

# OCR CARES Billing and Case Management

## CARES Handbook

The Office of the Child's Representative (OCR) billing and case management system, CARES (Colorado Attorney Reimbursement Electronic System), is an online application which allows contract attorneys, paralegals, social services professionals, and support staff to record all case-related activity. The purpose of this document is to provide a "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 consult OCR's *Billing Policies and Procedures* and other essential resources—including future updates to this document—posted at <http://www.coloradochildrep.org/attorney-center/billing/>.

**For easy navigation, click on the Table of Contents topics below or on the blue hyperlinks throughout this document to jump to related sections or websites.** You can search for keyword(s) (e.g. "Password") in this document by typing Ctrl and F at the same time (Windows) or Command and F (Mac), then type the keyword(s) in the find field and click the arrows to view instances of the word(s) throughout this document.

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## Critical Security and Performance Notes

**You will store critical, sensitive data in CARES. Do not leave CARES logged in and unattended on any unlocked device. OCR very strongly encourages every user in every office to turn on two-factor authentication as soon as possible (see the easy steps in [Use Two-Factor Authentication](#)) and to [change his/her password](#) at least every three months.**

**OCR's recommended web browser for CARES is Chrome (<https://www.google.com/chrome/>). [Firefox](#) and [Safari](#) are also supported. To avoid data loss, **never access CARES via Internet Explorer or Microsoft Edge, and do not work on CARES in more than one tab or window of the same web browser at the same time.****

For CARES to perform best, please make a habit of completely quitting your web browser (Chrome, Firefox, or Safari) at least daily. On a Mac, this may require more than just closing the window. Restart each device (computer, phone, etc.) once a week for optimal performance.

## How to Access CARES

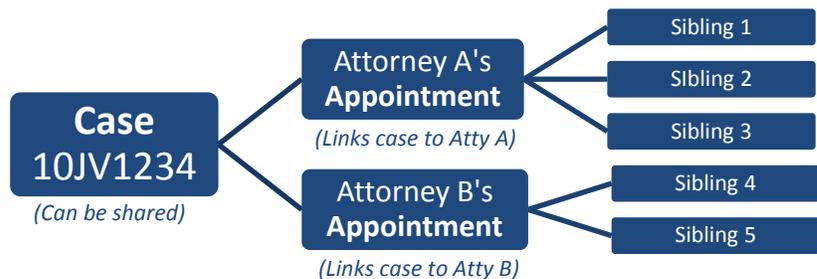
To obtain your CARES user name and password for the first time, complete the steps below.

1. Using [Chrome](#), [Firefox](#), or [Safari](#), go to <https://cares.coloradochildrep.org/#!/forgot>. (Click the link OR copy/paste it into your [address bar](#).) **Never access CARES via Internet Explorer or Microsoft Edge.**
2. Once at the link from Step 1, carefully type your email address at which you received this document and click Submit.<sup>1</sup> You will receive an automated email within a few minutes (usually after at least 3 minutes).<sup>2</sup> Note your **CARES user name** at the beginning of that email.
3. Go to the hyperlink in the email from Step 2. Enter *any password you would like* for the CARES application—you can make it up. Click the blue "Reset Password" button to save it.
4. Click the blue "Log In" button.
5. Enter your user name (it was at the beginning of the email from Step 2—not your email address).
6. Enter the Password you made up in Step 3.
7. Click the blue "Log In" button.
8. **Bookmark** [cares.coloradochildrep.org](https://cares.coloradochildrep.org) and visit that address any time from now on to log into CARES using [Chrome](#), [Firefox](#), or [Safari](#). Never access CARES via Internet Explorer or Microsoft Edge.

## CARES Fundamentals

**Maximize your efficiency: Understanding the three essential terms and the diagram below *before getting started* with the rest of the handbook makes it much easier to learn CARES.**

- **CASE:** A "case" comprises *only* a case number (court, year, case type, sequence) and a date the court opened that case. A case is sometimes shared in CARES—more than one office can be "appointed" to each case. Sometimes your case already exists in CARES *before* you are appointed to it.



- **APPOINTMENT:** An "appointment" in CARES is what links a case to an OCR attorney and to specific child(ren) whose interests are represented by that attorney (see diagram). Your appointment—not the case—is exclusive to you and your office.
- **CHILD PARTIES:** Your appointment may include *multiple child parties* (see diagram).

## Overarching Tips

Along with the essential diagram above, below are a few tips that are helpful to know upfront:

- 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.

<sup>1</sup> If you see a message that your address is "not in our records," check for any typos or extra spaces in Step 2 and confirm you are using the email address at which you received this document from OCR (it is registered with your CARES account).

<sup>2</sup> 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, contact OCR for help. The link from Step 3's email will expire after 30 minutes—you will need to start the steps over for a fresh link if 30 minutes have passed.

- **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.
- 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.
- **Avoid costly case number errors.** Because cases can be shared (see [CARES Fundamentals](#)), CARES locks case information after creation: the year, JD, court/county, most case types, and case sequence [cannot be edited later](#). *Always check your case information before saving to avoid irreversible case number errors.*
- **Saving matters.** Clicking either "Cancel" or an "X" in the corner of a window in CARES will close the current screen *without saving changes*. Look for a "Save" button instead if you want to save your changes.
- **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.*
- **Protect your data** with two-factor authentication (see the easy steps in [Use Two-Factor Authentication](#)).

