

# OPTIMA GUIDE

## A few things to note:

1. Optima is “In the Cloud”, that means, you log onto a website, i.e. Facebook and it is not a program you load on your computer.
2. The easiest way to find the Optima website is to go on the CASA of the Pines page (www.casapines.org.) you will find the optima link under the Volunteer tab.
3. You CAN NOT break it. You can click on anything and look at it and it will not mess it up.
4. If you want to see something on any section on any screen, click on the magnifying glass.
5. If you need help, please contact us. We will be glad to schedule one on one training with you. Anyone in the office will be glad to sit down with you and help.

## How to add notes to your case:

1. On your volunteer dashboard/main screen, click on your case, which is the number under the words “ **Case Number** ”.

The screenshot shows the Optima website interface. At the top, there is a navigation bar with the Optima logo and a user profile icon for 'V Chan'. Below this is a secondary navigation bar with icons for 'Volunteers Dashboard' and 'Help'. The main content area features a horizontal menu with tabs: 'Address Book', 'Personal Info', 'Cases', 'To-Do List', 'Training Logs', 'Non-Case', 'Calendar', and 'New Docs'. The 'Cases' tab is highlighted with a red circle. Below the menu is a table with columns for 'Case Number', 'Case Name', and 'Petition Date'. The first row of the table shows a case number 'CV-07-100-01', a redacted case name, and a petition date of '4/8/2019'. Below the table, there are navigation arrows and the number '1'. On the right side of the table, there is an 'Action' column with a magnifying glass icon, which is circled in red. A black arrow points from the text 'click on your case, which is the number under the words “ Case Number ”' to the 'Cases' tab.

**2. On the next screen go down to the bottom of the page for the most important section: “Contact Logs”.**

**This is where you will put all of your information and work in.**

**3. When you want to add your work on the case click the green “Add” button.**

Williams, Jeremy Alleged Father

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**Contact Logs** To Do Assigned Parties Documents Petitions and Allegations Hearings Placement History

**Add** View Notes Search

Name	Type	Subject	Date	Hours	Status	Action
Smith, Yvonne	CPS Contact	Possible relative placement for the	5/9/2019	0.25	Pending	Q
Huerta, Lora	Case Supervision	Reviewed notes and emails	5/8/2019	1.5	Approved	Q
Smith, Pamela	Case Research	Talked to CASA staff about case	5/8/2019	0.15	Approved	Q
Smith, Yvonne	CPS Contact	Clothes, shoes and beds for children	5/6/2019	0.25	Approved	Q
Smith, Yvonne	Parent Contact	Home visit and child visit	5/6/2019	0.25	Approved	Q
Smith, Pamela	Child Contact	Home Visit	5/6/2019	0.5	Approved	Q
Smith, Pamela	Foster Parent/Placement contact	Clothing Needs	5/6/2019	0.5	Approved	Q
Smith, Pamela	Foster Parent/Placement contact	Clothing Needs	5/6/2019	0.5	Approved	Q
Smith, Pamela	CPS Contact	Child Visit Update	5/6/2019	0.25	Approved	Q
Smith, Pamela	Child Contact	Child visit	5/5/2019	1	Approved	Q
Smith, Pamela	Child Contact	Home Visit	5/5/2019	1.5	Approved	Q
Smith, Pamela	Child Contact	Home Visit	5/5/2019	1	Approved	Q
Smith, Yvonne	CPS Contact	████████ placement and follow up	5/3/2019	0.5	Approved	Q
Smith, Yvonne	Foster Parent/Placement contact	████████ visit at Buckner	5/3/2019	0.15	Approved	Q
Huerta, Lora	Case Supervision	Called hotline	5/1/2019	0.25	Approved	Q
Huerta, Lora	Foster Parent/Placement contact	Jennife ██████████	5/1/2019	0.75	Approved	Q
Smith, Yvonne	Parent Contact	Names and numbers of other family	5/1/2019	0.15	Approved	Q
Huerta, Lora	CPS Contact	Conference call with Jennifer and	5/1/2019	1	Approved	Q
Huerta, Lora	Case Supervision	Spoke with school counselor and	4/30/2019	1.5	Approved	Q
Smith, Yvonne	CPS Contact	████████'s behavior	4/30/2019	0.5	Approved	Q
Smith, Yvonne	Foster Parent/Placement contact	Introduction and Schedule of visits	4/29/2019	0.5	Approved	Q
Smith, Pamela	Staffing/Team Meeting	FGC	4/26/2019	2.5	Approved	Q
Smith, Yvonne	Staffing/Team Meeting	FGC	4/26/2019	2.5	Approved	Q
Smith, Yvonne	Attended Hearing/Court	Adversary Hearing	4/18/2019	1	Approved	Q
Smith, Pamela	Attended Hearing/Court	Adversary Hearing	4/18/2019	1	Approved	Q

