Advocate Link

Advocate User Guide

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San Francisco CASA

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San Francisco, CA 94110

CASA Court Appointed Special Advocates FOR CHILDREN

SAN FRANCISCO CASA

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Document Purpose

This user guide provides step-by-step guidance on how to conduct critical activities in Advocate Link, SF CASA's Salesforce-based Advocate Community.

If you have questions or feedback about the community or this guide, please contact your Case Supervisor.

Important Advocate Link Terms

Activity Log

These are the efforts or actions you commit to your CASA and/or ERH assignment. Each activity will be its own log. For example, if you attend a team meeting without the youth, that will be a log. If you spend time with the youth later that day, that will be recorded as a different log. Each log will be divided into advocacy areas. Activity logs should be entered as they occur to ensure accuracy. Please feel free to batch phone and email time on the same topic.

Quarterly Surveys

These surveys are to track each youth's progress across the five core advocacy areas (Community Connections, Education, Healthcare, Placement, Independent Living Skills (ages 16+) over the quarter by completing them at the end of each quarter. Completing surveys means ranking each of the indicators for the youth. These will be sent to you via email, but the results will be stored in Advocate Link.

CASE: Youth's Case

Consider this the youth's SFCASA case; this includes your assignment. All information under the case is related to the youth's dependency and/or juvenile justice case, such as the hearings and professionals. Most of your data entry and edits will be on the youth's case.

CONTACT: Youth's Contact

This appears as a link that is just the youth's name on the case's page. Consider this the more personal and un-changing information about the youth, such as family members, important non-foster care specific relationships and demographics. All individuals have a contact, including volunteers, professionals, and youth. *A youth's placement is found here, but you must notify your Case Supervisor if this changes*. It is also in the contact that you will add the personal (non-professional) relationships your youth has.

NAMING CONVENTION FOR FILE UPLOADS:

[youth's initials][document date][type of documents]

Ex. "S.T. 05.24.2018 Transcript"

Login and Getting Started

When you are first set up with access to Advocate Link, you will receive a Welcome Email with an email and a link to set up your password.

You can access Advocate Link in subsequent visits by navigating to the URL: https://sfcasa.my.site.com

TIPS AND TRICKS

- You will automatically be logged off after ***15 minutes*** of inactivity.
- When entering any information that is urgent, please contact your Case Supervisor to notify them as well.
- Please make sure to never upload photos of the youth into the database

Advocate Link is now optimized for Mobile!

TIPS AND TRICKS

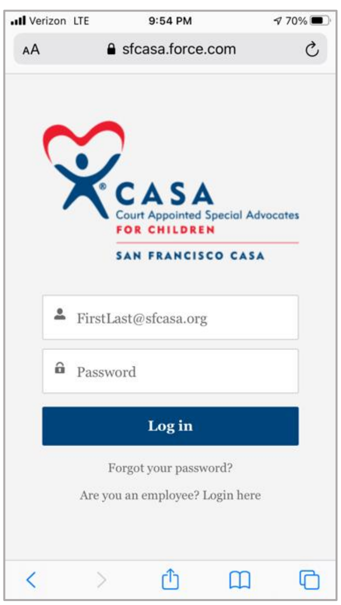
All actions and functionality is now mobile accessible and optimized for various devices! Key benefits and use cases will be:

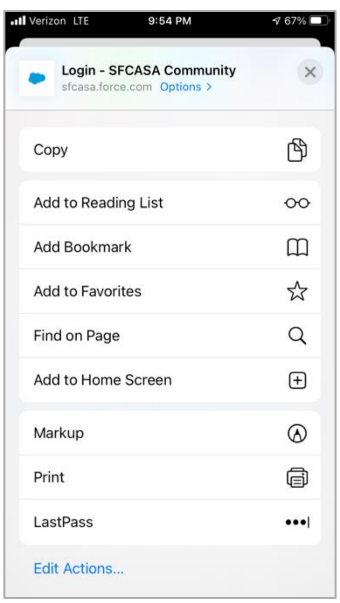
- Entering log hours on-the-go after a meeting
- Accessing court reports and updating outcomes (dismissal, etc.) in real time.

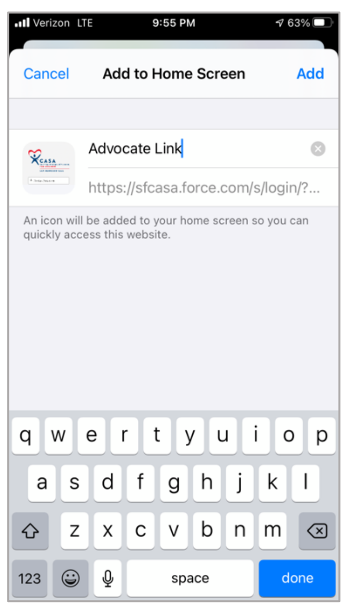
Creating an App for Advocate Link

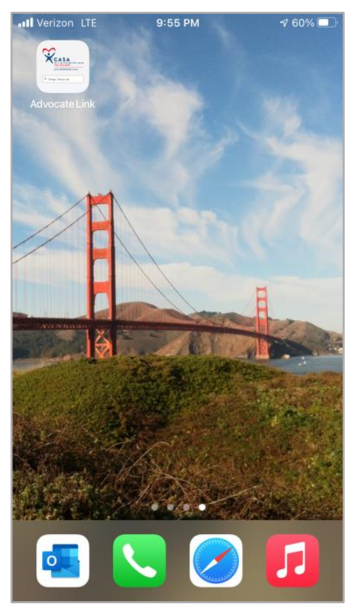
Note: Screenshots below shown for iPhone/iPad.

1. Launch your mobile preferred browser.
2. Navigate to https://sfcasa.my.site.com
3. Click the options button for the browser, and choose the "Add to Home Screen" option
4. Rename the link to "Advocate Link" and click "Add".
5. Now you can Launch AL from your home screen of your mobile device anytime!



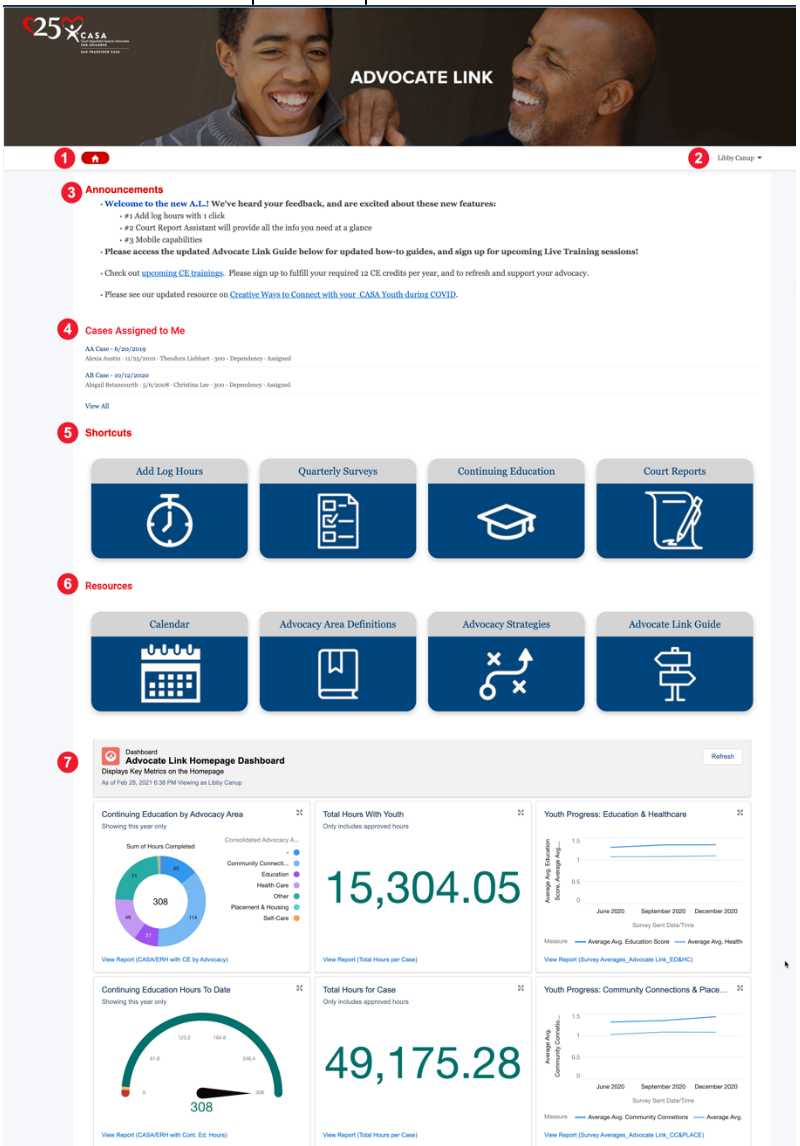






Introduction to the Home Page

1. **<u>Home Button:</u>** Click on this button whenever you want to navigate back to the Home screen. This button is always available on any screen.
2. **<u>Your Name:</u>** By clicking on your name or the down arrow next to your name, a drop-down list will show up. The options available are:



a. Home – To navigate to the home screen.

b. Edit Contact Information – Personal information like address, phone, language, etc. can be updated along with your email id.

3. **<u>Announcements:</u>** Area where SFCASA will publish any new announcements or links
4. **<u>Cases Assigned to Me:</u>** This is where the case assigned to you will be mentioned. Click on the name of the case to navigate to the Case page. If you would like to view all cases assigned to you, click on the *View All* link
5. **<u>Shortcuts:</u>** This is your one-click access to common actions and data regarding

   a. **Add Log Hours** – Quick link to log hours without having to navigate to the case

   b. **Quarterly Surveys** – Comprehensive screen showing open items that require your action and key metrics about a particular focus area.

   c. **Continuing Education** – Information regarding upcoming education classes and graphs showing your Continuing Education progress

   d. **Court Reports** – Gives a quick view of upcoming court hearings.

6. **<u>Resources:</u>** Provides quick access to commonly requested guides and information.

   a. **Calendar** – Link to SFCASA's Calendar of Events

   b. **Advocacy Area Definitions** – Link to document containing important definitions.

   c. **Advocacy Strategies** – Link to a helpful advocacy strategies web page

   d. **Advocate Link Guide** – Link to Advocate Link Guide web page

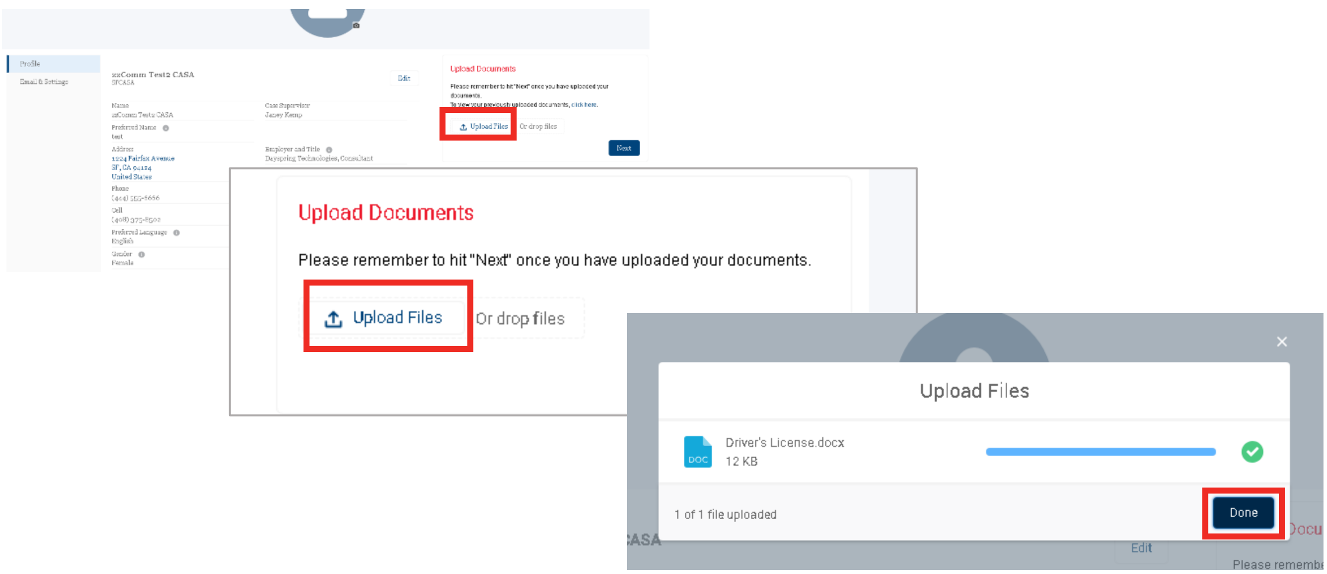
7. **<u>Dashboard:</u>** This dashboard shows some helpful data points that relate to your youth's progress and key metrics for Logs and CE hours.

Uploading Driver's License and Auto Insurance

1. To upload a photo of a renewed or updated driver's license or auto insurance card/policy, first save the file (from email or upload from scan) on your computer.
2. Login to the Advocate Link, click on the down arrow to the right of your name at the top right of the screen or click your name. Select "Edit Contact Information".
3. Click on the Upload Files button underneath Upload Documents on the right of your screen.
4. Select the file from your computer (or mobile photos) and click Open.
5. Select the type of file from the dropdown.
6. Enter the date of expiration.
7. When the file has completed uploading, click Done.
8. Click Next
9. To view your uploaded documents, click the link in the text that reads, "*To view your uploaded documents, click here*." This links to your personal files.

TIPS AND TRICKS

You can take a photo of documents on your mobile device and upload your photo using native mobile attachments feature.



