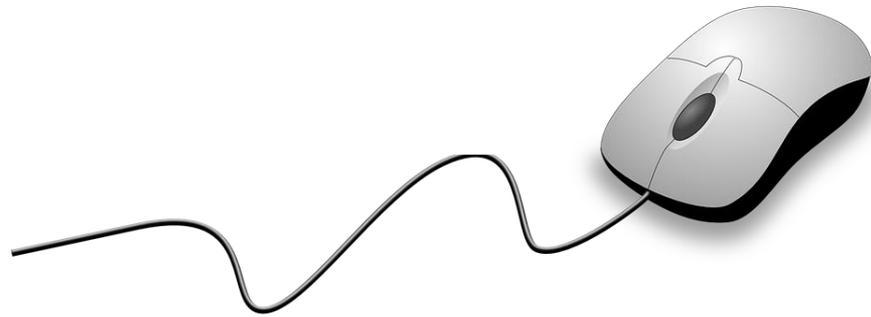


First Look at the New CARES Application

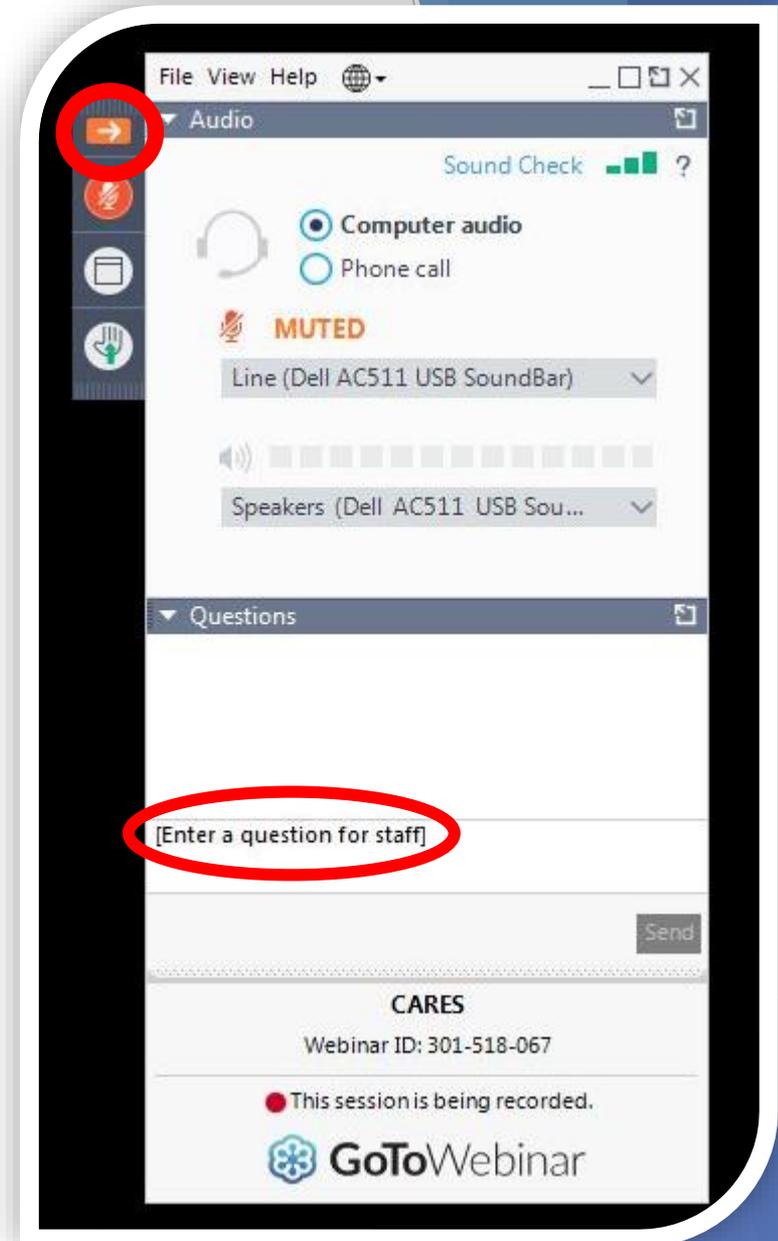


CARES Billing and Case Management System Upgrade
Office of the Child's Representative | March 22, 2018

How to Ask Questions During the Webinar

- ▶ Type your question into the “Enter a question for staff” box in the Go To Webinar Control Panel on your screen.
- ▶ Click the “Send” button. OCR will see your question during the live presentation.

