User Guide for Volunteers

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Overview and Acknowledgments

The **Optima User Guide for Volunteers** is for the sole usage of programs within the network of GAL/CASA in the State of Indiana. Use by unauthorized programs is strictly prohibited.

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Welcome to Optima®

Optima is an internet-based case management computer software system specifically designed and built for Indiana GAL/CASA volunteers, staff, and directors.

Within our network of programs, Optima will provide you, the volunteer, with information about your case, 24 hours a day, 7 days a week. Optima is easy to use and will save you time in keeping track of your case.

About this User Guide

This guide is intended for volunteers to use as a reference when using the Optima case management system. It contains information on how to use features and functions that are available to manage the information pertaining to assigned cases.

The first section of the guide addresses using Optima on a personal computer. The second section covers using Optima GO® for mobile devices such as a smart phone or tablet. While the look and feel of the mobile version is different, the data displays are the same throughout. The chief difference in is the data entry process.

System Requirements – and Environment

Optima is accessed through the internet as a secure web-based case management system. Generally used by a desktop or laptop computer, Optima is also compatible with most tablets, and smart phones through Optima GO!

Compatible Operating Systems and Browsers

Optima runs on a Microsoft Windows platform as well as iOS, an operating system developed by Apple. Recommended browsers are Microsoft Internet Explorer (version 9 or higher), Microsoft Edge, Mozilla Firefox, Safari, and Chrome from Google. A high-speed internet connection is necessary for efficient operation.

How to Log On to Optima – Using a Personal Computer

Optima is accessed through the internet using a unique, secure URL (uniform resource locator) commonly known as the "web address" for each GAL/CASA program within Indiana.

The format of the URL is as follows:

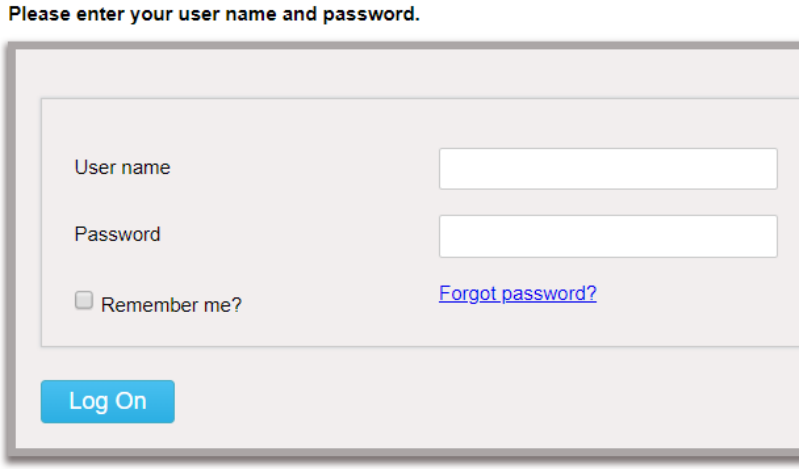
https://in-countyname.evintosolutions.com

https://	is used as the prefix to a secure web address
in-	signifies a web address for Indiana GAL/CASA programs
countyname	indicates the name of your county or unique program
.	a period separator
evintosolutions.com	is the main website location

Note: The characters "www." should NOT be in the address - those characters must be deleted.

To begin using Optima, follow these steps:

1. Open your internet browser and access your program's unique **URL** (web address). If you do not know the URL, contact your local program staff.
2. If you wish, you may want to add this address/location to your **Favorites** or **Bookmark** depending on which browser you use.
3. The welcome screen displays as shown:



The format of each Optima user's **Log On** identifier generally is the person's first name and last name. Your director or administrator will provide you with your **Log On** name.

Here is a sample: **Dottie.Davidson**

Firstname.Lastname

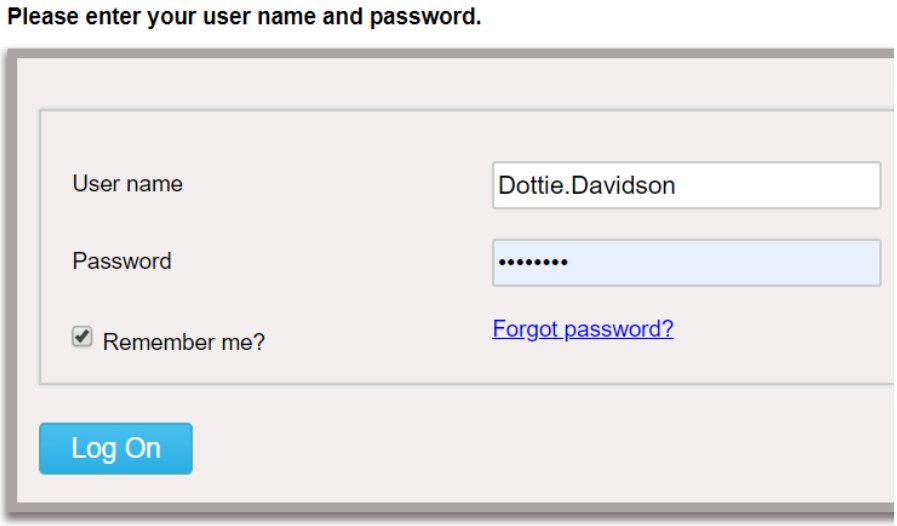
Firstname is typically the given first name of the user

. two "names" or "words" are **always** separated by a **period**

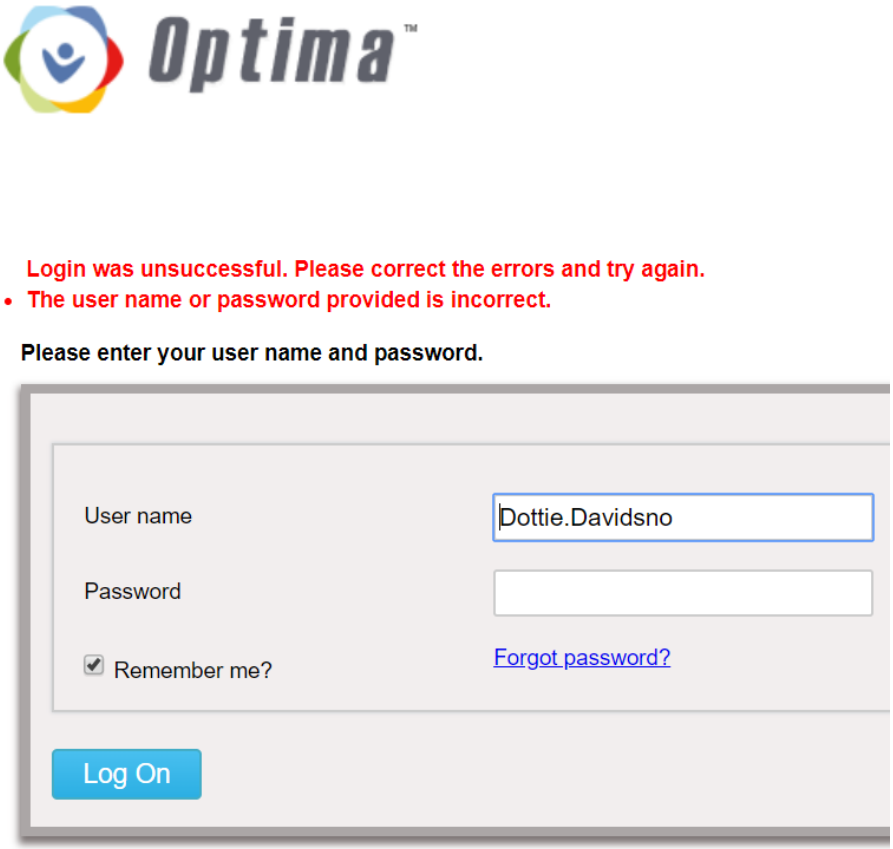
Lastname is typically the given last name of the user

1. The Log On identifier may be entered in all lower case letters, or an upper case letter at the beginning of each name/identifier.
2. The initial password is given by the local program administrator. The first time you logon, Optima will direct you to a screen where you will be prompted to create a new password that follows certain rules.
3. By clicking the **Remember me?** box, ☑ the password can be stored on the user's computer or device and will not need to be entered at subsequent Log On sessions. Users should never store the password on a public device or one that is used by unauthorized persons.
4. A user may change the password by clicking on the Reset my password link.

To activate Optima, press the **Log On** button.



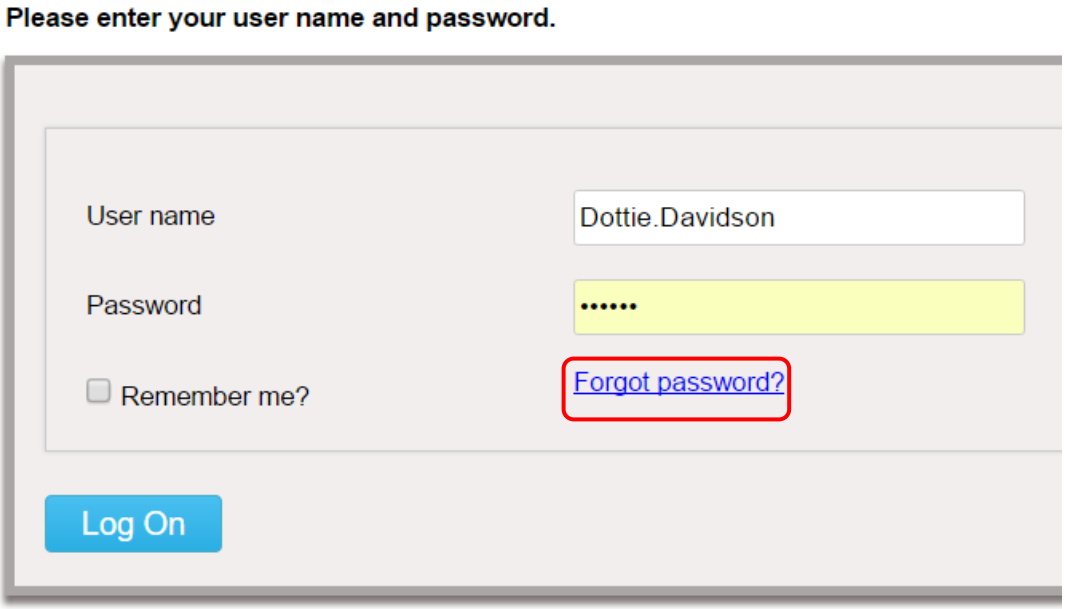
If a **User Name** and/or **Password** are entered incorrectly, a screen will display as shown with an error message. The user should re-enter the **User Name** and **Password** at least one time – there may be a typing error. If the user is still unable to **Log On**, the administrator, supervisor, or staff should be contacted to assist.



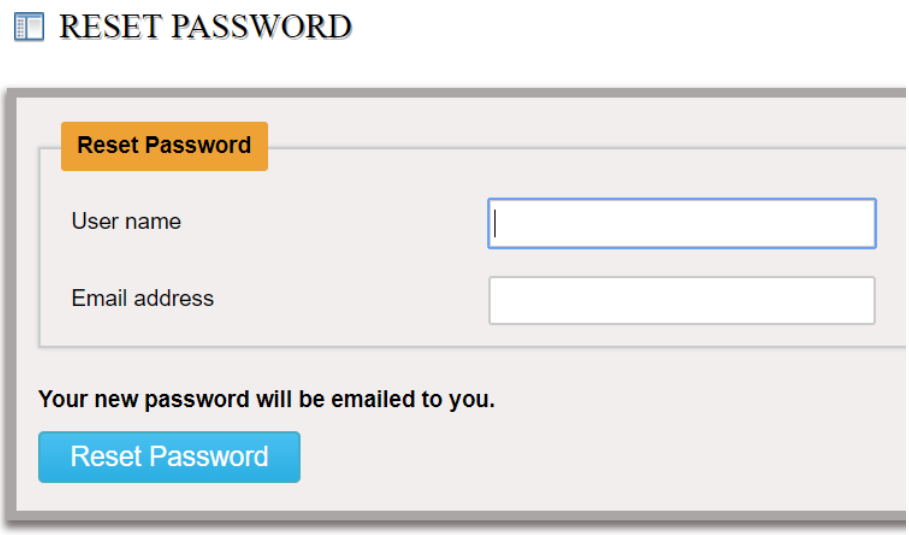
User Passwords

A **Password** may be changed in two places. It may be changed at **Log On** time – see illustration below:

By clicking the **Remember me?** box, ☑ the password can be stored on the user's device and will not need to be entered at subsequent Log On events. A user may also click on the **Forgot password?** link. An email will be sent to the user with instructions on resetting the password.

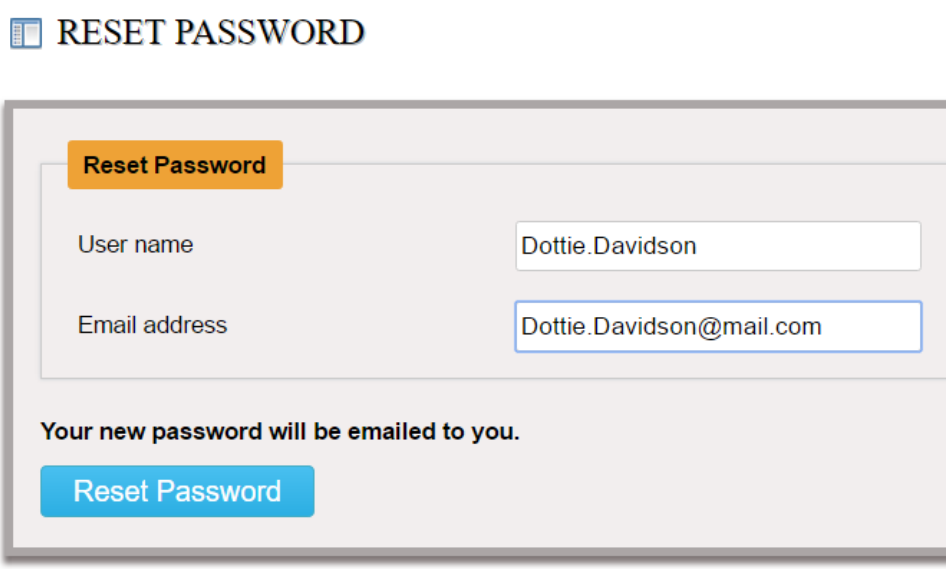


When re-setting the password, Optima will display the screen as shown - proceed with steps 1-3.

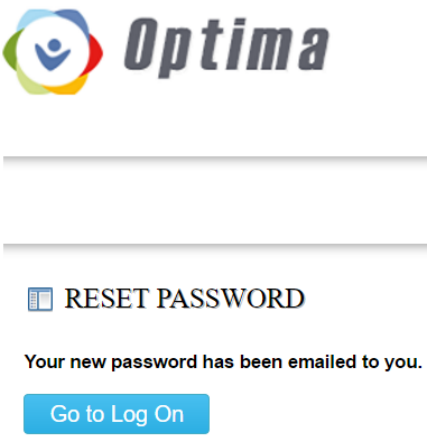


1. Enter **User name**
2. Enter **Email address**
3. Click **Reset Password**

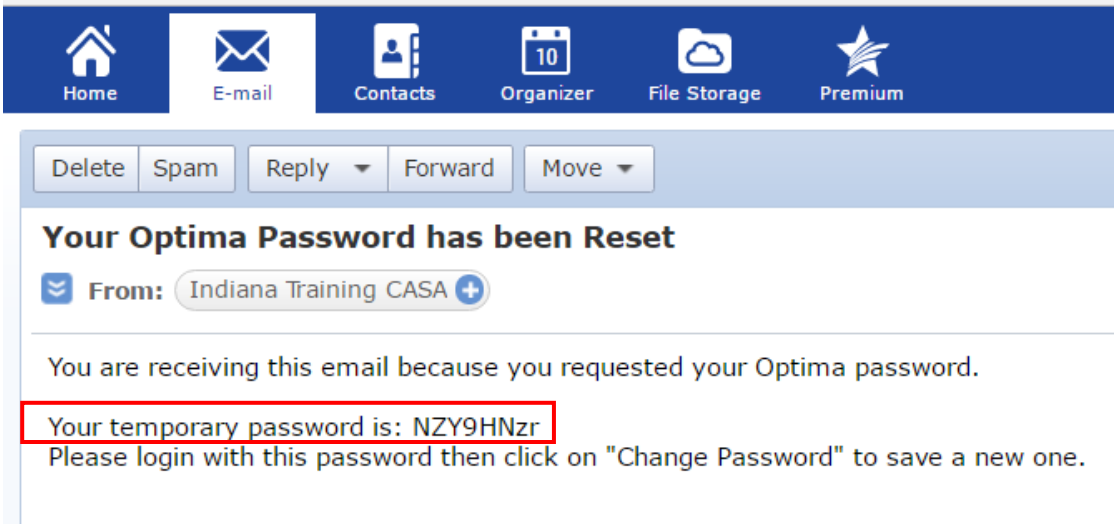
Sample:



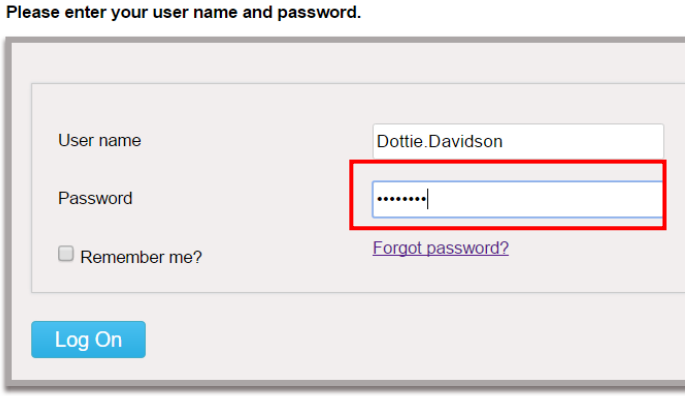
Optima will display this screen:



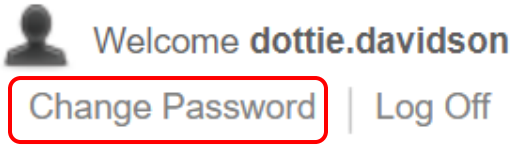
An email is then sent to the email address that was entered. A sample of a received email is shown below:



The email will contain a **temporary password.** Log On to Optima entering the **temporary password** as shown below. You should then be directed to the **Volunteer Dashboard** Welcome screen.