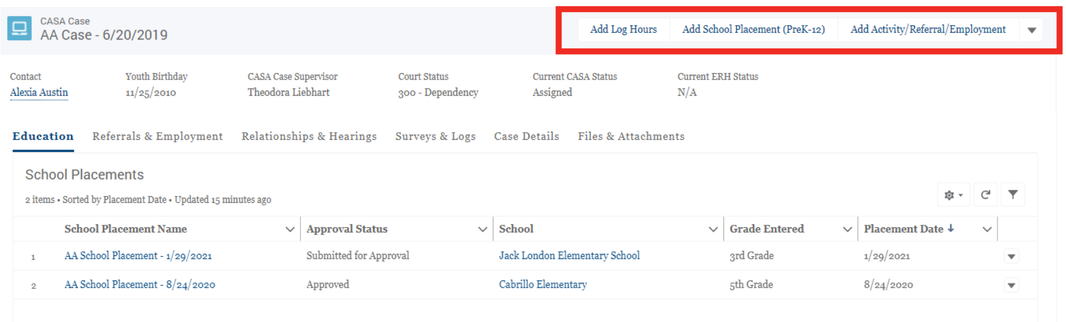
Updating Youth Information

There are five tabs for your CASA case page

- Education
- Referrals & Employment
- Relationship & Hearings
- Surveys & Logs
- Case Details
- Files & Attachments

You will be updating most of your information in all the tabs except Case Details. This is where you can review or updated key details about your assigned case.

Adding new information will be done by clicking on the buttons at the top right of the screen. You may need to click the arrow to see more options.



TIPS AND TRICKS

This information must be approved by your Case Supervisor. Once you've submitted a change, it cannot be edited until your Case Supervisor has reviewed it.

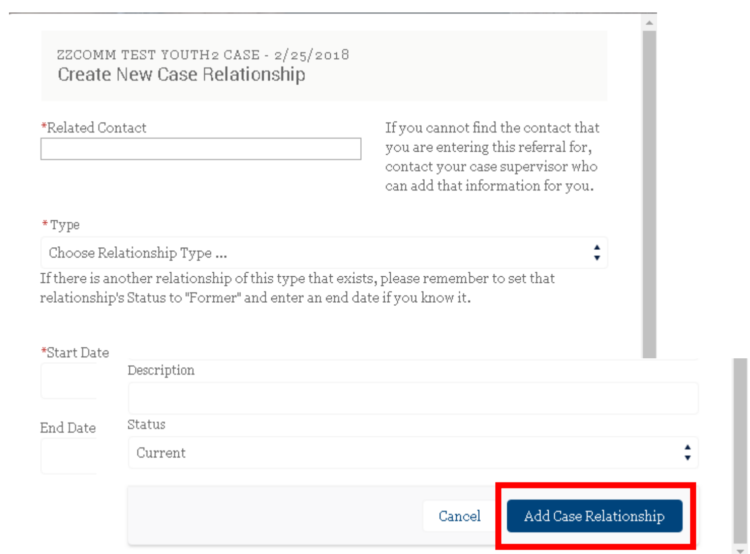
Ensure you get familiar with this page. This is where you can view all information regarding your Youth.

Updating Youth's Case Information (On the Case Page)

Add Case (Professional) Relationship Record

When learning a new professional has been assigned to your youth, using down arrow select (seen in image on previous page) *Add Case Relationship Record*.

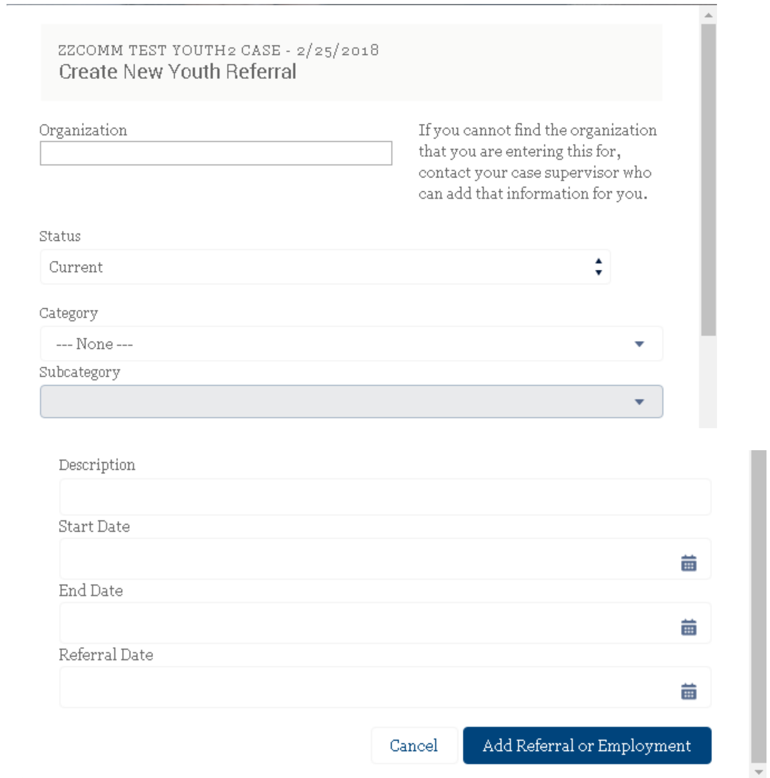
1. Enter the name of the professional. When you enter the name, enter the first two or three letters of their name and hit enter.
   NOTE: If the professional does not appear, contact your Case Supervisor.
2. Select the appropriate professional.
3. Choose the relationship type.
4. Enter the date of the start of the relationship.
5. Click the *Add Case Relationship* button. This will automatically close the previous professional assigned with the same title unless it is a relationship the youth may have more of such as a therapist. Please discuss with your Case Supervisor.



Entering an Organization Your Youth Participates in

If you are unsure of the type of activity or employment, please contact your Case Supervisor.

1. Click *Add Activity/Referral/ Employment* at top right of Case page.
2. Enter the organization name in the organization field until it appears in the drop-down field.
   NOTE: If the organization does not appear, contact your Case Supervisor
3. Choose the appropriate category.
4. Provide a brief description.
5. Enter the start date; if it's a referral, enter the referral date.
6. Click *Add Referral or Employment*.



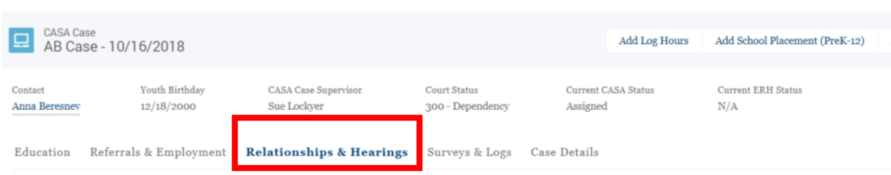
TIPS AND TRICKS

Remember to update the end date when youth is no longer participating. The *referral date field* is only for referrals.

Editing Court Hearing Information

You can edit court hearing information as needed if there is a change in the time or department.

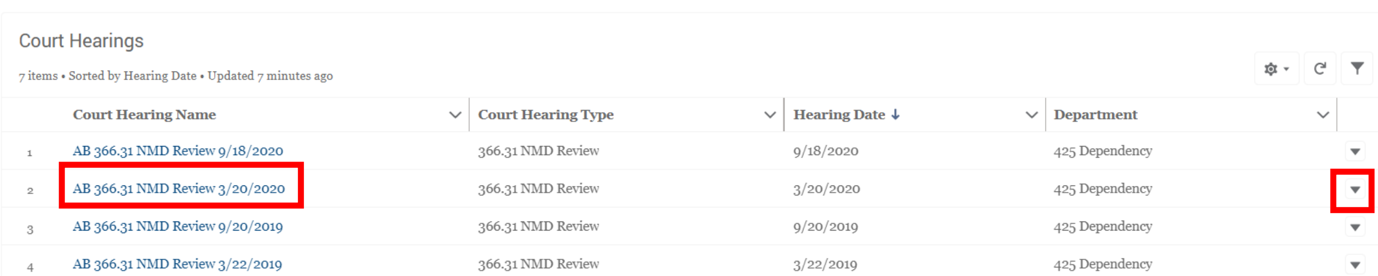
1. Click on the Relationships & Hearings tab on the Case page.



2. Scroll down to the Hearings section. Click the down arrow and select *Edit* next to the hearing or select the particular hearing you need to edit in the hearings section and click edit.
3. Update the department or time if either is incorrect.

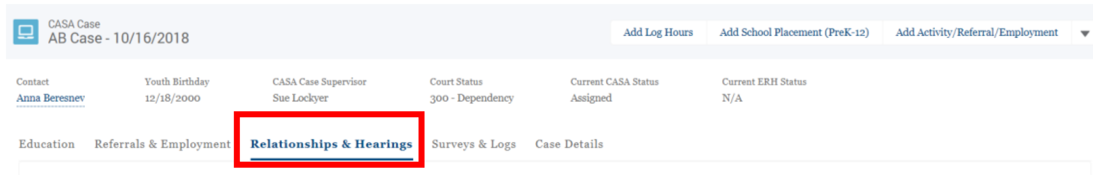
TIPS AND TRICKS

You can view upcoming court hearings by clicking on Court Reports on the Home screen. Click on the court hearing name and navigate to the Files & Attachments tab to view the document on an upcoming court hearing



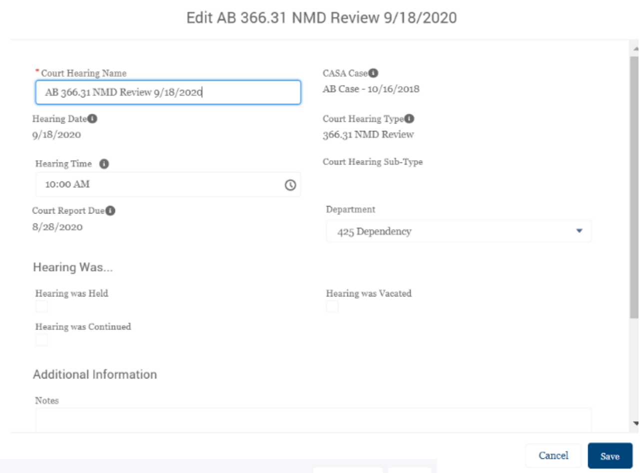
4. After each hearing, check the box indicating whether the hearing was continued, vacated, or heard.
5. You will also see here the date the first draft of your court report is due to your Case Supervisor.

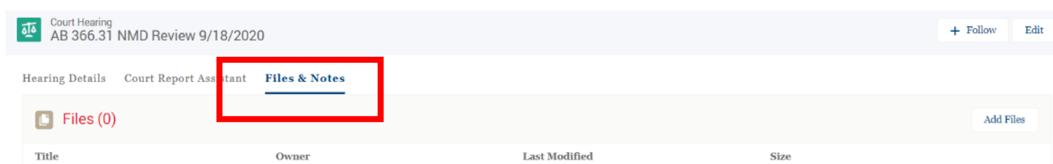
6. When all necessary editing has been done, click *Save*.



Viewing Your Court Report, the Status Review Report, or a Hearing's Findings

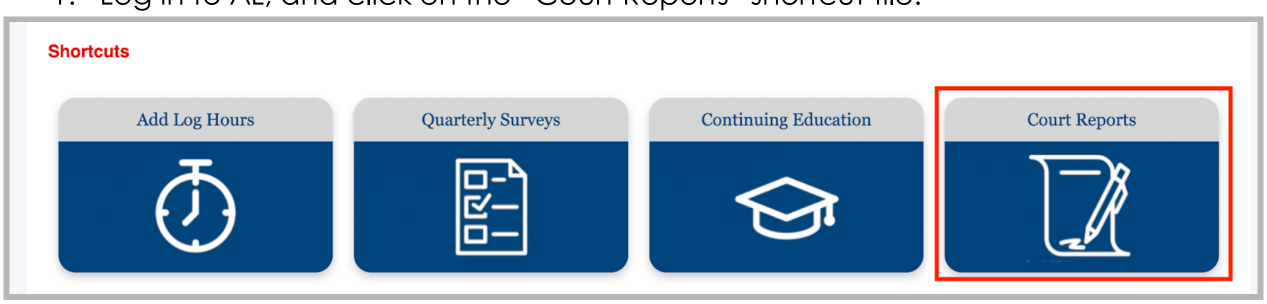
1. You will receive an email from the SFCASA program assistant when a court hearing document has been uploaded to Advocate Link for you to view.
2. Click on the youth's case.
3. Click on the *Relationships & Hearings* tab
4. Scroll down to the *Court Hearings* section and click on the hearing for which you want to view the document.
5. The document will be found when you click on the *Files & Notes* tab



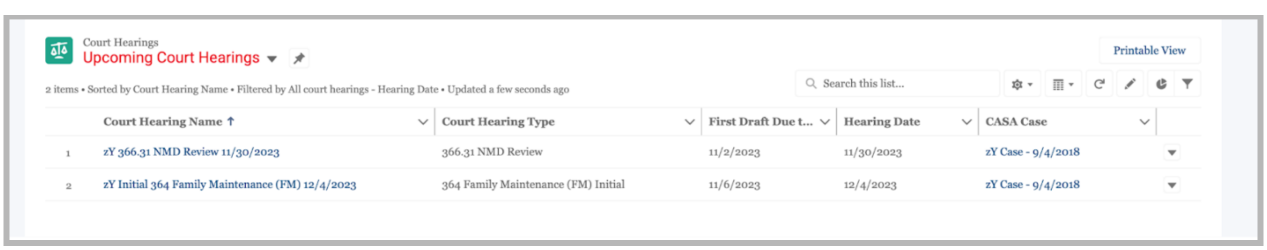


Creating and Editing a Court Report

1. Log in to AL, and click on the "Court Reports" shortcut tile.



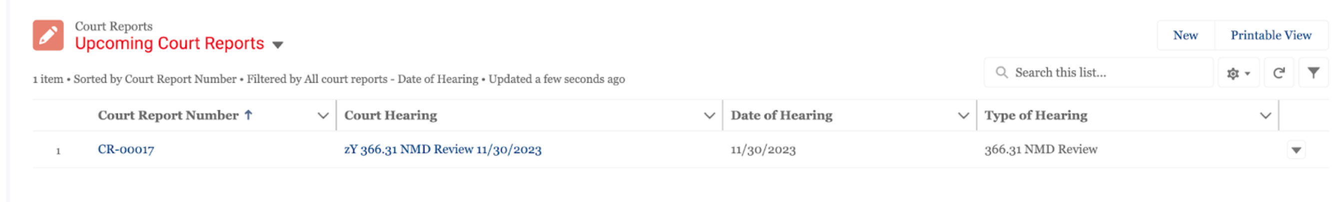
2. Click on the blue hyperlinked name of the Court Hearing you'd like to create a Court Report for



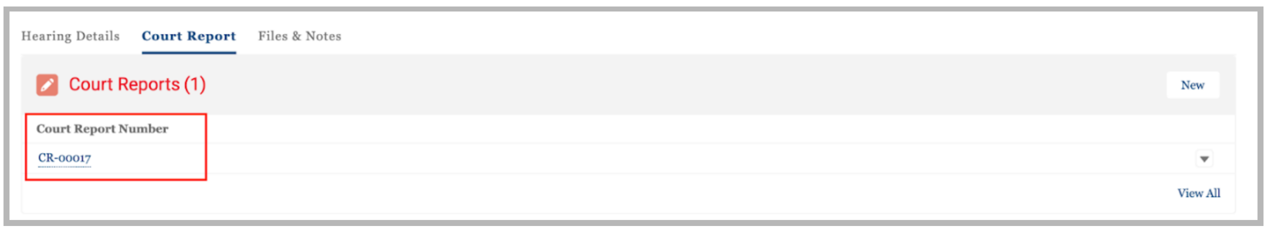
3. Navigate to the "Court Report" tab, and click the "Create Court Report" button on the top of the page to generate a new report.

