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 and their 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).

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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/](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. You will receive an automated email within a few minutes (usually after at least 3 minutes). Note your CARES user name at the beginning of that 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 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).

Overall 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.

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1 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).
2 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).

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**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](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, 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

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3 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.

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.

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.

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. Use the checkbox directly above "Placements" if applicable to assert whether and why the initial 30-day in-placement visit is waived for this child. 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.

**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).

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4 Consult CID 04-06 for valid reasons to assert a waiver for the 30-day in-placement visit requirement. If the initial visit was logged in the old CARES system, under a previous office, or on the wrong case number, you may also use the “waived” checkbox and type the data-entry-related reason.
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). Enter amounts as needed. The minimum duration of an activity is 0.1 (6 minutes).5

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.

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."

5 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.
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.

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.

**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.\(^6\)

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.

**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.

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\(^6\) 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.

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.⁷ 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.

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⁷ 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. 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. For report accuracy, if your Initial Visit activity was paid on the wrong case, assert a waiver for applicable child(ren) in the new case as described in Child Party Table OR record the non-billable initial visit in the new case.
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 "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.

**Reports**
OCR is developing many reports to help you view and analyze your CARES data. To access your reports, click on "Reports" on the left-side menu in CARES, then click the blue "Go to Reports" button. After you click "Go to Reports," a new tab will open in your internet browser and you will automatically be logged into "TIBCO Jaspersoft," which is just the CARES report-processing website. CARES will remain open in your original tab, and you can return to CARES at any time to continue using CARES as usual.

**Running Reports**
After you click "Go to Reports" in CARES, you are automatically taken to Jaspersoft’s "Library" screen, which shows you a list of all of the reports you can run at this time. You can click the "Library" button at the top of the screen at any time to return to a list of all of the reports currently available. The "Name" column shows you the name of the report. The "Description" column gives you information about each report. Click the name of a report to run it. Input any parameters (see below), then click "OK" to view your results.

**Notes on Dates and Other Input Controls**
Most reports will require you to enter "Input Controls" (parameters) such as a date range or an attorney name before viewing data. When entering dates, it is easiest to click on the small calendar icon to the right of the date field, then navigate through the calendar to the date you want. You can type a date, but the date must be formatted as MM/DD/YYYY—the reporting tool will not accept fewer digits, different separators (slashes are required), or an order other than month-day-year.

After entering Input Controls, click "OK" to view your results. You can also click "Apply" to view results without closing the Input Controls window, or "Reset" to clear your entries and start over. Click "Cancel" to close the Input Controls window without applying changes. Click "Save" to save your current inputs with a name of your choice—this will allow you to reuse those dates or other parameters quickly in the future.
Working With Results
After your report loads, you have several options to adjust your view and "export" (meaning save) your results. The buttons pictured and described below can be found in the upper right of the Jaspersoft screen.

Zoom to Increase Size
OCR recommends adjusting the zoom settings shown above to make the report easy to see on your screen. To adjust your zoom, click the plus and minus buttons to make the report bigger or smaller.

Search Report Contents
Type any words or terms that appear in the report (such as a case number) into the "search report" box, then click the magnifying glass. If the word(s) you typed are found, they will be highlighted yellow. Click the right and left triangles next to the word(s) you typed into the “search report” box to navigate among them.

Changing Pages
If your results appear on more than one page of a report, use the right and left triangles in the upper right-hand corner of the Jaspersoft screen to move between pages. You can also type the page number you want into the "Page" field to jump to it.

Exporting and Printing Reports
The buttons pictured and described below can be found in the upper left of the Jaspersoft screen. Please note, there is no need to save reports within Jaspersoft—clicking the save (disk) icon itself will produce an error because the reporting tool cannot be modified. If you accidentally click this button, you can just "close" the error and move on.

To save or print a copy of your specific results shown, hover over the "Export Results" button pictured above and choose a format (usually PDF or Excel). "Export" just means to save the results in another format and/or file. For example, choose "PDF" to download the report. You can print that PDF and/or save it to your device.

Change Inputs
Click the "Change Inputs" button shown above to change the Input Controls (parameters) you entered to generate the data, such as dates or an attorney name.

Logging Out of Reports
When you are done using the Jaspersoft tab of your web browser (the CARES report-processing website), "Log Out" in the upper-right of the screen. You will also automatically be logged out after a period of inactivity. To log back in, do not use the Jaspersoft login screen; instead, always access reports via CARES > Reports.
**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.

**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. 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). 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.

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8 OCR is not responsible for text and data rates that may apply depending on your mobile carrier plan.

9 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.
- 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 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](https://fs30.formsite.com/COCR/AddToCARES/index.html).
- Contact OCR to deactivate users.

**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.

<table>
<thead>
<tr>
<th>Permission</th>
<th>Managing Attorney</th>
<th>Case-Carrying Attorney</th>
<th>Non-Case-Carrying Attorney</th>
<th>Paralegal</th>
<th>SSP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Be Appointed to Cases</td>
<td>✓</td>
<td>✓</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Create/Edit Additional Users</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Create/Edit Attachments</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Create/Edit Cases</td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Create/Edit Child Parties</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Create/Edit Involved Persons</td>
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<td>✓</td>
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</tr>
<tr>
<td>Create/Edit Notes</td>
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</tr>
<tr>
<td>Submit Invoices</td>
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<td>x</td>
<td>✓</td>
<td>x</td>
</tr>
<tr>
<td>Submit Own Fee Requests</td>
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<td>✓</td>
<td>x</td>
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<tr>
<td>View Credits</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>View Invoices</td>
<td>✓</td>
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<td>✓</td>
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</tr>
</tbody>
</table>
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. For the fastest solution, please remember the following:
- Describe precisely where you got stuck in this handbook—this is crucial for OCR 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.