Another method of changing the password is to use the **Change Password** function after you have completed the Log On process, at the Volunteer Dashboard Welcome screen.

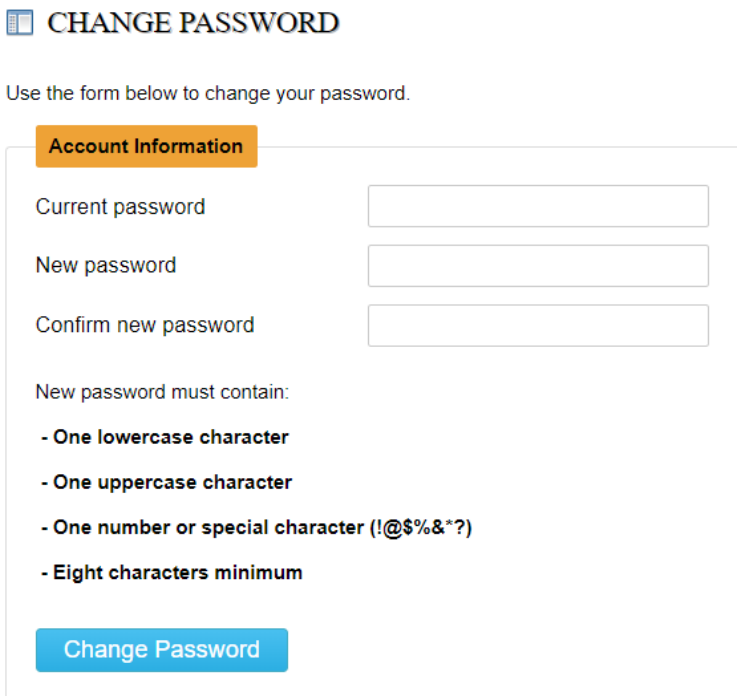


Click on the **Change Password** link in the upper right-hand corner of the screen. The following screen will appear: (note, the password format will change effective July 1, 2020)

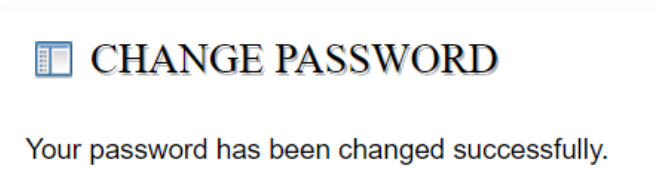
1. Enter your **Current Password.** Note: The **Current Password** is the password you most recently used to **Log On**. It might be your new **temporary** password, or it might be one that you have used previously.
2. Enter the **New Password** you have selected (8 characters minimum).
3. Include one ***lowercase*** character; include one ***uppercase*** character; include one ***special*** character using

   ! @ $ % & * ?

4. Re-enter the **New Password** you have selected to Confirm and validate.
5. Click **Change Password.**



A verification screen will appear as shown below:



If you encounter errors, please return to the beginning of the process, and try again. It may be necessary to contact your supervisor or administrator. They have the authorization in Optima to reset your password at any time.

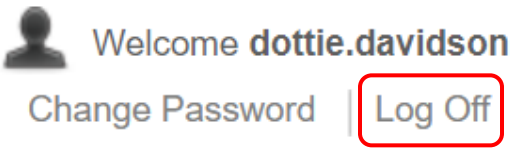
Security

Security is a chief concern when using Optima. Your database contains sensitive case data that you are responsible for when using the system. Please take care that your password is secret, known only to you. Do not share your password or Optima account with another volunteer or anyone else. Do not write down your password – just memorize it. And if other people use your computer, then don't let your browser store your password. Having your browser remember your password is just like telling everyone you know. If you see a "prompt" offering to save your login information, always answer "no" or "never for this site".

You should log off the Optima system anytime you walk away from your computer.

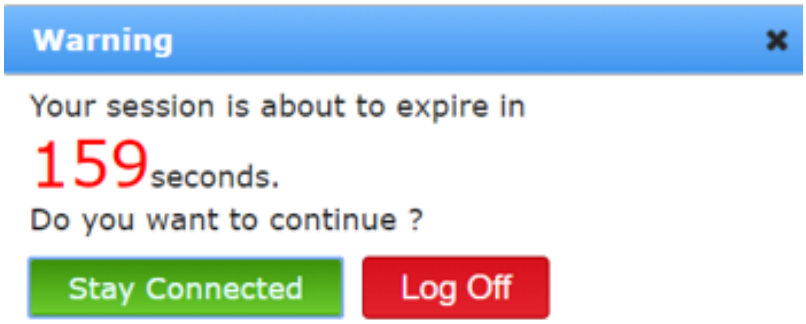
Log Off

To exit from using Optima, click Log Off in the upper right corner of any screen.



Automatic Logoff

Note: Optima will automatically log off the user from the system **60** minutes after last clicking a menu item, button, link, or action icon. A count-down timer will appear 5 minutes before logging off, giving you an opportunity to stay connected. Any transactions that have not been completed, such as a Contact Log, will not be saved.



Graphics and Icons and Screen Advancing

Optima uses several standard **icons** and **graphic** symbols throughout the system.

Icons are generally located in the **Action** area.

This is an **EDIT** or **CREATE** icon. Hovering over the icon with a mouse pointer will cause a pop-up legend to appear with specific information. Generally, it allows the user to make changes to an item or series of items. Not all items in Optima have edit capabilities and not all users have editing privileges.

The “magnifying” or “spy” glass symbol is primarily used to **VIEW** a specific item, to inspect deeper, or to expand. Pausing over the icon with a mouse will cause a pop-up legend to appear for specific information.

This is a **DELETE** icon. Positioning the mouse pointer over the icon will cause a pop-up legend to appear with specific information to verify the delete action. The delete function is limited to certain items and not all users have the delete level of privilege.

Screen Advancing

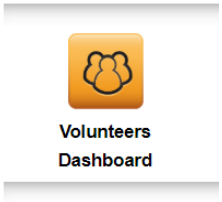
There are sections of information that have multiple entries which cannot be displayed effectively on one screen. The icons illustrated above move the screen forward and backward.

From left to right, the actions are: ⏮ **return to the beginning of the list**; ◀ **go back one screen**; ***the page number display***; ▶ **go forward one screen**; ⏭ **go to the end of the list**.

The “**Displaying items**” message indicates the number of items that are currently being viewed and if there are more to be seen.

A filled **triangle symbol** ▲ or ▼ indicates the column of data can be sorted by clicking on the column title.

Volunteers Dashboard



The Volunteers Dashboard is the “home” or main screen that appears when first logging on to Optima. If lost during navigation, one can always return “home” by clicking on the Volunteers Dashboard icon.

At this location, there are a series of tabs that will be helpful in using additional features of Optima. Those tabs are:

The **Cases** tab is activated by default and shows a list of assigned cases.

The **Training Logs** tab allows volunteers to view their in-service training and add new items when they are completed.

Non-Case is where volunteers can enter activities that are not related specifically to their case, such as attending a social event, or promoting CASA or community event.

The **Calendar** will show important dates such as court hearings or Child and Family Team meetings. Volunteers can add events as they wish.

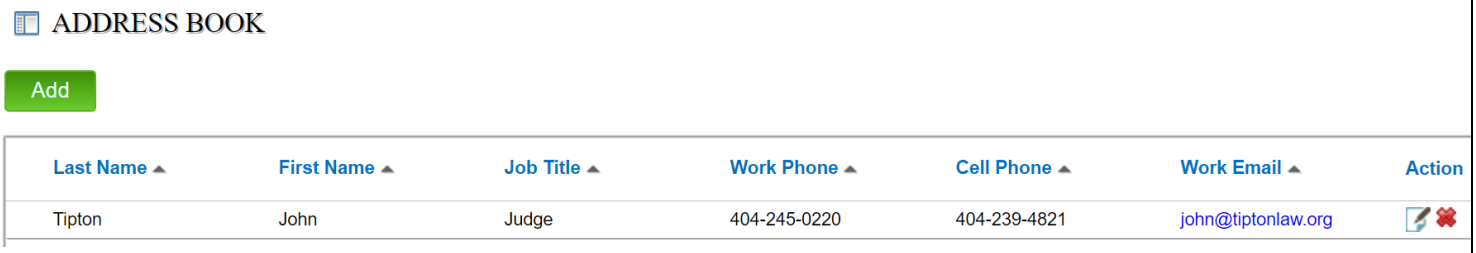
New Docs is where volunteers will find a list of documents that have been added to their case(s) in the last 14 days.

The **Address Book** and **Personal Info** functions are also available at the Volunteers Dashboard location as well as a **Help** function. These items are covered within this user guide.

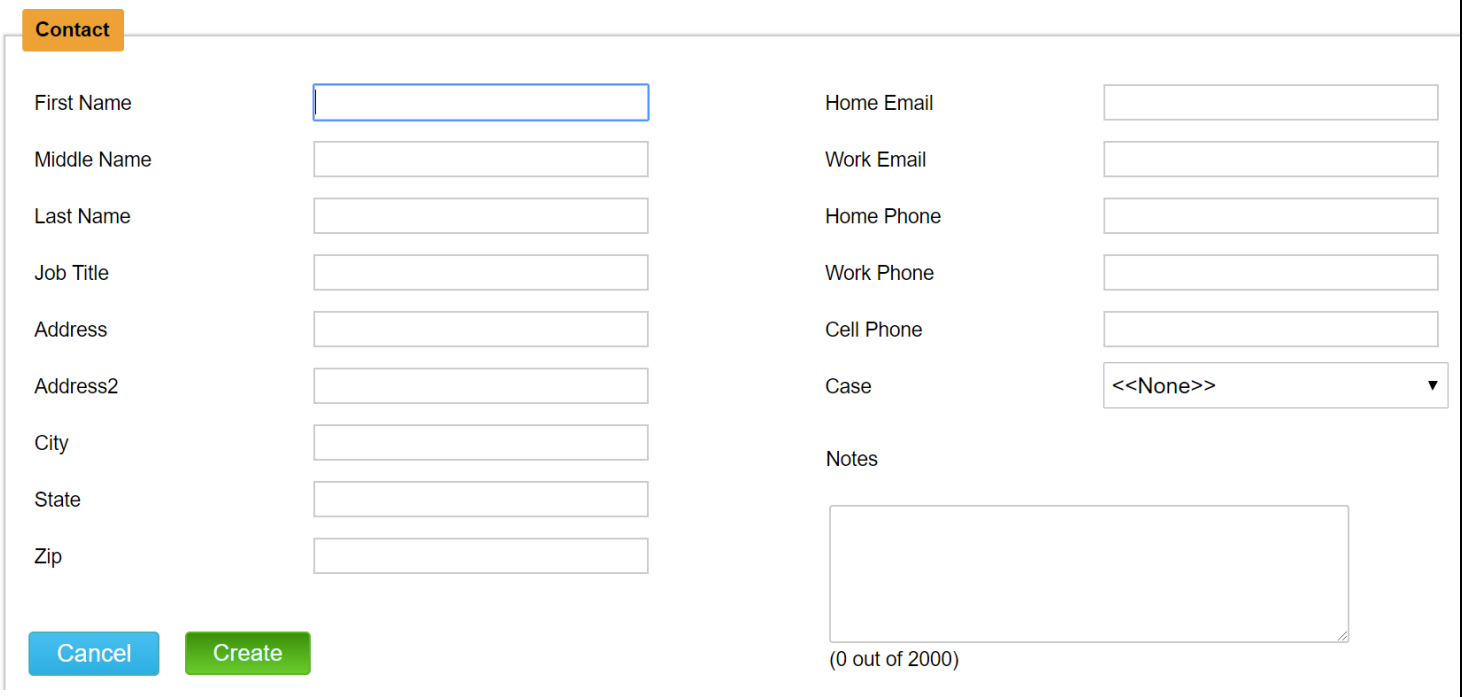
Address Book – Overview and Entry

The **Address Book** allows the volunteer to create an electronic address book to use which will store names, addresses and other contact information. The address book is **not** linked to any information within the case(s).

By clicking on Address Book, a screen will display a list of entries as shown:

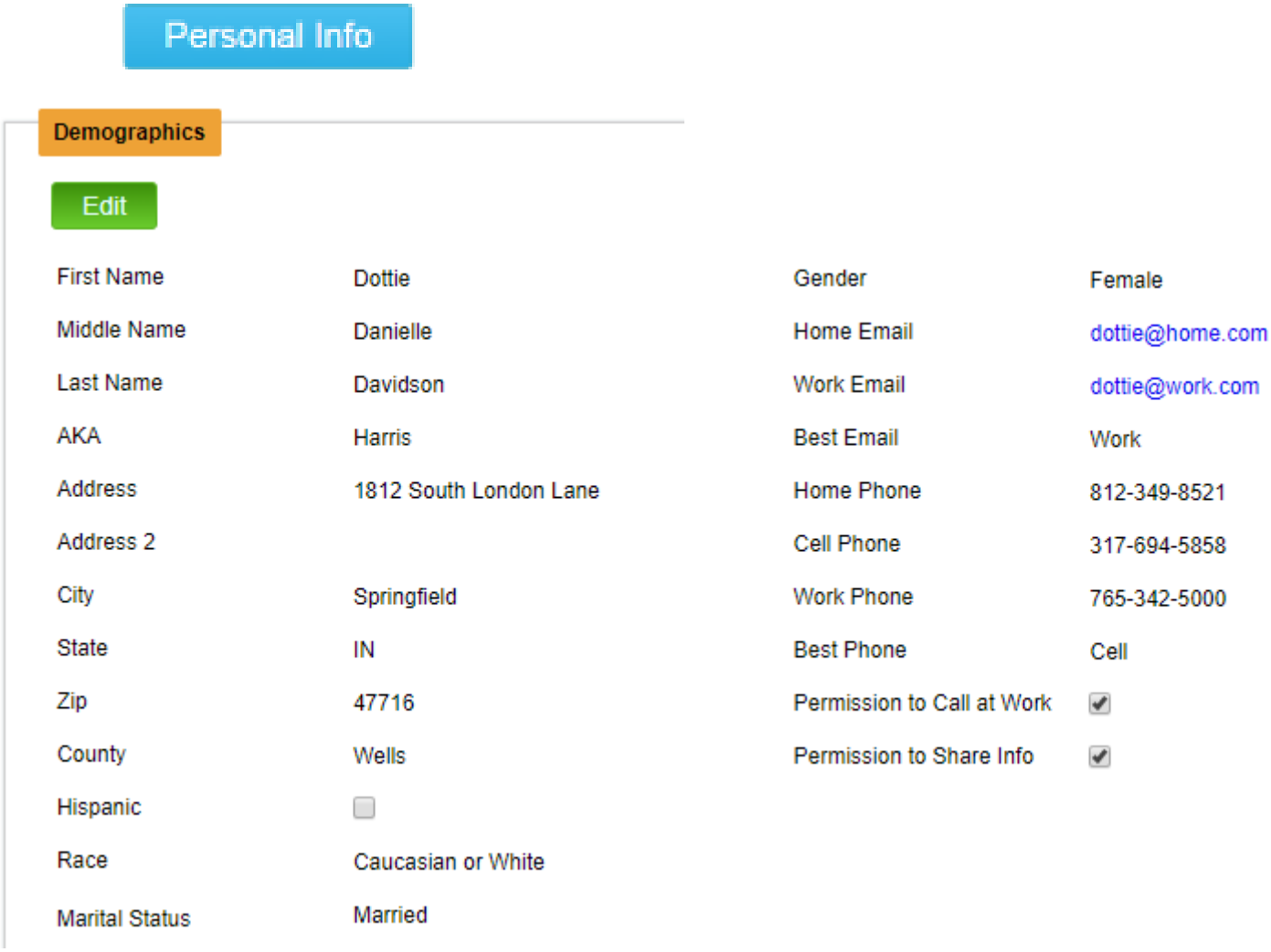


The list displays the **Last Name**, **First Name**, Jo**b Title**, **Work Phone**, **Cell Phone**, and **Work Email** of the entry. To view additional information or make changes, click on the **Edit** icon adjacent to the entry. To delete an entry, click on **X**. To add an entry, click on **Add.** Enter the name information, address and other data in the provided input locations. Enter The **CaseID** is a reference to **Case Numbers** that the volunteer is assigned. If desired, choose the case number from the selection menu. Click on **Create** or **Cancel**.



Personal Info – Overview and Entry

The Personal Info function allows a volunteer to edit demographic information – see display below. This section can only be viewed by the local GAL/CASA program staff. It is not shared outside the organization. Click on **Personal Info**, and then click on **Edit** to make changes.



Edit Demographics

First Name	Dottie
Middle Name	Danielle
Last Name	Davidson
AKA	Harris
SSN	211-93-5594
Address	1812 South London Lane
Address 2	
City	Springfield
State	IN
Zip	47716
County	Wells
Hispanic	☐
Race	Caucasian or White
Marital Status	Married

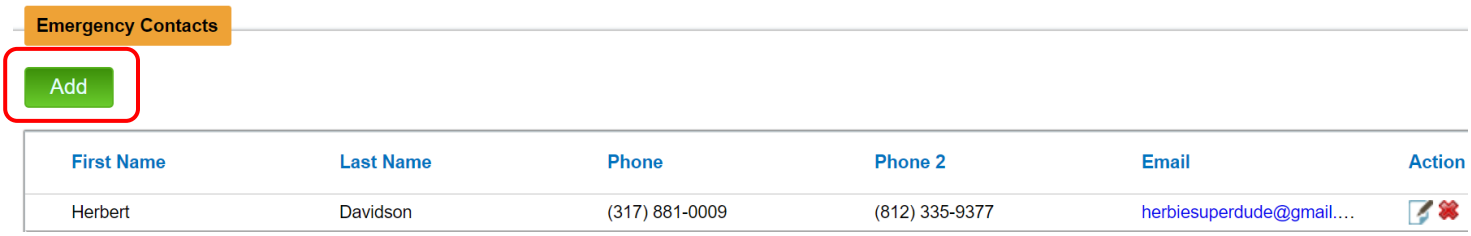
Gender	○ Male ◉ Female
Birthdate	3/2/1965
Home Email	dottie@home.com
Work Email	dottie@work.com
Best Email	Work
Home Phone	812-349-8521
Cell Phone	317-694-5858
Work Phone	765-342-5000
Best Phone	Cell
Permission to Call at Work	☑
Permission to Share Info	☑

Cancel Save

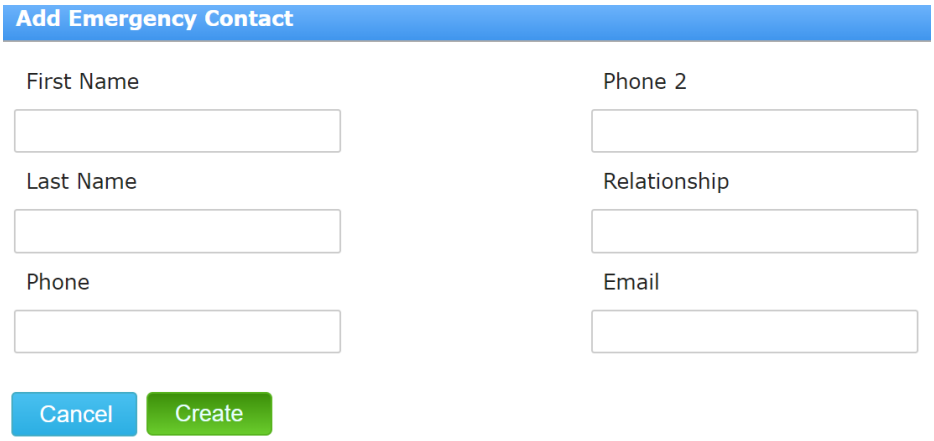
Make changes as needed to the data fields shown above and click **Save** when completed.

