

CASA OF LOS ANGELES

# Advocate Handbook

ELECTRONIC CASE FILE DOCUMENTATION AND GUIDE TO ETO® (EFFORTS TO OUTCOMES)

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# TABLE OF CONTENTS

1 \	Welcome	2	4
1.1	Abou	t CASA LA	4
1.2	2 Purp	ose of this Handbook	4
1.3	B Abou	t The ETO® Software	4
1.4	1 Conf	identiality & Security	4
2	Advocate	e Documentation	5
	Advocate	Documentation Timeline Table	5
2.1	l Begir	nning of your Case (first 30 days)	5
	2.1.1 I	Baseline Scale	5
	2.1.2 (	Goal Setting	8
2.2	2 Thro	ughout your Case: Required Monthly Documentation	9
2	2.2.1 I	Progress Notes	9
	2.2.1.1	Child Visit Log (1 per month minimum*)	9
	2.2.1.2	Case Note Log (1 per month minimum*)	10
	2.2.1.3	Monthly Goals Update (1 per Month)	11
4	2.2.2	/olunteer Hours (Monthly)	12
2.3	3 Thro	ughout your Case: Documentation to Complete as needed	13
	2.3.1 U	Jploading Case Documents	13
	2.3.2	Saving Case Contacts	14
4	2.3.3 (	Jpdating Child Placement	15
	2.3.4 I	Helpful ETO Resources for CASAs	16
	2.3.4.1	Printing out all Contacts for the Case	16
	2.3.4.2	Preparing for the CASA Court Report	17
2.4	1 End	of Case	18
2	2.4.1 (	Outcomes Scale	18
3	ETO Sof	tware System Basics	19
3.1	l Logging	in to ETO®	19
3.2	2 Logg	ing Out of ETO®	19
3.3	B ETO	® Terminology	19
3.4	1 Upda	ting My Password	20
3.5	5 ETO	® Help	20
4	Viewing	a Child on the Waitlist	21
5 1	Using E1	O	23

5.1 A look	around the Home Page	23
5.1.1 M	ly CASA Dashboard	23
5.2 Child's	s Dashboard	24
5.2.1.1	How to find a Child's Dashboard from 'My Dashboard'	24
5.2.1.2	How to find a Child's Dashboard using 'Quick Search'	24
5.2.1.3	About the Child's Dashboard	25
5.3 Collec	tion Dashboard	27
5.4 Touch	Points	29
5.4.1 R	ecording a TouchPoint for a Child from their Dashboard	29
5.4.2 R	ecording a TouchPoint for Collection (e.g. siblings)	29
5.4.3 Id	lentifiers	30
5.4.4 Sa	aving a TouchPoint	31
5.4.5 Vi	iewing or Editing previously recorded TouchPoints	32
Appendix A. C	Child Baseline and Outcome Scale Descriptions	33
Appendix B. A	Advocate Documentation Checklist	36

# 1 WELCOME

# 1.1 ABOUT CASA LA

CASA of Los Angeles strives to improve the lives of children in the dependency court system by pairing them with trained volunteer advocates. Volunteer advocates—empowered directly by the courts—offer judges the critical information they need to ensure that each child's rights and needs are being attended to while under court jurisdiction.

## **1.2 PURPOSE OF THIS HANDBOOK**

The purpose of this handbook is to support CASAs in their advocacy work as a significant part of the role is documenting monthly progress and interventions made on a case. This handbook provides guidance for documenting advocacy work and entering it into CASA/LA ETO® software. The handbook is presented in two parts including:

- a) **Advocacy Documentation guidelines**: the notes you will be providing on your case that will be entered into the child's CASA legal file.
- b) **ETO software system basics**: these will guide you through the ETO software system as you review and input information into your child's case.

# **1.3 ABOUT THE ETO® SOFTWARE**

CASA of LA's programs are documented through a web-based software called ETO®, Efforts to Outcomes. Social Solutions, the creator of Efforts to Outcomes (ETO®) software, is the leading provider of performance outcomes software for human service and is used by over 3,900 organizations.

# **1.4 CONFIDENTIALITY & SECURITY**

In accordance with the CASA Oath of Confidentiality, CASAs shall "maintain the integrity and confidentiality of all information pertaining to this matter from whatever source obtained". This includes all records and electronic files to which you have access.

ETO software is secure and meets current HUD DV, HMIS, FERPA, Social Security Administration and HIPAA data management and security protocol. The application is accessed by users via a secure HTTPS connection to the ETO software web application server.

The ETO software utilizes user name and password functionality to prevent unauthorized application access and provide an automated audit trail of that user's interaction with the software. Security is further established by role-based access control – and therefore not all users will have access to the same menus and information in ETO®. The ETO software is configured to detect user inactivity and will terminate a session after 60 minutes.

However, please consider additional duties of care:

- Password protect your phone, tablet, computer in case of theft or loss
- CASAs may not share their ETO® login information with any other parties

# 2 ADVOCATE DOCUMENTATION

Advocate documentation refers to the progress notes and records you as a CASA are **required** to create while active on a case.

#### Why is Advocate Documentation important?

- Legal File Record Keeping: CASA advocacy work and progress must be documented in the child's CASA legal file.
- **Measuring Impact**: Understanding the individual and congregate impact of CASAs on children cases.
- **Guidelines and Standards:** Ensuring quality and best practices of CASA advocacy work as per CASA national and state standards.

Required Advocate documentation has several different components: Some documentation is only completed once, like the <u>Baseline Scale</u> (Section 5.1.1) and <u>Outcomes Scale</u> (Section 5.4.1), while others like your <u>Progress Notes</u> (Section 5.2.1) (Case Note Log, Child Visit Log, Goals Update) and <u>Volunteer Hours</u> (Section 5.2.2) are required to be completed each month. The <u>Advocate Documentation Checklist</u> provides a summary of CASA's advocate documentation.

#### Advocate Documentation Timeline Table



# 2.1 BEGINNING OF YOUR CASE (FIRST 30 DAYS)

#### 2.1.1 Baseline Scale

The Baseline Scale uses the <u>Child Baseline and Outcome Scale</u> to assess risk in the areas of *Safety, Permanency* and *Well-Being (Physical Health, Mental Health, and Education)* for each child at the onset of their case. Baseline Scale ratings are informed by the information you gather during review of files, interviews, meetings, calls and other appropriate activities with the child and case parties during the first thirty (30) days of advocacy.

The Baseline Scale is only completed once and **is completed in mutual discussion with your Senior Program Coordinator** at the end of the first thirty (30) days of your appointment to a case. Your SPC will complete the TouchPoint during this discussion.

### Here is what the Baseline Scale TouchPoint looks like in ETO:

Baseline Scale for Andrew Fake on 10/3/2016	
Baseline and Outcomes Rating Scale	1
SAFETY	
High risk danger or urgent safety concerns for immediate intervention include:	
- safety risk in placement or home, or	
- safety risk in school or in immediate environment, or	
- safety risk in well being areas of physical, developmental, or mental health	
Indicate child's current level of safety: *	
O 0 Not Applicable:	
O 1 Minimal or very low risk: Injury/illness, risk of harm from self or others, shelter	
O 2 Slight or low risk: Injury/illness, risk of harm from self or others, shelter	
○3 Moderate risk:	
Injury/illness, risk of harm from self or others, shelter	
Serious, but not life threatening - injury/illness, risk of harm from self or others, shelte	er
O 5 Critical or very high risk: Life threatening - injury/illness, risk of harm from self or others, shelter	
PERMANENCY	
Level of permanency in current living situation/risk for lack of permanency.	
Indicate level of current permanency in current living situation/risk for lack of permanency:	*
O - Not Applicable:	
No areas of concern or case not yet adjudicated. NOTE: If case not adjudicated, case must be r	e-rated at time of legal plan.
O 1 - Minimal or very low risk: Plan is to remain in family or reunification imminent and likely; adult long term connections appear hi on a structure in the structure of th	ighly likely
<ul> <li>2 - Slight or low risk:</li> <li>Family unification plan is likely and low risk; plan is in adoption phase or adoptive home identified an likely.</li> </ul>	nd adoption likely; adult long term connections appear highly
O 3 - Moderate risk: Family reunification plan is possible but has moderate risk; plan is for adoption, home may or may no legal guardianship and likely or moderately likely to occur; adult long term connections appear moder     rederately likely to occur; adult long term connections appear moder     rederately likely to occur;     adult long term connections appear moder     rederately likely to occur;     adult long term connections appear moder     rederately likely to occur;     adult long term connections appear moder     rederately likely to occur;     adult long term connections appear moder     rederately likely to occur;     adult long term connections appear moder     rederately likely term connections     rederately likely term connections     rederately likely term connections     rederately likely term connections     rederately likely term     rederately likely term connections     rederately likely term     rederately likely     rederately likely     rederately likely     rederately     redera	ot be identified and adoption is moderately likely; plan is for rately likely
• 4 - High risk: Family reunification plan is at high risk; plan is for adoption, home may or may not be identified, and and highly unlikely to occur; child in long term foster care/group home care/residential care and may connections are minimal to non-existent	adoption is highly unlikely; plan is for legal guardianship or may not have had multiple placements; adults long term
5 - Critical or very high risk: Family reunification plan is at very high risk; plan is for adoption, home may or may not be identified, guardianship and very high risk and highly unlikely to occur; child in long term foster care/group hom multiple placements; short term shelter or no substantive plan; adult long term connections are non-	, and adoption is very highly unlikely; plan is for legal ne care/residential care and may or may not have had existent

