

COMPLIMENTARY PRINTABLE REFILLS

The journal may fill up. Your advocacy keeps moving forward.

LIFETIME COMPLIMENTARY PRINTABLE REFILLS

Your copy of The Practical CASA Journal includes access to printable refills for frequently used pages—so you can continue using the system through visits, hearings, follow-ups, and every advocacy moment in between.

SCAN TO ACCESS YOUR REFILLS



steadyheartstudio.com/refills

No account. No password. No purchase code.

A GENTLE CONFIDENTIALITY REMINDER

Before printing, storing, or disposing of refill pages, follow your local CASA/GAL program's confidentiality procedures. Never upload or enter confidential case information on the Steady Heart Studio website.

Thank you for showing up, listening carefully, and helping a child's voice be heard.

Your notes matter. Your follow-through matters. You matter.

STEADY HEART STUDIO

Stories for growing hearts. Systems for helping hands.

When one page fills up, another is waiting.





CASE AT A GLANCE



Key information, at a glance, so nothing important gets lost.

CASE IDENTIFIER: _____

DATE STARTED: _____

COURT / JUDGE: _____

CASE TYPE: _____

CASE OVERVIEW

A brief summary of the case as I understand it right now.

CURRENT STATUS

- ☐ Open
- ☐ In Progress
- ☐ Pre-Trial
- ☐ Post-Trial
- ☐ Other: _____

CURRENTLY IMPORTANT

Three things on my radar right now.

1. _____
2. _____
3. _____

The goal isn't to remember everything.
It's to know where to find it.





CASE TRACKER



A simple record of what changed, what matters, and what comes next.

UPCOMING COURT DATE

Date: _____

Time: _____

Location: _____

OTHER IMPORTANT DATE



Date: _____

Why it matters: _____

1

DATE: _____

☐ CLOSED



WHAT HAPPENED / CHANGED?

SOURCE / HOW I KNOW: _____

NEXT STEP / DUE: _____

2

DATE: _____

☐ CLOSED



WHAT HAPPENED / CHANGED?

SOURCE / HOW I KNOW: _____

NEXT STEP / DUE: _____

3

DATE: _____

☐ CLOSED



WHAT HAPPENED / CHANGED?

SOURCE / HOW I KNOW: _____

NEXT STEP / DUE: _____

4

DATE: _____

☐ CLOSED



WHAT HAPPENED / CHANGED?

SOURCE / HOW I KNOW: _____

NEXT STEP / DUE: _____



Small updates become the story of the case.
Write the movement down.





CASE TIMELINE

What important events and changes shaped this case over time?



Important events—not every event. Record the movement of the case.

WHAT BELONGS HERE?

Court decisions • Placement changes
Major service changes • School or health
developments • Family or case milestones

For tasks and deadlines, use Case Tracker
or Waiting & Follow-Up.

IF I DO NOT KNOW THE EXACT DATE

Mark it approximate.
Write what I remember.
Add where I can verify it.

♥ E = Exact
♥ A = Approximate
♥ V = Verified

DATE	IMPORTANT EVENT OR CHANGE	SOURCE / HOW I KNOW	WHAT CHANGED?
1. ☐ E ☐ A ☐ V			
2. ☐ E ☐ A ☐ V			
3. ☐ E ☐ A ☐ V			
4. ☐ E ☐ A ☐ V			
5. ☐ E ☐ A ☐ V			
6. ☐ E ☐ A ☐ V			
7. ☐ E ☐ A ☐ V			
8. ☐ E ☐ A ☐ V			

Detailed notes live on page: _____

Any action moved to:

☐ Case Tracker

☐ Waiting & Follow-Up

You don't have to hold the whole story in your head.



CASE TIMELINE—CONTINUED

What important events and changes shaped this case over time?

Keep the history clear. Keep the source attached.

DATE KEY: E = Exact A = Approximate V = Verified

Mark approximate dates clearly.
Add where the information came from.