TIPS AND TRICKS

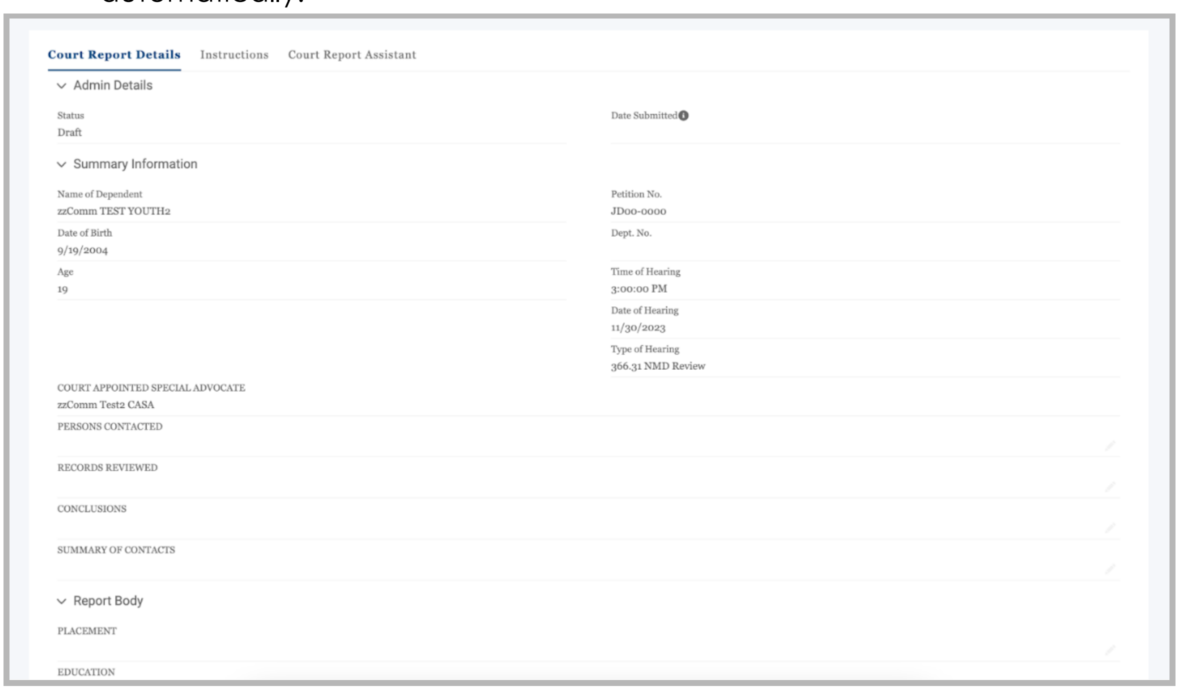
Once a report is created, you can find it directly in the Court Reports tab under the "Upcoming Court Reports" section. This section is below the "Upcoming Court Hearings" section



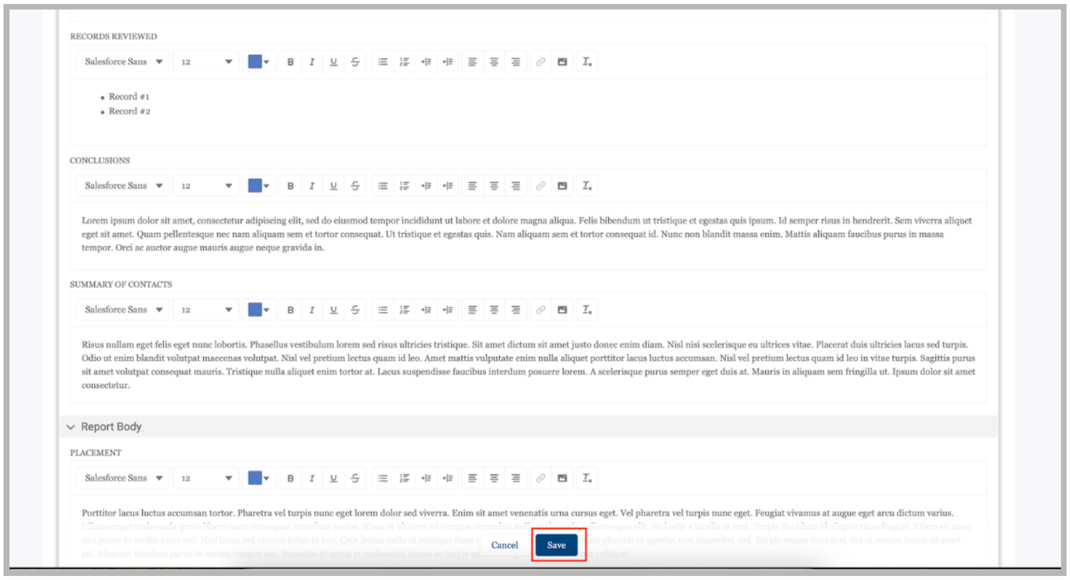
4. Click into the Report name (will be in the format "CR-######").



5. Information about the Hearing and your Youth will appear at the top of the page automatically.



6. Click the pencil icon next to any of the open report fields to begin entering information into the report. Once completed, click the "Save" button.

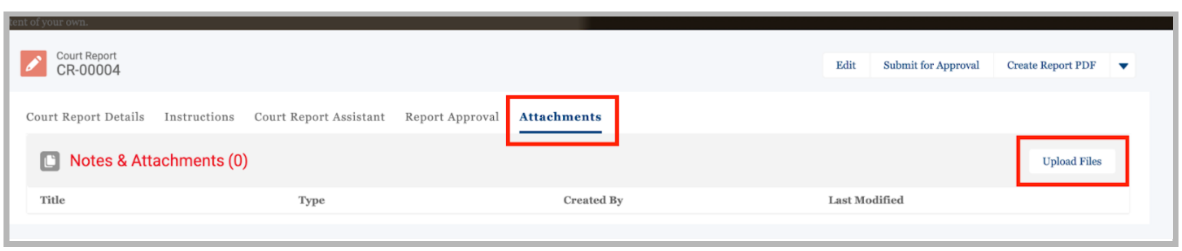


TIPS AND TRICKS

- You can use the full name of your youth - no need to use initials
- You can edit text within each section to add bullet points, numbers, etc. to the text to update the formatting
- Click on the "Instructions" tab to review detailed instructions for each section. You can move to this and the "Court Report Assistant" tab without losing your work.
  Your session with AL will log out after 2 hours - save your work as you go to avoid losing any additional inputs.

Uploading Photos for the Report (Optional)

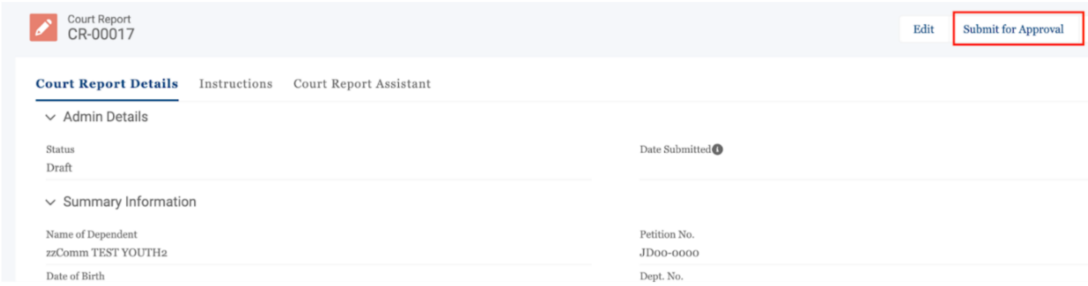
1. If you'd like to attach photos to your court report, click on the "Attachments" tab on the Court Report, then click "Upload".



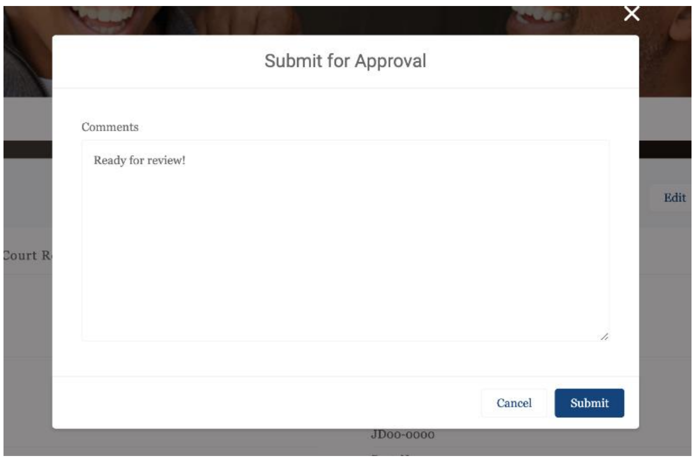
2. Upload the photos you'd like to include. Click "Done" once the upload status is complete.

Submitting a Court Report for Approval

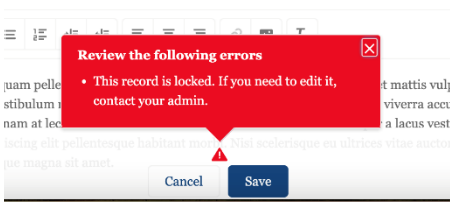
1. Once you have completed your Court Report in AL, click the "Submit for Approval" button to submit it to your Case Supervisor for review.



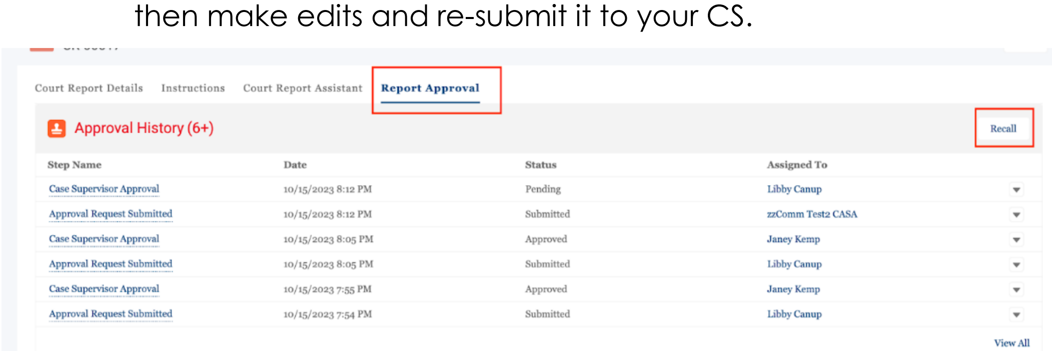
2. You can enter notes (optional) for your Supervisor when submitting for approval.

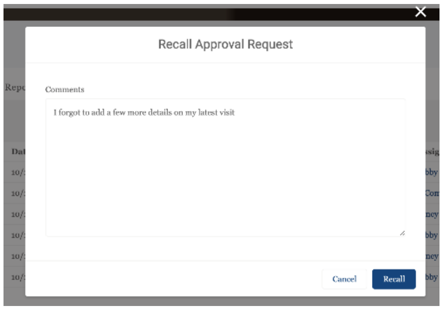


3. Once submitted, you will not be able to edit the report, and will see an error message if you try to make any edits.



4. If you forgot something or want to make further edits before your CS reviews the report:
   a. Click on the "Report Approval" tab on the Court Report record
   b. Click the "Recall" button to recall the report, then optionally add Recall notes. You can then make edits and re-submit it to your CS.





5. After your CS review the report:

   a. If they have Approved the report, you will receive an email noting that the report has been Approved. No more edits can be made after approval (see below screenshot).

YOUR COURT REPORT HAS BEEN APPROVED!

Hi Libby Canup,

Your Court Report has been approved! You can review the final version in AL using the below link.

Thank you!

Hearing Name: zY Family Reunification 6/1/2021
Hearing Date: 8/10/2023
Approved By: Libby Canup
Approved Date: 10/12/2023 9:11 PM
Approval Notes:
Link to Report: https://sfcasa.my.salesforce.com/a3V5G000003Y0zH

   b. If they have comments or would like you to review the report further, you will receive an email with notes and feedback, along with a link to the report in AL.

YOUR COURT REPORT NEEDS FURTHER REVIEW

Hi Libby Canup,

Your recently submitted Court Report has been reviewed by your Supervisor and needs further updates. Please review the notes below, and use the link to navigate to and update the Court Report information as instructed. Once updated, please resubmit the report for approval.

Thank you!

