CARES
In a Nutshell:
Core Competencies I
July 27, 2017

Melanie Jannicelli

Attorney Reimbursement and Human Resources Manager

PREPARING YOUR CASES FOR BILLING: BECAUSE WE CARE!!!!

Billing with CARES

- As an OCR contractor, you will be required to use the CARES billing system.
- Once you have returned necessary payment paperwork provided with your new attorney email to the OCR, we will assign you a username and password in CARES.
- The URL is www.ocrcares.org

Procedure for new appointments

- All new appointments must be entered into CARES within 48 hours of notification of the appointment.
- For DR/PAT and Probate cases, you must review the order of appointment and indigence findings to determine if the parties qualify for state pay. Only state paid cases can be entered into CARES.
  - Pre-Decree: OCR will only pay if both parties are found indigent. We will not pay 50% on pre-decree matters.
  - Post-Decree: OCR will pay if one or both parties is found indigent. We can also pay other percentages such as 33% if so ordered by the Judge.
  - APR, PAT and Probate: In matters of parental responsibilities for DR cases, as well as in probate and paternity cases, OCR will pay if one or both parties is indigent.

Important Billing Notes
DR/PAT & Probate

- OCR does not pay nunc pro tunc orders. If orders are received late and work has already been completed that is outside the 30 day billing cycle, the attorney will not be paid on these activities.
- You will not paid on any activity entered into the system with dates of service before the date OCR receives your order with indigence findings.
- Always enter all of your time into CARES; if you cut your time manually (i.e. on a 50% paid case), the system will cut your time again. OCR will not reimburse you for the time lost.

Next Steps

- You must enter your case into the CARES system before doing anything else.
- You will receive an automatic presumptive billing maximum based on case type.
- If the case is DR/PAT or probate, fax or email your signed order to OCR's Billing Manager.
- OCR will review the order and will enter a billing allocation into CARES.
- At this point you are ready to enter activity into CARES for payment

Entering Activity

- Users enter all case activity via a case profile screen.
- Billing is automatically pulled by OCR on a weekly basis.
- All billing must be entered within 30 days of the date of activity to receive payment.

Excess Fees

- All cases have a presumptive maximum applied to the case at the onset of your appointment.
- Office Billing Details Screen
  - When you have reached 70% billed of your maximum limit, your case will turn yellow. When you have billed over your maximum, the case will turn red.
    - When the case is red, you will no longer be paid until you request and receive excess fees.
- You must request excess fees prior to doing the work through the online form located at: http://www.coloradochildrep.org/attorney-center/billing/
- Upon approving fees, OCR will enter a new dollar amount allocation into CARES.

Summary

Office	Total Amount Billed	Total Amount Submitted	Total Amount Disputed	Total Amount Unpaid	Total Amount Paid
OCR	$548.26	$225.00	($39.00)	$323.26	$186.00
Total	***$548.26***	***$225.00***	***($39.00)***	***$323.26***	***$186.00***

Allocations

Office	Amount	End Date	Previous Dollars	Percentage of Billing Rate	Non-Billable	Note	
OCR	$5,000.00			100%			

Office Billing Details

Office OCR

Status All

Case Number	Case Type	Allocation	Total Amount Billed	Total Amount Submitted	End Date	Previous Dollars	Note	Percentage of Billing Rate	Non-Billable	
06JV700	D&N - Non EPP		$184.18	$0.00				100%		
10JV4000	D&N - EPP	$180.00	$419.09	$150.10				100%		
12JD2222	Delinquency	$1,500.00	$116.00	$0.00				100%		
12JV004	Truancy	$500.00	$0.00	$0.00				100%		
12JV035	Truancy	$500.00	$0.00	$0.00				100%		
12JV45678	D&N - Non EPP	$4,000.00	$240.46	$0.00				100%		
14CA1020	Appeal	$2,500.00	$0.00	$0.00				100%		
14JD5555	Delinquency	$2,000.00	$0.00	$0.00				100%		
14JV111111	D&N - EPP	$4,000.00	$363.64	$225.00				50%		
14jv12345	D&N - EPP	$5,000.00	$0.00	$0.00				100%		

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Additional Costs

- The OCR pays our contractors for:
  - CBI's
  - copies
  - discovery
  - filing fees
  - postage
- All of these items are billable through the CARES system in the miscellaneous expenses category.