(Continued on Page 7)

cation	eing/quality of life. Meeting developmental milestones in areas of physical health, mental health, and
Α	. Physical health and physical developmental milestones. *
	○ 0 - Not Applicable - No areas of concern
	○ 1 - Minimal or very low risk: Minimal injury/illness of minimal concern or very slight physical developmental delays that are being manage appropriately
	2 - Slight or low risk: Acute injury/illness or slight physical developmental delays that are being managed appropriately
	○3 - Moderate risk: Chronic injury/illness or moderate physical developmental delays that may need ongoing treatment, and/or further assessment
	$\bigcirc$ 4 - High risk: Serious, but not life threatening injury/illness or significant physical developmental delays that may need ongoing treatment, and/or further immediate assessment
	○ 5 - Critical or very high risk: Life threatening injury/illness or extreme physical developmental delays that may need urgent treat and assessment
в	Mental Health and Social/Emotional developmental milestones.
B at d	ehavioral/emotional areas that lead to healthy adjustment. Areas include: daily living, adaptability/coping, aggression, anxiety, :tention/hyperactivity issues, conduct problems, depression, functional communication, basic social skills, study skills, mental he agnosed disorders *
	O - Not Applicable: No areas of concern
	$\bigcirc$ 1 - Minimal or very low risk: Minimal adjustment issues in any of the above social/emotional health areas that are being managed appropriately and little effect on overall w being
	O 2 - Slight or low risk: Slight or low level adjustment issues in any of the above social/emotional health areas that are being managed appropriately had little effect or overall well being
	• 3 - Moderate risk: Moderate adjustment issues in any of the above social/emotional health areas that may not be managed appropriately and having moderate eff on overall well being; may need mental health or neuropsychological assessment for further treatment and/or other resources to assist in increasing functional adjustment in social/emotional areas
	O 4 - High risk: Serious but not life threatening adjustment issues in any of the above social/emotional health areas that may not be managed appropriately an having significant effect on overall well being; may have significant mental health issues/diagnosis, or developmental trauma experiences that a untreated
	○ 5 - critical or very high risk: Critical and potentially life threatening adjustment issues in any of the above social/emotional health areas that may not be managed appropria and having very significant effect on overall well being; may have significant mental health diagnosis that is untreated and may lead to harm to self or others; may be involved in treatment, but treatment has not significantly reduced symptoms; well being has not been stabilized; may be evidence of extreme social skills deficiets, communication disorder or other social/emotional delays that require immediate further assessment and/or other resources to assist in increasing functional adjustment.
C.	Education and learning developmental milestones *
	0 - Not Applicable:
	No areas of concern
	○ 1 - Minimal or very low risk: At grade level, and in appropriate educational setting with little concerns overall; may or may not have moved schools multiple times, but doing
	$\hat{\mathbf{\Theta}}_{2}$ - Slight or low risk: Slightly below grade level (less than 1 year); in appropriate educational setting or some learning delays that are affecting grade level, that are being managed appropriate or may need minimal additional resources; may or may not have moved schools multiple times, but doing fairly wel overall
	3 - Moderate risk: Moderately below grade level (more than one year); variance between cognitive ability and academic ability may indicate learning disability; may not be in appropriate educational setting or may have had moved schools multiple times which may be affecting grade level; potentially sporadi attendance or evidence of learning disability that may not be managed appropriately and may need more specific resources to assist; may not have IEP and may need educational assessment; or has IEP but has not progressed with current level of resources.
	○ 4 - High risk: Seriously below grade level (more than one year); variance between cognitive ability and academic ability may indicate learning disability; or unstable/multiple school placements may have affected grade level; or sporadic attendance or evidence of significant learning disability, that m not be managed appropriately and may need significant additional resources to manage; may not have IEP and may need educational assessme or has IEP but has not progressed with current level of resources
	○ 5 - Critical or very high risk: Significantly below grade level (more than one year); variance between cognitive ability and academic ability may indicate learning disability; or minimally attending school, unsuitable educational setting, or unstable/multiple school placements may have affected grade level; or significant learning disabilities that may not have been managed appropriately; may not have IEP and may need educational assessment; or has IEP but h not progressed with current level of resources

Please see <u>Appendix A. Child Baseline and Outcome Scale Descriptions</u> for a more detailed description of the scales used for a child's Baseline and Outcome Scale TouchPoint.

#### 2.1.2 Goal Setting

Once you and your Senior Program Coordinator (SPC) complete a Baseline Scale for a child, you will move on to establishing Advocacy Goals. The Advocacy Goals are set along with your SPC during an in-person or phone discussion and are recorded in an **Advocacy Goals TouchPoint**. These goals will be based on your understanding of the child's current needs in the areas of *Safety*, *Permanency* and *Well-Being (Physical Health, Mental Health, and Education)*.

Here is what the Advocacy	y Goals TouchPoint looks like in ETO:
---------------------------	---------------------------------------

Advocacy Goals for Fake, Andrew on 5/25/2016	Don't edit this date	e!	
Advocacy Goals			
The purpose of this TouchPoint is to set advocacy	goals for a child.		
This TouchPoint should be completed:			
• for each individual child			
• within the first 30 day of an appointment of a CA	SA		
• updated, as appropriate, in conjunction with SPC review	/CASA case		
Physical health and/or physical well being goal relev	ant?		
ONo physical well being goal is appropriate at the Clear Selection	e moment		
Well-Being - Physical Health & Physic	al Development goal(s):		
1. CASA will advocate for chil to address ongoing stomach pai	d to be seen and assesse ns reported by child.	d by a specia	alist
Markel baskbases in land and an land and a start of the s			
ONo mental health or social/emotional goal is ap	propriate at the moment		
Well-Being - Mental health & Social/E	motional developmental goal	(s):	
<ol> <li>CASA will observe child in potential factors contributing</li> <li>CASA will assess and recomm resources that address mental CSW to refer.</li> </ol>	foster home to assist in to child's aggressive h end that CSW identify ag health concerns of child	assessing pehavior in ho pe-appropriato and encourage	ome. e ge
			<i>li</i>

Note: When a Goal is accomplished or you need to add or change a goal, you and your SPC will discuss and your SPC will record a <u>new</u> **Advocacy Goals TouchPoint**. Do not edit your existing Goals!

#### 2.2 THROUGHOUT YOUR CASE: REQUIRED MONTHLY DOCUMENTATION

#### 2.2.1 Progress Notes

Your Progress Notes are an essential aspect of your Advocate Documentation. You are responsible for recording Progress Notes each month. Progress Notes are used to:

- Help you and your Senior Program Coordinator stay focused and on-track to meet your Advocacy Goals and communicate relevant case information to your SPC.
- Have your information ready to assist in writing your Court Reports
- Maintain regulatory CASA court standards for an up to date Child's CASA Legal File.

Similar to your Court Report, Progress Notes should be written in the third person.

Progress Notes are comprised of three separate TouchPoints:

- 1. Child Visit Log (1 per month minimum)
- 2. Case Note Log (1 per month minimum)
- 3. Monthly Goals Update (1 per month only)

#### 2.2.1.1 Child Visit Log (1 per month <u>minimum</u>\*)

The Child Visit Log TouchPoint is used to record notes about your monthly contact (face-toface visits and other contact) you have with your child. These notes should summarize visit activities and occurrences, crisis-issues and anything note-worthy from the visit. A new Child Visit Log must be recorded **at minimum once per month.** 

#### Here is what the Child Visit Log TouchPoint looks like in ETO:

Child Visit Log for Fake, Andrew on 7/27/2	016	Don't edit th	iis date!	
Identifier: YMCA	Use the "Identifier title. This is a grea organize and sort t	" field to give your Log a t tool to help you hrough your Log!		
Please record child visit logs by visit. Press "Save and Record Similar" if you Note: The "Notes for Court Report" lin notes, child visit logs and monthly goa <b>Uploading Documents:</b> Please uploa easily identify the document. You are	I have a few visit lo k on your child's da Ils updates into a fil d documents to a C no longer able to up	gs to record at the same shboard will download yo e that can be used to cop case Document TouchPoin pload document to this To	time. our child's last 12 months by and past into your cou at and use the Identifier f buchPoint.	s of case Int report. field to
Date of Visit: This 7/26/2016	s is the date that the act with your child <u>c</u>	e visit or <u>accurred</u> .	If you transport of placement with you child, that must be	r leave ur CASA noted!
CASA met with Andrew at the YMC program. Andrew was not happy t communicative in conversation w foster home and that he liked b fighting with the other boys in time with Ms. Santos in the resu have helped with his headaches.	A Boys and Girls o be called away ith CASA. He did eing with his br the foster home ource room each a	Club, where both boys from friends and acti- state that he continu- other. He noted that t . He confirmed that he afternoon at school, a	s attend after school ivities and was not v. led to be happy in hi chere had been some a enjoyed the one-on- and that the new glas	ery s one ses

\*Note: If you visit or contact your CASA child more than one time in a month, you will **record a separate Child Visit Log TouchPoint for each individual visit or contact**. For example, if you visit your CASA child and have a phone call the following week in the same month, you would record two Child Visit Logs that month.

#### 2.2.1.2 Case Note Log (1 per month <u>minimum</u>\*)

The Case Note Log TouchPoint is used to record notes about your calls, emails or visits with **other people** (e.g. case parties) in your child's life. Case Notes should be completed as contact is made throughout the month, and must be completed **at minimum once per month**.

