

CasaManager: Jump Start on Data Entry

Welcome to the CasaManager Family! Let's get started!

CasaManager is a "relational" database so you will enter data in one place, one time, and you will see that data is presented to you in different views depending on the screen you are looking at. The relational aspect of our solution makes data entry very fast and reports more accurate as there is less chance for user data entry error. **After you get FileMaker and CasaManager installed enter data in the step order prescribed below.**

The instructions in this jump-start document are intended to be very brief. Please refer to the CasaManger User Guide in the Agency's DropBox folder for more detailed instructions.

All data is entered into the system when you are in "Browse" mode. There is no "save" button in CasaManager. The information you enter into the various fields is automatically saved the minute you click outside a field.

First Time Log In Credentials

The first time you log into CasaManager you can use the "back door" log in and password. Once you have created staff accounts (Step 1), log out and then log back in as yourself. Use the following credentials to log in to create staff accounts: User name: **admin** and Password: **casamgr**

Screen Layout & Overview

1. Navigation Modules & Blue Bar Links:

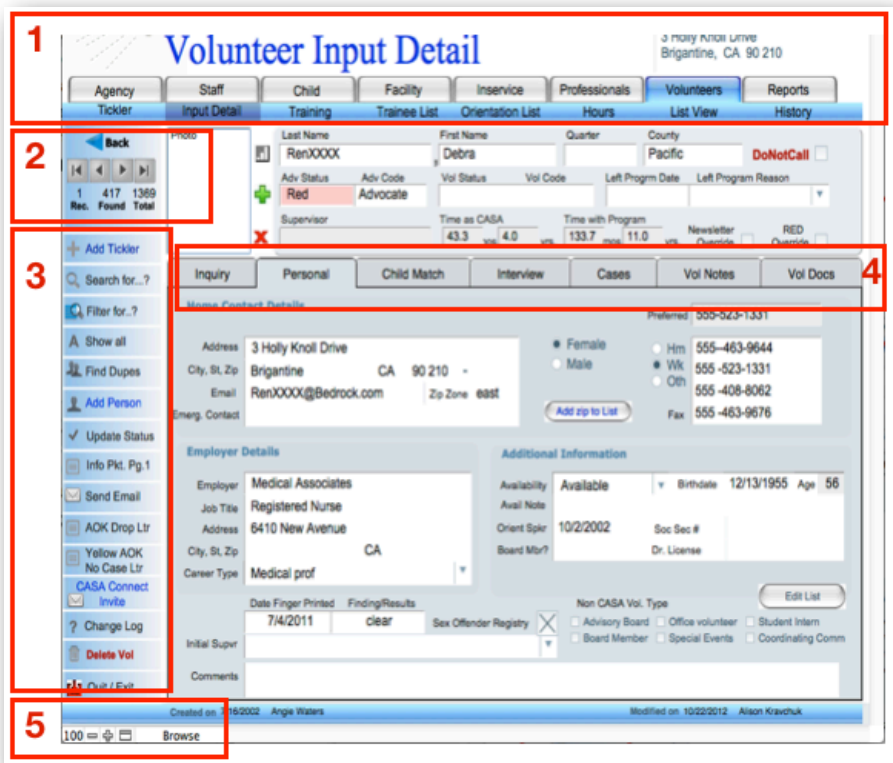
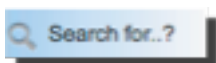
Click the one of the eight large tabs to access the desired module—i.e. click the Staff module to create new staff profiles. The blue-bar hyperlinks take you to different windows within the selected module.

2. Navigation Buttons:

Get to record 1..2..3..etc. within a found set of data A "found set of data" is a group of records that meet the search criteria: i.e. Active cases.

3. Button Bar:

Executes functions on the viewing window. For example:



4. Sub-tabs: Click to access and view; or enter more details in the sub-fields for the related record.

5. Viewing Modes & Size: Viewing Modes: Browse, Layout, Preview, or Find. Viewing size 100% (+ or -)

Step 1. Create Staff Accounts

For each staff member create a staff account. Click on the **Staff** module > click the **Add Staff** button > enter staff information, create user name and password, assign account privileges. Typically there is only ONE (1) user with "admin" privileges. That person will have all rights and access to modify report/letter templates and modify records of cases that are not assigned to them. All other staff members should be given the "staff" privilege.

Please note, the "office manager" privilege is rarely used. This is an access account for someone that will manage payroll increases only.

IMPORTANT: If the Staff member is a Case Supervisor, click in the Supervisor ID box to auto generate an ID number for that Staff member so you can attached that person to case files later on.

Step 2. Begin Entering Data

After you log in to CasaManager for the first time, there are several areas of resource data you will want to enter before you begin entering children.

Enter data in the order suggested below (1...2...3... etc.) doing so will speed up data entry significantly. You can find detailed information for each item listed below in the corresponding section of the CasaManager User Guide. If your data was migrated from an alternate solution, some of this data may already be imported into your database.

Enter or review the following in this order:

1. **Agency** information, zip codes from your county or surrounding area. Click on the **Agency** Module to access data entry screens.

Multi-County Agency Advisory: If you an Agency serving children in multiple counties, use only a comma in the County field to delineate the counties you serve. Do not use symbols or the word "and". For example, if you serve children in Orange, Weston and Smith County you would enter those three counties in the County field like this: Orange, Weston, Smith

Customizing the Database: Under the **Customize** the blur-bar link you will see several sub-tabs. Flip through those. What you see listed are the items/choices that will appear to you on the drop-down lists when you are doing data entry.

Most agencies modify the list for Hearings found under the Case Related 2 tab. You can simply type in the field to add to the drop down box.

NCASAA Descriptors:

Descriptors with an asterisk (*) next to them are terms/types used on your National CASA survey. We recommend you do NOT delete or change those.

- Professionals** - judges, social workers, attorneys etc. Click on the **Professionals** Module > on the left-hand button bar click **+ Add Prof.**
- Facilities** - group homes, shelters, treatment centers etc. Click on the **Facility** Module > on the left-hand button bar click **+ Add Facility.**
- Inservice Workshops and Outreach Methods** your agency has given or used in the last fiscal year plus upcoming workshops. Click on the **Inserv/Outreach** Module > on the left-hand button bar click **+ Add New.**
- Active CASA Volunteers**, including their training information, active non-CASA Volunteers, and Advocates that are currently in pre-service training. Click on the **Volunteer** Module > on the left-hand button bar click **Add Person.**
- Family Groups** - Start with mother's who have children currently in dependency. Click on the **Child** Module > on the blue bar link click **Family** > on the left-hand button bar click **New Family.**

Well Done! Now you are ready for your New User Orientation. During this presentation we will cover how to add Advocates to cases and other ways to effectively manage casework and Volunteer training.

To schedule your 60 minute new user orientation, simply email alison@casamanager.com with some dates and times that will work for your office. Please be sure to include your contact information—including the Agency's city and State—so we can call your office if needed.