If you do not see the box pictured at right, your control panel may be minimized. Look for and click the orange arrow icon  to expand the panel and find the Questions area.



A Little History

- ▶ In FY 2012, the OCR obtained our current case management and billing system, Colorado Attorney Reimbursement Electronic System (CARES).
- ▶ The current system has undergone several modifications to try to optimize it for practicing attorneys and for the OCR.
- ▶ OCR attorney users have indicated that the system is overly time-consuming and not user-friendly, and that slowness and down-time impedes their ability to efficiently enter billing and case management information.
- ▶ Mark, Melanie, and Rebecca at OCR have been working with a software company to develop the new application.
- ▶ A group of volunteer OCR attorneys and their staff provided invaluable testing and input for the OCR team.
- ▶ **The new, upgraded system goes live April 2nd, 2018! This presentation will give you a first look at the application and answer some common questions about the transition.**

OCR's Goals

- ▶ **Streamlined Design:** The updated technology is more modern, stable, and user-friendly to save you time.
- ▶ **More Case Management:** The system allows you to record data about each child including ICWA, court attendance preference, IEP, and more.
- ▶ **Searchability:** Search technology is built into most pages, allowing you to find attachments and other case information with greater ease.
- ▶ **CJD Categories:** Case activities are grouped by Chief Justice Directive (CJD) requirements to facilitate case management and compliance with OCR/CJD requirements.
 - ▶ Please find the current list of activities for your reference in the “Materials” of this webinar.

New CARES Dashboard



Colorado Office of the
Child's Representative

Home

Cases

My Contacts

Invoicing

Additional Funds

Reports

User Settings

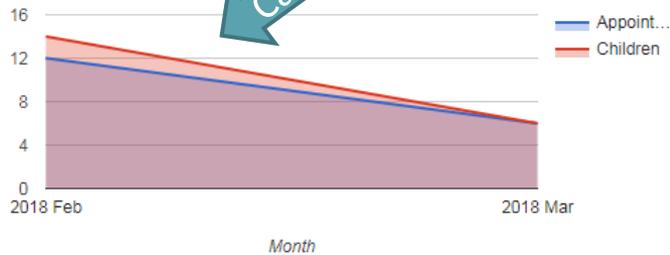
Help

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Home

Home page and main dashboard of the CARES app.

Appointments



Invoices



Alerts

16JV36: CHECK MAXIMUM BILLING ALLOCATION.

FUNDS REQUEST APPROVED: 17JV123

Page: 1 1-2

Current Caseload

Total Cases: 6
Total Appointments: 6
Total Children: 5

ENTER ACTIVITIES

System Preview: Appointment, Child, & Activity



Appointment: 16JV456

Status: Open



SAVE SAVE AND EXIT

- PROFILE**
- ACTIVITIES
- FINANCIAL PROFILE
- ADDITIONAL USERS
- INVOLVED PERSONS
- NOTES
- ATTACHMENTS

Full Unique Case Number	Abbrev. Case Number	Judicial District	County	Case Type
D0402016JV000456	16JV456	12th Judicial District	Mineral	D&N - Non-EPP

Appointment Nickname	Attorney Name *	Office Name	Appointment Capacity *
	Tyson, Neil deGrasse	▼ Quantum Law Firm	GAL for Child ▼

Appointment Billing Allocation	Case Billing Percent *	Effective Date *
\$5,000.00	100%	2/4/2018

ADD CHILD PARTY

Child Party Name	Date of Birth	Age	Current Placement	Days in Placement	Permanency Goal	Appt. Start Date
GARFIELD, JAMES ABRAM	09/24/2003	14	AUNT JANE	15	APR to Non-Relative	02/04/2018



Other Features Include:

