

How to access Court Report Template through Optima?

1. Log in to Optima and click on your case.
2. Scroll down to the bottom & find the tabs - Click 'Documents' tab.
3. Click "Document Date" Column header (this will sort your documents by date, oldest to newest).
4. The first document listed should say "CASA Court Report – Template" under the "Document Type" Column (and be titled "Court Report Format...")
5. Click magnifying glass in the "Action" column to Open

How to submit Court Reports through Optima

1. From your Court report template, edit your court report contents
(the same way you always have).
 2. "Save As" the file to your computer. Name the file "CASE NAME Hearing Date"
(i.e. "Smith 10-4-17")
 3. Return to Optima Volunteer Dashboard and click on your case
 4. Scroll down to the bottom & find the tabs - Click 'Documents' tab.
 5. Under the documents tab click the green "ADD" button
 6. Click Browse to Upload your new edited file (find your file, select, and click Open)
 7. Select "CASA Court Report – Draft" as the Document Type
 8. Enter the date of submission in the Document Date
 9. Click Save
- Your supervisor will open, review, make suggestions as needed, and upload the file back to Optima for you to edit and approve under the documents tab as "Court Report CASE NAME Draft 2".
 - If there is more than one round of edits needed we will continue the same process with Draft.3, Draft.4 and so on.
 - If your report does not need any clarification or more information, we will upload the final version to Optima (document type – "CASA Court Report – Final").