

## ADVOCATE Role in OPTIMA

### Logging into OPTIMA

Before you can work in OPTIMA, you will need to sign into the system. Child Advocates-Denver CASA will create a unique USER NAME for you and a temporary password. You will be required to change this password the first time you use the system.

The first time you use the system you will be prompted to change your password. From this point forward, you will use the password that you selected. If you regularly use the same computer, you can select the option “REMEMBER ME?” which will store only your user name. You will have to enter your password each time you use the OPTIMA system.

Although there is no requirement to change your password on a regular basis, consult your supervisor or system administrator for your program’s rules. To change your password, select “CHANGE PASSWORD”, located at the upper right of the screen. OPTIMA will prompt you to enter your old password, select a new password and confirm your new password. Please remember that your password must be at least six (6) characters in length.

As a supervisor in OPTIMA, you have been selected to work with advocates assigned to active cases. You screens throughout OPTIMA have been organized to help you quickly access the information you need. This will allow you to spend your time working on the more meaningful aspects of volunteer management.

### Understanding the Volunteer Dashboard

Your “VOLUNTEER DASHBOARD” has been prearranged into easy to use tabs. OPTIMA organizes your daily work and arranges your program categories in a way similar to how you might set up files. Across the top of the screen you find three (3) sections: Cases, Training Logs, and Calendar.

**Volunteer Dashboard:** Selecting this option will return you to the present screen from wherever you are in the system. This is your “home” button to return to your sections and tabs.

**Cases:** In the Cases section you are provided with a list of all your assigned cases by case number, case name, determination of a priority status, and start and close dates. It is designed to give you an overview of your case information.

Cases are displayed ten (10) at a time. You have the ability to sort the list by any of the column headings and can move through the list by selecting a specific block of ten (10) cases via the numbers, or by using the arrow to move forward and back through the list.

To the right of each case row you will find two icons. The first will take you to a template to create a contact log record. The second icon will provide you with details about the case.

The case section also allows you to search for a specific case by a variety of factors. You can choose to search a case by either the case number or the case name by entering the information into the appropriate field. Additionally, you can limit your selection to either open or closed cases. Finally OPTIMA gives you the ability to search for a case by either a child’s name or the name of a family member.

From your list of assigned cases, you are able to see more detail about each case. Selecting the magnifying glass icon to the right of each case row, OPTIMA takes you into the case detail record. OPTIMA provides you with 5 sections in which to review and update pertinent case and program information:

**CASA Assignments:** This field shows you the current advocate assignment for the cases and for each child. It has the ability to list more than one advocate should there be multiple advocates on a case. The screen will also display important contact information for the advocates.

**Children in Case:** This overview lists all the children that are associated with a case. The magnifying glass icon to the right of each child's row will provide you with detailed information regarding that child.

**Current Placement:** This overview lists all the current placements for the children that are associated with a case. The magnifying glass icon to the right of each child's row will provide you with detailed information regarding that placement.

**Family Members:** This overview lists all the family members that are associated with a case. The magnifying glass icon to the right of each child's row will provide you with detailed information regarding that family member in relation to the child.

**Associated Parties:** This overview lists any party that is associated with a case. The magnifying glass icon to the right of each party's row will provide you with detailed information regarding that party in relation to the child.

Finally, at the bottom of the window are tabs that detail the happenings of the case as it progresses. It is here that all the documents and events of a case are easily organized and quickly accessed. These tabs include:

**Contact Logs:** As advocates submit records about the activities on the case, their contact logs entries can be found and reviewed here. You can sort the entries by selecting any of the column headings.

**Associated Parties:** This overview lists any party that is associated with a case. The magnifying glass icon to the right of each party's row will provide you with detailed information regarding that party in relation to the child.

**Petitions and Allegations:** Program staff and advocates can keep track of the legal documents associated with a case in this tab. As parties file for hearings, these records can be stored for easy reference in this tab. By selecting "ADD" in this tab, program staff can input the hearing date, time and location. Additionally, staff can input the need for a court report from the advocate and its date due. This section can be filled out either before a hearing occurs if the program has notice or after the event when the program receives confirmation.