## Main Navigation

### 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 to go to each area.

### Zoom In or Out

On supported web browsers (Chrome, Firefox, Safari), 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.

### Home Screen

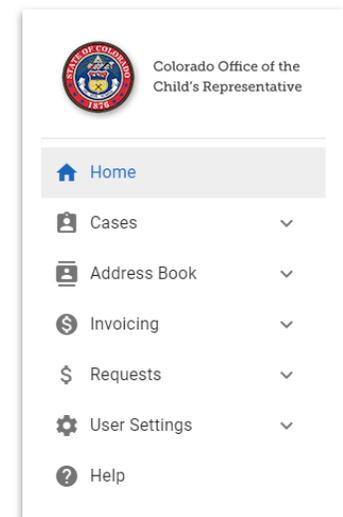
Upon logging in to CARES, you will see the Home Screen. After you have appointments and invoices, this screen will show case and child counts, important announcements from OCR (click on them to read), various alerts, and charts of your caseload and invoicing. The charts record monthly points in time,<sup>3</sup> so they will look blank until next month. Notice the blue "Enter Activities" button—after you enter appointments, you can select one from the "Open Appointments" dropdown to the right and click "Enter Activities" as a shortcut to the activities in that appointment.

### My Cases

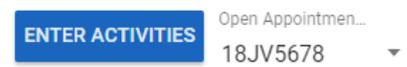
After completing [How to Enter an Appointment](#), you will be able to click on Cases > My Cases to find the cases to which *you* are *appointed* (as opposed to all the cases in CARES in [Search Cases](#)). There are also search options



▲ *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*



▲ *"Enter Activities" button*

<sup>3</sup> You will submit an invoice at one point in time and OCR will pay it at another. If those events do not land in the same month, this chart may show a mismatch in your invoiced vs. paid amounts for the months in question.

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. Click on the column headers to sort the list.

- If you are not appointed on some or all cases in your office, you can still use the My Cases tab—see [Additional Users Tab](#).
- Attorneys managing other attorneys will see all their office's appointments here.
- If either of the notes above applies, appointed attorneys 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*.

## Search Cases

On the left-side 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 "Search Cases" or type the Enter key after you add criteria to activate your search. You can click "Reset" to remove all search criteria. **Using as few search criteria as possible is the fastest way to find a case**—for example, searching only a county and sequence (e.g. 4321) usually returns a manageable list of cases. **Note that it is useless to search cases by attorney, office, or child if their [appointment](#) does not yet exist** (see [CARES Fundamentals](#)). After finding a case, click on its 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 attorney's name to access [more details](#).

### Search Tips

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

*Save effort by entering minimal case search criteria (e.g. county + sequence is usually enough); add other criteria only if needed to further refine the results.*

## How to Enter an Appointment

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



- 1) **SEARCH ALL CASES:** It is fastest to start by searching all cases with as few search criteria as possible. Click on **Cases > Search Cases** on the left-side menu. At the top, enter *only* your case's **Court/County, 4-digit year, and/or Case Sequence**. (The end of a case number is the sequence, e.g. 12JV1234.)
- 2) **IDENTIFY YOUR CASE:** Click on the **blue Search Cases button**. (No cases will ever show until you click this button.) If you see your case listed, go to (a) below. If not, go to (b).
  - a) **If your case DOES appear** under "Matching Cases," **click on its blue case number**. Double-check the **Date Opened by Court**. If needed, correct the date and click the **blue Save button**. Go 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) and your search criteria will transfer into a 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). **Always double-check all case data—it will be unalterable**

**after saving!**—then click the blue **Save** button. The case is now available in Cases > Search Cases, but it is not in Cases > My Cases until you create an appointment in Step 3.

↳ *If you see a warning that a duplicate case already exists, repeat Steps 1 and **2a**, searching only county and sequence for open and closed cases. If you find the right case number with the wrong case type, correct the case type as well during Step 2a. See [How to Reopen Appointments and Cases](#) if needed. You can always proceed if another attorney is already appointed, but please **notify OCR** if s/he is appointed in error or if s/he was appointed when you changed a case type—OCR will assist the other attorney.*

↳ *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](#) per OCR's Billing Policies and Procedures.*

### Entering Dates

*When you click on a date field, a calendar opens, and you can **scroll up with your mouse wheel or touch pad to go back in time**. Or use the keyboard arrows to change dates in the calendar. Click on any month inside the calendar to show more months for faster scrolling.*

*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.*

**3) APPOINT TO CASE:** Click the blue **Create Appointment** button (near the top right of the screen). As illustrated in [CARES Fundamentals](#), create one appointment per case and later add one *or more* children to the single appointment. Do not create an appointment for each sibling on the same case.

- a) Select the **Attorney Name** of the attorney appointed from your office.
- b) Select the correct **Appointment Capacity**.
- c) Optionally, type in an [Appointment Nickname](#).

**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 do not 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 past dates you need are unavailable, 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. If you see an asterisk by "Placements," it means one is required; **add at least one placement by clicking "Add Placement" or "Add Saved Placement"** (learn about saved placements in [Address Book > My Placements](#)). 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. 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 beside the placement and clicking "Edit Placement."

 *Later, remember to add a placement **end date** before recording the next 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 "[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](#) for the appointed attorney. See [Child Party Table](#) when you need to update a Child Party in the future. See [Additional Users Tab](#) for how your staff can access this appointment.

