Optima™

# Training

https://tx-bigcountry.evintosolutions.com/

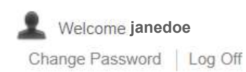
Login with your provided credentials

**Username: firstnamelastname**

**Password: 123456**

The first time you login…

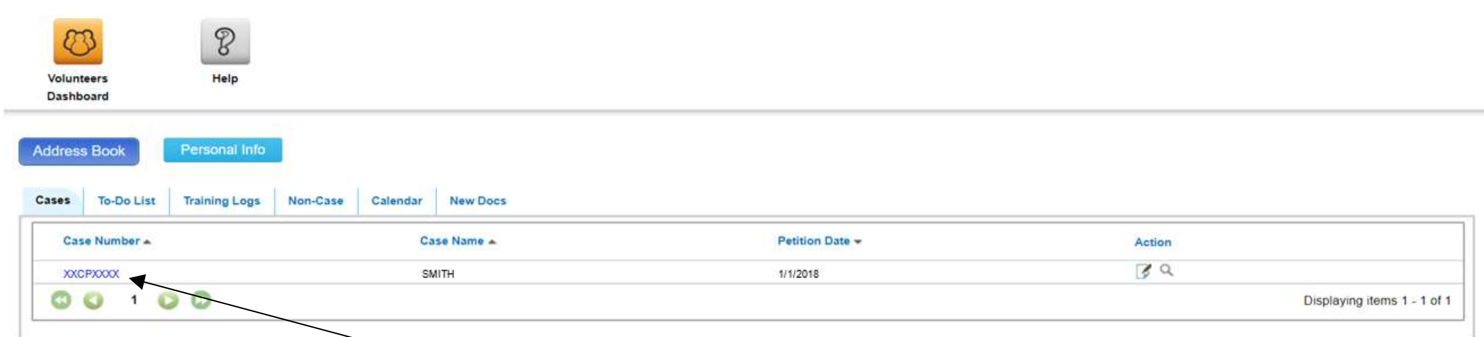
1. Change your password. Click "Change password" beneath your name in the upper right corner of the screen and choose a new password.




2. Update personal information by clicking "Personal Info"
    a. Verify that all information is correct
    b. Emergency contact – if none is listed, click the green "Add" button and input contact information for at least 1 person to contact in case of emergency


3. Return to the home screen by clicking "Volunteers Dashboard"

**<u>Volunteers Dashboard</u>**




**Cases Tab** – View all active case assignments

Select a case to view by clicking the <u>blue case number</u>. This will open the Case Details page. This page displays information about the case including case assignments, children in case, current placements, and family members sections. It also is where contact logs, documents, and other information about the case is stored.

<u>Case Details Sections</u>


➢ **Case Information** – View case information, case assignments, children in case, current placements and family members sections. Your supervisor has already added all information known upon our appointment to the case.

**Case Assignments**

| Name | Type | Supervisor | Assigned | Released | Reason | Contact Info |
|---|---|---|---|---|---|---|
| Jones, John | | ☑ | 1/1/2018 | | | 555-555-5555 john@casagalveston.org |
| Doe, Jane | | ☐ | 1/12/2018 | | | 555-555-5555 |

1 Displaying items 1 - 2 of 2

- **Case Assignments** – You will already be listed on the case assignment section
  - Note the assigned date – this will be required information on a court report

**OPTIMA TIP:** Click this icon under the "Action" section to view more information

**Children in Case**

| Name | AKA/Alias | Gender | Child Age | Close Date | Volunteer | Supervisor | Next Hearing | Action |
|---|---|---|---|---|---|---|---|---|
| Smith, Mary | | Female | 5 | | Doe, Jane | Jones, John | 2/10/2018 | |

1 Displaying items 1 - 1 of 1

- **Children in Case** – This section contains information about the child/children in the case
  - Click on the magnifying glass to view or add more information about the child, including language, disability, and schools attended
  - If information not listed that you would like to add, click the "add" button in the appropriate category.