MOVE TASKS AND DEADLINES TO:

☐ Case Tracker ☐ Waiting & Follow-Up

DATE	IMPORTANT EVENT OR CHANGE	SOURCE / HOW I KNOW	WHAT CHANGED?
9. ☐ E ☐ A ☐ V			
10. ☐ E ☐ A ☐ V			
11. ☐ E ☐ A ☐ V			
12. ☐ E ☐ A ☐ V			
13. ☐ E ☐ A ☐ V			
14. ☐ E ☐ A ☐ V			
15. ☐ E ☐ A ☐ V			
16. ☐ E ☐ A ☐ V			

Detailed notes live on page: _____

Any action moved to:

☐ Case Tracker ☐ Waiting & Follow-Up

☐ Important event—not every detail
☐ Source identified

☐ Approximate dates marked
☐ Verified dates updated when known

The timeline holds the history. The trackers carry the next steps.



PEOPLE IN THIS CASE



The right people. The right information. Easy to find.

CASE IDENTIFIER: _____

NAME	ROLE / RELATIONSHIP	CONTACT INFORMATION	LAST CONTACT DATE & HOW
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			

HAVE I INCLUDED THE KEY PEOPLE?

A quick check—not another list.

- | | |
|---|--|
| ☐ Child's attorney / Guardian ad Litem | ☐ School contact |
| ☐ Caseworker | ☐ Court staff / clerk |
| ☐ Parent / caregiver attorney | ☐ CASA supervisor / coordinator |
| ☐ Service provider / therapist | ☐ Other important person |

Use professional contact information only. Follow local confidentiality procedures.



WAITING ON & FOLLOW-UP

Keep the open loops visible until they are closed.

CASE IDENTIFIER: _____

1

WHO / AGENCY: _____

WHAT I NEED: _____

CONTACTED: _____ HOW: ☐ Email ☐ Phone ☐ Text ☐ In person ☐ Other

FOLLOW-UP BY: _____

STATUS: ☐ Waiting ☐ Received ☐ Closed another way

RESPONSE / NEXT STEP: _____

2

WHO / AGENCY: _____

WHAT I NEED: _____

CONTACTED: _____ HOW: ☐ Email ☐ Phone ☐ Text ☐ In person ☐ Other

FOLLOW-UP BY: _____

STATUS: ☐ Waiting ☐ Received ☐ Closed another way

RESPONSE / NEXT STEP: _____

3

WHO / AGENCY: _____

WHAT I NEED: _____

CONTACTED: _____ HOW: ☐ Email ☐ Phone ☐ Text ☐ In person ☐ Other

FOLLOW-UP BY: _____

STATUS: ☐ Waiting ☐ Received ☐ Closed another way

RESPONSE / NEXT STEP: _____

4

WHO / AGENCY: _____

WHAT I NEED: _____

CONTACTED: _____ HOW: ☐ Email ☐ Phone ☐ Text ☐ In person ☐ Other

FOLLOW-UP BY: _____

STATUS: ☐ Waiting ☐ Received ☐ Closed another way

RESPONSE / NEXT STEP: _____

BEFORE I CLOSE THE LOOP

- ☐ I recorded the response.
- ☐ I moved any action to the appropriate next-step page.
- ☐ I updated the Case Tracker if something changed.

A promise remembered. A question answered. A loop closed.

BEFORE I GO

A few minutes of clarity before a visit saves hours—and worry—later.

LAST TIME, I SAID I WOULD...



THINGS I NEED TO FOLLOW UP ON



PEOPLE I NEED TO SPEAK WITH



QUESTIONS I DON'T
WANT TO FORGET



THINGS I WANT TO OBSERVE—
NOT ASSUME



SOMETHING THE CHILD MENTIONED
LAST TIME THAT I WANT TO REMEMBER



PAPER-TOWEL PREVENTION CHECK



Anything else rattling around in my head
that needs to be written down before I leave?

Organized notes. **Clear follow-up.** More time for what matters.





THE VISIT

What did I personally observe and hear?

Record what happened—not what I think it meant.

VISIT DETAILS

DATE: _____

TIME: _____

LOCATION: _____

TYPE OF VISIT: ☐ Home ☐ School ☐ Office ☐ Virtual ☐ Community ☐ Other: _____

WHO WAS PRESENT: _____

WHAT I OBSERVED

Specific actions, words, interactions, and conditions I personally saw or heard.

