

CHAPTER 8

TECHNOLOGY AND PERFORMANCE MANAGEMENT



1. Introduction
2. Hardware / Software Requirements and Resources
3. COMET

1. INTRODUCTION

Technology can be a powerful tool to assist us in providing excellent advocacy for the children we serve through CASA programs in New York State. It presents the opportunity to prove what we do and how well we do it, as well as what drives our mission.

Performance management is the art and science of collecting, measuring and managing the data of our work. It is increasingly essential to our operations. The public financial and ethical failures of both private and nonprofit institutions over the past few years created a new standard of accountability and transparency for all. Protecting the public trust is a core survival issue. Today, non profits are facing shrinking finances for nonprofits from corporations, individuals and foundations; an increasing demand for services and declining public revenues; and heightened scrutiny. Increasingly, stakeholders as well as funders are asking for sophisticated data collection and management.

Accurate data depicts what works well and what could use improvement. It demonstrates to our funders, whether individual, corporate, or government, that their investment is paying off and deserves re-investment. Our partners increasingly rely on data collected, managed and measured with sophisticated technology to determine their investments.

With each dollar invested in CASA programs, we have a responsibility and a business opportunity. Our investors (funders, donors) entrust us with their money and their faith that, with integrity and credibility, we will carry out the mission they have chosen to support. Running a non profit organization is different from running a business only in the source of the revenue: instead of customers or clients paying for services, our funders pay us to provide services to others. Being able to demonstrate the quality and quantity of our product with a strong performance management system will encourage further investment. So how do we do this?

As anyone who has hesitated to learn to use email or the internet will tell you, once any fears of something new and different are overcome, these tools can become very valuable and easy to use, ultimately, saving a great deal of time and effort once the user develops a level of comfort and competency.



It is critical to plan for and implement your technological resources just as you would your human or fiscal resources. A gap in your program's technological resources, whether in hardware, software or implementation, will be costly. Consider, too, the often unseen costs associated with pulling the "accidental techie" away from their "real" assignments. It is advisable to have at least one person, whether staff, volunteer, or board member, who is highly skilled in

this arena and able to provide professional assistance. There is always the option of paying a professional Information Technology specialist if you have carefully weighed the fiscal implications.

Increasingly, we will all be dependent on electronic means of communication. There are some basic “netiquette” rules to follow:

- 1) Emails intended for one individual should not be copied or forwarded to another without the original author’s permission.
- 2) Use the “blind copy” when using individual’s email address in a group message so you are not inadvertently sharing someone’s personal email account without their permission.
- 3) Take care that many email programs automatically copy previous emails on a reply, so you may inadvertently be sharing discussions or information that was intended to be private or that we simply do not have someone’s permission to forward.
- 4) Emails can serve the purpose of recording a conversation in a way that allows documenting information or retrieving this information at a later date. However, this also means these can develop a life of their own, showing up in an inopportune time or place.
- 5) Emails can also serve to include a number of individuals in a discussion so you do not need to repeat the conversations.
- 6) Give thought before hitting “reply all” that everyone on an email needs or should have the information you are sending. It can save time and energy to “reply all” to include people in a discussion. Conversely, it can unnecessarily clog people’s email boxes or share information you did not intend to share with someone.
- 7) Listservs are set up in different ways. For some, replying will send the email to the entire listserv; in other cases, just to the host. Check the intended recipient to make sure you are communicating with the right entity.
- 8) Acknowledge receipt of emails as quickly as possible. Sometimes emails do vanish, and this helps you know that the intended recipient has received the information.
- 9) Spam filters will sometimes automatically send emails to your “spam” folder if the sender’s email is not recognized. Periodically check your spam folder to make sure you are not missing critical emails. The sender sometimes, but not always, will receive a message that the email has not gone through. This will sometimes happen if your spam filter recognized a subject line it deems inappropriate.
- 10) Be mindful of sending or opening attachments from unrecognized sources as they may contain viruses or objectionable material.
- 11) Take great care of what you email, forward along, or search for on your work computer. Follow your agency’s policies regarding appropriate use.
- 12) The tone of emails can mis-communicate your intent. We tend to be more conversational in email, but humor or a casual comment may be misconstrued.

As email becomes more common place, it can be a positive tool for communication but one of which you should be very mindful and careful.

As technology evolves, more social media will be available. We have blogs, twitters, texting and other means that not only are ways of communicating with individuals but may be available to anyone with access to the internet. The above rules are good guidelines to follow when using any electronic communication.

2. HARDWARE / SOFTWARE REQUIREMENTS AND RESOURCES

To facilitate your work with CASA's partners, the basic minimum hardware requirements include:

- Pentium 4 (3.06 GHz)
- Hard Disk Drive: 7,200 RPM; 10+ GB capacity or greater
- RAM: 512 MB or greater will allow true multi-tasking
- CD / DVD Drive: A 40x (or higher)
- 17-inch monitor
- Printer (to print reports and labels)
- Windows 2000 operating system, or higher
- Microsoft Office 2000 Professional or higher
- Internet Connection (High speed bandwidth is strongly recommended, not dial-up)

These are minimal requirements. Any opportunity to secure bigger, better, faster technology is encouraged, recognizing that most technology products have a shelf life of 45 days. Historically, technology grants are readily available.

UCS, CASANYS and The National CASA Association employ the "Microsoft Office" software package, including Word, Excel, Access, Outlook, PowerPoint and Publisher in their collaborations with local programs. Each send newsletters via email and, if they have not already, are moving toward online reporting.

It is often necessary for UCS or CASANYS to gather detailed information as quickly as possible. Important information regarding ongoing or potential funding streams or programmatic issues is distributed via email. It is important that you check your email regularly or designate someone in your agency to do so in your absence.

A high-speed internet connection together with the "Microsoft Office" package will significantly ease your interface with the entire network. It is also very strongly recommended that you have virus protection and system security software.

The site www.techsoup.org is an excellent resource, providing software and training to nonprofits at deep discounts. For instance, one Microsoft Office license costs \$20 compared to the retail \$799. In addition to free, online technology information, resources, and support on the TechSoup.org site, product donation services of TechSoup Stock (www.techsoup.org/stock) give nonprofits in North America access to software and hardware from renowned corporate and nonprofit partners. Be aware of the guidelines to register as a 501(c)3 and the donation guidelines as outlined on the site, particularly with Microsoft products. These also speak to the need for a strong technology plan for your program.

In 1998, National CASA introduced COMET (Case Outcome Management and Evaluation Tool), developed exclusively for CASA programs and built on a Microsoft Access database. COMET may be downloaded from www.casanet.org at no charge for member programs. You must have Microsoft Access to use COMET. (See Page 5, Technical Specifications, for more information.)