Hearing Name: zY Family Reunification 6/1/2021
Hearing Date: 8/10/2023
Returned By: Libby Canup
Returned Date: 8/22/2023 4:49 PM
Return Notes: Please address the inline comments in Red
Link to Report: https://sfcasa.my.salesforce.com/a3V5G000003Y0zH

   c. You can review their inline comments directly in the report.

CONCLUSIONS

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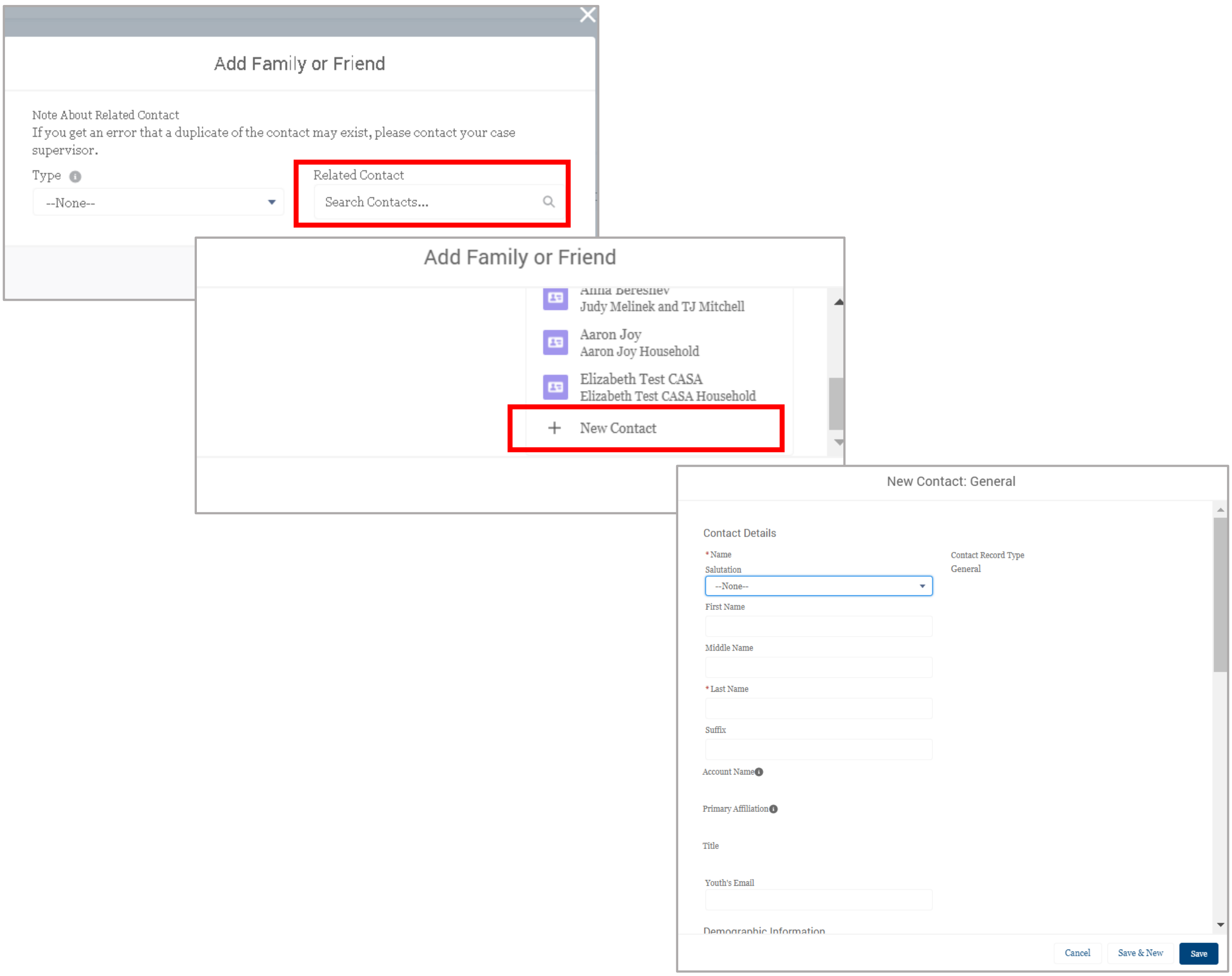
[CS Notes]: Please add in information about the most recent visit

6. Continue to resubmit the report for approval until you've received Approval from your CS.

Entering Youth's Contact (Personal) Relationship:

These are relationships of permanency (including family members) rather than professional relationships assigned to the case through the court.

1. Click on the youth's contact.
2. Click on the top right button, Add Family/Friend.
3. When you enter the name, they will appear in the drop-down menu.
    a. If they do not appear, they are not yet in Salesforce. You must scroll down to select to Create New Contact.
    b. Please enter the information you have about this person. Click Save
4. Select the type of relationship and then Save.

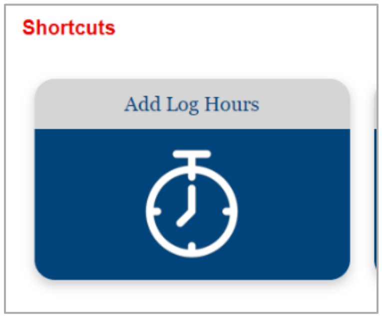


Youth's Organization Affiliations

You do not need to edit these. These auto-populate from organizations the youth has been involved with in terms of referrals, activities, and employment.Creating and Completing Logs

Entering Logs

1. On the Home Screen click on *Add Log Hours*.
2. On the next screen enter the Case Name assigned to you.
3. Enter the date of the activity
4. Next choose the *Contact Type*. This may pertain to a Telephone Call, Personal Visit, Case Meeting, or Emails/Texts. (If it's not applicable, select *N/A* and enter N/A under Persons Contacted.
5. Enter two or three sentences about how this time was spent in the Summary of Discussion field.
6. Enter *Total Hours* and *Hours with Youth*.
7. Break up the total hours by percentage of whole in the *% Time in Education, Administrative Work, Healthcare, Court Hearing Time, Community Connections, Travel Time, Placement and Independent* as applicable.
8. Click *Confirm* to submit your log to your case supervisor for review and approval.
9. This log will now show up under the *Logs* section on *your CASA Case*. You are unable to edit logs while they are pending approval by your Case Supervisor.



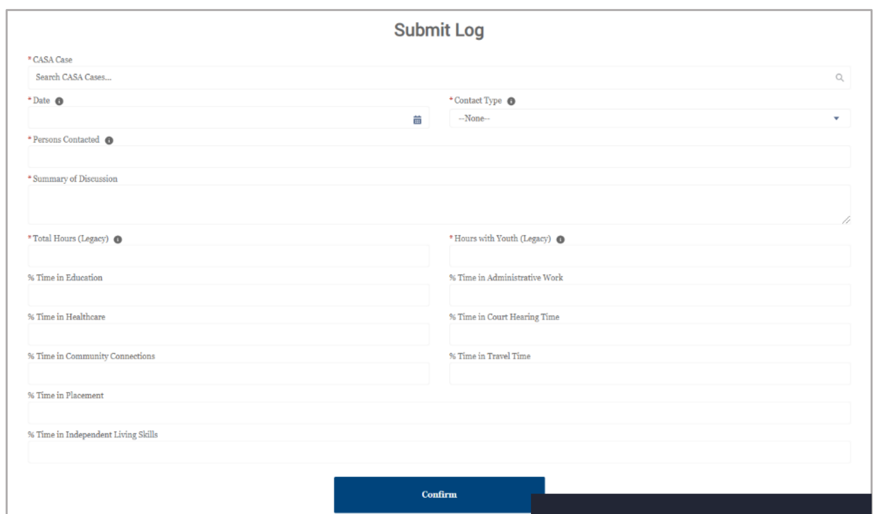
TIPS AND TRICKS

Always use youth initials only in logs

You can view logged activities by navigating to the Case assigned to you and clicking on the tab Surveys and Logs

New Logs can also be created by clicking "Add Log Hours" on the Case Detail Page

When entering log hours for a case meeting or personal visit, please remember that "travel time" is required as an advocacy area. If you have called in to a case meeting, select the advocacy area of travel time and enter 0%.



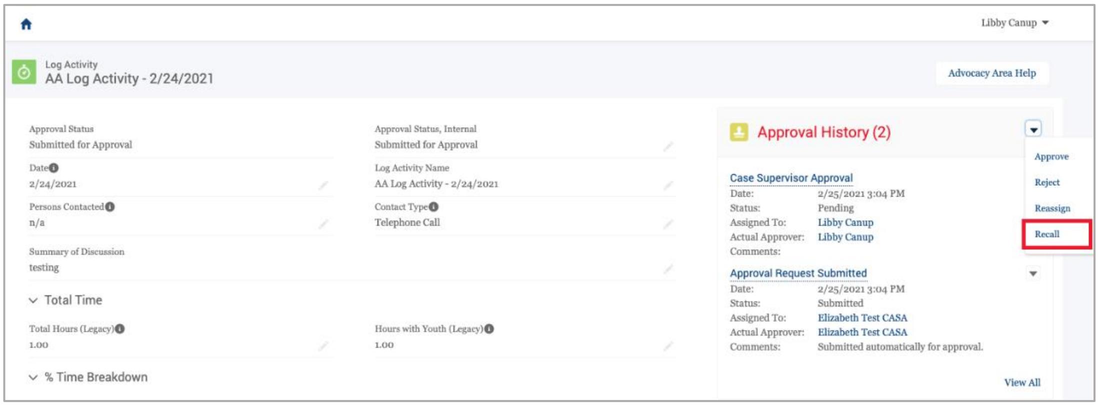
Recalling Logs

Navigate to the log hours you need to update from the Case Detail > Logs & Surveys tab, and clicking on the Log Activity Name.

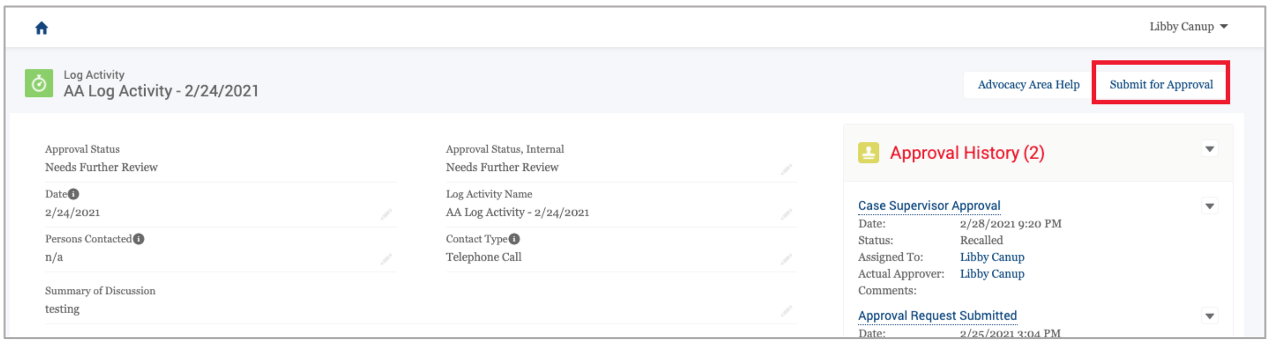
1. In the "Approval History Section, click the dropdown arrow and choose the "Recall" option.
   a. ***Optionally,*** you can enter notes about why you want to recall. Feel free to skip this step if you'd like.

TIPS AND TRICKS

If you've made a mistake, you can recall a log before your supervisor approves it.



2. Edit the log details by clicking the edit arrows next to the fields and updating the information. Click Save when you are finished to save your updates.
3. Once ready for review, click "Submit for Approval" to resubmit for approval to your Case Supervisor.



Correcting Logs

1. In the email you receive notifying you need to make updates, click the link to navigate to the log activity.

YOUR LOG ACTIVITY NEEDS FURTHER REVIEW

Hi Elizabeth,

Your recently submitted Log Activity, AA Log Activity - 1/26/2021, from 1/26/2021 has been returned for review by your Case Supervisor. Please review the notes from your Supervisor below, and use the link to navigate to and correct the Log Activity. Once complete, please resubmit the for Approval.

Thank you!

Log Activity Date: 1/26/2021
Returned By: Libby Canup
Returned Date: 1/22/2021 10:59 AM
Case Supervisor Notes: Please update persons contacted.
Link to Log Activity: https://partial-sfcasa.cs68.force.com/a0w1D0000019pWF

2. Edit the log details by clicking the edit arrows next to the fields and updating the information. Click Save when you are finished to save your updates.

3. Once ready for review, click "Submit for Approval" to resubmit for approval to your Case Supervisor.

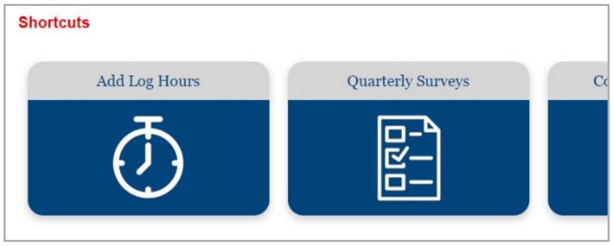
TIPS AND TRICKS

You will receive an email with notes from your Case Supervisor if you need to make updates to a log.