☐ Child / Youth ☐ Caregiver interaction ☐ Home / Environment ☐ School ☐ Other

CHILD / YOUTH'S VOICE

Their words, wishes, concerns, questions, and what matters to them. Use quotation marks when exact.

STRENGTHS & POSITIVE MOMENTS

What was working, connecting, or going well?

CONCERNS OR CHANGES I NOTICED

What was different, unclear, or concerning?

Observed = what I saw or heard. Interpretation belongs in follow-up, not in the facts.



AFTER THE VISIT

What needs to happen because of this visit?

Capture it. Assign it. Date it. Close the loop.

CHILD / YOUTH ASKED ME TO...

A request, wish, or something they want remembered.

WHAT I SAID I WOULD DO

My commitments—only what I actually promised.

WHAT NEEDS TO BE VERIFIED

Information to confirm before I rely on it.

WHAT MY SUPERVISOR / TEAM NEEDS TO KNOW

Concerns, changes, questions, or time-sensitive information.

NEXT STEPS

Every action needs an owner and a date.

ACTION / NEXT STEP	WHO OWNS IT?	DUE BY	STATUS
			☐ Open ☐ Waiting ☐ Done
			☐ Open ☐ Waiting ☐ Done
			☐ Open ☐ Waiting ☐ Done
			☐ Open ☐ Waiting ☐ Done

CONTACT / FOLLOW-UP NEEDED

WHO / AGENCY: _____

WHAT I NEED: _____

FOLLOW UP BY: _____

☐ Add to Waiting On & Follow-Up

NEXT VISIT

DATE / TARGET: _____

BRING / ASK / CHECK: _____

☐ Add to Case Tracker

TIME-SENSITIVE?

Follow local program procedures. Contact my supervisor promptly for safety concerns or urgent changes.

☐ No ☐ Not sure ☐ Yes—contacted: _____ Date / Time: _____

If immediate safety may be at risk, follow emergency and mandatory-reporting procedures.

MOVE THIS FORWARD:

☐ Case Tracker ☐ Waiting On & Follow-Up ☐ Court Prep
☐ Next Visit ☐ Complete

A note becomes advocacy when it leads to action.



CASE CHECK-IN

Where does this case stand right now?

Pause. Look across the case. Notice what is moving—and what still needs attention.

CHECK-IN DETAILS

DATE: _____

THIS CHECK-IN IS:

☐ After several visits ☐ Before supervision ☐ Before a court report

☐ After a major change ☐ Other: _____

CASE PERIOD I AM REVIEWING:

TO _____

WHAT IS GOING WELL?

Strengths, progress, connection, stability, or positive movement.

WHAT HAS CHANGED?

New information, shifts, transitions, or developments.

CHILD / YOUTH'S CURRENT VOICE

What are they saying, asking for, worried about, or hoping for?

CURRENT CONCERNS OR UNMET NEEDS

Specific concerns, barriers, risks, or needs that remain.

WHAT IS STILL UNRESOLVED?

Open questions, repeated patterns, missing information, or loose ends.

WHAT MATTERS MOST RIGHT NOW?

If I focus on one advocacy priority, what should it be—and why?

WHAT STILL NEEDS TO BE VERIFIED?

SOURCE / WHO MAY KNOW:

PATTERNS I NOTICE ACROSS VISITS:

MOVE ACTIONS—DO NOT STORE THEM HERE

MOVED / UPDATED ON:

☐ Case Tracker ☐ Waiting On & Follow-Up ☐ Next Visit ☐ Court Report Notes

Step back far enough to see the case. Then bring the child back to the center.





PREPARE FOR SUPERVISION

What do I need help thinking through with my supervisor?

Bring the facts. Name what is unclear. Leave with a shared next step.

