

CHILD ADVOCATES OF CT OPTIMA CASE MANAGEMENT SOFTWARE

-

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

The screenshot displays the Optima Case Management Software interface. At the top, the 'Case Details' section shows a case for 'Anzorillo, Maria' with a date of '16'. Below this, there are sections for 'Current Placements' and 'Family Members'. The 'Family Members' section lists 'Anzorillo, Juan' and 'Anzorillo, Myrian'. A red arrow points to the 'Associated Parties' tab in the bottom navigation bar. Another red arrow points to the 'Add' button in the 'Associated Parties' section. The 'Associated Parties' section contains a table with columns: Name, Association, Type, Company, Child, Family, Released, Contact Info, and Action.

Name	Association	Type	Company	Child	Family	Released	Contact Info	Action
Franken, Jody	Attorney			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	555-9894	
Gillis, Alberta	Caseworker			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Grady, Gent	Caseworker			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Holzer, Mary	Attorney			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	555-1337	
Marquand, Danielle	Caseworker			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Myers, Jordan	Attorney			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	555-7344	

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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"

Optima

Welcome legette.training
Change Password | Log Off

Staff Dashboard Supervisors Dashboard Volunteers Lookup Tables Cases User Administration Reports Ad-hoc Reports Help

ADD TO CASE

Associated Party

Party Type: ☐ Attorney ☐ Caseworker ☐ Interested Party

Associated Party: << Select Party Type >>

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- 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.

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ADD

Associated Party

Association: ☐ Attorney ☐ Caseworker ☐ Interested Party

Interested Party Type:

First Name:

Last Name:

Address:

Address2:

City:

State:

ZIP:

County:

Notes:

Company:

Title:

Birth:

Work Phone:

Home Phone:

Cell Phone:

Fax:

Work Email:

Home Email:

Primary Language:

Associated Party - Create

https://ct-advocates.evinetools.com/Lookups/AssociatedParty/Create?caseInfoID=MTA2MzE1MA%3D%3D

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Volunteers Dashboard

ADD

Associated Party

Association

Interested Party Type

First Name

Last Name

Address

Address2

City

State

ZIP

County

Notes

Cancel Create

Adoption Specialist
After-School Program
Birth To Three
CAC Staff
CAAP Attorney - CT Ass. of Foster & Adoptive
Clinician
Court Services Officer
Danbury Court Clerk
Day Care Center
DCF Supervisor
DDS - Dept. of Developmental Services
DMHMS-Dept. of Mental Health and Addiction Serv.
Doctor
Domestic
DSS - Dept. of Social Services
Family and Community Tree Clinician
FCA Social Worker
FFT - Functional Family Therapy
Foster Parent (Non-Relative)
Foster Parent (Relative)
GAL Attorney
Group Home - House Manager
Group Home - Social Worker
Group Home - Therapist
IFP - Intensive Family Preservation
IGAPS Intensive In Home Child & Adol. Psych. Ser.
Kin
MFFT - Multidimensional Family Therapy
Mentor
MST - Multisystemic Therapy
Other
Parent Educator
Parenting Center
Paternal/Prospective Guardian
PPP - Positive Parenting Program
Probation Officer (Juvenile)
Psychiatric Hospital
Psychiatrist
Psychologist
Relative
Residential Treatment Facility
Respite Foster Parent
RFP - Reconnecting Families Program
RFTT - Reunification and Therapeutic Family Time
School Guidance Counselor
School Psychologist
School Social Worker
Shelter
Shelter Therapist
Social Worker, Specialized Foster Care

Company

Title

Birth

Work Phone

Home Phone

Cell Phone

Fax

Work Email

Home Email

Primary Language

Doctors, Inc.
Pediatrician
2025555555
jswell@doctorsinc.com

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Associated Party - Create

https://ct-advocates.evinetools.com/Lookups/AssociatedParty/Create?caseInfoID=MTA2MzE1MA%3D%3D

Change Password | Log Off

Volunteers Dashboard

Help

ADD

Associated Party

Association

Interested Party Type

First Name

Last Name

Address

Address2

City

State

ZIP

County

Notes

Cancel Create

Attorney Caseworker Interested Party

Doctor

June

Das

1 Main Street

Stamford

CT

06906

Hartford

Company

Title

Birth

Work Phone

Home Phone

Cell Phone

Fax

Work Email

Home Email

Primary Language

Doctors, Inc.
Pediatrician
2025555555
jswell@doctorsinc.com

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- 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.