A Statewide CASA Data Committee was convened by UCS in 2008 including representatives of the State Association and local CASA programs to discuss data needs and challenges, and to make a recommendation to UCS about the use of resources moving forward. The Committee's unanimous recommendation was to move toward a web-based data collection

system that would meet the needs of local directors, the State Association, UCS and National CASA/OJJDP. This would include mechanisms to conduct outcome evaluations for individual CASA programs as well as to measure the effectiveness of the CASA program statewide.

In the interim, UCS and CASANYS have worked together to determine what elements of COMET should be standardized as well as outcomes that could be tracked and reported statewide. Our goals included simplifying your life by offering enhanced consistency of definitions of information categories; enhanced capability to compare data statewide; evaluation of outcomes both locally and statewide; and increased ability to assist programs in providing meaningful and consistent data to your funders and constituents.

Standardizing definitions and terms in COMET provides consistency throughout the state on data fields deemed significant to funders and Stakeholders. Care was taken throughout the process to only standardize those fields necessary to provide statewide data that would allow for improved outcome measures and clarity between CASA programs. Having standardized fields will facilitate the transfer to a web-based system, when that occurs.

Local CASA programs are strongly encouraged to use the COMET database, implementing the statewide standardized data entry guidelines set forth in this guide. It is important that you do not have COMET customized further without collaborating with UCS and CASANYS; any further modifications may compromise the statewide standardization and ability to generate necessary reports.

COMET is currently the data management tool of choice. As we move toward a web based system, you will be invited to participate in the process and be kept apprised.

3. COMET

The COMET section of this chapter is a guide to the utilization of COMET in order to make most effective use of your time while providing standardized data collection and reports. It is intended for use by local programs as a companion guide to NCASAA COMET Technical Assistance, which can be accessed at the following website: <http://www.casenet.org/program-services/comet/index.htm>

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COMET Introduction

Adapted from www.casanet.org

Designed by National CASA specifically for CASA/GAL programs, *Comet*, CASA Outcomes, Management and Evaluation Tool, is a child-centered database which maintains and tracks information on abused and neglected children and the volunteers who advocate for them in the court system. It may be customized to meet local needs. National CASA has done periodic updates to COMET; check www.casanet.org for the latest version and contact their office if you have any questions.

COMET tracks information on each child in seven main areas:

1. Demographics, siblings, and initial case information
2. Family members' addresses, phones, and issues/ concerns
3. Case worker, attorney, and other "interested people" such as teachers, doctors, therapists
4. Hearings, including status, dates, outcomes
5. Case plan, including permanent plan goal, placements, services, and visitations
6. Volunteer activities and reports
7. Case closing, including reason and final placement.

COMET tracks information on volunteers in five main areas:

1. Address/ phone, demographics, employment and current status
2. Screening, including references, background checks
3. Initial and in-service training
4. Preferences, interests, and skills
5. Assignment history.

Technical Recommendations

COMET is a Microsoft Access database application. This means it is designed in and for Microsoft Access2000, Access XP and/or Access 2003 on the Windows operating platform. It is recommended that you run COMET in Windows 2000 or higher operating platform.

COMET runs on either a single computer or on a network, and COMET files can be password protected through the network for security.

To run Comet a computer with the following recommended hardware and software specifications:

- Pentium 4 (3.06 GHz)
- Hard Disk Drive: 7,200 RPM; 10+ GB capacity or greater
- RAM: 512 MB will allow true multi-tasking
- CD / DVD Drive: A 40x (or higher)
- 17-inch Monitor
- Printer (to print reports and labels)
- Windows 2000 operating system, or higher
- Microsoft Office 2000 Professional or higher
- Internet Connection (High bandwidth is recommended)

Online training classes are offered on a regular and continual basis by National CASA. See www.casanet.org for more information.

COMET 101



Shown above is the Main Menu, or interface you will see when you open COMET from your desktop. Any of the buttons down the left will lead you to your data, whether you wish to enter data, perform maintenance, or summon reports.

COMET is designed to capture an enormous amount of information regarding your CASA cases. COMET can potentially contain all your case notes but will not capture the case orders, petitions, or collateral reports, so CASA programs will always be required to maintain hard copy files in a locked cabinet.

Experience has shown that when employing a database like COMET, it is often best to determine what data you are going to need back out in order to determine how much to enter. There is no need to enter more than you will need to summon from it. Most users have found the most economic application is to enter your child and family demographics; volunteer demographics, screening and training data; and petition and hearing data and outcomes.

Data included on the UCS/CASANYS Case Information Forms, Volunteer Activity Forms and Hearing Information Form is *all* the information that is currently necessary to track in COMET for standardized reporting purposes. For instance, COMET may ask you to record a parent's address and phone numbers; if you have them in your written case record, there is no need to enter them in COMET as they will not be part of any report that will be requested of you. However, parents' demographics are necessary data that will be tracked and reported.

The following contents will guide you through a basic but effective implementation:

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As with any database, move from field to field with the Tab key. Movement through the fields automatically saves the data you have entered. There is no need to take additional steps to save your data. In COMET, families are often referred to as “Groups.”

I. Customizing Lookup Tables Lookup Tables or Lists provide the choices of standard data, such as case outcomes. Some may be customized upon entry. For instance, if you are typing in a zip code you have not previously used, COMET will ask if you wish to add that to the Zip Code list. Most, however, require a preliminary set-up of the information that will appear in drop-down lists. This can be done at any later point, but will simplify your data entry if it is completed first.

From the **Main Menu** click on **Maintenance**; on the left, under **List Maintenance** click **Edit Maintenance Tables**. The list of tables appears; click double click to choose the one you wish to edit. Activate the editing tool by clicking in the left hand column of the list you wish to edit.

Begin with List (04) Case Removal Reasons. Type in Dismissed. When complete, simply click on another list in the left hand column.

In List (08) Disability Categories, add PTSD, ADD/ADHD, Lead Poisoning, Developmental, FAS

In List (10) add Family Treatment Court, Integrated Domestic Violence Court; delete Supreme Court and Juvenile Court.

In List (18) Petition Types, add Abuse/Neglect; delete Dependency, Delinquency, Mediation; and change Family Dispute to Family Offense.

Continue as necessary, customizing the following tables for statewide standardized data collection as on pages 18-20:

(01) Allegation/Abuse Categories	(10) Hearing Locations	(27) Volunteer Categories
(03) Case Referral Types	(11) Hearing Outcome Categories	(29) Volunteer Court Activities
(04) Case Removal Reasons	(12) Hearing Status Categories	(30) Volunteer Referral Categories
(05) Criminal Check Agencies	(13) Hearing Type Categories	(31) Volunteer Status Categories
(06) Disability Categories	(18) Petition Categories	(32) Discharge Reasons
(08) Family Relationships	(26) Volunteer Activities	(34) Ethnicity Categories

See List Maintenance Tables on Pages 21-23 for list content.

