



WELCOME!

VOLUNTEER PORTAL TRAINING FOR STAFF



CasaManager

Makes paperwork fly!



Volunteer Portal Training for Staff

Thank you all for participating in this session to learn about the volunteer platform for volunteers. It is important that staff sees this functionality so that you know what your volunteers will see.

As we move through the training, please feel free to ask questions. If I can't respond to them all before the end of our session, please email me. My contact information is on the last slide.



Key Focus Area

This training covers the functions and features of the volunteer portal for volunteers and what responsibilities agency staff has to give access to your volunteers.

The training is ideal for all program staff who supervises volunteers and are responsible for keeping casework data and volunteers' hours and continuing education trainings updated.



About the Facilitator: 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 25+ years.
- CasaManager, Volunteer Portal, VisitationManager & MentorManager Expert and Trainer

I LOVE our suite of products!



Introduction: What is the Volunteer Portal?

The volunteer portal is a case management system designed specifically **for** volunteers at the request **of** volunteers. This system affords volunteers the ability to update case information as well as their hours.

The volunteer portal is free for any volunteer whose CASA/GAL agency is using CasaManager (CM). While it is free, it is also optional; we do not force any volunteer or their agency to use it. While most volunteers would like to use it, no agency will get to 100% volunteer participation and that's okay. Every volunteer who elects to use the volunteer portal is helping their CASA/GAL staff by reducing the amount of clerical work staff currently does.



Learning to Let Go!

One of the biggest challenges that my staff and I had was letting go! What does that mean?

We felt this need to control everything our volunteers did, and that also translated to their use of the VP. We fought it and debated it and debated it and fought it! Then one day we all had this 'ah-ha' moment. Our caseloads increased exponentially and my staff was drowning in clerical work. That was a turning point for me. I knew I had to help offload some of this work, so I got buy-in from all of my staff to begin letting go so that they could breathe.



What Happened Next?

When we mapped out how much we already trusted our volunteers to do home visits on their own, contact schools/daycares, contact and meet with professionals and collateral contacts, observe parent-child interactions, attend staffings, foster care reviews, and court, we really didn't have any reason to oppose them adding their own case updates (which they were already writing in a notebook). So we let go and we asked ourselves why we didn't do that sooner.



How Did We Roll This Out?

We didn't want to blindside our volunteers, so we took these steps:

- Wrote two articles in our newsletter, informing them of this new opportunity and why we were moving in this direction.
- Gave them information on what the Volunteer Portal is and how it would be a benefit to them and my staff.
- Provided a date that they would receive their VP access from me.
- Provided mandatory training for all volunteers who chose to use it.
- Made VP mandatory for all newly trained advocates.



LET'S GET STARTED! (What Does Staff Need to Do?)

- Someone with admin privileges has to turn the volunteer portal access on.
- Someone with admin privileges has to determine which areas of access you want your volunteers to see and use.
- Someone with admin privileges has to enable the volunteer accounts.

LET'S GET STARTED! (What Does Staff Need to Do?)

Agency Preferences

General

Blue Bar Navigation

Tab Panels

Required Fields

Field Labels

Volunteer Portal

Volunteer Portal Settings

Welcome

My Cases

Hours/Notes Entry

VOCA Services Entry

Measures

Supervised Visits

My Account

Agency Info

Reports

Activation Message

Users

The all new Volunteer Portal provides your CASA volunteers with real time/direct access to their assigned cases.

Use the buttons on the left to customize the portal settings. If your agency doesn't use something, disable it.

The value lists you have defined for CasaManager will automatically be available in the portal.

Portal Enable/Disable:

☒

Portal Settings:

My Cases - Enabled

Hours/Notes Entry - Enabled

VOCA Services Entry - Enabled

Measures - Enabled

Supervised Visits - Enabled

My Account - Enabled

Agency Info - Enabled

Reports - Enabled

Use Preset

Cancel

Submit

Volunteer Portal Dashboard

Volunteer Portal Dashboard

My Cases

Hours/Notes Entry

VOCA Services Entry

Measures

Supervised Visits

My Account

Agency Info

Reports



Broadnax/Johnson (Pearl Harwood) >

Supvr: Carmella Evans



Helmick (Jaden Helmick) >

Supvr: Gina James



Helmick (Jaynae Helmick) >

Supvr: Gina James



Owens/Wright/Wherry (Travis Owens) >

Supvr: Gina James



Owens/Wright/Wherry (Candace Wright) >

Supvr: Gina James



VOLUNTEER PORTAL WORKFLOW: LET'S DIVE IN!