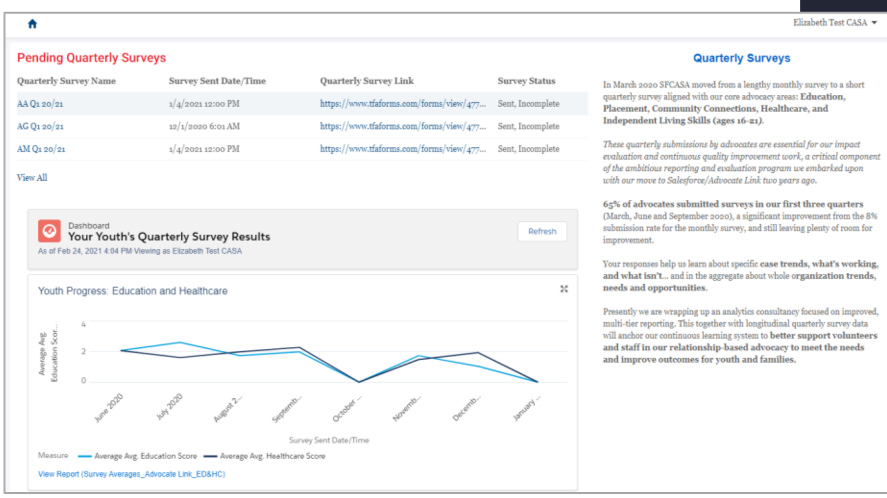
Submitting Quarterly Surveys

Viewing Information on Surveys

1. On the Home screen, click on Quarterly Surveys.

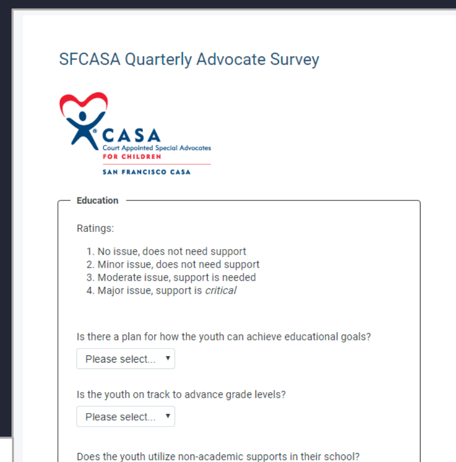


2. On the next screen you can see a list of the pending surveys that need to be submitted, a graph of the progress of your youth in categories like Education and Healthcare, Community Connections & Placement, and Independent Living. *To complete a survey, click on the survey link rather than the survey name.



TIPS AND TRICKS

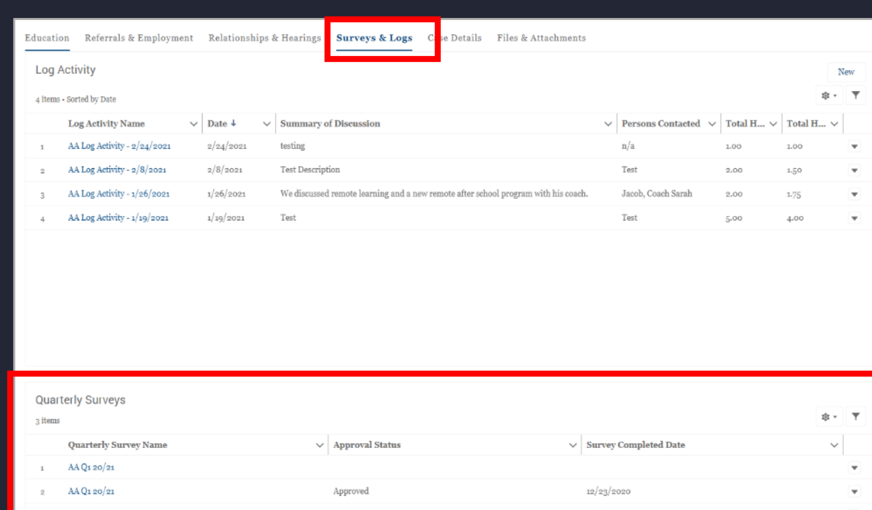
Each month, you will receive an email from AdvocateLink@sfcasa.org with a link to your surveys. Certain questions will not be required for those serving youth 15 years of age and younger



TIPS AND TRICKS

To view information regarding Submitted Quarterly Surveys, navigate to the Case assigned to you and click on the *Surveys & Logs* tab.

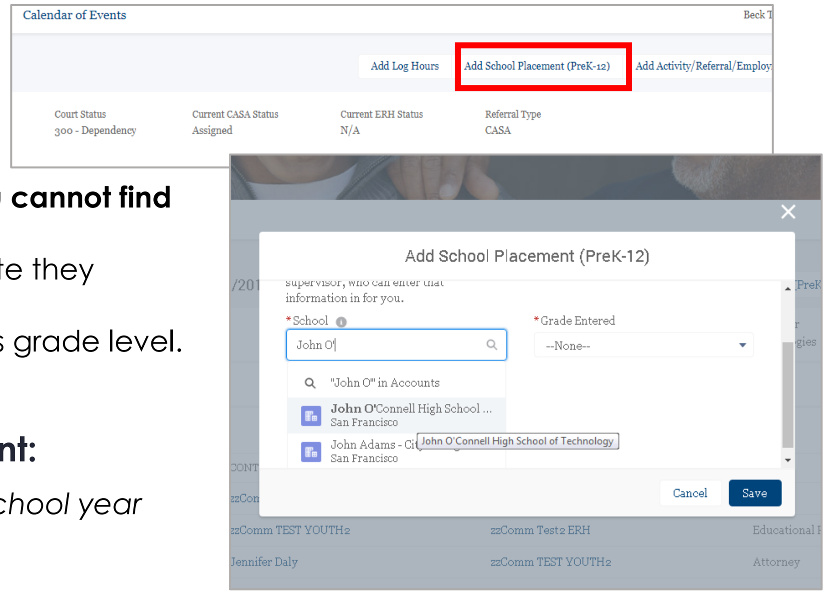
Scroll down to the Quarterly Surveys section and click on the Survey Name to view the Survey status, link, and results.



Updating Youth Education Information

Add/Change PreK-12 School Placement:

This must be done at the beginning of every school year and when your dependent changes schools.



1. Navigate to your assigned case.
2. Click *Add School Placement (PreK-12)* button at top right.
3. Under "School", enter the school name
   NOTE: notify your Case Supervisor if you cannot find this school.
4. Under "Placement Date", enter the date they enrolled at this school.
5. Under "Grade Entered", enter student's grade level.
6. Click *Save*.

Add/Change College School Placement:

This must be done at the beginning of every school year and when your dependent changes schools.

1. Navigate to your assigned case.
2. Click the down arrow at top right and select *Add School Placement (College)*.
3. Under "School", enter the school name
   NOTE: notify your Case Supervisor if you cannot find this school.
4. Under "Placement Date", enter the date they enrolled at this school (or the first day of school year for subsequent years at same school).
5. Under "Grade Entered", enter student's grade level. (If you have questions regarding current grade level, please contact your Case Supervisor)
6. Click *Save*.

TIPS AND TRICKS

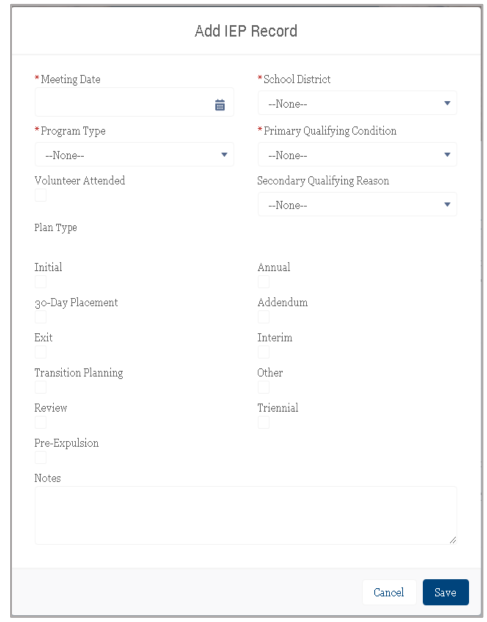
This information must be approved by your Case Supervisor. Once submitted, it cannot be edited until your Case Supervisor has reviewed it.

Add IEP—Part 1:

If your youth has an IEP meeting, you will enter this information. Please request a copy of the IEP from the school. If you are having difficulty understanding the IEP document to input the record, please contact your Case Supervisor.

1. Navigate to your assigned case.
2. Click the down arrow at top right and select *Add IEP Record*.
3. Under "Meeting Date", enter the date of the IEP meeting.
4. Under "Program Type", select the appropriate category. (This one can be tricky—contact your Case Supervisor if you are unclear)
5. Under "School District", select the school district for the plan.
6. Under "Primary Qualifying Condition", please select appropriate category.

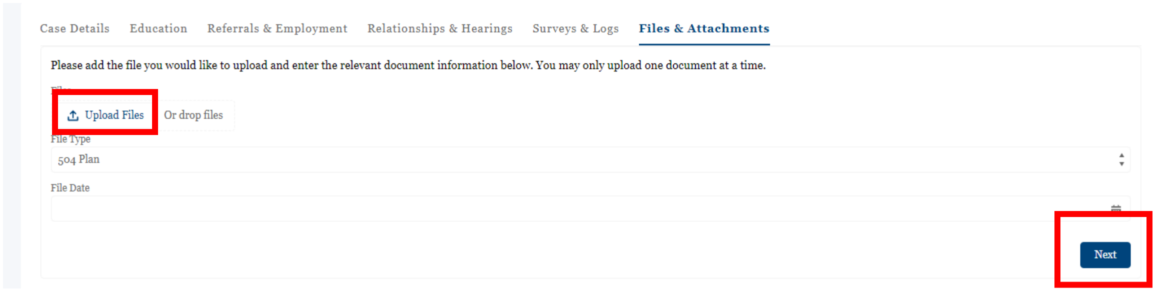
7. If the youth has two qualifications, please indicate the "Secondary Qualifying Reason" in the dropdown.
8. If you attended the meeting (even by phone), check the box for "Volunteer Attended".
9. Under "Plan Type", please check all of the appropriate options indicated on the IEP document.
10. Be sure to use the "Notes" section to include any additional information related to the meeting/plan. You will be able to see these notes later.
11. Click *Save*.



Add IEP — Part 2:

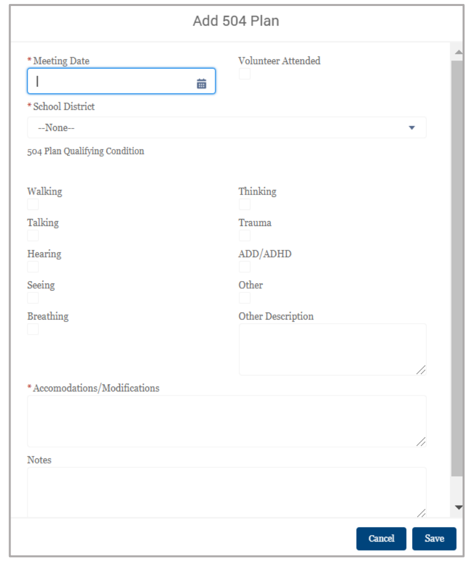
To accompany the IEP record, please request a copy directly from the school. We will be uploading these documents into Salesforce for record keeping on the *Files & Attachments* tab. Your Case Supervisor will not approve the IEP/IFSP record until this is uploaded.

1. If there is a photo of the youth on the document, please block out the photo before uploading.
2. Save the file (email or upload from scan) on your computer.
3. Navigate to your assigned case and then to the *Files & Attachments* tab.
4. Drag and drop a file OR select "Upload File" to select the file you want to upload.



   a. ***NOTE: You can only upload one file at a time.***
   b. Once the file completes uploading, click "Done"
5. Chose the File Type IEP in the dropdown menu
6. Enter the Date for the file. This should be the date when the document applies, for example, the date of the IEP.
7. Click "Next"
8. Click "Finish" to complete uploading the file.
9. NOTE: You can repeat steps 3-7 to upload additional files
10. To see the newly updated file, refresh your screen. It will now appear in the "Files" section below the upload portion.

Add 504 Plan—Part 1:



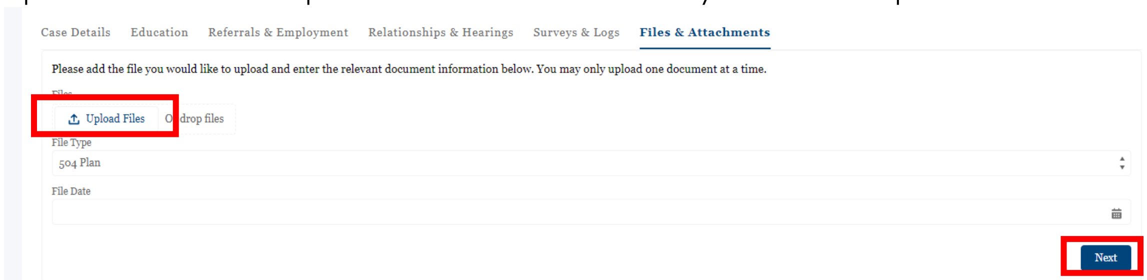
If your youth has a 504 Plan meeting, you will enter this information. Please request a copy of the 504 Plan from the school.

1. Navigate to your assigned case.
2. Click on the arrow next to *Add Activity/Referral/Employment* and select *Add 504 Plan* button at top right.
3. Under "Meeting Date", enter the date of the 504 Plan meeting.
4. Under "School District", select the school district for the plan. (If you are having trouble with finding this, contact your Case Supervisor).
5. If you attended the meeting (even by phone), check the box for "Volunteer Attended".
6. In the qualifications, select and/or write out all the qualifications indicated in the 504 Plan document.
7. Under "Accommodations/Modifications", please list out all indicated on the 504 Plan document.
8. Feel free to use the "Notes" section to include any additional information related to the meeting/plan. You will be able to see these notes later.
9. Click *Save*.

Add 504 Plan—Part 2:

To accompany the 504 Plan record, please request a copy directly from the school. We will be uploading these documents into Salesforce for record keeping on the *Case-Related Information* tab and your Case Supervisor will not approve the 504 Plan record until this is uploaded.

1. If there is a photo of the youth on the document, please block out the photo before uploading.
2. Save the file (email or upload from scan) on your computer.
3. Navigate to your assigned case and then to the *Files & Attachments* tab. Click *Upload Files*
4. Drag and drop a file OR select "Upload File" to select the file you want to upload.