Here is	s what the	e Case Note	Log	TouchPoint	looks	like in ETO:
---------	------------	-------------	-----	------------	-------	--------------

se Note Log for Fake, Andrew on	5/26/2016	<b></b>		Don't edit this o	date!	
dentifier: Pat Benatar - CSW 🧲	Use th title. T organi	e "Identifier" fi his is a great to ze and sort thro	eld to give you ool to help you ough your Log!	ır Log a		
ise Note Log						
Please record case notes by con	ntact.					
Press "Save and Record Similar	" if you have	a few notes, v	vith different o	ontacts, to do at	the same time.	
Note: The "Notes for Court Rep notes, visits, and monthly goals	ort" link on y s into a file th	our child's das nat can be used	hboard will do I to copy and	wnload your chil paste into Word.	d's last 12 months o	of cas
Uploading Documents: Please easily identify the document. Yo	e upload doc ou are no lon	uments to a Ca ger able to upl	se Document oad document	TouchPoint and t to this TouchPo	use the Identifier fie pint.	eld to
Date of contact: *	Subject of n	otes as it relat	es to the child	's advocacy goals	5:	
5/18/2016	*			, ,		
	Safety				Select all "Subie	cts"
T	Permar	nency			that the contact	was
Record the date that	Physical	d.			related to (can be	e one
the visit or contact	Mental	Health			or multiple).	
with the person	Educati	ion				
occurred.	Other					
me(s) of Contact(s):				Contact's Title(s):		
Pat Benatar				CSW	— Sample Case N	lote
rat Denatar			^ ~			
tact's role in relationship to child?						
Social worker						
Non-related caregiver						
Family						
Education						
Medical						
Mental Health						
Legal						
Probation						
Developmental Services						
es:						
poke with Anthony's CSW by phone as	round 3pm.					
	of bio moth	laddad to Conta	^			
ermanency: USW snared new address (	oi pio mother	(added to Conta	66			

\*Note: If you contact more than one case party in a month, you will **record a separate Case Note Log TouchPoint for each individual visit or contact**. For example, if you have a phone call with the Child Social Worker and a visit with a teacher in the same month, you will record two Case Note Logs for that month.

#### 2.2.1.3 Monthly Goals Update (1 per Month)

The Monthly Goals Update is **one of the most important areas of progress notes**. This TouchPoint is used to record a quick summary of what progress you have made towards your Advocacy Goals at the end of each month. **Your current goals will pre-populate into this section each month for you to easily record your progress**. Monthly Goals Updates must be recorded **once per month**.

Monthly Goals Update	for Fake, Andrew on 11/9/2016	Don't edit this date!	
Identifier: October G	als Update Use the "Identifier" field to give y title. This is a great tool to help yo organize and sort through your Log	our Log a pu g!	
Monthly Goals Update			
The purpose of characteristics.	<b>his TouchPoint is to record a monthly case sum</b> n be used for the individual participant/child or for th	mary with respect to the child's adv e collection/sibling group.	ocacy goals and case
Date of Monthly Re 10/31/2016	Goals Updates should be recorded at th each month.	e end of	
For each case g Please describe a efforts.	oal area (Safety, Permanency, Well-being) pleas	e document progress made towards goals) and responses/outcomes from th	s goal. ese
Safety Goal (popul 1. CASA will gath	ted from the child's latest Advocacy Goals Toucl r information on alleged bullying taking place in schoo	hPoint):	ample Safety Goal Update on to be taken by school staff.
Please indicate if: Safety goal is Clear Selection	ot applicable and/or there were no interventions mad	e this month	
Updat	s for <b>Safety</b> Goal(s): Please describe your advocacy	efforts and responses/outcomes from th	ese efforts. Example: "CASA has
CAS tha ask Ass beh Tea	spoke with school personnel and homeroom tea child was being bullied daily and afraid to d school staff to look into behaviors of stud stant Principal met with several students to viors and child was moved to a new classroom her reports child has been less anxious in cl	cher and determined go to school. CASA ents identified. The address the bullying last week (10/16). ass.	
Permanency Goal (	s per this child's latest Advocacy Goals TouchPo	pint): San	pple Permanency Goal Update
1. CASA with gath recommend enga decreasing AWOL	er information on child's adjustment to foster home a ement in sports and recreational activities in commur due to depressive episodes.	nd advocate for placement with sibling. ity outside of foster home to assist in c	<ol> <li>CASA will contact DCFS worker to oping skills development and</li> </ol>
Please indicate if: O Permanency g Clear Selection	<b>al</b> is not applicable and/or there were no interventior	ns made this month	
Updat <b>has d</b>	s for <b>Permanency</b> Goal(s): Please describe your adv <b>ne X which resulted in Y.</b> "	ocacy efforts and responses/outcomes	rom these efforts. Example: "CASA
CAS inf app wit rec	met with child to assist in determining chil mation about child's adjustment and placemen opriateness of placement and concerns - ensur Attorney about placement with sibling. CASA mmendations.	d's adjustment to new placement. t needs/wishes. CASA spoke with C ed child's wishes were communicat developed court report with place	CASA gathered SW about ed to CSW. Spoke ment

Here is what the Monthly Goals Update TouchPoint looks like in ETO:

#### 2.2.2 Volunteer Hours (Monthly)

The Volunteer Hours TouchPoint is used to record the number of hours and time travelled in a month spent advocating for a child. Volunteer Hours must be recorded **once per month.** 

**Note:** The Volunteer Hours TouchPoint is accessed on the <u>My CASA Dashboard</u>, <u>not</u> your Child's Dashboard.

Here is what the Volunteer Hours (Monthly) TouchPoint looks like in ETO:

Volunteer Hours (Monthly) for Casey CASA Fake on 1/5/2017	Oon't edit this date!	
Identifier: December Hours Use the "Identifier" to give your Volunteer Hours TouchPoint a title. It's best to name them the month you're recording your hours for.		
This touchpoint should be filled out once per month by each individual volunteer to co volunteering for CASA. There are tabs across to detail hours by type: advocacy, administrative, continuing ec you.	nfirm their contact details have not changed and to ucation, volunteer, jury presentations, etc. Complet	record the hours spent te those tabs relevant to
Please enter the date for the month you wish to record hours (eg, for January, en 12/31/2016	Edit this date to reflect th month you're recording hour if you're recording hours fo date should be "12	e last day of the rs for. For example, or December, this /31/2016".
Please round hours volunteered in your advocacy role to the nearest half hour.	Total Number of Hours Spent on Advocacy: Hours 15 : 00 Minutes	Total travel time: Hours 2 : 00 Minutes
Mileage you would like to record for the month: 57		
Notes: Visit with Ms. Evans (teacher) at Flora Elementary. Visit with Jose in Foster Home. Phone call with child attorney Ms. Whitman.	These notes are optional and are meant to help you account for the you record.	only hours

## 2.3 THROUGHOUT YOUR CASE: DOCUMENTATION TO COMPLETE AS NEEDED

#### 2.3.1 Uploading Case Documents

The Case Documents TouchPoint is used to upload and save case-related documents to the child's case file. Case documents may include historical case information, medical or educational records, child birth certificates and/or social security cards. The Case Documents TouchPoint is **only used as needed**.

#### Here is what the Case Documents TouchPoint looks like in ETO:

ase Documents for Fake, Andrew on 6/16/2016 🖩	
Identifier: Spring 16 Report Card	
Case Documents	
This TouchPoint can be used to upload documents for the collection o	or each individual child on the case.
Please keep in mind that the documents will remain in the touchpoint	in the order scanned and cannot be sorted.
Please follow the naming convention for all documents that are upload characters.	ded into ETO. Note: No special characters are to be used. Substitute spaces for speci
YYYY MM DD <doc description=""><child name=""></child></doc>	
Example: 2016 04 18 Status Review Camrin Fake	
This touchpoint can be used as many times as needed.	
Document	
2016 05 16 Report Card Vista Elementary.pdf × Remove     2016 05 15 IEP Vista Elementary.pdf × Remove	Note: You can upload multiple documents to a TouchPoint.
Select	

#### 2.3.2 Saving Case Contacts

The Contact for Case TouchPoint is used to record case contacts active on a case at a given time. The "All Case Contacts" Report, available on the child dashboard, compiles all Contacts you record into a single, printable address book (see <u>Printing out all Contacts for the Case for more information</u>). The Contact for Case TouchPoint is **only used as needed**.

#### Here is what the Contact for Case TouchPoint looks like on ETO:

Contact for Case for Fake, Andrew on 7/22/2016 🔠	
Identifier: Judy Brown SW	
Case Contact(s)	
<b>Note:</b> the "Identifier" field will display on the "View Chil later	lds TouchPoint" screen, so use a name that will help you find it
The purpose of this TouchPoint is to record the co	ntact information for anyone associated with the case.
This TouchPoint should be completed:	
<ul> <li>as many times as needed (e.g. attorney, social w</li> </ul>	orkers, family members, teachers, therapists, etc/)
Note: This TouchPoint can be used for the individuation of the second se	al participant/child or for the collection/sibling group. Child's Contact Log" icon near the top of the child's
Name: Judy Brown	
Judy Diown	
Title: Social Worker	
Home or Office Email	Alternate Email
ax Number  CFS Office Location: *  El Monte- SPA 3	
ddress: Country: USA Zip Code Go	
Address line1: 2218 5th Street	
City: Bell Gardens	
County: Los Angeles	
State: CA	
Zip Code:  90201	
otes:	$\sim$
	<i>A</i>
His contact no longer active?	Click here if this contact is no longer relevant or active on case
Clear Selection	List field if this contact is no longer relevant of detire of edge.