- ▶ **Case Search:** Search across all OCR cases by JD, county, year, case type, child name, attorney number, or office.
- ▶ **Contacts:** Store contact information for individuals you contact frequently. These can be linked to specific cases as needed.
- ▶ **Attachments:** Attach documents to specific activities or to your whole case. Search for case attachments by document name or key words.
- ▶ **Warnings and Prompts:** The system will provide helpful reminders. For instance, it will prevent you from creating a duplicate case. You will receive email notifications when the status of your invoice changes. When you add an end date to the children on the case, the system will ask if the case is closed.
- ▶ **Help:** Click on a Help Menu to search for help articles within CARES.
- ▶ **Excess Fees and Invoicing: Detailed next!**

Excess Fees/Billing Allocation

- ▶ Excess Fees Requests are integrated into the new CARES system (will be called “Request Additional Funds”).
- ▶ When you are nearing or exceeding the billing allocation on a particular case, you’ll see warnings on the Home screen and on the case profile; you can complete a “Request Additional Funding” form directly in CARES.
- ▶ When using the CARES form to make a request, you will:
 - ▶ Enter the dollar amount requested.
 - ▶ Describe how the legal work you anticipate is reasonably necessary to provide competent and effective best interests legal services in a cost-effective manner and representation within the scope of your appointment.
 - ▶ Certify that the request is correct and necessary.
- ▶ Other Tools Available:
 - ▶ Filter cases for those “Nearing Maximum Billing Allocation.”
 - ▶ Adjust how early you see warnings on specific cases (e.g. on a certain case, opt to be warned when 50% of your allocation is gone instead of the default setting of 80%).



Preview: Request Additional Funds (Excess Fees)

Appointment: 16JV36

Status: Open



 Check maximum billing allocation.

SAVE

SAVE AND EXIT

- PROFILE
- ACTIVITIES
- FINANCIAL PROFILE**
- ADDITIONAL USERS
- INVOLVED PERSONS
- NOTES
- ATTACHMENTS

Appointment Billing Allocation	\$5,100.00	
Total of activities entered but not yet invoiced	\$3,700.00	
Total amount invoiced but not yet paid	\$1,240.00	
Total Paid	\$0.00	
Remaining Available Funding	\$160.00	

[REQUEST ADDITIONAL FUNDING](#)

How Will OCR Process Requests?

- ▶ Requests are approved if OCR determines the description of the legal work you anticipate is reasonably necessary to provide competent and effective best interests legal services in a cost-effective manner and representation within the scope of your appointment.
- ▶ If your request is rejected, you can review OCR's reason and submit another request if needed.
- ▶ You will see a notification on the Home screen when your request was approved or rejected.
- ▶ OCR may approve the entire amount requested, or a different amount.
- ▶ Your case will automatically show the new allocation (no reconciling between request outcomes and the CARES application).

Invoicing

- ▶ The new CARES system is no longer based on billing within 30 days of the date of the activity.
- ▶ Instead, you will have improved billing and accounting functionality in the form of invoicing, allowing a more conventional approach to attorney billing.
- ▶ You will enter activities as frequently as you choose. Those activities will automatically appear on a monthly invoice the managing attorney will call up, review and submit.
 - ▶ Solo practitioners are considered “Managing Attorneys.”
- ▶ The invoice features detailed totals by case or by day and enables you to review your billing and correct any errors.

Preview: Generate an Invoice

(invoice contents shown on next slide)



emusk
Log out



Colorado Office of the
Child's Representative

Home

Cases

My Cases

Search Cases

My Contacts

Invoicing

Additional Funds

Reports

User Settings

Help

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Cases/My Cases

View the list of appointments assigned to me.



Start Date From



Start Date To

Abbr. Case Number

Child Party First Name

Child Party Last Name



Open



Closed



Appointed to Me



Nearing Maximum Billing
Allocation



Matching Appointments

Case Number	Case Nickname	Case Type	Court	Child Parties	Appointed Attorney	Start Date	End Date
14JV123	TJ	D&N - Non-EPP	15 - Cheyenne	Jefferson, Thomas	Tyson, Neil deGrasse	02/01/2018	
16JV36		D&N - EPP	11 - Custer	Fillmore, Millard	Musk, Elon	02/01/2018	
16JV456		D&N - Non-EPP	12 - Mineral	Garfield, James Abram	Tyson, Neil deGrasse	02/04/2018	
17JD123		Juvenile Delinquency (JD)	5 - Eagle	Jefferson, Thomas	Tyson, Neil deGrasse	02/13/2018	
17JV123	NTyson Test	D&N - Specialized Court	11 - Chaffee	Cleveland, Grover	Tyson, Neil deGrasse	01/15/2018	
18JD1013		Juvenile Delinquency (JD)	11 - Fremont	Monroe, James	Musk, Elon	01/01/2018	

