

Optima Step-by-Step User Guide

Updated March 2021

Username: _____ **Password:** _____

THE BASICS

Access

This step-by-step guide will show you how to access and enter data into the specific sections that you'll use most frequently in your work as a CASA Volunteer Advocate.

- **Access Optima** by clicking on the large **Optima** on the first page of our website: <https://www.bergencasa.org/>
- Your **Username** is your firstname.lastname (it's not case-sensitive). For example, for Jane Doe it's jane.doe Your **default password** is 123456.

How to create a strong password: <https://support.microsoft.com/en-us/help/4091450/windows-protect-passwords>

If you still have difficulty logging in, email lauren@bergencasa.org to have your password restored to the default.

General Tips

- **Blue buttons** are used to move back and forth between areas within your Optima account. When this button is present, use this instead of the back arrow in your web browser.
- **Green buttons** — labeled either **Add** or **Edit** — are used to enter or update information.
- After entering or updating info, there will be a **green Create** or **Save** button at the bottom of the window; be sure to scroll down and click it, otherwise your entry will be lost.
- Click on the  in the Action column of any list item to **View** it.
- Click on  in the Action column of any list item to **Edit** the item.
- You'll enter all case-related information by clicking on one of the **"tabs"** at the bottom of your Volunteer Dashboard. **Tabs are labeled in blue type** and separated by vertical lines. See below:



**Volunteers
Dashboard**



Help

Address Book

Personal Info

Cases

To-Do List

Training Logs

Non-Case

Calendar

New Docs

Case Number ▲

Case Name ▲

- Click on the orange Volunteers Dashboard on the top left corner of every screen to return to your home screen.

GETTING STARTED

Change Your Password from the default (123456)

Update Your Personal Information

The first time you log into Optima, select the **light blue button** at the top left of the screen that says **Personal Info**. As you scroll down the page you'll find sections with **orange headings** for **Demographics, Emergency Contacts, and Employment** and **About**.

- Select the **green buttons** under sections to add or edit information.
 - **Demographics:** complete entire section.

 - **Emergency Contacts:** complete entire section.

 - **Employment:** Fill in career type, employment status, company, and address.

CASE WORK

At the top of your home screen there are 6 tabs: **Cases, To-Do List, Training Logs, Non-Case, Calendar and New Docs.**



**Volunteers
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Entering a Contact on a Case

- Click the first tab: **Cases**.
- Click on the **Case Number** to open your current case.
- Scroll to the bottom of the next page; you'll see a new set of tabs.
- Under the **Contact Logs** tab, select the **green button** that says **Add**. You'll be taken to the Contact Log page.
- Enter the date, activity type, and contact type from the drop down menus. Enter a subject, if appropriate.
- Enter the hours spent on the activity.

Time as entered in Optima	Amount of Time Spent
0.25*	15 minutes
0.50	30 minutes
0.75	45 minutes
1.0	60 minutes or one hour
1.25	1 hour and 15 minutes

1.50	1 hour and 30 minutes
1.75	1 hour and 45 minutes
2.0	Two hours

*Note - All times spent less than 0.25 minutes should be added as 0.25 minutes.

- Check off the boxes of any people who you contacted directly. If they are not in the contact list, enter them as **Others Contacted** if you will not be contacting them regularly.
- Add any relevant notes, then select the **green button** that says **Create** to save your entry.
- Your new activity will appear on your Case Supervisor’s Optima dashboard.
- *Please enter your updates within 48 hours of the contact.*
- *Once your contact log has been approved, you will not be able to amend it.*

Note - all contact notes for a particular month are to be entered by the last day of the month.

Updating Child Info on a Case

- From your homepage, select your case under the **Cases** tab.
- Scroll down to the **Children in Case** section.
- Click on the picture of the magnifying glass next to the name of the child you want to update.
- Scroll to the bottom section to edit the child’s **Language, Disabilities, and School Information.**

Tabs under Child Details

Press the magnifying glass at the right of your child’s name under **Action**. You will see tabs along on the bottom of the page.

Languages

- Choose a language from drop down. If not there, choose “other.”

Disabilities

- Choose from drop down (these are not necessarily IEP classifications).

Schools

- Check whether or not child has either an IEP, 504 plan or I&RS plan.
- Indicate the date the plan will be reviewed (renewal date).
- Add the new school from the drop-down menu. If school is not there, call your CASA Case Supervisor and she/he will have the additional school added to the school drop down menu.

Click the **green button** that says **Create** after inputting each section's new information.