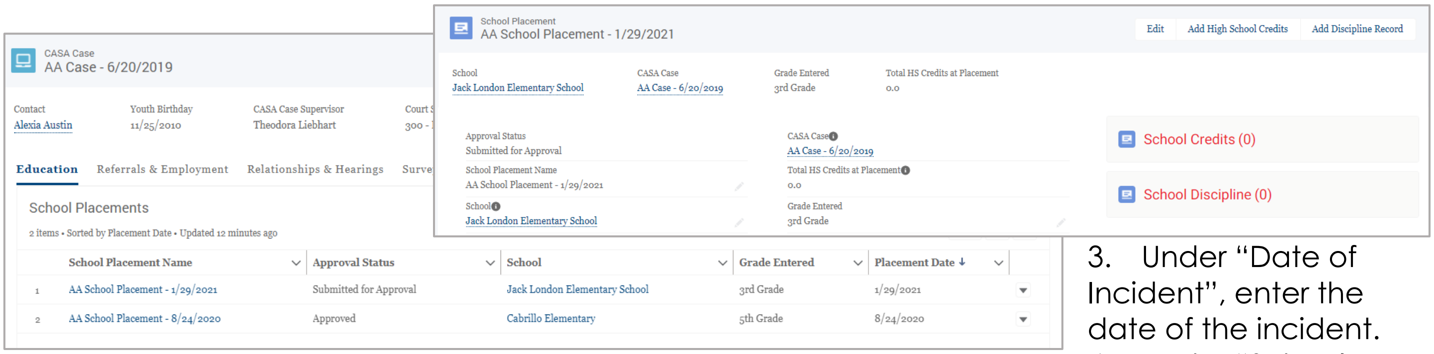


   a. ***NOTE: You can only upload one file at a time.***
   b. Once the file completes uploading, click "Done"
5. Chose the File Type 504 in the dropdown menu
6. Enter the Date for the file. This should be the date when the document applies, for example, the date of the 504.
7. Click "Next"
8. Click "Finish" to complete uploading the file.
9. NOTE: You can repeat steps 3-7 to upload additional files
10. To see the newly updated file, refresh your screen. It will now appear in the "Files" section below the upload portion.

Add Discipline Record (PreK-12 only)—Part 1:

When learning your youth has been suspended, recommended for a manifestation determination hearing (special education), or recommended for expulsion, you will enter this information.

1. Navigate to the youth's case and select the *Education* tab. Click on the *School Placement Name* (NOT the actual school name which will take you to the school account not tied to the youth)
2. Click *Add Discipline Record* button at top right.

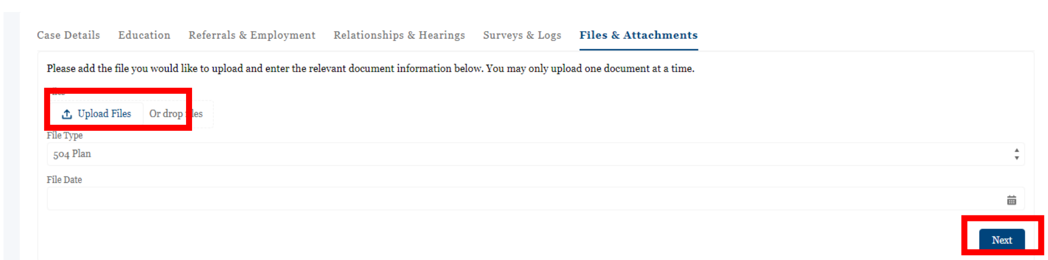


3. Under "Date of Incident", enter the date of the incident.
4. Under "School Days Missed", enter the amount of school days the school determined they could not attend. If this was an in-school suspension, you will enter "O."
5. Under "Discipline Type", select the appropriate category.
6. In the reasons section, select all that apply according to the report from the school.
7. If the youth has been suspended, enter the "Date Return to School".
8. If the youth has been recommended for expulsion or a manifestation determination, enter the "Hearing Date".
9. If the youth has been recommended for expulsion or manifestation determination, enter the "Outcome" of the hearing.
10. Click *Save*.

Add Discipline Record (PreK-12 only)—Part 2:

To accompany the discipline record, please request copies of the incident, suspension, expulsion, and/or manifestation report(s) directly from the school. We will be uploading these documents into Salesforce for record keeping on the *Case-Related Information* tab.

1. If there is a photo of the youth on the document, please block out the photo before uploading.
2. Save the file (email or upload from scan) on your computer.
3. Navigate to your assigned case and then to the *Files & Attachments* tab. Click *Add Files*



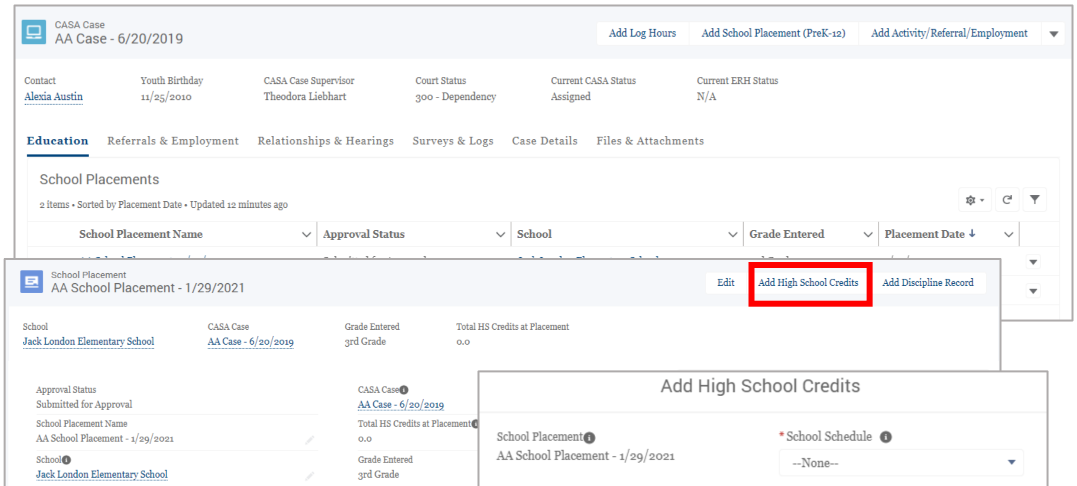
4. Drag and drop a file OR select "Upload File" to select the file you want to upload.
    a. ***NOTE: You can only upload one file at a time.***
    b. Once the file completes uploading, click "Done"
5. Chose the File Type 504 in the dropdown menu
6. Enter the Date for the file. This should be the date when the document applies, for example, the date of the 504.

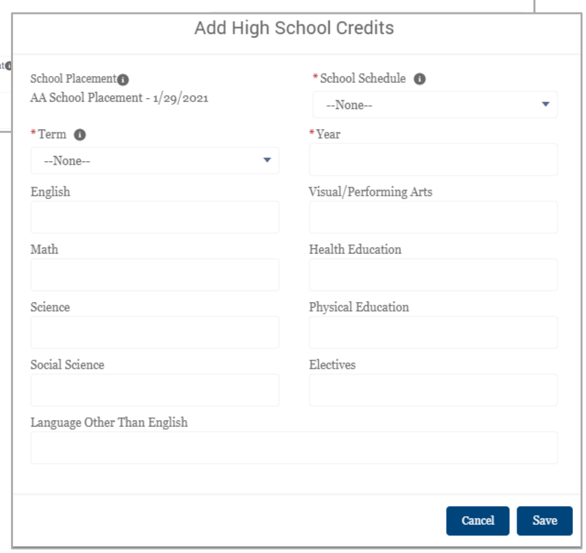
7. Click "Next"
8. Click "Finish" to complete uploading the file.
9. NOTE: You can repeat steps 3-7 to upload additional files
10. To see the newly updated file, refresh your screen. It will now appear in the "Files" section below the upload portion.

Add High School Credits—Part 1:

This only applies to advocates serving youth in high school, and should be entered at the end of every semester/quarter or when a youth transfers schools. This information can be acquired for high school students by asking the school for a copy of the most recent transcript. Case Supervisors are available to assist with understanding credits on transcripts!

1. Navigate to the youth's case and select the *Education* tab. Click on the *School Placement Name* (NOT the actual school name which will take you to the school account not tied to the youth)
2. Click the button *Add High School Credits*
3. Under "Term", select the appropriate option for the credits you are reporting.
4. Under "School Schedule", select the option the school uses (most high schools use semester).
5. Under "Year" should be when the term started. Ex: 9/2017-1/2018 semester= "Fall 2017".
6. In the subject areas, enter the number of credits earned during that time period (contact your Case Supervisor for assistance, if needed!).
7. Click *Save*.



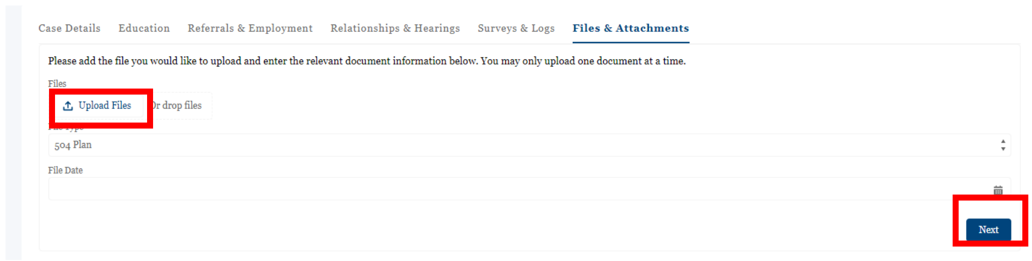


Add High School Credits—Part 2:

To accompany the high school credit record, we will be uploading their transcripts and/or report cards into Salesforce for record keeping on the *Case-Related Information* tab. Your Case Supervisor will not approve the School Credit record until this is uploaded.

1. If there is a photo of the youth on the document, please block out the photo before uploading.
2. Save the file (email or upload from scan) on your computer.
3. Navigate to to the *Files & Attachments* tab.

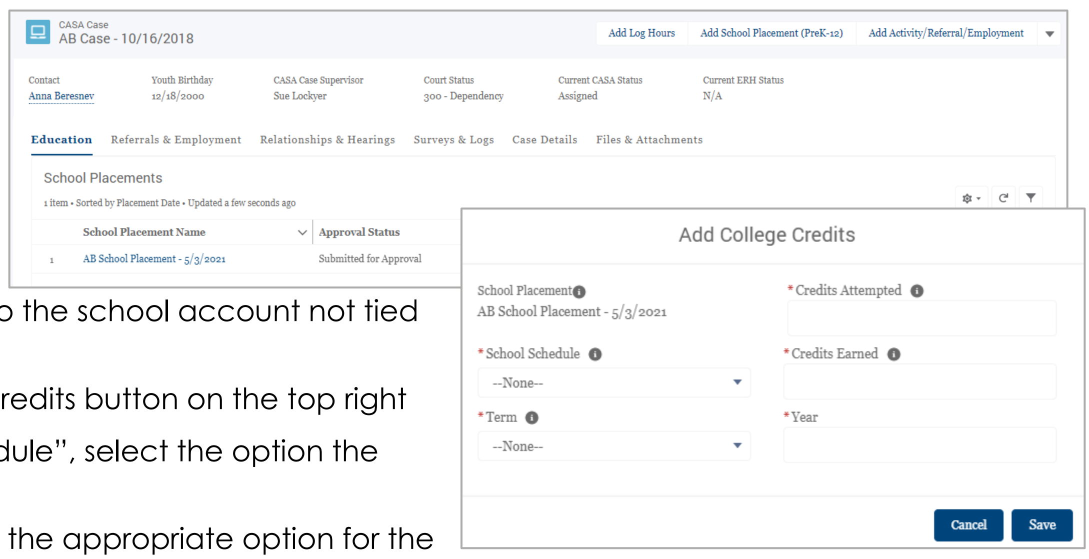
4. Click *Upload Files*, select the file from your computer, and click *Open*.
5. Chose the File Type Transcript in the dropdown menu
6. Enter the Date for the file. This should be the date when the document applies, for example, the date of the transcript.
7. Click “Next”
8. Click “Finish” to complete uploading the file.
9. NOTE: You can repeat steps 3-7 to upload additional files
10. To see the newly updated file, refresh your screen. It will now appear in the “Files” section below the upload portion.



Add College Credits—Part 1:

This only applies to advocates serving youth in college and should be entered at the end of every semester/quarter. For college students, please ask them if they would be willing to share their recent grades with you. Case Supervisors are available to assist with understanding credits on transcripts!

1. Navigate to the youth’s case and select the Education tab. Click on the School Placement Name (NOT the actual school name which will take you to the school account not tied to the youth)
2. Click Add College Credits button on the top right
3. Under “School Schedule”, select the option the school uses.
4. Under “Term”, select the appropriate option for the credits you are reporting.
5. Under “Year” should be when the term started. Ex: 9/2017-1/2018 semester= “Fall 2017”.
6. Under “Credits Attempted”, enter the amount of credits they are reported as attempting that term.
7. Under “Credits Earned”, enter the amount of credits they successfully completed during that term.
8. Click Save.

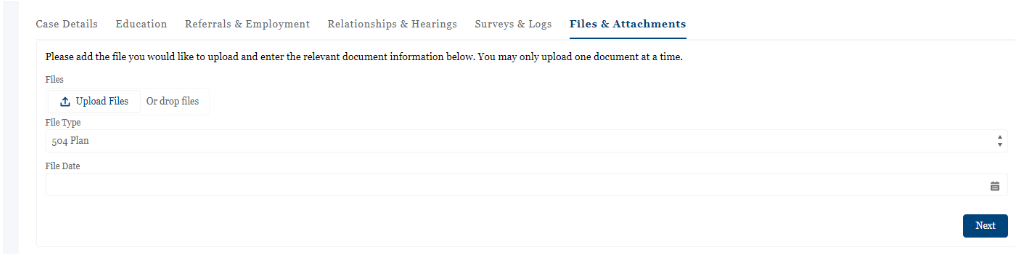


Add College Credits—Part 2:

To accompany the college credit record, we will be uploading their transcripts and/or report cards into Salesforce for record keeping on the *Case-Related Information* tab. Your Case Supervisor will not approve the School Credit record until this is uploaded.

