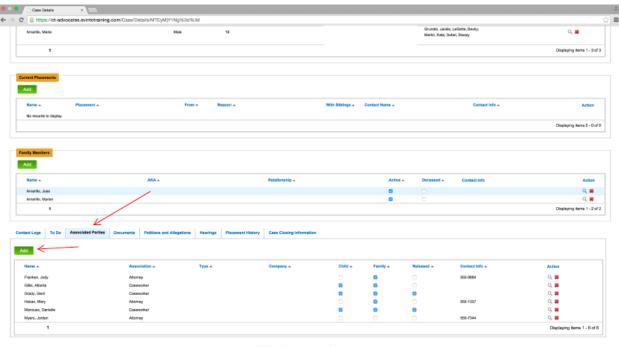
CHILD ADVOCATES OF CT OPTIMA CASE MANAGEMENT SOFTWARE

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ADDING A NEW ASSOCIATED PARTY TO A CASE & LINKING THE NEW PARTY TO THE CHILD/FAMILY

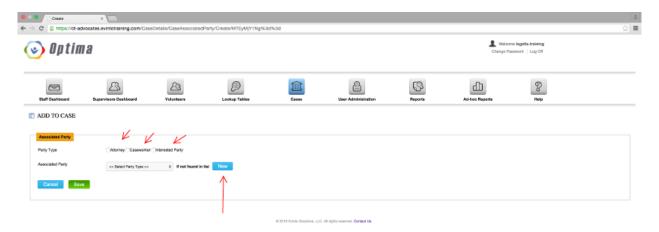
ADDING AN ASSOCIATED PARTY

- After you sign in to Optima, you will be at your "Volunteer Dashboard" which will show a box highlighted in orange near the top left of your screen.
- On the "Cases" tab on your tool bar, click on your Case Number (or the magnifying glass icon) to be taken to the Case Details page
- Scroll to the bottom of the Case Details page, and click on the Associated Parties tab (third tab from the left)
- On the "Associated Parties" tab, click on the green "Add" button, which takes you to the "Add to the Case" section

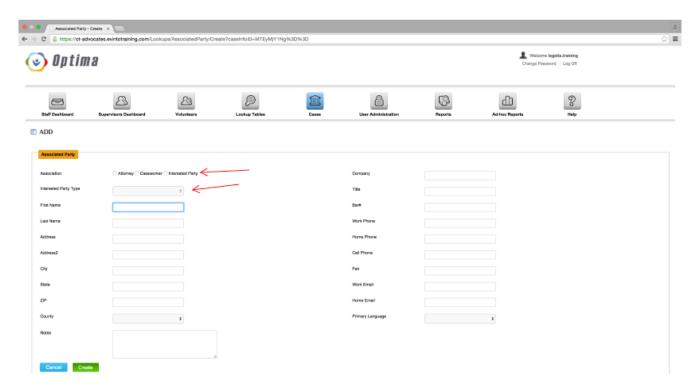


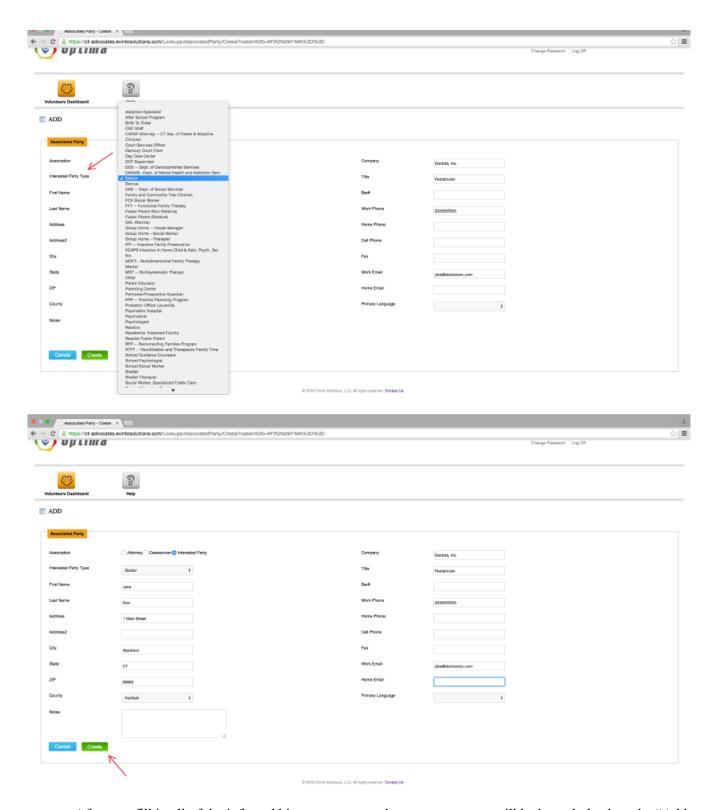
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- If you click on the "Interested Party" (or "Attorney" or "Caseworker") button and the person's name isn't already listed in the drop-down menu, click on the light blue "If not found in the list New" button to add him/her
- Please note: The "Caseworker" association should only be used for DCF caseworkers; all other social workers, etc. should be entered as "Interested Party"