Adding a Placement to the Case

When a child is moved, you will need to update the placement information.

As a reminder, before updating a placement, the facility, resource parent or family member must already be in the Optima drop down menu. If a person is not in drop down menu under "Interested Party", you will need to create an Associated Party before updating placement information. If the Facility is not in the drop-down menu, please contact your CASA Case Supervisor so that the facility may be added.

- On the case's main screen, scroll down to **Current Placements**.
- Click the **green button** that says **Add** to add a new placement.
- Check the child's name connected to that particular placement.
- If placement was determined during a hearing, select the correct date from the drop-down menu.
- Enter the beginning date in **From** and the end date in **To**. An open **To** date means it is their current placement.
- **With Siblings** and **Placement Type** are required fields.
- Optima should automatically close an old placement. If this does not happen, contact your CASA Case Supervisor.

Adding Associated Parties to the Case

- On the case's main screen, scroll all the way down.

- Select **Associated Parties** (3rd tab from left) and click the **green ADD button**.
 - Select the correct party type and the name of the associated party on the dropdown menu. Click the **green button** that says **Save** to continue.
 - **If an Associated Party is NOT in the drop-down menu (Attorney, Caseworker, or Interested Party), then the person will need to be added by clicking the New button.** Then you will need to create the profile for the person with as much information as you have, and press **Save**. Once you press **Save**, it will bring you back to the screen where you choose the **Party Type** and you can then choose the associated party who you just created and press **Save** and Optima will connect that person to your case.
- You can also note the associated party's relationship to those involved in the case.
- In the **Child** section, click **Add** to enter the start date with the children in the case.
 - Check the box next to the appropriate child(ren).
 - Enter the assigned date.
 - Select **Create**.
- In the **Family** section, click **Add** to enter the start date with the children in the case.
 - Check the box next to the appropriate family members.
 - Enter the assigned date.
 - Select **Create**.

Uploading Documents (including Court Orders)

- On the **Case** page, scroll down to the section with **Contact Logs**. Select the **Documents** tab.
- Click the **green button** that says **Add**.
- Click the **Choose Files** button, then locate the file where you've saved it in your computer (when you create your Court Report or other document, save it so that you can easily find it).
- Click **Create**.

Note – Court Reports uploaded should be the Final, not draft(s).

Reviewing your Hearings

- On the **Case** page, scroll down to the section with **Contact Logs**. Select the **Hearings** tab.
- Your CASA Case Supervisor should be putting in all the dates of all hearings. You can read the notes on each hearing by clicking on the magnifying glass to its right

Non-Case Related

Recording Continuing Education Training

- On your main screen, select the **Training Log** tab. Hit the **green button** that says **Add**.
- Enter all information. Click **Create**.
- If the name of the training you took isn't in the drop-down list or you're unsure about the correct name or amount of hours, please contact your CASA Case Supervisor for guidance.

Entering Non-Case Volunteer Activity

- On your homepage, select the **Non-Case** tab. Click the **green button** that says **Add**.
- Click **Create** after all information has been added.
- If you're unsure about how to classify your activity, please contact your case supervisor for guidance.

Using Optima on a Mobile Device

You can access your Optima account right in a web browser, no need to download/install a special app. When you log-in to Optima on your phone or tablet, you are automatically taken to the mobile version of Optima (it's called OptimaGo).

The mobile version has a clean user interface that makes it easy to view and input the case data that you're most likely to use while away from your desktop computer.

- Go to the CASA Morris homepage: <https://www.casamsc.org/>
- Scroll to the bottom and click on the big **Optima Log-In**. You'll be taken directly to the Optima mobile site.
- Enter Username and Password in the appropriate fields.
- Click the blue button that says **Login**. **DO NOT** click **Go to Desktop Site**.
- At the bottom of the screen is a blue bar with 3 labels: **Home, My Cases, Go to Site**.
- Click on **My Cases**; the name(s) of your case(s) appear at the top.
- Click on the name of the desired case to access the mobile case management screen.
- The available information is classified under **Contact Logs, Documents, and Hearings**. Scroll through the page, select and click on the Blue text under each category to **view or enter information**. Click the **Plus signs** to enter information for each topic. Fill in all appropriate information in the available entry fields.
- If you need to access information that isn't available within the mobile site, you can click on **Go to Site** at the bottom of the screen to visit the same site that you see on your desktop computer.
- **Talk-to-text** is a function of your device, *not* a function of Optima. You can use this function as you would for any other purpose.