#### 2.3.3 Updating Child Placement

The Child Placement TouchPoint is used to record any changes in your child's placement. The Child Placement TouchPoint is **only used as needed.** 

Here is what the Child Placement	TouchPoint looks like in ETO
----------------------------------	------------------------------

Child Placement for Andrew Fake on	12/22/2016	
Child Placement Details		
The purpose of this TouchPor	nt is to record	J where the child/ren is placed.
<ul> <li>This TouchPoint should be con</li> <li>as many times as the child/</li> </ul>	mpleted: ren moves;	
Reminder: don't forget to upd	late the prior '	"Child Placement" TouchPoint with the date that placement
ended.		
Note: This TouchPoint can be	used for the i	ndividual participant/child or for the collection/sibling group.
Placement Type *		
Foster Home	~	
What were the reasons for the pla	cement change	?
Child Requested Move		
Relative placement		Note: You can select multiple reasons for placement
Case Closed		change.
Child Placed With Sibling Gro	up	
Finished Program	ment	
Removed From Parents		
Delinquency		
Former Placement Requested	Move	
Alleged Abuse or Neglect in F	ormer Placeme	int
Emancipation		
Other		
Contact's relationship to Chil	d:	
○ Non Family Care-Giver		
Children's Social Worke	r (CSW)	
O Supervising Children's S	Social Worke	er (SCSW)
Adoption Worker		
Attorney for Child		
Attorney for Mather		
O Attorney for Father		
County Counsel		
○ Family Member		
O Medical		
🔾 Mental Health		
OEducation		
O Developmental Services	5	
Other		
Clear Selection		
Clear Selection		
Home or Office Phone	Exter	nsion
(555) 888-8888		
Cell Phone Number	Extension	· #
(555) 777-7777		

Placement Start D 12/19/2016	ate *
Placement End Da mm/dd/yyyy	te
New Contact Ir	Iformation
Name of new prim	ary caregiver or facility name:
Mary Davis	
New Placement Ad Country: Zip Code Name: Company: Addressline1: Addressline2: City: County: State/Province: Zip/Postal Code	dress: USA Go Hirst, enter Zip Code and click "Go". Then ETO will automatically generate the County, State and Zip Code for you. Ios Angeles CA 90041
New Phone Numbe	
(323) 421-6651	
Email:	
mdavis51@gmail.	com

#### 2.3.4 Helpful ETO Resources for CASAs

#### 2.3.4.1 Printing out all Contacts for the Case

You can download all the child/case Contacts that you have entered into ETO. This file can then be printed, or saved as an electronic file to readily have on hand.

ETO <sup>™</sup> soft	ware	$\propto$			CASA LA: <u>Advocacy</u>
New Quick Search	My Favorites	My Dashboard	Reporting Dashboard	Manage Apps <sup>(NEW)</sup>	
fake	within Pa	articipant	✓ in Advocacy ✓	Search	
	_	_			
Andrew Fake's Dashbo	ard				
Reports to Download_Ad	dmin				
Notes for Court Repo	ort	_			

#### 2.3.4.2 Preparing for the CASA Court Report

The report includes the last 12 months of a child's Case Notes, Visit Logs, & Monthly Goals all in ONE FILE. This report can then be copied and pasted into WORD or printed and used as a reference when preparing your Court Report.

#### To download the report:

1. Click on the "Notes for Court Report" button at the top of the child's dashboard. Note: If you have just recently added Case Notes, Case Visits, or Monthly Goals updates, they may not appear for 15 minutes in this report.

Emma Fake's Dashboard				
Reports to Download           Notes for Court Report         1           All Case Contacts         1				

2. You will get a message that the report is opening in a new window. It will usually take you there automatically. If it does not, you will need to go to the new tab in your browser.

<b>j e e</b>			
EIOmsoftw	/are 🗙	CASA LA: <u>Advocacy</u>	W
Quick Search My Favori	tes My Dashboard		
Enter Search Term(s)	within Participant	v in CASALA(C) v Search	
2			
Your report is opening in a r	new window. If the report	does not appear, ensure that your browser did not prevent it from opening via a Pop-Up Blocker.	

- 3. To download the report, click on the "Document" drop down.
- 4. Click on "Save report to my computer as".

5	🛛 Document 🗸 🕙 🖌   🚈   🏦   🦃	(≥  100% -   H ∢ 1 /1+ ► ►
	Close	
	Save as	
	Save to my computer as	
	Save report to my computer as 4	Excel
		Excel 2007 5
	Case notes log	PDF <b>• n: 12/24/15 and 1</b>
	Case notes log	Text Ike, Andrew

- 5. Select the format you want to save the report into (e.g. Excel, PDF, etc.) We recommend either Excel or PDF to make it easier to copy and paste into your court report template.
- 6. At the bottom of your computer screen, a prompt window will appear asking if you would like to Open OR Save the document. Click on Save and NOT the arrow.

ild V	isit Log 📄 Monthly Goal Updates			6	
-	Do you want to open or save Notes for Court Report_Update	I.pdf (68.4 KB) from liveoffice.etosoftware.com?	Open Si	ave 🔻 Cancel 🔅	×

7. Click on Open and the file will open up in your selected format (in step 5).

I V	isit Log	Monthly Goal Updates		7					
	The Notes	for Court Report_Updated.xls download has c	completed.	Open	•	Open folder	View downloads	×	Di
								1	

#### Report format:

The report is separated into three sections: Case Note Log, Child Visit Log and Monthly Goals Update.



Each section of the report is organized in order of newest to oldest TouchPoints recorded for a particular child. Once you download the report, you will be able to review the TouchPoints recorded in the last 12 months for a child. From here, you will be able to copy and paste the notes you would like into your court report template.

## 2.4 END OF CASE

#### 2.4.1 Outcomes Scale

Once your case comes to an end and final progress notes and reports have been completed, you and your Senior Program Coordinator will mutually discuss and complete the Outcomes Scale TouchPoint using the <u>Child Baseline and Outcome Scale</u> to provide some closure for the case, review all your advocacy efforts that contributed to stability in the case, and assess the final outcomes with regard to *Safety, Permanency* and *Well-Being (Physical Health, Mental Health, and Education)* just as you completed at the onset of the case. Ideally, the Outcomes Scale will indicate increased stability in each of the goal areas of *Safety, Permanency* and *Well-Being.* 

Please see <u>Appendix B. Advocate Documentation Checklist</u> for an overview of the advocate documentation including how often it should occur and who is responsible for completing each TouchPoint.

# **3 ETO SOFTWARE SYSTEM BASICS**

## 3.1 LOGGING IN TO ETO®

Currently ETO software is **only supported fully** in Windows operating systems using **Internet Explorer** or on MACs, including the iPad, using the **Safari** browser. While ETO software may work in other browsers, Social Solutions does not currently support their use.

- 1. In your web address bar, type in **www.etosoftware.com** and enter your username and password.
- 2. At the ETO log in screen, type in your username, which will always be your advocatecasala.org email.
- 3. Type in your password. (Note: the very first time you log in, ETO will prompt you to reset your password. Please do this on your computer, not your phone or tablet.)
- 4. Click on "Log In"
- 5. If you forget your password, please call the ETO Help Desk to reset it. The "Forgot your password?" on the log in screen does not always work.



# 3.2 LOGGING OUT OF ETO®

ETO® will automatically time out after a period of 60 minutes inactivity. Please get into the habit of saving your work and logging out of ETO whenever you leave your computer/device unattended.

ETO™software 🛠	CASA LA: Advocacy	Welcome Eak	xe Casey CASA   Help Log Of
Quick Search My Favorites My Dashboard			
Enter Search Term(s) within Participant	n CASALA(C) V Search		
			+
			Child (Participant)
		^	► My Work
			TouchPoints

# 3.3 ETO® TERMINOLOGY

ETO® uses specific terminology. A few key terms to keep in mind and their definition:

- Participant recipients of advocacy, e.g. the child
- Entity third parties that affect the life of a child, e.g. the CASA advocate or CASA LA staff.
- **Collection** a group of participants (siblings, identified by court case number)
- **Program** a distinct area of ETO (e.g. CASA LA Programs include Waitlist and Advocacy)
- **TouchPoint** an electronic 'form' used to capture information about Participants, Collections, or Entities.

# 3.4 UPDATING MY PASSWORD

To change your password:

- 1. Click on your name next to "Welcome"
- 2. Click on "Change My Password & Security Questions"

ETO™software 🛠	CASA LA: <u>Advocacy</u>	Welcome Fak	e Casey CASA (1)elp   Log Off
Quick Search My Favorites My Dashboard			
Enter Search Term(s) within Participant V in CA	SALA(C) V Search		
			+
My Account			<ul> <li>Child (Participant)</li> </ul>
		<u> </u>	My Work
			▶ TouchPoints
<ul> <li>Manage Personal Settings</li> </ul>			
Manage My Account			
<ul> <li>Change My Password &amp; Security Questions (2)</li> </ul>			
Live Office Account Info			

- 3. Enter your "Current Password"
- 4. Enter a "New Password" that only you know (and remember to save it in a secure place for future reference)
- 5. Enter your new password again in the "Confirm Password" field
- 6. Select three "Challenge Questions" and enter their corresponding responses next to each question.
- 7. Click on "Save" and you are all set!

Manage Security Settings	
Passwords	3
* Current Password: (3)	
New Password:	
Confirm Password: 5	
Challenge Questions	
*	
What was your childhood nickname?	
*	
What was your childhood nickname?	
What was your childhood nickname?	
Make the current site my default site when I log in.	-
(* = Required)	
	Back Save

# 3.5 ETO® HELP

If you get stuck or need assistance:

- Skim the table of contents of this manual to see if it is covered
- **Call** your Senior Program Coordinator ... and catch up on other things too!
- Call or email the ETO Help Desk: (323) 859-2888 x6354 or ETOHelp@casala.org

# 4 VIEWING A CHILD ON THE WAITLIST

One of the first things you will do as a CASA is review a new case for potential match.

