Optima Cheat Sheet for CASA Volunteers

The case information database for CASA of San Luis Obispo County is called Optima. It is accessible 24/7 on the web at **https://ca-slocasa.evintosolutions.com/.** We encourage you to bookmark the Optima login page link for easy access. DO NOT Google "optima" and try to access it that way - you will not end up on our specific version of Optima and you won't be able to log in. We also have a page on our website at **https://slocasa.org/optima/** with a direct link and other resources about Optima.

There are separate desktop and smartphone versions of Optima. We strongly encourage volunteers to use the desktop version of the Optima database whenever possible. The mobile version, called Optima Go, has limited functionality, but can be a good resource for quick reference when you are not in front of a computer or tablet.

If you misplace your username, please contact your supervisor for assistance. If you forget your password, there is a password recovery option on the Optima login page. The advocate supervisors do not have access to volunteer passwords.

Section 1: Volunteer Dashboard Overview

- **Address Book** - Optima is used by CASA programs in dozens of states. There are some features that we don't use or aren't relevant to the SLO program. This is one of them. You're welcome to add info here if you'd like, but it's not required or recommended.
- **Personal Info** - This section shows information about you that you can change or update. Click the green Add or Edit buttons to make changes and be sure to save when you're finished.
- **Cases** - This is a key section of Optima and where you will spend most of your time, adding contact logs, accessing files, and otherwise keeping your case up to date.
- **To-Do List** - This is another tab our program does not use so you can ignore it.
- Training Logs - This will be one of the areas you use the most in Optima. Add in-service trainings and continuing education activities here.
- **Non-Case** - On this tab you can add any time you spend volunteering for CASA outside of your case (for instance if you help at an event) or other volunteer work you do.
- **Calendar** - This tab will show a calendar listing upcoming hearings and approximate due dates for court reports. It can be helpful but you probably won't need to use it very often.
- **New Docs** - This is a shortcut to see any documents that have been added to your case in the past 2 weeks. Your supervisor may point you here after they've uploaded a new document.
- **Help** - In spite of the name, this area is not really helpful. System updates and password requirements are stored here. If you really need help when working within the system, please contact your supervisor for assistance.

Section 2: Contact Logs

A contact log is your way to catalog visits with your assigned child, notes you take after talking with social workers, teachers and others related to the case, and other hours you spend driving, writing court reports or other related activities.

To add a contact log

1. On the Case Details screen, scroll to the bottom. The “Contact logs” tab should be highlighted in blue by default. Click the green “Add” button below the tab.
2. On the left side of the Add Contact Log screen, complete the following fields:
    - Activity Date
    - Activity Type - Select from the starred dropdown menu items
    - Subject - Add a relevant description/summary of the log if you’d like
    - Contact Type
    - Hours - Enter time as hours, not minutes, and round to the nearest 15 minutes. For instance, for an activity that took 90 minutes you would enter 1.5 in this field.
    - Mileage - If you drove as part of this contact, add the mileage here
    - Expenses - We do not use this field so you can leave it at $0.00
    - Notes - Type in your notes here
3. On the right side of the Add Contact Log screen, select at least one party the contact log pertains to. Typically, your contact logs will pertain to the child(ren) you are assigned, but you can and should select other parties as well if they are relevant to the contact you are entering. If you do not see a party available in the checkbox area, enter them in the “Others Contacted” fields below. If you think you will be referencing a party often, we’ll be showing you in a bit how you can add them as an “Associated Party.”
4. Scroll to the bottom of the screen and click the green “Create” button to save your entered information. Your contact log will have saved correctly if you are returned to the main Case Details page and you see it listed as “Pending” under Contact Logs.

Pro tip: From your dashboard, you can go right to a new contact log by clicking the pen and paper icon on the right side of your case overview.

Section 3: Training Logs

This is where you will enter time you spend at scheduled in-service trainings along with other continuing education you do such as reading the Voice each month or watching a movie.

To add continuing education/training hours

1. From the Dashboard screen, find and click on the “Training Logs” tab.
2. From the “Training Logs” tab, click the green “Add” button.

