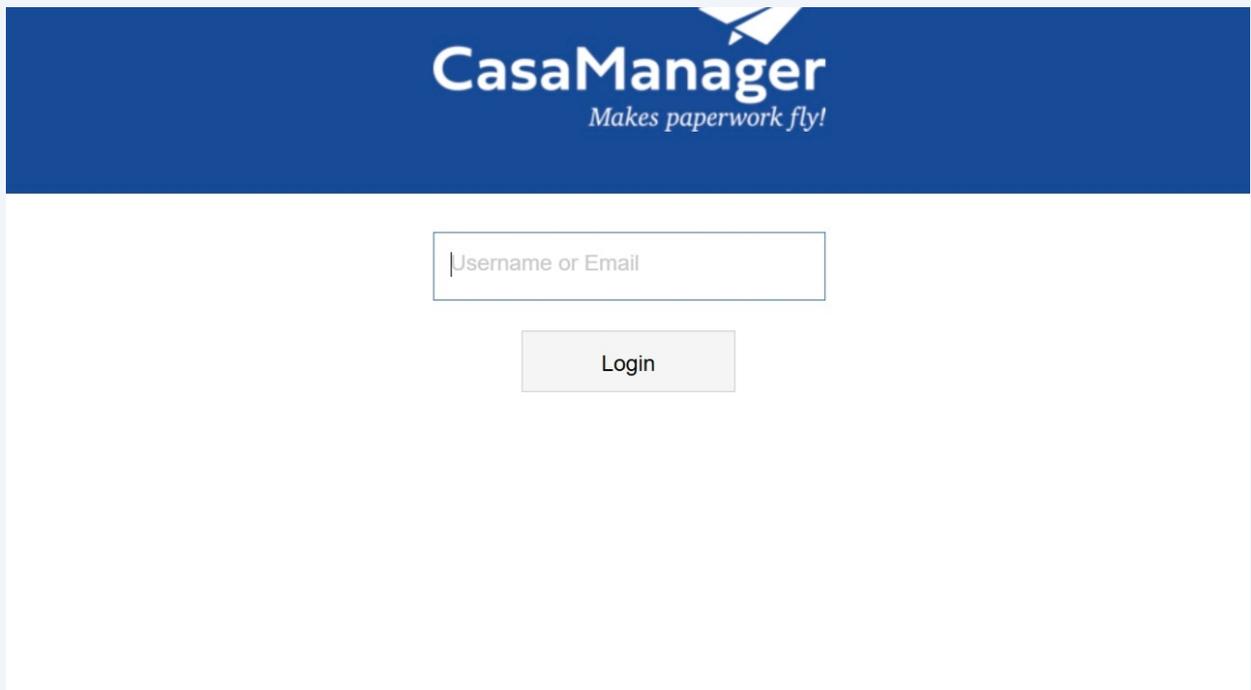


 To log case notes in CASA Manager please follow the directions below.

