



VOLUNTEER PORTAL TRAINING FOR VOLUNTEERS

CasaManager
Makes paperwork fly!



About Your 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!



Volunteer Portal Training for Volunteers

Thank you all for participating in this session to learn more about the volunteer platform for volunteers. It is important that you see this functionality so that you know what your workflow looks like.

As we move through the training, please feel free to ask questions.

*Note: Please consult with your direct supervisor for specific guidance as your access may differ from mine.



Key Focus Area

This training covers the functions and features of the volunteer portal for volunteers. This training also defines the volunteers' responsibilities.

The training is ideal for all volunteers who wish to use this free platform.



NOTE TO STAFF

If you are trying to activate your volunteers during this session and something isn't working, you can't find the buttons, etc., I cannot stop during the training to resolve your issues. Please email me and I will reply once the session is done.

To that point, I would recommend that you **NOT** activate your volunteers during this session. This will distract you and your volunteers from learning about their workflows.



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).



VOLUNTEER PORTAL: COMPATIBILITY

- What device can volunteers use to access the Volunteer Portal?
 - The Volunteer Portal is compatible with Apple and Android products.
 - You can use a cell phone, a tablet, a laptop, and a desktop computer.



VOLUNTEER PORTAL: LOGGING IN

- How do volunteers log in?
 - Your agency will activate your account in CasaManager.
 - You will receive an auto-generated email from CasaManager, with instructions on how to log in using your email address.
 - *Note:** The email address you use must match the email address you provided to your CASA/GAL agency. If you change your email address, you need to notify your supervisor.



LET'S GET STARTED! (Volunteer Responsibilities)

- Log into the volunteer portal as often as you'd like.
- Update your case data and training hours.
- Do not share your log in credentials with anyone.
- Do not remain logged in if your personal device is accessible by family, friends, or the public (remember that all of the information on your cases is highly confidential).
- Communicate with your supervisor if you have any questions.



VOLUNTEER PORTAL DASHBOARD

- My Cases
- Hours/Notes Entry
- VOCA Services Entry
- Measures
- Supervised Visits
- My Account
- Agency Info
- Reports

*NOTE: Your agency controls what you have access to, so you may not have the same functions you see on my screen.

Volunteer Portal Dashboard

Volunteer Portal Dashboard

My Cases

Hours/Notes Entry

VOCA Services Entry

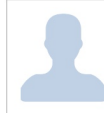
Measures

Supervised Visits

My Account

Agency Info

Reports



Broadnax/Johnson (Pearl Harwood) >

Supvr: Carmella Evans



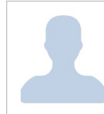
Helmick (Jaden Helmick) >

Supvr: Gina James



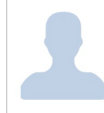
Helmick (Jaynae Helmick) >

Supvr: Gina James



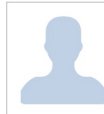
Owens/Wright/Wherry (Travis Owens) >

Supvr: Gina James



Owens/Wright/Wherry (Candace Wright) >

Supvr: Gina James



Porter/Steele (Iyonna Steele) >

Supvr: Gina James

Show closed cases






VOLUNTEER PORTAL CASE NAVIGATION

- My Cases>Drill Down To:
 - Child/Case Background
 - Current Child Professionals
 - Hearings
 - Hours
 - Notes
 - Placements
 - Education
 - Health
 - Documents
 - Services

Volunteer Portal Case Drill Down

Case Detail



Broadnax/Johnson (Pearl Harwood)
Supvr: Carmella Evans

Date of Birth

No Next Hearing

Child/Case Background

View Parent Data

Child Background (read only)

Case Background (read only)

Current Child Professionals (5)

Hearings (3)

Hours (2)

Notes (15)

Placements (6)

Education (6)

Health (3)

Documents (3)

Services (4)

Volunteer Portal Case Drill Down

Case/Child Parent Info

View parents' info.

Mother Info

Karen Porter

Address

9227 State Street

Harrisburg

XX

17110

Phone

xxx-xxx-xxxx

xxx-xxx-xxxx

Email

karen.porter@fakeemail.com

Attorney

Barb CorXXXX

Barb@Attorney.com

Father Info

Ira Steele

Address

9227 State Street


Harrisburg

XX


17110

Volunteer Portal Case Drill Down

Case Detail




Broadnax/Johnson (Pearl Harwood)
Supvr: Carmella Evans



May 28, 2013 (12 yrs)

Date of Birth



No Next Hearing

Click a heading to see details.