- How do volunteers log in?
- Compatibility
- Volunteer Portal Dashboard Buttons
 - My Cases
 - Child/Case Background
 - Professionals
 - Hearings
 - Hours
 - Notes
 - Placements
 - Education
 - Health
 - Documents
 - Services



VOLUNTEER PORTAL WORKFLOW (Cont'd)

- Hours/Notes Entry
 - VOCA Services Entry
 - Measures
 - Supervised Visits
 - My Account
 - Agency Info
 - Reports
-
- What we noticed about volunteers' diligence.
 - What Does Staff See in CM?

CasaManager Volunteer Portal Notification

- How does staff know when volunteers add data in the Volunteer Portal?
- Why are there two different numbers?

Volunteer Portal Notifications
to Review (All Unreviewed)


194

Your Notifications

238

All Notifications

*Updated 6/10/2025 2:53:01 AM



Volunteer Portal Notification

➤ Making sense of the data

Volunteer Portal Data Review

SuperSearch...

Staff Family/Child Casework Facility/School Interv/Outreach Professionals Volunteers Reports

Dashboard Agency Info Customize Calendar Viewer National Survey CM Site Map Performance Report

Downloaded from Volunteer Portal ☒ Timeframe: All Unreviewed Supervisor: James,Gina ☒ ☒ Review All

Filter by Date

	Supv	Volunteer Name	Child Name	Date	VOCA	Hrs	Mileage	Linking amount	Visits	#Con	Contact	Reviewed
Hearings (10)	15	James, Gina	Steele, Iyonna	9/18/2023	<input checked="" type="checkbox"/>	2			3	8	Wrote Report	<input type="checkbox"/>
Hours Overview (104)	15	James, Gina	Steele, Cassandra "Cassie"	9/29/2023	<input type="checkbox"/>	.5	3		2	4	Staffing	<input type="checkbox"/>
Case Hours (75)	15	James, Gina	Steele, Patrice "Tecie"	9/29/2023	<input type="checkbox"/>	.5	3		2	4	Staffing	<input type="checkbox"/>
			Helmick		<input type="checkbox"/>						Monthly	<input type="checkbox"/>

Filter by Supervisor

Chasten,Deborah
Evans,Carmella
James,Gina
Kravchuk,Alison
Spaulding,Diane

Monthly Staffing

Volunteer Portal Notification

➤ Making sense of the data

Volunteer Portal Data Review											
SuperSearch...											
Staff Family/Child Casework Facility/School Interv/Outreach Professionals Volunteers Reports											
Dashboard Agency Info Customize Calendar Viewer National Survey CM Site Map Performance Report											
Hours Overview (104)	15	James, Gina	Steele, Patrice "Tecie"	3/10/2025	<input type="checkbox"/>	.42	6	1	Collateral Contacts	Attended Hearing	<input type="checkbox"/>
Case Hours (75)	15	James, Gina	Steele, Iyonna	3/10/2025	<input type="checkbox"/>	.42	6	1	Collateral Contacts	Attended Hearing	<input type="checkbox"/>
In-Service Training (19)	15	James, Gina	Helmick, Jaynae	3/19/2025	<input checked="" type="checkbox"/>	1	1	2	Wrote Court Report	Wrote Court Report	<input type="checkbox"/>
Independent Study Hours (10)	15	James, Gina	Steele, Iyonna	5/12/2025	<input checked="" type="checkbox"/>	.75	8	1	7 Staffing	Monthly Staffing	<input type="checkbox"/>
Vol (non-case) Hours (-)	15	James, Gina	Steele, Cassandra "Cassie"	4/29/2025	<input type="checkbox"/>	.42	11.67	1	3 Court	Attended Hearing	<input type="checkbox"/>
Notes Overview (65)	15	James, Gina	Steele, Iyonna	4/29/2025	<input type="checkbox"/>	.42	11.67	1	3 Court	Attended Hearing	<input type="checkbox"/>
Documents (2)	15	James, Gina	Steele, Patrice "Tecie"	4/29/2025	<input type="checkbox"/>	.42	11.67	1	3 Court	Attended Hearing	<input type="checkbox"/>
Measures (-)	15	James, Gina	Helmick, Jaden	5/8/2025	<input checked="" type="checkbox"/>	.5	15	1	2 Youth Contact	Monthly Home Visit	<input type="checkbox"/>
Monitoring (-)	15	James, Gina	Steele, Cassandra "Cassie"	5/15/2025	<input type="checkbox"/>	.44	2	1	8 Court	Attended Hearing	<input type="checkbox"/>
VOCA Services (13)	15	James, Gina	Steele, Iyonna	5/15/2025	<input type="checkbox"/>	.44	2	1	8 Court	Attended Hearing	<input type="checkbox"/>
	15	James, Gina	Steele, Patrice "Tecie"	5/15/2025	<input type="checkbox"/>	.44	2	1	8 Court	Attended Hearing	<input type="checkbox"/>



Thank you for your time!

If you have additional questions,
please contact me:

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