

## Case Manager Reporting FAQ's

### **In-house/Independent:**

- **Will there be changes to the current invoice/reporting template?**
  - Yes, both the invoice and the in-house case manager report will be updated to standardize the data collected from both groups.
- **Will client time by activity be captured daily, weekly or monthly in the invoice?**
  - Activity time for direct services should be reported daily for each client. However, time can be consolidated by activity type for the day. For example, if you meet with a client in the morning for 30 minutes and then meet with them again in the afternoon for an hour, you could put one entry for Client Contract 1.5 hours for the day.
  - Activity time for administration, personal development, and non-case assigned direct services can be consolidated into one monthly total.
- **What time increments should I use to track my time?**
  - In accordance with Section 2.1 of [OPDC Billing and Invoice Submission Policy](#) time should be captured in 0.1 (6 minute) increments.
- **When is a case considered open and closed?**
  - A case is considered open when the case manager is brought on by the attorney. Circumstances that warrant case closure can be found in Exhibit B Section B.
- **Do I include the time I spend in transit and the time I'm waiting at court on my invoice/report? If so, what activity type would it fall under?**
  - Time in transit and mileage between home and office, home and a court, or the transport of a client should not be included in your invoice/report.
  - Time spent in court can be included in your invoice/report. If you do other work while waiting in court, you can only include time for one client/activity on your invoice/report. For example, if you reviewed discovery for client B while waiting in court for a hearing with client A, you could only bill for one of those at a time. In this

example, you would bill for the time you spend reviewing discovery for client B since that activity takes precedence over the time spent waiting in court. You would then bill for the remaining time you spent waiting in court under client A.

- **When is my invoice/report due?**
  - Per Section 9(h) of the contract, invoices/reports for the prior month are due on the first business day of the current month.

## **Independent:**

- **How do I submit a request for additional weight for a case that requires extraordinary work?**
  - OPDC is working on a Caseload Reporting Manual that will address how to request extraordinary work on a case. There will be additional communication on this in the future. In the interim, you can submit your extraordinary work request to Annie Borton at [Annie.Borton@opdc.state.or.us](mailto:Annie.Borton@opdc.state.or.us). Please include the client's name, case number, county, number of hours spent on the case and a short explanation of why the case is extraordinary in your email.
- **Do I have to submit a monthly caseload report in addition to my monthly invoice?**
  - No, you will only need to submit the invoice.
- **How will I bill for mileage?**
  - Mileage will be captured in the invoice and billed the same way it's always been.

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