Page: 1

Rows per page: 20

1 - 6 of 6



Sample Invoice Contents

Court	Case Type	Case	Activity Date	User	Activity Date	Parties	Duration (Hours)	Duration (Amount)	Quantity	Expense	Credit	Total
1 - Jefferson							42.50	\$3,075.00	335	\$158.76	\$0.00	\$3,233.76
		D&N - EPP					42.50	\$3,075.00	335	\$158.76	\$0.00	\$3,233.76
		18JV9999					42.50	\$3,075.00	335	\$158.76	\$0.00	\$3,233.76
			02/15/2018	Smith, John	Court	Simpson, Bart	1.10	\$82.50	18	\$8.33		\$90.83
					Duration		0.50	\$37.50		\$0.00		\$90.83
					Travel Time		0.60	\$45.00		\$0.00		\$90.83
					Wait Time		0.00	\$0.00		\$0.00		\$90.83
					Mileage			\$0.00	17	\$8.33		\$90.83
			02/16/2018	Smith, John	Document Review		10.60	\$795.00	1	\$0.00		\$795.00
					Duration		1.60	\$120.00		\$0.00		\$795.00
					Travel Time		9.00	\$675.00		\$0.00		\$795.00
					Mileage			\$0.00	0	\$0.00		\$795.00
			02/19/2018	Smith, John	Communication with Child	Simpson, Bart	0.20	\$15.00	1	\$0.00		\$15.00
					Duration		0.20	\$15.00		\$0.00		\$15.00
			02/21/2018	Smith, John	Visit: Initial (Home/Placement)	Simpson, Bart	5.40	\$405.00	261	\$127.40		\$532.40
					Duration		0.90	\$67.50		\$0.00		\$532.40
					Travel Time		4.50	\$337.50		\$0.00		\$532.40

▶ Blue circles let you drill-down for more detail

▶ Yellow icons show you 10+ hour days

▶ Click a case number to jump to that case

▶ Toggle to a “Date View” to view totals by day

How Will OCR Process Invoices?

- ▶ By the 15th day of each month, the Managing Attorney must submit an invoice to the OCR. The Managing Attorney certifies that all billing is true and correct.
 - ▶ Solo practitioners are considered “Managing Attorneys.”
- ▶ The OCR Billing Manager reviews invoices in the order in which they are submitted. Things the Billing Manager may look for include:
 - ▶ Individual days that exceed 12 hours of billable time.
 - ▶ Significant variance(s) in dollar amounts, hours, etc. from prior invoices.
 - ▶ Significant activities on a single day/case/appointment.
- ▶ After review, the OCR Billing Manager may approve or reject the invoice. You will get an email notification.
- ▶ **All undisputed invoices will be paid within 45 days of receipt. OCR will endeavor to pay undisputed invoices within 30 days of receipt.**

What happens if rejected?

- ▶ *If* the OCR Billing Manager discovers errors or has questions regarding an invoice, s/he rejects the invoice in CARES, with notes for you about why.
- ▶ The Managing Attorney will review the Billing Manager comments, makes any changes if necessary, and generate/submit a new invoice.
- ▶ The Billing Manager verifies/reconciles any differences between the rejected invoice and the new invoice, and approves the invoice in CARES if there are no further questions/errors.

Monthly Payments

You will be paid once per month instead of weekly. The change from weekly payments to one monthly payment requires some advance planning on your part. You can enter activity in the new system as frequently as you wish, but you will only submit an invoice to OCR once per month.

Though this means less frequent payments, invoicing provides many benefits:

- ✓ *Allows you to review your activities in a detailed report*
- ✓ *Allows you to reconcile and predict payments*
- ✓ *Reduces payment delays*



How will the transition work?