Personal Info - Emergency Contacts

Beneath the **Volunteer** Demographics area, there is a section to record **Emergency Contacts** information regarding the Volunteer. To enter data, click on **Add**.



A data entry screen will appear



Enter the **First Name** and **Last Name** of the person to contact in case of an emergency.

Enter the best **Phone numbers** to reach this person.

Identify the **Relationship** between the volunteer and the individual.

Enter the person's **Email** address.

Click Create when completed.

Changes may also be made to Emergency Contacts by selecting the **Edit Action** icon, making the changes and clicking on Save.

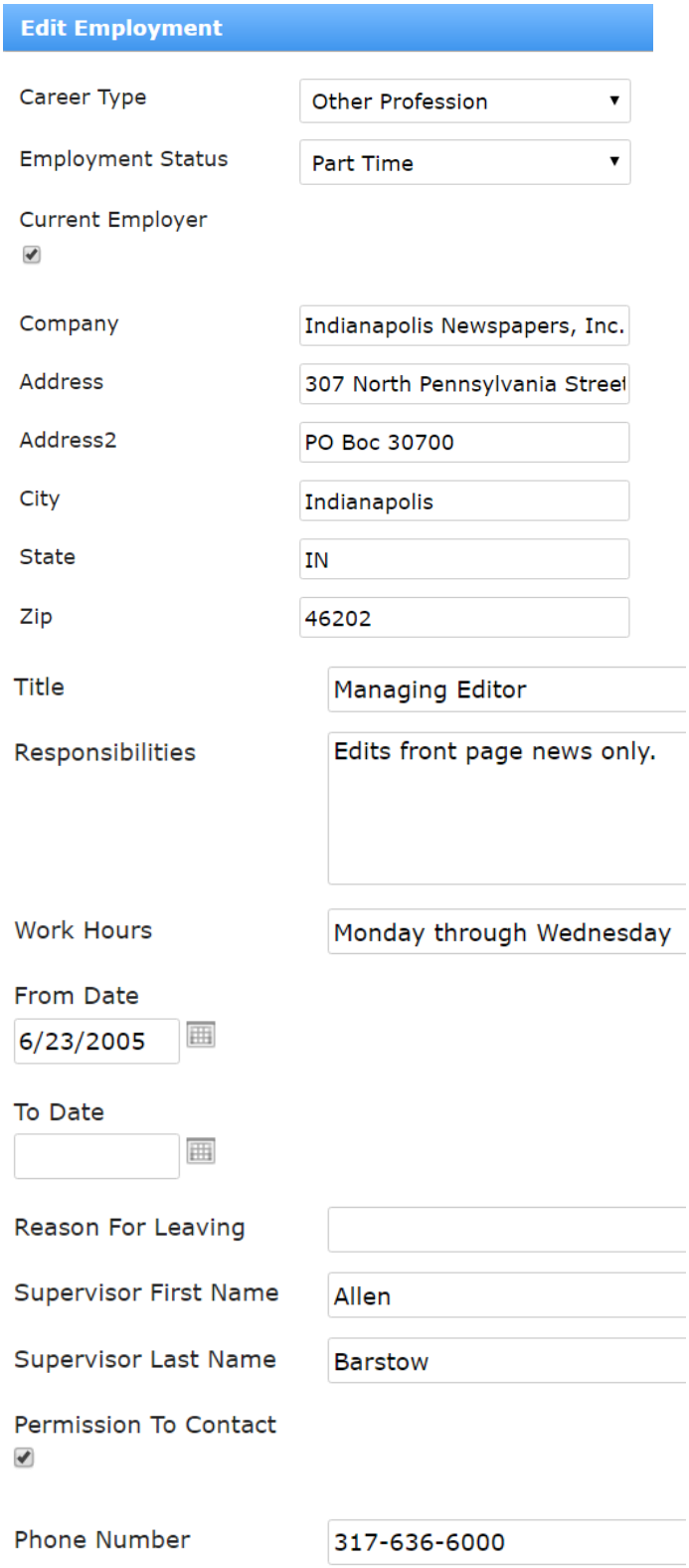
Personal Info – Current Employment

A volunteer may edit the **Current Employment** details in the individual's record, click on **Add** or **Edit** as shown. A data entry screen will appear.

Choose the individual's **Career Type** and **Employment Status** from the selection menu and Indicate if this is the Individual's **Current Employer.**

Enter the **Company** name **Address** and other location Information.

Enter the individual's **Title**, **Responsibilities**, **Work Hours**, **From Date**, **To Date**, **Reason For Leaving, Supervisor's First** and **Last Name**, Check the **Permission To Contact** indicator if Appropriate, Supervisor's **Phone Number**. Click on **Save**.



Training Logs - Overview

Each volunteer is required to continue advocacy-related training by completing 12 hours of education per year. Depending on your local program, accumulating hours can consist of attending seminars, workshops, and conferences. It is the responsibility of the Volunteers in most programs to keep track of their training activities

A Volunteer has full editing capabilities of training log items they enter. All training log entries must be approved at some level of administration.

Training Logs - Activating this tab will display a list of Training Log activities that the volunteer has completed, both approved and pending. It also displays the YTD (year-to-date) number of hours spent in training and YTD number miles that the volunteer has reported through the training activity log.

Complete Date shows when the training finished

Training Topic indicates the subject of the training

Hours indicates the number of hours expended

Mileage shows the number of miles driven to and from and training event

Status shows if the training has been approved or is pending

Action allows for viewing of additional information

Training Logs – Create an Entry

Click on **Add** and the following screen will appear:

Enter the **Schedule Date** and the **Complete Date** or use the calendar icon to select.

Click on **<<Select a Value>>** and choose a **Training Topic** from the selections.

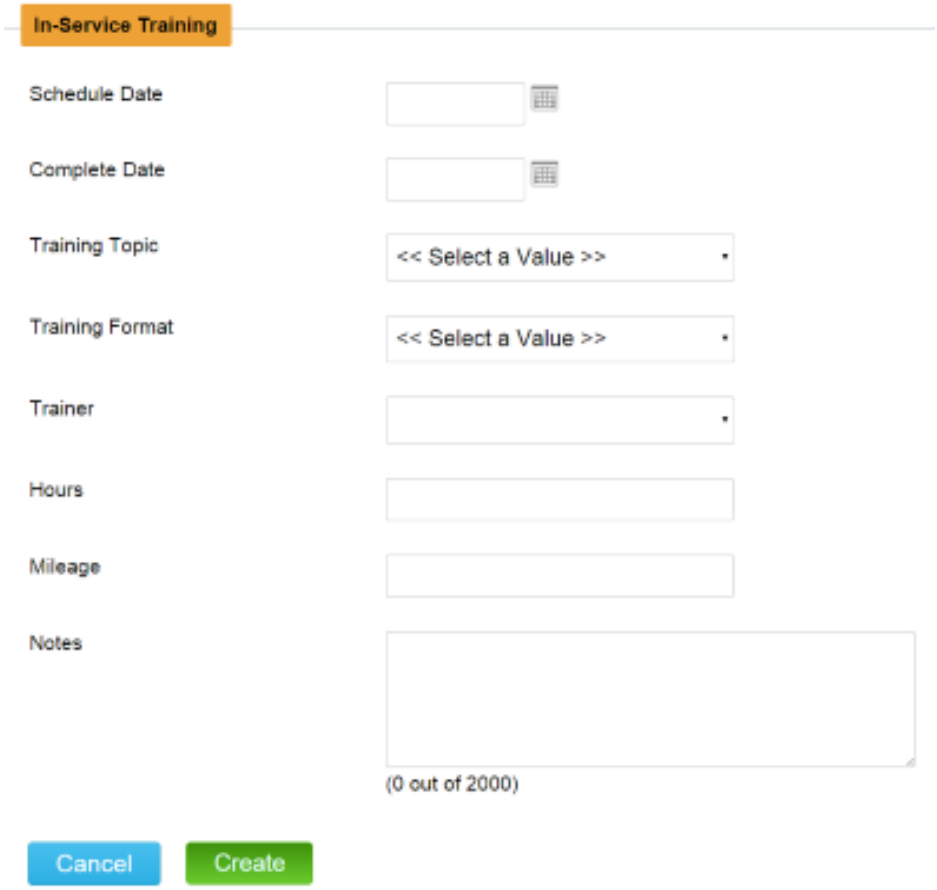
Click on **<<Select a Value>>** and choose a **Training Format** from the selections.

Choose a **Trainer** from the selections.

Enter the number of **Hours** attended.

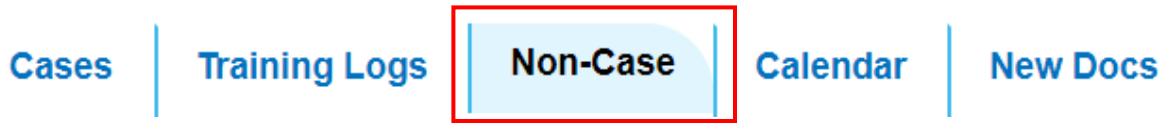
Enter the number of **Miles** driven to/from the event per your program's guidelines.

Enter **Notes** and click on **Create**.



Important Note: If the **Training Topic**, **Training Format**, or **Trainer** values are not in the selection menus, contact the local program director and request an update.

Non-Case Activity – Overview - Create an Entry

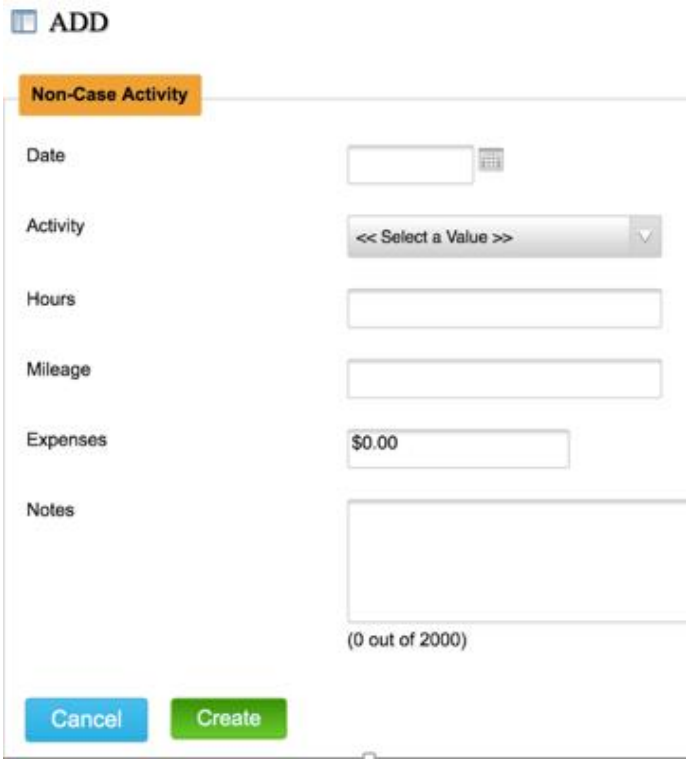


There may be times when a Volunteer performs activities that do not relate to a specific case. However, your program will want to keep a record of those activities to show a better view of efforts made to support your organization.

Volunteers may enter and update their respective entries. The Non-Case screen displays the date of past events, the name of the event, the number of hours, the mileage driven, and an action section where the entry may be edited or deleted.

Date	Event	Hours	Mileage	Action
8/01/2018	Passed out CASA brochures	55		
6/20/2017	National CASA Project	2.5		

To add an entry, select the **Non-Case** tab and click on **Add**. The following data entry screen will appear.



Enter the **Date** of the activity in the space provided or use the adjacent calendar.

Choose the **Activity** from the selection menu by clicking on **<<Select a Value>>**

And enter **Hours**, **Mileage** and **Expenses i**ncurred.

Notes may be entered in the **Notes** section. Click on **Create**.

Important Note: If the **Activity** values are not in the selection menus, contact the local program director and request an update.

Calendar - Overview

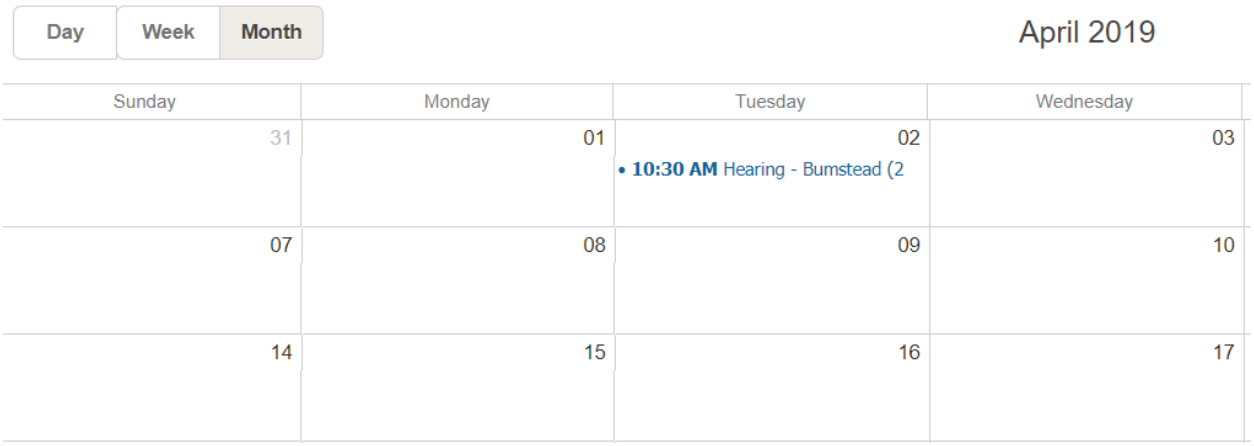
The Calendar Function allows volunteers to view upcoming hearings, training events, non-case activity events, and any other important dates to be aware of.

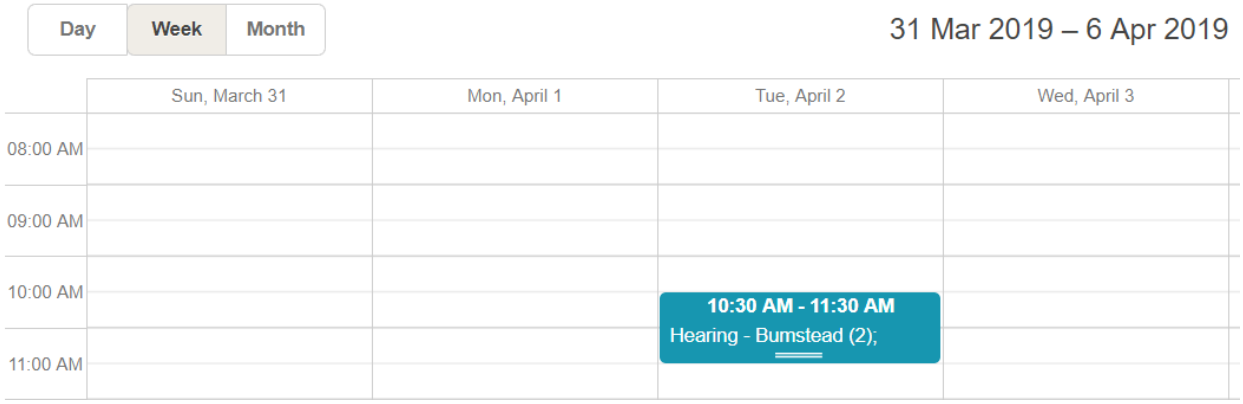
Some of the calendar entries appear automatically such as upcoming hearings. Once a hearing event is created, it will be displayed with the date and time.

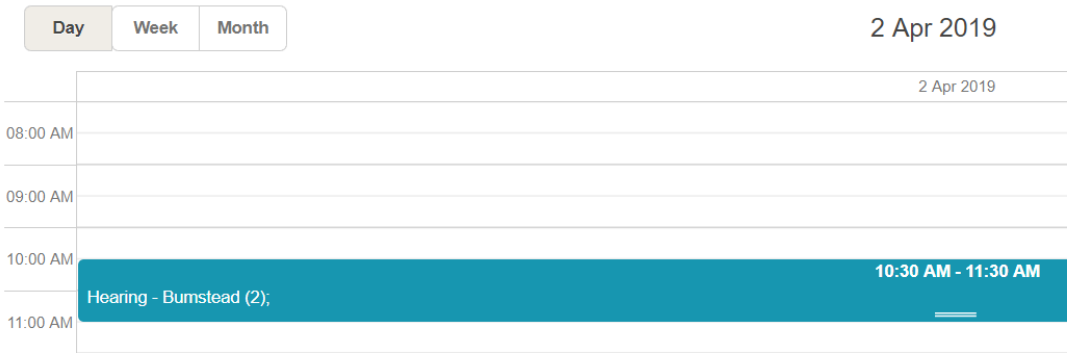
Creating training events or meetings, such as Child and Family Team Meetings can be added to the calendar. Staff and supervisors have the option of selecting which individuals should attend.