1. If there is a photo of the youth on the document, please block out the photo before uploading.

2. Save the file (email or upload from scan) on your computer.
3. Navigate to to the *Files & Attachments* tab.



4. Click *Upload Files*, select the file from your computer, and click *Open*.
5. Chose the File Type Transcript in the dropdown menu
6. Enter the Date for the file. This should be the date when the document applies, for example, the date of the transcript.
7. Click “Next”
8. Click “Finish” to complete uploading the file.
9. NOTE: You can repeat steps 3-7 to upload additional files
10. To see the newly updated file, refresh your screen. It will now appear in the “Files” section below the upload portion.

How To: Submit Funding Requests via AL

Summary

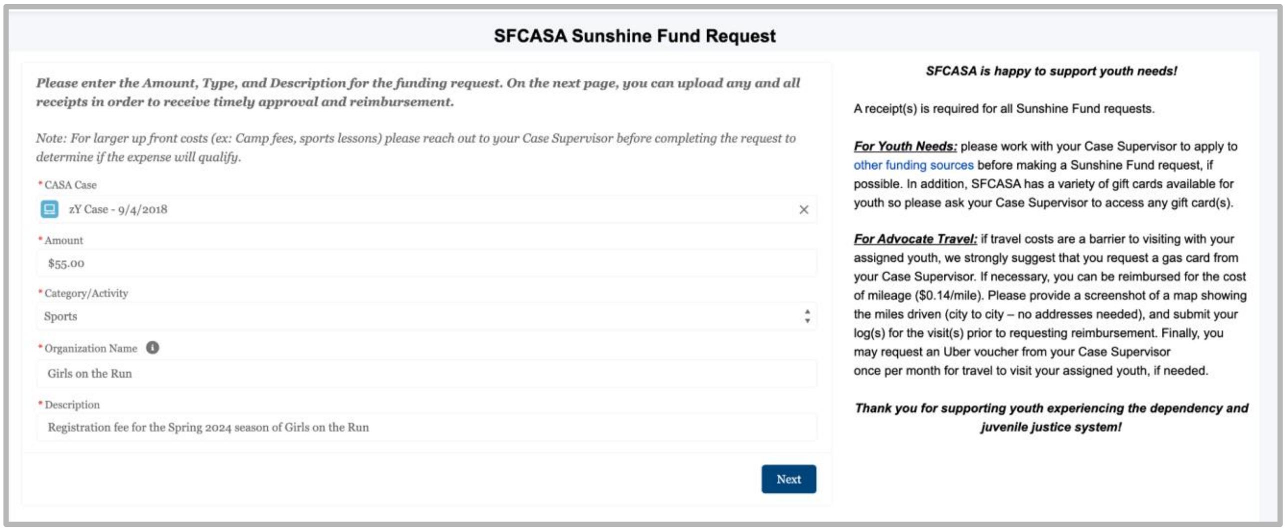
This guide outlines the steps for a CASA to submit a request for Funding reimbursement \ in AL (Advocate Link). This is the preferred process over emailing this information to your Supervisor or Staff directly.

Steps

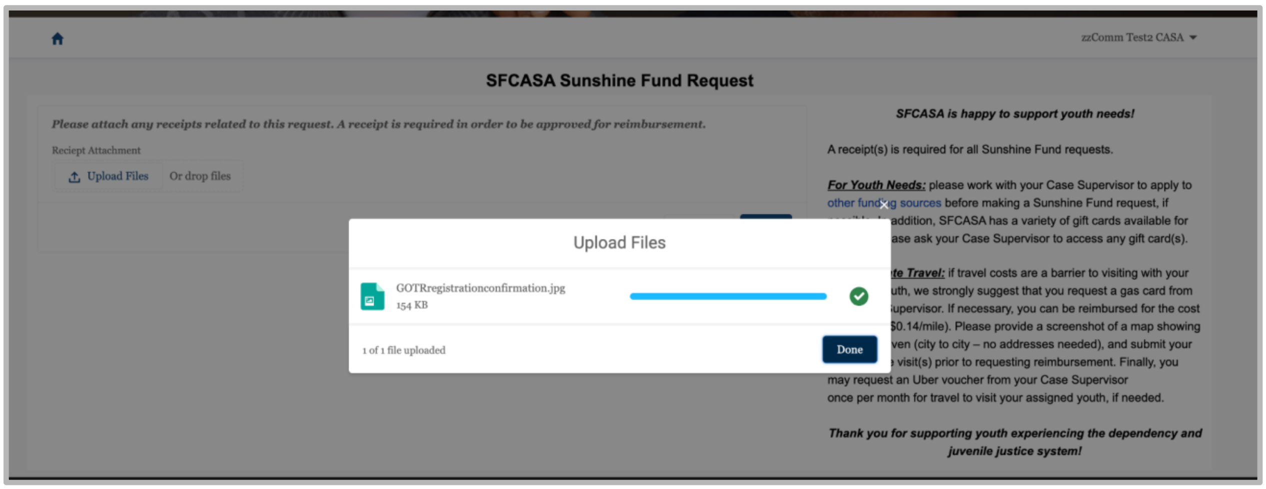
1. Log in to AL, and click on the “Funding Requests” shortcut tile.

2. At the top right of the page, there is a section to submit information about the Funding request.
    a. Select your Youth’s Case
    b. The total amount you spent (may be multiple receipts)
    c. The Category of the funding
    d. The name of the Organization / place of the activity
    e. A description of the cost

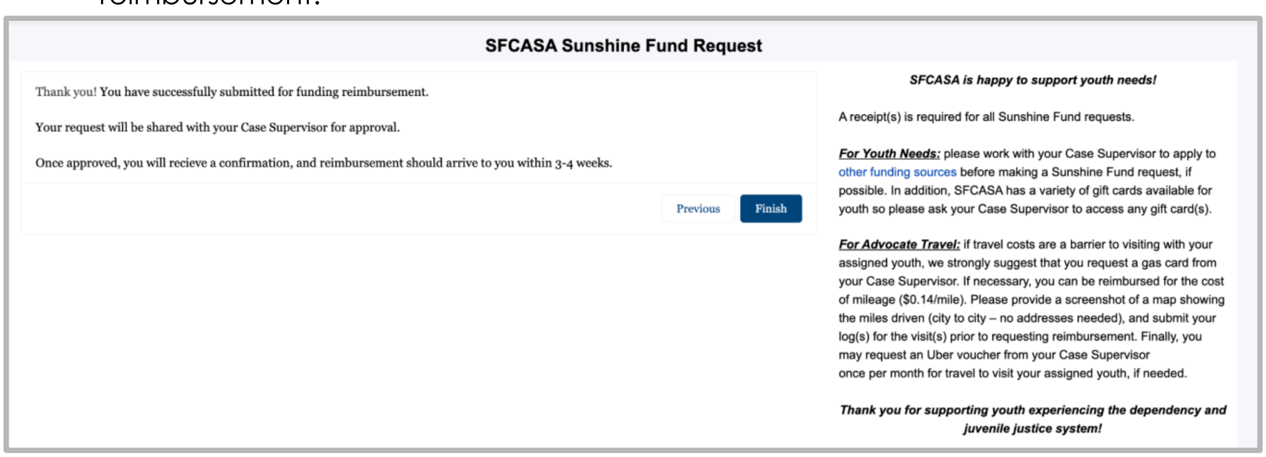
    Click “Next once completed



3. On the next screen, use the "upload files" button or drag and drop the receipts you want to upload. You will see an "Upload Files" popup on the screen. Wait until all are uploaded in the pop up then click "Done". Click "Next".



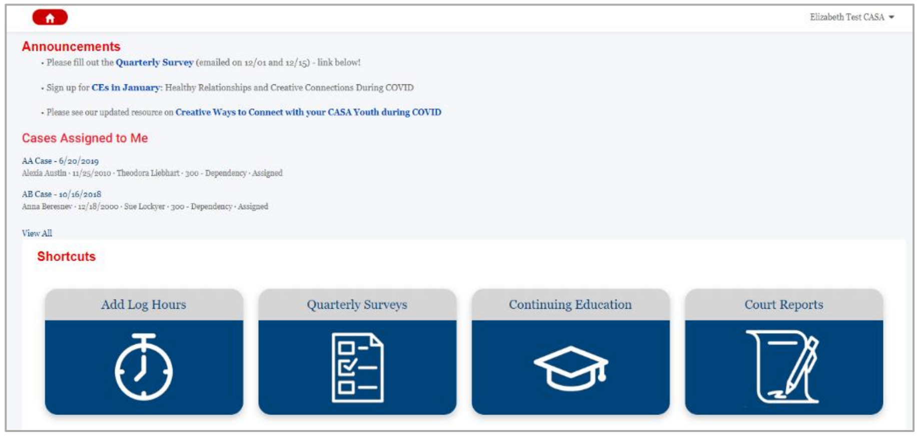
4. Your request is now submitted, and will be routed to your Case Supervisor, then the program team, automatically for review and approval. Once approved, it will be sent to finance for reimbursement.



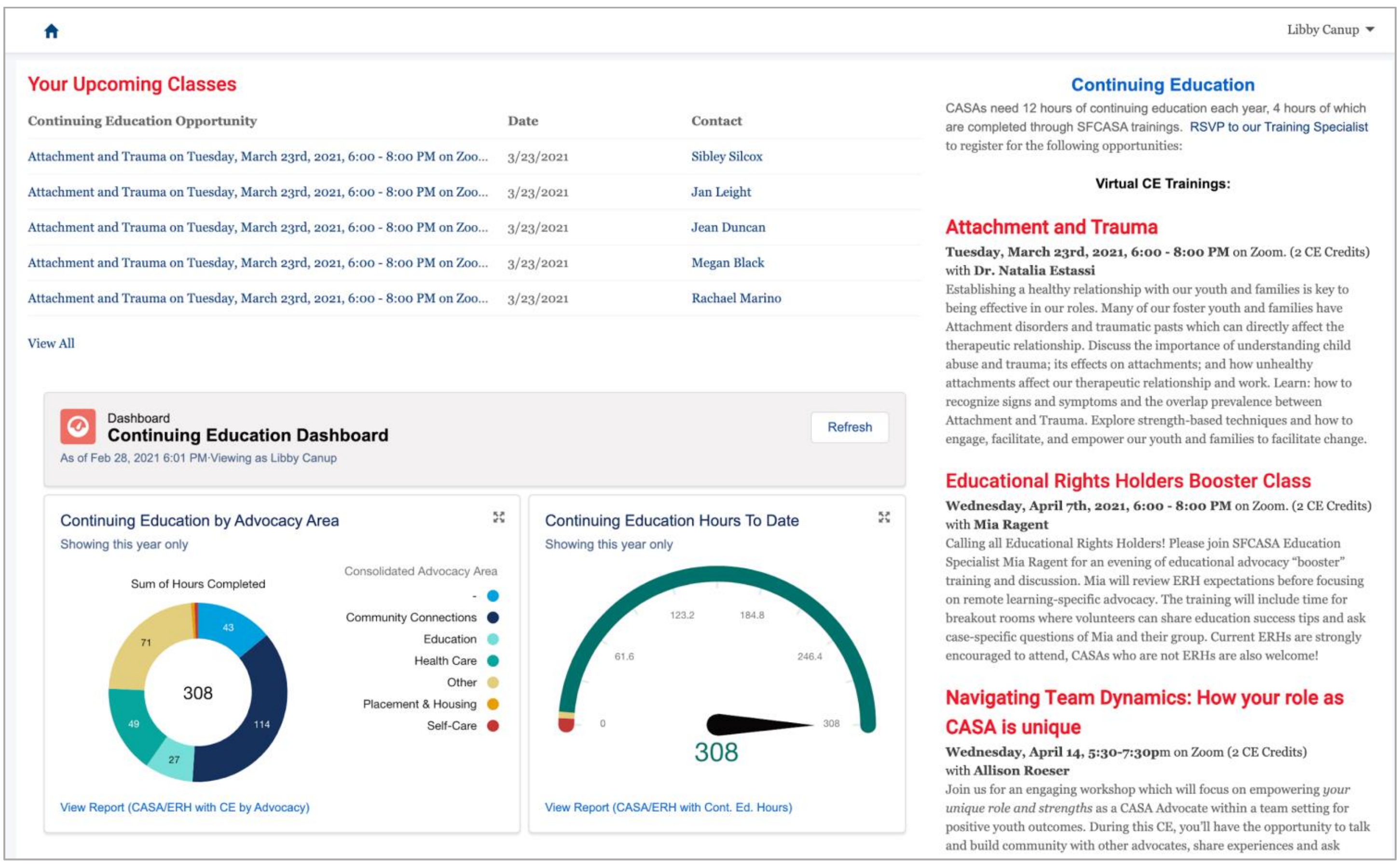
5. To submit another request, click "Finish" to re-start the flow.

Continuing Education Progress

Overview



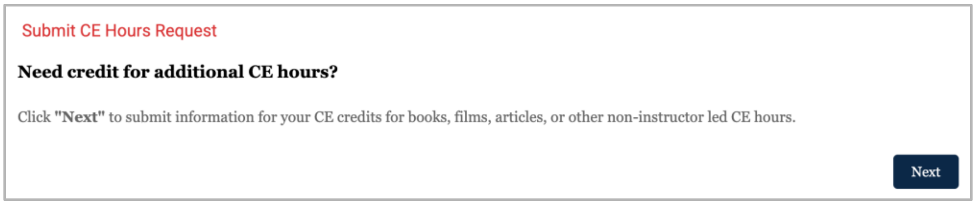
1. Click on Continuing Education on your home page.
2. The top portion shows you a list of upcoming courses which you are registered for.
3. The pie graph will show you the total continuing education opportunities that you have completed and/or signed up for this calendar year, grouped by advocacy area.
4. The barometer graph titled Continuing Education Hours To Date will show your progress toward reaching your requirement of 12 hours of CE for the calendar year.
5. The text on the right will show upcoming CE classes offered by SFCASA, as well as any other training opportunities we want to highlight.



Submit Self-Study CE Hours for Credit

NEW March 2022: This is the preferred process over emailing this information to your Supervisor or SF CASA Staff directly.