II. Related Persons Initial use of COMET will be most effective if you first enter “related persons” in your data. Those may include Volunteers, Caseworkers, Law Guardians, and Judges.

You do not have to enter every person from each of those directories. It may be easiest to enter those with whom you have the most cases. At any later point, when you have a case with a related person not already in the database, you may add them to the list.

After that initial data is complete, you will be able to enter a case, beginning with one child, that child’s demographics, relationships, issues, hearings, and siblings.

a) Add a Volunteer

On the **Main Menu** click on the **Volunteers/Advocates** button.

On the **Volunteer Finder** screen click on the **New Volunteer** button. The Quick Add Volunteer screen will pop up. On the **Quick Add Volunteer** screen you can fill in all the information at this time or just the two required fields – First and Last names - and enter the rest of the information at a later time.

With your volunteer’s file and application at hand, you should be able to complete the rest of the data as seen in the fields below. (Note for most programs, Date Accepted is not an important field.)

On the main **Volunteer Information** Screen, buttons across the top access the following data:

Volunteer Information, Screening, Training, Skills & Interests, Preferences, Case Activity, Case Report, History and Notes

Tabs on the next line access **Personal Information, Volunteer Status, Demographics, and Employment Information.**

Volunteer data that **needs** to be in COMET:

- Name
- Gender
- DOB
- Race
- Employment status
- Education level

Filling in this data at once will provide complete reports when requested.

Volunteer data that is **helpful to have** in COMET:

- *Address*
- *Home phone number*
- *Work phone number*
- *E-mail address*
- *Fax number*
- *Emergency phone, Emergency contact*
- *Primary and secondary language*
- *Source of volunteer (Referred by)*
- Skills and Interests
- And, if you have a large pool of volunteers, preferences regarding children’s age, gender, disabilities, case issues.

b) **Add Caseworker**

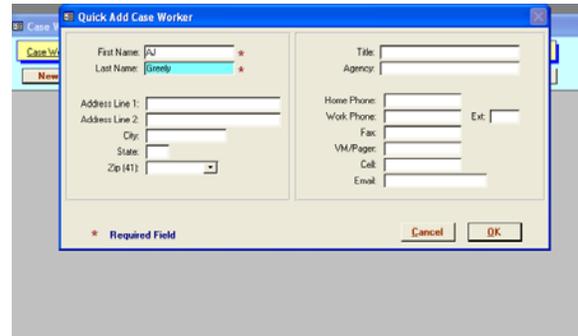
On the **Main Menu** click on the Case Workers button.

On the **Case Worker Information** screen click on the **New Case Worker** button. →



The **Quick Add Case Worker** screen opens.

You can fill in all the information on this screen at this time, or just the two required fields – **First and Last Names**. Having the **phone number** handy at this point is helpful as it will appear on your Master Log.



The rest of the information can be entered at a later date, *or not at all*, since it is not likely to be summoned in a report. The exception would be if you wish to later generate mailing labels from COMET, you will want to enter mailing addresses.

Click **OK** when complete.

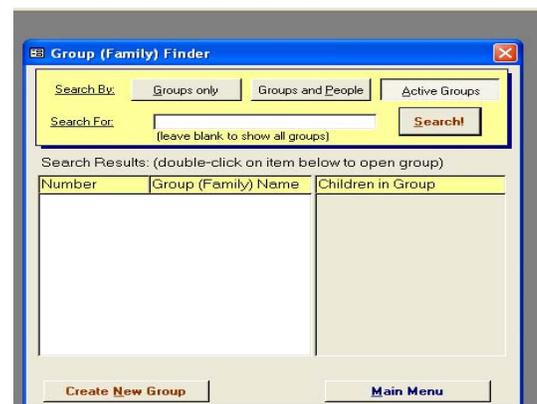
c) **Add Attorneys or Judges**

Beginning with the appropriate button on the Main Menu, follow same steps as “Add Case Worker” to enter information on Attorneys or Judges. Again, First and Last Names and phone numbers are important. You may want to enter mailing addresses if you wish to later generate mailing labels from COMET. This can also be completed at any later point.

III. Add a Case/Child

On the **Main Menu** click on the Group/Child Information Button

On the **Group Finder** screen click on the **Create New Group** button.

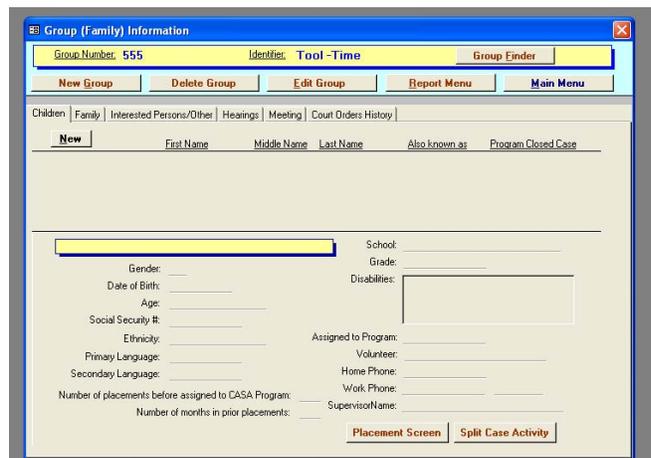


On the **Quick Add Group** screen enter the **Group Number**. Your **UCS Family File number** is well suited for use here. You may also want to hyphenate the first initial of the judge's last name, so that with one glance you know which judge hears this case (for example, you family file number is 1234. If it's under Judge Jones, it would be 1234-J). The Group Number can include any alpha or numerical combination but must be a unique number for each group.



Enter **Group Name**. This could be the children's last name or mother's last name, etc. If you wish to use children's last names and there are more than one in the sibling group, you may separate them by slash (Davis/Jones/Smith) or simply choose the one you determine to refer to the case. **Click OK**.

The **Group (Family) Information** <>**Children** screen appears; click on the **New** button.



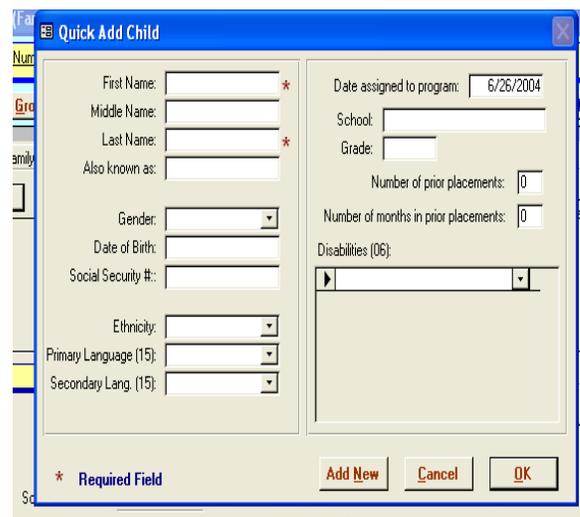
The **Quick Add Child** screen opens. You can fill in all the information on this screen at this time, or just the two required fields – First and Last Names. **The more information you are able to enter at this point, the better** for your record keeping and report generation. Any of the rest of the information you may not have at the moment can be entered at a later date.

