CHILD ADVOCATES OF SW CT

OPTIMA FAQs

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**1.** **CHANGING CHILD PLACEMENT**

1.1 Changing the placement

* Once you are in the Case Details section, scroll all of the way down, and click on the "Placement History" tab
* Click on the magnifying glass of the current placement for the child/children that is listed there, which will bring you into the "Placement Details"
* Click the green Edit button
* Enter the end date of this placement in the "To" box
* Enter any notes that you would like to add
* Save
* This will take you back to the "Placement History" tab and that old placement should now be shown with the "From" and "To" dates filled in

**1.2** **Add new placement information to Interested parties**

* On the "Associated Parties" tab, click on the green "Add" button, and when it takes you to the "Add to the Case" section, if you click on the "Interested Party" button and the person's name isn't already in the drop-down menu, click on the blue "(If not found in the list) - New" button to add him/her
* After you fill in all of the info and save to create the new party, if you then go back to the Associated Parties tab, click the "add" button, select the "Party Type" (Interested Party) of the person you just added, then you should see that new person in the dropdown list, be able to select them, and save. Then when you go back to the Associated Parties tab, they should be included in the list (and they should show up in the box on the right in the Contact Logs as an option for you to select)
* On the Associated Parties detail page, in the middle "Child" section, add your child/children, to appropriately link the party to your child

**1.3** **Add information for new placement**

* In the Case Details section, scroll about halfway down, and you will see the yellow box labeled "Current Placements"
* Click the green Add button
* Choose appropriate child/children in the "Children Placed" section at the top
* In the "Placed With" section, choose the new placement from the dropdown menu
* Proceed to fill out all of the other information that you can (leave the "To" date empty since it is the current placement)
* Hit the green Create button when you are done, and the foster family should now appear in the "Current Placements" section (the former placement info will always be kept in the "Placement History" section for your reference)

**1.4** **Release former placement**

* On the "Associated Parties" tab, click on the magnifying glass for the entry of the previous placement
* In the middle "child" section, click on the pen for the child’s entry to edit the child assignment
* Enter the released date and reason
* Save
* The placement info will remain on the "Associated Parties" tab for historical reference, but, e.g., the family's info will no longer appear as a choice in the list of contact people when you enter a contact log

**1.5 create contact log regarding updates**

* Create a Contact Log pertaining to the changes you made to alert your Program Director of the changes, and record the time you spent on the updates

**2.** **"Factors" Tab**

* Please review the "Factors" tab in the Child Details section for each child in your case to make sure it is up to date (this section is used for reporting and our own internal data collection/analysis)
* If any of the following choices apply for a child in the case **(Autism, Cognitive, Learning, Mental Health, Physical, Speech/Language, or Substance Use Disorder),** please click on the green "add" button and select the appropriate choice. If multiple categories apply, continue to add lines until complete.

**3. Cases with Multiple children and more than one volunteer**

**3.1** **case contact logs visible to all volunteers on case**

* If multiple volunteers are assigned to a case, then *all* volunteers will be able to see any "Contact Logs" (created by either of the volunteers, or the Program Director) on the appropriate tab when you scroll down toward the bottom of the case page. Optima is set up this way so that all of the assigned advocates and the Program Director can work collaboratively on the case by sharing information.

**3.2 hearings for entire case vs. hearing for your child/children**

* The "Hearings" tab on the bottom of the **case details** page will include hearings for all of the children on the case. However, if you click on the magnifying glass for **your child** (in the "Children in Case" section) and click on the "Hearings" tab, this will show just the hearings for your child

**3.3 personal information accessibility**

* None of your personal information can be seen/accessed by other volunteers on a case, only the case information

**4.** **Contact logs**

**4.1** **entering contact logs**

* The Contact Logs are where you log ***any work you do on your case***.  This includes any phone calls, meetings, emails, court hearings attended, visits, conversations with your Program Director, etc.  The Contact Logs should be recorded in 15 minute increments, so you should round up to the 1/4 hour (enter .25 for 15 minutes, .50 for 30 minutes, etc.). Also include the time it takes to enter your Contact Logs into Optima.
* After you sign in to Optima, you should be at your "Volunteer Dashboard" which will show a box highlighted in orange at the top of your screen.
* Click on your case number to open up the Case Details.
* Scroll all the way to the bottom to the last tool bar where you'll see "Contact Logs" as the first option.
* Click on "Add" and you will be taken to the next screen where you can enter information from your case.
* It is important to enter: 1) the activity date, Activity Type (from the drop down menu), 2) Contact Type (from the drop down menu), 3) hours worked, and 4) check off in the box in the top right whoever you contacted on the case, relevant to that Contact Log.
* In the Notes box, enter the relevant notes from your contact (at the very least a summary, but you can be as detailed as you would like as you may want to refer back to it later; if writing for more than a few minutes, you may want to save frequently (and then go back in using the “edit” action to continue), or type your text in another program (e.g. Word) and then cut and paste it into Optima, in order to avoid being timed out of Optima and losing your work.
* Finally, click on "Create" in green at the bottom.
* Editing a recently created contact log: In the right-most column on the Contact Logs Tab you'll find the "Actions" that are available. The magnifying symbol is for just viewing the log, the pen and paper symbol is what you would click to edit the log, and the red X is the delete button. To edit, click on the pen and paper symbol, make your edits and save.
* There is a limit of 3 days for editing a contact log after you create it, and once it is approved by your Program Director you will have to contact them to make any changes.