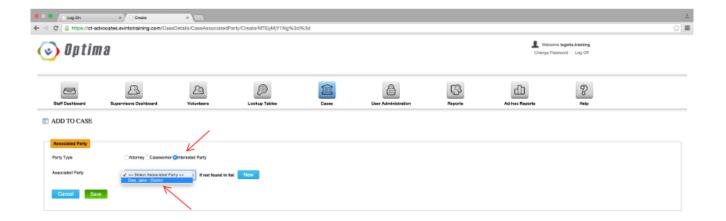


- Complete all of the applicable information for the new Associated Party. Hit the green "Create" button when finished.
- Please note: These Associated Parties appear as "universal information" in Optima, as they may also be assigned on other cases (e.g. therapists, caseworkers, etc.) therefore, please do not enter information pertaining to your case in the "Notes" field because it will also show up on other cases where the Associated Party is attached.

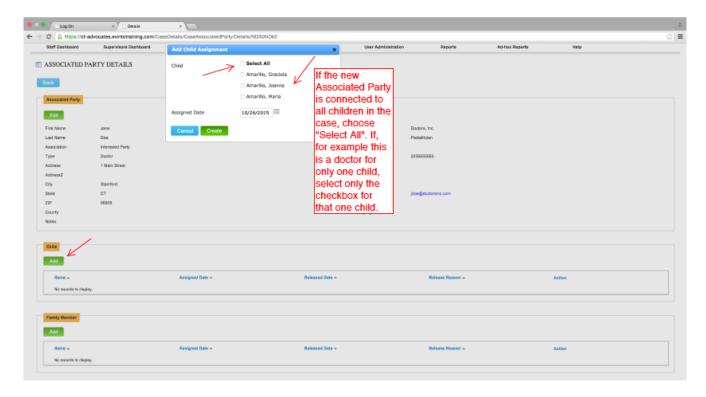


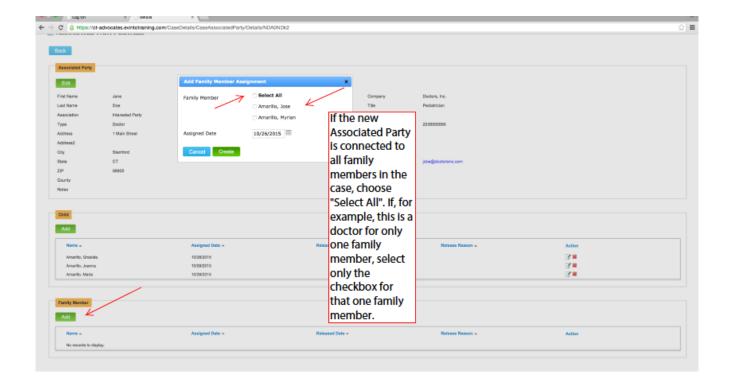


• After you fill in all of the info and hit create to save the new party, you will be brought back to the "Add to Case" page. Select the "Party Type" (Interested Party, Attorney, Caseworker) of the person you just added, you will see that new person in the dropdown list, be able to select them, and save.