#### To switch to the Waitlist program:

1. Select "Waitlist" and click on "Go" from the drop down menu in the center top of ETO. You will then have access to the child in the Waitlist.

File Edit View Feverites Tools Help	P - ⊕ 0 Ø IACKA ×	G A (1)
ETO‴software 🛠	CASA LA: Materia	Welcome Fake Casey CASA   Help   Log Off
Quick Search My Favorites My Dashboard		

Note: Don't forget to select "Advocacy" and click on "Go" to get back to the Advocacy program where your assigned children are found.

Confirm that you are in the Waitlist program by looking to see that it looks like the image below. From here, you will be able to see the child's name whose case you are to review.

ETO‴software  🛠			CASA LA: Waitlist	Welcome	
Quick Search My Favorites My Dashboard					
Enter Search Term(s) within Participant V in CASA LA	(C) 🗸 🔤 Se	earch			
	_	_			
				Edit Dashboard	
Waitlist Security Message					
A CASA volunteer who is not yet officially appointed to a c supervision of their assigned SPC/PC.	ase is perr	nitted to rev	view a participant record for pot	tential match, under the	
Non-appointed CASA volunteers are <b>expressly prohibite</b> participant information.	<mark>d</mark> from prir	iting, copyir	ng, downloading/saving, sharing	g, and/or otherwise using	
Such use is strictly prohibited and is in violation of CASA L	A's privac	y policy.			
Dashboard Search	Who o	an I see in E	T0?	±-0	
Q Dashboard Search	Mho can I see in ETO?				
Dasnboard Search:	Part	icipant	Caseworker Relationship	Start Date	
	Johr	Fake 2	Viewing for Potential Match	12/22/2016	

#### To begin reviewing the child:

1. On your Waitlist Program Dashboard (pictured below), you will see that you have access to a child and that you are "Viewing for Potential Match". Clicking on the child's name will take you to that child's Dashboard.

ETO™software 🛠		ASA LA: Waitlist	Welcome					
Quick Search My Favorites My Dashboard								
Enter Search Term(s) within Participant V in CASA LA (C) V Search								
			Edit Dashboard					
Waitlist Security Message								
A CASA volunteer who is not yet officially appointed to a case is permitted to review a participant record for potential match, under the supervision of their assigned SPC/PC. Non-appointed CASA volunteers are <b>expressly prohibited</b> from printing, copying, downloading/saving, sharing, and/or otherwise using participant information.								
Dashboard Search 비교	Who can I see in ETO?		± =0					
🔍 Dashboard Search	🔹 🏠 Who can I see	in ETO?						
Dachboard Search								
	Participant	Caseworker Relationship	Start Date					
	John Fake	Viewing for Potential Match	12/22/2016					

Step 2: Once on the child's Dashboard, you have access to view their full case file. Click on "View Child TouchPoints" to review their case information via the Referral, Initial Case Assessment and Case Documents TouchPoints.

ETO™software 🛠		CA	SA LA: Waitlist				Welcome
Quick Search         My Favorites         My Dashboard           Enter Search Term(s)         within         Participant         In         CASA LA (C)	✓ Search						
John Fake's Dashboard Waitlist Security Message A CASA volunteer who is not yet officially appointed to a case SPC/PC. Non-appointed CASA volunteers are <b>expressly prohibited</b> for Such use is strictly prohibited and is in violation of CASA LA's	e is permitted to rev rom printing, copyin s privacy policy.	iew a participant re g, downloading/sav	cord for potent ring, sharing, a	ial match, unde nd/or otherwise	er the supervis e using particip	ion of their assigned	
Participant Information	Caseworkers	e's Caseworkers					±-0
Case Number: 13139 DOB: 12/10/2013 Age: 3 years	Take Action	<b>Staff</b> Fake Casey CAS	Start I A 12/22/	Date End D 2016 Pendi	<b>ate C</b> a ng Vie	<b>seworker Relationship</b> wing for Potential Match	
Collection (i.e. sibling set) Dashboard link, as applicable	Referral for CASA	or CASA					±=0
CK099999	Take Action	Date Date Last referra Updated receive by CASA	Safety I reason(s) d for the I? referral	Permanency reason(s) for eferral [minor]	Permanency reason(s) for referral [non- minor]	Well-Being reason(s) referral	for
View ALL Child Touchpoints	۲	8/2/2016		Early Intervention, age 0-5		Emotional/behavioral h significant needs Developmen significant needs	nealth tal
Initial Case Assessment and Summary Social Solutions © 2001-2016 Developed by Social Solutions, Inc.							±=0

# 5 USING ETO

# 5.1 A LOOK AROUND THE HOME PAGE

#### 5.1.1 My CASA Dashboard

Almost everything you need to do in ETO will launch from a Dashboard.

In information technology, a Dashboard is a user interface that organizes and presents information in a way that is easy to read. A Dashboard does not tell us *everything*, but it gives us a summary of key information.

The page you see when logging into ETO is known as "My Dashboard". This is your home page that provides an overview of the child(ren) you are advocating for and much more.

Your Dashboard or Home Page is made up of five primary parts:

- 1. Quick Tabs
  - a. Quick Search allows you search for a child by entering their first and/or last name.
  - b. My Favorites You may ignore it.
  - c. My Dashboard This page provides a current summary of key information pertaining to your role in ETO including the child(ren) you are currently matched to in ETO and an overview of the most recent TouchPoints you have completed in ETO.
- 2. **Navigation Dashboard** allows you to search for a child and view an existing or record a new TouchPoint for the child or yourself.
  - a. Child (Participants) –works just like the quick search function.
  - b. My Work click on "My Dashboard" to go back to your home page.
  - c. TouchPoints record a new TouchPoint or view previously recorded TouchPoints for a child or yourself.
- 3. View Child/Collection TouchPoints –view all TouchPoints recorded for a child or a collection of children.
- 4. **My Caseload** an overview of the child(ren) assigned to you.
- 5. Close side navigation bar click on the arrow to close the navigation bar and extend your view of the page you are on.

ETO™software 🛠	CASA LA: /	Advocacy	Welca	me <u>Fak</u>	ke Casey CASA   Help   Log Off
Quick Search My Favorites My Dashboard					
Enter Search Term(s) within Participant v in CASA LA (C) v Search					2
					•
				^	Child (Participant)     Find Child
					▼ My Work
	March and and				My Dashboard
	My Caseload	-	)E E	2	TouchPoints
View Child/Collection TouchPoints 3	My Caseload	4			Record TouchPoints
0		-		5	View Collections TouchPoints
View Child TouchPoints					View Child TouchPoints
View Collections TouchPoints	Participant	Caseworker Relationship	Start Date		•
	Andrew Fake	Providing Advocacy	6/5/2015		
	John Fake	Providing Advocacy	10/28/2016		

## 5.2 CHILD'S DASHBOARD

Most of your advocacy work for a child can be done from the child's dashboard. There are a few ways to get to a child's Dashboard. Either from My Dashboard, the Quick Search Bar, or another way is to use the Navigation Pane.

#### 5.2.1.1 How to find a Child's Dashboard from 'My Dashboard'

From 'My Dashboard' simply click on the hyperlink for the name of the child you wish to see:

ETO <sup>™</sup> software 🛠	CASA	LA: <u>Advocacy</u>	w	elcome Fal	ke Casey CASA   Help   Log Off
Quick Search         My Favorites         My Dashboard           Enter Search Term(s)         within         Participant         v         in         CASA LA (C)         v	Search				*
				^	Child (Participant)     My Work     TouchPoints
View Child/Collection TouchPoints	My Caseload	load	ŧ	0-1	,
View Collections TouchPoints	Participant	Caseworker Relationship	Start Date		
	Andrew Fake	Providing Advocacy	6/5/2015		
	John Fake	Providing Advocacy	10/28/2016		
	Laura Fake	Providing Advocacy	6/5/2015		

5.2.1.2 How to find a Child's Dashboard using 'Quick Search'

- 1. Click on the 'Quick Search' tab
- 2. Type in the last name (or part of the last name) of the child
- 3. Check that the table you wish to search 'within' is 'Participant'
- 4. Check that the scope of the search is selected for the appropriate Program
- 5. Click 'Search'

ETA ** software 🐔	CASA LA:Advocacy	Welcome Fake Casey CASA   Help   Log Off
Quick Search My Favorites My Dashboard		
2 3	4 Search	
	-	Child/Participant  My Work  TouchPoints

ETO will return children that are a match and that **only you** are currently advocating for (these children also show up under "My Caseload" on your dashboard.)