The calendar can be viewed by agenda, by volunteer, by week or my month and by day. Volunteers have update capabilities for events they create or are linked to.

The calendar can be viewed by agenda, by volunteer, by week or my month and by day.

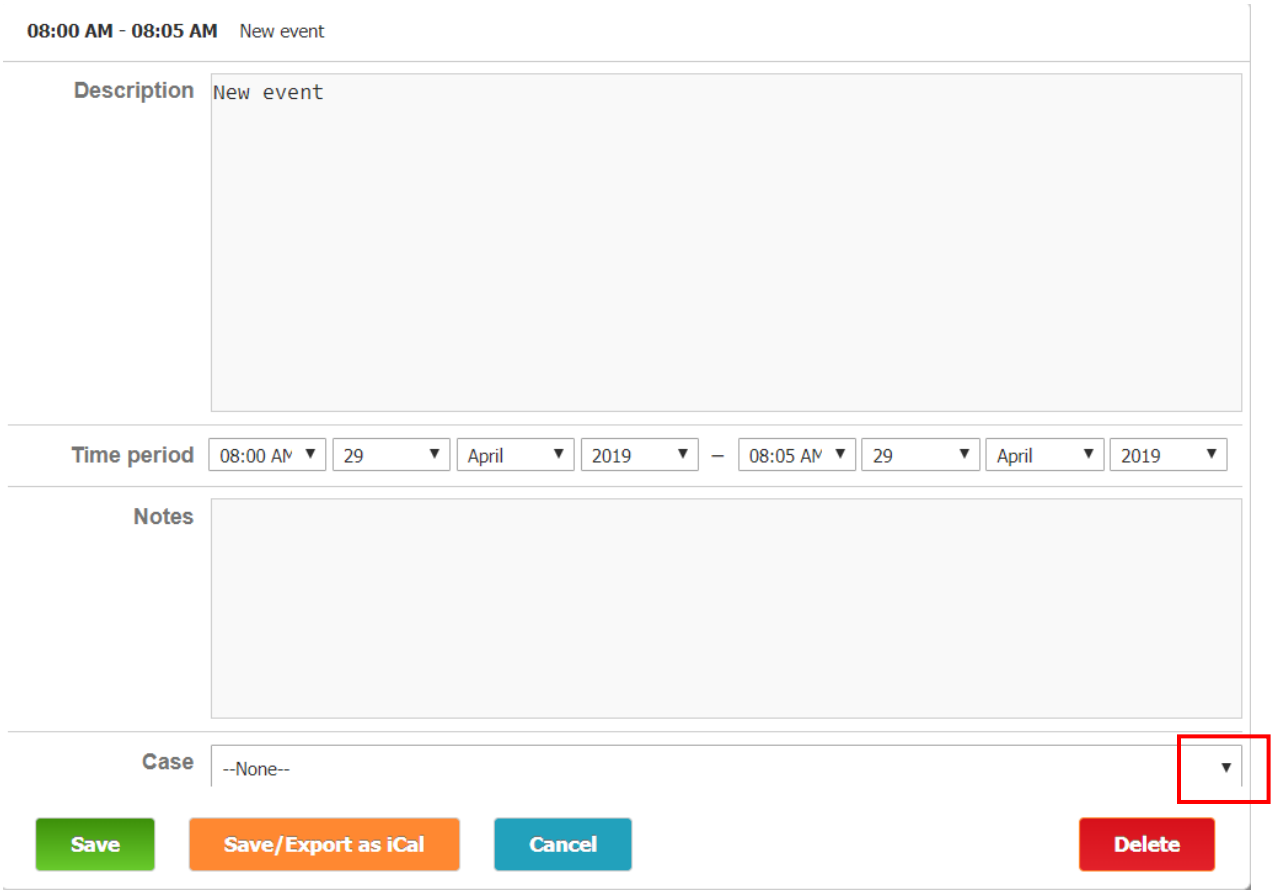






Calendar – How to Enter an Event

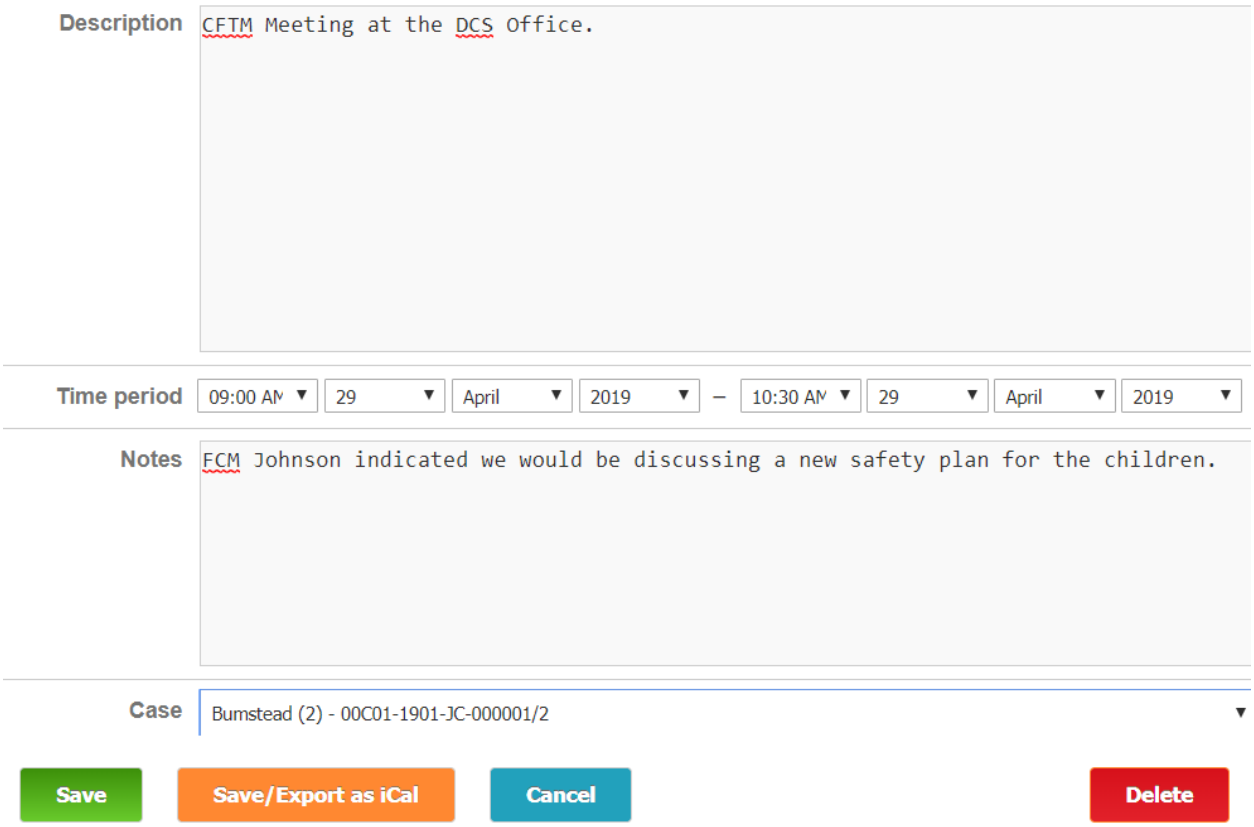
To create an event on the calendar, double-click on the day of the event. A new screen will appear:



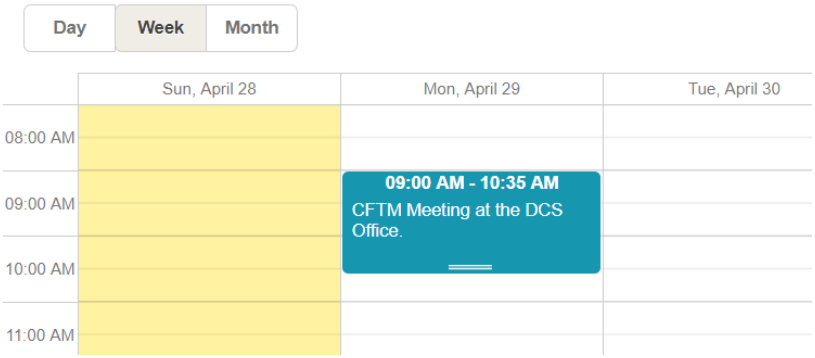
Enter the description of the event; adjust the time period if necessary and add any appropriate notes in the notes section.

If the event pertains to a certain case, click on the down arrow in the Case section, and your assigned cases will appear to select from. Once the data has been entered, click Save.

Below is an example of a data entry screen with a new calendar event.



And below is how the event appears on the calendar:



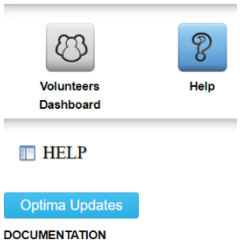
Calendar events can be deleted or modified.

New Docs

New Docs will show the most recent documents that have been uploaded to a case within the past 14 days based on upload date.

Case Number	Case Name	File Name	Document Type	Added By	Add Date	Action
00C01-1901-JC-000001/2	Bumstead (2)	Triage Data.xlsx	Other/Miscellaneous	Davidson, Dottie	4/28/2019	

Help Function

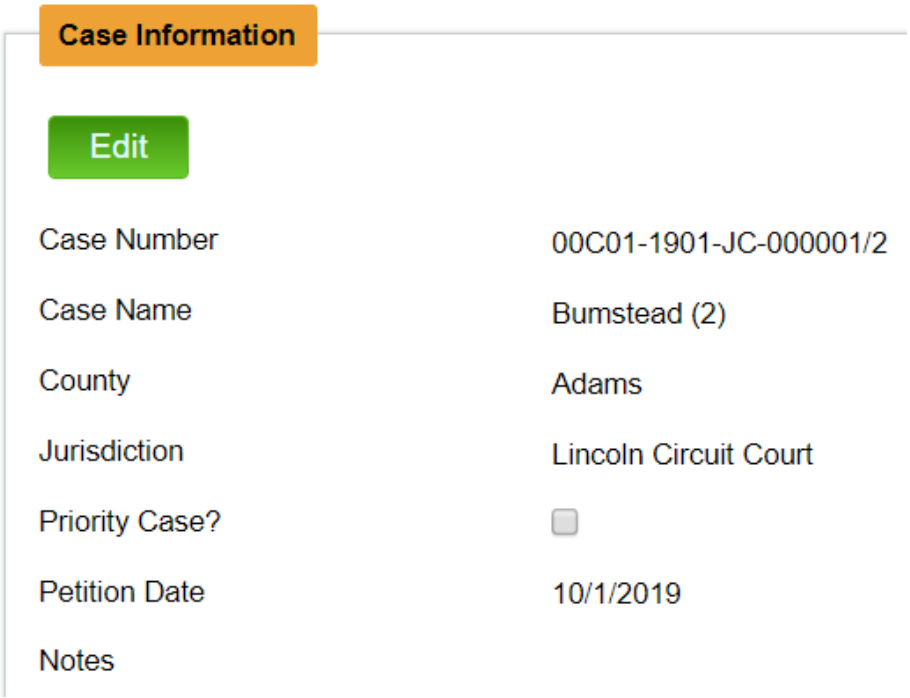


The Help function will display a list of updates to the Optima system. It is managed by the Optima organization and updated periodically. If volunteers need assistance with any function or feature within Optima, they are to contact their local program staff directly. Please do not contact the Optima staff.

Case Information – Overview

Case Information

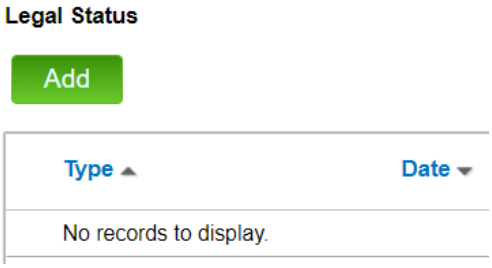
Case Information is the section where the basic facts of the case are displayed: the case name and number, the county where the case is assigned and the date of the petition. This data rarely changes once the case has been created. The Volunteer can only "view" this information.



The **Case Information** display shows the:

- **Case Number** – the number assigned to the specific case
- **Case Name** – the name associated with the case
- **County** – the county where the case is located
- **Jurisdiction** – the jurisdiction of the case – often the County name/number
- **Priority Case?** – indicates if the case is a priority
- **Petition Date** – the date of the petition
- **Notes** – any notes entered when the case was created of interest

The **Legal Status** section is not generally used



Case Assignment – Overview

Case Assignments

The **Case Assignments** area shows who is assigned to advocate for the child, or children. In addition, if the local program has supervisors or other type of advocate, they will be listed. The information contains the dates of assignment and other data. The Volunteer has "view" permission only.

Case Assignments

Name	Type	Supervisor	Assigned	Released	Reason	Contact Info
Supervisor, Sally	Supervisor	☑	1/1/2019			317-831-4562 supervisor@mycounty.in.
Davidson, Dottie	Volunteer	☐	3/28/2019			317-694-5858 dottie@work.com

The **Case Assignments** section indicates the name(s) of the Volunteer(s) and/or Supervisor assigned to the case.

Name – Name of the individual
Type – Indicates the type of individual
Supervisor – Indicates if this particular individual has supervisory privileges
Assigned – the date the individual was assigned to the case
Released – the date the individual was released from the case
Reason – the reason the individual was released from the case
Contact Info – the best phone number and best email address to contact the person

Children in Case – Overview

Children in Case

The **Children in Case** is where we find all of the details pertaining to each child. Optima is "case" based. There are several sub-sections where the Volunteer may update information regarding the **child**.

Children in Case

Name	AKA/Alias	Gender	Child Age	Close Date	Volunteer	Supervisor	Next Hearing	Action
Bumstead, Alexander		Male	2		Davidson, Dottie	Supervisor, Sally		
Bumstead, Cookie		Female	1		Davidson, Dottie	Supervisor, Sally		

The **Children in Case** area provides an overview of each child's general information.

Name – name of the child
AKA/Alias – the alias or "also known as" of the child, such as a nickname
Gender – the gender of the child
Age – the age of the child – the system calculates age based on birthdate and the date the information is viewed; a child less than one year old appears as zero
Close Date – a child's case may be closed while a sibling's case remains open
Volunteer – name of volunteer(s)
Supervisor – name of supervisor
Next Hearing – date of the next hearing (may not always show here)
Action – allows viewing details of the child

Current Placements – Overview

Current Placements

The **Current Placements** shows where each child is currently housed. Their placement may be with a relative, a foster home, a residential center or other. The address and contact information of the placement is available in this section.

The Volunteer has some limited editing capabilities. Changes in placement can be made, however, this is usually done by the administrative staff of the local program.

Current Placements

Add

Name	Placement	From	Reason	With Siblings	Contact Name	Contact Info	Action
Bumstead, Alexander	Central Indiana Good Home	4/15/2019	Imminent Risk	None	Gina Williams	812-997-9441 gina@CINGH.org	
Bumstead, Cookie	In-Home CHINS	4/15/2019	Trial Home Visit	None	Bumstead, Dagwood		

The **Current Placements** section displays an overview of information regarding the placement of the child.

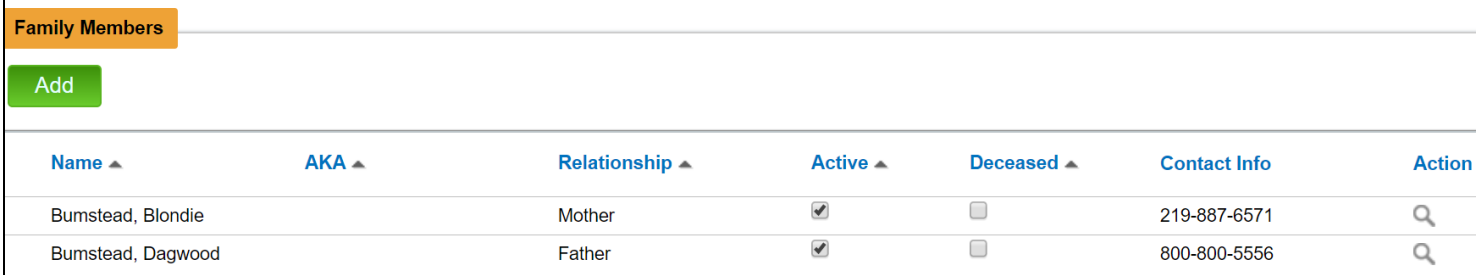
Name – name of the child
Placement – name of the person or facility where the child is placed
From – beginning date of the placement
Reason – reason child was placed
With Siblings – indicates if other siblings are placed as well
Contact Name – name of person responsible or in authority at placement
Contact Info – best phone number and email for contact
Action – allows viewing details of the placement

Family Members – Overview

Family Members

The Family Members section is where Optima stores information about the family members, the mother and father of the child. Sometimes a step-parent is found in this section if applicable, or a grandparent. Depending on your local program's guidelines, often this section is reserved only for individuals who are legal parties to the case. On the other hand, people who are closely attached to the child may be found here as well.

Although a Volunteer generally cannot add a family member, several areas can be updated as needed by the Volunteer as shown. Some programs do allow volunteers to create Family Members. Check with your local program director for more information.



Family Members displays an overview of information regarding the key family members in the case.

Name – name of family member
AKA – "also known as" – could be a nickname, maiden name, inmate number
Relationship – relationship between this individual and the child
Active – indicator that person is still active with the case
Deceased – indicator that person is deceased
Contact Info – best phone number and email for contact
Action – allows viewing details of the family member

Note: Some programs all volunteers to enter new family members or edit family member information. Check with your local program to see if those features are available to you.

Case Details – Tabs Section – Overview

At the bottom of the display will be a series of what appear to be “tabs” of a file folder.

Behind each tab you will find information of greater detail. The tabs are:

Contact Logs – this is the most active area for a Volunteer. All of the Volunteer’s notes and activities regarding the case are recorded here.

Associated Parties – there are often several people who are associated with a case other than family member. This section stores data regarding the caseworkers, attorneys, counselors, therapists, teachers, clergy, and so forth.

Wellbeing – Only used in specific programs.

Documents – each case generally has many documents that are important to the case. Where multiple children are involved, the number of documents can grow dramatically. This section is where you will find copies of all case documents.

Petitions and Allegations – this section contains the petition and allegation information – it does not contain the actual document(s) – they would be stored in the document area. This data provides who the allegations are against.