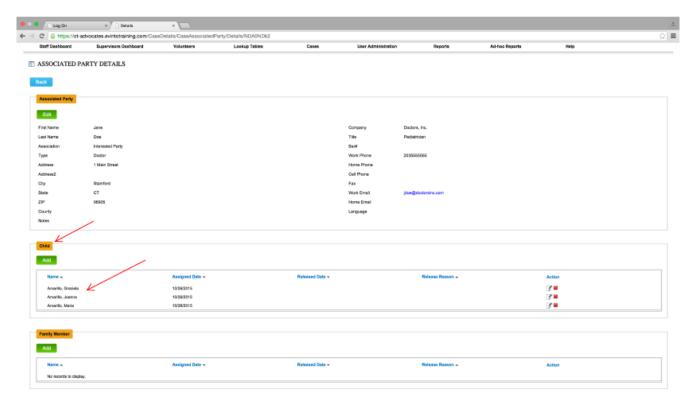


- Once you hit "save" to add them to the case, it brings you to the Associated Party Details page. On the Associated Parties detail page, click on "Add" in either the middle "Child" section, or bottom "Family" section (or both, if applicable) to appropriately link the party to your child (and/or family member). Enter the date that the party was assigned to the child/family member. Hit "Create" to save.
- Linking the Associated Party to the child is an important step, as it helps us track and report on the number of parties who move in and out of the child's life during the period that you, the volunteer advocate, remain a steady presence in the child's life.

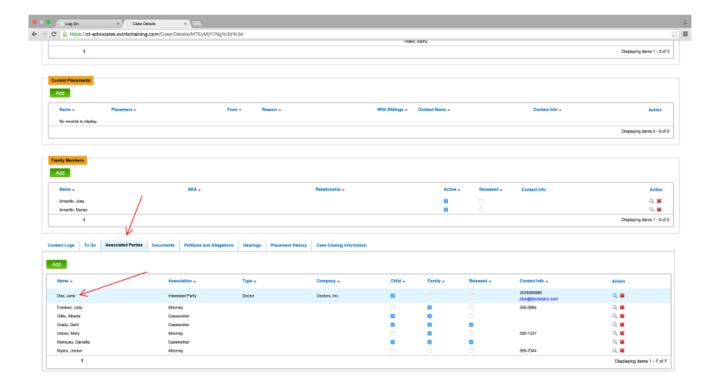




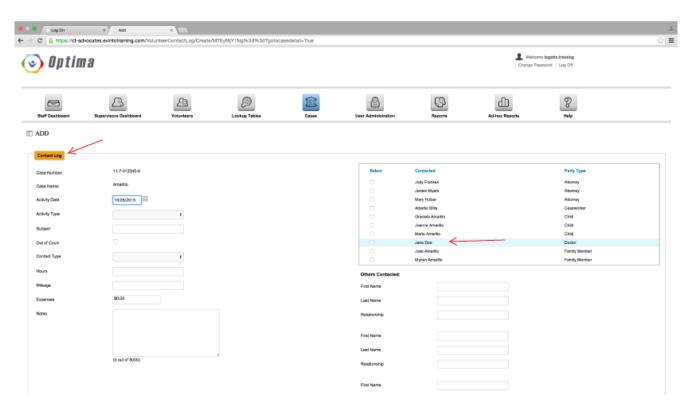
• Once you hit "create" to save, you will see that the child's/children's (or family member's) name has been added to the Associated Party Details page.



- When you go back (by hitting the light blue "Back" button toward the top of the page) to the Associated Parties tab, the Associate Party will be included in the list, along with information regarding whether they are linked to the child, family, etc.
- You can edit or see details for each Associated Party by clicking on the magnifying glass in the "Action" column.