To view the child's dashboard:

1. Click on the specific child's dashboard you wish to view

	Quick S	earch My Favorites	M	y Dashboard									
f	ike		withir	Participant		✓ in CASA	ALA (	) V Search					
Ĩ													
	Ouick S	earch Results											Child (Participant)
Ľ	201011.0												▶ My Work
L	Matche	s for: fake											▶ TouchPoints
	Total P	articipants: 3											
		Filtered by											
	- A - 1	.ast Name											
L	[	Participant Name	T	CaseNumber	T	DOB	T	Minors Court Case Number	T	NMD Court Case Number	SiteEnrollment	T	L
		🕑 Fake, Andrew		12754		6/27/1994		CK099999			Currently enrolled in sit	e	
		Fake, John		13139		12/10/201	3	CS12345			Currently enrolled in sit	e	
		Sake Lours		10752		2/1/2014		EAKE000000			Currently oprolled in eit		

2. Click on "View [child's name] Dashboard"

ETO™software 🛠	CASA LA: <u>Advocacy</u>	Welcome Fak	ke Casey CASA   Help   Log Off
Quick Search My Favorites My Dashboard			
fake within Participant	v in CASALA(C) v Search		
1			► Child (Participant)
View Child		^	▶ My Work
Audit Report Program History Status: Currently Enrolled	View Andrew Fake's Dashboard		▶ TouchPoints

#### 5.2.1.3 About the Child's Dashboard

The child's dashboard provides a summary of the most recent information recorded for the child. It is made up of several sections that provides a CASA an overview of the child's case and helps guide a CASAs work in ETO.

5.2.1.3.1 Dashboard Terminology

On the child's dashboard there are a few key terms to keep in mind and their definition:

- **Collection** a group of participants (siblings, identified by court case number).
- Caseworker entities who are assigned to the child in ETO including an SPC, CASA and/or Peer Coordinator.

#### 5.2.1.3.2 Child Dashboard Parts

A child's dashboard consists of various parts organized by the type of information they contain:

- 1. Child's name
- 2. **Reports to Download -** you can download and print to help with preparing your
  - a. Court Report helps with preparing court report
  - b. Case Contacts includes active contacts recorded in ETO
- 3. **Record New Child TouchPoint -** quickly record a new TouchPoint for the child by clicking on any of the boxes

Laura Fake's Dashboard 1
Reports to Download 2
Notes for Court Report All Case Contacts
Record New Child TouchPoints       3         + Case Documents       + Child Visit Log       + Case Note Log       + Monthly Goals Update       + Child Placement       + Contact(s) for Child

- 4. **Participant Info –** includes picture of child and some demographics
- 5. **Caseworkers** includes individuals who have access to the child in ETO (e.g. CASA, SPC and/or Peer Coordinator)
- 6. Record or View Child's TouchPoints
  - a. "Record TouchPoints" record a new TouchPoint for the child
  - b. "View Child TouchPoints" provide a summative overview of all TouchPoints ever recorded for the child

7. Collection (i.e. sibling set) Dashboard link, as applicable – If child is part of a sibling court case they will be assigned to a "Collection" in ETO. Click on the link to go to the Collections dashboard.

Participant Info	Casoworkors 5					al -10
Participant Info	Laura Fake	's Caseworkers				220
all	Take Action	Staff	Start Date	End Date	Caseworker Relationshi	p
		Fake Casey CASA	6/5/2015	Pending	Providing Advocacy	
Be. Artestiful		Fake Polly Peer-Coordinator	6/6/2015	Pending	Providing Advocacy	
		Fake Sally SPC	6/5/2015	Pending	Providing Advocacy	
Case Number: 12753 DOB: 2/1/2014 Age: 2 years View/Edit.child	Collection (i.e. sibling	ı set) Dashboard link, as applicable i.e. sibling set) Dashboard linl Co	k, as applicable llection Name CK099999 fake9999	2		1 ⊐ 10
Record or View Child's TouchPoints 6						
Record or View Child's TouchPoints Record TouchPoints View Child TouchPoints						

8. Recent Monthly Goals Updates (TO BE COMPLETED MONTHLY) – list the most recent Monthly Goals Updates TouchPoints recorded for the child.

Re	ecent Monthly Goa	ls Updates (TC onthly Goals	) BE COMPLET	ED MONTHLY) BE COMPLET	red Monthly)			OFF
	Take Action	Date Last Updated	Date of Monthly Report:	Updates for Safety Goal (s):	Updates for Permanency Goal(s):	Updates for Well-being goal(s) pertaining to physical health:	Updates for Well-being goal(s) pertaining to mental health:	Updates for Well- Being Education & Learning goal(s):
	● / + 前	6/27/2016	7/31/2016		Spoke with the attorney and he stated Laura is on track for adoption		Spoke to Laura and she seems to understand her behavior is wrong.	
	• 🖌 🕇 🏛	6/24/2016	6/30/2016		Spoke with attorney and she stated Laura is on track to be adopted		Spoke with Laura and got her to understand she needs to behave	

9. Recent Child Visit Logs (TO BE COMPLETED MONTHLY) – list the most recent Child Visit Log TouchPoints recorded for the child.

R	Recent Child Visit Logs (TO BE COMPLETED MONTHLY)											
	Recent Child Visit Logs (TO BE COMPLETED MONTHLY) 9											
			_									
	Take Action	Date Last Updated	Identifier	Date of Visit:	Notes from Visit:							
	👁 🖋 🕇 🗎	8/26/2016	Safiah Visits Andrew & Laura at foster home	8/26/2016	I visited Andrew & Laura today at their foster home. Would include detailed notes here~Safiah Afify							

10. Recent Case Note Logs (TO BE COMPLETED MONTHLY) – list the most recent Case Note Log TouchPoints recorded for the child.

R	ecent Case Note L	ogs (TO BE (	COMPLETED M	ONTHLY)							
	Recent Case Note Logs (TO BE COMPLETED MONTHLY) 0										
	Take Action	Collection	Date Last Updated	Date of contact:	Subject of notes as it relates to the child's advocacy goals:	Name(s) of Contact(s):	Notes:				
Ľ	坐 🖋 🕇 🛱		11/28/2016	11/28/2016	Education	Sara Smith	Spoke with Sara Smith regarding upcoming IEP will be there on Dec. 2				

11. **Recent Case Documents** – list the most recent Case Document TouchPoints completed for the child. Uploaded documents are displayed as a hyperlink and may be clicked on to view the document.

Recent Case Documents										
👔 Recent Case Documents 🚳										
Ŀ										
	Take Action	Collection	Date Last Updated	Identifier	Document					
	👁 🖋 🕇 🖻		6/30/2016	DQR 6/30/2016	Copy of Advocacy Data Quality Report.xls					
	👁 🖋 🕇 🖻		6/27/2016	Progress Report 6/16/2016	ChatLog New Grads 6 16 3 00 4 30 2016 06 16 16 21.rtf					

12. **Recent Hearings –** list the most recent Hearings TouchPoints and displays information about the hearing. Uploaded documents are displayed as a hyperlink and may be clicked on to view the document.

Rece	nt Hearings	earings 1							1
	Take Action	Collection	Court Room Number/Department	Hearing Date	Hearing Type	Hearing Status	Upload Minute Order	Upload CASA Court Report	Upload Children's Social Worker Report:
	● 🖌 <b>+</b> 🗎	<u>CK0999999</u>	9038	11/4/2016	File Petition (300)	Held/Completed	ETO Formulas.docx Hands-On 1-9 JVallejo.pdf 2016 10 3 progress card Savanna Cropper.pdf	2016 10 12 Huddle rev.docx 2016 10 3 progress card Savanna Cropper.pdf	ZOHO Help Desk Tickets 6.6.16.xls Hands-On 10 JVallejo.pdf

13. **Recent Contacts –** list the most recent Contacts for Case TouchPoints and displays contact information about the contacts.

R	ecent Contacts						±.				
Recent Contacts 1											
1	<u> </u>										
	Take Action	Date Last Updated	Name:	Contact's relationship to Child:	Home or Office Phone Number	Home or Office Email	Is this contact no longer active?				
Ľ	۵ 🖌 🕇 🕲	7/15/2016	BuddyHolly	Children's Social Worker (CSW)	(213) 855-1000	BHolly@records.com					
	۵ 🖌 👈	10/18/2016	Frodo Baggins	Children's Social Worker (CSW)	(323) 555-1212		Yes, but I'd like to keep it on file for reference				

 Recent Child Placements – list the most recent Child Placement TouchPoints and displays contact information for the placement. It also provides the start and ends dates for each placement.

,	Recent Child Placer	nents hild Placeme	ents 14							1 = C
	Da Take Action Collection Up		Date Last Updated	Placement Type	What were the reasons for the placement change?	Placement Start Date	Placement End Date	Name of new primary caregiver or facility name:	New Phone Number	Email:
	👁 🖋 🕇 🗎		6/22/2016	SILP	Relative placement	3/28/2016		Vista Del Mar		

15. Recent TouchPoints - list the most recent TouchPoints recorded for the child.

Recent	Recent TouchPoints										
Ê	Laura Fake's Recent To										
<u> </u>											
	Take Action	TouchPoint	Collection	Date Last Updated	Identifier						
	👁 🌶 🕇 🛍	Case Note Log		11/28/2016							
	🔿 🖌 🕇 🟛	Case Note Log		11/27/2016							

# 5.3 COLLECTION DASHBOARD

A collection dashboard provides a summary of the most recent information recorded for the collection. It is composed of several sections that helps a CASA obtain an overview of the collection's case and to help guide a CASAs work in ETO. The layout of this dashboard is very similar to an individual child's dashboard.

Remember that a collection is a group of participants (siblings, identified by court case number).

A collection's dashboard consists of various parts organized by the type of information they contain:

- 1. Collection's name
- 2. **Collection Information –** provides the court case number for the collection/sibling set and the number of members in the collection/sibling case.
- 3. **Collection Members** provides the names of the children in the collection/sibling set. Their names are hyperlinked and you may click on them to go to the individual child's dashboard.