You will want to have:

- First and Last Name
- Gender
- DOB
- Ethnicity
- Date case assigned to program
- Number of prior placements
- Number of months in prior placements
- Disabilities

Social Security number, language, grade and school are optional; you may find them helpful.

Click OK when complete.



Once a child's name has been entered into the group, you can add and edit information for that child by clicking on the **GoTo** button to the left of the child's first name




Clicking the **GoTo** button (above) opens the **Child Information** screen which offers buttons that open to complete data entry information for this individual child. Buttons include Child Information, Case Information, Supervisor, Family, Petition, Re-Abuse, Interested Persons, Case Worker, Attorney, Volunteer, Activity and Closing.

*After completing the demographic data on one child on a new case, enter the following data by clicking on the tabs on the fourth line of the **Child Information** screen:*

- 1) **Case information:** who assigned to the CASA program; date of last permanency determination; status of case at assignment, etc.
- 2) **Supervisor:** assign case supervisor here.
- 3) **Family Member:** demographics, relationships, concerns regarding and disabilities of each family member. You may include grandparents, aunts, uncles, custodial older siblings, parents' partners, or siblings' other parents. This section allows for each child in a case to have a different relationship, if appropriate, with each family member listed.
- 4) **Petition:** petition numbers, dates, type of case, allegations, person allegations made against, hearings, placements etc.
- 5) **Caseworker:** offers a drop-down list of those you have previously entered.
- 6) **Attorney:** offers a drop-down list of those you have previously entered.

7) **Volunteer**: offers a drop-down list of those you have previously entered. Important to enter date assigned.

For additional children in the same case, you may now click “**New Child**” button on the Child Information Screen.

Fill in the new child’s demographics; click “**copy info from other child**” to copy any of the information in items 1-6 above (case, supervisor, family member, petition, caseworker, attorney and volunteer information). You may “**select all**” or select particular categories from which to copy. If appropriate, go to the Family Members tab to clarify relationships that may be different from other siblings.

Repeat for each child in the case.

As the case progresses, you will use the other tabs on the Child Information screen to enter:

8) **Re-abuse**: new petitions and allegations (may also be entered into original Petitions tab with dates). This data should be entered in one tab (Petitions) or the other (Re-abuse), though it does not matter which, as it arises in the case in order to thoroughly track allegations.

9) **Interested persons**: unnecessary for reports. You may choose to use this to enter other contact information, but it will not serve any reporting purposes.

10) **Activity**: this is one place to enter volunteer’s case activity. It may also be entered under the Volunteers/Advocates Button from the Main Menu, using the “Activity” tab at the top of the screen. *(This can be useful if you sit down to enter your volunteers’ activity at one time on a regular basis. Instead of moving from case to case, you simply move from volunteer to volunteer. Entering from the Activity tab under Volunteers/Advocates button from the main menu also permits splitting activity between the children on the case. This function is not available if entering activity under one child’s data in the case record.)*

While you may choose to enter individual activities on each case for each volunteer, it can be an effective and economic use of your time to summarize the activities for each time period. For standardized data collection purposes, we suggest the summarizing activities by these types:

1 Reviewed case files	11 DSS contacted	21 Mental Health personnel contacted
2 CASA supervisor contacted	12 Facilitated DSS staffing transition	22 Mental Health needs identified
3 Child visited out of court	13 Facilitated communications	23 Other service providers contacted
4 Child’s social, cultural or recreational needs identified	14 Foster care review / permanency planning meeting	24 Secured services ordered / not yet provided
5 Biological parents contacted	15 Healthcare personnel contacted	25 Attorney for Child contacted
6 Visitation needs identified	16 Healthcare needs identified	26 Other relatives contacted
7 Foster parents contacted	17 Education personnel contacted	27 Incident of re-abuse/neglect identified
8 Foster parent needs identified	18 Educational needs identified	28 Researched alternative placement
9 Attended court	19 Developmental personnel contacted	29 Wrote / edited court reports
10 Attended Family Treatment Court Team Meeting	20 Developmental needs identified	30 Other

The above table will be used for statewide standardized data collection and outcome measurement.

Most activity may be entered through the name of one child on the case, or you may choose to employ the “Split Case Activity” button. This will divide the activity entry equally among the children on the case. Either way should result in the same activity totals for cases and volunteers.

This assumes you collect volunteer activity data from your volunteers on a weekly, monthly, or bi-monthly basis. Longer periods benefit from breaking the data down into monthly or bi-monthly sub-totals for entries. This allows you, at a glance, to gather information on standards and best practice such as how many times your volunteers have visited their children in one month and how many court appearances have been attended.

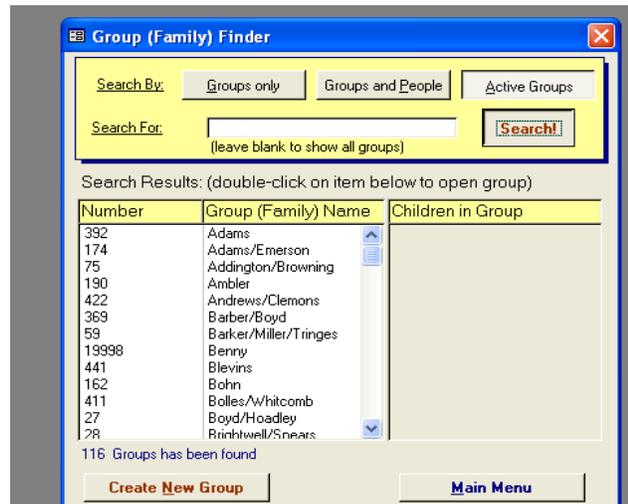
11) Hearings:

On the **Main Menu** click on the **Group/Child Information Button**

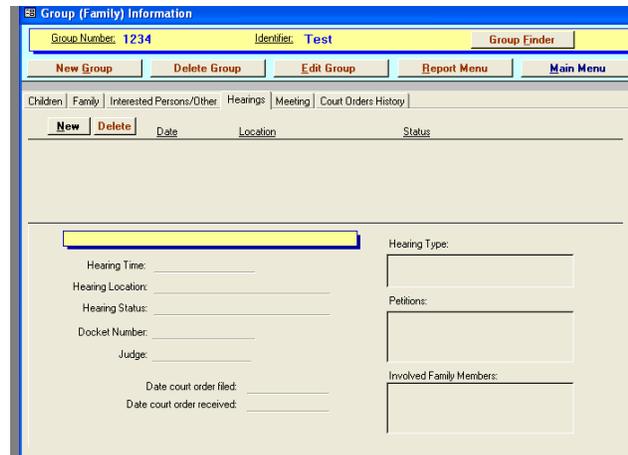
On the **Group Finder** screen which appears, click on the **Search Active Groups** button. This shows a list of your active cases.