Hearings – each court hearing for the case is listed here. Optima maintains a history of the hearings and the orders that relate to each one, who attended, etc.

Placement History – similar to the Placement section, this area provides a complete history of placements for each child from the beginning of the case.

Contact Logs - Overview

Add

View Notes Search

Name	Type	Subject	Date	Hours	Status	Action
Supervisor, Sally	Contact with DCS (FCM or other)	Call with Harriett	4/23/2019	0.5	Approved	

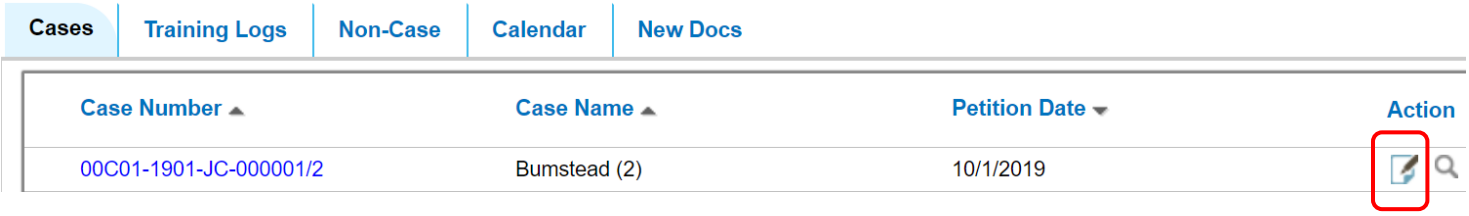
Contact Logs displays an overview of each contact log that has been entered regarding the case.

Name – the person, generally the volunteer, who entered the log
Type – type of contact
Subject – topic of contact
Date – date the contact occurred
Hours – number of hours spent
Status – indicates if the entry has been approved or is pending
Action – allows for editing or deleting

Contact Logs – How to Enter

Contact Logs are created when an event occurs that pertains to the case. This could be a visit with the child, the parents, attending a Child and Family Team Meeting, attending a court hearing, reading an email, making a phone call, etc. In other words, anything that a volunteer does regarding the advocacy of the case should be recorded in a contact log. The log gives the local and state GAL/CASA programs a way of knowing how many hours volunteers donate in addition to documenting valuable information about the case.

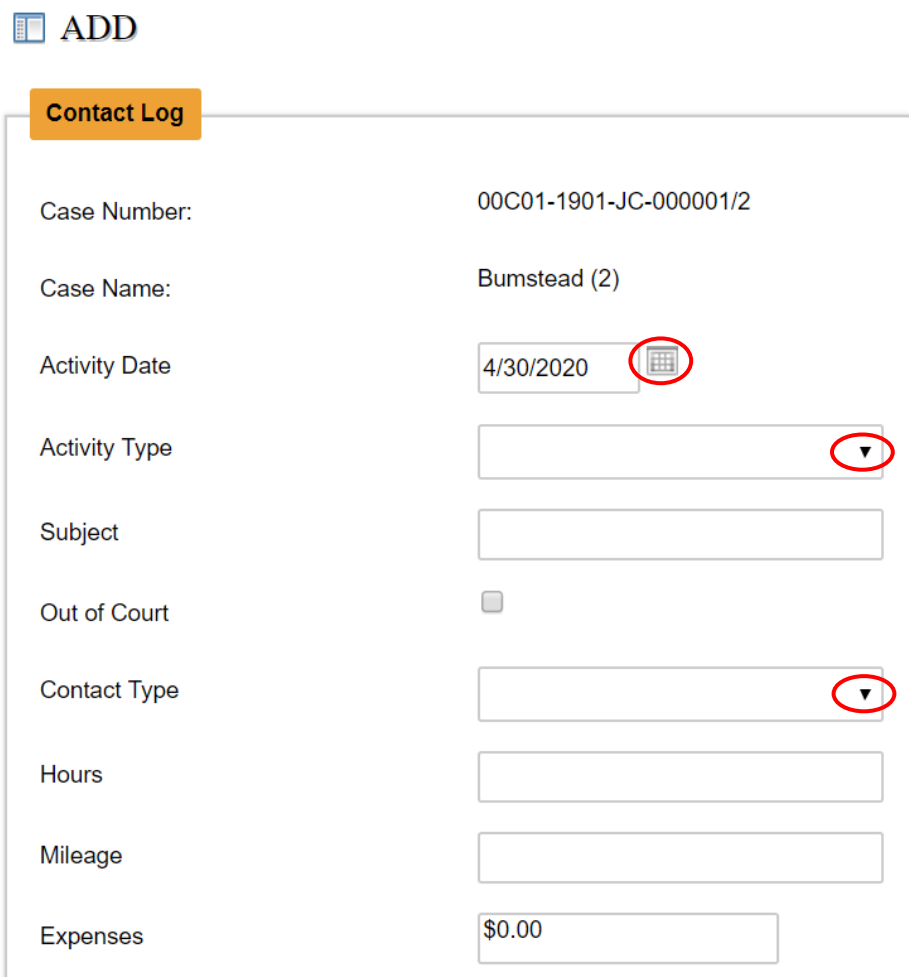
To enter a contact log, navigate to the Contact Log section within the appropriate case. To do this, click the Edit icon to the far right of the case as shown at the Volunteer Dashboard.



This action will open a blank Contact Log form ready for data entry.

Another way to open a Contact Log form is to navigate to the tabs section within the case and click on Add under the Contact Log label as shown:

Case Number and **Case Name** will automatically appear.
Activity Date can be typed in or selected from the calendar icon.
Activity Type is a selection menu – click the arrow to see the list of choices.
Subject is a free-form text box to uniquely identify the event or activity.
Out of Court indicator box is not used.
Contact Type is a selection menu – click the arrow to see the list of choices.
Hours - enter the number of hours in decimal format.
Mileage – enter the number of miles driven if appropriate.
Expenses – enter any expenses if appropriate.



The Notes box is where the case notes are entered. It is recommended to write the notes in complete sentences, avoiding abbreviations. The text is not spell-checked, or grammar checked. Notes may be entered in Word and then copied/pasted into the box. There is a character counter at the bottom of the box to alert the writer when the capacity is near the 5,000-character limit.

The **Select** box is checked adjacent to the name of the individual the contact log pertains to; the Party Type is reference information on the role of the individual.

Select	Pertains to	Party Type
☐	F. Lee Bailey	Attorney
☐	Harriett Harwell	Caseworker
☐	Alexander Bumstead	Child
☐	Cookie Bumstead	Child
☐	Blondie Bumstead	Family Member
☐	Dagwood Bumstead	Family Member
☐	Basil Exposition	Principal

The **Others Contacted:** section allows for entry of three additional individuals who the contact log pertains to or person(s) contacted. The **Relationship** entry defines how the person is associated with the case.

Others Contacted:

First Name

Last Name

Relationship

To complete the entry of the Contact Log, click **Create**. <u>The Contact Log is not saved until the Create function has taken place.</u>

Cancel Create

If you have a lengthy note to enter, consider typing the note in your word processor and saving/editing within a document. When finished, then copy/paste the text into the notes box of the contact log.

The following graphic gives additional information about the various data fields within a Contact Log.

Case Number	The case number will appear for verification
Case Name	The case name will appear for verification
Activity Date	The actual date of the event; or an arbitrary date used to enter multiple activities such as a week's worth of emails – **required**
Activity Type	Choose from the selection menu - **required**
Subject	Free-form text to describe the event; a unique label; optional but helpful
Out of Court	Not needed; may skip over
Contact Type	Choose from the selection menu - **required**
Hours	Entered in decimals; 15 minutes (.25) is the **minimum** amount 30 minutes = .5 60 minutes = 1 75 minutes = 1.25 90 minutes = 1.5 - **required**
Mileage	Optional – whole numbers
Expenses	Optional – dollars and cents
Notes	5,000 characters, about 800 words; if note is lengthy, create in Word first, spell-check, then copy/paste into note; try to write complete sentences to use for court reports; **required**
Cancel	Pressing Cancel terminates the creation of the note or stops the process
Create	Create produces the note and saves it in the case file; **required**
Select Pertains To	Check ☑ the name of the person(s) the contact log pertains to; names come from the child section, family member section, and associated party sections; generally **required**
Others Contacted	Provides space to enter names of other persons contacted not listed above; requires entering data in two of the three available lines per contact
First Name	First name of other person
Last Name	Last name of other person
Relationship	Relationship of this person to the case

Note about Hours: Hours are entered in decimal format. The **minimum amount of time is .25 which equates to 15 minutes.** Even if the activity is less than 15 minutes, the amount of time would still be .25. The only time that zero hours would be appropriate would be if the event did not consume any time, which would be rare. Please do not enter hours less than .25 without speaking to a representative from the local GAL/CASA program.

Associated Parties - Overview

Name	Association	Type	Company	Chilc	Famil	Release	Contact Info	Action
Bailey, F. Lee	Attorney			☐	☑	☐	218-456-7812 flee@flee.com	
Exposition, Basil	Interested Party	Principal	Britannia Elementary	☑	☐	☐		
Harwell, Harriett	Caseworker		DCS	☑	☑	☐	317-244-9514 Harriett.Harwell@d	

Associated Parties displays a list of other individuals who are typically non-family members. This group consists of caseworkers, attorneys and interested people such as a therapist, landlord, or another service provider.

Name – name of individual
Association – identifies relationship to the overall case
Type – category of association
Company – organization individual is affiliated with
Child – indicates if the associated party relates to the child
Family – indicates if the associated party relates to the family
Released – indicator the associated party is no longer involved
Contact Info – best phone and email address to contact
Action – allows for detailed view

Note: Some programs all volunteers to enter new associated parties or edit associated party information. Check with your local program to see if those features are available to you.

Documents - Overview

File Name	Document Date	Add Date	Document Type	Action
Exception Reports - Volunteers - Quick Reference.docx	2/25/2019	2/27/2019	Notice Of Hearing	
Permanent Plans.docx	1/14/2019	2/24/2019	Order Approving Permanency Plan	

Documents displays a list of documents pertaining to the case that have been uploaded and stored for reference.

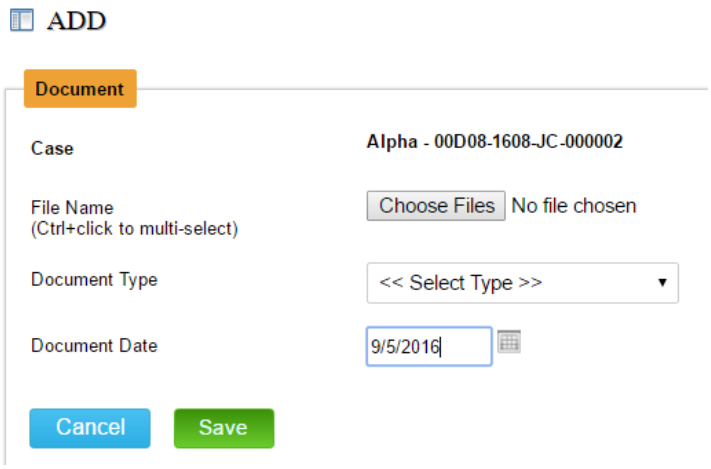
File Name – name of file that was uploaded
Document Date – date the file was created
Add Date – the date the document was uploaded
Document Type – category of document contents
Action – allows for viewing

Documents – How to Add

To add a Document to the case, click on **Add**

A data selection screen will appear. Select the **File Name** by clicking on the **Choose File** selection button. You will need to know where the file is located before starting this process. It may be on a network drive, a hard drive on a computer, or was scanned and saved in a location.

Then select **Document Type** from the **Select Type** menu and modify the **Upload Date** if necessary. Then click on **Save.**



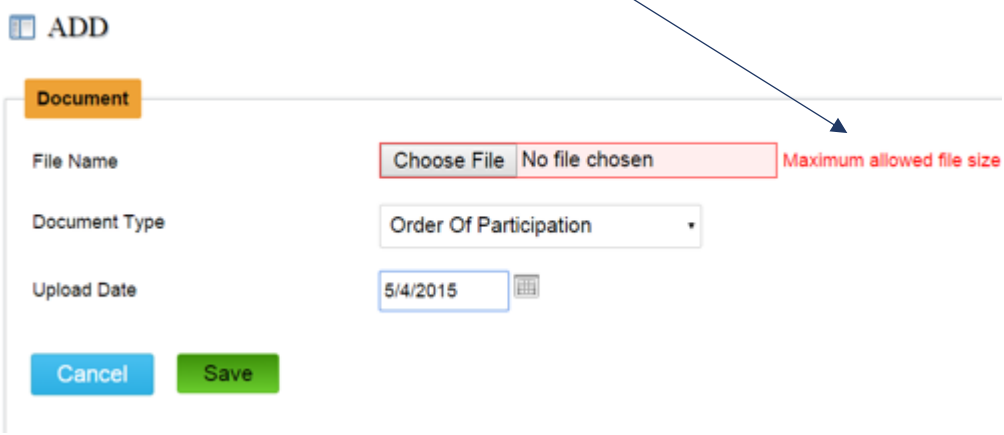
You may upload **multiple documents** at the same time**. However, they must be the same document type, and for the same case**. To upload multiple documents, press and hold the **Ctrl** key while selecting documents from the source file. The size limitation remains the same for each document.

Document Size - Important Note

The size of a document, in terms of “bytes” is very important. At the present time, Optima can accept about 5 megabytes of data. Or in terms of kilobytes, 7,000. This equates to around 30-35 pages of typed materials. If graphics are included, the number of pages may need to be smaller.

If you are scanning a very large file, separating it into two, perhaps three, separate “documents” should work. You would then re-name them as “part-1” or something similar such as “page 1-28” and “page 29-47” etc. then upload them individually. Consider lowering the resolution on your scanner, if possible, to 200 dpi. Also, set your scanner to B&W (black and white) and NOT color.

If you happen to attempt to upload a document that's larger the 5,000 KB (5 megabytes) you will receive this error message:



Remember that a document with graphics typically will be much larger than a document that contains only text.

Petitions and Allegations - Overview

Petition No.	Name	Petition Date	Petition End Date	Type	Action
59C01-1712-JC-000331	Bumstead, Alexander	4/8/2019		JS	
59C01-1712-JC-000331	Bumstead, Cookie	4/8/2019		JS	

The **Petition and Allegations** section shows each petition per child as relates to the case.

Petition No. – the court-assigned number (cause number)
Name – name of the child on the petition
Petition Date – date the petition was filed
Petition End Date – date the petition ended
Type – category of petition
Action – allows additional viewing of details

Hearings - Overview

Date	Time	Report Due	Location	Hearing Type	Judge	Status	Action
5/15/2019	11:45 AM	5/8/2019	Circuit Court	Dispositional	John Tipton	On calendar	

Hearings displays an overview of all hearings related to the case.

Date – date of the hearing
Time – beginning time of the hearing
Report Due – due date of the volunteer's report
Location – location of hearing
Hearing Type – category of hearing
Judge – name of presiding official
Status – refers to current condition or progress of the hearing
Action – allows for additional review

Placement History - Overview

Name	Placement	From	To	Reason	With Siblings	Contact Nar	Contact Info	Action
Bumstead, Alexander	Central Indiana Good Home	4/15/2019		Imminent Risk	None	Gina Williams	812-997-9441 gina@CIN…	
Bumstead, Cookie	In-Home CHINS	4/15/2019		Trial Home Visit	None	Bumstead, Dagwood	800-800-5556	

The **Placements History** section displays an overview of information regarding the history of placements of the child.

Name – name of the child
Placement – name of the person or facility where the child is placed
From – beginning date of the placement
To – ending date of the placement
Reason – reason child was placed or removed
With Siblings – indicates if other siblings are placed as well
Contact Name – name of person responsible or in authority at placement
Contact Info – best phone number and email for contact
Action – allows viewing details of the placement

Child Details – Closer View

Details of each child can be viewed as shown below.

Case **Bumstead (2) - 00C01-1901-JC-000001/2**

Edit

First Name	Alexander
Middle Name	Beauregard
Last Name	Bumstead
AKA	Beau
Birthdate	6/6/2016
SSN	266-99-4747
ID Number	
Gender	Male
Hispanic	☑
Race	Multi-Racial
Referred By	Department Of Child Services
Referral Date	2/21/2019
Referral Reason	Trauma
Removed From Home	☑
Removed Date	2/5/2019
Removed From	Parents
Prior Placements	0
Months in Prior Placements	0
Deceased	☐

Assigned to Program	3/1/2019
Most Recent Efforts Date	

Edit Child Status

Child Status	
Status Date	
County	Adams
Geo Location	Suburban
Zip Code	47441
Notes	

Closing Information:

Program Closure Date	
Program Closure Reason	
Court Closure Date	
Court Closure Reason	
Closing Notes	

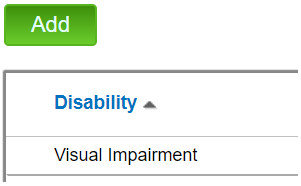
The child record also contains several tabs with additional information within. Those tabs are:

Languages | **Disabilities** | **Schools** | **Social Media** | **Eligibility** | **Placements**

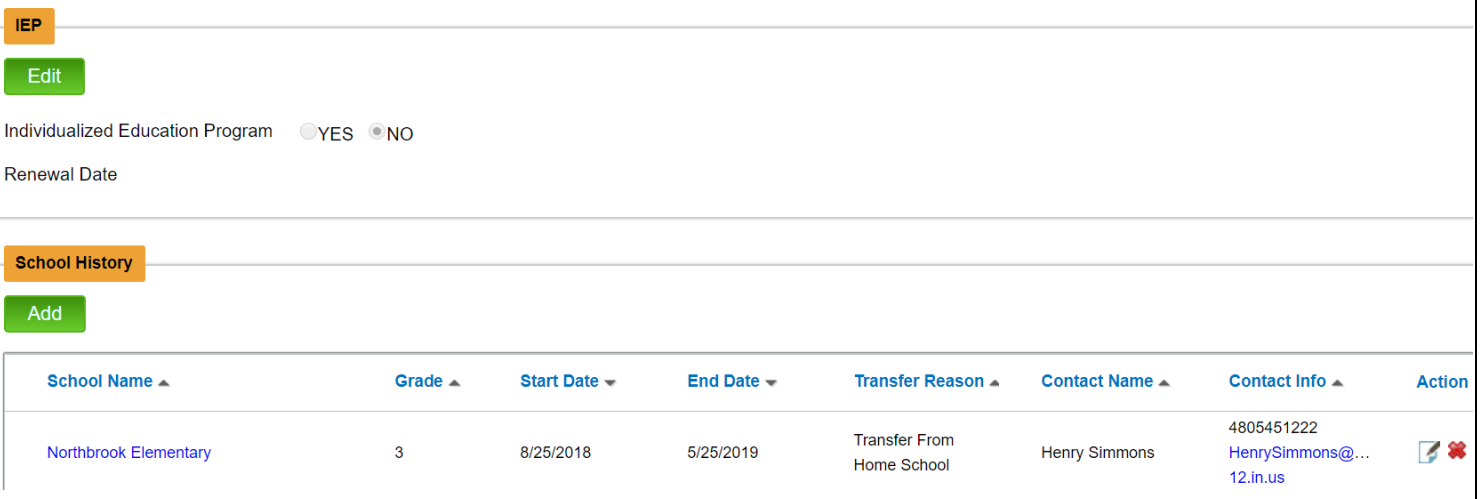
Hearings | **Services** | **Permanent Plan** | **Closing Information**

Languages: Indicates the primary and other languages pertaining to the child. Additional languages may be added as necessary.

