

OCR CARES Billing and Case Management CARES Handbook

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The Office of the Child's Representative (OCR) billing and case management system, CARES (Colorado Attorney Reimbursement Electronic System), is a secure online application which allows contract attorneys, paralegals, social services professionals, and support staff to record all case-related activity. All attorney contractors are required to enter work performed on OCR cases into the OCR CARES system in order to invoice OCR for those activities and receive payment.

The purpose of this document is to provide a practical "how to" orientation to CARES and a handbook for future reference. This document *does not* detail OCR's billing or other rules and policies; please be sure to consult OCR's *Billing and Payment Manual* and other essential resources—including future updates to this document—posted at <http://www.coloradochildrep.org/attorney-center/billing/>. You can click on blue underlined hyperlinks throughout this document to access associated online resources.

How to Access CARES

To obtain your CARES username and password for the first time, complete Steps 1-8 below. This one-time setup takes five to ten minutes to complete. OCR's recommended web browser for CARES is Google Chrome. Firefox and Safari are also supported. **CARES does not perform well in Internet Explorer or Microsoft Edge.** You can download Chrome for free at <https://www.google.com/chrome/>.

1. Go to <https://cares.coloradochildrep.org/#!/forgot>. (Click on the link OR copy/paste this URL into your web browser's [address bar](#).)
2. Once at the link from Step 1, carefully type your email address at which you received this document and click Submit. *Important:* You must use the address at which you received *this document via email from OCR*—this is the email address OCR has registered with your CARES account.
 - If you see a message that your address is "not in our records," double-check that you did not include any typos or extra spaces in Step 2 and confirm that you are using the email address at which you received this document from OCR.
 - OCR can change your email address for CARES if needed. See *User Settings: Contact and Billing Information in CARES*.
3. You will receive an automated email within a few minutes (usually after at least 3 minutes). Note your **CARES User Name** at the beginning of that automated email.
 - If you do not receive an email, please wait at least 5 minutes and repeat Step 2 at least once. If that doesn't work, check your spam and junk folders. If you cannot find the email within 30 minutes, write to rebeccagarrison@coloradochildrep.org for help.
4. Go to the hyperlink in the email from Step 3. Enter *any password you would like* for the CARES application. Your password is *not* linked to any other system—you can make it up. Click the blue "Reset Password" button to save it. You will be able to change it as needed in the future.
 - The link from Step 3's email will expire after 30 minutes—start over for a fresh link if needed.
5. Click the blue "Log In" button.
6. Enter your User Name (it was at the beginning of the email from Step 3).
7. Carefully enter the Password you made up in Step 4.
8. Click the blue "Log In" button.

Welcome to CARES! After completing the steps above once, you can log in to CARES as frequently as needed by entering your user name and password at cares.coloradochildrep.org.

For CARES to perform best, please make a habit of completely quitting your [web browser](#) application (Chrome, Firefox, Safari, etc.) daily. This may require more than just closing the window, especially on a Mac. This is good advice for many online activities. It is also a good habit to restart each device (computer, phone, etc.) once a week. To avoid data loss, **please do not work on CARES in more than one web browser tab or window at the same time.**

Home, Main Navigation, Contacts, and Settings

Home Screen

Upon logging in to CARES, you will see the Home Screen. After you have active appointments and invoices, this screen will show case and child counts, various alerts, and charts of your caseload and invoicing. The charts show monthly points in time, so they will look blank until next month. You can return to this screen as needed by clicking "Home" on the left-side navigation menu.

Left-Side Navigation Menu

You will always have access to the left-side navigation menu in CARES. It either is open and displayed on the left *OR* collapsed into an icon with three white bars. Click on that icon to open the menu if needed. Click on the words in the menu to navigate to those areas.

Zoom In or Out

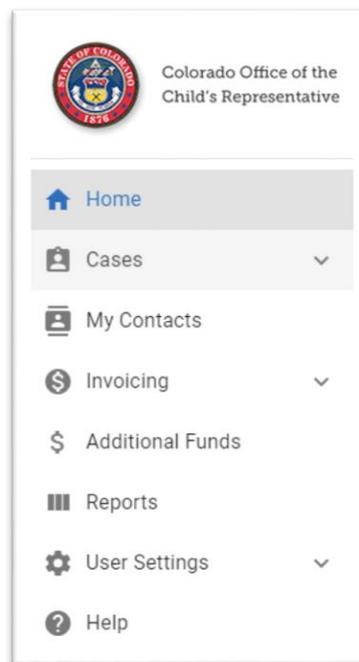
On standard web browsers (Chrome, Firefox, Safari, etc.), you can zoom in and out to change the font size and display. In CARES, if you are zoomed in, the left-side menu will collapse (see above); if you are zoomed out, it will show. You may want to experiment with zooming to adjust your CARES screen display—see <https://www.wikihow.com/Zoom-With-a-Web-Browser> for browser-specific instructions. Please note, zooming is not a CARES setting; it depends entirely on your individual web browser's settings.