1 Navigate to <https://login.casamanager.com>

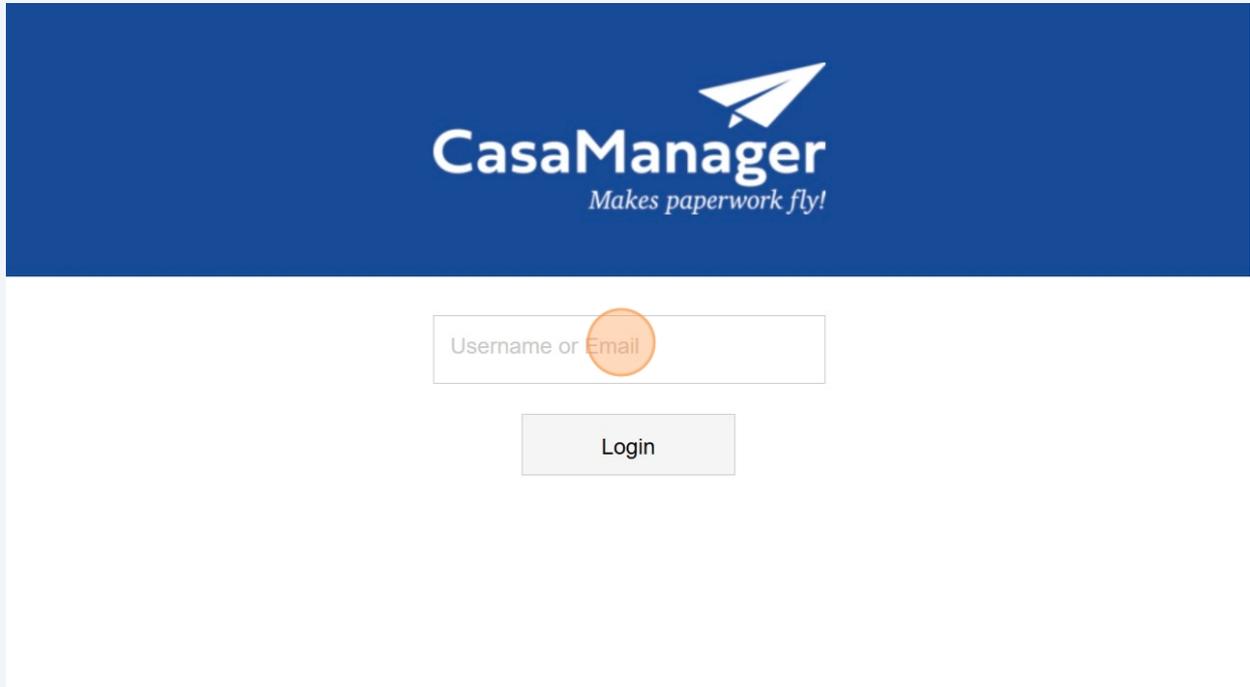


The screenshot shows the login page for CasaManager. At the top, there is a dark blue header with the CasaManager logo and the tagline "Makes paperwork fly!". Below the header, there is a white input field with the placeholder text "Username or Email". Below the input field, there is a grey "Login" button.

2

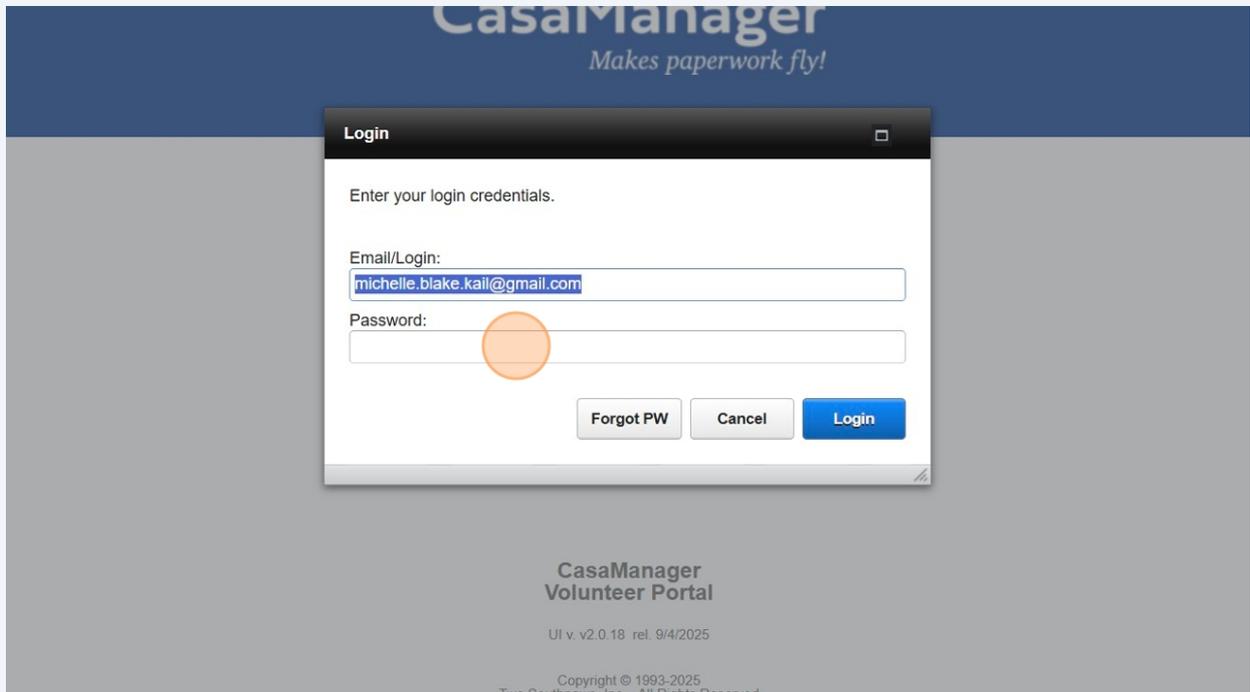
Type in your CASA email to sign in. The beginning of your CASA email should be the first letter of your first name and your full last name. Your email ends in @casaheartland.org .

Next click "Login".