CK099999's Dashboard 1	
Collection Information 2	Collection Members 3
Sourt Case Number Information	Court Case Number Members
Court Case Number Name: CK099999	Name
Number of members: 3	Fake, Andrew
A 🖉 🗇 🏛	Fake, John
	Fake, Laura

- 4. **Recent Hearings** list the most recent Hearings TouchPoints recorded for the collection and displays information about the hearing. Uploaded documents are displayed as a hyperlink and may be clicked on to view the document.
- 5. **Recent Child Visit Logs –** list the most recent Child Visit Log TouchPoints recorded for the collection.
- 6. **New –** click on this to record a new TouchPoint. If you click on this in the Recent Child Visit Logs section, a blank Child Visit Log TouchPoint will open.

	-									
Recent Hearings	4									± =0
Recent Hearings										
Take Action	Collection Status	Date Last Updated	Recorded By	Identifier	Court Room Number/Depart	n ment	Hearing Date	Hearing Type	Hearing Status	Upload Results of Hearing sheet:
۲	<u>CK099999</u>	11/4/2016	Jessica Vallejo	Testing 1	9038		11/4/2016	File Petition (300)	Held/Completed	
Recent Child Visit Logs 5										
Recent C	hild Visit Logs									
Take Action	Collection Name	Date Completed	Recorded By	I	dentifier	Date of Visit:			Notes from Visit:	
• 🖌 🕇	<u>CK099999</u>	8/26/2016	Fake Casey CASA	Safiah Visits fo:	Andrew & Laura at ster home	8/26/2016	I visite	d Andrew & Laur detailed	a today at their fos 1 notes here~Sai	ster home. Would include fiah Afify
• 🌶 🕇	<u>CK099999</u>	7/18/2016	Fake Casey CASA	Sibling Visit		7/5/2016			test for collection	
® / +	<u>CK099999</u>	7/18/2016	Fake Casey CASA	Andrew, Laura 7		7/18/2016	(test) here is where I put my notes about my visit with Laura. It was successful.		v visit with both Andrew and sful.	
					+ <u>New</u>	6				

- 7. **Recent Case Note Logs –** list the most recent Case Note Log TouchPoints recorded for the collection.
- 8. **New –** click on this to record a new TouchPoint. If you click on this in the Recent Case Note Logs section, a blank Case Note Log TouchPoint will open.
- 9. **Recent TouchPoints –** list the most recent TouchPoints recorded for the collection.

cent Case Note I	Logs 7									1	ا ا
Recent C	ase Note Lo	gs									
Take Action	Collection	Date Completed	Recorded By	Identifier	Date of contact:	Name(s) of Contact (s):	Contact's Tit (s):	le	Notes		
• 🖋 🕇	<u>CK0999999</u>	7/18/2016	Fake Casey CASA	7/18/16 Jill Cady	7/18/2016	Peter Gabriel	musician	Fake note	es. Lots of fake no notes	ites. Court report fal	<e< td=""></e<>
• 🖋 🕇	<u>CK099999</u>	3/28/2016	Fake Casey CASA	Case Note 3/28/16	3/23/2016	Pat Benatar	CSCW				
• / +	<u>CK099999</u>	7/20/2015	Fake Casey CASA		7/6/2015	Andrew Fake			I was th	ere	
					<b>+</b> <u>Ne</u>	<u>w</u> 8					
ent TouchPoint	s									2	1
CK099999's Recent TouchPoints 💿											
Take Action	TouchPoint	Dashboard Co	ollection Program	Name Subject Type	Status Comp	ate Date Last Dieted Updated	Audit Creation Date	Recorded By	Attributed Staff Name	Identifier	
۲	Hearings	Cl	K099999 Advocacy	y Participant	11/4/	/2016 11/4/2016	11/4/2016	Jessica Valleio		Testing 1	

## 5.4 TOUCHPOINTS

TouchPoints are an 'electronic form' used to capture information about children, either individually, or as a Collection.

#### 5.4.1 Recording a TouchPoint for a Child from their Dashboard

To record a TouchPoint for a child, you may do that from the buttons located at the top of a child's dashboard as seen below. Just click on the button of the TouchPoint you would like to record. To get more step-by-step instruction on completing these TouchPoints please refer to section <u>5.2 THROUGHOUT YOUR CASE: DOCUMENTATION TO COMPLETE MONTHLY</u>

Laura Fake's Dashboard	
Reports to Download	
Image: Notes for Court Report         Image: All Case Contacts	
Record New Child TouchPoints + Child Visit Log + Case Note Log + Monthly Goals Undate + Child Placement + Contact(s) for Child	
T case bocuments T child visit by T case note by T wonthing Goals opdate T child Platement T contact(s) for child	

#### 5.4.2 Recording a TouchPoint for Collection (e.g. siblings)

Recording a TouchPoint for a collection, a sibling set identified by court case number, makes it easier to record the **same information** once for a ground of children rather than having to record a TouchPoint for each child.

Begin from any one of the collection member's/child's dashboard:

 Scroll down, below "Participant Information", in the "Collection (i.e. sibling set) Dashboard link, as applicable" section, click on the collection name.

Collection (i.e. sibling set) Dashboard link, as applicable	±⊐Ø
Collection (i.e. sibling set) Dashboard link, as applic	able
Collection Name CK099999	

- Click on "New" to record a new TouchPoint. Each section of the dashboard displays this text at the bottom of the section. Click on "New" on the section (e.g. Case Note Log, Child Visit Log or Recent TouchPoint) for which you want to record a TouchPoint.
- If you click on "New" in the "Recent TouchPoints" section, you will be asked to select the type of TouchPoint you want to record. Select the type of TouchPoint you want to record and a window will appear with a blank version of the TouchPoint you selected.

Take TouchPoint For CH	0999999 [Court Case Number]
Select TouchPoint:	- Select a TouchPoint - Case Documents Case Note Log Child Visit Log Contact for Case

+ <u>New</u>

4. On the left side of the TouchPoint you will see the names of the children that form part of the collection. If you would like to remove a child from that list, click on the x next to their name.

Fake, Andrew O Fake, James O Fake, Laur	Case Visits Document upload (as needed): Select	
Add	Sist notes for the Month of May 2015	

- 5. You will be asked to confirm the deletion of this member from this TouchPoint recording.
- 6. Confirm that the selected child was removed by confirming that their name no longer appears on the list located to the left of the TouchPoint.



#### 5.4.3 Identifiers

Most TouchPoints include an "Identifier" field – which is available for you to put in a meaningful reference for an individual TouchPoint.

Case Note Log for Andrew Fake on 12/23/2016	×
Identifier:	
Case Note Log	

Identifiers are helpful especially as you begin to consistently record TouchPoints for your child and you need to locate a particular TouchPoint in a long list of TouchPoints. You will appreciate the use of the identifier field when searching on a child's dashboard as seen below.

Rece	Recent Child Visit Logs (TO BE COMPLETED MONTHLY)								
	Recent Child Visit Logs (TO BE COMPLETED MONTHLY)								
8									
	Take Action	Date Last Updated	Identifier	Date of Visit:	Notes from Visit:				
	• 🖌 🕇 🛍	8/26/2016	Safiah Visits Andrew & Laura at foster home	8/26/2016	I visited Andrew & Laura today at their foster home. Would inclu here~Safiah Afify				
	👁 🤌 🕇 🛍	7/18/2016	Sibling Visit	7/5/2016	test for collection				
	• 💉 🕇 🛍	7/18/2016	Andrew, Laura	7/18/2016	(test) here is where I put my notes about my visit with both Andre successful.				
	👁 🤌 🕇 🛍	7/18/2016	Laura	7/18/2016	test entry for visit with laura				
	👁 🖋 🕇 🛍	7/17/2016	July visits	7/17/2016	Andrew and Laura went for ice cream.				

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It will also come in handy when you want to see ALL TouchPoints ever recorded for your child via the "View Child TouchPoints" link on the child's dashboard. To do this:

- 1. Click on "View Child TouchPoints" on your child's dashboard.
- A page opens that list all TouchPoints recorded for the child organized by type of TouchPoint. Expand the list of recorded TouchPoints you are interested in reviewing by click on the plus (+) next to header row.
- 3. You can search for any TouchPoint using the "Identifier" field or by typing in text in the search box located at the top of the column.

-				
6	Record or	View C	hild's Tou	IchPoints
0				
Record	TouchPoints			
View C	hild TouchPoin	ts 🚺		

	view TouchPoints for <u>Fake, Laura</u>							
TouchPoint	TouchPoint Name							
T								
Advocacy Go	Advocacy Goals <u>Take New</u>							
Case Docum	Case Documents Take New							
Date Comple	Date Completed 🚽 Last Updated 🛛 🚺 Identifier							
	T	T	3					
6/30/2016	6/30	0/2016	DQR 6/30/2016					
6/27/2016	6/27	7/2016	Progress Report 6/16/20	16				
	6/24	4/2016	Picture of Mom and Dad					
6/24/2016	0/2	1/2020						
6/24/2016 6/23/2016	6/2	3/2016	Picture					

#### 5.4.4 Saving a TouchPoint

Every TouchPoint must be SAVED. You will lose all information if you do not save. In order to save you must scroll to the bottom of the TouchPoint and click SAVE.

TouchPoint in order to save		
^	1	
<u>_</u>		
#		
	L	

You will know you saved successfully when the TouchPoint submission confirmation appears. You must wait for this window (to the right) to appear or you may risk the chance of losing your work. Once this window appear, click "OK". You will be redirected to the page you were prior to working on the TouchPoint.

Succes	S	
i	Your TouchPoint was SUBMITTED.	
	ОК	

#### 5.4.5 Viewing or Editing previously recorded TouchPoints

You can view or edit TouchPoints in a couple of ways.