In order to add a Hearing, you must have the child, group and petition information in your COMET database.

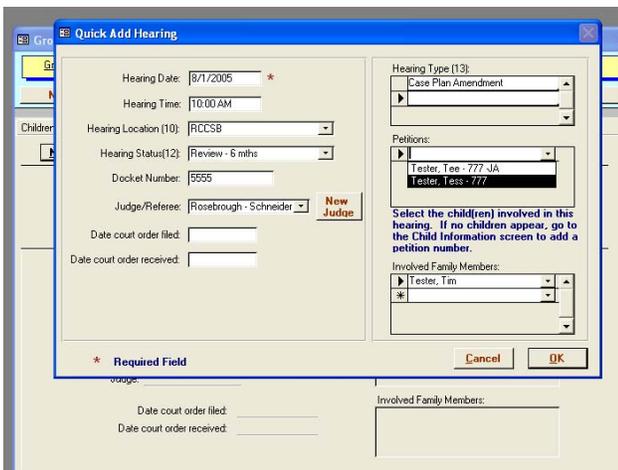
Select a group from the list by a double click.



On the **Group Information** screen click on **Hearings Tab**



On the **Hearings Information** screen click on **New** button. →



The **Quick Add Hearing** Screen opens.

You must fill in the **Hearing Date** (Red Asterisk) in order to add a hearing. You can enter location, status, docket number, affiliate a judge, Hearing Type, and involved family members. *In order to affiliate a child and a volunteer to hearing you must select a **Petition** from the dropdown list. Click OK.*

Click the **GoTo** button to enter **Hearing Information** screen of the hearing you just recorded.

Click **Volunteer Input** button to enter Volunteer information as it pertains to the hearing. This tab will allow a count of outcomes for reporting purposes.

12) Placements On the **Main Menu** click on the Group/Child Information button. On the **Group Finder** screen click on the **Search** Active Groups button. (In Order to add a placement, you must have added a child and group information to your COMET database)

Select a group from the list of Groups by highlighting and double clicking.

On the **Group Information** screen click on the **Placement Screen** button on bottom of Group (Family) information Screen. (Note you are entering placement for Child noted by black arrow next to **Go To** button)

The **Child Placement History Screen** opens. This opens up the history of placements for child entered into COMET. To add new Placement click on **New Placement** Button Select Placement from Dropdown list – Enter Placement Date, Placement Reason. Click **OK**.

Once the placement has been added a history of Placement and the Facility information will also be displayed.

Click the **Back** button to go back to the Group (Family) Information Screen.

*Note: If you are attempting to enter a child into a facility not in COMET. Click on **New Facility** button and add facility before entering child into placement.*

13) Case closing information: Enter date court closed case, date program closed case, reason for program closing, placement at closing, was CASA's permanent placement recommendation accepted. Notes window allows for comments which may be useful to briefly enter any additional status at closing information; or to record previous open/closing dates if a case is a re-assignment.

“**Close All Persons Associated With This Case**” button allows you to close the attorneys, supervisors, volunteers, and caseworkers assigned to this case (child) with one click. Note you must manually *close the case for each child* in the group. This can be done with the “copy info from another child” button on the Child Info screen.

Also upon closing a case, be sure to return to the Volunteer tab, enter the date the case closed and the reason for volunteer removal. (Usually, it will be Case Closed.)

IV. MAINTENANCE

The Maintenance button allows you to check inconsistent or missing data prior to running reports. It is highly recommended that you take a few minutes to perform maintenance prior to generating any reports, especially if the data is intended for external use.

From the **Main Menu**, click the **Maintenance** button. The Maintenance Menu opens, with the following choices:

Check/Update Supervisor Closed Dates	Check Closed Dates
Check/Update Duplicate Supervisor Assignment	Check Child Demographics/Case Data
Check/Update Volunteer Closed Dates	Check Inconsistent Child Record Dates
Check/Update Attorney Closed Dates	Check Volunteer Assigned to Child Dates
Check/Update Case Worker Closed Dates	Check Volunteer Demographics/Dates
Check/Update Dates Child Assigned to Program	Check Assigned Date

Click on the button of the item you wish to check or update. A new window will appear listing any records with incomplete or inconsistent information. A blank yellow field will denote the data error. If immediately available, correct the record by filling in that data in that field. It will convert into the case record.

Or, at the lower left of the window you will see a “Print List” button, which will allow you to print the list of missing data which you can then gather from your case files. This may simplify data entry if you have a number of corrections to make at any given time.

V. REPORTS

COMET offers an extensive 182 potential reports summarizing data from 98 tables and several hundred built-in queries. It is likely you will find yourself using about 10-20% of the potential reports for most of your work.

From the **Main Menu**, click on the **Reports** button. At the top of the **Reports** screen, fill in the **date range** (dd/mm/yyyy) in both the **From and To** fields, indicating the time period for which you are summoning data. This could be a day, a week, a month, or a year, depending upon your application.

The reports screen is divided into the following seven tabs, each with multiple options within:

1. **All Volunteers:** aggregate data on all, assigned, new, available and discharged volunteers including demographics, activity, training summaries, activity, birthdays, etc.
2. **Volunteers/Supervisors:** individual data on list of children, cases, training history, outcomes, for volunteers and supervisors, etc.
3. **Closed/Current Cases:** aggregate data on new, active, closed, and assigned cases; master log and residency by zip code, etc.
4. **Group/Child:** individual data by child or family on case activity, services, family member information, contact sheets, etc.
5. **Other:** lists of attorneys, caseworkers, interested persons, etc.
6. **Placement/Outcomes:** aggregate data on placements, outcomes, history; generates OJJDP reports as well as Sections 3 and 4 of the Annual Survey.
7. **Mailing Labels:** generate individual envelopes or mailing label sheets for any category of related persons: volunteers, attorneys, caseworkers, judges, etc.

When the report appears on screen, clicking the magnifying glass allows a closer look. Reports may also be imported in to Microsoft Word by clicking the “**W**” icon at the top of the screen.

VI. BACKUP *From www.casenet.org*

It is critical to backup your COMET data on a regular basis. Backup instructions are as follows:

The CometDBV4.mdb file, which is the file that contains all the Comet data is the file you will need to backup. If you have used Comet Tools to build your own queries, you will also want to back up that file. You will not need to back up any other Comet files.

1. Before beginning the backup of Comet Data, open *CometV4* and view the Database File path at the bottom of the COMET Main Menu.

This will determine where your (**CometDBV4.mdb**) data file is stored. This file contains your case management data stored in COMET. If the path is **C:\CometV4\CometDBV4.mdb**, or your data file is stored in the CometV4 folder on the C: drive.