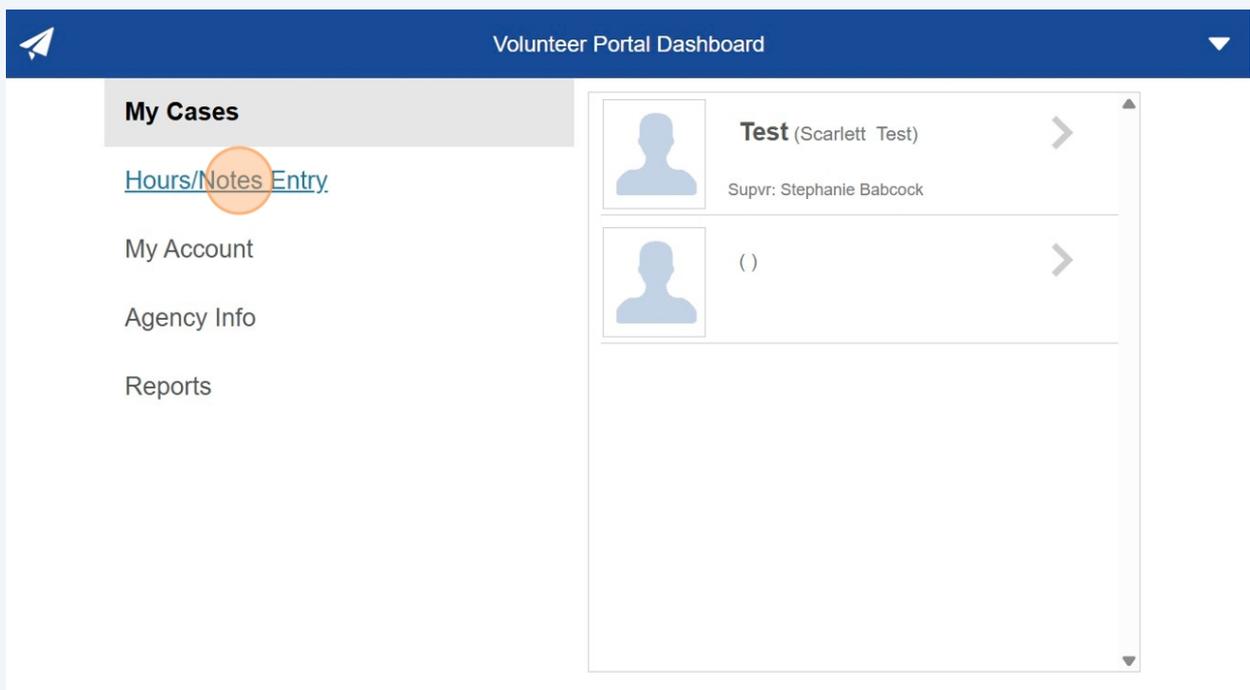


3 Enter your password and then click Login.

IF you for get your password, click the "Forgot PW" button and CASA Manager will send a link to your CASA email. Follow the instructions to reset your password.



4 This is the screen that appears when you login. To enter a case note, Click "Hours/Notes Entry".



5 Click "Family Related Hours/Notes".

The screenshot shows the 'Volunteer Portal Dashboard' with a dark blue header. On the left is a navigation menu with items: 'My Cases', 'Hours/Notes Entry' (highlighted in grey), 'My Account', 'Agency Info', and 'Reports'. On the right, there is a light blue box with the text 'Which type of Note/Hour do you want to create?'. Below this box are two links: 'Family Related Hours/Notes' (underlined and circled in orange) and 'Independent Training'.

6 Click "Family" and select the family name.

The screenshot shows the 'Family Related Hours/Notes Entry' form. At the top is a dark blue header with the text 'Family Related Hours/Notes Entry'. Below the header, there is a 'Family' dropdown menu with the text '** Required **' and a downward arrow. The dropdown menu is open, showing a list of options with 'Test' selected and circled in orange. Below the dropdown is a 'Date' field with the text 'Test' and a calendar icon. Below the date field is a 'Select Children' section with a scrollable list. At the bottom of the form is a 'Hours Detail' section with a light blue header. It contains a 'Total Hours' field with a blue circular icon to its left and a 'Type' dropdown menu.

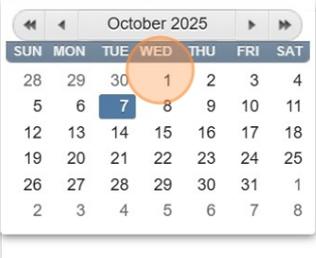
7

Select the date you completed the service/visit. Do not enter today's date unless the casework was completed today.

Family Related Hours/Notes Entry

Family

Date 

Select Children 

Hours Detail

Total Hours

Type

8

Click the names of the children the note is related to. Once you have clicked on them, they should be highlighted blue.

Family Related Hours/Notes Entry

Family

Date 

Select Children

Hours Detail

Total Hours

Type

9

Enter the total amount of time spent completing the visit/completing case work.

Please note, you do not have to enter notes/logs for time spent entering notes on your case, talking to your Advocate Coordinator, or writing your CASA report. However, you are certainly welcome to.

Family Related Hours/Notes Entry

Hours Detail



Type

Activity

Mileage

Visits

Contacts

Note Details

Note Source

10

Click the box next to "Type". Select the best choice for the case work you are logging at this time.

Hours Detail

Total Hours

Type

Activity

Mileage

Visits

Contacts

Note Details

Note Source

Note Type

11

Click the box next to "Activity". Select the best choice for the case work you are logging at this time.

Hours Detail

Total Hours

Type

Activity

Mileage

Visits

Contacts

Note Details

Note Source

Note Type

12

Logging your mileage is optional. If you would like to have a print out at the end of the year with the number of miles you drove for your casework, log your miles here. If you filed for mileage reimbursement, do not log your miles here. If you completed a phone call or virtual visit, enter 0.

