

Optima

User Guide

Keep this

handy for

future reference!!



CASA of Terrebonne

Adopted January 1, 2015

Revised August 21, 2015

Revised March 30, 2016

The mission of the Court Appointed Special Advocate Association of Terrebonne is to be an independent and objective presence in the courts to speak for the best interest of abused and neglected children of Terrebonne Parish. We promote and support trained community volunteers to represent our children and help secure for each child a nurturing, safe, and permanent home.

ONE voice - ONE volunteer - ONE child at a time

Log On

Website: **la-terrebonne.evintosolutions.com**

Username: firstname.lastname

Password: _____

Initial password 123456 you MUST change it

Change/Reset Password

- Click change password icon



Welcome

firstname.lastname

[Change Password](#) | [Log Off](#)

Complete all necessary fields

****Please note-passwords are case sensitive and must be at least 6 characters in length****

- If forgotten/lost password click [Reset my password](#)
Complete all necessary fields (username and email address that CASA has on file)
New password will be sent to your email
Or contact the OPTIMA administrator.

Update My Personal Information

- Click Personal Info Icon [Personal Info](#)
- Click **Edit** Icon [Edit](#) to update personal information
Update all necessary fields and click **Save** icon

PLEASE KEEP YOUR INFORMATION CURRENT!!

Add / Edit Associated Parties

To Add an Associated Party click **Add** icon

- Select Party Type
- If listed in drop down menu click **Save** icon and skip next step (go to add child/family)
- If not listed in drop down menu click **New** icon and complete all necessary fields, click **Create** icon
 - Now you must add the party to the case
Select Party Type
Select listing in drop down menu and click **Save** icon
- Add child or family member being served
Click **Add Child** or **Add Family** icon
Select members, date, and **Save**

Help

- Internal help within Optima system **coming soon**
- No internet access / no electronic device-Visit the public library or CASA office
- Forgot password- see page 2 or contact OPTIMA administrator
- Boxes turn red when trying to create/save
Any Red box means that the field cannot be left blank or something is entered wrong!


****If you can not log on to OPTIMA****

- Make sure that you are putting the address in an address bar and NOT a search bar (i.e google/bing)
- If you are using a smartphone, type the address completely out, DO NOT click on the shortcut that appears when you begin typing (That is a form of web search)
- DO NOT begin with "www."
- If you follow these things and still cannot log on, clear browser history and try again. If unsuccessful contact the CASA office.

Updating Other Case Information

(You will receive new information first hand relating to the case and you should continue to build your case in Optima)

Click the magnifying icon  to open up more details throughout optima


Click  icon and update information
Click **Save** icon

Examples of areas to update/add information:

Child Information
School, Disabilities, Placement Phone Number/
Address Change
Parents Information
Change of Address/Phone Number/ Employ-
ment, Disabilities, Concerns

Non-Case


(Track activities and time spent volunteering with CASA but not related to a case)

Click Non-Case icon 
Select Add icon and complete necessary fields (date, activity, hours, mileage, and notes)
Example activities: advocate panel, appreciation event, donation drives, open house, recruiting events, etc...

To-Do List

(Supervisor can create tasks with deadlines for you to complete—Coming soon!!)

Click To-Do List icon 

To view/edit task select pen/paper icon  in action
Complete necessary fields (date task completed, status, status reason, and notes)

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Address Book

(Great place to store contact information for resources, cannot be edited or deleted by anyone other than yourself)

Click Address Book icon



Click **Create New** Icon

Complete all desired fields and click **Create** icon


Calendar

(Great organization tool; again specific to you with the availability for your supervisor to add events)

Click Calendar icon




Can view **Day/Week/Month** by selecting desired icon

Use arrow icons  to navigate from day to day, week to week, or month to month

To Create a New Event

Double Click on desired date

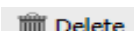
Complete all desired fields (Event Description, Time Period, Notes, if you have multiple cases you can select a case number)

Click  icon

To Cancel click  icon

To Delete an Event

Double click on date of event

Click  icon

“Less time doing paperwork = more time to advocate.”

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Training Logs

(View this anytime to keep track of your continuing education credits; 12 hours per calendar year)

- Click Training Logs [Training Logs](#) icon
- Select **Create New** icon and Complete necessary fields (scheduled date, format, mileage, see explanations for other fields below)
 - ⇒ **Training Topic:** If not instructed by staff please use your best judgment
 - ⇒ **Hours/credits:**
 - Books/journals: One Hour per 100 pages
 - Movies related to training topics given in Optima: 90 minute movie = 1.5 hrs.
 - CASA Continuing Ed classes based on length on event
 - Seminars/workshops based on length of event
 - Newsletter=.5 monthly

Notes: Provide a concise summary to address questions listed:

- Basic Details of the event or material: who, what, where, when, why?
- What did you learn from this experience?
- How will this experience improve your abilities as a CASA Volunteer?
- Do you have any suggestions that would make the CE experience more beneficial?
- Would you recommend this CE event/ experience for other CASAs?

- YOU ARE RESPONSIBLE FOR PUTTING IN YOUR NEWSLETTER IN-SERVICE CREDIT .50 MONTHLY!!!

Check your monthly newsletter for upcoming in-service!!!