Close COMET and click on **my computer** icon or “explore” to see a windows directory of your files.

2. On the left side of the Exploring window, find the CometV4 folder (or the folder that is holding your **CometDBV4.mdb** data file) where the data file is stored. You may have to drag the center scroll bar to scroll up to the top of the directory of folders to see your CometV4 folder.
3. Double click on folder to Open the CometV4 folder (or the folder that is holding your **CometDBV4.mdb** data file) in your computer drive
4. Highlight the **CometDBV4.mdb** file and Select **Edit/Copy** from the top menu. The **CometDBV4.mdb** data file maybe too large to copy it directly to a floppy disk in the A:\drive. You can use either a CD burner (fairly standard on most new computers) or a Zip drive. You would need to follow instructions on copying files supplied with the burner or zip drive.
5. Select **Edit/Paste** from the top menu. You should see copy of your COMET Data. (**Copy of CometDBV4.mdb** file) I
6. Go to the drive to which you want to keep the backup. Ideally, this is a removable disk.
Paste the copied file(s) to the back up directory.

From the menu, choose Edit/Paste. Label the disk with the date of the backup.

It is a good idea to rotate back up disks so that you have at least two copies of the CometDBV4.mdb data file and to keep those disks offsite but in a locked file.

VII. PANIC: YOUR DATA IS GONE *From www.casanet.org*

If you are not seeing any data when you open Comet, you could have possibly lost the link to your data. If you see a **“The Required file ‘CometDBV4’ could not be found”** message when you open Comet, most likely you have lost the link to the main data file. Press OK and proceed with these instructions:

Instructions for re-linking *Comet* to your **CometDBV4.mdb** (data) file:

1. Open **COMETV4.mde**. On the *Comet* Main Menu click the **Change Path** button. The **Find new location of CometDBV4.mdb** window is displayed.
2. Use the drop-down button on the **Look in** box and/or the button to the right of the Look in box (“Up One level” button) to browse to the CometDBV4.mdb data file that is stored in the **CometV4** folder on your computer. Finding the data file can be the most difficult part of this exercise. You may want to look at the “Database File” on the Comet Main Menu on a computer that did not lose its link so that you can see the path to the shared data file.
3. Click on the **CometDBV4.mdb** file in the Comet Shared Data folder and click **Open**
4. The Database Main Menu will show at the bottom the linking process progress. Once links are complete a message will display:
"All Tables were linked successfully, Close and reopen Comet reopen Comet to complete changing path " when the database has been re-linked. Click **OK**.
5. Click the **CLOSE COMET** button to close *Comet* and then re-open *Comet* to refresh the database file path. You will see the new database file path on the *Comet* Main Menu.

If you are having difficulty re-linking *Comet*, contact *Comet* Technical Support for directions.

VIII. FAQ *From www.casanet.org*

1. I keep getting an error message when I try to type a new volunteer’s name in a dropdown box in the Child Information section.

Press the escape key to cancel your entry. You probably have learned that you can enter some new list items directly into the dropdown boxes. However, you must enter any new volunteers by clicking on the “New Volunteer” button above the volunteer dropdown box in the Volunteer tab in the Child Information section. In general, no new persons can be entered in the dropdown lists. You will be able to enter new list items only if you see a list number after the text box description.

2. Why are there no children appearing in the dropdown lists in my Hearing Information section? I know I entered the children in the Child Information section.

In Comet each hearing must be connected to a child’s petition. You must first enter the petition information in the Child Information section under the Petitions tab. Then, after the Hearing Information tab is filled out, go to the Involves tab in the Hearing section and make sure to select the family member involved in the hearing and the child or children involved in the hearing.

3. Why don’t I see the hearings I entered on the Upcoming Hearings report?

Each hearing in Comet must be connected to a child’s petition. Make sure to enter petition information in the Petitions tab in the Child Information section. Also, in the Hearing

information section under Involves information, make sure that the child's name and petition information are shown in the Involves tab. Upcoming hearings are also based on Hearings that are happening after today's date.

4. I am trying to assign a placement in a hearing to a child, but the child's name will not show up in the dropdown box.

Each hearing in Comet must be connected to a child's petition. Make sure to enter petition information in the Petitions tab in the Child Information section. In the Hearing information section under Involves information, make sure that the child's name and petition information are shown in the Involves tab. Once this information is entered into the hearing go back to the placement section and select the child from the dropdown box.

5. How can I re-open a child's case that was previously closed?

In Comet V4 has a feature a Re-Open Button on the Closing information screen. This button allows you to track a child's original opening and closing dates. For re-entering a child/group into your database, you may also want to enter the original opening and closing information into the notes sections. The new date that the child came back into the program will now show in the Case Information Screen along with the original date below. Some CASA/GAL programs also put an indicator like a number on the child's/group name to indicate they are a returning group.

6. How can I change the reports in the Report section in Comet?

It is not possible to change the reports in Comet but it is possible to export COMET reports to MS Word format. Just click on the "Publish it to MS Word" on the toolbar at the top.

7. I am trying to arrive at the total number of children served in a three year period including cases that were open during that time but are now closed. Can you lead me to the right screen or steps to do this?

Use the Child Demographics report under the Current/Closed cases tab.

1. Go to the Report Menu- select the Current Closed cases tab.
2. Enter in the range of time you want to see the children.
3. Then select the Child Demographics (by date) report - and select Active children button
4. Select Preview Summary report to see totals of children or select Preview Detail Report to see list of names.

8. When we run the "Demographics of Assigned Children" report (summary) it shows 177 children w/ volunteers for the year. When we run the report for "Annual Program Survey Section Four: Children" it shows 160 children served by program for the same time period. Why are we getting the difference? I thought these numbers would be the same.

Demographics for Assigned Children report will show all active children as assigned to volunteers during that date range. The Survey report is looking at only new children assigned to the program during that year or Date Range that were assigned to volunteers.

Additional assistance is available from National CASA at
1-877-266-3882 or
<http://www.casenet.org/program-services/comet/index.htm>
or cometta@nationalcasa.org

COMET List Maintenance Tables:

The lists itemized below have been modified to accommodate New York State practice, to standardize data collection and to assist with outcome measurement. It is important that your lists be customized to match the rest of the state. Many will simply require deleting inappropriate items; others will require addition or modification of the items in the list.