The screenshot shows a form with the following fields: "Total Hours" with a value of 1; "Type" set to "Virtual Visit"; "Activity" set to "Child Contact-Out of Court"; "Mileage" with a value of 0; "# Visits" and "# Contacts" are empty. Below these is a "Note Details" section with "Note Source" and "Note Type" fields. A blue bar at the bottom contains a "Submit" button.

13

For the "# Visits" enter 1 if you are logging completing one visit or talking to one school on that day. However, if on the same day you went to the school and to visit the child at their home and you are logging both on the same log, you would put a 2 in this box.

The screenshot shows a form with the following fields: "Total Hours" is empty; "Type" set to "Virtual Visit"; "Activity" set to "Child Contact-Out of Court"; "Mileage" with a value of 0; "# Visits" with a value of 1; "# Contacts" is empty. Below these is a "Note Details" section with "Note Source" and "Note Type" fields. A blue bar at the bottom contains "Cancel" and "Submit" buttons.

14

For "# Contacts" type in the number of adults that you talked to as well as the number of children that you saw (so total number of people you interacted with).

Mileage

Visits

Contacts

Note Details

Note Source

Note Type

Topics/Activities

Note

15

For "Topics/Activities" if you went to court, select Hearing Note. If you are not logging information from court, everything else you should chose "CASA".

Visits

Contacts

Note Details

Note Source

Note Type

Topics/Activities

Note

VOCA Services Detail

Service / Subtype / Quantity

16 Click "Topics/Activities"

Visits 1

Contacts 2

Note Details

Note Source CV talk with Scarlett and FM via Zoom

Note Type CASA

Topics/Activities ** Select **

Note ** Required **

VOCA Services Detail

Service / Subtype / Quantity

17 Choose the appropriate VOCA code from the "Topics/Activities" drop down. If you are unsure, look at your VOCA codes document for help choosing the correct code. You may select more than one VOCA code from the list.

Select Topics/Activities

- A1. Information about the criminal justice process
- A2. Information about victims' rights, how to obtain notifications, etc.
- A4. Referral to other services, supports, and resources (includes legal, medical, faith-based organizations, address confidentiality programs, etc.
- B10. Interpreter Services
- B4. Individual Advocacy
- B7. Intervention with an employer, creditor, landlord, or academic institution
- B8. Child or Dependent Care Assistance (includes coordination of services)
- B9. Transportation Assistance (includes coordination of services)
- C1. Emotional Support/C1. Crisis Intervention (All Contacts with Child)
- C7. Emergency Financial Assistance
- F1. Volunteer Supervision
- G1. Any Non-VOCA Services

VOCA Services Detail

18 Click in an area off of the menu to hide the list.

Note Details

- B7. Intervention with an employer, creditor, landlord, or academic institution
- B8. Child or Dependent Care Assistance (includes coordination of services)
- B9. Transportation Assistance (includes coordination of services)
- C1. Emotional Support/C1. Crisis Intervention (All Contacts with Child)
- C7. Emergency Financial Assistance
- F1. Volunteer Supervision
- G1. Any Non-VOCA Services

VOCA Services Detail

Service / Subtype / Quantity

VOCA Services (assigned to) Select Service

Cancel Submit

19 For "Note" this is where you enter a detailed description of what happened at the visit, on the phone call, while talking to the school, etc. The more detailed the better. Remember, if you typed it up in another document and need to copy paste it in this box, you have to use your keyboard shortcuts: copy "ctrl c" paste "ctrl v".

Contacts 2

Note Details

Note Source CV talk with Scarlett and FM via Zoom

Note Type CASA

Topics/Activities 1 selected

Note **** Required ****

VOCA Services Detail

Service / Subtype / Quantity

VOCA Services (assigned to) Select Service

20 Click here.

Family Related Hours/Notes Entry

to video chat with CV. Scarlett talked about playing tug-of-war, hopscotch, and Red Rover. Scarlett was very excited and had a lot of fun. |

VOCA Services Detail

Service / Subtype / Quantity

VOCA Services (assigned to each child) Select Service

21 Click the box next to "VOCA Services". From the dropdown, choose the description that matches the case activity that you completed. VOCA categories include: A. Information & Referral B. Personal Advocacy & Accompaniment C. Emotional Support.

to video chat with CV. Scarlett talked about playing tug-of-war, hopscotch, and Red Rover. Scarlett was very excited and had a lot of fun. |

VOCA Services Detail

Service / Subtype / Quantity

VOCA Services (assigned to each child) Select Service

Emotional Support

Information & Referral

Personal Advocacy & Accompaniment

Training & Conference

VOCA Admin & Documentation

Volunteer Supervision

22 Click "Subtype".

to video chat with CV. Scarlett talked about playing tug-of-war, hopscotch, and Red Rover. Scarlett was very excited and had a lot of fun.