Child/Case Background

Current Child Professionals (5)

Hearings (3)

Hours (2)

Notes (15)

Placements (6)

Education (6)

Health (3)

Documents (3)

Services (4)

Click for more details.

Tuesday, Dec 17, 2024 @ 10:15 AM

APR (Allocation of Parental Resp) - Honorable Lin Billings-Vela

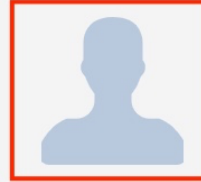
Tuesday, Jul 9, 2024 @ 1:30 PM

APR (Allocation of Parental Resp) - Honorable Lin Billings-Vela

Thursday, Jun 20, 2024 @ 8:45 AM

APR (Allocation of Parental Resp) - Honorable Lin Billings-Vela

Volunteer Portal Case Drill Down



Porter/Steele (lyonna Steele)

Supvr: Gina James



Agency Contact Info

Supervisor:

Email: gina@casamanager.com 

Agency: [555-667-9165](tel:555-667-9165)

(On mobile, press and HOLD the number to dial.)

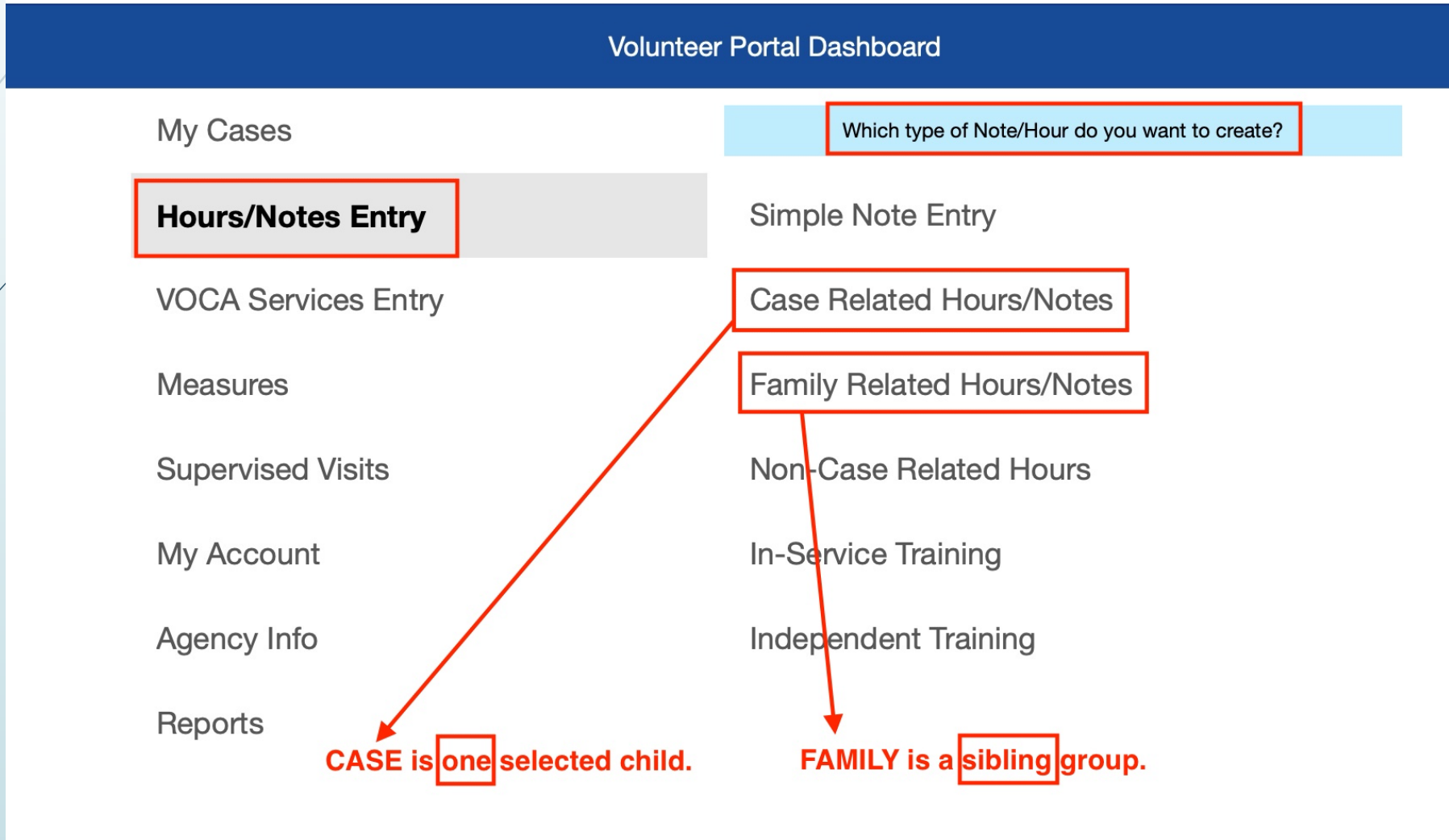
Close



MORE SCREEN SHOTS



HOURS/NOTES ENTRY



HOURS/NOTES ENTRY

You may select as many topics as you wish for one activity.

Select Topics/Activities

- | | | |
|---|---|---|
| <input type="checkbox"/> ACEs Resources | <input type="checkbox"/> Guardian | <input type="checkbox"/> Supervisor/Volunteer Contact |
| <input type="checkbox"/> CAP | <input checked="" type="checkbox"/> Hearing Note | <input type="checkbox"/> TBRI |
| <input type="checkbox"/> CASA | <input checked="" type="checkbox"/> Home Visit | <input type="checkbox"/> Teacher |
| <input checked="" type="checkbox"/> Case Update | <input type="checkbox"/> Mediation | <input checked="" type="checkbox"/> Trauma Informed Resources |
| <input type="checkbox"/> CFE | <input type="checkbox"/> Medical Update | <input type="checkbox"/> Tutoring |
| <input type="checkbox"/> Child | <input type="checkbox"/> Military Court | <input type="checkbox"/> VOCA Report Services Challenges |
| <input checked="" type="checkbox"/> Child Visit | <input type="checkbox"/> Mother | <input type="checkbox"/> Volunteer Case Update |
| <input checked="" type="checkbox"/> Collateral Contacts | <input type="checkbox"/> Mother and Father | |
| <input type="checkbox"/> College Campus Visit | <input type="checkbox"/> No Face to Face | |
| <input checked="" type="checkbox"/> Court | <input type="checkbox"/> Principal/Asst. Principal | |