**Current Placements**

Add

| Name | Placement | From | Reason | With Siblings | Contact Name | Contact Info | Action |
|---|---|---|---|---|---|---|---|
| Smith, Mary | Foster Home - Non-Relative | 1/1/2018 | Abuse/Neglect | None | Parent, Foster | 555-555-5555 | |

1 Displaying items 1 - 1 of 1

- **Current Placements** – This section contains information about the child/children's current placement(s) and the date placed
  - Click the magnifying glass to view more information about the placement

**Family Members**

Add

| Name | AKA | Relationship | Active | Deceased | Contact Info | Action |
|---|---|---|---|---|---|---|
| Brown, Ashley | | Mother | ☐ | ☐ | 555-555-5555 ashleybrown@gmail.com | |
| Smith, Mark | | Father | ☐ | ☐ | | |

1 Displaying items 1 - 2 of 2

- **Family Members** – View all known family members and their contact information.
  - Add family members by clicking the "Add" button


- **Contact Logs** – Contact logs are a record of each contact you make regarding the case
    - Include this information:
        - Person contacted
            - If they are already listed as an "Associated Party" (see below) you will be able to check the box next to their name as well
            - If they are not, add their information in the field titled "Others Contacted"
        - Date contacted (activity date)
        - Subject – description of the contact (ex: Monthly Visit)
        - Activity type
        - Contact type – phone, email, face-to-face, etc.
        - Hours – record time spent travelling and during the contact in decimals (30 minutes = .5 hours)
        - Mileage, if applicable – if the visit was 5 miles away from your home, you would record 10 miles (5 miles to the visit, 5 miles back home)
        - Notes – be thorough and describe the contact. If it was an email, you can copy the content of the email into this field. Notes will be extremely helpful when composing a court report, and the more detail included the better!
    - Supervisors also record all contacts made for the case in this section
    - *Use the Optima Contact Log Table for further information about recording contacts*

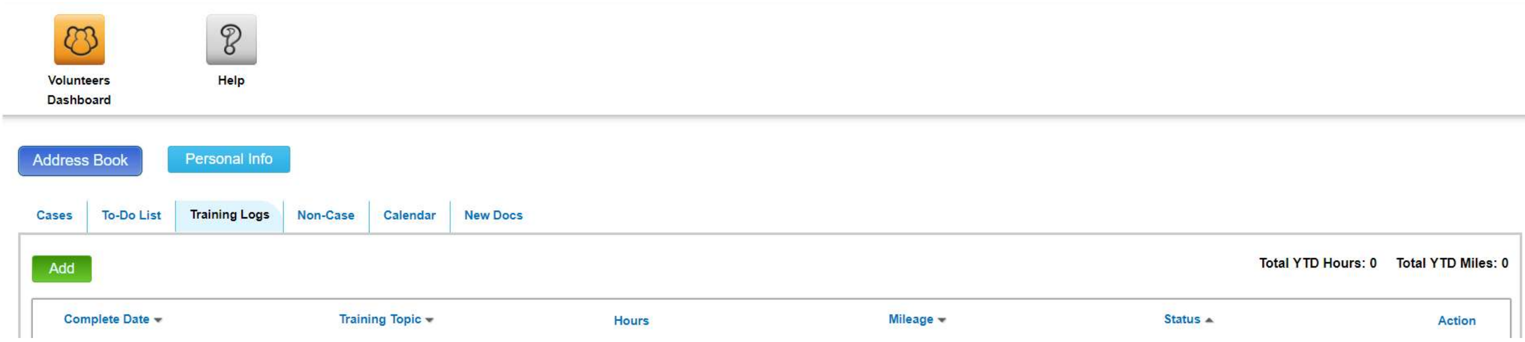
- **Associated Parties** – This section lists all individuals that have been identified as "associated" with this case
    - They are the individuals listed on the person contacted box of the contact log
        - If you are consistently contacting someone and adding their information as "Others Contacted," it is helpful to add them as an "Associated Party" – ask your supervisor for more information
        - View this section to find contact information for attorneys, caseworkers, and placement

- **Documents** – All documents related to the case are uploaded to the documents tab
    - As soon as you are assigned you should be reading all documents, beginning with the oldest document (last page of documents) so that you see the oldest/first documents before the newer ones – click the magnifying glass to begin downloading the file
    - Any documents you receive should be uploaded by you or your supervisor to this area (ex: IEPs, educational records, psychological evaluations, medical records, etc.). All documents should be destroyed after uploading.
        - Click "Add" to upload the file
            - Select the file type – ask your supervisor if you are unsure what type to select
            - Select the date of the document
            - Click "Save"

- **Hearings** – View list of all hearings for the case, along with when the report for that hearing is due and the type of hearing. *Court reports are always due 15 business days before the hearing*