VOCA Services Detail

Service / Subtype / Quantity

VOCA Services
(assigned to
each child)

Emotional Support

Subtype

Qty

Select Service

23 Click the appropriate choice from the dropdown menu.

VOCA Services Detail

Service / Subtype / Quantity

VOCA Services
(assigned to
each child)

Emotional Support

Subtype

C1. Crisis Intervention, Contact with Child

Select Service

24

Type "1" for the quantity. If you completed more than one VOCA service at the visit, then click the tan "Select Service" box below and repeat the process. If you only completed the one VOCA service, you are done with the "VOCA Services" section.

VOCA Services Detail

Service / Subtype / Quantity
Emotional Support C1. Crisis Intervention, Contact with Child 1

Select Service

Cancel Submit

25

Click the rectangle next to "Signed*". Once you have clicked it, it will turn blue.

1

Select Service

Signature

Signed* Marking this box, I certify that this information is true and accurate. Once checked/submitted, this record may not be edited.

Cancel Submit

26 Click "Submit"

A screenshot of a web form. At the top, there is a text input field containing the number '1'. Below it is a large grey rectangular area with the text 'Select Service'. Underneath this is a blue horizontal bar with the word 'Signature' in white. Below the bar, there is a label 'Signed*' followed by a blue square checkbox and the text 'Marking this box, I certify that this information is true and accurate. Once checked/submitted, this record may not be edited.' At the bottom of the form, there are two buttons: a light blue 'Cancel' button on the left and a dark blue 'Submit' button on the right. A red circle highlights the 'Submit' button. A vertical scrollbar is visible on the right side of the form, and a horizontal scrollbar is visible at the bottom.

 To to view past case notes, use the following steps.

27

Now you will be back at the home screen. From here, if you would like to see the note that you entered or any past notes, click "My Cases". Click the arrow on the right next to the case that you would like to select.

Volunteer Portal Dashboard

My Cases

- Hours/Notes Entry
- My Account
- Agency Info
- Reports

Test (Scarlett Test)
Supvr: Stephanie Babcock

()

28

Click "Notes"

Date of Birth

No Next Hearing

Child/Case Background

Current Child Professionals (-)

Hearings (-)

Hours (2)

Notes (4)

Placements (-)

Documents (1)

Services (4)

29

A list of notes should appear on the right. Click the arrow at the right of the note to see the details of the note.

Case Detail

Test (Scarlett Test)

Supvr: Stephanie Babcock

Date of Birth: [] No Next Hearing: []

Child/Case Background

Current Child Professionals (-)

Hearings (-)

Hours (2)

Notes (4)

Placements (-)

Documents (1)

Family Notes (4)

- 10/6/2025 - CASA
Family Note - Created by: Demo Volunteer
- 10/4/2025 - CASA
Family Note - Created by: Demo Volunteer
- 9/15/2025 - CASA
Family Note - Created by: Demo Volunteer
- 9/15/2025 - CASA
Family Note - Created by: michelle.blake.kail@gmail.com

30

The note will have a different format here than on the screen where you entered it in originally however, the overall details from the note you entered still appear.

Case Note Entry

Date: 10/06/2025

Note Source: CV called school counselor

Source Phone: []

Type of Note: CASA

Topic:

- A1. Information about the criminal justice process
- A2. Information about victims' rights, how to obtain notifications, etc.
- A4. Referral to other services, supports, and resources (includes legal, medical, faith-based organizations, address confidentiality programs)
- B10. Interpreter Services
- B4. Individual Advocacy
- B7. Intervention with an employer, creditor, landlord, or academic institution
- B8. Child or Dependent Care Assistance (includes coordination of services)
- B9. Transportation Assistance (includes coordination of services)
- C1. Emotional Support/C1. Crisis Intervention (All Contacts with Child)
- C7. Emergency Financial Assistance

Note: CV called school to get grade, behavior, and attendance. CV also shared that child has an IEP from a previous school and wanted to ensure it is on file and scheduled for review with current school.

31 To get out of the note, Click "Close".

Topic

- A1. Information about the criminal justice process
- A2. Information about victims' rights, how to obtain notifications, etc.
- A4. Referral to other services, supports, and resources (includes legal, medical, faith-based organizations, address confidentiality programs)
- B10. Interpreter Services
- B4. Individual Advocacy
- B7. Intervention with an employer, creditor, landlord, or academic institution
- B8. Child or Dependent Care Assistance (includes coordination of services)
- B9. Transportation Assistance (includes coordination of services)
- C1. Emotional Support/C1. Crisis Intervention (All Contacts with Child)
- C7. Emergency Financial Assistance

Note

CV called school to get grade, behavior, and attendance. CV also shared that child has an IEP from a previous school and wanted to ensure it is on file and scheduled for review with current school.

Read Only Lock Enabled. No changes will be recorded.

Close

32 You can navigate to see hearing dates, placement information, etc. from this screen as well. Just click on the corresponding button at the left.

To get out of the case and back to the screen where you can enter notes, Click "the house" in the top left of the screen.