SUPERVISION DETAILS

DATE: _____ TIME: _____

SUPERVISOR / COORDINATOR: _____

☐ Scheduled ☐ Phone ☐ Virtual ☐ In person ☐ Unplanned

TOPICS ON MY MIND

☐ Child / Youth's Voice ☐ Court / Report
☐ Safety or Well-Being ☐ Role or Boundaries
☐ Family / Caregiver ☐ Confidentiality
☐ Services / Education ☐ Other: _____

QUESTIONS OR SITUATIONS I NEED GUIDANCE ON

1

QUESTION / SITUATION: _____

WHAT I KNOW—FACTS & SOURCE: _____

WHAT IS UNCLEAR / WHAT DECISION IS NEEDED: _____

2

QUESTION / SITUATION: _____

WHAT I KNOW—FACTS & SOURCE: _____

WHAT IS UNCLEAR / WHAT DECISION IS NEEDED: _____

3

QUESTION / SITUATION: _____

WHAT I KNOW—FACTS & SOURCE: _____

TIME-SENSITIVE OR SAFETY CONCERN?

☐ No ☐ Not sure ☐ Yes

I will follow local program procedures and contact my supervisor promptly rather than waiting for the next routine meeting.

DATE / TIME CONTACTED: _____

GUIDANCE / DECISIONS FROM MY SUPERVISOR

What did we clarify, decide, or agree should happen?

SHARED NEXT STEPS

ACTION / NEXT STEP	WHO OWNS IT?	DUE BY	STATUS

FOLLOW-UP WITH MY SUPERVISOR BY: _____ ☐ Guidance documented ☐ Actions moved ☐ Notes updated

Good supervision strengthens good advocacy. I do not have to figure everything out alone.

COURT DATES & REPORT DEADLINES

When must each court task be completed?

Start with the hearing. Work backward. Confirm every date.

HEARINGS AT A GLANCE

HEARING DATE	HEARING TYPE	MY DRAFT DUE	FINAL REPORT DUE	STATUS
				☐ Planned ☐ Submitted ☐ Confirmed
				☐ Planned ☐ Submitted ☐ Confirmed
				☐ Planned ☐ Submitted ☐ Confirmed
				☐ Planned ☐ Submitted ☐ Confirmed
				☐ Planned ☐ Submitted ☐ Confirmed
				☐ Planned ☐ Submitted ☐ Confirmed

MY LOCAL REPORT RULE

My draft is due to my program / supervisor: _____ ☐ business ☐ calendar days before the hearing.

The final approved report is due: _____ ☐ business ☐ calendar days before the hearing.

Who submits or files the final report? _____

Where / how is it submitted? _____

Deadlines and submission responsibilities vary. Confirm these instructions with my supervisor.

FOR THE NEXT HEARING—WORK BACKWARD

HEARING DATE: _____ TIME: _____ TYPE: _____

TASK	DATE	DONE
Begin gathering updates		☐
Information / records needed by		☐
First draft completed		☐
Draft sent to supervisor / program		☐
Feedback expected		☐
Revisions completed		☐
Final approved report due		☐
Submission confirmed		☐

SUBMISSION CONFIRMATION

DATE / TIME: _____

METHOD: _____

CONFIRMED BY: _____

IF A DEADLINE MAY BE MISSED

Contact my supervisor immediately.
Do not assume a late report will be accepted.

WHO I CONTACTED: _____

DATE / TIME: _____

BEFORE I MARK IT COMPLETE: ☐ Current local template ☐ Supervisor reviewed it ☐ Revisions complete ☐ Submission confirmed

BUILD THE COURT REPORT

What belongs in this report?

Gather the strongest information. Name the source. Keep the child at the center.

REPORT DETAILS

HEARING DATE: _____ REPORTING PERIOD: _____ TO _____
LOCAL TEMPLATE / VERSION: _____

THE THREE THINGS THE COURT NEEDS TO UNDERSTAND

If the court remembers only three things, what must they be?

1. _____
2. _____
3. _____

CHILD / YOUTH'S VOICE & WISHES

What have they said, asked for, worried about, or hoped for?

IMPORTANT CHANGES

What is new, different, improved, or unresolved?

STRENGTHS & PROGRESS

Specific movement, connection, stability, or effort.

CONCERNS & UNMET NEEDS

Specific conditions, patterns, barriers, or risks.

KEY INFORMATION & SOURCE

Every important statement should show where it came from.