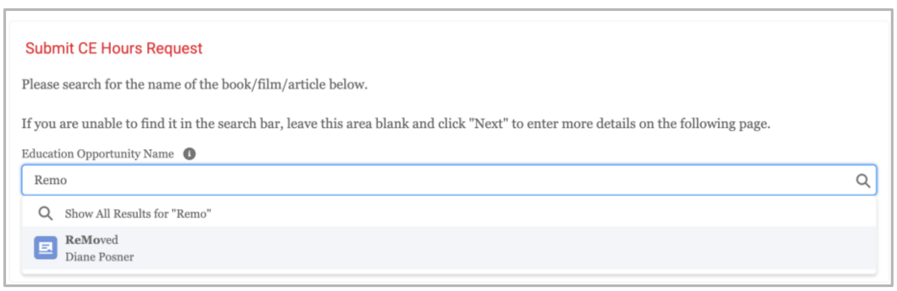
1. Log in to AL, and click on the "Continuing Education" shortcut tile.
2. At the top of the page, notice the new "Submit CE Hours Request" section. Click "Next" to start the process of submitting hours.



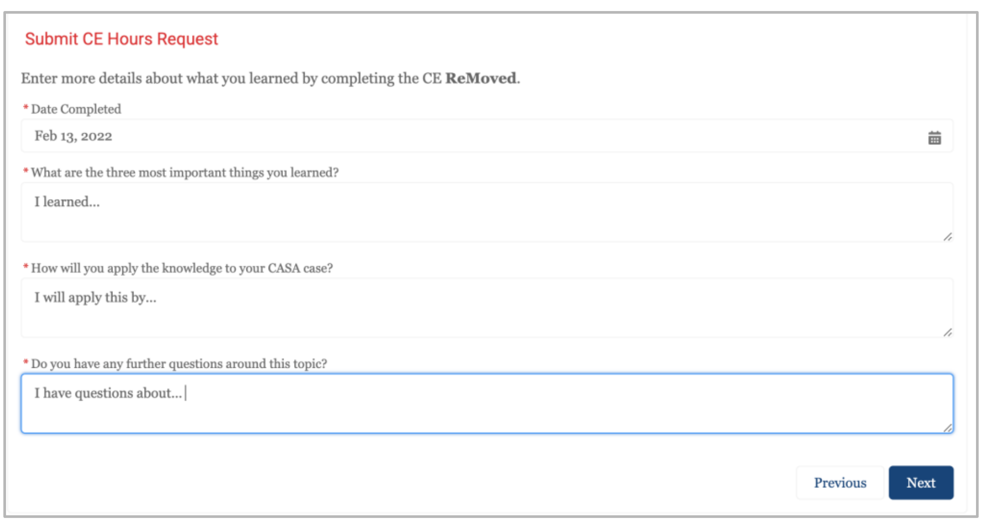
3. Search in the box on the next page for the name of the book/article/webinar/etc. you are requesting credit for.
   a. If you are able to locate a match, click on it to select, and follow the steps in the "Existing CE Content" section below.
   b. If you are unable to locate a match, follow the steps in the "New CE Content" section below.

Existing CE Content

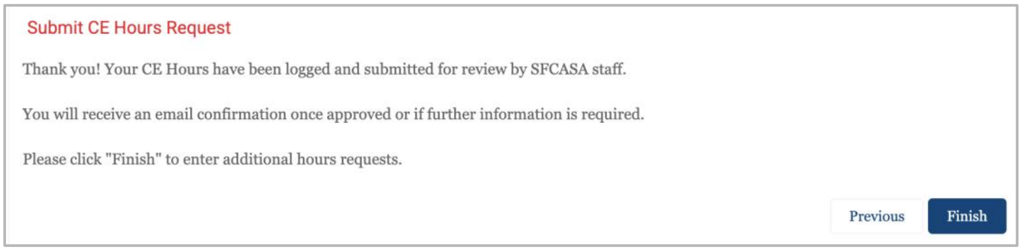
1. Select the existing CE in the dropdown, and click "Next"



2. On the next screen, enter the Date you completed the activity, as well as the 3 reflection questions. Click "Next".



3. Your request is now submitted, and will be routed to your Case Supervisor automatically for review and approval.


Submit CE Hours Request

Thank you! Your CE Hours have been logged and submitted for review by SFCASA staff.

You will receive an email confirmation once approved or if further information is required.

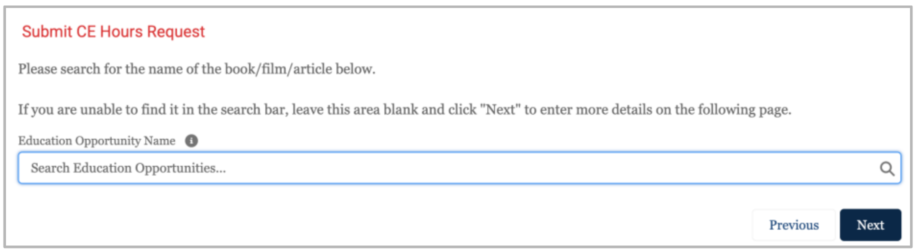
Please click "Finish" to enter additional hours requests.

Previous Finish

4. Once approved, you will see the hours reflected in your CE Hours to Date dashboard in AL.
5. To submit another request, click "Finish" to re-start the flow.

New CE Content

1. Skip the lookup screen if you are unable to locate a match by leaving the search bar blank, and clicking "Next".


Submit CE Hours Request

Please search for the name of the book/film/article below.

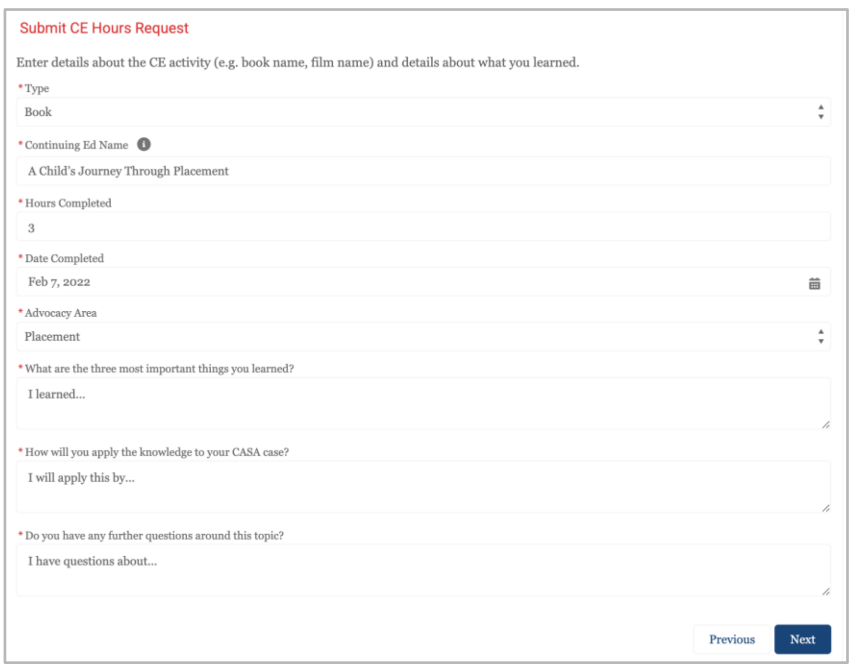
If you are unable to find it in the search bar, leave this area blank and click "Next" to enter more details on the following page.

Education Opportunity Name

Search Education Opportunities...

Previous Next

2. On the next screen, enter the type of CE (book, article, etc.), Name of the CE, Date you completed the activity, number of hours, primary Advocacy Area, as well as the 3 reflection questions. Click "Next".


Submit CE Hours Request

Enter details about the CE activity (e.g. book name, film name) and details about what you learned.

*Type

Book

*Continuing Ed Name

A Child's Journey Through Placement

*Hours Completed

3

*Date Completed

Feb 7, 2022

*Advocacy Area

Placement

*What are the three most important things you learned?

I learned...

*How will you apply the knowledge to your CASA case?

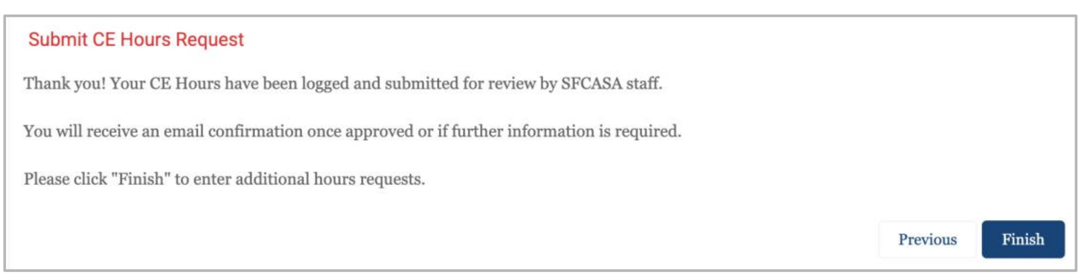
I will apply this by...

*Do you have any further questions around this topic?

I have questions about...

Previous Next

3. Your request is now submitted, and will be routed to your Case Supervisor automatically for review and approval.


Submit CE Hours Request

Thank you! Your CE Hours have been logged and submitted for review by SFCASA staff.

You will receive an email confirmation once approved or if further information is required.

Please click "Finish" to enter additional hours requests.

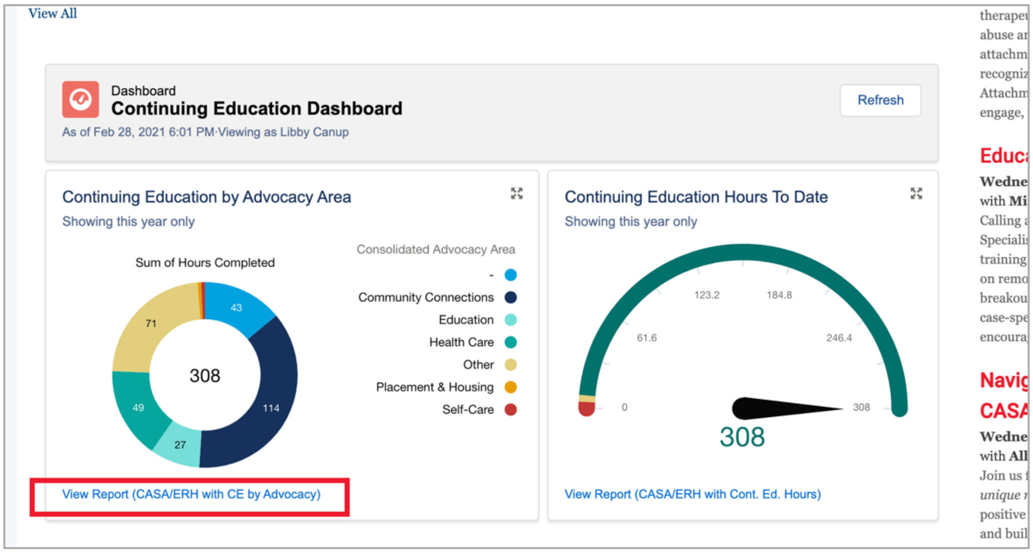
Previous Finish

4. Once approved, you will see the hours reflected in your CE Hours to Date dashboard in AL.

5. To submit another request, click "Finish" to re-start the flow.

View CEs you have completed/signed up for this year

1. Click on View Report (CASA/ERH with CE by Advocacy) underneath the pie chart. The report will open up.
2. At the bottom of the report, you will see your Continuing Education classes grouped by Advocacy Area.



TIPS AND TRICKS

If you completed a one-off training with an outside agency, the Continuing Education Opportunity will be listed under a generic name, like Online Training or Film/Documentary and the specific title of the opportunity will appear in the Notes column.

The CEs that you've signed up for will also be listed here and will have a number listed for hours completed. However, this will be removed from your record if you do not attend the CE opportunity.

SFCASA Advocacy Areas, Definitions and Examples

Community Connections

Youth experiences caring and supportive adult and peer relationships in their natural community; youth identifies and pursues personal interests; and youth participates in related prosocial activities.

Examples of relationships: relatives, peers, friends' families, teachers, spiritual communities, neighborhood groups, recreational/arts/cultural/athletic communities, etc.

Examples of prosocial pursuits: skateboarding, soccer, playing a musical instrument/singing, coding, theater, cooking, summer camps, etc.

Education

Youth is on track to advance grade levels; plans exist for youth to achieve educational goals with appropriate supports; youth has access to and utilizes academic and non-academic supports in school; youth participates in school clubs or activities.

Examples: Youth advances a grade level; youth's Individualized Education Programs (IEPs) and/or 504 Plans take place as needed and required by law; youth begins to understand and explore the link between education and vocational training/career; upon moving placements, youth is quickly enrolled in a new school or youth maintains their school of origin; youth joins school club or sports team.

Healthcare

Youth has access to and receives preventative and acute-needs healthcare to maintain positive physical, mental, and behavioral health.

Examples: Annual physicals, regular dental care, and vision screenings/care as needed; access to mental and behavioral health services; consistent, culturally humble, and timely care for both preventative and acute healthcare needs; youth voice and choice considered for services and providers; maintenance of health insurance and other resources as appropriate.

Placement

Youth is in an appropriate placement for their level of need; youth is involved in placement and housing decisions as developmentally appropriate; and youth's voice is integral to home placement options other than long-term foster care.

- Examples: Youth participates or their preferences are presented and considered in Child and Family Team (CFT) meetings and other conversations about both short- and long-term placement; NMD understands requirements for housing programs; appropriate support and tools are provided to youth and caregiver to maintain placement of preference; for youth ages

Independent Living Skills (ages 16+)

Youth is supported to achieve their educational and/or career goals while learning and practicing independent living skills (related to their housing, healthcare, and personal finances.

- Examples: Youth is engaged with an Independent Living Skills program; youth prepares for employment; youth has an internship or job; youth has a bank account and practices budgeting; youth practices time management skills; youth understands the difference between needs and wants and prioritizes accordingly; youth tours college campuses and/or vocational training options; youth prepares for independent living through finding and maintaining a home where they pay rent.