8. Contact with Foster Parents
Select anytime you speak to the foster parent
9. Contact with Volunteer Advocate-Non-Supervision (Supervisors only)
10. Contact with Volunteer Advocate—Supervision (Supervisors only)
11. Court Report Preparation
Select to capture time spent completing court report
12. Court Report Submitted
Select to capture time spent submitting court report
13. Meeting
Select when you attend any meeting regarding CASA child(ren) (IEP, FTM, wraparound, counseling etc)
14. Mentor/Mentoree Contacted
Does not apply—DO NOT USE
15. Searched for Resources/Services
Select when doing any research or searches for services for anyone involved in your case
16. Staff to Staff Contact (ONLY to be used by Supervisors)
Use whenever you inform another supervisor of some thing you covered for them.
16. Travel
Select to capture anytime you spend traveling. Calculate Time and mileage as round trip

contact your supervisor!!

When to use each Activity type

1. Attempted Contact

We must keep track of all attempted contacts so that our records reflect attempts to obtain 1st hand information

2. Attended Hearing

Select when attending a hearing regarding your case

3. Biological Family Members Contacted

Select when you contact any family member

4. Case Progress Summary/Data Entry

*No child monthly visit—Any time a child is not seen in a given month please complete a contact log to record the reason why the child was not seen.

*“Other Time” – Time spent on the case that cannot be captured anywhere else.

*Time spent entering information

5. Child Contacted

Select when the child is contacted no matter which type of contact

6. Contact with associated party

Select anytime someone related to the case is contacted this includes DCFS case workers, attorneys, Service Providers, school/teachers

7. Contact with Advocate Supervisor

Select when the advocate contacts a supervisor or lead advocate supervisor

Case Details

(This takes the place of all case documents/files)

Click



magnifying glass icon and all case details will appear

- Case information (basic case details)
- Legal Status (child/will be blank)
- CASA Assignments (will display CASA staff and Advocates assigned)
- Children in Case
- Current Placements
- Family Members (all parents/caregivers even if deceased, if multiple fathers on case AKA section will display what child/how father is connected)
- Contact Logs (takes the place of paper contact forms)
- Associated Parties (all parties involved other than CASA and family members example: Attorneys, caseworkers, foster parents, etc...)
- Documents (all scanned documents relating to case such as court petitions, FTM packets, CASA court reports, etc...)

Click






magnifying glass icon to view document

Click **Open** icon and the document will open with Adobe Reader



If in doubt,

- To turn document click **View** icon, select **Rotate View** icon, and click **Clockwise** icon
- To zoom in click 
- To zoom out click 
- To close document click 
- Petitions and Allegations (date child/ children were placed in foster care)
- Hearings (dates for upcoming court hearings / will display date CASA court report is due)
- Placement History (placement information on all children since being placed in foster care)

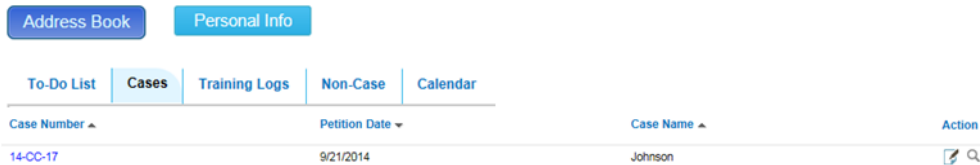
Contact Logs

(This takes the place of monthly activity forms. All contacts to be entered within 72 hours of contact)

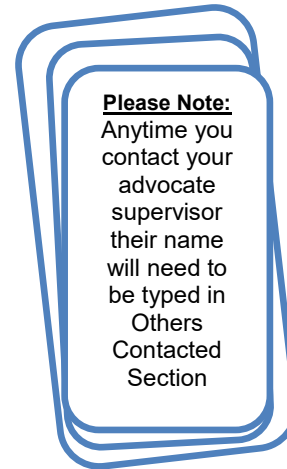
If in Case details Click **Contact Logs** tab and click **Add** icon



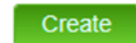
If on Volunteer Dashboard home page click pen/paper icon in Action



- Complete all necessary fields
 - Date Activity **Occurred**
 - Activity Type
 - Subject (optional)
 - Out of Court
 - Contact Type
 - Hours (not minutes) **.25**=15 min., **.50**= 30 min., **.75**= 45 min., **1** hr., **1.25**= 1 hr. 15 min., etc...
 - Mileage (roundtrip)
 - Notes (summary details of activity)
 - Select all parties present (if not listed then type in necessary fields under **Others Contacted**)



Click



****Remember to answer the following questions in the notes section...WHO did you contact, WHAT was the purpose or topic, WHAT was your observation, WHEN did the contact take place, WHERE did the contact take place or what type of communication, HOW does this information effect the child, HOW do you plan to advocate accordingly. ****

- Once Contact Log has been submitted the status will be **pending** and upon the supervisor's review the status will change to **denied** or **approved**
 - **Denied Status:** Please open and review log for coordinator's suggestions (suggestions will be found in the **Notes** field). Once corrections have been made click **Save** icon
 - **Approved Status:** Contact has been approved and you can no longer edit the log- please contact supervisor if corrections need to be made