Travel and Related Expenses

- If you wish to travel, per the OCR's travel policies, you *must* request pre-approval using the "Travel Expense Form".
  - The attorney's failure to seek and obtain required OCR approval will result in the OCR refusing to reimburse the attorney for travel time and associated expenses unless the OCR determines that the Attorney's failure to seek pre-approval was due to extenuating circumstances and allows an exception.
- Approved travel & related expenses (meals, hotels, etc) need to be billed using the "Pre-approved Travel and Expense Billing form".
- Include all applicable receipts with the form.
- Mail/Email/Fax form to OCR for payment.
- Payments from these forms will be direct deposited into your account just like ordinary billing.
- These forms can be found on the OCR website at: http://www.coloradochildrep.org/attorney-center/billing/

Staying On-Top of your Billing

- It is important to regularly check the Office Billing Details screen in CARES to make sure you are up to date on billings and orders.
- If your case is yellow, you are close to reaching the fee limit and need to request excess fees if necessary.
- If your case is red, either you have exceeded your excess fee limit, you have not submitted your order, or you entered your case after submitting your order and did not notify Melanie.
  - In all three of these scenarios, you are NOT being paid!

If you have items that are not being paid….

- Look at the Case Billing History Screen:
  - Check the end date or dollar amount – have you exceeded the dollar amount or date? If the answer is yes, you need excess fees and we will not pay you any more on the case until you request and are granted those fees.
  - Check the activities that are in question:
    - Did you enter them within the 30 day billing rule? If not, then that could be a reason you are not getting paid.
    - Did you enter a duration? Some people enter 0. If you enter 0 you will not be paid because you are asking to be paid 0 dollars.
    - Are the activities in question disputed? If so, you need to address that with me before they can be paid.
- IF you have checked both of these screens and are still unsure….
- Check of Office Billing Details Screen:
  - Is your case yellow or red??
    - If the case is red, you are over your excess fee limit and must request fees.
    - If the case is yellow, it could be so close to red that we cannot pay the remaining items until you request fees.
- IF you have checked all of the above screens and you believe the following is true:
  - You are not over your fees
  - You entered your time within the 30 days
  - The items are not disputed…..
- Promptly email Melanie and she will look into the issue for you.

Office Billing History Screen

- This screen allows you to sort by payment status, and date range to see what items have and have not been paid.

Office Billing History

Office OCR
Status Unpaid
Begin Date 6/13/2015 End Date 6/30/2015 Ok

Total Amount Billed	$0.00
Total Amount Disputed	$0.00
Total Amount Paid	$0.00
Total Amount Unpaid	$0.00

User Totals

Billing User	Total Amount Billed	Total Amount Submitted	Total Amount Paid
Melanie Jannicelli	$0.00	$0.00	$0.00

Dispute	Activity Date	Date Entered	Activity Type	Case Number	Duration	Billing Type	Billing User	Billing Rate	Amount Billed	Amount Paid	Submission	Status
	6/30/2015	6/30/2015 3:26:17 PM	Review Document - Documents	14JV111111	6	Administration	Melanie Jannicelli	$0.00	$0.00	$0.00		
	6/30/2015	6/30/2015 2:53:58 PM	Phone - Child	14JV111111	36	Administration	Melanie Jannicelli	$0.00	$0.00	$0.00		

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Closing your Cases in CARES

There are three steps you MUST follow in order to properly close out a case in the CARES system

1. Close the case using the "close case" button at the top of the case profile screen. Make sure to use the date the case closed with the court, not the date you actually made the entry in CARES.
2. End your appointment(s) to the case using the "edit/pencil" button under the appointments section of the case profile screen. Be sure to include an end date and reason.
3. Delete your assignment from the assignments section of the case profile screen using the red "x" button.

If you do not do all three of these steps, the case will remain on your office billing details screen and will be included in all case count reports ran on your office.

Helpful Reports

- Child Present at Hearing
- Inactive Cases
- Hours Billed Per Day
- Visit CJD Initial Visit
- Activity during Timeframe

Hours Billed per Day

Visit CJD Initial Visit

Questions and Concerns

Please direct all questions and concerns regarding CARES to Melanie Jannicelli at melaniejannicelli@coloradochildrep.org or

303-860-1517 x 100.