Disabilities: Indicates disabilities pertaining to the child. Additional disability identifiers may be added as needed.



Schools: This section contains pertinent information regarding the school(s) the child attends or has attended. Volunteers can add or make changes if needed.



Social Media: This section allows tracking of the child's social media account name and which Social Media accounts are active.

Eligibility: Indicates special coding typically used by the local program to identify children enrolled in certain programs. View status only – cannot edit.

Eligible Status	Date
VOCA	4/3/2019
TPR - OPEN - Served-Volunteer	10/15/2018

Placements: Shows the history of the child's placement since the case was opened. View status only – cannot edit.

Hearing Date	Placement	From	To	Reason	With Siblings	Contact Name	Contact Info
6/6/2018	Smith, Tom and Mary	2/26/2019	2/28/2019	Imminent Risk	None	Tom Smith	317-694-8855 tomandmary@smith
	Central Indiana Good Home	4/15/2019		Imminent Risk	None	Gina Williams	812-997-9441 gina@CINGH.org

Hearings: Displays a high-level view of the hearings associated with the child. For a complete list of hearings, volunteers should navigate to the Case Details Hearings tab. This is a view only section – editing is not available.

Date	Time	Report Due	Location	Judge	Docket #	Hearing Status
6/6/2018	11:45 AM		Circuit Court	Judge Judy		Held - Completed

Services: Indicates a list of court-ordered services for the child and/or family member.

Hearing Date	Type	Family Member Name	Specified Completion Date
5/24/2018	Educational Evaluation	Aquino, Rosa	4/11/2020

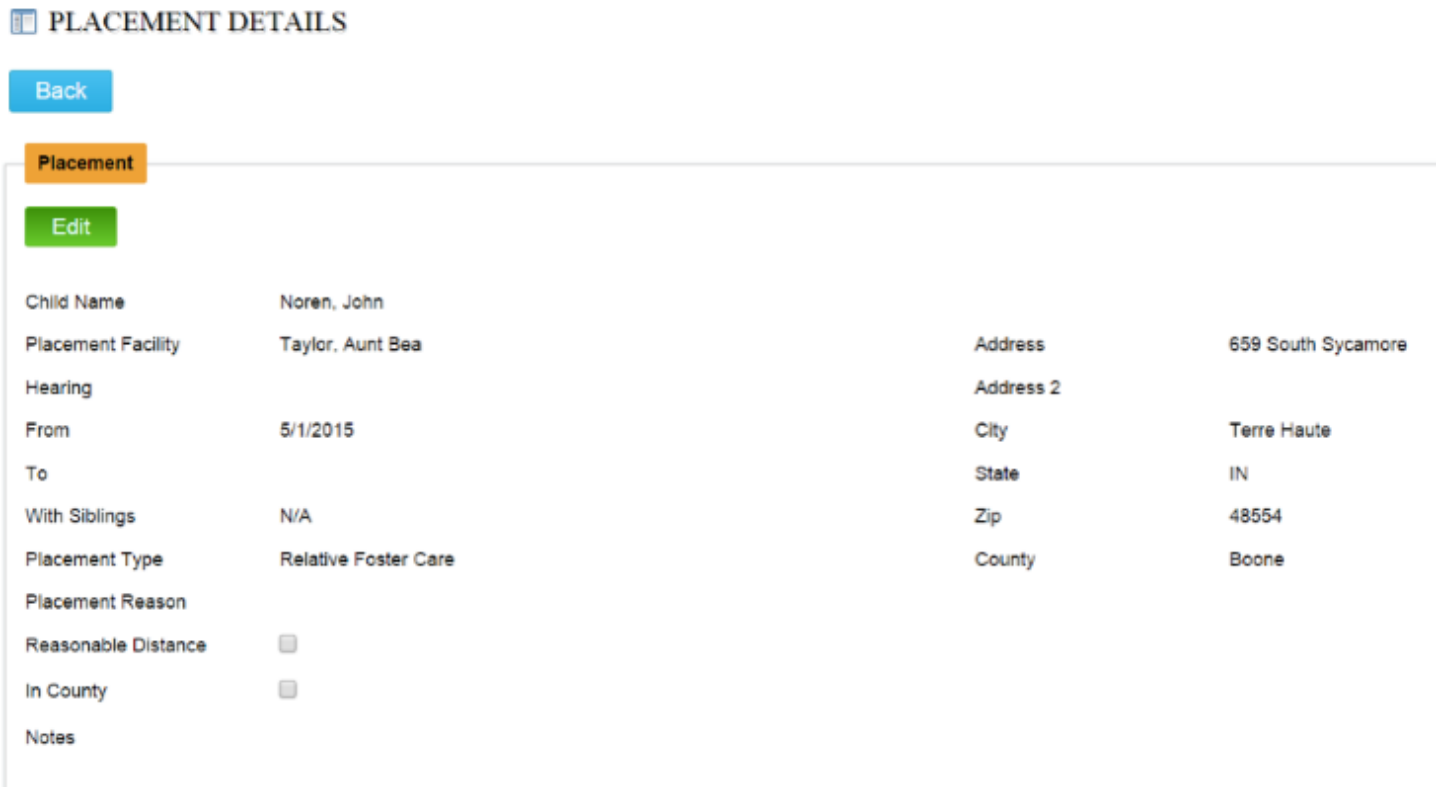
Permanent Plan: This section shows the permanent plan(s) of the child to-date. This is a view only section.

Hearing Date	Permanent Plan
4/25/2020	Reunification

Closing Information: Displays information regarding case closure of the child only.

Child Placement – Closer View

The Placement location details can be viewed as shown below:



PLACEMENT DETAILS

Back

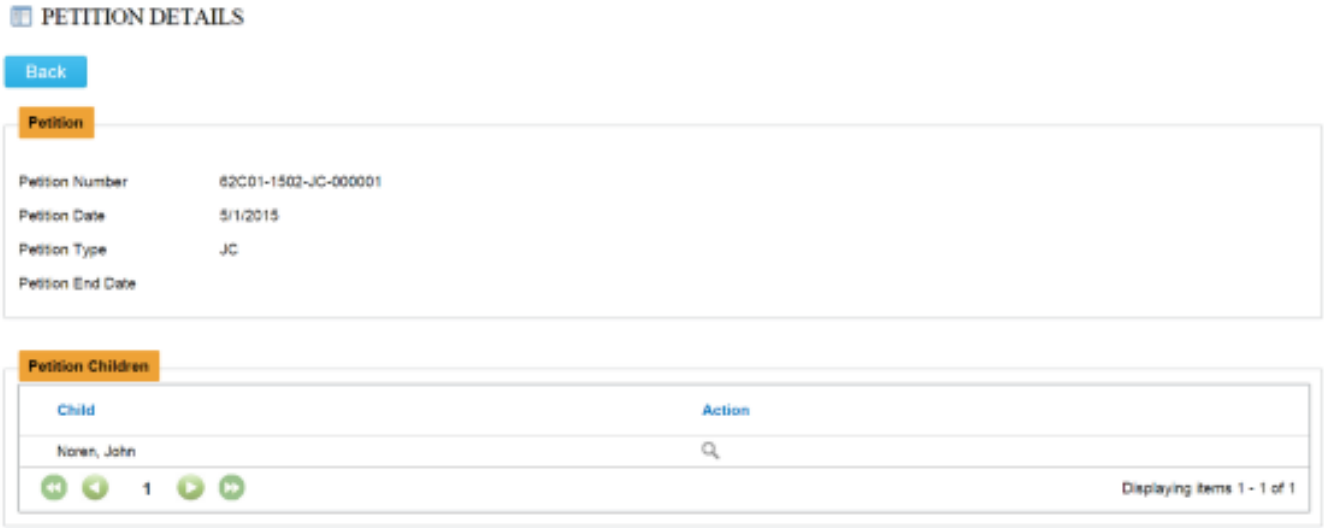
Placement

Edit

Child Name	Noren, John		
Placement Facility	Taylor, Aunt Bea	Address	659 South Sycamore
Hearing		Address 2	
From	5/1/2015	City	Terre Haute
To		State	IN
With Siblings	N/A	Zip	48554
Placement Type	Relative Foster Care	County	Boone
Placement Reason			
Reasonable Distance	☐		
In County	☐		
Notes			

Petitions and Allegations – Closer View

The details of the **Petition** are shown below:



Beneath the **Petition** is the **Allegation** section. To view the details, lick on the **View** action icon and the following screen will appear.

There will be a separate listing of each **Petition** to which the child is attached. In addition, there will be separate listings of **Allegations** to which the child is attached. It is possible to have multiple petitions (**JT, JD, GU, AD**, etc.) as well as multiple **Allegation**s against one or more individuals.

Hearings – Closer View

A Hearing contains several sub-sections. To view Hearing details, select the View icon.

Contact Logs | To Do | Associated Parties | Documents | Petitions and Allegations | Hearings | Placement History | Case Closing Information

Date	Time	Report Due	Location	Hearing Type	Judge	Status	Action
7/10/2015	12:15 PM	7/9/2015	Circuit Court	Detention/Initial Combined	Roy Bean	Continued	

1 Displaying items 1 - 1 of 1

The Hearing details screen appears as shown:

The **Hearing Details** screen shows:

The **Hearing Date** and **Hearing Time**

A **Docket Number**

The Volunteer's **Report Due** date

The **Location** of the Hearing

The current **Hearing Status**

The name of the presiding **Judge**

Dates when the **Order** was **Filed** and **Received**

Any **Notes** pertinent to the Hearing

Hearing

Case	**Bumstead (2) - 00C01-1901-JC-000001/2**
Hearing Date	4/25/2020
Hearing Time	9:30 AM
Docket Number	3551
Report Due	4/16/2020
Hearing Location	Circuit Court
Hearing Status	On calendar
Judge	John Tipton
Order Filed	1/12/2020
Order Received	1/15/2020
Attorney Attended	☐
Notes	Both parents were present. Father was arrested at the conclusion of the hearing on an outstanding warrant. The DCS region director was present.

The **Hearing Type** and **Outcomes** are indicated

Hearing Types | Hearing Types | **Hearing Outcomes**

Type	Name
Review	Continued

Additional Hearings details are shown by section:

Hearing Participants

Children | Family Members

Name
Bumstead, Blondie
Bumstead, Dagwood

Volunteer Input

Volunteer Name	Excused	Report Required	Recommends Accepted	Recommends Rejected
Jones, Harry	☐	☐		
Supervisor, Sally	☐	☐		

1

Court Ordered Services

Type	Child Name	Family Member Name	Specified Completion Date
Counseling	Bumstead, Alexander	Bumstead, Blondie	4/27/2019
Counseling	Bumstead, Cookie	Bumstead, Blondie	4/27/2019

The **Hearing Participants** section displays the **Child** and **Family Member** for whom the hearing is/was ordered. This is **not** where the actual participation in a hearing is tracked.

The **Volunteer** input section shows indicators – the **Volunteer's Name**, if the **Volunteer** is **Excused** from attending, if a **Report** is required, if the **Volunteer's recommendations** are **accepted** or **rejected**, and an indicator if **recommendations** are **Negotiated**.

The **Court Ordered Services** lists the services pertaining to both a **Child** and F**amily member** that have been ordered by the court. **Specified** and **Completion Dates** are shown.

Visitation

Family Member	Child	Type	Specified Frequency	Actual Frequency
Bumstead, Dagwood	Bumstead, Alexander	Supervised		
Bumstead, Dagwood	Bumstead, Cookie	Supervised		

Permanent Plan

Child	Permanent Plan Type	Caseworker Permanent Plan Type
Bumstead, Alexander	Reunification	Reunification
Bumstead, Cookie	Reunification	Reunification

The **Visitation** section displays the type of visitation for a specific child that was ordered by the court along with **Specified** and **Actual Frequency** parameters.

The **Permanent Plan** lists each child and the associated **Plan Type**.

Optima GO - Overview

Optima GO is the mobile device version of Optima. It is not an “app” in the sense that it is not an application that’s downloaded to a device. Rather is it the Optima case management system reconfigured to fit within the confines of mobile devices so that basic functionality and viewing remain essentially the same as the personal computer version.

Optima GO - Log On to Optima – Using a Mobile Device

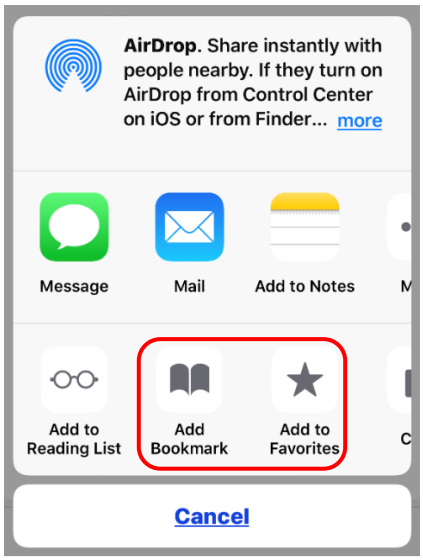
Open a browser (Safari, Firefox, etc.) and type in the URL / web address of your program:

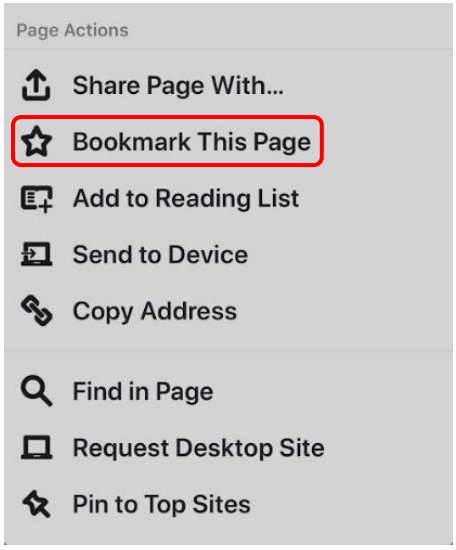
Example:

https://in-adams.evintosolutions.com

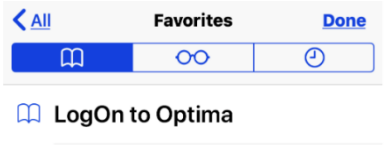
The graphic below shows signing on to the “training” Optima database.

After you have reached your program's Optima site, you may wish to SAVE the location as a BOOKMARK or as a FAVORITE on your device.





Type a name in your bookmarks of favorites that meaningful in finding the Optima icon.

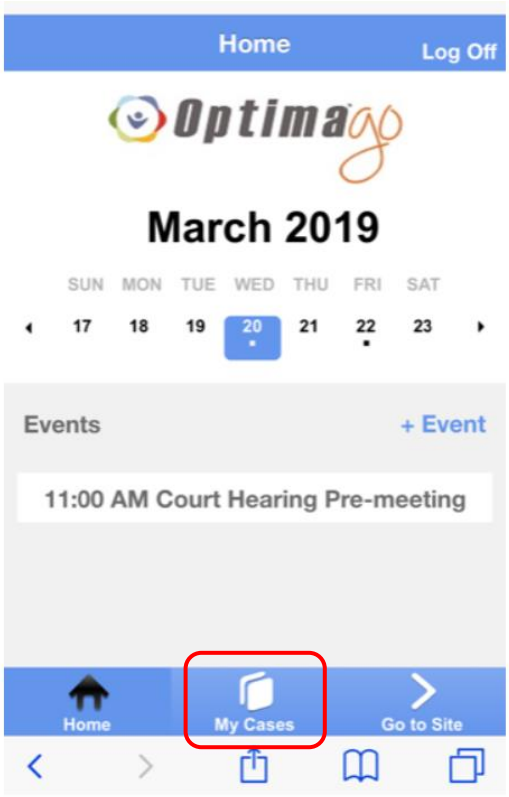


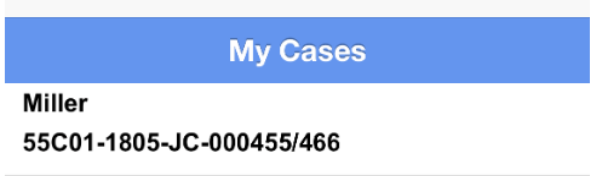
Type your **Username** and **Password** as shown and touch **Login**. This will initiate the mobile device version of Optima.