Cases > Search Cases

On the main left-side navigation menu, Cases > Search Cases gives you limited access to all cases in CARES. Click the blue "Search Cases" button to display a list of all cases (e.g. if you need to know who is appointed on a case). Notice you can refine your search by Attorney Bar Number, Office, Child Name, and more. Click the blue "Search Cases" button again after you add criteria to refine the list. You can click "Reset" to remove your search criteria. After finding a case, click on a blue case number to go to the details of that case, including "Appointments" at the bottom (attorneys appointed to this case). If your office is appointed, you can click the blue appointed attorney's name to access more details.



▲ *Left-side navigation menu icon: Click once on the three stripes to open the navigation menu if it is not already displayed*



▲ *CARES left-side navigation menu*

Cases > My Cases

After completing the *How to Set Up a Case* section below, you will be able to click on Cases > My Cases to find the cases you are appointed to (as opposed to all the cases in CARES in "Search Cases"). There are also search options above your My Cases list; click the blue magnifying glass after you add criteria to refine the list. Click on a blue case number to go to the details of that appointment.

- If you are an "Additional User" on any cases, those cases will also be listed here (see *Features of Each Appointment: Additional Users Tab*).
- Attorneys managing other attorneys will see all their office's appointments here.
- If either of the notes above applies, you can select the "Appointed to Me" checkbox and click the blue magnifying glass to filter the list so it shows only cases *appointed to you*.

My Contacts

On the main left-side navigation menu, the My Contacts screen offers a private area to store individuals' contact information. The individuals you save in My Contacts can be linked to multiple appointments (e.g. a therapist you work with on many cases)—see *Features of Each Appointment: Involved Persons Tab*. Click the blue "Add Contact" button to add a new contact here. You can check a box to mark a "Favorite" and later filter your My Contacts list for "Favorites" for easy access to your most-contacted individuals. After creating a Contact, be sure to click "Save." On the My Contacts screen, check the checkbox beside an existing individual to edit or delete him/her.

User Settings

Click on User Settings near the bottom of the left-side menu. Then, click on any of the following options detailed next.

General Settings

This feature is currently only for Managing Attorneys (note, solo practitioners are considered "Managing Attorneys"). Check or uncheck the checkbox beside "Invoice Update Emails" to turn email notifications of invoice status changes on or off. Click "Save" to save your changes.

Change Password

This screen allows you to change your password at any time. OCR recommends changing your password once every three months. Note that you must enter your current password, then enter your new password twice (for confirmation), then click Change Password. A Weak/Strong bar will change from red to green depending on the complexity of the password you enter—aim for a "Strong" password by avoiding full words, using special characters, and increasing your password length.

My Office

This screen shows all the CARES users in your office, whether they're "active" (i.e. able to log in), and each "Persona" (i.e. user type, like Paralegal). Use this screen to confirm that all your office's CARES users are up to date. [Contact OCR](#) if you need to change names, personas, or deactivate users. If you are a Managing Attorney (or solo practitioner) and need to add support staff, do so via the authorization form at <https://fs30.formsite.com/COCR/AddToCARES/index.html>.

[What Happens if I Click "Cancel" or "X"?](#)

Clicking either a "Cancel" button or an "X" in the corner of a window in CARES will close the current window without saving changes. Look for a "Save" button instead if you want to save your changes.

Personas and Permissions

Not all user types or "personas"—e.g. Case-Carrying Attorney, Paralegal, or Social Services Professional (SSP)—have the same permissions within CARES. Managing Attorneys have access to all features described in this guide. Case-carrying attorneys and paralegals have all features except invoicing. SSPs can add activities and view almost everything in the office, but they cannot edit or create some items such as cases or appointments.

Contact and Billing Information in CARES

If you need to update your email address for invoice notifications, billing information (bank account, etc.), or anything else not available in User Settings, please complete a Change of Status Request form at <http://www.coloradochildrep.org/attorney-center/change-of-status-request/>.