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- 4. You will then be on a screen that asks several questions, such as what date you did the work, who you contacted, if it was a face to face, phone call etc. These are all easy questions that you will know the answer to.**
- 5. What you did on the case you put in “Notes”. You can cut and paste emails here, (take out the email address or it will do an error screen), notes after a visit, notes after a phone call, court etc.**
- 6. Make sure to add how long you spent on the activity under hours. Also add your mileage and any expenses, i.e. meals purchased, if you traveled out of your base county. Also please make sure to include the address you traveled to in your notes.**

The screenshot shows a web browser window with the URL <https://tx-pines.evintosolutions.com/VolunteerContactLog/Create/MTUzNDk5Mg%3d%3d?gotocasedetail=True>. The browser's address bar and tabs are visible. The page content includes a navigation bar with 'Volunteers Dashboard' and 'Help' icons. Below this is a section titled 'ADD' with a sub-section 'Contact Log'. The 'Contact Log' form contains the following fields:

- Case Number: CV-0015 [redacted]
- Case Name: [redacted]
- Activity Date: 5/9/2019
- Activity Type: [dropdown menu]
- Subject: [text input]
- Out of Court: [checkbox]
- Contact Type: [dropdown menu]
- Hours: [text input]
- Mileage: [text input]
- Expenses: \$0.00
- Notes: [text area, 0 out of 5000]

To the right of the form is a table with the following columns: 'Select', 'Pertains to', and 'Party Type'. The table contains 15 rows, each with a checkbox in the 'Select' column, a redacted name in the 'Pertains to' column, and a party type in the 'Party Type' column. The party types listed are Attorney, Caseworker, Child, and Family Member.

Below the table is a section titled 'Others Contacted:' with three input fields for First Name, Last Name, and Relationship.

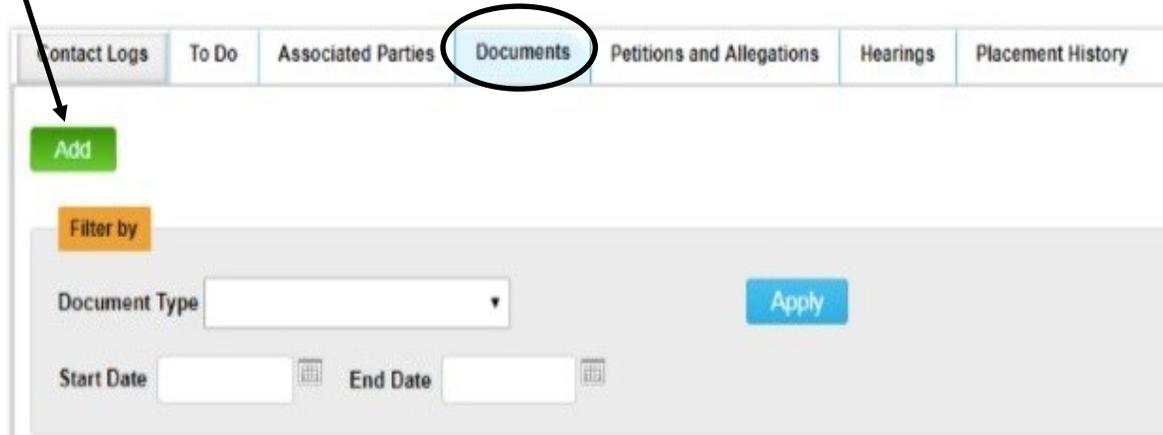
At the bottom of the form, there are two buttons: a blue 'Cancel' button and a green 'Create' button. An arrow points to the 'Create' button.

