

## Proposed Case Manager template changes/additions

5/8/2026

- **Independent Case Manager Template**
  - Column addition of Client First Name
  - Drop down for Hours in .1 increments
  - Renamed Attorney to Attorney OSB
    - Input bar# instead of attorney name
  - Renamed Brief description to Activity
    - Drop down with list of acceptable responses for each Hours category
  - Column addition of Open Date
  - Column addition of Close Date
  
- **In-House Case Manager Template**
  - One tab for information
    - Removal of County
    - Removal of Active Juvenile Case count
  - One tab for Case Data
    - Combined open case and activity report fields
    - Column addition of County
      - Drop down with county list
    - Column addition of Attorney OSB
      - Input bar#
    - Column addition of Case Type
      - Drop down with Case Types
    - Column addition of Hours Category
      - Drop down with Hours Categories