 Case Detail

 **Test (Scarlett Test)**
Supvr: Stephanie Babcock

 May 5, 2020 (5 yrs)
Date of Birth

 No Next Hearing

Child/Case Background

Current Child Professionals (-)

Hearings (-)

Hours (2)

Notes (4)

Family Notes (4)

- 10/6/2025 - CASA
Family Note - Created by: Demo Volunteer
- 10/4/2025 - CASA
Family Note - Created by: Demo Volunteer
- 9/15/2025 - CASA
Family Note - Created by: Demo Volunteer



To edit your settings, use the following steps.

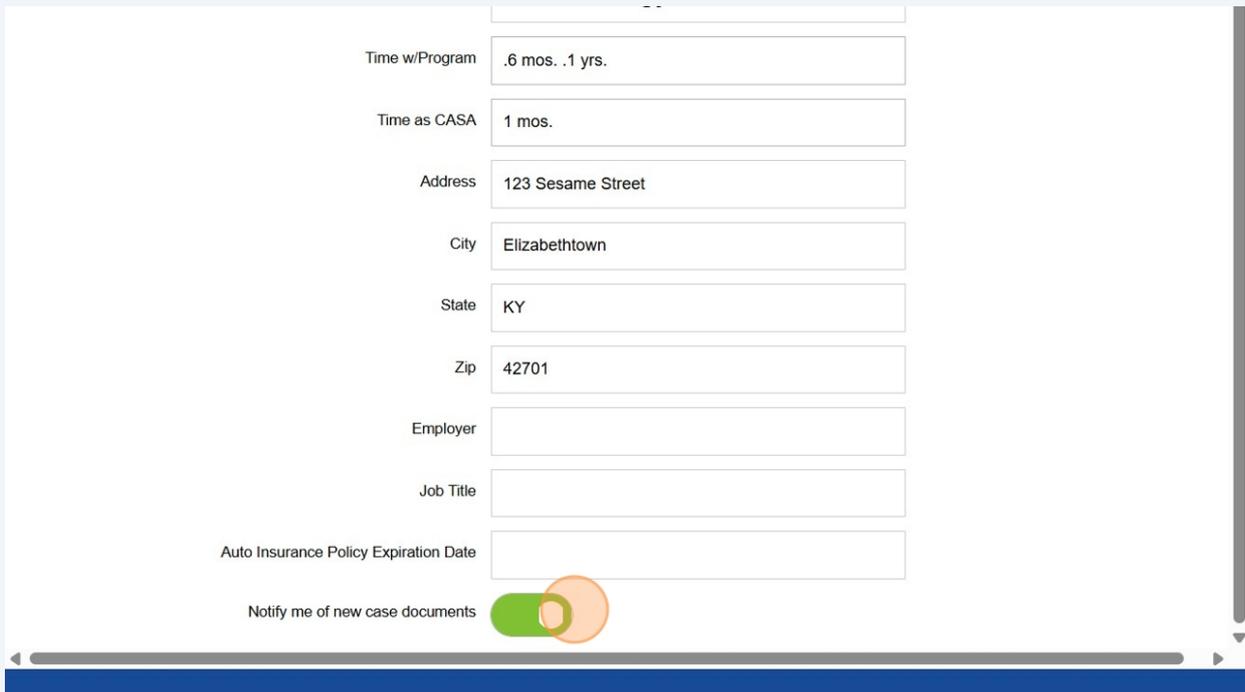
33

One more important note. If you would like to turn off the email notifications for when I upload a document into your case, Click "My Account".

The screenshot shows the 'Volunteer Portal Dashboard' with a dark blue header. Below the header, there is a navigation menu with 'My Cases' highlighted in grey. To the right of 'My Cases' is a light blue button that says 'Which type of Note/Hour do you want to create?'. Under 'My Cases', there are several links: 'Hours/Notes Entry', 'Family Related Hours/Notes', 'My Account' (highlighted with an orange circle), 'Independent Training', 'Agency Info', and 'Reports'.

34

Scroll to the bottom and click "Notify me of new case documents". If it is green, it is on. If it is white, it is turned off.