**Hearings:** Program staff and advocates can keep track of the legal documents associated with a case in this tab. As parties file for hearings, these records can be stored for easy reference in this tab. By selecting "ADD" in this tab, program staff can input the hearing date, time and location. Additionally, staff can input the need for a court report from the advocate and its date due. This section can be filled out either before a hearing occurs if the program has notice or after the event when the program receives confirmation.

**Placement History:** As staff and advocates update a child’s placement location, OPTIMA automatically keeps a running history of the locations and dates that a child was living at a placement.

**Case Closing Information:** Once a case is ready to be terminated, program staff can quickly end the case. In this window, staff has the option of closing a case as to both the court and the program or only to the program while leaving the case open in the court system. In both instances, staff will select a reason for the closing based on an option provided in the drop down menu. Closing a case in this window closes the case throughout the system

**Training Logs:** As you complete your requisite trainings throughout the year, you are able to record the classes and submit them to your supervisor for approval. Much like the contact log process,

**Calendar:** OPTIMA provides you with the ability to capture events for both advocates and programmatically. In the calendar tab, you have the ability to be record important events as well as seeing what else is happening. The calendar defaults to showing the current day. To see additional options, select “TODAY”. This will provide the additional option to view the calendar weekly, monthly by specific volunteer or in an agenda view. *The calendar feature also allows you to create an event for multiple volunteers. You will be able to place important programmatic and case related events of advocates and staff’s calendars. These events can be case related if necessary.*

**Address Book:** The ADDRESS BOOK feature of OPTIMA provides you a way to keep important programmatic and resource contacts that are not necessarily associated with a specific case. Because OPTIMA provides you with easy access to both advocate and associated party contact information easily, the ADDRESS BOOK is a way that you can keep other contacts as accessible.

**Personal Info:** OPTIMA gives advocates the ability to update their own personal information. When advocates make changes, OPTIMA makes the change throughout the system thus reducing numerous repeated changes.

## DAY-TO-DAY Advocacy

OPTIMA streamlines the process of creating your most important documents: your contact logs.

### CREATING A CONTACT LOG ENTRY:

Advocates will keep their case notes and records in OPTIMA instead of in notebooks or separate electronic files. To create a contact log entry, advocates can either select the “NEW CONTACT LOG” entry icon at the right of the case row, or select “ADD” from the contact log tab in the case detail screen.

In the contact log entry window, OPTIMA will prompt you to provide all the necessary and relevant information. You will select with whom you had contact. Multiple selections are allowed. Please note that the ACTIVITY DATE will default to the current date. We hope that you are putting in contacts as soon as they occur. However, if you need to backdate a contact, simply change the date. Please remember to use a four digit year. You will choose the ACTIVITY TYPE and CONTACT TYPE from the predetermined drop down menus and input the number of hours, mileage and expenses as required by your program. Please note that HOURS and MILEAGE need to be reported in decimals. HOURS will be calculated in minutes. For example, an hour and a half contact would be recorded as “90.0”. Mileage is also record in decimals. 15 miles is recorded as 15.0. Mileage logs can be printed out at the end of the year for those volunteer’s who need this information for tax purposes. Ask your supervisor for your mileage form.

In the NOTES section, you will create the narrative regarding the activity and results of the contact. Once this is completed, select “CREATE”. This action will send your contact log to your supervisor for approval. The contact entry will appear in your contact log queue as having the status of “PENDING” until it is either approved or denied by your supervisor. Once the contact entry is approved, OPTIMA automatically removes it from your queue and places the entry into the contact log tab on the case detail screen.

It is very important to remember that your NOTES field is limited to 5000 characters. This is approximately one and a half pages of single spaced text. It is usually more than enough space for a contact note. If you go over 5000 characters, OPTIMA will turn the field red and it will not allow you to save your work. If you go off the page, you will lose everything you have typed. So, if the field turns red, it is best to eliminate some text, then save the entry and create a new one for the rest of the text.