**7. When you finish adding your notes click the green “Create” button at the bottom.**



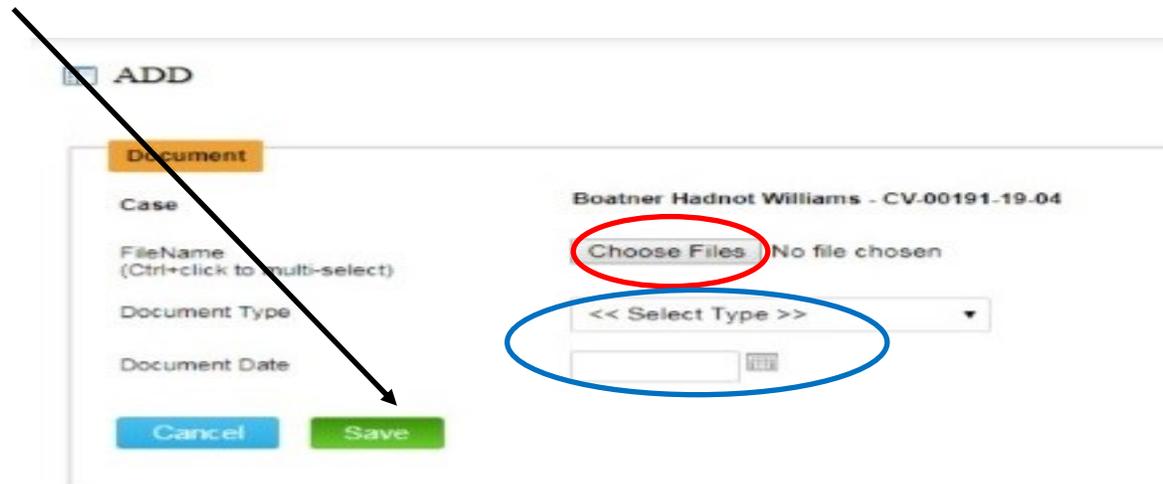
## **How to add Case Documents:**

- 1. On the main page you will also find a section called “Documents”. This section is where you will add all of the documents pertaining to your case. Your Casework Supervisor will also add any documents that they may have.**
- 2. Click on the “Documents” button.**
- 3. Click the green “Add” button at the bottom.**



The screenshot shows a navigation bar with tabs: Contact Logs, To Do, Associated Parties, Documents, Petitions and Allegations, Hearings, and Placement History. The 'Documents' tab is selected and circled in black. Below the navigation bar is a green 'Add' button with an arrow pointing to it. Underneath is a 'Filter by' section with a 'Document Type' dropdown menu, an 'Apply' button, and 'Start Date' and 'End Date' fields with calendar icons.

- 4. Click “Choose File” and then find the file on your computer.**
- 5. Click from the menu the type of document and put the date.**
- 6. Click the green “Save” button.**



The screenshot shows the 'ADD' form for a document. At the top left is a checkbox labeled 'ADD'. Below it is a 'Document' section with the following fields: 'Case' (Boatner Hadnot Williams - CV-00191-19-04), 'FileName (Ctrl+click to multi-select)', 'Document Type' (a dropdown menu with '<< Select Type >>' selected), and 'Document Date'. The 'Choose Files' button is circled in red, and the 'Document Type' dropdown and 'Document Date' field are circled in blue. At the bottom are 'Cancel' and 'Save' buttons. An arrow points from the 'Save' button in the previous step to this 'Save' button.

**7. Below are some examples of documents that might be added to a case.**

[Contact Logs](#)
[To Do](#)
[Associated Parties](#)
[Documents](#)
[Petitions and Allegations](#)
[Hearings](#)
[Placement History](#)
[Case Closing Information](#)

**Add**

**Filter by**

Document Type  **Apply**

Start Date   End Date

File Name ▲	Document Date ▼	Add Date ▲	Document Type ▲	Action
doc06792920190123093950.pdf	1/18/2019	1/23/2019	Counseling Notes	
doc06792920190123093950(1).pdf	1/18/2019	1/23/2019	Counseling Notes	
CV-42559 (1)(1).pdf	1/9/2019	1/17/2019	Court Orders	
██████████n Crt Report January 2019.docx	1/4/2019	1/4/2019	CASA Court Report - Final	
010919-D██████████h court report.pdf	12/17/2018	12/18/2018	CPS Court Report	
doc06770320190114153408.pdf	10/18/2018	1/14/2019	Other Documents	
CV-42559 (1).pdf	7/19/2018	7/19/2018	Court Orders	
doc06309120180710142021.pdf	7/11/2018	7/11/2018	CASA Court Report - Final	
██████████ D 03.01.2018.pdf	4/20/2018	4/20/2018	Other Documents	
doc05930020180307151048.pdf	3/7/2018	3/7/2018	Court Orders	
██████████ HP.pdf	2/8/2018	2/8/2018	Medical Records	
██████████ HP.pdf	2/8/2018	2/8/2018	Medical Records	
██████████n Crt Report February 2018.docx	1/12/2018	1/12/2018	CASA Court Report - Final	
██████████.pdf	1/11/2018	1/11/2018	Home Study	
██████████(1).pdf	1/11/2018	1/12/2018	Home Study	
CV-42559.pdf	9/8/2017	9/11/2017	Court Orders	
CASA court report for ██████████n 072417.pdf	7/18/2017	7/18/2017	CASA Court Report - Final	
██████████n court report 7-24-17.pdf	7/14/2017	7/14/2017	CPS Court Report	

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