Be sure to edit your COMET lists to match those as printed below, particularly those marked♥:

(01) Allegation/Abuse Categories♥

- (03) Case Referral Types
- (04) Case Removal Reasons
- (05) Criminal Check Agencies
- (06) Disability Categories♥**
- (07) Family Concerns
- (08) Family Relationships

(10) Hearing Locations♥

- (11) Hearing Outcome Categories♥**
- (12) Hearing Status Categories
- (13) Hearing Type Categories
- (18) Petition Categories
- (26) Volunteer Activities♥**
- (27) Volunteer Categories

(29) Volunteer Court Activities♥

- (30) Volunteer Referral Categories
- (31) Volunteer Status Categories
- (32) Discharge Reasons
- (34) Ethnicity Categories

♥ **These categories are likely to be used for standardized outcome measurement.**

(01) Allegation/Abuse Categories♥

- Abandonment
- Educational Neglect
- Emotional Abuse
- Medical Neglect
- Physical Abuse
- Physical Neglect
- Sexual Abuse

(02) Case Closure Reasons

- Death of Child
- Child Turned 18/21
- Adopted
- Returned to Family
- Placed With Legal Guardians
- Child Ran Away
- Case Removed from Docket
- Case Transferred
- Family Moved
- CASA asked for removal
- Judge removed CASA

(03) Case Referral Types

- Judge
- Court Attorney Referee

(04) Case Removal Reasons

- Conflict of Interest
- Lost Interest
- Dismissed
- Case Closed

(05) Criminal Check Agencies

- Child Abuse-State Central Register
- Federal-Choicepoint
- Local
- CHRS-State Criminal
- Family Court
- Other

(06) Disability Categories♥

- Neurological
- Cardiac
- Cerebral Palsy
- Circulatory
- Respiratory
- Reactive
- Hearing
- Mental

- Psychological
- Learning
- PTSD
- ADD/ADHD
- Lead Poisoning
- Developmental
- FAS
- Substance abuse
- Vision
- Other

(07) Family Concerns

- Abused as Child
- Criminal History
- Economic
- Housing
- Mental Health
- Substance Abuse
- Domestic violence
- Rape victim
- Other

(08) Family Relationships

- Aunt
- Brother
- Father
- Father's Partner
- Guardian
- Maternal Grandfather
- Maternal Grandmother
- Mother
- Mother's Partner
- Parents
- Paternal Grandfather
- Paternal Grandmother
- Sister
- Stepfather
- Stepmother
- Stepbrother
- Stepsister
- Half-brother
- Half-sister
- Uncle
- Other

(09) Final Placement Types

- Detention Center
- Emergency Shelter
- Group Home
- Guardianship
- Hospital

- Independent Living
- Non Relative Adoption
- Non Relative Foster Care
- Relative Adoption
- Relative Placement
- Residential Treatment
- Therapeutic Foster Home
- Third Party Custody
- Own Home
- Other

(10) Hearing Locations♥

- Family Court
- Family Treatment Court
- Integrated Domestic Violence Court

(11) Hearing Outcome Categories♥

- Adjourned
- Permanency Plan Approved
- Permanency Plan Reviewed – Changed
- Permanency Plan Reviewed -- No Change
- Placement Reviewed -- Changed
- Placement Reviewed -- No Change
- Services Reviewed -- Changed
- Services Reviewed -- No Change
- Services Set
- Visitation Reviewed -- Changed
- Visitation Reviewed -- No Change
- Visitation Set
- Other

(12) Hearing Status Categories

- Continued - In Progress
- Continued - Without Hearing
- Held - Completed
- Other

(13) Hearing Type Categories

- Adjudication
- Adjudication & Disposition
- Adoption
- Disposition
- Permanency Planning
- Preliminary Protective

Termination of Parental Rights
Violation
Other

(14) Interested Person Roles

Doctor
Neighbor
School Counselor
Teacher
Therapist
Other

(15) Languages

English
French
Signing
Spanish
Other

(16) Notification Categories

Case Worker
Child's Attorney
County Attorney
Court
Father's Attorney
Foster Parents
GAL
Mother's Attorney
Other

(17) Permanent Plan Types

Adoption
Independent Living
Reunification/Reintegration
Other

(18) Petition Categories

Abuse/neglect
Adoption
Juvenile Delinquency
Family Offense
Termination of Parental Rights
Voluntary Placement
Other

(19) Placement Facility Categories

Detention Center
Emergency Shelter
Group Home
Guardianship
Hospital
Independent Living Program
Non Relative Adoption
Non Relative Foster Care
Relative Placement
Residential Treatment Facility
Therapeutic Foster Home
Third Party Custody
Own Home
Other

(20) Placement Reasons

Former Placement Requested
Move

Child Requested Move
Alleged Abuse or Neglect in
Former Placement
Case Closed
Child Placed With Sibling Group
Moved from Temporary Placement
Finished Program
Other

(21) Service Categories

Clothing
Counseling
Education
Medical
Psychological
Respite Care
Other

(22) Trainers

for each program to add as used

(23) Training Formats

Workshop
Video
Satellite
Independent Study
Other

(24) Training Topics

CASA Roles & Responsibility
Child abuse/neglect
Child protection/welfare agencies
Court process
Indian child welfare act
Cultural awareness
Mental illness
Alcohol/Substance abuse
Child abuse/neglect laws
Permanence
Domestic violence
Poverty
Psych. issues for children
Child development
Education issues for children
Communication skills
Information gathering
Court reports
Court observation
Volunteer survival skills
Advocacy Skills
(may be customized)

(25) Visitation Types

Supervised
Unsupervised
Other

(26) Volunteer Activities ♥

Reviewed Case Files
CASA supervisor contacted
Child visited out of court
Child's social/cultural/recreational
needs identified
Biological parents contacted
Visitation needs identified

Foster parents contacted
Foster parents' needs identified
Attended court
Attended FTC Team meeting
DSS contacted
Facilitated DSS staff transition
Facilitated communications
Foster care review/ permanency
planning meeting
Healthcare personnel contacted
Healthcare needs identified
Education personnel contacted
Educational needs identified
Developmental personnel
contacted
Developmental needs identified
Mental Health personnel contacted
Mental Health needs identified
Other Service Providers contacted
Identified services ordered/not yet
provided
Law Guardian contacted
Other relatives contacted
Incident of re-abuse/neglect
identified
Researched alternative placement
Wrote / Edited Court Reports
Other

(27) Volunteer Categories

Attorney
Staff
Volunteer
Board Member
Other

(28) Contact Type

Face-to-Face
E-mail
Phone
Written
Other

(29) Volunteer Court Activities ♥

Testified
Reported on Findings
Court Report Submitted
CASA Concern cited in new Order
Other

(30) Volunteer Referral Categories

Flyer
Friend
Internet
Local Newspaper
Local Radio
National Media
NCASA
Unknown
Volunteer Referral
Volunteer Match
Craig's List
Community Outreach
CASANYS

UCS
Other

(31) Volunteer Status Categories

In Training
Assigned to Case – Available
Not Assigned to Case – Available
Assigned to Case -- Not Available
On Leave
Other

(32) Discharge Reasons

Burnout/Stress
Case Satisfactorily Completed
Dismissed
Employment Situation
Family Needs
Frustration with System
Health Needs
Move from Area
Time Commitment

(33) Present at Hearing

Case Worker
Child's Attorney
Father's Attorney
Mother's Attorney

Staff
Staff Attorney
Volunteer
Other

(34) Ethnicity Categories

African American
Asian American
Caucasian
Latino / Hispanic
Native American
Bi Racial
Multi-Ethnic
Other

(35) Child Eligible Status

Blank Field: local customization

(36) Placement Facility Agencies

Blank Field: local customization

(37) Meeting Type

Admin Review
Consultation
IEP Meeting
Pre Trial

Review
Team Meeting
Other

(38) Meeting Status

Cancelled
Completed
Continued
Held
Rescheduled
Scheduled
Other

(39) Meeting Location

CASA Office
Courthouse
Home
DSS
Other

(40) Volunteer Education

College
GED
High School
Post-Graduate
Some College
Some High School
Other

Standardized Definitions and Terms

List of terms and related information can be found in alphabetical order.