Log On Create

https://ot-advocates.evintraining.com/CaseDetails/CaseAssociatedParty/Create/MTEyMjY1Ng163d93d

Optima

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ADD TO CASE

Associated Party

Party Type
☐ Attorney
☐ Caseworker
☒ Interested Party

Associated Party
☒ No Select Associated Party
[Look up by Device](#)

Cancel 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.

Log On Details

https://ot-advocates.evintraining.com/CaseDetails/CaseAssociatedParty/Details/NOAGNDK2

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ASSOCIATED PARTY DETAILS

Back

Associated Party

Edit

First Name Jane
 Last Name Doe
 Association Interested Party
 Type Doctor
 Address 1 Main Street
 Address2
 City Stamford
 State CT
 ZIP 06905
 Country
 Notes

Child

Add

Family Member

Add

Add Child Assignment

Child
☒ Select All
☐ Amarillo, Graciela
☐ Amarillo, Joanna
☐ Amarillo, Maria

Assigned Date 10/26/2015

Cancel Create

If the new Associated Party is connected to all children in the case, choose "Select All". If, for example this is a doctor for only one child, select only the checkbox for that one child.

Doctors, Inc.
 Pediatrician
 2039995555
 jdoe@doctorsinc.com

Name Assigned Date Released Date Release Reason Action

No records to display.

Name Assigned Date Released Date Release Reason Action

No records to display.

Add Family Member Assignment

Family Member ☐ Select All ☐ Amarillo, Jose ☐ Amarillo, Myrlean

Assigned Date: 10/26/2015

[Cancel](#) [Create](#)

If the new Associated Party is connected to all family members in the case, choose "Select All". If, for example, this is a doctor for only one family member, select only the checkbox for that one family member.

- 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.

Associated Party Details

[Back](#)

Associated Party

[Edit](#)

First Name: Jane
Last Name: Doe
Association: Interested Party
Type: Doctor
Address: 1 Main Street
Address2:
City: Stamford
State: CT
ZIP: 06905
County:
Notes:

Company: Doctors, Inc.
Title: Pediatrician
Email: jdoe@doctorsinc.com
Work Phone: 2035555555
Home Phone:
Cell Phone:
Fax:
Work Email:
Home Email:
Language:

Child

[Add](#)

Name	Assigned Date	Released Date	Release Reason	Action
Amarillo, Graciela	10/26/2015			Edit Delete
Amarillo, Joana	10/26/2015			Edit Delete
Amarillo, Maria	10/26/2015			Edit Delete

Family Member

[Add](#)

Name	Assigned Date	Released Date	Release Reason	Action
No records to display.				

- 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.

Log On Case Details
<https://ot-advocates.evintraining.com/Case/Details/MTEyMjY1Ng%3d%3d> You're, KATY
 Displaying items 1 - 3 of 3

Current Placements
 Add

Name	Placement	From	Reason	With Siblings	Contact Name	Contact Info	Action
No records to display.							

 Displaying items 0 - 0 of 0

Family Members
 Add

Name	AKA	Relationship	Active	Deceased	Contact Info	Action
Amarillo, Jose			<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Amarillo, Myrle			<input checked="" type="checkbox"/>	<input type="checkbox"/>		

 Displaying items 1 - 2 of 2

Associated Parties
 Add

Name	Association	Type	Company	Child	Family	Released	Contact Info	Action
Doe, Jane	Interested Party	Donor	Doe's, Inc.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2039955555 jane@doesinc.com	
Franklin, Judy	Attorney			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	555-9884	
Giles, Alberta	Caseworker			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Grady, Gent	Caseworker			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Holzer, Mary	Attorney			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	555-1337	
Mancos, Danielle	Caseworker			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Myers, Jordan	Attorney			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	555-1244	

 Displaying items 1 - 7 of 7

- 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"

Log On Add
<https://ot-advocates.evintraining.com/Volunteer/ContactLog/Create/MTEyMjY1Ng%3d%3d?gotocasedetail=True> Welcome Jorgette, training
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Optima

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ADD

Contact Log

Case Number: 11-7-012345-0
 Case Name: Amarillo
 Activity Date: 10/26/2019
 Activity Type:
 Subject:
 Out of Court: ☐
 Contact Type:
 Hours:
 Mileage:
 Expenses: \$0.00
 Notes:

