



Advocate Quick Optima Instructions

1. **LOGIN:** To get to the Optima login page, go to our website (dupagecasa.org). Click on Volunteers Resources at the top of the home page. On the right side of the page in the blue box, click on “Advocate Login to Optima”. This will bring you to the Optima login page.
2. **USER NAME AND PASSWORD:** Use the User Name and password given to you by your Supervisor.
3. When you get to the first screen you will find an orange box labeled Volunteer Dashboard. Below that are two boxes – Address Book and Personal Information. You can update your personal information whenever that changes – address / email / phone. You still need to contact your supervisor with these changes.
4. Below these two boxes is a list across the screen. The sections include To-Do-List, Cases, Training Logs, Non-Case and Calendar.
5. **YOUR CASE:** When you click on “cases”, the case(s) to which you are assigned will be shown. Click on the case number to see all the information regarding that case. When you scroll down to the bottom of that page, there is another list across the page directly below the family members section. These include: contact logs, to do, associated parties, wellbeing, documents, petitions and allegations, hearings, placement history and case closing history.
6. **FOSTER PARENT INFORMATION:** Do this **BEFORE** you make a contact log entry. To add foster parent, go to the bottom of the case information sheet and click on “Associated Party”. Click “Add” and you will see a screen with 3 choices – attorney, caseworker or interested party. Select interested party. Below that is will a drop down list – click on that. If the name is not on that list, then click the blue button marker “New”. This will bring you to a screen that has “Association” and your choices are again attorney, caseworker or Interested Party. Select “interested party”. Select they type from the drop down list (relative foster parent, therapist, etc.) Fill in the information. Click the Green Create button. This will bring you back to the Interested Party sheet. Click the select button and the name you just entered will be in the drop down list. Highlight that name and click the green “Save” button. This will then bring you back to a screen where you will need to choose if this person is attached to a child or parent. Complete that part of the sheet and click save. This person will now appear in the box on the right side of the contact log sheet.
7. **NEW CASEWORKER:** Do this **BEFORE** you make a contact log entry. To add or change a caseworker, you will do the same procedure as in #10, except you will click on “caseworker” rather than “interested party”.

8. **RECORD YOUR ACTIVITY:** You will record your activity on your case in the Contact Logs. Click on “add” and fill in the form. Be sure to enter hours and miles. Check the box by the name of the person contacted (in the box on the top right of the page) or add the information of “others contacted” below that box. There is a place on that page for notes. Click the green button marked “create” and it will be recorded. Your supervisor will be notified that you have made an entry and will either approve or deny it. The reason it would be denied is usually because there is some missing information.
9. **DOCUMENTS:** This is where you can find the agency reports, notices of ACRs and court orders. If there is a document there, click on the Magnifying glass on the far right to see the document.
10. **NEXT COURT DATE:** Click on Hearings and you will see when the next hearing is scheduled and when your report is needed.
11. **NON CASE:** When you do an activity for CASA that is not directly related to your case, and is not a training log entry, you can record that in the Non Case section (see #4).