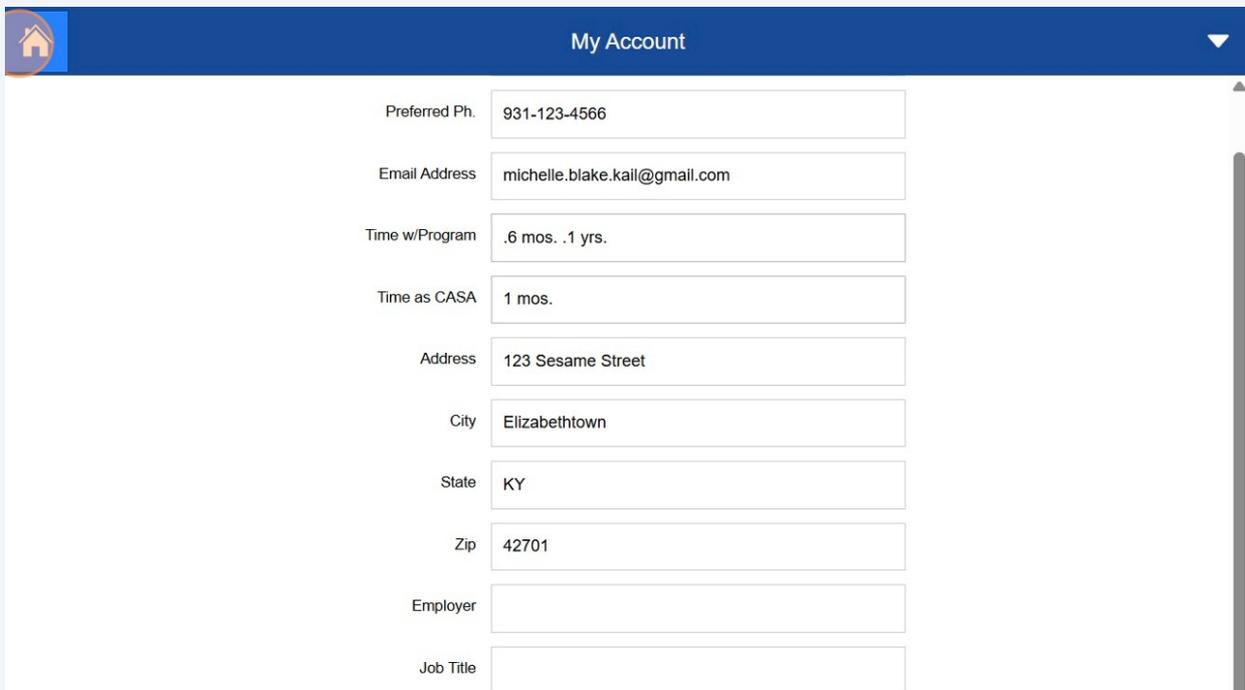


A screenshot of a web form with a vertical scrollbar on the right. The form contains the following fields:

- Time w/Program: .6 mos. .1 yrs.
- Time as CASA: 1 mos.
- Address: 123 Sesame Street
- City: Elizabethtown
- State: KY
- Zip: 42701
- Employer: (empty)
- Job Title: (empty)
- Auto Insurance Policy Expiration Date: (empty)
- Notify me of new case documents: A toggle switch is shown in the 'on' position, with a green circle on the left and an orange circle on the right.

35

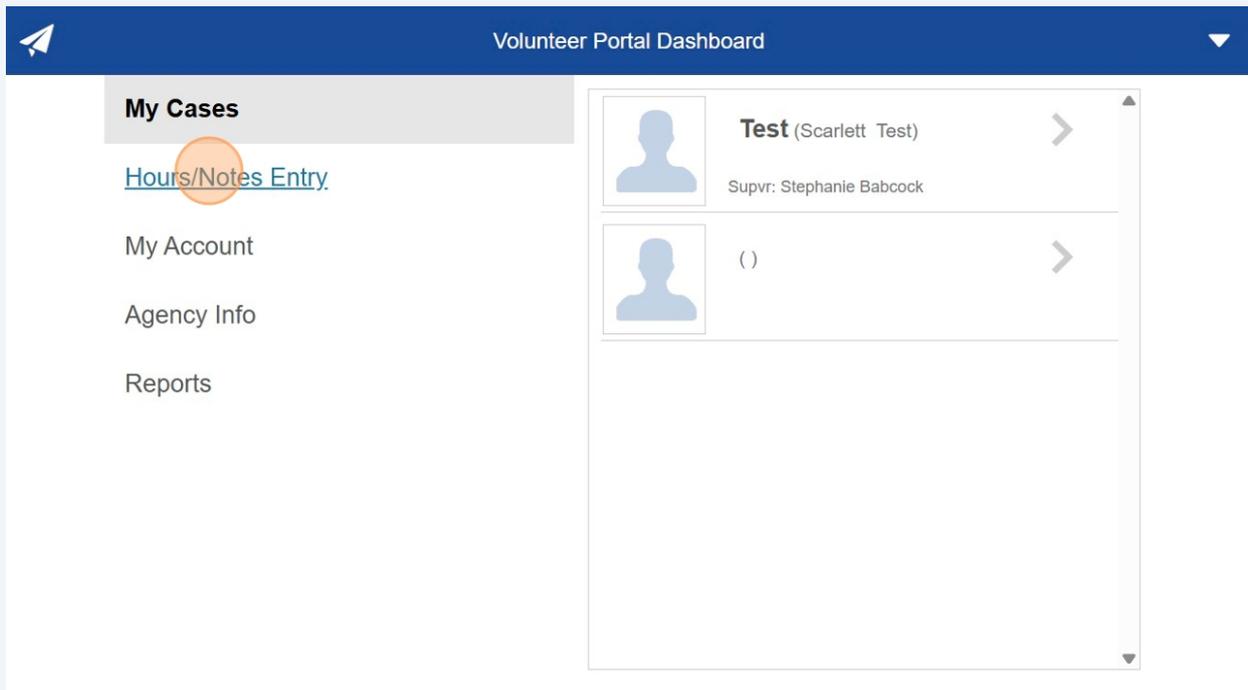
To exit click the house at the top left.