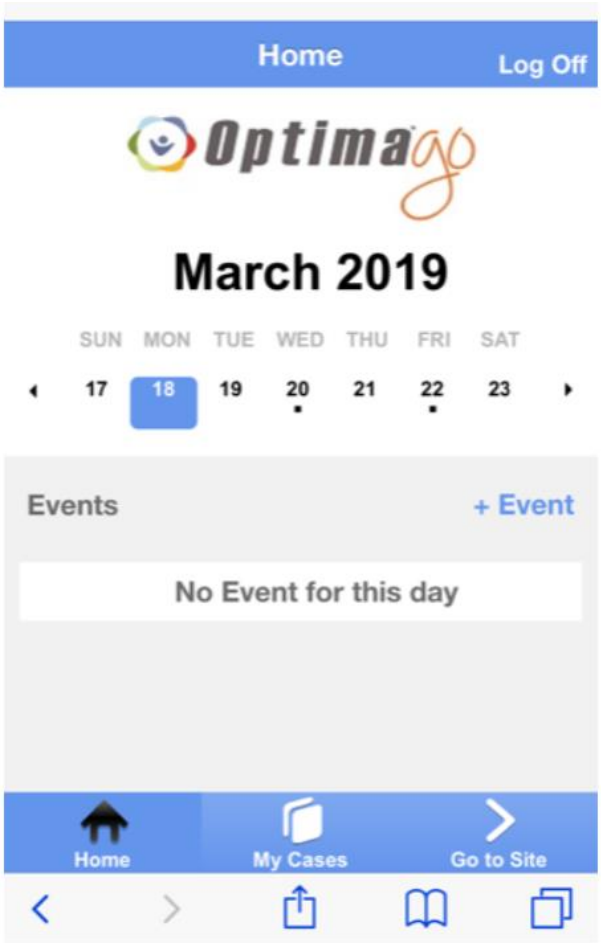
To go to the full Optima website, touch **Go to Desktop Site.**

Optima GO opens with the current week's calendar of events. This could include hearings or other events that have been added to the calendar. The dots underneath the days indicate an event. Touch the number and the event will display.

Below is an example of an expanded calendar event.







To proceed to the list of assigned cases, click **My Cases.**

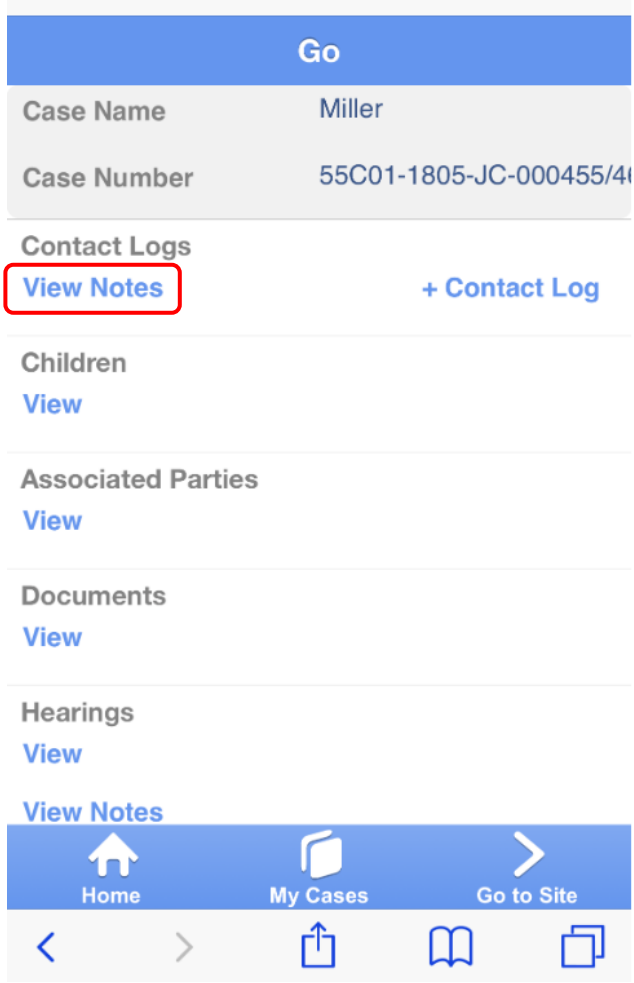
This screen will display the list of cases. To open a case, touch the case number.

Optima GO – Main Screen

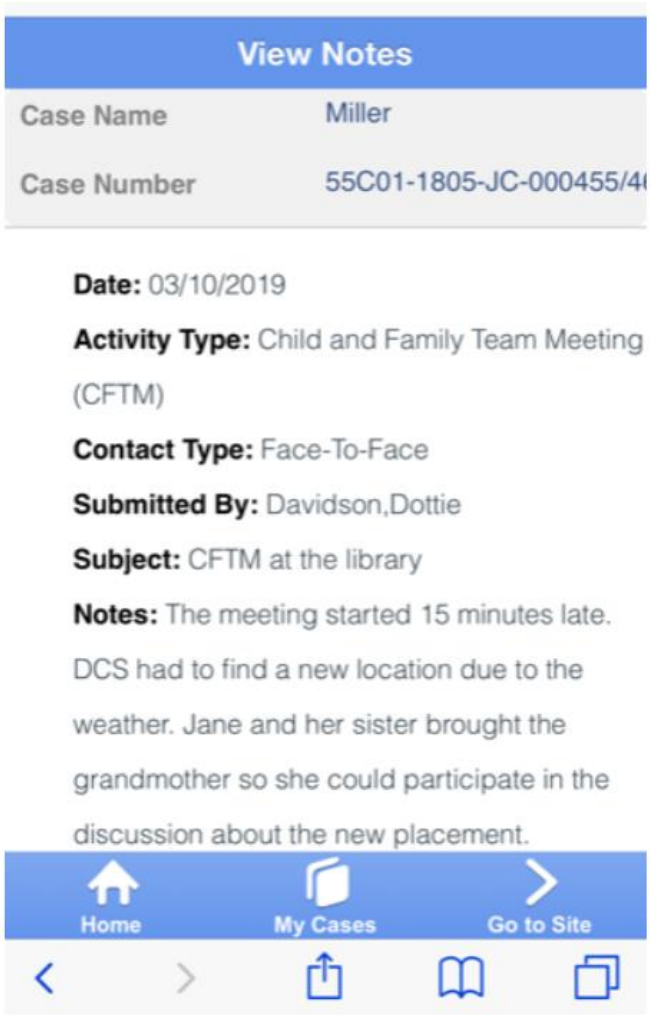
This is an example of the **Main Screen** for a case. →

Any word or words that are highlighted in **bright blue** are active links to more information about the case.

For example, touch "View Notes" – and the screen will show approved contact log notes for the case.



Optima GO - View Notes



←This display lists all of the components of this particular contact log.

To view additional lines of the "Notes" box, touch the body of the text and swipe up.

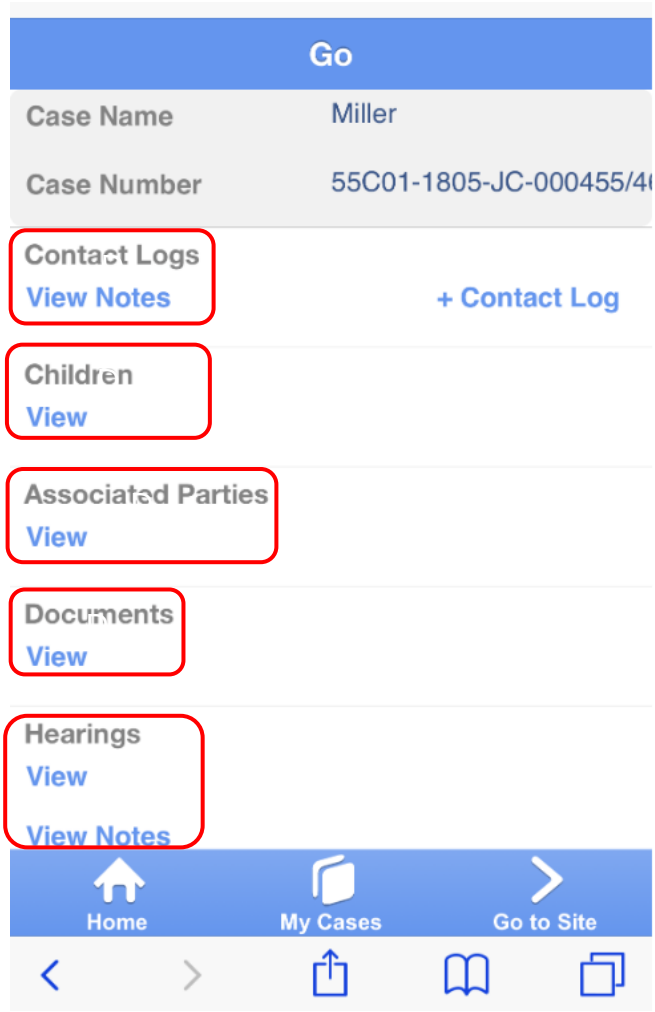
Optima GO – View Children

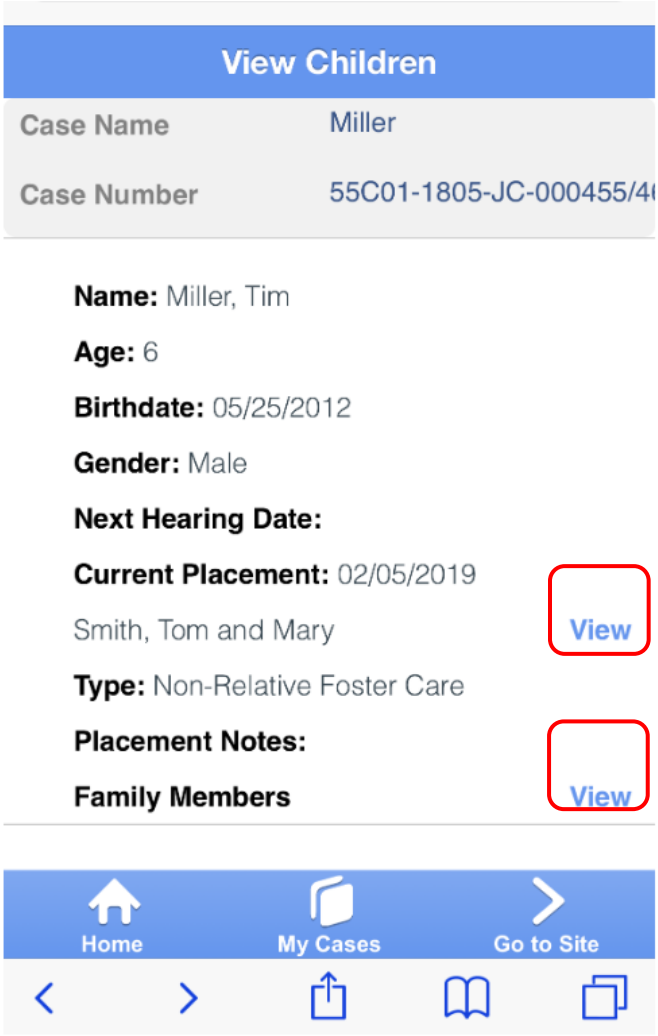
To view details of the various components, such as Children, Associated Parties, Documents, and Hearings and Notes, touch the word View under the heading.-->

Optima GO – View Associated Parties

Optima GO – View Documents

Optima GO - View Hearings and Notes

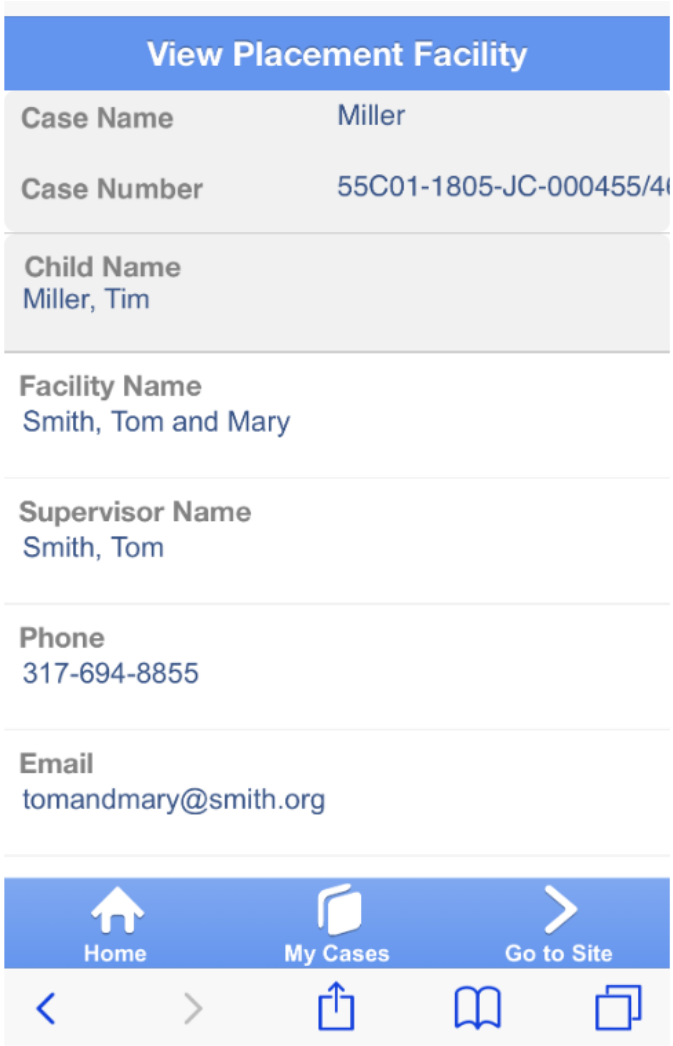


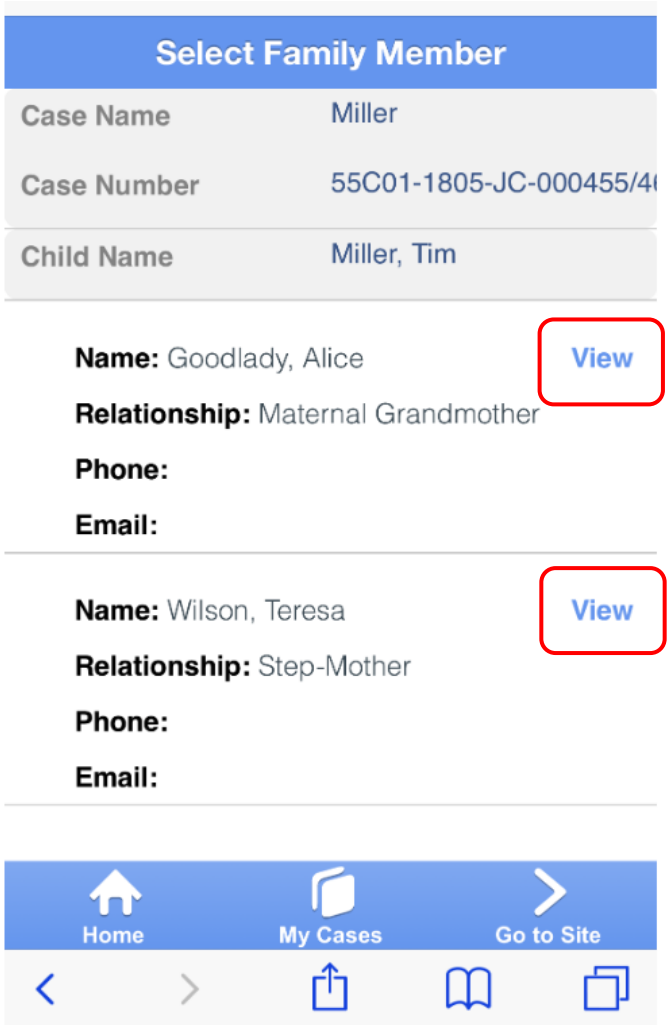


←In the **View Children** window, information regarding the children's **placement** and **family members** can be displayed by touching View.

Optima GO – View Placement Facility
Optima GO – View Family Members

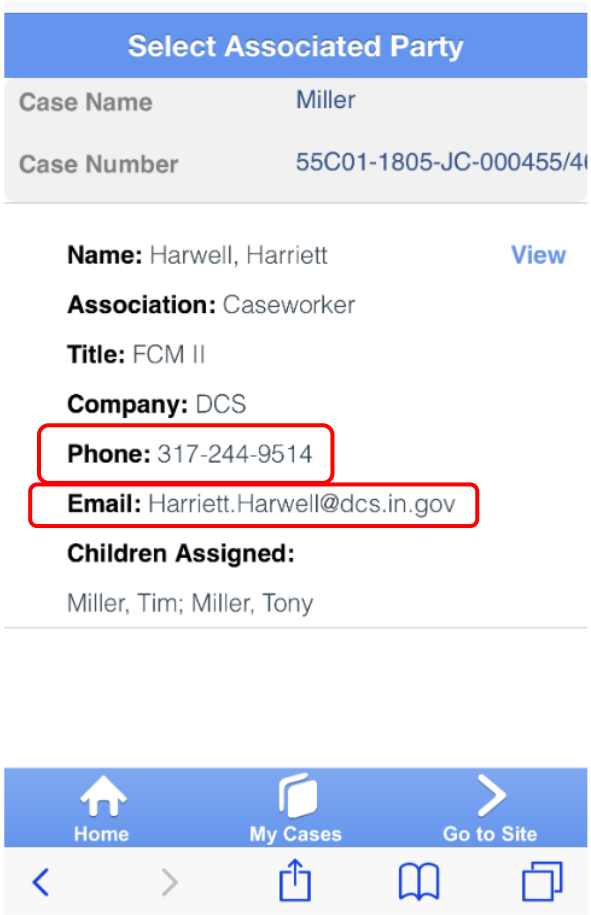
The View Placement Facility screen shows the details of the placement location.-->

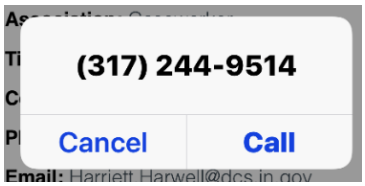




←The Family Member screen shows basic information of a family member – clicking on View will expand the screen for more details.