## Appeals, Litigation Support and Mentoring Appointments

### *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 in [How to Enter an Appointment](#)—when prompted for Judicial District, you can select "N/A."

### *Litigation Support and Mentoring*

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, find the case via Cases > Search Cases as described in the steps above, and appoint yourself to the case in the "Litigation Support" appointment capacity. Mentors should use the "Mentor" appointment capacity.

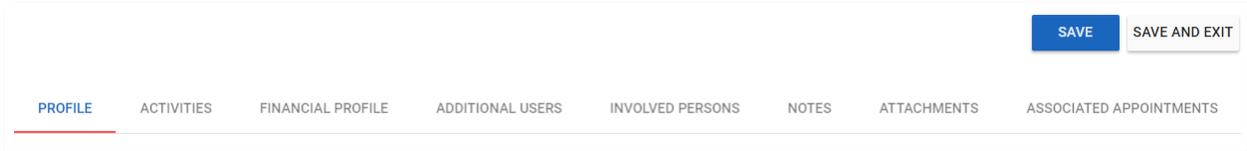
### [Missing a Placement or Educational Setting?](#)

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

## Features of Each Appointment

In [How to Enter an Appointment](#), you saw the Profile tab of appointments. The [Profile](#) and [Activities](#) tabs are where you will spend the most time, but each appointment to a case has these and several other tabs to assist in billing and case management. **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.**



▲ *Tabs and Save buttons along the top of each appointment in CARES*

### Profile Tab

Find a summary of this appointment 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.

#### *Appointment Nickname*

You can edit your nickname for this appointment as needed. The nickname is optional and is only for your office's convenience; CARES displays nicknames in the Appointment header, on your [My Cases](#) list, and in a few other places where your appointments are listed for you.

#### *Appointment Billing Allocation*

Please consult OCR's [Billing Policies and Procedures](#) 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 show on the [Home Screen](#) and on the appointment itself.

👉 *Note, you can also apply the "**Nearing Maximum Billing Allocation**" filter on Cases > My Cases to view a list of your appointments that may need Additional Funding Requests (see [Request Additional Funding](#) for more on these requests).*

#### *Case Billing Percent*

The billing percentage shown on the Profile 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 Policies and Procedures](#) about findings of indigence. For example, in applicable case types, remember that you should never enter activity dates earlier than the date of the finding of indigence; OCR does not honor *nunc pro tunc* indigency findings.

#### *% Updated On*

The "% Updated On" date only provides a record of the date OCR updated the case billing percent (above); it is not considered in the percentage calculation. The percentage calculates retroactively to *all* un-invoiced activities

regardless of date. For most appointments, the "% Updated On" date is the date the appointment was created in CARES (when the billing percent was automatically set).

### *Child Party Table*

At the bottom of the Profile screen, you can find a table of child parties on this appointment—notice the summary data on the right side of the table, including "Latest Visit" which pulls from your [activities](#). 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. To indicate a child is no longer active in this appointment, enter an end date and end reason. If you edit any Child Party information, scroll to the bottom of the pop-up window to click Save Changes, or 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. Click "Close" when finished. If you need to *change* the placement, click on the child's name instead and be sure to enter an end date in the previous placement.

Any inactive child parties (with an end date) on this appointment are automatically hidden; select the "Show Inactive Children" checkbox above the table to show them in the table.

### **Google Maps**

*If you see this red map icon near placements, educational settings, or other addresses, click on the icon to open a new [browser tab](#) (separate internet window) with a Google map of the address. The CARES application will remain on your first browser tab; you can close the tab with the map when finished with it.*

### **Activities Tab**

Activities—such as conducting research, attending meetings, or going to court—are the foundation of invoices and of most CARES reports. Please note, support staff with their own logins in your office *cannot* enter your activities on your behalf (they're not your proxies/delegates). The activities they enter using their logins will record their names and billing rates.

### *How to Enter Activities*

You can only enter activities as described next *after* you complete Steps 1 - 5 of [How to Enter an Appointment](#). (You do not need to repeat Steps 1 and 2 below if you are already on the Activities tab of an appointment.)

- 1. Navigate to Cases > My Cases.** Click on a **blue case number**. This opens all the details of the appointment.
- 2.** Click on the **Activities** tab (along the top, next to the Profile tab with the red underline).
- 3.** 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; cannot occur before the earliest child party start date)
  - b. Activity Group and Type**—choose a Group first based on CJD requirements, 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, select one or more **Hearing Type(s)**.
  - d.** Each activity will be pre-filled as "**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).<sup>4</sup>
  - 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 or Mediation*, 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. Add **note(s)** and **attachment(s)** to this activity as described below. This is for notes/attachments that are specific to this activity; notes/attachments pertaining to the overall appointment can go in the [Notes](#) or [Attachments](#) tabs. (See also [What Can My OCR Staff Attorney See?](#))
    - *If needed*, click **Add Note** to add a note specific to this activity. Change the date if desired.
    - *If needed*, click the **blue Save button**, then click **Add Attachment**. Change the date if desired. (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.)
4. Click the **blue Save and Exit button** in the lower right. This button is not available until you have entered data in all the asterisked required fields.

### 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.*

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 on an invoice—to correct an invoice or if you cannot delete an activity, see [Removing Activities from Invoices](#).