1. Update a recent TouchPoint recorded for a participant from their Dashboard. Note the "Take Action" icons next to each TouchPoint. Select the appropriate icon (*View (eye), Edit (pencil) or Add (plus) icon.*):

tecent TouchPoints								
Andrew Fake's Recent TouchPoints								
Take Action	TouchPoint	Collection	Program	Name	Date Completed	Date Last Update		
۰ 🖌	Case Note Log	fake000000	Advocacy	Fake, Andrew	6/10/2015	6/10/2015		
( ) / + )	Case Visit Log	<u>fake000000</u>	Advocacy	Fake, Andrew	6/10/2015	6/10/2015		
© # +	Case Visit Log	fake000000	Advocacy	Fake, Andrew	6/10/2015	6/10/2015		
• 🖋 +	Case Visit Log		Advocacy	Fake, Andrew	6/10/2015	6/10/2015		
• 🖋 +	Case Visit Log		Advocacy	Fake, Andrew	6/10/2015	6/10/2015		

2. If you do not see a TouchPoint that you would like to review or update on a child's dashboard, then click on "View Child TouchPoints" on the child's dashboard.



3. Under the "Take Action" column, click on the appropriate icon.

Review TouchPoint	ts						
<b>Review TouchPoint</b>	s for <u>Fake, Laur</u> a	<u>a</u>					
TouchPoint Name							
T	1						
Advocacy Goals	ake New						
	Take New						
Case Note Log Ta	ike New						
Date Completed 👻	Last Updated	Identifier	Collection	Program	Staff	Status	Take Action
T	T	T	T	T	No Filter 💌	T	
11/28/2016	11/28/2016			Advocacy	Fake Casey CASA		۲ ک
11/27/2016	11/27/2016			Advocacy	Fake Casey CASA		،
10/6/2016	10/27/2016	arranged sibling visit		Advocacy	Fake Casey CASA		۲ ک

# APPENDIX A. CHILD BASELINE AND OUTCOME SCALE DESCRIPTIONS

NOT APPLICABLE	MINIMAL OR VERY LOW RISK	SLIGHT OR LOW RISK	MODERATE RISK	HIGH RISK	CRITICAL OR VERY HIGH RISK
Safety					
Non applicable- no areas of concern	Minimal/very low risk: injury/illness, risk of harm from/to self or others, shelter.	Slight/low risk: injury/illness, risk of harm from/to self or others, shelter.	Moderate risk: injury/illness, risk of harm from/to self or others, shelter.	Serious but not life threatening: injury/illness, risk of harm from/to self or others, shelter.	Life threatening: injury/illness, risk of harm from/to self or others, shelter.
Permanency					
Not applicable – no areas of concern or case not yet adjudicated.	Plan is to remain in family or reunification imminent and likely. Adult long term connections appear highly likely.	Family reunification plan is likely and low risk. Plan is in adoption phase/ adoptive home identified and adoption likely and low risk. Adult long term connections appear highly likely.	Family reunification plan is possible but has moderate risk. Plan is for adoption, home may or may not be identified, and adoption is moderately likely. Plan is for legal guardianship and likely or moderately likely to occur. Adult long term connections appear moderately likely.	Family reunification plan is at high risk. Plan is for adoption, home may or may not be identified, and adoption is highly unlikely. Plan is for legal guardianship and highly unlikely to occur. Child in long term foster care/group home care/residential care and may or may not have had multiple placements. Adult long term connections are minimal to non-existent.	Family reunification plan is at very high risk. Plan is for adoption, home may or may not be identified, and adoption is very highly unlikely. Plan is for legal guardianship and very high risk and highly unlikely to occur. Child in long term foster care/group home care/residential care and may or may not have had multiple placements. Short term shelter or no substantive plan. Adult long term connections are non-existent.
Well-Being: P	Physical Health	-			·

Non applicable – no areas of concern	Minimal injury/illness of minimal concern or very slight physical developmental delays that are being managed appropriately	Acute injury/illness or slight physical developmental delays that are being managed appropriately.	Chronic injury/illness or moderate physical developmental delays that may need ongoing treatment, and/or further assessment	Serious but not life threatening injury/illness or significant physical developmental delays that may need ongoing treatment, and/or further immediate assessment	Life threatening injury/illness or extreme physical developmental delays that may need urgent treatment and assessment.		
Well-Being: Mental Health							
Non applicable – no areas of concern	Minimal adjustment issues in any of the above social/emotional health areas that are being managed appropriately and little effect on overall well- being.	Slight or low level adjustment issues in any of the above social/emotional health areas that are being managed appropriately and have little effect on overall well -being.	Moderate adjustment issues in any of the above social/emotional health areas that may not be managed appropriately and having moderate effect on overall well- being. May need mental health or neuropsychological assessment for further treatment and/or other resources to assist in increasing functional adjustment in social/emotional areas	Serious but not life threatening adjustment issues in any of the above social/emotional health areas that may not be managed appropriately and having significant effect on overall well- being. May have significant mental health issues/diagnosis, or developmental trauma experiences that are untreated.	Critical and potentially life threatening adjustment issues in any of the above social/emotional health areas that may not be managed appropriately and having very significant effect on overall well- being. May have significant mental health diagnosis that is untreated and may lead to harm to self or others. May be involved in treatment, but treatment has not significantly reduced symptoms. Well- being has not been stabilized. May be evidence of extreme social skills deficits, communication disorder or other social/emotional delays that require immediate further assessment and/or other resources to assist in increasing functional adjustment.		
Well-Being: Education							

# CASA of Los Angeles – Advocate Handbook

Non applicable –	At grade level,	Slightly below	Moderately below grade	Seriously below grade level Significantly below grade level (more		
no areas of	and in	grade level	level (more than 1yr).	(more than 1 yr). Variance	than 1 yr). Variance between	
concern	appropriate	(less than 1 yr),	Variance between	between cognitive ability	cognitive ability and academic ability	
	educational	in appropriate	cognitive ability and	and academic ability may	may indicate a learning disability, or	
	setting with little	educational	academic ability may	indicate a learning	Minimally attending school,	
	concerns overall.	setting or some	indicate learning	disability, or	unsuitable educational setting, or	
	May or may not	learning delays	disability. May not be in	unstable/multiple school	instability/multiple educational	
	have had moved	that are	appropriate educational	placements that may have	placements that may have affected	
	schools multiple	affecting grade	setting or may have had	affected grade level, or	grade level, or significant learning	
	times, but doing	level, that are	moved schools multiple	sporadic attendance or	disabilities that may not have been	
	well.	being managed	times which may be	evidence of significant	managed appropriately. May not	
		appropriately or	affecting grade level,	learning disabilities, that	have IEP and may need educational	
		may need	potentially sporadic	may not be managed	assessment, or has IEP but has not	
		minimal	attendance or evidence	appropriately and may need	progressed with current level of	
		additional	of learning disability that	significant additional	resources.	
		resources. May	may not be managed	resources to manage, may		
		or may not have	appropriately and may	not have IEP and may need		
		had moved	need more specific	educational assessment, or		
		schools multiple	resources to assist, may	has IEP but has not		
		times, but doing	not have IEP and may	progressed with current		
		fairly well	need educational	level of resources.		
		overall.	assessment, or has IEP			
			but has not progressed			
			with current level of			
			resources			

# **APPENDIX B. ADVOCATE DOCUMENTATION CHECKLIST**

WHEN	WHAT	ном	WHO	WHY
At end of first 30 days	"Baseline Scale" and "Advocacy Goals" TouchPoints are recorded by your SPC/PC during a collaborative discussion with your SPC/PC	<u>Refer 5.1</u>	Complete with your SPC	To identify advocacy needs and interventions directly relating your individual child and the terms of the court order.
Monthly	Record " <b>Child Visit Log"</b> TouchPoint	<u>Refer 5.2.1.1</u>	Complete <u>on</u> <u>your own</u>	To enter notes about your face-to-face visit or contact with your child.
Monthly	Record " <b>Case Note Log"</b> TouchPoint	<u>Refer 5.2.1.2</u>	Complete <u>on</u> <u>your own</u>	<ul> <li>To enter notes about your calls, emails, visits with other people in your child's life.</li> <li>To maintain appropriate CASA court records and timely access to relevant case information to SPC/PC.</li> </ul>
Monthly	Record " <b>Monthly Goals</b> <b>Update</b> " TouchPoint	<u>Refer 5.2.1.3</u>	Complete <u>on</u> <u>your own</u>	• To provide clear updates on the advocacy work provided on a monthly basis and keep advocacy interventions focused on the goals identified.
Monthly	Record " <b>Volunteer</b> Hours (Monthly)" TouchPoint	<u>Refer 5.2.2</u>	Complete <u>on</u> <u>your own</u>	To track Volunteer hours for regulatory standards and for continuing education requirements.
As Needed	Record/Update " <b>Contact(s) for Case"</b> TouchPoint	<u>Refer 5.3.2</u>	Complete with your SPC	• To keep contact info updated in the system - which can also be printed.
	Record/Update "Child Placement" TouchPoint	<u>Refer 5.3.3</u>	Complete with your SPC	To keep placement changes and information updated in the system which can also be printed.
	Record " <b>Case</b> Documents" TouchPoint	<u>Refer 5.3.1</u>	Complete with your SPC	• To upload case documents that are important to keep as part of the child's case file.
	Run "Contacts for Case" Report	<u>Refer 5.3.4.1</u>	Complete with your SPC	• To enable a printed list of your child's contacts.
	Run "Notes for Court Report"	Refer 5.3.4.2	Complete with your SPC	• To help in the preparation of a factual and objective CASA Court report of findings, observations, and recommendations.

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