### **Contract Case Consultant Main Tools**

This page provides a quick reference to tools for OCR-contracted Case Consultants. Each case consultant should regularly monitor OCR's Assignment List for potential cases, request case assignments, bill in CARES, and notify OCR at the end of each assignment by completing an End of Assignment form. The diagram below illustrates this workflow, and the key links following the diagram provides shortcuts to the Assignment List, CARES, and the End of Assignment form.

## Attorney Request for CC

- •OCR attorney emails CC Coordinator to request a CC on a case.
- •CC Coordinator updates the online Assignment List with broad information about the case.
- •CC regularly reviews the Assignment List for potential assignments.

## CC Request for Case

- •CC emails Coordinator Alex Wolff to request a particular case from the current Assignment List.
- •CC Coordinator conducts a preliminary conflict check and provides additional case detail for CC to do the same.

## **CC** Assignment

- If no conflicts, CC Coordinator officially assigns CC to the case.
- •CC Coordinator introduces CC to attorney via email.
- Attorney and CC directly exchange information as needed.

# Casework & Billing

- •While CC works with attorney on the case, CC enters activities and data into OCR's online billing and case management system CARES.
- •CC invoices OCR monthly via CARES.

### Assignment End

- •CC notifies CC Coordinator of assigment's end via online form.
- •CC Coordinator requests OCR attorney feedback via online form.

### **Key Links**

Assignment List: Regularly review the live-updating list of current cases for which OCR attorneys
have requested a CC on OCR's <u>CC Assignment List</u>. Log in to that page with the password
provided by OCR, and read the instructions above the case list for reminders about how to use
the list. Log out after your review.

#### • Billing:

- Billing Policies and Procedures: OCR's official billing/invoicing rules and supplement forms.
- Confirmation of CC Rate Form: Case Consultants who recently became an LCSW, LPC, or LMFT can request a higher OCR billing rate ("Case Consultant II") in CARES.
- <u>CARES Help Center</u>: How to use CARES (search tutorials, FAQs, features). For example, <u>learn</u> how to access cases here.
- Contact Info: Find contact information for GALs, CLRs, Litigation Support, and Staff Attorneys on the main <u>Attorney Center</u> page. Change your own contact info on the <u>OCR Change Request</u> Form.

### • End of Assignment:

- Whenever one of your case assignments ends, please notify OCR by completing an <u>End</u> <u>of Assignment Form</u>. This will notify the CC Coordinator to officially close this assignment.
- You can bill 0.1 in CARES per case for completing this form: Activity Group "Data Management," Activity Type "End of Assignment Form." Do not also bill to open/close case—that is the appointed attorney's responsibility.
- o If you want to remove cases from your My Appointments list, learn how to do so here.

Have a question that is not covered above? Contact Alex at 720-351-4351 or alexwolff@coloradochildrep.org.