### Schedule Activity

Click the **Schedule Activity button** in the upper left to store an upcoming activity for this appointment. Learn more about this optional feature in [Upcoming Activities](#).

### Standard View

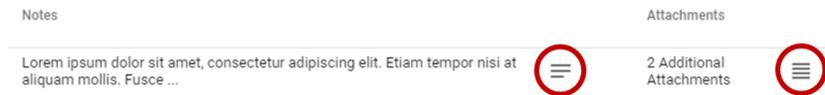
After entering activities, you can see each activity and who created it on the Activities tab. The list of activities goes from newest to oldest unless you change the sort order. Click on the column headers to change the sort order based on that column. Columns include: Duration (total hours), Expenses (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). The "Invoiced" column refers to *submitted* invoices. Activities from *draft* or *rejected* invoices are not considered "invoiced."

### Activity Notes View

For a notes- and attachments-based view of activities, click on **Go to Activity Notes View**. This view shows previews of the notes on each activity and allows you to search among all your activity-specific notes by typing full words in the "Note Search" box and clicking "Search." This view also displays any attachments on each activity with buttons to download or preview attachments (see also [Attachments Tab](#)). Click on the three bars circled below to expand the full notes or a list of attachments.



<sup>4</sup> [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.



▲ Click the circled bars in Activity Notes View to see more notes or attachments.

Notice the "From Date," "To Date," "User," and other search filter options along the top of the Activities screen; use the "Search" button to apply the filters. After you have many activities, these will help you find certain ones quickly. Click Reset to clear your search criteria. 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 per OCR's [Billing Policies and Procedures](#). Scroll down to check the certification check box and click Submit. See [Additional Funds Queue](#) for monitoring a request after it is submitted.

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

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. Click **Add User** to add one user at a time or **Add My Office** to add this case to the My Cases list for *all* current CARES users in your office at once. 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.

The Additional Users tab is only applicable if you have multiple CARES users in your office. **Whether you assign Additional Users or not, all active CARES 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.

## 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 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

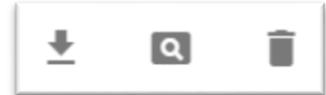
Contacts.) Edit or delete existing Involved Persons via this Involved Persons table—but note, if you created the contact in My Contacts, you must edit it there.

## Notes Tab

This is where you can type notes (4,000 characters or less) that are not specific to one activity; Attachments (next) may be better for very long notes. Click the blue Add Note button to create and save a note. View, edit, or delete existing notes via the table of notes on the Notes tab.

## 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). The Attachments tab will also show and search attachments you uploaded to a specific activity in the [Activities tab](#); note that activity-specific attachments can only be *deleted* via the original activity, not the Attachments tab.



▲ Buttons to download, view, or delete an attachment

## Associated Appointments Tab

The Associated Appointments tab optionally allows you to "associate" or group this appointment with any number of other appointments for the same attorney, then use this tab on each appointment as a shortcut to that "Appointment Group." **After creating a group, you will also have the *option* to automatically update a child party's information throughout all appointments in the group after revisions.** (This must be for the exact same child appointed to the same attorney and part of the same group.) Note, simply creating a group does not synchronize child parties. You must initiate the sync by making a revision to a child party within an existing Appointment Group. You can always decline to "Apply changes to associated appointments"—you can make another revision later or on another appointment and agree to the update then.

After creating a group, you can filter the [Cases > Office Activities](#) screen for that Appointment Group, allowing you to find activities across the group rather than searching one appointment at a time. [Billing policy](#) reminder: There is no split billing among the appointment group—you still need to choose one appointment at a time from the group when you're entering activities.

### To create your first appointment group:

- 1) On an existing appointment's "Associated Appointments" tab, click "Add to Appointment Group."
- 2) Start a new group—click "Add to New Appointment Group" and type a memorable group name.
- 3) Click "Create new appointment group," then be sure to "Save" the appointment to finish.

### To add another case to the appointment group: (after the steps above)

- 1) On an existing appointment's "Associated Appointments" tab, click "Add to Appointment Group."
- 2) Select an existing appointment group's checkbox from the list (list may take a few seconds to appear).
- 3) Click "Select Appointment Group," then be sure to "Save" the appointment to finish. This case is now part of the appointment group you selected.

**To update Child Party data throughout a group:** This will *replicate* a Child Party's "Private Info" from *one* appointment to the exact same child appointed to the same attorney and part of the same group; it does *not* warn if you opt to update everything to a worse version of the data.<sup>5</sup>

- 1) Update one appointment's child party data thoroughly—make sure the child party's "Private Info" *including all blanks and history of placements and schools* is exactly how you will want it on *all* the cases in the existing appointment group.
- 2) Click Save on the child party—you will see a message asking if you want to replicate this information on the other cases in the group.
- 3) Click "Apply changes to associated appointments." You will now see the exact same child party information on this child throughout the group.

