Optima Instructions for Advocates

Welcome to Optima. These instructions are for CASA Advocates and are meant to briefly describe the parts of Optima and how to use them to record and retrieve information. For any questions not answered in this document, please contact your Advocate Supervisor.

VOLUNTEER DASHBOARD

Address Book: You can add case contacts here, but your supervisor will not be able to access this address book – only you can see it. A better practice is to keep all the case contact information in appropriate tabs for family members, associated parties, or children in case. More on keeping your contacts below.

Personal Info: The info you gave in your application will be entered here. If you need to edit the information, you can click the edit button and make changes. Be sure to click save once you have entered the changes.

Cases: This is a listing of all the cases you are assigned. To enter the case, click on the case number. You can also enter the case by clicking on the magnifying glass on the right side under "Action." To go straight to a new contact log for your case, click on the paper & pencil button. More details about contact logs below.

To-Do List: This is currently not used. It is a place where "tasks" could be assigned to you.

Training Logs: This is where you record your CEC's, input the time allotted for the CEC, your mileage and expenses. If you have significant travel time (like the CEC was in Chicago or Peoria or other place) add that travel time in the Non-case time. See below for more on Non-case entries.

> Add: Click the add button to put in the details of your activity. Be sure to write a short synopsis of the activity in the notes section. Then click create. Once you click create your activity will show up in your supervisor's dashboard so they can review and approve the activity. Once it is approved, it will show as "approved."

Non-Case: This is where you record your volunteer hours for non-case activity like, volunteering at BrewFest or the golf outing. If you incur travel time for CEC's you should also enter that time here.

> **Add:** Click the add button to put in the details of your activity. If adding travel, be sure to write where you traveled to and from and for what purpose in the notes section. Then click create. Once you click create it will show up in your supervisor's dashboard so they can review and approve the activity. Once it is approved, it will show as "approved."

Calendar: This tab will show you the next hearing in your case. This feature is not used or checked by supervisors.

New Docs: This tab will display documents that have recently been added to your case. The documents will be listed here for approximately 2 weeks. They will remain in your "Documents" tab in your case indefinitely (see below).

CASE DETAILS: From the Volunteer Dashboard, click on the case number to view the case details.

Case Information: Information entered by the supervisor when the case opens. Advocates cannot edit this info.

Case Assignments: List of CASA Advocates and Supervisors assigned to the case with contact information. Only CASA staff and assigned advocates can see case information. If for some reason one person leaves the case, they will be "released" in Optima and will no longer have access to the case.

Children in Case: Names of the children in the case. Click on the magnifying glass to see the Child Details, including date of birth, address and more. If something here is incorrect, please tell your supervisor who can make the corrections.

Languages: English is checked by default. If your child does not speak English as a first language, press Add and select the child's language.

Disabilities: Please add any disabilities your child has. If the disability is not there, please tell your supervisor who can add it to the dropdown list.

Schools: Please enter whether your child has an IEP and the renewal date (if you know it). Please put in the school(s) your child(ren) attend(s) and fill in any additional information you have. If the school is not listed, tell your supervisor and they can add it.

Eligibility: We do not use this tab.

Placements: A listing of the placements in the case. This list populates based on what you input into the system. More on this below.

Hearings: This tab may have no information for your case. Only supervisors can input information here.

Closing Information: This is used only when the case closes and only supervisors can input this tab.

Current Placements: A list of the current placements. The information in here is based on the information you input.

Add: This is where you input updates on new placements. Select the child or children, then select who the child is placed with. If you cannot find the facility where your child is placed on the list, you can contact your supervisor who can add it. (If you cannot find family members or interested parties, you can fix that in either the Family Member Tab, or the Associated Parties Tab, instructions below.) In the Placement Details section, input the from and to dates, whether they are placed with siblings, and type of placement,

the reason for the placement and any notes. Be sure to click create to save your work. It is your responsibility to keep this up to date.

Family Members: This list should include the parents, grandparents, siblings and any other family members who are known.

> **Add:** You can add family members here. Fill in as much information as you have. Be sure to select their relationship to the child and, if not already there, add the children in the relationships tab. For family members, fill in the language (if not English), disabilities, concerns & employment information if you have it.

Contact Logs: This is where you keep notes on your case. All contacts with CW, NPs, children, supervisor should be entered here. Your contact log will show as "pending" until your supervisor has read and approved it. While a note is pending, you can still edit it by clicking on the pencil & paper icon. Click on the magnifying glasses to view individual notes.

> **Add:** Click Add to enter a contact log. Fill in all the boxes and provide some detail in the notes section. When adding your time, add it in increments of a quarter of an hour (ex., .25, .5, .75, 1, 1.25 etc.). Your supervisor only knows what you tell them, so provide detailed notes in your contact logs. Be sure to check the boxes on the right for the people you had contact with. If they are not listed, you can add their name in the boxes below. If they are a recurring person in the case, you can add them in the Associated Party or Family Member sections, or contact your supervisor to have them added to the case.

> **View Notes:** Click this to see all the notes together. To print out all your notes, copy and paste all the notes to a word processing document.

> **Search:** You can search by date, subject (of contact log), activity type, party, or volunteer. You can only search for parties if they appear in the check boxes and you check them off when entering the log.

Associated Parties: A listing of all the people (not the parents, other family members or children) involved in the case. This can include attorneys, CWs, therapists, teachers and others. If a person is released, they are no longer part of the case. It is your responsibility to keep this part up to date.

> Add: First select the type of party: Attorney, CW or Interested Party (foster parents, therapist and others). Once you have selected the type of party, choose a name from the drop down list. If the name you are looking for is not there, you can add it by clicking "new" and filling in all the information you have. Once a party is added they cannot be deleted, so make sure they are not on the list before adding a new party. Once you add the party to the list, then add them to the case. Be sure to select the child or family member they are associated with. If you make mistakes, let your supervisor know.

Wellbeing: We do not use this tab.

Documents: This is where all the documents in the case are kept, including Orders, Service Plans and CASA Reports. You can view all the documents uploaded in your case under this documents tab.

> **Add:** You should not be adding documents to the case. Do not upload your CASA report to the case. CASA reports should be emailed only to your supervisor. Once the CASA reports are finalized, they are scanned and added to Optima by the office.

Petitions and Allegations: This part is completed by the supervisor when the case is opened. If you click on the magnifying glass, you get few details. To read a petition, look for it in the Documents tab.

Hearings: This is filled in by your supervisor and contains the court hearings, ACRs and CASA Report due dates. Clicking on the magnifying glass will allow you to see the notes your supervisor input regarding this date.

Placement History: A listing of the places the child has lived while the case has been open. This list only reflects what you have entered in the "Current Placement" tab above.