You contact notes will be stored in the CONTACT LOG tab at the bottom of the case screen. Although OPTIMA defaults to the display to the most recent, you can organize or sort the information simply by selecting one of the column headings. To view the contact entry, select the icon to the right of the contact row. OPTIMA will display the contact for you and will provide information associated with the contact including the parties contacted, the type of contact and the notes from the advocate.

You have the option to see a complete list of your contacts by selecting the VIEW NOTES button. OPTIMA will open a new screen in which all your approved contacts are displayed.

OPTIMA shows you the status of the contacts in a separate column. You have three options of status for your contacts. APPROVED means that you supervisor has read your contact and has approved the contents. Once a contact is approved, it is locked down and you will be unable to change it. If you find a mistake in the contact, notify your supervisor. She may be able to make an update to your contact.

PENDING means that a contact is waiting for your supervisor to read it. Every time you submit a contact, it goes onto a queue for your supervisor to read and approve. Pending means that your contact is in the queue. You can make changes to a contact anytime it is in the PENDING status.

DENIED means that the supervisor has a concern about what you wrote and has denied the contact. You will be able to open the contact and modify it. It is a usual practice for you supervisor to write her concern directly in the notes field. Many supervisors preface it with their initials. You will be able to make the modifications and resubmit the contact.

### Case Management in OPTIMA:

When logging into your case, you will now have access to a lot of information. By carefully exploring the various sections, you will become more familiar with OPTIMA's features.

OPTIMA divides a case into easily accessible and functional sections. Each section has been designed to give you the most common and important information up front and then the ability to drill into the information through the use of the magnifying glass icon.

**CASE INFORMATION:** This section provides you with an overview of the case. It is here that the program staff will add notes to explain important information in the case, provide some advocacy direction and in general explain what is happening.

**CASA ASSIGNMENTS:** This provides you with a history of all the CASA staff and volunteers who have been assigned to this case. If there are multiple volunteers, they will all be displayed here. When there is contact information – phone numbers and email address – they will be found in this section.

**CHILDREN IN CASE:** Important information about the children is located here. Next hearing dates for the children are displayed in this section. It is possible for children to have different hearing dates. If there is no hearing date displayed, then either there is no hearing scheduled, or a child has not been associated with a scheduled hearing.

The magnifying glass icon will bring you into a screen with more details about the child. At the bottom of the screen is a series of action and information tabs. In the first three you will be able to capture important information about the child in the areas of language needs, disabilities, and school history. Discuss with your supervisor how best to use these tabs.

Additionally, OPTIMA will show you information about this child's placement history and hearings. These are meant as information tabs only. Changes are made from the main screen. Finally the Closing Information tab is completed when the child's association with the case ends.

**CURRENT PLACEMENTS:** The section shows you where the children are currently being housed. When available, you will be provided with contact information for the placements.

**FAMILY MEMBERS:** A list of all relations to the child can be displayed here as they become available.

At the bottom of the screen are more action and information tabs.

**CONTACT LOGS:** For details, please see the preceding section on contact notes.

**ASSOCIATED PARTIES:** For those people who are neither family members nor the children, a separate tab has been created to display them. All other people with an association to the case are displayed here. The tab will show you their role and association to the child or family member.

**COURT REPORTS:** For details, please see the preceding section on court reports.

**DOCUMENTS:** Case documents can be scanned and upload into this section. Please discuss with your supervisor the program's naming conventions for the documents and allowable types.

**PETITIONS AND ALLEGATIONS:** The court record of the reason children came into care and the outcomes associated with the petitions are stored in this section.

**HEARINGS:** A chronology of all the hearing for the case is found here.

**PLACEMENT HISTORY:** A chronology of all the placements for all the children for the case is found here.

**CASE CLOSING INFORMATION:** When a case is closed by the program staff, all relevant information is stored in this tab.

### **Logging Off of OPTIMA**

It is important to always log off of the OPTIMA system when you finished. By selecting the "LOG OFF" option at the top right of the screen, OPTIMA will close the screens on which you have been working and return the system to the initial screen.

Additionally, simply closing the browser window will end your session within OPTIMA.