18JD123 Child: Jimmy	<ul style="list-style-type: none"> <li>• Applicability of ICWA: <b>Blank</b></li> <li>• Does child want to attend court? <b>Yes</b></li> <li>• Placement: <b>Aunt's house</b></li> </ul>	<p>◀ In this example, pretend you updated 18JD123 and selected "Apply changes to associated appointments." That means 18JD123's information now takes over. Jimmy's other case in the group, 18JD456, will get the updates shown in red. <b>It does not matter if the other case(s) had different or more complete history to start with—Jimmy now has a mirror image of 18JD123 throughout the group.</b></p>
18JD456 Child: Jimmy	<ul style="list-style-type: none"> <li>• Applicability of ICWA: <b>No Blank</b></li> <li>• Does child want to attend court? <b>Blank Yes</b></li> <li>• Placement: <b>Uncle's Aunt's house</b></li> </ul>	

## Additional Funds Queue

After you have made at least one request using the [Request Additional Funding](#) button within an appointment, you can find and monitor your own requests across all appointments by clicking **Requests > Additional Funds** in the left-side navigation menu. This screen shows a table of 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 red notes from OCR after approval or rejection. **Alerts on the Home Screen will also tell you when OCR approves or rejects a request.** Click on the alert to review the status change and any red notes from OCR. Dismiss Home Screen alerts after review by clicking on them, then clicking the "Dismiss Alert" button in the upper right corner—the request can still be found in Requests > Additional Funds.

Approved requests will automatically apply to the Appointment Billing Allocation after approval. If OCR rejects a request, you may need to submit a *new* request *if* OCR asked for additional information in the red notes on the rejected request form. Within each request in Requests > Additional Funds, you can click on the blue case number to jump to that appointment (a shortcut 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.

## Invoicing

For OCR's policies and rules about invoicing, please consult OCR's *Billing Policies and Procedures* posted at <http://www.coloradochildrep.org/attorney-center/billing/>. Below are technical directions for the Managing Attorney to generate and submit an invoice.

<sup>5</sup> The only exception is when you start from a case with zero placement data: because placements are required in some case types, CARES will *not* propagate zero placement data to associated appointments containing placement data.

## How to Generate an Invoice

Access the invoicing function in CARES by selecting **Invoicing > Invoices** from the left side navigation. This will display all invoices for the office. Click on the column headers in the table of invoices to sort those columns; search for an invoice by date or status using the filters at the top. Click on a blue invoice number to open it.

To generate a new invoice, click the blue **Generate Invoice** button in the upper right of the screen. The CARES application automatically populates the **From Date** and **To Date** to be the first and last day of the prior month, but the user can edit both dates to view a temporary draft or if granted an exception from the Executive Director for a final invoice per OCR's billing policies. Once the date range is correct, click on the **Create Invoice** button.

## Invoice Features

Clicking "Create Invoice" at the end of the last section takes you to the invoice itself with the following options at the top of the screen. Note, large invoices can be slow to load.

- **Clock icon** to the left of the buttons: Click this clock icon to view this invoice's history. This is useful for tracking the invoice's review and payment after it is submitted.
- Go to **Date View** / Go to **Standard View**: Toggle between two different ways to display activities. Date view allows a quick view of hours per day per user.
- **Expand All / Collapse All**: Display all or none of the detail rows with one click (can be slow to load).
- **Print**: Opens your web browser's print dialog if you would like to print the invoice (or print to PDF). OCR recommends printing in "Landscape" orientation.
- **Delete**: If the invoice is in Draft status, you can delete it without impacting any of the activities themselves. This enables you to create temporary Draft invoices—but be sure to delete them if you're not going to submit them. If the invoice is not in Draft status, this button is not available.
- **Exit**: Return to the list of all invoices.
- **Submit Invoice to OCR**: The Managing Attorney can click this button after s/he is satisfied that the invoice is accurate. It will be sent to OCR for review/payment and cannot be edited after submission. Other user types (e.g. paralegal) do not have access to this button.
- **Recreate Invoice**: This is equivalent to deleting your draft and starting over at the Generate Invoice step with the same date range. If you or your support staff add/delete/change any activities for the invoice's time period, you can click this button to update the contents.
- **Flag icon** to the right of the buttons: Click this flag icon to temporarily adjust the thresholds for the red and yellow clock icons shown in the invoice itself (more below).

Within the invoice body, features include:

- Click on a **blue plus (+) sign** to view more detail; click on a **blue minus (-) sign** to collapse the detail under that row. (Note the "expand/collapse all" buttons at the top as well.)
- **Red and yellow clock icons**—by default, red icons show you days at or over 12 hours and yellow icons show days at or over 10 hours. Adjust these thresholds temporarily however you wish by clicking the small flag icon to the right of the buttons along the top. (These flags are only to assist in your review; they do not mean OCR will necessarily reject the invoice.)
- **Case numbers are hyperlinks** to the appointment itself—click on a blue case number to jump to that appointment if you need to review notes or make edits.
- If you see a red-labeled **Insufficient Funds (Not included in totals above)** section at the bottom of the invoice, this alerts you to cases which have exceeded the [Appointment Billing Allocation](#) and are therefore excluded from the invoice. See also [Request Additional Funding](#)—after a funding request leads to sufficient funding, the case will no longer show under "Insufficient Funds" on new invoices.

## Submitting an Invoice

Once the Managing Attorney is satisfied that the draft invoice is accurate, s/he can submit it to OCR for review/payment per OCR's [billing policies](#) by clicking on the **Submit Invoice to OCR button** in the upper right of the page. If anyone edited the office's activities since the time the draft was created, a warning will pop up that activities have changed, and you can "Recreate Invoice" to capture then review the changes.