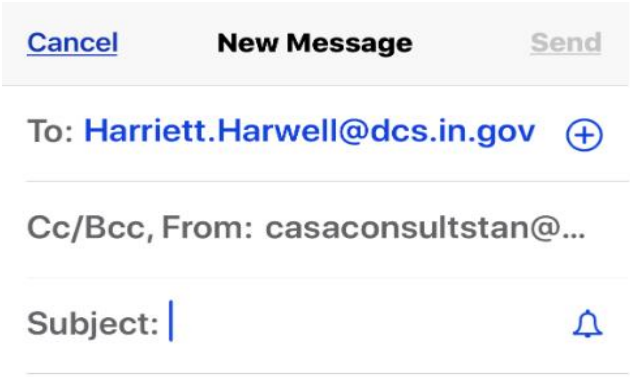
Optima GO – Associated Party Details





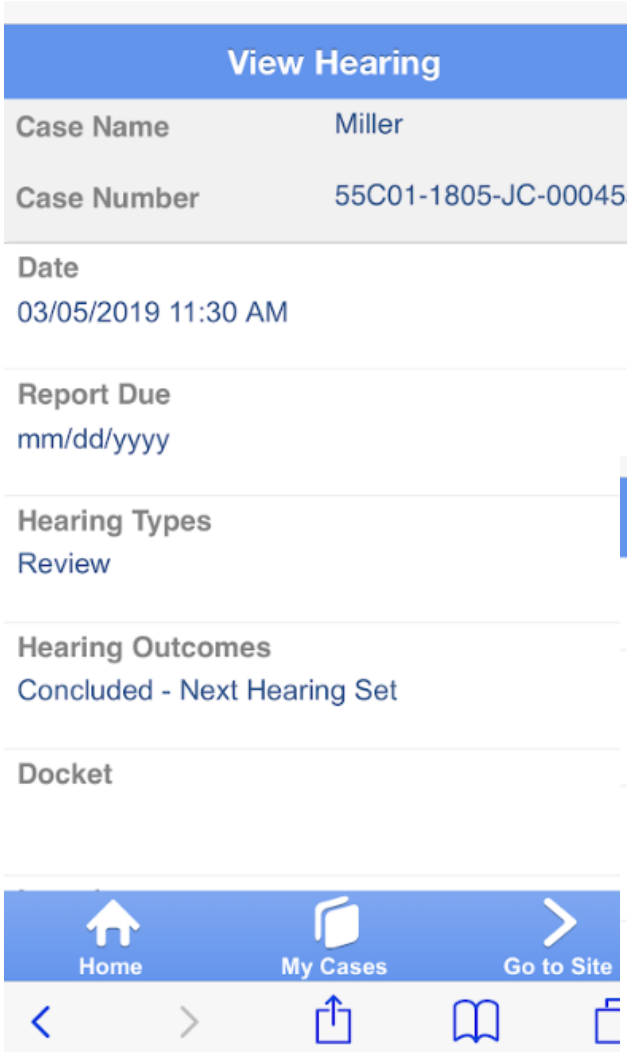
←Touching the phone number will initiate a phone call to the number shown.

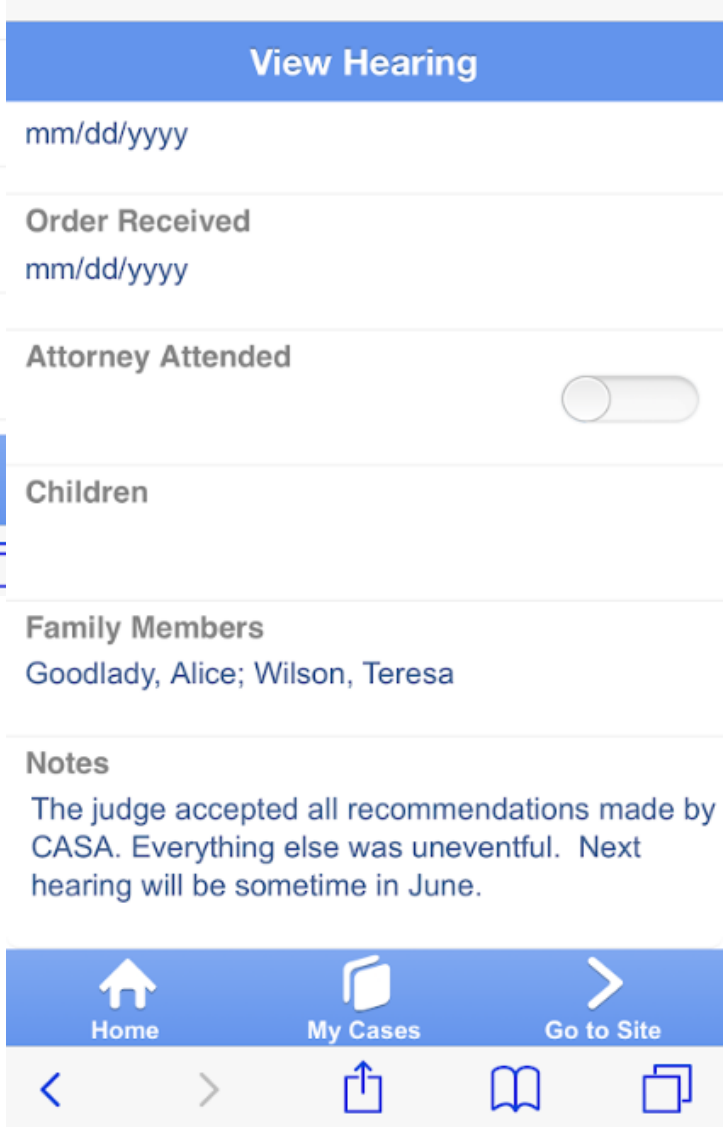
←Touching the email address will initiate an email to the person.



Optima GO – Hearing Details

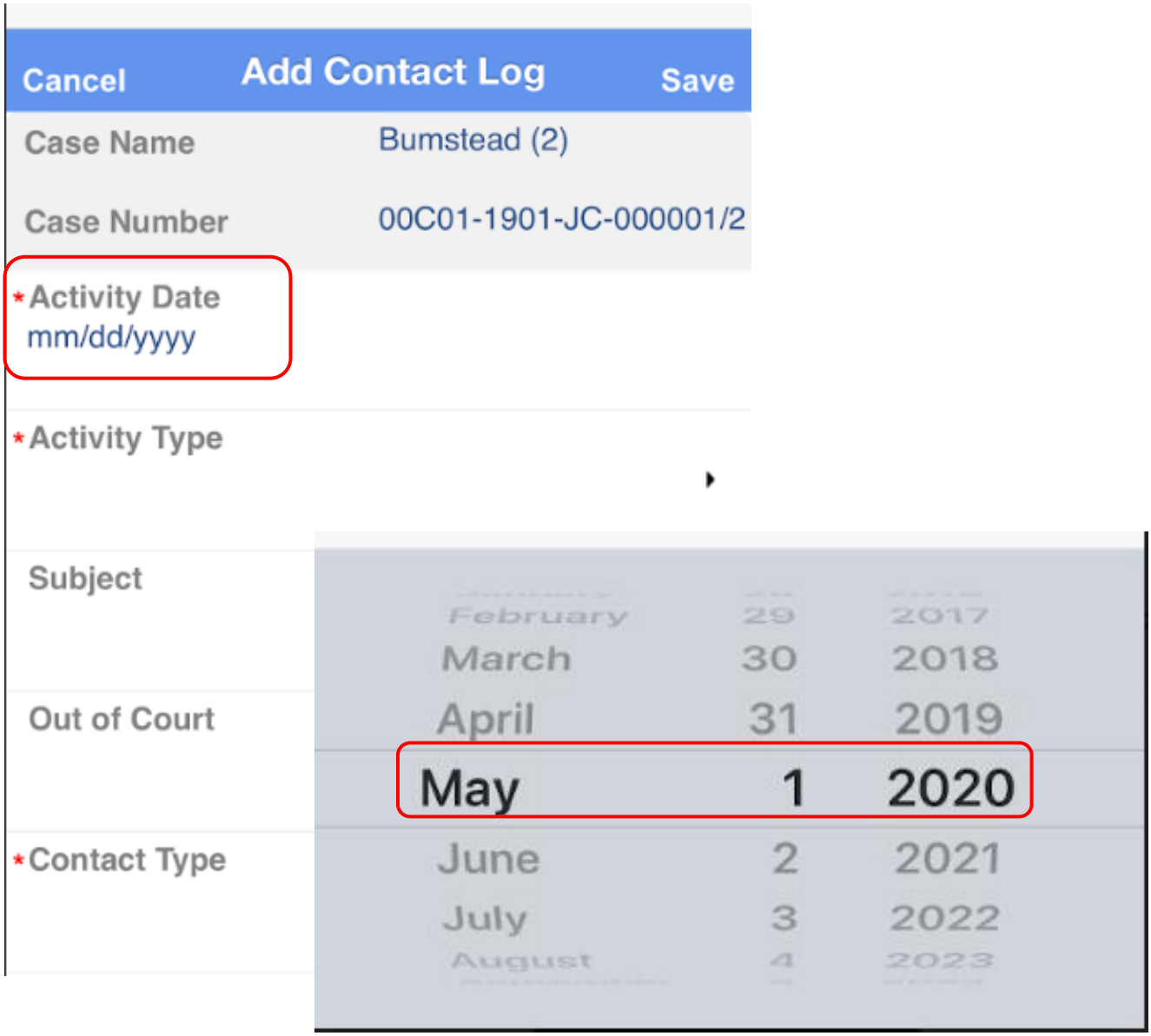
Below are examples of the Hearing Details screen views.



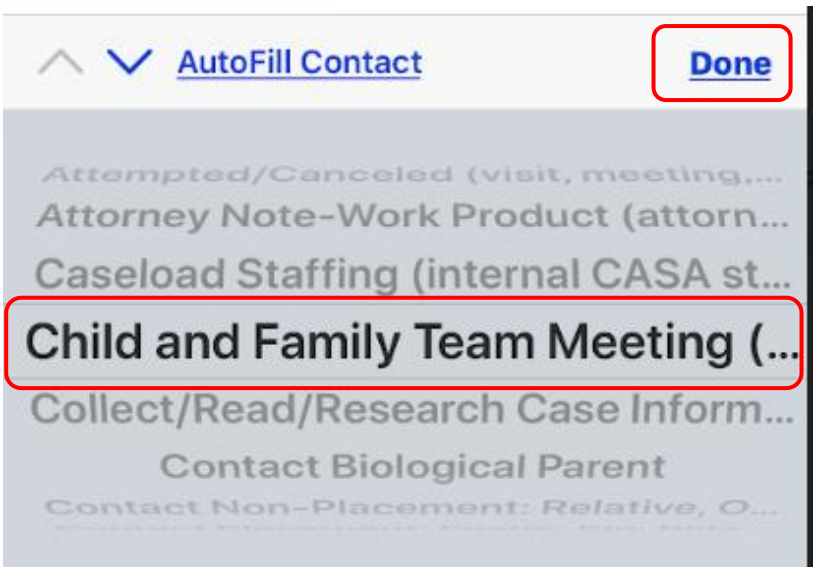


Optima GO – Contact Log – Adding

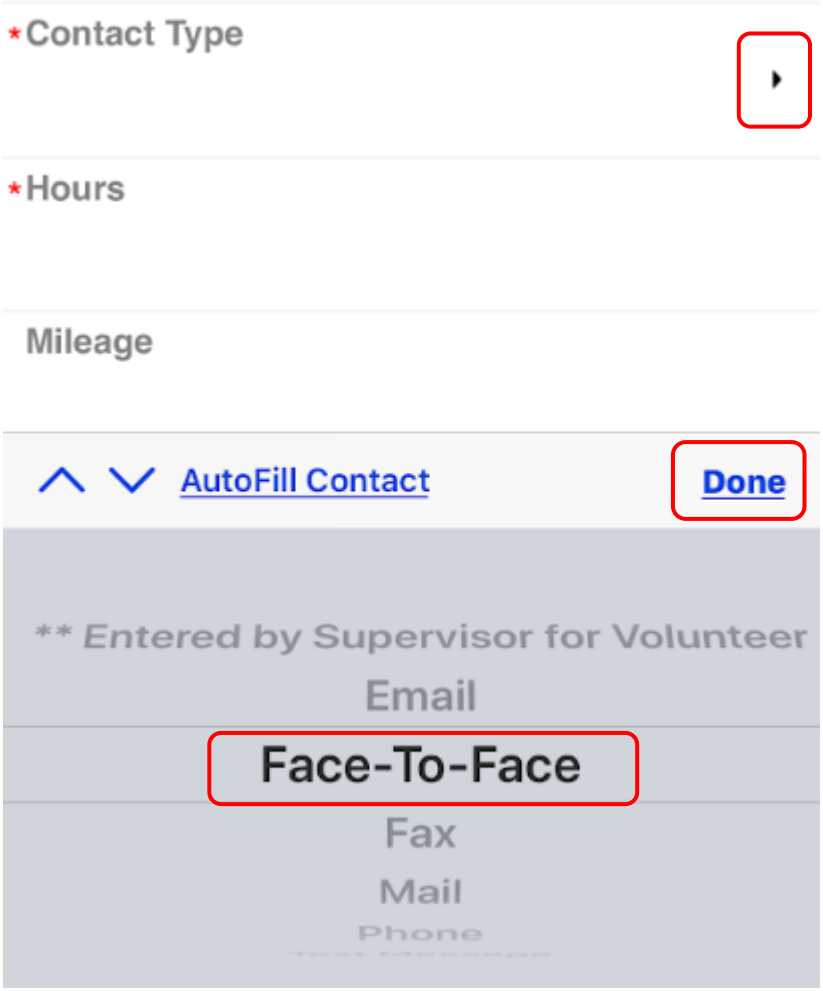
The first item to enter is the Activity Date – this is the date the event occurred. Touch the Activity Date and a pop-up selection appears at the bottom of the screen. Dates that are entered through Optima GO appear as a wheel – use a finger to swipe up or down to change the month, day or year. The red asterisk * indicates a required field.



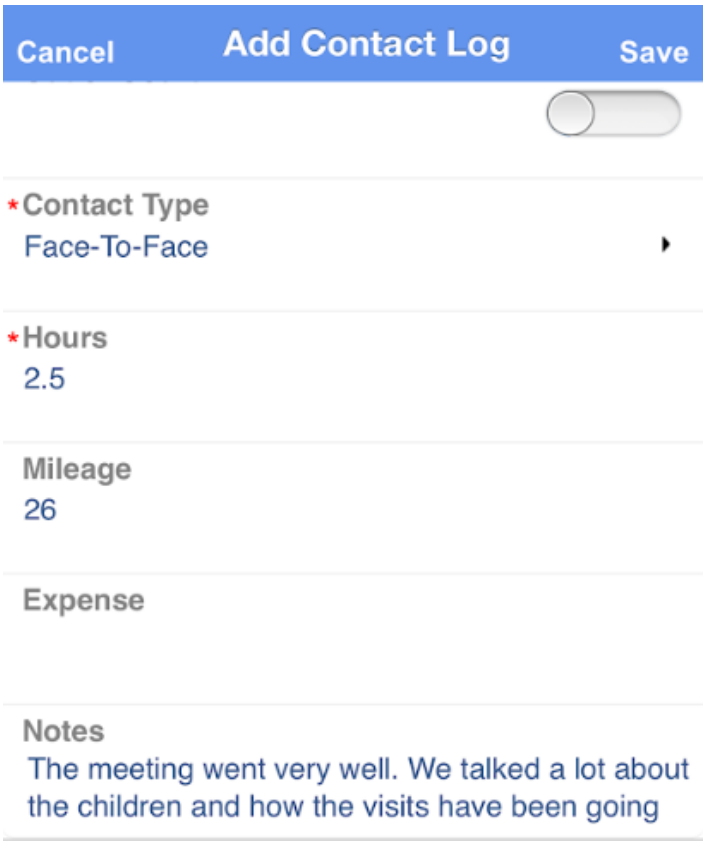
Enter the Activity Type by touching the triangle to the right of the Activity Type text as shown. A selection wheel will appear at the bottom of the screen. When the correct activity is selected, touch Done.



Enter the Contact Type by touching the triangle to the right of the Contact Type text as shown. A selection wheel will appear at the bottom of the screen. When the correct type is selected, touch Done.

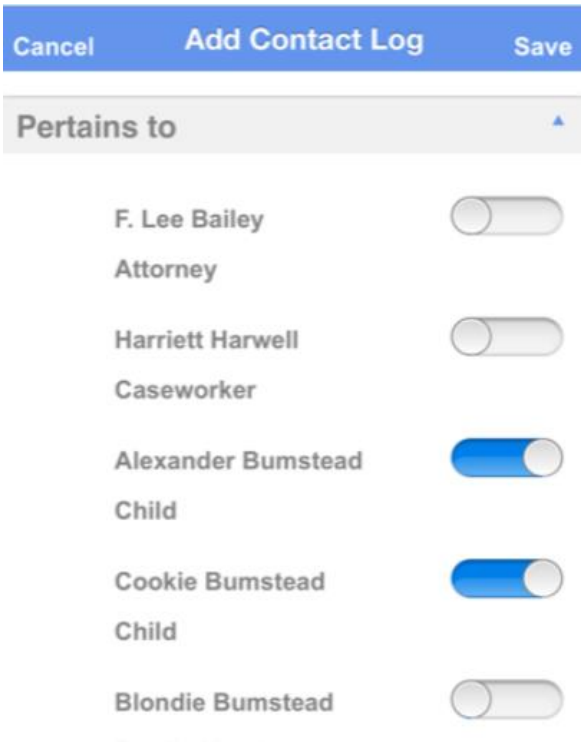


Enter the number of hours, mileage and/or expenses as shown. Note – hours are entered in decimals with .25 as the minimum amount.

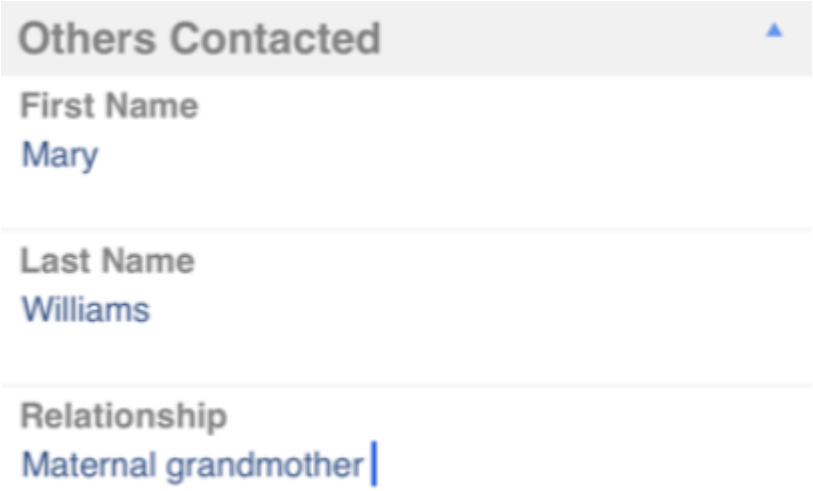


The Notes section is where the log notes of the event are entered. A sample is shown to the left. ←

Select the person(s) the contact log pertains to by sliding the selection button to the right – the selection button will change to a bright blue to show it has been selected. →



If others were contacted, enter their name(s) as shown below



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