O = Observed C = Child / Youth P = Person Reported R = Record

KEY FACT / UPDATE	SOURCE TYPE	WHO / DOCUMENT	DATE

RECOMMENDATIONS TO CONSIDER

What action am I asking the court to consider—and what facts support it?

- 1

RECOMMENDATION: _____
SUPPORTING FACTS / SOURCES: _____
CHILD / YOUTH'S VIEW: _____
- 2

RECOMMENDATION: _____
SUPPORTING FACTS / SOURCES: _____
CHILD / YOUTH'S VIEW: _____

BEFORE I DRAFT

- ☐ Information is current ☐ Sources and dates are identified ☐ Child's voice is included
☐ Recommendations are supported ☐ Unverified information is marked ☐ Current local template

STILL NEED TO VERIFY / GATHER: _____

PREPARE FOR THE HEARING

What does the court need me to be ready to explain?

Know what changed. Know the source. Know what I do—and do not—know.

HEARING DETAILS

DATE: _____ TIME: _____ TYPE: _____
☐ In person ☐ Virtual JUDGE: _____
LOCATION / LINK: _____ ARRIVE / LOG IN BY: _____

WHAT HAS CHANGED SINCE THE REPORT WAS SUBMITTED?

New information, events, concerns, progress, or changes the court may need.

☐ My supervisor has been updated DATE / TIME: _____

CHILD / YOUTH'S CURRENT VOICE

What do they want the court to know now?
Have their wishes changed?

QUESTIONS I STILL NEED ANSWERED

What remains unclear before the hearing?

I AM READY TO EXPLAIN...

☐ MY FIRSTHAND OBSERVATIONS

What I personally saw or heard—and when.

☐ REPORTED INFORMATION

Who shared it, their role, and the date.

☐ MY RECOMMENDATIONS

The facts supporting what I am asking the court to consider.

☐ WHAT I DO NOT KNOW

What is unverified, outside my knowledge, or still pending.

QUESTIONS I MAY BE ASKED

Q: _____
Q: _____
Q: _____

QUESTIONS I NEED TO ASK

Q: _____
Q: _____
Q: _____

BEFORE COURT

☐ Confirmed date, time, location, or virtual link
☐ Reviewed the final submitted report
☐ Confirmed with my supervisor what to bring

☐ Can identify the source of important information
☐ Know the child / youth's current wishes
☐ Follow local confidentiality procedures

WHEN I ANSWER

Pause. Listen to the whole question. Answer only what was asked. Identify the source. If I do not know, say so—do not guess.

COURT OUTCOME

What did the court decide today?

Capture it while it is fresh. Confirm it before I rely on it.

HEARING DETAILS

DATE: _____ TIME: _____ HEARING TYPE: _____
JUDGE: _____ ☐ In person ☐ Virtual WHO ATTENDED / APPEARED: _____

PLAIN-LANGUAGE SUMMARY

What happened, in words I will understand later.

ORDERS / DECISIONS I HEARD

ORDER / DECISION	WHO OR WHAT IT AFFECTS	EFFECTIVE / DUE DATE	CONFIRMED
			☐
			☐
			☐
			☐

WHAT CHANGES NOW FOR THE CHILD / YOUTH?

What is different because of today?

CHILD / YOUTH'S VOICE OR PARTICIPATION

What was shared, heard, or considered?

WHAT WAS DIFFERENT FROM THE REPORT—or WHAT I EXPECTED?

☐ I notified my supervisor

DATE / TIME: _____

NEXT HEARING

DATE: _____ TIME: _____ TYPE / PURPOSE: _____
LOCATION / LINK: _____ ☐ Added to Court Dates & Report Deadlines

CONFIRM THE OUTCOME

These immediate notes are not the official written order. Review them with my supervisor and the written order.

☐ Reviewed with supervisor ☐ Written order received / available ☐ Orders and dates confirmed

CONFIRMED BY: _____ DATE: _____

COURT FOLLOW-THROUGH

What must happen next?

Confirm the outcome. Assign the work. Track it until the loop is closed.

START WITH CONFIRMED INFORMATION

HEARING DATE: _____

WRITTEN ORDER DATE: _____

☐ Reviewed with supervisor ☐ Written order received / available ☐ Orders and dates confirmed

If anything is unclear, ask my supervisor before acting or communicating it as final.