After certifying the required language and submitting the invoice, the Managing Attorney can find the submitted invoice in the Invoicing > Invoices page. OCR recommends double-checking that your recently-submitted invoice is listed here with "Submitted" status—if not, you may have missed a step. The Managing Attorney for the office will also receive an [email notification](#) that the invoice was submitted (provided s/he has not disabled email notifications in User Settings). Please consult OCR's [Billing Policies and Procedures](#) for more on why and how submitted invoices are approved or rejected.

## Removing Activities from Invoices

CARES only allows each activity to appear on one invoice. **Activities included on a draft invoice may be edited but cannot be deleted and are not available to be included on any other invoice unless you delete the draft invoice first.** Deleting a draft invoice *does not* delete the activities it contains. If you cannot delete an activity, a) it may be on an existing invoice and/or b) it may have been created in another user's account:

- a) If you cannot delete your own activity, look for it on an existing invoice, being sure to check all draft invoices. **To delete an activity from a draft invoice**, delete the draft invoice first, then navigate to the activity in the [Activities tab](#) to delete it. After an invoice is *submitted*, its activities can never be deleted. If OCR *rejects* a submitted invoice, you can edit and/or invoice its activities again if they are valid. **To remove activities from an invoice after rejection**, edit them to mark them "Non-Billable" if they should *not* be invoiced/paid. Be sure to check the box "I understand this activity is not billable" near the save buttons in order to save this change.



I understand that this activity is not billable.\*

CANCEL SAVE SAVE AND EXIT

▲ You must check an extra box near the save buttons on non-billable activities to confirm.

- b) If an activity was created in another user's account, it must also be edited or deleted in that account—**remember each user can only edit or delete his/her own activities.**

## Missing Activities on Invoices

If you do not see an activity you expected to see on an invoice, make sure a) the activity date falls within the invoice's date range; b) the activity is not on any other invoice, including drafts (see [Removing Activities from Invoices](#)); c) the activity is not listed in "Insufficient Funds" at the bottom of the invoice (see [Invoice Features](#)); and d) the activity is not "Non-Billable" (see [How to Enter Activities](#)).

## How to Close Appointments and Cases

OCR's [Billing Policies and Procedures](#) direct OCR attorneys to close appointments in CARES within seven days of the appointment ending.<sup>6</sup> OCR uses the count of open appointments in CARES for many oversight functions and for budget reporting, and your reports, like those on the [Home Screen](#), will not be accurate or as helpful to you

<sup>6</sup> OCR recognizes that a judge may issue an order ending an appointment that is *nunc pro tunc*. In that circumstance, the attorney may use the date they *received* the final order as the appointment end date.

without this crucial step. You will *not* be able to enter *new* activities on closed appointments, but your invoice *will* capture un-invoiced activities entered prior to closure so **you can be paid after an appointment ends**—invoices do not rely on 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.<sup>6</sup> 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.

## Case Number Errors

**CARES locks case information after creation: the year, JD, court/county, most case types, and case sequence cannot be edited later.** Avoid irreversible case number errors by double-checking the accuracy of your case number *before* creating your appointment in [How to Enter an Appointment](#). A case can be shared in CARES—more than one office can be "*appointed*" to it—so nobody can edit this fundamental information after creation.

If you discover that your saved appointment has the wrong case number:

- For an error in Date Opened by Court: Find the case via Cases > Search Cases (*not* My Cases). Click on the case number with the error, then edit the date, then click Save. *Note, no one will be able to create an appointment or enter work before this date, and it must be on or before the start date of all appointments to the case.*
- For an error in Case Type *only if* the error does not change the 2-letter abbreviation (e.g. D&N EPP and Non-EPP are both "JV"): Find the case via Cases > Search Cases (*not* My Cases). Click on the case number with the error, edit the case type, then click Save. *You only have the option to change the case type if the 2-letter abbreviation does not change. Please notify OCR if your allocation needs updating based on the new case type OR if another attorney is also appointed when you change a case type—you can make the change and proceed, and OCR will assist the other attorney.*
- For any other error, you must end the appointment and start over to create a new appointment to the correct case to prevent inaccurate billing. To do so:
  - 1) If you have *not* entered any activities on the error appointment, skip to 3.
  - 2) If you *have* entered any activities on the error appointment:
    - a) If you have *not* submitted an invoice for some or all activities, delete any draft invoice(s), then delete un-invoiced activities to prevent inaccurate billing.
    - b) If you have *submitted* an invoice but have not been *paid* on some or all activities, you can no longer delete all activities. Complete (a) above if applicable, then email OCR to reject the invoice; after OCR does so, edit the activities that were on the rejected invoice to be non-billable.
    - c) If you *have been paid* for some or all activities, complete (a) and (b) above if applicable, then email OCR explaining the error, that you were already paid on some activities, that you will close the error appointment, and that you will not double-bill OCR for any already-paid activities. OCR must maintain that documentation. Then proceed to 3 below.
  - 3) To close the error appointment, click on each child party name and enter an end date with reason "Opened in error." After the last child party, 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 the correct case number using the steps in [How to Enter an Appointment](#).