Data Entry Fundamentals

- **CASE:** A *case* is sometimes shared in CARES—more than one office can be “appointed” to each case in the system.
- **APPOINTMENT:** Your *appointment to a case* is exclusive to you/your office.
- **CHILD PARTIES:** Your exclusive *appointment* may contain multiple *child parties*.



- If you see a **spinning blue circle or progress bar**, you should wait for it to stop so the current page and its menus will work properly.
- **Red asterisks denote required information.** The system will prevent you from saving a page or pop-up window unless you have entered data everywhere you see an asterisk.
- You may need to **scroll up or down** to see all of a page's or menu's contents and requirements.
- **If you don't know what to do next, look for a blue button**—blue buttons suggest logical next steps.
- **Make sure to save if you get called away from your computer.** For security, if you are inactive for 30 minutes, CARES will automatically log you out, meaning you will lose any unsaved appointments, activities, notes, etc. *Do not leave or close your device without saving.*

How to Set Up a Case

You can only enter activities and bill after you complete Steps 1 - 5 detailed below to set up your appointments(s) to case(s). Creating and saving an appointment will make all billing and case management functions available. The main steps are: 1) Search, 2) Identify Your Case, 3) Appoint to Case, 4) Add Child(ren), and 5) Save.



1. **SEARCH ALL CASES:** Click on **Cases > Search Cases** (near top of left-side menu). At the top, enter your case's **Judicial District, Court/County, 4-digit case year, Case Type, and/or Case Sequence**. The end of the case number is the sequence (e.g. 12JV1234 – 1234 is the "sequence").

2. **IDENTIFY YOUR CASE:** Click on the **blue "Search Cases"** button. (Note, no cases will ever show in the search until you click this button.)

a. ***If your case DOES appear*** under "Matching Cases," click on its blue case number. Double-check the displayed "Date Opened By Court." If needed, correct the date and click the blue Save button. Proceed to Step 3.

- OR -

b. ***If your case DOES NOT appear*** under "Matching Cases," click on the **"Create Case" button** (midway down on the right). Your search criteria will automatically transfer into the Create Case form. Enter all required (asterisked) info, including **Date Opened By Court**—this is the date the *court* opened the case (*not* the date you opened the case in CARES). Click the **blue "Save" button** to save this new case. The case is now available in Cases > Search Cases, but it is not yet in Cases > My Cases because you have yet to create an appointment. Proceed to Step 3.

If you see a warning that your case already exists, start over at Step 1 to find the existing case. Make sure to search open and closed cases. Note the other case search tips in the sidebar at right.

No one will be able to create an appointment or enter work before the case's "Date Opened By Court," so the instructions above help you make sure it is accurate now to prevent later annoyances.

3. **APPOINT TO CASE:** Click the **blue "Create Appointment" button** (near the top right of the screen). You should only do this one time

Case Search Tips:

If you select a county first, the system will fill in the judicial district for you.

You can usually find a case quickly by entering just one or two of the possible search criteria (e.g. sequence, year), then refining the results with other criteria only if needed.

Entering Dates:

*When you click on a date field, a calendar will open. Within the calendar, **scroll up with your mouse wheel or touch pad to go back in time.** You can also use the keyboard arrows to move between dates in the calendar. Click on any month inside the calendar to show more months for faster scrolling, then click on the month you need and select a date.*

If you prefer to type the date, click on the date field a second time—the calendar will be replaced by your cursor. If you are tabbing into a date field, tab once to see the calendar or tab twice to type.

per case, regardless of how many children are on the case. As illustrated in the diagram in *Data Entry Fundamentals*, you appoint yourself *once* to the case and later add one *or more* children to that single appointment (that will be Step 4). Do not create an appointment for each sibling on the same case.

- a. Choose an **Attorney Name** to appoint an attorney from your office to this case.
- b. Choose an **Appointment Capacity**.
- c. Optionally, enter an **Appointment Nickname** (optional and only for your office's convenience; nicknames will show on your "My Cases" list).