3. On the “In-Service Training” screen, enter information in the following fields:
    a. Schedule Date: Choose the date of an in-service training or the date you completed any other continuing education item.
    b. Complete Date: Choose the same date as above.
    c. Training Topic: Choose the name of the training/continuing education completed from the dropdown menu. If you do not see a relevant entry in the menu, select “Other” and be sure to describe the educational activity in the Notes field.
    d. Training Format: Select “In-Service” for any scheduled training events you attended either in person or online. Select “Continuing Education” for any other educational activities. You should not need to select “Other”.
    e. Trainer: If an in-service training was hosted by a particular person, select them here. If not, this field can be left empty.
    f. Hours: Enter the number of hours spent on the training/continuing education. Enter time as hours, not minutes, and round to the nearest 15 minutes. For instance, for an activity that took 90 minutes you would enter 1.5 in this field.
    g. Mileage: Do not enter anything in this field. If you have mileage to add, log it under your case.
    h. Notes: Enter any clarifying details about the training/continuing education you completed. For instance, if you read a book, list the book title and author here.
4. Click the green “Create” button at the bottom of the screen to save your entry. Your training log will have saved correctly if you are returned to the main Dashboard page and your training log shows as Pending there.

Section 4: Other Case Updates

This section outlines other things you can do from the Case Details page.

A. View a child’s info

1. On the “Case Details” screen, scroll down to the Children in Case section.
2. For more details about the child, click on the magnifying glass icon on the far right in the “Action” column.
3. At the top of the Child Details page, you can view this information but you can’t edit it. If you believe any important info is missing or incorrect, contact your supervisor.
4. There are also some tabs at the bottom of the Child Details page which you can edit. The main one of interest is “Schools.” This is a nice place for tracking IEP dates and school/grade if you are interested in doing so.

B. View or change a child’s placement

1. On the “Case Details” screen, scroll about halfway down to the Current Placements section.
2. For more details about that placement, click on the magnifying glass icon on the far right in the “Action” column.

3. To add a new placement, click on the green Add button and:
    a. If the child is placed in a county or FCNI foster home, check the Placement Facility table, select the correct entry and add the placement start date;
    b. If the child is placed with a family member, and the Family Member is already listed in the drop-down menu, select the correct entry and and then add them as the placement;
    c. If the foster home or family member is not listed in the Placement Facility or Family Member tables, or you want to leave this activity for Program Staff, just let your supervisor know.

C. View or change family member info

1. On the “Case Details” screen, scroll about halfway down to the Family Members section.
2. For more details about each family member, click on the magnifying glass icon on the far right in the “Action” column.
3. You can edit the information for a family member if for instance you find out they have moved. But generally, this information will be maintained by your supervisor.

D. Find someone’s contact info

1. On the “Case Details” screen, scroll to the bottom. Find and click on the “Associated Parties” tab.
2. Use the table listing Name, Association, etc. to locate the person. By default, the table is organized alphabetically by last name. Contact info for the person is displayed in the second column from the right.
3. If you want more details, you can click on the magnifying glass icon on the far right in the “Action” column. This can be helpful if you need to identify which family member an attorney represents, or if you need a person’s mailing address.

E. Add an Associated Party

1. On the “Case Details” screen, scroll to the bottom. Find and click on the “Associated Parties” tab.
2. Click the green Add button. Note: please do not add Attorneys or Caseworkers...the drop-down menus should contain all of the entries you will need. If not, contact your supervisor.
3. If you want to add another Interested Party, for instance a foster parent or service provider, and you see the person already in the dropdown menu, select them and then click the green Save button.
4. If you do not see the person in the dropdown menu, click the blue New button. This will take you to a new screen to enter the party’s information. Fill out as much as you know and then click the green Create button. You will then be returned to the screen where you can select this party from the dropdown menu and Save them.

F. View a case document

1. On the “Case Details” screen, scroll to the bottom. Find and click on the “Documents” tab.
2. Use the table listing File Name, Document Date, etc. to locate the document you want. The table is sortable by column and can be filtered using the “Filter by” section above the table. Documents associated with an upcoming hearing will have been uploaded by your supervisor with the hearing date vs. the date received.
3. When you’ve found the document you want, click the magnifying glass icon on the far right in the “Action” column. This will trigger a popup window where you can choose how to view or save the file.