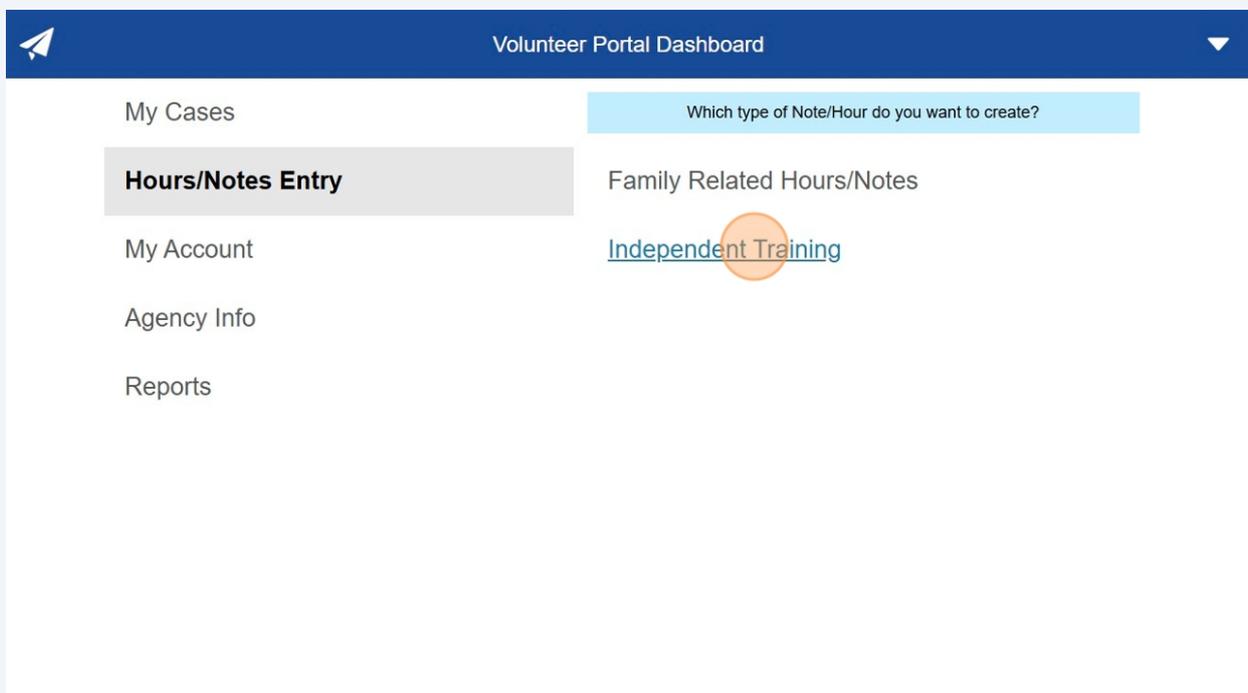
A screenshot of a 'My Account' page. At the top, there is a blue header with a home icon on the left and the text 'My Account' with a dropdown arrow on the right. Below the header, the form contains the following fields:

- Preferred Ph.: 931-123-4566
- Email Address: michelle.blake.kail@gmail.com
- Time w/Program: .6 mos. .1 yrs.
- Time as CASA: 1 mos.
- Address: 123 Sesame Street
- City: Elizabethtown
- State: KY
- Zip: 42701
- Employer: (empty)
- Job Title: (empty)

36 To enter CEUs/Training Hours Click "Hours/Notes Entry" from the menu at the left.



37 Click "Independent Training"



38 Choose the date your training was completed.

Independent Training Entry

Date 

Hours

Mileage

Type

Topic

Paid

October 2025

SUN	MON	TUE	WED	THU	FRI	SAT
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

39 Enter the number of hours you spent on the training.

Independent Training Entry

Date 

Hours

Mileage

Type

Topic

Paid

40

Enter the "Mileage" this is the distance you drove to the training and back. If it was a virtual training, enter zero.

Independent Training Entry

Date 

Hours

Mileage

Type

Topic

Paid

41

Click "Type". Then select the type of training you completed.

Mileage

Type

Topic

Paid

- Book
- CLE
- Conference
- Movie
- Other
- Seminar
- Support Group
- Webinar**

42

Type the name of your training in the "Topic" section. Or select something from the drop down.

Date 

 Hours

Mileage

Type 

Topic 

Paid 

43

Enter the amount you paid to attend the training if anything.

 Hours

Mileage

Type 

Topic 

Paid



44

Click "Submit"

Mileage

Type

Topic

Paid