4. ADD CHILD(REN): Next, you must add at least one child party as follows. **Repeat a, b, and c below for each child party.**

- a. **Click the "Add Child Party" button** toward the bottom-right of the screen. At the top of the form that pops up, search among existing children by entering a *full* first *OR* last name. Try not to add a duplicate child if you can find the child already in CARES by searching here.
 - i. **If you find the child by searching**, click the checkbox beside him/her, then "Add Selected Party." (Never select an existing child and then fundamentally alter the name or DOB—this could corrupt other attorneys' data. If you don't find a good match, skip to "ii" below.)
- OR -
 - ii. **If you cannot find the child by searching**, click the "Create Child Party" button at the bottom.
- b. **Complete the pop-up screen** that asks for data about this child:
 - i. The "Shared" portion at the top of the Child Party form is visible to and editable by anyone who views this child. The "Private" portion is exclusive to your office's appointment.
 - ii. A **"Start Date" is required**—this is the date of your appointment to this child. (If you cannot go back in time as far as needed, the *case* open date may be inaccurate—repeat Steps 1 through 2a to correct it.)
 - iii. Scroll down to view all the **optional case management fields** for this child. You may or may not have this information yet; you can update this later as needed.
 - iv. Scroll to the bottom for the last required data: **add at least one placement by clicking "Add Placement."** Choose a placement type and, if prompted, indicate whether the placement is out-of-home. Enter the best information you have at this time—e.g. you may only have a description and no address at first. Or, if you are choosing from existing placements, type a *full* word in the "Search placements" table.

Avoid Case Number Errors!

CARES locks case information after creation, meaning that the year, JD, court/county, and case sequence cannot be edited later. **Always double-check the accuracy of the case number before creating your appointment!**

You can edit the Case Open date as needed by following Steps 1 through 2a.

If you are appointed to the wrong case: If you have entered any activity, delete it to prevent inaccurate billing. Then open each child party and enter an end date with reason "Opened in error." Click "Confirm" on the notification that the appointment is now closed. CARES may ask if the case itself is closed (say "No" unless you know otherwise). Finally, start over with "How to Set Up a Case."

SA or M Case Type:

To bill for a writ to the Supreme Court (SA) or an "M" case type, please bill outside of CARES using the Non-CARES Case Billing Form.

Check the box beside the correct placement. Make sure to enter a **start date** for the child in that placement (you only need to record back as far as the start of your appointment), then click "**Save.**" You can return to and edit this information later by selecting the checkbox next to the placement and clicking "Edit Placement."

- c. Click "**Add Child Party**" at the bottom-right to save this child to your appointment. To add additional children, **repeat Step 4 for each child** (Add Child Party, identify a child, add a placement, click Add Child Party to confirm). Note, you have now added child(ren); other parties are covered later as "Involved Persons."

5. **SAVE:** Last, click the blue "**Save**" button in the upper right of the appointment profile to finish. Saving your appointment is mandatory but the "Save" button will not be available until you have successfully saved at least one child party (Step 4).

This appointment is now saved in CARES and will now show in **Cases > My Cases** (near top of left-side menu) for the appointed attorney.

Appeals and Litigation Support Case Setup Notes

Court of Appeals / Supreme Court

Before an appeals case has a case number, you can bill for appellate activities on the underlying case using the Activity Type "Appellate work, pending case number" in the "Legal Advocacy and Independent Investigation" group. However, as soon as the appeals case has its own case number, it should be opened as a new case in CARES under the appellate case number and all work related to the appeal should be billed in the attorney's appointment to that case. Follow the steps above to set up the case—when prompted for Judicial District, you can select "N/A."

Litigation Support

To record activities and bill if you are filling in for another attorney while they are out of town or if you are providing other Litigation Support such as mentoring, find the case via Cases > Search Cases as described in the steps above, and appoint yourself as the Litigation Support attorney to the case in the "Litigation Support" appointment capacity.

Required Placement Workaround

On Litigation Support appointments only, if you do not know the child's placement, select "Foster Home" from the placement type drop down menu. In description, enter "NA - Appeal." As a start date, enter the date of your appointment.

[Missing a Placement or Educational Setting?](#)

If you need to add a placement or educational setting to the lists in CARES, notify OCR using the form at tinyurl.com/AddInCARES.

While you are waiting for OCR to add the item, you can enter a temporary placeholder Placement by choosing Foster Home and entering the "Description" as "Waiting on OCR to add [placement you requested]." You can click on the child's name later, then check the box beside the placement and click "Edit Placement" to update it after OCR adds the item.

How to Enter Activities

You can only enter activities using the steps below *after* you complete Steps 1 - 5 in the previous section to set up your case appointment(s). Completing the steps below will enable you to submit an invoice to OCR. Please note, support staff with their own logins in your office *cannot* enter your activities on your behalf (they're not your proxy/delegate). The activities they enter with their logins will record their names and billing rates.