## How to Reopen Appointments and Cases

Occasionally you may need to undo an accidental closure, or the Court may officially "reopen" a case. In either scenario, you can **find the closed case in [Cases > Search Cases](#)**: be sure to search using the "Closed" checkbox, enter only a couple search criteria like sequence and year, and click "Search Cases." Click on the blue case number to edit the case. You can then click one of the following buttons:

- "Undo Close Case" (for *accidental* closures)
- "Reopen Case" (*if* the court officially "reopened" the case)

Next, you can find your closed appointment and reopen it if needed—it will behave like it did not end, and your activities and billing allocation will be intact. Alternatively, you can click "Create Appointment" on the case to start a new appointment if that is valid.

## Case Management Facilitation

The features below offer optional ways to streamline case and data management.

### Office Activities

After entering activities in [How to Enter Activities](#), you will be able to click on Cases > Office Activities to find and filter all your office's activities across all cases. Notice the date, user, and other filters along the top of the screen to refine your list of activities. Click on the "Go to Activity Notes View" button at the top for a notes- and attachments-focused view of the same list. Type a key word from one of your notes into "Note Search" to filter the list for only those items containing a specific note. Notice the [Appointment Group](#) filter at the top— *if* you have created such a group, this filter allows you to view activities from only that group of appointments (e.g. several JDs with the same child). You cannot *edit* activities from this view but you can click the checkbox beside any activity to open it and view details.

### Upcoming Activities

Cases > Upcoming Activities offers a simple calendar function within CARES. After you have at least one appointment in your office, you can schedule upcoming activities at Cases > Upcoming Activities or directly from an appointment's [Activities tab](#). Click the **blue Add Activity button** to add an upcoming activity to your calendar. You can note the scheduled time in the title of your upcoming activity if it is helpful. After the activity passes, you can click on it from Cases > Upcoming Activities, then "Save Final Activity" to convert it to a regular [activity](#) for invoicing.

### Address Book

#### My Contacts

Address Book > My Contacts 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 [Involved Persons Tab](#). Click the **blue Add Contact button** to save a new contact here. You can check a box to mark a "Favorite" and later filter your My Contacts list for

### Working with Tables

*Examples of tables in CARES include the [Child Party table](#) and the [Activities table](#).*

*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 these to move between pages of data or to display more data at once.*

*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 item activates a button to "Edit" its details.*

"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.

While creating Involved Persons within appointments, you will also have an option to "Save this Involved Person to My Contacts" on the fly to store any contact for reuse.

### *My Placements*

When you enter [child party](#) information for your appointments, CARES will let you choose from a preset list of placements (detention centers, group homes, hospitals, residential treatment facilities, and shelters) OR you can type in details of a specific foster home or other placement type. The Address Book > My Placements screen lets you save a list of your *own* foster homes or other placements for repeated use on multiple appointments. Click the **blue Add Placement button** to save a new placement here. Complete the red/asterisked required fields, then click "Save." On the My Placements screen, check the checkbox beside an existing placement to edit or delete it.

While creating placements within appointments, you will also have an option to "Save this Placement to My Placements" on the fly to store any placement for reuse.

## User Settings

### General Settings

Click on User Settings > General Settings at the bottom of the left-side menu to access the following settings:

#### *Invoice Update Emails*

Managing Attorneys can check or uncheck the checkbox beside "Invoice Update Emails" to turn email notifications of invoice status changes on or off. When this setting is on, Managing Attorneys can also check the box beside other users in the office to send them the same email notifications of invoice status changes. Click "Save" to save your changes. Invoice email notifications about each invoice occur at the following times:

- If OCR rejects an invoice at any stage
- When the OCR Billing Manager approves the invoice (review 1)
- When OCR Finance approves the invoice (review 2)
- *When the state accounting system issues payment, you may receive notification from them*
- When OCR marks the invoice as having been "Paid" by the state accounting system

#### *Notify About Upcoming Activities*

Each user can elect whether the Home Screen includes alerts about Upcoming Activities. Check or uncheck the box beside "Notify About Upcoming Activities" to show or hide alerts 48 hours in advance of your own upcoming activities on your Home Screen. Be sure to "Save" your setting.

### "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 are often highlighted yellow or blue, as shown below. Learn more about autofill settings for your web browser [here](#).*

esimon

emusk

esimon

evedder

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

### *Use Two-Factor Authentication (Recommended)*

Two-Factor Authentication protects your highly sensitive CARES data by occasionally sending a text message to your phone to ensure that it is *you* who is logging in.<sup>7</sup> After setting up two-factor authentication, even if your password is compromised, no one can access your account from another device without *your* mobile phone in hand. ***OCR strongly recommends two-factor authentication for each user in each office.*** You will be prompted for a code once every 90 days on any device you use to access CARES (or after you opt to [clear your web browser cache](#)).<sup>8</sup> Every 90 days, you will receive another text on your phone upon login to verify it's still you.

**To turn on Two-Factor Authentication (recommended):** (have your mobile phone nearby)

1. Click on User Settings > General Settings on the left-side navigation menu.
2. Check the box beside "Use Two Factor Authentication (Recommended)."
3. Enter your mobile phone number in the space provided.
4. Click the blue "Save" button in the upper-right.
5. Follow the prompts to verify your device by entering a 6-digit code texted to your phone.
  - If you do not receive a text with a 6-digit code, click "I didn't receive a text," and then try again. Make sure there are no typos in the number and that this phone is in your possession and can receive texts.