G. Upload a case document

1. Save your document with the following naming structure: Child/Children First Initial-Last Name-Name of Document-Date Entered.
2. On the Case Details screen, scroll to the bottom. Find and click on the “Documents” tab. Click the green “Add” button below the tab.
3. From the “Add” screen, click the “Browse” button to select the document from your device. A popup window will appear for you to select the file.
4. Once you have selected the file, use the dropdown menu to select the Document Type. If the document doesn’t fit with any of the Document Type choices, select “Other.”
5. Once you have selected a document type, use the field below to enter a Document Date. This date should be the date listed on the document or if no date is listed, today’s date.
6. Click the green “Save” button to finish uploading the document. Your document will have uploaded correctly if you are returned to the main Case Details page. Your document details will be shown in the list of documents within the Documents tab.

H. See upcoming hearing dates

1. On the “Case Details” screen, scroll to the bottom. Find and click on the “Hearings” tab.
2. Use the table listing Date, Time, etc to locate the hearing you are interested in. For more details about that hearing, click on the magnifying glass icon on the far right in the “Action” column.
3. Upcoming hearings will also be displayed on the Calendar tab of the Volunteer’s Dashboard.

I. Areas to ignore on the Case Details screen

- To Do tab
- Services tab

Section 5: Mobile Interface

Please note that the mobile/smartphone version of the Optima site has intentionally limited functionality. It can be used for quick reference on your case but in general, we encourage you to use the system on a desktop or tablet device.

Note that when you log in on a mobile device or smartphone, you will be taken to a home screen with a prominent calendar shown. CASA of San Luis Obispo County does not utilize this calendar/events feature and it can be ignored. The main functionality within the mobile interface is the “My Cases” area.

A. Add a contact log

1. From the “Home” screen, click on the “My Cases” button in the middle of the bottom of the page.
2. From the “My Cases” screen, click on your case.
3. This will open the “Go” screen. From this screen, click on “+ Contact Log”.
4. On the “Add Contact Log” screen, enter information at least in all the required fields, marked with a red asterisk. You can also enter mileage or notes if appropriate. When finished, scroll down to select at least one party the contact log pertains to.
5. When you have finished entering information for the contact log, click the word “Save” in the upper right of the screen. Or, if you do not want to create the contact log, click the word “Cancel” in the upper left of the screen.

B. View a case document

1. From the “Home” screen, click on the “My Cases” button in the middle of the bottom of the page.
2. From the “My Cases” screen, click on your case.
3. This will open the “Go” screen. From this screen, click on “View” under Documents.
4. On the “View Documents” screen, documents uploaded to the case will be displayed in chronological order from newest to oldest. Click “View” next to the document you want to view. The document should automatically download to your device and open.
5. To return to Optima, exit out of the document viewer.

C. See upcoming hearing dates

1. From the “Home” screen, click on the “My Cases” button in the middle of the bottom of the page.
2. From the “My Cases” screen, click on your case.
3. This will open the “Go” screen. From this screen, click on “View” under Hearings.
4. On the “Select Hearing” screen, hearings will be displayed in chronological order from newest to oldest. If needed, click “View” on the right side of the screen for additional hearing details.

D. Find someone’s contact info

1. From the “Home” screen, click on the “My Cases” button in the middle of the bottom of the page.
2. From the “My Cases” screen, click on your case.
3. This will open the “Go” screen. From this screen, click on “View” under Associated Parties.
4. From the “Select Associated Party” screen, scroll to locate the person. Phone and email address are provided right on this screen, but for additional details, you can click on “View” on the right side of the screen.

E. Do something else

The above actions are the only ones that can be completed through the mobile interface. If you need to enter continuing education information, upload a document, or complete a task that is not available within the mobile interface, you can select the “Go to Site” button on the bottom right of the screen, which will open a version of the desktop interface on your mobile device.

Note that it may be difficult to use the desktop interface on your device, depending on your screen size. If this is the case, you can zoom in/out to make reading easier, or wait until you are in front of a desktop computer to perform any tasks not available in the mobile interface.