**4.2** **contact log approval**

* After you click on "Create" your Program Director will get notice of your Contact Log and will review and approve it so it is logged on your case.
* If your Program Director would like you to change or update the Log, they will “Reject” it and add notes regarding the needed changes, and the log will appear in your list of contact logs as “rejected”, for you to edit. Once you make the edits and save, the PD will once again be notified and have the chance to approve it
* Please note: you are able to edit a contact log while it is in the “Pending” stage, until your Program Director approves it. Once it is approved by your Program Director only they can edit it (you can always add another Contact Log if you wanted to add something more)

**4.3 contact log history**

* All of the contact logs for a case will be stored on the “Contact Logs” tab
* These logs can be sorted by volunteer name, type, subject, date, status, etc.
* If you want to see a summary of the Contact Logs and the text that is written in the “Notes” section of the Contact Logs, click on the light blue “View Notes” button on the right-hand side of the Contact Logs tab
* If there is more than one volunteer assigned to a case, all of the volunteers can view all of the Contact Logs that have been entered for that case (even the Contact Logs entered by other volunteers)

**5. Training logs (In-Service and Continuing Education Hours)**

**5.1 entering a training log**

* After you sign in to Optima, you should be at your "Volunteer Dashboard" which will show a box highlighted in orange at the top of your screen.
* On the tool bar below, you will see the third tab says "Training Logs."  Click on the "Training Logs" tab.
* Then, click on the green box that says "Add"
* Finally, you can enter the training information and click "Create" at the bottom.  If the training was done by an outside presenter or completed own your own, you can leave the “Trainer” field blank. You do not have to enter your mileage unless you want to record this information for your own tax purposes. Please round your time up to the closest hour.

**5.2 Training Log Approval**

* After you complete these steps, Becky will get a notice that you have submitted training hours and she will approve your hours. (Becky approves all training hours for all our volunteers)
* Please remember that all CAC volunteers must meet the requirement of 12 hours of continuing education every calendar year. Optima will display your current number of hours completed under the “Total YTD Hours” heading on your “Training Logs” tab
* Please note that you are able to edit a training log while it is in the “Pending” stage, until Becky approves it. Once it is approved please contact Becky or another CAC staff member if something needs to be changed on the training log

**6. Updating or adding school information for a child**

**6.1** You may need to update the case information in Optima for your child/children's schools: e.g. Recording that they finished a grade level, entering summer school (if they are attending), and adding the next year grade and school (if it changes) in the fall.

* Within the "Children in Case" section of your case record, click on the magnifying glass for the child (you’ll need to do this for each child if you have more than one)
* Scroll to the bottom of the page and click on the “Schools” tab
* In the “School History” section at the bottom, fill in the appropriate information for the end of the school year; click on “add” for summer school, or for the beginning of the next school year, where applicable
* If a school does not appear in the drop-down menu, please contact Becky or your Program Director and they can add the school to the list

**7. Adding a document to your case**

**7.1** Occasionally you may receive documents related your case (e.g., at a PPT) that you need to scan and upload to your case in Optima.

* After you sign in to Optima, you should be at your "Volunteer Dashboard" which will show a box highlighted in orange at the top of your screen.
* Click on your case number to open up the Case Details.
* Scroll all the way to the bottom to the last tool bar and click on the "Documents" tab (5th from left).
* Click on the green “Add” button
* In the File Name section, click on Choose Files, and then select the file to be uploaded (this will be on your computer, wherever you saved the scanned file)
* In the Document Type section, click on Select Type; this will show a dropdown menu. Select the form type that most closely matches your document.
* Enter the Document Date.
* Click “Save”. You will now see the document included in the list on the Documents tab.
* At any time you can click on the magnifying glass in the “Action” column to view the document.