1. Average number children assigned
2. Age
3. Board members serving
4. Child Counts
5. Disabilities for child
6. FTE
7. Friend of the Court
8. Other children served
9. Other volunteers
10. Out of court contacts
11. Permanency
12. Placement change
13. Status of case at program assignment
14. Total days assigned
15. Total days out of home
16. Volunteers active on cases
17. Volunteers completing training
18. Volunteers inactive
19. Volunteers total hours
20. Volunteers unassigned

1. **Average number children assigned:** The number of children assigned divided by the number of volunteers. Generally reported for a specified time period or point in time.

2. **Age:** Child Age is calculated as the number of days (converted to years) from the Date of Birth to the current date or the end date of a given report.

3. **Board members serving:** Board members are entered under the Volunteer section and the “Volunteer Type” is selected as “Board Member.” Those counted for NYS reports will include those who served at any time during the period.

4. **Child Counts:** COMET tracks data on the number of children assigned to the Program, and the number of children who have volunteers assigned to cases, as well as the time period between the date the case was assigned to the Program and the date of the first volunteer assignment (days on wait list) for any given time period entered in Report parameters. Note that these questions refer *only* to those children for whom a CASA has been appointed by the court in abuse, neglect or abandonment cases.

Number of Carry Over Children: This is the count of children whose date assigned to CASA program is prior to the Start date of the report and the date closed by the Program is null (blank) or after the End date of the report.

Number of New Cases: This is the count of children whose date assigned to the CASA program falls between the Start and End dates of the report period.

The number of days a child waits on a waiting list is made by subtracting the date assigned to the CASA program from the first date of the assignment of a volunteer to the child.

5. Disabilities for child: The categories are included in the Individuals with Disabilities Education Act (IDEA). IDEA allows for the term developmental delay to apply to children age 0 through 9 years who are experiencing one or more developmental delays. For children, ages 0 through 2, the term applies to diagnosed physical or mental conditions that may result in a delay. For children, ages 3 through 9, the term applies to children who require special education or related services. Disabilities should only be documented in COMET when diagnosed by a competent professional.

For more information on the definitions under each category visit the following webpage: <http://www.nichcy.org/pubs/genresc/gr3.htm#categories> at the National Dissemination Center for Children with Disabilities.

6. FTE: The number of full-time and part-time paid employees as full time is defined by *your program* defines as full time (*i.e., 35 hours, 37.5 hours or 40 hours per week*).

7. Friend of the Court: All programs in New York State follow the Friend of Court model.

8. Other Children served: counts the children in cases your program takes other than abuse and neglect cases. When entering the number of children served in these cases, *do not duplicate* the children already included in abuse and neglect cases. *This is a separate population.*

9. Other Volunteers: These are individuals in non-advocacy roles who provide support to CASA programs. To track these volunteers, create a new volunteer in COMET. When reports are created enter the number of non-case hours for each non-advocate volunteer or board member.

10. Out of Court Contacts: Contacts can be tracked under the Volunteer Activity Tab. The Activity Type is tracked in table (26) and the Contact type is tracked in table (28). The total number of hours and contacts can be entered in bulk.

11. Permanency: Permanency is achieved when a child lives in the intended permanent home that will provide family connections, a life-long commitment, continuity of care, a sense of belonging and a legal and social status. The legal parent is also the emotional parent as well as the parenting figure physically present in the child's life.

12. Placement change: When a child changes residence, even temporarily, the change should be recorded in COMET. Exceptions would include a planned respite weekend, or scheduled visitation.

13. Status of Case at Program Assignment: the point in the legal process at which the case was assigned to the CASA program. May be Adjudication; Adjudication and Disposition; Disposition and Permanency Planning; Foster Care Review; Termination of Parental Rights; Adoption; Preliminary Protective (in preventive services); or Other.

14. Total days assigned: Counts from the day a case was assigned to a volunteer to the day a case was closed for all cases during that reporting period.

15. Total days out of home: Calculates the difference between the date the child was removed from their home and the date the case closed OR the date of a placement when the child 'Returned home', in which case it takes that date.

16. Volunteers active on cases: The number of volunteers active during the time period, meaning that they served at least one child/at least one day. Do *not* include board members, office volunteers, or volunteers acting in a capacity other than advocacy for children unless they are currently also active as a CASA volunteer on a case.

17. Volunteers completing training: The number of volunteers who have completed training and who were sworn in during that quarter.

18. Volunteers inactive: The number of volunteers “on leave” during that entire quarter. Most programs require that volunteers complete additional training if they are on extended leave, or if they are not maintaining in-service hours. Note that a volunteer on leave for part of the quarter is defined as unassigned, if they are on leave for the entire quarter they are inactive.

19. Volunteers total hours: Volunteer time spent in advocacy role and calculated by the Volunteer Activity (detail *or* summary) report for the time period you enter. COMET does not automatically add in Training hours, however we do include them in the calculation of volunteer hours. Training time, including pre-service and in-service, is considered part of “volunteer hours.”

20. Volunteers unassigned: The number of volunteers who are sworn in prior (at any point prior to the end of the quarter) and not discharged before the end of the quarter who served no children in the course of the quarter. In other words, they were available to serve a child during that period, yet they were not assigned to a child at any time during that period. Note that a volunteer on leave for part of the quarter is counted as unassigned, but if they are on leave for the entire quarter they are inactive.

SAMPLE FORMS (see attached)

1. Case Information Form
2. Volunteer Activity Form
3. Court Hearing Information Form

Please note that COMET permits a very extensive case record, including narrative notes. Information on the following three forms is all the information that is necessary to track in COMET for reporting purposes. For instance, COMET may ask you to record a parent’s address and phone numbers; if you have them in your written case record, there is no need to enter them in COMET as they will not be part of any report that will be requested of you. However, parents’ demographics are necessary data that will be tracked and reported.

This in no way, however, restricts you from using COMET to any extent with which you are comfortable and find it useful.