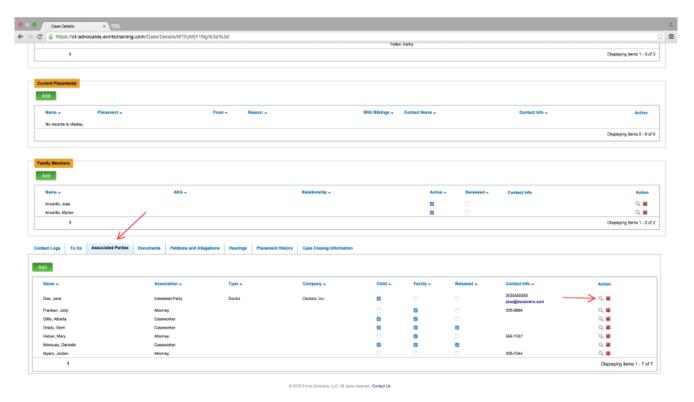


• The new Associated Party will also now show up in the box on the right in the Contact Logs as an option for you to select as "Contacted"

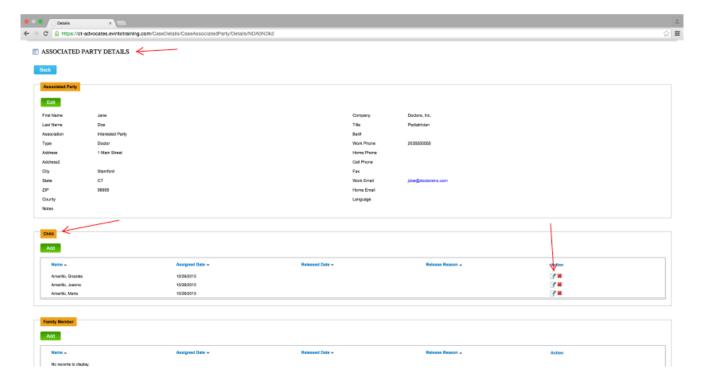


RELEASING AN ASSOCIATED PARTY

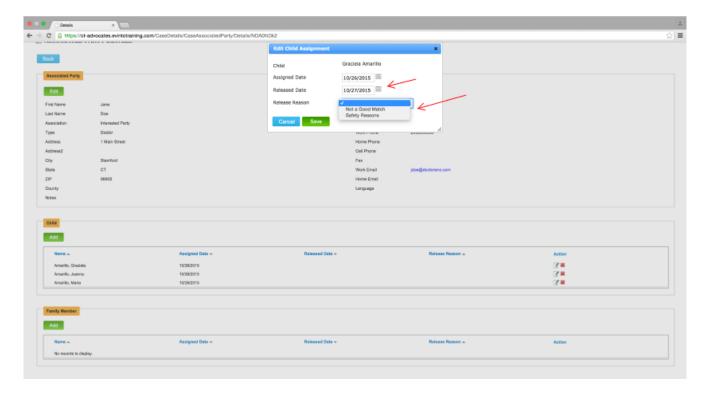
- As mentioned above, Optima will help us track and report on the number of parties who move in and out of the child's life during the period that you, the volunteer advocate, remain a steady presence.
- Therefore, it is important that you "release" any associated parties when they are no longer associated with the child.
- From the "Associated Parties" tab on the Case Details page, click on the magnifying glass icon for the party you are going to release



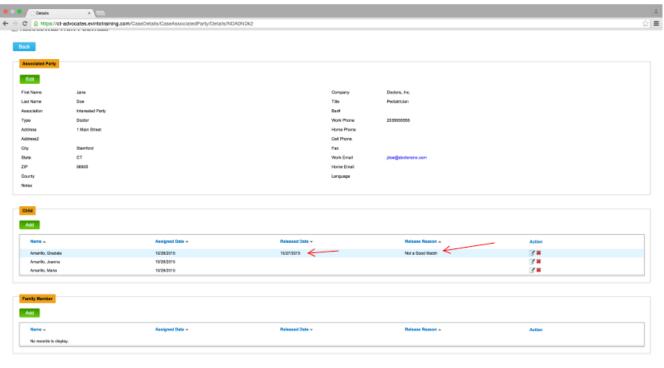
• This brings you to the Associated Party Details page. In the Child section, click on the pen/paper icon for the applicable child(ren).



• This allows you to edit the Child Assignment. Select the Released Date, and a Release Reason from the drop-down menu, and Save.



• The Released Date and Release Reason will now appear in the Child section of the Associated Party Details Page. If there are multiple children in the case, repeat the steps for each child to release the Associated Party (if applicable). If there are Family Members to be released as well, repeat the steps to release them.



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• On the Associated Parties tab, the person will now have a checkbox in the "Released" column, showing that they are no longer linked to the child.