After completing the steps above, the next time you log into CARES, you will be prompted for another code sent to your phone. To keep your account secure, this will recur every 90 days, or when you use a new device or clear your web browser's cache. You can update this setting or your mobile number by returning to User Settings > General Settings at any time—**if your mobile number changes, be sure to update this setting as soon as possible.**

### *My Default Judicial District*

Each user can select a default [Judicial District](#) from the dropdown and click Save, and then that district will automatically pre-fill each time you create a new case (see *How to Enter an Appointment*). This saves a step during case creation, but you can always override the pre-filled district while creating a case.

### *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. Click "Save" after entering your new password.

### *My Office*

This screen shows all the CARES users in your office, whether they're "active" (able to log in), and each "Persona" (i.e. user type, like Paralegal). Refer to this screen regularly to keep your office's CARES users up to date. Managing Attorneys can:

- Request to add support staff at <https://fs30.formsite.com/COCR/AddToCARES/index.html>.
- Request to add SSPs at <https://fs30.formsite.com/COCR/RequestSSP/index.html>.
- [Contact OCR](#) to deactivate users.

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<sup>7</sup> OCR is not responsible for text and data rates that may apply depending on your mobile carrier plan.

<sup>8</sup> If you set up two-factor authentication in CARES and you are prompted for a text code more frequently than every 90 days, your web browser may be set to clear its cache automatically at certain intervals. You can do a web search to learn how to change that setting in most browsers if desired, but OCR is not able to provide one-on-one support for individual web browser settings.

## Personas and Permissions

Not all user types or "personas"—e.g. Case-Carrying Attorney, Paralegal, or Social Services Professional (SSP)—have the same "permissions" (abilities) within CARES. Please see the chart below for personas and permissions. The permissions refer to actions that are detailed throughout this handbook.

<b>Permission</b>	<b>Managing Attorney</b>	<b>Case-Carrying Attorney</b>	<b>Non-Case-Carrying Attorney</b>	<b>Paralegal</b>	<b>SSP</b>
<i>Be Appointed to Cases</i>	✓	✓	✗	✗	✗
<i>Create/Edit Additional Users</i>	✓	✓	✓	✓	✓
<i>Create/Edit Attachments</i>	✓	✓	✓	✓	✓
<i>Create/Edit Cases</i>	✓	✓	✓	✓	✓
<i>Create/Edit Child Parties</i>	✓	✓	✓	✓	✓
<i>Create/Edit Involved Persons</i>	✓	✓	✓	✓	✓
<i>Create/Edit Notes</i>	✓	✓	✓	✓	✓
<i>Create/Edit Own Activities</i>	✓	✓	✓	✓	✓
<i>Submit Invoices</i>	✓	✗	✗	✗	✗
<i>Submit Own Fee Requests</i>	✓	✓	✗	✗	✗
<i>View Credits</i>	✓	✓	✓	✓	✓
<i>View Invoices</i>	✓	✓	✓	✓	✓

## Your Contact, Billing, and Office Information in CARES

If you need to update your email address for invoice notifications, billing information (bank account, etc.), or anything else not yet described, please complete an OCR [Change Request form](#) online. Keep in mind, as detailed in OCR's [Billing Policies and Procedures](#), contract attorneys can only invoice from one office at a time in CARES. **If you change your [taxpayer identification number \(TIN\)](#) in the future, OCR must give you a new, separate CARES account**—in other words, TIN changes require you to close and then re-enter *all* of your case appointments and start using a new CARES login.

## What Can My OCR Staff Attorney See?

OCR staff attorneys cannot view any [attachments to a specific activity](#) or any of your attachments on the [Attachments tab](#). They cannot see any of your notes entered on the [Notes tab](#) in an appointment. They cannot see your [home screen](#), [upcoming activities](#), or [address book](#). 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](#) or as an attachment rather than in the notes box within a specific activity.

## Help and Troubleshooting

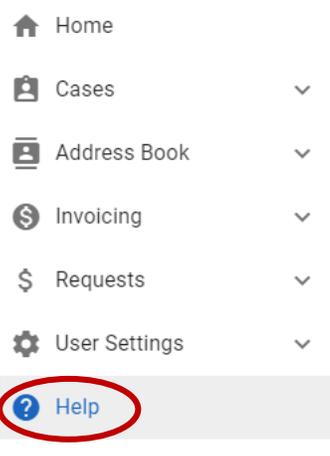
The most efficient way to learn CARES is by reading this document, including [CARES Fundamentals](#), and the information posted at <http://www.coloradochildrep.org/attorney-center/billing/>. We also recommend searching our Help articles—within CARES, click Help on the left-side navigation menu to search for directions by typing keywords in the upper right "Search Query" box, then click the magnifying glass to search existing articles.

**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.

**Remember never to access CARES via Internet Explorer or Microsoft Edge and do not work on CARES in more than one tab or window of the same web browser at the same time.** Reload CARES in one tab of [Chrome](#), [Firefox](#), or [Safari](#) instead.

If you have technical questions *after* reviewing this document and the Help articles within CARES, email Rebecca Garrison at [rebeccagarrison@coloradochildrep.org](mailto:rebeccagarrison@coloradochildrep.org). **For the fastest solution, please remember the following:**

- Describe very precisely where you got stuck in this handbook—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.
- Occasionally Rebecca may need to see a screenshot of your "console" to look for error messages in code. Please see the directions at <http://tinyurl.com/ybtbdg92> if you are asked to do so.



▲ *Help articles are available in CARES*