- ▶ You will have access to current CARES for all of April to enter data and billing, but you should *only* do so for activities that took place *before* April 1st. Those will be the last items paid via the old system and its schedule.
 - ▶ March activities will *only* be paid via the old system. OCR will only pay new system invoices ranging from 4/1/18 on.
- ▶ **Enter data and billing about new activity that occurs *April 1st, 2018 or later* into the new system.**
 - ▶ If you enter April activities into the *old* system, they will not be paid.
- ▶ For the foreseeable future, you will have access to current CARES to view historical information and reports (there's no deadline on *viewing* current CARES).
- ▶ Any changes you make in the old system after May 1st, 2018 will not be saved, even if they appear to save. **After May 1st, you will only be able to change and save data in the *new* system.**

Reimbursement for Data Migration



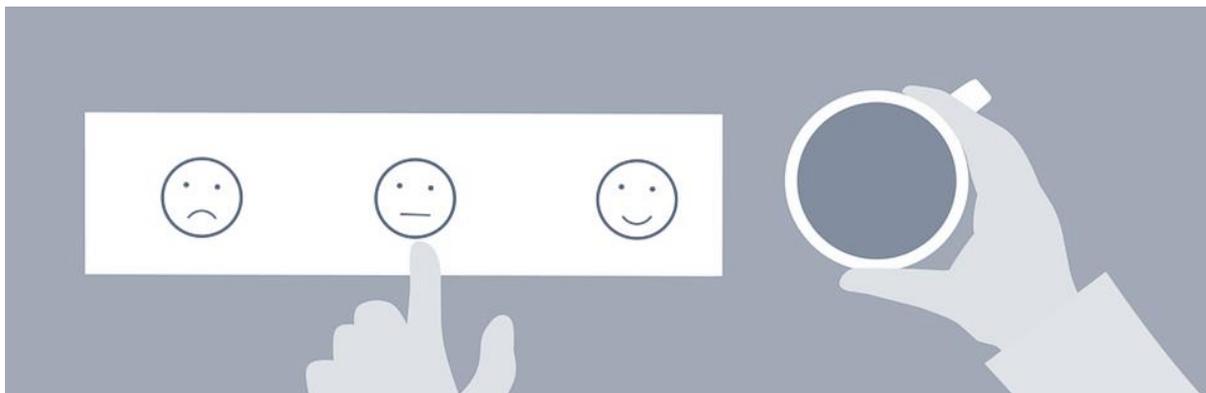
- ▶ We will pay your office **\$7.50 per case** to enter your existing cases from the old system into the new application from April 2nd to May 15th.
- ▶ Submit a reimbursement form for this data entry by May 15th, 2018. To receive reimbursement, you must complete all the form's requirements including:
 - ▶ List each of the case numbers of your cases transferred into the new system.
 - ▶ Provide the total number of cases you entered—we will multiply that by \$7.50 to calculate your reimbursement.
- ▶ Find the PDF “Data Entry Reimbursement Form” in the “Materials” of this webinar.
- ▶ We will also send the PDF reimbursement form with reminders via email.

Important Dates

- ▶ **Midday on Monday, April 2nd, OCR will send via email:**
 - ▶ The link to the new application and your username and password.
 - ▶ A script to walk you through the system as you get started (a written tour of the whole system).
 - ▶ Updated Billing Policies and Procedures
- ▶ **By April 30th:** All your time for work done through March 31st must be in the old system for final payments.
- ▶ **By May 15th:** Submit your reimbursement form for entering your existing cases into the new system between April 2nd and May 15th (previous slide).
- ▶ **By May 15th:** Your invoice for April activities recorded in the new system may be submitted any time between May 1st and May 15th.

What to Expect

- ▶ We know this is a big change. *OCR is here to support you—reach out to us, don't harbor frustration!*
- ▶ The new application is in great shape, but we fully expect you to find some glitches. In fact, we count on you to identify snags as part of a successful rollout. So please tell us if you see a glitch so our team can get to work fixing it.
- ▶ More improvements are already in the works: After April 2nd, our team will focus on building reports and a set of enhancements. **We will continue to want your great ideas for enhancements going forward!**



Questions?

- ▶ Type your question into the “Enter a question for staff” box in the Go To Webinar Control Panel on your screen.
- ▶ Click the “Send” button. OCR will see your question during the live presentation.

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