ORDERS & NEXT ACTIONS

ORDER / NEXT ACTION	WHO OWNS IT?	DUE BY	HOW WILL I CONFIRM?	STATUS

Status: ☐ Not started ☐ In progress ☐ Waiting ☐ Done / confirmed

COMMUNICATION PLAN

WHAT NEEDS TO BE SHARED	WHO NEEDS TO KNOW	WHO WILL COMMUNICATE?	BY WHEN	CONFIRMED

IMMEDIATE NEXT STEPS

- ☐ _____
- ☐ _____
- ☐ _____

WAITING / NEEDS VERIFICATION

ITEM	WAITING ON	FOLLOW UP BY

WHAT NEEDS TO MOVE INTO THE JOURNAL?

☐ Court Dates & Report Deadlines

☐ Case Tracker

☐ Waiting & Follow-Up

☐ Next Visit

☐ Court Report Notes

☐ Supervisor / Team Follow-Up

MOVED / UPDATED ON: _____

CHECK BACK

DATE I WILL REVIEW THIS PAGE: _____

☐ Open actions reviewed ☐ Waiting followed up ☐ Completed work confirmed

☐ Changes shared with my supervisor



CLOSING THE CASE JOURNAL

What must be completed before I close this journal?

Confirm the ending. Transfer what remains. Protect the record.

CLOSURE DETAILS

DATE MY ASSIGNMENT ENDED: _____

CONFIRMED WITH SUPERVISOR / PROGRAM ON: _____

Follow my local program's language and closure procedures.

REASON / STATUS:

- ☐ Court closed the case
☐ Permanency achieved
☐ Case transferred / reassigned
☐ Assignment ended ☐ Other: _____

CONFIRMED OUTCOME

Summarize how this assignment ended. Verify details with my supervisor and available records.

OUTSTANDING ITEMS TRANSFERRED

Nothing open should disappear when my assignment ends.

OPEN ITEM / COMMITMENT	TRANSFERRED TO	DATE	CONFIRMED
			☐
			☐
			☐

FINAL DOCUMENTATION

- ☐ Final contact / activity log completed
☐ Required report or summary submitted
☐ Time or mileage records completed
☐ Case Tracker updated
☐ Waiting items transferred
☐ Court and visit records current
☐ Remaining questions reviewed with supervisor

RECORDS & CONFIDENTIALITY

- ☐ Journal handled as my program directs
☐ Physical notes returned, archived, or destroyed as directed
☐ Electronic notes, files, photos, or downloads handled as directed
☐ No identifying case information retained outside approved systems
☐ Return location / person confirmed

DATE COMPLETED: _____

RELATIONSHIP & COMMUNICATION CLOSURE

- ☐ Confirmed who is responsible for communicating the ending
☐ Addressed or transferred promises I made
☐ Followed program guidance for goodbye, final contact, gifts, and future communication
☐ Child / youth's questions or wishes were shared with my supervisor

FINAL CLOSURE CHECK

- ☐ Reviewed with supervisor / coordinator
☐ No unassigned actions remain
☐ Record handling is confirmed

REVIEWED WITH: _____

DATE: _____

Closing carefully is part of advocating well.



WHAT I CARRY FORWARD

What do I want to carry forward from this case?

Honor what mattered. Learn from the work. Set down what is no longer mine to hold.



STRENGTHS I WITNESSED

Qualities, growth, courage, or connection I want to remember—without identifying details.

WHAT THIS CASE TAUGHT ME ABOUT ADVOCACY

A lesson, skill, or perspective I want to bring with me.

A MOMENT THAT MATTERED

A moment of progress, trust, courage, or hope I want to remember.

WHAT I WANT TO BRING INTO MY NEXT CASE

WHAT I AM READY TO SET DOWN

SUPPORT I MAY STILL NEED

A question, feeling, or experience I want to discuss with my supervisor or support system.

☐ Debrief with supervisor

☐ Ask for guidance

☐ Take time before my next case

☐ Other:

MY CLOSING THOUGHT

One sentence I want to leave with this journal.

I can honor the work without carrying every part of it forever.