| <input type="checkbox"/> Educational Rights Notes | <input type="checkbox"/> Probation | |
| <input checked="" type="checkbox"/> Face to Face | <input type="checkbox"/> Relative | |
| <input type="checkbox"/> Family Finding | <input type="checkbox"/> Safety Advocacy | |
| <input type="checkbox"/> Father | <input checked="" type="checkbox"/> School Counselor/Psychologist | |
| <input type="checkbox"/> FF/YA | <input type="checkbox"/> Staff Note | |
| <input type="checkbox"/> Foster Care Review | <input checked="" type="checkbox"/> Staffing | |
| <input checked="" type="checkbox"/> Foster Parent/s | <input type="checkbox"/> Status and Recommendations | |

VOCA Services & Measures

Volunteer Portal Dashboard

My Cases

Hours/Notes Entry

VOCA Services Entry

Measures

Supervised Visits

My Account

Agency Info

Reports

Which type of Note/Hour do you want to create?

Simple Note Entry

Case Related Hours/Notes

Family Related Hours/Notes

Non-Case Related Hours

In-Service Training

Independent Training

SUPERVISED VISITS

Volunteer Portal Dashboard

My Cases

Which type of Supervised Visit do you want to record?

Hours/Notes Entry

Child Visit Entry

VOCA Services Entry

Family Visit Entry

Measures

Supervised Visits

This is where you log your objective observations of parent-child interactions. You may enter data for one child or a sibling group who are visiting with their parents.

My Account

Agency Info

Reports

MY ACCOUNT

My Account

Name Gina James

Preferred Ph. 719-xxx-xxxx

Email Address gina@casamanager.com

Time w/Program 67.2 mos. 5.6 yrs.

Time as CASA 58.1 mos. 5 yrs.

Address XXXX Campground Road

City Anywhere

State XX

Zip 80922

Employer CasaManager

Job Title

Auto Insurance Policy Expiration Date

Notify me of new case documents





AGENCY INFO

Agency Info

DEMO County CASA

123 Main St
Bedrock, XX 99999

[555-667-9165](tel:555-667-9165)

(On mobile, press and HOLD the number to dial.)

Agency Website

Agency Calendar of Events



QUESTIONS?



A dark blue arrow points to the right, and several thin, curved lines sweep upwards from the bottom left corner.

**Thank you for all of your dedicated
efforts on behalf of the children you serve!**

CasaManager
Makes paperwork fly!