Select **Contacted** **Party Type**

<input type="checkbox"/>	Jody Franklin	Attorney
<input type="checkbox"/>	Jordan Myers	Attorney
<input type="checkbox"/>	Mary Holzer	Attorney
<input type="checkbox"/>	Alberta Giles	Caseworker
<input type="checkbox"/>	Graciela Amarillo	Child
<input type="checkbox"/>	Juanne Amarillo	Child
<input type="checkbox"/>	Maria Amarillo	Child
<input checked="" type="checkbox"/>	Jane Doe	Donor
<input type="checkbox"/>	José Amarillo	Family Member
<input type="checkbox"/>	Myrle Amarillo	Family Member

Others Contacted:

First Name:
 Last Name:
 Relationship:
 First Name:
 Last Name:
 Relationship:
 First Name:

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

The screenshot shows the 'Case Details' page for a case named 'Yulen, Kathy'. The 'Associated Parties' tab is active, displaying a table of parties. A red arrow points to the magnifying glass icon in the 'Action' column for the first party, Jane Doe.

Name	Association	Type	Company	Child	Family	Released	Contact Info	Action
Doe, Jane	Interested Party	Doctor	Dodans, Inc.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2035500555 jdoe@dodansinc.com	
Franken, Judy	Attorney			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	555-2554	
Gills, Alberta	Careworker			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Grady, Clint	Careworker			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Holzer, Mary	Attorney			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	666-1337	
Manous, Danielle	Careworker			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Myers, Jordan	Attorney			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	555-7344	

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

The screenshot shows the 'Associated Party Details' page for Jane Doe. The 'Child' section is active, displaying a table of children. A red arrow points to the pen/paper icon in the 'Action' column for the first child, Anwarillo, Graciela.

Name	Assigned Date	Released Date	Release Reason	Action
Anwarillo, Graciela	10/06/2015			
Anwarillo, Joaquin	10/06/2015			
Anwarillo, Mateo	10/06/2015			

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

Edit Child Assignment

Child: Graciela Amarillo

Assigned Date: 10/26/2015

Released Date: 10/27/2015

Release Reason: ☒ Not a Good Match Safety Reasons

Cancel Save

Associated Party

Edit

First Name: Jane
Last Name: Doe
Association: Interested Party
Type: Doctor
Address: 1 Main Street
Address2:
City: Stamford
State: CT
ZIP: 06905
County:
Notes:

Home Phone:
Cell Phone:
Fax:
Work Email: jane@doctorsinc.com
Home Email:
Language:

Child

Add

Name	Assigned Date	Released Date	Release Reason	Action
Amarillo, Graciela	10/26/2015			
Amarillo, Joana	10/26/2015			
Amarillo, Maria	10/26/2015			

Family Member

Add

Name	Assigned Date	Released Date	Release Reason	Action
No records to display.				

- 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.

Associated Party

Edit

First Name: Jane
Last Name: Doe
Association: Interested Party
Type: Doctor
Address: 1 Main Street
Address2:
City: Stamford
State: CT
ZIP: 06905
County:
Notes:

Company: Doctors, Inc.
Title: Pediatrician
Sex:
Work Phone: 2039999999
Home Phone:
Cell Phone:
Fax:
Work Email: jane@doctorsinc.com
Home Email:
Language:

Child

Add

Name	Assigned Date	Released Date	Release Reason	Action
Amarillo, Graciela	10/26/2015	10/27/2015	Not a Good Match	
Amarillo, Joana	10/26/2015			
Amarillo, Maria	10/26/2015			

Family Member

Add

Name	Assigned Date	Released Date	Release Reason	Action
No records to display.				

- 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.

Case Details

https://ot-advocates.evintraining.com/Case/Details/MT5yMjY1Ng%3d%3d

Yuan, Kelly

Displaying Items 1 - 3 of 3

Current Placements

Add

Name	Placement	From	Reason	With Siblings	Contact Name	Contact Info	Action
No records to display.							

Displaying Items 0 - 0 of 0

Family Members

Add

Name	AKA	Relationship	Active	Deceased	Contact Info	Action
Anarillo, Jose			<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Anarillo, Myrian			<input checked="" type="checkbox"/>	<input type="checkbox"/>		

1

Displaying Items 1 - 2 of 2

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

ADD

Name	Association	Type	Company	Child	Family	Released	Contact Info	Action
Duo, Jane	Interested Party	Doctor	Dedans, Inc.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2038950595 jduo@dedansinc.com	
Franken, Judy	Attorney			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	666-9664	
Gillis, Alberta	Careworker			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Grady, Gent	Careworker			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Holzer, Mary	Attorney			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	555-1337	
Manzoni, Danielle	Careworker			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Myers, Jordan	Attorney			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	555-7344	

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Displaying Items 1 - 7 of 7

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