1. **Navigate to Cases > My Cases.** Under "Matching Appointments," you'll see the case numbers of open cases to which you're appointed.¹ Refine your list if needed by changing the search criteria along the top, then click the magnifying glass to apply the new criteria. You can also click on the column headers to sort the list.
2. Click on a **blue case number**. This will open all the details of your appointment to that case.
3. Click on the **Activities** tab (along the top, next to the Profile tab with the red underline).
4. Click the **blue "Add Activity" button**. Complete at least the red asterisked required fields, scrolling down as needed to enter:
 - a. **Activity Date** (date of service / date the activity occurred)
 - b. **Activity Group and Type**—choose a Group first based on CJD requirements to facilitate case management and compliance, then choose an activity type. Find a list of all activity groups and types to download or print for reference at <http://www.coloradochildrep.org/attorney-center/billing/>.
 - c. If the activity type is Court, enter a **Hearing Type**.
 - d. Each activity will default to "**Billable**"—you can change the Billable dropdown from "Yes" to "No" to make this a non-billable activity that will be excluded from invoices.
 - e. **Enter amounts** as needed. The minimum duration of an activity is 0.1 (6 minutes). (Billing policy reminder: You cannot bill OCR for items that are under 6 minutes; you can, however, aggregate activities of the same type to equal a minimum of 6 minutes on the same appointment. E.g., bill after reviewing 6 minutes' worth of emails on the same appointment.)
 - f. Check the checkbox next to each **Child Party in Attendance** if applicable. The check mark indicates the child attended. *If the activity is Court*, use the dropdown menu to the left of each child to record if s/he attended ("Yes"), did not attend ("No"), or that this hearing "does not pertain to" him/her.
 - g. Optionally, add a **note** and **attachment(s)** to this activity as follows. This is for specific notes/attachments that you only want to see when reviewing this activity in the future; those you want to search for as part of the overall appointment belong in the Notes or Attachments tabs.
 - *If needed*, click **Add Note** to add a note specific to this activity.

Entering Amounts:

In the Add Activity screen, you can tab, click, or (on a touchscreen) tap into any amount field and type an amount OR tab/click/tap into the field and scroll up or down with your mouse wheel to change the amount. You can also use the small up/down arrows to the far right of any amount field to fine-tune your amount.

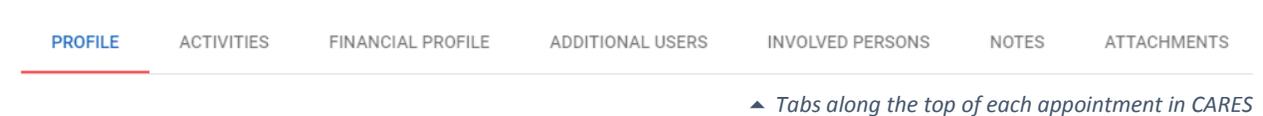
¹ Cases you're not appointed to may also show if you have multiple CARES users in your office. See *Cases > My Cases* at the beginning of this document and *Additional Users Tab: Adding Cases to Non-Appointed Users' "My Cases" List* later in this document.

- *If needed*, click the **blue Save button**, then click **Add Attachment**. (As noted on the screen in CARES, you must save the activity before you can add an attachment—that's why there are two Save options.)
5. Click the **blue "Save and Exit" button** in the lower right. This button is not available until you have entered data in all the red asterisked required fields.

Repeat steps 4 and 5 as needed to save additional activities to this appointment. To **view, edit, or delete** an activity you created, select the checkbox to the left of that activity, then click the View, Edit, or Delete Activity button. Note, you cannot edit/delete other users' activities, and you cannot delete an activity that is part of an invoice (any status including Draft).

Features of Each Appointment

In the sections above, you have already seen the Profile tab and the Activities tab of appointments. Each appointment to a case has these and several other tabs to assist in billing and case management.



Profile Tab

Find a summary of your case on the Profile tab: view the county/court, case type, nickname, appointed attorney, office, appointment capacity, appointment billing allocation, case billing percent, and child parties here. **If you change any of the items detailed below, be sure to save your changes by clicking the blue Save button in the upper right.**

Appointment Nickname

You can edit your nickname for this case as needed. The nickname is optional and is only for your office's convenience; nicknames are displayed in the Appointment header and on your "My Cases" list.

Appointment Billing Allocation

Please consult OCR's [Billing and Payment Manual](#) to learn more about the Appointment Billing Allocation. Read on to learn about how CARES will warn you as you run out of funding.

Warn When Billing Reaches (Percentage)

By default, each appointment will warn you when the total dollar amount of all activities is at or over 80% of the Appointment Billing Allocation. You can edit this percentage to any other whole number on each appointment. For example, if you have an appointment with a small allocation, it may be beneficial to see a warning when that appointment has reached only 50% of the allocation. Warnings appear on the Home Screen and on the appointment itself.