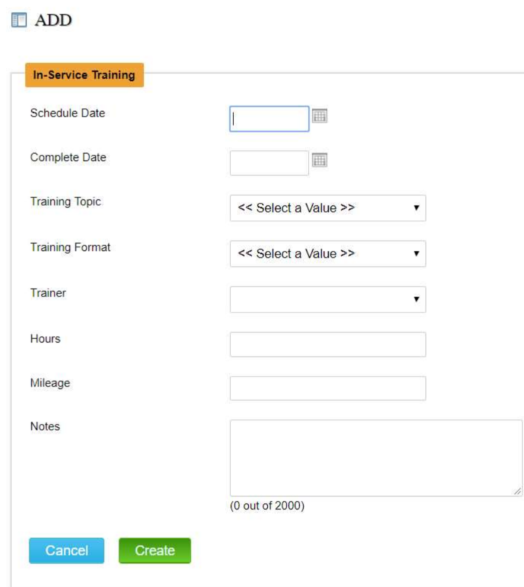
- **Placement History** – View the child's placement history, including placement type, date placed, date removed, and contact for the placement. This is included in the court report, and very helpful for composing a court report

## Volunteers Dashboard



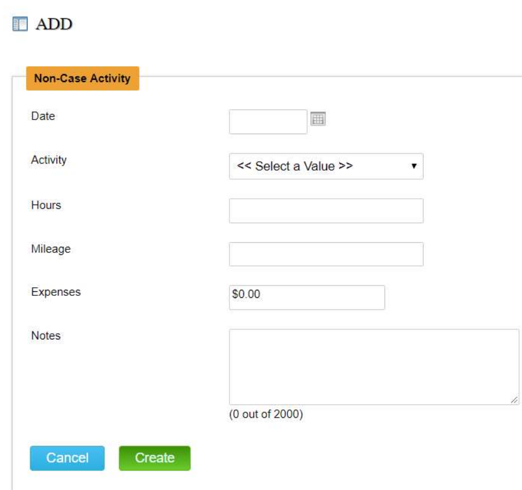

**Training Logs Tab** – View all in-service training hours accrued – you must have 12 hours each calendar year!

- Click "Add" to create an entry for each training attended
- Include this information:
  - Date training occurred (both schedule and complete date)
  - Training topic – select the option that most closely fits the topic of your training
    - Ex: If you read a book, select book and record 1 hour for every 100 pages read (350 pages=3.5 hours)
  - Hours – record the number of hours spent in training
  - Mileage – record the number of miles travelled to attend training
  - Notes – if you are reading a book, include responses to questions provided with the book in this area
- Click "Create" to save




**Non-Case Tab** – Record all non-case activity in this area (fundraising, office help, recruiting, speaking engagements, CASA events)

- Click "Add" to create an entry for each non-case activity attended
- Include this information:
  - Date activity occurred
  - Activity
  - Hours – record the number of hours spent on non-case activity
  - Mileage – record the number of miles travelled to attend non-case event
- Click "Create" to save

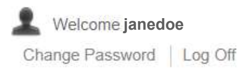



**New Docs Tab** – If a new document has been uploaded to Optima and you have not viewed it, it will be visible in this section until you view the document

- All documents listed under "New Docs" will also be visible on the "Documents" tab for the specific case

- This is a useful way to make sure no documents are missed as they are uploaded

**<u>Tasks for new Optima Users:</u>**




- ☐ Login and change your password from 123456
    - ∗ **Note: if you get locked out and cannot log in, do not click the "help" button. Contact your supervisor to have your password reset.**
- ☐ Add an emergency contact if one is not listed
- ☐ Update personal information
    - ∗ Add your "CASA email" if it is not already listed
    - ∗ If you have not created a dedicated email address, consider doing so. This is a good way to separate personal and CASA emails, and allows privacy of not giving out a personal email address
        - ▪ Gmail.com and Yahoo.com are good email server options
        - ▪ Advocates often use email addresses such as:
            - janedoe.casa@gmail.com
            - jdoe_casa@gmail.com
            - jd.casa@gmail.com
        - ▪ Be creative, but keep in mind that a shorter email address will be easier to remember
- ☐ Explore the database and get comfortable with where information is located
    - ∗ Review the Optima Contact Log Table for details about recording contacts
- ☐ View your assigned case
    - ∗ Read all documents (beginning with the oldest document and finishing with the most recent)
    - ∗ Review all associated parties
- ☐ Record time reviewing case in Contact Log as "Case research"

**Questions? Contact your supervisor for help with Optima**