Note, you can also use the "Nearing Maximum Billing Allocation" filter on Cases > My Cases to view a list of your appointments that may need Additional Funding Requests (see *Financial Profile Tab: Request Additional Funding* for more on these requests).

Case Billing Percent

The billing percentage shown here is automatically applied to all un-invoiced activities. For some case types, OCR will only pay for services after a court finds one or more of the parties who is responsible for the cost to be indigent. E.g., if one party is indigent, the OCR will pay only the indigent party's portion, and the Case Billing Percent should show "50%." Be sure to consult OCR's [Billing and Payment Manual](#) about findings of indigence. For example, in applicable case types, it's important to remember that you should not ever enter activity dates earlier than the date of the finding of indigence; indigence must be determined prior to commencement of any work on the case. OCR does not honor *nunc pro tunc* indigency findings.

% Updated On

The "% Updated On" date only reflects the date OCR updated the case billing percent (above); it is neither considered in the percentage calculation nor relevant to any other aspect of the appointment. For the majority of appointments, this is the date the appointment was created in CARES (when the billing percent was automatically established).

Child Party Table

At the bottom of the Profile screen, you can find a table of child parties on this appointment. You can click on a blue Child Party name to edit his/her information, e.g., Applicability of ICWA, placement history, and educational setting history. If you open any Child Party information, click Save Changes at the bottom if you made edits; click Cancel to exit and discard any changes.

You can also click on the blue name of the Current Placement in the Child Parties table on the Profile tab. This is a shortcut to bring up that contact information if needed. "Close" when finished. If you need to change the placement history, click on the child's name instead (previous paragraph).

Notice the red icon to the right of Current Placement. Clicking it opens a new [browser tab](#) (separate internet window) with a Google map of the placement's address. The CARES application is still on your first browser tab; you can close the tab with the map when needed.

Activities Tab

The Activities tab is where you enter activities (see also *How to Enter Activities*). After entering activities, you can see each activity and the User who created it on the Activities tab. Columns include: Duration (total hours), Expenses (cost of non-duration items like mileage), and Amount (what you'll be paid—the math is (Duration x Persona Billing Rate + Expenses) x Billing Percent). You can click on the column headers to sort this table.

Working with Tables:

Examples of tables in CARES include the Child Party table on the Profile tab of an appointment and the Activities table on the Activities tab.

Most tables in CARES feature **search/filter** options above the table. You can click on most column headers in tables to **sort the contents** by that column in ascending order. Click again to sort in descending order.

At the bottom-right of each table, you will see "Rows per page" and other options to **view rows or pages that do not fit on the current screen**. Use this feature to move between pages of data or to display more data on the current page.

When you see a checkbox next to a row in a table, **checking the box will make additional buttons available** for that row's data. For example, checking the box beside an existing activity enables a button to "View" its details.

Notice the "From Date," "To Date," and other search filter options along the top of the Activities screen; use the blue magnifying glass to apply the filters. After you have many activities, these will help you find certain ones quickly. Click Reset to view all activities again. There is also a "Duration Total" at the bottom left of the screen—this calculates your total hours so far in real time.

Financial Profile Tab

The Financial Profile provides a financial summary of this appointment. Note, "Invoiced" status refers to *submitted* invoices. Activities from *draft* or *rejected* invoices are not considered "invoiced."

Clock Icon: Allocation History

You can click on the clock icon to the right of the Appointment Billing Allocation amount on the Financial Profile to view the history of your allocation and any changes resulting from Additional Funds Requests.

Request Additional Funding

This feature is only available to the appointed attorney. To request additional funds, the appointed attorney can click on the blue words Request Additional Funding below the other text on the Financial Profile. The request form that pops up summarizes the appointment's financial information. Enter a dollar amount in "Requested Additional Funds." "Projected Allocation" will update automatically to show your requested new allocation. Enter an Explanation—remember that you must support your additional funding request with a description of the legal work you anticipate is reasonably necessary as detailed in OCR's [Billing and Payment Manual](#). Check the certification check box. (You may need to scroll down to see all the items.) Last, click Submit. See also *Additional Funds Screen*.

Additional Users Tab: Adding Cases to Non-Appointed Users' "My Cases" List

This feature is only applicable if you have multiple CARES users in your office. **All users in your office can automatically access all the office's cases via Cases > Search Cases** (they can filter for your office or bar number). An attorney from your office must be appointed to a case, but it is *entirely optional* whether s/he or another staff member assigns other users from your office as "Additional Users." Assigning "Additional Users" on an appointment simply displays a shortcut to the case in the additional users' My Cases screen. This creates easier access for staff via "My Cases" and may be useful if you want to delegate only certain cases for certain staff, for example. View or edit existing Additional Users via the Additional Users table. Add an end date to an Additional User to remove a case from his/her My Cases list.

Involved Persons Tab: Non-Child Parties and Other Professionals

The Involved Persons tab is for recording *non-child* parties to the case and other involved persons. The blue **Add Involved Person from Contacts** button pulls an existing contact from My Contacts as a shortcut for persons you may add to multiple appointments, like case workers or therapists, instead of



▲ Yellow "autofill" suggestions come from your web browser, not from CARES.

Your Web Browser's "Autofill" Settings

Your web browser may be set up to "autofill" web pages for you. Note, this is not a CARES setting. Exercise caution if using autofill in CARES because autofill suggestions can be wrong. Autofill suggestions usually show in yellow, like in the image above. Learn more about autofill settings for your web browser [here](#).

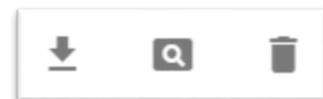
creating them as one-off contacts on each appointment. The **Add Involved Person** button, on the other hand, creates a one-off, new individual for just this appointment, e.g. a family member. (You can also check a box to save an involved person to My Contacts.) Edit or delete existing Involved Persons via this Involved Persons table.

Notes Tab

This is where you can type short notes (2,000 characters or less); Attachments (next) are better for long notes. Click the blue Add Note button to create and save a note. View, edit, or delete existing notes via the Notes table.

Attachments Tab

You can upload attachments here that pertain to the overall appointment rather than to a specific activity. Notice the search option—it requires full words and it searches document names and keywords. You will be prompted to supply keyword(s) when you add each attachment (OCR recommends choosing consistent keywords with your future searching in mind, e.g. "Psych Eval" or "IEP"). Next to each existing attachment, you will see an arrow button to download the attachment, a magnifying glass button to preview the attachment, or a trash can button to delete the attachment (pictured at right).



▲ Buttons to download, view, or delete an attachment

What Can My OCR Staff Attorney See?

OCR staff attorneys will *not* be able to view any attachments to a specific activity or any of your attachments on the Attachments tab. They also will not be able to see any of your notes that are entered on the Notes tab in an appointment. OCR staff attorneys CAN see everything else, including notes that are typed into the notes box within an activity. As such, please enter any confidential notes in the Notes tab rather than the notes field within a specific activity, or as an attachment.

Invoicing

Please consult OCR's *Billing and Payment Manual* posted at <http://www.coloradochildrep.org/attorney-center/billing/> for OCR's policies and rules about invoicing. Technical directions about how the Managing Attorney can generate and submit an invoice can be found in that manual as well because the technical directions and OCR policies for invoicing are easiest to follow in one place.

Additional Funds Screen

See also *Financial Profile Tab: Request Additional Funding*. After the appointed attorney makes an Additional Funding Request, it will go into a queue for OCR review. Alerts on the Home screen (what you see when you log in, or at the top of the left-side menu) will tell you when OCR approves or rejects a request. Click on the alert to review the outcome and any notes from OCR. Dismiss these alerts after review by clicking on them, then clicking the "Dismiss Alert" button in the upper right corner. Approved requests will automatically apply to the Appointment Billing Allocation after approval. If a request is rejected, you may need to submit a *new* request *if* OCR asked for additional information in the red notes on the rejected request form.

To review all your requests in all appointments, click Additional Funds on the left-side navigation menu. You will see a table of all your requests. Notice the "Status" and other search filter options along the top of the Additional Funds screen; click the blue magnifying glass to apply the filters. Click on a blue case number within the table of requests to open that specific request and view details, including any notes from OCR after approval or rejection. Within the request, you can also click on the blue case number to jump to that case (helpful, for example, if you need to submit another request).

You can delete and thereby withdraw a request if it is still in "Submitted" status (e.g. if you find a mistake). However, you can no longer do so after OCR has processed the request.

How to Close Appointments and Cases

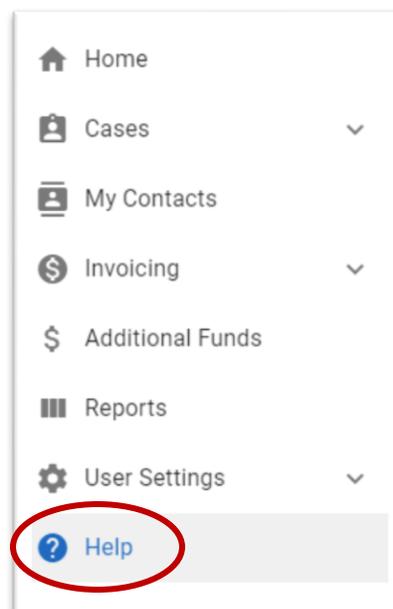
OCR's [Billing and Payment Manual](#) directs OCR attorneys to close appointments in CARES within seven days of the appointment ending. OCR uses your count of open appointments in CARES for many oversight functions and for budget reporting, and your reports, including those on the Home Screen, will not be accurate or as helpful to you without this crucial step. You will *not* be able to enter new activities on closed appointments, but your invoice *will* include all unpaid activities entered prior to the closing of the appointment—invoices do not look at the open/closed status of appointments.

To close one of your case appointments *after* entering any remaining activities, find the appointment in Cases > My Cases, then click on the name of a child party on your appointment. On the pop-up screen about the child, enter an end date and end reason under "Private Info," then "Save Changes." Repeat for each child. After ending the last child, CARES will notify you that your appointment is closed (click "Continue" to confirm). If you were the only attorney in CARES appointed on this case, CARES will then ask if the *case* itself is officially closed—if the answer is Yes, provide the date. (If, however, there is another attorney still appointed on the case, CARES will not prompt nor allow you to close that case. If *you* are coming off the case but the *case* is not officially closed, you should say "No" to this prompt to keep the case open for the next attorney to be appointed.)

To undo an accidental closure *or* if the Court "reopens" a case, you can find closed cases in Cases > Search Cases: be sure to use the "Closed" checkbox, enter only a couple search criteria like sequence and year, and click "Search Cases." Click on the blue case number to access the case. You can then "**Undo Close Case**" (for accidental closures) or "**Reopen Case**" (if the court officially "reopened" it) if needed, then find your closed appointment and reopen it if needed.

Help and Troubleshooting

The most efficient way to learn the system is by reading this document and the information posted at <http://www.coloradochildrep.org/attorney-center/billing/>. We also recommend searching our Help articles—within CARES, click Help on the left-side navigation menu to search for directions about specific functions as needed. Search for content by typing words in the upper right "Search Query" box,



▲ Help articles are available in CARES

then click the magnifying glass to search existing articles. Please consult these resources before contacting OCR with questions—OCR has a small staff and there may be some lag time before we can respond, so we have carefully crafted, updated, and streamlined our written directions for you.

You can resolve many technical problems right away if you [refresh your web browser](#) (only when you're at a stopping point with nothing unsaved). Do so by clicking the circular arrow icon near where you type a web address OR type the Ctrl + F5 keys (Windows) or Cmd + R keys (Mac) at the same time. See <http://inkdesign.ca/help/random/refresh-your-browser.html> for pictures of the Refresh button.

Remember, for CARES to perform properly, please make a habit of completely quitting your [web browser](#) application (Chrome, Firefox, Safari, etc.) daily. This may require more than just closing the window, especially on a Mac. This is good advice for many online activities. It is also a good habit to restart each device (computer, phone, etc.) once a week.

OCR's recommended web browser for CARES is Google Chrome. Firefox and Safari are also supported. **CARES does not perform well in Internet Explorer or Microsoft Edge.** You can download Chrome for free at <https://www.google.com/chrome/>. To avoid data loss, **please do not work on CARES in more than one web browser tab or window at the same time.**

Questions

If you have case-related or OCR policy questions, such as questions about the CJD requirements or how to categorize activities, please contact your OCR Staff Attorney (posted as "OCR Staff Attorneys by JD" at the bottom of <http://www.coloradochildrep.org/attorney-center/appointment-lists/>).

If you have billing and payment questions after reviewing OCR's [Billing and Payment Manual](#), email Brandy Lombardi at brandylombardi@coloradochildrep.org.

If you have technical questions after reviewing this document and the Help articles within CARES, email Rebecca Garrison at rebeccagarrison@coloradochildrep.org. For the fastest help, be sure to:

- Describe very precisely where you got stuck in the directions—this is crucial for OCR to be able to pinpoint the issue and provide support quickly.
- Visit <https://www.whatsmybrowser.org/> and send Rebecca the URL shown in the dark blue box (it will look something like this: "whatsmybrowser.org/b/ZDKS8D4"). This will provide Rebecca with technical specifications about how you access CARES to facilitate problem-solving.

